

**GEORGIAN BAY CYCLING ROUTE
FEASIBILITY STUDY**

Implementation Plan

Prepared for

The Georgian Bay Cycling Route Steering Committee

Prepared by

**Transportation Options Association of Ontario &
The Resource Management Consulting Group**

May 12, 2014

This project was made possible through funding by:



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Acknowledgements

The Georgian Bay Cycling Route (GBCyR) Feasibility Study was made possible by funding from FedNor, the Ontario Government and the Heart and Stroke Foundation. It was administered by the LaCloche Manitoulin Business Assistance Corporation (LAMBAC) and overseen by the GBCyR Steering Committee:

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Since 2010, the Manitoulin Island Cycling Advocate volunteers have given countless volunteer hours to conceptualizing and promoting of the GBCyR. The 2012 Concept Study, prepared by Denis Baldwin and Manitoulin Island Cycling Advocates, was instrumental in identifying the route and garnering support for GBCyR throughout the Georgian Bay Region.

As part of this project, 65 representatives of municipalities, tourism organizations, health units and cycling clubs participated in workshops held in Little Current, Sudbury, Parry Sound, Gravenhurst, Midland, Collingwood, Owen Sound and Wiarton or were interviewed by telephone. They provided important local input to refine the route, and they helped obtain formal letters of support for the cycling route from their organizations. Staff of the Ministry of Transportation Northeastern Region and the Sustainable and Innovative Transportation Office provided insight regarding issues pertaining the provincial highways and secondary roads, as well as perspective regarding the CycleOn Strategy.

The consulting team responsible for this project was:

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Foreword

This report was presented by Transportation Options and RMCG to The GBCyR Steering Committee on April 16, 2013. At this meeting, The Steering Committee voted unanimously for the Waterfront Regeneration Trust to become the new governing organization. The Waterfront Regeneration Trust accepted the challenge and has now taken over full responsibility for implementing the GBCyR from the Steering Committee.

As a result, throughout this report, all references to “the new governing organization” can be taken to mean The Waterfront Regeneration Trust.

1 Introduction

1.1 Vision

The Georgian Bay Cycling Route (GBCyR) will be a 1,000 kilometer long, signed Signature Cycling Route around Georgian Bay that connects communities around the Bay to develop the region's cycling tourism potential.

1.2 Objectives

The objectives of the route are to:

- Be owned and maintained by the communities along the route and incorporated into their asset management plans,
- Be promoted as a provincial tourism asset and attraction,
- Benefit cyclists, cycle tourists and local businesses and municipalities in the region,
- Link together the growing network of designated bicycle routes in the Georgian Bay region, and evolve as they continue to expand, and
- Create a signature cycling route, to strengthen Ontario's positioning as a cycling destination.

1.3 Route Description

The GBCyR has been planned, in conjunction with local municipalities, to follow existing trails and roads as close to Georgian Bay as possible. It will allow cyclists to enjoy the beauty of the region, as well as views and access to the shoreline. In some places, the GBCyR goes right along the shore, in others it is a considerable distance back from the bay, traversing farmland, forest or the rocky terrain of the Canadian Shield. The GBCyR connects the culture, heritage and lifestyles of 35+ communities around Georgian Bay with two UNESCO World Biosphere Reserves, two National Parks, 15 Provincial Parks and includes a Chi-Cheemaun ferry crossing to Manitoulin Island.

Eight hundred kilometers¹ of the GBCyR is implementation-ready, from Town of Parry Sound, south around Georgian Bay to the City of Greater Sudbury. In two places, alternative routes have been provided:

- Muskoka District – For cyclists with time, Core Route B (62 km) offers a longer, scenic ride along the shore of Georgian Bay Township towards Honey Harbour, than the more direct Core Route A.
- Manitoulin Island – For cyclists who want to experience the interior of the Island. The Core B Route (83 km) offers a scenic ride into the heart of Manitoulin Island

¹ All distances are rounded based on a combination of routing recommended by consultants and/or approved by GBCyR Steering Committee. These distance calculations are subject to change as the route evolves during the implementation phase. These distances have been used for preparing the benefit cost assessment and implementation plan. References for route calculations can be found at:

- GBCyR Parry Sound to Sudbury, Core Route A (approximately 672 km) www.mapmyride.com/routes/view/355043529
- GBCyR full circuit, Core Route A (approximately 865km) www.mapmyride.com/routes/view/355095817
- Muskoka Honey Harbour Core Route B (approximately 62 km) www.mapmyride.com/routes/view/355150241
- Manitoulin Core Route B short (approximately 83 km) www.mapmyride.com/routes/view/355154443

Completion of the final 200 km between Sudbury and Parry Sound, will require support of the Ontario government and Ministry of Transportation. Once the ongoing Highway 69 four-lane project is complete, cycling will no longer be possible within the new highway right-of-way. This will leave two gaps (one of 40 km and another of 7 km for a total of approximately 47km²), making it impossible to cycle from Parry Sound to Sudbury. In light of the Ontario Government's 2013 #CycleOn Strategy, the GBCyR Steering Committee has initiated meetings with the Ministry of Transportation to investigate opportunities to make the GBCyR a complete loop around Georgian Bay.

The proposed GBCyR has been mapped in MapMyRide, and an overview map is a screenshot of the entire route and is provided as Map 1. A tabular summary describing the route by county and district is provided in Table 1. More detailed maps and descriptions are included in Appendix A.

Map 1
GBCyR Overview



² See page 20 for more information on route gaps.

**Table 1
Route Description Summary**

County or District	Length	Towns/Townships/ First Nations	Description
Parry Sound District	114km	Seguin Parry Sound McDougall Carling Shawanaga FN	<ul style="list-style-type: none"> - Follows primarily township and town roads, with some 2-lane secondary roads in northern parts. - Town of Parry Sound is a major service centre for visitors. - Georgian Bay views along Parry Sound waterfront. - <i>After Highway 69 four-lane is complete, cycling will not be possible through a 7 km gap between the Pickerel Lake and Highway 522 interchanges.</i>
Muskoka District	A=84 km A+B =146 km	Muskoka Lakes Georgian Bay	<ul style="list-style-type: none"> - Follows Muskoka District Roads, some with paved shoulders. - Mactier, Bala, Honey Harbour and Port Severn provide a wide range of visitor services. - Georgian Bay views along parts of Core Route B from Honey Harbour to Waubeshene.
Simcoe County	126 km	Severn Tay Midland Penetanguishene Tiny Wasaga Beach Clearview Collingwood	<ul style="list-style-type: none"> - Follows existing trails (some screenings, some paved) as well as town and township roads. - Waubashene, Midland, Penetanguishene, Wasaga Beach and Collingwood provide a full range of complete visitor services along the main route. - Georgian Bay views along much of the route from Waubashene to Penetanguishene and in Tiny Township and Wasaga Beach.
Grey County	120 km	Blue Mountains Meaford Owen Sound	<ul style="list-style-type: none"> - Follows existing trails (screenings) as well as county, town and township roads. - Blue Mountain Village, Thornbury, Meaford and Owen Sound provide a full range of visitor services. - Georgian Bay views along Georgian Trail & north of Owen Sound.
Bruce County	89	S. Bruce Peninsula N. Bruce Peninsula	<ul style="list-style-type: none"> - Follows provincial Highway 6, as well as county and township roads. - Wiarton, Lion's Head and Tobermory provide a wide range of visitor services. - Georgian Bay views along parts of the route.
Manitoulin Island	A=75km B=83 km A+B=158	NEMI Tehkummah Central Manitoulin Assiginack Billings Sheguiandah FN	<ul style="list-style-type: none"> - Core Route A follows Highway 6, with paved shoulders; Core Route B follows provincial secondary roads and township roads. - South Baymouth, Manitowaning and Little Current provide a full range of visitor services. - Georgian Bay and Lake Huron views along parts of the route.
District of Sudbury (DS) <i>West of City of Greater Sudbury (CGS)</i>	57 km	Espanola Baldwin Nairn & Hyman Whitefish Falls FN	<ul style="list-style-type: none"> - Follows provincial Highways and township roads. - Espanola provides a full range of visitors services. - Follows the Lake Huron North Channel Cycling Route from Espanola to City of Greater Sudbury. - <i>Safety concerns about Highway 17 and Spanish River crossing due to high traffic volumes and absence of paved shoulders.</i>
<i>CGS west of Downtown</i>	35km		<ul style="list-style-type: none"> - Follows City of Sudbury roads and trails. - A full range of visitors services is available at various places along the route and in Downtown Sudbury. - <i>Route will be finalized through discussions with representatives of the City and Lake Huron North Channel Cycling Route.</i>
<i>CGS south of Downtown</i>	70 km		<ul style="list-style-type: none"> - Follows CGS cycling infrastructure including roads and trails. - <i>As a result of the ongoing Highway 69 four-lane project, the cycling infrastructure is discontinuous for approximately 40 km through this section.</i>

1.4 Benefits of the Georgian Bay Cycling Route

Communities along the GBCyR were very supportive of the GBCyR because the infrastructure investment would be low and the benefits would be substantial.³ They support the concept because it will:

- Result in a 1000 km high-profile bicycle route that is suitable for a wide variety of cyclists,
- Support the communities' ongoing initiatives related to Active Transportation, off-road cycling trails, paved shoulders and designated on-road cycling routes, and
- Help communities set priorities for cycle route/trail development and enhancement.

Many destination marketing/management organizations and tourism businesses along the GBCyR are currently investing in cycle tourism product development to attract more visitors, increase their length of stay and increase visitor spending. The GBCyR aligns with these ongoing cycle tourism initiatives because it will:

- Help communities meet the growing demand for safe cycle tourism by expanding the opportunities for recreational, experienced and touring cyclists;
- Be a new product that aligns with tourism positioning of the community destination marketing organizations: active, outdoor recreational experiences;
- Link many of the existing tourism attractions along Georgian Bay, providing an alternative to car transportation and a fresh way to market tourism attractions; and
- Complement and further promote the communities and tourism businesses already participating in the Ontario By Bike Network (formerly the Welcome Cyclists Network).

The GBCyR aligns with *#CycleON*⁴, the new Ontario government strategy to encourage the growth of cycling and improve the safety of people who cycle across the province. It will help Ontario residents reap the benefits identified in the *#CycleON* strategy:

- Improved personal and public health for residents and visitors to the region,
- Cleaner environment by providing an alternative to road transportation for residents and visitors,
- New tourism product to meet the growing demand for cycling experiences, and
- New business opportunities to service residents and visiting cyclists.

At 1000 km, GBCyR has the potential to become Ontario's third signature cycling route and the second-longest route in the province. Its length and concept aligns with Ontario's two longest cross regional, signed routes: the Waterfront Trail (1400 km) and the Ontario Greenbelt Cycling Route (450 km, to be launched 2015).

The Georgian Bay Cycling Route Benefit and Cost Assessment 2014 was prepared by Transportation Options and RMCG and can be found in Appendix C of this report.

³ The list of municipalities and other organizations supporting GBCyR is provided in Appendix B.

⁴ <http://www.mto.gov.on.ca/english/pubs/cycling-guide/pdfs/MTO-CycleON-EN.pdf> *#CycleON: Ontario's Cycling Strategy*, Ontario Ministry of Transportation, 2013

2 Implementation Plan

2.1 Description

Phase 1 – Transition

Preparation of this Feasibility Study and Implementation Plan was guided by a Steering Committee of committed volunteers, administered by LAMBAC and funded by FedNor, Government of Ontario and the Heart and Stroke Foundation. Upon completion of this report, and the decision by the Steering Committee that the GBCyR is feasible and should move forward, responsibility for the project should be transferred to the new governing organization and the Steering Committee should dissolve. There are six important stages to this transition process.

Stage 1.1 Strike a Transition Subcommittee

A Transition Subcommittee should be formed and tasked with the responsibility to enter discussions for transfer of the GBCyR project to the new governing organization. The Subcommittee should be formed of two to three people, including a representative from LAMBAC, who can speak on behalf the entire GBCyR project and are prepared to represent GBCyR in discussions with the new governing organization. The Transition Subcommittee should agree upon a single spokesperson to represent the subcommittee in governance negotiations and in any other matters related to the GBCyR during the transition period.

Stage 1.2 Discussions with the New Governing Organization

Discussions should be held between the Transition Subcommittee and the new governing organization that will lead to a smooth transition of the GBCyR from the Steering Committee, chaired by LAMBAC, to the new organization. The Transition Subcommittee should provide a project update and share all project information about the GBCyR including: Feasibility Assessment, road and trail jurisdictions, letters of support, Benefit and Cost Assessment, Implementation Plan, past discussions with representatives of the Lake Huron North Shore Cycling Route, outcomes of advocacy initiatives regarding the Highway 69 gaps and anything else that will help the new organization take the project forward.

Together, the Transition Subcommittee and new organization should work out: the time frame for transition, details regarding the role of GBCyR Transition Subcommittee during the transition period and anything else that will facilitate smooth transition to the new organization.

Stage 1.3 Continue Stakeholder Engagement

Throughout the Feasibility Study, contact was made with municipalities, First Nations, destination marketing/management organizations, regional tourism organizations, cycling organizations and businesses as well as representatives of the Ministry of Transportation. Almost all provided letters of support for the GBCyR and many are actively developing cycling routes and related infrastructure. The Transition Subcommittee should provide an update to these groups once agreement to proceed has been reached with the new organization.

Depending on how long the transition period lasts, it may be necessary for the Transition Subcommittee to provide additional updates to stakeholders.

Stage 1.4 Continue Liaison with Lake Huron North Channel Cycling Route (LHNCCR) and Ministry of Transportation (MTO)

The Transition Subcommittee should assign responsibility to an individual(s) for continued liaison with representatives of the Lake Huron North Channel Cycling Route (LHNCCR) during the transition period. The proposed LHNCCR will go from Sault Ste. Marie to the City of Greater Sudbury and proposed GBCyR will go from Espanola to the City of Greater Sudbury. It would be logical for both cycling routes to follow the same course; however, at the time of writing this has not been resolved. Alignment of the two routes should continue to be a goal during the transition period.

The Transition Subcommittee should assign responsibility to an individual(s) to continue liaison with Ministry of Transportation regarding the Highway 69 gaps during the transition period. The outcomes of correspondence and meetings should be recorded to share with the new governing organization because it will be important for the new governing organization to continue to pursue a meeting with the MTO senior management, the Minister and the Minister's staff as soon as possible and continue communications with all MTO contacts. During this Feasibility Study, MTO was contacted:

- The Steering Committee sent a letter describing the GBCyR and a request for meeting to discuss the infrastructure gap areas to the Minister of Transportation, the Honourable Glen Murray. The letter was sent in January 2014; however, at the time of writing, a meeting date with the Minister, Minister's office or Assistant Deputy Minister was still a work in progress.
- The consulting team held meetings with staff of two divisions: the Planning and Design Section, Northeastern Region, MTO Provincial Highways Management Division and the Sustainable and the Innovative Transportation Office, Transportation Policy Branch, MTO Policy and Planning Division. The outcomes of these meetings are recorded into this report (Phase 3 Implementation, Stage 3.4 Infrastructure).

Stage 1.5 Transfer Responsibilities to New Governing Organization

After all details regarding the transfer of GBCyR to the new governing organization are solidified, all aspects of the implementation and ongoing management of the GBCyR will become the responsibility of the new organization.

Stage 1.6 Steering Committee Dissolves

Once the new organization is in place, the Steering Committee and Transition Subcommittee should be dissolved. The responsibility for liaison regarding the LHNCCR and Highway 69 gaps will also be transferred to the new organization.

Phase 2 – Preparing for Implementation

After the new organization takes over, it will be important to integrate the GBCyR into its internal priorities and workload and to develop external relationships with the partners. Priority should be given to preparing funding proposals and applications to assemble the resources needed to begin Phase 3, Implementation.

Stage 2.1 Establish GBCyR as Mandated Project

The new organization should establish GBCyR as a mandated project within its strategic, business and operational plans. As such, the implementation of GBCyR will be guided by the organization's Board of Directors.

Stage 2.2 Develop Relationships with Partners

The new organization should immediately start developing strong relationships with regional partners, including counties, districts, townships, tourism organizations, health units and cycling organizations. In particular, if the LHNCCR route into Sudbury has not been finalized, resolution of a mutually agreeable route should be a high priority. The new organization should also continue discussions with MTO regarding:

- The use and signage of paved shoulders along the sections of the route that follow provincial highways, and
- Feasible routes for a continuous cycling connection between Parry Sound and Sudbury.

Stage 2.3 Funding Applications

At the outset, the new organization should source multi-year project funding from a single funder or a collaborative funding partnership. A multi-year funding commitment will be essential to ensure that implementation of the GBCyR is not stalled or even stopped part way through. The project should move seamlessly through the implementation stages and tasks, without multi-year funding, tasks and approvals would likely have to be updated for each new funder, ultimately slowing down route development and launch.

When developing a strategy for submitting funding applications, the following should be taken into account:

- Developing funding relationships, applications and approvals for this scale of a project will take a minimum of 3 to 6 months, 12 months or possibly longer.
- Applying for funding is a highly competitive process, with limited funds available, the governing organization, project managers and staff person/s writing applications need to have experience developing funding relationships and writing successful applications. Completing any application requires a significant amount of staff time, and in the case of this project staff time would likely need to be underwritten by the governing organization.
- Funds of this magnitude are generally only available to Ontario registered charities and incorporated not-for-profit organizations.
- Funds of this magnitude are usually only available to charities and organizations with a proven history of financial accountability.
- Prior to submitting applications, the governing organization should connect with program managers to sound out application and potential for funding. Often this comes in an informal personal meeting and sometimes a more formal letter of inquiry is requested.
- Most funding programs have annual or biannual application deadlines, some accept applications on an on-going basis.

- To access many of these funds, partnerships and collaborations showing funding coming from additional sources, and/or support from a variety of partners (in-kind or cash contribution) is needed as well as letters of support for the project.

Potential funding sources are listed below and grouped by higher and lower priority based on alignment with the GBCyR project. Before submitting an application, direct contact with potential funder is mandatory to further establish GBCyR's eligibility for funding. The aspects of the GBCyR project that could potentially be funded by these sources and fall under their eligibility criteria are identified, where possible, under the four stages of implementation categories: management, marketing, signage and infrastructure.

