

Trails Inventory and Research in RT012

Condensed Report

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RT012 Research Committee

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Executive Summary

The goal of this project was to gain a better understanding and knowledge of the current state and future use of all recreation trail activity in Regional Tourism Organization 12. This report will discuss the development of trails in this RTO, outline the current status of trails in the region, and make recommendations for the direction that trail development should take in the future.

This information is to create a strategy to link businesses, tourism and trail managers to create a fantastic and safe trail experience for both local residents and visitors alike. To date, there hasn't been a comprehensive list of trails for this area, and while conducting the research, we found an additional 52 trails that weren't reflected in the current inventory found on the Ontario Trails Council's website (www.ontariotrails.on.ca). This type of study shows that there are probably more than the 88,000 kms of trail currently identified in Ontario.

The concept of a Regional Trail Tourism Committee would greatly aid the development of coordinated development of trails as a tourism product and provide sustainability to many of the volunteer and not-for-profit trail organizations found in RT012.

As the research found, the trails within RT012 have great potential to become a high class experience for all users. With some coordination on behalf businesses and trail organizations, this can be accomplished with some investment by the RTO.

The Project Scope

The main goal of this project is to obtain a better understanding and knowledge of the current state and future use of all recreation trail activity in RT012.

The Proponent: Regional Trail Organization 12

- ⤴ *RT012 is a newly created not-for-profit organization aimed at creating a unique brand and stellar experience for tourists visiting the Georgian Bay region.*
- ⤴ *RT012 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 RT012 is to have a better understanding of the potential of outdoor recreation in becoming a trademark for the development of tourism in the region.*

The Team

This report is collaboration between four organizations: Sustainable Trails Ltd., Georgian Bay Coast Trail Inc., Park to Park Trail Association, and the Ontario Trails Council. Together they have prepared the following document pertaining to trails within the RT012. A brief summary of each organization follows:

Sustainable Trails Ltd.

Sustainable Trails Ltd. is a for-profit business that was Canada's first mechanized trail builder registered with the Professional Trailbuilders Association. Sustainable Trails Ltd. plans, designs, constructs, and maintains: sustainable multi-use, hiking, mountain biking, equestrian, and ATV trail systems.

Georgian Bay Coast Trail Inc.

Georgian Bay Coast Trail (GBCT) is a not-for-profit organization whose mandate is to develop a rugged hiking trail alongside the east coast of Georgian Bay from Bayfield Inlet to Point Grondine as a vision of sustainable ecotourism within the Georgian Bay Biosphere Reserve.

Park to Park Trail Association

The Park-To-Park Trail is a not-for-profit regional initiative that has created an east-west link through the Parry Sound/Muskoka Districts and Haliburton County. Connecting Killbear Provincial Park to Algonquin Provincial Park, this 230 km trail is a destination for all trail enthusiasts.

Ontario Trails Council

The Ontario Trails Council (OTC) is a charity that promotes the development, preservation, management, and use of recreational trails in Ontario. Established in 1988, they began as a coalition of trail user groups including hikers, cyclists, snowmobilers and equestrians. They represent the interests of all those who use trails within the province of Ontario.

1. 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. This report will talk to the development of trails in RT012, the current status of the inventory of trails you have and make recommendation as to the trails you may want to consider developing into the future.

The great thing about trails is that they are low cost to implement and when properly built and maintained last for 25 years or more. In this way the trail does multiple duty - they are both a great domestic resource and great tourism opportunity - all on a per kilometer basis. In Ontario we have determined that there are on average 2.719 uses per kilometer, that is to say nearly three uses for each kilometer to trail we have.

In Ontario trails represent the largest recreational asset we have in real numbers of places and total length. In addition they also represent the lowest cost and the most accessible – most trails are open 24 hours a day, 7 days a week.

2. About Trails in RT012

There are many types of trails in the RTO and they tend to fall into characteristics such as scenic, historic, tourism, natural, motorized or non-motorized. In the region we have identified 194 trails.

2.1 Number of Trails

In the RT012, there are approximately 5,500 kilometers of trail and many trails in the area are multi-use. When calculating RT012's kilometers of trail per each user type, the number of kilometers combined equaled over 8,000. Fully 16% or one 7th of the land based inventory of trails and trail opportunities exist in RT012.

