CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

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

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

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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
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 (this 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 All Snowmobilers report.”



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID SNOWMOBILERS

Seven in ten snowmobilers have ridden in Northern Ontario in the past five years, and they are committed, experienced riders. Past visitors are mostly U.S. Drive (53%), Ontario (20%) and Rest of Canada (19%) riders. Six in ten (60%) strongly agree snowmobiling is central to who they are, 67% have children at home, 41% belong to a club and 62% have used a certified trail network such as the OFSC system. Two-thirds (66%) know a lot about the region, and they take 4.9 snowmobiling trips a year. (See slides 18, 44)

Their trips are winter trail trips with paid lodging and trail passes. Visitors have made an average of 4.6 snowmobiling trips to Northern Ontario in five years, mostly in winter (83%). Their most recent trip lasted 4.1 nights. Eight in ten (80%) stayed in paid roofed lodging, most often short-term rentals (37%) or hotels (34%), and 62% bought a trail pass. For most, Northern Ontario was the primary and only destination (54%). (See slides 17, 23, 25, 26, 28, 30, 32)

They rate the trip highly, and connectivity would keep them longer. More than three-quarters (78%) rated their trip better than snowmobiling elsewhere, including 56% much better, rising to 90% of U.S. Drive visitors. Nearly half (45%) are taking more trips than 10 years ago, rising to 62% of younger friend groups. Better connectivity (40%), better value (33%) and quality paid accommodation (31%) would extend their stays, and on their recent trip 41% rented equipment and 37% used a local outfitter or guide. (See slides 19, 20, 30, 34, and slides 131–132 of the All Snowmobilers report)



EXECUTIVE SUMMARY – PAST VISITORS: HOW THEY COMPARE WITH ALL SNOWMOBILERS

PAST NORTHERN ONTARIO VISITORS - AVID SNOWMOBILERS

Past visitors are more committed and know the region better. More past visitors than snowmobilers overall strongly agree that snowmobiling is central to who they are (60% vs. 50%) and know a lot about the region (66% vs. 50%). They are also more likely to have children at home (67% vs. 59%), to have used a certified trail network (62% vs. 55%), to ride performance sleds (58% vs. 51%) and to mix guided and self-guided riding (39% vs. 35%). (See slides 36, 44)

Past visitors share the trail barriers, but cost and rules hold them back less. Past visitors cite transportation costs (33% vs. 34%), grooming (31% vs. 32%) and poor value (27% vs. 28%) at similar rates to snowmobilers overall, pointing to experience-based issues rather than perceptions. They are less likely to cite cost (23% vs. 32%) and complicated permits (15% vs. 20%).

Past visitors are drawn by solitude and packages, and plan less through personal networks. Past visitors are more drawn than snowmobilers overall by solitude (39% vs. 33%) and all-inclusive packages (45% vs. 38%), and less by escape (57% vs. 61%) and bonding (58% vs. 61%). They make more use of social media content (43% vs. 39%) and visitor centres (29% vs. 26%), and less of word of mouth (38% vs. 48%). Almost all past visitors (95%) are likely to visit again, against 83% overall, and 82% see Northern Ontario as a destination of choice, against 73%. (See slides 40, 46)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID SNOWMOBILERS

Reach and advocacy are strong everywhere, so the priorities are product rather than promotion. Close to four in ten snowmobilers (38%) have visited Northeast Ontario, followed by Superior Country (33%), The Great Canadian Wilderness (31%), Sunset Country (29%) and Algoma Country (29%), and Ontario riders concentrate in the Northeast (72%). Net Promoter Scores among region visitors range from +67 to +75, with no region standing out. (See slide 21)

Northeast Ontario and Algoma Country: prioritise grooming and coverage. Grooming concern is highest among riders who visited Northeast Ontario (41%) and Algoma Country (39%), against 27% in The Great Canadian Wilderness, and Algoma riders report the weakest connectivity (33%). Riders who visited these regions are also the most likely to say better trail conditions would extend their stays (31% each, against 21% to 26% elsewhere). The practical priority is grooming and maintenance investment, and trail-side connectivity, on the most-used corridors in these two regions.

Superior Country: add lodging to match top-rated trails. Every Superior Country visitor agrees the region has excellent groomed trails (100%), yet 43% say more quality paid accommodation would extend their stays. The practical priority is quality lodging near trail hubs and promoting early-season riding.

The Great Canadian Wilderness: differentiate the close-to-home product. Riders who visited are the least likely to rate their trip better than elsewhere (67%) and less likely to return (90%), although they cite weather least (14%). The practical priority is giving riders reasons to stay longer or go further, such as packaged loops, events and links to trail networks further north.



