CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid Snowmobilers: All Snowmobilers Report

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

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CONTEXT IS EVERYTHING

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KEY OBJECTIVES

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

Objectives:
The objectives of this survey are to evaluate:

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



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in snowmobiling 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 Snowmobiler: The respondents who snowmobile, have a snowmobile trail permit or operator's license/registration (now or in the past 2 years), snowmobile at least once a month during the winter season, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Snowmobilers: n=236

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

Median Length of Interview:
- 20.7 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	236
Canada	86
Ontario	37
Quebec	9
Manitoba	19
Alberta	11
British Columbia	10

U.S. Drive	126
Illinois	17
Ohio	13
New York	19
Michigan	11
Wisconsin	34
Minnesota	20
Pennsylvania	5
Indiana	3
New Jersey	5

U.S. Fly	24
California	7
Colorado	14
Texas	4



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Snowmobilers: ± 6.4%

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 snowmobiler: Aged 30–64, snowmobiles, holds a snowmobile trail permit or operator's licence or registration (now or in the past two years), snowmobiles at least once a month during the winter season, and has a household income of $75K+ (Canada) or $50K+ (U.S.).

Markets: Ontario; Rest of Canada (Quebec, Manitoba, Alberta, British Columbia); U.S. Drive (Minnesota, Wisconsin, Illinois, Michigan, Indiana, Ohio, Pennsylvania, New York, New Jersey); U.S. Fly (California, Colorado, Texas). U.S. Fly snowmobilers are included in Overall but not shown separately because of small sample size.

Past visitors: Respondents who have visited Northern Ontario for a snowmobiling trip in the past five years (72% of avid snowmobilers, n=170).

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

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

Travel party spend: Total spend by the travel party on the most recent Northern Ontario trip, including accommodation, food and drink, activities, equipment and transportation within the region, and excluding airfare and pre-trip shopping. Shown in Canadian dollars; U.S. responses converted at 1.37.

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

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

AVG: Average (mean) response.

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



REPORT VERSION

All Snowmobilers report (this report)
All avid snowmobilers, n=236

Covers who avid snowmobilers 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 snowmobiling segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid snowmobilers who have visited Northern Ontario for snowmobiling in the past five years, n=170

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 snowmobilers on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID SNOWMOBILERS

Snowmobilers are an experienced, club-connected community introduced to the sport by family. Nearly half (47%) have been snowmobiling for more than 10 years, rising to 74% of older friend groups but only 29% of younger families, and 48% were introduced by a family member. Four in ten (40%) belong to a club or association. Eight in ten (83%) say snowmobiling is central to who they are, rising to 96% of younger families and 91% of U.S. Drive riders and falling to 60% of Rest of Canada riders. Trail or touring sleds (66%) and performance sleds (51%) are most common, and younger families are more likely to ride mountain or deep-snow sleds (53%), which older friend groups rarely use (2%). (See slides 34–37, 43–45, 47)

It is a focused winter product. Winter is preferred by 93%, falling to 74% of Rest of Canada riders. Snowmobilers average 4.6 overnight trips a year of 3.7 nights and are willing to travel 8.3 hours one way. Two-thirds (67%) drive their own vehicle and 55% tow a trailer, while 22% fly to a regional hub and drive on. (See slides 40, 41, 51–53)

Guiding is a U.S. and younger-family product. Most ride fully self-guided (61%), rising to 91% of Rest of Canada riders, but 47% of U.S. Drive riders and 52% of younger families mix guided and self-guided riding, against about one in ten Canadian riders. Two-thirds (65%) say working with local operators is important, rising to 84% of younger families and 78% of U.S. Drive riders and falling to 35% of Rest of Canada riders. (See slides 56, 57, 75)

They plan through personal networks and book directly. Most begin planning one to three months ahead (43%), rising to 60% of Ontario riders. Word of mouth (48%), internet search (42%) and social media content (39%) lead, though younger families rely much less on word of mouth (27%). Facebook (76%), Instagram (67%) and YouTube (65%) are the main platforms among social media users. Booking is mostly direct with accommodation providers (56%) or online (47%), and 60% are likely to use AI to plan a future trip, rising to 80% of younger families. (See slides 61–74, 76)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID SNOWMOBILERS

Thrill leads snowmobilers' motivations. Thrill and adventure (65%) is the top motivation, closely followed by connection with nature (63%), escape (61%) and bonding with friends or family (61%). Older friend groups are the most likely to ride for bonding (90%) and camaraderie with other riders (61%). Northern Lights viewing (49%) and all-inclusive packages (38%) are the strongest add-ons, younger families are more drawn to youth or family introduction programs (35%), and 38% of older friend groups would prefer to focus entirely on snowmobiling. (See slides 80–87)

Responsibility to the environment and to local communities is strong. Nine in ten (89%) feel a personal responsibility to protect the places they visit, and 88% say supporting local businesses is important when choosing a destination. More than three-quarters (77%) say certification is important, rising to 92% of younger families, and 55% have used a certified trail network such as the OFSC system. Younger families place more importance on community benefit (94%) and certified operators (87%) and are more willing to pay more for a conservation benefit (85%), while older friend groups are the least willing (35%). (See slides 77, 78, 104–107)

Barriers centre on cost and the condition of the trail product. Transportation costs (34%), poor trail grooming (32%) and cost (32%) lead, followed by poor access (29%) and poor value (28%). Rest of Canada riders are the most affected by transportation costs (54%) and poor value (49%), and older friend groups are more likely to cite poor access (57%) and the most likely to cite grooming (55%). Half (48%) say financial pressures have affected their travel plans, rising to 64% of Rest of Canada riders. (See slides 136–142)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID SNOWMOBILERS

Snowmobilers rate the product very highly, with Rest of Canada riders the exception. Among those who know the region, 98% rate it 4 or 5 out of 5, and 90% agree it has excellent groomed trails. Rest of Canada riders are the least familiar (23% know a lot about the region, against 50% overall) and the least convinced, with 62% agreeing Northern Ontario offers excellent snowmobiling experiences, 67% a wide variety of trails and 43% that it is better than alternatives closer to home. (See slides 109–116)

Trails come first, while younger families want a broader offer. Trail quality is the leading decision factor (93%). Younger families place more importance on activities for companions (92%) and snowmobiling events (76%), U.S. Drive riders on outfitters and guides (79%), and older friend groups little on outfitters (36%). (See slides 123–126)

Advocacy and intent are strong. The Net Promoter Score is 49, ranging from 30 among Rest of Canada riders to 61 among U.S. Drive riders. More than eight in ten (83%) are likely to visit in the next two years, including 98% of Ontario riders, 88% of whom are very likely, and 94% to 96% of younger families and younger friend groups. Three-quarters (77%) would make Northern Ontario the only or primary destination of a trip. (See slides 112, 120–122)

Riders prefer roofed lodging and road access. Short-term rentals (51%), drive-in lodges (47%) and hotels (46%) are preferred over campgrounds (20%), and 85% prefer road-accessible areas, rising to 98% of older friend groups. Accommodation availability (82%) and connectivity (81%) also matter to most riders. (See slides 123, 124, 127–130)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID SNOWMOBILERS

Snowmobiling balances an established base of older friend groups with younger families driving future growth. Older friend groups make up 24% of the estimated market and remain central to it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are a similar-sized audience today (23%), but show higher intent and are more likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 28 and 120, and slide 20 of the Past Visitors report)

Older friend groups are the established core, and the trail network is what keeps them. They are the most experienced riders (74% for more than 10 years), take 4.1 snowmobiling trips a year, and all of those who know Northern Ontario rate it 4 or 5 out of 5 (100%). Bonding (90%) and connection with nature (73%) drive their trips, and 38% would prefer to focus entirely on snowmobiling rather than add other experiences. Poor access (57%) and grooming (55%) are their main concerns, so investment in the trail network itself is the most practical way to keep them riding in Northern Ontario. They prefer short-term rentals (62%), plan through word of mouth (64%) and use Facebook (86%). (See slides 35, 40, 66, 71, 82, 83, 86, 87, 111, 130, 139)

Younger families want a packaged, all-season family product. They take 5.9 snowmobiling trips a year, 96% say snowmobiling is central to who they are, and 94% are likely to visit in the next two years. All-inclusive packages (50%), multi-activity packages (44%) and youth or family introduction programs (35%, against 14% overall) would enhance their trips, they are more open to fall riding (38%), and half (52%) mix guided and self-guided riding. They plan online rather than through word of mouth (27%), with Instagram (76%) their main platform and 80% likely to use AI to plan. (See slides 40, 47, 57, 66, 71, 76, 86, 87, 120)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID SNOWMOBILERS

Snowmobiling trips to Northern Ontario are high-value. Travel parties spent an average of $4,147 on their most recent trip, about $780 per visitor over 4.1 nights (roughly $190 per visitor per night), and eight in ten (80%) stayed in paid roofed accommodation.

U.S. Drive visitors deliver the highest yield. U.S. Drive snowmobilers spend $5,220 per party and about $910 per visitor, against about $360 per visitor for Ontario snowmobilers, who take the shortest trips (3.3 nights). The U.S. markets make up 71% of the potential market but 78% of its potential value. Rest of Canada snowmobilers spend about $780 per visitor but are the least likely to stay in paid roofed lodging (65%).

Families spend the most per trip. Older families travel in the largest parties (7.1 people) and spend the most per party ($5,567), while younger families are the most likely to use paid lodging (94%). Friend groups spend less per trip (about $3,250 to $4,010), and spend per visitor is similar across traveller types (about $680 to $820).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive snowmobilers would bring about $910,000 in visitor spending and 4,100 visitor nights. Each extra night adds about $190 per visitor, which makes the levers to extend stays (connectivity, better value and quality paid accommodation) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID SNOWMOBILERS

U.S. Drive snowmobilers spend the most per trip and per night; Ontario snowmobilers take the shortest, lowest-spend trips. Rest of Canada snowmobilers spend nearly as much per visitor but are the least likely to stay in paid roofed lodging (65%).

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$4,147	$1,844 ▼	$3,334	$5,220 ▲	$4,733*
Average party size (people)	5.3	5.2	4.3	5.7	5.8
Spend per visitor per trip	$776	$355	$778	$914	$817*
Average nights	4.1	3.3	4.7	4.1	4.8*
Spend per visitor per night	$189	$108	$167	$223	$169*
Stayed in paid roofed lodging	80%	79%	65%	83%	92%*

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



SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID SNOWMOBILERS

Families spend the most per trip, and younger families are the most likely to stay in paid roofed lodging (94%). Spend per visitor is similar across traveller types (about $680 to $820).

Measure	Overall	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$4,147	$4,943	$5,567	$3,249	$4,012
Average party size (people)	5.3	6.0	7.1	4.8	5.4
Spend per visitor per trip	$776	$822	$781	$683	$740
Average nights	4.1	4.6	4.7	4.0	4.1
Spend per visitor per night	$189	$180	$167	$171	$180
Stayed in paid roofed lodging	80%	94% ▲	84%	76%	78%

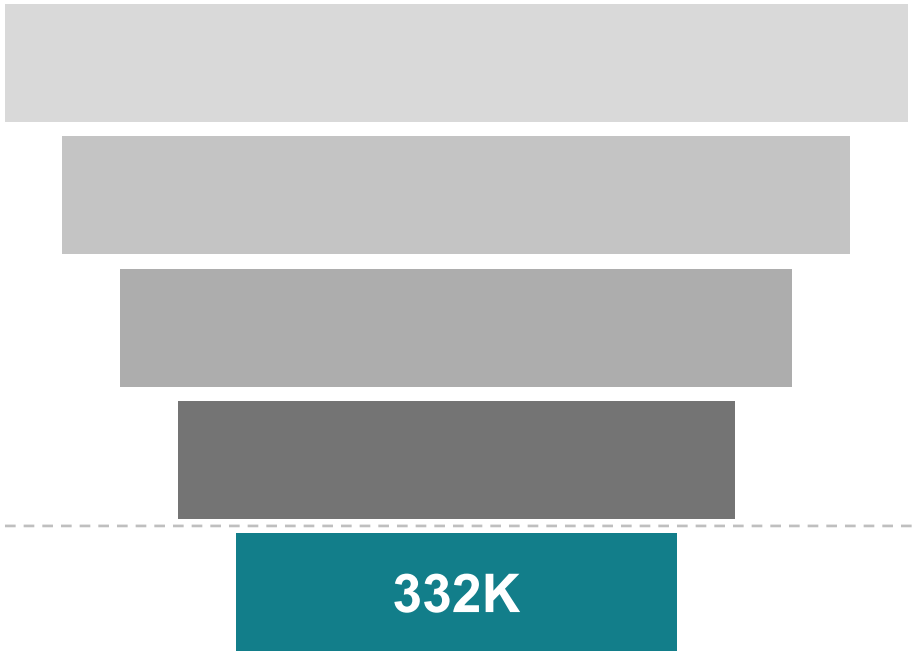
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID SNOWMOBILERS

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



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

Snowmobilers
Residents who ride a registered snowmobile.

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

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

Opportunity pool
Snowmobilers who intend to visit Northern Ontario for a snowmobiling trip within the next two years.

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

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

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID SNOWMOBILERS

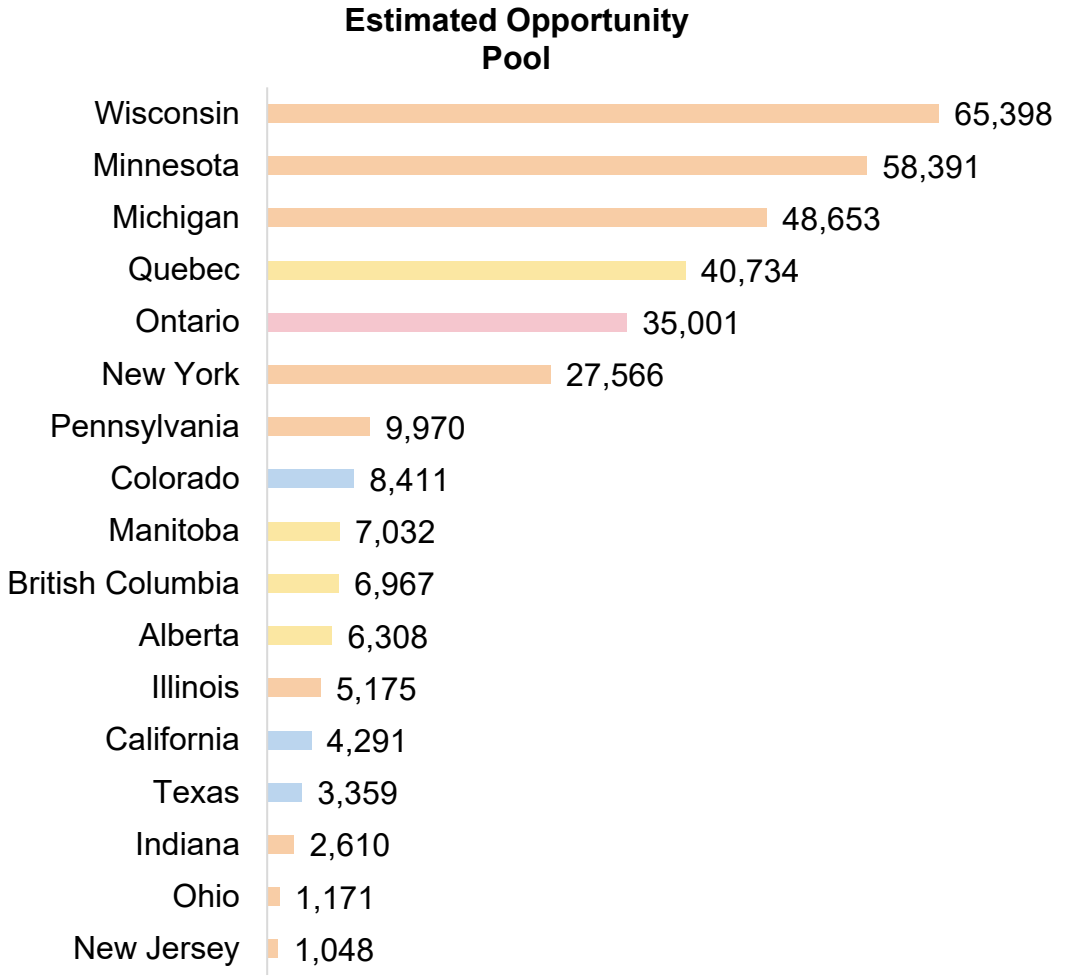
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
35,001

Rest of Canada
61,041

U.S. Drive
219,981

U.S. Fly
16,060



Avid snowmobilers aged 30–64 in the surveyed markets who told us they intend to take a snowmobiling trip to Northern Ontario in the next two years. Not a forecast of visitors. All markets: 332,083.

INCREMENTAL VISITOR SPEND: AVID SNOWMOBILERS

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

ONTARIO

35,001
Opportunity pool

1,000 additional visitors × **$355** spend per visitor = **$355K** incremental visitor spend

Rest of Canada

61,041
Opportunity pool

1,000 additional visitors × **$778** spend per visitor = **$778K** incremental visitor spend

U.S. Drive

219,981
Opportunity pool

1,000 additional visitors × **$914** spend per visitor = **$914K** incremental visitor spend

U.S. Fly

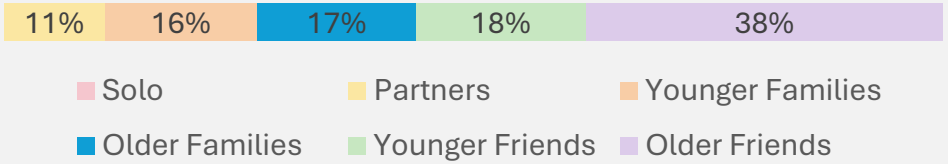
16,060
Opportunity pool

1,000 additional visitors × **$817** spend per visitor* = **$817K** incremental visitor spend

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

ONTARIO – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 35,001



HOW THEY TRAVEL

- Ontario riders are the core of the market, riding Northern Ontario most often and almost all planning to return.
- 91% have snowmobiled in Northern Ontario in the past five years, averaging 7.8 trips.
- Their most recent trip lasted 3.3 nights at $1,844 per party (the lowest of any market), and 79% stayed in paid roofed lodging.
- Hotels or motels (53%) and short-term rentals (49%) are the preferred lodging options.
- Northeast Ontario (72%) and The Great Canadian Wilderness (37%) are the most visited regions, and winter (100%) and fall (10%) the preferred seasons. (See slide 129, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Bonding with friends or family (77%) and connection with nature (67%) are the leading motivations.
- Escape from everyday stress follows (64%).
- All-inclusive packages (41%) and Northern Lights viewing (41%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE

- Supporting local businesses (94%) and community benefit (94%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (52%) and paying more for a clear conservation benefit (64%) compare with 69% and 66% for the segment.
- 83% say a recognized certification or designation is important. (See slides 77, 104, 106)

WHAT HOLDS THEM BACK

- Transportation costs (39%), poor trail grooming (38%) and weather or season timing (37%) are the leading barriers.
- 62% say financial pressures have affected their travel plans. (See slides 136, 142)

WHAT WOULD GROW THEM

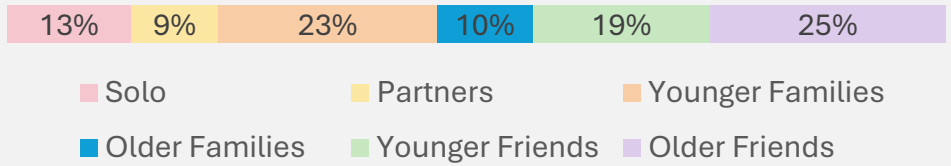
- Quality paid accommodation (45%), better trail conditions (37%) and better value (35%) would most encourage longer stays.
- 98% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 48 (segment 49). (See slides 112, 120, 131)

WHERE TO REACH THEM

- Word of mouth (59%), social media content (41%) and general search (36%) are the leading planning sources.
- Among social media users, YouTube (70%), Facebook (63%) and Instagram (63%) lead (small base).
- 47% are likely to use AI tools to plan their next trip. (See slides 63, 69, 76)

REST OF CANADA – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 61,041



HOW THEY TRAVEL

- Rest of Canada riders are the least engaged market and the most open to spring riding.
- 67% have snowmobiled in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.7 nights at $3,334 per party, and 65% stayed in paid roofed lodging.
- Drive-in lodges or resorts (49%) and short-term rentals (47%) are the preferred lodging options.
- The Great Canadian Wilderness (41%) and Sunset Country (38%) are the most visited regions, and winter (74%) and spring (47%) the preferred seasons. (See slide 129, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (67%) and connection with nature (63%) are the leading motivations.
- Wildlife encounters follows (63%).
- Multi-activity packages (46%) and Northern Lights viewing (46%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE

