

CYCLE TOURISM IN ONTARIO

A Report on the State of Ontario's
Cycle Tourism Sector



**FEBRUARY
2019**



*Transportation
Options*



Cycle Tourism Sector Report 2019

We are pleased to share with you an update on the status of the cycle tourism sector in Ontario. It has been a few years since our last sector report, *From Niche to Now*, was published in 2015, yet we still see the continuing growth trend, as supported with data and research in this the 2019 report, in the dynamic cycle tourism sector in Ontario.

Facts and figures are something we all need as they lend weight and help justify investment and business decisions that help meet the growing demand of both residents and visitors who want to cycle more. A healthy case can be put forward from a number of perspectives.

Ontario By Bike is a program of not-for-profit organization, Transportation Options. Developing and marketing cycle tourism through a number of projects and supporting program areas has been one our organizations focuses since 2008, and working together we continue to roll forward seeing many positive impacts and indicators.

Thank you for your support, we look forward to continuing to work together.

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Acknowledgments

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Find this report and additional research online:

www.TransportationOptions.org/Research

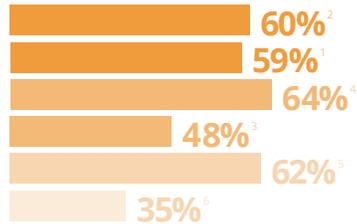
www.OntarioByBike.ca www.TransportationOptions.org

ONTARIO CYCLE TOURISTS

Research shows consensus about who is the most frequent Ontario Cycle Tourist

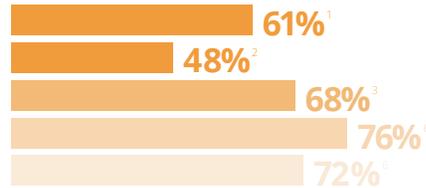


Ages 45-65



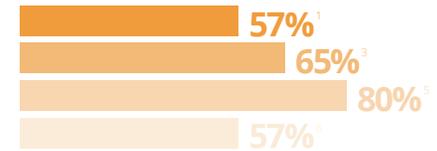
- The 45 to 65 age range is the largest market
- Also significant is the 25 to 44 age range, followed by the over 66 age range

Male Cyclists



- Female riders continue to increase
- A larger percentage of women identify themselves as leisure/recreation cyclists, where more men identify themselves as experienced or race/competitive cyclists¹

University Education



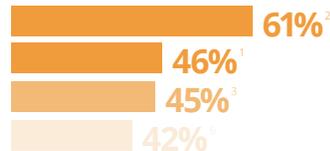
- Cyclists are well-educated

Experienced Cyclists



- A larger number of cyclists identify themselves as experienced riders

\$100,000+/household



- Cyclists have higher-than-average household incomes

Full-Time Employment



- Number of retired riders are growing, 23% in 2018; 8% in 2012

Ride and Travel Preferences



More cyclists are taking day and overnight trips with their bicycles. A growing number of recreational/leisure cyclists are taking overnight trips in Ontario. Experienced cyclists are taking more frequent overnight trips.

- 63% of cyclists travel in groups of 2 to 4, similar to 66% in 2015^{1,3}
- 45% are members of a cycling club in 2018¹

Bike Trips



- 75% of cyclists have taken a bike or included cycling as a significant part of an overnight trip in Ontario in the past 2 years¹
- 43% of cyclists are taking 3 or more overnight trips in Ontario in the past 2 years¹
- Comparable to 53% of cyclists surveyed by Adventure Cycling taking 3 or more overnight bicycle trips in the past 2 years⁷ and an average of 3.1 cycling trips in Ontario in 2014³
- 92% of cyclists have taken a bike or included cycling as a significant part of a day trip in Ontario in the past 2 years; 59% taking 5 or more such trips¹
- 78% of experienced cyclists took overnight trips in Ontario, versus 62% of recreational/leisure cyclists. Compared to 2015, 70% experienced and 30% recreational/leisure took trips in Ontario^{1,3}
- 62% of cyclists have taken overnight cycling trips outside of Ontario in the past two years, compared with 50% in 2014 with 1.9 the average number of trips. The most popular ride destinations continue to be other provinces in Canada, followed by the United States^{1,3}
- 63% take cycling trips 3 days or more in duration⁷
- 56% of cyclists prefer self-guided, self-supported cycling trips⁷
- 43% favour a daily ride distance of 50 to 80km, 36% prefer a distance of 80 to 100km⁷