PAST EXPERIENCE

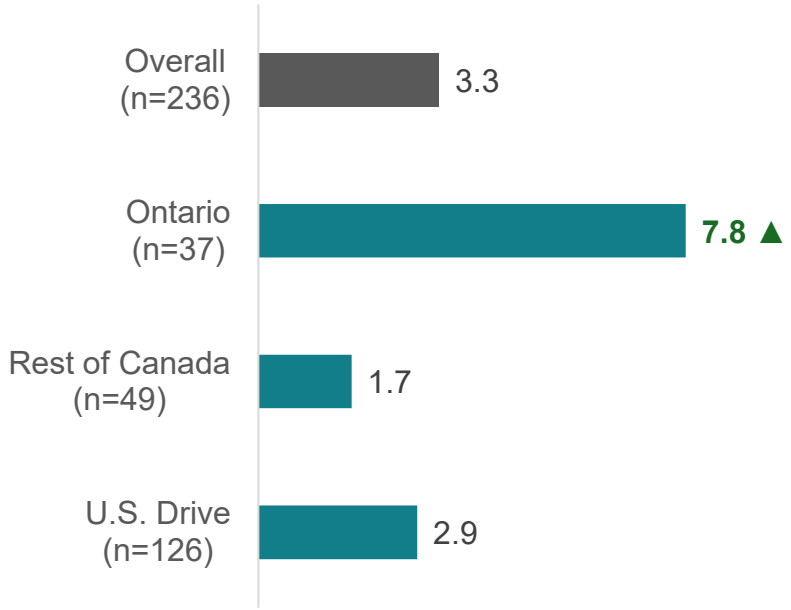
NORTHERN ONTARIO SNOWMOBILING TRIPS IN THE PAST 5 YEARS

All snowmobilers | Traveller types are defined on slide 10

Snowmobilers have taken an average of 3.3 snowmobiling trips to Northern Ontario in the past five years.

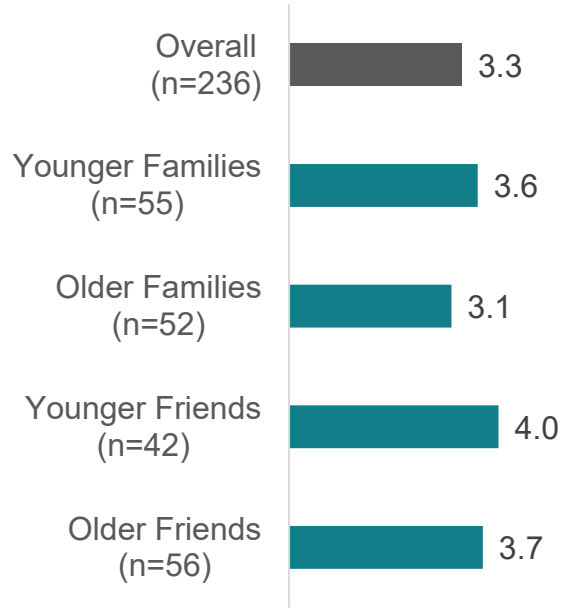
Ontario snowmobilers average more trips than other markets (7.8). Among traveller types, averages range from 3.1 among older families to 4.0 among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for a snowmobiling trip? AVG = average number of trips among all snowmobilers, including those who have not visited.

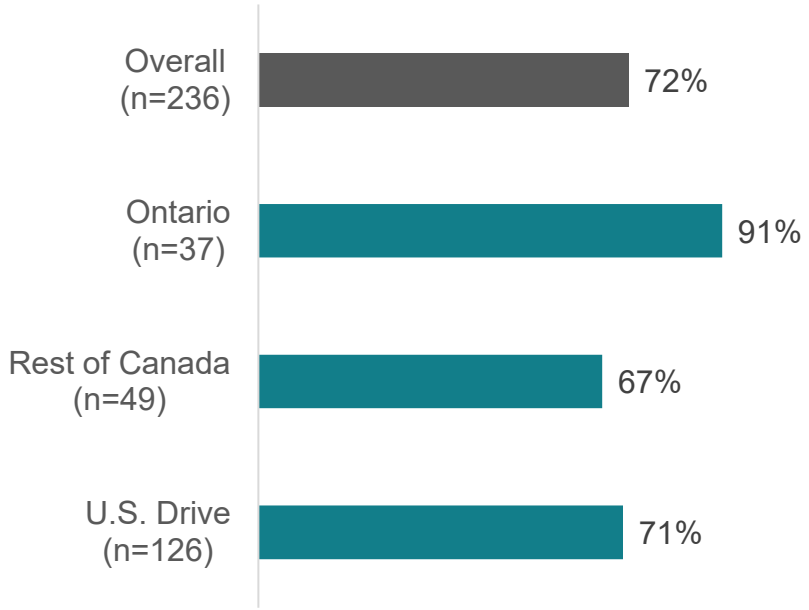
VISITED NORTHERN ONTARIO FOR SNOWMOBILING IN THE PAST 5 YEARS

All snowmobilers | Traveller types are defined on slide 10

Seven in ten snowmobilers (72%) have visited Northern Ontario for a snowmobiling trip in the past five years.

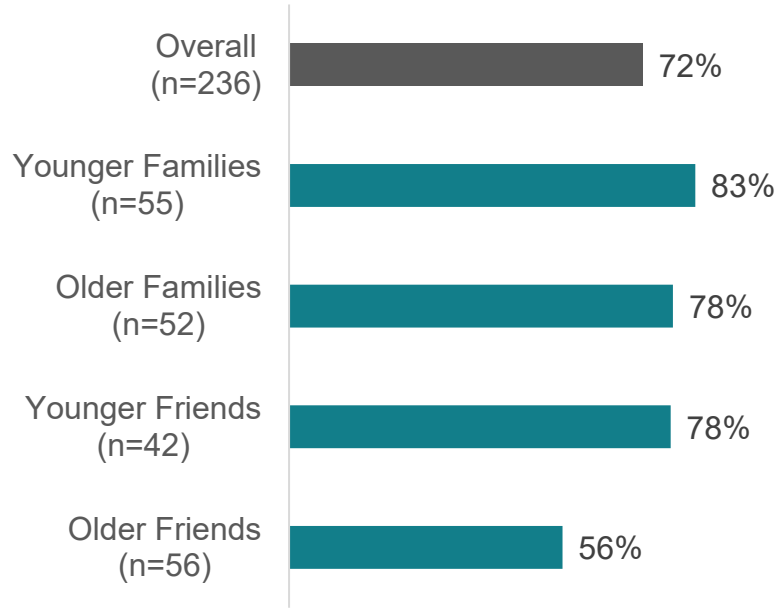
Visits range from 67% among Rest of Canada snowmobilers to 91% among Ontario snowmobilers, and from 56% among older friend groups to 83% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all snowmobilers (n=236). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for a snowmobiling trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

