

2017

CYCLING



NORTHERN ONTARIO CYCLING TOURISM PLAN



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Priorities for Tourism in Northern Ontario

With a vision of building a unique and distinctive tourism destination wherein high quality products and experiences resonate with consumers, entrepreneurship is valued, and tourism provides local, regional and global connections for the entire region, Tourism Northern Ontario (TNO) has established a mission designed to grow tourism in the north.



Mission

Tourism Northern Ontario will take a leadership role to strategically guide and champion growth in Northern Ontario's tourism industry, through strong communication, collaboration and partnerships with industry.



Governed by its funding agreement with the Ministry of Tourism, Culture and Sport (MTCS), Tourism Northern Ontario is contracted to enhance services in the following six pillars of tourism.

- 01 Governance & Administration
- 02 Product Development
- 03 Marketing
- 04 Workforce & Industry Training
- 05 Investment Attraction
- 06 Partnership

TNO Strategic Plan 2017-2020

TNO's activities under each of the six pillars of tourism are steered by strategic objectives, which are outlined in detail in the *Tourism Northern Ontario 2017-2020 Strategic Plan*. Objectives related to each of the pillars are as follows:

01 Governance & Administration

- Enhance organizational excellence related to board policies, procedures and provincial conflict of interest policies
- Ensure roles and responsibilities are effectively allocated, adhered to and reviewed
- Ensure service contracts with outside organizations reflect TNO mandate
- Establish quantifiable performance metrics with clear targets across all pillars to ensure TNO strategic efforts are translated into improved regional performance
- Continue to expand awareness of TNO and its activities within existing and new stakeholders groups
- Improve capacity for communication and outreach across Northern ON and develop advocacy position on key issues

02 Product Development (including research)

- Implement an experience shift, focusing on best bet products and experiences
- Implement TNO wayfinding strategy and initiate visitor information centre training
- Implement a quality shift, building consistent quality offerings and customer service
- Continue efforts to translate product development and target market research into action and track results
- Develop and implement a strategic research plan to track tourism business performance

03

Marketing

- Align and coordinate programs/ tactics common to all sub-regions and encourage collaborative marketing of products and experiences intra-regionally
- Refresh and implement new 5 year marketing strategy with Ontario Tourism Marketing Partnership Corporation's (OTMPC) northern office
- Ensure customers are easily connecting with Northern Ontario operators through appropriate marketing vehicles

04

Workforce & Industry Training

- Work in collaboration with regional partners to leverage funding resources and implement workforce training plans
- Build TNO's resource role to educate stakeholders on training opportunities across the region

05

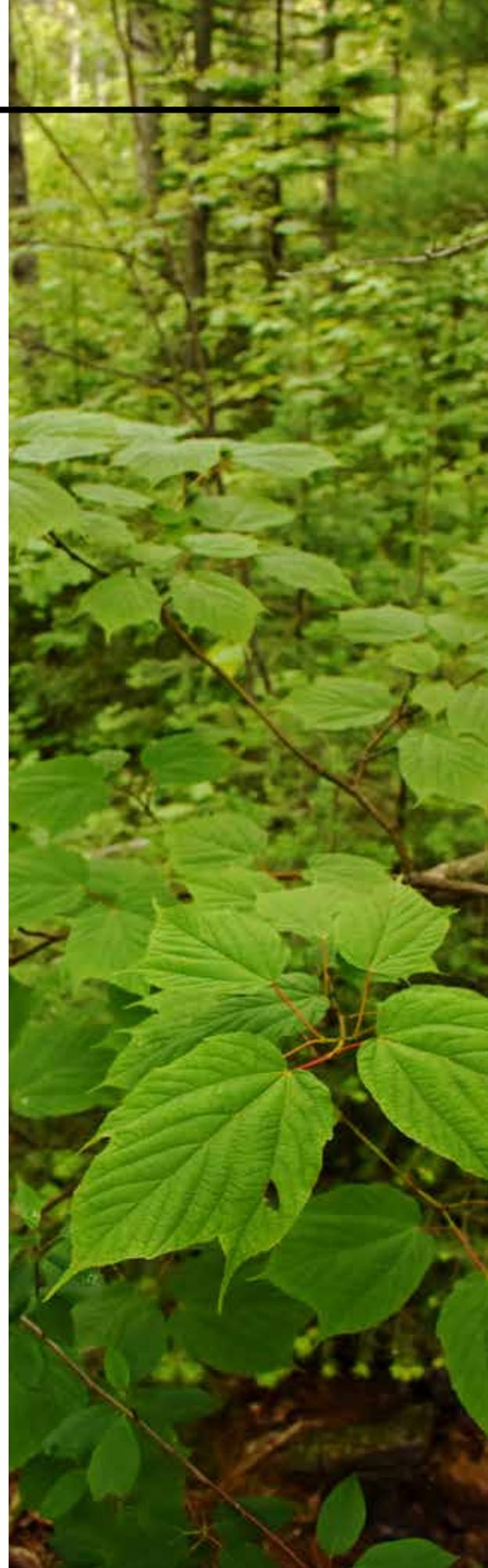
Investment Attraction

- Build the bridge to connect Northern Ontario's investment community partners and funding agencies and encourage investment attraction across the region

06

Partnership

- Continue to build long term relationships with industry partners, focus on projects that show progress beyond marketing, and increase available partnership funding for TNO



Marketing Strategy 2017-2020

Key issues outlined in the *Strategic Direction for Marketing Tourism in Northern Ontario 2017-2020* prepared in conjunction with OTMPC, as they relate to product development for Northern Ontario include:

- The need to position Northern Ontario's unique experiences as the key element of the offer;
- The need for alignment, collaboration and effective planning and partnerships between RTOs, DMOs and OTMPC as well as northern tourism stakeholders to create marketing strategies, programs and partnerships that increase visitation and spending;
- The need to continually improve and adapt existing Northern Ontario tourism products, targeting avid and niche travellers with a consumer's first philosophy;
- Prioritizing Northern Ontario's geographic markets, specifically focusing on travel corridors of the Great Lakes/near border US states and domestic Ontario;
- Continue to invest in research and monitoring of consumer and market conditions;
- Invest in travel trade and group tours that connect with Signature Experiences;
- Leveraging meetings and conventions as connected back to business tourism, in relationship with Gateways and Urban communities; and
- Utilize Northern Ontario's competitive advantage of accessible, pristine outdoors and wilderness.

