

Prince Edward Island Confederation Trail Phase II Development

Final Report

Submitted to

Tourism Industry Association of Prince Edward Island

by



in association with

Daniel K. Glenn Ltd.

2L Media Group

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Baker Consulting Inc., in association with Daniel K. Glenn Ltd. and 2L media group, is pleased to submit this Final Report for Phase II Development of the Confederation Trail in Prince Edward Island.

Executive Summary

In order to put forward strategic recommendations for the Phase II Development of the Confederation Trail, the Baker Consulting team completed a comprehensive situation analysis. As stated in the scope of work, the situation analysis focused on: Infrastructure, Programming, Branding, Packaging, and Marketing.

The collection and analysis of background information was critical to propose sound and achievable recommendations. For this project, six methods of data collection were utilized and are detailed in the body of the report.

Some interesting facts that were discovered include that, for 26 million Active American leisure travelers, heritage is the #1 motivator and soft adventure #2. For 14 million active Canadian vacationers, the motivators are reversed, and heritage is somewhat less important. As far as visitors to Prince Edward Island are concerned, the tale is told in the last available Exit Survey, showing that in 2003, soft adventure was the #1 activity behind the catch-all of “sightseeing”.

Looking at cycling tourism, it is worth noting that bicycle retail and tourism in Ontario are worth at least \$150 million a year. In Quebec, statistics show that bicycle tourists spent, in 2002, an average of \$112 per day as opposed to other tourists who spend \$52 per day. A study of cycle tourism in Maine revealed that many cyclists will travel further distances to take advantage of shared paths. More detailed findings can be found in the body of the report.

In Canada, trails of importance include La Route verte in Quebec, Lake Ontario’s Waterfront Trail and Greenway in Ontario, and Le P’tit Train du Nord in Quebec. Some internationally important cycling networks are located in Denmark, the UK, Holland, in addition to numerous trails in the US. Some commonalities include the services offered to cyclists along the trail, paved routes, and extensive networks of trails. Some also feature certification systems for tourism operators. More details about the analysis of background information can be found in the body of the report.

By design, grass roots community volition has always been the driver for trail development on Prince Edward Island. The implementation strategy proposed for the Phase II Development of Confederation Trail is based on seven domains of trail enhancement, each equally important.

They are discussed according to three priorities, or three phases: 1) Set images and standards; 2) Build out and promote; 3) Expand and package. The priorities for each domain of trail enhancement are resumed as follows:

	PHASE I Set Image & Standards	PHASE II Build Out and Promote	PHASE III Expand and Package
Community Support	<ul style="list-style-type: none"> ▪ Town Hall presentations to explain strategy to communities 	<ul style="list-style-type: none"> ▪ Provide Best Practice manuals to Communities ▪ Support establishment of coordinated shuttle service 	<ul style="list-style-type: none"> ▪ Enlist Trail Ambassadors ▪ Incorporate re-enactment community characters
Management	<ul style="list-style-type: none"> ▪ Confirm Island Trails as private sector management partner ▪ Enlist Development Officers ▪ Prepare Best Practices manual for maintenance: \$15,000 ▪ Adopt “0” tolerance for ATV use 	<ul style="list-style-type: none"> ▪ Establish liaison coordinator with DOT & PW and communities ▪ Obtain lease or title of lands for expansion 	<ul style="list-style-type: none"> ▪ Set certified standards for businesses ▪ Collect user data to monitor for success
Infrastructure	<ul style="list-style-type: none"> ▪ Install new trail warning signs ▪ Design kiosk standards ▪ Pave ‘Welcome Mats’ at road crossings to increase visibility ▪ Upgrade trailhead signs with new logo and info 	<ul style="list-style-type: none"> ▪ Install kiosk information signs ▪ Create major trailhead locations complete with parking, signs, washrooms, potable water ▪ Add more shelters ▪ Add more benches 	<ul style="list-style-type: none"> ▪ Construct tent platforms and washrooms in remote areas of trail ▪ Improve control gate designs ▪ Add 50mm trail topping to depth and widen to 3m standard
Aesthetic Quality	<ul style="list-style-type: none"> ▪ Prepare Best Practices manual for landscape views: \$30,000 	<ul style="list-style-type: none"> ▪ Establish 3 demonstration sections along trail to act as standards ▪ Improve Wood Islands trail edges 	<ul style="list-style-type: none"> ▪ Conduct workshop on landscape standards with work crews ▪ Implement landscape enhancements with work crews
Interpretation	<ul style="list-style-type: none"> ▪ Collect resource information ▪ Identify distinct character nodes ▪ Set standards for message delivery 	<ul style="list-style-type: none"> ▪ Write storylines for signs ▪ Translate ▪ Do graphic layouts in-house 	<ul style="list-style-type: none"> ▪ Fabricate signs and install ▪ Coordinate with PEI Agri-Tourism

Marketing	<ul style="list-style-type: none"> ▪ Introduce New Brand Image ▪ Tweak website and marketing materials ▪ Set TAC data requirements 	<ul style="list-style-type: none"> ▪ Establish snowmobile rally event ▪ Integrate with Coastal Drive Strategies ▪ Promote cycling ▪ Promote heritage roads ▪ Host regular trail events 	<ul style="list-style-type: none"> ▪ Establish major cycle event with qualified promoter and celebrity host /participant ▪ Package trail experiences
Expansion	<ul style="list-style-type: none"> ▪ Extend trail at Gateway Village with major trailhead ▪ Plan land lease / acquisition ▪ Co-plan route with Parks Canada ▪ Expansion at Cavendish 	<ul style="list-style-type: none"> ▪ Pave urban sections of trail ▪ Start North Shore expansion implementation ▪ Start Stratford – Wood Islands expansion ▪ Start North Cape – Tignish and Elmira – East Point Trails 	<ul style="list-style-type: none"> ▪ Pave road shoulders ▪ Create urban cycle lanes

The budget determined for the proposed three phase approach is detailed as:

	PHASE I	PHASE II	PHASE III	TOTAL
Community Support	\$5,000	\$7,500	\$25,000	\$37,500
Management	\$7,500		\$25,000	\$32,500
Infrastructure	\$263,100	\$482,500	\$940,000	\$1,685,600
Aesthetic Quality	\$30,000	\$80,000	\$753,000	\$863,000
Interpretation		\$185,000	\$300,000	\$485,000
Marketing	\$53,000	\$50,000	\$100,000	\$203,000
Expansion	\$7,500	\$2,500,000	TBD	\$2,507,500
TOTAL	\$366,100	\$3,305,000	\$2,143,000	\$5,814,100

1. Context

In order to put forward strategic recommendations for the Phase II Development of the Confederation Trail, the Baker Consulting team completed a comprehensive situation analysis. In general terms, the goal of the situation analysis was three-fold:

1. to identify “where are we today?”
2. to identify “where might we like to go?”; and
3. to identify key strengths and challenges that may help or hinder future success.

As stated in the scope of work, the situation analysis focuses on:

1. Infrastructure
2. Programming
3. Branding
4. Packaging
5. Marketing

In addition to recognizing that these categories are not mutually exclusive and that there is considerable interaction and interdependency between them, they also have to be examined as part of a larger context which includes:

1. Provincial branding and marketing strategy
2. National branding and marketing strategy
3. Island communities adjoining the Trail

2. Methodology

In order to propose sound and achievable recommendations, the collection and analysis of background information was critical. For this project, five methods of data collection were utilized in the context of the aforementioned categories of Infrastructure, Programming, Marketing, Branding and Packaging. The data collection process was designed to be incremental: background material sourced in hard copy and online was incorporated into discussion outlines for one-on-one interviews and focus groups, and then findings from this primary research work prompted searches for additional secondary data.

Environmental Scan

The systematic review and examination of external factors and trends helped to assess the market. The consultants looked at how similar products are being branded, programmed, packaged and marketed; how similar products are ensuring economic spin-offs for adjoining operators and communities; where the Tourism Advisory Council is taking provincial tourism strategy and how this relates to Confederation Trail; how Trail branding and marketing can fit Canada’s new national brand approach, *Keep Exploring*.

Literature and Document Review

Examination of provincial government literature and a variety of related studies gave the consultants a good feel for how the trail came to be, how it is marketed currently and where communities and stakeholders want it to go in future.

Site Assessment and Infrastructure Review

Tours included visits to higher standard and lesser quality infrastructure along the trail, allowing the team to get a clear understanding of the current situation and product offering.

Expert and Key Informant Interviews

Interviews were conducted with a variety of experts and key informants, who are listed in the Appendix of the Interim Report.

Focus Groups

Three focus groups were conducted in August, 2005 with key stakeholders representing government, trail community and tourism operators in western (Summerside), eastern (Montague) and central (Charlottetown) regions. Detailed findings of these discussions are included in the Appendix of the Interim Report.

Strategic Planning

From the interviews and focus groups emerged an analysis of strengths, weaknesses, opportunities and threats, and from this an expanded description of potential development opportunities. In September, 2005, a strategic planning session was conducted with members of the Steering Committee, where the Interim Report and SWOT analysis were reviewed. Each of the identified opportunities was discussed in some detail and assessed for feasibility. Strategic priorities were assigned and this report is the result.

3. Research and Key Findings

3.1 Environmental Scan

3.1.1 Soft Outdoor Adventure

The Canadian Tourism Commission categorizes Soft Outdoor Adventure participants as people who took part in two or more of the following activities:

- | | |
|--|----------------------|
| <u>Recreational biking</u> | Horseback riding |
| <u>Biking as an overnight touring trip</u> | Hot air ballooning |
| Motorcycling | Cross-country skiing |
| Kayaking or canoeing | Downhill skiing |
| Motor boating | Snowboarding |
| Sailing, wind surfing | Snowmobiling |
| <u>Hiking/backpacking</u> | Hunting/fishing |

In order to assess the size of the market interested in product offering such as the Confederation Trail, it is interesting to note the following data:

***Market Size, Demographics and Spending*¹**

- Approximately 1-in-14 of all overnight person visits made by Canadians (or 5.0 million person visits) practiced one of the above mentioned activities during they travels; while the ratio increases to 1-in-10 for American visitors to Canada in 2001.
- The Soft Outdoor Adventure segment attracts equal numbers of male and female Canadian travellers whose average age is 39.2. Twenty-six percent (26%) have a university degree with an average income of \$58,200.
- The American Soft Outdoor Adventure segment comprises slightly more males than females and the average age is also slightly higher at 44.1. Thirty five percent have a university degree and the average income is \$71,000.
- Of the \$19.4 billion spent by Canadians taking overnight trips in Canada during 2001, those who took part in Soft Outdoor Adventure activities spent a total of \$1,176 million. The American Soft Outdoor Adventurers contributed over one billion dollars to tourism businesses in Canada in 2001.

Market Segments Overlap

There exists an overlap of interest within the different Canadian market segments. This gives indication of packaging possibilities with other non-adventure related activities. The Soft Outdoor Adventurers (those who practice one of the activities above) also have an interest in:

- 65% is interested in winter activities, with 60% having an interest in alpine skiing;
- 40% is also interested in heritage;
- 39% in wine/culinary;
- 38% in visual/arts; and
- 34% is also interested in performing arts.

The American soft outdoor adventure segment follows almost the same pattern as the Canadian segment with the only difference being a tie in interest in heritage, performing arts and wine/culinary.

