

Ontario By Bike Network



Excerpt from Network Participant Tool Kit

2016

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Why Welcome Cyclists?

Cycle Tourism: International

Tourism is one of the largest industries in the world. Although tourism receipts may fluctuate in response to economic conditions, the growth in cycle tourism increases yearly. The economic impact of growing a successful cycle tourism industry has been documented worldwide.

- It is estimated there are 2.295 billion cycle tourism trips taken in Europe annually. The economic value of these trips taken by both domestic and international travellers is €44 billion per annum (approx. CDN\$59 M). The number of cycle overnight tourists is 20.4 million, with spending at approximately account for €9 billion (approx. CDN \$12 M).ⁱ
- Switzerland mobility estimates that cycling and human powered use of the Swiss trail systems generated 145 million Swiss Francs (approx. CDN\$158 M) in 2011.ⁱⁱ
- Netherlands reports 2.5 million overnight stays yearly are made by cycle tourists who spend €90 million annually (approx. CDN\$120 M).ⁱⁱⁱ
- New Zealand allocated NZ\$50 million (approx. CDN\$43 M) to trail development in 2009, in order to stimulate economic development and create jobs in cycle tourism sector – estimated to be worth NZ\$72 million a year (approx. CDN\$62 M).^{iv}
- USA cycling tourists account for USD\$46.9 billion annually on meals, transportation, lodging, gifts and entertainment during bike trips and tours.^v
- In Maine, cycling infrastructure investment began in 1991. Ten years later, it was estimated cycle tourism related activities added USD\$66M annually to the economy.^{vi}
- In 2012, Bicycle travellers in Oregon spent \$400 million USD (\$1.1 million/day), generating 4,600 jobs and \$18 million in local and state tax receipts. Bicycle travellers in Oregon spend approximately 20% more on average per trip than average traveller ^{vii}
- In 2014, the state of Michigan saw a total annual spending associated with bicycling events and vacations of USD\$38 million.^{viii}

Case Studies

There are a number of successful networks of businesses and organizations that provide services to cycle tourists worldwide. The majority of these established networks provide a fee-based service for members who meet a minimum set of criteria, highlighting their bicycle friendly services and amenities.

- **Bett+Bike, Germany:** Developed in the mid 1990s, it now has nearly 5,500 members. Many members are centred near the Danube River, the most popular cycling route in the world, attracting 1.5 million cyclists/year. www.bettundbike.de
- **Cyclists Welcome, Czech Republic:** The Czech Republic offers a network modelled after its German counterpart with nearly 1,100 participants included in a fee-based program. This network has an advanced website with many useful features for trip planning. www.cyklistevitani.cz or www.cyclistswelcome.eu
- **IN CANADA: Bienvenue cyclistes!, Quebec:** With 500 accommodation members in 2015, this network is administered by Vélo Québec, which also coordinates La Route Verte. www.routeverte.com

Cycle Tourism: Canada

Participation in cycling is on the increase across Canada, as more people recognize the potential of this activity as a healthy, fun and green transportation option. As consumers make this shift, cycling becomes more mainstream and is incorporated into everyday living. Making use of the bicycle as a sustainable form of transportation – to commute to work and to access holiday destinations – is becoming increasingly prevalent in Canada.

Many provinces are already experiencing positive growth in the cycle tourism sector. Examples include:

- 10.1% of Canadian adults went cycling while on a trip.^{ix}
- In 2011, the Canadian Independent Bicycle Retailers Association estimated cycle tourism contributed \$1.1 billion dollars to the Canadian economy.^x
- In Quebec, spending by cycle tourists on La Route Verte – 5,000 km of interconnected trails province-wide – is estimated at over \$134 million annually, not including spending within the bicycle trade.^{xi}
- Mountain biking activities in British Columbia's Whistler/Squamish/North Shore were valued at \$10.3 M in spending by bikers from outside the areas, in 2006.^{xii}
- The popularity of cycling the Cabot Trail in Cape Breton adds to the 2010, exit survey reporting 2% or 40,000 visitors cycled while in Nova Scotia, spending an average of approximately \$98 per person per day during their visit.^{xiii}
- The Confederation Trail in Prince Edward Island is used by 59% of visitors. Of trail users total spending estimated at \$2.8 million in 2012, \$2.1 million was generated within 30 minutes of the trail. Cyclists spending contributed 68% to that total amount.^{xiii}

Cycle Tourism: Ontario

The cycle tourism sector in Ontario is growing and is well positioned to experience continued growth in the coming years. Both the Ontario Ministry of Tourism, Culture and Sport, and Ministry of Transportation, as well as regional tourism agencies are recognizing the potential in cycle tourism, prioritizing it as a key market segment. Already, many businesses and services are experiencing growth due to an increase in sales to cycle tourists.