Marketing efforts will focus around:

- Improved distribution and engagement of traditional media approaches, including avid oriented consumer shows, media marketplaces and media relations which will generate and leverage stories for digital outlets, focusing on earned media stories;
- Investment in digital distribution and engagement, working to align content from traditional media paths utilizing metrics, influencers on targeted tactics focused on specific consumer segments;
- Emphasizing perceived distance to market (visitor's travel distance to get to Northern Ontario) as an opportunity to explore and have a variety of experiences along the way; and
- Enhanced measurement and ROI tracking measures in place.

Building upon the *2012-2017 Strategic Direction for Marketing*, the 2017-2018 Tourism Northern Ontario marketing focus will establish TNO's role as a leader in marketing of Northern Ontario aligning with the sub-regions, region and OTMPC. TNO's implementation plan prepared in response to the Strategy outlines three areas of focus:

- 1 Strategic planning, implementation, performance and reporting.
- 2 Supporting destination brands at the provincial, regional and sub-regional levels.
- 3 Marketing priority products & experiences:
 - » **Angling & Hunting**
 - » **Cultural & Heritage**
 - » **Gateways & Urban Communities**
 - » **Nature & Adventure**
 - » **Touring**

Utilizing the key foundational elements outlined in the Marketing Strategy, the TNO 2017-18 Marketing and Action Plan calls for:

- Implementation of a pan-Northern initiatives under the "consumer first" philosophy of seamless borders for the visitors, while supporting destination brands and marketing;
- Working closely with OTMPC early in the planning cycle for the six priority products and experience areas;
- Working within Provincial branding activities to provide pan-Northern "lure" pieces to drive consumer planning; and
- Engaging customized tactical service agreements under multi-year contract to ensure consistent implementation of TNO's marketing plan.



TNO Product Development Plan & Research

Tourism Northern Ontario has taken a priority approach to research in the last five years and has focused its efforts by defining strategic priorities based on this research. This strategic approach has led TNO to focus on creating quality visitor experiences through both quality and culture shifts in the Northern Ontario tourism industry. This focus has led to a reallocation of resources, placing more effort on product development and moving resources from the more traditional marketing practices with the forethought of creating a stronger more powerful tourism region in the long run.



¹ Research Resolutions & Consulting, Overview of Tourism Opportunities for Northern Ontario (RTO13), July 2014.

Research summaries completed for TNO by Research Resolutions & Consulting provide a situation analysis with an in depth look at the market and its size in Northern Ontario.

The reports focus on the following areas:

- North American Motorcycle Tourists (2014)
- North American Hunters (2014)
- Attraction Tourists (2014)
- Festivals & Event Tourists (2014)
- Snowmobile Tourists (2014)
- High Yield Nature/Outdoors Tourists (2013)
- High Yield Anglers (2013)

When the above research reports are compared in the summary report *Overview of Tourism Opportunities for Northern Ontario*, the following findings are drawn¹:

- The outdoors is a salient if not core element in the lure of Northern Ontario for tourists in each segment.
- Many Canadian tourists are near locals who billet with friends and relatives, stay in their private cottages or in campgrounds in Northern Ontario. Conversely, American tourists in each segment tend to rely on paid roofed lodging during their stay.
- Almost by definition, niche markets tend to be relatively small. For example, the markets for motorcycle touring and hunting are more limited than the markets for festivals and events or attractions.
- Some activities offered in Northern Ontario are more apt to be the reason for taking a trip whereas others tend to be one-of-many activities a tourist engages in during a trip driven by other purposes. Fishing, hunting and motorcycle touring are segments with strong motivational elements whereas festivals and events or attractions more commonly provide tourists with things to see and do on a trip taken to see friends and relatives or for general pleasure purposes.
- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.



1.3 » TNO Product Development Plan & Research

The *Northern Ontario Product Development Strategy*, also completed in 2014 examined not only current tourism products that were available, but also experiences that were under development and future product opportunities. It matched these experiences with priority markets to determine where Northern Ontario should focus its product development efforts in the coming years as follows:

PRIMARY FOCUS	SECONDARY FOCUS	TERTIARY FOCUS
Fishing	Motorcycle Touring	Boating/Great Lakes Cruising
Nature & Adventure	Hunting	ATV
Auto/RV Touring		Snowmobile
Gateways & Urban Communities		Aboriginal

Recommendations in the report not only focused on the tourism experiences in Northern Ontario, but encouraged an administrative shift to focus more resources on product development and increasing the quality of available experiences.

As a result of recommendations in the *Product Development Strategy*, six Northern Ontario Product Development Committees were formed in 2015. These teams aid and advise Tourism Northern Ontario on the enhancement and development of their product area in Northern Ontario.



Cycling Tourism – the Current Context & Research Findings

Case Studies
from Ontario
& Across Canada



1

Manitoulin Island

One does not have to look very far for a cycling tourism success story. Manitoulin Island has been attracting riders seeking its quiet, scenic rural roads threaded together by small town charm for decades. The cycling product on the island has been receiving attention by the Manitoulin Island Cycling Advocates, incorporated recently in 2015. There are 14 mapped routes throughout the island, rated for difficulty and connected to local amenities. Five-day guided tours are available for purchase from OK Cycle and Adventure Tours. The Passage Ride is an innovative multi-day event that includes the MS. ChiCheemaun ferry from Tobermory and several routes based on difficulty. The event completely sold out in 2016.

2

Quebec's Award-Winning Cycling Route ²

Quebec's Route Verte, recognized by National Geographic as the world's premier cycling route, is a 5,300 km network of paved shoulders, off-road trails, designated shared roadways on quiet roads, bike lanes and barrier-separated cycle tracks stretching from the Gaspé Peninsula to the Ontario border and from the U.S. border to the Abitibi. Development of the network began in 1995 with a 10-year commitment of \$88.5 million of funding and technical support from the Quebec Ministry of Transportation. Officially opened in 2007, the network is undergoing an expansion phase that will add 900 km. La Route Verte is now 95% completed with 5,000 km. Coordination of planning, inter-regional cooperation, communications and promotion is handled by the non-profit organization Vélo Québec.

² www.routeverte.com/e/historique_e

3 Economic Impact of Cycle Tourists in Niagara

Cycling tourism in Niagara has been developing over many years, capitalizing on the region’s existing tourism infrastructure, complemented by the area’s key tourism offers such as wineries and waterfront access.

Economic impact research completed by Transportation Options in 2010 indicates³:

- **\$148** is the average amount spent by cyclists staying one or more nights on combined food and beverages, attractions and retail purchases (excludes accommodations). The expenditures are broken down as follows: retail purchases **27%**; attractions **12%**; food and beverage **61%**.
- **52%** of all cyclists stayed one or more nights: **69%** one night; **19%** two nights; and **12%** three or more nights.
- Accommodations choices included **43%** staying in a range of hotels or motels, **29%** staying at bed and breakfasts.
- **85%** of cyclists surveyed came from Ontario.

