



Centre for
Trail Excellence

National Trail Sector Survey Results

March 2022





Table of Contents

Introduction	3
Survey Summary.....	5
Respondent Demographics	7
Key Findings	11
• Trail General Information.....	12
• Accessibility & Inclusion	13
• Nature & Climate	16
• Employment	18
• Organizational Capacity.....	19
• Projects & Investment	21
• Tourism	24
• Trail Maintenance.....	27
• Trail Volunteers.....	29

Introduction





Introduction

In an effort to better understand the trail sector in Canada, Trans Canada Trail launched a comprehensive national trail sector survey in March 2022.

Topics

- Accessibility and Inclusion
- Nature and Climate
- Employment
- Organizational Capacity
- Projects and Investment
- Tourism
- Trail Maintenance
- Trail Volunteers

The **national trail sector survey** was directed to people who work and volunteer in the trail sector in Canada and covered topics that were relevant to organizations managing trails across the country.

These trail organizations included not-for-profit trail groups, Indigenous communities, municipalities, counties, districts, and provincial and territorial government departments responsible for trails.

A photograph of two cyclists riding on a dirt trail through a forest. The cyclist on the left is wearing a purple jacket and a yellow and black helmet. The cyclist on the right is wearing a red jacket and a black helmet. The trail is covered in brown leaves and pine needles. The forest has tall, thin trees and a mossy ground.

Survey Summary

Survey Summary

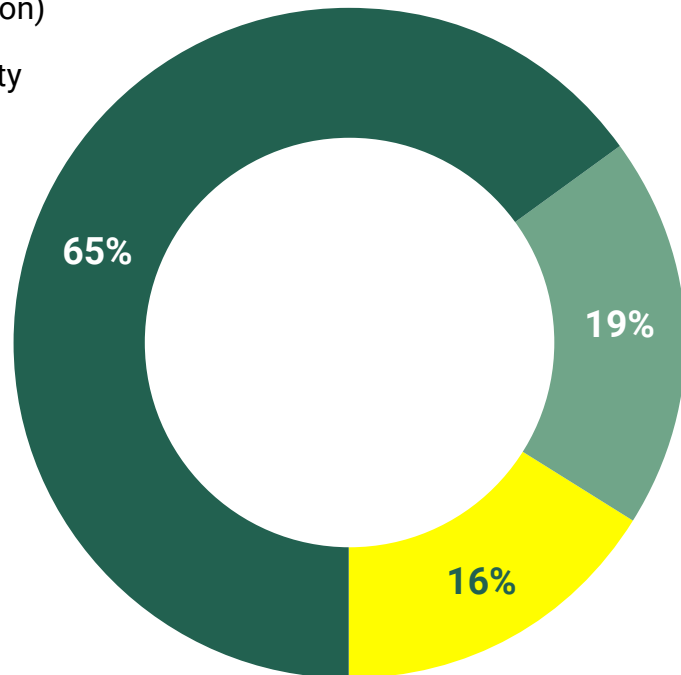
- Survey period: March 15 to April 8, 2022
- The survey was distributed online to partner groups as well as shared through social media.
- A total of 264 responses were received, with respondents located in all 13 provinces and territories.

Respondent Demographics



Community size

- 65% of respondents' trails are in a small community (<30,000 of population)
- 19% in a medium size community (<100,000 of population)
- 16% in a large centre (>100,000 of population)



