

Squamish–D’Arcy Bikeway: Cycle Tourism Economic Research

Appendices

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Document history

Date	Change
April 17, 2026	Added a missing reference to Appendix C
April 16, 2026	Initial version shared

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Appendix A: Operational Recommendations

Fourteen recommendations for getting the most economic value from the corridor, in approximate order of priority. These are planning-level recommendations intended to inform feasibility study design decisions — not an operational plan. They are most valuable if acted on before the corridor opens, when design decisions are still reversible.

1. First Nations as partners, not stakeholders. The bikeway crosses three First Nations territories. Partnership means co-governance, revenue participation, and cultural programming owned by Lil'wat and N'Quatqua. The commercial stops at Mount Currie and D'Arcy are already Indigenous-owned; the bikeway multiplies their customers.

2. Northern service gap: start the work now, not at opening. Pemberton to D'Arcy is the binding constraint on the upper economic scenarios. Conversations with NDIT, N'Quatqua, and Lil'wat economic development offices need to start now.

3. Design for emergency access. Highway 99 is the sole road access to corridor communities. A bikeway surface spec that accommodates emergency vehicles — width and grade sufficient for an ambulance or fire truck at low speed — provides a second access corridor when the highway is closed. This does not require highway-standard construction.

4. Non-motorized designation. Formally designate the corridor for cyclists, e-bikes, and pedestrians only — no ATVs, motorbikes, or combustion vehicles. Establish this in the RoW agreement and signage plan from the start.

5. Design for year-round use. The lower corridor runs at coastal elevation and is potentially rideable year-round. If the surface spec supports grooming, it could offer a long-distance winter fatbike experience accessible from Metro Vancouver — an unusual product for a corridor of this length.

6. Make bikes and e-bikes on transit a priority. One-way itineraries only work if transit carries full touring setups, including e-bikes with integrated batteries. Current BC Transit policy requires battery removal for e-bikes, which is impractical for touring bikes. Any new passenger rail service on this corridor should be designed from the start to accommodate touring bikes and e-bikes.

7. E-bike charging at every commercial node. Every accommodation and food stop should have accessible outdoor e-bike charging at opening. Cost is low; absence appears immediately in reviews and turns away the fastest-growing cycle tourist segment. Make it a criterion for accommodation accreditation. (*Ontario By Bike 2025*)

8. Luggage transfer services. Luggage transfer opens multi-day itineraries to riders who cannot manage full panniers. The Véloroute des Bleuets runs this model on a 256 km loop without subsidy. Signal the market early so existing shuttle operators enter it. Include it in the bikeway's accommodation directory from opening. (*Véloroute des Bleuets, veloroutedesbleuets.com*)

9. Accommodation accreditation. A cycling-friendly accommodation program gives riders confidence and operators a marketing credential. Secure bike storage is the single most important amenity. *(Schoen, Rail Trail Readiness guidebook, CFNO 2025)*

10. Two separate marketing campaigns: short-haul and international. Metro Vancouver and Vancouver Island need a low-barrier itinerary message. International visitors need the corridor documented on Komoot, RideWithGPS, and in international cycling media in multiple languages. These two audiences differ enough in motivation, information needs, and booking behaviour that a single campaign is unlikely to serve both effectively.

11. Measure from day one. Trail counter placement and an ongoing visitor survey program for the corridor generates systematic economic data from opening day. A corridor that measures usage and economic impact strengthens every future funding application it makes.