¹ Canada Tourism Commission: *Activity-based Tourism Segments in Canada and the USA: An Overview – A Special Analysis of the Travel Activities and Motivation Survey (TAMS), 2003.*

Where Canadian Tourists Live and Where They Go

Demand for soft outdoor adventure products in Canada, according to residency, comes primarily from:

- Ontario market (34%), although, their preference lies in culture and heritage products (soft adventure activities come in seventh position);
- Quebec (28%), soft adventure is the number one choice of activity in that market.

Where American Tourists Live and Where They Go

American leisure tourists with recent Canadian travel experiences are most apt to have visited the following provinces and regions:

- Ontario – 55%
- Atlantic Canada – 12%

Atlantic Canada attracts disproportionately high levels of Americans in the Heritage, Performing Arts, Visual Arts and Wine/Culinary segments.

3.1.2 Confederation Trail Data

In the “North Shore Trail Extension Plan” prepared by the firm CBCL Limited, a summary of Confederation Trail Statistics is presented. The data was captured from visitor reports prepared by the Department of Tourism for Prince Edward Island for the years 2002 and 2003. The table is also presented here as it offers interesting data:

Variable	2002	2003
Number of Visitors	1.068 million	1.038 million
Majority of visitors were from	Ontario	Ontario
Used Confederation Trail	20%	17%
Cyclists	51%	63%
Hikers	38%	35%
Peak Season Use (July-August)	62	55
Late Shoulder Season	28	20
Early Shoulder Season	18	17
Visitors age 40 yrs or older	78	77
Visitors Group Size of 2 or less	68	72
Sightseeing	92	90
Visiting Beaches	82	88

Craft/Souvenir Shopping	81	78
Visiting National Parks	76	70
Lobster Suppers	61	63
Historical/Cultural Attractions	65	51
Visiting Anne Attractions	58	49
“Just to see PEI”	45	46
Hiking	42	41
Overnight in Charlottetown	37	37
Overnight in Cavendish	25	20

*Confederation Trail Users Profile*²

2003	
Age:	
< 40 years	23%
40 – 59 years	48%
60 years & up	29%
Party Composition:	
Singles	5%
Couples/Adults	72%
Families	23%
Mean Party Size	2.8
Work:	
Full time	54%
Part time	7%
Retired	28%
Other	11%
Income:	
< \$35,000	8%
\$35,000 - \$50,000	14%
> \$50,000	78%
Status:	
First time	55%
Repeat	45%

² Confederation Trail Visitors Report, PEI Department of Policy, Planning & Research, 2003

3.1.3 Cycling Tourism

Cycle Tourism can be defined as recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit.

- More than 30% of Ontario tourists cycled at least once on their trip. Touring cyclists spent at least \$150 a day. Bicycle retail and tourism in Ontario are worth at least \$150 million a year³.
- The annual expenditures specifically linked to La Route verte in Quebec rose to \$95.4 million in 2000, representing 2,000 jobs and \$15.1 million and \$11.9 million for the governments of Quebec and Canada respectively. Most of the users of La Route verte are sport cycle tourists (that is, tourists for whom cycling is the primary reason for being on La Route verte, rather than some other tourist activity) who account for 57% of the expenditures⁴.
- In 2002, Québec hosted 190,000 bicycle tourists. They spent an average of \$112 per day as opposed to other tourists who spend \$52 per day. They stayed an average of 6.5 nights as opposed to other tourists who stayed 3.1 nights⁵.
- In Victoria, Australia, two events, “Around the Bay in a Day”, a 210 km day ride, and the “Great Victorian Bike Ride”, a 9 day supported ride, attracted more than 8,000 riders each in 2004.
- Cyclists in Austria account for up to 90% of overnight stays and contribute \$90 million per year in economic benefits. There are 30 different routes in that country covering 4,000 km.
- A study of cycle tourism in Maine revealed that many cyclists will travel further distances to take advantage of shared paths. Research in this state has pointed to the importance of effective marketing, infrastructure investments and supportive services for a successful cycle tourism industry⁶.
- According to the Adventure Travel Report, published by the Travel Industry Association of America (TIAA), over 27 million North American travellers have taken a cycling vacation, making it the third most popular outdoor vacation, after camping and hiking.
- In Canada, 38% of Soft Outdoor Adventurers will cycle during their travels.

³ Regional Niagara, *Bikeway Master Plan Study*, 2003.

⁴ M.G. Archambault and P. Joly, *Les Retombées Économiques de La Route verte*, 2001.

⁵ Vélo Québec, *La Route verte Special Issue*, September 2002.

⁶ Maine Department of Transportation, *Bicycle Tourism in Maine, Economic Impacts and Marketing Recommendations*, 2001.

CANADA

It's worth taking a closer look at the province of Quebec as the province is making great strides in developing La Route verte into a world cycling destination.

Quebec⁷:

In 2000, there were an estimated 5.5 million bicycles in Quebec, including 4.2 million adult bicycles. That's an impressive 61% of all adults in Quebec who own at least one bicycle. It should also be noted that over 300,000 people in Quebec have the equipment required to cycle with their children.

Bicycle tourists in Quebec represent 11% of the provincial population or 21% of all cyclists. They are divided in two categories:

1. Those for whom cycling is the main motivation for travel (athletic bicycle tourists); and
2. those for whom cycling is a leisure activity (vacationing bicycle tourists).

These approximately 500,000 bicycle tourists share the following general profile:

- well educated (49% have a university degree);
- well paid (83% earn over \$40,000 per year);
- most of them (70%) have no children living at home;
- primarily older adults (66% are 35 to 54 years old; 20% are 55 or older).

What does the Quebec market represent?

- On average, Quebec bicycle tourists travel a total of 15 days per year, generally spread out over two to four trips.
- They prefer either hotels (B&Bs, hotels, motels, etc.) or campsites.
- Bicycle tourists spend an average of about a hundred dollars a day, making them a lucrative tourist.
- Bicycle tourists prefer travelling mainly on quiet rural roads or on bicycle paths.

3.1.4 Trails and the Cycling Product

Trans Canada Trail

A review of the Trans Canada Trail provincial sections was undertaken to determine best practices from each of the provinces. Although PEI is the only province with a completed trail infrastructure and the closest to being ready to market, it is interesting to note initiatives in other parts of Canada. Below are highlights from information researched on each of the provinces' trail websites.

In addition we interviewed John Bellini, CEO of Trans Canada Trail Foundation, who elaborated on a number of the provincial initiatives mentioned below:

⁷ Source: *Bicycling in Quebec in 2000*, Université du Québec à Montréal (UQAM) Tourism Chair, 2001.

British Columbia (Trails BC – www.trailsbc.ca):

- Trails BC identifies three kinds of travellers on the Trans Canada Trail: through travellers (they set a goal to traverse a long section of the trail, town to town or across the entire province or country), section travellers (they select portions of the trail to travel at a selected time, accumulating travelling on the trail over a period of time), and local network (they explore networks of local trails that exist around many communities).
- The trail system in British Columbia is divided in seven regional sections.
- Trails BC users can become members for a yearly fee (membership categories include individual, group and associate). The fees collected serve to continue building the trail.
- Trails BC produces the *Trail Talk Newsletter* which offers information about events and trail development updates. It is published once or twice a year and available on the Trails BC website for free download.

Alberta (Alberta TrailNet – www.albertatrailnet.com):

- Five core groups of trail users are identified: Alberta Bicycling Association, Alberta Equestrian Federation, Alberta Snowmobile Association, Cross Country Alberta and Alberta Off Highway Vehicle Association.
- The trail is host to a number of events including full day guided hikes, adventure races and relays.
- The trail is also the setting for training sessions such as bike clinics and training courses targeting industry (“Bikeway Planning and Development” training course on how to develop cycling infrastructures).
- The community is also involved through groups such as Scouts Canada and “Friends of the Trail”.

Saskatchewan (Saskatchewan Trails Association – www.sasktrails.ca):

- Saskatchewan Trails Associations divides its trail network into 12 sections and provides detailed information for each. This information includes a detailed map, the basic trail information in a table format (length, surface, level of difficulty, and which activities are allowed on that particular section: hiking, biking, cross-country skiing, snowmobiling and horseback riding), things to do and places to go (with trail side community attraction information), accommodations and campgrounds.
- The trail hosts a unique event in collaboration with the Red River Metis Heritage Group Inc. The cart journey traces the original trek of Metis from St. Norbert, Manitoba, west to Batoche, Saskatchewan. Participants dress in historic costumes and use horses and horse drawn carriages.

Manitoba (Manitoba Recreational Trails Association Inc. – www.mrta.mb.ca):

- Manitoba's interpretive maps have been translated in French and are posted on the Association's website. These documents include detailed information – in French – including an introduction to the region, where to stop along the trail, contact information for several trail groups and other resources, flora and fauna, a quiz and more.

Ontario (Ontario Trails Council – www.ontariotrails.com):

- The Ontario Trails Council website features an event calendar which includes OTC activities.
- The OTC is working with the Greater Rochester Trails Committee (US) to organize cross-border events and other initiatives.

Quebec (Conseil québécois du Sentier transcanadien):

- Quebec's Route Verte (a cycling path) and the Trans Canada Trail will overlap in certain regions and be separate in others. The National Trail (Sentier National) is a hiking alternative to the multi-use TCT that follows a separate route north of the Saint Lawrence.

New Brunswick (New Brunswick Trail Council Inc. – www.sentiernbtrail.com):

- A complete trail guide for NB can be purchased through Service New Brunswick for \$13.08.
- The NB Trail Council promotes an education component to the trail with activities for children such as *Ranger Robin*, *You can't see me!*, and *Silly Symphony*.
- The NB Trail Council's website offers a form where damages to the trail can be reported; the form can also be printed and mailed to the Manager of Construction and Maintenance.

Nova Scotia (Nova Scotia Trails Federation – www.novascotiatrails.com):

- NS Trails produces a 16-month calendar that retails for \$10.
- In Nova Scotia, there are 139 community-based non-profit groups that develop and maintain the province's network of trails.
- An event organizer manual is available on the NS Trails website. This manual provides information on how to organize an event for the International Trails Day celebrations, and is also a template for the organization of other community events. It includes information on how to promote the event, how to build partnerships, setting goals, planning the event and much more.

Newfoundland and Labrador (Newfoundland T'Railway Council – www.trailway.ca):

- T'Railway Trivia offers information related to the railway history of the trail (the trail follows the route of the former Canadian National railway from Port aux Basques to St. John's).
- A variety of merchandise is available: lapel pins, t-shirts, coffee table books, caps, safety whistles, etc. The order form can be printed and mailed.

Prince Edward Island (Island Trails – www.islandtrails.ca):

- Interactive map provides distances and interesting information about each section of the trail
- Events occurring on the trail are posted on the site

Yukon Territory (Klondike Snowmobile Association – www.ksa.yk.ca):

- The Klondike Snowmobile Association is overseeing the development of the territory’s sections of the TCT. Some sections are only suitable for mountain biking.

Northwest Territories (NWT Recreation & Parks Association – www.nwtrpa.org):

- The trail is primarily a water route and passes through a total of 16 northern communities on its way north, including an overland addition to the Trail which leads up to Yellowknife.