- Ontario has approximately 200 off-road cycling trails – included are 13,000 km of cycling trails, 5,000 km of which are off-road cycling trails.^{xiv}
- Ontario residents have a relatively high propensity to cycle while on vacations, at 8.8%.^{xv}
- In 2014, a survey showed the majority of Ontarians (54%) would prefer to cycle more.^{xvi}
- 96% of Ontario residents said that if they rode a bicycle more they would actively participate in more 'recreational cycling activities' and 48% said 'cycle tourism' in Ontario.^{xvi}
- In 2015, Share the Road Cycling Coalition had awarded 28 communities in Ontario within their Bicycle Friendly Communities Program; a community application and recognition program.
- Ontario has 330 independent bike retailers, increasing by 80 in the past 5 years.^{xvii}
- Toronto residents represent a large potential market, with 54% indicating that they cycle.
- Key motivations of Toronto cyclists when touring are to experience new and natural destinations and pursue physical activity. Bike lanes and paved off-road trails are preferred.^{xviii}
- In 2013, the Lake Erie Waterfront Trail between Windsor and Niagara launched, creating a new 620 km route connecting to the already existing 720 km+ Lake Ontario Waterfront Trail. In 2016, the Waterfront Trail will be extended an additional 170 km from Lake St. Clair to Grand Bend on Lake Huron.
- In summer 2015, the Greenbelt Route launched beginning from Northumberland County to Niagara, creating a new, fully-signed 480km route through southern Ontario's Greenbelt.
- Charity fundraising are the most popular type of cycling events in Ontario.^{xix} It is estimated there were 63 charity rides in 2014, attracting over 35,000 cyclists, raising \$37 million.^{xx}

Economic Impact

- In 2011, 12% (1.6 million) Canadian visitors (including Ontario visitors) participated in cycling activities while travelling in Ontario. These visitors spent an average of \$198 per person for a total of \$317 million. Between 2009 and 2010, the number of cycling visitors increased by 25%, spending increased by 18%.^{xxi}
- 436,000 Canadian (including Ontario residents) cycle tourists cycled in the following four areas in 2010: Toronto CMA (223K); Ottawa CMA (110K); St. Catharines–Niagara CMA (84K); and Windsor CMA (21K). The spending of these cycle tourists contributed \$104 million to the economy in 2010.¹⁴
- In 2014, 124 cyclists were surveyed in the Niagara Region. Cyclists stated that the average spend on a cycling holiday was \$1,060 over a 3 day holiday. Highest expenditure was accommodations at 37%. Food and Beverage 29%. Tourist attractions at 11% Retail 10% (Souvenirs, wine, shoes, etc.)^{xxii}
- Cycle tourists staying one or more nights in Niagara spend on average \$148, excluding accommodation. Calculated within this figure is food and beverage accounting for 61% of spending, retail purchases including wineries 27%, and attractions 12%. In this study, 68% of cycle tourists stayed one night; 18% two nights, and 14% three or more nights.^{xxiii}
- The Bike Train Initiative with VIA Rail transported 630 passengers to Niagara in 2009, these cyclists spent an estimated \$84,000 while visiting the Niagara Region.^{xxiv}
- GO Transit estimates 1,000 of its 42,000 passengers transported in 2010 (its first year of weekend service between Toronto and Niagara Falls) were cyclists. In 2014, 2,400 bikes were transported on the Toronto to Niagara Falls Seasonal Service, a 50% increase from 2010.^{xxv}

Economic Impact - Businesses In Cycle Tourism Marketplace

- Domestique Café Cyclo Sportif in Dundas served up to 500 up to cyclists per summer weekend.^{xxvi}
- Windsor Eats Wine Trail Rides generate approximately \$10,000 in local spending on each 5-6 hour sold out tour.^{xxvii}
- AquaBella B&B in Niagara-on-the-Lake saw approximately 280 cyclists stay overnight in one season, an estimated 140 room nights were booked by cyclists.
- Ashgrove Cottage, Niagara-on-the-Lake estimates 20% of rooms were booked by cyclists in 2014.
- Flyers Café in Dunnville, Haldimand County estimates more than 1,500 cyclists were served at their café between May to September 2014.
- Burning Kiln Winery in Norfolk County experienced its single largest day of retail sales in 2014, when Vélo Québec's 2014 Grand Tour stopped at their location.
- Hillier Creek Estates Winery, Prince Edward County averaged 10 cyclists a day, approximately 850 cyclists between June and September 2014.^{xxviii}