Snowmobilers who have visited Northern Ontario in the past 5 years

Nearly half of past-five-year visitors (45%) take more snowmobiling trips in Northern Ontario than they did 10 years ago, 43% take about the same number and 12% take fewer.

Rest of Canada visitors are the most likely to be taking fewer trips (27%). None of the market differences are significant.

Change in trips	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
I take more trips than I did 10 years ago	45%	45%	35%	51%
About the same as 10 years ago	43%	47%	38%	41%
I take fewer trips than I did 10 years ago	12%	9%	27%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P1B Compared to 10 years ago, how has your participation in snowmobiling trips in Northern Ontario changed?
"Not sure" (0%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

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

Younger friend groups are the most likely to be taking more trips than 10 years ago (62%), and older friend groups the most likely to be taking fewer (25%).

None of the traveller type differences are significant.

Change in trips	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
I take more trips than I did 10 years ago	45%	50%	43%	62%	38%
About the same as 10 years ago	43%	41%	44%	33%	37%
I take fewer trips than I did 10 years ago	12%	9%	14%	5%	25%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P1B Compared to 10 years ago, how has your participation in snowmobiling trips in Northern Ontario changed?
"Not sure" (0%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All snowmobilers

Northeast Ontario is the part of Northern Ontario snowmobilers have most often visited (38%), followed by Superior Country (33%), the Great Canadian Wilderness (31%), Sunset Country (29%) and Algoma Country (29%).

Ontario snowmobilers are more likely than other markets to have visited Northeast Ontario (72%).

Region	Overall (n=236)	Ontario (n=37)	Rest of Canada (n=49)	U.S. Drive (n=126)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	38%	72% ▲	29%	31%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	33%	30%	32%	35%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	31%	37%	41%	27%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	29%	26%	38%	27%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	29%	35%	22%	31%

▲ / ▼ Significantly higher / lower than the other markets

Base: all snowmobilers (n=236). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (0%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited Sunset Country (48%), and are the most likely to have visited Algoma Country (44%).

Older families are the least likely to have visited Sunset Country (22%).

Region	Overall (n=236)	Younger Families (n=55)	Older Families (n=52)	Younger Friends (n=42)	Older Friends (n=56)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	38%	48%	48%	27%	42%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	33%	34%	38%	37%	33%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	31%	39%	27%	29%	29%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	29%	48% ▲	22%	26%	28%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	29%	44%	23%	28%	26%

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

Base: all snowmobilers (n=236). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (0%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

Snowmobilers who have visited Northern Ontario in the past 5 years

Most past-five-year visitors (83%) took their most recent Northern Ontario snowmobiling trip in winter, while 8% travelled in spring and 7% in fall.

Rest of Canada visitors are the most likely to have travelled in spring (20%). None of the market differences are significant.

Season	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Winter (December – February)	83%	92%	78%	83%
Spring (March – May)	8%	4%	20%	4%
Summer (June – August)	2%	4%	0%	3%
Fall (September – November)	7%	0%	3%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P3 Thinking about your most recent Northern Ontario trip that involved snowmobiling, in what season did that trip take place? "Not sure" (0%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Winter is the most common season for the most recent trip in every traveller type, from 78% among younger families to 93% among older friend groups.

None of the traveller type differences are significant.

Season	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Winter (December – February)	83%	78%	84%	89%	93%
Spring (March – May)	8%	5%	6%	7%	0%
Summer (June – August)	2%	5%	3%	0%	0%
Fall (September – November)	7%	11%	6%	4%	7%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P3 Thinking about your most recent Northern Ontario trip that involved snowmobiling, in what season did that trip take place? "Not sure" (0%) not shown.

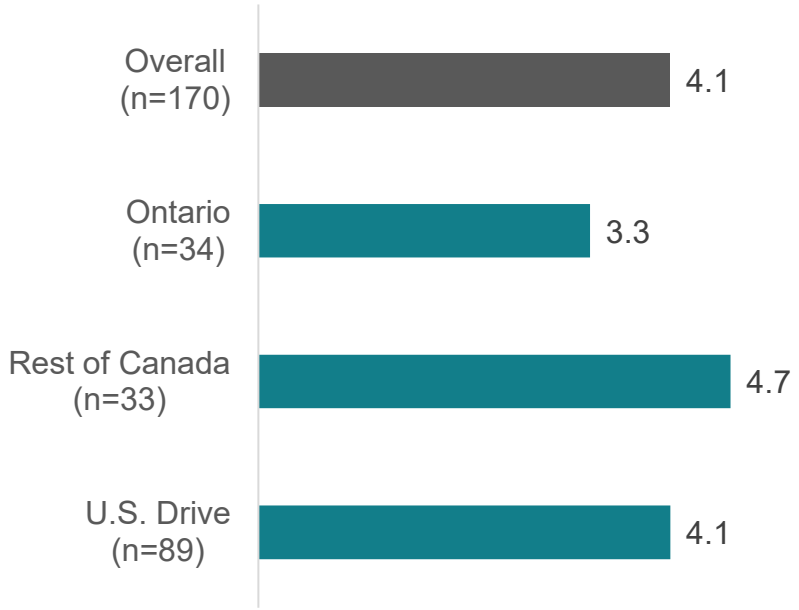
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario snowmobiling trip lasted an average of 4.1 nights.

