

Summary Research Report

Case Studies of Canada's Icon Trail Systems

Completed by Transportation Options

www.transportationoptions.org

Based on research completed by: Ryerson University, Designated Cycling Routes, Tourism Impact and Opportunities, unpublished research study prepared E.Chang, A.Cho, J.Colatosti, M.Yiu, K. Zhi for Transportation Options, 2013.

Canadian provinces have a number of iconic trail systems that appeal to cycle tourists. Most incorporate recreational and multi-use trail systems, some are solely using a network of road routes. Each trail or route is unique with differing landscapes, infrastructure, governance and funding structures.

Four relevant Canadian case studies summarized on the following pages are based on an unpublished report commissioned by Transportation Options and prepared by Ryerson University.¹ The case studies are:

- Cabot Trail, Cape Breton Island, Nova Scotia,
- Confederation Trail, Prince Edward Island,
- Galloping Goose Regional Trail, British Columbia,
- La Route Verte^{2,3 4} and La Véloroute des Bleuets.

The following points are common to these trail systems:

- The development of trails and routes are multi-year projects, some having been established decades ago.
- Funding to develop trails and routes comes from a variety of sources, primarily public sector funds and grants. Municipalities contribute annually to maintenance and special projects.
- Many trails have been co-designated with the Trans Canada Trail, and often benefit from capital infrastructure investments associated with the development of the Trans Canada Trail.
- Trails have a designated coordinating organization or agency.
- Developed routes have operators offering cycling tours and packages.
- Cycling tours are most frequently purchased by recreational types of cyclists.
- Out of province, US or international visitors use trails and purchase cycling tours.
- Trail users account for a large amount of annual visitor spending.
- Businesses and communities servicing trail users are experiencing positive financial benefits.
- Trails are marketed using a variety of promotions. Each trail has a strong on-line marketing presence with detailed information housed on trail-specific websites.
- The regional and provincial tourism agencies play active roles in marketing of trails.

¹ Ryerson University, Designated Cycling Routes, Tourism Impact and Opportunities, unpublished research study prepared E.Chang, A.Cho, J.Colatosti, M.Yiu, K. Zhi for Transportation Options, 2013.

² http://www.velo.qc.ca/files/file/vq/VQ_EV2010_en.pdf Velo Quebec. Bicycling in Quebec. 2010.

³ http://www.routeverte.com/rv/retombees_e Velo Quebec. Economic Spin-Off's. Webpage

⁴ www.veloquebec.info/documents/bicyclingquebec2005-en.pdf Bicycling in Quebec 2005

Cabot Trail, Cape Breton, Nova Scotia

Description

- The Cabot Trail is a 300 km loop highway road route located in Cape Breton, Nova Scotia.
- The Trail is world renowned for its beautiful scenic ocean views and also provides visitors a way to experience the unique Gaelic and Acadian cultures in Nova Scotia.
- Although not designated as a cycling route the Trail has been deemed one of the world's top ten cycling destinations by Lonely Planet.

Trail Funding & Development

- Trail development was originally funded by the Government of Canada and organized by the Cabot Trail Working Association, a non-profit organization.
- The Cabot Trail Working Association has been successful raising funds to improve view-planes in strategic trail locations and enhance general information signage.
- Beginning in 2010 and ongoing is the *Cabot Trail Facade and Streetscape Program*, with the primary purpose of encouraging the growth and long-term economic spinoff for the communities near the trail area. The fund provides a 50% cost-sharing incentive to allow accommodation and retail owners to renovate their storefront, increasing curb side appeal for trail users. This program is funded by business participants, Enterprise Cape Breton Corporation, Nova Scotia Economic and Rural Development and Tourism for a total of \$1.5 million to date. The Trail working group, community, municipal and regional partners play a role in overseeing program.

Demographics of Users and Tours

- Cycling tour packages are sold primarily to recreational cyclists, followed by touring and expert cyclists, and lastly family and leisure travellers.
- Equal numbers of female and male visitors aged 46-55 years of age purchase cycling tour packages.
- Tour packages are primarily purchased by international travellers, mainly from the United States, with a few from Australia and the United Kingdom; 30% of packages are purchased from visitors within Canada; only 2-4% of locals within the province buy packages. The most popular cycling packages are for 5 days and 4 nights.

Marketing the Cabot Trail

- The Cabot Trail is actively promoted as a destination for cycle, motorcycle and auto tours by Nova Scotia Tourism.
- The Cabot Trail does most of its promotional and marketing initiatives on-line; however the route is also marketed through magazine ads, newsletters (American Bicyclist) and Facebook.
- Tour companies do additional promotions selling cycling tour packages.

Tourism and Economic Benefits

- In 2010, 2% or 40,000 visitors cycled while in Nova Scotia and they spent an average of approximately \$98 per person per day during their visit.
- Businesses associated with the Cape Breton facade improvement experienced an average 15-20% increase in business traffic and revenue, some businesses experienced

a 50% increase in business traffic and revenue.

- A 2005 study of 18 Nova Scotia tour companies found the estimated total revenue from cycling tours during a 7 week period was over \$1.23 million.