- Supporting local businesses (90%) and minimal environmental impact (77%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (52%) and paying more for a clear conservation benefit (40%) compare with 69% and 66% for the segment.
- 59% say a recognized certification or designation is important. (See slides 77, 104, 106)

WHAT HOLDS THEM BACK

- Transportation costs (54%), poor value for money (49%) and cost (44%) are the leading barriers.
- 64% say financial pressures have affected their travel plans. (See slides 136, 142)

WHAT WOULD GROW THEM

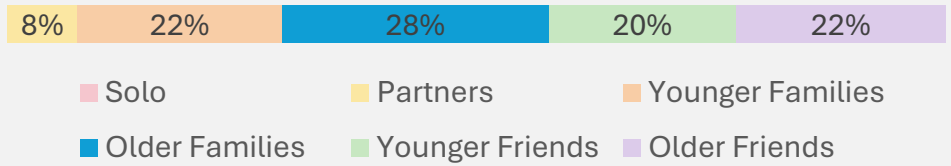
- Better connectivity (67%), more packaged experiences (43%) and secure storage (39%) would most encourage longer stays.
- 67% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 30 (segment 49). (See slides 112, 120, 131)

WHERE TO REACH THEM

- Social media content (51%), word of mouth (42%) and outfitter or lodge websites (29%) are the leading planning sources.
- Among social media users, Facebook (84%), YouTube (47%) and Instagram (47%) lead (small base).
- 52% are likely to use AI tools to plan their next trip. (See slides 63–64, 69, 76)

U.S. DRIVE – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 219,981



HOW THEY TRAVEL

- U.S. Drive riders take the highest-value trips and are the most likely to use guided experiences.
- 71% have snowmobiled in Northern Ontario in the past five years, averaging 2.9 trips.
- Their most recent trip lasted 4.1 nights at $5,220 per party (the highest of any market), and 83% stayed in paid roofed lodging.
- Short-term rentals (51%) and drive-in lodges or resorts (47%) are the preferred lodging options.
- Superior Country (35%) and Algoma Country (31%) are the most visited regions, and winter (97%) and fall (20%) the preferred seasons. (See slide 129, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Thrill and adventure (66%) and connection with nature (64%) are the leading motivations.
- Exploring open roads, trails or waterways follows (63%).
- Northern Lights viewing (53%) and wildlife viewing (37%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE

- Supporting local businesses (85%) and conservation (82%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (77%) and paying more for a clear conservation benefit (75%) compare with 69% and 66% for the segment.
- 81% say a recognized certification or designation is important. (See slides 77, 104, 106)

WHAT HOLDS THEM BACK

- Cost (31%), poor road, trail or water access (30%) and poor trail grooming (29%) are the leading barriers.
- 38% say financial pressures have affected their travel plans. (See slides 136, 142)

WHAT WOULD GROW THEM

- Quality paid accommodation (34%), better connectivity (34%) and better value (28%) would most encourage longer stays.
- 87% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 61 (segment 49). (See slides 112, 120, 131)

WHERE TO REACH THEM

- General search (50%), word of mouth (45%) and social media content (34%) are the leading planning sources.
- Among social media users, Facebook (75%), Instagram (75%) and YouTube (64%) lead.
- 62% are likely to use AI tools to plan their next trip. (See slides 63, 69, 76)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID SNOWMOBILERS

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

SOLO
9,276

YOUNGER FAMILIES
75,030

YOUNGER FRIENDS
62,711

PARTNERS
27,390

OLDER FAMILIES
78,191

OLDER FRIENDS
79,484

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

YOUNGER FAMILIES – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 75,030

WHO THEY ARE
- Younger families are newer but highly committed riders.
- 92% have children under 18 at home, and the largest age group is 35 to 44 (75%).
- 29% have been snowmobiling for more than 10 years (the lowest of any traveller type), and 96% say it is central to who they are (the highest of any traveller type).
- 44% belong to a club or association. (See slides 35, 45, 47)

HOW THEY TRAVEL
- 83% have snowmobiled in Northern Ontario in the past five years, averaging 3.6 trips.
- Their most recent trip lasted 4.6 nights at $4,943 per party, and 94% stayed in paid roofed lodging.
- Short-term rentals (56%) and hotels or motels (56%) are the preferred lodging options.
- Sunset Country (48%) and Northeast Ontario (48%) are the most visited regions, and winter (94%) and fall (38%) the preferred seasons. (See slide 130, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Thrill and adventure (68%) and bonding with friends or family (56%) are the leading motivations.
- Experiencing new places follows (54%).
- Northern Lights viewing (55%) and all-inclusive packages (50%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Supporting local businesses (98%) and community benefit (94%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (81%) and paying more for a clear conservation benefit (85%) are higher than in the segment.
- 92% say a recognized certification or designation is important (the highest of any traveller type). (See slides 77, 105, 107)

WHAT HOLDS THEM BACK
- Poor road, trail or water access (28%), safety concerns (28%) and cost (27%) are the leading barriers.
- 55% say financial pressures have affected their travel plans. (See slides 139, 142)

WHAT WOULD GROW THEM
- Better trail conditions (42%), better value (39%) and quality paid accommodation (36%) would most encourage longer stays.
- 94% are likely to visit in the next two years (above the segment's 83%).
- Among those who know the region, Northern Ontario's NPS is 52 (segment 49). (See slides 112, 120, 133)

WHERE TO REACH THEM
- Social media content (42%), official tourism websites (36%) and booking or review sites (35%) are the leading planning sources.
- Among social media users, Instagram (76%), YouTube (74%) and Facebook (64%) lead.
- 80% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 66, 71, 76)

OLDER FAMILIES – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 78,191

WHO THEY ARE
- Older families are frequent visitors who travel in the largest groups.
- 81% have children under 18 at home, and the largest age group is 45 to 54 (74%).
- 42% have been snowmobiling for more than 10 years, and 91% say it is central to who they are.
- 46% belong to a club or association. (See slides 35, 45, 47)

HOW THEY TRAVEL
- 78% have snowmobiled in Northern Ontario in the past five years, averaging 3.1 trips.
- Their most recent trip lasted 4.7 nights at $5,567 per party, and 84% stayed in paid roofed lodging.
- Hotels or motels (51%) and commercial cottages or cabins (46%) are the preferred lodging options.
- Northeast Ontario (48%) and Superior Country (38%) are the most visited regions, and winter (100%) and fall (28%) the preferred seasons. (See slide 130, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (72%) and escape from everyday stress (70%) are the leading motivations.
- Exploring open roads, trails or waterways follows (65%).
- Northern Lights viewing (51%) and wildlife viewing (47%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Conservation (91%) and supporting local businesses (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (75%) and paying more for a clear conservation benefit (76%) compare with 69% and 66% for the segment.
- 73% say a recognized certification or designation is important. (See slides 77, 105, 107)

WHAT HOLDS THEM BACK
- Cost (31%), poor trail grooming (28%) and weather or season timing (27%) are the leading barriers.
- 45% say financial pressures have affected their travel plans. (See slides 139, 142)

WHAT WOULD GROW THEM
- Better connectivity (48%), quality paid accommodation (41%) and more for travel companions to do (30%) would most encourage longer stays.
- 88% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 58 (segment 49). (See slides 112, 120, 133)

WHERE TO REACH THEM
- General search (57%), word of mouth (55%) and social media content (45%) are the leading planning sources.
- Among social media users, Facebook (82%), Instagram (81%) and TikTok (72%) lead (small base).
- 60% are likely to use AI tools to plan their next trip. (See slides 66, 71, 76)

YOUNGER FRIENDS – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 62,711

WHO THEY ARE
- Younger friend groups ride often and are the most likely to visit again.
- 43% have children under 18 at home, and the largest age group is 35 to 44 (57%).
- 43% have been snowmobiling for more than 10 years, and 80% say it is central to who they are.
- 41% belong to a club or association. (See slides 35, 45, 47)

HOW THEY TRAVEL
- 78% have snowmobiled in Northern Ontario in the past five years, averaging 4.0 trips.
- Their most recent trip lasted 4.0 nights at $3,249 per party, and 76% stayed in paid roofed lodging.
- Drive-in lodges or resorts (42%) and commercial cottages or cabins (40%) are the preferred lodging options.
- Superior Country (37%) and The Great Canadian Wilderness (29%) are the most visited regions, and winter (97%) and spring (28%) the preferred seasons. (See slide 130, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (63%) and thrill and adventure (54%) are the leading motivations.
- Bonding with friends or family follows (53%).
- Northern Lights viewing (45%) and wildlife viewing (43%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Minimal environmental impact (91%) and supporting local businesses (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (86%) compare with 69% and 66% for the segment.
- 80% say a recognized certification or designation is important. (See slides 77, 105, 107)

WHAT HOLDS THEM BACK
- Cost (35%), limited accommodation (29%) and transportation costs (27%) are the leading barriers.
- 41% say financial pressures have affected their travel plans. (See slides 139–140, 142)

WHAT WOULD GROW THEM
- Better connectivity (47%), better value (43%) and better trail conditions (36%) would most encourage longer stays.
- 96% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 50 (segment 49). (See slides 112, 120, 133)

WHERE TO REACH THEM
- Word of mouth (50%), general search (36%) and social media content (29%) are the leading planning sources.
- Among social media users, YouTube (83%), Instagram (74%) and Facebook (62%) lead (small base).
- 75% are likely to use AI tools to plan their next trip. (See slides 66, 71, 76)

OLDER FRIENDS – SNOWMOBILING

ESTIMATED OPPORTUNITY POOL: 79,484

WHO THEY ARE
- Older friend groups are the most experienced riders and the most critical of trail access and grooming.
- 39% have children under 18 at home, and the largest age group is 45 to 54 (59%).
- 74% have been snowmobiling for more than 10 years (the highest of any traveller type), and 79% say it is central to who they are.
- 44% belong to a club or association. (See slides 35, 45, 47)

HOW THEY TRAVEL
- 56% have snowmobiled in Northern Ontario in the past five years, averaging 3.7 trips.
- Their most recent trip lasted 4.1 nights at $4,012 per party, and 78% stayed in paid roofed lodging.
- Short-term rentals (62%) and hotels or motels (47%) are the preferred lodging options.
- Northeast Ontario (42%) and Superior Country (33%) are the most visited regions, and winter (89%) and spring (19%) the preferred seasons. (See slide 130, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (90%) and connection with nature (73%) are the leading motivations.
- Thrill and adventure follows (71%).
- Northern Lights viewing (40%) and all-inclusive packages (35%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Supporting local businesses (84%) and minimal environmental impact (75%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (44%) and paying more for a clear conservation benefit (35%) are lower than in the segment.
- 69% say a recognized certification or designation is important. (See slides 77, 105, 107)

WHAT HOLDS THEM BACK
- Poor road, trail or water access (57%), poor trail grooming (55%) and transportation costs (46%) are the leading barriers.
- 55% say financial pressures have affected their travel plans. (See slides 139, 142)

WHAT WOULD GROW THEM
- Better connectivity (35%), better value (32%) and secure storage (20%) would most encourage longer stays.
- 68% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 47 (segment 49). (See slides 112, 120, 133)

WHERE TO REACH THEM
- Word of mouth (64%), general search (42%) and social media content (37%) are the leading planning sources.
- Among social media users, Facebook (86%), Reddit (46%) and YouTube (44%) lead (small base).
- 43% are likely to use AI tools to plan their next trip. (See slides 66, 71, 76)



TRAVELLER & AVIDITY

YEARS SNOWMOBILING – MARKET

All snowmobilers

Half of snowmobilers (47%) have been snowmobiling for more than 10 years, and a third (32%) for 6 to 10 years. About one in five (17%) have been snowmobiling for 2 to 5 years, and 4% for less than 2 years.

Ontario snowmobilers are the most likely to have been snowmobiling for more than 10 years (61%), although market differences are not significant.

Years snowmobiling	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Less than 2 years	4%	0%	0%	7%
2 to 5 years	17%	16%	18%	12%
6 to 10 years	32%	23%	25%	36%
More than 10 years	47%	61%	57%	45%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). A1 How many years have you been snowmobiling as a hobby or recreational pursuit?

YEARS SNOWMOBILING – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to have been snowmobiling for more than 10 years (74%), while younger families are less likely (29%).

Younger families are more likely to have been snowmobiling for 6 to 10 years (49%).

Years snowmobiling	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Less than 2 years	4%	2%	3%	1%	7%
2 to 5 years	17%	19%	24%	17%	6%
6 to 10 years	32%	49% ▲	31%	38%	13%
More than 10 years	47%	29% ▼	42%	43%	74% ▲

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

Base: all snowmobilers (n=236). A1 How many years have you been snowmobiling as a hobby or recreational pursuit?

SNOWMOBILE USED MOST OFTEN – MARKET

All snowmobilers

Two-thirds of snowmobilers (66%) most often use a trail or touring sled, and half (51%) a performance or sport sled. Fewer use mountain or deep snow sleds (29%), crossover sleds (28%) or utility sleds (16%).

Trail or touring sleds are most common among Ontario snowmobilers (76%) and least common among Rest of Canada snowmobilers (47%). None of the market differences are significant.

Snowmobile	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Trail/touring sled	66%	76%	47%	71%
Performance/sport sled	51%	38%	54%	52%
Mountain/deep snow sled	29%	22%	21%	27%
Crossover sled	28%	14%	14%	34%
Utility sled	16%	6%	8%	19%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). A2 Which of the following best describes the snowmobile you most often use for snowmobiling trips? Please select all that apply.

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

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

SNOWMOBILE USED MOST OFTEN – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use a mountain or deep snow sled (53%), while older friend groups are less likely (2%).

Trail or touring sleds are the most common sled for every traveller type, from 62% among older families to 79% among younger families.

Snowmobile	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Trail/touring sled	66%	79%	62%	71%	65%
Performance/sport sled	51%	60%	43%	57%	47%
Mountain/deep snow sled	29%	53% ▲	37%	33%	2% ▼
Crossover sled	28%	35%	33%	22%	24%
Utility sled	16%	19%	23%	7%	11%

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

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

Base: all snowmobilers (n=236). A2 Which of the following best describes the snowmobile you most often use for snowmobiling trips? Please select all that apply.

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

SNOWMOBILE OWNERSHIP – MARKET

All snowmobilers

Most snowmobilers (83%) own their snowmobile, one in ten (10%) rent or borrow when needed and 6% lease.

Ownership ranges from 81% among Ontario snowmobilers to 93% among Rest of Canada snowmobilers.

Ownership	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Own	83%	81%	93%	87%
Lease	6%	5%	5%	4%
Rent or borrow when needed	10%	13%	2%	9%
Other	0%	0%	0%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). A2B Do you own, lease, or rent your snowmobile?

SNOWMOBILE OWNERSHIP – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Ownership ranges from 76% among older families to 89% among younger families.

Older families are the most likely to rent or borrow when needed (17%).

Ownership	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Own	83%	89%	76%	87%	87%
Lease	6%	5%	7%	8%	9%
Rent or borrow when needed	10%	7%	17%	5%	4%
Other	0%	0%	0%	0%	0%

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

Base: all snowmobilers (n=236). A2B Do you own, lease, or rent your snowmobile?

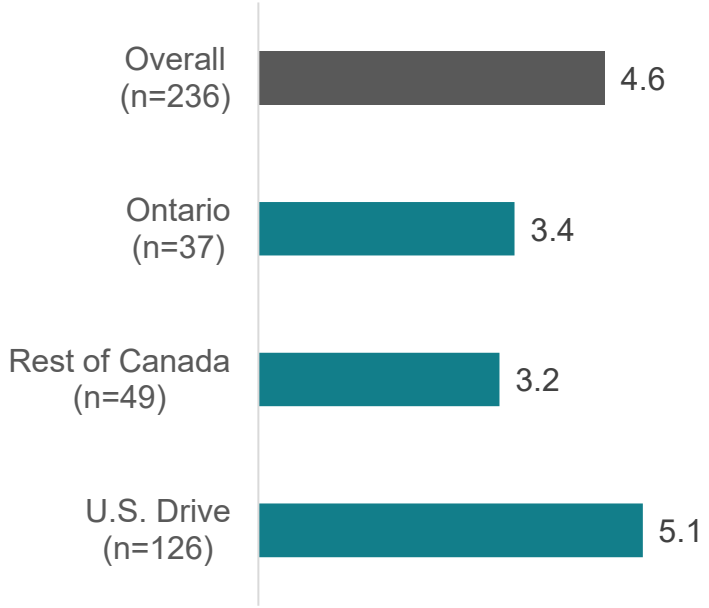
SNOWMOBILING TRIPS PER YEAR

All snowmobilers | Traveller types are defined on slide 10

Snowmobilers take an average of 4.6 overnight trips per year where snowmobiling is the primary purpose.

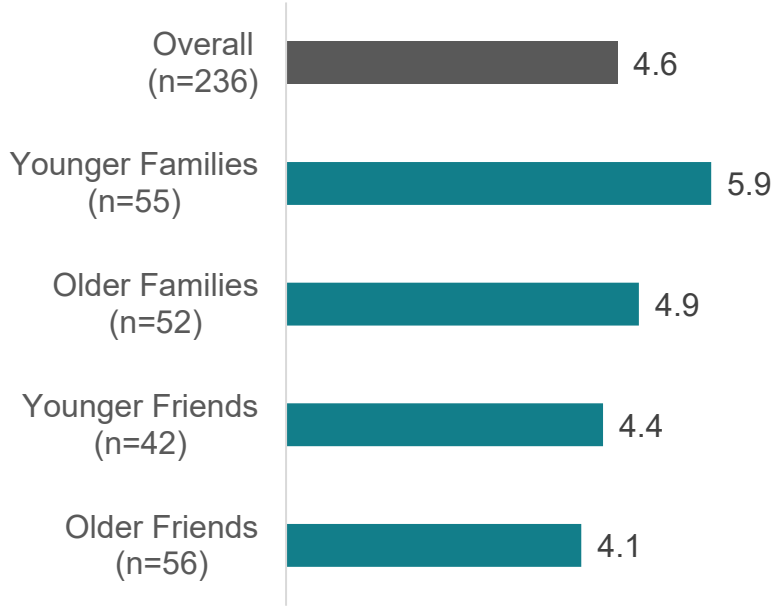
Averages range from 3.2 trips among Rest of Canada snowmobilers to 5.1 among U.S. Drive snowmobilers, and from 4.1 among older friend groups to 5.9 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). A3 Approximately how many overnight trips per year do you take where snowmobiling is the primary purpose?
AVG = average number of overnight trips per year.

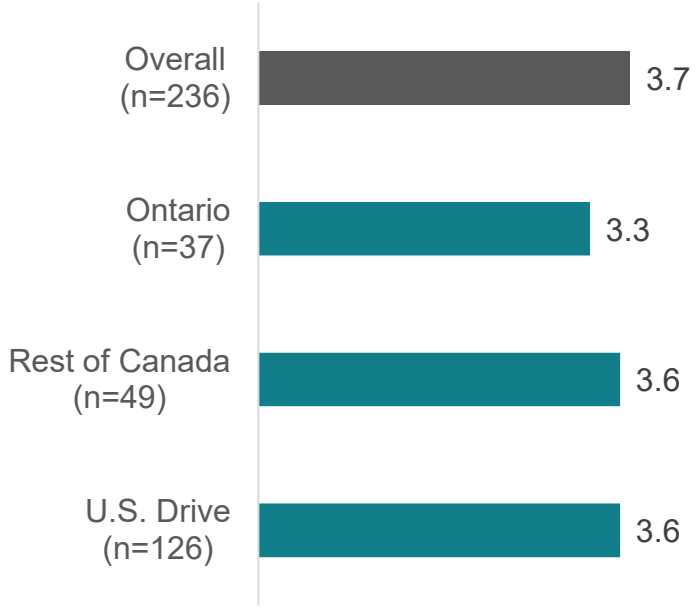
NIGHTS PER SNOWMOBILING TRIP

All snowmobilers | Traveller types are defined on slide 10

Snowmobiling trips last an average of 3.7 nights.

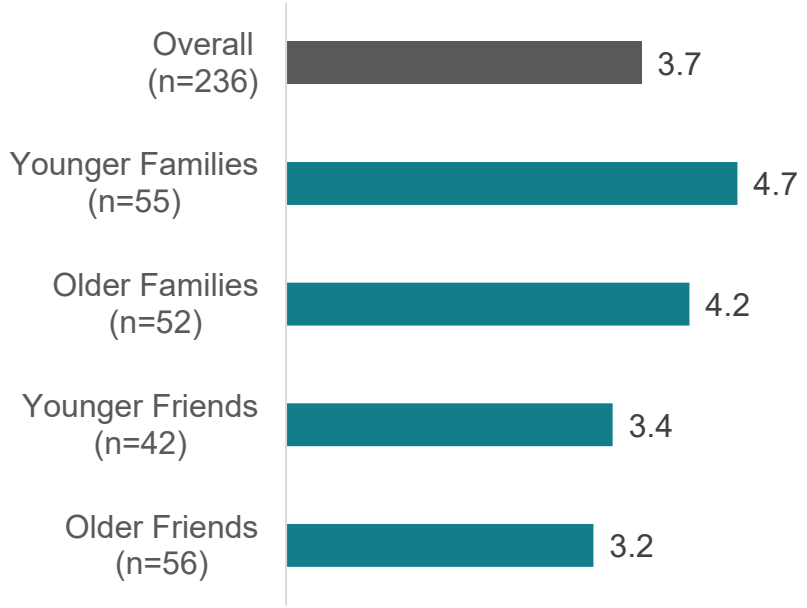
Trip length ranges from 3.3 nights among Ontario snowmobilers to 3.6 among Rest of Canada and U.S. Drive snowmobilers, and from 3.2 nights among older friend groups to 4.7 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). A4 How many nights do you typically spend on a snowmobiling trip? AVG = average number of nights.