2012 details from Statistics Canada add more information about the number of tourists visiting and show an increase in spending⁴:

- Approximately **98,000** cyclists visited Niagara with **97.8%** staying overnight.
- Spending increased to **\$229** per visit and visitation based on cycling activities was up by **16.7%**.

Average amount spent by cyclists staying one or more nights in Niagara:

\$148

- 1 Manitoulin Island
- 2 Great Lakes Waterfront Trail
- 3 Niagara
- 4 Quebec



³ From survey and report. *Economic Impact of Cycle Tourism: Niagara Region and Greenbelt Areas*. Summer 2010. completed by Transportation Options

⁴ Travel Survey of Residents of Canada, International Travel Survey, Statistics Canada & MTCS – cited from Tourism Partners of Niagara “Niagara Cycling Tourism Report”, 2016.



The Great Lakes Waterfront Trail Multipurpose Cycling Routes ⁵

Most bike routes are used for a range of purposes and the Waterfront Trail is no exception. This trail stretches 730 km along the shore of Lake Ontario from Niagara-on-the-Lake to the Quebec border and connects 41 communities. While most cyclists along the route use it for recreational purposes, research by the Waterfront Regeneration Trust shows that **24%** of all trail users regularly use the trail to commute.

As a sign of the growing popularity of cycling in Ontario, the Waterfront Trail expanded westwards along Lake Erie in 2013, adding a second Great Lake, another 620 km and 27 new waterfront communities along a signed, mostly on-road route. Today the Waterfront Trail is close to 1,400 km in length.

The Waterfront Regeneration Trust is also working in partnership with the Greenbelt Foundation to create a cycling route to connect and showcase Greenbelt communities. The business community and tourism partners will be part of the project through Transportation Options' Welcome Cyclists program.

⁵ <http://www.waterfronttrail.org/>

⁶ Waterfront Regeneration Trust



Economic Impact of Waterfront Regeneration Trust's Great Waterfront Trail Adventure 2015 ⁶

The Great Waterfront Trail Adventure Tour is an annual cycling event that takes place along Ontario's Great Lakes Waterfront Trail. Results of the 2015 event are as follows:

- Overall **\$176,000** in economic benefits
- **87%** participation from Canada, **13%** U.S.
- **57%** have an average household income of **\$100,000-\$200,000**
- **40%** participated in two or more cycling events in Ontario while **27%** participated in two or more cycling events outside Ontario in 2015
- **51%** took two or more pleasure trips in Ontario and **39%** took trips outside of Ontario in the past two years where cycling was a significant part of the trip
- **64%** will return to the region/route
- **54%** spent at least one night in a hotel, **18%** spent two nights in a hotel and **28%** spent four or more nights in a hotel
- **19%** visited museums/heritage attractions
- **57%** visited wineries/breweries



Current Provincial Cycling Focus

Recent developments in tourism at the provincial level indicate that Ontario currently has an interest in supporting cycling tourism product development and marketing.

In 2013, the Ontario Ministry of Transportation (MTO) released “CycleON”, Ontario’s 20-year cycling strategy. Among its strategic directions was the goal to increase cycling tourism opportunities.

It stated that, to encourage the growth of cycling tourism, the Province would:

- Promote Ontario as a premier cycling tourism destination
- Identify a province-wide cycling network and use it to prioritize future infrastructure investments on provincial highways
- Improve cycling tourism experiences in Ontario and inter-modal cycling connections by working with partners to provide end-of-trip facilities; maps of existing cycling routes and wayfinding applications.

Each of these areas of action were to be supported by specific projects, programs and initiatives identified in future action plans.



The first CycleON Action Plan identified the following actions to achieve this goal, along with identifying lead Ministries:

- Identifying a province-wide network of cycling routes to promote recreational cycling and cycling tourism, connect municipal cycling routes and places of interest and help prioritize future infrastructure investments on provincial highways (2016) — MTO
- Investing more than \$3.5 million in trails that can be used for cycling, walking and other activities as part of Ontario’s celebration and legacy of the 2015 Pan/Parapan American Games (2016) — Ministry of Tourism, Culture and Sports (MTCS)
- Planning for cycling routes, bicycle access and parking measures at venues at the Parapan American Games — MTO
- Supporting cycling through the 2005 “Ontario Trails Strategy”, a long-term plan that provides direction for planning, managing, promoting and using trails in Ontario — MTCS
- Supporting cycling tourism projects through the Celebrate Ontario program, which supports festivals and events, and the Tourism Development Fund — MTCS
- Providing product development and marketing support of cycling tourism through regional tourism organizations (RTOs) — MTCS

Provincial focus on cycling tourism has created a competitive environment in Ontario in relation to cycling tourism. Many regions are focusing efforts on developing and marketing cycle tourism, driven by the funding and support that is available.

Northern Ontario's Current Cycling Situation

Cycling experiences in Northern Ontario range in focus and include:



COMMUNITY CYCLING ROUTES
designed to increase the activity of local residents;



FAT TIRE BIKING
primarily off-road riding on snow in the winter, this activity has grown in popularity in recent years; and



REGIONAL CYCLING ROUTES
longer distance routes that lead cycling tourists from community to community;



SPECIALTY CYCLING
including cycling activities like pump tracks and jump parks, which typically attract local riders, primarily with BMX bikes.



MOUNTAIN BIKING TRAILS
primarily off-road trails ridden by locals or tourists who may travel to the area to spend a day or two riding a trail system;



Cycling product development, research undertaken to support such developments and the market-readiness of existing cycling assets varies throughout Northern Ontario. A preliminary list of examples of cycling assets was compiled from the Northern Ontario Cycling Product Development Committee meeting in 2015 ([Appendix I](#)), but market for the product and its market-readiness have not been considered. Further, the Cycling Product Development Committee members provided their thoughts on a SWOTT analysis for cycling in Northern Ontario during a 2015 meeting ([Appendix II](#)). For more information on the Cycling Product Team, its role and purpose, please see [Appendix III](#).

In recent years, Tourism Northern Ontario partnered with Tourism Sault Ste. Marie on the development of the Lake Huron North Channel Cycling Route before turning stewardship of the route over to the Waterfront Regeneration Trust (WRT). TNO continues to partner with WRT as they prepare for the launch of the route in June 2017.