**Table 2
Potential Funding Sources**

	Management	Marketing	Signage	Infrastructure	Notes
Higher Priority Potential Funding Sources					
Ontario Trillium Foundation www.otf.ca	X	X	X		Multi year funding, province-wide stream, may or may not align with current funding priorities
FedNor www.fednor.gc.ca	X	X			Applicant must be based in Northern Ontario, GBCyR may be eligible under the community economic development priority area
Tourism Development Fund Ontario Ministry of Tourism, Culture and Sport (OMTCS) www.ontario.ca or HERE direct.	X		?		New product, governance and organization focus, no marketing funds provided.
Rural Economic Development (RED) Program Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) www.omafr.gov.on.ca or HERE direct	X	X			Under the 'Implementation Stream' rural, community and regional projects eligible, with no other Provincial funding sources
Ontario government, funding from new project streams and strategies	?	?	?	?	May be applicable if funding in relation to the updated MTCS Ontario Trails Strategy and/or MTO #CycleON becomes available
Municipalities / regions contribution	X	X	X	X	Each has their own budgets and priorities. Responsible for Installation of signs
Regional Tourism Organizations 7, 12 and 13a		X	X		Product development and marketing partnership funding, variety of eligibility and project requirements
Ministry of Transportation				X	Community and municipal applications, or by special agreement
Lower Priority Potential Funding Sources					
Corporate sponsors and environment funds		X	X		A variety of corporations may have funding streams that are applicable. Large corporate sponsors require a well-developed relationship to access any significant funding

Table 2
Potential Funding Sources

	Management	Marketing	Signage	Infrastructure	Notes
Foundations	X	X	X		A variety of foundations, each have different funding priorities and budgets.
Private donors and endowments					Numerous opportunities, charitable status required
Ministry of Tourism, Culture and Sport, Celebrate Ontario www.ontario.ca or HERE direct.	X				Event funding only, maybe applicable for launch event and multi-year event programming
Northern Heritage Fund Ontario Ministry of Northern Development and Mines www.ontario.ca or HERE direct.					5 programs funding streams. Eligibility requirements may be challenging to meet for development of GBCyR but should be reviewed again.
Healthy Communities Fund Ontario Ministry of Health and Long Term Care www.ontario.ca or HERE direct					For projects that deliver integrated health promotion initiatives in communities and province wide. Funding application guidelines not posted at this time.
Various programs offered in past including Great Lakes project funding and Community Go Green Fund Ontario Ministry of Environment www.ontario.ca					Information on these programs not accessible at this time. Funding program streams may be under review
Economic Action Plan Government of Canada www.actionplan.gc.ca				X	A variety of program streams, may be possible in conjunction with a municipality
Canadian Futures Development Corporations (CFDC's)		X			Project funding for local area initiatives
Green Municipal Fund Federation of Canadian Municipalities www.fcm.ca or HERE direct.				X	Targeting municipalities, may be eligible under municipal partners and transportation stream
Trans Canada Trail Foundation				X	Funds may be available for projects on trail

X funding would cover this stage of implementation

? funding may cover this stage of implementation

Blank - Unknown at this time

Phase 3 – Implementation

Stage 3.1 Project Management

After the transition from the Steering Committee to the new governing organization takes place, the new organization will be solely responsible for GBCyR project management, including developing a detailed implementation and work plan, plus determining the roles and responsibilities of other organizations, partners,

staff, consultants and volunteers. The Cost Assessment (Appendix C) allowed full time experienced staff person to be hired, which depending on experience level, pay scale and funding budget, could be augmented by a part-time project coordinator providing further assistance. During the early stages of implementation it would be cost-effective for staff to be located in the Georgian Bay region. The key project management steps are described below.

Step 3.1.1 Solidify Relationships with Partners

At the outset, it will be essential for the new organization to solidify relationships with all organizations having jurisdiction over the roads and trails of GBCyR route: municipalities, First Nations and MTO. Those that provided support for the project should be asked for approval to route GBCyR down their roads and trails.⁵ They should also be asked for a formal commitment to resource installation of supplied route signs along the portion of the route under their jurisdiction, the letters of support received to date will be of assistance in proceeding with this task, however do not constitute formal approval. This process will be lengthy because requests and supporting documentation has to be sent to staff, councils and/or appropriate committees for approval.

Step 3.1.2 Oversee Signage Program

The new organization will be responsible for developing and implementing the signage program, described in Stage 3.3. Project management experience related to signage development and installation and staff coordination skills will be essential to facilitate the complexities that will arise when working with over 35 different jurisdictions. Developing excellent communication channels and maintaining ongoing relationships with local and regional staff will result in success.

Step 3.1.3 Oversee Marketing Program

The new organization will oversee all aspects of marketing the GBCyR. It should ensure that the marketing strategy (Stage 3.2) and marketing budget align as funding is attained, continually realigning as the project unfolds. A detailed marketing plan should be created for each marketing step: brand identity, mapping, website, cards and brochures, advertising and promotions, any launch events and other marketing related route development promotional activities. If there is a significant time lapse between completion of this report and commencement of marketing activities, the marketing program steps should be re-examined to ensure they remain a good fit with technology as well as with consumer and industry demand. It will also be the responsibility of the new organization to stay up to date with current market research, tourism and economic benefit tracking in participating regions.

Step 3.1.4 Sustain the Route (relationships, signage, marketing)

After the GBCyR is launched, the governing organization will continue to sustain the route into the future. It will be responsible for:

- Maintaining good relationships with the organizations that have jurisdiction over the roads and trails comprising the route
- Ongoing sign placement and replacement,
- Route re-alignment as new cycling infrastructure is built.

⁵ The list of municipalities and other organizations contacted during this feasibility study is provided in Appendix B, along with an indication of those providing letters of support for the project.

- Future marketing campaigns in co-operation with destination management/marketing organizations and cycling organizations

Stage 3.2 Marketing

The new governing organization will be responsible for developing and implementing the GBCyR marketing strategy. The steps outlined below are in sequential order but there will be with some overlap. Timelines should be developed by the new organization and will need to align with funding commitments and timing (Table 2).

Step 3.2.1 Establish Brand Identity

A visual brand identity should be established before any marketing activity begins, including sign design. Depending on which organization becomes responsible for governance, this could be a lengthy and expensive process involving a professional communications firm or could be done in house relatively quickly by making minor modifications to a pre-existing brand.

After the brand is established and as the route is implemented, the brand identity should be shared with all stakeholders, along with guidelines for use on printed and electronic collateral. Standard, consistent communication and marketing materials should be developed to inform residents and visitors about the GBCyR.

Step 3.2.2 Map the Route

The governing organization should ensure that the entire route is travelled by vehicle to verify the route details on the ground and to provide input to the signage audit (Step 3.3.1). The updated route maps should be reviewed with municipal and regional partners. Maintaining and updating a route map in a digital format for internal use and to collect supporting information, along with print copies of mapping information, to be submitted to map designer to prepare the print rendition is important. The map designer should be selected via tendered contract or with substantiated reasoning from the governing organization.

Small scale printable PDF maps and scalable digital maps have been recommended and costed for GBCyR route mapping (Appendix C). If there is a significant time lapse between implementation plan submission and commencement of marketing activities, these mapping recommendations should be re-examined to ensure they remain a good fit with technology, as well as consumer expectations and project budget.

Mapping priorities and recommendations:

- Only the implementation-ready route should be included in the first edition maps. Route B's should be included as part of implementation-ready route. The potential to close the gap between Sudbury and Parry Sound can be noted on the route overview map.
- Caution notes and symbols should be used to flag challenging and/or unsafe conditions.
- Full visitor service communities and limited visitor services communities should be noted by symbol and explanation. Full service communities include: accommodations, food store, banking, medical offices or hospital. Limited service communities do not have all of the previously mentioned services.
- An electronic listing of businesses certified as bicycle-friendly by the Ontario By Bike Network and their location should be included. Mapping of other private services and accommodations is not

recommended because it would be difficult and expensive to keep information current as businesses change.

- Key tourist attractions, visitor information centers and major transit hubs that are located within a limited distance of established route, and fit within scale of map, should be included on the route maps. Those that do not fit within scale of map and are easy to reference with arrows can be included at discretion on governing organization and map designer.
- In areas where there are long stretches of no to very limited services, gas stations and other services and amenities may be listed at the discretion of the governing organization and map designer.
- The map scale should be established in conjunction with the map designer. It may differ along the route based on the difficulty of navigating through different sections.
- Additional relevant community and visitor information should be recorded and included on route website and specific web pages dedicated to regional maps and providing additional information.
- Municipalities and regional partners should be asked to verify and/or provide information, (address and where possible, GIS coordinates) for the following points of interest, which at the discretion of governing organization and map designers, will become symbol location points on maps: hospitals, attractions (with name), beaches, campgrounds, information centres, scenic lookouts, marinas, parking locations, washrooms, conservation areas, provincial and national parks. Maps should also reflect rural versus urban areas, parkland and natural areas by shading.

Once mapping is complete, other types of map-related marketing products, including 'route cards' and other trip planning resources, can be evaluated in relation to budget.

Step 3.2.3 Website

Website format, development and content should be determined by the new organization based on project budget and current technologies. As new applicable technologies and programs emerge, they should be evaluated for relevancy to project.

In the early stages of implementation, the website should focus on the needs of partners and stakeholders. As the route becomes market-ready, the website should convert to a format that is well-designed and easily navigable for the consumer, prospective route users and cyclists, to find information on: exact routing and supporting communities; attractions; events; tourism information, businesses and services on and near the route.

Along with website development and ongoing content management, relevant social media should be incorporated to represent and promote the route.

Step 3.2.4 Printed Marketing Collateral

Once the route is market-ready, a professional designer should be retained to prepare a two sided full colour 'rack card' as the promotional lure piece for the GBCyR. This attractive, printed card will build awareness of the route and drive cyclists to the website for more information.

A regional distribution plan should be prepared to assist with planning for print quantities and establishing distribution channels. The rack card should be available for distribution prior to route launch as it will be the primary marketing collateral to build excitement and exposure for new route.

Step 3.2.5 Advertising and Promotion

Additional advertising and promotional initiatives should be evaluated in the context of marketing budget established through GBCyR project funding agreements.

- Ongoing participation at the Ontario and Quebec bicycle consumer shows should be the primary consideration, with attendance at other outdoor adventure shows as budget permits.
- Paid advertising in targeted magazines and other print media and online advertising opportunities should be evaluated at time of launch to select best options within budget parameters.
- A media outreach campaign should be part of GBCyR Route launch events (Step 3.2.8), maximizing the potential for media exposure and public relations.
- Participation in Familiarization (FAM) Tours organized by destination marketing organizations, Regional Tourism Organizations and Ontario Tourism Marketing Partnership would provide excellent exposure to existing and potential tourism industry partners.

Step 3.2.6 Test Ride Route

Approximately 12 months before route launch, an end-to-end pilot test ride should be held inviting community partners and champions, funders, local, provincial representatives and cycling experts. The coordination of test ride will require significant staff time to create day to day itineraries, organize travel logistics, prepare information, invitation and complete outreach.

The test rides should be broken into daily itineraries that will effectively test the maps, provide a mobile workshop platform, unveil the signage program and build further support for final stages of route development and launch. The test rides will provide project staff with invaluable feedback on final route verification as well as participant comments and perspectives that will assist with developing marketing materials. Test rides could assist with initial route marketing if media guests are invited.

Step 3.2.7 Ontario by Bike Network and Workshops

The Ontario By Bike (formerly Welcome Cyclists) Network (OBB) and workshop series effectively engage tourism stakeholders in the cycle tourism sector and help them reach this growing market. The workshops have also been useful in providing information to a full range of stakeholders and preparing them for the launch of new cycling routes in a number of regions across Ontario. The information provided to consumers / cyclists by OBB is invaluable and a well-used resource for trip planning and cycling in Ontario.

At the time of writing, three regions along the GBCyR were participating in the OBB (launch/workshop date in brackets): Manitoulin District (October 2011), Grey County (October 2012) and Simcoe County (May and December 2013). As a result there are certified bicycle-friendly tourism businesses and locations along portions of the GBCyR.

Tourism stakeholders along the route would benefit from being part of the OBB, and the workshop series would be a good venue to introduce them to the GBCyR while learning to be bicycle-friendly. Workshops should be held in regions along the GBCyR that have yet to participate in the Network: Bruce County, Sudbury District, City of Greater Sudbury, Parry Sound District and Township of Georgian Bay (Muskoka District). The three participating regions should also consider OBB workshops to introduce GBCyR to existing participants and to attract new participants. The workshops should be completed 6 months or more prior to route launch to ensure that businesses are bicycle-friendly when the GBCyR marketing campaign begins.

Step 3.2.8 GBCyR Launch Event

To officially launch route and capitalize on marketing related benefits, a launch date and event(s) should be coordinated by the project team. The event(s) could be as elaborate or as basic as budget and staff resources permit. For example:

- One or multiple 'trail head' ribbon cutting ceremonies would entail staff coordination and basic promotion, but few resources,
- A multi-day touring event open to the public would provide increased exposure and promotion of new route launch, but also require significant staff time to coordinate and a substantial marketing budget to ensure the event is successful. An event of this type is recommended and has been included in route development budget.

Step 3.2.9 Tracking to Measure Tourism and Economic Benefits

Market research would be invaluable to measure the tourism and economic benefits of the GBCyR. This information would be useful to garner more community and business support, to secure and maintain funding relationships and sponsors, and to measure the success of GBCyR marketing initiatives. It is important to begin capturing data early and to continue monitoring on an on-going basis. Pre-launch or early market research would act as a benchmark, and it should be continued as a longitudinal study every other year to ensure tracking from route launch onward. A private market research consulting firm with cycle tourism experience or a recognized educational institution should be engaged to develop an independent tracking system at least 6 months prior to route launch.

Stage 3.3 Signage Development and Installation

There are a number of important factors to consider when signing a route that the new governing organization will have to make final decisions on based on signage budget, design, installation plans and partners.

The following considerations should be incorporated into decision making:

- Bi-directional signage is required to enable way-finding from both directions.
- Bike routes often take different less direct routes than motorized routes to incorporate low traffic speeds, volumes and most scenic routing, thus requiring additional and more frequent signs than general use for motorized vehicles.
- Cyclists travel shorter distances and at lower speeds than motorized users and often need confirmation with regards to next destinations, amenities, connections, direction, distances and timing.

- Advance signage for roadway crossings and routing less safe for cyclists enhances route safety and experience. Share the Road signs highlight to motorists that cyclists may be present on route.
- Signs need to be at a level that is easy for cyclists to read when passing.
- Signs need to be consistent in design and placement across route in order to be effective. Sign design should be simple yet easy to read with easily recognizable identifying features including route name or logo.
- Consideration needs to be given when shared routing as too many signs on one route could confuse trail user and make sign pollution.

Step 3.3.1 Signage Audit

A detailed signage strategy and full signage audit is required to identify signage requirements. To complete the audit, project staff and an assistant would need to travel route in entirety with a digital mapping system on hand to mark where the signs are required. The audit, when complete, will identify the number of signs required for printing. The results need to be in digital format with GIS coordinates included and made readily available to municipality and/or regions that will then install signs. An audit of this scale is labour intensive, detailed work that requires precision and accuracy in reporting.

The signage audit should include:

- Confirmation signs – Recommended to be installed every 2.5km from both directions.
- Directional signs – Route should be signed from both directions, and signs installed at each turn / decision point

While not primary signage, some consideration should also be given to locations for safety signs (e.g. Share the Road) and trailhead signs, both of which would be further evaluated in conjunction with the municipalities and regions and based on funding.

It is recommended that primary standard signs be 450 mm x 450 mm (18 inches) with directional arrows as attachments below the route signs at all major decision points. For confirmation signage, including small signs, blazes and flashings, the standard should be 155mm (6 inches) in diameter.⁶

Step 3.3.2 Design Service, Sign Fabrication and Printing

The governing organization should incorporate the work completed in the brand identity exercise and work with a sign designer to develop a sign template with alternate sizes of signs included. The common specs for sign fabrication are 14 gage (0.064") aluminum with full-colour printing on reflective vinyl adhesive. This type of sign has a life-span of approximately 10 years. It is recommended that sign fabrication order be put to tender to receive the most competitive pricing.

⁶ <http://www.waterfronttrail.org/partner-resource-center/publications> Waterfront Regeneration Trust, Design, Signage and Maintenance Guidelines: Waterfront Trail 2007 Update, Prepared by Marshall Maclin Monaghan.

Step 3.3.3 Sign Installation

In accordance with municipal and regional approvals, the signs should be installed by the jurisdiction that owns the roadways or trails where they are to be installed. GBCyR project staff will have to work closely with municipal and/or regional staff, sharing signage audit and all related information. Prior to installation, the jurisdiction is likely to have its own staff repeat the signage audit to verify locations.

Locates have to be completed before sign posts can be put in the ground to provide assurance for installers that site selected has no underground wires or pipes that could affect installation and long term placement. As part of the approval agreements, the jurisdictions should be responsible for this component of installation. Some municipalities have departments capable of providing this service.

Step 3.3.4 Annual Inspection and Sign Replacement

Ideally, signs should be checked annually. Signs can require maintenance due to a number of reasons including but not limited to weather and vandalism. Depending on fabrication materials, signs generally need reprinting and replacing every 10 years.

Stage 3.4 Infrastructure⁷

Step 3.4.1 Implementation-ready Route

The 800 km implementation-ready part of the route, from Parry Sound south around Georgian Bay to Sudbury, requires no immediate infrastructure improvements because it makes use of existing infrastructure, a combination of existing roadways, bike routes and multi-use trails. Some municipal and provincial roads included in this routing have scheduled roadwork projects that will improve the route's suitability for cyclists. In other cases, developing the GBCyR may help prioritize short and long term roadwork road works and transportation plans to improve cycling infrastructure.

As time moves forward, the currently recommended route may need to be realigned as a result of changing circumstances. New off-road pathways may be developed or road construction projects may improve or compromise the existing route. Thus, it is essential for the new governing organization to nurture good communications with key municipal, regional and provincial contacts and keep information regarding roads and trails flowing in both directions.

At the time of writing, there are still two areas of concern along the 800 km implementation-ready route:

- **Spanish River** – Routing along this area of Highway (Hwy) 17, east of Espanola between Jacklin Road and Old Nairn Road, is a potentially dangerous stretch for cyclists: a provincial highway with limited to no paved shoulders, high traffic volumes and speeds suitable only for experienced cyclists. Road, trail options or highway improvements are not scheduled for the near future, thus the GBCyR must follow Hwy 17 for 7 km. Where Hwy 17 crosses the Spanish River, the bridge is

⁷ Refer to Map 1 for an overview map and Appendix A for more detailed maps.

narrow and potentially dangerous for cyclists. Bridge reconstruction that could potentially accommodate cycling is not planned within the next 20 years.⁸ Therefore, appropriate information and cautionary notes must be included on all published GBCyR route materials for this section.

- **City of Greater Sudbury** - The final routing through the City of Greater Sudbury to a suitable start/finish point has not been finalized. At the time of writing, Sudbury's active transportation plan was being prepared and could include significant trail and road infrastructure projects. Further meetings with City staff are needed to identify a route that will align with the outcomes of these initiatives when they are complete.

For both of these concerns, it is important to consider the Lake Huron North Channel Cycling Route (LHNCCR), from Sault Ste. Marie to Sudbury, which is currently in implementation phase. As a high priority, the new GBCyR governing organization should work closely with the LHNCCR team and City of Greater Sudbury staff to develop a common route from Espanola to Sudbury. A joint route with a shared start/finish point in the Sudbury city centre would increase support for both routes, reduce route implementation costs and ensure that the route is clearly marked for cyclists. In addition, it would be beneficial to cooperate on monitoring provincial roadwork schedules and considerations regarding safety in the Spanish River area.

Step 3.4.2 Route Gaps

The GBCyR has the potential to be approximately 1,000 km long. As noted previously, 200 km are not deemed 'implementation-ready' because infrastructure gaps resulting from the Highway 69 four-lane project have made, or will make, cycling impossible. Proceeding with the 800 km implementation-ready route, leaving the route closed between Sudbury and Parry Sound, will ensure that cyclists have start and finish points in accessible, fully serviced communities. Establishing a cycle route through the gap areas could take a number of years to resolve.

The Ministry of Transportation (MTO) is currently focused on completing the Highway 69 four-lane project between Parry Sound and Sudbury. Cycling is/was possible, although dangerous, along the two-lane Highway 69. Since the four-lane project plans do not include continuous cycling infrastructure, accommodations must be made for cyclists during road construction. In some sections, service roads have been/will be built, and these provide/will provide suitable routes for experienced and touring cyclists. However, there are two gaps, as described below. The Steering Committee's decision to initiate meetings with the Ministry of Transportation to investigate opportunities for a separated safe cycle route through this section will require a long-range outlook, patience and perseverance, as it will be a number of years before this road construction project is complete.

⁸ Jason Ranger, Senior Project Engineer, Planning and Design Section, Northeastern Region, MTO Provincial Highways Management Division, telephone conversation March 20, 2014.

- **South Gap (7 km)** – When construction of this section of the four-lane Highway 69 project is complete, there will be a 7 km gap without a service road between the Pickerel River Road and Highway 522 interchanges. This section of the four-lane project is in the last stages of detailed design in preparation for construction. MTO regional staff noted that this is very late in the process to request infrastructure changes because the public consultation and environmental assessment are complete. In addition, significant design changes would be required to accommodate cycling infrastructure that would delay construction. Any delay or changes at this point would require discussion with MTO senior management.

