Ontario By Bike®

- Windsor / Essex County -
Cycle Tourism Regional Research Report

December 2016

Transportation Options

www.TransportationOptions.org

rmcg

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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:

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

To view all 2016 Regional Cycle Tourism Research Reports visit: www.transportationoptions.org/research

Regional Overview & Highlights

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

Counters & Intercepts

- Windsor's waterfront trail counts showed the trail is well used by cyclists daily
- Trail counts on Chrysler Greenway indicated trail is used but at a different scale, due to its more rural setting
- Average weekly number of cyclists at count locations: 7,370 Waterfront Trail, Windsor; 859 Chrysler Greenway, Kingsville.
- While the majority of cyclists on both trails were local, visiting cyclists were on multi day trips

Business Surveys

- 79% of respondents indicated business from cyclists increased in 2016 from previous year, 21% felt it stayed the same
- 63% of businesses indicated cyclists were either a core or regular part of their business
- Recreational cyclists followed by leisure/family cyclists were perceived as most frequent type of cycling customer
- Local cyclists followed by regional cyclists reported as most frequent type of cyclist, with 11 of 19 businesses indicating some international cyclists served in 2016
- 581 cyclist nights estimated from 7 accommodators, indicating cyclists are generating strong bookings for accommodators in Windsor Essex.
- An estimated 3,000 cyclists visited Point Pelee National Park in 2016

Regional Overview & Highlights (Continued)

Cycling Event Surveys

- Great Waterfront Trail Adventure (GWTA) multi day touring cycling event drew significant tourists to the area, (98% >40 km) and generated 78 additional overnight stays for region, beyond those included in event registration
- Canada South Coast Bike Tour (CSCBT) was a more local event (8% >40 km) and generated no overnight stays
- Participants in events surveyed indicated strong intentions to return and recommend destination to family/friends
- Local food services such as cafes and restaurants were the most frequented types of businesses by cycling event participants in Windsor Essex

Marketing and Promotions

- Strong online cycling presence combined with cycling featured in numerous other marketing channels and promotions
- Paid media and advertising supported online cycling content
- High engagement from consumers on cycling content through e-newsletters
- Strong distribution of printed resources, with approximately 30,000 cycling maps distributed in 2016
- 29 total Ontario By Bike certified bicycle friendly businesses

Other Cycling Indicator

- 8,250 total bicycles transported on Pelee Island ferry services between April-September 2016 (+31% since 2014)

Report Section:

Counters & Intercepts

Methodology: Trail Counters & Intercepts

Trail Counters

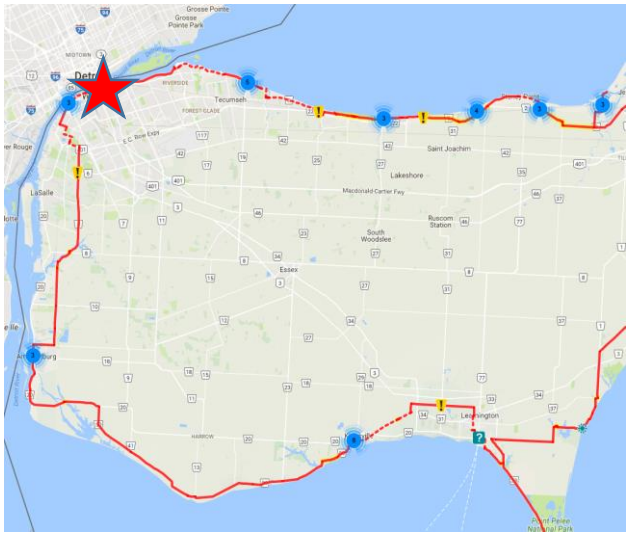
- Eco-Counter Mobile TUBES were installed by County or Municipal staff, on a mix of regional/county roads and trails used by cyclists. The installation facilitated automated counts
- Count periods ranged from 4 to 6 weeks. Each region had a minimum of 2 count locations set
- Data was analysed using Eco-Visio,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

Cyclists Intercept Surveys

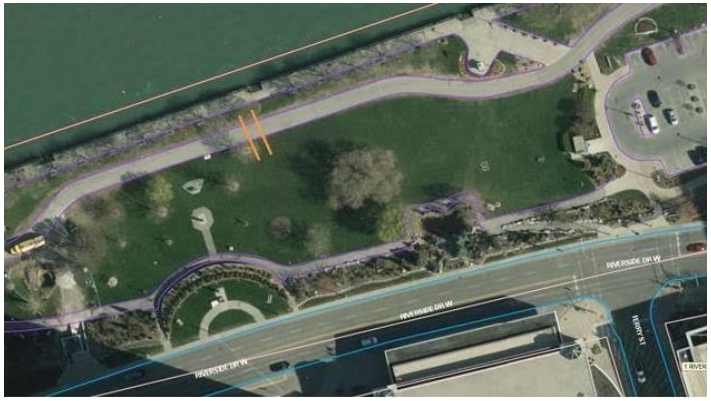
- To learn more about cyclists, intercept interviews were conducted at most count locations for 3 to 4 hour periods. Intercept surveys contained 4+ questions. Data was collected on: direction, party size, postal code, distance from home range, day vs overnight trip, number of overnights
- Limitations 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: Roy A Battagello River Walk, Windsor Waterfront