Further, TNO supported community stakeholders in the development of the St. Joseph Island Cycling Plan. The resulting 80 kilometre main route is an opportunity to develop a side route off the Lake Huron North Channel Waterfront Trail on St. Joseph's Island. The plan documents the primary and secondary route, supporting attractions and amenities as well as staging areas. It also discusses the next steps needed to fully develop the experience.

TNO also formed a strategic partnership with the Discover Routes Trails Organization to develop a wayfinding program for the Voyageur Cycling Route, a 380 kilometre trail that spans Northeastern Ontario and will soon be expanded west to connect with the Great Lakes Waterfront Trail in Sudbury and west through Lanark and Renfrew counties to reach Ottawa. TNO is also working on a wayfinding program with the Manitoulin Cycling Association, another strategic partner.

The *Northern Ontario Product Development Strategy* outlines the foundations for product development activities, including the following key factors:

- start with best bets;
- position for sustainability by anticipating where the market is going;
- leverage best-in-class operators/assets to inspire and motivate others; and
- focus time, resources and effort on opportunities with enough critical mass and appeal, which match the markets and type of traveler that Northern Ontario wants to attract.

Included in the product development strategy as part of the larger key product category “Nature & Adventure”, recommendations that could relate to cycling include:

- investigating opportunities surrounding signature landscapes and waterways that differentiate Northern Ontario from other provinces and states, developing a collection of “bucket list” offers and linking offers with local culture and heritage;
- establishing working relationships with appropriate levels within the Ministry of Natural Resources and Forestry, Ontario Parks and Parks Canada; and
- advocating for support for rural capital investments in items that are ancillary to tourism (i.e. signage, cell coverage etc.) but are in demand by today’s markets.

The full list of strategy foundations and recommendations can be reviewed here:

» [tourismnorthernontario.com/
wp-content/uploads/2016/08/2014_
northern_ontario_product_
development_strategy.pdf](https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014_northern_ontario_product_development_strategy.pdf)



The Case for Cycling Tourism in Northern Ontario

Several factors make cycling an interesting product for further development in Northern Ontario:

- Although the Northern Ontario Product Development Strategy does not list cycling specifically as a focus item, cycling tourism fits under the “Nature and Adventure” category of products which was indicated as a primary focus for development.
- Ontario MTCS numbers for the RTO 13 Cycling Activity Statistics ([Appendix IV](#)) shows that of the 8.1 million visitors to Northern Ontario in 2012, **73,974** persons (approximately 1%) enjoyed cycling while in the region. **97.1%** of visitors that enjoyed cycling also stayed overnight. **68%** indicated that their trip was for pleasure, while **28%** travelled to the area to visit friends and relatives. More statistical analysis is needed to determine visitor numbers when cycling is the key trip motivator, including total spending for these trips as well as the percentage of users that stay in overnight in roofed accommodations.
- Most importantly, the provincial focus on cycling as an Ontario-wide product development initiative has led to substantial funds being available for cycling tourism development at the current time. The focus is anticipated to lead to provincially-led workshops and targeted funding for cycling tourism marketing in the near future.

While Northern Ontario cycle tourism opportunities may be somewhat smaller market with less tie-in to TNO priorities than other primary focus product areas, provincial priorities and funding opportunities may be enough to justify developing Northern Ontario’s cycling resources in the short-term.



Of **8.1 Million** visitors to Northern Ontario, **73,974** persons enjoyed cycling in the region



97.1% of these visitors stayed overnight



while **28%** travelled to the area to visit friends & relatives



68% indicated that their trip was for pleasure



Cycling Tourism Work Plan for Northern Ontario

There are several steps required to further develop cycling tourism in Northern Ontario, from the first step designed to determine the market for cycling tourism and allow TNO to determine the opportunity related to proceeding with cycling tourism investment.



Seven Steps to Developing Cycling Tourism in Northern Ontario:





STEP 1: Undertake Cycling Market Research

TNO has completed market research related to seven specific product areas. Cycling could be considered to be included in the *High Yield Nature/Outdoors Tourists Situation Analysis* research, however it leaves many questions about the actual size and dollars in spending available by this marketing in Northern Ontario. TNO should consider contracting professional services to complete a cycling-specific research project in the interest of determining numbers related to tourists travelling to Northern Ontario with a key trip motivator related to cycling. If possible, break down the research by cycling activity type. Consider Ontario-wide numbers to determine the potential market and if cycling opportunities are worth the investment for the potential of future tourist visits. Further, contrast the numbers against other product considerations given the need to prioritize investments.

Based on the above research, determine:

- the level of investment to be made in cycling tourism in Northern Ontario;
- the level effort to be placed on securing funding to support initiatives; and
- the type of cycling to be the focus for development.

J **Timeline:** Short term

Northern Ontario Cycling Product Development Committee Role:

- Review the research outcomes
- Given research findings, provide input to TNO regarding the type of cycling to be the focus of further development



NOTE:

If the research shows unfavourable cycling market and TNO decides not to pursue cycling tourism developments, the workplan stops after step one. If this decision is made, consider if the opportunity exists to focus on developing community based cycling resources to benefit local resident fitness activities using the provincial resources currently available. If this approach is taken, the work plan will continue with slight modifications to steps two, three, five and marketing should target local residents.



STEP 2: Cycling Asset Inventory & Market-Readiness Assessment

An in-depth inventory of the cycling assets that fit the type of cycling that TNO has decided to pursue will allow an objective look at the assets that are available within Northern Ontario. Key assets should be assessed for market-readiness.

Criteria will need to be developed to complete the market-readiness assessment and should not only look at important factors like on-trail infrastructure but also details like proximity to market, supporting tourism operators in the area (i.e. accommodations, restaurants etc). Include criteria that fit the recommendations of the product development strategy to ensure that the Northern Ontario cycling product is different than that which is being offered by other areas and hinges on Northern Ontario's signature landscapes and waterways.

Market-readiness assessment of key Northern Ontario cycling assets and opportunities will allow TNO and the Cycling Product Development Committee to choose which cycling asset(s) to focus effort on going forward. Focusing on **one or two** key locations/routes will ultimately ensure objective and strategic assignment of resources to further develop and eventually market product that will attract cycling enthusiasts in a competitive market place.

⌋ **Timeline:** Short term

Northern Ontario Cycling Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the inventory and market-readiness assessment
- Review market-readiness outcomes and based on findings, provide input to TNO regarding asset(s) to be further developed





STEP 3: Develop Partnerships & Apply for Funding

Each cycling asset chosen for further development will have deficiencies in market-readiness or gaps that must be rectified to make the experience "best of the best." Partnerships should be developed to support the development of each asset. Available funding opportunities should be assessed and applications made to secure and leverage funds.