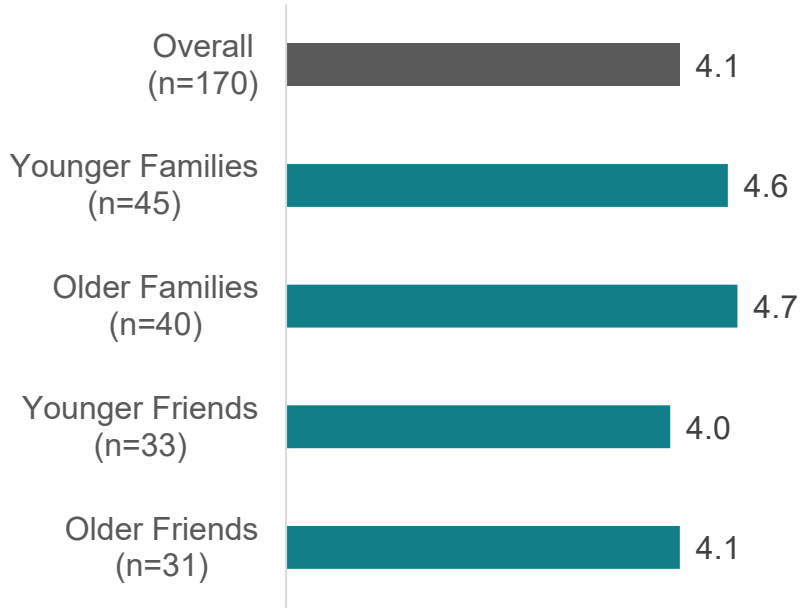
Trip length ranges from 3.3 nights among Ontario visitors to 4.7 among Rest of Canada visitors, and from 4.0 nights among younger friend groups to 4.7 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved snowmobiling, how long was that trip (total nights away from home)? AVG = average number of nights.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

Snowmobilers who have visited Northern Ontario in the past 5 years

Short-term rentals (37%) and hotels or motels (34%) were the most common places to stay on the most recent Northern Ontario snowmobiling trip, followed by commercial cottages, drive-in lodges and backcountry camping (22% each).

Drive-in lodges or resorts are most common among U.S. Drive visitors (31%). None of the market differences are significant.

Accommodation	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Short-term rental (e.g., AirBnB, Vrbo)	37%	37%	36%	36%
Hotel or motel	34%	34%	22%	33%
Commercial cottage or cabin rental	22%	14%	19%	27%
Drive-in lodge or resort	22%	6%	12%	31%
Backcountry or wilderness camping	22%	19%	36%	18%
Private cottage (owned or borrowed)	20%	14%	25%	19%
Designated campground (private or provincial park)	13%	7%	17%	12%
Home of friends or relatives (unpaid)	10%	5%	6%	12%
Fly-in or remote outpost camp	6%	4%	9%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P5 Thinking about your most recent Northern Ontario trip that involved snowmobiling, where did you stay on that trip? Please select all that apply.

"Not sure" (0%) not shown.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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 have used a short-term rental (51%), and younger families a hotel or motel (50%).

None of the traveller type differences are significant.

Accommodation	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Short-term rental (e.g., AirBnB, Vrbo)	37%	44%	39%	34%	51%
Hotel or motel	34%	50%	39%	28%	12%
Commercial cottage or cabin rental	22%	23%	27%	20%	15%
Drive-in lodge or resort	22%	27%	27%	19%	10%
Backcountry or wilderness camping	22%	27%	18%	13%	10%
Private cottage (owned or borrowed)	20%	29%	11%	14%	14%
Designated campground (private or provincial park)	13%	26%	14%	5%	10%
Home of friends or relatives (unpaid)	10%	17%	6%	12%	8%
Fly-in or remote outpost camp	6%	11%	8%	4%	0%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P5 Thinking about your most recent Northern Ontario trip that involved snowmobiling, where did you stay on that trip? Please select all that apply.

"Not sure" (0%) not shown.

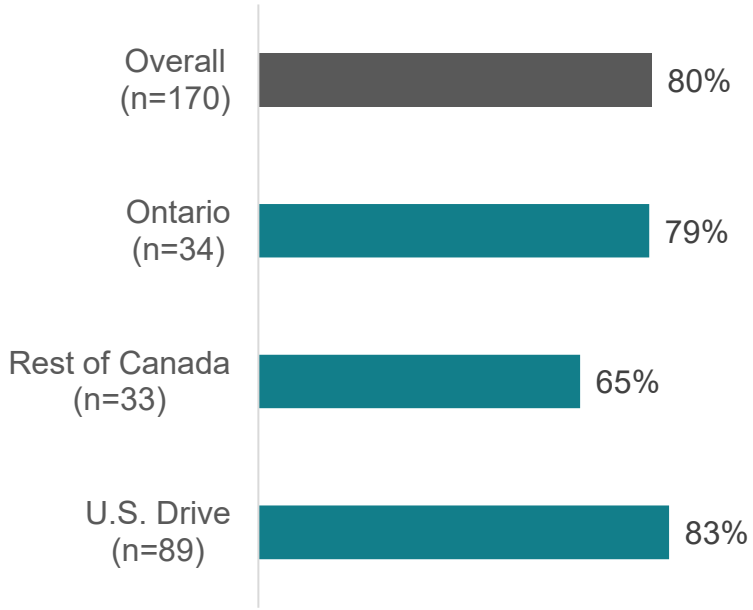
HIGH-YIELD VISITORS

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

Eight in ten past-five-year visitors (80%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