- Placed on off-road multi-use 8km paved trail following river. Nearby attractions include: Downtown Windsor, parkland, sculpture park, scenic views of Windsor, river and Detroit, casino, Ambassador Bridge.
  - Total number of cyclists during 6 week period: 44,222
  - Average count per week: 7,370 (Busiest day – Sunday)
  - Daily count range: 434 to 1,785
  - Weekday average: 1,045
  - Weekend average: 1,072



Based on 6 week period (08/08/2016 - 18/09/2016)
Count=number of cyclists riding in either direction
No sizeable difference in counts by direction



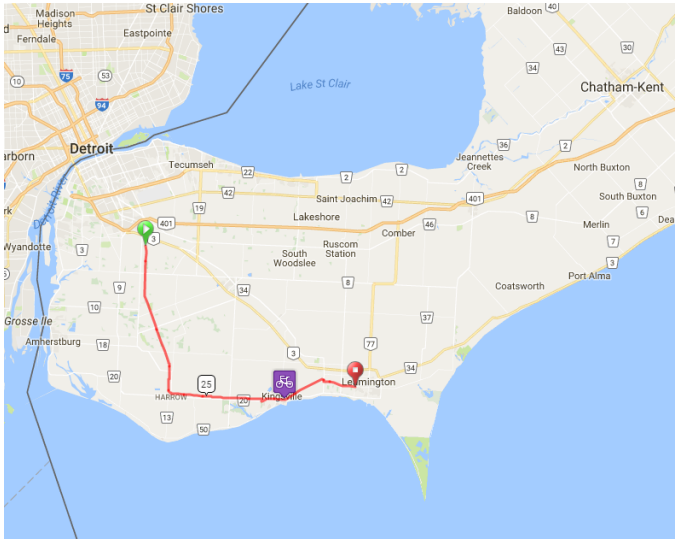
Cyclists on the Windsor Waterfront

Interviewed 62 cycling parties, 83 cyclists total, on September 9th (Fri), 10th (Sat) and 16th (Fri) to capture a sense of the cycling market:

- 78 of 83 cyclists surveyed were local cyclists and on trail for day trip, 5 were visitors from >40km
- This trail is heavily used throughout week by commuters and recreational cyclists
- 37 of 83 cyclists were in party size of 2 or more
- Cyclists visiting from >100km were staying 3 to 4+ nights
- Trail is part of the Lake Erie Waterfront Trail, 1,600km signed route across Ontario
- During these periods, trail attracted cyclists for multiple night cycling trips from central/southwestern Ontario: Toronto, Hamilton, Kitchener. One cyclists was from Costa Rica. There were no cyclists from U.S.

Trail Counter: Chrysler Greenway, near Kingsville

- Placed on off-road multi-use unpaved well maintained trail, popular with cyclists. Nearby attractions include: wineries, Lake Erie, Pelee Island, Kingsville, Leamington, Point Pelee National Park.
  - Total number of cyclists during 6 week count period: 5,154
  - Average count per week: 859
    (Busiest day – Sunday)
  - Daily count range: 57 to 190
  - Weekday average: 115
  - Weekend average: 141



Based on 6 week period (20/06/2016 - 31/07/2016)
Count=number of cyclists riding in either direction
No sizeable difference in counts by direction

Cyclists on the Chrysler Greenway

Interviewed 9 cycling parties, 13 cyclists total, on Sunday August 28, to capture a sense of the cycling market:

- 11 of 13 cyclists were local cyclists, and on trail for day trip
- Party size ranged from 1 to 3 cyclists
- 2 cyclists visiting from >100km were staying multiple nights
- Trail attracted limited visitors during this time period. The one party of 2 visiting cyclists were from out of province, Alberta

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

Share your perspective on the impact cycle tourism is having on your business.

Explore Ontario By Bike!

Hello,

Thank you to those who have already completed this short survey.

This is a final reminder for Windsor / Essex County businesses to complete the survey below, which should take no more than 3 minutes of your time.

Ontario By Bike / Transportation Options are conducting a regional cycle tourism study to help better understand this growing market in Windsor / Essex County.

Be part of the study and share your perspective on the growth and impact of cycling and cycle tourism on your business.

Deadline for Survey Completion - October 20th, 2016.

Complete Survey

All information collected will be aggregated. Individual comments will be kept confidential unless permission has been received.

Deadline for Survey Completion - October 20th, 2016

Thank you for participating in this valuable research initiative.

If you have any questions regarding this research study, please contact us at 1-866-701-2774 or at info@ontariobybike.ca.

