



**Welcome Cyclists
Partnership**

Ontario Welcome Cyclists Partnership Advisory Committee Web Conference May 15, 2012

*T*ransportation
*O*ptions

Project funding provided by:



Agenda:

OWCP Introduction & Overview

Introduction of Advisory Committee

Focus: Cycle Tourism Research

1. Existing Ontario cycle tourism and bike industry research
2. New research recently completed or underway
3. Assess the gaps: What type of research do we need & what type would help you?
4. What's New In Cycling in your Region?



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Ontario Welcome Cyclists Partnership

***GOAL:** To facilitate destination development and promotion of Ontario's growing cycle tourism product*

How We Got Here:

Transportation Options strategic planning and consultation process, input from over 100 partners & stakeholder stakeholders

Three years of funding from The Trillium Foundation of Ontario

What Are We Going To Do?

The OWCP will coordinate activities to meet the following objectives:

- Development of a strategy for cycle tourism in Ontario
- Providing a core information hub for cycle tourism in Ontario
- Cycle tourism destination and product development in Ontario
- Development and bringing to market new cycle tourism packages, feature itineraries and special events



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How we are going to do it?

- Develop partnerships to support the development of an Ontario Cycle Tourism Strategy
- Marketing and promotion of cycle tourism
- Initiate and commission market research studies
- Ontario cycle tourism conference #2
- Input from the OWCP Advisory Committee



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Advisory Committee Participants

- Regional representatives based on RTO geographical breakdown of Ontario (RTO1-13)
- Variety of backgrounds including:
 - Tourism partners
 - Cycling industry business stakeholders
 - Active transportation planners
 - Connected individuals
 - Regional cycling organizations
 - Cross Provincial organizations
 - Periodic special advisors
- Public & private sector
- There are currently 24+ participants



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Ontario Cycle Tourism Research

Why is it important?

- Ontario lacks data, #'s, stats on cycle tourism
- Economic impact studies
- Increase support & drive development
- Year to year benchmark, evaluation

Working with partners OWCP to undertake market research studies



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Cycle Tourism Research Elsewhere

- Vélo Québec – \$166 M spent annually
Bicycling in Quebec 2010
- British Columbia - Mountain Biking
- USA – \$46.9 B spent annually nationwide
State & regions – Maine to Erie, NY
- Europe – # of nights stayed & economic impact
Germany, Netherlands, UK
- Worldwide – Australia & NZ