In general we can say:

- ⤴ Snowmobiling trails are usually stand-alone trails
- ⤴ Snowmobile trails are 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 trail.
- ⤴ 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 they are great 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.

These trails are used by 7 major uses. These are hiking/walking, cycling, snowshoeing, ATVing, snowmobiling, equestrian and cross country skiing. As in most other regions of Ontario non-motorized hiking or walking trails dominate the inventory landscape. These trails, while high in number do not produce the same per trail or per trip

economic impact as other motorized uses. This is not to say they are without impact, just that on a per trip expenditure hikers and walkers spent relatively less money per trip than a snowmobiler.

The major economic impact of non-motorized trails is related to local population and not tourism. OTC research shows a per trip return of approximately 10.00 per trip and a per km savings of .45 for every kilometer walked. As hikers and walkers travel relatively less distance than a horse, bike, ATV or snowmobile it is fair to say that it is the number of repeat trips that provide a significant aggregate economic impact from hiking and walking. For example a person taking a hike of 20 kilometers would return the constant of 10.00 + 9.00 to the health care system. Two trips of similar type would return 38.00.

In general, it is important to note that there is a rate of return per trip per user. An examination of trails in Halliburton County showed a rate of return per trip on a per kilometer basis as follows - Ranked by return per trip/per kilometer

- ▲ ATV \$1.22
 - ▲ Equestrian \$1.02
 - ▲ Running/Hiking/Walking \$0.357
 - ▲ Snowmobiling \$0.26
 - ▲ Cycling \$0.19
- * There is no reliable data for cross country skiing.

That this rate will fluctuate based upon the total number of trails, the greater the number of trails the lower per trip return as the kilometers increase. The trail tourist does spend an aggregate amount per trip regardless of trip length. In our analysis we have found: ranked by largest to smallest aggregate expenditure per trip-

- ▲ Snowmobiling - \$157.13
- ▲ Equestrian - \$92.82
- ▲ Running - \$78.50
- ▲ ATV - \$43.00
- ▲ Snowshoeing - \$39.05
- ▲ Cycling - \$22-25.00
- ▲ Hiking/Walking - \$10.30

The Ontario Trails Council has numbers on the total expenditure per person per trip while enjoying the recreational pursuit of:

- ▲ Motorcycle - \$122.00
- ▲ Canoe - \$46.00

One strategy to capturing a large tourism economy from non-motorized trails is to develop a method of tracking repeat trips and trip length. The distance to frequency will best assist the Region in determining the rate of return on the inventory. There are other important factors to note about non-motorized trails however,

- ▲ They are readily built,
- ▲ Lower relative cost to maintain,
- ▲ The life of a highly used non-motorized trail tends to be substantially longer than those of motorized use.
- ▲ Risk management assessment of trails that non-motorized, single use trails are relatively safer

Given the existing structure of trails in the Region it is clear that there is an existing strong non-motorized trail inventory. The larger number of trails means they are reaching more local places. This allows the region to capitalize on a broader number of communities achieving a trails tourism economy of some degree, as there is a trail in the area.

Therefore on a per kilometer basis it would be fair to say that the rate of return per kilometer of each of the trails in RT012 would be:

- ▲ 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
- ▲ *ATVing – 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

*there are permit programs that return revenue to operators and to trails but we do not have access to these revenue figures. We would assume that these if applied to trail trips would increase the rate of return – we discount these revenues though as they are not applicable across all use groups and therefore unfairly skew the revenue projection per km upwards.

In examining RT012 sub-regions of Almaguin, Muskoka, Algonquin and Parry Sound we find that Muskoka has roughly 50-75% more trail than any of the other three regions. In addition, it has nearly the same amount of trail tourism activity as the other region combined, based on where the trails are. If the RT012 was to examine a strategy of balance across the RTO as to a more equitable trail tourism economy these numbers may provide some guidance as to where to start.

We would contend that a diversified tourism strategy attracts more of each

type and then the total tourism GDP is increased as opposed to one suffering from the other. In fact this seems to be the Muskoka experience.

In an effort to assist the RT012 to understand the relationship between trails, trail location, business and trail business we tabulated data based on trail location. This identified the town nearby the trail. A study of the town allowed use to gauge the overall level of economic activity in that particular 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.

Interestingly, given the geographic distance between major towns within the region there is the possibility that there is a substantial amount of internal RT012 tourism but we did not have the ability to differentiate between trail trippers as being internal or external to the region.

