

# Trail Impacts - 2011 and Beyond

## Regional Tourism Organization 12

Prepared for Sustainable Trails and Partners

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## Our Thanks to RTO12

- RTO12 is a newly created not-for-profit organization aimed at creating a unique brand and stellar experience for tourists visiting the Georgian Bay region
- Includes parts of the District of Parry Sound, the District of Muskoka, Algonquin Provincial Park, and the Township of South Algonquin
- Its mandate includes marketing, product development, performance management and research while engaging regional partners and stakeholders in the development of the regional tourism industry
- One of the priorities of RTO12 is to have a better understanding of the potential of outdoor recreation in becoming a trademark for the development of tourism in the region

# Project Goals

- To gain a better understanding and knowledge of the current state and future use of all recreation trail activity
- Detail the development of trails in RTO12
- Outline the current status of trails in the region
- Make recommendations for the direction of future trail development.

# About Ontario's Trails

- In Ontario there are over 88,000 kilometers of trails
- These trails are found in over 430 different cities, towns, hamlets etc
- The Ontario Trails Council tracks these trails by 18 different uses
- It is estimated trails generate over 6 billion in economic impacts
- 2010 saw 171 projects totaling 78 million in construction dollars

# About Ontario's Trails

- No single provincial trail tourism plan
- Some single use tourism strategies
- No trail tourism matrix re-capture organization
- Limited re-capture on existing investments
- Part of Outdoor Experiences
- Regional Initiatives are single operator, use or brand dominated
- The partners in this project believe this is a groundbreaking exercise that allows for a provincial model of a trail tourism development pathway

# Trails Tourism and Trails

- Part of outdoor tourism
- No single trail marketing plan
- No single government support plan
- Trail tourism single brand, use or strategy dominated region to region
- No single trail matrix initiative
- Largely under measured and under-reported
- RTO12 is the only RTO currently including trails in their destination development plans

## About RTO 12 Trails

There are many types of trails in the RTO and they tend to fall into characteristics such as:

- scenic
- historic
- tourism
- natural
- motorized
- non-motorized

In the region we have identified 194 trails, with over 92% supporting multi-use activity.

## About RTO 12 Trails

- There are approximately 5,500 kilometers of trail and many trails in the area are multi-use
- When calculating RTO12's kilometers of trail per each user type, the number of kilometers combined equaled over 8,000
- Fully 16% or 1/7 of the land based inventory of trails and trail opportunities in Ontario - exist in RTO12



## About RTO 12 Trails

- Snowmobiling trails are usually stand-alone, destination trails, much longer and more connected
- ATVing trail kilometers are under-represented, it is hugely popular in the area and better support could enable it to coexist on more trails
- Hiking has the largest *number* of trails but has a quarter of the *length* of trails snowmobile trails do
- Hiking trails in the area aren't destination trails, they are too short (but are used on day trips) need a trail to fill this void
- Local experience opportunities
- Hiking and snowshoeing are often found as user-types on the same trail – there is room for this connection to be made on more trails with little extra maintenance required for added usage

# About RTO 12 Trails

- Trails are used by 7 major uses:
  1. hiking/walking
  2. cycling
  3. snowshoeing
  4. ATVing
  5. snowmobiling
  6. equestrian
  7. cross country skiing
- As in most other regions of Ontario non-motorized hiking or walking trails dominate the inventory landscape (again, are often shorter, day trip trails)
- These trails, while high in number do not produce the same per trail or per trip economic impact as other motorized uses.

# Return per Trip by Use

- Snowmobiling – \$157.13
  - Equestrian – \$92.82
  - Running – \$78.50
  - ATV – \$43.00
  - Snowshoeing – \$39.05
  - Cycling – \$22-25.00
  - Hiking/Walking – \$10.30
- Indicate the financial advantages for the customer

## Return per Trip RTO12

- Hiking and walking – 1000km divided into 10.30 = \$.0103 returned per km used
- Cycling – 850km divided into 22.00 per trip = \$.025 returned per km used
- Cross country skiing – N/A
- Snowshoeing – 700km divided into 39.05 = \$.056 returned per km used
- ATViing – 750km divided into 43.00 = \$.057 returned per km used
- Snowmobiling - 4750km divided into 157.30 = \$.033 returned per km used
- Equestrian - 80km divided into 92.82 = \$1.16 returned per km used

## Regional Trail Tourism

- We find that Muskoka has roughly 50-75% more trail than any of the other three regions
- Muskoka has nearly the same amount of trail tourism activity as the other regions combined, based on trail location
- On a town-by-town basis we studied 41 towns and found 3,588 businesses, with 570 of those businesses having earnings derived from tourism customers
- Importantly in this RTO 1/7 of business derives a substantial portion of its income from activities we would ascribe to being strongly related to or required by trail users on a trip