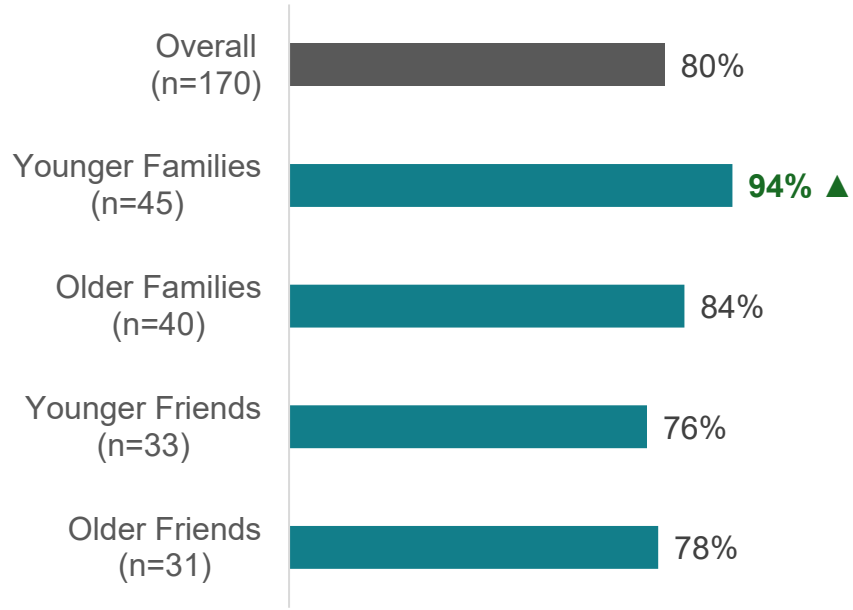
Younger families are more likely than other traveller types to be high-yield visitors (94%). High-yield stays range from 65% among Rest of Canada visitors to 83% among U.S. Drive visitors.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P5_HY Thinking about your most recent Northern Ontario trip that involved snowmobiling, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or short-term rental (P5 codes 1–5).

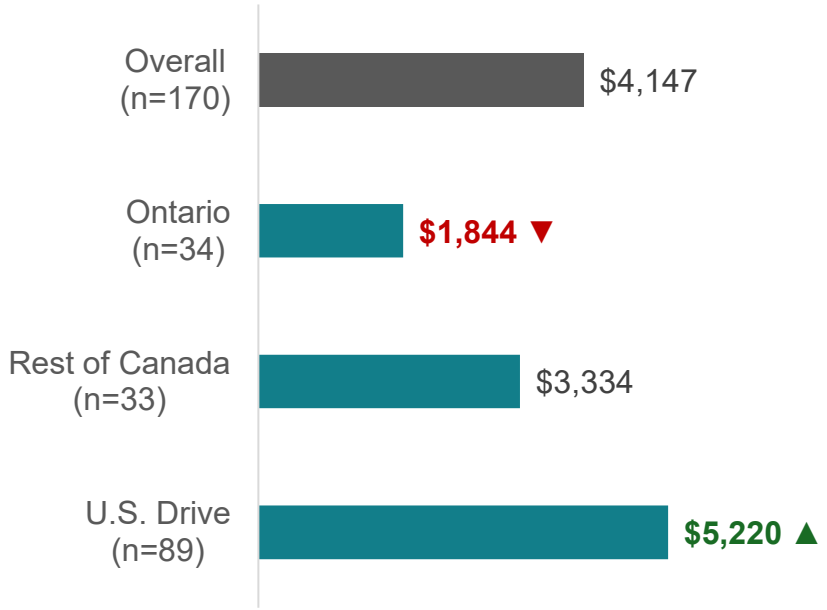
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $4,147 on their most recent Northern Ontario snowmobiling trip.

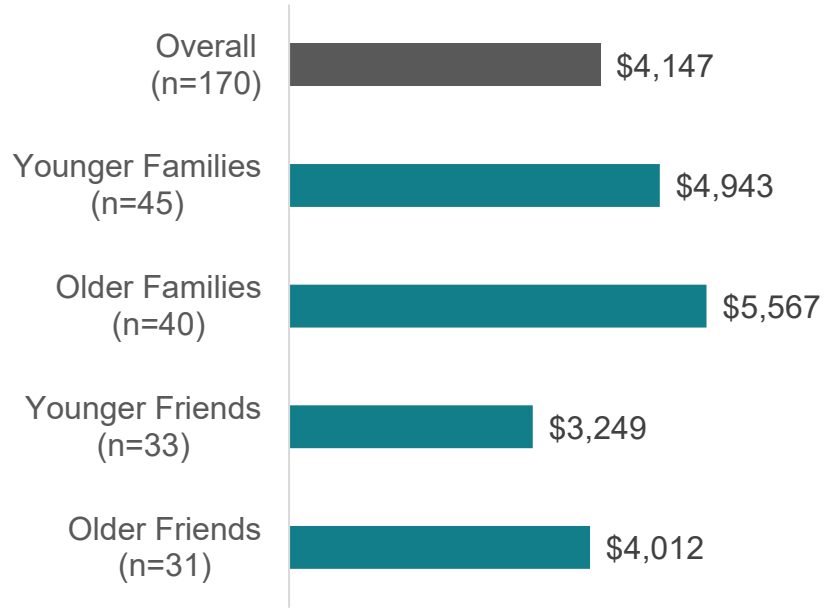
Spending is higher among U.S. Drive visitors ($5,220) and lower among Ontario visitors ($1,844). Among traveller types, spending ranges from $3,249 among younger friend groups to $5,567 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.37.