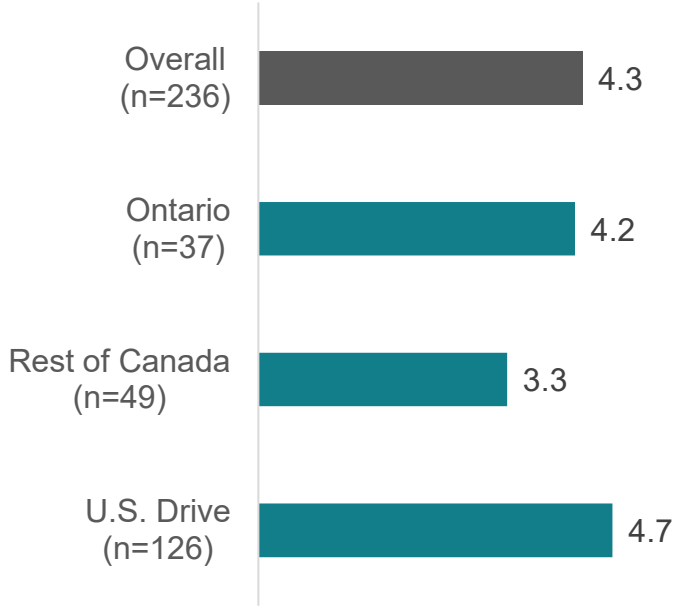
NUMBER OF PEOPLE TRAVELLED WITH ON SNOWMOBILING TRIPS

All snowmobilers | Traveller types are defined on slide 10

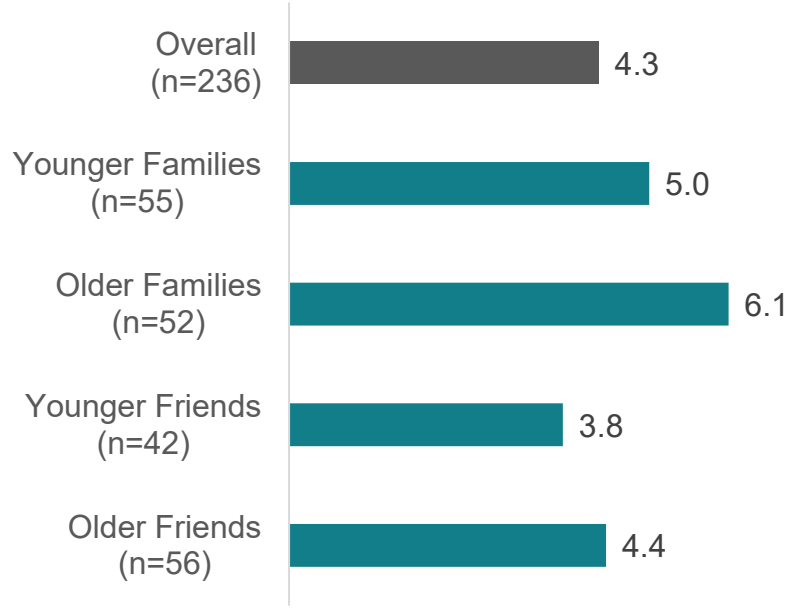
Snowmobilers typically travel with an average of 4.3 people on a snowmobiling trip.

Older families (6.1) and younger families (5.0) travel in the largest groups. Among markets, group size ranges from 3.3 among Rest of Canada snowmobilers to 4.7 among U.S. Drive snowmobilers.

MARKET



TRAVELLER TYPE



Base: all snowmobilers (n=236). A5 How many people do you typically travel with on a snowmobiling trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO SNOWMOBILING – MARKET

All snowmobilers

Half of snowmobilers (48%) got their first exposure to snowmobiling through a family member, and about a quarter (28%) through friends or peers.

Exposure through family is highest among Ontario snowmobilers (59%). None of the market differences are significant.

First exposure	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
A family member	48%	59%	42%	49%
School, camp, or organized program	10%	4%	4%	11%
Friends or peers	28%	30%	36%	23%
I discovered it on my own	13%	7%	18%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). A9 Where did you get your first exposure to snowmobiling? "Not sure" (1%) not shown.

FIRST EXPOSURE TO SNOWMOBILING – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger friend groups are the most likely to have been introduced by a family member (67%).

None of the traveller type differences are significant.

First exposure	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
A family member	48%	49%	42%	67%	41%
School, camp, or organized program	10%	9%	7%	9%	16%
Friends or peers	28%	32%	33%	20%	23%
I discovered it on my own	13%	9%	16%	4%	18%

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

Base: all snowmobilers (n=236). A9 Where did you get your first exposure to snowmobiling? "Not sure" (1%) not shown.

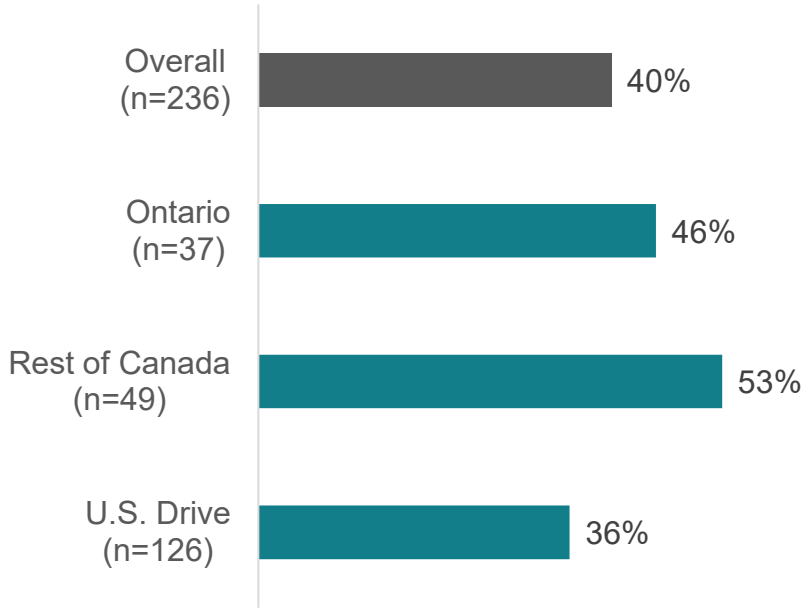
CLUB OR ASSOCIATION MEMBERSHIP

All snowmobilers | Traveller types are defined on slide 10

Four in ten snowmobilers (40%) are members of a snowmobiling-related club or association.

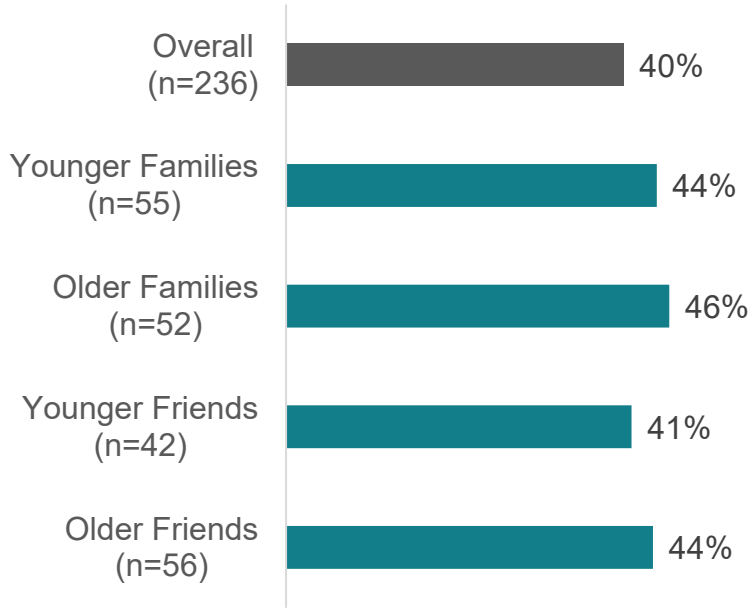
Membership ranges from 36% among U.S. Drive snowmobilers to 53% among Rest of Canada snowmobilers, and from 41% among younger friend groups to 46% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). A10 Are you currently a member of a snowmobiling-related club or association (e.g., riding club, snowmobile club, yacht/boating club)? % Yes shown; “No” (59%) and “Not sure” (<1%) not shown.

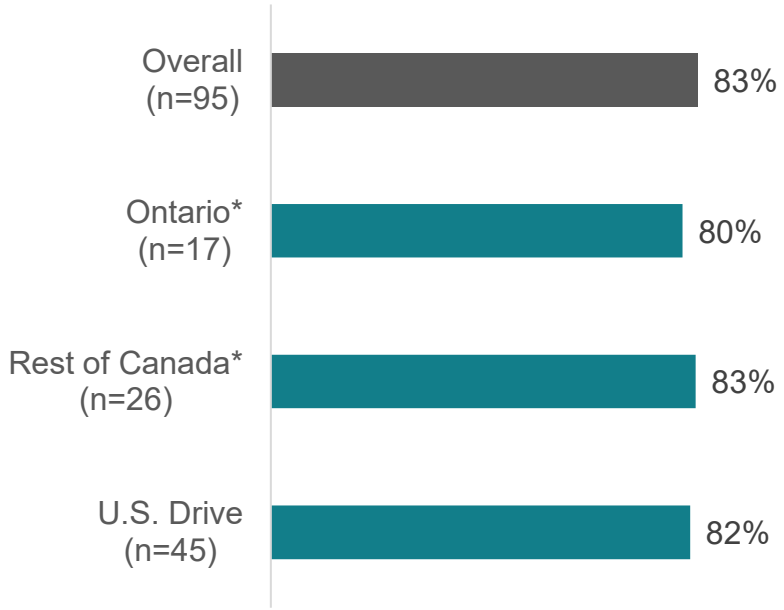
IMPORTANCE OF CLUB MEMBERSHIP

Snowmobilers who are club or association members | Traveller types are defined on slide 10

More than eight in ten club members (83%) say their membership is important to their overall snowmobiling experience, including half (50%) who say it is very important.

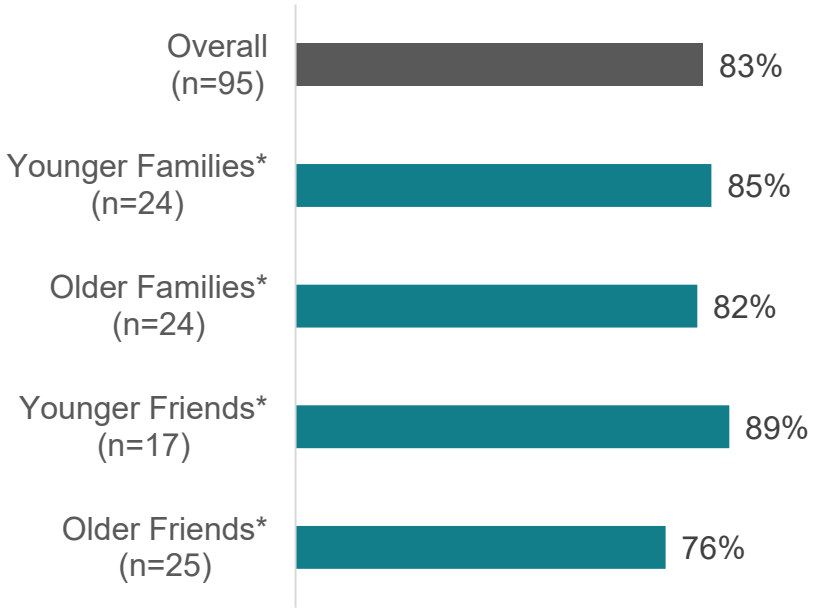
Market and traveller type bases are small for this question, and none of the differences are significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who are members of a snowmobiling-related club or association (A10) (n=95). A10B (TOP2) How important is your club or association membership to your overall snowmobiling experience? TOP2 = % somewhat or very important. *Small base (n<30); interpret with caution.

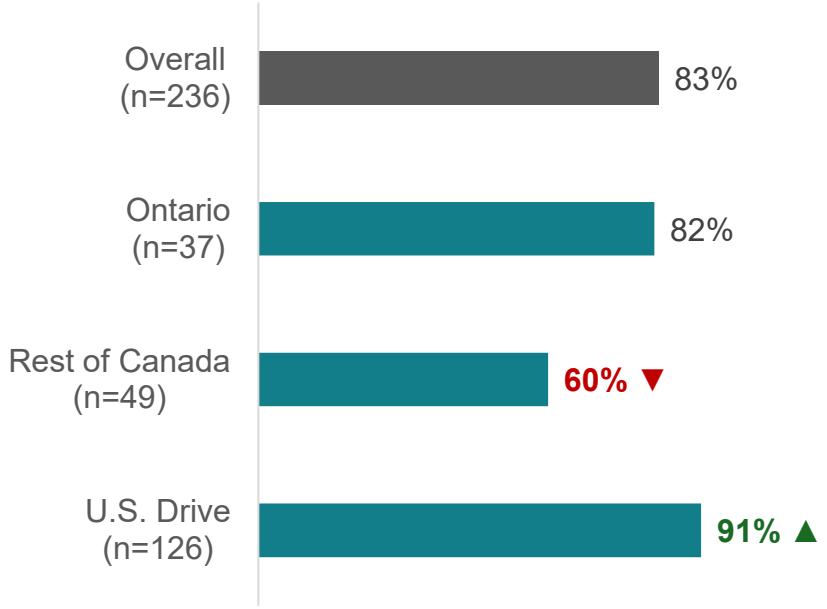
SNOWMOBILING AS A CENTRAL PART OF IDENTITY

All snowmobilers | Traveller types are defined on slide 10

More than eight in ten snowmobilers (83%) agree that snowmobiling and snowmobile culture is a central part of who they are, including half (50%) who strongly agree.

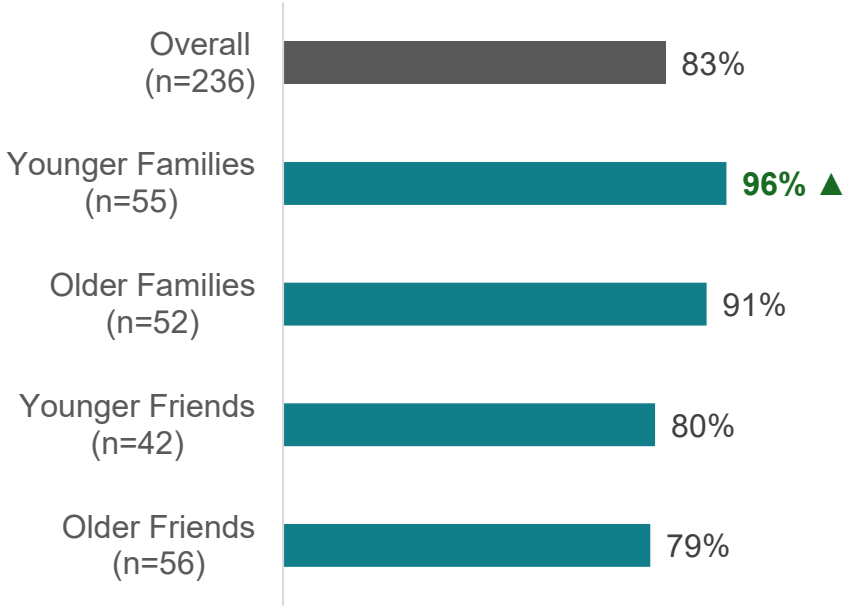
Agreement is higher among U.S. Drive snowmobilers (91%) and lower among Rest of Canada snowmobilers (60%). Younger families are more likely than other traveller types to agree (96%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). T2 (TOP2) How much do you agree or disagree with the following statement? "Snowmobiling and snowmobile culture is a central part of who I am." TOP2 = % somewhat or strongly agree.

ROLE OF SNOWMOBILING IN TRAVEL DECISIONS – MARKET

All snowmobilers

Eight in ten snowmobilers say snowmobiling is always (26%) or usually (53%) the primary purpose of their trips.

U.S. Drive snowmobilers are the most likely to say it is always the primary purpose (34%), although market differences are not significant.

Role in travel decisions	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
It is always the primary purpose of my trips	26%	14%	11%	34%
It is usually the primary purpose, but not always	53%	53%	57%	51%
It is often a secondary activity alongside other trip purposes	19%	23%	27%	15%
It is rarely the primary purpose of my trips	3%	10%	5%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). T2B Which of the following best describes the role snowmobiling plays in your travel decisions?

“Not sure” (0%) not shown.

ROLE OF SNOWMOBILING IN TRAVEL DECISIONS – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older families are the most likely to say snowmobiling is always the primary purpose of their trips (34%), and older friend groups to say it is usually the primary purpose (64%).

None of the traveller type differences are significant.

Role in travel decisions	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
It is always the primary purpose of my trips	26%	29%	34%	25%	23%
It is usually the primary purpose, but not always	53%	61%	42%	54%	64%
It is often a secondary activity alongside other trip purposes	19%	9%	24%	13%	11%
It is rarely the primary purpose of my trips	3%	1%	0%	8%	2%

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

Base: all snowmobilers (n=236). T2B Which of the following best describes the role snowmobiling plays in your travel decisions?

“Not sure” (0%) not shown.



HOW THEY TRAVEL

HOW SNOWMOBILERS GET TO THEIR DESTINATIONS – MARKET

All snowmobilers

Two-thirds of snowmobilers (67%) get to their destinations by personal vehicle, and more than half (55%) with a trailer. About one in five (22%) fly to a regional hub and then drive.

Flying to a regional hub is most common among U.S. Drive snowmobilers (24%). None of the market differences are significant.

Mode of travel	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Personal vehicle (car, truck, SUV)	67%	65%	69%	65%
Personal vehicle with trailer (e.g., boat, camper, ATV)	55%	57%	49%	57%
Fly to a regional hub, then drive	22%	7%	11%	24%
Float plane or charter flight to a remote destination	12%	4%	6%	13%
RV / motorhome	8%	2%	6%	7%
Other	1%	0%	3%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). T3 How do you typically get to your snowmobiling destinations? Please select all that apply.

"Not sure" (0%) not shown.

HOW SNOWMOBILERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families are the most likely to travel by personal vehicle (80%), with a trailer (67%) or by flying to a regional hub (35%).

None of the traveller type differences are significant.

Mode of travel	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Personal vehicle (car, truck, SUV)	67%	80%	64%	65%	47%
Personal vehicle with trailer (e.g., boat, camper, ATV)	55%	67%	61%	54%	53%
Fly to a regional hub, then drive	22%	35%	29%	17%	12%
Float plane or charter flight to a remote destination	12%	17%	18%	7%	10%
RV / motorhome	8%	13%	13%	3%	3%
Other	1%	0%	0%	0%	2%

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

Base: all snowmobilers (n=236). T3 How do you typically get to your snowmobiling destinations? Please select all that apply.

"Not sure" (0%) not shown.

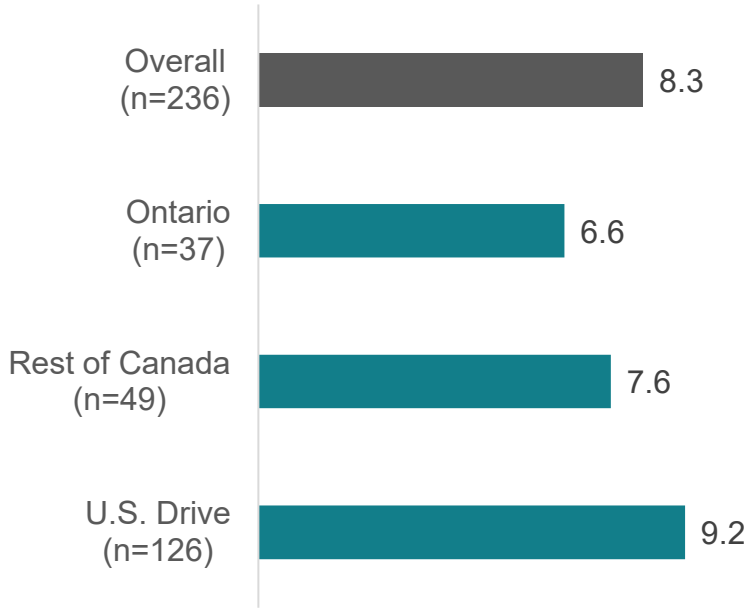
HOURS WILLING TO TRAVEL FOR A SNOWMOBILING TRIP

All snowmobilers | Traveller types are defined on slide 10

Snowmobilers are willing to travel an average of 8.3 hours one way for a snowmobiling trip.