As implementation moves forward, the new governing organization will become responsible for resolving this gap. A solution should be developed by working collaboratively with MTO and regional stakeholders.

- **North Gap (40 km)** – South of Sudbury the only connection between Estaire and Alban is the newly completed four-lane Highway 69, which cannot be used by cyclists. Between these communities, there are no continuous service roads, municipal roads or multi-use trails. This means there is no longer bicycle access to Highway 637 and Killarney Provincial Park.

The new governing organization will be responsible determining how to best resolve this gap. A solution should be developed by working collaboratively with MTO and regional stakeholders. Alternative routing (such as the Highway 17, 535, 64, 607) should be considered, as roadwork projects continue to improve infrastructure for cyclists.

2.2 Implementation Timeline

A broad timeline for implementation of the phases, stages and steps described above are presented in the following table.

Table 2
Implementation Timeline

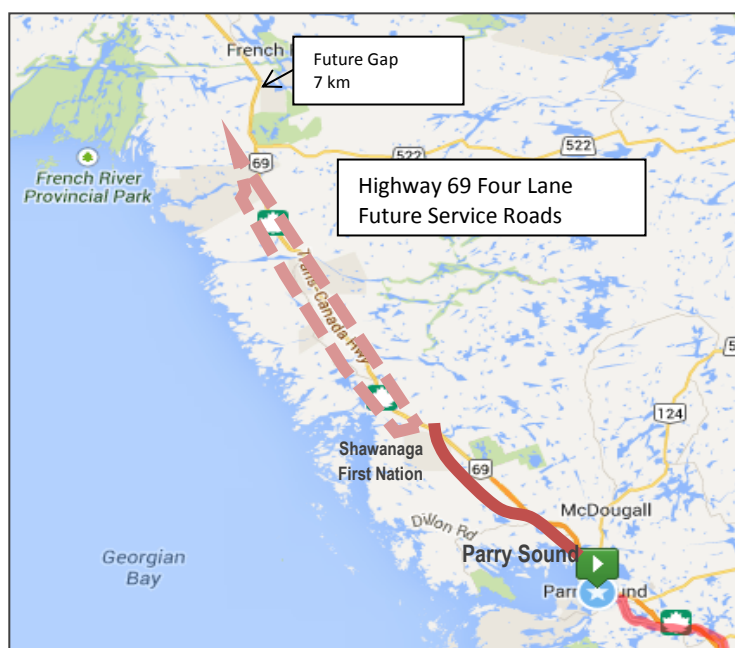
Stage	Step		Year				
			1	2	3	4	5
Phase 1 - Transition							
1.1	Strike a Transition Subcommittee						
1.2	Discussions with the New Governing Organization						
1.3	Continue Stakeholder Engagement						
1.4	Continue Liaison with LHNCCR and MTO						
1.5	Transfer Responsibilities to New Governing Organization						
1.6	Steering Committee Dissolves						
Phase 2 – Preparing for Implementation							
2.1	Establish GBCyR as Mandated Project						
2.2	Funding Applications						
Phase 3 - Implementation							
3.1	Project Management						
	3.1.1	Solidify Partner Relationships	X	X	X		
	3.1.2	Oversee Signage Program	X	X	X	X	X

Table 2
Implementation Timeline

Stage	Step		Year				
			1	2	3	4	5
	3.1.3	Oversee Marketing Program	X	X	X	X	X
	3.1.4	Sustain the Route				X	X
3.2	Marketing Strategy						
	3.2.1	Establish Brand Identify	X	X			
	3.2.2	Map the Route		X	X		
	3.2.3	Website		X	X	X	X
	3.2.4	Printed Marketing Collateral			X	X	X
	3.2.5	Advertising and Promotion			X	X	X
	3.2.6	Ontario by Bike Network and Workshops			X	X	X
	3.2.7	GBCyR Launch Event				X	
	3.2.8	Tracking to Measure Tourism & Economic Benefits			X	X	X
3.3	Signage Development and Installation						
	3.3.1	Signage Audit		X			
	3.3.2	Design Services		X			
	3.3.3	Sign Installation			X	X	X
	3.3.4	Annual Inspection and Sign Replacement					X
3.4	Infrastructure						
	3.4.1	Implementation-ready Route					
	3.4.2	Route Gaps	X	X	X	X	X

Appendix A Route Maps and Community Assessments

Parry Sound District



The Route

- The Route is approximately 114 km long within Parry Sound District.
- Municipal roads and provincial highways currently suitable for experienced and touring cyclists.
- Paved shoulders on Nobel Road from Parry Sound to Hwy 559 intersection.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT WITHIN PARRY SOUND DISTRICT, EXCEPT AS IT RELATES TO THE HIGHWAY 69 FOUR-LANE PROJECT.

NOTE: Highway 69 four-lane construction is scheduled to begin north of Parry Sound in 2016. During construction cyclists will be able to travel through the construction zone only in areas where public vehicle traffic is permitted (as provided and maintained by the contractor). Cycling will not be permitted on the new four-lane highway. Cycling will be possible on the new service road, except for an approximate 7-km gap between the new Pickerel Lake interchange and new Highway 522 interchange. Resolution of this gap will follow a meeting between the new governing organization and the Minister of MTO.

Road and Trail Jurisdictions

Province of Ontario	Hwy 7182 through Township of Archipelago (North Portion) and Shawanaga First Nation Hwy 69 through Township of Wallbridge and Henvey Township Hwy 529 through Henvey Township
Seguin Township	Rankin Lake Road, Oastler Pk Dr, Lake Joseph Rd
Town of Parry Sound	Parry Sound Dr., William St., Cascade St., River St.
McDougall Township	Nobel Rd, Parry Sound Drive
Township of Carling	Nobel Rd

Parry Sound District, continued

Improves Tourism Experiences

- GBCyR will provide a safe, designated cycling route for experienced, road touring cyclists travelling within or through the District and the City of Parry Sound.
- GBCyR aligns with the goals of the Parry Sound Active Transportation and Trails Strategy.
- GBCyR brings visitors into downtown Parry Sound to take advantage of accommodations, restaurants, art and cultural facilities and visitor services.
- GBCyR will expand experiences for visitors staying in hotels, bed and breakfasts, cottages throughout the region, as well as those camping at the Provincial Parks (Sturgeon Bay, Grundy Lake, Killbear, Oastler Lake, The Massassaga) and other campgrounds.
- Visitors coming to the Grundy Lake PP by Park Bus (www.parkbus.ca) with bicycles (limited number accommodated) will have the opportunity to explore more of the region on the GBCyR.
- GBCyR links with regional and community trails to enhance trail experiences for residents and visitors
 - South of Parry Sound, connects to the Seguin Trail (part of the Park to Park Trail, an off-road trail from Parry Sound to Algonquin Park, not suitable for road bikes),
 - Connects to the 6.5 km long Parry Sound Waterfront Fitness trail (suitable for recreational cyclists),
 - By private boat or water taxi, connects to Georgian Bay Islands biking trails,
 - Nearby biking trails in Grundy Lake and Oastler Provincial Parks.

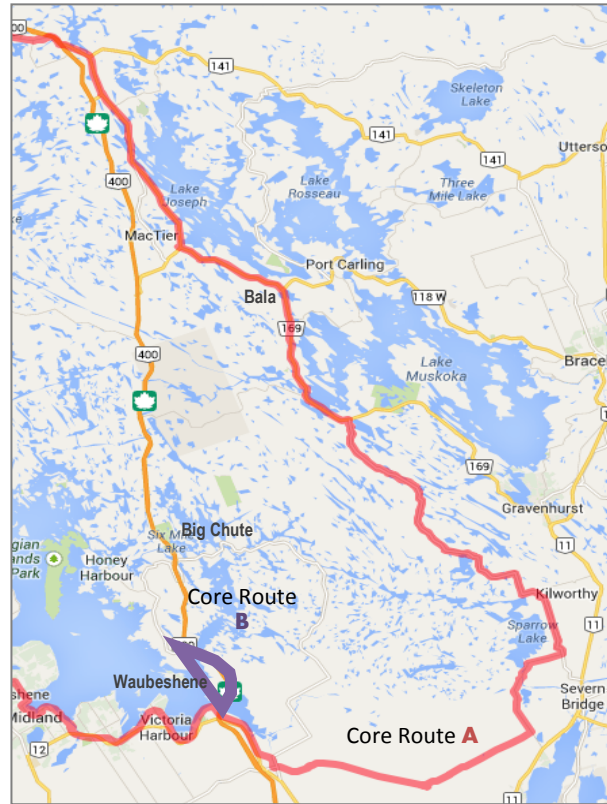
Increases Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to Parry Sound District.
- The slower pace of cycling (as opposed to auto) means visitors tend to stay longer when travelling through the area or even if riding portions of the route.
- Visitation and spending for accommodation, nutritious meals, bicycle services and guided tours would increase at Parry Sound, the major regional centre and at smaller service nodes such as Nobel, Britt, Byng Inlet, Shebeshekong Road and Point au Baril.
- Spending would increase for tourist attractions such as: Bobby Orr Museum and boat cruises, air flight, kayak or power boat excursions to the 30,000 Islands, the world's largest freshwater archipelago and a UNESCO World Biosphere Reserve (www.gbbr.ca).

Tourism Investment Opportunities

- With increased visitation and a focus on cycling, new business opportunities would be expected
 - Restaurants serving light, nutritious meals at service centres,
 - Bed and breakfast, small unique inns close to the route with views of Georgian Bay,
 - Bike repair and service shops in rural areas along the route,
 - Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions,
 - Cycling festival/events within communities could garner higher participation because of association with high profile GBCyR.

District of Muskoka



The Route

- Two routes are recommended for the District of Muskoka.
 - Using Core Route A, the route is approximately 84 km long.
 - Using Core Route B, the route is approximately 146 km long.
- Core Route A & B both follow municipal roads and the Lake Joseph Road has paved shoulders.
- Roads currently suitable for experienced and touring cyclists.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN THE DISTRICT OF MUSKOKA.

Road and Trail Jurisdictions

District of Muskoka	<p>Through Township of Muskoka Lakes follows</p> <ul style="list-style-type: none"> Lake Joseph Rd MD Rd 169 (Foots Bay to Torrance) MD Road 13 (Southwood Road) MD Road 49 (Canning Road) <p>Through Township of Georgian Bay (Core Route B) follows the following District of Muskoka Roads</p> <ul style="list-style-type: none"> Quarry Rd Hwy 400 Service Rd Port Severn Rd Honey Harbour Rd White's Falls Rd Upper Big Chute Rd
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District of Muskoka, continued

Improves Tourism Experiences

- GBCyR will provide a safe, designated route for experienced, road touring cyclists travelling within or through the District of Muskoka.
- GBCyR aligns with the goals of the Muskoka District Active Transportation Strategy to increase and improve cycling experiences for residents and visitors.
- GBCyR will bring cyclists close to MacTier, Bala, Honey Harbour and Port Severn for services and accommodation, and to bed and breakfasts, inns, campground and cottage accommodations along the route.
- In the Township of Georgian Bay, cyclists will have access to Honey Harbour and Port Severn for services and accommodation, and there are some service opportunities along the route as well.
- GBCyR will expand experiences for visitors staying in hotels, bed and breakfasts and cottages through the region, as well as those camping at Georgian Bay Islands National Park and Six Mile Lake Provincial Park.
- GBCyR complements the cycling experience being developed at Georgian Bay Islands National Park - mountain bike rentals and day visitors can bring bikes to Beausoleil Island by water taxi.

Tourism Visitation and Spending

- Cycling infrastructure is growing rapidly in Muskoka, for residents, seasonal residents and visitors.
- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to the District of Muskoka; to date the District has focused cycling efforts on Lake Joseph Road.
- GBCyR aligns with Georgian Bay Twp efforts to promote cycle tourism link tourism attractions along the Georgian Bay shore.
- The slower pace of cycling (as opposed to auto) means visitors tend to stay longer when travelling through the area or even if riding portions of the route.
- Visitation and spending for accommodation, nutritious meals, bicycle services and guided tours would increase at the service nodes – MacTier, Bala, Honey Harbour and Port Severn.
- Visitation would increase for attractions such as Georgian Bay Islands National Park, Six Mile Lake Provincial Park, and Big Chute Marine Railway (National Historic Site) & Torrance Barrens Conservation Reserve & Dark Sky Preserve.

Tourism Investment Opportunities

- With increased visitation and a focus on cycling, new business opportunities would be expected
 - Restaurants or cafes serving light, nutritious meals at service centres,
 - Bed and breakfasts and small unique inns close to the route with views of Georgian Bay,
 - Bike repair and service shops in service centres,
 - Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions, and
 - Cycling festivals/events in the region could garner higher participations because of association with high profile GBCyR.

Simcoe County



The Route

- The Route is approximately 126 km long in this area.
- Includes 8 existing trails (some screening, some paved) suitable for recreational cyclists.
- Municipal roads currently suitable for experienced and touring cyclists.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN SIMCOE COUNTY.
- Beachwood Road (old Hwy 26) is very busy, and the Town of Collingwood is considering paved shoulders, which would make this short stretch safer for cyclists.
- Future link to Allandale GO Station on existing paved and unpaved trails, suitable for recreational cyclists.

Road and Trail Jurisdictions

Province of Ontario	Not on any Provincial Highways
Simcoe County	Not on any County Roads
Township of Severn	Peninsula Point Road, South Sparrow Lake Road, Cambrian Road, Burnside Line, Foxmead Rd, Anderson Line, Southern Road Coldwater Road), Sturgeon Bay Road, Uthhoff Trail Extension
Tay Township	Uthhoff Trail Extension, Tay Shore Trail
Town of Midland	Midland Waterfront Trail, Marina Park Ave, Sunside Trail Extension, Mid Pen Link
Town of Penetanguishene	Fuller Ave, Robert St. E, Fox St. Brock St., Penetang Waterfront Trail, Penetang Trail
Tiny Township	Tiny Trail, Concession 8 East, Tiny Beaches Rd
Town of Wasaga Beach	River Road, Mosley St, Shore Lane Rd
Clearview	Fairgrounds Rd, Con 33/34
Town of Collingwood	Beachwood Rd, Fairgrounds Rd, Train Trail/Georgian Trail

Simcoe County, continued

Improves Tourism Experiences

-GBCyR links numerous outdoor experiences and cultural attractions along the southern Georgian Bay shoreline. Cycling brings an active component to tourism in the area, takes visitors closer to the land and helps to them relate the history and environment of the area.

-GBCyR aligns well with the new bike rental and trail development program on Beausoleil Islands and enhances an accessible experience of visiting the UNESCO World Biosphere Reserve. Future access by boat taxi from Midland.

-Cycling from Balmy Beach through Wasaga Beach offers visitors a closer, slower, safer tour of the cottages and beaches on the east side of Georgian Bay. This would expand the tourism experiences for campers at Wasaga Beach and Awenda Provincial Parks and other campgrounds, as well as cottagers throughout the area.

-GBCyR would bring visitors into Collingwood, Wasaga Beach, Midland, Penetanguishene and Coldwater to take advantage of the numerous accommodations, restaurants, art and cultural facilities and visitor services.

- GBCyR connects to national, regional and community trails in Simcoe County and aligns with the goals of the Simcoe County Trails Plan to enhance trail experiences for residents and visitors.

- Follows *Trans Canada Trail* from Tiny Trail (south of Penetanguishene) to Tay Trail at Waubesaushene and Uthoff Trail, except in the Town of Penetanguishene where adjustments were made to make a safer cycling route.
- *Tiny Trail* links south to Minesing and Highway 90 west of Barrie
- *Uthoff Trail Extension* links to Orillia and links with the Ontario's Lake Country Oro-Medonte Rail Trail to Barrie and the Allandale GO Transit station.
- Tiny Trail and Uthoff Trail are in the process of being designated the *Pilgrimage Route* (A project of Martyr's Shrine and Simcoe County Trails)
- Follows designated bike route through Wasaga Beach
- Links to numerous bike trails in Wasaga Beach Provincial Park

Increases Tourism Visitation and Spending

-GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to Simcoe County.

-The slower pace of cycling (as opposed to auto) means visitors tend to stay longer when travelling through the area or even if riding portions of the route. Visitation would increase at clusters of services and attractions: Port Severn/ Georgian Bay Islands National Park, Midland & Penetanguishene, Wasaga Beach and Collingwood.

-Spending would increase for: tourism attractions such as Sainte Marie among the Hurons, Wye Marsh, Martyr's Shrine, Discovery Harbour, Nancy Island; guided cycle tours; light, nutritious meals at food and beverage establishments; bicycle service

-For some cyclists, smaller accommodations such as bed and breakfasts, small inns or even camping at Awenda or Wasaga Beach Provincial Park will meet their needs, for others, particularly larger cycling groups or clubs, larger accommodation such as branded hotels in Midland and Collingwood would benefit.

Tourism Investment Opportunities

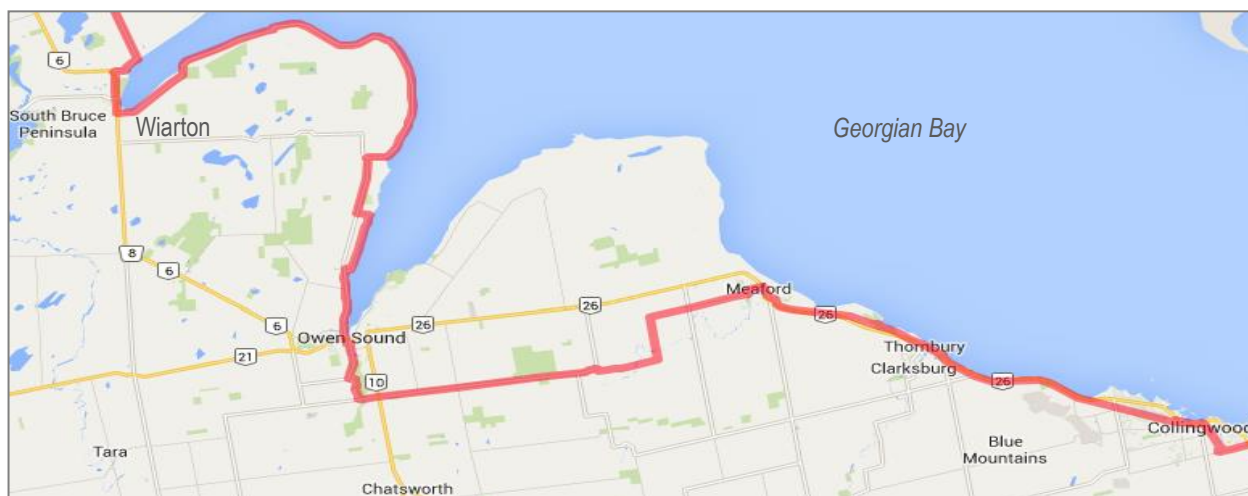
-This section of the GBCyR has the opportunity benefit quickly from cycling tourism because of the close proximity to prime Toronto and southwestern Ontario markets.

-There are already 29 certified bicycle-friendly tourism business and participating locations in Simcoe County as part of the Ontario By Bike Network, and if GBCyR proceeds, more will follow.

-With increased visitation and a focus on cycling new business opportunities would be expected:

- Coffee and tea speciality cafes,
- Bed and breakfast, small unique inns close to the route with views of Georgian Bay,
- Bike repair and service shops in gap areas along the route,
- Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions,
- Bike shuttle services from future Bike Train services with Go Transit in Barrie to accommodation or trailheads,
- Cycling events within communities could garner higher participation because of association with high profile GBCyR.

Grey County



The Route

- The route through Grey County is approximately 120 km.
- *Georgian Trail* suitable for recreational cyclists.
- Municipal roads currently suitable for experienced and touring cyclists.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN GREY COUNTY.