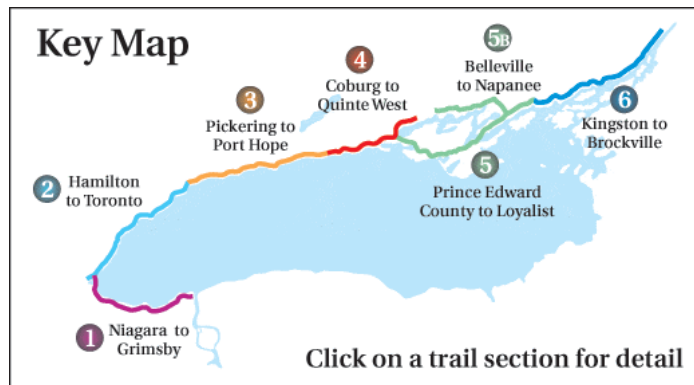
Nunavut (Department of Sustainable Development, Government of Nunavut – www.gov.nu.ca/sd.htm):

- No information about the Trans Canada Trail available.

Other trails in Canada

Ontario:

Lake Ontario’s Waterfront Trail and Greenway (www.waterfronttrail.org):



The 740 km Waterfront Trail follows the shore of Lake Ontario, connecting 31 communities from Niagara-on-the-Lake to Brockville. On June 12, 2005 it was announced that the Waterfront Trail now connects with La Route verte in Quebec making the inter-provincial trail network accessible to Ontario and Quebec residents and tourists alike. The Trail is near 182 parks and natural areas, 152 arts and culture heritage attractions, 170 marinas and yacht clubs, and 37 major annual waterfront festivals are organized on the trail.

The Waterfront Trail has 450 km of trail that is designated (signed) and 290 km that is undesignated (signage yet to be installed and/or gaps in alignment). Uses of the trail include multi-use (pedestrian, cycling, rollerblading), recreational and commuting (24% of trail users use it to commute regularly).

Quebec:

La Route verte (www.routeverte.com):

Under development since 1995, the Route verte will comprise 4,000 kilometres of bikeways linking the various regions of Quebec when completed. The Montérégie, the Laurentians, Montreal and the Outaouais are the regions with the greatest number of bikeways. The trail system is expanded in a number of different ways:

- By using public right-of-ways (abandoned rail corridors, towpaths, hydroelectric right-of-way, etc.);
- By paving shoulders to make roads safer for cyclists;
- By identifying certain rural roads with little traffic as “designated cycling routes”.

The project is inspired by the most important and well-reputed cycling networks in the world:

- The national cycling routes in Denmark;
- The National Cycle Network under development by the group Sustrans in the UK;
- Danube and Rhin cycling routes (going through 5 countries)
- American cycling networks made possible thanks to Rails-To-Trails Conservancy;
- Coast itinerary in Oregon and California

The Route verte is marked with signs standardized by the Quebec ministry of transportation. These markers are often accompanied by signs displaying route information and by tourist signs highlighting nearby services or attractions. On the existing segments of La Route verte, there are 150 establishments that rent bicycles and about 460 lodging services (B&Bs, hotels and motels, etc.), not to mention the 80 campgrounds along the route.



Economic spin-offs of the Route verte have been assessed by the Tourism Chair at the Université du Québec à Montréal. The survey, conducted in 2001, determined spending habits of cyclists in the province to total over \$166 million in 2000. Key findings of the survey can be found in Appendix 1.

Vélo Québec sponsors the campaign “Cyclists Welcome!”. The use of a certification mark (logo) identifies and publicizes accommodations that cater to bicycle tourists and that are located near the Route verte.

Certified “Cyclists Welcome!” establishments are committed to offering the following services:



- a covered and locked space where bicycles can be stored at night;
- facilities where cyclists can wash and dry their clothing and equipments;
- a pump and tools for making minor repairs;
- high-carb meals with larger-than-average portions of fruits and vegetables;
- information on local bicycle repair and rental outlets and regional tourist information offices.

Le P’tit Train du Nord (www.laurentides.com):

This former train track now offers 200 km (125 mi.) of forest trails. It is located north of Montreal and connects the communities of Saint-Jérôme and Mont-Laurier. Summer activities include cycling and hiking, winter activities include cross-country skiing between Saint-Jérôme and Val-David (45 km), and snowmobiling (117 km). Since the summer of 2003, one section of the trail is paved for 88 km allowing for in-line skating to be practiced. The trail also features 47 interpretive signs.



US and Overseas

La Route verte in Quebec identifies the following as important cycle networks:

- The national cycling routes in Denmark;
- The National Cycle Network under development by the group Sustrans in the UK;
- Danube and Rhin cycling routes (going through 5 countries)
- American cycling networks made possible thanks to Rails-To-Trails Conservancy;
- Coast itinerary in Oregon and California

We are also looking at the Dutch network as cyclists from that country have expressed an interest in PEI and the Confederation Trail.

Holland⁸:

In Holland, cycling is a way of life. It is estimated that out of 15 million people 12 million own bicycles. The Dutch use the bicycle as a way of transportation rather than just for recreation.

There are many special lanes and paths for cyclists with a total length of approximately 17,700 km (11,000 miles)! (See Appendix 3) These lanes are recognizable by the round blue sign with a white bicycle in the middle. They will take the cyclist through some of the most attractive regions of Holland. In many parts, special routes for cyclists are indicated. Many companies specialize in the rent and repair of bicycles. Special events for cyclists are also regularly organized.

The climate is characterized by mild winters and comfortable summers. Another important aspect is that Holland is generally flat with only an occasional hill. This makes the country ideal for even longer tours and also allows the youngest and the oldest members of the family to participate. En route, there are plenty of opportunities to take a rest at terraces of restaurants and cafes, specially built picnic areas or anywhere along the side of the road.

The following day trip suggestions are offered for the visitors: Bicycle Routes in Bloom, Biking along Rivers, Biking along Windmills, Through the City, Along the Coastline, Heath and Forests.



The National Bicycling Foundation has designated a network of long distance bike routes, so called LF routes throughout Holland, with a total length of more than 3,700 miles. Route guides have been developed and include information such as an outline map, a register of addresses for overnight stays, ferries, museums and information offices.

⁸ Hollan1d Tourism Website: www.holland.com

Denmark ⁹:

Denmark's network of cycle paths is quite unique, with a total of more than 10,000 km of safe, interconnected, coordinated and well sign-posted cycle paths that can take the visitor off the beaten path. The distances are short, the scenery is pretty and varied and there are no mountains – just gentle slopes of which around half tend to go downhill. 3,500 of these kilometres make up the main backbone of the biking country that is Denmark: the 11 national routes, running either north-to-south or east-to-west throughout the country. On top of this are countless regional and local routes, all perfectly laid out for cyclists.



National Route



Regional Route



Local Route

UK ¹⁰:

The National Cycle Network offers 9,500 miles of signed, safe and attractive cycle routes in the UK. By September 2005, 10,000 miles will put almost 75% of the UK population within two miles of the Network.

One third of the Network is on traffic-free paths, with the rest on quiet minor roads and traffic-calmed streets. These well-marked routes provide fantastic leisure opportunities, as well as links into towns for schools, work and stations.

- In 2003, the NCN carried 126 million trips by cyclists, walkers, and other users
- Of these, 77 million were trips by cyclists and 49 million by pedestrians
- On a like-for-like basis (i.e. not including growth resulting from extensions to the NCN), this represents a year-on-year growth of 10% in the number of cycling trips
- Traffic free routes (which account for one third of the NCN) were critical to this growth, with 13% year-on-year growth between 2002 and 2003, compared with 6% on road sections of the NCN
- During 2003, total open length of the NCN National Routes grew by 18%, leading to a total use increase of 30%, from 97 million trips in 2002 to 126 million trips in 2003

⁹ Denmark Tourism Website: www.visitdenmark.com

¹⁰ Sustrans National Cycle Network: www.sustrans.org.uk

Austria – Danube Cycle Path:

The most famous bike-Tour in Europe: from Passau to Vienna along the beautiful Danube for 305 km. The cycle path is asphalted, mostly flat with 90% free of traffic. Occasional slight ascents take cyclists to the important sight-seeing attractions. The difficulty is rated as easy and suitable for families.

Germany – Rhine Cycle Route:

The Rhine is Germany's mightiest river and one of the great waterways of Europe. The whole of the Rhine Cycle Route (330 km) has an international feel, and the stage through the Rhineland-Palatinate, which includes the Upper Middle Rhine Valley, is considered to be the jewel in the crown.

This well-maintained, mainly asphalt section follows the course of the river Rhine on mostly level terrain. Large sections are car free. There is no standard signposting for the whole of the Rhine Cycle Route.



Bett & Bike

More than 4,100 accommodation providers are involved in the scheme.

US – Rails-to-Trails Conservancy:

Rails-to-Trails Conservancy (RTC) is the backbone of one of the largest recycling efforts in the United States: the preservation and development of unused railroad corridors as healthy, attractive multi-use trails. Since 1986, RTC has been the major force behind the public attitudes and political environment that have helped open 12,650 rail-trail miles. So popular are these safe and accessible trails that another 16,000 miles of former rail corridors are in the project stage.

Ten Most Heavily Used Trails in America

Name of Trail	State	Average number of yearly users	Trail Description
W&OD Railroad Trail	Virginia	3,000,000	The 100-foot-wide W&OD has been called "the skinniest park in Virginia." But it is also one of the longest parks, 45 miles of paved trail for walking, running, bicycling and skating and 30 miles of adjacent gravel trail for horseback riding. Built on the roadbed of the former Washington & Old Dominion Railroad, the multi-use W&OD Trail runs through the urban heartland and countryside of Northern Virginia.

Minuteman Bikeway	Massachusetts	2,000,000	Built by the Commonwealth of Massachusetts on an inactive railroad, the 10-mile asphalt bikeway is collectively managed and maintained by the four communities it passes through: Bedford, Lexington, Arlington, and Cambridge.
Pinellas Trail	Florida	1,200,000	The Pinellas Trail is a 15-foot wide paved asphalt trail built along an abandoned railroad corridor throughout the length of Pinellas County (34 miles).
Iron Horse State Park Trail	Washington	1,200,000	The Iron Horse State Park trail was constructed from the western section of the Milwaukee, St. Paul and Pacific Railroad bed. The 66.5 miles of trail's elevation descends from 3100' to 1500', not in excess of a 2% grade. There are thirty substantial trestles, 4 tunnels (one of which is 2.3 miles long), two snowsheds, 3 developed trailheads. The surface is of gravel and ballast.
East Bay Bicycle Path	Rhode Island	1,100,000	The East Bay Bike path is a 14.5 mile, 10 foot wide, ribbon of asphalt that provides a safe place for unobstructed cycling. Users can enjoy the sites, sounds and smells as the path takes them by coves and marshes, over bridges, and through some Rhode Island State Parks.
Fox River Trail	Illinois	1,000,000	The Fox River Trail is used for hiking, biking, cross-country skiing and jogging and stretches from Algonquin to Aurora. The 35-mile trail is of Asphalt, Crushed Stone, Concrete.
Baltimore & Annapolis Trail	Maryland	1,000,000	The Baltimore & Annapolis Trail Park is a 13.3 mile asphalt trail linking schools, suburban homes and apartments, shopping centers and malls, and churches. It follows the route of the old B & A Shortline Railroad, a light interurban line that connected the state capital of Annapolis to the city of Baltimore with passenger and light rail freight service.
Northern Central Railroad Trail	Maryland	1,000,000	The North Central Railroad (NCR) and York County Heritage (YCH) combine to create an awesome trail. Despite its proximity to Baltimore, this 41 mile long trail follows nearly all rural terrain. The surface is fine crushed gravel and is in generally good condition.
Provo Jordan River Trail	Utah	1,000,000	The Provo Jordan River Parkway Trail is on a linear corridor that totals 43 miles in length. However, not all of the trail is paved. There is a total of 26 miles of trail that is paved and available for in-line skating. Dusty horse trails or not yet connected sections of future pathways lie between the paved stretches of trail.

