



City of Montreal, QC

## SECTION: 4

# A GUIDE TO EVALUATING TRAILS TOURISM READINESS

## Purpose:

- Identify priorities to grow trail tourism.
- Support tourism investment attraction.
- Enable the communication and marketing of the trail to appropriate visitors.

## Target audience:



### Trail operators, designers, builders

- Destination Management Organizations
- Economic Development Officers
- Tour Operators & Service Providers
- Trail Operators

Trails that are well developed, managed and strategically marketed can become important economic drivers for host communities, and valuable destinations that help to diversify and grow Canada's tourism economy. Tourism relates to the activities of people travelling to and staying in places outside their usual environment for leisure, business or other purposes for not more than one consecutive year. Trail tourism is tourism that is primarily motivated by a visitor's desire to experience a trail and/or trail destination.

Maximizing the benefits of trail tourism requires destinations to provide a high-quality and dependable trail tourism experience, complete with the appropriate trail conditions, as well as the amenities and services that visitors expect. And visitors, as well as tourism operators, expect that this experience will be provided each and every time they visit the trail. This responsibility goes well beyond the trail operator. It is the responsibility of the destination's entire trail tourism ecosystem (Figure 6).

The destinations that are most successful at maximizing the benefits of trail tourism recognize that it is about much more than the physical trail itself. Of importance for trail tourism destinations are the interconnectedness and interdependency of the tourism ecosystem, the important role each entity in the system plays, and the deliberate work to coordinate, align and collaborate with the players across the entire ecosystem.

The trail tourism ecosystem can be thought of as a complex, interwoven and dynamic network of entities, each of which have their own mandates, but that purposefully come together to support and deliver trail tourism. Each entity in the ecosystem plays an important role in providing the visitor's trail tourism experience. In the most general sense, the trail tourism ecosystem includes:

- trail operators who plan, build and maintain the trail
- land managers who manage the land the trail is on and provide authority for the development of the trail
- accommodations where visitors stay before they start on the trail, while they are on trail and when they complete the trail
- food and beverage providers
- attractions on or near the trail that elevate and enrich the visitor experience
- tour operators who sell tours and guide visitors on the trail
- transportation providers who help visitors get to, from and even along the trail
- local, regional, provincial/territorial and national Destination Management Organizations that help to market the trail, promote visitation, and lead the development and management of the destination