Other Activities



- Top activity preferences by all cyclists, in order are: visiting museums and cultural sights; followed by wine and beer tastings; going to the beach; hiking and other outdoor activities; arts and studio tours¹
- Additional supporting research indicates the top 3 activities in addition to cycling are: visiting local attractions; relaxing; local culinary experiences⁷



CYCLE TOURISM IMPACT IN ONTARIO⁸

\$517 MILLION

- Cycling visitors in Ontario spent \$517 million in 2016, accounting for 1.9% of total visitor spending in Ontario (\$497 million, 2% of visits in 2015; \$428 million, 1.8% of visits in 2014)

1.6 MILLION cycling visits in Ontario (2016)

- 1.6 million cycling visits represents 1.1% of total visits in Ontario (1.7 million, 1.2% of visits in 2015; 1.7 million, 1.2% of visitors in 2014)

\$317

per trip spent by cyclists

- Cycling visitors generally spend more on average per trip than other visitors, \$317/trip for cycling tourists compared to \$186/trip for total visitors in 2016
- Cycling tourists to Ontario stay longer than regular visitors and the majority of Ontario visits by cyclists were overnight visits (94%)
- The average number of nights spent on cycling visits was 4.4, slightly above Ontario's total visitor average of 3.4 nights



- Ontario residents accounted for the majority of cycling visits (84%) and spending in Ontario (47% in 2016) (86% of visits and 64% of spending in 2015; 88% of visits and 61% of spending in 2014)
- Residents from other Canadian provinces accounted for 7% of visits and 14% of spending in 2016 (7% of visitors and 11% of spending in 2015; 6.5% of visitors and 10% of spending in 2014)
- Visitors from the United States represented 3% of visits and 2% of expenditures (2.5% of visitors, 3% of spending in 2015; 2% of visitors, 2% of spending in 2014), and overseas visitors accounted for 6% of visits and 37% of spending (5% of visitors, 24% of spending in 2015; 3% of visitors, 21% of spending in 2014)

CYCLE TOURISM IMPACT ON BUSINESSES

Accommodations

The type of accommodation preferences for cyclists varies.

72% preferred hotels, followed by cottage stays and hostels and private rentals/Airbnb's. Motels and staying with friends and relatives also ranked high.¹

Another survey of cyclists (with majority from respondents from the US) places campgrounds as top preferred accommodation, followed by motels, hotels and B&B's.⁷

- 66% of cyclists spent over \$50 per night on accommodations in 2018 while on a bike trip, compared to 69% in 2014^{1,3}
- 42% of cyclists spent over \$100 per night on accommodations in 2018, compared to 38% in 2014^{1,3}
- The largest percentage of cyclists spent between \$101 and \$150 per day¹

Cafés & Restaurants

- 79% of cyclists spent over \$26 on food and beverage each day in 2018 while on a bike trip, compared to 81% in 2014^{1,3}
- 40% of cyclists spent over \$50 on food and beverage each day in 2018, compared to 36% in 2014^{1,3}
- The largest percentage of cyclists spent between \$26 and \$50 per day¹

Attractions & Other Activities

- 36% of cyclists spent over \$26 per day on attractions and other activities, 64% spend between \$0 and \$25 in 2018 while on a bike trip¹

Retail Shopping

- 30% of cyclists spent over \$26 per day on retail shopping, 70% spent between \$0 and \$25 in 2018 while on a bike trip¹

Bike Tours



- On a 2 day, 1 overnight Ontario By Bike Ride bike tour the average spending ranges from \$216 to \$607 per participant per day for a total economic impact of \$9,093 to \$24,313³
- On a 3 day, 2 overnight bike tour the spending ranges from \$530 to \$567 per participant per day for a total of \$20,128 to \$22,115³
- 48% spend more than \$75 per day per person on expenses while on a bike trip⁷

Ontario By Bike Network



The Ontario By Bike Network is a robust program certifying and promoting bicycle-friendly businesses and cycle tourism across Ontario. The network certifies locations under the categories of: accommodations; cafes and restaurants; attractions and campgrounds; bike stores, bike rentals and bike tours; visitor information centres; wineries and breweries; and business areas.