Burke-Gilman Trail	Washington	1,000,000	The 27-mile trail begins at Gasworks Park on Lake Union and follows an old railroad right-of-way along the Ship Canal and north along Lake Washington. The surface is of asphalt.
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3.2 Literature and Document Review

Some of the documents reviewed were provided by Tourism PEI while others were acquired through research. A complete list can be found in Appendix 1.

3.3 Site Assessment and Infrastructure Review

For the Confederation Trail to be a world class tourism product it must have a unique image, including character areas; a superior wayfinding system which must be visible; and it must be constructed and maintained in the highest of quality (trail surface, width, trail slope, trail length, bridges, etc.). These elements were analyzed during an on-site infrastructure review and helped put forward the recommendations found in Section 4.2.

3.4 Focus Groups

Three focus groups were conducted August 9 and 11 with key stakeholders representing government, trail community and tourism operators in western (Summerside), eastern (Montague) and central (Charlottetown) regions. Detailed findings of each focus group are included in Appendix 2. The SWOT summary appears below.

Strengths	<ul style="list-style-type: none"> • Tip to tip, continuity • Safe for families • Nice surface, flat • Beautiful, varied flora/fauna • Free for users • Through rural communities, accessible from multiple points • Clean air, sense of freedom, quiet, serene • Unique experience • Urban product in Summerside • Multi-purpose • Nice bridges • History • Trail can be completed in sections
Weaknesses	<ul style="list-style-type: none"> • Surface varies, not wheelchair and stroller friendly • Logo too old looking, says nothing about PEI • No shoulder • Linear, no loops • Too much in the country, users can't see the same sights as a car tourist • Gates

	<ul style="list-style-type: none"> • No good directions/signage in Charlottetown • Parking areas • No bike racks/places to lean bikes • Not high awareness of product with tourists • Not enough coastal routes • No trails in Provincial Parks • Not enough washrooms on Trail, services along trail not constant • Not enough road signage, km on trail not accurate with map, lack of signage on trail and at intersections, signage at trail head not clear/or non-existent, no cross-walk signage • Bike type not specified on tourist info. • No shuttle • Lack of info about Trail, map is weak, no indication of key attractions • No real research about Trail
Opportunities	<ul style="list-style-type: none"> • Identify which, if any, sections are good for road bikes • Sell connection from community to community • Identify amenities on map, community maps with attractions and distances • Meet the locals, connecting with community centres • Fundraisers • Loop with varied distances/time frames • Shuttle and bike rentals along Trail • Urban product (add bike logos on paved shoulders) • Signage pointing to community products • Pre-book B&Bs along Trail, B&Bs website – map with accommodations close to the Trail • Stop areas (picnic tables, rest areas, shelters) • Paving sections of the Trail • Determine profile of cyclists/offer packages that answer their needs • Interpretation of flora/fauna/history • Involve schools • Link to cycling sites/promote in specialized publications • Paved urban centres with links to key attractions/products • Shoulder on coastal roads • ATVs during shoulder season • Bird watching and guided hikes • Continuous story through interpretation; culture/heritage product (history of the rail line) • Old railway stations, artefacts of railway • Specific travel guides: bird watching, cycling, snowmobiling • Certificate of completion • Calendar of events • Customized tours, day trips/2-day trips, etc. • Get people off the Trail onto the road for a few Km (tie with Coastal Routes and Heritage Routes) • Partnerships with Parks • Experiential/learning tours • More training to VIC staff about Trail

	<ul style="list-style-type: none"> • Topographic map • Annual tip-to-tip race • “Traffic Report” to advise operators when groups are coming • Parallel trail (horses in summer, cross-country in winter)
Threats	<ul style="list-style-type: none"> • Media (creates fear factor) • Graffiti / vandalism of signage • Cell coverage? • ATVs • Crossing trail/road • Emergency services (911)?

3.5 Stakeholder Interviews

Interviews were conducted with primary stakeholders, both public and private sector, across the Island. Participants are listed in Appendix 3. Since the regional focus group discussions ran the gamut of strengths, weaknesses, opportunities and threats, the individual interviews were used mainly to hone in on opportunities and to begin assigning some sense of priority to these.

Because of the importance of tour operators to the success of Confederation Trail and to soft adventure tourism in general, we have highlighted below four of the discussions:

Tour Operators

Freewheeling Adventures, Hubbards, NS – David Fullerton

Plans, organizes, and equips guided or self-guided bike tour or multi-sport vacations in Canada, Iceland, Europe, or Latin America since 1987.

Sections of Trail used	<ul style="list-style-type: none"> • Mt. Stewart to St. Peters
Best destinations	<ul style="list-style-type: none"> • Tchech Republic (trail network exclusive, no motorized vehicles allowed) • Cape Breton (road cycling)
Confederation Trail (positive)	<ul style="list-style-type: none"> • Signage good • Entry points easy to find • Map well developed • Amenities excellent • Trail Side Café • Easy to get on and off the trail
Confederation Trail (negative)	<ul style="list-style-type: none"> • Surface • Landscape in other sections of the trail boring • Can’t recall logo
Opportunities	<ul style="list-style-type: none"> • More bike rental facilities • Pave surface (would generate 75% more interest) • Promoting trail during best time of year (when lupines are out, fall colours, etc.)

Scott Walking Adventures, Hubbards, NS – Angela Chisholm

Organizes hiking and walking trips to destinations such as Eastern Canada, Quebec, Iceland and Bermuda since 1992.

Sections of trail used	<ul style="list-style-type: none"> • Offers trips to PEI, but doesn't use the trail
Confederation Trail (positive)	
Confederation Trail (negative)	<ul style="list-style-type: none"> • Trail too flat, not interesting for walking/hiking
Opportunities	<ul style="list-style-type: none"> • Develop coastline trails • A larger network of trails

Bike Riders Tours, Boston, MA – Peter Williams

This adventure travel company offers distinctive, elegant high end bicycle vacations through New England, the Maritimes, and Europe. The bike tours have earned a reputation for exciting, off-the-beaten track itineraries, luxurious inns and outstanding restaurants offering meals brimming with fresh, local specialties.

Sections of trail used	<ul style="list-style-type: none"> • Charlottetown to Hunter River • Morrell to St. Peters • Small portion in Elmira • Uses road the rest of the time
Confederation Trail (positive)	<ul style="list-style-type: none"> • Good signage when exiting Charlottetown • PEI is a great destination • Interesting scenery, small towns, quiet places – the serenity of the Island is a draw
Confederation Trail (negative)	<ul style="list-style-type: none"> • Route 6 near Rustico and Stanhope and Route 13 Cornwall towards Blue Heron are used by cyclist, but very dangerous • Like trail, but don't need trail
Opportunities	<ul style="list-style-type: none"> • Educate communities about the value of cycling tourism for PEI • Educate drivers on how to pass cyclists on the road would increase safety • Integrating Confederation Trail with other trails to develop a network in the province • Use La Route verte in Quebec as a template – good at integrating a core trail with other quieter, rural roads as part of the network • Need a publication specifically for cyclists with detailed map of each region, including itinerary suggestions for self-guided tours • Address safety issues – promoting PEI as a safe destination to cycle would appeal to tour operators • Reach out to tour operators with a FAM tour for development staff

Atlantic Canada Nature Safaris, Halifax, NS – Peter Oickle

Offers walking/hiking tours in Atlantic Canada and northern Ireland since 1995.

Sections of trail used	<ul style="list-style-type: none"> • Only uses small portions here and there
Confederation Trail (positive)	<ul style="list-style-type: none"> • Amenities good
Confederation Trail (negative)	<ul style="list-style-type: none"> • Unusable • Gates/barriers are a major problem • Can't be everything to everyone (decide which market to go after) • Not really seeing PEI, no coast – need to get off the trail to see the ocean and this is what most people want to see • Marketing is skewed (only shows the Morell/St. Peters section) •
Opportunities	<ul style="list-style-type: none"> • Design trail network as a highway system with the appropriate signage, overpasses (look at QC for model) • Interpretation of flora and fauna • Designated shoulder on road to take cyclists near the coast

4. Recommendations

By design, grass roots community volition has always been the driver for trail development on Prince Edward Island. The same principle should apply to implementation of enhancements that will take the trail to the next level. This strategy aims to inform and motivate community organizations to take (or keep) ownership, to empower them to drive the project forward.

The strategy is based on seven domains of trail enhancement, each equally important. Enhancements will have to come from all domains at the same time. This approach assures community input throughout the entire process from buy-in on standards and management to expansion and marketing. Setting detailed phasing in the absence of fiscal funding targets is guesswork at best. The intent here is to set a rational approach that allows tasks to be completed in an order that maintains the community focus.

The first priority is to garner support among the stakeholders to ensure there is buy-in and understanding of the vision. Developing standards of excellence will assist in demonstrating how the vision will be achieved. Once the overall quality is set the image of an enhanced trail project will be clearer – simply adding more of the same product to other areas of the province will not lead to a “world class” trail on its own. The trail needs to become more meaningful, more enjoyable and more fully appreciated as a tourism opportunity before it can get to the next level.

The visual impact of good landscape design can frame views, form accents, pull the eye further down the trail, create shade and shadow patterns, enhance wildlife habitat, and improve berry picking to name a few. The landscape techniques which would best serve to transform the trail edges to alluring foregrounds and living enclosures need to be articulated in a manual specific to the Confederation Trail. The manual would address views of all types, setting contrast and visual interest through planting for sustained ease of long term maintenance. A list of indigenous and naturalized plants that would be appropriate along the trail is also required.

The second priority is to build the enhancements, manage it as a community resource and promote the trail as a multi-faceted recreational and destination tourism product.

The third priority is to expand the trail into key tourism areas, create a network of connecting trail types and package as a one of a kind trail experience.

The following “Grass Roots Implementation Strategy” charts a course for advancing the trail in a coordinated manner.