Figure 6 Canada's Trail Tourism Ecosystem



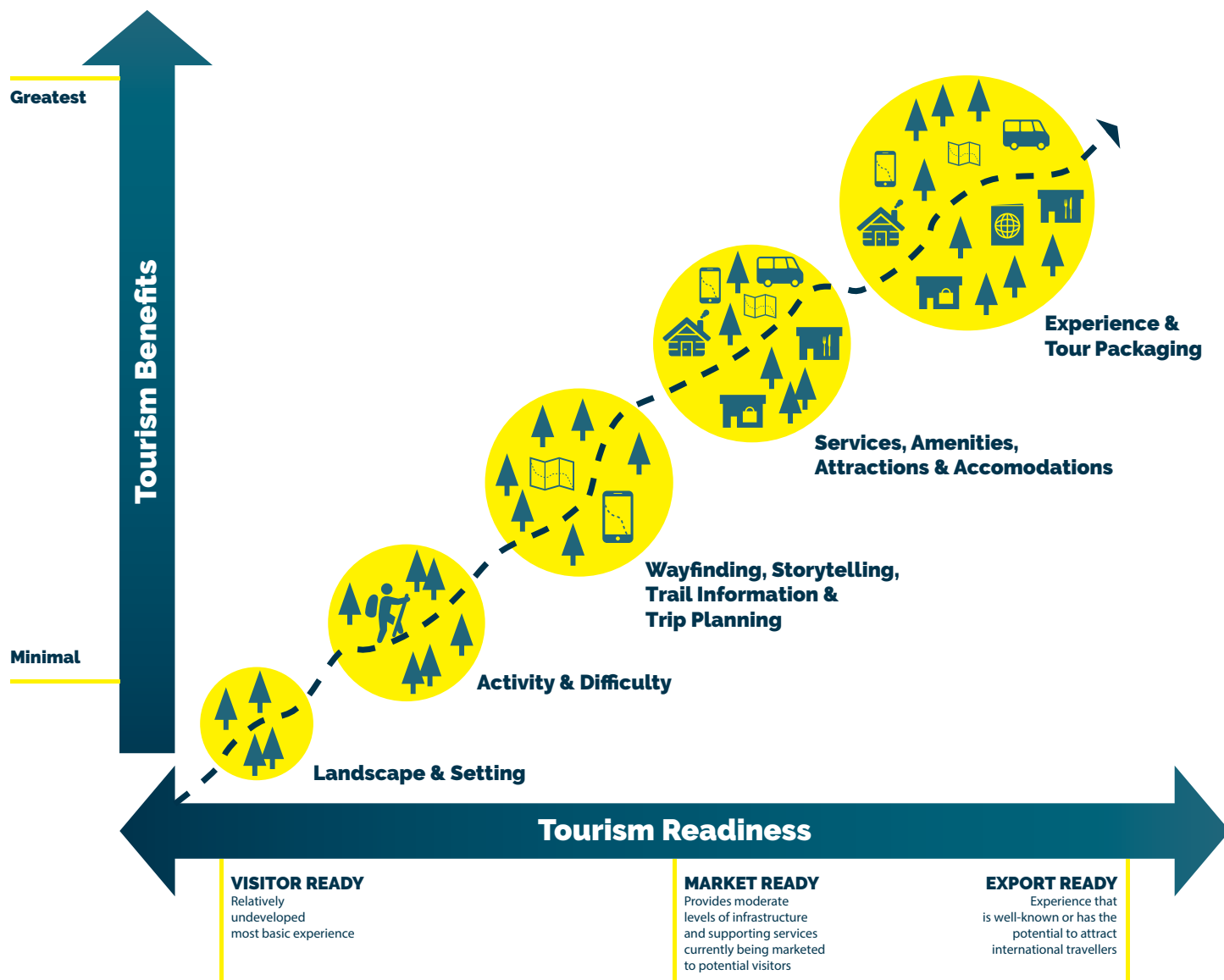


Figure 7 Trail Tourism Benefits & Readiness Spectrum (Justin Ellis, 2016)

## What is Tourism?

Tourism relates to the activities of people travelling to and staying in places outside their usual environment for leisure, business or other purposes for not more than one consecutive year.

## What is Trail Tourism?

Tourism that is primarily motivated by a visitor's desire to experience a trail and/or trail destination.

## Who is a Tourist?

A tourist is anyone who stays one or more nights away from home or, if no nights are spent away from home, travels at least 40 km one way from home to the destination.

The reliability and confidence that a destination's trail tourism ecosystem can ensure a quality and consistent experience is known as "tourism readiness". Tourism readiness is the rating of how "ready" a trail is to welcome visitors, to be promoted as a travel-motivating tourism attraction and to ensure a positive experience.

Tourism readiness criteria are commonplace in nearly all provinces and territories across the country. However, the existing tourism readiness criteria have not been tailored to be relevant to trail tourism. Recognizing this, this guide:

- creates a common lexicon and approach for discussing and identifying the tourism readiness of trails across the country
- enables destinations to better understand the tourism readiness status of their trail(s) and identify future priorities to enhance its tourism readiness
- supports the creation of plans/strategies/proposals to attract trail tourism investment
- inspires excellence in trail tourism experiences across the country

Through this guide, TCT aims to establish a consistent national approach to evaluating the tourism readiness of trails in Canada. This guide provides a self-assessment tool that trail operators, destination managers or others within a local trail tourism ecosystem, can apply to their respective trails. The outputs of the assessment will assist in increasing the understanding of current trail tourism readiness and help identify ways to advance trail tourism potential.

## 4.1 TRAIL TOURISM READINESS CATEGORIES

Trails can be categorized into one of three levels of tourism readiness: 1) Visitor Ready, 2) Market Ready, 3) Export or Travel Trade Ready. These categories are generally defined as follows:

**Visitor Ready** — Refers to a legally operated trail that is ready to support local visitors. These trails provide a relatively undeveloped trail experience, are likely known primarily by locals and potentially short-haul domestic travellers, and are typically not actively promoted beyond local markets.

**Market Ready** — Refers to a trail that meets the *visitor ready* criteria, and also provides a refined trail experience and visitor amenities. These trails have a brand, are known regionally and provincially/territorially, and are actively marketed to potential visitors in domestic short and long-haul markets.