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Existing Ontario Research

Tourism Related

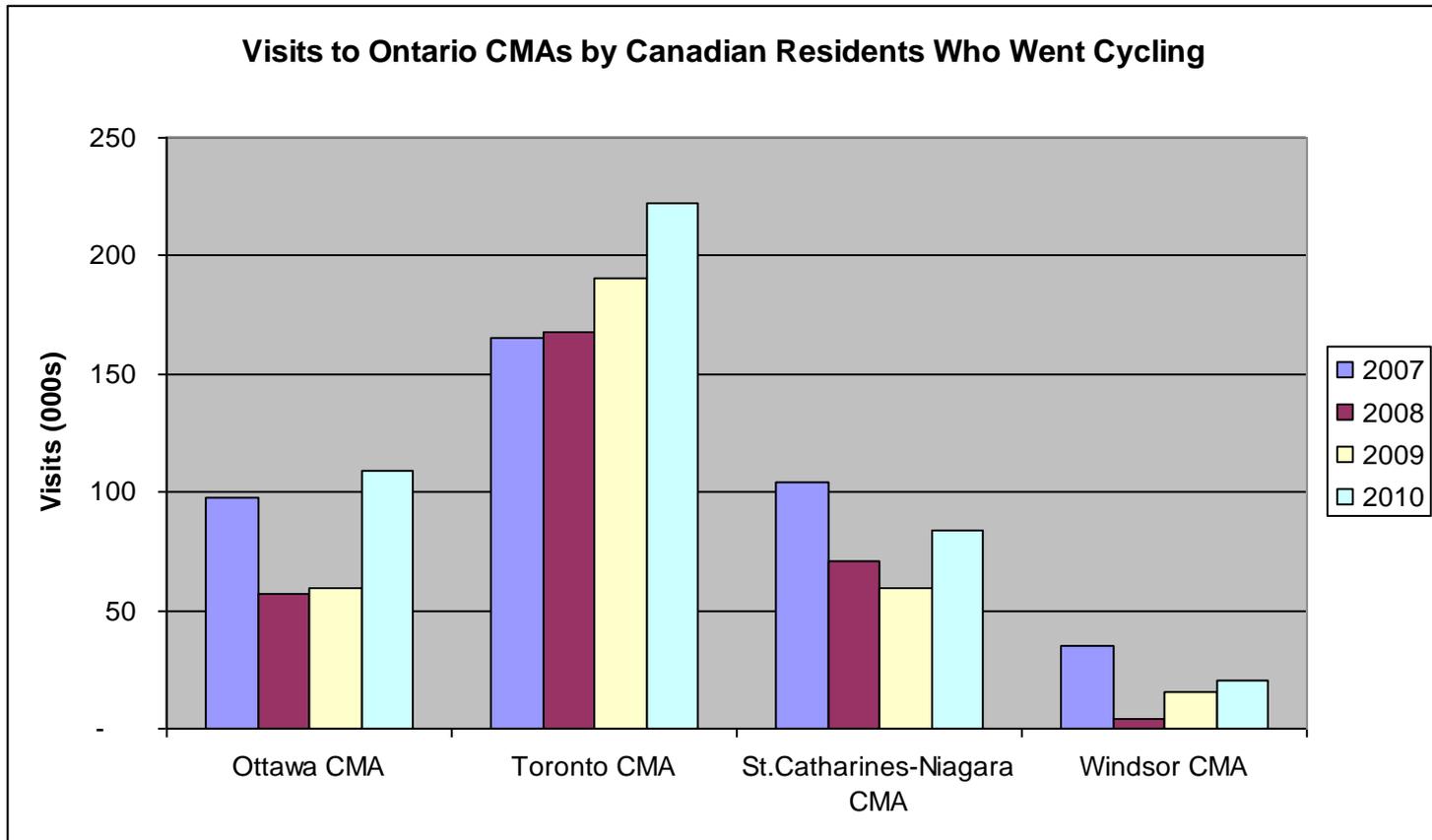
- In 2009, 1.5 million Canadian/Ontario visitors cycling in Ontario, spent around \$332 million
- In 2009, Ontario attracted 34% of Canadian visitors who went cycling anywhere in Canada ,
- In 2010, 2 million Canadian/Ontario visitors cycling in Ontario, spent around \$391 million
- In 2010, Ontario attracted 38% of Canadian visitors who went cycling anywhere in Canada
- In both 2009 and 2010, around 3% of all Canadian visitor expenditures in Ontario can be attributed to those who went cycling.

Source: Transportation Options, Sustaining Tourism, Ministry of Tourism, Culture & Sports, Statistics Canada, Travel Survey of Residents of Canada



