



- Prince Edward County - Cycle Tourism Regional Research Report

December 2016

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About The Study and Report

Recognizing the need for further research on the impact of cycle tourism in Ontario, [Ontario By Bike/Transportation Options](#), initiated a multi regional cycle tourism research study in 2016. Partnering with 3 Regional Tourism Organizations (RTO's), the following 3 sub-regions were selected to participate:

- RTO1 – City of Windsor, Essex County
- RTO3 – Halton Region
- RTO9 – Prince Edward County

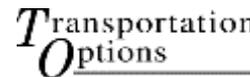
Working with research partner [RMCG Inc.](#), methodology was developed as documented in each section throughout the report, with data collected using and looking at: trail counts and intercept interviews; business surveys; marketing and promotions; cycling event surveys; and other cycle tourism impact indicators.

Two prime study objectives were: To enhance the competitiveness of the cycle tourism sector through increased knowledge and research; and to build regional capacity and support rationale for further cycle tourism product development and related economic development. An additional objective of the study has been to create a regional research template to be a benchmark for longitudinal and comparable regional studies.

Study Partners:



Bay of Quinte • Prince Edward County • Land O'Lakes
Rideau Heritage Route • Kingston • 1000 Islands
Cornwall and The Counties



Regional Partners: Tourism Windsor Essex Pelee Island, City of Windsor, Essex County Conservation Authority, Bike Windsor Essex, Share the Road Essex County; Halton Region, City of Burlington, Tourism Burlington, Town of Oakville, Town of Halton Hills; The Corporation of the County of Prince Edward

We would also like to thank all the businesses, event coordinators and partners who shared information and data contributing to, and supporting this study

Regional Overview & Highlights

The following are key cycle tourism findings from the research conducted during the Cycle Tourism Regional Research Study in Prince Edward County. Full data source descriptions and analysis are presented for each major report section.

Counters & Intercepts

- Information gathered, points to an increased number of cyclists on weekends and holiday's
- Average weekly number of cyclists at count locations: 136 County Road 18 (September data only); 27 cyclists in 4 hours Loyalist Parkway, (manual count)
- A larger number of cyclists are visitors, with the County drawing cyclists equally from eastern Ontario and areas west of the County. Some cycle tourists are on multi-day long distance tours, following the Waterfront Trail

Business Surveys

- 32% of respondents indicated business from cyclists increased in 2016 from previous year, 55% felt it stayed the same
- 48% of businesses indicated cyclists were either a core or regular part of their business
- Recreational cyclists followed by leisure/family cyclists perceived as most frequent type of cycling customer
- Long haul cyclists followed by regional cyclists reported as most frequent type of cyclist, with 11 of 31 businesses indicating some international cyclists served in 2016
- 585 cyclist nights estimated from 13 accommodators, indicating cyclists are generating modest-strong bookings for accommodators in Prince Edward County
- Wineries witnessed large numbers of cycling customers in 2016

Regional Overview & Highlights (Continued)

Cycling Event Surveys

- MS Bike PEC event drew significant tourists to the area (99% >40 km) and generated valuable overnight stays with 69% staying at least 1 night, of which 73% were in paid accommodation
- Kiwanis Colour Cribbage Ride event drew significant tourists to the area (95% >40km), yet generated fewer overnight stays with only 14% staying at least 1 night
- Largest number of participants for cycling events came from eastern Ontario, while central Ontario and Toronto remained strong markets
- Participants in events surveyed indicated strong likelihood to return to Prince Edward County and also to recommend the region to family/friends
- Local food service providers such as cafes and restaurants were the most frequented businesses by cycling event participants in Prince Edward County

Marketing & Promotions

- Limited online cycling content with support from other marketing channels
- Significant print cycling resources available in Prince Edward County, with approximately 12,000 local and regional cycling maps distributed in 2016
- 80 total Ontario By Bike certified bicycle friendly businesses



Report Section:

Counters & Intercepts

Methodology: Counters & Intercepts

Counters

- [Eco-Counter](#) Mobile TUBES were installed by County or Municipal staff, on a mix of regional/county roads and trails used by cyclists. The installation facilitated automated counts
- Count periods ranged from 4 to 6 weeks. Each region had a minimum of 2 count locations set
- Data was analysed using Eco-Visio, Eco-Counters' online platform, specifically designed to analyze cyclist count data



Cyclists Intercept Surveys

- To learn more about cyclists, intercept interviews were conducted at most count locations for 3 to 4 hour periods. Intercept surveys contained 4+ questions
- Data was collected on: direction, party size, postal code, distance from home range, day vs overnight trip, number of overnights
- Limitations were small sample size of cycling parties and number of survey times
- Surveys were intended to capture a profile of cyclists at each counter location and sense of cycling market. They were not intended to be a full representative sample, as that was not within the scope of the project



Trail Counter: Country Road 18, Prince Edward County

- Placed on quiet country paved road close to Sandbanks Provincial Park. Road included on several mapped looped routes in area. Nearby attractions include: Sandbanks Provincial Park, beaches, dunes, Lake Ontario, wineries, culinary and cultural attractions, towns of Wellington, Bloomfield, Picton.
 - Total number of cyclists during 4 week period: 543
 - Average count per week: 136 (Busiest day – Sunday)
 - Daily count range: 3 to 72
 - Weekday average: 14
 - Weekend average: 32



Based on 4 week period (02/09/2016 - 29/09/2016)
Count=number of cyclists riding in either direction
No sizeable difference in counts by direction

Cyclists on County Road 18, Prince Edward County

Based on data analysed from: trail counts; Ontario Parks, Park Statistics Report 2010; and Park Superintendent anecdotal comments 2016. No interview survey samples available for this location.