2.2 Gaps in Trail Data in RT012

2.2.1 Making an Assessment - What Works in Trails - Management and Tourism

A primary data gap that has been identified is the lack of a recent economic impact study for trails in the region. A report by Arthur Anderson in 1999 that showed the Park-to-Park Trail would have an annual economic impact of \$700,000 to \$1.4 million of spin-off spending. There have been no studies since the opening of the trail to see if these figures are accurate.

The lack of data about trails is not limited to their regional economic impact. On a Provincial (and RTO) level there is a lack of meaningful data about trails and their benefits (economic, health, cultural). Further, developing an understanding through proven or tried business models. It was difficult to gather impact data from tried pilot or ongoing business operations related to trails.

Certainly local marketing and local product development assist local business to have support from regional connections. Businesses operating on a regional level benefit from the regional strategy and the businesses attracting a provincial level consumer benefit from provincial level marketing. The Ontario programs and their outreach to foreign tourism markets help to encourage a broader tourist market and sustain all efforts locally and regionally.

Currently, a majority (67%) of the 3.478 million visitors to the RTO come from the Greater Toronto Area and Simcoe County, regions with strong trail networks and comprehensive trail master plans. These visitors and future residents are accustomed to a degree of trail access which is not currently the standard within the RTO.

According to a study completed on the Georgian Trail on Collingwood, in Simcoe County, that 36% of trail users come from within 20 minutes of the trail. While there are some communities that are within 20 minutes of a destination trail equal to the Georgian Trail, a 32km rail trail that permits walkers, joggers, cyclists, cross-country skiers and snowshoers at its 30 access points.

A lot of work has been done by various marketing organizations to capture trail tourism potential. The Atlantic Trail Coalition has been working with the 4 Atlantic provinces to determine market ready criteria for tourism products and trails.

Market Ready Criteria (as identified by the Dept. of Tourism and Parks, New Brunswick)

- ▲ 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
- ▲ Development potential as a local tourism destination and part of a provincial network

Trail Towns: Capturing Trail-Town Tourism is a guide administered by the Pennsylvania Regional Trail Corporation to help bring their project's success to other locations around the world. This guide is not designed to help a community build a trail, but rather to enhance a community that already has a trail in or near it. It is a model that can be adapted and applied to the RT012 and help to further achieve their economic goals for the area.

2.2.2. Managing Trails for Success

Regional trail planning is essential component to make the most of the trail networks that do exist within the RTO, but also ensuring that trails are a major component of any future development in the region. With the trend of baby-boomers retiring to their

seasonal residences in the RTO, there is a growing market for both stay-cations, vacationing within the RTO and visiting family and friends who will be looking for activity surrounding the homes being built and converted for retirees. With this captive audience of local tourists, developing a comprehensive trail plan that encourages tourism from those living within the RTO can provide a backbone to future economic development.

2.2.3 Current State of Regional Management Level Trails in RT012

The following are six regional trail entities within the RT012 region that manage, build, and/or advocate trails. All six are strong trail organizations within the area that currently provide their communities with recreation and tourism opportunities.

TRANS CANADA TRAIL

Within RT012, there are nine different trails operated by different organizations that are part of the Trans Canada Trail system. Here are the trails that comprise of 111 km of Trans Canada Trail in the RT012. The region also hosts two pavilions of the eighty-seven found across Canada in Magnetawan and Bracebridge that recognize those that have donated to the trail.

B. PARK TO PARK TRAIL

The Park-To-Park Trail is a not-for-profit regional initiative to create an east-west link through Parry Sound/Muskoka Districts and Halliburton County. Connecting Killbear Provincial Park to Algonquin Provincial Park, this 230 km length of trail is a destination for all trail enthusiasts. The trail is a multi-use trail system that links seven of the province's premiere provincial parks, as well as area attractions, services, amenities and other trail networks such as the Trans Canada Trail.

C. MUSKOKA TRAILS COUNCIL

Muskoka's trails system dates back to the early 1990s, when Bracebridge family physician David Kent began a campaign to improve the daily physical activity opportunities for local citizens. The Muskoka Trails Council became an incorporated Not-For-Profit body in 2007, and in 2009 received federal charitable status. Their Mission is to advance public health. They do not own or manage trails but are rather an advocate for trails in Muskoka.