Best regards,

Louisa Mursell and Michael McCreesh

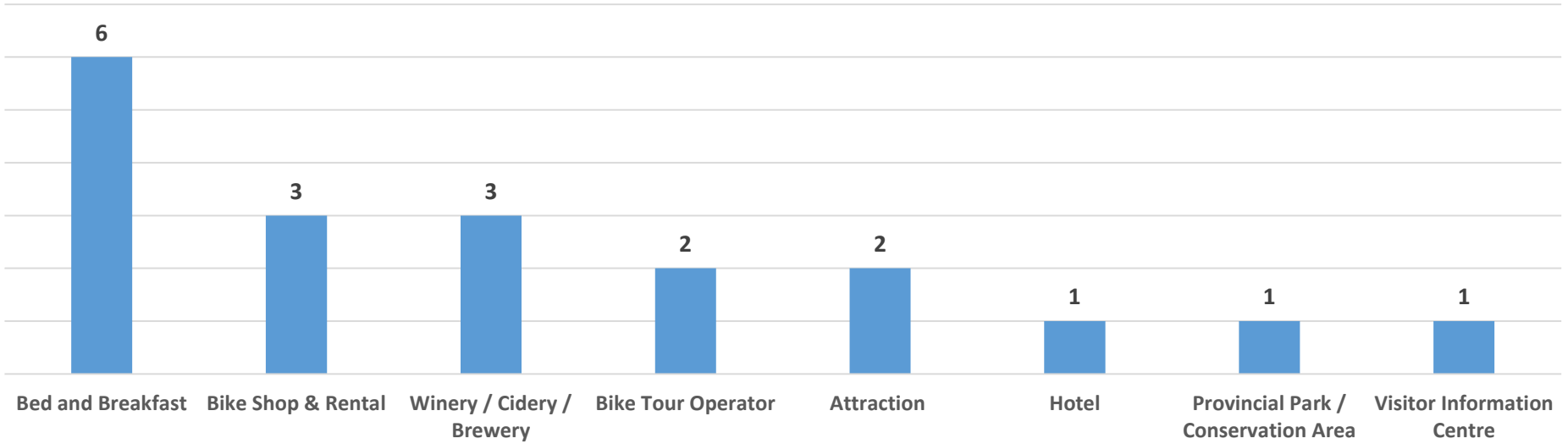
Ontario By Bike
www.ontariobybike.ca
C/O Transportation Options
550 Coxwell Ave ~ Toronto, ON ~ M4C 5R1
416-827-2774 / 1-866-701-2774
www.transportationoptions.org

Type of Regional Businesses

- Invited 29 businesses and locations to participate in online survey, all registered Ontario By Bike locations in Windsor / Essex County
- 19 businesses responded (65% response rate)
- Good representation from across tourism industry. Strong response from accommodation providers, particularly B&Bs Windsor / Essex County

Credit: WindsorEats.com

Type of Business (N = 19)



Cycle Business Activity 2016

Business Type	# of cyclists*
Attractions	10-100
Bed & Breakfasts	12-100
Bike Shops	1,000-5,200
Bike Tour Operators	600-3,000
Hotel	100
National or Provincial Park / Conservation Area	3,000
Visitor Information Centre	2,000-3,000
Winery / Cidery / Brewery	50-400

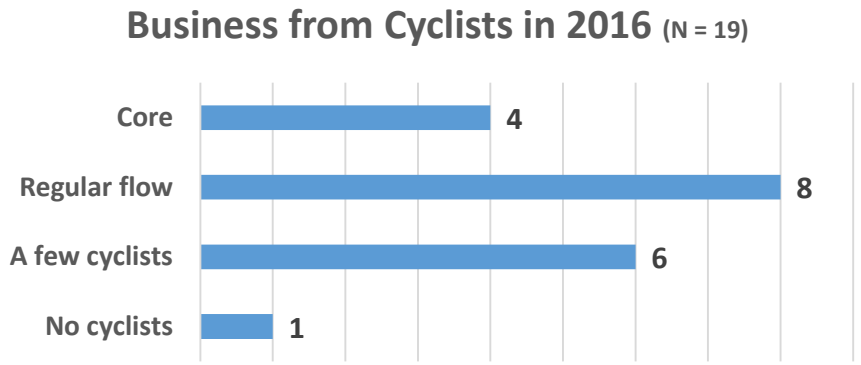
* Estimated cyclists in 2016

63% of businesses indicated cyclists were either a 'core' or 'regular' part of their business

- 4 businesses indicated cyclists as a 'core' part of their business
  - 3 bike shops and a bike tour operator
  - One bike shop served an estimated 5,200 cyclists
- 8 businesses indicated a 'regular flow of cyclists' and could count on some cyclists each week
  - One winery served an estimated 400 cyclists
  - National Park estimated 3,000 cyclists visited the park in 2016

For 7 responding Windsor / Essex County accommodators, a total of 581 cyclist nights can be estimated (# of cyclists X # of nights)