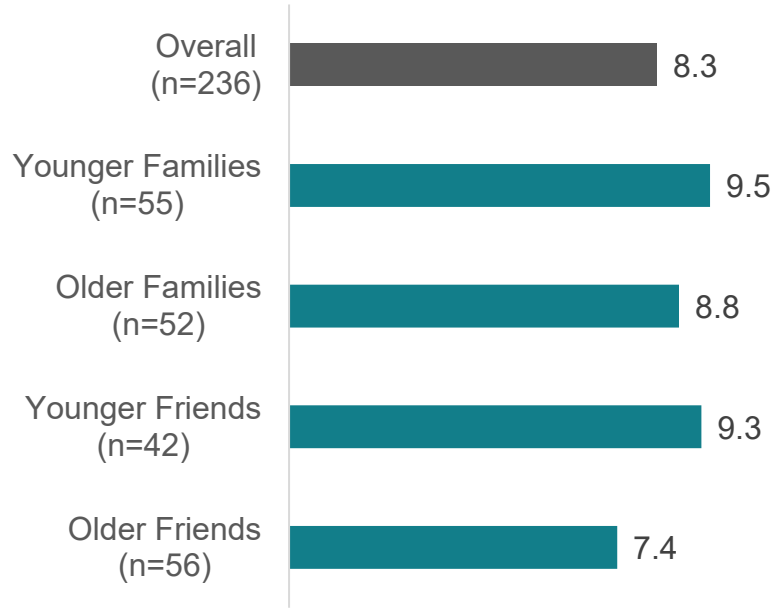
This ranges from 6.6 hours among Ontario snowmobilers to 9.2 among U.S. Drive snowmobilers, and from 7.4 hours among older friend groups to 9.5 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). T4 Approximately how many hours are you willing to travel (one way) for a snowmobiling trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All snowmobilers

Just over half of snowmobilers (54%) have their own gear or vehicle and do not use local outfitters or rental operators, while 40% also use them and 6% rely on outfitters, rental operators or marinas for most knowledge, supplies and services.

Relying on their own gear alone is most common among Rest of Canada snowmobilers (67%). None of the market differences are significant.

Approach	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	54%	57%	67%	53%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	40%	37%	31%	40%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	6%	6%	2%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). T5 Which of the following best describes your approach to snowmobiling gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (0%) not shown.

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

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are the most likely to rely on their own gear alone (81%), while older families and younger friend groups are the most likely to also use local outfitters or rental operators (51% each).

None of the traveller type differences are significant.

Approach	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	54%	50%	39%	49%	81%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	40%	48%	51%	51%	15%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	6%	2%	10%	0%	4%

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

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

Base: all snowmobilers (n=236). T5 Which of the following best describes your approach to snowmobiling gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (0%) not shown.

INDEPENDENT VS. GUIDED SNOWMOBILING – MARKET

All snowmobilers

Six in ten snowmobilers (61%) mainly ride on their own or with their own group, fully self-guided, while a third (35%) use a mix of guided and self-guided.

U.S. Drive snowmobilers are more likely than other markets to use a mix (47%) and less likely to go fully self-guided (48%), while Rest of Canada snowmobilers are more likely to go fully self-guided (91%). Ontario (10%) and Rest of Canada (9%) snowmobilers are less likely to use a mix.

Approach	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
I mainly go on my own or with my own group – fully self-guided	61%	80%	91% ▲	48% ▼
I use a mix of guided and self-guided	35%	10% ▼	9% ▼	47% ▲
I mainly use guided or outfitted experiences provided by operators	5%	10%	0%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). T6 When you go on a snowmobiling trip, do you mainly go independently or use guided/outfitted experiences?

“Not sure” (0%) not shown.

INDEPENDENT VS. GUIDED SNOWMOBILING – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use a mix of guided and self-guided (52%).

Older friend groups are the most likely to go fully self-guided (81%).

Approach	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
I mainly go on my own or with my own group – fully self-guided	61%	48%	55%	57%	81%
I use a mix of guided and self-guided	35%	52% ▲	42%	41%	16%
I mainly use guided or outfitted experiences provided by operators	5%	0%	3%	2%	2%

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

Base: all snowmobilers (n=236). T6 When you go on a snowmobiling trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (0%) not shown.

PREFERRED STYLE OF SNOWMOBILING – MARKET

All snowmobilers

Two-thirds of snowmobilers (65%) prefer a mix of groomed trail and backcountry riding, while a quarter (24%) prefer mostly groomed trail riding and 10% mostly backcountry or off-trail riding.

Ontario snowmobilers are the most likely to prefer mostly groomed trail riding (43%), although market differences are not significant.

Riding style	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Mostly groomed trail riding	24%	43%	14%	26%
Mostly backcountry/off-trail riding	10%	11%	12%	10%
A mix of both	65%	45%	74%	64%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). N9A Which of the following best describes your preferred style of snowmobiling? "Not sure" (0%) not shown.

PREFERRED STYLE OF SNOWMOBILING – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

A mix of both is the most common preference for every traveller type, from 60% among older families to 70% among younger friend groups.

None of the traveller type differences are significant.

Riding style	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Mostly groomed trail riding	24%	22%	24%	16%	32%
Mostly backcountry/off-trail riding	10%	9%	16%	14%	4%
A mix of both	65%	69%	60%	70%	64%

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

Base: all snowmobilers (n=236). N9A Which of the following best describes your preferred style of snowmobiling? "Not sure" (0%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR SNOWMOBILING TRIPS – MARKET

All snowmobilers

Most snowmobilers start planning 1 to 3 months (43%) or 3 to 6 months (28%) in advance, while 16% plan less than a month ahead and 12% six months or more ahead.

Ontario snowmobilers are the most likely to plan 1 to 3 months ahead (60%). None of the market differences are significant.

Planning lead time	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Less than 1 month	16%	21%	19%	15%
1 to 3 months	43%	60%	40%	40%
3 to 6 months	28%	14%	25%	31%
6 to 12 months	11%	3%	17%	12%
More than 12 months in advance	1%	2%	0%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). B1 How far in advance do you typically start planning a snowmobiling trip? "Not sure" (0%) not shown.

PLANNING LEAD TIME FOR SNOWMOBILING TRIPS – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older families are the most likely to plan 1 to 3 months ahead (54%), and older friend groups 6 to 12 months ahead (22%).

None of the traveller type differences are significant.

Planning lead time	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Less than 1 month	16%	10%	10%	28%	20%
1 to 3 months	43%	39%	54%	42%	40%
3 to 6 months	28%	35%	34%	29%	14%
6 to 12 months	11%	16%	3%	1%	22%
More than 12 months in advance	1%	0%	0%	0%	4%

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

Base: all snowmobilers (n=236). B1 How far in advance do you typically start planning a snowmobiling trip? "Not sure" (0%) not shown.

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

All snowmobilers

Word of mouth (48%), general internet search (42%) and social media content (39%) are the most common sources snowmobilers use for inspiration and planning.

Ontario snowmobilers are the most likely to use word of mouth (59%), and Rest of Canada snowmobilers social media content (51%). None of the market differences are significant.

Source	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Word of mouth (e.g., friends or family)	48%	59%	42%	45%
General internet search (e.g., Google, Bing)	42%	36%	23%	50%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	41%	51%	34%
Travel information centres or visitor centres	26%	26%	17%	29%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	21%	11%	27%
Official tourism websites (e.g., national, provincial, state, regional, city)	24%	15%	18%	29%
Forums or online communities	23%	20%	23%	24%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers

About one in five snowmobilers use AI tools (23%), outfitter or lodge websites (22%) or articles, blogs or videos (20%).

None of the market differences are significant.

Source	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	18%	10%	26%
Outfitter or lodge websites	22%	12%	29%	23%
Articles, blogs, or videos about travel destinations	20%	28%	11%	20%
Outdoor or sporting magazines or publications	17%	18%	13%	16%
Magazines, travel guides or brochures	17%	26%	6%	18%
Social media influencers	16%	18%	11%	14%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	16%	11%	15%	16%
TV shows or documentaries	14%	19%	10%	14%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers

Fewer than one in seven snowmobilers use each of the remaining sources, including club or association newsletters (14%).

None of the market differences are significant.

Source	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Club or association newsletters or websites	14%	20%	13%	11%
Consumer shows/exhibitions	9%	11%	2%	11%
Travel agents	9%	0%	4%	10%
Email newsletters	8%	9%	2%	8%
Travel-related phone lines or hotlines	7%	10%	6%	6%
Rally or event calendars	5%	9%	7%	2%
Other	3%	0%	6%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers | Traveller types are defined on slide 10

Younger families are less likely than other traveller types to use word of mouth (27%), while older friend groups are the most likely (64%).

Older families are the most likely to use general internet search (57%).

Source	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Word of mouth (e.g., friends or family)	48%	27% ▼	55%	50%	64%
General internet search (e.g., Google, Bing)	42%	34%	57%	36%	42%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	42%	45%	29%	37%
Travel information centres or visitor centres	26%	25%	36%	17%	19%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	35%	25%	24%	22%
Official tourism websites (e.g., national, provincial, state, regional, city)	24%	36%	33%	14%	14%
Forums or online communities	23%	31%	30%	17%	20%

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

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers | Traveller types are defined on slide 10

Older families are the most likely to use specialized apps (34%) and magazines or travel guides (31%), and younger families social media influencers (31%).

None of the traveller type differences are significant.

Source	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	33%	26%	23%	14%
Outfitter or lodge websites	22%	25%	33%	26%	6%
Articles, blogs, or videos about travel destinations	20%	24%	19%	13%	13%
Outdoor or sporting magazines or publications	17%	24%	19%	17%	15%
Magazines, travel guides or brochures	17%	19%	31%	6%	16%
Social media influencers	16%	31%	14%	20%	9%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	16%	20%	34%	6%	4%
TV shows or documentaries	14%	20%	12%	18%	5%

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

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers | Traveller types are defined on slide 10

Older families are the most likely to use club or association newsletters or websites (28%).

None of the traveller type differences are significant.

Source	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Club or association newsletters or websites	14%	16%	28%	10%	4%
Consumer shows/exhibitions	9%	15%	16%	4%	5%
Travel agents	9%	18%	12%	10%	0%
Email newsletters	8%	6%	17%	5%	3%
Travel-related phone lines or hotlines	7%	13%	7%	10%	3%
Rally or event calendars	5%	5%	8%	9%	0%
Other	3%	0%	0%	0%	6%

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

Base: all snowmobilers (n=236). B4 Which of the following do you use to find inspiration or plan your snowmobiling trips? Please select all that apply.

"Not sure" (1%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET (1 OF 2)

Snowmobilers who use social media to plan

Facebook (76%), Instagram (67%) and YouTube (65%) are the most used social media platforms for snowmobiling information, followed by TikTok (49%).

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

Platform	Overall (n=109)	Ontario* (n=17)	Rest of Canada* (n=28)	U.S. Drive (n=53)
Facebook	76%	63%	84%	75%
Instagram	67%	63%	47%	75%
YouTube	65%	70%	47%	64%
TikTok	49%	28%	30%	61%
Reddit	37%	10%	37%	38%
X (formerly known as Twitter)	24%	6%	17%	32%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who use social media to plan (B4) (n=109). B4B Which social media platforms do you use to obtain information about your snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET (2 OF 2)

Snowmobilers who use social media to plan

Fewer than one in five snowmobilers who use social media use Snapchat (19%), WhatsApp (15%), Pinterest (14%) or Threads (9%).

None of the market differences are significant.

Platform	Overall (n=109)	Ontario* (n=17)	Rest of Canada* (n=28)	U.S. Drive (n=53)
Snapchat	19%	14%	9%	21%
WhatsApp	15%	19%	11%	14%
Pinterest	14%	8%	6%	16%
Threads	9%	8%	0%	14%
Other	4%	0%	5%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who use social media to plan (B4) (n=109). B4B Which social media platforms do you use to obtain information about your snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE (1 OF 2)

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

Older friend groups are the most likely to use Facebook (86%) and the least likely to use Instagram (35%).

Traveller type bases are small for this question, and none of the differences are significant.

Platform	Overall (n=109)	Younger Families (n=31)	Older Families* (n=24)	Younger Friends* (n=17)	Older Friends* (n=23)
Facebook	76%	64%	82%	62%	86%
Instagram	67%	76%	81%	74%	35%
YouTube	65%	74%	60%	83%	44%
TikTok	49%	53%	72%	58%	25%
Reddit	37%	42%	20%	40%	46%
X (formerly known as Twitter)	24%	37%	10%	46%	18%

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

Base: snowmobilers who use social media to plan (B4) (n=109). B4B Which social media platforms do you use to obtain information about your snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE (2 OF 2)

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

Use of each remaining platform is a third or less in every traveller type.

None of the traveller type differences are significant.

Platform	Overall (n=109)	Younger Families (n=31)	Older Families* (n=24)	Younger Friends* (n=17)	Older Friends* (n=23)
Snapchat	19%	32%	33%	19%	0%
WhatsApp	15%	24%	26%	15%	0%
Pinterest	14%	20%	27%	5%	9%
Threads	9%	7%	10%	25%	6%
Other	4%	0%	6%	0%	15%

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

Base: snowmobilers who use social media to plan (B4) (n=109). B4B Which social media platforms do you use to obtain information about your snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

HOW SNOWMOBILING TRIPS ARE BOOKED – MARKET

All snowmobilers

Booking directly with accommodation providers (56%) is the most common way snowmobilers book trips, followed by online booking platforms (47%) and booking informally through friends or personal contacts (30%).

U.S. Drive snowmobilers are the most likely to book through a travel agent or tour operator (26%). None of the market differences are significant.

Booking method	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Directly with accommodation providers (lodge, hotel, cottage)	56%	64%	48%	56%
Through an online booking platform (e.g., Booking.com, Expedia)	47%	43%	37%	49%
Informally through friends or personal contacts	30%	29%	35%	30%
Directly with outfitters or guides	27%	12%	29%	27%
Through a travel agent or tour operator	19%	6%	10%	26%
Through a sporting or outdoor club or association	14%	16%	13%	12%
Other	<1%	0%	0%	<1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). B2 How do you typically book your snowmobiling trips? Please select all that apply. "Not sure" (<1%) not shown.

HOW SNOWMOBILING TRIPS ARE BOOKED – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older families (67%) and younger families (64%) are the most likely to book directly with accommodation providers, and younger friend groups informally through friends or personal contacts (46%).

None of the traveller type differences are significant.

Booking method	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Directly with accommodation providers (lodge, hotel, cottage)	56%	64%	67%	37%	62%
Through an online booking platform (e.g., Booking.com, Expedia)	47%	58%	48%	34%	60%
Informally through friends or personal contacts	30%	32%	26%	46%	22%
Directly with outfitters or guides	27%	37%	30%	24%	6%
Through a travel agent or tour operator	19%	24%	27%	17%	13%
Through a sporting or outdoor club or association	14%	26%	20%	14%	4%
Other	<1%	0%	0%	0%	0%

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

Base: all snowmobilers (n=236). B2 How do you typically book your snowmobiling trips? Please select all that apply. "Not sure" (<1%) not shown.

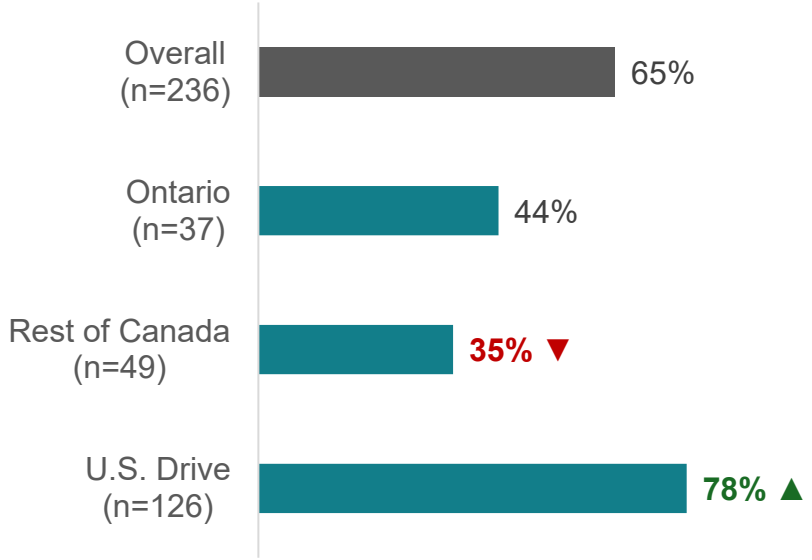
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All snowmobilers | Traveller types are defined on slide 10

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

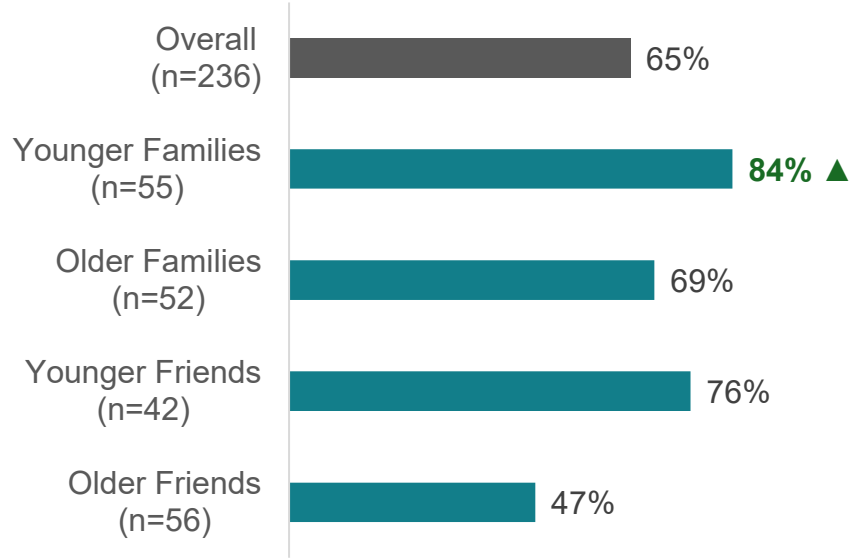
Importance is higher among U.S. Drive snowmobilers (78%) and younger families (84%), and lower among Rest of Canada snowmobilers (35%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers, excluding “Don’t know” (n=236). B3 (TOP2) When planning a snowmobiling trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider? TOP2 = % somewhat or very important.
“Local operators” in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

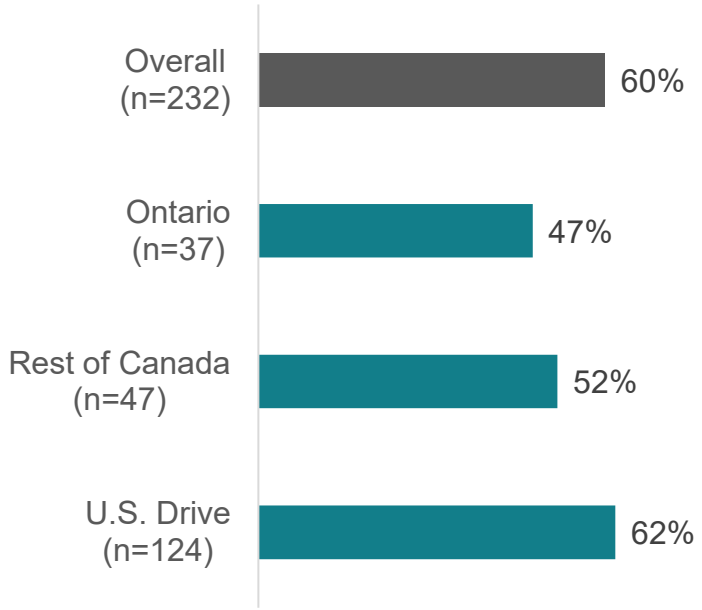
LIKELIHOOD OF USING AI TOOLS TO PLAN

All snowmobilers | Traveller types are defined on slide 10

Six in ten snowmobilers (60%) are likely to use AI tools to help plan their next snowmobiling trip.