D. DISCOVERY ROUTES

Discovery Routes Trails Organization was established in 1992. As a not-for-profit organization as well as a registered charity, Discovery Routes' main responsibilities are to create, maintain, and promote multi-seasonal trails in the Near North region of Ontario. Discovery Routes is a volunteer partnership of community leaders, economic developers,

environmental stewards and locally-based action groups whose main goal is to provide the coordination for community based partnerships.

E. ONTARIO FEDERATION OF SNOWMOBILES

The Ontario Federation of Snowmobile Clubs is dedicated to providing strong leadership and support to member clubs and volunteers, to establishing and maintaining quality snowmobile trails, which are used in a safe and environmentally responsible manner, and to furthering the enjoyment of organized snowmobiling. Four OFSC districts fall/partly fall within the RT012 region and comprise of approximately 5,000 kilometers of trail bringing a lot of economic stimulus in the winter months. They are Parry Sound Snowmobile District (10), Near North Trail Association (11), Muskoka (7) and Snow Country (6).

F. ONTARIO PROVINCIAL PARKS

Within RT012 there are ten Provincial Parks, many of these parks maintain extensive networks of trails within their borders, although it is not the primary function of the parks.

2.3 Management Models

The main techniques that can be used to manage trails to ensure that neither user experience nor the environment suffer from death by a thousand feet, or wheels are to manage the number of users or to manage how the use the site through physical design. The oldest access management technique, dating back to the 1970s, was use limits. These limits can take the form of restrictions on the actions of individuals who are using the resource (group size, the length of a stay, or the means of transport while on the site) or overall limits on the total number of people allowed to use the sensitive area during a set period by means of entry and use permits.

If demand for permits exceeds the number of people permitted, rationing systems must be used, which can favor certain user groups (affluent, younger and flexible travelers). New technology has come available that allow for low-cost, portable measuring devices to be installed at trailheads that are able to count the number of users who cross the beam and calculate what means of travel they are using, walking, cycling, ATVing etc.

2.3.1 Spatial Management Strategies

While permits can be used to limit or monitor the number of users to a space, the physical layout of a trail and its trailhead amenities can be used to direct users to routes and areas that are preferred by management. There are four techniques described by

Leung and Marion that can be used on their own or in combination with others:

1. 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. It is not a widely used strategy because it requires more space. However, it can be a useful technique in areas where users expect solitude or conflicts between motorized and non-motorized users occur frequently.

2. 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, and was generally well received because the carefully selected and managed trails prevent users from creating their own trails.

3. 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, allows all the areas to become used to a lesser degree. Also, when considering motorized vehicles, this technique can encourage the creation of additional side trails which can increase environmental damage off the trail.

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

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.

Generally, these spatial management programs work best when used in combination with each other and can be used to complement each other, creating a well-designed, easy to maintain trail tourism experience. A short list includes:

Leave No Trace is a non-profit that teaches how to use outdoor spaces and leave a minimal impact. Often times this takes the form of signage at trailheads and along trails. It also utilizes an array of direct user targeted materials that speak of environmentally safe practice to the targeted user group in language that use group understands.

Zoning: Use zoning and regulations are another trail management technique. These are often put in place by the land owners, including Crown and Municipal Land. In this case

certain user types may not be permitted on the trail or access may be limited during certain times of the year.

Barriers: A technique that is used on many trails, physical barriers including gates and blocks. These tools can be effective in providing physical reminders of permitted users, however, many users will ignore or remove such barriers in an effort to access the trail.

Peer to Peer Programs: In the other user groups and managers in the Trails Community, there is a healthy debate about trail enforcement. There are pros to having trail patrol programs in place. They provide assistance to trail users if there is an emergency, can act as trail ambassadors providing information and act as deterrents displacing illegal activities. The warden/enforcement programs are expensive to operate and there are fewer trail volunteers outside of motorized use.

Events and permits are used by some management authorities to control use, while sustaining a revenue stream, often dedicated to the maintenance of the trail product and the provision of services and supports detailed in this section.

Enforcement is an important consideration when planning trails. It is also brought up as an issue by people who are not in favour of trails. In our experience, good trail design, signage and education is the path for reducing conflict on trails and between users.