Participating Locations

The number of certified bicycle-friendly locations registered with the Ontario By Bike Network has grown significantly since its inception in 2011. There are currently over 1,500 certified bicycle-friendly locations in Ontario.

- Over the past 8 years, an average of 170 businesses and locations join the Network each year
- The Ontario By Bike Network has an annual growth rate of nearly 37%
- As of February 2019, the Ontario By Bike Network is administered in portions of all 13 Tourism Regions of Ontario, with 39 sub-regions in total

| YEAR | NUMBER OF OBB BUSINESSES |
|-----------------|--------------------------|
| 2011 | 348 |
| 2012 | 562 |
| 2013 | 754 |
| 2014 | 972 |
| 2015 | 1002 |
| 2016 | 1195 |
| 2017 | 1360 |
| 2018 | 1496 |
| 2019 (February) | 1531 |

As of February 2019, Ontario By Bike Network has certified:

| CATEGORY | NUMBER OF BUSINESSES |
|-----------------------------|----------------------|
| Accommodations | 569 |
| Cafés & Restaurants | 279 |
| Attractions | 243 |
| Bike Stores & Rentals | 176 |
| Visitor Information Centres | 102 |
| Wineries | 54 |
| Campgrounds | 41 |
| Bike Tours | 33 |
| Breweries | 28 |
| Business Areas | 6 |



Ontario is divided into 13 tourism regions. The number of Ontario By Bike certified bicycle-friendly locations per region is:

| REGIONAL TOURISM ORGANIZATION | NUMBER OF BUSINESSES |
|--|----------------------|
| 1 South Western Ontario | 211 |
| 2 Niagara | 163 |
| 3 Hamilton, Halton, Brant | 104 |
| 4 Huron, Perth, Waterloo & Wellington | 29 |
| 5 Greater Toronto Area | 29 |
| 6 York, Durham, Headwaters | 167 |
| 7 Bruce, Grey, Simcoe | 165 |
| 8 Kawarthas Northumberland | 108 |
| 9 South Easter Ontario | 239 |
| 10 Ottawa Countryside | 88 |
| 11 Haliburton Highlands to the Ottawa Valley | 89 |
| 12 Algonquin Park, Almaguin Highlands, Muskoka & Parry Sound | 67 |
| 13 Northern Ontario | 72 |