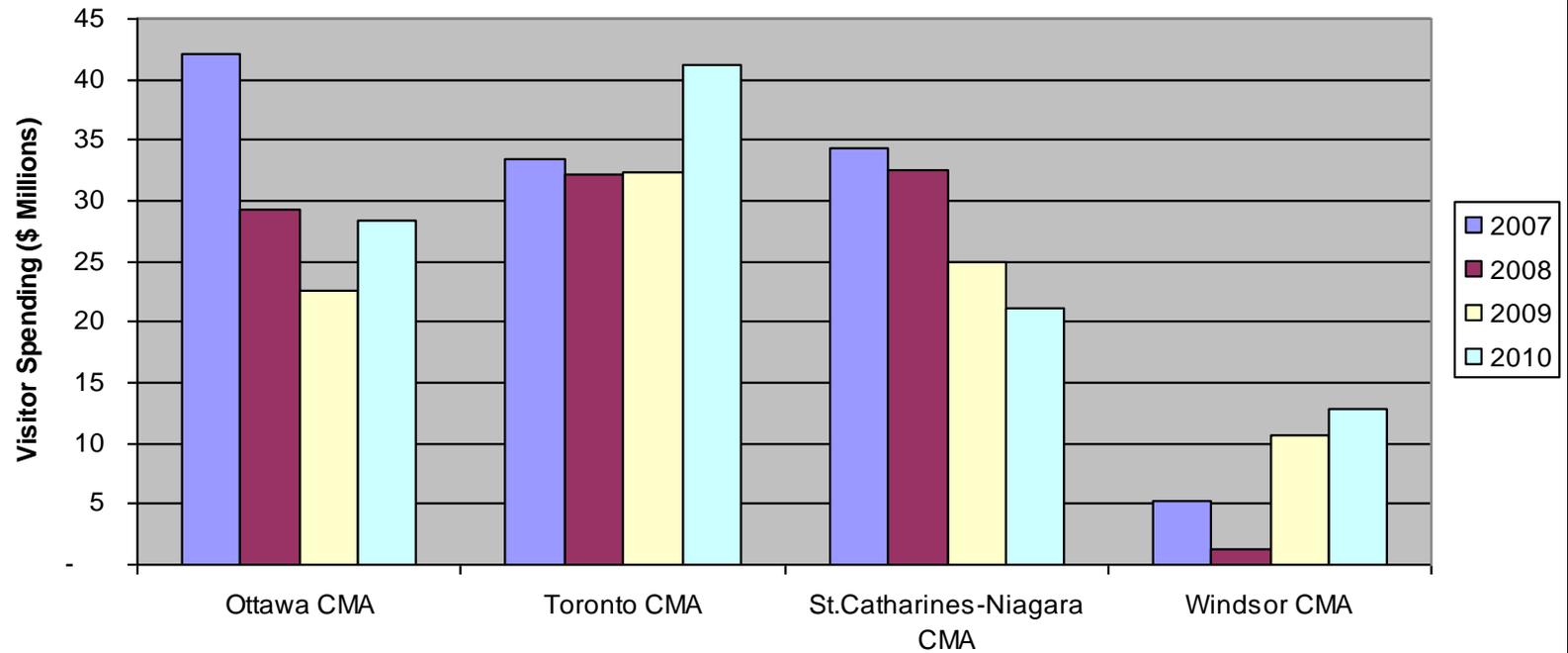
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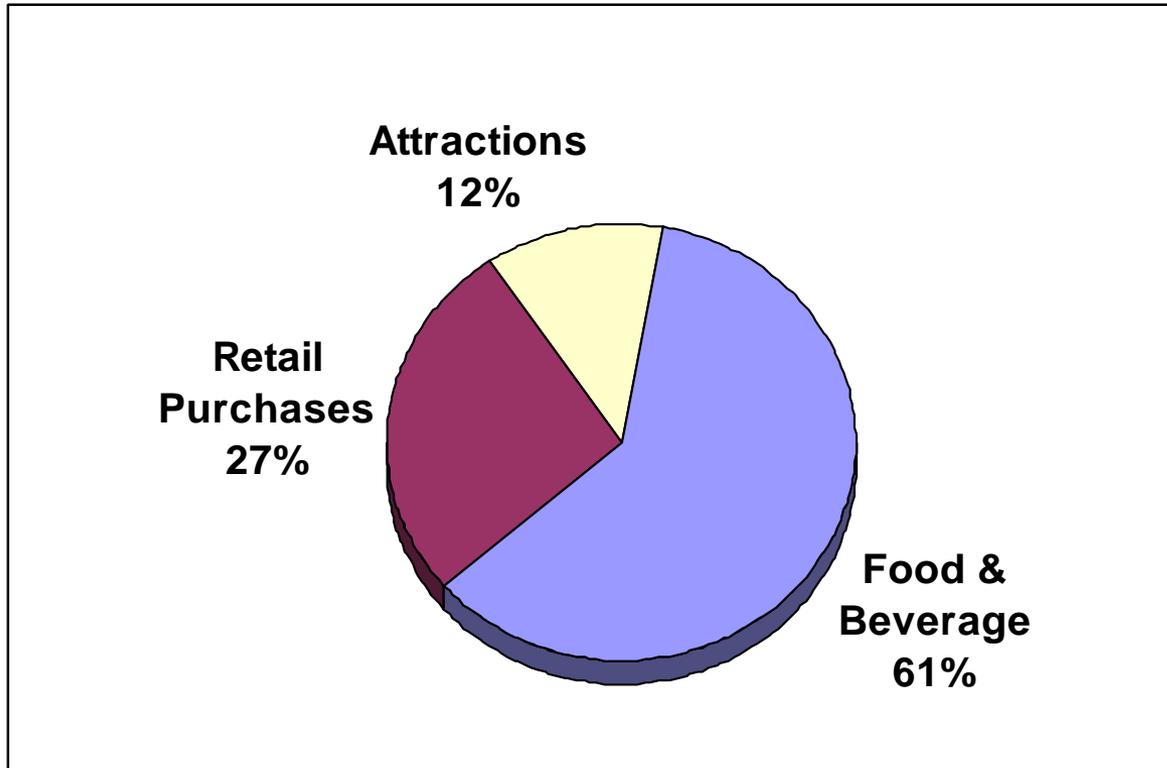
- Toronto highest number of cycle tourists, 223,000 in 2010
- As a proportion of all Canadians who visit Toronto, about 1% of visitors go cycling, lowest