Cycling Events

There are many different types of cycling events and tours, and a growing number of them are being held across Ontario each year. It is important to know both the local area and cross-regional cycling events and tours. Individual businesses can benefit, but so too can the region by:

- Attracting cyclists and their support crew (family and friends) to the area
- Generating return visits
- Marketing your destination to cycle tourists
- Increasing visitor length of stay and spending

Each type of cycling event comes with a different set of logistical and event planning considerations; some are organized by event planners from outside of the area, while others may be based within the community. While larger scale events may require a significant amount of organizational effort, large marketing budgets and use of many community resources, both small and large events should be supported where possible, to maximize the benefits to the hosting community.

The different types of events and tours may cater to a single type of cyclist or offer a wider range of activities and attract a more diverse crowd. Types of events include:

- Racing events
- Mountain bike or BMX or specialty events
- Recreational rides
- Charity/fundraising/non-profit/community events, tours or rides
- Touring events
- Package tours

For a list of current cycling events and tours in Ontario, some of which may take place solely in your area or pass through a region, visit www.OntarioByBike.ca/events

Please note: Changes to the event listings may occur as new details are announced throughout the year. If we have missed an event in your region please contact us by email so we can make sure it is included.

Economic and Tourism Impacts of Cycling Events

Ontario is witnessing a dramatic increase in the number of cycling events hosted in the province, as well as the number of participants riding in cycling events. Cycling events play a critical role in building destination awareness, exposing participants to new cycling routes, resources and experiences. Cycling events also play a role in creating intentions for future return visits.

- In 2014, the economic impact of a single day to 2 day cycling events ranged from \$6,000 to \$1.42 million.
- 65% of event participants are 'tourists', travelling more than, 40 km from their residence. ^{xxix}
- Cycling events can generate sizeable overnight accommodation bookings. 58% of Centurion Blue Mountain participants surveyed in 2014 stayed in paid accommodation. ^{xxix}

- 42% of the 2,800 riders that participated in the Centurion Blue Mountain cycling event in 2012 had visited the area at least once prior to the event to train. The average spend per rider on event weekend was \$331.^{xxx}
- 88% of participants in Vélo Québec's 2014 Grand Tour were motivated to plan a future trip in Ontario. 80% rated Ontario as an excellent cycling destination. 73% would recommend the destination. 52% experienced Ontario for the first time.^{xxxi}
- Participants on the 2011 Great Waterfront Trail Adventure, riding the 720 km Lake Ontario trail, spent approximately \$73,000 on accommodations & food, in addition to the nightly camping and 3 meals included in registration.^{xxxii}
- One-day cyclo-cross event held in Perth, Ontario, in 2010, generated approximately \$11,000 of direct spending within the community.^{xxxiii}
- 2012's Crank the Shield mountain biking race brought 250 people over three days to Sir Sam's Ski and Bikes in the Haliburton Highlands, spending an estimated \$100,000 in the area.^{xxxiv}

Industry and Trends

Industry in Transition

- With fluctuating tourism receipts and recent challenges Ontario's tourism industry and individual businesses are looking for new opportunities and a competitive edge, reaching out to new market segments. Cycle tourism fits the bill.

Tourists' Needs and Wants Changing

- The growing "green-shift" in consumers' mindsets is driving the demand for more sustainable products and choices in Ontario and beyond.
- More consumers are looking for active, outdoor-focused adventure vacations.
- 'Urban performance' and 'city bike' sales are showing growth, 8% and 7% respectively, road bike sales have been declining for a number of years, and mountain bike sales fluctuate due to new innovations.^{xxxv}
- Ontario's strong domestic travel market continues to anchor the province's tourism industry.
- Ontario is its own largest tourist market, accounting for 85% of overnight visits.^{xxxvi}
- Quebec is Ontario's second largest market, and the USA is its third.^{xxxvii}
- Travelling within the province and "staycations" are increasingly popular.
- Cycle tourism in Ontario is poised for growth.

Who Are Cycle Tourists?

Cycle Tourists Spend More and Stay Longer

Research from Ontario and beyond consistently shows similar demographic profiles of cycle tourists.