SERVICES USED ON MOST RECENT TRIP – MARKET

Snowmobilers who have visited Northern Ontario in the past 5 years

Six in ten past-five-year visitors (62%) bought a trail pass or paid a day-use fee on their most recent trip, and about four in ten used equipment or gear rental (41%) or a local outfitter or guide (37%). Only 7% used none of these.

Ontario visitors are more likely than other markets to have used none of these services (25%).

Service	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Trail pass or day-use fee purchase	62%	62%	68%	59%
Equipment or gear rental	41%	27%	35%	44%
Local outfitter or guide service	37%	21%	20%	45%
Packaged experience (e.g., guided snowmobiling package with accommodation, American Plan)	32%	15%	16%	41%
Charter or float plane	11%	5%	8%	14%
None of the above	7%	25% ▲	3%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to have used a packaged experience (52%).

Older friend groups are the most likely to have bought a trail pass or paid a day-use fee (72%) and the least likely to have used gear rental (11%).

Service	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Trail pass or day-use fee purchase	62%	63%	67%	63%	72%
Equipment or gear rental	41%	46%	50%	38%	11%
Local outfitter or guide service	37%	46%	45%	41%	17%
Packaged experience (e.g., guided snowmobiling package with accommodation, American Plan)	32%	52% ▲	34%	30%	20%
Charter or float plane	11%	16%	14%	10%	10%
None of the above	7%	6%	3%	5%	12%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

Snowmobilers who have visited Northern Ontario in the past 5 years

For most past-five-year visitors, Northern Ontario was the primary and only destination (54%) or the main destination with brief stops elsewhere (39%) of their most recent snowmobiling trip.

Ontario visitors are the most likely to say it was the primary and only destination (73%). None of the market differences are significant.

Role of Northern Ontario	Overall (n=170)	Ontario (n=34)	Rest of Canada (n=33)	U.S. Drive (n=89)
Northern Ontario was our primary and only destination	54%	73%	48%	51%
Northern Ontario was the main destination, with brief stops elsewhere	39%	27%	39%	43%
Northern Ontario was one of several equal destinations on the trip	6%	0%	11%	6%
Northern Ontario was a secondary stop on a trip focused elsewhere	<1%	0%	2%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (0%) not shown.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

Younger friend groups are the most likely to say Northern Ontario was their primary and only destination (69%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=170)	Younger Families (n=45)	Older Families (n=40)	Younger Friends (n=33)	Older Friends (n=31)
Northern Ontario was our primary and only destination	54%	58%	50%	69%	53%
Northern Ontario was the main destination, with brief stops elsewhere	39%	36%	47%	19%	35%
Northern Ontario was one of several equal destinations on the trip	6%	6%	3%	10%	12%
Northern Ontario was a secondary stop on a trip focused elsewhere	<1%	0%	0%	2%	0%

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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years (n=170). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (0%) not shown.

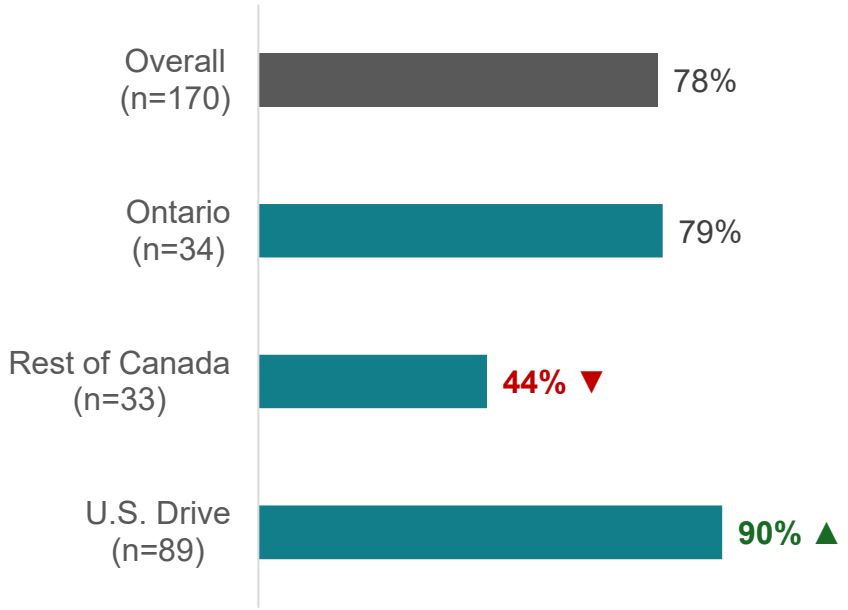
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Close to eight in ten past-five-year visitors (78%) rate their most recent Northern Ontario snowmobiling experience as somewhat or much better than trips taken elsewhere, including 56% who rate it much better.