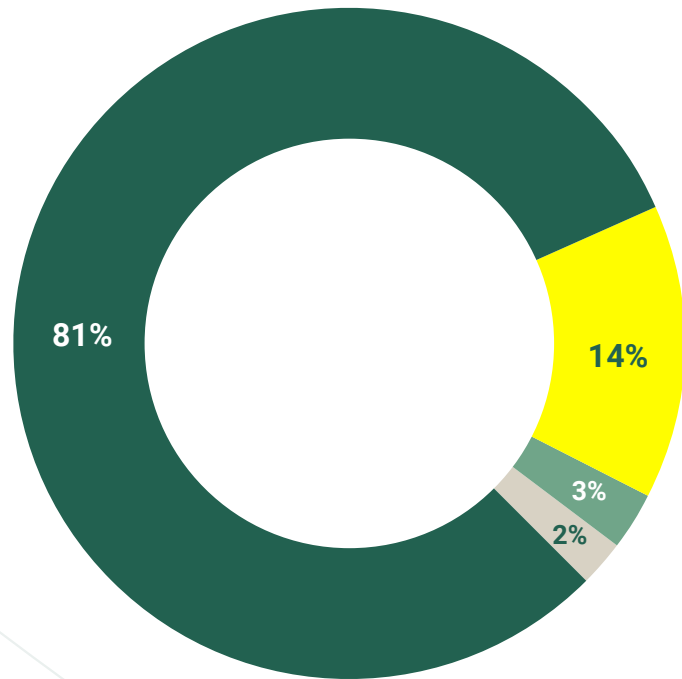
Location

Respondents were located in all 13 provinces and territories.



Operating language

- English
- French
- Indigenous languages
- Other languages

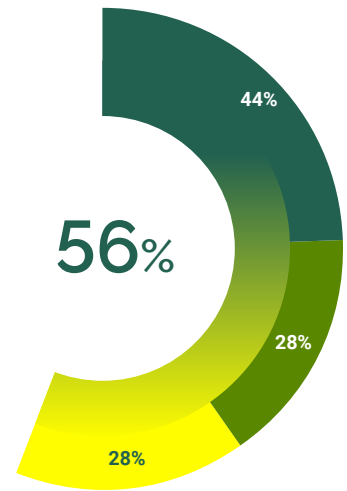


Type of organization represented

56% of respondents represented **community-based, non-governmental trail organizations**, including:

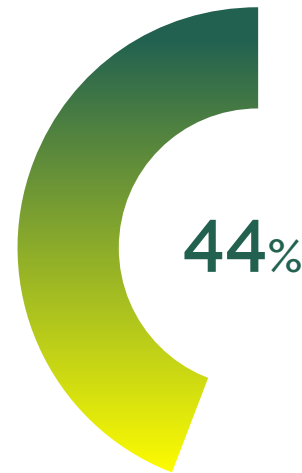
- 44% registered charities
- 28% non-profit organizations
- 28% primarily community-based organizations

93% of these groups have fewer than 10 people involved in managing and operating trails



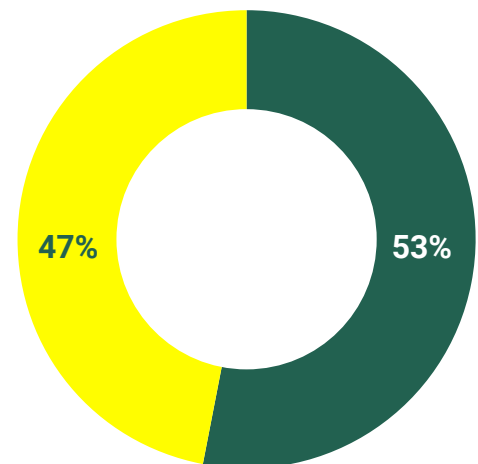
44% of respondents represented **governmental organizations**, including:

- Largely municipal: 87%
- Relatively small departments: 54% have fewer than five people involved in managing and operating trails
- Most common departments responsible for trails:
 - Parks and Recreation
 - Transportation and Infrastructure



Role Within Community Group Organizations

- Volunteers
- Paid staff



Key Findings



Trail General Information

86% of respondents' trails are part of the Trans Canada Trail network

36% of respondents are affiliated with a regional trail network

35% of respondents are affiliated with a provincial trail network (i.e., Route Verte, Blue Route)

Most respondents manage or operate under 200 km of trail.

44% manage less than 25 km of trail

37% manage between 26 and 100 km

29% manage more than 100 km

Accessibility & Inclusion

64%

of respondents report their trails are accessible, to a certain extent, for people with disabilities.





8%

of respondents indicated that the nearest population was predominately Indigenous.

Of these respondents, **85%** indicated that they regularly collaborate with non-Indigenous groups for projects.

Of the respondents that indicated that the predominant population near their trail was non-Indigenous, only 38% regularly collaborate with Indigenous groups for projects.