4.1 Grass Roots Implementation Strategy – Overview

DOMAIN	COMMUNITY SUPPORT	MANAGEMENT	INFRASTRUCTURE
PHASE I SET IMAGE AND STANDARDS	<ul style="list-style-type: none"> ▪ Town Hall presentations to explain strategy to communities 	<ul style="list-style-type: none"> ▪ Confirm Island Trails as private sector management partner ▪ Enlist Development Officers ▪ Prepare Best Practices manual for maintenance ▪ Adopt “0” tolerance for ATV use 	<ul style="list-style-type: none"> ▪ Install new trail warning & crossing signs: 500 @ \$100 x 2 = \$100,000 ▪ Design kiosk standards: \$7,500 ▪ Pave ‘Welcome Mats’ at road crossings to increase visibility: 88 @ \$1,200 = \$105,600 ▪ Upgrade trailhead signs with new logo and info: 50 @ \$1,000 = \$50,000
PHASE II BUILD OUT AND PROMOTE	<ul style="list-style-type: none"> ▪ Provide Best Practice manuals to Communities ▪ Support establishment of coordinated shuttle service 	<ul style="list-style-type: none"> ▪ Establish liaison coordinator with DOT & PW and communities ▪ Obtain lease or title of lands for expansion 	<ul style="list-style-type: none"> ▪ Install kiosk information signs: 36 @ \$2,500 = \$90,000 ▪ Create major trailhead locations complete with parking, signs, washrooms, potable water: 36 @ \$5,000 = \$180,000 ▪ Add more shelters: 20 @ \$7,500 = \$150,000 ▪ Add more benches: 250 @ \$250 = \$62,500
PHASE III EXPAND AND PACKAGE	<ul style="list-style-type: none"> ▪ Enlist Trail Ambassadors ▪ Historic programming to incorporate re-enactment, community characters 	<ul style="list-style-type: none"> ▪ Set certification standards for partners ▪ Collect user data to monitor for success 	<ul style="list-style-type: none"> ▪ Construct tent platforms and washrooms in remote areas of trail: 5 @ \$8,000 = \$40,000 ▪ Improve control gate designs: 500 @ \$300 = \$150,000 ▪ Add 50mm trail topping to depth and widen to 3m standard: \$750,000

DOMAIN	AESTHETIC QUALITY	INTERPRETATION	MARKETING	EXPANSION
PHASE I SET IMAGE AND STANDARDS	<ul style="list-style-type: none"> ▪ Prepare Best Practices manual for landscape views 	<ul style="list-style-type: none"> ▪ Collect resource information ▪ Identify distinct character nodes ▪ Set standards for message delivery 	<ul style="list-style-type: none"> ▪ Introduce new brand Image ▪ Tweak website and marketing materials ▪ Set TAC data requirements 	<ul style="list-style-type: none"> ▪ Extend trail at Gateway Village with major trailhead ▪ Plan land lease / acquisition for Tignish – North Cape, Elmira – East Point ▪ Co-plan North Shore route with Parks Canada
PHASE II BUILD OUT AND PROMOTE	<ul style="list-style-type: none"> ▪ Establish 3 demonstration sections along trail to act as standards: \$60,000 ▪ Improve Wood Islands trail edges: \$20,000 	<ul style="list-style-type: none"> ▪ Write storylines for signs: 200 @ \$500 = \$100,000 ▪ Translate: \$10,000 ▪ Do graphic layouts in-house: \$75,000 	<ul style="list-style-type: none"> ▪ Establish snowmobile rally event ▪ Integrate with Coastal Drive Strategies ▪ Promote cycling ▪ Promote heritage roads ▪ Host regular trail events 	<ul style="list-style-type: none"> ▪ Pave urban sections of trail ▪ Start North Shore expansion implementation ▪ Start Southern Kings expansion ▪ Start North Cape – Tignish and Elmira – East Point Trails
PHASE III EXPAND AND PACKAGE	<ul style="list-style-type: none"> ▪ Conduct workshop on landscape standards with work crews: \$3,000 ▪ Implement landscape enhancements with work crews: \$750,000 	<ul style="list-style-type: none"> ▪ Fabricate signs and install: 200 @ \$1,500 = \$300,000 ▪ Coordinate with PEI Agri-Tourism 	<ul style="list-style-type: none"> ▪ Establish major cycle event with qualified promoter and celebrity host /participant ▪ Package trail experiences 	<ul style="list-style-type: none"> ▪ Pave road shoulders ▪ Create urban cycle lanes

4.2 Development Strategies

4.2.1 Community Support

As discussed, grass roots community volition has always been the driver for trail development on Prince Edward Island. This is no accident: the sequence of trail development across the province has always been in response to the expressed desire of communities. Where community organizations wanted to press forward, development occurred. Where there was no interest, that section was delayed. The same principle should apply to next stage development. This strategy aims to inform and motivate community organizations to take (or keep) ownership, to empower them to take “their trail” to the next level.

Phase 1 Set Image and Standards

Town Hall Presentations

First phase calls for the presentation of this strategy to interested community organizations, from town councils to recreation departments to health and wellness groups.

Trail development strategy should demonstrate how tourism and community goals are mutually supportive. The character of the community is the attraction for knowledgeable visitors and in turn tourism creates economic benefit to sustain and strengthen that character. To demonstrate the importance of soft adventure and heritage tourism categories, the Canadian Tourism Commission provides the following supporting data:

Activity Based Market Segments

Activity Rankings
Adults with Recent Travel Experience in Canada

	Canadians	Americans
Soft outdoor adventure	#1	#2
Heritage tourism	#4	#1

Canadian Tourism Commission, Overview, Travel Activities and Motivation Survey (TAMS), 2003

Activity Based Market Segments

Took a recent lesiure trip in/to Canada

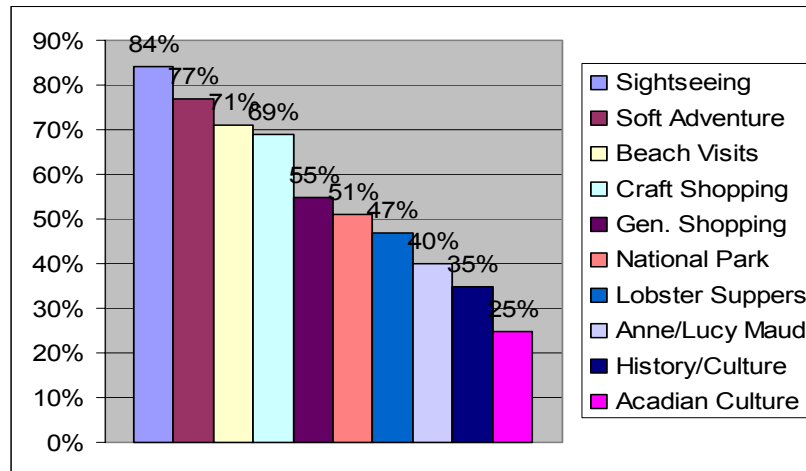
	Canada (000,000)	USA (000,000)
Millions of adults 18+	14.0	26.3
Soft outdoor adventure	4.4 million	7.1 million
Heritage tourism	2.2 million	8.3 million

Canadian Tourism Commission, Overview, Travel Activities and Motivation Survey (TAMS), 2003

For 26 million active American leisure travellers, heritage is the #1 motivator and soft adventure #2. For 14 million active Canadian vacationers, the motivators are reversed, and heritage is somewhat less important.

As far as visitors to Prince Edward Island are concerned, the tale is told in the last available Exit Survey, showing that in 2003, soft adventure was the #1 activity behind the catch-all of “sightseeing”:

PEI Visitor Activities 2003



2003 Exit Survey

Phase 2 Build Out and Promote

Best Practice Manual

Best Practice Guidelines should be agreed upon and provided to community organizations. These would expand and update the current *Confederation Trail Development Standards* to cover subjects like landscaping techniques, viewscape enhancement, plantings, trail services, interpretation (cultural and natural), branding, signage, maintenance, etc.

The Manual would also include best practices in terms of possible activities a community could host on the trail, how other communities are pointing trail users towards the services their community offers, the economic benefits of developing their section of the trail, etc. Communities could turn to the Manual for ideas, not only on how to develop their trail but also how to attract more visiting cyclists and walkers as well.

Shuttle Services

Until the trail becomes more than a linear park from here to there, shuttle services are essential from there to here. This was identified as a priority by numerous stakeholders and key informants. Communities and operators need to cooperate in providing shuttle services for trail users. These would be identified and promoted in trail literature.

Phase 3 Expand and Package

Trail Ambassadors / Historical Re-enactment

As discussed under Interpretation, community storytelling can go way beyond inanimate signage. Communities can be very creative in bringing to life their stop on the trail.

Local *Trail Ambassadors* could point out historic features, stage historical re-enactments, and of course direct trail users to nearby services. On the Appalachian Trail, for example local trail users act as “Trail Angels”, directing visiting hikers to the services they need. Island Trails already supports an extensive community based volunteer force, which can act as the core resource in this endeavour.



Island Trails photo

Programming can bring the trail to life as a mirror of the communities it runs through. Cultural interpretation should include historic re-enactment in communities like Kensington, Summerside, Emerald, Wellington, building on the successful model of the Capital Commission’s Confederation Players walking tours in Charlottetown.

4.2.2 Trail Management

It has been suggested that the province could play a more active role in managing the trail, for example:

Phase 1 Set Image and Standards

Confirm role of Island Trails as private sector management partner

The Island Trails organization has provided private sector leadership through the early life of Confederation Trail, playing a key role in trail development, community relations, advocacy, event management and other areas. This kind of leadership from a non-governmental organization will continue to be important as Phase II development rolls out.

Enlist Development Officers

The province has community development and tourism development resources which should be placed at the disposal of community organizations who want to take their trail to the next level. It is recommended that the Department of Tourism work actively with the Department of Development & Technology at senior levels to mobilize these resources on behalf of communities who express interest.

In this way, trail development will become a priority for Community Development Officers, as well as for Tourism Development Officers working for regional groups like Central Development Corp., Resources West and Active Communities Inc.

Best Practice Manual

The manual, described above, would include updated maintenance standards for the work managed by Transportation & Public Works.

Enforcement

Enforce legislation in areas like ATVs, helmet use, dogs on leash, etc. Zero tolerance policy has been recommended for motorized vehicles, including ATVs. This was consistently identified by stakeholders as the #1 threat to both condition and safety of the trail.

There may be a way to turn the ATV threat into opportunity. Although the escalating price of fuel may be a deterrent, there seems little prospect of this problem going away in the short term. Trail managers need to deal with it. Stakeholders have suggested the solution lies in more stringent enforcement on the trail and the provision of alternative sites where ATVs could be made welcome. It has been suggested that some provincial forest lands might be made available for this purpose.

Phase 2 Build Out and Promote

TPW Liaison

Establish more active liaison between community organizations and coordinator at Dept. of Transportation & Public Works (TPW) to tighten quality control, particularly as regards safety and security. Ensure that communities know who to contact if there are safety issues or maintenance needs on the trail. A toll free number could be advertised on the trail – the calls would then be directed to the appropriate department. In addition, review existing agreement between TPW and Tourism to clarify which department is responsible for what (new infrastructure, major and minor maintenance need, etc.).

Community Leases

One management concept raised during discussions with the Steering Committee involved leasing sections of the trail to communities interested in Phase II development initiatives identified in this plan. Funding could be cost-shared through programs managed by ACOA, HRSDC or other community and economic development groups.

Phase 3 **Expand and Package**

Set Certification Standards for Business Partners

Consider some form of certification system for service providers who wish to be identified as Official Partners of Confederation Trail. On La Route verte in Quebec, for example, establishments displaying the “*Bienvenue Cyclistes!*” sign are committed to offering specified services, including bicycle storage, laundry, minor repair facilities, special menus and local cycling information (see details of La Route verte and a description of Germany’s “*Bett & Bike*” program in section 3.1.4).



Participating community organizations might also be eligible for certification as official trail supporters. Quality Tourism Services (QTS) could be approached to provide monitoring services.

Collect User Data to Monitor for Success

While the provincial Exit Survey has provided some data on usage (see section 4.2.1 for 2003 Confederation Trail Data), managers could benefit from better data and more in depth analysis. It would be important to ensure that the Tourism Advisory Council research agenda includes data collection on trail use and customer satisfaction, so that these parameters can be tracked over time.

4.2.3 Infrastructure

Infrastructure is the term used to collectively define the physical components of the trail such as: signs, bridges, benches, trailheads, drainage pipes etc. The province also catalogues infrastructure by location in the “Confederation Trail Inventory”. The “Confederation Trail Development Standards” identify twelve construction standards for infrastructure.