J Timeline: Medium term

Northern Ontario Cycling Product Development Committee Role:

- Assist with partnership building
- Assist with funding applications where expertise and administrative ability exists





STEP 4: Packaging & Theming the Experience

Packaging will look different depending on the type of cycling activity that is being pursued, but regardless, the objectives remain the same. Packaging supporting operators and attractions with a cycling asset will simplify the planning for the consumer. Refining the experience by theming the ride has the ability to enhance the experience for the consumer (for example Vancouver Craft Beer Bicycle Tour, Cycle Nova Scotia's Cabot Trail Cycling Route).

J **Timeline:** Medium term

could be done as an inclusion/follow-up to the Inventory and Market Assessment

Northern Ontario Cycling Product Development Committee Role:

- Provide input into packaging ideas
- Review packaging deliverables





STEP 5: Implement Product Enhancements

Implementing product enhancements to make the experience fully market-ready takes time and money. Often during this stage, partners are eager to jump to marketing. Ensuring the changes are implemented before marketing will ensure market-readiness.

⌋ **Timeline:** Medium to Long term

Northern Ontario Cycling Product Development Committee Role:

- Advocate for enhancements to be implemented





STEP 6: TEN & Cycle Friendly Certification

To make the Northern Ontario cycling experience exceptional, tourism assets that support the key cycling assets being developed should be quality, cycling-friendly establishments.

Ensuring supporting operators complete Ontario by Bike's Certification Criteria will assist operators in serving the cycling market. Encouraging supporting operators take part in the Tourism Excellence North (TEN) self-assessment, Fast Track to Success and/or group learning program will help to ensure the operators are focused on the quality of their establishments.

Timeline: Long Term

Northern Ontario Cycling Product Development Committee Role:

- Communicate endorsement and championing of benefits of TEN and Cycle-Friendly Certification to supporting operators





STEP 7: Cycling Marketing Plan

Once product development has been completed, the experience can be marketed. Collateral such photography, videos, a cycling map(s) and a website with trip planning information may be needed.

A cycling marketing plan should outline tactics to be used to push the experience to consumers. Care should be given to ensure tactics align with and leverage provincial marketing efforts to promote cycling tourism.

⌋ **Timeline:** Long term

Northern Ontario Cycling Product Development Committee Role:

- Review marketing plan and provide feedback on tactics



APPENDIX I:

Examples of Existing Cycling Infrastructure in Northern Ontario



COMMUNITY CYCLING ROUTES

Sault Ste. Marie (SSM)

Hub Trail

Over 30 km of dedicated signed trail that winds throughout the community.

North Bay

Discovery Routes Trails

Over 300 km of multi-use trails and cycling routes including the Trans Canada Trail.

Sudbury

Rainbow Routes

Over 200 km of trails throughout Sudbury of varying length, type and condition.

Thunder Bay

Thunder Bay Active Transportation Network

Over 45 km of multi-use recreational trails that span the city.

Kenora

Kenora Bicycle Routes

Over 113 km of marked recreational routes.



REGIONAL CYCLING ROUTES

<p>Sudbury to Sault Ste. Marie, Manitoulin & St. Joseph Island</p>	<p>Great Lakes Waterfront Trail</p>	<p>In 2017, the Lake Huron North Channel Waterfront Trail, some of the Manitoulin trails and St. Joseph Island trails will be incorporated into the Great Lakes Waterfront Trail network.</p>
<p>North Channel (Sault Ste. Marie to Sudbury)</p>	<p>Lake Huron North Channel Waterfront Trail</p>	<p>A 370 km signed and mapped cycling trail going through 21 communities along the North Shore of Lake Huron.</p>
<p>Deep River to Sudbury</p>	<p>Voyageur Cycling Route</p>	<p>A cycling tourism experience spanning 380 km across Northeastern Ontario from the Ottawa Valley to Sudbury East. Following the path of the Voyageurs over 400 years ago along three heritage waterways and 200-km of the Trans Canada Trail, the Route celebrates a national significance experienced at a human-powered pace.</p>
<p>Manitoulin Island</p>	<p>Manitoulin Island Cycling Routes</p>	<p>Offer over 800 km of on-road routes in 20 different loops and ride experiences spanning the entire island.</p>
<p>St. Joseph Island</p>	<p>The roads of St. Joseph Island</p>	<p>St. Joseph Island has a varied terrain for cyclists looking for different types of challenges. And with a few exceptions of country roads, the majority of the roads are surface-treated. The total distance around the island via Hwy 548 is 70 km. Cyclists can also choose a variety of routes from the many roads that criss-cross the island.</p>



MOUNTAIN BIKING

**Heyden
(near Sault Ste.
Marie)**

Bellevue
Valley Trail

This 15 km trail includes advanced features including some ladders and jumps. The loop involves 700 feet of descending and climbing.

**Mattawa
& area**

Voyageur
Multi-use Trails
System (VMUTS)

A 200 km network of interconnected trails along old logging and forest access roads.

Manitoulin

McLean's
Mountain Bike
Park

Offers 45km of off-road trails set in a beautiful maple forest.

Sault Ste. Marie

Hiawatha
Highlands Trail

There are numerous trail options on this 60 km of multi-use trail (cross-country ski trails in winter).

**Off of Hwy 17,
north of Sault Ste.
Marie**

Stokely Creek Trail

This 10 km trail winds through Algoma Highlands Conservancy lands on cross-country ski trails.

Thunder Bay

Trowbridge Park,
Shuniah Mines,
and Loch Lomond

Mountain biking master plan development began in spring of 2016.





SPECIALTY CYCLING

Sault Ste. Marie

Velorution
Dirt Park

Located at the Velorution Bike shop, this park includes a pump track and jump park, designed to help develop agility and off-road bike handling skills.

Thunder Bay

Jumbo Gardens
BMX Park

Featuring a trail system combining jumps and challenges for beginner to advanced BMX riders.

Nipigon, Red Rock & Lake Helen First Nations

Nipigon Pump
Track, Pull-A-Log
Pump Track, Lake
Helen Pump Track

A variety of pump tracks scattered throughout these North Shore of Lake Superior communities.



APPENDIX II:

SWOTT Analysis

During the Northern Ontario Tourism Summit held in Sault Ste. Marie in November 2015, a cycling tourism focus group session was held with 15 participants in attendance. Their input regarding questions posed about trends and opportunities was as follows:

What is the single biggest shift you are seeing?