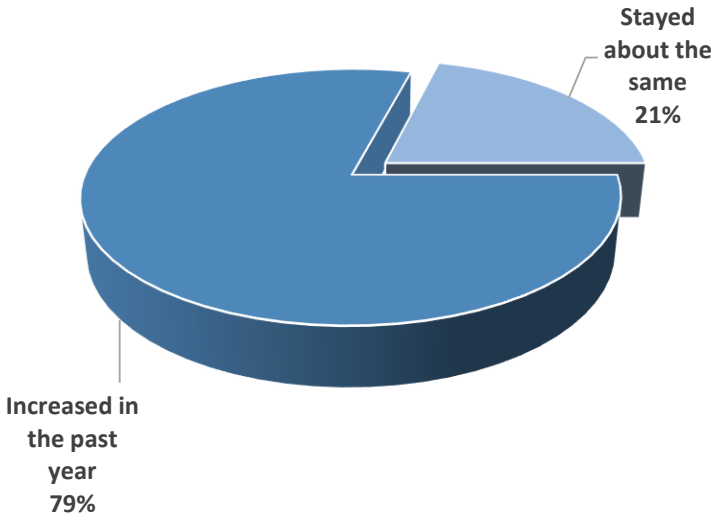
- Only one of the 7 accommodators indicated they had no business from cyclists in 2016



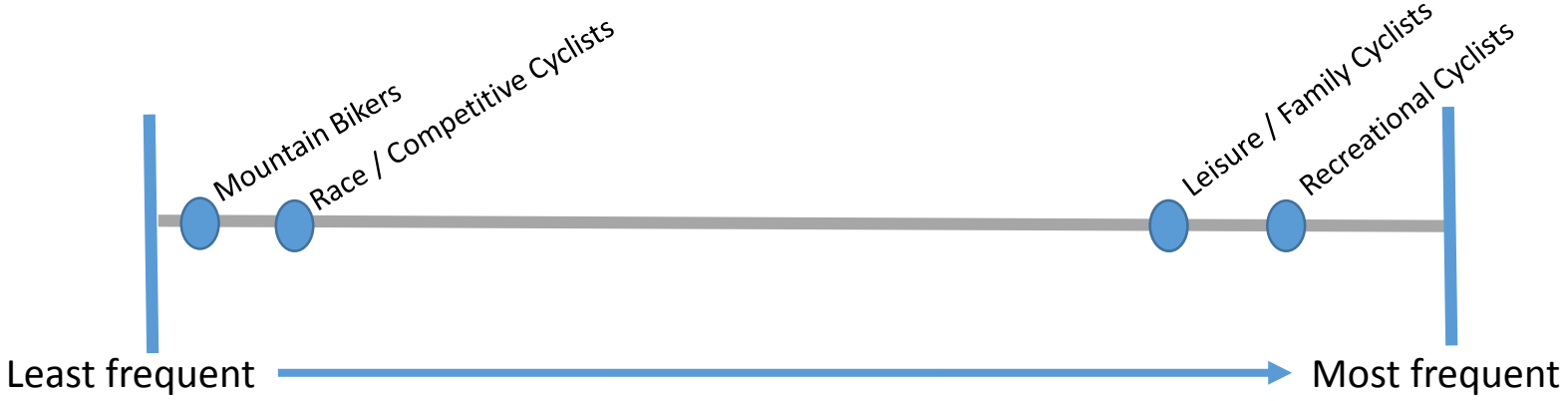
Cycle Business Trends and Type of Cycling Customers

- 79% felt cycling business increased in past year, while 21% indicated business from cyclists stayed about the same
  - No businesses indicated a decrease in cycling business in past year
  - 5 B&B's and a hotel felt cycling business had increased in past year
  - Both (2) bike tour operators and 2 bike shops felt cycling business had increased in past year
- 10 businesses indicated 'recreational' cyclists were their 'most frequent' cycling customers
- 9 businesses indicated 'leisure / family' cyclists were their 'most frequent' cycling customers
- 'Race / competitive' cyclists and 'mountain bikers' were the 'least frequent' cycling customers

Cyclist Business 2015-16 (N = 19)



Type of Cycling Customer (N = 19)