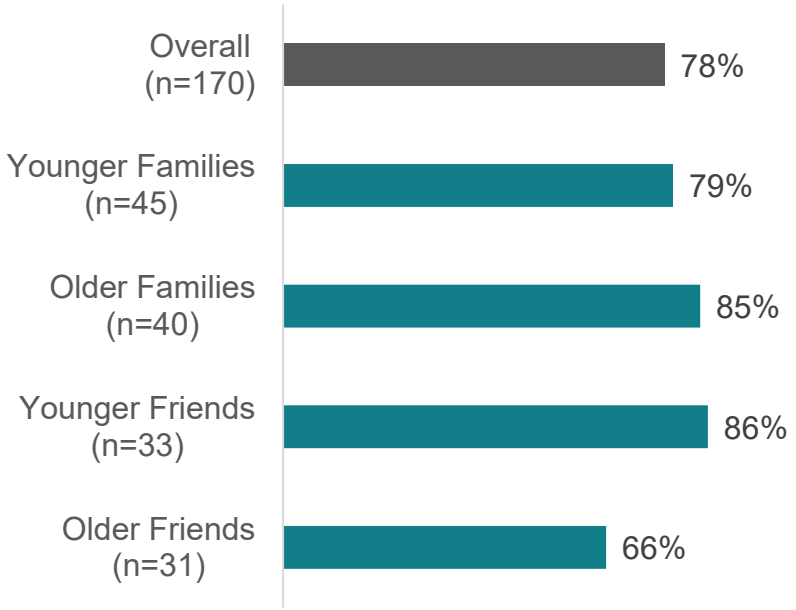
Ratings are higher among U.S. Drive visitors (90%) and lower among Rest of Canada visitors (44%). Among traveller types, ratings range from 66% among older friend groups to 86% among younger friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: snowmobilers who have visited Northern Ontario for snowmobiling in the past 5 years, excluding “Don’t know” (n=170). P8 (TOP2)
Compared to snowmobiling trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better.



PAST VISITORS VS. OVERALL

PAST VISITORS: SNOWMOBILING AS PART OF IDENTITY – MARKET

All snowmobilers

Nine in ten past visitors (89%) agree that snowmobiling and snowmobile culture is a central part of who they are, compared with 83% of snowmobilers overall.

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

Response	Overall (n=236 / 170)	Ontario (n=37 / 34)	Rest of Canada (n=49 / 33)	U.S. Drive (n=126 / 89)
TOP2: Somewhat agree + Strongly agree	83%	82%	60%	91%
	89% ▲	84%	73%	96%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers (n=236; past visitors n=170). 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."

PAST VISITORS: SNOWMOBILING AS PART OF IDENTITY – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Past visitors agree more than snowmobilers overall that snowmobiling is a central part of who they are (89% vs. 83%).

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

Response	Overall (n=236 / 170)	Younger Families (n=55 / 45)	Older Families (n=52 / 40)	Younger Friends (n=42 / 33)	Older Friends (n=56 / 31)
TOP2: Somewhat agree + Strongly agree	83%	96%	91%	80%	79%
	89% ▲	97%	93%	94%	85%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers (n=236; past visitors n=170). 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."

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

snowmobilers who know a lot or a little about Northern Ontario

Past visitors give Northern Ontario an NPS of 63, above the 49 among all snowmobilers who know the region.

Visitor NPS is highest among U.S. Drive visitors (78), although differences within markets are not significant.

Measure	Overall (n=203 / 163)	Ontario (n=31 / 30)	Rest of Canada (n=43 / 33)	U.S. Drive (n=110 / 87)
NPS score	49	48	30	61
	63 ▲	52	41	78

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

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

Base: snowmobilers who know a lot or a little about Northern Ontario (n=203; past visitors n=163). 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).

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

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

Past visitors give Northern Ontario a higher NPS than snowmobilers overall (63 vs. 49).

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

Measure	Overall (n=203 / 163)	Younger Families (n=48 / 42)	Older Families (n=46 / 40)	Younger Friends (n=41 / 33)	Older Friends (n=45 / 31)
NPS score	49	52	58	50	47
	63 ▲	59	65	70	80

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

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

Base: snowmobilers who know a lot or a little about Northern Ontario (n=203; past visitors n=163). 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).

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

All snowmobilers

Almost all past visitors (95%) are likely to visit Northern Ontario for snowmobiling in the next two years, compared with 83% of snowmobilers overall.

U.S. Drive visitors are more likely than their market overall to return (98% vs. 87%), and every Ontario visitor says they are likely to visit (100%).

Response	Overall (n=232 / 170)	Ontario (n=36 / 34)	Rest of Canada (n=47 / 33)	U.S. Drive (n=125 / 89)
TOP2: Somewhat likely + Very likely	83%	98%	67%	87%
	95% ▲	100%	80%	98% ▲

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers, excluding “Don’t know” (n=232; past visitors n=170). N4 (TOP2) How likely are you to visit Northern Ontario for a snowmobiling trip in the next 2 years?

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

All snowmobilers | Traveller types are defined on slide 10

Past visitors are more likely than snowmobilers overall to visit in the next two years (95% vs. 83%), with 95% or more of visitors in every traveller type saying so.