12. Trail ambassador program. The Okanagan Rail Trail runs 60–80 volunteers logging 1,200–2,400 hours/year as “eyes and ears” — reporting hazards, modeling etiquette, answering visitor questions. The program costs almost nothing beyond coordination. Design a comparable program from opening day, anchored in Squamish, Pemberton, and D’Arcy. Ambassadors reduce liability exposure, improve visitor experience, and build the volunteer base that sustains the trail long-term. *(Okanagan Rail Trail Society)*

13. Business readiness along the corridor. Trail traffic doesn’t automatically translate into economic benefit. Businesses 300 metres from a trail may see no trail visitors without signage, reliable hours, and basic amenities. A business readiness program — workshops, coaching, simple checklists — should reach businesses in Squamish, Pemberton, and D’Arcy before the bikeway opens. *(Schoen, Rail Trail Readiness guidebook, CFNO 2025)*

14. Build grant and fundraising capacity early. The FORT society raised \$467,000 in grants and public donations over four years while operating on \$18,000/year from managing jurisdictions. That leverage only works if donor relationships, grant tracking, and community foundation connections are built before the money is needed. *(FORT Rail Trail Society)*

Appendix B: Supporting Research

Reference material underlying the economic arguments in the main document. Organized by topic; each sub-section can be read independently.

Comparable Trail Data and Methodology

Methodology differences across studies. The five primary reference trails in Section 1 use different economic models. The Great Allegheny Passage uses Fourth Economy's trail-tourism methodology. The C&O Canal Towpath uses the National Park Service's Visitor Spending Effects model (VSE). The KVR, P'tit Train du Nord, and Alps 2 Ocean each use their own survey-based frameworks. Each uses an established, documented methodology, but the figures are not directly additive or strictly comparable. The C&O visitor count includes all park visits, not cycle tourism specifically. The P'tit Train passage count includes all users (cyclists, walkers, snowmobilers). Dollar figures are converted to CAD at April 2026 rates (USD/CAD 1.375; NZD/CAD 0.80).

Trail profiles not in the Section 1 reference table. The following trails are referenced elsewhere in this document and provide additional context.

Otago Central Rail Trail (South Island, New Zealand)

Type: Rail conversion. Distance: 152 km (Middlemarch to Clyde). Grade: <2% throughout. Surface: Gravel (former rail bed). Annual visits: 10,000–14,000 full-trail riders annually (Jellum & Reis 2009). NZCT counter data: 80,380 total trail passes (year ending June 2021); 21,808 (year ending June 2025) — 73% decline. Average trip duration: 4 days. Annual economic impact: No published total impact figure. Daily visitor spend NZ\$472–582 (2008–2011, growing). Business dependency: 80% of accommodation providers attribute >20% of annual revenue to trail visitors (2005 Trust survey).

The OCRT is the most important comparable for the northern section of the proposed bikeway. Central Otago is remote and sparse — Middlemarch, Ranfurly, Omakau, Ophir, Naseby, and Clyde are small rural communities with limited pre-trail tourism infrastructure. The trail created the visitor economy, not the reverse. Business dependency data from a 2005 Trust survey: 64% of accommodation providers operating before the trail opened attributed more than 20% of their turnover to trail visitors. After opening, 80% attributed more than 20%; 53% attributed more than 60%.

Ridership decline: NZCT counter data shows total OCRT trail passes fell from 80,380 (year ending June 2021) to 21,808 (year ending June 2025) — a 73% decline. Two factors are at work. The 2021 baseline was almost certainly COVID-inflated: New Zealand's border closures through 2021 redirected domestic tourists to regional trails, temporarily boosting pass counts above historical norms. Part of the decline is reversion to a more normal baseline. The remainder reflects competition from two major new regional trails: Lake Dunstan Trail (71,614 recorded users in its opening year) and Clutha Gold Trail (+126% in the same period). Neither factor is evidence of cycle tourism decline; the picture is one of baseline normalization plus market redistribution within a growing regional trail network.

The OCRT's catchment is small and rural with no major urban anchor, making it vulnerable to visitor diversion in ways a Vancouver-catchment corridor is not.

Sources: Jellum & Reis 2009, Otago Polytechnic; OCRT Working Group 2011; NZCT, 2025 Evaluation of Ngā Haerenga Great Rides of New Zealand, November 2025

Great Taste Trail (Nelson-Tasman, New Zealand)

Type: Multi-surface (gravel and paved). Distance: ~200 km. Grade: Gentle (vineyards, coastal, river valley). Annual visits: 419,000 trail counter passes (majority local repeat users); ~20,500 visiting cyclists attributed to the trail. User satisfaction: 8.5/10. Annual economic impact: NZD \$34M (~CAD \$28M) from visiting cyclists. Impact per km: ~\$140k CAD/km/year.