**Export Ready** — Meeting the criteria for both *visitor* and *market ready*, these trails are the best of what Canada has to offer and are well positioned amongst the best trail destinations in the world. They contain a critical mass of on- and off-trail activities that can provide multi-day experiences. As primary travel motivators, these trails provide a refined and fully-integrated experience. They offer exceptional quality infrastructure and amenities, dependable support services and excellent trip planning information. Access to knowledgeable staff (e.g., trail operator, Destination Marketing Organization) and trip planning tools are in place, ready to meet the needs and expectations of the more experienced trail tourist. The tourism industry in the region acts as an ambassador for the trail and is highly knowledgeable about the available trail experiences. The trail is regularly maintained and visitation is actively managed. This ensures the desired trail experience can be achieved and undesirable impacts to the host community are mitigated or avoided.

Tourism readiness should be thought of as a spectrum (Figure 8). Although there are three general categories, the lines between each are, in fact, blurred. The process of determining a trail's or a trail network's tourism readiness is structured through the evaluation of transparent criteria, but still remains a professional opinion. As such, TCT recommends that the process of determining tourism readiness should be undertaken by a panel of individuals who represent multiple interests within the local trail tourism ecosystem. Such a process with allow for structured discussion, debate and ultimately greater buy-in to the end result.

### Trail Tourism Readiness

Tourism readiness is the rating of how “ready” a trail is to welcome visitors and serve as a travel motivating tourism attraction. The higher the tourism readiness rating, the higher the quality and consistency of the trail experience and the appeal the trail will have with longer-haul markets or even international markets.





Figure 8 Trail Tourism Readiness Continuum



Goat Creek Trail, AB  
Parks Canada



## 4.2 TRAIL TOURISM READINESS CRITERIA & ASSESSMENT

Trail operators and host communities are often excited about their trail's potential for trail tourism. This passion and excitement are fundamental to a successful trail tourism destination. But there are many other elements that must be considered and addressed before a trail and a trail tourism destination begin to be marketed.

Like other tourism products, criteria can be used to determine the tourism readiness of a trail. We have looked closely at the tourism-readiness criteria applied in other segments of the tourism industry, as well as at the criteria developed and applied in other leading trail tourism destinations around the world. We engaged trail and tourism industry leaders across Canada to help inform and identify the criteria that should be used to evaluate and rate the tourism readiness of the TCT and other trails across the country. These criteria provide a clear indication of how ready a trail and its trail tourism ecosystem are to create and support a successful trail tourism destination.

In general, the trail tourism readiness criteria are grouped as follows:

- approvals, planning, management and maintenance
- uniqueness of the trail
- branding, marketing and promotions
- visitor amenities and services
- staffing and funding

The criteria used to evaluate and rate tourism readiness are outlined below. Some criteria play a more significant role in determining tourism readiness than others, and, as such, some criteria serve as "minimum filters" that must be met before a higher tourism readiness rating can be considered. If the trail does not meet a "must" criterion, the trail cannot be rated at the tourism readiness category in which that criterion is presented.




























The following pages provide a graphic representation of the criteria and how responses align with the tourism readiness categories. Please see [Appendix E](#), for a more detailed Trail Tourism Readiness Evaluation Tool that can be completed to help understand a trail's tourism readiness.



Ville de Chambly, QC



## Approvals, Planning, Management &amp; Maintenance

Criteria			
	VISITOR READY	MARKET READY	EXPORT READY
The trail has been formally approved by the land manager/landowner.	 Yes  No	 Must  Desirable  N/A	 Must  Desirable  N/A
A trail operator (e.g., volunteer group, government agency) has formally accepted responsibility for the management of the trail.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
An approved management/master plan is guiding the development and management of the trail and pursuit of tourism.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
A visitor management plan is in place to guide the management of visitors on the trail.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
The basic trail classification, permitted uses and rules of use of the trail are clearly communicated to visitors.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
Quality and appropriately-located wayfinding, regulatory, safety/warning, and responsible use signage is installed along the trail.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
Trail conditions are formally inspected and documented...	 Weekly  Monthly  Quarterly  Annually  No set sched	 Weekly  Monthly  Quarterly  Annually  No set sched	 Weekly  Monthly  Quarterly  Annually  No set sched
Regular maintenance occurs on the trail...	 Weekly  Monthly  Quarterly  Annually  No set sched	 Weekly  Monthly  Quarterly  Annually  No set sched	 Weekly  Monthly  Quarterly  Annually  No set sched
When serious maintenance problems that create visitor safety or environmental/cultural risks are identified, the trail operator has the capacity to address them...	 Immediately  Minor delays  Extended delays	 Immediately  Minor delays  Extended delays	 Immediately  Minor delays  Extended delays
A long-term, sustainable funding model is in place to support capital asset replacement and renewal.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A