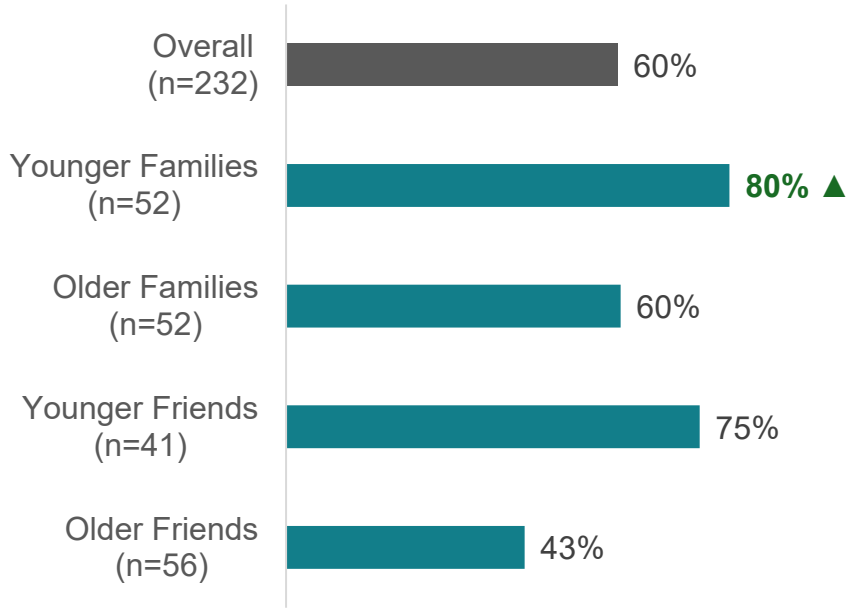
Younger families are more likely than other traveller types to use AI tools (80%). Market differences are not significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers, excluding “Don’t know” (n=232). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next snowmobiling trip? TOP2 = % somewhat or very likely.

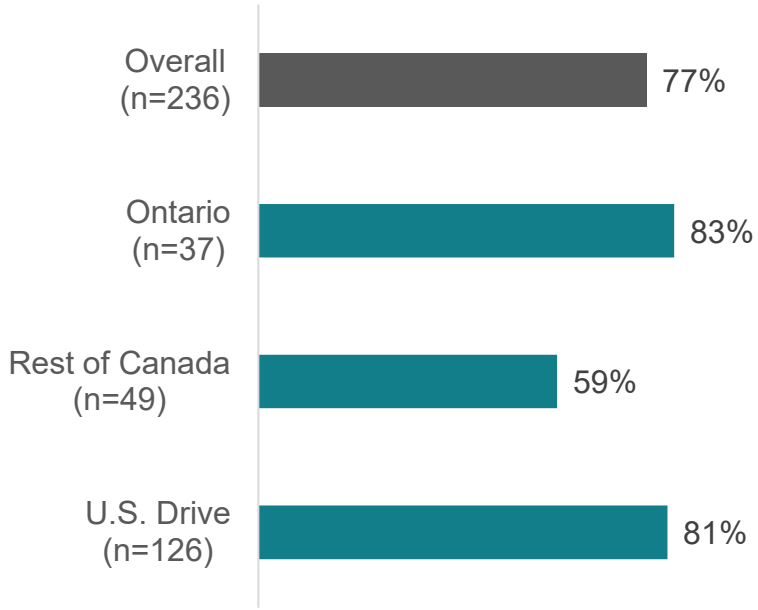
IMPORTANCE OF CERTIFICATION OR DESIGNATION

All snowmobilers | Traveller types are defined on slide 10

More than three-quarters of snowmobilers (77%) say it is important that accommodations, operators or destinations hold a recognized certification or designation.

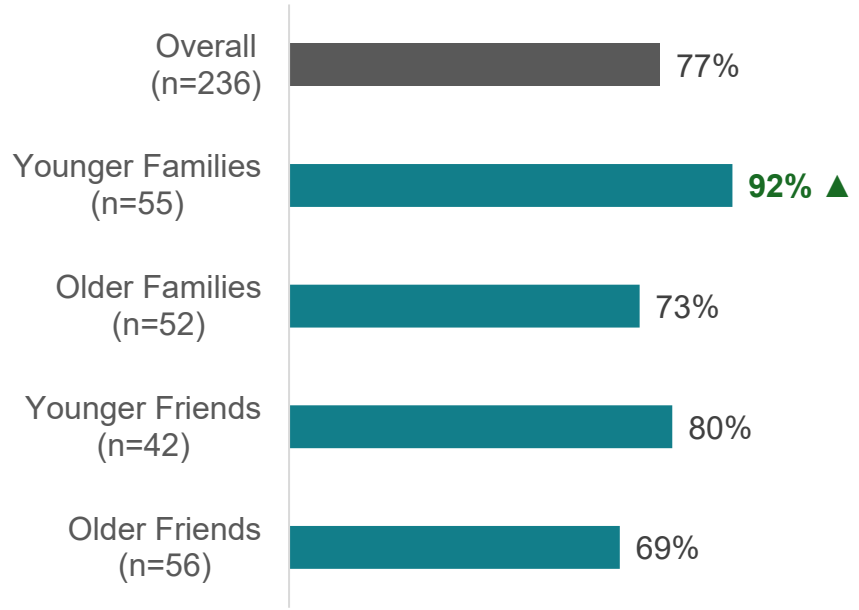
Younger families place more importance on certification than other traveller types (92%). Importance is lowest among Rest of Canada snowmobilers (59%), although market differences are not significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers, excluding “Don’t know” (n=236). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)? TOP2 = % somewhat or very important.

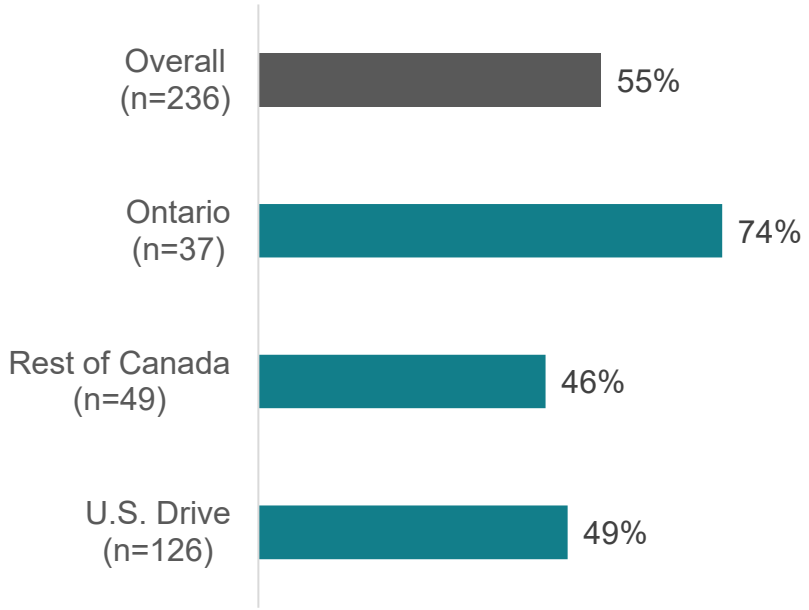
USE OF CERTIFIED ROUTES, TRAIL PASSES OR PASSPORT PROGRAMS

All snowmobilers | Traveller types are defined on slide 10

More than half of snowmobilers (55%) have used an established or certified touring route, trail pass network or rewards/passport program when planning a snowmobiling trip.

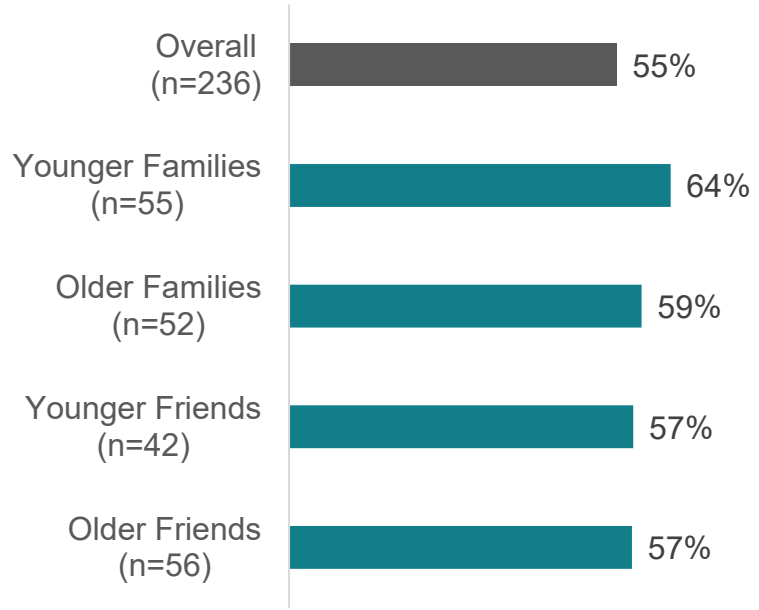
Use is highest among Ontario snowmobilers (74%), although market and traveller type differences are not significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). B7 Have you used an established or certified touring route, trail pass network, or rewards/passport program (e.g., the OFSC trail system, a certified motorcycle touring route) when planning a snowmobiling trip? % Yes shown; “No” (38%) and “Not sure” (7%) not shown.



MOTIVATION & VALUES

MOTIVATIONS FOR SNOWMOBILING – MARKET (1 OF 2)

All snowmobilers

Thrill, challenge or adventure (65%) is the top motivation for snowmobiling trips, closely followed by connection with nature (63%), escape from everyday stress (61%) and bonding with friends or family (61%).

Bonding with friends or family is highest among Ontario snowmobilers (77%). None of the market differences are significant.

Motivation	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Thrill, challenge, or sense of adventure	65%	64%	59%	66%
Connection with nature and the outdoors	63%	67%	63%	64%
Escape from everyday stress and routine	61%	64%	67%	58%
Bonding with friends or family	61%	77%	58%	62%
Experiencing new places and landscapes	54%	59%	50%	53%
Exploring open roads, trails, or waterways	52%	41%	34%	63%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). M1 What are your primary motivations for taking snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

MOTIVATIONS FOR SNOWMOBILING – MARKET (2 OF 2)

All snowmobilers

Close to half of snowmobilers (46%) are motivated by wildlife encounters, and a third by camaraderie (34%), solitude (33%) or physical fitness (33%).

Wildlife encounters motivate Rest of Canada snowmobilers most (63%). None of the market differences are significant.

Motivation	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Wildlife encounters and natural discovery	46%	31%	63%	44%
Camaraderie or connection with other snowmobiling enthusiasts	34%	25%	42%	35%
Solitude and personal reflection	33%	34%	31%	35%
Physical fitness and health	33%	39%	48%	24%
Tradition or cultural heritage related to the activity	19%	13%	4%	27%
Other	1%	0%	6%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). M1 What are your primary motivations for taking snowmobiling trips? Please select all that apply.

“Not sure” (0%) not shown.

MOTIVATIONS FOR SNOWMOBILING – TRAVELLER TYPE (1 OF 2)

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are the most likely to be motivated by bonding with friends or family (90%), connection with nature (73%) and thrill or adventure (71%).

None of the traveller type differences are significant.

Motivation	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Thrill, challenge, or sense of adventure	65%	68%	60%	54%	71%
Connection with nature and the outdoors	63%	48%	72%	51%	73%
Escape from everyday stress and routine	61%	52%	70%	63%	68%
Bonding with friends or family	61%	56%	58%	53%	90%
Experiencing new places and landscapes	54%	54%	62%	50%	57%
Exploring open roads, trails, or waterways	52%	49%	65%	41%	53%

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

Base: all snowmobilers (n=236). M1 What are your primary motivations for taking snowmobiling trips? Please select all that apply.

"Not sure" (0%) not shown.

MOTIVATIONS FOR SNOWMOBILING – TRAVELLER TYPE (2 OF 2)

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are the most likely to be motivated by camaraderie with other snowmobiling enthusiasts (61%).

None of the traveller type differences are significant.

Motivation	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Wildlife encounters and natural discovery	46%	40%	45%	40%	42%
Camaraderie or connection with other snowmobiling enthusiasts	34%	24%	37%	25%	61%
Solitude and personal reflection	33%	30%	36%	37%	39%
Physical fitness and health	33%	38%	36%	30%	29%
Tradition or cultural heritage related to the activity	19%	22%	20%	6%	30%
Other	1%	0%	0%	0%	0%

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

Base: all snowmobilers (n=236). M1 What are your primary motivations for taking snowmobiling trips? Please select all that apply.

“Not sure” (0%) not shown.

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

All snowmobilers

Northern Lights or dark sky viewing (49%) is the additional experience most likely to enhance a snowmobiling trip, followed by all-inclusive packages (38%), culinary experiences (36%), wildlife viewing (35%) and multi-activity packages (35%).

None of the market differences are significant.

Additional experience	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Northern Lights or dark sky viewing experiences	49%	41%	46%	53%
All-inclusive lodge or touring packages	38%	41%	42%	34%
Culinary experiences featuring locally sourced or freshly caught / harvested food	36%	27%	45%	34%
Wildlife viewing separate from snowmobiling	35%	33%	24%	37%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	35%	20%	46%	34%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	30%	32%	31%	29%
Scenic driving or road trip components	29%	40%	29%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). M2 Beyond snowmobiling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers

About a quarter of snowmobilers are interested in snowmobiling rallies or club events (27%), photography experiences (26%) or Indigenous-led experiences (24%), and 13% would prefer to focus entirely on snowmobiling.

None of the market differences are significant.

Additional experience	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Snowmobiling rallies, races, or club events	27%	22%	15%	31%
Photography or nature interpretation guided experiences	26%	25%	27%	25%
Indigenous-led cultural or land-based experiences	24%	13%	23%	27%
Multi-stop regional itineraries combining several Northern Ontario areas	22%	14%	6%	31%
Learning and interpretation opportunities	18%	11%	15%	20%
Youth or family-oriented introduction-to-snowmobiling programs	14%	12%	9%	14%
None – I prefer to focus entirely on snowmobiling	13%	15%	21%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). M2 Beyond snowmobiling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers | Traveller types are defined on slide 10

Younger families show the highest interest in all-inclusive packages (50%) and multi-activity packages (44%), and older families in wildlife viewing (47%) and wellness experiences (44%).

None of the traveller type differences are significant.

Additional experience	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Northern Lights or dark sky viewing experiences	49%	55%	51%	45%	40%
All-inclusive lodge or touring packages	38%	50%	29%	25%	35%
Culinary experiences featuring locally sourced or freshly caught / harvested food	36%	38%	33%	36%	23%
Wildlife viewing separate from snowmobiling	35%	37%	47%	43%	20%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	35%	44%	40%	26%	16%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	30%	27%	44%	28%	17%
Scenic driving or road trip components	29%	40%	26%	22%	17%

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

Base: all snowmobilers (n=236). M2 Beyond snowmobiling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in youth or family-oriented introduction-to-snowmobiling programs (35%), while older friend groups are more likely to prefer to focus entirely on snowmobiling (38%).

Older families show the highest interest in Indigenous-led experiences (41%) and multi-stop itineraries (39%).

Additional experience	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Snowmobiling rallies, races, or club events	27%	31%	40%	32%	14%
Photography or nature interpretation guided experiences	26%	27%	24%	13%	25%
Indigenous-led cultural or land-based experiences	24%	13%	41%	12%	12%
Multi-stop regional itineraries combining several Northern Ontario areas	22%	32%	39%	12%	5%
Learning and interpretation opportunities	18%	16%	30%	20%	0%
Youth or family-oriented introduction-to-snowmobiling programs	14%	35% ▲	17%	10%	1%
None – I prefer to focus entirely on snowmobiling	13%	4%	6%	10%	38% ▲

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

Base: all snowmobilers (n=236). M2 Beyond snowmobiling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

Snowmobilers who provided a response

When asked what makes a snowmobiling trip successful, snowmobilers most often mention fun and enjoyment (44%) and good trails and snow conditions (30%), followed by time with family and friends (26%) and safety (21%).

Ontario snowmobilers are the most likely to mention good trails and snow (38%) and everyone in the group enjoying it (29%). None of the market differences are significant.

Theme	Overall (n=233)	Ontario (n=36)	Rest of Canada (n=49)	U.S. Drive (n=125)
Fun / enjoyment / a good time	44%	49%	43%	42%
Good trails / snow conditions	30%	38%	21%	32%
Time with family, friends or loved ones	26%	10%	33%	28%
Safety / no accidents / getting home safely	21%	27%	6%	26%
Scenery / nature / wildlife	18%	21%	14%	19%
No problems / things go smoothly	14%	22%	0%	17%
Everyone in the group enjoys it	13%	29%	7%	13%
Good planning / preparation / reliable equipment	10%	4%	5%	12%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

Snowmobilers who provided a response

Fewer than one in ten snowmobilers mention each of the themes on this slide, led by good roads and routes (9%).

None of the market differences are significant.

Theme	Overall (n=233)	Ontario (n=36)	Rest of Canada (n=49)	U.S. Drive (n=125)
Good roads / routes / open road	9%	19%	2%	8%
Relaxation / peace / stress-free	8%	4%	0%	11%
New experiences / exploring / learning	7%	6%	2%	7%
Escape / getting away / unplugging / freedom	7%	5%	6%	6%
Good weather	6%	3%	13%	4%
Good food and drink	6%	13%	5%	4%
Bonding / making memories	5%	0%	5%	6%
Adventure / excitement / thrill	5%	6%	4%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

Snowmobilers who provided a response

Each remaining theme is mentioned by fewer than 5% of snowmobilers.

Theme	Overall (n=233)	Ontario (n=36)	Rest of Canada (n=49)	U.S. Drive (n=125)
Coming home happy / satisfied / wanting to return	4%	5%	15%	1%
Good accommodation / campsites / amenities	3%	5%	2%	2%
Local culture / meeting people	1%	2%	2%	0%
Calm water / good boating conditions	1%	0%	0%	2%
Affordable / good value / on budget	<1%	0%	0%	0%
Fishing / catching fish	0%	0%	0%	0%
General positive / vague	1%	0%	2%	1%
Other	3%	0%	5%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

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

Older friend groups are more likely than other traveller types to say a successful trip is one with no problems (35%).

Younger friend groups are the most likely to mention fun and enjoyment (55%), and older families time with family and friends (39%).

Theme	Overall (n=233)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=55)
Fun / enjoyment / a good time	44%	46%	47%	55%	27%
Good trails / snow conditions	30%	25%	35%	24%	33%
Time with family, friends or loved ones	26%	28%	39%	38%	9%
Safety / no accidents / getting home safely	21%	19%	21%	21%	31%
Scenery / nature / wildlife	18%	17%	18%	5%	17%
No problems / things go smoothly	14%	5%	13%	4%	35% ▲
Everyone in the group enjoys it	13%	12%	5%	13%	26%
Good planning / preparation / reliable equipment	10%	5%	5%	7%	19%

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

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

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

Mentions of each theme on this slide are 16% or lower for every traveller type.

None of the traveller type differences are significant.

Theme	Overall (n=233)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=55)
Good roads / routes / open road	9%	5%	12%	16%	7%
Relaxation / peace / stress-free	8%	2%	4%	16%	13%
New experiences / exploring / learning	7%	13%	5%	6%	3%
Escape / getting away / unplugging / freedom	7%	8%	3%	7%	6%
Good weather	6%	5%	4%	10%	5%
Good food and drink	6%	7%	9%	3%	4%
Bonding / making memories	5%	6%	5%	4%	5%
Adventure / excitement / thrill	5%	7%	5%	4%	5%

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

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

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

Each remaining theme is mentioned by a small share of every traveller type.

Theme	Overall (n=233)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=55)
Coming home happy / satisfied / wanting to return	4%	4%	0%	0%	15%
Good accommodation / campsites / amenities	3%	4%	4%	1%	0%
Local culture / meeting people	1%	2%	0%	1%	0%
Calm water / good boating conditions	1%	0%	0%	0%	5%
Affordable / good value / on budget	<1%	1%	0%	0%	0%
Fishing / catching fish	0%	0%	0%	0%	0%
General positive / vague	1%	5%	0%	1%	0%
Other	3%	4%	3%	4%	3%

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

Base: snowmobilers who provided a response (n=233). M3 In your own words, what makes a snowmobiling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (0%) not shown.

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

Snowmobilers who provided a response

Snowmobilers see Northern Ontario's trails, snow and terrain for riding (48%) as its greatest advantage, well ahead of wilderness (23%) and scenery (23%).

Trails and snow are mentioned most by Ontario snowmobilers (68%). None of the market differences are significant.

Advantage	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Trails / snow / terrain for riding	48%	68%	34%	48%
Wilderness / untouched / pristine nature	23%	29%	15%	25%
Scenery / natural beauty / landscapes	23%	23%	10%	27%
Uncrowded / quiet / remote / solitude	13%	15%	15%	10%
Vast / open space / room to explore	11%	12%	9%	11%
Climate / cooler weather / seasons	9%	7%	4%	9%
Unique / different / new to me / in Canada	8%	0%	17%	6%
Variety of things to do / places to explore	7%	4%	6%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

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

Snowmobilers who provided a response

Each of the advantages on this slide is mentioned by fewer than one in ten snowmobilers.

None of the market differences are significant.