Road and Trail Jurisdictions

Grey County	Grey Roads 12 and 18 through Municipality of Meaford Grey Road 1 through Township of Georgian Bluffs ("Grey Scenic Route")
Town of the Blue Mountains	Georgian Trail
Municipality of Meaford	Georgian Trail Bayfield St., Nelson St., 11th Line, 10th Side Road, 9 th Side Road, Concession Road 1
City of Owen Sound	Inglis Falls Rd, 2nd Ave E, 8 th St. W, 2 nd Ave W, Eddie Sargent Pkwy, 3 rd Ave W

Improves Tourism Experiences

- GBCyR will provide a safe, designated cycling route for cyclists travelling within or through Grey County
- GBCyR aligns with the goals of the Grey County Active Transportation Plan.
- GBCyR will be another product that aligns with Grey County Tourism's strategy of developing cycling products and experiences to increase visitation and spending.
- GBCyR complements Blue Mountain's efforts to grow the green season with mountain biking on the escarpment and road cycling throughout the county, especially the exposure received through the Centurion Cycling Canada event.
- GBCyR will bring visitors into Blue Mountain Village, Thornbury, Meaford, and Owen Sound to take advantage of accommodation, restaurants, art and culture facilities and visitor services.
- GBCyR will expand experiences for visitors staying in hotels, numerous bed and breakfasts, motels, and cottages throughout the region, as well as those camping at Craighleith Provincial Park and other private campgrounds.

Grey County, continued

Improves Tourism Experiences, continued

- GBCyR provides access to and views of and from the Niagara Escarpment (UNESCO World Biosphere Reserve), including two waterfalls.
- GBCyR links with designated cycle routes and trails to enhance trail experiences for residents and visitors
 - Grey County Tourism designated road cycling routes that would provide a more challenging and interesting routes for road cyclists (including views of Georgian Bay from the escarpment),
 - Tom Thompson Trail between Meaford and Owen Sound (underway, but not complete),
 - Centurion Cycling Canada routes 100, 50, 25 mile courses.

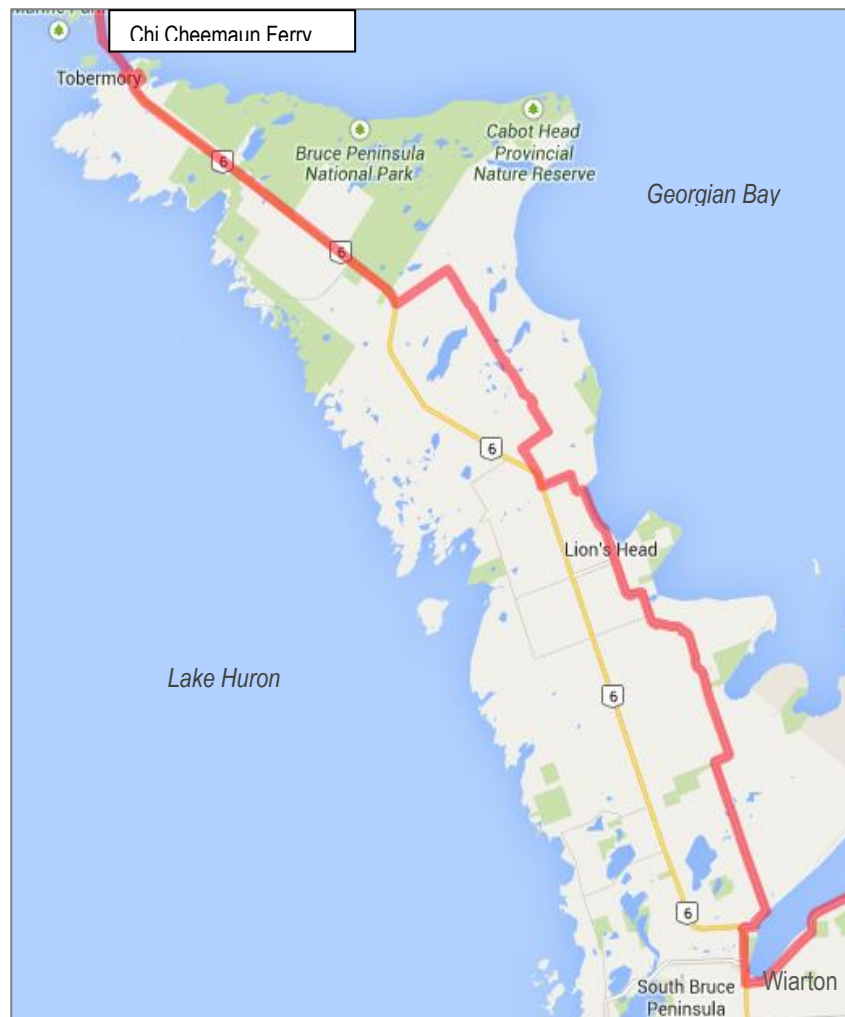
Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to Grey County.
- The slower pace of travel (as opposed to auto) means visitors would stay long when travelling through the area or riding portions of the route. Visitation would increase at clusters of services and attractions: Blue Mountain, Thornbury, Meaford and Owen Sound.
- Visitation and/or spending would increase for tourism attractions such as Grey Roots Museum, Apple Pie Trail, Blue Mountain Resort, Scandinave Spa and complementary tourism products that are being developed in Grey County: paddling, waterfalls, local food, rural gardens, art studios/gallery tours and wineries, cideries and micro-breweries.

Tourism Investment Opportunities

- The GBCyR will add more profile to the cycle products being actively developed in Grey County to service the Toronto and Southwestern Ontario markets.
- There are currently 39 certified bicycle-friendly tourism business and participating locations in Grey County that are part of the Ontario By Bike Network.
- With increased visitation and a focus on cycling, new business opportunities would be expected:
 - Coffee and tea speciality cafes,
 - B&B, small unique inns close to the route with views of Georgian Bay,
 - Bike repair and service shops,
 - Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions,
 - Cycling festivals/events within communities could garner higher participation because of association with high profile GBCyR.

Bruce County



The Route

- The route through Bruce County is approximately 89 km.
- Follows municipal roads and Provincial Highway 6 (with paved shoulders), currently suitable for experienced and touring cyclists.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN BRUCE COUNTY.

Road and Trail Jurisdictions

Province of Ontario	Hwy 6 through Township of Northern Bruce Peninsula
Bruce County	Bruce Roads 6 and 9 through Township of South Bruce Peninsula Bruce Road 9 through Township of Northern Bruce Peninsula
Township of South Bruce Peninsula	Frank Street (Wiarton)
Township of Northern Bruce Peninsula	Isthmus Bay Road, Caudle SR, Cherry Hill Rd, Lindsay Road 5, 1 East Rd Chi sin tib dek Rd, Head St, Bay St, Hwy 6, Front St (Tobermory)

Bruce County, continued

Improves Tourism Experiences

- GBCyR will provide a safe, designated cycling route for road touring travelling through and within Bruce County.
- GBCyR will bring visitors into Wiarton, Lion's Head and Tobermory to take advantage of accommodations, restaurants, arts/culture experiences and visitor services.
- GBCyR will bring visitors to Bruce Peninsula National Park and Fathom Five National Marine Park.
- GBCyR will expand experiences for visitors staying in hotels, bed and breakfasts, motels and cottages throughout the regions, as well as those staying in Bruce Peninsula National Park and other private campgrounds.
- Visitors coming to the Bruce Peninsula by ParkBus (www.parkbus.ca) with bicycles (limited number accommodated) will have the opportunity to explore more of the Bruce Peninsula.
- GBCyR provides access to and views of Niagara Escarpment (UNESCO world Biosphere Reserve).
- GBCyR links with national and regional cycling routes to enhance experiences for residents and visitors:
 - Cycle routes designated by Bruce County Tourism: Beaches North, Lighthouse Trail, Best of Bays Route,
 - Bicycle trails of Bruce Peninsula National Park,
 - Provides an alternative to busy Highway 6 for cyclists riding across Canada via the Bruce Peninsula.

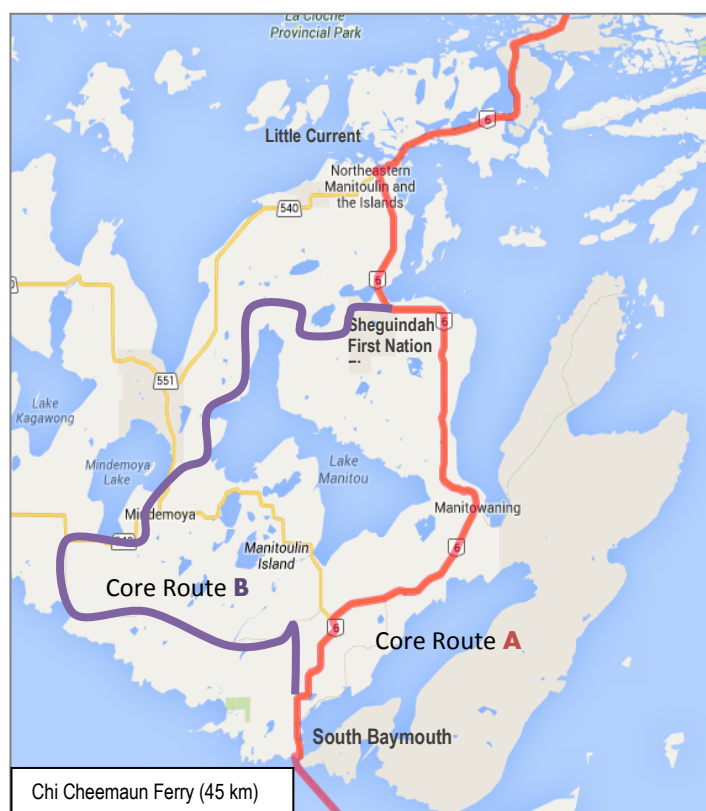
Increases Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to Bruce County.
- The slower pace of cycling (as opposed to auto) means visitors tend to stay longer when travelling through the area or even if riding portions of the route.
- Visitation and spending for accommodation, nutritious meals, bicycle services and guided tours would increase at service centres along the route: Wiarton, Lion's Head and Tobermory.
- Visitation and/or spending would increase for tourism products that are being developed in Bruce County: Bruce Peninsula dark sky preserve, hiking, paddling, caving, mountain biking, local food, rural gardens, art studios/gallery tours and lighthouse tours.
- More cyclists will use the Chi Cheemaun ferry to continue cycling from the Bruce Peninsula to Manitoulin Island, both as walk-on and drive-on-cyclists.

Tourism Investment Opportunities

- With increased visitation and a focus on cycling, new business opportunities would be expected:
 - Restaurants serving light, nutritious meals at service centres or other places along the route
 - Bed and breakfast, small unique inns close to the route with views of Georgian Bay,
 - Bike repair and service shops at service centres or other places along the route
 - Building services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions,
 - Community cycling festivals/events could garner higher participation because of association with the high profile GBCyR.

Manitoulin District



The Route

- Two routes are recommended for Manitoulin District:
 - Using Core Route A, the route through Manitoulin District is approximately 75 km long.
 - Using Core Route B (single loop), the route through Manitoulin District is approximately 83 km long.
- Core Route A follows provincial Highway 6, Core Route B follows provincial secondary roads and township roads.
- Highway 6 has paved shoulders and paved shoulders are planned for road 551 from Mindemoya to M'Chigeeng in 2015.
- Roads currently suitable for experienced and touring cyclists.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN MANITOULIN DISTRICT.

Road and Trail Jurisdictions (based on Core Routes A & B)

Province of Ontario	-Hwy 6 through Township of Tehkummah, Central Manitoulin Township, Assiginack, Whitefish Falls First Nation - Hwy 551 through Central Manitoulin Township - Hwy 542 through Central Manitoulin Township
Town of NEMI	Bidwell Road, Indian Mountain Road, Rockville Road
Township of Tehkummah	10 th Side Road, Government Road
Township of Central Manitoulin	Rockville Road
Township of Billings	Rockville Road
Sheguindah First Nation	Indian Mountain Road

Manitoulin District, continued

Improves Tourism Experiences

- GBCyR will provide a safe, designated cycling route for road touring cyclists travelling through and within Manitoulin District.
- GBCyR will bring cyclists to South Baymouth and Little Current to take advantage of accommodations, restaurants and visitor services, and cyclists will also have access to accommodations and services throughout the Island.
- GBCyR will expand experiences for visitors staying in resorts, lodges, bed and breakfasts, cottages, cabins and camping throughout the region.
- GBCyR links and follows the cycling routes developed by the Manitoulin Island Cycling Advocates

www.manitoulincycling.com

Increases Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to Manitoulin Island.
- The slower pace of cycling (as opposed to auto) means visitors tend to stay long when travelling throughout Manitoulin Island.
- Visitation and spending for accommodation, nutritious meals, bicycle services and guided tours would increase at South Baymouth and Little Current, as well as at small nodes that offer services throughout Manitoulin
- Visitation and spending would increase for tourist attractions, such as: Great Spirit Circle Trail / Canadian Tourism Commission Signature Experience), Misery Bay Provincial Park, Bridal Veil Falls, Cup and Saucer Trail and Providence Bay Beach.
- More cyclists will use the Chi Cheemaun ferry to continue cycling from the Bruce Peninsula to Manitoulin Island, both as walk-on and drive-on-cyclists.

Tourism Investment Opportunities

- This section of the GBCyR will quickly benefit from cycling tourism because so much effort is already being put into developing the cycling product for Manitoulin.
- There are currently 22 certified bicycle-friendly tourism business and participating locations in Manitoulin District a part of the Ontario By Bike Network and if GBCyR proceeds, more will follow.
- With increased visitation and a focus on cycling, new business opportunities would be expected:
 - Cafes serving healthy food and snacks for cyclists
 - B&B, small unique inns close to the route with views of Georgian Bay
 - Bike repair and service shops
 - Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservations and attraction admissions.
 - Cycling events, such as the Manitoulin Passage Ride will garner higher participation because the GBCyR has a higher profile.

District of Sudbury (West of the City of Greater Sudbury)



The Route

- The Route is approximately 57 km long in this area.
- Municipal roads currently suitable for experienced and touring cyclists, although cyclists must be aware of the dangers posed by very large trucks working in the resource sector.
- Highway 17 is very busy, with no paved shoulders and should only be used by cyclists who are very aware of the inherent dangers.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN THE WEST PORTION OF SUDBURY DISTRICT, EXCEPT AS IT RELATES TO HIGHWAY 17.

NOTE: The GBCyR Steering Committee was concerned about the safety of Highway 17 (7 km), including the bridge crossing the Spanish River. At present, Highway 17 is the only road through this area and it is the route identified for the Lake Huron North Shore Cycling Route. Resolution of the challenges faced by travelling along Highway 17 will follow a meeting between the new governing organization and the Minister of Transportation.

Road and Trail Jurisdictions

Province of Ontario	Hwy 6 through Township of Baldwin, Hwy 17 through Township of Nairn and Hyman
Town of Espanola	Centre St, Queensway Ave, Avery Drive, Gray St, Thornloe Ave, Tudhope St
Township of Baldwin	Jacklin Road
Township of Nairn and Hyman	Old Nairn Road, Minto St, MacIntyre St

District of Sudbury (West of the City of Greater Sudbury), continued

Improves Tourism Experiences

- GBCyR will provide a designated cycling route for experienced and touring cyclists travelling between Espanola and the City of Greater Sudbury
- GBCyR will bring cyclists into Espanola to take advantage of accommodation, restaurants and visitor services, and they have the opportunity to stop for services at Nairn Centre.
- GBCyR links with regional bike routes and trails to enhance experiences for visitors.
- Route used by cross-Canada cyclists following the Trans Canada Highway (Highway 17)

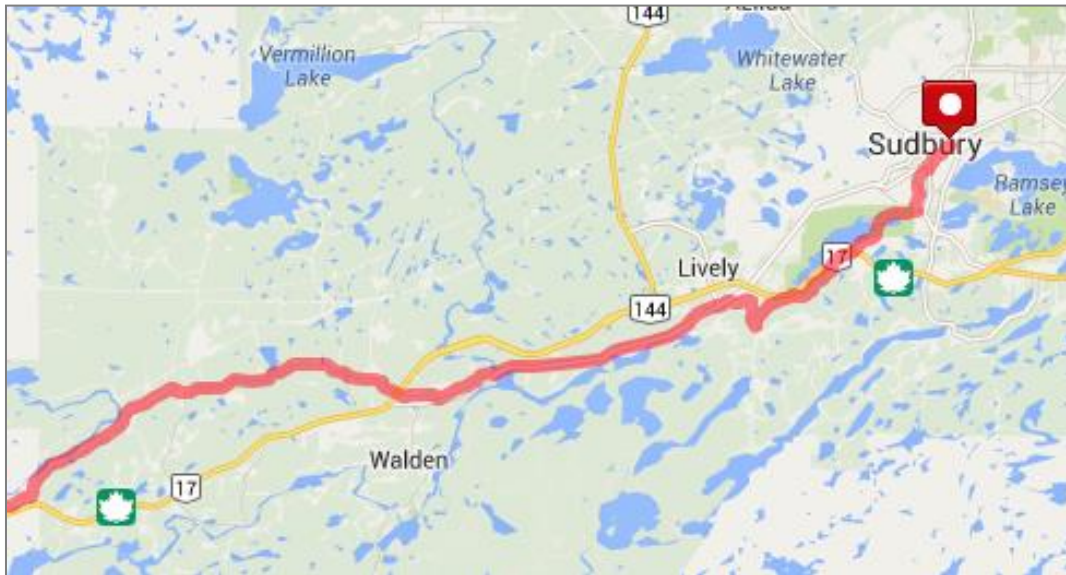
Increases Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to the west port of the District of Sudbury.
- Visitation and spending for accommodation, nutritious meals and bicycle services could increase Espanola and there could be increase spending for services in Nairn Centre.
- Cyclists' length of stay in the area could increase if they chose to: access to the west side Killarney Provincial Park through Widgawa Rd or hike the LaCloche Mountains on the Silhouette Trail or Heavens Gate Trail.
- Increased use of LaCloche Mountains as training ground for racing cyclists.

Tourism Investment Opportunities

- Existing businesses that provide accommodation, food and services should initially consider positioning and marketing to cyclists using the GBCyR because this portion of the route is relatively remote and would generally be used by and more attractive to very experienced cyclists who would travel through the area within a day.
- It will take time before GBCyR attracts large numbers of cyclists to warrant significant tourism investment in this area.
- Cycle transportation business around the Spanish River caution area

City of Greater Sudbury



The Route

- The Route is approximately 92 km long within the City of Greater Sudbury, 57 km west of downtown and 35 km south of downtown
- Municipal roads suitable for experienced and touring cyclists, trails are suitable for recreational cyclists
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN THE CITY OF GREATER SUDBURY.

NOTES:

1. Through route into Sudbury downtown from the west will depend on the outcome of discussions between representatives of the new governing organization, the City of Greater Sudbury and the Lake Huron North Channel Cycling Route.
2. The route terminus in Downtown Sudbury on Edmund Street provides opportunities for riders to stay downtown, go south to Bell Park and on to Highway 69 or go east to Highway 17/Wahnapitae
3. The route from Sudbury downtown eastwards will depend on the outcome of a meeting between representatives of the new governing organization and the Minister of Transportation.