- Counter located near front gate of 4th most popular provincial park in Ontario, with over 600,000 annual visitors, and 549 campsites. Park recently upgraded in-park trail network and increased cycling facilities
- Park noting anecdotal increase in number of visitors arriving with bikes, particularly visitors from Quebec
- Majority of cyclists passing counter were doing so earlier in day (9 to noon most frequent) but also steady, although lower counts, throughout day
- There were more weekend cyclists, with counts double that of weekdays
- Significant long weekend number of cyclists (e.g. Labour Day weekend)
- Counter set in September, after peak summer season, which may have affected count data. September weekend weather impacted number of cyclists



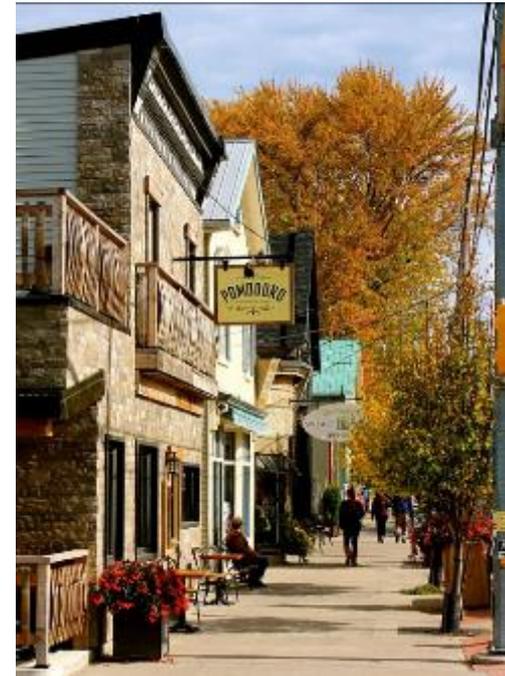
Trail Counter: Loyalist Parkway, Between Wellington & Bloomfield

Interviewed 10 cycling parties, 14 cyclists on July 24 & 31 (Sun), to capture a sense of the cycling market:

- 10 of 14 cyclists were visiting from >40km, including 6 cyclists visiting from >100km away
- Overnight stays in the County ranged from 1 to 2 nights, those cyclists from >100km all stayed overnight
- Loyalist Parkway is part of the Lake Ontario Waterfront Trail, 1,600km signed route across Ontario
- Local cyclists travelled in parties of 1, most were experienced riders training
- There were 2 parties, 3 long distance cyclists riding for up to 7 nights, with planned stops on their route in Prince Edward County. One party had a support vehicle with vacationing family following riders
- During this period, cyclists were all from Ontario: St Catharines and GTHA in west, Cornwall and Ottawa in the east

Automated count data collected, but deemed unusable due to equipment malfunction. Manual counts at time of intercept interviews at this location logged:

- 11 cyclists in 8 parties over 3 hours, Sunday July 24
- 27 cyclists, 18 parties over 4 hours, Sunday, July 31





Report Section:
Business Surveys

Methodology: Business Surveys

Ontario By Bike Network registered and certified bicycle friendly business locations in each participating region were invited to share their experiences with cycling customers in 2016 via an online survey.

Methodology

- All Ontario By Bike certified locations were provided advance notice of planned post season survey and copy of questions in May 2016
- The online survey was sent to Ontario By Bike certified bicycle friendly locations in each region beginning of October 2016
- In some regions, an invitation / reminder to participate in survey was sent from local DMO to Ontario By Bike registrants
- Follow up phone calls were made by Ontario By Bike to individual locations between October 21 - November 1, 2016

Survey Questions Sought Information On:

- Level of business from cyclists
- Level of business change from previous year
- Type of cycling customers
- Distance from permanent residences
- 10 questions, between 3-5 minutes to complete



The image shows a screenshot of an email survey reminder. At the top, there is a logo for 'Explore Ontario By Bike' with the tagline 'Step off bicycle friendly places to eat, visit & shop'. The email body starts with 'Hello,' followed by a thank you message for those who have already completed the survey. It then states: 'This is a final reminder for Prince Edward County businesses to complete the survey below, which should take no more than 3 minutes of your time.' The email explains that Ontario By Bike / Transportation Options is conducting a regional cycle tourism study to help better understand this growing market in Prince Edward County. It asks recipients to be part of the study and share their perspective on the growth and impact of cycling and cycle tourism on their business. A yellow box highlights the 'Complete Survey' button. Below this, there is a row of four small images showing various cycling-related scenes: a person on a bicycle, a building, a person on a bicycle, and a person on a bicycle. The email also includes a deadline for survey completion: 'October 20th, 2016'. At the bottom, there is a thank you message for participating in the research initiative, contact information for Louisa Mursell and Michael McCreech, and the Ontario By Bike website and contact details.

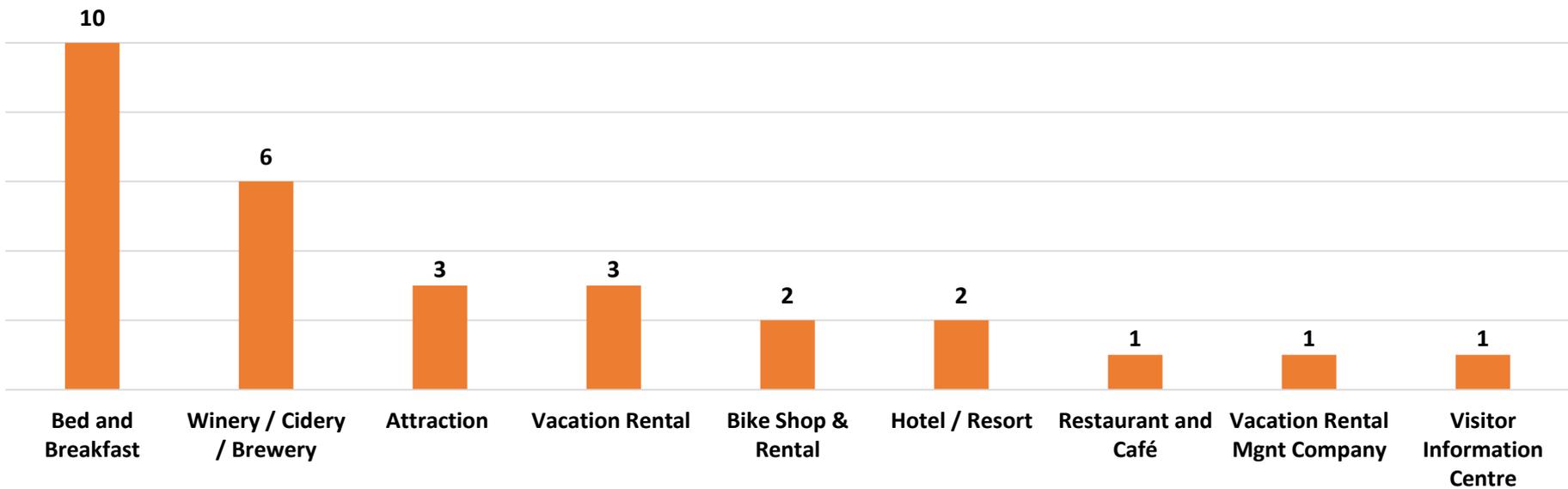
Types of Regional Businesses

- Invited 80 businesses and locations to participate in online survey, all registered Ontario By Bike locations in Prince Edward County
- 31 businesses responded (39% response rate)
- Good representation from across tourism industry. Strong response, particularly from B&Bs and wineries in Prince Edward County (PEC)