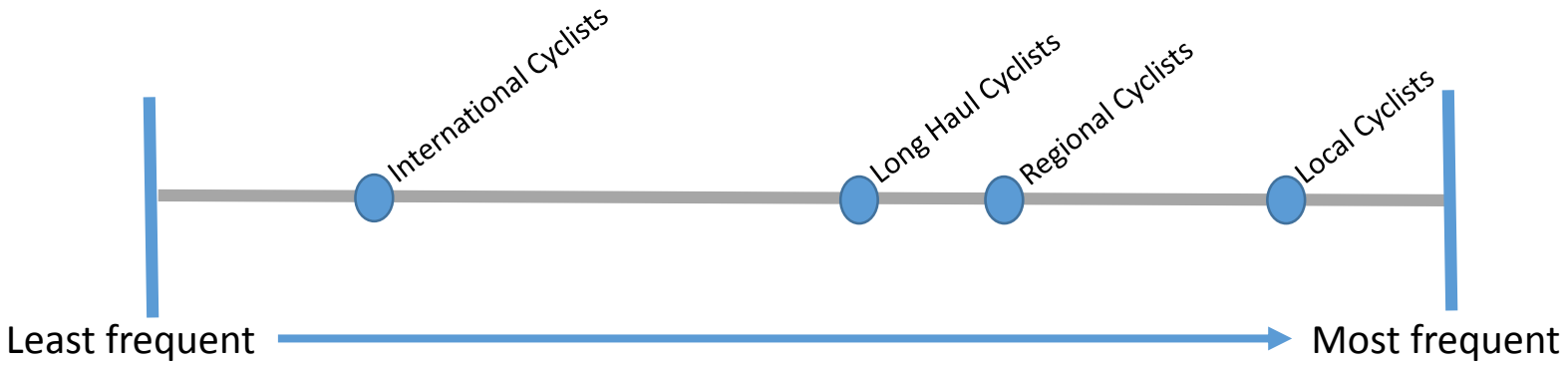


Origin of Cycling Customers

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

- 12 businesses indicated 'local' cyclists (<40 km) were their 'most frequent' cycling customers
- 5 businesses indicated 'long haul' cyclists (>100 km) were their 'most frequent' cycling customers
- 2 businesses indicated 'regional' cyclists (40-100 km) were their 'most frequent' cycling customers
  - An additional 11 indicated 'regional' cyclists (40-100 km) as 'frequent' cycling customers
- 11 businesses indicated they served 'international' cyclists in 2016

Frequency of Cyclists from Residence (N = 19)



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

Windsor / Essex County – Cycling Events Overview

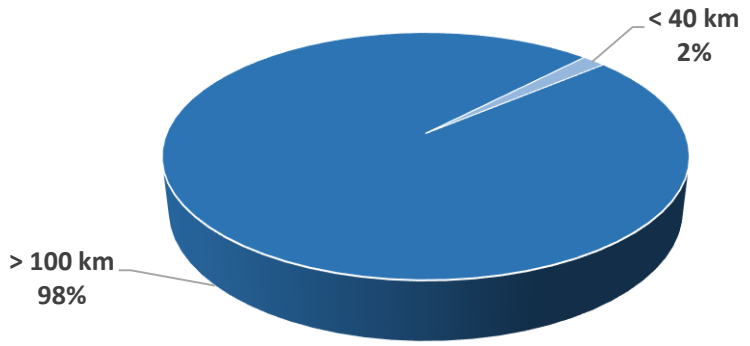
- **Name**: Great Waterfront Trail Adventure
- **Location**: Pelee Island to Grand Bend
- **Date**: August 7th – 12th, 2016
- **Type**: 5-day tour (Recreational / Experienced)
- **Distance/Events**: Up to 352 km or 390 km
- **Registered Riders**: 130
- **Survey Response Rate**: 75 (50%)
- **URL**: www.waterfronttrail.org/events/great-waterfront-trail-adventure

- **Name**: Canada South Coast Bike Tour
- **Location**: Various (Essex County)
- **Date**: September 24th, 2016
- **Type**: Charity (Beginner / Recreational / Experienced)
- **Distance/Events**: 5 km, 32 km, or 70 km (trail) / 58 or 110 km (road)
- **Registered Riders**: 179
- **Survey Response Rate**: 32 (18%)
- **URL**: www.ourgreenlegacy.org/events/canada-south-coast-bike-tour/

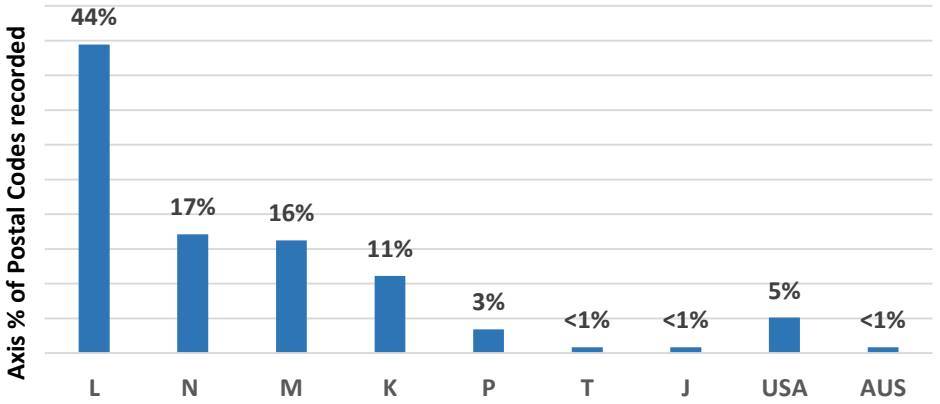
Great Waterfront Trail Adventure – Event Analysis (Registered Riders: 130)

- 98% considered tourists, travelling > 100 km
- 83% came to southwestern Ontario from elsewhere in Ontario. 60% came from Toronto and central Ontario*
- Majority of participants came from Ontario, drawing a few international visitors
- 95% were aged 45+, with an average age of 58 (N = 95*)
- Male (51%) : Female (49%) split*
- 60% rode with friends or family (N = 75)