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

Response	Overall (n=232 / 170)	Younger Families (n=54 / 45)	Older Families (n=50 / 40)	Younger Friends (n=42 / 33)	Older Friends (n=55 / 31)
TOP2: Somewhat likely + Very likely	83%	94%	88%	96%	68%
	95% ▲	100%	95%	100%	100%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers, excluding “Don’t know” (n=232; past visitors n=170). N4 (TOP2) How likely are you to visit Northern Ontario for a snowmobiling trip in the next 2 years?

PAST VISITORS: IMPORTANCE OF CERTIFICATION – MARKET

All snowmobilers

Nearly nine in ten past visitors (87%) say recognized certification or designation is important, compared with 77% of snowmobilers overall.

U.S. Drive visitors place more importance on certification than their market overall (93% vs. 81%).

Response	Overall (n=236 / 170)	Ontario (n=37 / 34)	Rest of Canada (n=49 / 33)	U.S. Drive (n=126 / 89)
TOP2: Somewhat important + Very important	77%	83%	59%	81%
	87% ▲	81%	74%	93% ▲

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers, excluding “Don’t know” (n=236; past visitors n=170). 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)?

PAST VISITORS: IMPORTANCE OF CERTIFICATION – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Past visitors place more importance on certification than snowmobilers overall (87% vs. 77%).

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

Response	Overall (n=236 / 170)	Younger Families (n=55 / 45)	Older Families (n=52 / 40)	Younger Friends (n=42 / 33)	Older Friends (n=56 / 31)
TOP2: Somewhat important + Very important	77%	92%	73%	80%	69%
	87% ▲	95%	88%	86%	91%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers, excluding “Don’t know” (n=236; past visitors n=170). 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)?

PAST VISITORS: AWARENESS OF NORTHERN ONTARIO – MARKET

Snowmobilers who do not live in Northern Ontario

Two-thirds of past visitors (66%) know a lot about Northern Ontario, compared with half of snowmobilers overall (50%), and very few know nothing beyond the name (2% vs. 10%).

U.S. Drive visitors show the same pattern compared with their market overall (75% vs. 56% know a lot).

Awareness	Overall (n=231 / 167)	Ontario (n=32 / 30)	Rest of Canada (n=49 / 33)	U.S. Drive (n=126 / 89)
I have heard of and know a lot about it	50%	72%	23%	56%
	66% ▲	77%	29%	75% ▲
I have heard of and know a little bit about it	38%	25%	65%	31%
	32%	23%	71%	22% ▼
I have heard of but know nothing about it	10%	3%	8%	11%
	2% ▼	0%	0%	2% ▼
I have never heard of before	2%	0%	4%	1%
	<1%	0%	0%	1%

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

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

Base: snowmobilers who do not live in Northern Ontario (n=231; past visitors n=167). N0 How would you best describe your awareness of Northern Ontario?

PAST VISITORS: AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Past visitors are more likely than snowmobilers overall to know a lot about Northern Ontario (66% vs. 50%).

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

Awareness	Overall (n=231 / 167)	Younger Families (n=54 / 45)	Older Families (n=52 / 40)	Younger Friends (n=42 / 33)	Older Friends (n=55 / 31)
I have heard of and know a lot about it	50%	59%	56%	49%	41%
	66% ▲	70%	67%	60%	67%
I have heard of and know a little bit about it	38%	30%	34%	49%	41%
	32%	25%	31%	40%	33%
I have heard of but know nothing about it	10%	9%	8%	0%	16%
	2% ▼	4%	2%	0%	0%
I have never heard of before	2%	2%	3%	2%	2%
	<1%	2%	0%	0%	0%

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

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

Base: snowmobilers who do not live in Northern Ontario (n=231; past visitors n=167). N0 How would you best describe your awareness of Northern Ontario?

PAST VISITORS: VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All snowmobilers

Eight in ten past visitors (82%) see Northern Ontario as a destination of choice for snowmobiling, compared with 73% of snowmobilers overall.

U.S. Drive visitors are more likely than their market overall to see it as a destination of choice (84% vs. 75%).

View of a trip	Overall (n=236 / 170)	Ontario (n=37 / 34)	Rest of Canada (n=49 / 33)	U.S. Drive (n=126 / 89)
A destination of choice – somewhere I would specifically seek out for snowmobiling	73%	81%	62%	75%
	82% ▲	86%	67%	84% ▲
A destination of convenience – somewhere I might go if it happens to fit my travel plans	23%	19%	34%	21%
	18%	14%	33%	15%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers (n=236; past visitors n=170). N10 Which of the following best describes how you would view a snowmobiling trip to Northern Ontario?
"Not sure" (4%) not shown.

PAST VISITORS: VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

All snowmobilers | Traveller types are defined on slide 10

Past visitors are more likely than snowmobilers overall to see Northern Ontario as a destination of choice (82% vs. 73%).

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

View of a trip	Overall (n=236 / 170)	Younger Families (n=55 / 45)	Older Families (n=52 / 40)	Younger Friends (n=42 / 33)	Older Friends (n=56 / 31)
A destination of choice – somewhere I would specifically seek out for snowmobiling	73%	83%	74%	83%	67%
	82% ▲	83%	89%	80%	96%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	23%	15%	20%	15%	23%
	18%	15%	11%	20%	4%

All snowmobilers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all snowmobilers (n=236; past visitors n=170). N10 Which of the following best describes how you would view a snowmobiling trip to Northern Ontario?
"Not sure" (4%) not shown.