Universal Design and Access standards are applied generally across all trails by many trail management organizations. These include a range of policies and procedures that promote access, which is a draw for any tourism product, and safe use – ensures ongoing ridership.

Design Build Considerations are necessary to the provision of any tourism product, whether a min-putt, movie theatre, water park or amusement rides all of these other more common traditional amusement and tourism products have standards, guidelines and engineered safety protocols. Tourism trails, should be held to an equally high, or higher standard of basic product engineering.

Trail safety and emergency response services are separate issues from enforcement although they tend to be lumped together. There are many fantastic examples of trails being signed to provide users and emergency personal accurate locational information.

2.4 Trailheads

Most of the trails in RT012 have some sort of Trailhead signage. Trail groups have been developing the signage adhoc as trails are developed. Discovery Routes has recently created some themed signage for their trail systems. All the other trailheads found in RT012 could benefit from this type of branding program.

Trailhead Amenities generally include trails that have trailhead signage and amenities at their access points. There are specific amenities and information that trail users expect to find at trailheads and others that enhance their trail experience. Parking and trailhead signage is the top 2 amenities that trail users expect to find at a trail access point. Washrooms are also greatly appreciated but are usually considered a luxury.

Trailhead Signage should include some basic information on it to serve trail users. This includes: a map of the trail, emergency contact information, allowed uses, access points, trail features, accessibility/ difficulty and whether the trail is pet friendly.

3.0 Product Development Success

3.1 Regional Trail Committees

The Ontario Trails Council and Trans Canada Trail Ontario have spent the past five years promoting the concept of Regional Trail Committees. What they found working with trail organizations that appeared to be commonalities that lead to their sustainability:

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

This has become a sustainability model for trail groups by being involved with this regional model.

3.2 Regional Trail Tourism Committee

To solve the issue of a RTO wide trails coordinating committee, the concept of a Regional Trail Tourism Committee will allow the trail groups and Regional Trail Committees within RTO 12 to work together around tourism and marketing goals. This of course would work hand-in-hand with the RT012 organization. The Regional Trail Tourism Committee would be the liaison between trail building organizations and the marketing

arm of RTO 12.

This committee would require a few essential components to bridge the gap between both builders and marketers and help develop trails as market ready. Trail builders are not marketers and vice versa. This committee would have a staff person who would work directly with the trail organizations and local businesses to develop a trails economy like they have with the Trail Town Model along the Upper Allegheny Passage Trail in Pennsylvania.

3.2.1 Regional Trail Tourism Committees increase development capacity

In order to double tourism receipts by 2020, as is the mandate of RTO 12, it is nearly impossible to do without partnerships. Only by coordinating the efforts of destinations, like trails, and the businesses that surround them can we truly maximize the economic impact of tourists. The proposition of using recreational trails as a driver of tourism is not unique to the RTO 12, it is a model that has been tried in many locations and they provide us with useful insights into the most valuable partnerships and techniques that have been tried to date.

The Management structure of an RTTC, would be adaptive to the *Trail Towns Tourism Program*. The *Trail Towns* model provides a tried and true system to providing increased tourism revenues, the trail towns of the GAP are standing proof of these benefits. Many of the suggestions made by the *Trail Towns* guide are those already practiced by the communities in the RTO. However, by refocusing these efforts on the trail network and trail users, these efforts can bring in a greater result.

Basic elements of a Trail Town strategy include:

- ⤴ Enticing trail users to get off the trail and into your town
- ⤴ Welcoming trail users to your town by making information about the community readily available at the trail
- ⤴ Making a strong and safe connection between your town and the trail
- ⤴ Educating local businesses on the economic benefits of meeting trail tourists' needs
- ⤴ Recruiting new businesses or expanding existing ones to fill gaps in the goods or services that trail users need
- ⤴ Promoting the "trail-friendly" character of the town
- ⤴ Working with neighboring communities to promote the entire trail corridor as a tourist destination

The proposed Regional Trails Tourism Committee could be the ideal organization to oversee the assessment of the towns and the trails to see if this type of strategy would work

for the region. By determining the market readiness of the trails and towns of the region it is possible to determine which sorts of relationships are the most important to develop for the different communities in the RTO.

Within RTO 12 there are already examples of businesses that have positioned themselves to benefit from trail-based economic development. In the Parry Sound area, both the Quality Inn and the Parry Sound KOA have their accommodations located on the Seguin Trail, which serves as a major thoroughfare for snowmobiles in the winter and ATVs in the summer.