Cycle tourists spend more

- In Australia, cycle tourists spent 1.6 times more on trip than typical tourist.^{xxxviii}
- In Quebec, spending was 1.3 times more than non-cycling tourists.^{xxxix}
- Ontario cyclists in Niagara spend an estimated average of \$1,060 on their cycling holidays (3-day holidays).^{xi}
- In Ontario, cyclist's activities generate significant revenue in communities and with local businesses, as they include accommodation, dining, visiting attractions and shopping.
 - 69% spend over \$50 per night on accommodations.
 - 81% spend over \$26 on food and beverage each day.
 - 97% spend up to 25% of their cycling holiday budget on retail activities.
 - 95% spend up to 25% of their cycling holiday budget on tourist activities.^{xli}

Cycle tourists stay longer

- In Australia, cycle tourists stayed an average 16 days compared to 8 days for the average visitor.^{xlii}
- Ontario cyclists in Niagara stay an average 3.1 days in a destination when on a cycling holiday.^{xi}
- 71% of Bike Train passengers in Ontario chose to stay overnight, when service schedule allowed for day trips.
- Depending on the region, the length of time a cycle tourist stays varies. The length of stay also depends on the type of cyclist.

Demographics and Characteristics of Ontario Cycle Tourists

Key Demographics of Ontario Cycle Tourists^{xxviii}

- *Age:* 45-64 age range is the largest market; also significant is 35-44 age range.
- *Gender:* More males are participating in cycling, but female riders are increasing.
- *Education:* Well-educated with nearly two-thirds being university educated.
- *Ability:* A larger percentage of cyclists tend to identify themselves as 'experienced' and having cycled for more than 5 years, rather than recreational or leisure riders.
- *Income:* Cyclists have higher than average household incomes.

Most Frequent Ontario Cycle Tourist

- Age 45-64, male, household income over \$100,000, well educated, experienced road cyclist, multiple cycling events annually, rides in groups of 2 to 4, travels in Ontario with bike.^{xxviii}

Ride and Travel Preferences

- 66% of cyclists travel in groups of two to four people.^{xlili}
- 59% participate in events with friends or family, with an average group size of 3 to 7 at events.^{xxix}
- 50% prefer comforts of a hotel or Bed and Breakfasts while on cycling vacations.^{xxix}

Bike Trips

- They frequently take cycling trips and/or cycle on their holidays. In 2014, cyclists took an average of 3.1 overnight cycling trips in Ontario and 1.9 overnight cycling trips outside of Ontario.^{xxix}
- They participate in other activities, with top preferences (excluding cycling) being; culinary experiences, visiting cultural sites and museums, hiking, camping, wine tasting and shopping.^{xli}
- 69% of road cyclists were most interested in self-guided road tours from community to community and 62% interested in self-guided day trips from a central hub. ^{xliv}

Case Study - Bike Train Service (2007-2009):

Data collected by the Bike Train from 2007 to 2009 show the following correlations to information collected elsewhere.

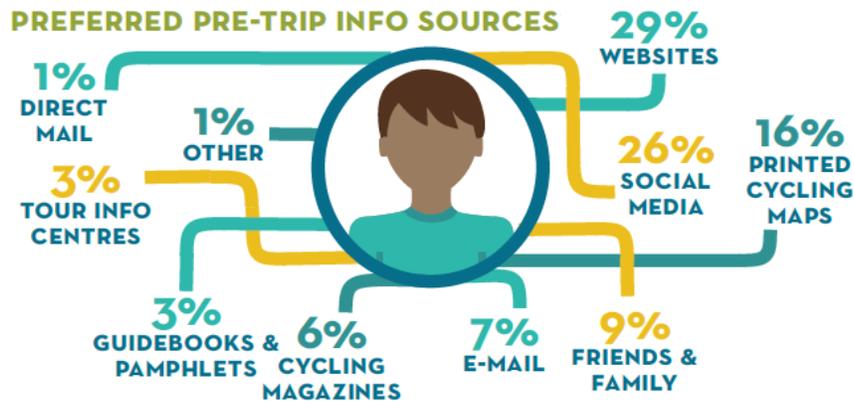
- 50% were aged 30 to 50 years
- 51% were female
- 46% have a household yearly income over \$75,000

The majority of Bike Train passengers come from the Greater Toronto Area (GTA), due to origin of service. In 2009, a growing number of users were coming from Quebec (9%) and the USA (19%).