Road and Trail Jurisdictions

City of Greater Sudbury	<p>At the time of writing, the proposed GBCyR follows these City of Greater Sudbury roads:</p> <ul style="list-style-type: none"> - Spanish River Rd, Fairbank Lake Rd, Bay St, Graham Rd - Regional Rd 55 (possibility of using some of the Trans Canada Trail), - Westview Crescent, Timothy Ave, Melvyn Ave, Patricia St - Mikkola Rd, Kantola Rd - Moxam Landing Rd, Gibson Rd. Southview Dr - Kelly Lake Rd, Copper St, Martindale Rd, Ontario St, Riverside Dr - Worthington Cres , Ramsey Road, Edmund St
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City of Greater Sudbury, continued

Improves Tourism Experiences

- GBCyR will provide a safe, designated cycling route for road touring cyclists travelling through the City of Greater Sudbury, using quiet rural roads, secondary highways, and inner-city Active Transportation Network signed bike routes.
- GBCyR aligns with the Active Transportation Network being developed by the City of Greater Sudbury, connecting on-road bike lanes, separated bike paths, cycle tracks, multi-use paths, shared wide residential streets and paved shoulders.
- GBCyR will provide complementary cycling opportunities for cyclists wishing to experience local on-road and mountain bike cycling experiences and attend cycling related events like BikeFest and the Canada Cup Mountain Bike competitions held at the Walden Mountain Bike Club trails.
- GBCyR will bring visitors into downtown Sudbury to take advantage of restaurants, arts and cultural facilities and visitor services.
- GBCyR will expand experiences for visitors staying in hotels, bed and breakfasts, resorts, lodges and campgrounds in the region, as well as those camping at Fairbanks Provincial Park and Centennial Park and other private campgrounds within the city.
- GBCyR links with numerous bike trails and routes in the City of Greater Sudbury; at the time of writing they include:
 - Rainbow Routes cycling and hiking trails,
 - TransCanada Trail,
 - Lake Huron North Channel Cycling Route (under development),
 - Junction Creek Waterway Park,
 - University of Sudbury and Lake Laurentian Conservation Area hiking and mountain bike trails,
 - Walden Mountain Bike Club Trails,
 - Ramsey Lake Circle Tour Trail (Tour de Sudbury)

Increases Tourism Visitation and Spending

- GBCyR meets the needs of the growing cycle tourism market, and as a result would bring increased visitation and spending to the Sudbury region.
- Because the City of Greater Sudbury is the regional transportation hub, cyclists can come to the region by air, road and rail, as well as bike.
- The slower pace of cycling (as opposed to auto) means visitors will stay longer when travelling through Sudbury or even if riding portions of the route.
- Visitation and spending for entertainment, accommodation, nutritious meals, bicycle services and guided tours would increase in Sudbury.
- Spending would increase for tourist attractions such as: Science North, including its IMAX theatre and Dynamic Earth, as well as museums, theatres, galleries and boat cruises; visitors would spend time exploring Sudbury's waterfront parks and trails.

Tourism Investment Opportunities

- With increased visitation and a focus on cycling, new business opportunities would be expected
 - Restaurants serving light nutritious meals, particularly at logical stopping points outside of the City.
 - Bike repair and service shops to complement the existing shops
 - Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservation and attraction admissions.
 - Community cycling festivals/events could garner higher participation because of association with high profile GBCyR.

District of Sudbury (South of the City of Greater Sudbury)

The Route

- The Route is approximately 70 km long in this area.
- NEW ROAD OR TRAIL INFRASTRUCTURE IS NOT REQUIRED WITHIN THE SOUTH PORTION OF THE DISTRICT OF SUDBURY, EXCEPT AS IT RELATES TO THE HIGHWAY 69 FOUR-LANE PROJECT.

NOTE: As a result of the ongoing Highway 69 four-lane project, the cycling infrastructure is discontinuous for approximately 35 km through this section. The route will be determined through meetings between representatives of the new governing organization and the Minister of Transportation.

Road and Trail Jurisdictions

Not determined at time of writing.

Improves Tourism Experiences

- GBCyR will provide a safe designated cycling route for road touring cycling travelling from Parry Sound to Sudbury.
- GBCyR will expand experiences for visitors staying at accommodations in at the major tourist nodes of Killarney and French River and those staying at inns, resorts, bed and breakfasts and other accommodations throughout the region. It will expand the experiences of campers in Killarney and French River Provincial Parks.
- GBCyR will link with existing trails in the region.

Tourism Investment Opportunities

With increased visitation and a focus on cycling, new business opportunities would be expected

- Restaurants serving light nutritious meals, particularly at logical stopping points.
- Bike repair and service.
- Guiding services with luggage shuttle, hospitality services to arrange accommodation, dining reservation and attraction admissions
- Cycle transportation business from Sudbury to Parry Sound until a cycling route is established.

Appendix B Municipalities and Other Organizations Contacted

Municipalities and Other Organizations Contacted During the Feasibility Study

Support Letter Received	Organization	Contact Person	Position
Regional Organizations			
X	Georgian Bay Destination Development Partnership	Meredith Armstrong Kim Clark	Chair Incoming Chair
	Ontario Ministry of Tourism Culture and Sport	Christine Anderson Laura Hernando	Tourism Regional Advisor Regional Tourism Advisor
X	RTO 13	Donna MacLeod	NE Ontario Tourism
X	RTO 12	James Murphy Randy	Executive Director Social Media & Marketing
X	RTO 7	Bill Sullivan Alex Hogan Paul Crysler	Executive Director Partnerships Manager President
	Ontario Ministry of Transportation, NE Region	Jason Ranger Roch Pilon	Senior Project Engineer Area Manager Highway Engineering
X	Ontario Ministry of Transportation, Sustainable & Innovative Trnsp Office	Michael Canzi Bram Westfall Robert Dolezel	Sr. Policy Advisor Team Leader Team Leader
X	Ontario Parks (1 letter for 15 provincial parks)	Greg Maude Dave Sproule	Mgr, Marking & Commun. NE Zone Marketing Specialist
Manitoulin District			
X	Assiginack Township	Alton Hobbes Brad Ham	Clerk Treasurer Reeve
X	Central Manitoulin	Ruth Frawley	CAO/Clerk
X	Tehkummah Township	Lorie Leeson Patsy Gilchrist	Councillor Clerk/Treasurer
X	Town of (NEMI) North Eastern Manitoulin and the Islands	Heidi Ferguson Pam Cress Kirsten Louma	Acting EDO Clerk EDO
X	Township of Billings	Kathy McDonald	Clerk Treasurer
pending	Sheguiandah First Nation	Richard Shawanda	Chief
X	Great Spirit Trail	Menesa Corbiere	
	Manitoulin Tourism Association	Ron Berti Shelba Millette	President Coordinator
	Manitoulin Chamber of Commerce	Owen Legge	President

Municipalities and Other Organizations Contacted During the Feasibility Study

Support Letter Received	Organization	Contact Person	Position
	Manitoulin Island Cycling Advocates	Maja Mielonen Guy Nielen	Chair Co-Chair
<i>Sudbury District</i>			
X	City of Greater Sudbury	Emily Trottier Mark Vanio Chris Gore Dave Kivi Meredith Armstrong	BD Officer Coordinator Event Support Mgr Community Prtnrships Co-ordinator of Roads Mgr Tourism and Culture
X	Town of Espanola	Cheryl Kenelley	Program Manager/ EDO
X	Town of Killarney		
X	Township of Baldwin	Peggy Young-Lovelace Archie Boivin	Clerk Reeve
X	Township of Nairn and Hyman	Robert Deschene Laurier Falldien	CAO Mayor
X	Municipality of French River	Sébastien Goyer Brennan Kenny	New CAO/ClerkED Manager
pending	Whitefish River First Nation	Robina Kitchemokman	EDO
X	French River Multi Use Trails Association	Mike Bushman Terry Young	
X	Rainbow Routes	Debbie MacIntosh	Executive Director
X	Sudbury Cyclists Union	Rachelle Niemela	Member
X	Sudbury District Health Unit	Sandra Lecle Carol Craig	Sustainable & Active Transportation
<i>Parry Sound District</i>			
X	Town of Parry Sound	Rob Mens Lynn Middaugh April McNamara Peter Brown	CAO Director of Dev & Leisure Leisure Services Coord Director of Public Works
	Seguin Township	Tom Stockie Kelly Krist	CAO Director of Community Services
X	Township of the Archipelago (N portion)	Stephen Kaegi	CAO / Clerk
	Township of Carling	Stephen Kaegi Mike Konoval Sue Woodhouse	CAO / Clerk Councillor Councillor
X	McDougall Township	Dave Rushton Peter Downing	CAO AT Committee
	Henvey Township		

Municipalities and Other Organizations Contacted During the Feasibility Study

Support Letter Received	Organization	Contact Person	Position
	Township of Wallbridge		
	Shawanga First Nation	Wayne Pamajewon	Chief
	Parry Sound Active Transportation Committee	Wendal Fisher	AT Committee Chair
	North Bay Parry Sound District Health Unit	Teryl Faulkner	convenes AT Committee
X	Georgian Bay Country (Tourism) Chamber of Commerce	Perry Harris	Interim Manager
	Park to Park (Trail Group)	Peter Seale	
	Georgian Bay Coast Trail	Laura Peddie	Executive Director
<i>Muskoka District</i>			
X	District of Muskoka	Samantha Hasting Craig Douglas	Acting Commissioner Active Planning & Development Engineering Services
X	Georgian Bay Township	Jennifer Schnier	EDO
X	Township of Muskoka Lakes	Chris Wray Lisa McMurray	CAO EDO
X	Simcoe Muskoka District Health Unit	Brittney Hillier	Public Health Nurse
	Muskoka Lakes Cycling Club	Brett Carson Brian Leggett	Treasurer/member
	Muskoka Tourism	Michael Lawley	Manager
X	Simcoe County Tourism	Kathryn Stevenson	Tourism Manager
X	Simcoe District Health Unit, Healthy Living Service	Joyce Fox Christine Johnson Kim Derald	Director Healthy Living Service
X	Township of Severn	Jane Dunlop Clayton Cameron Judith Cox	Mayor Roads Foreman Deputy Mayor
X	Tay Township	Robert Lamb Mara Burton Bryan Anderson	CAO Planner Manager of Parks & Rec
X	Midland	Brian Peter Nicole Hutton Dave Hamelin	Director of Parks & Rec Parks and Harbours Roads
X	Penetanguishene	Holly Bryce Julie Anne Columbus	Town Clerk Director of Parks and Rec

Municipalities and Other Organizations Contacted During the Feasibility Study

Support Letter Received	Organization	Contact Person	Position
X	Tiny Township	Doug Luker Steve Ott	CAO/Chair Tiny Trails & Active Transportation Committee
X	Town of Wasaga Beach	Gerry Reinders Jenny Leggett	Manager of Parks, Facilities & Rec Mgr of ED/Tourism
X	Clearview Township	Shane Sargeant	Director of Parks & Facilities
X	Town of Collingwood	Marta Proctor Mark Bryan Wendy Martin	Director Parks & Rec Community Planner Parks & Recreation Mgr
X	Ontario's Lake Country	Jennifer Whitely	Manager
X	Simcoe Barrie Cycling Club	Robb Meier Brendan Metheson	President Consultant
X	Wasaga Beach PP	John Fischer Dave Sproule	Superintendent
	South Georgian Bay Tourism		
	Simcoe County Trails	Frieda Baldwin	Project Manager
Grey County			
X	Grey County	Michael Kelly Bryan Plumstead Amanda Pausner	Director of Transportation Tourism & Economic Development
X	Town of the Blue Mountains	Shawn Everett	Director of Recreation
X	Municipality of Meaford	Denyse Morrissey Amber Knott	CAO Supervisor Recreation Programs & Services
X	City of Owen Sound	Steve Furness Paulette Pierol	Manager of Economic Dev Tourism Manager
X	Township of Georgian Bluffs	Murray Hackett	Roads & Engineering
X	Grey Bruce Health Unit	Andrew Barton	Health Promotion
	Meaford Chamber of Commerce	Shirley Keaveney Donna Earl	President
	Collingwood Cycle Club	Steve Varga	President
	Pedal Pushers Cycling	Noelle Wansbrough	Owner
X	Owen Sound Cycling Club/ Tom Thompson Trail	Tom Hakala	Representative
	Ride On Bikes	Paul Bishop Christian Lewin	Owner Associate
X	Bruce County Tourism	Kim Clarke	Tourism Manager
X	Bruce County	Brian Knox Chris Laforest	County Engineer Director of Planning & ED

Municipalities and Other Organizations Contacted During the Feasibility Study

Support Letter Received	Organization	Contact Person	Position
	Township of South Bruce Peninsula	Danielle Mulasmajic Tom Gray	ED Officer Manager of Public Works
X	Township of Northern Bruce Peninsula	Bill Jones	CAO
X	Owen Sound Transportation Company	Kim Rutherford	VP of Finance
	Tobermory & District Chamber	Ashley Miller Jason Angus	President Rider/member
X	Bruce Peninsula National Park	Frank Burrows Robyn Simard Monique Wall	Superintendent External Relations & Outreach Visitor Experience Manager
	Peninsula Adventure Sports Ass'n	Jack Van Dorp	Director

Appendix C Benefit and Cost Assessment Report

**GEORGIAN BAY CYCLING ROUTE
FEASIBILITY STUDY**

Benefit and Cost Assessment

Prepared for

The Georgian Bay Cycling Route Steering Committee

Prepared by

**Transportation Options Association of Ontario &
The Resource Management Consulting Group**

April 4, 2014

This project was made possible through funding by:



1 Benefit Assessment

1.1 Benefits for Communities Along the Route

The Georgian Bay Cycling Route (GBCyR) will result in a continuous 1000 km bike route that links the ongoing cycling initiatives of all communities along the route. Approximately 800 km of the route, from Parry Sound south and around to Sudbury, follows existing roads and trails and can be implemented immediately. For this portion of the route, infrastructure investment will be low, and the benefits to communities (both municipalities and First Nations) substantial.

Resolution of the route between Sudbury and Parry Sound will follow a meeting between GBCyR Steering Committee representatives and the Minister of MTO regarding cycling infrastructure and the Highway 69 four-lane project.

During the course of this project, we reached out to and met with representatives of the communities (counties, districts, townships, cities, towns and First Nations⁹, as well as representatives of cycling organizations, Health Units and tourism organizations. At the time of writing, fifty-four letters of support for the GBCyR have been received as a result of these efforts and the previous initiatives of the Manitoulin Island Cycling Advocates (MICA).

Communities and organizations support the concept¹⁰ of the GBCyR because it will:

- Result in a 1000 km high-profile bicycle route that is suitable for a wide variety of cyclists:
 - Goal riders who ride the entire route in one trip (7-14 days depending on cycling ability and purpose of the ride),
 - Goal riders who ride the route in segments over a period of time,
 - Tourists and seasonal residents who stay in one location and ride the route on either side of their location,
 - Local residents who use the route for commuting or recreation;
- Support the communities' ongoing initiatives related to Active Transportation, off-road cycling trails, paved shoulders and designated on-road cycling routes;
- Help communities set priorities for cycle route/trail development and enhancement.

Many destination marketing organizations and tourism businesses along the GBCyR are currently investing in developing cycle tourism product because they believe it will attract more visitors, increase their length of stay and increase visitor spending (Appendix A). The GBCyR supports these ongoing cycle tourism initiatives because it will:

- Help communities meet the growing demand for safe cycle tourism by expanding the opportunities for recreational, experienced and touring cyclists;
- Be a new product that aligns with tourism positioning of the community destination marketing organizations: active, outdoor recreational experiences;

⁹ Shawanaga First Nation chose not to comment or participate in the regional consultation. At the time of writing, Sheguinda First Nation supports the GBCyR and the Council of Whitefish River First Nation is considering support.

¹⁰ These communities support the GBCyR in principle, but have not committed to budget funds for management, signage, marketing or infrastructure.

- Link many of the existing tourism attractions along Georgian Bay, providing an alternative to car transportation and a fresh way to market tourism attractions; and
- Complement and further promote the communities and tourism businesses already participating in the Ontario By Bike Network (formerly the Welcome Cyclists Network).¹¹

In addition, an icon route such as GBCyR has the potential to increase the profile of cycling events/fundraisers/races, cycle group tours and annual goal rides, thereby bringing visitors to the area and resulting in increased spending. Group events are important because they attract new cyclists to the region, the cyclists come before an event to check or train on the route, they stay overnight and often bring friends and family. If they like the route and area, they will return.

Based on the outcomes of community consultations with municipalities, tourism organizations, Health Units and cycling organizations, the tourism benefits of the GBCyR are described in detail by county/district in Appendix A. In summary, the GBCyR will strengthen the following ongoing community cycle tourism initiatives:

- Muskoka District Active Transportation plan to add more cycling lanes enhancements to expand on the Lake Joseph Road cycling lane projects,
- Cycle Simcoe County 2014 pilot project to develop cycling routes in Oro-Medonte Township and future plans to expand cycling initiatives around Midland-Pentanguishene and Wasaga Beach and Collingwood,
- Tourism Barrie's advocacy to Go Transit regarding improved week and weekend services with BikeTrain amenities to bring GTA cyclists to Barrie, Simcoe County and link to GBCyR.
- Centurion Cycling series events at Blue Mountain Resort and Horseshoe Resort, which is raising the profile of Grey and Simcoe Counties as cycling destinations,
- Simcoe County Trails/Martyrs' Shrine plan to develop a multi-use Pilgrim Trail from the GTA to Martyrs' Shrine in Midland,
- Grey County Tourism's ongoing road cycling route development that connects to GBCyR,
- Tom Thompson Trail (off-road) development between Meaford and Owen Sound could become part of GBCyR when complete,
- The newly designated Lighthouse Trail in Bruce County would benefit from being associated with a larger Ontario cycling route,
- The Owen Sound Transportation Company is increasing the tourism focus of the Chi Cheemaun, and it would benefit from increased ridership from cyclists following the GBCyR,
- The current initiative to develop and implement an Active Transportation Network plan in the City of Greater Sudbury,
- The MICA network of trails through Manitoulin Island will benefit from being linked to a larger Ontario cycling route, and
- Ontario By Bike Network participation in Simcoe County, Grey County and Manitoulin Island, resulting in a growing number of businesses certified as bicycle-friendly locations and regions promoted as 'Great Places to Cycle'.

As Georgian Bay becomes a recognized cycling destination, cyclists will come specifically to ride part or the entire route. Some measured economic benefits of tourism cycling and cycling routes are provided in Section 1.4, based on research in the Georgian Bay Region, Ontario, Canada and other parts of the world. These numbers show that cyclists are an important and growing component of the tourism market and that economic benefits will result from providing quality cycling experiences. These benefits will include:

¹¹ Further information about Ontario by Bike may be found at www.ontariobybike.ca.

- More spending by cyclists at accommodations, restaurants, stores and tourist attractions (opportunities to expand services along high-demand parts of the route), and
- More spending on cycle-related equipment, clothing and gear (opportunities for businesses to expand or new businesses to service cyclists at underserved parts of the route).

1.2 Tourism Benefits for the Georgian Bay Region

GBCyR will become a new tourism product for the Georgian Bay region that can be marketed by Georgian Bay Destination Development Partnership (representing tourism businesses around Georgian Bay), the three regional tourism organizations (7, 12 and 13a) and numerous destination marketing organizations (representing communities and tourism product clusters). The GBCyR aligns well with the existing cycling product and other tourism products already being marketed for the region that focus on outdoor experiences and healthy lifestyle: hiking, paddling, local food and beverage, beaches, spas, nature, and waterfront views.

The GBCyR can play an important role in helping Georgian Bay become a recognized cycling destination in Ontario similar to established destinations such as the Niagara region, Ottawa region and the Waterfront Trail. Because cycle tourism is increasing, with appropriate development and marketing, GBCyR has the potential to attract Ontario recreational cyclists for portions of the route, as well as touring cyclists from Ontario and outside Ontario for extended overnight stays, thereby generating **increased tourism spending** for services related to accommodation, dining, cycling services, arts and culture. The GBCyR will bring together and give higher profile to the numerous tourism cycling initiatives, cycle trail development projects and active transportation programs of the communities and tourism organizations along the 1000 km route.