Credit: The Great Waterway

Types of Businesses (N = 31)



Cycle Business Activity 2016

Business Type	# of Cyclists*
Attractions	4-25
Bed & Breakfasts	4-100
Bike Shops & Rental	300-10,000
Hotel / Resort	10-25
Restaurant and Café	20
Vacation Rentals / Rental Mgmt. Company	4-200
Visitor Information Centre	3,000
Winery / Cidery / Brewery	100-1,200

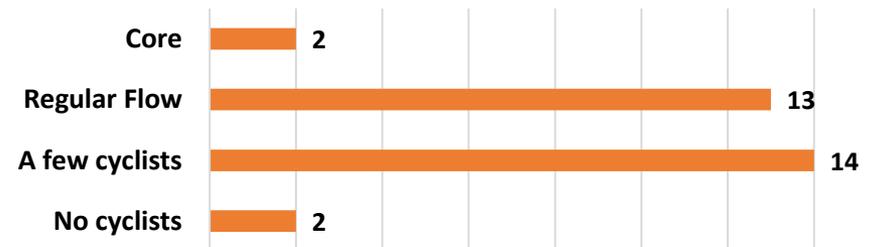
48% of businesses indicated cyclists were either a 'core' or 'regular' part of their business

- 13 businesses indicated a 'regular flow of cyclists' and could count on some cyclists each week
 - 1 winery indicated a total of 1,200 cyclists throughout the cycling season, while another winery indicated 50-60 cyclists/week (between May-Sept)
 - 1 bike shop served an estimated 10,000 cyclists in 2016

For 13 responding Prince Edward County accommodators, 585 cyclist nights can be estimated (# of cyclists X # of nights)

- A vacation rental management company estimated their properties had 200 cyclists nights in 2016
 - 2 B&B's indicated 130 / 150 cyclists nights respectively in 2016
 - Only 1 of the 13 accommodators indicated they had no business from cyclists in 2016

Business from Cyclists in 2016 (N = 31)

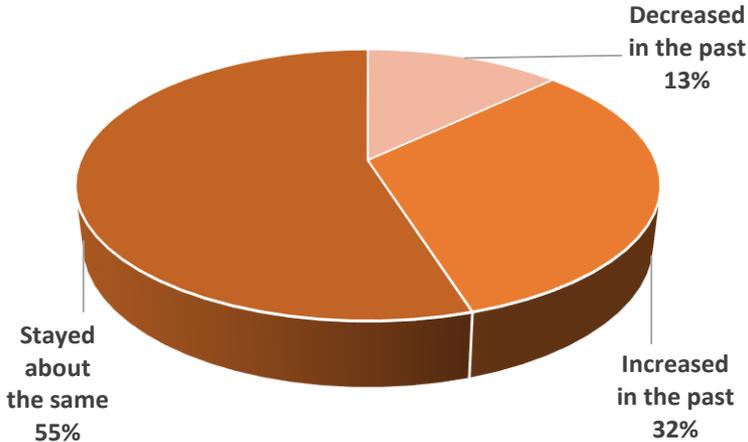


* Estimated cyclists in 2016

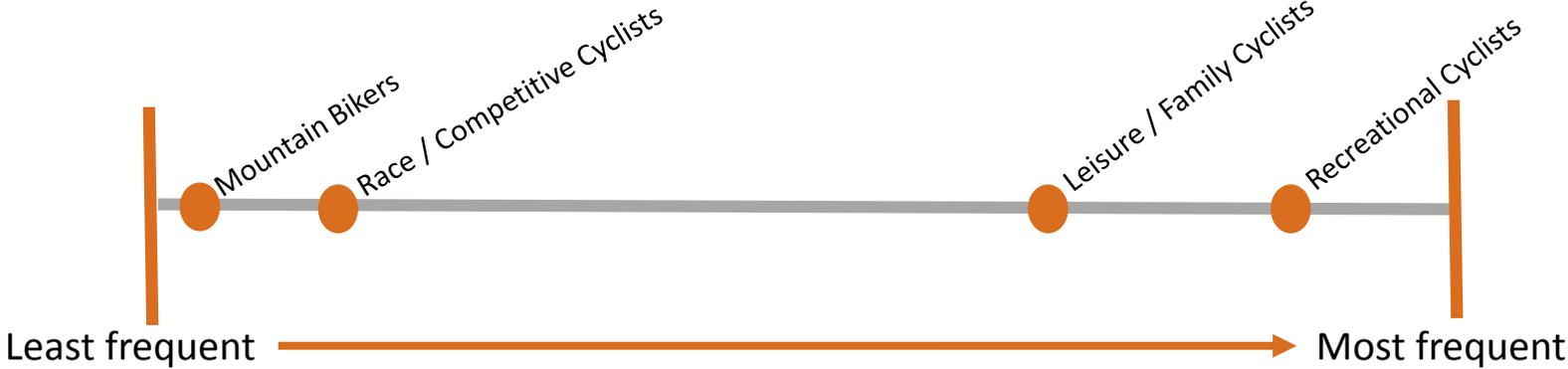
Cycle Business Trends and Type of Cycling Customers

- 32% felt cycling business increased in past year, while 55% indicated business from cyclists stayed the same
 - 4 wineries, a visitor information centre and a bike shop/rentals all indicated an increase in cycling business in past year
 - 3 B&B's and an attraction indicated a decrease in 2016
- 13 businesses indicated 'recreational' cyclists were their 'most frequent' cycling customers
- 9 businesses indicated 'leisure / family' cyclists were their 'most frequent' cycling customers
- 9 businesses indicated 'race / competitive' cyclists were their 'least frequent' cycling customers
- 18 businesses indicated they didn't serve 'mountain bikers' in 2016

Cyclists Business 2015-16 (N = 31)



Type of Cycling Customer (N = 31)