- Large-scale events
- Increase in participation
- Larger groups
- Families
- Increased demand for accommodation
- Cross-Canada touring
- Increased demand for self-guided
- Participation in daily events
- New generation of cyclists
- Community-based; most cities doing it, infrastructure
- Increase in popularity
- Replacing golf
- International cycling holidays
- More U.S. cyclists
- Change in technology - more road mountain, fat tires, cross-overs
- Shift in attitude on bike lanes
- Come with bike on car
- Not easily identified as cyclist as takes a shower then goes to restaurant
- Different types of cyclists
- Increase in multi-modal - car/train/bus and bike; drive & ride

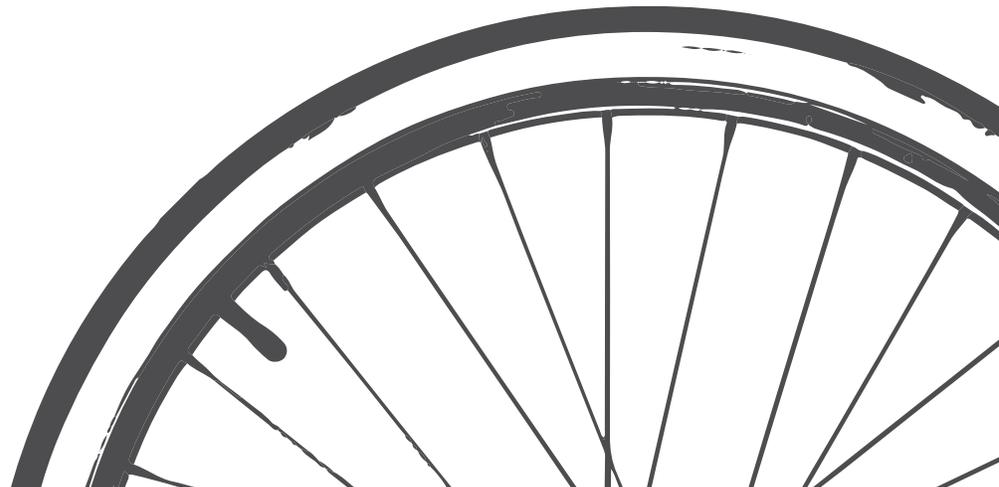


What is one **NEW** product or experience that Northern Ontario can deliver to attract new visitors in the next 3 years?

- Mountain biking trail packages - hard core or family packages; identify trails in different regions
- Provincially-recognized routes
- Regional maps/mapped itineraries of cycling opportunities in each region; guide book; need asset inventory of cycling trails

- Themed cycling tours (food tour, wine/beer tour, farm-to-table) on recognized routes
- Maple syrup cycling tour

- Cycling tours
- Recognized routes with international linkages
- Connections to Quebec/Manitoba to make inter-provincial routes
- Routes that showcase our natural beauty such as Great Lakes





- + Developing cycling trail product on Manitoulin and St. Joseph Islands, Georgian Bay, Lake Huron North Channel Waterfront Trail, Voyageur Cycling Route (North Bay/Mattawa/Sudbury).
- + Manitoulin Island has been successful in building the Island's reputation as an attractive cycling destination with an annual event and promotion of 20 loops offering over 800 km of interesting cycling.
- + St. Joseph Island is a well-known cycling destination for local cyclists and cycling groups. Its popularity can be leverage to attract cyclists from farther afield.
- + Scenic, cultural and historic assets that cyclists seek.
- + Cycling tourism product development team in place.
- + Mountain biking master plan process completed in Thunder Bay.

- Lack of amenities between towns and villages on cycling routes.
- Lack of cycling infrastructure (cycling lanes). Cycling lanes/paved shoulders on highways. Gravel surfaces especially soft gravel needs to be resurfaced. Multi-use trail running parallel to Highway 55 in Sudbury needs major improvements to surface and grading to serve long-distance cycle tourists.
- Lack of packaging/theming and/or trip planning options.
- Lack of marketing



OPPORTUNITIES

- Bike tourism is increasingly seen as an emerging sector in global travel markets.
 - Biking events are expanding and thriving.
 - Tremendous increase in all types of cycling for all ages.
 - Need official designated, signed, mapped Northern Ontario route with Great Lakes, self-guided opportunities.
 - Develop the Duluth to Thunder Bay route and investigate status of possible project (Kinghorn Trail) on the CN line east of Thunder Bay to Nipigon.
 - Hard days/soft nights – stay at spa/fixed roof accommodators.
- Develop five themed tours – food, water-based, maple syrup, hike and bike, etc.
 - Funding for cycling events through Celebrate Ontario and for product development through the Tourism Development Fund.
 - Other potential funding programs, i.e., NOHFC, FedNor.
 - Provincial commitment to closing gaps on existing routes with the goal of creating a provincial network of bike routes.
 - Government looking for evidence of local support of non-motorized travel.
- \$10M Ontario Municipality Infrastructure Cycling Program (however only four Northern municipalities were funded in 2016).
 - Marinas in Northern Ontario (eight along the LHNC) serve as excellent staging areas for cyclists with access to WiFi, showers and provisions.
 - MTO highway rest stops could be equipped to serve as cycling rest stops.
 - International connection to the U.S. in Sault Ste. Marie (connection to United States bicycle route system) and Thunder Bay.
- Transportation options programs:
 - » Have Ontario by Bike network set up for businesses across Manitoulin and La Cloche, 32 businesses certified as bicycle- friendly.
 - » North Bay, Mattawa and West Nipissing have 13 businesses certified as bicycle- friendly.
 - » 34 bicycle-friendly businesses in the Parry Sound area.
 - » They have outreach kits and brochures to pass on to businesses in any area.



THREATS

- Competition: major bike networks have been adding new segments and new miles, especially in the U.S. and Europe. The fast-growing **U.S. Bicycle Route System** in 2015 encompassed 6,790 miles in 15 states, with new routes up for approval in Florida, Maryland, Massachusetts and Michigan. More than 40 states are planning, implementing and promoting U.S. Bicycle Routes.
- Lack of awareness of benefits of cycling tourism in communities and businesses.
- Safety issues (road riding etc.).
- Liability/regulatory issues.
- Inequitable distribution of \$10M Ontario Municipality Infrastructure Cycling Program in Northern Ontario compared to other regions of the province.





TRENDS

- Development of moderate-distance bike route networks tied to a region's scenic, cultural and historic assets.
.....
- Boom in companies offering short tours (single day and shorter) in cities.
.....
- No "turn away" for travelling cyclists in U.S. parks.
.....
- Bike shares and bike rentals.
.....
- Biking events growing.
.....
- Self-guided tours growing in popularity.