Appendix B, Performance Measures, provides an assessment of existing cycle visitor tracking for the Georgian Bay Region, makes suggestions for aligning visitor research with other tourism organizations and describes some initial performance measures that can be used to infer increased visitor spending, increased visitation, increased investment and improved customer experiences for the route. While it will be difficult to measure attainment of performance objectives until the route has been in place for a number of years, it is important to do as much tracking as possible at the outset to provide benchmarks for measuring the role of GBCyR in building the capacity of the tourism industry in the communities and around Georgian Bay.

1.3 Benefits for Ontario

The GBCyR aligns with *#CycleON*¹², the new Ontario government strategy to encourage the growth of cycling and improve the safety of people who cycle across the province. It will help Ontario residents reap the benefits identified in the *#CycleON strategy*:

- Improved personal and public health for residents and visitors to the region,
- Cleaner environment by providing an alternative to road transportation for residents and visitors,
- New tourism product to meet the growing demand for cycling experiences, and
- New business opportunities to service residents and visiting cyclists.

At 1000 km, GBCyR has the potential to become Ontario's third signature cycling route and the second-longest route in the province. Its length and concept aligns with Ontario's two longest cross regional, signed routes:

¹² <http://www.mto.gov.on.ca/english/pubs/cycling-guide/pdfs/MTO-CycleON-EN.pdf> *#CycleON: Ontario's Cycling Strategy*, Ontario Ministry of Transportation, 2013

- **The Waterfront Trail** (1400 km) follows the north shores of Lake Erie and Lake Ontario and the St. Lawrence River from Sarnia to the Quebec border. Thirty percent of the route is off-road on dedicated paths and 70% on residential streets or shoulders of major roads. Most sections are paved but some areas have gravel or packed limestone. Plans are underway to extend the Waterfront Trail north along the Lake Huron shore towards Goderich.
- **Ontario Greenbelt Cycling Route** (450 km, to be launched 2015) is within the Greenbelt, 728,000 hectares of protected countryside around Toronto. The route follows existing roads through mostly rural areas from Cobourg to the Niagara River. This route will be used for recreational cycling, commuting, touring and goal rides.

The concept of the GBCyR also aligns with Ontario's other well-known province-wide trails: Trans Canada Trail (multi-use, including cycling) and Bruce Trail (hiking only). It supports Ontario's positioning as a destination for outdoor recreational experiences, providing an environmentally sound way to be connected to Ontario's communities and attractions.

1.4 Tourism Benefits of Cycling Routes

Georgian Bay Region Overview

The interest in developing cycling product in the Georgian Bay region is increasing. As a result, there has been some research directed towards visiting cyclists in the past two years:

- Research at the 2013 Toronto Bike show found that BruceGreySimcoe (BGS - RTO 7) attracted a similar proportion of road and mountain bikers; 36% had biked in BGS in the past five years and 84% would be interested in cycling in BGS in the next two years; road cyclists were interested in self-guided road tours (52%), self-guided from central hub (41%), guided road tour (31%) and charity rides (36%).¹³
- In 2012, 42% of the 2,800 riders that participated in the Blue Mountain Centurion Cycling event visited the area at least once to train prior to the event. The average spending per rider on event weekend was \$331.¹⁴
- Road cycling was identified as one of the top three experiences by 5% of Georgian Bay visitors in a 2009 intercept survey of 1400 visitors to the Georgian Bay region.¹⁵
- A survey done by MICA of Manitoulin Island cyclists found that the average stay of a cyclist on Manitoulin Island during the 2013 season was 6.5 days.¹⁶
- During the 2013 season, over 4000 cyclists travelled on the Chi Cheemaun ferry (walk-on cyclists plus count of bicycles on vehicles).¹⁷
- In 2011, 737,000 Canadian (including Ontario) visitors participated in cycling activities while visiting the regions around Georgian Bay. The numbers for each region are as follows: Region 7, Bruce Peninsula,

¹³ The Resource Management Consulting Group, Toronto Bike Show Survey 2013, unpublished report prepared for Tourism Simcoe County.

¹⁴ The Resource Management Consulting Group, Rider Survey 2012, unpublished report prepared for Blue Mountain Village Association and Centurion Canada.

¹⁵ The Resource Management Consulting Group, Georgian Bay Summer Visitor Survey 2009, unpublished report prepared for the Georgian Bay Destination Development Committee.

¹⁶ Unpublished survey undertaken by Manitoulin Island Cycling Advocates, e-mail correspondence from Guy Nielen, January 24, 2014).

¹⁷ Kim Rutherford, Owen Sound Transportation Company, e-mail dated October 30, 2013.

Southern Georgian Bay and Lake Simcoe - 471,000 visits; Region 12, Muskoka, Parry Sound and Algonquin Park - 238,000 visits; Region 13a, North East Ontario - 23,000 visits.¹⁸

Ontario Overview

Research in Ontario also documents important tourism benefits of cycling, cycling routes and cycling events:

- In 2011, 12% (1.6 million) Canadian visitors (including Ontario visitors) participated in cycling activities while travelling in Ontario. These visitors spent an average of \$198 per person for a total of \$317 million.¹⁹
- Between 2009 and 2010, the number of cycling visitors increased by 25% and spending increased by 18%.²⁰
- In 2010, 436,000 Canadian (including Ontario) cycle tourists cycled in the following four Census Municipal areas (CMA): Toronto CMA (223K); Ottawa CMA (110K); St. Catharines–Niagara CMA (84K); and Windsor CMA (21K). The spending of these cycle tourists contributed \$104 million to the economy in 2010.²¹
- Windsor Eats Wine Trail Rides generate approximately \$10,000 in local spending on each 5-6 hour sold out tour.²²
- Cycle tourists staying one or more nights in Niagara spend on average \$148, excluding accommodation. Calculated within this figure is food and beverage accounting for 61% of spending, retail purchases including wineries 27%, and attractions 12%. In this study, 68% of cycle tourists stayed one night; 18% two nights, and 14% three or more nights.²³
- Based on a 2002 Waterfront Trail User Survey most trail users spend between \$3 and \$12 per trip with visitors / vacationers spending more than those individuals who live near the trail. Typically long distance users spent on average \$244 annually along the trail while short distance users spent on average \$182 annually.²⁴
- Participants on the Lake Ontario Great Waterfront Trail Adventure – 720 km, eight day touring event – spend approximately \$73,000 on accommodations and food, above nightly camping and 3 meals included in registration.²⁵

International Overview

The economic and tourism benefits of designated cycling routes are recognized worldwide. The following research provides a sample of some of the internationally documented and measurable benefits:

- Cycling industry contributes \$133 billion annually to the US economy, supporting 1.1 million jobs and \$17.7 billion (US) in federal, state and local taxes. A total of \$46.9 million is spent annually on bike trip and tours.²⁶

¹⁸ <http://www.mtc.gov.on.ca/en/research/rtp/rtp.shtm> Ontario Regional Tourism Profile 2011

¹⁹ <http://www.mtc.gov.on.ca/en/research/rtp/rtp.shtm> Ontario Regional Tourism Profile 2011

²⁰ <http://www.mtc.gov.on.ca/en/research/rtp/rtp.shtm> Ontario Regional Tourism Profile 2009, 2010. (2011 data are not comparable to 2010 and 2009 data due to change methodology for the Travel Survey of Resident Canadians.)

²¹ Dodds, R. and Singh M. Sustaining Tourism, Cycle Tourism Research - Potential to Move Towards an Ontario-wide Cycle Tourism Partnership: Three year strategic plan (Appendix A), prepared for Transportation Options, 2010. (Source data: Statistics Canada, Travel Survey of Residents of Canada, 2007–2010).

²² <http://www.ontariobybike.ca/octf13presentations> Ciotoli, A. Windsor Eats. Presentation at the 2013 Ontario Cycle Tourism Forum

²³ Transportation Options. Economic Impact of Cycle Tourism: Niagara Region and Greenbelt Areas, 2010.

²⁴ <http://www.waterfronttrail.org/partner-resource-center/publications> Waterfront Regeneration Trust, User Survey May to August 2002, A Look at People and Places on the Lake Ontario Waterfront, Prepared by David Ritter, Nikki Rendle, Robert Coughlin, Levy-Coughlin Partnership

²⁵ Koehler, M. Waterfront Trust Organization, Presentation at Partners Summit, 2011.

²⁶ [http://www.advocacyadvance.org/site_images/content/Final_Econ_Update\(small\).pdf](http://www.advocacyadvance.org/site_images/content/Final_Econ_Update(small).pdf) The League of American Bicyclists – The Economic Benefits of Bicycle Infrastructure Investments, 2012

- In the United Kingdom, 2% of all leisure/day trips and 1% of all holiday trips are generated by cycling, while in Ireland, 9% of all overseas visitors are considered cycle tourists spending on average £538 each.²⁷
- In New Zealand, it is estimated that 3% of overseas and 1.6% of domestic tourists cycle between destinations in the South Island, drawing in an estimated \$72 million (NZ) per annum into the economy.²⁸
- In Australia, on the Murray to Mountains Rail Trail, cyclists spent a total of \$258 (AUS) per person per day in 2006, an increase from \$203 (AUS) in 2003.²⁹ Located in the north east State of Victoria, this is Australia's most well used regional rail.
- In Scotland, cycling as a tourist activity represented 1 million (or 8%) of all trips to Scotland in 2003 and £219 million in revenue.³⁰
- As early as 2000, several towns along the Danube Cycle Route in Upper Austria were depending on cycle tourism, with bed-nights from cycling visitors accounting for between 60% to 80% of all stays.³¹

Ontario By Bike Network

Evidence of growing cycle tourism in Ontario is shown by the rapid growth of the Ontario By Bike Network. The program assists with the development and promotion of cycle tourism in Ontario by creating a network of businesses enhancing the cycle tourism sector regionally and province-wide.

Established in 2010 by Transportation Options, a non-profit organization, the Ontario by Bike Network now has over 800 certified bicycle-friendly tourism and business participants throughout Ontario including: accommodations, restaurants, cafes, wineries, attractions, bike stores, bike tours and bike rental locations. The Network currently extends to 26 regions across Ontario with the following regions along the GBCyR already participating: Grey County, Simcoe County and Manitoulin District. As the certification of bicycle-friendly businesses and regions increases, Ontario by Bike is helping generate the tourism and economic benefits for businesses, while improving the quality of cycling experiences for Ontario visitors and residents.

1.5 Case Studies of Canada's Icon Trail Systems

Canadian provinces have a number of iconic trail systems that appeal to cycle tourists. Most incorporate recreational and multi-use trail systems, some are solely using a network of road routes. Each trail or route is unique with differing landscapes, infrastructure, governance and funding structures.

Four relevant Canadian case studies summarized on the following pages are based on an unpublished report commissioned by Transportation Options and prepared by Ryerson University.³² The case studies are:

- Cabot Trail, Cape Breton Island, Nova Scotia,
- Confederation Trail, Prince Edward Island,

²⁷ <http://atfiles.org/files/pdf/Faulks-Australia-Cycle-Tourism.pdf> Cycle Tourism in Australia: An Investigation Into Its Size and Scope, Sustainable Tourism Cooperative Research Centre, 2007

²⁸ <http://atfiles.org/files/pdf/Faulks-Australia-Cycle-Tourism.pdf> Cycle Tourism in Australia: An Investigation Into Its Size and Scope, Sustainable Tourism Cooperative Research Centre, 2007

²⁹ https://www.bicyclenetwork.com.au/media/vanilla/RT%20Report%2009_Final.pdf . Beeton, S., Cycling in Regional Communities: A longitudinal study of the Murray to the Mountains Rail Trail, Victoria, Australia. Internal research report. Bundoora: La Trobe University. 2009

³⁰ http://www.visitscotland.org/pdf/cycling_2006_to_2015.pdf Greenwood, C. and Yeoman I. Forecast for Cycle Tourism in Scotland to 2006 to 2015

³¹ L. Lumsden, Transport and Tourism: Cycle Tourism – A Model for Sustainable Development? Journal of Sustainable Tourism, Vol. 8, No. 5, 2000.

³² Ryerson University, Designated Cycling Routes, Tourism Impact and Opportunities, unpublished research study prepared E.Chang, A.Cho, J.Colatosti, M.Yiu, K. Zhi for Transportation Options, 2013.

- Galloping Goose Regional Trail, British Columbia,
- La Route Verte^{33,34 35} and La Véloroute des Bleuets.

The following points are common to these trail systems:

- The development of trails and routes are multi-year projects, some having been established decades ago.
- Funding to develop trails and routes comes from a variety of sources, primarily public sector funds and grants. Municipalities contribute annually to maintenance and special projects.
- Many trails have been co-designated with the Trans Canada Trail, and often benefit from capital infrastructure investments associated with the development of the Trans Canada Trail.
- Trails have a designated coordinating organization or agency.
- Developed routes have operators offering cycling tours and packages.
- Cycling tours are most frequently purchased by recreational types of cyclists.
- Out of province, US or international visitors use trails and purchase cycling tours.
- Trail users account for a large amount of annual visitor spending.
- Businesses and communities servicing trail users are experiencing positive financial benefits.
- Trails are marketed using a variety of promotions. Each trail has a strong on-line marketing presence with detailed information housed on trail-specific websites.
- The regional and provincial tourism agencies play active roles in marketing of trails.

³³ http://www.velo.qc.ca/files/file/vq/VQ_EV2010_en.pdf Velo Quebec. Bicycling in Quebec. 2010.

³⁴ http://www.routeverte.com/rv/retombees_e Velo Quebec. Economic Spin-Off's. Webpage

³⁵ www.veloquebec.info/documents/bicyclingquebec2005-en.pdf Bicycling in Quebec 2005

Canadian Cycle Route Development Case Study
Cabot Trail, Cape Breton, Nova Scotia

Description

- The Cabot Trail is a 300 km loop highway road route located in Cape Breton, Nova Scotia.
- The Trail is world renowned for its beautiful scenic ocean views and also provides visitors a way to experience the unique Gaelic and Acadian cultures in Nova Scotia.
- Although not designated as a cycling route the Trail has been deemed one of the world's top ten cycling destinations by Lonely Planet.

Trail Funding & Development

- Trail development was originally funded by the Government of Canada and organized by the Cabot Trail Working Association, a non-profit organization.
- The Cabot Trail Working Association has been successful raising funds to improve view-planes in strategic trail locations and enhance general information signage.
- Beginning in 2010 and ongoing is the *Cabot Trail Facade and Streetscape Program*, with the primary purpose of encouraging the growth and long-term economic spinoff for the communities near the trail area. The fund provides a 50% cost-sharing incentive to allow accommodation and retail owners to renovate their storefront, increasing curb side appeal for trail users. This program is funded by business participants, Enterprise Cape Breton Corporation, Nova Scotia Economic and Rural Development and Tourism for a total of \$1.5 million to date. The Trail working group, community, municipal and regional partners play a role in overseeing program.

Demographics of Users and Tours

- Cycling tour packages are sold primarily to recreational cyclists, followed by touring and expert cyclists, and lastly family and leisure travellers.
- Equal numbers of female and male visitors aged 46-55 years of age purchase cycling tour packages.
- Tour packages are primarily purchased by international travellers, mainly from the United States, with a few from Australia and the United Kingdom; 30% of packages are purchased from visitors within Canada; only 2-4% of locals within the province buy packages. The most popular cycling packages are for 5 days and 4 nights.

Marketing the Cabot Trail

- The Cabot Trail is actively promoted as a destination for cycle, motorcycle and auto tours by Nova Scotia Tourism.
- The Cabot Trail does most of its promotional and marketing initiatives on-line; however the route is also marketed through magazine ads, newsletters (American Bicyclist) and Facebook.
- Tour companies do additional promotions selling cycling tour packages.

Tourism and Economic Benefits

- In 2010, 2% or 40,000 visitors cycled while in Nova Scotia and they spent an average of approximately \$98 per person per day during their visit.
- Businesses associated with the Cape Breton facade improvement experienced an average 15-20% increase in business traffic and revenue, some businesses experienced a 50% increase in business traffic and revenue.
- A 2005 study of 18 Nova Scotia tour companies found the estimated total revenue from cycling tours during a 7 week period was over \$1.23 million.

Canadian Cycle Route Development Case Study
Confederation Trail, Prince Edward Island

Description

- This 400 km converted recreational rail trail transverses Prince Edward Island (PEI) and is a part of the Trans Canada Trail.
- The multi-use trail is primarily rolled hard packed stone dust surface and is extremely popular with cyclists.
- There are many villages, attractions and services lining or within close proximity of the trail.

Trail Funding & Development

- The Confederation Trail is part of the Trans Canada Trail and as such has received funding from the Government of Canada, through the Tourism division of Atlantic Canada Opportunities Agency.
- With a \$1 million donation from the W. Garfield Weston Foundation and an additional \$400,000 from Trans Canada Trail, an additional 30 kilometers stretch will be completed in 2014.

Demographics of Users and Tours

- Recreational cyclists purchase the most cycling tour packages, most travelling as couples, followed by families and then singles. Competitive cyclists are the least likely to purchase cycling tour packages on this trail. Tour purchasers are primarily 46-55 years of age with an equal split between females and males.
- 45% of tours are purchased by international visitors, 40% by residents within Canada, and only 15% by locals within the province.
- The most popular cycling packages are 5 days and 4 nights long. Peak tour months are June, July and August.

Marketing the Confederation Trail

- The Confederation Trail is actively promoted as a cycling destination by Prince Edward Island Tourism
- In 2011, the Government of Canada, through the Tourism division of Atlantic Canada Opportunities Agency plus provincial and regional partners provided \$340,000 to fund an initiative to provide marketing funds to Atlantic Canada Trail Association to promote east coast trails as tourism and recreation destinations.
- Tour companies actively promote cycle package sales.

Tourism and Economic Benefits

- Of a total of 33,081 trail trips captured at three survey locations on the Confederation Trail between June to September 2012, 63% or 20,864 trips were made by cyclists. 59% of all trail users were estimated to be visitors to the province.
- 29% of the total amount spent on the visitor's duration of the trip is attributed to trail related businesses and activities. Businesses within 30 minutes of the trail received 25% of total visitor spending on trail-related activities.
- Of trail users total spending estimated at \$2,757,995 in 2012, \$2.1 million was generated within 30 minutes of the trail, and cyclists spending contributed 68% to that total amount.
- Of total spending 27% was generated from accommodations and camping, 21% from restaurants, 13% from recreation and entertainment, 31% from general transportation, and 8% from other expenditures.
- Studies show that 59% of PEI visitors used the Confederation Trail, including 45% of international visitors.
- Prior to arriving at PEI, between 60-69% of visitors from other provinces planned to use the trail.

Canadian Cycle Route Development Case Study
Galloping Goose Regional Trail, British Columbia

Description

- This multi-use 55 km rail trail runs from Victoria to Sooke, on Vancouver Island.
- Trail users are able to experience and enjoy a variety of scenery from urban to rural to wilderness.
- Galloping Goose is able to differentiate itself from other trails in Canada because the climate on Vancouver Island makes it usable all year around.
- The Trail first opened in 1987 and is now a part of the Trans Canada Trail system.
- The Trail connects to the 33 km Lochside Regional Trail that goes from Victoria area north to Swartz Bay, the primary ferry terminal to Vancouver Island.

Trail Funding & Development

- Capital Regional District (CRD) Regional Parks division constructs, operates and maintains Galloping Goose Trail.
- CRD takes the primary role in accessing funds for the Galloping Goose Trail. Funds come from a variety of funding partners and sources including: municipalities, lottery funds, TransLink, BC crown corporations, the federal government, Cycling BC, British Columbia Cycling Coalition, BC Parks Partnership and Donations Program, Boys & Girls Clubs, and the Ministry of the Environment.
- In 2011, parking fees for BC Parks were removed, decreasing revenue that previously had helped offset the costs of park services for visitors.
- In recent years the Galloping Goose Trail has faced funding challenges with insufficient funding affecting route maintenance and postponing trail extensions.
- Galloping Goose Trail users are demanding more washrooms, water fountains and connections to the municipal bicycle lanes in cities.