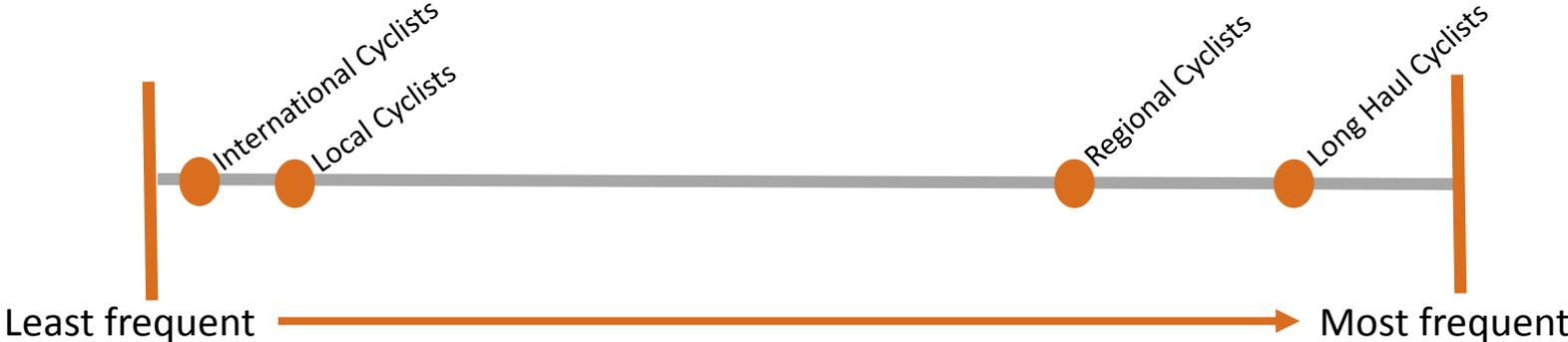


Origin of Cycling Customers

When asked to rank their most frequent cycling customers' place of origin....

- 20 businesses indicated 'long haul' cyclists (> 100 km) were their 'most frequent' cycling customers
- 3 businesses indicated 'regional' cyclists (40-100 km) were their 'most frequent' cycling customers
 - An additional 13 businesses indicated 'regional' cyclists (40-100 km) were 'frequent' cycling customers
- 14 businesses indicated they didn't serve 'local' cyclists (< 40 km) in 2016
- 11 businesses indicated they served 'international' cyclists in 2016

Frequency of Cyclists from Residence (N = 31)





Report Section:

Cycling Events & Tourism Impact Surveys

Methodology: Cycling Events & Tourism Impact Surveys

Post-Event Rider Survey

- Worked with event organizers to build and distribute online survey
- Surveys left open for a 2-4 week duration. Some event organizers sent out reminder emails, while others sent out only one request to event participants
- Collected data on: Distance from home, postal code, day vs overnight trip, number of overnights, likelihood to return, likelihood to recommend. *Note: Core required questions were included, however some event organizers asked differently worded questions for their own purposes. Relevant data was included in report where available*
- Take caution when interpreting some event results due to small sample sizes

Event Registration Information

- Event organizers provided non-confidential registration information for all participants including postal codes. Registration data was incorporated and marked with asterisk when used



Prince Edward County – Cycling Events Overview



- **Name:** Rotary Lilac Ride
- **Location:** Picton
- **Date:** May 29th, 2016
- **Type:** Charity (Recreational / Experienced)
- **Distance/Events:** 27 km, 57 km, 100 km
- **Registered Riders:** 98
- **Survey Response Rate:** N/A (No Survey Sent)
- **URL:** portal.clubrunner.ca/1145/SitePage/rotary-lilac-ride



- **Name:** MS Bike Tour (PEC)
- **Location:** Picton
- **Date:** July 10th, 2016
- **Type:** Charity (Recreational / Experienced)
- **Distance/Events:** 40 km, 75 km
- **Registered Riders:** 227
- **Survey Response Rate:** 42 (19%)
- **URL:** www.msbike.ca/ontario



- **Name:** Kiwanis Colour Cribbage Ride
- **Location:** Picton
- **Date:** September 25th, 2016
- **Type:** Charity (Recreational / Experienced)
- **Distance/Events:** 25 km, 50 km, 100 km
- **Registered Riders:** 132
- **Survey Response Rate:** 33 (25%)
- **URL:** www.pictonkiwanis.org/Page/15512

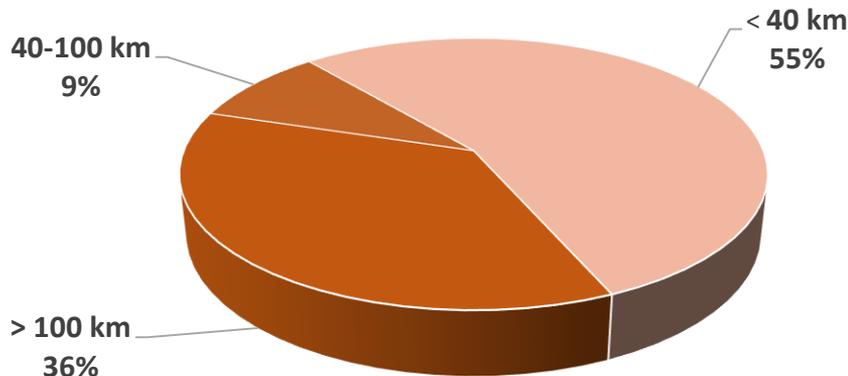


Rotary Lilac Ride – Event Analysis (Registered Riders: 98)