Advantage	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Good roads / scenic routes and drives	4%	8%	2%	4%
Lakes / rivers / water	4%	9%	6%	2%
Wildlife	4%	2%	2%	3%
Culture / history / Indigenous heritage	3%	0%	6%	1%
Northern lights / dark skies / stars	3%	0%	2%	2%
Friendly / welcoming people / hospitality	3%	2%	0%	1%
Close to home / easy to get to	2%	12%	0%	<1%
Safe destination	2%	5%	0%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

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

Snowmobilers who provided a response

Each remaining advantage is mentioned by few snowmobilers, and 7% give a general positive response.

Advantage	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Fishing	2%	0%	6%	1%
Affordable / good value	1%	0%	0%	1%
Escape from the city / everyday life	1%	2%	2%	1%
Clean environment / fresh air	1%	3%	0%	<1%
Forests / trees / fall colours	1%	0%	0%	1%
General positive / vague	7%	2%	5%	7%
Other	3%	0%	0%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

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

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

Older friend groups are the most likely to mention trails, snow and terrain for riding (72%), and older families wilderness (37%) and scenery (38%).

None of the traveller type differences are significant.

Advantage	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Trails / snow / terrain for riding	48%	42%	46%	34%	72%
Wilderness / untouched / pristine nature	23%	14%	37%	34%	16%
Scenery / natural beauty / landscapes	23%	19%	38%	14%	16%
Uncrowded / quiet / remote / solitude	13%	4%	14%	9%	6%
Vast / open space / room to explore	11%	12%	14%	7%	14%
Climate / cooler weather / seasons	9%	13%	10%	5%	7%
Unique / different / new to me / in Canada	8%	11%	0%	7%	10%
Variety of things to do / places to explore	7%	6%	0%	9%	10%

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

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

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

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

Each of the advantages on this slide is mentioned by a small share of every traveller type.

None of the traveller type differences are significant.

Advantage	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Good roads / scenic routes and drives	4%	2%	5%	4%	4%
Lakes / rivers / water	4%	0%	4%	8%	7%
Wildlife	4%	5%	2%	0%	4%
Culture / history / Indigenous heritage	3%	2%	0%	0%	0%
Northern lights / dark skies / stars	3%	3%	0%	0%	4%
Friendly / welcoming people / hospitality	3%	7%	2%	0%	0%
Close to home / easy to get to	2%	0%	0%	1%	8%
Safe destination	2%	1%	0%	3%	2%

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

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

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

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

Younger friend groups are the most likely to give a general positive response (14%).

Advantage	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Fishing	2%	1%	0%	8%	0%
Affordable / good value	1%	1%	2%	0%	0%
Escape from the city / everyday life	1%	1%	2%	0%	0%
Clean environment / fresh air	1%	1%	0%	2%	0%
Forests / trees / fall colours	1%	0%	0%	4%	0%
General positive / vague	7%	10%	7%	14%	3%
Other	3%	5%	6%	0%	0%

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

Base: snowmobilers who provided a response (n=236). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for snowmobiling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (4%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 2)

Snowmobilers who provided a response

Snowmobilers most often describe sustainable tourism as protecting or preserving the environment (26%) and tourism that lasts (20%), followed by supporting the local economy (15%) and benefiting local communities (14%).

Rest of Canada snowmobilers are the most likely to mention supporting the local economy (26%) and respectful travel (21%). None of the market differences are significant.

Meaning	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Protecting / preserving the environment and nature	26%	30%	30%	20%
Tourism that lasts / keeps visitors coming back	20%	18%	21%	19%
Supporting the local economy / businesses	15%	9%	26%	11%
Benefiting / respecting local communities	14%	11%	17%	13%
Respectful / responsible / mindful travel	12%	7%	21%	10%
Good visitor experience (easy, enjoyable, lots to offer)	12%	12%	0%	12%
Minimal impact / not harming or damaging	11%	10%	7%	12%
Leave no trace / leave it as you found it / no litter	8%	9%	3%	9%
Respecting local culture / heritage	7%	2%	13%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=236). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 2)

Snowmobilers who provided a response

Each remaining theme is mentioned by 6% of snowmobilers or fewer, and 8% give a general positive response.

None of the market differences are significant.

Meaning	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
For future generations / so others can enjoy it later	6%	9%	2%	6%
Eco-friendly / green / recycling / less waste	5%	3%	6%	3%
Lower emissions / fuel / energy use	4%	4%	0%	4%
Responsible use of natural resources	4%	2%	2%	4%
Balancing visitors, environment and community	3%	2%	9%	2%
Travelling / exploring / touring (term read literally)	3%	3%	0%	5%
Affordable / budget travel	3%	0%	7%	1%
Protecting wildlife and habitats	1%	2%	0%	2%
General positive / vague	8%	9%	6%	9%
Other	7%	9%	6%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who provided a response (n=236). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (7%) not shown.

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

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

Younger families are the most likely to mention protecting the environment (33%), and older friend groups tourism that lasts (27%) and respectful travel (22%).

None of the traveller type differences are significant.

Meaning	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Protecting / preserving the environment and nature	26%	33%	23%	22%	24%
Tourism that lasts / keeps visitors coming back	20%	15%	9%	26%	27%
Supporting the local economy / businesses	15%	14%	8%	8%	21%
Benefiting / respecting local communities	14%	16%	18%	10%	11%
Respectful / responsible / mindful travel	12%	11%	5%	7%	22%
Good visitor experience (easy, enjoyable, lots to offer)	12%	12%	16%	16%	5%
Minimal impact / not harming or damaging	11%	16%	9%	17%	8%
Leave no trace / leave it as you found it / no litter	8%	7%	9%	4%	13%
Respecting local culture / heritage	7%	2%	4%	6%	13%

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

Base: snowmobilers who provided a response (n=236). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

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

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

Each remaining theme is mentioned by a small share of every traveller type, apart from general positive and other responses.

Meaning	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
For future generations / so others can enjoy it later	6%	5%	2%	3%	11%
Eco-friendly / green / recycling / less waste	5%	4%	2%	2%	6%
Lower emissions / fuel / energy use	4%	4%	0%	1%	9%
Responsible use of natural resources	4%	4%	5%	6%	0%
Balancing visitors, environment and community	3%	2%	3%	11%	0%
Travelling / exploring / touring (term read literally)	3%	3%	2%	10%	1%
Affordable / budget travel	3%	3%	7%	2%	0%
Protecting wildlife and habitats	1%	2%	0%	2%	2%
General positive / vague	8%	7%	12%	5%	12%
Other	7%	5%	14%	8%	7%

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

Base: snowmobilers who provided a response (n=236). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All snowmobilers

Nearly nine in ten snowmobilers (88%) say supporting local, independently owned businesses is important when choosing a destination, followed by conservation (82%) and minimal environmental impact (80%).

Ontario snowmobilers place the most importance on community benefit (94%), and Rest of Canada snowmobilers the least (58%). None of the market differences are significant.

Consideration	Overall (n=235)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Supporting local, independently owned businesses	88%	94%	90%	85%
Conservation and responsible resource management	82%	81%	76%	82%
Minimal environmental impact of tourism in the area	80%	86%	77%	79%
Community benefit – tourism dollars staying in the local community	77%	94%	58%	79%
Learning about Indigenous culture and history	69%	52%	52%	77%
Accessibility for people with mobility or physical needs	69%	72%	65%	68%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=233 to 235). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families place more importance than other traveller types on community benefit (94%).

Older friend groups place the least importance on learning about Indigenous culture and history (44%) and community benefit (56%).

Consideration	Overall (n=235)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Supporting local, independently owned businesses	88%	98%	87%	87%	84%
Conservation and responsible resource management	82%	84%	91%	84%	71%
Minimal environmental impact of tourism in the area	80%	87%	73%	91%	75%
Community benefit – tourism dollars staying in the local community	77%	94% ▲	81%	83%	56%
Learning about Indigenous culture and history	69%	81%	75%	72%	44%
Accessibility for people with mobility or physical needs	69%	81%	66%	67%	52%

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

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=233 to 235). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET

All snowmobilers

Nine in ten snowmobilers (89%) feel a personal responsibility to protect the natural environments they visit, and about three-quarters are interested in contributing to wildlife conservation (78%) or an Indigenous-led guided experience (73%).

Agreement with most statements is lowest among Rest of Canada snowmobilers, although market differences are not significant.

Statement	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
I feel a personal responsibility to protect natural environments I visit	89%	88%	74%	94%
I am interested in contributing to wildlife conservation when I travel	78%	75%	73%	80%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	74%	80%	74%	70%
I would be interested in an Indigenous-led guided experience	73%	67%	54%	81%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	70%	69%	59%	73%
I actively seek out eco-friendly or sustainable travel options	68%	64%	56%	73%
I would pay more for a trip that had a clear conservation benefit	66%	64%	40%	75%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in contributing to wildlife conservation (92%), to look for certified operators (87%) and to pay more for a clear conservation benefit (85%).

Older friend groups are less likely to pay more for a clear conservation benefit (35%) or seek out eco-friendly options (42%).

Statement	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
I feel a personal responsibility to protect natural environments I visit	89%	94%	97%	88%	85%
I am interested in contributing to wildlife conservation when I travel	78%	92% ▲	79%	95%	59%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	74%	88%	77%	69%	64%
I would be interested in an Indigenous-led guided experience	73%	84%	84%	81%	53%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	70%	87% ▲	75%	73%	48%
I actively seek out eco-friendly or sustainable travel options	68%	84%	75%	80%	42% ▼
I would pay more for a trip that had a clear conservation benefit	66%	85% ▲	76%	86%	35% ▼

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

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Snowmobilers who do not live in Northern Ontario

Nine in ten snowmobilers know a lot (50%) or a little (38%) about Northern Ontario.

Rest of Canada snowmobilers are less likely than other markets to know a lot (23%) and more likely to know a little (65%). Ontario snowmobilers are the most likely to know a lot (72%).

Awareness	Overall (n=231)	Ontario (n=32)	Rest of Canada (n=49)	U.S. Drive (n=126)
I have heard of and know a lot about it	50%	72%	23% ▼	56%
I have heard of and know a little bit about it	38%	25%	65% ▲	31%
I have heard of but know nothing about it	10%	3%	8%	11%
I have never heard of before	2%	0%	4%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who do not live in Northern Ontario (n=231). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger families (59%) and older families (56%) are the most likely to know a lot about Northern Ontario.

None of the traveller type differences are significant.

Awareness	Overall (n=231)	Younger Families (n=54)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=55)
I have heard of and know a lot about it	50%	59%	56%	49%	41%
I have heard of and know a little bit about it	38%	30%	34%	49%	41%
I have heard of but know nothing about it	10%	9%	8%	0%	16%
I have never heard of before	2%	2%	3%	2%	2%

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

Base: snowmobilers who do not live in Northern Ontario (n=231). N0 How would you best describe your awareness of Northern Ontario?

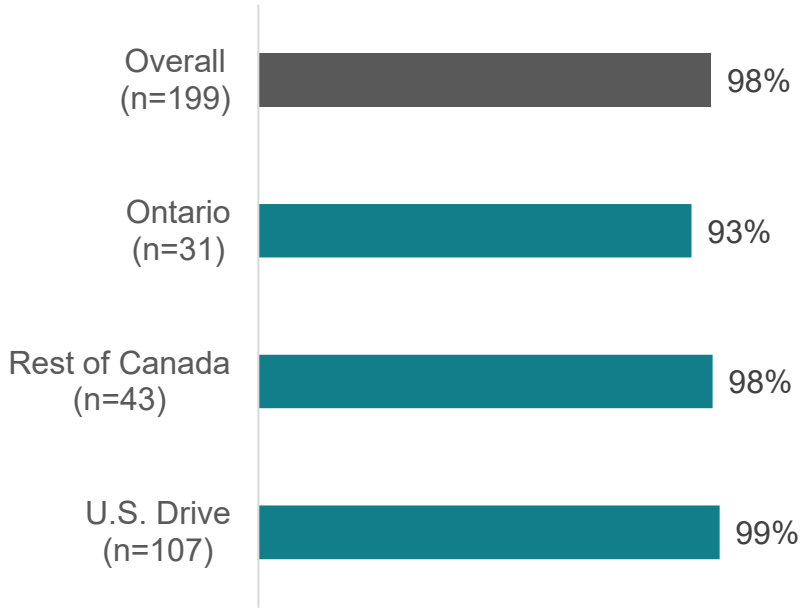
RATING OF NORTHERN ONTARIO FOR SNOWMOBILING

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

Almost all snowmobilers who know Northern Ontario (98%) rate it 4 or 5 out of 5 as a pleasure travel destination for snowmobiling, including six in ten (61%) who rate it excellent.

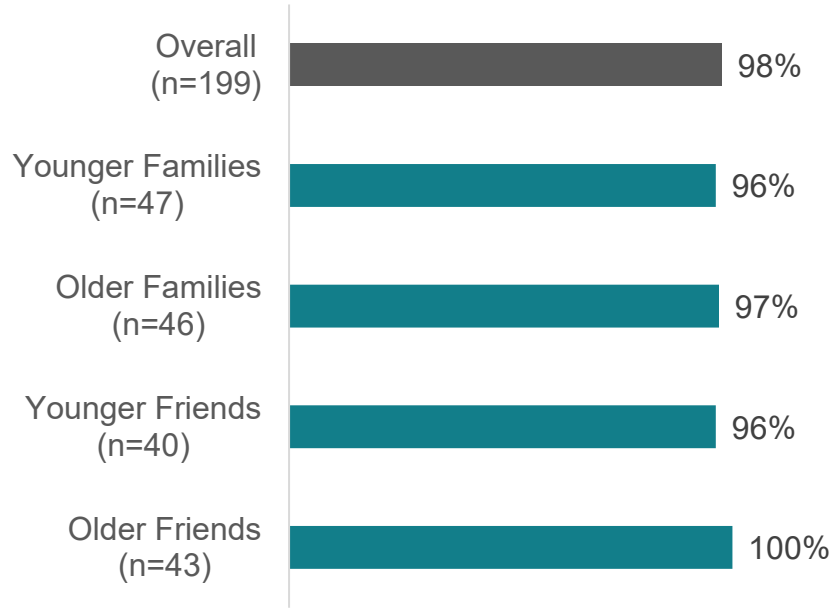
Ratings are 93% or higher in every market and traveller type, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=199). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for snowmobiling? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

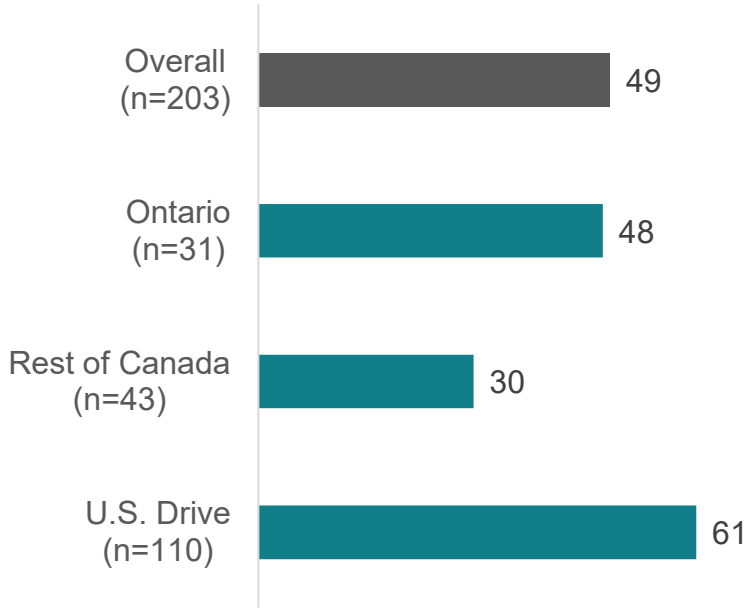
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

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

Northern Ontario has a Net Promoter Score (NPS) of 49 among snowmobilers who know it, with 58% promoters and only 9% detractors.

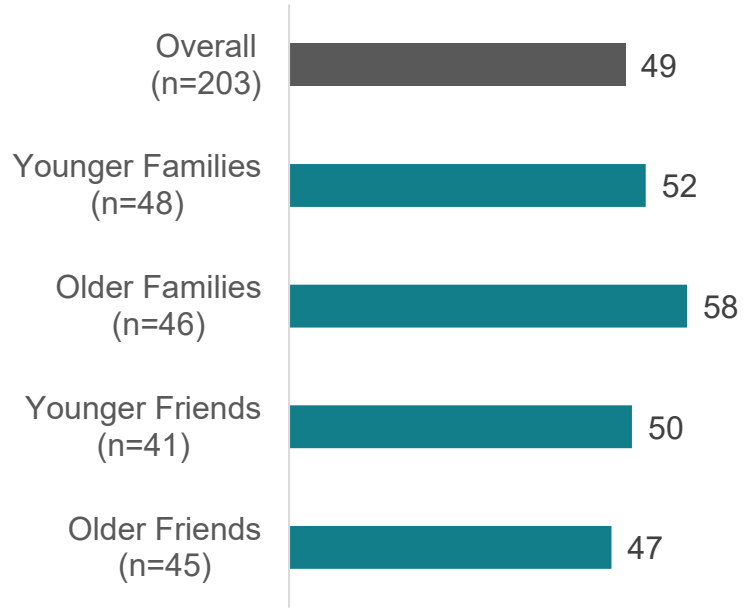
NPS ranges from 30 among Rest of Canada snowmobilers to 61 among U.S. Drive snowmobilers, and from 47 to 58 across traveller types, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who know a lot or a little about Northern Ontario (n=203). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for snowmobiling? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Snowmobilers who know a lot or a little about Northern Ontario

Nine in ten snowmobilers who know Northern Ontario agree it is a destination they would seriously consider (91%) and feels welcoming (90%), and 86% agree it offers excellent snowmobiling experiences.

Rest of Canada snowmobilers are less likely than other markets to agree it offers a wide variety of routes or trails (67%) or excellent snowmobiling experiences (62%), or that it is better than alternatives closer to home (43%).

Statement	Overall (n=203)	Ontario (n=31)	Rest of Canada (n=43)	U.S. Drive (n=110)
Northern Ontario is a destination I would seriously consider for snowmobiling	91%	100%	87%	89%
Northern Ontario feels welcoming to travellers like me	90%	98%	80%	91%
Northern Ontario offers a wide variety of routes, trails, or waterways for snowmobiling	88%	97%	67% ▼	95%
Northern Ontario offers excellent snowmobiling experiences	86%	100%	62% ▼	92%
I know enough about Northern Ontario to plan a snowmobiling trip there	83%	93%	75%	84%
For snowmobiling, Northern Ontario is better than alternatives I could choose closer to home	75%	87%	43% ▼	86%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=198 to 203). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

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

Older friend groups are the least likely to say Northern Ontario is better than alternatives closer to home (52%).

Statement	Overall (n=203)	Younger Families (n=48)	Older Families (n=46)	Younger Friends (n=41)	Older Friends (n=45)
Northern Ontario is a destination I would seriously consider for snowmobiling	91%	95%	100%	89%	83%
Northern Ontario feels welcoming to travellers like me	90%	96%	100%	87%	88%
Northern Ontario offers a wide variety of routes, trails, or waterways for snowmobiling	88%	86%	96%	89%	91%
Northern Ontario offers excellent snowmobiling experiences	86%	95%	86%	90%	86%
I know enough about Northern Ontario to plan a snowmobiling trip there	83%	85%	83%	81%	78%
For snowmobiling, Northern Ontario is better than alternatives I could choose closer to home	75%	88%	87%	87%	52%

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

Base: snowmobilers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=198 to 203). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Snowmobilers who know a lot or a little about Northern Ontario

Nine in ten snowmobilers who know Northern Ontario agree it has pristine lakes and waterways (93%), friendly communities (91%), remote wilderness (91%), Northern Lights opportunities (90%) and excellent groomed snowmobile trails (90%).

Agreement is lowest among Rest of Canada snowmobilers on most attributes, although market differences are not significant.

Northern Ontario has…	Overall (n=202)	Ontario (n=31)	Rest of Canada (n=43)	U.S. Drive (n=110)
Pristine lakes and waterways	93%	98%	93%	93%
Friendly and welcoming local communities	91%	90%	88%	93%
Remote, untouched wilderness	91%	96%	76%	95%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	91%	78%	93%
Excellent groomed snowmobile trails	90%	90%	77%	95%
Authentic campfire and wilderness experiences	88%	82%	76%	94%
Dark skies ideal for stargazing	88%	88%	72%	93%
Good value for money	87%	87%	84%	88%
Rich Indigenous culture and heritage	85%	78%	68%	92%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=195 to 202). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

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

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

Younger families are the most likely to agree Northern Ontario offers good value for money (99%).