Demographics of Users and Tours

- In 2012, an estimated 2 million trail users enjoyed the Galloping Goose Trail.
- Most visitors either biked to the Galloping Goose Trail or drove to the trail head and then cycled.
- Tour companies primary target markets are family and leisure cyclists, followed by recreational and touring cyclists. Expert cyclists are least likely to purchase the cycling tour packages.
 - Families, followed by couples and singles are the most frequent purchasers of cycle tours with an equal level of females and males, most commonly aged 56-65 years of age.
 - The majority of tour purchases come from within Canada (55%), followed by international visitors (40%) and BC residents (5%).
 - While tour operators offer tours of various durations, sales are 20% same day trips and 80% overnight (all accommodations are in hotels, motels and bed and breakfasts).

Marketing of the Galloping Goose Regional Trail

- The trail is marketed through a variety of on-line sites and printed maps, including *the Cycle Map & Guide Vancouver Island*.
- Tour companies market their cycling tour packages through company websites, visitor bureaus, and the Cycling BC association.

Tourism and Economic Benefits

- Galloping Goose Trail tourism revenue consists of 35% accommodation and food services, 31% in transportation, 26% in retail services and 8% in other services.
- Galloping Goose Trail has reportedly increased revenue for nearby bike shops and coffee shops.
- In a 2012 report, the direct impact of economic benefits from bicycle sales, including parts and accessories, totals approximately \$140 million per year in the province.

Canadian Cycle Route Development Case Study
La Route Verte and La Véloroute des Bleuets

Description

- La Route Verte is a 5,000 km bicycle network across the province of Quebec.
- La Véloroute des Bleuets is a 256 km regional cycling circuit, a part of La Route Verte and situated in the Saguenay–Lac-Saint-Jean area.

Trail Funding & Development

- La Route Verte was made possible by partnerships and networks between The Ministry of Transport and Vélo Québec, with additional support from municipal and regional partners. The Ministry of Transport oversees the planning and development of the network segments on roads under its jurisdiction and acts as a link between on-site activities developed by Vélo Québec. \$290 million was invested in the Quebec bicycle network between 1996 and 2010.
- The funding models and partnerships for La Véloroute des Bleuets include federal and provincial government, plus First Nations communities, local municipal and regional partners in Saguenay-Lac-Saint-Jean.
 - \$6.9 million in non-repayable funding was allocated for the development La Véloroute des Bleuets.
 - In 2010, the annual financial contribution to La Véloroute des Bleuets by municipalities was a total of \$877,482, in the following amounts: \$198,262 was allocated towards maintenance; \$119,070 was to promotion and marketing; \$56,642 went towards the equipment and infrastructure to implement the Cycloguide and GPS system for Véloroute des Bleuets, providing trail users with routing information, plus information on communities and a range of service and tourism businesses located on or near the trail; \$181,000 was put towards creating new accommodations, specifically 26 new campsites for touring cyclists at Saint-Henri-de-Taillon, which is located 2km of the Véloroute des Bleuets.
- The Véloroute des Bleuets was awarded \$15,500 through a Community Diversification program to develop its 2010 to 2015 strategic plan.

Demographics of Users and Tours

- A 2006 study conducted by Vélo Québec found that:
 - 54% of the Quebec population between the ages of 6 and 74 identified themselves as cyclists, with the largest number of cyclists in the 18-24 age group.
 - Out of the users of La Route Verte, 38% of the tourists were from outside of Québec.
 - Cyclists within Québec are well-educated and have high disposable incomes. 45% of cyclists are university graduates with 68% of cyclists with an annual income of more than \$40,000.
- Tour operator for the La Véloroute des Bleuets reports:
 - The highest number of tour packages are sold to recreational cyclists, followed by family/leisure cyclists and lastly the touring and expert cyclists.
 - Trail users that purchase tours are more likely to be travelling as couples, followed by families and then singles. Competitive cyclists are the least likely to purchase cycling tour packages.
 - Tour purchases are made by an equal number of female and male visitors, most commonly aged 46-55 years.
 - La Véloroute des Bleuets' cycle tour packages are purchased by residents from within the province at approximately 60%, 10% from within Canada and 30% are international visitors.
 - Approximately 50% of tours are multi-day and 50% are single day tours. The most popular length for a multi-day tour is for 5 days and 4 nights.
 - July, August and September are peak months for tour operators.

Marketing La Route Verte and La Véloroute des Bleuets

- To help market La Route Verte, improve visitor experience and increase visitor spending, Vélo Québec operates an accommodation certification program called 'Bienvenue Cyclistes!'. There are currently over 600 locations participating throughout the province.
- La Véloroute des Bleuets' representatives and tour operators have participated in international Adventure Travel Trade Association shows and in the Toronto and Quebec bicycle shows to promote the route and their tour packages.

Tourism and Economic Benefits

- In 2000 Route Verte cyclists spent \$95.4 million. Vélo Québec estimates that this figure has grown to \$134 million annually since 2006.
- In a 2005 study by Vélo Québec³⁶, it was determined the following in relation to the different types of cyclists and cycle tourists:
 - For the 200,000 people for whom cycling was the main motivation for travel they take an average of 2.2 bicycle trips annually, spending an average of 6.8 days vacationing by bicycle per year, Accommodation choices range with 53% choosing to stay at tourist accommodations (B&B's, hotels, motels, etc.), and 32% in campsites. On average they spend \$83 per day, in comparison to the \$66 per day spent by regular Québec tourists
 - For the 410,000 people for whom cycling was one of a number of vacation activities in Quebec they take an average of 3.5 trips annually and cycled for an average of 5.4 out of 9.7 vacation days. Accommodations choices include 35% preferring hotel establishments and 35% campsites. Their vacation spending averages \$200 annually for the bicycle portion of their trips.
- The Quebec bicycle industry has reported approximately \$181 million in sales, supporting 2,800 jobs, producing tax revenues of \$17.2 and \$13.6 million for the Government of Quebec and Government of Canada respectively.
- La Véloroute des Bleuets is estimated to generate an annual regional economic spin-off of \$6 million.

³⁶ www.veloquebec.info/documents/bicyclingquebec2005-en.pdf Bicycling in Quebec 2005

1.6 Health Benefits of Cycling

Ontario's Cycling Strategy, #CycleON succinctly summarized the personal and public health benefits of cycling from the perspective of the Ontario Medical Association, Ontario Ministry of Health and Long-Term Care and Toronto Public Health:

- Cycling keeps people active. A lack of physical activity is recognized as a significant risk factor in cardiovascular diseases, diabetes, cancer, hypertension, bone and joint disease and depression.³⁷
- Cycling burns calories and helps people meet the physician-suggested levels of physical activity of the Ontario Medical Association.³⁸
- Increasing cycling would have cumulative societal benefits. According to the Canadian Medical Association, "a 10 per cent increase in physical activity could reduce direct health-care expenditures by \$150 million a year. This does not include indirect costs such as lost productivity due to illness, premature death or a range of other factors, including mental illness and poor quality of life."³⁹
- Cycling can also help improve mental health. Stress management and a healthy work-life balance are important factors in maintaining mental well-being. According to Ontario's Ministry of Health and Long-Term Care, engaging in physical activities like cycling can help people cope with stress, build their self-confidence and form supportive friendships.
- Replacing motor vehicle trips with cycling trips reduces air pollution and helps decrease the number of premature deaths and hospitalizations. A study by Toronto Public Health found that air pollution associated with traffic contributes to about 440 premature deaths and 1,700 hospitalizations per year in the City of Toronto alone.⁴⁰

Ontario's health professionals have been pushing the active transportation agenda through the Ontario Ministry of Health Promotion, Ontario Health Units and the Ontario Healthy Communities Coalition. Active Transportation Committees, which bring together health units, transportation and community planners, cycling clubs, hiking clubs and community representatives are now working in concert to increase safe cycling opportunities in both rural and urban communities. At every community meeting held as part of the GBCyR project, Health Unit representatives were passionate about increasing cycling routes within their communities and supported the GBCyR concept because it would provide even more cycling options.

The Ontario Professional Planners Institute recognizes the need to "make non-motorized forms of travel a mainstay of daily life throughout Ontario communities" in its 2012 Call To Action. The health benefits of Active Transportation are described as follows:

³⁷ <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC1402378> Warburton, D. and Nicol, C. and Bredin S. Health benefits of Physical Activity: The Evidence. Canadian Medical Association Journal, 2006 March 14; 174(6): 801–809

³⁸ <https://www.oma.org/Resources/Documents/OMACyclingPa-per09-08-2011.pdf> Ontario Medical Association. Enhancing Cycling Safety in Ontario. 2011.

³⁹ <http://policybase.cma.ca/dbtw-wpd/Policy/pdf/PD09-04.pdf> Katzmarzyk PT, Gledhill N, Shephard RJ. The Economic Burden of Physical Inactivity in Canada. CMAJ (2000)163(11): 1435-40, as cited in Canadian Medical Association, "Active Transportation," (2009)

⁴⁰ http://www.toronto.ca/health/hphe/pdf/air_pollution_burden.pdf Toronto Public Health, Air Pollution Burden of Illness from Traffic in Toronto: Problems and Solutions. 2007

*Walking and cycling are excellent forms of exercise that can be incorporated into daily routines, contributing to recommended physical activity levels and combating the rise in obesity and the incidence of diabetes. Active transportation can also contribute to improved mental health by increasing opportunities for social interaction, which can reduce social isolation.*⁴¹

⁴¹ <http://ontarioplanners.ca/PDF/Healthy-Communities/2012/Planning-and-Implementing-Active-Transportation-in.aspx>
Ontario Professional Planners Institute, Healthy Communities and Planning for Active Transportation. Planning and Implementing Active Transportation in Ontario Communities, A Call to Action, June 21, 2012

2 Route Development Cost Assessment

Resolution of the route between Sudbury and Parry Sound will follow a meeting between representatives of the new governing organization and the Minister of Transportation regarding cycling infrastructure and the Highway 69 four-lane project.

In this section, cost estimates have been prepared for the 800 km portion of the route that is implementation-ready (approximately 675 km core route A and 125 km additional core route B's for an 800 km route from Parry Sound south around Georgian Bay to Sudbury), with some consideration given to the full 1,000 km route.^{42, 43}

It is estimated that launching the 800 km route will take three to five years, shorter if there is excellent support from stakeholders and funding is readily secured, based on the experience of the Waterfront Regeneration Trust with launching new long-distance cycling routes in Ontario.⁴⁴ It could take longer to complete the Sudbury-Parry Sound portion of the route because the timing is contingent on completion of the final segment of Highway 69-four lane project, which is scheduled to begin in 2016.

We have projected a range of costs for the four main components for developing the GBCyR: project management, infrastructure, signage and marketing. More detailed breakdowns and assumptions are provided for each task in the remainder of this section.

**Summary of GBCyR Development Cost Estimates
Over The First Five Years of the Project**

Component	Full Route (1,000 km)	Implementation Ready Route (800 km)
Management	\$444,000 to \$536,000	\$432,000 to \$524,000
Signage	\$144,000	\$115,000
Marketing	\$137,000 to \$218,000	\$123,500 to \$191,750
Infrastructure	Unknown	\$0
TOTAL	\$725,000 to \$898,000 plus infrastructure for gaps	\$670,500 to \$830,750

⁴² 800 km: Core Route A (Parry Sound to Sudbury - 672 km) + Core Route B (Muskoka Honey Harbour - 62 km) + Core Route B (Manitoulin - 83 km) = 817 km, rounded to 800 km

1,000 km: Core Route A (Parry Sound to Sudbury - 672 km) + Core Route B (Muskoka Honey Harbour - 62 km) + Core Route B (Manitoulin - 83 km) + an estimate of 175 km using unknown infrastructure from Sudbury to Parry Sound = 1,025 km, rounded to 1,000 km.

⁴³ References to route calculations can be found at

- GBCyR Parry Sound to Sudbury, core route A (approximately 672 km) www.mapmyride.com/routes/view/355043529
- Muskoka Honey Harbour core route B (approximately 62 km) www.mapmyride.com/routes/view/355150241
- Manitoulin core route B short (approximately 83 km) www.mapmyride.com/routes/view/355154443
- Manitoulin core route B long (approximately 161 km) www.mapmyride.com/routes/view/355154055
- GBCyR full circuit, without core route B's (approximately 900km) www.mapmyride.com/routes/view/355095817

⁴⁴ Interview with M. Koehler, Executive Director, Waterfront Regeneration Trust, January 2014

2.1 Management Component

Establishing a clearly defined management and governance structure at the outset will be a key component for successfully developing the GBCyR. Project funding will be more easily attained with a structure in place and further route development and implementation can proceed.

There are several options to consider each of which would have different costs.

1. Retain an organization with experience developing cycling or recreational routes and trail systems
2. Retain an organization with project management experience
3. Hire an experienced individual(s)
4. Hire a series of specialized consultants/businesses for each component of route development

All options would require and benefit from a governing organization comprised of a group of interested cross regional stakeholders to act together in the capacity of either a steering or advisory committee, board of directors or working group. Members of this type of group would be retained as volunteers.

Under the direction of the governing organization, paid project management responsibilities would include:

Final management costs will depend on which of the four project management options is adopted. Based on the experience of the Waterfront Regeneration Trust and Transportation Options, developing a route the scale of GBCyR would take 3 to 5 years for the Implementation-Ready Route, with more intense staff and project management required in the first 2 years. Based on the experience of these organizations (option 1 or 2, above), approximate annual costs are estimated as follows:

1. Dedicated staff/s person to coordinate project is estimated at \$75,000 per year for the first 2 years. After 2 years it may be possible to reduce staff costs depending on an estimate of time, tasks and coordination required. For years 3 to 5, staff time may be estimated at 70% of previous annual total, reducing amount to \$52,500 annually.
2. Staff and project management by an experienced organization would cost an additional \$25,000 annually. For years 3 to 5, project management time may be estimated at 70% of previous annual total, reducing amount to \$17,500 annually.
3. Staff and management travel costs for a variety of community and stakeholder meetings and marketing related activities should be accounted for and are estimated at \$12,000 for the 800 km route to \$15,000 annually for the 1,000 km route, for both the first 2 years, and reduced by 70% for subsequent years.
4. Additional project-related costs including general administration, office expenses, insurance and accounting could be: stand-alone costs or if GBCyR is fortunate, they may be covered by an in-kind donation from a partner or contributed by the managing organization. Administration costs could range from 10% to 30% of the annual project budget, and are estimated to be between \$11,000 to \$34,000 annually.

The project management cost estimate ranges are summarized in the following table.

GBCyR Route Development
Management Cost Estimate For 1,000 km and 800 km Route

Years	Full Route (1,000 km)		Implementation Ready Route (800 km)	
	Annual Cost	Total	Annual Cost	Total
1 & 2	\$126,000 to \$149,000	\$252,000 to \$298,000	\$123,000 to \$146,000	\$246,000 to \$292,000
3 to 5	\$96,000 to \$119,000	\$192,000 to \$238,000	\$93,000 to \$116,000	\$186,000 to \$232,000
TOTAL		\$444,000 to \$536,000		\$432,000 to \$524,000

2.2 Signage Component

Signage is an important component of developing the GBCyR as it will serve important roles for wayfinding and marketing purposes. For the purpose of this cost estimate, only designation, directional and information trailhead signs will be considered as they are of primary importance to establishing and implementing a route. The costs associated with pavement markings, regulatory, warning, and additional information and interpretive signs while of value can be considered at a later date. For further investigation into the different types of signs, their different purposes and recommended applications a useful signage design and guideline publication has been created for the Waterfront Trail and can be accessed online.⁴⁵

In order to accurately determine signage costs, a GBCyR signage strategy and a route-specific signage audit should be conducted to cover route-specific variables. Without this information, a sign cost range can be estimated three ways:

1. Using a cost multiplier to calculate the number of urban kilometers versus rural kilometers.⁴⁶

Urban: To supply and install signs for cycling routes in urban areas every 200 to 300 meters on both sides of the road and at key intersections is estimated to cost between \$2,000 to \$2,300 per km.

Rural: To supply and install signs for cycling routes in rural areas, at 1 per kilometer intervals, costs approximately \$200 per km.

2. Base cost estimates on sign unit costs and associated costs

The following table provides approximate unit costs for each of the items that would be involved in signing the GBCyR.

⁴⁵ <http://www.waterfronttrail.org/partner-resource-center/publications> Waterfront Regeneration Trust, Design, Signage and Maintenance Guidelines: Waterfront Trail 2007 Update, Prepared by Marshall Maclin Monaghan.

⁴⁶ http://www.whitby.ca/en/resources/pw-report_cyclingandleisuretrailplan-finalreport.pdf Town of Whitby Cycling and Leisure Trails Plan 2010 <http://www.sault-canada.com/en/resourcesGeneral/FINALLakeHuronBikeRouteReport.pdf> Lake Huron North Channel Cycling Route Study 2013

Cost Estimates for Bi-Directional Bicycle Route Signage⁴⁷

Item	Description	Unit	Approximate Unit Price / Cost Range
Signage Audit	To fully assess the number of and locations for designation and directional signs, a report containing detailed mapping and GPS coordinates needs to be completed by trained project staff or staff managed volunteers.	800 km	\$11,000
		1,000 km	\$14,000
Design Services	Design services range in cost depending on amount of design work required. Some sign printing companies have in-house design staff. This estimate assumes trail branding is already complete (see Marketing Component).	\$40 to \$100 per hr	\$750
Sign Printing and Fabrication	Basic sign - 450mmx450mm/18" standard recommended	per sign	\$20 to \$30
	Smaller signs (flashings / blazes) - 155mm/6" standard	per sign	\$9 to \$12
	Larger trailhead signs - 1524 mm x 914.40 mm/60" x 36"	per sign	\$1,500 to \$3,200
Sign Installation	Locates	per sign	\$188
	Post for basic and smaller sign installation, when stand-alone wood post required	per post	\$15
	Sign installation on pre-existing post dependent on road jurisdiction, municipal or regional staff time	per sign	Jurisdiction
	Trailhead sign installation	per sign	\$260
Annual Inspection & Sign Replacement	Check all signs annually		Volunteer or staff time
	Replace signs every 10 years		Repeat all associated costs

3. Estimate based on experience and the following information from signing other cycling routes already developed or under development around Ontario

- Design guidelines call for signs to be installed every 1 km in rural areas, but apart from turns and key decision points, rural areas cycling signs can be placed further apart.⁴⁸
- At each turn, 6 signs with extra directional arrows added are needed to assist cyclists coming from each direction.

⁴⁷ <http://www.waterfronttrail.org/partner-resource-center/publications> Waterfront Regeneration Trust, Design, Signage and Maintenance Guidelines: Waterfront Trail 2007 Update, Prepared by Marshall Maclin Monaghan.

⁴⁸ Interview with M. Koehler, Executive Director, Waterfront Regeneration Trust, January 2014

- Sign installation is generally provided by the municipality or region that has jurisdiction over the road. This cost is provided as in-kind support and is a contribution that municipalities and regions incorporate into their road works budgets and justify based on the health, transportation, tourism and economic benefits associated with the development of a cycling route. Based on consultation with municipalities and regions along the GBCyR, many indicated that this may be a possibility for further consideration.