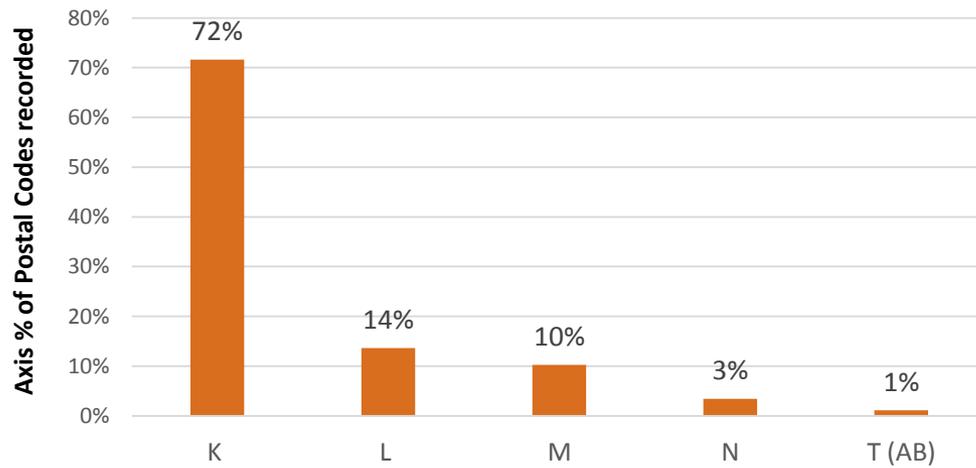


- 45% considered tourists (> 40 km), 36% travelled > 100 km
- 72% came from eastern Ontario, 13% from central Ontario and 10% from Toronto*

Distance from Permanent Residence* (N = 88)



Postal Codes* (N = 88)



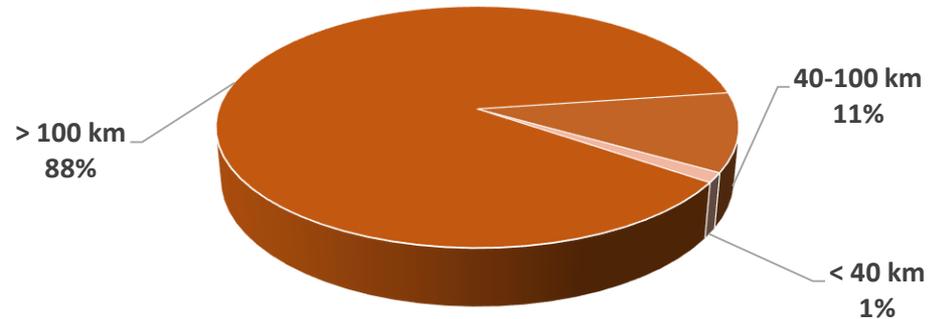
* Registration Data



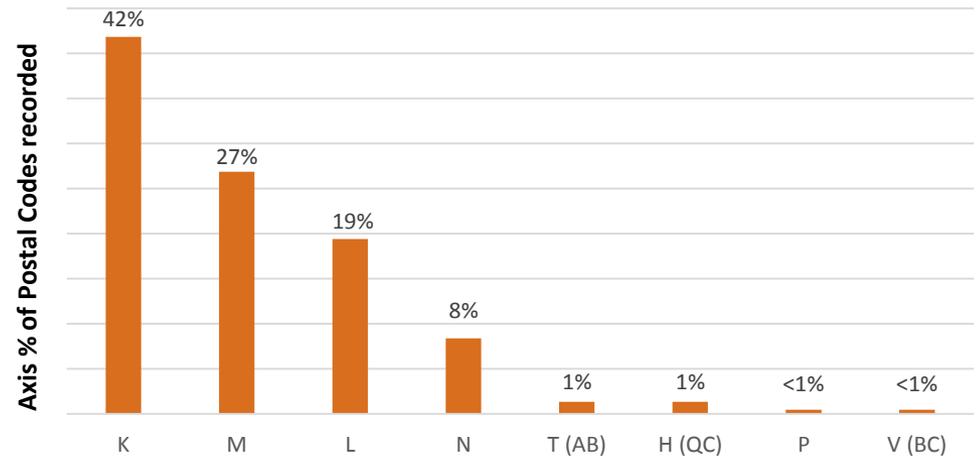
MS Bike Tour (PEC) – Event Analysis (Registered Riders: 227)

- 99% considered tourists (> 40 km), 88% travelled > 100 km
- 42% came from eastern Ontario, 27% from Toronto and 19% from central Ontario*
- 7 participants from out of province*
- Female (58%) : Male (42%) split (N = 36)
- 62% consider themselves as 'Experienced' cyclists, while 35% stated 'Recreational' (N = 36)
- 54% were aged 55+ (N = 37)

Distance from Permanent Residence* (N = 227)



Postal Codes* (N = 227)

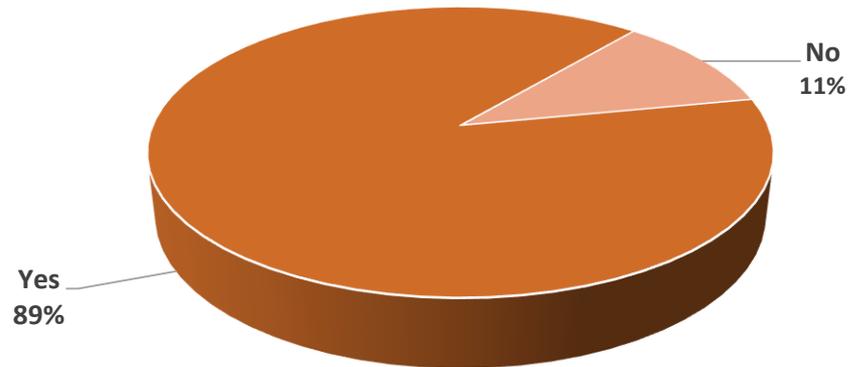


* Registration Data

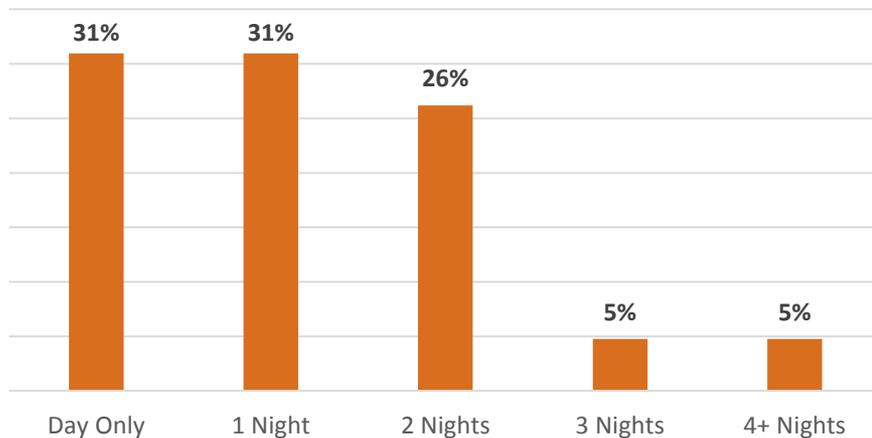


- 89% intend to return to Prince Edward County in the next two years
- 100% indicated they would be 'Very likely' or 'Somewhat likely' to recommend Prince Edward County to friends and family
- 69% stayed overnight, of which 73% were in paid accommodation. Only 31% coming for the day (N = 42)