Confederation Trail, Prince Edward Island

Description

- This 400 km converted recreational rail trail transverses Prince Edward Island (PEI) and is a part of the Trans Canada Trail.
- The multi-use trail is primarily rolled hard packed stone dust surface and is extremely popular with cyclists.
- There are many villages, attractions and services lining or within close proximity of the trail.

Trail Funding & Development

- The Confederation Trail is part of the Trans Canada Trail and as such has received funding from the Government of Canada, through the Tourism division of Atlantic Canada Opportunities Agency.
- With a \$1 million donation from the W. Garfield Weston Foundation and an additional \$400,000 from Trans Canada Trail, an additional 30 kilometers stretch will be completed in 2014.

Demographics of Users and Tours

- Recreational cyclists purchase the most cycling tour packages, most travelling as couples, followed by families and then singles. Competitive cyclists are the least likely to purchase cycling tour packages on this trail. Tour purchasers are primarily 46-55 years of age with an equal split between females and males.
- 45% of tours are purchased by international visitors, 40% by residents within Canada, and only 15% by locals within the province.
- The most popular cycling packages are 5 days and 4 nights long. Peak tour months are June, July and August.

Marketing the Confederation Trail

- The Confederation Trail is actively promoted as a cycling destination by Prince Edward Island Tourism
- In 2011, the Government of Canada, through the Tourism division of Atlantic Canada Opportunities Agency plus provincial and regional partners provided \$340,000 to fund an initiative to provide marketing funds to Atlantic Canada Trail Association to promote east coast trails as tourism and recreation destinations.
- Tour companies actively promote cycle package sales.

Tourism and Economic Benefits

- Of a total of 33,081 trail trips captured at three survey locations on the Confederation Trail between June to September 2012, 63% or 20,864 trips were made by cyclists. 59% of all trail users were estimated to be visitors to the province.
- 29% of the total amount spent on the visitor's duration of the trip is attributed to trail related businesses and activities. Businesses within 30 minutes of the trail received 25%

of total visitor spending on trail related activities.

- Of trail users total spending estimated at \$2,757,995 in 2012, \$2.1 million was generated within 30 minutes of the trail, and cyclists spending contributed 68% to that total amount.
- Of total spending 27% was generated from accommodations and camping, 21% from restaurants, 13% from recreation and entertainment, 31% from general transportation, and 8% from other expenditures.
- Studies show that 59% of PEI visitors used the Confederation Trail, including 45% of international visitors.
- Prior to arriving at PEI, between 60-69% of visitors from other provinces planned to use the trail.

Galloping Goose Regional Trail, British Columbia

Description

- This multi-use 55km rail trail runs from Victoria to Sooke, on Vancouver Island.
- Trail users are able to experience and enjoy a variety of scenery from urban to rural to wilderness.
- Galloping Goose is able to differentiate itself from other trails in Canada because the climate on Vancouver Island makes it usable all year around.
- The Trail first opened in 1987 and is now a part of the Trans Canada Trail system.
- The Trail connects to the 33km Lochside Regional Trail that goes from Victoria area north to Swartz Bay, the primary ferry terminal to Vancouver Island.

Trail Funding & Development

- Capital Regional District (CRD) Regional Parks division constructs, operates and maintains Galloping Goose Trail.
- CRD takes the primary role in accessing funds for the Galloping Goose Trail. Funds come from a variety of funding partners and sources including: municipalities, lottery funds, TransLink, BC crown corporations, the federal government, Cycling BC, British Columbia Cycling Coalition, BC Parks Partnership and Donations Program, Boys & Girls Clubs, and the Ministry of the Environment.
- In 2011, parking fees for BC Parks were removed, decreasing revenue that previously had helped offset the costs of park services for visitors.
- In recent years the Galloping Goose Trail has faced funding challenges with insufficient funding affecting route maintenance and postponing trail extensions.
- Galloping Goose Trail users are demanding more washrooms, water fountains and connections to the municipal bicycle lanes in cities.

Demographics of Users and Tours

- In 2012, an estimated 2 million trail users enjoyed the Galloping Goose Trail.
- Most visitors either biked to the Galloping Goose Trail or drove to the trail head and then cycled.
- Tour companies primary target markets are family and leisure cyclists are, followed by recreational and touring cyclists. Expert cyclists are least likely to purchase the cycling

tour packages.

- Families, followed by couples and singles are the most frequent purchasers of cycle tours with an equal level of female and males, most commonly aged 56-65 years of age.
- Majority of tour purchases come from within Canada (55%), followed by international visitors (40%) and BC residents (5%).
- While tour operators offer tours of various durations, sales are 20% same day trips and 80% overnight (all accommodations are in hotels, motels and bed and breakfasts).

Marketing of the Galloping Goose Regional Trail

- The trail is marketed through a variety of on-line sites and printed maps, including *the Cycle Map & Guide Vancouver Island*.
- Tour companies markets their cycling tour packages through company websites, visitor bureaus, and the Cycling BC association.