The Great Taste Trail is the most current NZ Great Rides study available. The food-and-wine overlay (Nelson-Tasman is NZ's artisan food and wine region) drives above-average spending at local producers along the route. Dense tourism infrastructure throughout — no remote service gap comparable to D'Arcy. Higher \$/km than OCRT reflects this infrastructure density. The proposed bikeway sits between these two NZ comparables: stronger anchor than OCRT, larger service gap than the Great Taste Trail.

The trail suffered severe storm damage in June 2025 (>\$2M repair cost; fully closed pending repair). MBIE's out-of-round emergency fund was activated. A cautionary note on climate risk to trail infrastructure.

Sources: Angus & Associates, Social and Economic Impact Assessment, March 2024; Nelson Tasman Cycle Trails Trust Strategic Plan 2025–30

Véloroute des Bleuets (Lac Saint-Jean, Quebec)

Type: Rail conversion + paved road shoulder (loop). Distance: 256 km loop. Grade: Flat. Annual visits: ~110,000 (2017); 300,000+ (2021 onward). Annual economic impact: CAD \$11.56M (2016/17 study); estimated ~\$15–16M by 2021–22. Communities served: 14 municipalities. Management model: Véloroute des Bleuets Inc., a non-profit corporation since 1997; 60 patrol ambassadors.

Primary value as a comparable is operational rather than economic. Two services operate without subsidy that are directly relevant to the proposed bikeway: a luggage transfer service (van picks up bags at accommodation and delivers to the next stop, removing the pannier barrier for riders who cannot manage full loaded touring), and a certified accommodation network (properties meeting cycling-friendly criteria listed in the trail directory). Both have run since 1997 without interruption. Most popular commercial package: 5 days / 4 nights.

Sources: Véloroute des Bleuets (veloroutedesbleuets.com); Raymond Chabot Grant Thornton economic impact study, 2017; Vélo Québec, Bicycling in Quebec 2005

Monterey Bay Sanctuary Scenic Trail (California, USA) — Rail-Adjacent Model

Included specifically for feasibility and safety evidence, not economic benchmarking.

Type: Rail-adjacent — separate trail right-of-way alongside active Union Pacific freight rail. Distance: 80 km (Monterey to Santa Cruz). Status: 7.5 miles operational; 18 miles funded (\$102.6M in ATP grants); full trail opening 2027–2030.

The most relevant structural model for the proposed bikeway: a paved multi-use path built on a separately registered right-of-way running alongside an active freight rail corridor, with grade separation and safety fencing. North American safety record: a 2013 RTC safety audit found only 1 fatality and 2 injuries across US rails-with-trails studied. As of 2025, there are 450+ operational rails-with-trails in the US totalling 1,132+ miles alongside active rail corridors, establishing this as standard practice. Construction cost: approximately USD \$2.2M/km (~CAD \$3M/km).

The Saluda Grade Rail Trail (South Carolina/North Carolina, 50.7 km) is a complementary reference: a trail alongside a preserved (not active) rail corridor, with a 2024 Clemson University study projecting \$20–27M/year annual impact once open.

Sources: Transportation Agency for Monterey County; Rails-to-Trails Conservancy 2025; Clemson University, Saluda Grade Rail Trail economic study, 2024

Network maturation evidence

Per-trail figures understate the long-term case because cycling trail economies grow as regional networks mature. Two jurisdictions with population comparable to BC:

New Zealand: The 23 Ngā Haerenga Great Rides generated CAD \$1.02B in visitor spending for the year ending June 2025, up 35% from 2021. Trail-adjacent businesses grew from 1,600 in 2021 to 2,900+ in 2025. Per-visitor spending rose from NZD \$892 to NZD \$960+. After 17 years of network development, cycling tourism in New Zealand now exceeds the economic value of its cruise tourism and Māori tourism sectors. (NZCT 2025 Evaluation; sector comparison per Cycle Journeys / MBIE, January 2026.)