Partnerships between trails and other groups, such as charities and non-profits can have a spin-off benefit for local businesses. By allowing and encouraging non-profits to use local trails as an outdoor community centre, individuals who are interested in a specific activity may be drawn to the region for the first time, and decide to return to the area in future to explore more of the trail or simply to visit the town that held the event.

In addition to positioning local businesses to benefit from existing trail based tourism, RTO 12 could position itself on the leading edge of a growing market, trails for disabled individual. By developing and marketing both trails and accommodations that are accessible to individuals with a range of disabilities.

Additionally, developing a series of trails that could serve for hand cyclists as well as mountain bikers and hikers could make the region an international destination. Currently there are only three hand cycling racing courses in North America, a fourth is being built in Calgary later this year.

The opportunities for successful partnerships between local businesses and trail organizations virtually limitless, as trails provide an excellent draw for visitors from across the RTO, province and country and by ensuring that businesses are prepared to cater to these markets help the region reach its goal of doubling tourism receipts by 2020.

4.0 Recommendations:

After collecting an inventory of trails in the RT012, analyzing the data, and applying the information to our region there were weak areas and ignored needs that were obvious. While these weaknesses and needs are evident they could be remedied with the implementation of a Regional Trails Tourism Council (RTTC). The following are needs that could be addressed and fulfilled by an RT012 RTTC and are split into two categories:

4.1 Marketing

While there are several larger trail groups within the RT012 (as discussed previously – TCT, P2P, MTC, Provincial Parks, DR) there is a definite lack of ability to work together and share information. In regards to marketing, an RTTC could:

⤴ *Create a trails master plan for the RT012.*

A Trails Master Plan is a strategic document that provides a direction and a vision for trails in the area going forward. From here direction can be given on data collection, marketing, branding, etc.

⤴ *Develop a framework or a model for collecting user data in the area.*

The Bruce Trail uses a number of methods to collect information on users including surveys and trail counters. Each trail group could use this model in their own area and capture consistent and valuable data on users that could be used to tailor their marketing strategy.

⤴ *Create consistent signage and branding for RT012 trails.*

Provincial Park signage is similar in color, feel, and size regardless of the park it is in which makes for a consistent, familiar feeling or when the user visits them. It also brings a certain expectation. The identity of RT012 trails is inconsistent and no real branding has been considered RT012 wide. Branding and marketing the trails in RT012 a certain way is needed for the area to create a familiar, consistent feeling for the user.

⤴ *Market accessibility.*

Accessibility in Ontario is a topic that has been discussed a lot recently and affects many people and families. Often, people with disabilities can be discouraged by trails as they are often viewed as inaccessible. There are trails within the RT012 that are fully accessible and by marketing them as such there could be an increase in users.

⤴ *More training for tourism staff*

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 the benefits of trails, where they are located, how long they are, etc. 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.

⤴ *Difficult to market and attract visitors for small trails.*

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. Such a trail would be an indispensable asset to the area and the local economy.

4.2 Trailhead and Trail Locations

There is no information in one place on Trailhead and Trail locations within the RT012. The OTC website has maps that show trailheads on them, but these do not provide the user with a GPS coordinate or a trail map that details the route. In regards to trailhead and trail locations, a RTTC could:

- ⤴ Recommend to the Ministry of Tourism and Culture that the OTC be given funding to enable them to reorganize website under the RTO regions – this way the RTOs are branded and organized in one place all together
- ⤴ From here, since the OTC has all the GPS information for trailheads within the RT012, they could present it in a more effective manner on their website by providing the actual coordinates (a link on the RT012 trail's page could link to the OTC webpage providing this information)
- ⤴ Trail businesses/not-for-profits/groups would be encouraged to verify their information on the OTC website to ensure accuracy
- ⤴ There exists a real gap in what exists and the information provided on water trails – coordinate where more information and mapping needs to be done
- ⤴ There is no line data for most trails – coordinate to hire summer students to collect line data on trails within the RT012 and give to the OTC to present on their website

These recommendations are far too varied and large in scope to be dealt with on an individual trail group level. With experts sitting on the board and employed, the RTTC could tackle each of these recommendations and apply them to the RT012 area making trails a real asset and economic driver in the region.

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