The standards set the materials construction and location for infrastructure items. The development standards, however, do not fully address the issues of standard of acceptable maintenance.

The following trail enhancements are aimed toward increasing visibility and improved quality, two of the major drawbacks of the existing trail infrastructure.

Visibility

The Confederation Trail is a linear trail system with little to no opportunity for a looped trail experience. Trail users must either backtrack or arrange for alternate transportation at the end of a day’s journey. Entry points to the trail exist at the numerous intersections (some 250) of the trail and road network making it easy to get onto the trail, if one could only find it. The PEI Department of Transportation and Public Works has standards and policies in place to protect the public and its infrastructure investment. The current policy is aimed at reducing the chances of conflict between trail users and motorists by giving preference to motorists. Trail warning signs are located outside the ROW for safety reasons. The trail warning signs are also small and too complicated to be noticed or read from a moving vehicle. Trailheads and gates are also set back from the ROW making the numerous entry points to the trail difficult to find. The clay colour of the trail topping is easily perceived as another clay road or gravel driveway.



Trail crossing and signs are not visible



Trail is lost in sea of similar driveway and roadway material



Trail warning sign is too insignificant to be effective

Welcome Mat

Trail users are encouraged to cross roads at intersections and at their own risk. As such, crossings are not demarked on the road. Trail locations at potential road crossings are signed; however the sign is not legible to the motorist.

One way to safely make the entry points more visible would be to pave the first 4 m of the trail from the road with a coloured asphalt treatment such as “streetprint”. A brightly coloured surface would serve to alert both motorists and trail users of the intersection. This hard surface treatment would also reduce the amount of gravel that gets pushed onto the road surface by trail users. Welcome mats should be located at all paved roads that receive more than local traffic.



“Welcome Mat” Surface treatment at intersections

Trail Warning Signs

Trail warning signs need to be replaced with an image that is simpler and more recognizable by motorists.



Trailheads

Trailhead structures do an effective job of announcing the trail. The additional information supplied by the sign is not legible. Trailhead sign boards should be redesigned with the new logo to be recognizable from a vehicle travelling at 90 km hour. Sign content should include a mileage marker, logo, name of location/community and community content on an overlay panel, which can be updated as required.

Typical trailhead

Trail Shelters

The trail shelters are an effective way of identifying the trail. There are approximately 67 shelters on the trail from Tignish to Elmira. Add shelters to all entry points and at intervals of not more than 5 km.



Trail Shelter

Benches

There are approximately 153 benches along the trail from Tignish to Elmira. At an average of 2.5 km/bench this is not a world class standard. There should be an opportunity to sit every 1 km (typically every 15 minutes).

Barrier Gates

Barrier gates are located at all entry points to the trail as a means of controlling unauthorized motorized traffic. The gates are opened for winter snowmobile use. Steel gates have replaced the wooden gates which proved to be more susceptible to vandalism. Some less experienced cyclists find the negotiation between the offset gates to be too awkward and have to resort to walking their bikes through the gates. Others find ways to cycle around the outside of the gates. The gates could be oriented to make the manoeuvre



Barrier Gate



Threaded bolt extending past wood gatepost

easier for cyclists, but still severing to control motorized vehicles by setting gates 60° instead of 90° to the flow of traffic. Many of the gates are still made of wood, upgrading to steel would be a good time to alter the layout as proposed. There are approximately 392 gates on the Tignish to Elmira route alone.

Another potential concern is the threaded bolt, which often extends past the wood gatepost. The protruding bolt is a real danger for cyclists and pedestrians that get too close to the post. The end of the bolts should be cut flush with the nut to avoid this hazard for trail users.

Regulatory Signs

Regulatory signs are an important requirement for trail users. They ensure that users are aware of the proposed use of the trail. The message is usually an iconic graphic with the universal red circle and slash symbolizing “no”. The signs are small and unobtrusive.



Regulatory Signs



Distance Markers

Standard traffic signs are located to give advance warning of stop signs primarily for the faster moving snowmobiles. Mounting of these signs is unusually high to ensure they are obvious in winter conditions when they are most needed. Distinctive distance markers are located along the trail. The image on the sign also provides direction.

Interpretive Signs

Interpretive signs are infrequently located (approximately 21 on Elmira to Tignish section) and typically follow the Trans Canada Trail standard. This informative type of sign is well received, especially by tourists eager to learn more about the heritage and landscape of their unfamiliar surroundings. Interpretive signs should be located on average every 2.5 km along the trail ensuring minimum cultural input every hour. Interpretive signs should be bilingual and follow the Trans Canada Trail standard.



Information Signs



Interpretive Signs to TransCanada Trail Standard

Parking Lots

Access points to the trail not only have to be visible and informative they also need parking. Facilities such as the Eco-Centre in Mount Stewart and the Railway Museum in Elmira provide good access points to the trail. Parking should be located no more than 12 km apart along the trail. Ideally, parking should be located close to communities. The parking edge should be defined with guide posts. A trail map should also be adjacent the parking lot to orient visitors.



Old Railway Station at York



Trailside at Mount Stewart

Bridges

Trail bridges are comprised of old railway bridges modified to support trail use or newly constructed bridges. The variety of styles adds interest and character to the trail.

Trail Surface

A compacted 50 mm layer of native crusherdust generally covers a 150 mm layer of PEI DOTPW Class “A” gravel placed directly over the rail bed. The old rail bed provides an ideal flat surface for trail construction. All trails visited were well within suggested guidelines of 0-5% gradient. Trails are also cross-sloped for drainage. Where necessary a layer of selected borrow material serves as a sub base. The native stone gives the trail its “indigenous look”. The native stone is more susceptible to displacement and compaction from traffic and storm runoff. In many cases off-Island granular toppings have been used to repair problem areas resulting in a visually unappealing surface of patchwork complexity. All trail surfacing should be of indigenous stone.

The new trail at Wood Islands is much wider and the granular base extends out significantly from the trail surface toward the woods. The finish treatment resulting from this treatment is a much wider looking trail as the topping colour matches the base. The edges of the trail look rough and do not blend into the wooded areas in a pleasing manner and are susceptible to erosion. The edges should be topsoil and seed.

The trail width appears to be 2.4 m on average, although the standard width is 3.0 m. Many sections are under sized or have grown in, resulting in a narrower looking trail. Many trails also have excessive vegetative growth along the edges and within the trail surface itself. All trails should be maintained to the 3.0 m width.

Campsites

Average cyclists are capable of travelling 10 km in an hour. This would imply that an average cyclist could travel from Charlottetown to St. Peters in approximately six hours.

Hikers generally travel 13 km in a day (Trail Manual, Parks Canada 1978). There are only a handful of trail sections that come close to exceeding a day long hike without arriving at a community with support facilities. Some of these sections may include:

- St. Louis – Tignish
- Miscouche – Wellington
- St. Peters – St. Charles
- Harmony Junction – Baltic
- Murray River – Wood Islands



Adirondack Shelters

Basic campsite facilities should be erected for these trail users. Adirondack shelters or tent pads should be placed at 10 km intervals in remote areas, along with water and composting toilets.

Scenic Lookouts

Where opportunities exist for scenic lookouts, every effort should be made to enhance the view and picture taking opportunities. This may mean a small deck to compensate for sloping terrain, a boardwalk through a wet area, a clearing with low vegetation or even lookouts outside the trail proper to afford views of trail bridges from the highway.

Phase 1 Set Image and Standards

Install new trail warning signs

Heighten on-the-ground visibility of the trail through improved visual identification and signage at entry points and road crossings. There are approximately 250 crossings which will require 500 signs to be placed on existing posts.

Design kiosk standards

A kiosk or signage system at community intersections would identify the services available there.

Pave “Welcome Mats” at road crossings to increase visibility

There are approximately 88 locations where “Welcome Mats” of coloured asphalt would be warranted.

Upgrade Trailhead Signs

Existing trailheads will be upgraded to display the new brand image and clear, simple messages.

Phase 2 Build Out and Promote

Install kiosk information signs where (new) kiosk(s) (are) warranted

There are approximately 36 locations where a kiosk is warranted.

Create major trailhead locations complete with parking, signs, washrooms, potable water

There are approximately 36 locations where it may be possible to park or share parking with neighbouring facilities like visitor information or interpretation centres.

Add Shelters: 20 (more) needed

Using the suggested standard of one shelter per 10 km there are approximately 20 needed.

Add Benches

Using the suggested standard of one bench per km there is a need for approximately 250 more benches.

Phase 3 Expand and Package

Construct tent platforms and washrooms in remote areas of trail

There are five remote locations along the trail that will require overnight accommodation to facilitate hikers wanting to pass through these areas.

Improve control gate designs

There are approximately 500 sets of gates. Only one post needs to be relocated to create the easier cycle-through gate configuration.

4.2.4 Aesthetic Quality

The conversion of the railway to a trail created a wonderful link across Prince Edward Island. Unfortunately, the narrow corridor is not only boring in its alignment – built for train speed not trail speed – the vegetative edges screen the alluring pastoral landscape for which the Island is known. While there is little that can be done to the trail alignment itself, there are numerous opportunities to improve the visual quality of the trail.

Selectively managing the existing vegetation to uncover hidden vistas is critical to making the trail more memorable. A set of sustainable standards is required to illustrate landscape principles that truly reflect the visual character of the Island. The prudent use of selective thinning along with an understanding of plant succession and plant characteristics are key to understanding how the trail environment can be greatly enhanced without turning it into a high maintenance garden.

Phase 1 Set Image and Standards

Prepare Best Practices Manual

Engage Landscape Architect with experience in preparation of transportation manuals to prepare Best Practices manual for landscaping management to enhance views.

Phase 2 Build Out and Promote

Establish three demonstration sections along trail to act as standards

These areas will become outdoor classrooms to demonstrate the effectiveness of the landscape treatments. The test sites should provide varying landscape challenges.

Improve Wood Islands trail edges

The constructed edges required topsoil and top dressing with a shade resistant grass mixture to blend the trail into the woodland and farm setting.

Phase 3 Expand and Package

Conduct workshops on landscape standards with work crews

Work crew superintendents need to become familiar with the elements of landscaping for sustainable long-term visual enhancements as they will have the biggest impact on quality. A landscape architect should lead the crew through the process and principles of landscaping the trail for aesthetic appeal.

Implement landscape enhancements with work crews

4.2.5 Interpretation

Phase 1 Set Image and Standards

Collect resource information

Culture/heritage

The opportunity here is to revitalize the route of Confederation Trail as a culture/heritage resource. In a sense, Confederation Trail was the original cultural connector in that the railway linked one community to the next. In some seasons the railway was in fact the only link. The trail still does this. Each community can help visitors understand what makes it unique by providing interpretive insight into its own sense of place. Through interpretation at the local level, trail users will discover an authentic series of community portraits covering the diversity of culture and heritage across the Island. Much of the resource information already exists through the efforts of culture and heritage organizations in communities along the trail. The task here is to catalogue the information for later interpretation.

Natural features

Flora and fauna should be featured from one end of the trail to the other, expanding and updating the Trans Canada Trail / Bronfman Foundation program. Birding locations would be identified on location and in trail literature.

Identify distinct character nodes

Here the idea is to bring character and life to the trail by differentiating certain segments into diverse “character nodes”, then marketing them as such. In this way, visitors can expect to experience different aspects of Island life along different parts of the trail, for example:

- Agricultural heartland
- Coastal vistas
- Scenes of aquaculture
- Fishing villages
- Forested hillsides
- Urban living, etc.