Quebec: Cycling tourism generated CAD \$803M in tourism spending in 2024, including CAD \$142M from out-of-province visitors. The sector supports nearly 6,400 jobs and contributes CAD \$467M to provincial GDP. The Route verte, at 5,300 km the longest designated cycling route in North America, has been coordinated by Vélo Québec since 1995.

Sources: NZCT, 2025 Evaluation of Ngā Haerenga Great Rides; Vélo Québec / Observatoire du vélo / Chaire de tourisme Transat, 2024 economic impact study

Cycle Tourist Visitor Profile and Spending

Demographics: Ontario By Bike survey data (2025)

The most comprehensive Canadian cycle tourist surveys available, and the best current proxy for the demographic the proposed bikeway would attract.

Characteristic	Data
Age	45–64 years: 45% 65+: 37% Under 45: 18%
Employment status	Retired: 47% Employed full-time: 35% Part-time/other: 18%

Characteristic	Data
Household income	Over \$100K: 61% \$75–100K: 19% Under \$75K: 20%
Accommodation spend	Over \$100/night: 65% \$75–100: 20% Under \$75: 15%
Bike value	Over \$2,000: majority E-bike ownership: 28% (up from 17% in 2021)
Annual cycling trips	3+ overnight trips/year: majority of respondents
Trip length	3–5 days most common; 6–7 days significant minority

Source: Ontario By Bike cycle tourist surveys, 2025.

E-bike trend

E-bike ownership among cycle tourists has grown from 17% (2021) to 28% (2025), the fastest-growing equipment trend in the segment. Growth concentrated in the 65+ cohort. E-bike users travel 30–40% further on comparable terrain, effectively expanding a 100 km trail into 130–140 km of reachable territory per day. The 2.2% maximum grade is already gentle enough for conventional cyclists; e-bikes make the full corridor accessible to the broadest possible market, including mixed-ability groups and older adults who would otherwise self-select out.

Sources: Ontario By Bike 2025; Destination BC, Cycling Sector Profile 2025

Spending benchmarks: international comparison

Source	Spend figure	Notes
German multi-day touring cyclists (ADFC, 2024, n=4,516)	€117/day (~CAD \$170). Accommodation: €53, Food: €28, Transport: €14, Other: €22	Largest European cycle tourist survey. German market is a significant source of long-haul cycling tourists to Canada.
Quebec cyclists travelling for cycling (Vélo Québec / Georgian Bay Cycling Route Feasibility Study, 2014, citing 2005 data)	\$83/day vs. \$66/day for regular tourists (+26%). Most popular multi-day package: 5 days / 4 nights	2005 CAD; dated but directional finding consistent with all subsequent research.
Great Waterfront Trail Adventure participants (Ontario, August 2025)	\$1,309 avg per-participant (8-day guided event, 640 km). Hotel-stayers: \$1,618. Campers: \$741. 28% extended stays (61 additional hotel nights).	Most current Canadian event-based data. Hotel-vs-camping differential directly relevant to accommodation planning for D'Arcy.
BC touring couples (Shuswap North Okanagan Rail Trail, Schoen 2025)	\$150–400/night lodging; \$60–120/day meals	Most current BC trail data. Upper end represents Comfort-tier couples on B&B itineraries.
OCRT visitors: growth trajectory (OCRT Working Group 2011)	Daily spend: NZ\$472 (2008) → NZ\$582 (2011), +23%. Annual visitors: 10,000 → 14,000, +40%	Demonstrates per-visitor spending increases as trail reputation grows. First-year figures are the floor.

Cycle tourist typology: Beierle's three tiers (2011)

A field study of the TransAmerica Trail identified three economic tiers among self-supported touring cyclists. Tier distribution matters for community planning: different infrastructure investments attract different tiers.