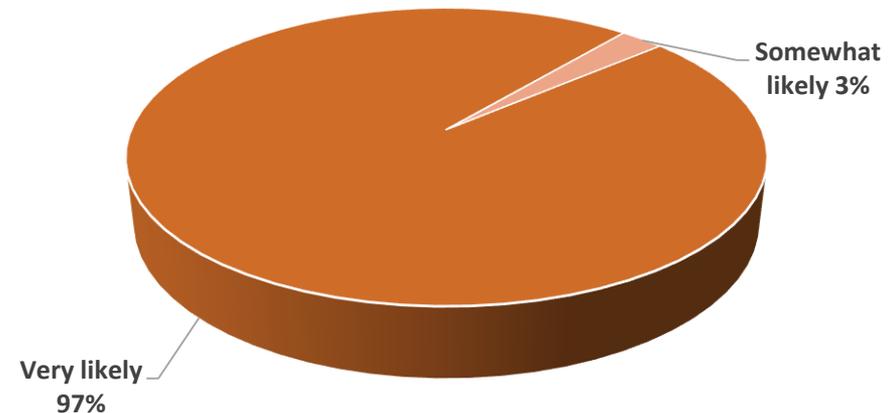
Likelihood to Return (N = 36)



Length of Stay (N = 42)



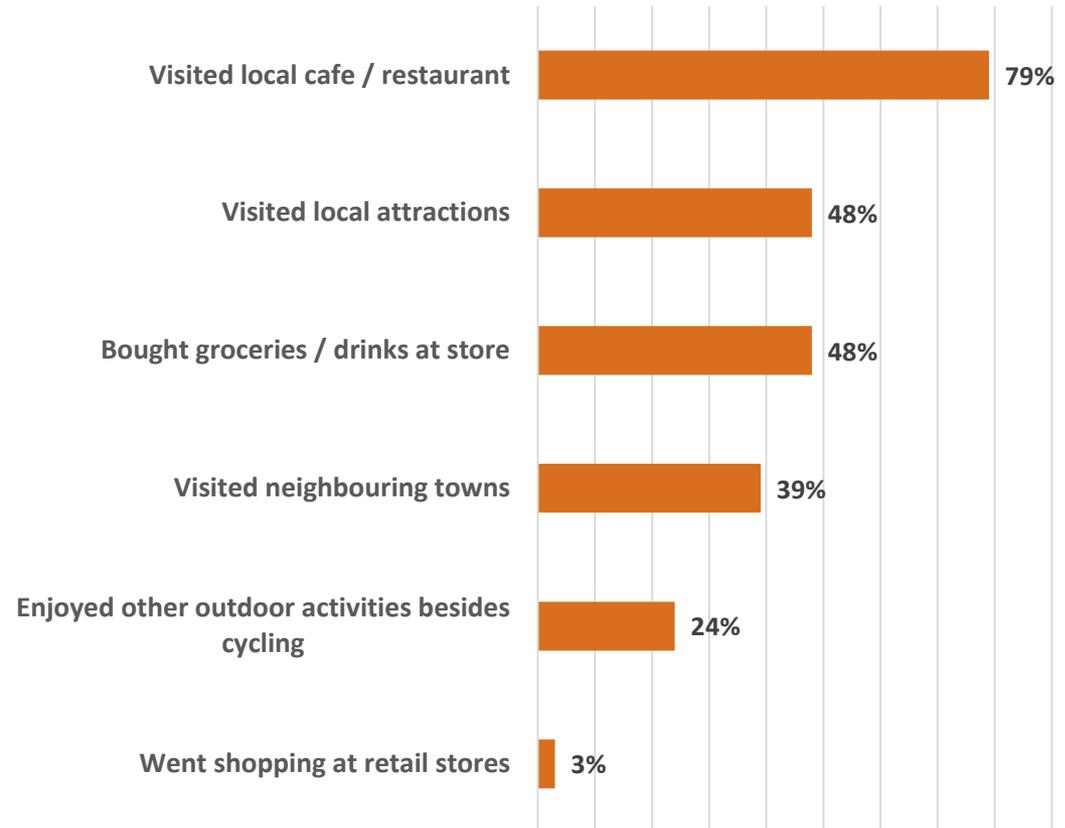
Likelihood to Recommend (N = 38)



- Top three activities as indicated by participants:
 - Visiting local café / restaurant
 - Visiting local attractions
 - Purchasing groceries



Participant Activities (N = 30)

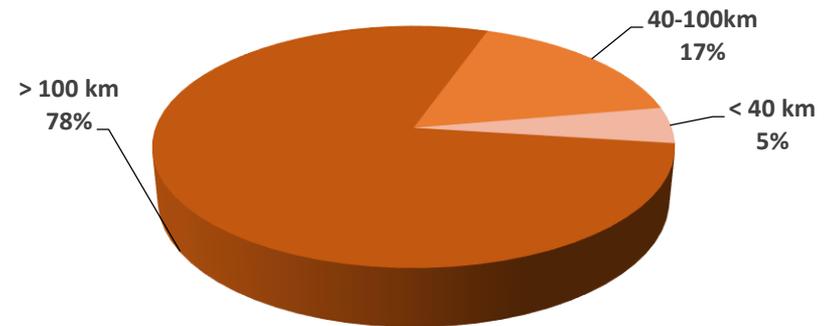


Kiwanis Colour Cribbage Ride – Event Analysis (Registered Riders: 132)