APPENDIX III:

Purpose of the Cycling Product Development Committee

Members of the Northern Ontario Cycling Product Development Committee were selected based on their experience in cycling in Northern Ontario, their overall understanding of tourism in the region and its unique natural, cultural and heritage attractions, their knowledge of relevant policies and regulations and their track record in tourism product development. Additionally, the Committee members play an ongoing role in advising TNO on the best avenues for focused community engagement and communication of critical information.

The team aids and advises TNO on the enhancement and development of cycling products in Northern Ontario, drawing on their knowledge, the available research and the recommendations for cycling tourism as outlined in the Northern Ontario Tourism Product Development Strategy. TNO capitalizes on members' knowledge of cycling as a tourism product in Northern Ontario and utilizes their feedback and advice to action this product niche.



Role of the Cycling Product Development Committee

Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more cycling visitors to Northern Ontario with the main objectives of offering a world-class experience, resulting in tourists staying longer and spending more money. They will also encourage activities that support cycling tourism product development that is complimentary and coordinates well with other product niches in a sustainable way.



Cycling Product Development Committee Members

NAME	ORGANIZATION	TELEPHONE	EMAIL
Donna Hilsinger	Private Sector	705-945-7632	dhilsinger@watertowerinn.com
Ian McMillan	Tourism Sault Ste. Marie	705-759-5432	i.mcmillan@ssmedc.ca
Jennifer McCourt	Discovery Routes	705-472-8480	jennifer@discoveryroutes.ca
James Antler	Ontario Ministry of Tourism, Culture & Sport	705-494-4159	james.antler@ontario.ca
Maja Mielonen	Manitoulin Island Cycling Advocates	705-377 4471	majasilk@amtelecom.net
Mark Maranzan	Black Sheep Mountain Bike Club	807-355-1665	markmaranzan@gmail.com
Marlaine Koehler	Waterfront Regeneration Trust	416-520 4205	mk@wrtrust.com
John Cameron	City of Thunder Bay	807-625-3231	jcameron@thunderbay.ca
Louisa Mursell	Transportation Options	416-827-2774	lmursell@transportationoptions.org
Michael Wozny	Wozny & Associates	705-542-8572	m.w.wozny@sympatico.ca
Rod Bilz	3 Seven Solutions	705-493-7403	rod.bilz@3sevensolutions.com
Steve Bruno	Ontario Tourism Marketing Partnership Corp.	226-339-2510	steve.bruno@ontario.ca

APPENDIX IV:

Regional Tourism Organization (RTO) 13 Cycling Activity Statistics 2012

SOURCE: Ontario Ministry of Tourism Culture and Sports

NOTE: due to changes in 2012 survey methodology domestic data is not comparable to prior years



RTO13 CYCLING STATISTICS – 2012

Total Visits	Total	Canada	Ontario	Other Canada
Total Unweighted	53	53	38	15
Total Household/Party Visits (Weighted)	43,659	43,659	37,388	6,271
Total Person Visits (Weighted)	73,974	73,974	65,477	8,498
Length of Stay (Person Visits)	-	-	-	-
Overnight	71,815	71,815	63,317	8,498
Same-Day	2,160	2,160	2,160	-



RTO13 CYCLING STATISTICS – 2012

Main Purpose of Trip (Person Visits)	Total	Canada	Ontario	Other Canada
Pleasure	50,607	50,607	47,960	2,647
VFR	20,878	20,878	15,027	5,851
Shopping	-	-	-	-
Conventions (Personal)	2,490	2,490	2,490	-
Study	-	N/A	N/A	N/A
Business	-	-	-	-
Meetings	-	-	-	-
Conventions (Business) & Conferences	-	-	-	-
Other Business	-	-	-	-
Other Personal	-	-	-	-
Quarter Trip Started (Person Visits)				
Q1 (Jan - Mar)	-	-	-	-
Q2 (Apr - Jun)	-	8,894	6,638	2,255
Q3 (Jul - Sep)	-	58,186	51,944	6,242
Q4 (Oct - Dec)	-	6,894	6,894	-



RTO13 CYCLING STATISTICS – 2012

Accommodation Type (Person Visits)	Total	Canada	Ontario	Other Canada
Roofed commercial	7,437	7,437	7,437	-
Hotels	327	327	327	-
Motels	-	-	-	-
Commercial cottage/ cabins	4,620	4,620	4,620	-
Other roofed commercial	2,490	2,490	2,490	-
Camping/RV facilities	26,938	26,938	24,958	1,981
Private homes/cottages	37,440	37,440	30,923	6,517
Private homes	11,095	11,095	5,104	5,990
Private cottages	26,345	26,345	25,819	526
Other accommodation type	-	-	-	-







RTO13 CYCLING STATISTICS – 2012

Main Purpose of Trip (Person Visits)	Total	Canada	Ontario	Other Canada
Total Nights	300,415	300,415	238,779	61,636
0 nights (Person Visits)	2,160	2,160	2,160	-
1 night (Person Visits)	11,258	11,258	9,467	1,791
2 nights (Person Visits)	24,687	24,687	24,206	481
3 nights (Person Visits)	3,990	3,990	3,754	236
4 nights (Person Visits)	5,395	5,395	3,886	1,508
5 nights (Person Visits)	2,333	2,333	832	1,501
6 - 9 nights (Person Visits)	23,127	23,127	21,170	1,957
10+ nights (Person Visits)	1,024	1,024	-	1,024
Average nights of total visits	4.1	4.1	3.6	7.3
Average nights of overnight visits	4.2	4.2	3.8	7.3



RTO13 CYCLING STATISTICS – 2012

Number of Nights by Accommodation Type	Total	Canada	Ontario	Other Canada
Nights in roofed commercial	39,641	39,641	39,641	-
Nights in hotels	1,961	1,961	1,961	-
Nights in motels	-	-	-	-
Nights in commercial cottage/cabins	27,721	27,721	27,721	-
Nights in other roofed commercial	9,959	9,959	9,959	-
Nights in camping/RV facilities	62,697	62,697	60,236	2,461
Nights in private homes/cottages	198,077	198,077	138,902	59,175
Nights in private homes	80,110	80,110	21,933	58,177
Nights in private cottages	117,967	117,967	116,970	998
Nights in other	-	-	-	-