Distance from Permanent Residence* (N = 117)



Postal Codes* (N = 117)

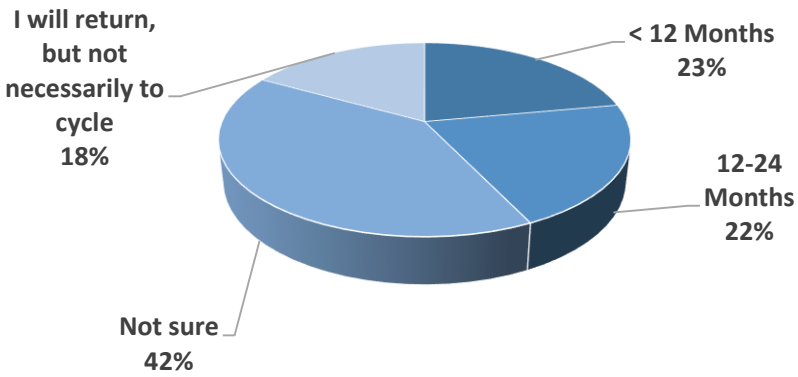


*GWTA Registration Data

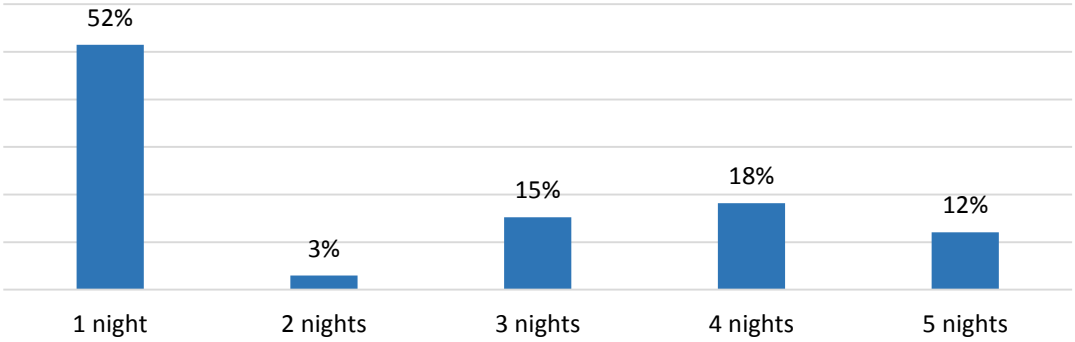
Great Waterfront Trail Adventure – Event Analysis (Registered Riders: 130)

- 63% intend to return to the area in the 2 years, of which 45% intend to return specifically to cycle
- 77% intend to visit other regions of the Great Lakes Waterfront Trail in the next 2 years
- 78 additional overnights in paid accommodation were calculated, pre, during and post-event (N = 33)
- Participants averaged 3.5 cycling trips in Ontario (N = 72) and 1.3 cycling trips outside Ontario in 2016 (N = 73)
- 55% had taken an overnight cycling trip in Ontario in past two years (N = 73)
- 99% would recommend GWTA to friends or family (N = 74)

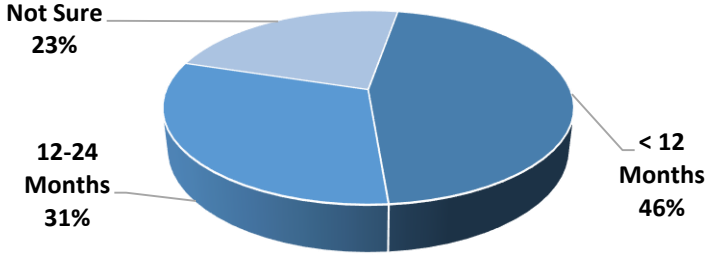
Likelihood to Return to the area of the 2016 GWTA
(N = 74)



Pre-, During & Post-Event Overnights at Paid Accommodations (N = 33)



Most likely to return to another region of the Great Lakes Waterfront Trail to cycle and/or visit in: (N = 74)



Great Waterfront Trail Adventure – Event Analysis (Registered Riders: 130)

- Top three activities as indicated by participants:
  - Visiting local café / restaurant
  - Visiting local winery, craft brewery
  - Visiting local attractions

Credit: Simon Wilson / Waterfront Regeneration Trust (2016)

Participant Activities (N = 74)

Visitor Spend and Impact

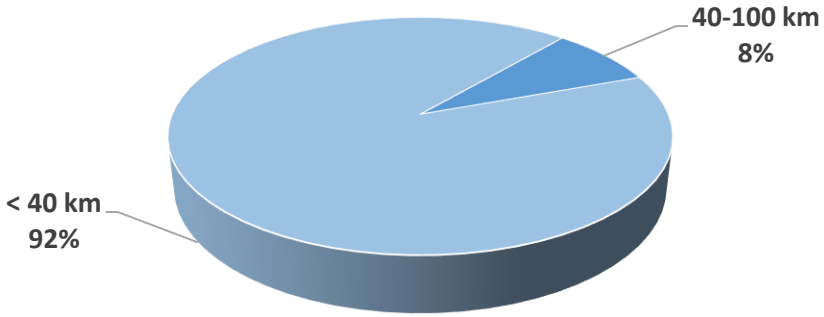
- $129,732 total visitor spending and impact of event
- $998 average total amount spent per rider,
- $166 average daily amount per rider, completing event over 6 days