Canadian Cycle Tourists Spending in Millions



- \$20M-\$45M range between regions
- Overnight vs sameday range Toronto 46% sameday, other CMA's 0%-20%

Economic Impact of Cycle Tourists in Niagara



\$148 pp

- Average spending by cyclists staying one or more nights
- Excludes accommodations



Great Waterfront Trail Adventure

Economic Impact of Past Events

- Approximately \$73,000 spent by participants on accommodations & food, above nightly camping and 3 meals included in registration
- 22% stay at hotels every night;
- 44% spend at least one night in hotel;
- 71% sign up for optional activities
- 83% plan to return to communities;
- 48% from GTA
- 43% spend up to \$25 per day on food;
- 48% spend \$25 - \$34
- 74% spend up to \$50 on bike supplies and similar amount on other retail purchases



Ontario cycling event participants - post event survey potential

Existing Ontario Research

Bike Industry

- City of Toronto – Number of cyclists; Road to Health Report, April 2012
- BTAC – Annual bike sales, volume & units
- Stratcom/Share the Road Research

Cycling in Ontario

28% surveyed cycle regularly

58% want to ride more



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New Ontario Research

- Share the Road – Bicycling in Ontario
- Niagara Region Public Health
- Ministry of Transportation – Cycling Route Research Project

Completed March 2012

OWCP – Assess the gaps



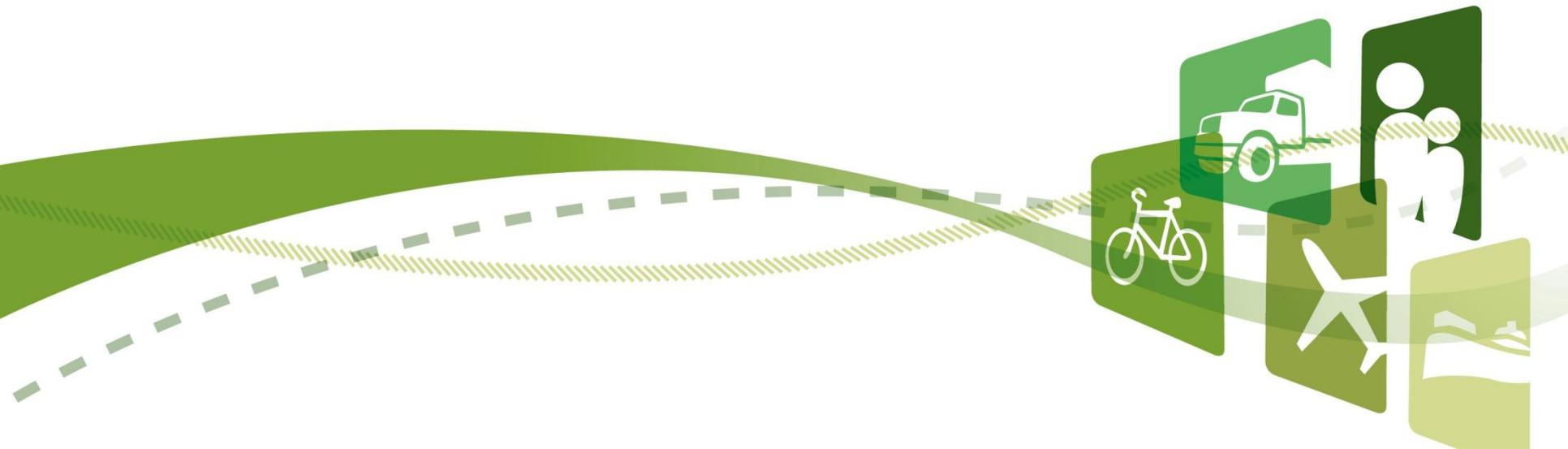
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Cycling Route Research Project

Summary of Findings

May 2012



- Background
- Project Methodology
- Key Findings
- Questions



- The Ministry of Transportation (MTO) has undertaken several recent initiatives to support cycling in Ontario:
 - Transit Supportive Guidelines
 - Ontario Bikeways Planning and Design Guidelines
 - Partnering with municipalities to develop Ontario Traffic Manual, Book 18
 - Paved shoulder pilot on 66 km of provincial highways
 - Increasing information about sharing the road with cyclists in the 2007 and 2012 updates of the Ontario's Drivers Handbook
 - Road Safety Community Partnership Program *

- Goal of the Cycling Route Research Project was to collect information on best practices in planning, operating and marketing cycling routes.
 - Requests for accommodating cycling on provincial highways are increasing, but we must work within the limits of the financial resources available.
 - Information gathered could be useful in developing priority areas for accommodating cycling on ministry highways.
 - It is important to note that this project was a data-gathering mission and that no plan has been created, nor is there a mandate to develop a plan at this time.
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Consultations

- Tourism industry, trails organizations, road user groups, the planning profession, cycling trade association and others.