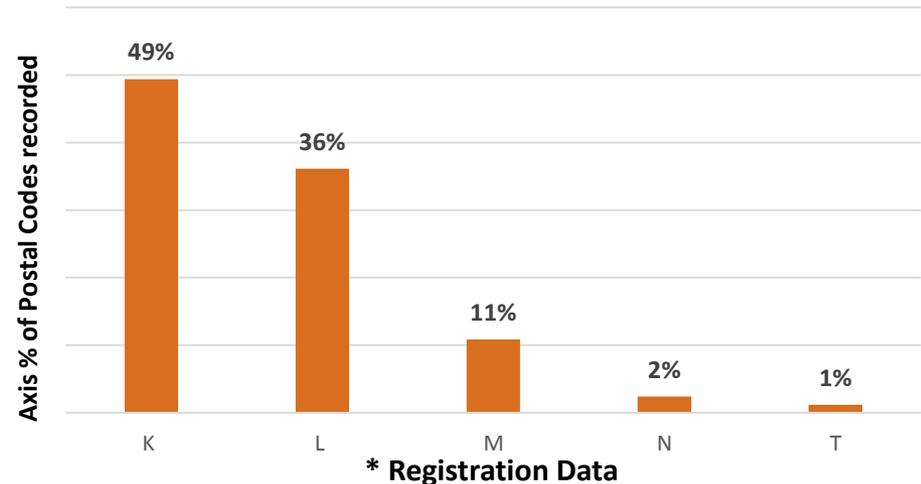


- 95% considered tourists (> 40 km), 78% travelled >100 km
- 48% came from eastern Ontario, 36% from central Ontario and 11% came from Toronto*
- Female (57%) : Male (43%) split (N = 30)
- 74% were aged 45-64 (N = 30)
- 73% consider themselves 'Experienced' cyclists (N = 30)

Distance from Permanent Residence* (N = 83)



Postal Codes* (N = 83)

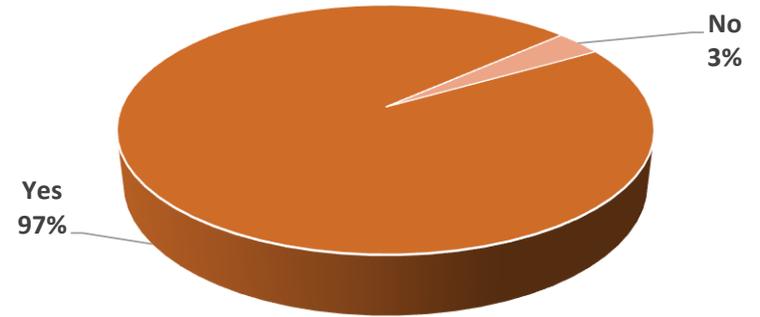


Kiwanis Colour Cribbage Ride – Event Analysis (Registered Riders: 132)

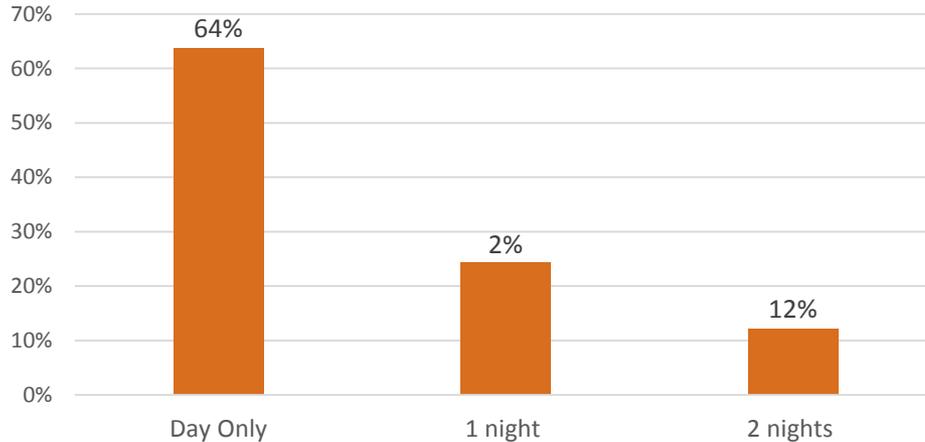


- 97% intend to return to Prince Edward County in the next two years
- 100% 'Very likely' or 'Somewhat likely' to recommend Prince Edward County to friends and family
- 64% came for the day. 14% stayed overnight, of which 44% were in paid accommodations

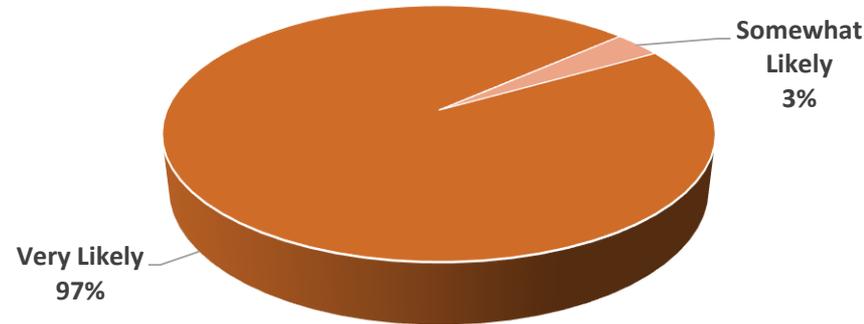
Likelihood to Return (N = 30)



Length of Stay (N = 31)



Likelihood to Recommend (N = 30)



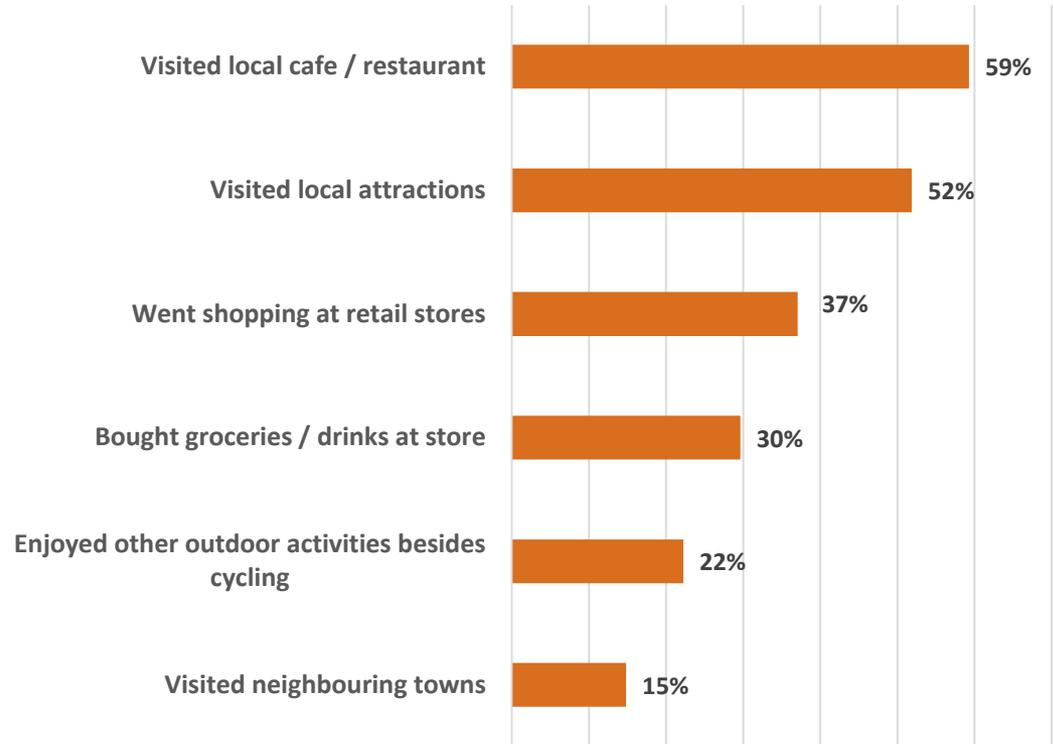
Kiwanis Colour Cribbage Ride – Event Analysis (Registered Riders: 132)