Based on data collected from registered riders in post ride survey; and event coordinators, Waterfront Regeneration Trust. Average based on spending for 6 categories used by Ontario Ministry of Tourism, Culture and Sport – Tourism & Recreation Economic Impacts Model (TREIM): Transportation; Food & beverage (restaurants); Food & beverage (stores); Accommodation; Retail shopping; Recreation & entertainment

Canada South Coast Bike Tour – Event Analysis (Registered Riders: 179)

- 8% considered tourists (> 40 km)
- No participants travelled > 100 km
- 1 participant came from the US*
- Participants enjoyed the event, rating the experience an average of 8.5 out of 10 (N = 30)
- 47% consider themselves 'Experienced' cyclists, 38% consider themselves 'Recreational' cyclists (N = 30)

Distance from Permanent Residence* (N = 160)

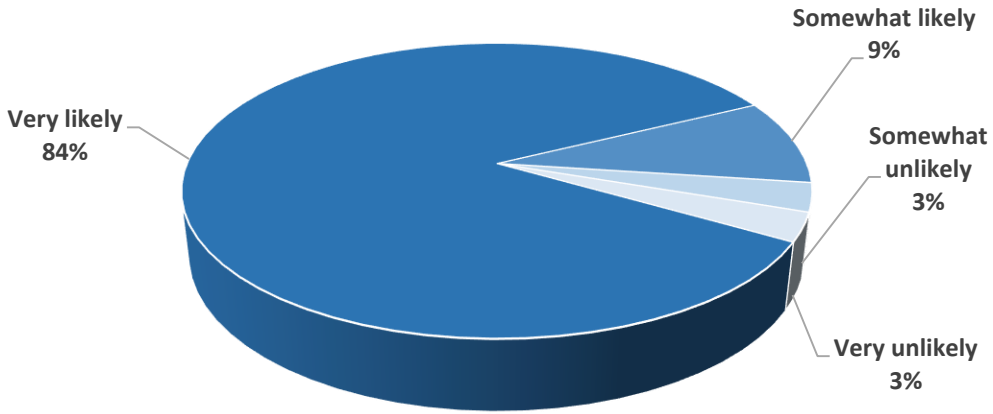


***Registration Data**

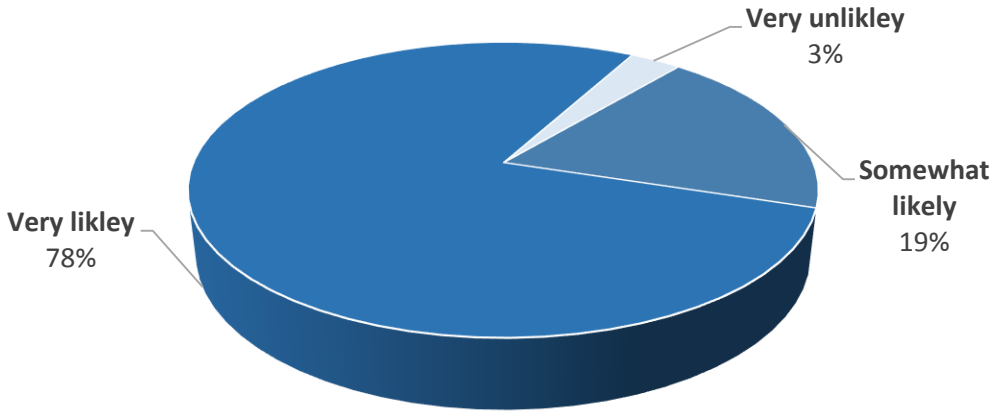
Canada South Coast Bike Tour – Event Analysis (Registered Riders: 179)

- 93% 'Very likely' or `Somewhat likely` to return to Canada South Coast Bike Tour in 2017
- 97% 'Very likely' or 'Somewhat likely' to recommend the event to family and/or friends
- All participants came only for the day (N = 32)
- Participants averaged 3.2 cycling events in Ontario in 2016 (N = 32)

Likelihood to Return (N = 32)



Likelihood to Recommend (N = 32)



Canada South Coast Bike Tour – Event Analysis (Registered Riders: 179)

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

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

South West Ontario Tourism Corporation (RTO1) www.ontariossouthwest.com

- 26,327 total pageviews to all (28+) webpages with cycling content (Jan – Nov 2016)

Tourism Windsor Essex Pelee Island www.visitwindsoressex.com

- 4,994 total visits to all webpages with cycling content (Jan – Nov 2016)

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

- 2,177 total visits (Jan – Nov 2016)
- Time on Page - 3:11 minutes
- 31,925 total visits to Windsor Essex Pelee Island business listings (since June 2013)
- 29 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