12% of respondents said that among their staff, no members identified as women.

86% of respondents reported they were not aware of any gender diverse staff members or participants.

19% of respondents reported they were not aware of any gender diverse participants in trail maintenance and other activities.

45% of groups are using Diversity, Equity, Inclusion and Accessibility (DEIA) principles in their hiring practices.

42% of groups reported that they have members of their trail staff who are Black, Indigenous, or People of Colour (BIPOC), and **31%** of groups reported that there are BIPOC staff involved in the management of trails.

18% of groups said that there are no BIPOC participants at trail maintenance days, trail events, and other public activities, and **53%** said that only 1-16% of participants are BIPOC.

66% of respondents indicated they did not review their trail names with respect to impact on trail users.

More than half of respondents are interested to learn more about DEIA. The respondents prefer to learn DEIA-related material through:

- Webinars
- Self-paced online courses



Nature & Climate

Half of respondents believe that their organization has the capacity to manage the impacts of climate change.

Interestingly, **41%** of groups expect that their current infrastructure can withstand the impacts of climate change; however, **71%** indicated that major repairs are needed now or very soon.

43%

of respondents mentioned that their trails are located in a **conservation** or **protected area**.

Respondents indicated these **top 5 measures** are needed to address the impact of climate change on their trails:

- 1 Flood mitigation
- 2 Rebuilding infrastructure
- 3 Invasive species removal
- 4 Tree planting
- 5 Management of shoulder season

66%

of respondents indicated that if tree planting were an option for a reduced cost, they would be interested in doing this on parts of their trail.



Employment

There is a close split between groups that hire and do not hire temporary staff.

Of those that do: **37%** hire between **1** and **4** staff.

Almost all temporary staff are students working on trail construction/maintenance and **47%** are for terms lasting **4-6 months**.

The most challenging areas in which to find qualified staff are:

- Fundraising
- Indigenous expertise
- Habitat restoration

If offered quick labour at no or low cost to the group, **61%** indicated that they would participate.

However, with no cost to the group, **39%** of groups would not hire staff, suggesting that they may not have the capacity for the administration of staff.



Organizational Capacity

57%

of respondents have less than
\$20,000 of annual budget.

83%

of respondents have less than
\$125,000 of annual budget.

52% of respondents don't have reserve funds.

24% of respondents have a reserve fund for more than **12 months**.

55% Slightly more than half of respondents indicated that their trail organization has a strategic plan (length between **2 to 10 years**).

67% of respondents indicated that their organization conducts a trail audit annually.

65% of respondents indicated that their organization conducts a signage audit annually.

The **top 5 investments** to meet user expectations, as identified by respondents, are:



These investments are prioritized over **tourism promotion, communications & marketing, digital resources, management of user behavior** and **e-devices**.

It appears that while most respondents indicated that trail maintenance & sustainability is their focus, financial support (**88%**) is needed to overcome challenges.

Projects & Investment

88%

of respondents have projects ready to be implemented in 2022 or 2023.

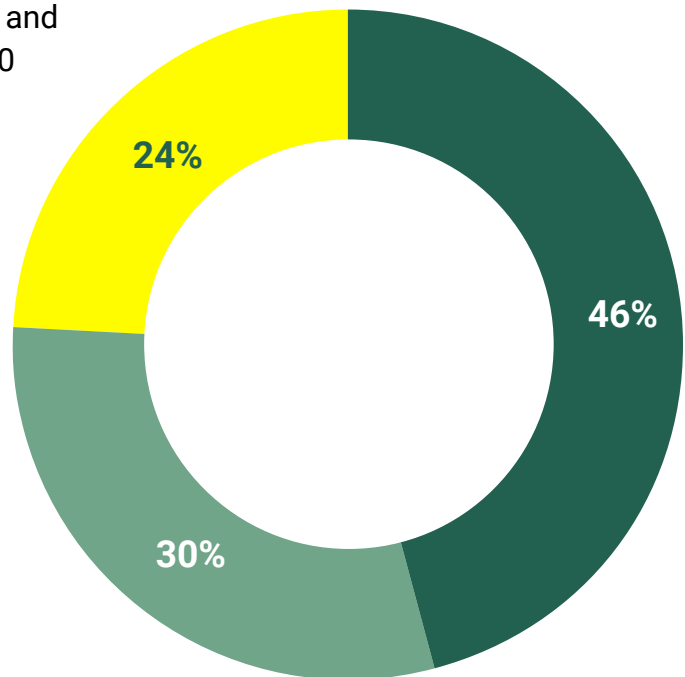


Top 5 types of trail projects undertaken in 2022 and 2023:



The main limitation to undertaking a project is **insufficient budget**.