Tourism and Economic Benefits

- Galloping Goose Trail tourism revenue consists of 35% accommodation and food services, 31% in transportation, 26% in retail services and 8% in other services.
- Galloping Goose Trail has reportedly increased revenue for nearby bike shops and coffee shops.
- In a 2012 report, the direct impact of economic benefits from bicycle sales, including parts and accessories, totals approximately \$140 million per year in the province.

La Route Verte and La Véloroute des Bleuets

Description

- La Route Verte is a 5,000 km bicycle network across the province of Quebec.
- La Véloroute des Bleuets is a 256 km regional cycling circuit, a part of La Route Verte and situated in the Saguenay–Lac-Saint-Jean area.

Trail Funding & Development

- La Route Verte was made possible by partnerships and networks between The Ministry of Transport and Vélo Québec, with additional support from municipal and regional partners. The Ministry of Transport oversees the planning and development of the network segments on roads under its jurisdiction and acts as a link between on-site activities developed by Vélo Québec. \$290 million was invested in the Quebec bicycle network between 1996 and 2010.
- The funding models and partnerships for La Véloroute des Bleuets include federal and provincial government, plus First Nations communities, local municipal and regional partners in Saguenay-Lac-Saint-Jean.
 - \$6.9 million in non-repayable funding was allocated for the development La Véloroute des Bleuets.
 - In 2010, the annual financial contribution to La Véloroute des Bleuets by municipalities was a total of \$877,482. In the following amounts: \$198,262 was allocated towards maintenance; \$119,070 was to promotion and marketing; \$56,642 went towards the equipment and infrastructure to implement the Cycloguide and GPS system for Véloroute des Bleuets, providing trail users with

routing information, plus information on communities and a range of service and tourism businesses located on or near the trail; \$181,000 was put towards creating new accommodations, specifically 26 new campsites for touring cyclists at Saint- Henri-de-Taillon, which is located 2km of the Véloroute des Bleuets.

- The Véloroute des Bleuets was awarded \$15,500 through a Community Diversification program to develop its 2010 to 2015 strategic plan.

Demographics of Users and Tours

- A 2006 study conducted by Vélo Québec found that:
 - 54% of the Quebec population between the ages of 6 and 74 identified themselves as cyclists, with the largest number of cyclists in the 18-24 age group.
 - Out of the users of La Route Verte, 38% of the tourists were from outside of Québec.
 - Cyclists within Québec are well-educated and have high disposable incomes. 45% of cyclist are university graduates with 68% of cyclists with an annual income of more than \$40,000.
- Tour operator for the La Véloroute des Bleuets reports:
 - The highest number of tour packages are sold to recreational cyclists, followed by family/leisure cyclists and lastly the touring and expert cyclists.
 - Trail users that purchase tours are more likely to be travelling as couples, followed by families and then singles. Competitive cyclists are the least likely to purchase cycling tour packages.
 - Tour purchases are made by an equal number of female and male visitors, most commonly aged 46-55 years.
 - La Véloroute des Bleuets' cycle tour packages are purchased by residents from within the province at approximately 60%, 10% from within Canada and 30% are international visitors.
 - Approximately 50% of tours are multi-day and 50% are single day tours. The most popular length for a multi-day tour is for 5 days and 4 nights.
 - July, August and September are peak months for tour operators.

Marketing La Route Verte and La Véloroute des Bleuets

- To help market La Route Verte, improve visitor experience and increase visitor spending, Vélo Québec operates an accommodation certification program called 'Bienvenue Cyclistes!'. There are currently over 600 locations participating throughout the province.
- La Véloroute des Bleuets' representatives and tour operators have participated in international Adventure Travel Trade Association shows and in the Toronto and Quebec bicycle shows to promote the route and their tour packages.

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Tourism and Economic Benefits

- In 2000 Route Verte cyclists spent \$95.4 million. Vélo Québec estimates that this figure has grown to \$134 million annually since 2006.
- In a 2005 study by Vélo Québec⁵, it was determined the following in relation to the different types of cyclists and cycle tourists:

⁵ www.veloquebec.info/documents/bicyclingquebec2005-en.pdf Bicycling in Quebec 2005

- For the 200,000 people for whom cycling was the main motivation for travel they take an average of 2.2 bicycle trips annually, spending an average of 6.8 days vacationing by bicycle per year, Accommodation choices range with 53% choosing to stay at tourist accommodations (B&B's, hotels, motels, etc.), and 32% in campsites. On average they spend \$83 per day, in comparison to the \$66 per day spent by regular Québec tourists
- For the 410,000 people for whom cycling was one of a number of vacation activities in Quebec they take an average of 3.5 trips annually and cycled for an average of 5.4 out of 9.7 vacation days. Accommodations choices include 35% preferring hotel establishments and 35% campsites. Their vacation spending averages \$200 annually for the bicycle portion of their trips.
- The Quebec bicycle industry has reported approximately \$181 million in sales, supporting 2,800 jobs, producing tax revenues of \$17.2 and \$13.6 million for the Government of Quebec and Government of Canada respectively.
- La Véloroute des Bleuets is estimated to generate an annual regional economic spin-off of \$6 million.