Criteria				
Uniqueness	The trail travels through and/or provides visitors with an experience that is unique...	 ...Internationally...  ...Nationally...  ...Prov/Terr...  ...Regionally...  ...Locally...	 ...Internationally...  ...Nationally...  ...Prov/Terr...  ...Regionally...  ...Locally...	 ...Internationally...  ...Nationally...  ...Prov/Terr...  ...Regionally...  ...Locally...
	On its own, or when combined with other connected trails, the trail can support...	 Extended trips  Multi-night trips  Overnight trips  Day trips	 Extended trips  Multi-night trips  Overnight trips  Day trips	 Extended trips  Multi-night trips  Overnight trips  Day trips
	A distinct and unique trail brand has been developed and incorporated into trail amenities and signage on the trail and in marketing materials.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
	A user-friendly website has been developed to support trip planning, provide visitor information and showcase marketing initiatives.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
	A visitor-focused mobile device application (including off-line capabilities where relevant) has been developed to support and enhance the visitor experience.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
Branding & Marketing	The trail is being deliberately marketed to target markets at all stages of Destination Canada's "Pathway to Purchase".	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
	The trail is currently being marketed by...	 Destination CA  Prov/Terr DMO  Regional DMO  Local DMO  No DMO	 Destination CA  Prov/Terr DMO  Regional DMO  Local DMO  No DMO	 Destination CA  Prov/Terr DMO  Regional DMO  Local DMO  No DMO
	A library of compelling and high-resolution photos and video footage of the trail has been developed.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
	DMOs attract, or are working to attract, and host international media and travel trade familiarization tours.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
	The trail is integrated into visitor experience packages and sold through travel trade.	 Must  Desirable  N/A	 Must  Desirable  N/A	 Must  Desirable  N/A
Visitor Amenities & Services	The quality of comfort and convenience amenities provided for visitors along the trail are...	 High-end  Mid-range  Basic  None offered	 High-end  Mid-range  Basic  None offered	 High-end  Mid-range  Basic  None offered

## Visitor Amenities &amp; Services

Criteria			
	VISITOR READY	MARKET READY	EXPORT READY
Visitors have access to market or export-ready accommodation on or near the trail. <i>(if trail supports overnight use)</i>	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Accommodations are appropriately distributed along the trail to service visitors on each night of their journey. <i>(if trail supports overnight)</i>	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Visitors to the trail have access to a clustering of market or export-ready attractions on or near the trail.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Communities on or near the trail have developed signage and visitor information strategies to attract trail visitors to their communities.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Communities on or near the trail have developed a welcoming and inviting atmosphere for trail visitors (e.g., welcome signage, beautification, themed banners).	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
The trail is animated through events/festivals/competitions that attract visitors to the trail from beyond the local community.	Annually Periodically Never	Annually Periodically Never	Annually Periodically Never
The trail can be accessed by dependable and bookable public or private sector transportation providers.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Trail operator maintains staff (or other similar arrangement), including trained customer service personnel who can respond to enquiries about the trail.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
When an enquiry about the trail is received, a response can be provided within...	24 hours One week >One week If/as we can	24 hours One week >One week If/as we can	24 hours One week >One week If/as we can
Formal training and information about the trail is provided to front line staff and businesses in the tourism industry to help them be ambassadors for the trail.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Local tourism businesses are knowledgeable about the trail, and are active ambassadors.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A
Locally elected officials actively reference the trail as both an important quality of life and economic asset in the community/region.	Must Desirable N/A	Must Desirable N/A	Must Desirable N/A