## Trail Tourists

- Data available for the report didn't differentiate between trail trippers as being internal or external to the region
- P2P Trail sales passes indicate that approximately 90% of trail users are from outside the RTO12
- Sarnia- Lambton Tourism indicates over 84% of its tourism is regional transfer tourism
- According to a study completed on the Georgian Trail on Collingwood, in Simcoe County, 36% of trail users come from within 20 minutes of the trail
- A majority (67%) of the 3.478 million visitors to RTO 12 come from the Greater Toronto Area and Simcoe County, regions with strong trail networks and comprehensive trail master plans

# Prepare for Success

- Trail Conditions
- Trail Design
- Tourism Integration
- Trail Planning
- Regional Trail Tourism Committee

# Trail Conditions

The larger report details amenities and necessities the trail tourist is looking for in a world class trail experience:

- Attractiveness of the trail as a tourism destination
- Wildlife viewing opportunities
- Tourism amenities/attractions within 2km
- Scenic beauty and vistas along trail
- Ease of public access
- Absence of motorized vehicles
- Parking on-site or close proximity (.5km)
- Interpretive signage
- Directional signage
- Contiguous to local tourism destination
- Part of a provincial trail network (ex. TCT)



# Trail Tourism Design Considerations

***Spatial Segregation*** - users are physically separated from sensitive and protected areas

Generally spatial segregation is useful for separating non-compatible recreational groups, including motorized and non-motorized users

***Spatial Containment*** - users are constrained to a specific area to minimize the impact

Spatial containment is the most widely used strategy in managing back country trails

# Trail Tourism Design Considerations

***Spatial Dispersal*** - users are spread throughout a site to minimize impact and crowding

Spatial dispersal is less effective than other strategies as spreading users over a larger area to prevent one area from being overused

***Spatial Configuration*** - user impact is minimized by the spatial arrangement of the facilities

5. Spatial configuration, while less effective in the back country, works well when providing visitor facilities. By locating amenities like lookouts, kiosks, washrooms and parking in a specific way considering the terrain, it is possible to direct the flow of traffic in areas that are more suitable for use.

# Tourism Integration

- Tourism staff are often unaware of trails in the area and therefore cannot successfully advise tourists or visitors to the area of them.
  - By educating staff in the tourism industry on trails they could have a real effect on the amount of users and people experiencing the trail
- Interactive kiosks at travel centers that display this information visually could also be a real asset in increasing the amount of users
- The OFSC is hugely successful at attracting visitors from around the province to the area in the winter months stimulating local economy
  - By providing long and connected 'destination trails' they have succeeded in being a real economic driver in the area
- There is potential for the same economic success around trails to be captured in the summer months with the creation of a spring-fall destination trail. The trail would have to be long and create a unique experience for a user to travel for just the trail itself

# Trail Planning - RTC

- Representative to trail interests within a set geographic area
- Managed a diverse set of issues in line with community interests at a regional level
- Communicated success and issues to the public, partners, local government and funders
- Networked with other Regional Trail Committees and equivalents
- Identify and assist in resolution and advocacy of operational trail issues locally, regionally, provincially and nationally

## Trail Planning – Regional Trail Tourism Committee

- An RTTC will allow the trail groups and Regional Trail Committees within RTO 12 to work together around tourism and marketing goals
- Works hand-in-hand with the RTO12 organization
- The RTTC would be the liaison between trail building organizations and the marketing arm of RTO 12
- Essential components to bridge the gap between both builders and marketers and help develop trails as market ready
- This committee would have a staff person who would work directly with the trail organizations and local businesses to develop a trails economy

# Summary

- RTO12 is a leader in comprehensive trails tourism development model
- Trail inventory is a place to work from – know all about what you've got!
- Create a Regional Trails Committee – manage uses not directly related to tourism, design, build, permits, legal, policy, conflict
- Create a Regional Trails Tourism Committee – amenities, hotels, tourism needs, outdoor products
- Further study needed: uses, patterns, traffic, gate, re-investment, grants, staffing, master plans

# Partners

**Sustainable Trails Ltd.** - a for-profit business that was Canada's first mechanized trail builder registered with the Professional Trailbuilders Association.

**Georgian Bay Coast Trail Inc.** - a not-for-profit organization whose mandate is to develop a rugged 200km hiking trail alongside the east coast of Georgian Bay from Bayfield Inlet to Point Grondine.

**Park to Park Trail Association** - a not-for-profit regional initiative that has created an east/west link through the Parry Sound/ Muskoka Districts and Haliburton County.

**The Ontario Trails Council** - a charity that promotes the development, preservation, management, and use of recreational trails in Ontario. They represent the interests of all those who use trails within the province of Ontario.