Northern Ontario has…	Overall (n=202)	Younger Families (n=48)	Older Families (n=46)	Younger Friends (n=41)	Older Friends (n=45)
Pristine lakes and waterways	93%	96%	92%	87%	96%
Friendly and welcoming local communities	91%	96%	93%	87%	83%
Remote, untouched wilderness	91%	93%	96%	91%	93%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	95%	98%	89%	89%
Excellent groomed snowmobile trails	90%	93%	89%	92%	95%
Authentic campfire and wilderness experiences	88%	96%	92%	88%	84%
Dark skies ideal for stargazing	88%	92%	91%	85%	93%
Good value for money	87%	99%	90%	75%	84%
Rich Indigenous culture and heritage	85%	89%	91%	86%	84%

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

Base: snowmobilers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=195 to 202). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All snowmobilers | Includes past visitors to Northern Ontario

Nearly three-quarters of snowmobilers (73%) view Northern Ontario as a destination of choice for snowmobiling, while 23% see it as a destination of convenience.

Seeing it as a destination of choice ranges from 62% among Rest of Canada snowmobilers to 81% among Ontario snowmobilers. None of the market differences are significant.

View of a trip	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
A destination of choice – somewhere I would specifically seek out for snowmobiling	73%	81%	62%	75%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	23%	19%	34%	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). N10 Which of the following best describes how you would view a snowmobiling trip to Northern Ontario?

"Not sure" (4%) not shown.

VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

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

A destination of choice is the most common view for every traveller type, from 67% among older friend groups to 83% among younger families and younger friend groups.

None of the traveller type differences are significant.

View of a trip	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
A destination of choice – somewhere I would specifically seek out for snowmobiling	73%	83%	74%	83%	67%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	23%	15%	20%	15%	23%

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

Base: all snowmobilers (n=236). N10 Which of the following best describes how you would view a snowmobiling trip to Northern Ontario?

"Not sure" (4%) not shown.



FUTURE DEMAND & EXPERIENCES

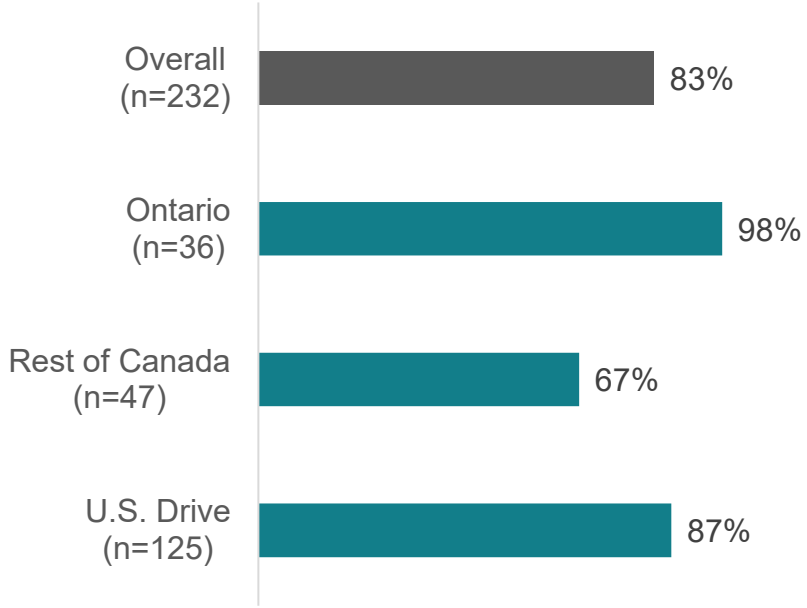
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

More than eight in ten snowmobilers (83%) are likely to visit Northern Ontario for a snowmobiling trip in the next two years, including 65% who are very likely.

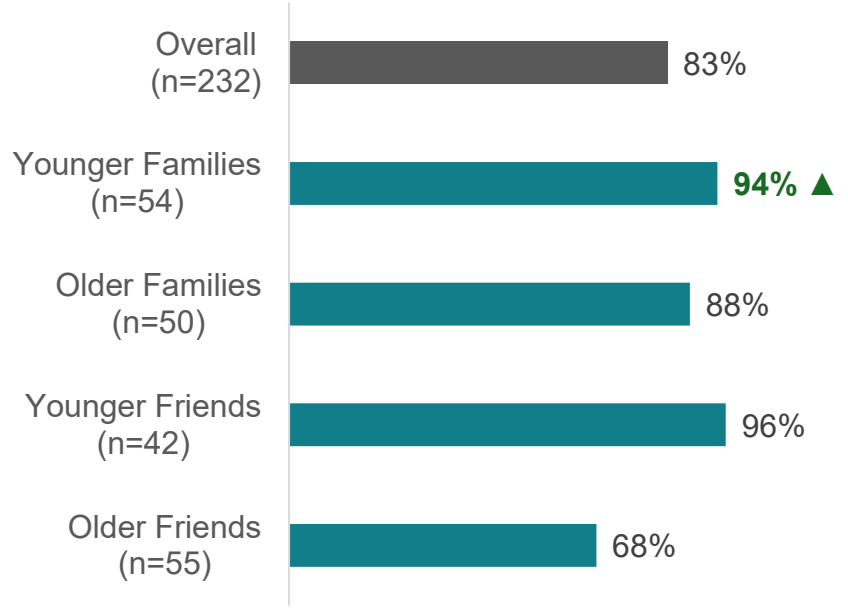
Nearly all Ontario snowmobilers are likely to visit (98%), and they are more likely than other markets to be very likely to (88%). Younger families are more likely than other traveller types to visit (94%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers, excluding “Don’t know” (n=232). N4 (TOP2) How likely are you to visit Northern Ontario for a snowmobiling trip in the next 2 years? TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All snowmobilers | Includes past visitors to Northern Ontario

Three-quarters of snowmobilers would make Northern Ontario the only destination of a snowmobiling trip (30%) or the primary destination with brief stops elsewhere (47%).

U.S. Drive snowmobilers are the most likely to make it the only destination (35%). None of the market differences are significant.

Role of Northern Ontario	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
It would be the only destination of the trip	30%	30%	15%	35%
It would be the primary destination, with brief stops elsewhere	47%	48%	56%	43%
It would be one of several equal destinations	16%	19%	22%	14%
It would be a secondary stop on a trip focused elsewhere	1%	4%	4%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). N5 If you were to visit Northern Ontario for snowmobiling, which of the following best describes the role it would play in your trip?

“Not sure” (6%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Younger families are the most likely to make Northern Ontario the only destination of their trip (37%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
It would be the only destination of the trip	30%	37%	26%	26%	31%
It would be the primary destination, with brief stops elsewhere	47%	44%	52%	49%	40%
It would be one of several equal destinations	16%	19%	8%	23%	12%
It would be a secondary stop on a trip focused elsewhere	1%	0%	6%	0%	0%

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

Base: all snowmobilers (n=236). N5 If you were to visit Northern Ontario for snowmobiling, which of the following best describes the role it would play in your trip?

“Not sure” (6%) not shown.

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

All snowmobilers | Includes past visitors to Northern Ontario

Close to nine in ten or more snowmobilers say each of these factors is important when deciding whether to visit Northern Ontario, led by the quality and condition of trails (93%).

Ontario snowmobilers rate most of these factors highest and Rest of Canada snowmobilers lowest, although market differences are not significant.

Factor	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Quality/condition of routes, trails, or waterways for snowmobiling (e.g., road/trail surface, grooming, water conditions)	93%	96%	94%	92%
Variety and range of snowmobiling routes or areas available	90%	94%	80%	91%
Licensing, registration or permit requirements that are clear and manageable	90%	85%	86%	93%
Cost and overall affordability	90%	92%	91%	91%
Safety and reliability of the destination	89%	94%	82%	91%
Quality of accommodation options	88%	94%	75%	92%
Access to nature and wilderness	88%	96%	83%	87%
Travel time and ease of access	86%	92%	73%	88%
Ability to get away from it all	86%	86%	78%	88%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for snowmobiling? (flattened) TOP2 = % somewhat or very important.

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

All snowmobilers | Includes past visitors to Northern Ontario

Infrastructure (85%), accommodation availability (82%), reputation (82%) and connectivity (81%) are also important to most snowmobilers, while fewer rate activities for non-snowmobiling companions (72%), outfitters or guides (66%), Indigenous cultural experiences (64%) or snowmobiling events (55%) as important.

U.S. Drive snowmobilers place more importance than other markets on outfitters, guides or operators (79%).

Factor	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	85%	96%	79%	87%
More accommodation available during the times I want to visit	82%	75%	73%	88%
Strong reputation or positive word of mouth	82%	92%	68%	86%
Cell phone or internet connectivity at the destination	81%	78%	81%	82%
Availability of activities for non-snowmobiling travel companions	72%	75%	53%	79%
Availability of outfitters, guides, or operators	66%	45%	46%	79% ▲
Indigenous cultural experiences	64%	46%	49%	73%
Snowmobiling events or competitions	55%	48%	41%	60%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for snowmobiling? (flattened) TOP2 = % somewhat or very important.

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

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

The most important factors are rated important by eight in ten or more of every traveller type, with no significant differences.

Older friend groups give some of the highest ratings, including 98% for trail quality, route variety, accommodation quality and travel time.

Factor	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Quality/condition of routes, trails, or waterways for snowmobiling (e.g., road/trail surface, grooming, water conditions)	93%	95%	91%	90%	98%
Variety and range of snowmobiling routes or areas available	90%	93%	89%	92%	98%
Licensing, registration or permit requirements that are clear and manageable	90%	91%	87%	88%	89%
Cost and overall affordability	90%	94%	87%	87%	90%
Safety and reliability of the destination	89%	93%	88%	90%	95%
Quality of accommodation options	88%	94%	85%	87%	98%
Access to nature and wilderness	88%	89%	80%	88%	92%
Travel time and ease of access	86%	88%	81%	87%	98%
Ability to get away from it all	86%	89%	83%	88%	82%

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

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for snowmobiling? (flattened) TOP2 = % somewhat or very important.

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

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

Younger families are more likely than other traveller types to value activities for non-snowmobiling companions (92%) and snowmobiling events (76%).

Older friend groups place less importance on outfitters, guides or operators (36%).

Factor	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	85%	95%	83%	84%	95%
More accommodation available during the times I want to visit	82%	91%	79%	84%	85%
Strong reputation or positive word of mouth	82%	87%	81%	96%	82%
Cell phone or internet connectivity at the destination	81%	87%	76%	78%	82%
Availability of activities for non-snowmobiling travel companions	72%	92% ▲	81%	73%	49%
Availability of outfitters, guides, or operators	66%	80%	77%	81%	36% ▼
Indigenous cultural experiences	64%	78%	74%	64%	39%
Snowmobiling events or competitions	55%	76% ▲	64%	66%	28%

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

Base: all snowmobilers, excluding “Don’t know”; bases vary by item (n=232 to 236). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for snowmobiling? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All snowmobilers

Most snowmobilers (85%) prefer road-accessible areas for a snowmobiling trip to Northern Ontario, while about one in five prefer fly-in or float plane (26%), train-in (21%) or remote boat-in access (20%).

None of the market differences are significant.

Access type	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Road-accessible areas	85%	87%	89%	84%
Fly-in or float plane access	26%	11%	16%	30%
Train-in access	21%	25%	19%	19%
Remote boat-in access	20%	11%	11%	24%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). N7 For a snowmobiling trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (3%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are the most likely to prefer road-accessible areas (98%), and younger families fly-in or float plane access (37%).

None of the traveller type differences are significant.

Access type	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Road-accessible areas	85%	85%	78%	88%	98%
Fly-in or float plane access	26%	37%	34%	22%	15%
Train-in access	21%	29%	25%	29%	9%
Remote boat-in access	20%	26%	32%	16%	10%

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

Base: all snowmobilers (n=236). N7 For a snowmobiling trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (3%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All snowmobilers

Short-term rentals (51%), drive-in lodges or resorts (47%) and hotels or motels (46%) are the most preferred lodging options for a snowmobiling trip to Northern Ontario.

Ontario snowmobilers are the most likely to prefer hotels or motels (53%) and the least likely to prefer drive-in lodges (32%). None of the market differences are significant.

Lodging option	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Short-term rental (e.g., AirBnB, Vrbo)	51%	49%	47%	51%
Drive-in lodge or resort	47%	32%	49%	47%
Hotel or motel	46%	53%	35%	43%
Commercial cottage or cabin rental	41%	40%	39%	42%
Private cottage (owned or borrowed)	36%	41%	30%	36%
Backcountry or wilderness camping	31%	27%	34%	31%
Designated campground (private or provincial park)	20%	16%	24%	20%
Home of friends or relatives (unpaid)	19%	16%	26%	15%
Fly-in or remote outpost camp	16%	3%	9%	20%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). N8 Which of the following lodging options would you prefer on a snowmobiling trip to Northern Ontario? Please select all that apply.

"Not sure" (0%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Older friend groups are the most likely to prefer short-term rentals (62%), and younger families hotels or motels (56%).

None of the traveller type differences are significant.

Lodging option	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Short-term rental (e.g., AirBnB, Vrbo)	51%	56%	43%	39%	62%
Drive-in lodge or resort	47%	47%	45%	42%	41%
Hotel or motel	46%	56%	51%	38%	47%
Commercial cottage or cabin rental	41%	44%	46%	40%	34%
Private cottage (owned or borrowed)	36%	36%	27%	30%	47%
Backcountry or wilderness camping	31%	31%	32%	30%	29%
Designated campground (private or provincial park)	20%	34%	21%	19%	7%
Home of friends or relatives (unpaid)	19%	23%	23%	21%	16%
Fly-in or remote outpost camp	16%	20%	23%	9%	9%

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

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

Base: all snowmobilers (n=236). N8 Which of the following lodging options would you prefer on a snowmobiling trip to Northern Ontario? Please select all that apply.

"Not sure" (0%) not shown.

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

Snowmobilers who have visited Northern Ontario in the past 5 years

Better cell or internet connectivity (40%) would most encourage past-five-year visitors to spend more nights in Northern Ontario, followed by better value for money (33%) and better availability of quality paid accommodation (31%).

Connectivity is cited most by Rest of Canada visitors (67%), and quality paid accommodation by Ontario visitors (45%). None of the market differences are significant.

Factor	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Better cell or internet connectivity	40%	33%	67%	34%
Better value for money overall	33%	35%	38%	28%
Better availability of quality paid accommodation (lodges, hotels, cottages)	31%	45%	9%	34%
More packaged or all-inclusive experiences	28%	16%	43%	26%
Better trail conditions and grooming	26%	37%	7%	27%
Better availability of secure equipment or vehicle storage	24%	15%	39%	23%
More things to do beyond snowmobiling for my travel companions	23%	22%	14%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

Snowmobilers who have visited Northern Ontario in the past 5 years

Fewer than one in five would stay longer for improved access infrastructure (19%), a guided itinerary (16%), Indigenous cultural experiences (16%) or more accommodation availability (15%), and 17% are already satisfied with the length of their stays.

None of the market differences are significant.

Factor	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Improved road, trail, or water access infrastructure	19%	23%	11%	21%
A guided multi-stop itinerary combining activities or sub-regions	16%	17%	9%	14%
Indigenous cultural experiences	16%	4%	0%	24%
More accommodation available during the times I want to visit	15%	17%	10%	15%
Events or competitions timed to my travel	11%	11%	11%	11%
Other	2%	4%	4%	0%
Nothing – I am already satisfied with the length of my stays	17%	16%	12%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

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

Younger families are the most likely to cite better trail conditions and grooming (42%), and older families better connectivity (48%).

None of the traveller type differences are significant.

Factor	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Better cell or internet connectivity	40%	29%	48%	47%	35%
Better value for money overall	33%	39%	28%	43%	32%
Better availability of quality paid accommodation (lodges, hotels, cottages)	31%	36%	41%	33%	17%
More packaged or all-inclusive experiences	28%	34%	22%	27%	9%
Better trail conditions and grooming	26%	42%	24%	36%	12%
Better availability of secure equipment or vehicle storage	24%	30%	29%	19%	20%
More things to do beyond snowmobiling for my travel companions	23%	36%	30%	18%	17%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

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

Older friend groups are the most likely to be already satisfied with the length of their stays (33%).

None of the traveller type differences are significant.

Factor	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Improved road, trail, or water access infrastructure	19%	22%	17%	24%	19%
A guided multi-stop itinerary combining activities or sub-regions	16%	23%	16%	12%	18%
Indigenous cultural experiences	16%	30%	11%	13%	0%
More accommodation available during the times I want to visit	15%	20%	16%	23%	0%
Events or competitions timed to my travel	11%	12%	19%	9%	8%
Other	2%	0%	0%	4%	4%
Nothing – I am already satisfied with the length of my stays	17%	9%	20%	6%	33%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.



BARRIERS & COMPETITION

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

All snowmobilers | Includes past visitors to Northern Ontario

High transportation costs (34%), poor trail grooming or maintenance (32%) and cost (32%) are the most common barriers to visiting or returning to Northern Ontario for snowmobiling.

Rest of Canada snowmobilers are the most concerned about transportation costs (54%) and poor value for money (49%), although market differences are not significant.

Barrier	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
High transportation costs (gas, airfare)	34%	39%	54%	24%
Poor trail grooming or maintenance	32%	38%	38%	29%
Cost	32%	22%	44%	31%
Poor road, trail, or water access	29%	28%	36%	30%
Poor value for money	28%	35%	49%	18%
Unfavourable weather or season timing	25%	37%	22%	22%
Concerns about safety	24%	15%	27%	23%
Wildfires, flooding, or other environmental disruptions	24%	13%	32%	23%
Expensive licensing, registration, or permit requirements	21%	12%	28%	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

All snowmobilers | Includes past visitors to Northern Ontario

About one in five snowmobilers are discouraged by unclear regulations, lack of amenities, poor connectivity or complicated licensing (20% each).

Among U.S. snowmobilers, 24% of U.S. Drive snowmobilers cite anti-American sentiment. None of the market differences are significant.

Barrier	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Unfamiliar or unclear regulations	20%	12%	28%	24%
Lack of amenities or services at the destination	20%	34%	21%	15%
Poor or unreliable cell phone or internet connectivity	20%	28%	29%	13%
Complicated licensing, registration, or permit requirements	20%	12%	24%	19%
Lack of secure equipment or vehicle storage	17%	15%	16%	18%
Limited accommodation options	16%	27%	20%	13%
Anti-American sentiment	16%	–	–	24%
Too far to drive	16%	21%	20%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

All snowmobilers | Includes past visitors to Northern Ontario

Fewer than one in five snowmobilers are discouraged by each of the barriers on this slide, and only 2% say they do not know enough about Northern Ontario's snowmobiling opportunities.

A quarter of U.S. Drive snowmobilers cite border-crossing concerns (25%). None of the market differences are significant.

Barrier	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Difficulty finding reliable trip planning information	16%	19%	18%	14%
Concerns about crossing the Canada-US border	16%	–	–	25%
Too remote or rugged for my comfort level	12%	23%	9%	9%
Not sure the snowmobiling quality would meet my expectations	11%	11%	18%	8%
Insects (e.g., blackflies, mosquitoes)	10%	2%	17%	10%
Vehicle registration or insurance requirements across jurisdictions	7%	0%	5%	10%
Availability of campsites or RV sites	6%	2%	6%	4%
I do not know enough about Northern Ontario's snowmobiling opportunities	2%	0%	2%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

Older friend groups are more likely than other traveller types to be discouraged by poor road, trail or water access (57%), and are the most likely to cite poor trail grooming (55%) and transportation costs (46%).

None of the other traveller type differences are significant.

Barrier	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
High transportation costs (gas, airfare)	34%	21%	21%	27%	46%
Poor trail grooming or maintenance	32%	24%	28%	21%	55%
Cost	32%	27%	31%	35%	34%
Poor road, trail, or water access	29%	28%	11%	17%	57% ▲
Poor value for money	28%	16%	18%	21%	34%
Unfavourable weather or season timing	25%	21%	27%	19%	30%
Concerns about safety	24%	28%	25%	9%	36%
Wildfires, flooding, or other environmental disruptions	24%	14%	24%	18%	36%
Expensive licensing, registration, or permit requirements	21%	14%	13%	17%	40%

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

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Older friend groups are the most likely to cite unclear regulations (42%) and complicated licensing requirements (35%).

None of the traveller type differences are significant.

Barrier	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Unfamiliar or unclear regulations	20%	9%	23%	13%	42%
Lack of amenities or services at the destination	20%	20%	14%	19%	34%
Poor or unreliable cell phone or internet connectivity	20%	13%	22%	23%	25%
Complicated licensing, registration, or permit requirements	20%	15%	21%	10%	35%
Lack of secure equipment or vehicle storage	17%	10%	17%	18%	21%
Limited accommodation options	16%	18%	13%	29%	17%
Anti-American sentiment	16%	8%	25%	17%	18%
Too far to drive	16%	11%	14%	19%	27%

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

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Older friend groups are the most likely to cite difficulty finding reliable trip planning information (31%) and border-crossing concerns (28%).