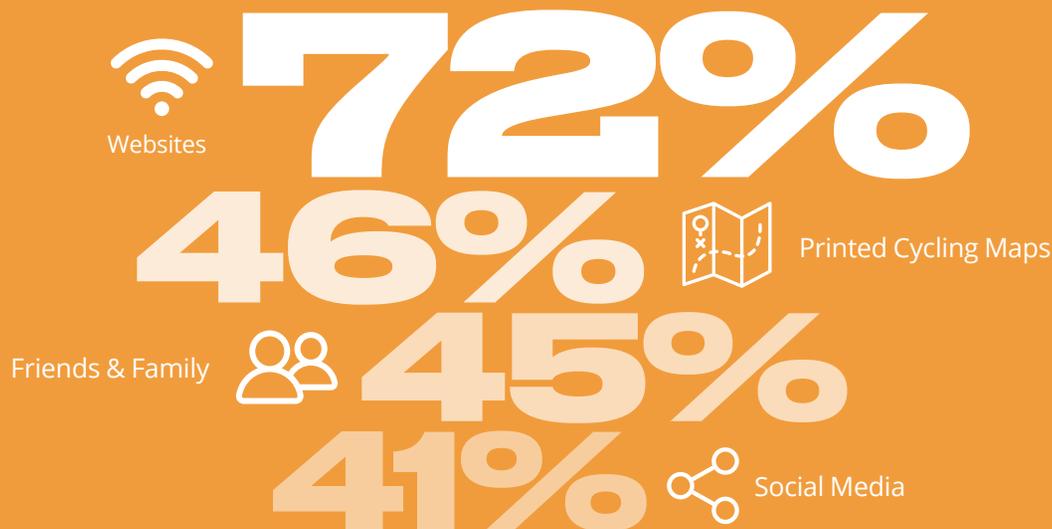


Photo credit: Destination Ontario (top right), Waterfront Regeneration (bottom left)

Preferred Pre-Trip Info Sources

Websites, social media and printed cycling maps continue to be the top three sources of pre-trip information for cyclists, which is directly comparable to 2014.

In 2018, the top pre-trip information sources¹ were:



Info Used While Riding

Most frequently used navigation sources while riding, in order are:

- 1 Smartphones, Google Maps
- 2 Print cycling maps
- 3 Wayfinding signage
- 4 GPS units

Smartphones (including Google Maps), printed cycling maps and GPS continue to be the top sources of pre-trip information for cyclists, however in 2018 wayfinding signage was increasingly used by cyclists¹.

In 2014, print maps were preferred source of info followed by smartphones³.

Media Consumption Profiles of Cyclists¹¹

- Light TV Viewers - (movies, home renovation shows, sitcoms)
- Medium/Heavy Radio Listeners - Mainstream/Top 40, news/talk, adult contemporary
- Heavy Online Use
 - Social Media: Facebook, YouTube, Instagram
 - Top Activities: Map/directions, food/recipe content, health related content, news, restaurant guides and reviews

Cycling Maps & Other Print Marketing Materials

Print cycling maps are popular with cyclists and are used to assist with planning bike trips and navigation when cycling.

There's an estimated 53 cycling maps available from regions, municipalities and trail organization in Ontario. Most regions have a dedicated cycling map. Each map is unique in style, containing different information presented in different formats. Some maps cater more to the needs of cycle tourists and help promote the region as a cycling destination, others more simply show infrastructure on the roadways and trails, still providing great value. Regardless of the type of map, each year thousands of copies are printed and distributed to avid and inspiring cyclists.

The following shows an example of the number of cycling maps printed in various regions and municipalities.*

| | |
|---|----------------------------------|
| Cycle Simcoe County Maps | 30,000 printed annually |
| Grey County Cycling Routes Map | 20,000 printed in 2018 |
| Haldimand Cycling & Hiking Map | 17,500 printed since 2017 |
| Hamilton Bike Routes, Trails & Parks Map | 80,000 printed biannually |
| London Bike & Walk Map | 15,000 printed since 2017 |
| Manitoulin Cycling Routes and Road Map | 6,000 printed in 2018 |
| Mississauga Bike Map | 21,000 printed in 2018 |
| Niagara Region Cycling Map | 45,000 printed since 2017 |
| Northumberland County Cycling Adventures Map | 15,000 printed in 2018 |
| Ottawa-Gatineau Regional Cycling Map | 60,000 printed in 2018 |
| Ottawa Valley Cycling Map | 20,000 printed in 2017 |
| Prescott-Russell Cycling Map | 10,000 printed in 2019 |
| Ride Oxford County Cycling Map | 10,000 printed in 2018 |
| The Great Waterway Cycling Map | 12,000 printed since 2017 |
| Toronto Cycling Map | 130,000 printed annually |