- 46% of trail projects undertaken in 2022 and 2023 have a total budget under \$100,000
- 30% are between \$100,001 and \$200,000
- 24% are above \$200,001



44%

of respondents received funding from their provincial/territorial government to undertake their 2022 and 2023 projects.

If more budget and resources were available, the top 5 project types that respondents would like to undertake would be:

Investment in the major infrastructures (bridges, culvert, sidewalks...)

Resurfacing

Trailhead, major signage projects

Bridge remediation

Amenities repairs

Tourism

98%

of trail organizations think that their trails are tourism assets.

50%

think their trails are tourism assets for international visitors.

78% of trail organizations know that their trails are actively promoted, at least in their regional market.

10% know that their trails are internationally marketed.

85% of respondents said that the vast majority of trail users visit for a single day.

20% of respondents have websites with trail maps, trip planning tools and up-to-date information about the trail condition. **52%** only have a map. **28%** don't offer a trip planning tool.

20% of respondents have sufficient staff, resources, infrastructures and tools required to effectively welcome and support visitors to their trail.

50% of respondents do not have a relationship with, or receive support from, Destination Management Organizations (DMOs).

27% have relationships with a **regional** DMO.

20% have relationships with a **provincial** DMO.

3% have relationships with a **national** DMO.

72%

of trail organizations have at least one event offered by themselves or others on or adjacent to their trail.

Respondents identified the following **top 5 unique selling points** for their trail:

- 1 Geographic uniqueness
- 2 Uniqueness of trail infrastructure and activities
- 3 Canadian heritage and cultural experience
- 4 Conservation and educational experience
- 5 Indigenous heritage and cultural experience

Respondents identified the following **top 5 challenges** they are facing when developing a trail tourism strategy:

Trail infrastructure conditions

Lack of municipal infrastructure and services

Marketing

Mapping and GIS limitation

Concerns of the host communities about tourism (overcrowding, etc.)

Trail Maintenance

35%

Over one-third of respondents indicated that they could soon see trail closures due to major infrastructure failures.



Respondents indicated the **top 5 priority areas** where additional investment and/or work would be required in order to maintain trail systems to meet user expectations and local trail building standards:

1 Maintaining infrastructure

2 Trail sustainability

3 Installing and maintaining adequate signage

4 Environmental issues

5 Increased use

35% Only 35% of respondents have enough capacity to perform all the necessary maintenance on their trail to reach high quality standards.

67% Over half of respondents lack the funds required to hire adequate staff to effectively manage their trail.

55% According to respondents, approximately 55% of trails are maintained on a monthly basis, at minimum.

Trail Volunteers

76%

Most groups seek the assistance of volunteers, and almost **50%** of those groups do so for every project they undertake.

40% of respondents who use volunteers reported logging more than **250 volunteer hours** per year.

46% of respondents indicated the most common average age of volunteers is **45-60**, with another significant portion aged **older than 60**.

The most **significant challenges** facing groups include:

- Volunteer availability, recruitment
- Willingness to do 1-day tasks only
- A lack of skills/knowledge of how to perform trail-specific work

Financial support was cited by **56%** of groups that engage volunteers as the number one resource that would help them overcome these challenges.

Overall, groups reported that engaging volunteers with specific skills is challenging, with the following being the most challenging skills to find:

- Infrastructure building
- Fundraising
- Administration

Thank you!

Thank you to everyone who participated in the survey.
We deeply appreciate you sharing your insights,
allowing us to better understand the trail sector in Canada.

For more information please contact:

info@tctrail.ca



**Centre for
Trail Excellence**