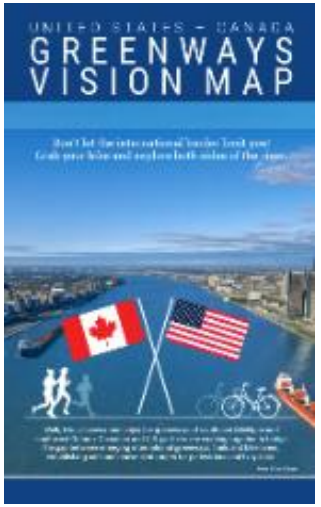
Print Editions

City of Windsor - Parks, Trails & Recreation Map

- 19,100 approximately distributed (Jan – Nov 2016)

Partnership Collaboration - Canada-US Greenways Vision Map

- Approximately 9,500 distributed (Jan – Nov 2016)



Other Marketing Channels & Promotions

Blogs

South West Ontario Tourism Corporation (RTO1)

- 18,641 total pageviews to blog pages specific to Windsor Essex County Pelee Island (Jan – Nov 2016)

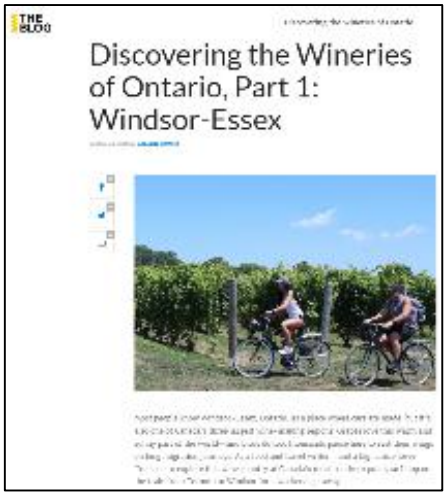
Tourism Windsor Essex Pelee Island

- 633 total visits to blog featuring cycling in the region and VIA Rail (Jan – Nov 2016)

Email Marketing

South West Ontario Tourism Corporation (RTO1)

- 255,848 total sent (6 broadcasts) with content featuring cycling and also other activities
- 1,688 total clicks on cycling related content (9% of total)



Paid Media & Advertising

South West Ontario Tourism Corporation (RTO1)

- 4 campaigns (Facebook ads and native advertising) featuring cycling content, specific to Windsor Essex Pelee Island:
  - 1,721,193 impressions, 15,455 link clicks

Cycling in Ontario / Le velo en Ontario Guide - Ontario By Bike - www.ontariobybike.ca/2016

Both TWEPI and Ontario's Southwest (RTO 1) featured in bilingual Cycling in Ontario Guide 2016

- 37,000 print copies (25,000 EN & 12,000 FR)
- 11,000 digital reads
- Featured in social media, email marketing and website (blogs)

Special Promotions

Gear Up & Go Cycling Program www.gearupandgo.ca

A cycling passport to promote trails in Windsor and Essex County. Partnership between City of Windsor, Tourism Windsor Essex County Pelee Island, County of Essex and the Windsor Essex County Health Unit

Program Results

- 594 total program registrations (140 participating)
- Total collateral distributed: 500 passports, 500 rack cards, 300 water bottles, 250 pins
- 271 total web visits

Email Marketing

- 7,774 total sent with 31% open-rate, 20% click-thru rate

Social Media Marketing

- 129,457 total social media impressions on Facebook and Twitter (including paid campaigns)

Paid Advertising

- 87,026 total Facebook impressions (3 campaigns)
- 69,176 total advertising impressions (on Windsorite.ca)

Also promoted at/on

- Events & festivals – 8 promotional appearances at local events
- Industry workshops and summits
- Radio – 8 Week campaign between June and August

Report Section:

Other Cycle Tourism Indicators

Other Cycle Tourism Indicators

Bicycles on Pelee Island Ferries

Ontario Ferries (also known as Owen Sound Transportation Company) operates two boats that transport passengers and vehicles, including bicycles, in between Kingsville and Leamington on the mainland, and Pelee Island.

- Pelee Island is a popular cycling destination. Other ferry services connect island to Ohio/USA
- Leamington and Kingsville towns and surrounding areas in Essex County have many attractions for cyclists

Ontario Ferries collects data annually on the number of bicycles transported.*

- 8,250 total bicycles transported during 2016 operating season April to September
- 31% increase since 2014

Peak bicycle travel months were July and August. Total numbers transported during peak months vary dependent on ferry:

- 352 to 439 (Pelee Islander, smaller ferry)
- 2,154 and 2,302 (Jiimaan, larger ferry)

**Data provided by Ministry of Transportation, Province of Ontario*

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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
- Intercepts 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

Ontario By Bike®

Transportation Options

Louisa Mursell
Executive Director
Michael McCreesh
Project Manager

- Windsor / Essex County -
Cycle Tourism Regional Research Report

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rmcg

Robert Wong
Principal
www.rmcg.ca

www.TransportationOptions.org

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