RTO13 CYCLING STATISTICS – 2012

Activities Participated (Person Visits)	Total	Canada	Ontario	Other Canada
Festivals/Fairs	8,802	8,802	7,853	948
Cultural Performances	12,935	12,935	10,111	2,824
Museums/Art Galleries	2,451	2,451	1,487	964
Zoos/Aquariums/Botanical Gardens	1,541	1,541	494	1,046
Sports Events	2,068	2,068	822	1,245
Casinos	120	120	-	120
Theme Parks	3,941	3,941	2,493	1,447
National/Provincial Nature Parks	23,670	23,670	20,215	3,455
Historic Sites	5,710	5,710	3,917	1,792
Any Outdoor/Sports Activity	73,974	73,974	65,477	8,498
Boating	54,218	54,218	47,207	7,012
Golfing	14,759	14,759	12,086	2,673
Fishing	36,248	36,248	29,191	7,057
Hunting	891	891	-	891
Downhill Skiing/ Snowboarding	-	-	-	-



RTO13 CYCLING STATISTICS – 2012

Household/Party Size & Composition	Total	Canada	Ontario	Other Canada
Total household/party visits	43,659	43,659	37,388	6,271
1 person (Party Visits)	-	-	-	-
2 persons (Party Visits)	-	-	-	-
3 or more persons (Party Visits)	43,659	43,659	37,388	6,271
Average party size	1.6	1.6	0.6	4.0
Party with adult(s) only (%)	48%	48%	41%	84%
Party with children (%)	52%	52%	59%	16%
Age of Respondents (Person Visits)				
Under 15 years	-	N/A	N/A	N/A
15 - 24 years old	5,152	5,152	4,128	1,024
25 - 34 years old	14,067	14,067	12,579	1,488
35 - 44 years old	23,576	23,576	20,365	3,211
45 - 54 years old	19,290	19,290	18,539	751
55 - 64 years old	4,529	4,529	3,685	844
65+ years old	7,361	7,361	6,181	1,180
Age not stated	-	N/A	N/A	N/A
Average age	43.0	43.0	43.1	42.4



RTO13 CYCLING STATISTICS – 2012

Gender of Respondents (Person Visits)	Total	Canada	Ontario	Other Canada
Male	45,754	45,754	41,138	4,616
Female	28,220	28,220	24,339	3,881
Education Level of Respondents (Person Visits)				
Less than high school graduation certificate	5,624	5,624	4,357	1,267
High school graduation certificate only	5,850	5,850	5,078	772
Some post-secondary certificate or diploma	43,753	43,753	41,774	1,978
University degree (Bachelor's, Master's or PhD)	18,748	18,748	14,267	4,481
Not Stated	-	-	-	-
Household Income of Respondents (Person Visits)				
Less than \$50,000	4,202	4,202	1,688	2,514
\$50,000 to less than \$75,000	6,259	6,259	4,139	2,120
\$75,000 to less than \$100,000	20,127	20,127	18,256	1,871
\$100,000 and over	29,488	29,488	27,496	1,992
Not Stated	13,898	13,898	13,898	-



RTO13 CYCLING STATISTICS – 2012

Visitor Spending in Region	Total	Canada	Ontario	Other Canada
Total Visitor Spending	16,370,540	16,370,540	13,415,107	2,955,433
Overnight Visitor Spending	16,327,348	16,327,348	13,371,915	2,955,433
Same-Day Visitor Spending	43,192	43,192	43,192	-
Average Visitor Spending in Region				
Average per person	221	221	205	348
Average per person per overnight visit	227	227	211	348
Average per person per night	54	54	56	48
Average per person per same-day visit	20	20	20	-

Source:

This analysis is based on Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada and the International Travel Survey. All computations on these microdata were prepared by the Ontario Ministry of Tourism, Culture and Sport and the responsibility for the use and interpretation of these data is entirely that of the authors.

22-Apr-16



RTO13 CYCLING STATISTICS – 2012

Itemized Visitor Spending in Region	Total	Canada	Ontario	Other Canada
Total Visitor Spending	16,370,540	16,370,540	13,415,107	2,955,433
Transport (Total)	5,523,160	5,523,160	3,848,063	1,675,096
Public Transport	1,252,509	1,252,509	525,029	727,480
Canadian Fares	-	N/A	N/A	N/A
Other Public Transport	1,252,509	1,252,509	525,029	727,480
Vehicle Rental	-	-	-	-
Vehicle Operations	4,270,651	4,270,651	3,323,034	947,616
Local Transport	-	-	-	-
Accommodation	3,923,642	3,923,642	3,854,426	69,216
Food & Beverage (Total)	5,123,345	5,123,345	4,423,012	700,334
Food & Beverage at Stores	2,539,387	2,539,387	2,229,383	310,004
Food & Beverage at Restaurants/Bars	2,583,958	2,583,958	2,193,629	390,329
Recreation/ Entertainment (Total)	1,092,204	1,092,204	905,489	186,714
Recreation	659,268	659,268	602,627	56,641
Culture	432,936	432,936	302,862	130,073
Retail/Other (Total)	708,189	708,189	384,117	324,073
Clothing	367,918	367,918	136,880	231,039
Other Retail	340,271	340,271	247,237	93,034



RESOURCES:

Adventure Cycling Association:

www.adventurecycling.org/routes-and-maps/us-bicycle-route-system

Cycling in Northern Ontario:

Lynes, J. (2013). *Cycling in Northern Ontario (CHAPTER) in Cycling in Ontario Guide Book*. Ulysees Green Escapes Guides.

Discovery Routes – discoveryroutes.ca/vcr

The Véloroute Voyageur Cycling Route is Ontario's next major cycling tourism experience spanning 380-km across Northeastern Ontario from the Ottawa Valley to Sudbury East. Following the path of the Voyageurs over 400 years ago along three heritage waterways and 200-km of the Trans Canada Trail.

Iowa Trails 2000:

www.iowadot.gov/iowabikes/trails/iowatrails2000.html

Lake Huron North Channel Cycling Route:

www.waterfronttrail.org/waterfront-news/330-lhnc

Manitoulin Island Cycling Advocates:

www.manitoulincycling.com

Ministry of Transportation Ontario - #CycleON, Ontario's Cycling Strategy:

www.mto.gov.on.ca/english/publications/pdfs/ontario-cycle-strategy.pdf

MTO Cycling Training Fund:

www.mto.gov.on.ca/english/safety/cycling-training-fund.shtml

Ontario By Bike – www.ontariobybike.ca

For cyclists, the Ontario By Bike Network offers a variety of information on cycling in Ontario, inspiring visitors and residents to explore more by bike. Find great places to cycle, links to useful cycling maps and plan your day trip or multi day cycling itineraries with stops at certified bicycle friendly businesses en-route.

Ontario Trails Strategy:

www.mtc.gov.on.ca/en/sport/recreation/A2010_TrailStrategy.pdf

Quebec Route Verte:

www.routeverte.com/e/historique_e

Waterfront Trails:

www.waterfronttrail.org



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