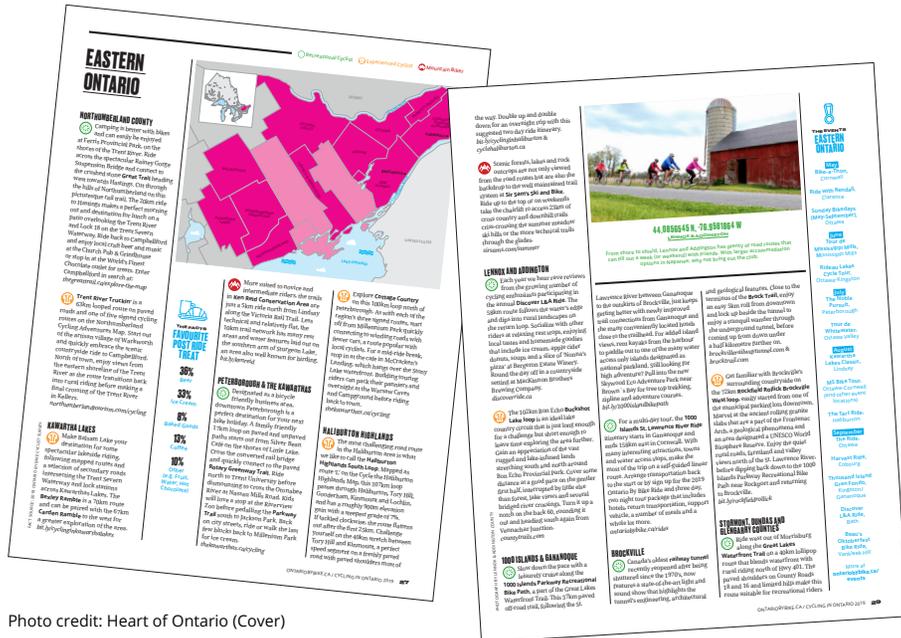


* Print estimates were provided by regional or municipal contacts. Some totals have been compiled over two years.

Cycling in Ontario / Le Vélo en Ontario

This popular free guide promoting cycle tourism in Ontario is now in it's 7th year of publication. Printed in both French and English the guide inspires cyclists to explore new destinations by bike. Partners make it possible.

- 2019, 40 pages, 40,000 copies printed (27,500 in English and 12,500 in French), 38 partners
- 2018, 40 pages, 40,000 copies printed and distributed, 13,500 digital reads, 35 partners
- 2017, 32 pages, 37,000 copies printed and distributed, 29 partners
- 2016, 28 pages, 37,000 copies printed and distributed
- 2015, 24 pages, 35,000 copies printed and distributed, 20 partners
- 2014, 20 pages, 35,000 copies printed and distributed
- 2013, 8 pages, 10,000 copies printed and distributed, (French only) 1 partner



View at: www.ontariobybike.ca/2019

Photo credit: Heart of Ontario (Cover)

BIKE RETAIL & ACCESSORY SALES¹



56% ride a bike valued between \$500 to \$2,000, 35% ride bikes that cost more than \$2,000 (similar to 2015 with 52% and 35% respectively).

50% spent more than \$500 annually on bike equipment, clothes and accessories, 23% spend over \$1,000¹.

| COST OF BIKE | PERCENTAGE ¹ |
|-----------------|-------------------------|
| <\$500 | 6.5% |
| \$500-\$1,000 | 19.0% |
| \$1,001-\$2,000 | 26.5% |
| \$2,001-\$3,000 | 16.0% |
| \$3,001-\$4,000 | 12.0% |
| \$4,000+ | 20.0% |

Industry Insight¹⁷



The decrease in road bike sales over the past 4 to 5 years is somewhat mitigated by the increase in ‘gravel/adventure’ drop bar bikes.



Mountain bike is seeing a substantial resurgence. There is an increase in consumer interest at all levels, from beginners to enthusiast. This is also evident in the increase in community support for building MTB trails.



E-bike sales are on the rise and could represent as much as 12% of the market in 2019. City-commuter e-bikes are the most established category, however there is a strong appetite for MTB and drop bar e-bikes.



There is an increased interest in higher-end kid’s products as cycling parents want their children on good bikes and equipment. Kid’s are truly taking part in the sport, not just riding to school or around the neighbourhood (MTB particularly of note).