Urban sections of the trail could ultimately have their own distinct character, where paved areas encourage expanded multi-usage in an urban context, through the use of road bikes, in-line skates wheelchairs. In Section 3.1.4 can be found a description of Holland's thematic approach. Unique aspects of the countryside are showcased in day trips such as *Bicycle Routes in Bloom, Biking along Rivers, Biking along Windmills, Through the City, Along the Coastline, Heath and Forests.*

Set standards for message delivery

Signage guidelines can assist the interpretation of local character but as discussed under Community Support, bringing the trail to life goes well beyond signs. Local *Trail Ambassadors* can add the human touch, welcoming cyclists, hikers and walkers, pointing out historic features, staging historical re-enactments, and of course directing trail users to nearby services.

Phase 2 Build Out and Promote

Write storylines

Writing engaging text for interpretive signs is a very specialized discipline. Only experienced interpretive planners should be commissioned to craft this critical task. As discussed below under Section 3.6, Marketing, Confederation was essential to viability of the Prince Edward Island Railway. Financing its completion was a condition of the province's entry into Confederation in 1873. The history of the railway as it relates to the history of the province is an interesting story and should be integrated into the interpretation along the trail and in marketing materials. This will also support the recommended branding.

Translate

As illustrated in the Interim Report, the Quebec cycling market represents great potential for Prince Edward Island. An impressive number of cyclists are nearby, waiting to be enticed to an active vacation experience in the unique environment of Prince Edward Island's trails, roads and byways. In order to attract this market, it is essential that all marketing materials promoting the Trail, including the Island Trails website, be bilingual. All interpretive signs should be bilingual as well. Signs should confine text to 150 – 200 words maximum.

Prepare graphic layouts

While each community story will have its own character, graphic guidelines will assist in bringing some continuity to Confederation Trail branding along the way. The most economical process would be to prepare the graphic and print layouts in-house following a set design formula.

Phase 3 Expand and Package

Fabricate signs and install

Constructing the signs with inexpensive materials is false economy as they just won't last. The Trans Canada Trail sign standard for interpretation should be followed or copied.

Coordinate with PEI Agri-tourism Product Club

Since so much of Confederation trail borders agricultural lands, there is opportunity for interpretation of what is growing and why this is important to Prince Edward Island. The PEI Agri-Tourism Product Club could be a partner in this effort.

4.2.6 Marketing

First by way of a positioning statement that defines Confederation Trail, places it in context and highlights what it can do for the customer, the following is recommended:

Positioning

Confederation Trail is the linear rail-bed core, completed to exacting standards in terms of surface and amenities, anchoring an Island trail system that leads cyclists and soft adventurers to the heart of everything that is Prince Edward Island, from the diverse cultural character of rural communities and farmlands to the coastal vistas framed by our shores.

In marketing this trail *system*, links would be actively promoted to hiking trails at Bonshaw and Dromore Woods, as well as mountain biking facilities such as those at Brookvale, Bonshaw and St. Catherines.

Culture/Heritage

From a culture/heritage point of view, Confederation Trail can be considered the original Cultural Connector that linked together communities centuries ago and continues to link them now. Interpretive materials and activities would provide insight into the variety of culture and heritage represented by these communities and help visitor to understand their diversity.

Shoulder Season

Confederation Trail may offer the best opportunity for achieving the elusive goal of increasing shoulder traffic for the province. Marketing and event strategy should focus on September/October and May/June.

Phase 1 Set Image and Standards

Introduce new branding

With input from focus groups and one-on-one interviews, the current branding approach was examined, evaluating name, logo and graphics. Essentially the conclusions were as follows:

Name

Sufficient time, effort and resources have been invested in the name, “*Sentier Confederation Trail*” to justify a degree of brand equity.

There’s logic in this too in that Confederation was essential to viability of the Prince Edward Island Railway. Financing its completion was a condition of the province’s entry into Confederation in 1873, with the rail line opening in May of that year, delayed by a four month shutdown due to heavy snows.



Georgetown

Recommendation: Retain the name.

Logo/Graphics

The current icon connoting the Fathers of Confederation uses the familiar “tipped hat” cliché symbol, executed in a cartoon style. It has little relevance to either the railway heritage or the trail’s product benefits such as fun, recreation, wellness, authenticity, heritage, learning, etc. Current graphic execution is generally small and unreadable.

Recommendation: Evolve branding for Confederation Trail to better reflect the heritage of the PEI Railway and connote the benefits of the product.

Theme

Current branding includes no theme.

Many communities linked by Confederation Trail have restored the most dominant symbol of their railway heritage by rebuilding the old railway station. This has provided infrastructure for today’s needs in the form of washrooms, information, interpretation, food and basic access requirements.

Some pictorial examples illustrate the point:



Montague



Murray Harbour

Dan Glenn

Sam Cioran



Elmira



Alberton

Island Trails

Island Trails



Morell

Island Trails



Kensington

Island Trails

Recommendation:

Evolve Confederation Trail branding, including a theme to better reflect the heritage of the PEI Railway and connote benefits of the product.

Preliminary Branding Exploration



Tweak marketing materials

The Trans-Canada Trail Official Guide (retailing at \$24.95) already provides a great resource for detailed trail descriptions. An interesting accompanying booklet could be offered at no cost to trail users, including a map (such as the one already produced) with additional details about the communities or “stations” along the trail, promoting the services they provide and the events they host.

The Island Trails.ca website should reflect the new branding, with appropriate links to the Tourism PEI site.

Cyclists should be targeted through specialized media, websites and direct marketing.

Set TAC data requirements

As discussed under Trail Management, research should be designed for inclusion in the Tourism Advisory Council research agenda. Data should be collected on trail use year-round, as well as attitudes and customer satisfaction, so that these parameters can be tracked over time.

Phase 2 Build Out and Promote

Establish snowmobile rally event

Snowmobiling gives the trail its winter identity and contributes economic benefit to providers of accommodation, food, fuel and other services during the white season. Given the strength of snowmobiling in New Brunswick and Quebec, it could make sense to think in terms of an annual Snowmobile-Atlantic rally event. The PEI Snowmobile Association might consider leading the way on this, working with similar organizations in neighbouring provinces and discussing potential support from ACOA Tourism Atlantic.

Integrate with Coastal Drive strategies

The opportunity here is to cross-promote with the new touring routes, *North Cape Coastal Drive* launched in 2005 and *Points East Coastal Drive* scheduled for 2006-07. Signage and marketing should promote adjacent sections of the trail to motorists stopped at map station kiosks. Similarly, trail marketing materials should point out scenic features on the nearby drives.

Product Development Strategy – Cycling

Advocate the macro strategy of making PEI one of North America’s premiere cycling destinations. Described as a macro strategy because it goes well beyond the trail, this should concept be raised with the Tourism Advisory Council’s Product Development Committee. Done properly, this could involve:

Product

Adopting an Island wide policy to make the entire province cycling friendly, including:

- Confederation Trail sections judged suitable for hybrid and mountain bike use

- Paved shoulders identified for cycle use on key connector routes
- Designated cycle lanes in urban areas
- Use of the Heritage Road network where applicable

Marketing

When market readiness has been achieved, market the Island cycling product aggressively to special interest target audiences. This would include:

- Promoting the whole cycle-friendly infrastructure identified above
- Promoting links to single track mountain bike trails at Brookvale, Bonshaw and St. Catherines
- Tailoring information to cyclists at Island entry points
- Developing and promoting services available to cyclists

Promote Heritage Roads

Promote more actively the network of Heritage Roads as part of the Island trail system.

Host regular trail events

Communities should be encouraged to think of the trail as a venue for events unique to their sense of place. As an example, the College of Piping’s Pipe Band might be seen regularly in Summerside marching on the trail into town. Annual blueberry festival, school outing, nature walk, fund-raising event, music/culture festival, recreation, walking/running, hiking/biking, health/wellness event can all have trail focuses.

The *TrailFest* concept invented jointly by Island Trails and the Medical Society of PEI a few years ago could be revisited. Each September, some 26 communities staged simultaneous trail events on the same day, week-end or week, resulting in a high profile health/wellness focus for Islanders and a meet-the-community feature for visitors. Schools were encouraged to participate in outdoor activities with recreational equipment awarded for high participation levels (which averaged in the high 90% range).

Cycling events can tie in the trail system with Coastal Scenic Drives.

Culinary tourism can play a role, perhaps book-ending the main outdoor season with an event in May to celebrate the opening of North Shore lobster season and culminating in a Harvest Dinner promotion at Thanksgiving. Other cultural tour products can include use of the trail, such as the Annual Studio Tour held each fall by the PEI Crafts Council.

Events can revolve around railway history. As an example, the Canadian National Pensioners Association has plans for a project to discover and preserve the stories of the PEI Railway. Through a virtual tour at www.1864.com and an interactive display located on the site of the old Charlottetown rail yard, the CN Pensioners hope to connect historical accounts of the railway with the present day Confederation Trail and the communities it connects.

Start Southern Queens/Kings expansion

Complete remaining rail bed to Confederation Trail standards along the Southern Queens/Kings sections described above. This will be facilitated by supportive community organizations already identified in Mount Stewart, Fort Augustus, Iona, Vernon, Lake Verde and the Town of Stratford.

Start Tignish - North Cape and Elmira – East Point extensions

Complete segments at northern and eastern extremities of the Island so as to deliver the “tip-to-tip” promise, extending the trail system from Tignish to North Cape and Elmira to East Point. (This could take the form of bike lanes on those sections of Coastal Drive).

▪ North Cape	15 km @ \$40,000	\$600,000
▪ East Point	10 km @ \$40,000	\$400,000

Pave urban sections of trail

Consider paving urban sections as the City of Summerside has done to expand multi-usage in the urban context, allowing for road bikes, inline skates and wheelchairs, etc. Paving urban surfaces also involves widening the trail to minimum recommended width of 10’ or 3 m.

Phase 3 Expand and Package

Pave road shoulders

In line with the macro cycling-friendly strategy, pave shoulders identified for cycle use on key connector routes.

Create urban cycle lanes

In line with macro cycling-friendly strategy, designate cycle lanes in the cities.

For specifications on road or street bike lanes, an excellent reference manual is available from engineering staff at Velo Quebec in Montreal, printed in English.

5. Budget Guidelines

The following should be treated as guidelines only, subject to tighter estimating when specifications have been finalized.