None of the traveller type differences are significant.

Barrier	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Difficulty finding reliable trip planning information	16%	8%	13%	14%	31%
Concerns about crossing the Canada-US border	16%	5%	13%	14%	28%
Too remote or rugged for my comfort level	12%	9%	18%	12%	13%
Not sure the snowmobiling quality would meet my expectations	11%	5%	13%	8%	18%
Insects (e.g., blackflies, mosquitoes)	10%	8%	9%	9%	11%
Vehicle registration or insurance requirements across jurisdictions	7%	8%	11%	4%	8%
Availability of campsites or RV sites	6%	12%	3%	10%	0%
I do not know enough about Northern Ontario's snowmobiling opportunities	2%	2%	0%	2%	4%

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

Base: all snowmobilers (n=236). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for snowmobiling? Please select all that apply.

"Not sure" (6%) not shown.

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

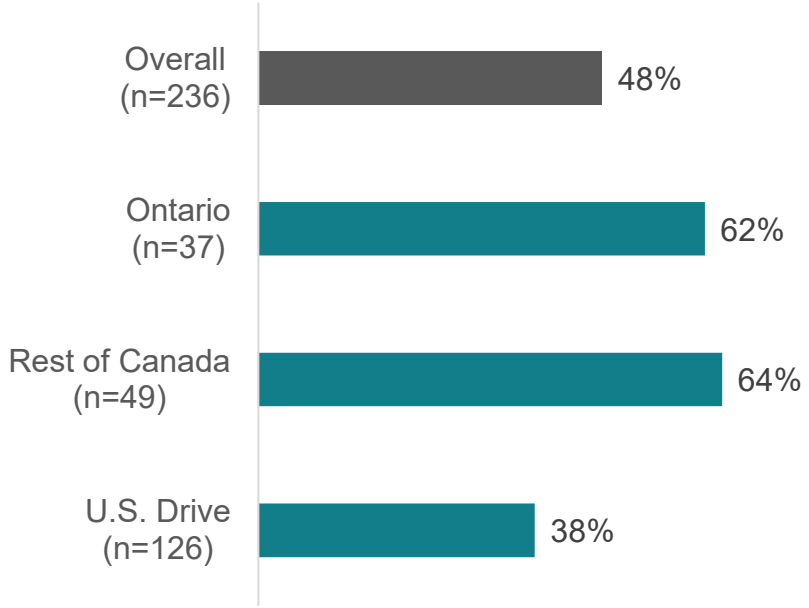
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All snowmobilers | Traveller types are defined on slide 10

Half of snowmobilers (48%) agree that financial pressures have impacted their travel plans in the next 12 months.

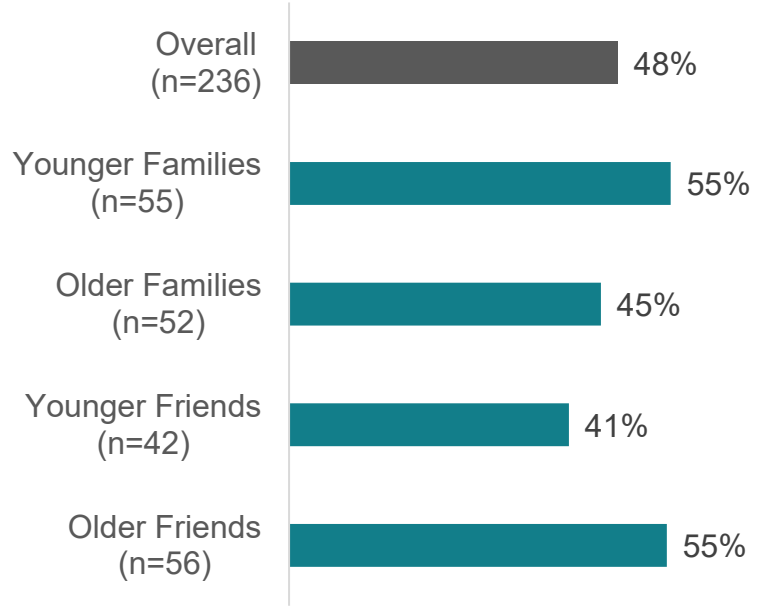
Agreement ranges from 38% among U.S. Drive snowmobilers to 64% among Rest of Canada snowmobilers, and from 41% among younger friend groups to 55% among younger families and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers, excluding “Don’t know” (n=236). BD1A (TOP2) How much do you agree or disagree with the following statement? "Financial pressures have impacted my travel plans in the next 12 months" TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All snowmobilers

Quebec (29%), Michigan (29%), British Columbia (28%) and Colorado (27%) are the destinations snowmobilers most often consider instead of Northern Ontario.

Ontario snowmobilers are more likely than other markets to consider Quebec (54%) and somewhere else in Ontario (53%), and Rest of Canada snowmobilers Manitoba (42%). U.S. Drive snowmobilers most often consider Michigan (48%), Colorado (38%) and Minnesota (34%).

Destination	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Quebec	29%	54% ▲	20%	26%
Michigan	29%	–	–	48%
British Columbia	28%	22%	51%	18%
Colorado	27%	–	–	38%
Somewhere else in Ontario	22%	53% ▲	5%	19%
Minnesota	20%	–	–	34%
Manitoba	19%	7%	42% ▲	14%
Wisconsin	19%	–	–	31%
Alberta	19%	17%	31%	16%
New York	12%	–	–	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). BD2 What other destinations do you consider for snowmobiling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All snowmobilers

Fewer than one in ten snowmobilers consider each of the remaining destinations, and 6% name another destination.

None of the market differences are significant.

Destination	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Saskatchewan	9%	2%	8%	12%
Pennsylvania	9%	–	–	15%
Illinois	7%	–	–	12%
California	6%	–	–	5%
Ohio	5%	–	–	8%
New Jersey	5%	–	–	8%
Indiana	2%	–	–	2%
Texas	2%	–	–	2%
Other	6%	2%	15%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). BD2 What other destinations do you consider for snowmobiling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to consider British Columbia (44%).

Younger friend groups are the most likely to consider somewhere else in Ontario (30%).

Destination	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Quebec	29%	33%	29%	24%	29%
Michigan	29%	28%	40%	25%	29%
British Columbia	28%	44% ▲	42%	12%	18%
Colorado	27%	31%	36%	33%	17%
Somewhere else in Ontario	22%	26%	19%	30%	19%
Minnesota	20%	27%	21%	26%	17%
Manitoba	19%	9%	22%	18%	11%
Wisconsin	19%	19%	14%	19%	28%
Alberta	19%	24%	21%	27%	14%
New York	12%	15%	25%	8%	4%

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

Base: all snowmobilers (n=236). BD2 What other destinations do you consider for snowmobiling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All snowmobilers | Traveller types are defined on slide 10

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

Older friend groups are the most likely to name another destination (15%).

Destination	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Saskatchewan	9%	17%	11%	14%	2%
Pennsylvania	9%	13%	17%	6%	4%
Illinois	7%	11%	14%	4%	3%
California	6%	16%	5%	2%	1%
Ohio	5%	11%	6%	5%	0%
New Jersey	5%	4%	15%	0%	2%
Indiana	2%	6%	2%	0%	1%
Texas	2%	4%	3%	0%	0%
Other	6%	5%	0%	5%	15%

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

Base: all snowmobilers (n=236). BD2 What other destinations do you consider for snowmobiling trips?

"Not sure" (3%) not shown.

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

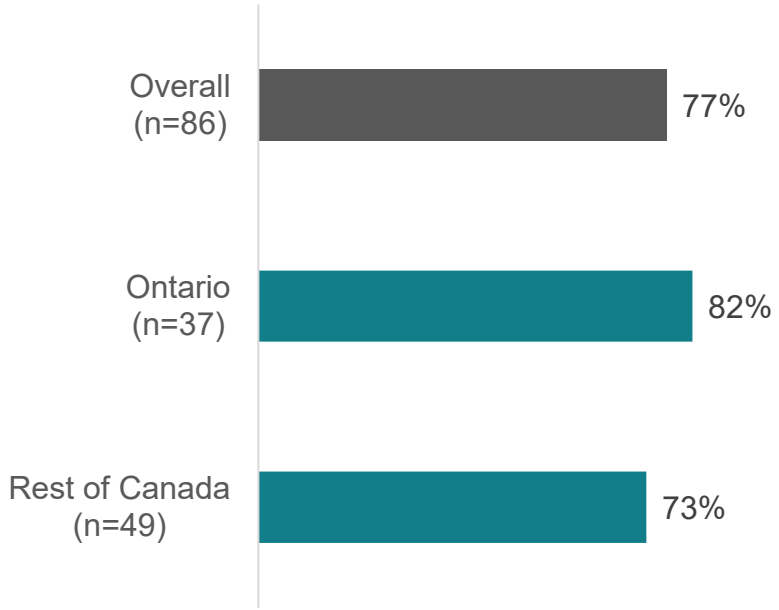
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian snowmobilers | Traveller types are defined on slide 10

Three-quarters of Canadian snowmobilers (77%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 59% who strongly agree.

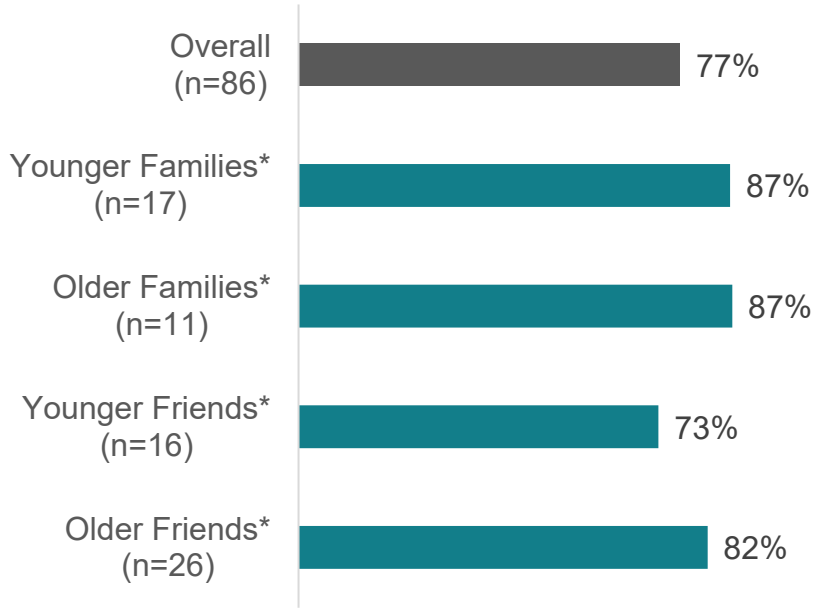
Agreement is 82% among Ontario snowmobilers and 73% among Rest of Canada snowmobilers. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian snowmobilers, excluding “Don’t know” (n=86). BD3A (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

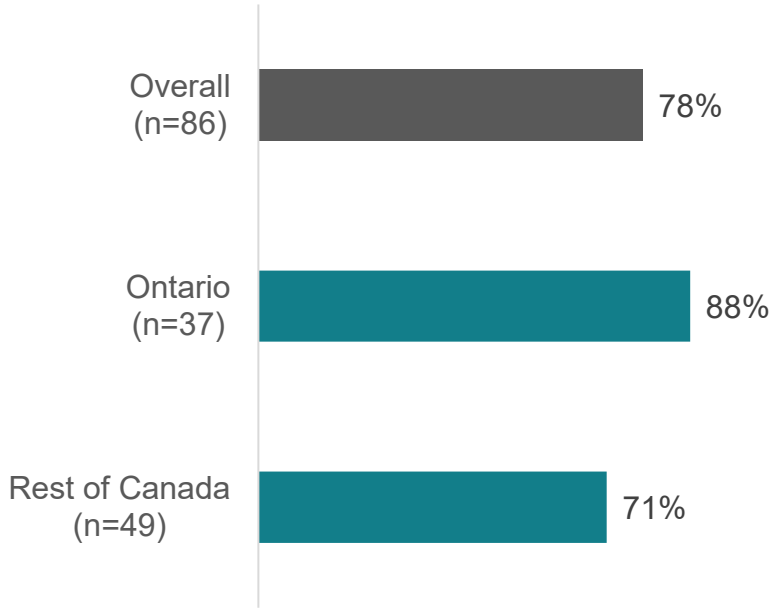
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian snowmobilers | Traveller types are defined on slide 10

Close to eight in ten Canadian snowmobilers (78%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates.

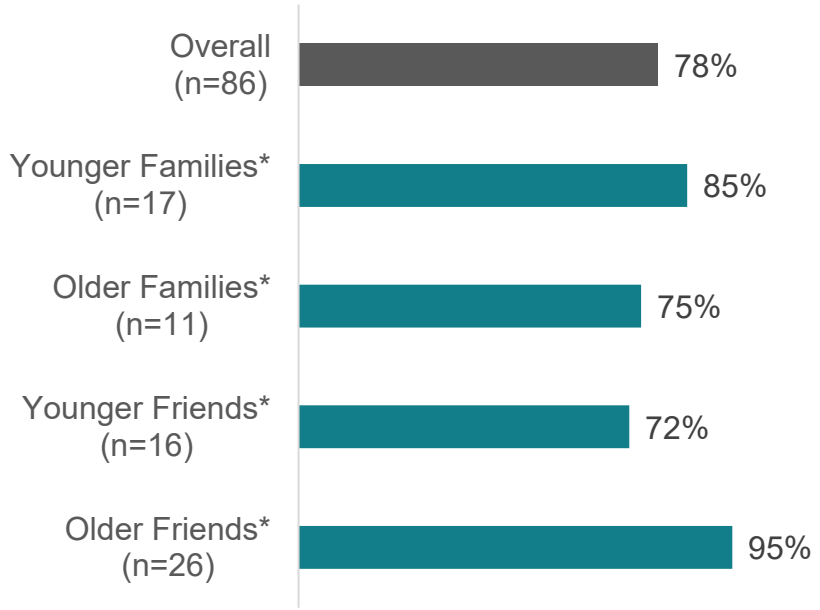
Agreement is 88% among Ontario snowmobilers and 71% among Rest of Canada snowmobilers. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian snowmobilers, excluding “Don’t know” (n=86). BD3B (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

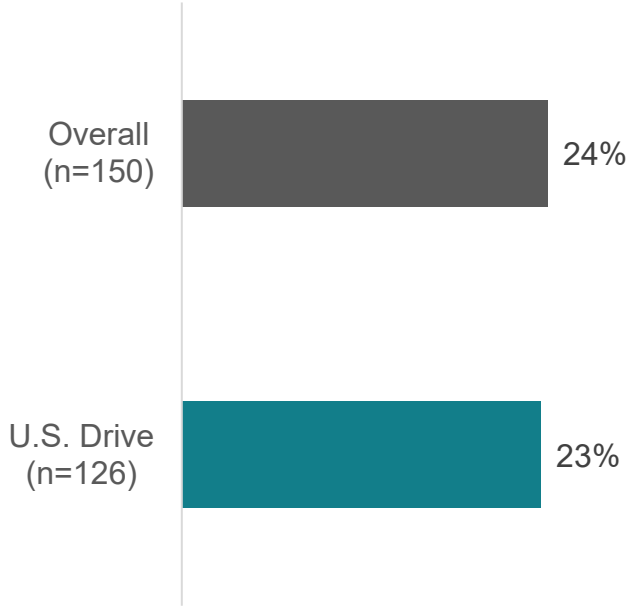
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

U.S. snowmobilers | Traveller types are defined on slide 10

A quarter of U.S. snowmobilers (24%) are concerned about crossing the border to enter Canada, while nearly two-thirds (63%) are not concerned.

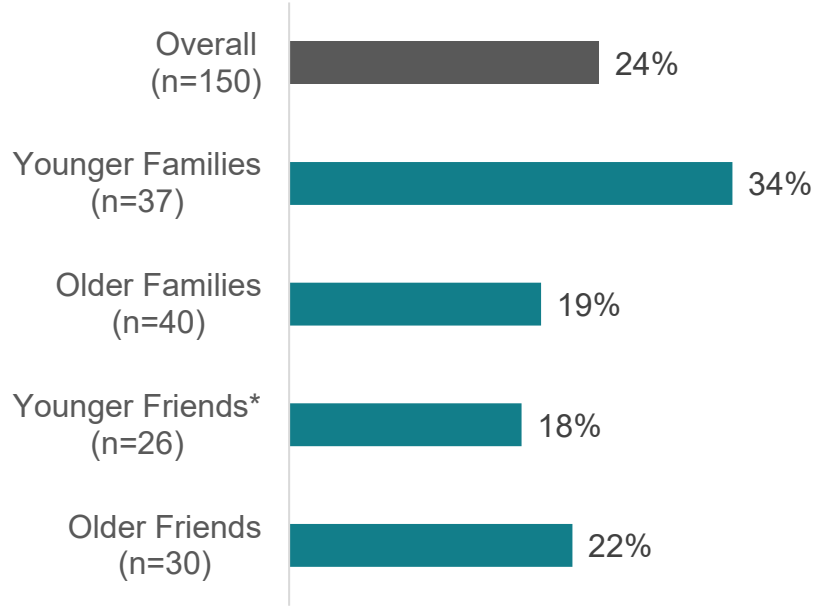
Concern ranges from 18% among younger friend groups to 34% among younger families, with no significant differences. The younger friend group base is small.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. snowmobilers, excluding “Don’t know” (n=150). BD4A (TOP2) [I am concerned about crossing the border to enter Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

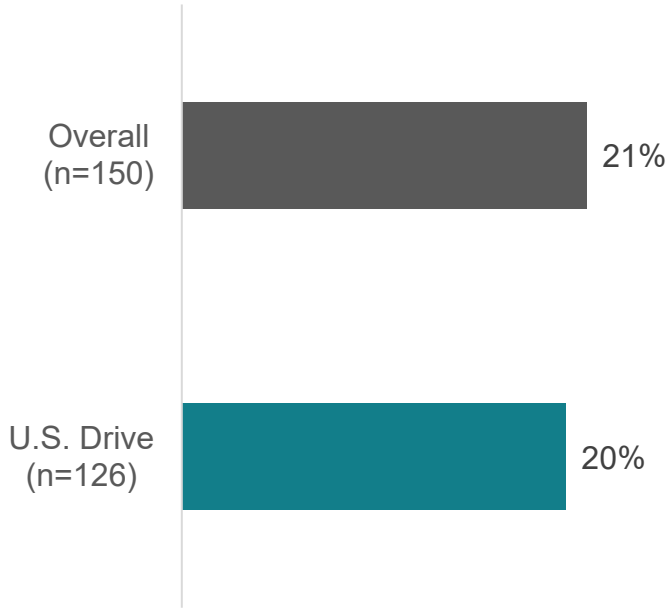
CONCERN ABOUT RETURNING TO THE U.S.

U.S. snowmobilers | Traveller types are defined on slide 10

One in five U.S. snowmobilers (21%) are concerned about crossing the border when returning to the U.S. from Canada, while 65% are not concerned.

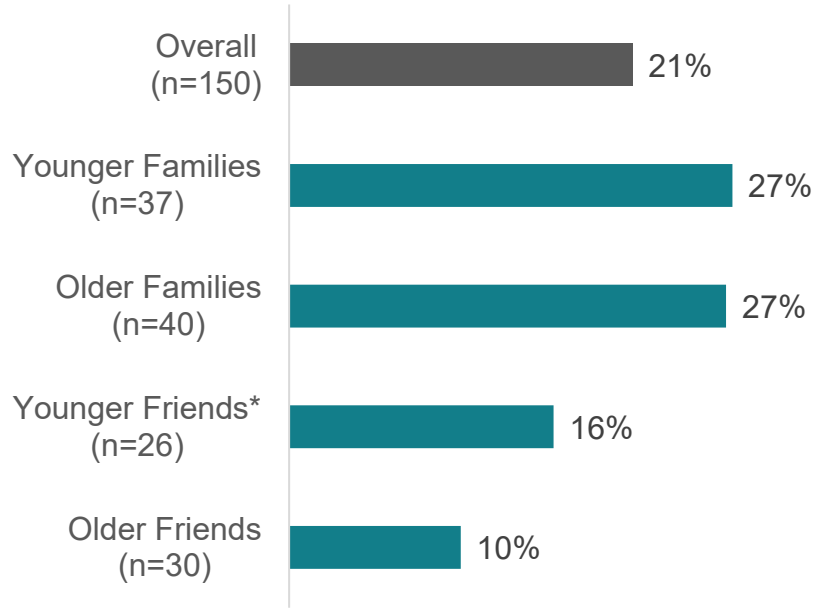
Concern ranges from 10% among older friend groups to 27% among younger and older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. snowmobilers, excluding “Don’t know” (n=150). BD4B (TOP2) [I am concerned about crossing the border returning to the US from Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.