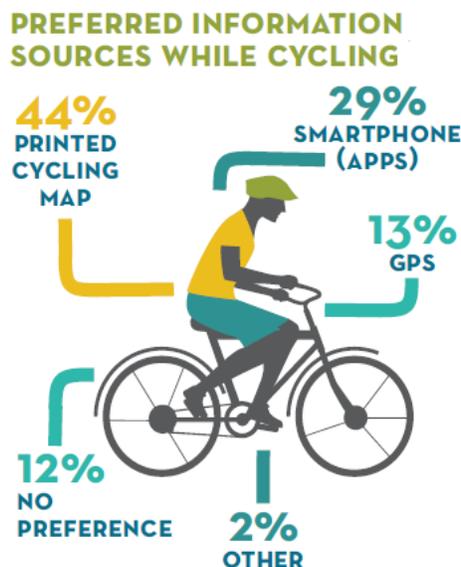
The types of accommodations Bike Train passengers chose to stay at were as follows: 35% chain hotels; 34% B&B's; 12% motels; 9% campground or hostel; 6% other hotels; and 4% friends or relatives.

How Cyclists Find and Use Cycling Information

Cyclists in Ontario prefer to use websites, social media and printed cycling maps to received marketing information during the **pre-trip planning** stages. ^{xli}



The preferred information sources **while cycling** are printed cycling maps. ^{xlii}



When choosing a cycling event to participate in, cyclists tend to use friends & family (or word of mouth) as key sources of information, followed by online resources (such as websites and web search). ^{xxix}

Types of Cyclists

Cycle tourists have a wide range of abilities and ages. They include young families, couples, groups of friends and cycling clubs, single riders, retired persons, long-distance road racers and first-time tour riders. There is fun to be had for everyone.

Generally, cycle tourists can be broken down into the following profiles:

- **Leisure/Family Cycling Market** – For individuals in this market segment, cycling is not the main purpose of their trip. Cycling is a secondary activity that they participate in while on a vacation or on a trip to visit friends and relatives. These cyclists prefer off-road cycling paths or routes, favour loops and generally travel 20 km or less in one outing.
- **Recreational Cycling Market** – Cycling is either a main reason for the trip or an important activity while on a trip. This market travels to their destination by other means (car, train, etc.), either taking their own cycling equipment or renting at the destination. This market cycles on roads (preferring paved shoulders/bicycle lanes), as well as on off-road cycling paths. Their daily cycle is generally in the range of 30–80 km, with stops to experience what the destination has to offer, enjoy lunch, etc. They tend to stay in roofed accommodation or with friends/relatives.
- **Touring Cycling Market** – This segment comprises primarily experienced cyclists whose preferred cycling experience is long-distance touring, either as a day trip or on multi-day cycling trips. Daily distances of 100 km or more are the norm. They prefer good quality paved roads with lower traffic volumes, and a variety of terrain. Stops are generally less frequent.
- **Race & Competitive Market** – These types of cyclists are experienced cyclists who may be coming to the area specifically to participate in a competitive event or race, or to train for one with a team or club. With higher than average fitness levels, these types of cyclists usually ride very expensive bicycles and enjoy long and challenging distances, preferring road routes over 100 km.
- **Mountain Biking Market** – While there are many different types of mountain biking enthusiasts, this segment tends to be made up of a younger market segment (also including those young at heart), and many of whom are seeking a thrill-riding experience over a variety of terrain and distances. Riders range from the casual to the highly technically skilled. Mountain biking – whether on single- or multi-track trails in designated, outdoor mountain bike areas with established trails or at “unofficial” biking areas known only to local enthusiasts – is becoming increasingly popular.

Types of Bikes

In addition to recognizing the types of cyclists it is also useful to know the different types of bicycles. There are many different types and as many different price tags. Here is a list of a few of the more prevalent bike types.

- **Road Bike** – This is a bicycle that is designed for riding on paved roads and is built for speed. It has drop handlebars and narrow tires and is lightweight.
- **Mountain Bike** – A bicycle that is used for off-road riding. A mountain bike will generally have a heavy-duty frame and knobby tires.
- **Hybrid Bike** – A hybrid bicycle is a mix between road and mountain bike and is designed for general purposes, cycling on either paved or unpaved roads or trails.
- **Recumbent Bike** – This type of bicycle places the rider in a reclining position. There are many different styles of recumbent.
- **Tandem Bike** – A bicycle built for two people, one sitting behind the other.

Ontario Cycle Tourism Research

Transportation Options and Ontario By Bike regularly conduct and collate relevant cycle tourism research and make these resources available to tourism and industry partners, as well as the participating businesses. Research on the growth, trends and economic impact of cycle tourism and cycle tourists in Ontario can be found at www.transportationoptions.org/research

In 2015, a 24-page Ontario cycle tourism industry report was published and includes 2014 primary research and information from over 35 sources. The report highlights many of the opportunities and economic impacts that businesses, municipalities and regions are experiencing when catering to this growing market and tourism sector right here in the province of Ontario.

A copy can be downloaded at www.OntarioByBike.ca/from-niche-to-now



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