Photo credit: Dianna Hammond, DiBytes Photos

- Categories of bicycles and accessory sales do fluctuate, yet overall sales remain relatively flat in North America
- Outdoor retail channels are increasing their presence and concentration in the bicycle segment (MEC, Sportcheck, REI in the US, and others)

Tourism Insight¹⁷

- Of note, to maintain competitive, destinations are developing new trail heads and riding destinations, through infrastructure improvements and investment from both private and government sources
- Huge opportunity for rentals and tour operators as e-bikes are much more reliable than in the past, they cover all types of categories of bikes and allow a larger range of riders to enjoy the experience. Cost per unit and personal prejudices being the limiting factors at the moment
- Significant opportunity for tourism as more and more families travel to ride trails

CYCLING EVENTS^{1,3}

Touring events are the most popular type of cycling event preferred by all types of cyclists after which charity fundraising events are participated in more frequently by experienced and racing/competitive market.

- 54% of cyclists participate in 3 or more cycling events annually as of 2018, comparable to the average of 3.2 cycling events in 2014
- 62% of experienced cyclists participate in more than 3 cycling events annually as of 2018 (31% in 5 or more events annually), up from 36% in 2014
- 86% of racing cyclists participate in 5 or more events annually, as of 2018



| NUMBER OF CYCLING EVENTS ANNUALLY | PARTICIPATION PERCENTAGE |
|-----------------------------------|--------------------------|
| 0 | 12% |
| 1-2 | 34% |
| 3-4 | 26% |
| 5+ | 28% |

- 43% and 46% respectively of beginner and leisure/recreational cyclists participate in events one to two times annually, however almost a third or more of both these types of cyclists do not participate in any events
- Experienced cyclists are more likely to participate in an event with a group of 2 to 4 other cyclists

Event Case Studies



Paris to Ancaster Bike Race¹²

This popular annual single day spring race is set on rough farm lanes, trails and gravel roads and is inspired by the classic Paris to Roubaix race. The 2018 edition was the 25th and attracts over 2,000 riders.

- 78% of riders were tourists, travelling greater than 40km from their place residence to participate in event in 2018.
- 38% stayed overnight at the following types of accommodations:
 - 28% stayed at second homes
 - 5% stayed at bed & breakfasts
 - 26% stayed with friends or family
 - 36% stayed at a hotel/motel
 - 5% stayed at a vacation rental

Ride participants participated in the following activities:

- 43% visited local cafes and restaurants
- 25% bought food/drinks at store
- 15% visited local attractions
- 11% visited neighbouring towns
- 6% enjoyed other activities in addition to cycling

Event Case Studies



Photo credit: Waterfront Regeneration Trust (top), Waterfront Regeneration Trust, Martin Lortz (bottom)



Great Lakes Waterfront Trail Adventure^{2, 13}

The Great Lakes Waterfront Trail Adventure (GWTA) is an annual multi-day touring event that follows and celebrates a different section of the Great Lakes Waterfront Trail that is now over 3,000km in length across Ontario. The 2018 edition was the 11th with over 160 participants.

- 137 total room nights were booked by participants in the 2017 GWTA; 70% of participants camped and 30% stayed in hotels
- 47% of riders will participate in 2 or more overnight cycling events in Ontario during 2018
- 77% have taken 1 or more pleasure trips in Ontario where cycling was a significant part of the trip in the last 2 years
- 57% have taken 1 or more pleasure trips outside Ontario where cycling was a significant part of the trip, in the past 2 years
- On the 6 day, 6 night 2018 Great Waterfront Trail Adventure the average spending was \$833 per participant total, for a total economic impact for entire tour of \$203,805
- 75% will return to visit a community or area they cycled through during the 2018 GWTA
- 97% indicated they were likely or very likely to return to host region, Hamilton Halton Brant
- 96% indicated they were likely or very likely to recommend Hamilton Halton Brant to friends or family

2018 Geographical Distribution of Cycling Events in Ontario

A total of 182 cycling events in 2018 were listed on Ontario By Bike’s website and dedicated cycling event webpage. This represents an 86% growth in cycling events posted on the Ontario By Bike website since 2014.