Municipal Questionnaire

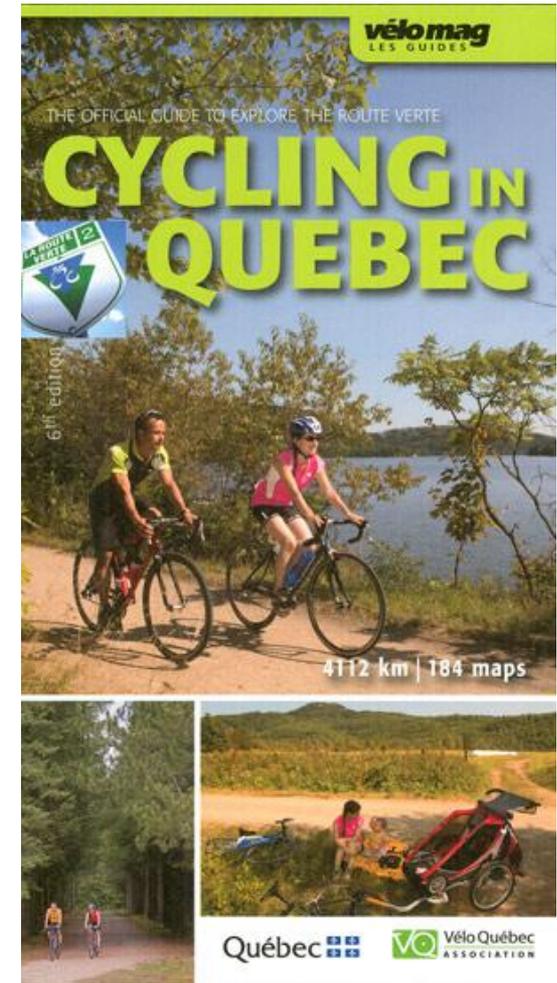
- Asked about the characteristics of key cycling routes.

Jurisdictional Scan

- 9 major cycling routes or networks—3 each in Canada, the United States and Europe.

Route Selection Criteria

- Identifying key characteristics to consider when planning a regional cycling route.



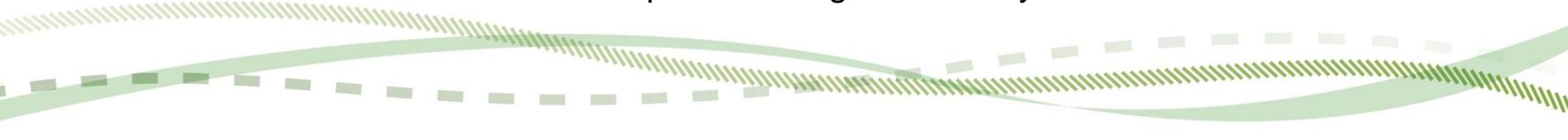
Route Selection

- Most important criteria when choosing a cycling route:
 - Safety – Separation of cyclists from high volumes of motor vehicles; off-road facilities essential for attracting diverse users.
 - Attractiveness – Attractive natural scenery and connections to popular tourist attractions.
 - Connection to built up areas with goods and services and potential route users.

Partnerships

- Capital expenditures shared between senior-level and local governments in most jurisdictions with cycling networks.
- Ontario stakeholders willing to participate in marketing a provincial cycling network.
- Support adding a provincial brand to existing routes, but not replacing the existing brands.

Outstanding Issues

- Potential for conflicts between bicycles, ATVs and horses and buggies in some areas.
 - More information needed about best practises in bike route maintenance.
 - More information needed about protection against liability.
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Conclusion Questions?



New Ontario Research

OWCP – Assess the gaps

- Scope & scale of research
- Market Research
- Qualitative vs Quantitative
- Partnerships
- Regional level
- Cycling events



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New Ontario Research

Next Steps

- Determine type of research needed
- Partnership – regional, provincial, universities
- Partnerships will dictate the type & level of research
- Check-in & share anytime
- Report at next Advisory Committee meeting



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What's New in your area?

Cycle Tourism ~ Summer 2012



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*Thank you for
joining us!*



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