DOMAIN	PHASE 1 SET IMAGE AND STANDARD	PHASE 2 BUILD OUT AND PROMOTE	PHASE 3 EXPAND AND PACKAGE	TOTAL PER DEVELOPMENT PILLAR
Community support	Town Hall presentations \$5,000	Best Practice Manual \$7,500 Support shuttle services	Trail Ambassadors Historic programming \$25,000	\$37,500
Management	Confirm Island Trails as private sector management partner Enlist Development Officers, Best Practices Manual – Maintenance \$7,500 ATV enforcement	TPW/Tourism/Communities liaison coordinator Community leases	Set certification standards for partners Conduct research \$25,000	\$32,500
Infrastructure	Trail crossing, trail warning signs: 500 @ \$100 x 2 = \$100,000 Design kiosk standards \$7,500 Pave “Welcome Mats” 88 @ \$1,200 = \$105,600 Upgrade trailhead signs 50 x \$1,000 = \$50,000	Kiosk information signs 36 @ \$2,500 = \$90,000 Trailhead locations 36 x \$5,000 = \$180,000 Add shelters 20 @ \$7,500 = \$150,000 Add benches 250 @ \$250 = \$62,500	Remote tent platforms, washrooms 5 @ \$8,000 = \$40,000 Improve control gates 500 @ \$300 = \$150,000 Add 50mm trail topping to depth and widen to 3m standard \$750,000	\$1,685,600
Aesthetic Quality	Best Practice Manual – Landscape Views \$30,000	Demo sections 3 x \$20,000 \$60,000 Wood Islands trail edges \$20,000	Landscape workshop \$3,000 Landscape enhancements \$750,000	\$863,000

DOMAIN	PHASE 1 SET IMAGE AND STANDARD	PHASE 2 BUILD OUT AND PROMOTE	PHASE 3 EXPAND AND PACKAGE	TOTAL
Interpretation	Collect resource info. Establish character nodes Set message standards	Signage storylines 200 @ \$500 = \$100,000 Translation \$10,000 Graphic layouts \$75,000	Fabricate/install signs 200 @ \$1,500 = \$300,000 Coordinate with PEI Agri-tourism	\$485,000
Marketing	Branding \$1,500 Website \$1,500 Marketing materials \$50,000 TAC research planning	Snowmobile rally Coastal Drive integration, Cycling promotion Heritage Roads promotion Event management \$50,000	Major cycling event development \$50,000 Packaging strategy \$50,000	\$203,000
Expansion	North Cape and East Point planning North Shore* planning Gateway Village \$7,500	Urban paving North Shore* consultation South. Kings \$1,500,000 North Cape \$600,000 East Point \$400,000	Pave shoulders Urban cycle lanes	\$2,507,500
TOTAL PER PHASE	\$366,100	\$3,305,000	\$2,143,000	\$5,814,100

Note: Trail construction costs for the preferred North Shore extension option are estimated at \$7,305,484 for that portion of the trail outside the National Park (*North Shore Trail Extension Plan*, CBCL Limited, 2005).

6. Conclusion

The infrastructure, or building, of Confederation Trail is almost complete with 90% of the rail bed system in Prince Edward Island converted to a multi-use trail. To date, close to \$4 million have been invested in the product.

The proposed approach to Phase II Development of Confederation Trail aims to take it to the next level and make it an appealing destination for cyclists worldwide. The estimated \$6 million investment has the potential of generating significant incremental tourism revenues and economic spin-offs in PEI communities.

Looking at statistics compiled for this report, the return on investment delivered by other trail projects speaks volumes. In Ontario, it is estimated that touring cyclists spent at least \$150 a day and that bicycle retail and tourism in that province are worth at least \$150 million a year. In Quebec, the annual expenditures specifically linked to La Route verte rose to \$95.4 million in the year 2000, representing 2,000 jobs. Of that number, \$15.1 million and \$11.9 million benefited the governments of Quebec and Canada respectively. Overseas, cyclists in Austria account for up to 90% of overnight stays and contribute \$90 million per year.

The approximately \$6 million price tag to bring Confederation Trail to world class standards requires the commitment of government at all levels and the active participation of community organizations. With government and community partners, this is a realistic project. In addition, it is recommended that research be conducted to determine if Confederation Trail meets the requirements to become a National Historic Site of Canada.

The proposed phased approach has been designed make the required financial commitments more manageable and the whole project sustainable over time. In order to develop the project in a cohesive manner, it is strongly recommended that the phased strategy be respected and that the activities within each phase be completed as proposed.

Appendix 1 Literature Review

Confederation Trail Literature

- *Confederation Trail Development Standards*, PEI Department of Economic Development and Tourism, April 2005 (latest revision)
- *Final Report Development Potential of Snowmobiling as a PEI Winter Tourism Product*, Coles Associates Ltd.
- *Confederation Trail Visitors Report*, PEI Department of Policy, Planning & Research, 2003
- *A Review of the Provincial Parks System and Recommendations for a Sustainable Future*, Enterprise Management Consultants, 2001
- *North Shore Trail Extension Plan*, CBCL Limited, 2005
- *A Development Manual for a Community-based ATV Tourism Product*, Canadian Tourism Commission, 2003

PEI Tourism Literature

- *2005 Visitors Guide/Guide de l'Île 2005*, PEI Tourism, 2005
- *Tour the Island/Visite de l'Île*, PEI Tourism, 2005
- *PEI Parks/Î.-P.É. parcs*, PEI Tourism, 2005
- *Prince Edward Island 2005 Handbook*, ImageWorks, PEI, 2005
- *Confederation Sentier/Trail Map*, PEI Tourism, 2005
- *2005 Touring Guide North Cape Coastal Drive*, 2005

Other Cycling Destination Literature

- *Cycle Map & Guide Vancouver Island*, Capital Bike & Walk, 2005
- *Galloping Goose and Lochside Regional Trails*, Capital Region District Parks
- *Le Petit Train du Nord Cycle Map*, Association touristique des Laurentides, 2005

**Appendix 2
Focus Group Details**

Western Region

Date: Tuesday, August 9, 2005
 Location: Loyalist Lakeview Resort, Summerside

Participants: Anne Arsenault Western PEI Tourism Association
 Brenda Profit PEI Community Development Officer
 Chad Smallman Resources West Inc.
 Devon Lynch Resources West Inc.
 David MacDonald City of Summerside

Strengths	<ul style="list-style-type: none"> • Across the Island, goes through many communities and accessible from multiple points • No hills • Unique experience • Urban product in Summerside
Weaknesses	<ul style="list-style-type: none"> • Not wheelchair and stroller friendly • Not high awareness of product with tourists • Not enough coastal routes • No loops, linear • No trails in Provincial Parks • Maps not complete • Not enough washrooms on Trail • Not enough road signage
Opportunities	<ul style="list-style-type: none"> • Events (Ironman, West Prince, Fall '05) • More detailed map with community information, small booklet • Shoulder on coastal roads • ATVs during shoulder season • Shuttle & bike rentals • Bird watching and guided hikes • Continuous story through interpretation; culture/heritage product (history of the rail line) • Old railway stations, artefacts of railway • Specific travel guides: bird watching, cycling, snowmobiling • Certificate of completion • Calendar of events • Customized tours • Signage for accommodations, restaurant, etc.
Threats	<ul style="list-style-type: none"> • Cell coverage? • ATVs • Crossing trail/road • Emergency services (911)?

Confederation Trail – Phase II Development

Eastern Region

Date: Thursday, August 11, 2005 (AM)
 Location: Rodd Marina Inn & Suites, Montague

Participants: Pat Hayes Island East Marketing Group
 Randy Angus Cardigan Waterfront Development/Cardigan
 Community Development Corporation/Cardigan
 Chamber of Commerce/Island East Marketing
 Group
 Jim MacAulay St. Peters Area Development Corporation
 Doug Deacon Trailside Café/Hillsborough Area Development
 Corporation
 Barb MacDonald Trailside Café
 Ed McKenna

Strengths	<ul style="list-style-type: none"> • Province-wide • Multiple access points • Multi-purpose • Safe • Diverse wildlife – “seeing the real PEI” • Nice bridges • History • A connector between many communities • Unique product/experience • Sense of freedom/quiet/serene <p>Trail can be completed in sections</p>
Weaknesses	<ul style="list-style-type: none"> • Km on trail not accurate with map • Bike type not specified on tourist info. • Gravel not consistent • Services along trail not constant • Lack of amenities • Lack of signage on trail and at intersections • No idea about distances • Gates (difficult to cross, too many) • No shuttle • Signage at trail head not clear/or non-existent • Lack of info about Trail, map is weak, no indication of key attractions • Logo • Cross-walk signage • No real research about Trail

Opportunities	<ul style="list-style-type: none"> • Get people off the Trail onto the road for a few Km (tie with Coastal Routes) • Partnerships with Parks • Link with heritage roads • Experiential/learning tours • More training to VIC staff about Trail • Topographic map • Day trips/2-day trips, etc. • Annual tip-to-tip race • “Traffic Report” to advise operators when groups are coming • Charity events • Parallel trail (horses in summer, cross-country in winter)
Threats	<ul style="list-style-type: none"> • ATVs

Central Region

Date: Thursday, August 11, 2005 (PM)
 Location: TIAPEI Boardroom, Charlottetown

Participants: Kevin Murphy PEI Hotel/Motel Association
 Nancy Murphy PEI Dep. of Development and Technology
 Mary Kendrick B&B and Country Inn Association
 John Callaghan PEI Parks
 Murray MacPherson PEI Snowmobile Association
 Ruth Sturz PEI Cycling Association
 Bernard Labelle (Seasoned cyclist)
 Kim Green Capital Commission of PEI Inc.

Strengths	<ul style="list-style-type: none"> • Tip to tip • Safe for families • Nice surface in most places • Beautiful, varied flora/fauna • Free for users • Through rural communities • Continuity • Flat • Convenient to do small treks • Clean air
Weaknesses	<ul style="list-style-type: none"> • Surface varies • Logo too old looking, says nothing about PEI • No shoulder • Linear • Too much in the country, users can't see the same sights as a car tourist • Gates • No good directions/signage in Charlottetown • Parking areas • No bike racks/places to lean bikes

<p>Opportunities</p>	<ul style="list-style-type: none"> • Identify which, if any, sections are good for road bikes • Sell connection from community to community • Identify amenities on map • Meet the locals, connecting with community centres • Fundraisers • Loop with varied distances/time frames • Shuttle • Urban product (add bike logos on paved shoulders) • Signage pointing to community products • Community maps with distances • Pre-book B&Bs along Trail • Stop areas (picnic tables, rest areas, shelters) • Paving sections of the Trail • Determine profile of cyclists/offer packages that answer their needs • Interpretation of flora/fauna/history • Day trips/day loops • Involve schools • Link to cycling sites/promote in specialized publications • B&Bs website – map with close accommodations • Paved urban centres with links to key attractions/products
<p>Threats</p>	<ul style="list-style-type: none"> • Media (creates fear factor) • Graffiti/vandalism of signage

Appendix 3
Expert and Key Informant Interviews

The following interviews were conducted by Liette Lavallée:

Shane Arbing	PEI Parks
Chris Jones	PEI Tourism; Policy, Planning & Research
Leo Gill	PEI Transportation and Public Works
John MacQuarrie	Cross Country Ski PEI
Ken Crocken	Festivals and Events PEI
David Fullerton	Freewheeling Adventures
Angela Chisholm	Scott Walking Adventures
Peter Williams	Bike Riders Tours
Peter Oickle	Atlantic Canada Nature Safaris

The following interviews were conducted by Eric Riordon:

Greg Arsenault	PEI Tourism; Marketing
Grace Blackette	Island Trails; Volunteer
John Bellini	Trans Canada Trail Foundation
Stephen Burnett	Burnett Thorne Cultural Tourism
Don Cudmore	TIAPEI
Ron MacNeill	PEI Tourism
Murray MacPherson	PEI Snowmobile Association
Brendon McGinn	Island Trails
Shane MacDougall	Central Development Corporation, PEI
Doug Murray	Island Trails director and rep to TCT
David Thompson	Inns of Distinction

Appendix 4
A. Dutch Cycle Network



B. Le Petit Train du Nord

Interesting links:

<http://www.laurentides.com/francais/parc/ima/ge/Cartes/rive-nordfr/rive-nordfr-1.jpg>

<http://www.laurentides.com/francais/parc/ima/ge/Cartes/rive-nordfr/access-rive-nordfr.jpg>

Profil du Parc linéaire