See cycling event listings at: www.ontariobybike.ca/events



| REGIONAL TOURISM ORGANIZATION # | PERCENTAGE OF EVENTS |
|---------------------------------|----------------------|
| RTO 1 | 9% |
| RTO 2 | 5% |
| RTO 3 | 5% |
| RTO 4 | 7% |
| RTO 5 | 8% |
| RTO 6 | 14% |
| RTO 7 | 14% |
| RTO 8 | 5% |
| RTO 9 | 6% |
| RTO 10 | 4% |
| RTO 11 | 3% |
| RTO 12 | 3% |
| RTO 13 | 5% |
| Cross-Regional | 9% |



Photo credit: Waterfront Regeneration Trust (top), Cycle Waterloo (bottom)

* Note: This list did not include all cycling races, weekly race series or community bike events. Based on Province of Ontario Regional Tourism Organization’s geographical boundaries.

BIKE TRANSPORTATION

Both trains and ferries help transport cycle tourists in Ontario. Service providers are able to collect data on the number of bikes transported.



Transportation By Train

GO Transit Toronto Niagara Seasonal Service¹²

Operating on weekends and holidays in July and August, plus Victoria Day and Thanksgiving weekend, two special bike coaches travel this route with bike racks that allow for up to 64 bikes per train.

- 2010: 1,600
- 2015: 2,730
- 2016: 2,660
- 2017: 2,814
- 2018: 2,557



Additional information on bike transportation service in Ontario can be found at: www.biketrain.ca

Transportation By Ferries

MC Chi-Cheemaun Ferry – Tobermorey to Manitoulin Island¹⁵

- **2018:** 3,130 passengers with ride-on-bikes
- **2016:** 5,503 bikes transported, a combination of both passenger with ride-on and those travelling with bikes racked on vehicle
- **2014:** 5,200 bikes transported, a combination of both passenger with ride-on and those travelling with bikes racked on vehicle

Pelee Island Ferry – Leamington to Pelee Island¹⁵

- **2018:** 6,819 passengers with ride-on-bikes
- **2016:** 8,250 passengers with ride-on-bikes
- **2014:** 6,277 passengers with ride-on-bikes
- **2012:** 4,887 passengers with ride-on-bikes

Toronto Island Ferry¹⁸

- 1.5 million passengers transported in 2018 to the Toronto Islands, city park and car-free setting popular with cyclists and recreational users
- 10% of ferry passengers are estimated to be travelling with bikes, up from 3 to 5% a decade ago

Amherst Island Ferry – West of Kingston, South Eastern Ontario^{19*}

- **2018:** approximately 535 passengers with ride-on bikes
- Bike counts from 2015 to 2017 range between 800 and 975 annually



Glenora Ferry – Adolphustown to Glenora, Prince Edward County^{19*}

- **2017:** 2,247 passengers with ride-on bikes
- Bike counts from 2013 to 2015 range between 2,000 and 2,500 annually

Wolfe Island Ferry – Kingston to Marysville^{19*}

- **2018:** approximately 7,500 passengers with ride-on bikes
- Bike counts from 2015 to 2017 range between 10,500 and 14,000 annually

CYCLING INFRASTRUCTURE & FACILITIES



Photo credit: Elgin County

The investment in cycling infrastructure and facilities is also a positive indicator that cycling and cycle tourism is a growing sport, transportation mode and tourism sector. Cycling infrastructure that is used by residents can also be used by visitors who cycle; cycle tourists.

In a 2018 poll, 64% of Ontarians say having more and better cycling infrastructure in their community, such as protected bike lanes and paved shoulders, would encourage them much more or somewhat more to bicycle more often.

When asked, 53% strongly or somewhat agree, that Ontario should provide more financial support to municipal and regional bike tourism initiatives.¹⁶

In 2017 municipalities across Ontario applied for match funding for cycling infrastructure projects. A total of 120 municipalities received \$93 million in funding from the Government of Ontario for new bike lanes and other cycling infrastructure. Program funding increased from the \$42.5 million announced earlier the same year, and \$25 million in 2013.²⁰

Many new cycling infrastructure projects have been initiated and/or completed in recent years, significantly increasing and improving safe cycling on roads and trails in many jurisdictions across the province.

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