Bi-Directional Sign Budget for Waterfront Regeneration Trust Cycle Route Projects

Cycling Route	Route Length	Budget per km	Initial Trail Development Sign Budget	Limitations
Lake Erie Waterfront Trail	620 km	\$65	\$40,000	Signs installed only every 5 km
Greenbelt Route	450 km	\$90	\$40,000	Estimate only, signage audit still to be completed

We recommend that GBCyR signage cost estimates should be based on the experience of other Ontario cycling routes (estimate option 3). As its experience with trails continues to increase, the Waterfront Regeneration Trust has come to believe that rural signage should be installed a minimum of 2.5 km apart from the outset.⁴⁹ Based on the Lake Erie project, this means that the signage budget should be doubled to \$130 per km for design, fabrication, printing and delivery of signs to municipalities/regions, which would install the signs. Using this rate the total GBCyR signage costs can be estimated for the full route and Parry Sound to Sudbury portion as follows:

GBCyR Bi-Directional Signage Cost Estimate

	Approximate Route Length	Budget per km	Sign Cost Estimate	Signage Audit Cost	Total
Full Route	1,000 km	\$130	\$130,000	\$14,000	\$144,000
Implementation Ready Route	800 km	\$130	\$104,000	\$11,000	\$115,000

For comparison purposes, using the rural/urban estimate approach described in option 1, the cost to sign the 330 km Lake Huron North Channel Cycling Route was estimated to be \$204,000 or \$618 per km based on 1 sign per km in rural areas. Using this rate, the cost to sign the 1000 km GBCyR route would be \$556,000 and the cost for the 800 km Parry Sound to Sudbury portion would be \$494,400.

2.3 Marketing Component

Marketing is the final component of route development, and the following marketing tasks should be undertaken to prepare for launching the GBCyR as an iconic cycling route. The costs described below and summarized in the final table are based on the 800 km portion of the route. They can be multiplied by 1.125 to encompass the entire 1000 route (this has been done for the summary table in the introduction to the Cost Assessment).

⁴⁹ Interview with M. Koehler, Executive Director, Waterfront Regeneration Trust, January 2014

- **Establish Brand Identity**

A visual brand identity must be established before any marketing activity begins, including sign design. Two options can be considered with varying approximate cost estimates and/or negotiations required:

1. A professionally-led branding exercise should be undertaken to finalize the route name, create a stand-alone original logo and all other marketing materials related to brand identity. Cost estimates to undertake a brand identity exercise range from \$5,000 to \$15,000.
2. Assume pre-existing trail brand identity to apply to the GBCyR. While this would require negotiations with the branded organizations and jurisdictions responsible for trail or route, there are a number of advantages that would be realized. Association with two existing brand identities could be considered when the governance model for GBCyR is developed in Stage 3 of this project: Waterfront Trail and the Georgian Bay Coastal Route. If the GBCyR is assumed under an existing brand, the cost to develop a brand identity could be negligible.

- **Map the Route**

High quality print maps have proven to be very important to any trail or route user. While many people use smart phones to access route information, print maps are still essential, particularly in rural and remote areas where cell phone coverage is not reliable. Mapping costs vary widely depending on the quality of the map making and format. Experience from development of other cycling routes in Ontario shows that print mapping for a long route, such as the GBCyR, is better in a small scaled PDF format rather than in a foldout traditional map format. The cost for this type of mapping, using cost estimates from and similar to that of the Waterfront Trail will depend on the number of maps and map scale required.

- *Small scale printable PDF maps* – Maps for the Waterfront Trail cost approximately \$700 per page. Based on similar mapping, it is conservatively estimated that 35-45 maps would need to be created for the 800 km GBCyR from Parry Sound south around Georgian Bay to Sudbury. The total estimated cost for creating this series of 35 to 45 maps would be \$24,500 - \$31,500. Approximately 45 to 55 map pages would be required for a full 1,000 km route, the cost estimate for creating this series would be between \$31,500 – \$38,500.
- *Scalable digital map* – A route map that can be accessed on-line and featured on the route webpage would be an important feature and valuable source of information that can be updated with ease over time. Using free mapping tools such as Google Maps, RidewithGPS or Mapmyride would require only staff time and coordination.

- **Website**

It is important to have a well-designed and easily navigable website for prospective and experienced route users to determine: exact routing and supporting communities, attractions, tourism businesses and services nearby.

- The GBCyR website should have the capability to: grow with future trail development, serve as a primary source of information for route users, and provide accurate community and route information and maps. Approximately \$5,000 should be allocated for initial website design and development, plus \$400 should be allocated annually for web hosting and other annual fees, for a total of \$7,000 over the first five years of the project.
- If GBCyR shares brand identity with the Waterfront Trail or another organization, costs would be similar to the previous. However, aligning with an existing website that has the capabilities to expand to incorporate additional information on a new route could prove advantageous.
- After the website is developed staff time should be allocated to creating pages and platforms on other popular social media and websites to augment on-line presence of the GBCyR

- Ongoing website/social media maintenance can be completed by the staff person or organization overseeing route development. Keeping the site current can take a considerable amount of staff time which should be allocated accordingly.

- **Mobile App**

The development of a downloadable app that can be used on mobile devices is a consideration that needs to be weighed based on cost and anticipated route development budget plus the needs and preferences of cyclists that will use the route.

A native app that can be downloaded from the App Store can be prohibitively expensive and easily cost up to \$40,000 to develop. Research done by the Waterfront Regeneration Trust suggests that a mobile friendly website, with responsive design features is more cost-effective than an app because there would be only one digital entity to manage. A mobile friendly responsive designed website would enable the route user to equally access all information via mobile device or desktop, from home or while using route.

- As a result of this research a mobile app is not recommended for GBCyR at this time.

- **Printed Marketing Collateral**

These costs vary depending on size and style.

- Design costs for printed marketing collateral depends on designers time required, pre-design information provided and number of draft revisions required. Designers generally charge between \$40 to \$100 per hour. Estimate 10 hours at \$75 per hour, \$750 for a simple two sided card.
- A simple two sided full-colour card costs approximately \$1,000 to print 10,000 copies. A 12 page full colour, 8.5" by 11" brochure costs range depending on quantity, paper selected: 5,000 copies for \$2,300; 10,000 copies for \$3,200; 25,000 copies for \$5,900 (prices include tax, are subject to change and may vary considerably between printers.)
- The design and printing of an initial and simple two sided card should be budgeted for at approximately \$2,000 and printed when the GBCyR is launched. Additional budget would allow for subsequent reprints or used to print a larger quantity initially.
- Brochure distribution should also be considered in overall marketing costs. The route development staff person or organization should be responsible for brochure distribution. The cost of mailing or delivery to tourist information centres could be estimated at \$500 annually.

- **Advertising and Promotions**

There are unlimited advertising and promotions to consider. A budget line item that will ensure that some of these marketing expenses are covered is suggested to assist with initial route launch and exposure.

- Bike show and outdoor consumer show exhibits are an excellent way to promote the route and distribute brochures. To secure a booth and provide staff at a major bicycle or outdoor adventure type of show costs approximately \$5,000 per show. To launch the route and increase route exposure it is recommended that 2 shows be attended at a total cost of \$10,000.
- Advertising in targeted magazines can cost on average \$2,000 per half page ad, but varies widely. On-line advertising including Facebook and Google ads have been effective in trail promotion and increasing exposure. A marketing budget allowance of \$10,000 per year, for two subsequent years once route is launched is recommended for a total of \$20,000.

Other Marketing Related Route Development Costs

- **Test Ride of Route**

An end-to-end pilot test ride has proven to be useful and beneficial prior to the launch of new cross-regional cycle routes in Ontario. These rides effectively test the maps, provide a mobile workshop platform, unveil the signage program and build political and staff support. They can also assist with initial marketing if media guests are included to generate media coverage.

- Based on costs for similar types of test rides \$27,250 to \$34,000 should be allocated to this expense.⁵⁰

- **Ontario By Bike Network and Workshops**

A number of regions on the GBCyR route have already hosted Ontario By Bike (formerly Welcome Cyclists) workshops. As a result they have tourism businesses and locations certified as bicycle-friendly and are benefitting from the developmental and promotional assistance that comes with Ontario By Bike Network participation.

Simcoe County, Grey County and Manitoulin District are already a part of the Ontario By Bike Network. The cost to expand to the remaining regions will depend on the number of workshops required to reach the maximum number of participants and an estimate of on-going administration required to support the region's on-going participation in Network.

- To expand the program to include the entire GBCyR including: Bruce County, Sudbury District, City of Greater Sudbury, Parry Sound District and Township of Georgian Bay (only) in District of Muskoka would be approximately \$26,000. These costs could be borne by the regions or tourism partners (as was the case for those already participating) or be allocated to the GBCyR budget.

- **GBCyR Launch Event**

A launch event is important to officially launch the Route, increase exposure and promote the Route. Events take significant staff and marketing resources to ensure success, and costs are dependent on a number of related factors that also include targeted event participant size.

- Trail head ribbon cutting style of events can cost from \$1,000 to \$5,000 and would depend on municipal and regional partners' participation.
- A multi-day touring event open to the public could cost between \$34,000 and \$42,500⁵¹ in event expenses alone. This figure does not include staff time to coordinate nor a marketing budget, both essential for the event to be successful.

⁵⁰ This figure includes end to end travel, accommodations and meals for staff and expert panel guests, volunteer support guides; support vehicle rental and fuel (2 required), it does not include staff preparation time. This conservative cost estimate is based on costs for similar test rides done for Lake Erie and estimated for Greenbelt route and conversation with M. Koehler, Waterfront Regeneration Trust.

⁵¹ This figure includes: end to end travel, accommodations and meals for staff, volunteer support guides; support vehicle rental and fuel (van and truck); largest fees are campgrounds, shower rentals, 1 included meal; event insurance, honorary guests/media, it does not include staff prep time or marketing of event. This conservative cost estimate is based on costs for similar test rides done for Lake Erie and estimated for Greenbelt route and conversation with M. Koehler, Waterfront Regeneration Trust.

• **Tracking System to Measure Tourism and Economic Benefits of GBCyR**

Market research would be invaluable to measure the tourism and economic benefits of the GBCyR. The information would be useful to garner more community and business support, secure and maintain sponsors and demonstrate accountability to project partners. A tracking system might include information such as:

- Measure volume of riders at different sections of the route at key time periods in the cycling season,
- Measure of overnight stays by GBCyR cyclists at paid accommodation,
- Average expenditures for riders of a variety of trip types, (day, weekend and week long trips),
- Profile of riders, brand awareness and media channels used.

It would be important to conduct a pre-launch or early measure as a benchmark and then a longitudinal study every other year. Funding opportunities to support marketing research exist through RTOs, Ontario Trillium Foundation, community clubs and educational institutions.

Based on costs for similar tourism tracking projects in the Georgian Bay region, the cost to set up and pilot the tracking system would range from \$15,000 to \$25,000.

GBCyR Marketing Component Budget Allocation for First 5 Years

Marketing Item	Recommended Budget Allocation 1,000 km Route	Recommended Budget Allocation 800 km Route	Assumptions
Brand Identity	\$0 to \$10,000	\$0 to \$10,000	Depends on option chosen, same regardless of route length
Route Mapping	\$31,500 to \$38,500	\$24,500 to \$31,500	35 to 55 printed full colour PDF maps, depends on route length
Website	\$7,000	\$7,000	5 year timeframe same regardless of route length
Mobile App			Not recommended
Printed Marketing Collateral	\$2,500 to \$5,000	\$2,500 to \$5,000	Initial first run, 2 sided card, same regardless of route length
Advertising and Promotions	\$20,000 to \$30,000	\$20,000 to \$30,000	Shows, printed and web based ads, same regardless of route length
Other Marketing Costs			
Test Ride of Route	\$34,000	\$27,250	Based on similar test ride event expenses
Ontario By Bike Network and Workshops	\$26,000	\$26,000	Network expansion and workshops only required for Bruce County, Sudbury District, City of Greater Sudbury, Parry Sound District and limited to the Township of Georgian Bay in District of Muskoka

GBCyR Marketing Component Budget Allocation for First 5 Years

Marketing Item	Recommended Budget Allocation 1,000 km Route	Recommended Budget Allocation 800 km Route	Assumptions
GBCyR Launch Event	\$1,000 to \$42,500 +	\$1,000 to \$30,000 +	Dependent on option selected. Multi-day touring event expenses do not include staff coordination time or marketing cost estimates.
Tracking system to measure tourism & economic benefits	\$15,000 to \$25,000	\$15,000 to \$25,000	Based on tracking projects in other jurisdictions.
TOTAL	\$137,000 to \$218,000	\$123,500 to \$191,750	

2.4 Infrastructure Component

Immediate infrastructure improvements are not required for the 800 km implementation-ready part of the route. The GBCyR will make use of a combination of existing roadways and designated multi-use trails. Some municipalities have their own plans for improvements in the next few years, but these are unrelated to the GBCyR project. As found with similar route development projects, once designated as cycling route, municipalities or regional roads are more likely to be considered for improved cycling facilities in long range roadwork and transportation plans. Where possible and under the direction of these municipal and regional stakeholders, the recommended route has incorporated future roadwork plans in the route selection process.

Resolution of the route between Sudbury and Parry Sound will follow a meeting between representatives of the new governing organization and the Minister of Transportation regarding cycling infrastructure and the Highway 69 four-lane project.

The following cost estimate table has been prepared to put the cycling infrastructure costs for the gap into context. It is important to note that costs will vary from project to project depending on geographical factors including: build location, urban versus rural settings, price quotes from various road work departments and contractors, economies of scale and scope of project. In addition to the costs described in the table, other costs may also come into play, such as: property acquisitions, utility relocations, planning, design, environmental assessments, maintenance, utilities and taxes.

Cost Estimates for Bicycle Route Infrastructure⁵²

Item	Description	Unit	Approximate Unit Price / Cost Range
Bike Lanes New Construction	New construction as part of road widening and new road construction for paved shoulders	per km	\$200,000 to \$300,000
	Retrofitting / widening existing road for paved shoulders	per km	\$110,000 to \$700,000
Bike Lanes Retrofit or Resurface	Resurface / paint bike lanes	per km	\$10,000
	Retrofit or reconfigure existing lanes to provide bike lanes	per km	\$23,000
	Pave shoulders / road resurfacing	per km	\$75,000
	Granular shoulder sealing	per km	\$3,000
Off-Road Trails	New multi-use asphalt	per km	\$150,000 to \$250,000
	New multi-use granular (3m)	per km	\$105,000 to \$150,000
	Upgrading granular to asphalt	per km	\$100,000
	Upgrading existing asphalt surface/resurface	per km	\$70,000
Crossings	Grade-separated - freeway bridge/overpass	each	\$2M to \$8M
	Underpasses	each	\$2M to \$11 M
	At grade interchanges, roadway trail crossing, bikeway intersections	each	\$12,000 to \$65,000

It should be noted that new roadway projects can cost tens of millions of dollars to construct, and in this context bicycle infrastructure projects and facilities are extremely low-cost. Incorporating bicycle infrastructure when planning roadway development and upgrading is important as studies have found cyclists will go out of their way to use bicycle infrastructure. This highlights the importance of developing sufficient facilities.⁵³

⁵² Costs for this table were compiled from the following sources

- http://www.whitby.ca/en/resources/pw-report_cyclingandleisuretrailplan-finalreport.pdf Town of Whitby Cycling and Leisure Trails Plan, June 2010
- <https://www.ajax.ca/en/doingbusinessinajax/resources/ajaxpedestrianbicyclenmasterplanfinalreport.pdf> Town of Ajax, Walkable and Bikeable Ajax: The Ajax Pedestrian and Bicycle Master Plan. March 2010.
- City of Toronto cost estimates for urban area infrastructure prepared by MMM 2011
- <http://www.hamilton.ca/CityDepartments/PublicWorks/CommunityServicesRelatedPoliciesAndGuidelines/Cycling/shiftinggears.htm> Hamilton's Cycling Master Plan, 2009
- <http://www.walkinginfo.org/download/PedBikeCosts.pdf> Costs for Pedestrian and Bicyclist Infrastructure Improvements: A Resource for Researchers, Engineers, Planners, and the General Public, UNC Highway Safety. 2013
- Research Centre, *Prepared for the Federal Highway Administration and supported by the Robert Wood Johnson Foundation through its Active Living Research program*, October, 2013
- <http://www.vtpi.org/nmt-tdm.pdf> Victoria Transport Policy Institute. Evaluating Active Transport Benefits and Costs: Guide to Valuing Walking and Cycling Improvements and Encouragement Programs, 2013
- <http://www.sault-canada.com/en/resourcesGeneral/FINALLakeHuronBikeRouteReport.pdf> Lake Huron North Channel Cycling Route Study Final Report, 2013

⁵³ <http://www.waterfronttrail.org/partner-resource-center/publications> Waterfront Regeneration Trust Design, Signage and Maintenance Guidelines: Waterfront Trail 2007 Update, Prepared by Marshall Maclin Monaghan.

As with any type of road and bicycle infrastructure maintenance, costs should also be considered and budgeted.

Maintenance estimates for the following road or trail facilities are:⁵⁴

- On-road between \$5,000 and \$9,000 km/year,
- Mature multi-use urban trail \$1,000 to \$4,000 km/year, and
- Rural multi-use trail \$300 to \$800 km/year.

⁵⁴ <http://www.sault-canada.com/en/resourcesGeneral/FINALLakeHuronBikeRouteReport.pdf> Lake Huron North Channel Cycling Route Study Final Report, 2013)

3 Developing Tourism Performance Measures for GBCyR

Providing tourism performance measures for visitor numbers, spending and behaviour for a project of this scope and scale can be challenging because visitor tracking does not take place consistently along the geography of the route. In 2008 and 2009, the Georgian Bay Destination Development Partnership (GBDDP) undertook visitor tracking at approximately 16 locations along the Georgian Bay Coastal Route, sampling at visitor centres, attractions and parks. In both years, road cycling was identified as one of the top three experiences by 5% of visitors interviewed. Visitor tracking has not taken place since then.

As the GBCyR moves forward, it would be useful to stay closely connected with the GBDDP and RTOs to ensure that data relevant to measuring GBDDP performance is collected as part of future visitor tracking initiatives. More information about a GBCyR visitor tracking program and associated costs is included in Section 2.3 Marketing Component.

High level visitor statistics, identifying the number of visitors who cycle as part of their vacation, are summarized in the Ontario Ministry of Tourism Culture and Sport Regional Tourism Profiles (RTPs) for the Regional Tourism Areas (RTOs) by the based on the annual Travel Survey of Resident Canadians. These data have three major drawbacks for tracking cycle tourism for the GBCyR.

- It takes several years for data to be processed. In 2014, the most recent data available is for 2011.
- The methodology was changed in 2011, thus the 2011 RTP statistics are not comparable to previous years.
- The RTP results represents the entire RTO and GBCyR corridor data cannot be separated.

As GBCyR moves forward, performance measures that are associated with increased visitor spending, increased visitation, increased investment and improved customer experiences, such as the following can be benchmarked, monitored and reported on:

Community Support

- Number of agreements to participate (MOUs) received from communities along the route
- Amount of partner funding and route investment attained
- Strength and long-term commitment of governance organization
- Number of community infrastructure improvement projects positively impacting cyclists, scheduled or completed on route

Provincial Support

- Commitment of MTO to assist in improving infrastructure and closing gaps on roads under their jurisdiction
- Kilometers of provincial road improvements along the route

Community Implementation

- Number of route signs delivered
- Number of route signs installed

Marketing Success

- Number of marketing brochures or cards printed and distributed
- Number of communities actively promoting route in digital and print formats
- Web hits and analytics for dedicated route web site
- Number of route maps viewed and downloaded
- Social media activities (Facebook likes, Instagrams etc)
- Number of media articles generated

- Exposure estimates from all marketing related activities

Cyclist Participation

- Number of cyclists participating in launch events
- Number of businesses and regions participating in Ontario By Bike Network
- Anecdotal comments solicited and received back from cyclists using route
- Placement of pneumatic tubes or other measuring device to capture number of cyclists using route at various locations

Community Outreach

- Community stakeholder and partner review of tourism benefits attributable to GBCyR
- Measures of cyclists visiting at key major attractions such as SMATH, Discovery Harbour, Ontario Parks, National Parks, Chi Cheemaun ferry, Science North etc.

Ongoing visitor tracking by the future GBCyR organization alone or in association with another tourism organization, would be needed to fully assess and measure the tourism and economic benefits of the GBCyR.