- Top three activities as indicated by participants:
 - Visiting local café / restaurant
 - Visiting local attractions
 - Shopping at retail stores



Participant Activities (N = 27)





Report Section:
Marketing & Promotions

Methodology: Marketing & Promotions

- In October, Ontario By Bike asked DMO's, RTO's and relevant partners and organizations to share data on cycling marketing and promotional activities
- Information from a range of marketing and promotional channels was shared and included data on both digital and print assets
- The variety of data supplied included: total visits and page views on webpages with cycling content; website downloads of cycling itineraries and maps; distribution of printed cycling maps; paid media and advertising reach; physical visits to information centre; and other engagement metrics both online and in person
- Data supplied also varied by dates to include full year until November and in some instances just summer months, June through September



Websites with Cycling Content

The Great Waterway (RTO9) www.thegreatwaterway.com

- 2,201 total pageviews to pages with cycling-related content (Nov 2015 – Nov 2016)



Visit The County www.prince-edward-county.com/cycling

- 5,926 total visits to webpage with cycling content (June - Sept 2016)



Ontario By Bike Great Places to Cycle www.ontariobybike.ca/thegreatwaterway

- 2,951 total visits (Jan – Nov 2016)
- Time on Page – 2:31 minutes
- 139,742 total visits to Prince Edward County business listings (since Feb 2011)
- 80 total number of certified bicycle friendly business listings (Nov 2016)



Note: There are additional websites with cycling and cycle tourism content for region that are not included above

Cycling Maps

Print Editions

The Great Waterway (RTO9)

The Great Waterway Cycling Map

- 3,500 English and 1,000 French distributed 2016

Bloomfield Bicycle Company

Cycling Map: Guide to Cycling In the County

- 5,000 distributed annually

Prince Edward County Chamber of Commerce

County Cycling Map

- 1,500 to 2,000 distributed (Jan – Oct 2016)



Other Marketing Channels and Promotions – Blog

The Great Waterway (RTO9)

- 1,012 total visits to blog featuring cycling in Prince Edward County (Nov 2015 – Nov 2016)





Report Section:
Cross Regional Overview

Cross Regional Overview

The following observations were made incorporating the research from the 3 participating regions. To view all 2016 Regional Cycle Tourism Research Reports visit: www.transportationoptions.org/research

Counters & Intercepts

- A number of designated routes and trails where counters were installed showed a large number of cyclists were making use of facilities, especially in urban areas
- In all count locations Sunday's proved to be day with highest number of cyclists
- Installation of counters to monitor cycling activity provided valuable data for partners. Longitudinal tracking and further analysis would be beneficial
- Intercept interviews showed that at all count locations there was a small, but varying percentage of cyclists that were tourists (>40 km from permanent residence) to region
- Intercept interviews in conjunction with counters provided the most useful insights for tourism impact assessments. Study resources limited intercepts, but consideration for the collection of a more representative sample should be included in future studies

Business Surveys

- The cycle tourism business survey sent to Ontario By Bike Network businesses yielded good to very good response rates (39%-65%) and provided valuable insights. Annual tracking is recommended
- In all regions, majority of businesses reported an increase in cyclists or same as last year, very few experienced a decrease
- Local and regional cyclists were generally the primary cycling customer base, with some reporting a good number of long-haul cyclists. Several regions had a significant number of businesses that served international cyclists
- Recreational and leisure cyclists were the most frequent customer type in all regions

Cross Regional Overview (Continued)

Cycling Events & Tourism Impact Surveys

- Many cycling events drew significant numbers of tourists, participants from >40km to host regions
- Cycling events varied and not all should be considered tourism-oriented. The ability of event to attract cycle tourists appeared to be dependent on a number of factors including event size and format
- Some events attracted riders to train or be oriented to area prior to the event and therefore generated additional tourism impacts
- Cycling events can create strong likelihood for participants to recommend the destination to others and to return to ride and visit the area in the future
- Cycling event participants participated in other activities, most frequently visiting local food service providers such as cafes and restaurants followed by a varied range of other activities
- Cycling event surveys provided valuable insight into type of participant and tourism potential, and consistent annual tracking can further build cycling events as tourism opportunities for regions

Marketing & Promotions

- All regions and destinations have dedicated cycling pages on their websites, with varying levels and types of cycling content
- Dedicated cycling pages, with product/experience-specific content (sub-pages or blogs posts), supported by integrated marketing campaigns created strong engagement with consumers and were effective at building on/off-line audiences. Regions without this approach were not seeing as much digital and hence trackable activity
- Some regions were distributing significant quantities of print cycling maps, collateral proved to be popular with cyclist, further supporting cycle tourism promotion
- Ontario By Bike certified bicycle friendly business listings offered valuable online exposure for local businesses
- Marketing and promotions data can be further standardized and easily collected annually for analysis and comparison

Other Cycling Indicators

- While data available ranges across regions, there were a number of valuable metrics that can be accessed to provide tourism indicators
- Some data already recorded annually, like Ontario Ferries tracking, provided a good annual benchmark of cycling activity



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- Prince Edward County -
**Cycle Tourism Regional
Research Report**

December 2016



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