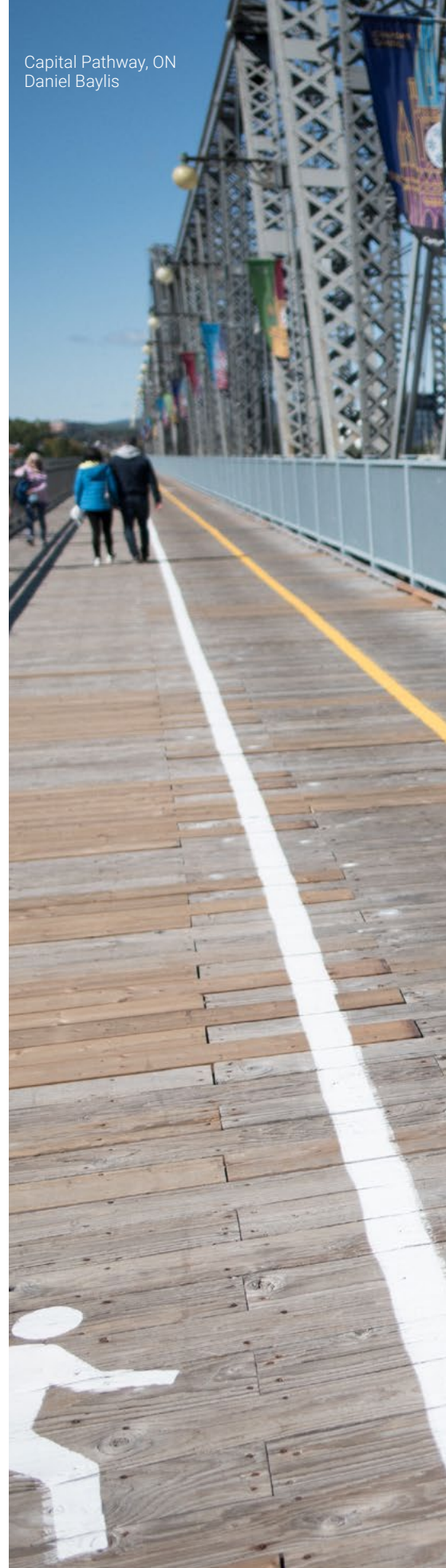


## 4.3 TRAIL TOURISM READINESS ASSESSMENT: INSIGHTS TO ADVANCE A TRAIL TOURISM STRATEGY

Undertaking the trail tourism readiness assessment provides the essential insights needed to advance the success of a destination's trail tourism sector. Learnings from the trail tourism readiness assessment allow trail destination leaders to understand the strengths of the destination as well as areas that require further work in order to ensure the trail, or trail network, is ready to attract target markets and consistently satisfy the expectations of target visitors.

The most successful trail destinations ensure strong coordination across the entire trail tourism ecosystem. To do so, we encourage destinations to work collaboratively with all trail tourism players to utilize the findings of the trail tourism readiness assessment to inform the development of a trail tourism strategy. Once complete, such a strategy will help ensure that all elements of the trail tourism ecosystem support the future vision for the trail/trail network and are focused on advancing shared priorities that put the needs of both visitors and host communities at the forefront.

Capital Pathway, ON  
Daniel Baylis





### 4.3.1 Trail Tourism Readiness & Marketing the Trail as a Destination

Marketing can rapidly grow visitation to a trail or trail network. When a destination is market-ready, this marketing will help to maximize the benefits that come from trail tourism while minimizing any negative impacts. However, when a trail destination is not ready for visitors, marketing can create serious problems for trail operators, residents, the environment and the destination brand. Before beginning to market a trail or trail network, destination marketers should ask themselves:

- Is the trail and the host destination ready to accept greater numbers of visitors?
- What target market segments and market origins are most likely to have a positive trail experience given the current condition of the trail and the trail tourism ecosystem?
- Does the planned marketing messaging, also known as the brand promise, match the visitor experience that the trail and trail tourism ecosystem currently provide?

Maintaining the brand promise and ensuring ongoing community support for trail tourism is the number one priority when making decisions about marketing trails. It is imperative that the trail destination be able to deliver the experience that is being “sold” to visitors, and that it can be done in a way that avoids host community complaints and concerns. Overstating the quality of the trail and/or trail experience will lead to unmet visitor expectations. Unmet visitor expectations can lead to visitor complaints and considerable risk to the trail’s brand and the broader reputation of the destination, and can pose a risk to tourism businesses and local support for trail tourism.

Recognizing these concerns, TCT encourages anyone who is working to market a trail or trail network to undertake the trail tourism market readiness assessment and use the results to determine which target market origins are most appropriate for marketing the trail to. Figure 9 illustrates the target market appropriateness based on the trail’s tourism readiness rating.

If My Trail Tourism Readiness Rating is...



**Not Visitor Ready**

...the trail should NOT be marketed...

**or actively promoted until the trail is visitor ready.**



**Visitor Ready**

...the trail can be marketed to...

**hyper-local and/or short-haul markets.**



**Market Ready**

...the trail can be marketed to...

**mid-haul domestic and/or long-haul domestic markets.**



**Export Ready**

...the trail can be marketed to...

**long-haul international markets.**



Figure 9 Tourism Readiness Rating & Marketing