Tier	Daily spend	Accommodation	Rural economic profile
Shoestring	\$0–30/day	Camping, free lodging	Minimum local spend; grocery and convenience stores only
Economy	~\$50/day	Budget motels, hostels, some B&Bs	Moderate local spend; budget accommodation and diners
Comfort	\$75–100+/day	B&B, motel, or inn; avoids camping	Highest per-night impact; spends on accommodation, restaurant meals, local shops, experiences

The Pemberton–D’Arcy section is structurally suited to the Comfort tier. Comfort-tier visitors do not camp; they need real accommodation. The lack of accommodation at D’Arcy is a constraint that, if addressed, directly captures the highest-value visitor segment.

Source: Beierle, Cycle Touring and Rural Economic Development, TransAmerica Trail study, 2011. USD figures; directional findings applicable to Canadian context.

Commercial guided tour market

The Sea to Sky corridor already supports commercial guided cycling. Into the Wild operates a 5-day all-inclusive tour (Squamish–Whistler–Pemberton) at \$3,699 CAD per person; both 2026 departures sold out and 2027 dates are filling. Into the Wild previously offered a KVR Okanagan tour but cancelled it due to trail deterioration — a direct demonstration of what inadequate trail infrastructure costs the commercial sector. (*intothewild.ca; personal communication, April 2026*)

The broader BC guided cycling market confirms the price point this corridor sits within: Freewheeling KVR Okanagan (6 nights): guided \$6,225 CAD; self-guided \$5,795 CAD. Freewheeling Jasper–Banff (6 nights, guided): \$6,245 CAD. Backroads Vancouver–Gulf Islands (6 days, guided): ~CAD \$6,900–\$7,500. VBT Vancouver Island & Gulf Islands: ~CAD \$6,000; 10 departures in 2026, several at limited availability. These prices sit well above the self-guided KVR market (\$1,950–\$2,695 CAD). An international cyclist paying \$5,000+ for a BC tour spends additionally on pre/post-trip travel, accommodation upgrades, and local meals.

Sources: intothewild.ca; freewheeling.ca; backroads.com; vbt.com; kettlevalleyrailtrail.com

Rural Economic Development Patterns

The Maniototo transformation

The Maniototo subregion of Central Otago — Ranfurly, Omakau, Ophir, Naseby — had spent a stagnant decade before the Otago Central Rail Trail opened. Small agricultural and former gold-mining communities with declining populations and limited economic activity. By the mid-2000s, accommodation quality had improved, new tourism products had emerged (Naseby dark-skies accreditation, the Interplanetary Cycle Trail), and local businesses had revived. One community member: “If it hadn’t been for the Rail Trail, Ranfurly would have died.” Ranfurly, Omakau, and Ophir are comparable in scale and character to Mount Currie and D’Arcy.

Source: Bergen, Otago Central Rail Trail community study

Community resistance is normal and reversible

Bergen found Maniototo communities were initially resistant: farming identity was strong, skepticism about outsiders was common, some landowners actively opposed the trail. Resistance eroded as economic benefits became tangible. A 2024 systematic review of 22 US rural cycling case studies found the same pattern: rural cycling projects raise concerns about outsiders and cultural change, but communities that commit to trail-town development — signage routing to downtown, accommodation, volunteer networks — see positive economic and social outcomes. Communities that do not invest in trail-town development do not capture the economic benefit even when the trail passes through.

Sources: Bergen, Otago research; Leichenko, R. & Taylor, C., 2024

Low-barrier rural economic entry points

Communities without accommodation don't need to wait for a hotel to start capturing trail economic benefit. The Shuswap North Okanagan Rail Trail permit structure explicitly allows on-trail farmstands — a roadside stand selling produce, baked goods, or refreshments to passing cyclists requires no capital investment and no zoning change. For D'Arcy, a farmstand at the N'Quatqua store is the lowest-barrier first step.

Source: Schoen, Rail Trail Readiness guidebook, Community Futures North Okanagan, 2025

First Nations Partnership Precedents and Context

Communities and territories along the corridor

The bikeway passes through the traditional territories of three Nations: Sḵwx̱wú7mesh (Squamish Nation) from Squamish through the Cheakamus Canyon; Líl'wat7úl (Lil'wat Nation) through Whistler, Pemberton, and Mount Currie; and N'Quatqua First Nation at D'Arcy. St'at'imc (Lillooet First Nations) territory lies beyond D'Arcy and is relevant to any future northward extension.

Commercial infrastructure already in place

Mount Currie: Lil'wat-operated store; the only resupply point between Pemberton and D'Arcy. D'Arcy: N'Quatqua-operated gas station, store, and post office; the terminus of the bikeway.

Cultural centres on the corridor

The Squamish Lil'wat Cultural Centre (SLCC) in Whistler, operated jointly by Squamish Nation and Lil'wat Nation since 2008: cultural centre, longhouse, café, artist gallery, year-round cultural programming. Sits directly on the bikeway corridor. The Líl'wat7úl Culture Centre at Mount Currie is open to visitors and maintains active cultural programming. (slcc.ca; lilwat.ca)

The Great Blue Heron Way precedent

Elder x^wasteniya's project to reconnect First Nations communities along waterside pathways "as they once were connected." A 3 km section on Tsawwassen First Nation territory at the Fraser Estuary was built in 2017. The larger vision extends through Musqueam, Squamish, and Tsleil-Waututh territories. Nations along the Squamish–D'Arcy corridor may or may not frame this bikeway in comparable terms — that is their decision. The precedent establishes that First Nations leadership in trail meaning is well-established in BC, and that cycle tourism benefits can sit within a larger cultural and reconnection frame rather than replacing it. (*Tsawwassen First Nation*)

Partnership models

Co-ownership and revenue participation are the standard many Nations now expect as a condition of support for major corridor projects. Partnership models worth exploring: Nation involvement in trail governance and stewardship; cultural interpretation nodes at Mount Currie and D'Arcy developed and owned by Lil'wat and N'Quatqua; revenue-sharing from bikeway user fees or associated tourism levies; preferential contracting for trail maintenance and construction.

Political groundwork

The January 2026 letter to Prime Minister Carney and Premier Eby on the CN Rail corridor was co-signed by Lil'wat, Squamish, Tsal'alh, and Tsleil-Waututh First Nations alongside MLA Jeremy Valeriote and MP Patrick Weiler.

Multimodal and Transit Integration

Amtrak Capitol Limited as operating precedent

The GAP/C&O corridor (Section 1) is paired with Amtrak's Capitol Limited, which parallels the route with roll-on bike service enabling ride-one-way, train-return itineraries. This model has become central to the corridor's usage pattern and is the closest operating analog to what the proposed bikeway could offer if passenger rail operates on the CN Squamish Subdivision.

Shoulder season extension via multimodal

The rail-adjacent configuration creates a structural advantage for shoulder season: arrive-by-train, ride-one-direction itineraries that do not depend on driving weather. Headwinds, cold mornings, and variable shoulder-season conditions that discourage conventional cyclists are manageable with e-bike motor assist. E-bike adoption is growing fastest in the 65+ cohort — the same segment most likely to travel in shoulder months (flexible schedules, not tied to school holidays or summer employment).

Sources: Ontario By Bike 2025; Destination BC 2025

BC winter trail use

The Shuswap North Okanagan Rail Trail (opened 2025) documents that even without grooming or plowing, trails “are still used in winter for walking, ice cleats, fat biking, and intermittent cross-country skiing.” Schoen explicitly recommends communities treat the trail as “a four-season asset from the outset.” Winter trail walkers — seniors groups, families — become “consistent year-round customers when welcomed well.” The guide frames winter as a distinct commercial season: hot soup, cozy seating, gear sales, holiday markets near trailheads.

Source: Schoen, Rail Trail Readiness guidebook, Community Futures North Okanagan, 2025

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