2024

North American Trail Sector Survey Results

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Introduction

In February 2024, Trans Canada Trail partnered with American Trails to launch the first North American trail sector survey to gain deeper insight into the sector and its needs. The survey aimed to capture the current state of the trail sector across Canada and the United States; results will be used to inform new resources and funding opportunities that better support trails.

Scope

The survey was directed to people who work and volunteer in the trail sector in Canada and the United States, and included respondents from not-for-profit trail groups, Indigenous communities, and municipal, county, district, state, provincial, territorial, and federal departments responsible for trails. This survey covered:

- Accessibility and inclusion
- Nature and climate
- Demographics
- Organizational capacity
- Projects and investment
- Staffing and volunteers
- Tourism
- Trail maintenance

Distribution and responses

The survey was distributed online via email to partner groups and shared on other digital channels (social media and newsletter) by both Trans Canada Trail and American Trails. The survey period started February 2, 2024, and ended April 5, 2024.

A total of 538 responses were collected:
- 191 were from Canadian organizations
- 347 were from American organizations

Notes

In some cases, total percentages exceed 100% because respondents could select more than one answer to accurately reflect their situation.

Respondents also had the ability to leave written notes at the end of the survey. During the survey period, an additional response option ("not applicable to me") was added to most questions because American respondents felt the existing options did not reflect American structure, processes or geographies well (e.g.: district instead of municipality), which was communicated by respondents in the end-of-survey text field.

The following sections provide a summary of responses, organized by respondent country.

Canadian results

Respondent demographics

Location

The survey included respondents from every province and two territories (Yukon and Northwest Territories).

Languages spoken

- 89% English
- 9% French
- 1% Spanish
- 1% other languages

Types of organizations represented

Most respondents (73%) represented community-based, non-governmental trail organizations, including charities. Of these groups, 74% had fewer than 20 people involved in managing or operating trails. Volunteers made up more than half of respondents (62%), while 38% were paid employees. The most common roles were:

- Board director or director at large
- Executive director
- Trail builder or operations and maintenance

Staff at governmental organizations made up 27% of all respondents:

- 61% municipal or local (town, village, city)
- 18% regional
- 11% provincial or territorial
- 7% federal or national
- 3% Indigenous government

Respondents specified three government departments that are responsible for trails most often:

- Parks and Recreation
- Economic Development or Tourism
- Other

Trail network affiliation

- 70% of respondents represent trails that are part of the Trans Canada Trail network
- 17% of respondents are affiliated with another network

Length of trail managed

- More than half of the respondents manage or operate 50 km of trail or less
- 15% manage or operate between 51 and 100 km
- 30% manage or operate more than 100 km
- 16% manage or operate more than 200 km

Accessibility and inclusion

Diversity, equity and inclusion practices

- 37% of respondents said their organization uses diversity, equity, inclusion and accessibility (DEIA) principles in their hiring practices
- Half of respondents (50%) are interested in learning more about DEIA
- Respondents indicated that they prefer to learn DEIA-related material through webinars and self-paced online courses
- 60% of respondents indicated they did not review or were not sure if they reviewed their trail names with respect to impact on trail users (for example, some trail names perpetuate harmful stereotypes and may discourage use by many trail users)
- 57% of respondents indicated that they regularly collaborate with Indigenous groups for projects
- 51% of respondents report that their trails are accessible for people with disabilities

Black, Indigenous and people of colour

Respondents were asked to estimate the percentage of their staff or team that identifies as Black, Indigenous or as a person of colour (BIPOC):

- No staff are BIPOC: 39%
- 1-9% of staff are BIPOC: 29%
- 10-24% of staff are BIPOC: 0%
- 25-49% of staff are BIPOC: 4%
- 50-74% of staff are BIPOC: 1%
- 75-100% of staff are BIPOC: 1%

Preferred not to answer or not applicable: 27%

Respondents also identified the percentage of management positions occupied by BIPOC:

- No managers are BIPOC: 49%
- 1-9% of managers are BIPOC: 21%
- 10-24% of managers are BIPOC: 0%
- 25-49% of managers are BIPOC: 2%
- 50-74% of managers are BIPOC: 2%
- 75-100% of managers are BIPOC: 0%

Preferred not to answer or not applicable: 25%

Women

Respondents were asked to estimate the percentage of their staff or team that identifies as a woman:

- No staff are women: 10%
- 1-9% of staff are women: 16%
- 10-24% of staff are women: 0%
- 25-49% of staff are women: 20%

- 50-74% of staff are women: 20%
- 75-100% of staff are women: 7%

Preferred not to answer or not applicable: 27%

Respondents also identified the percentage of management positions occupied by women:

- No managers are women: 7%
- 1-9% of managers are women: 24%
- 10-24% of managers are women: 0%
- 25-49% of managers are women: 18%
- 50-74% of managers are women: 16%
- 75-100% of managers are women: 10%

Preferred not to answer or not applicable: 25%

Transgender, non-binary, two-spirit and/or gender-diverse

Respondents were asked to estimate the percentage of their staff or team that identifies as transgender, non-binary, two-spirit and/or gender-diverse (shortened below to TGD2S):

- No staff are TGD2S: 45%
- 1-9% of staff are TGD2S: 16%
- 10-24% of staff are TGD2S: 0%
- 25-49% of staff are TGD2S: 1%
- 50-74% of staff are TGD2S: 0%
- 75-100% of staff are TGD2S: 1%

Preferred not to answer or not applicable: 38%

Respondents also identified the percentage of management positions occupied by people who identify as transgender, non-binary, two-spirit and/or gender-diverse (shortened below to TGD2S):

- No managers are TGD2S: 54%
- 1-9% of managers are TGD2S: 12%
- 10-24% of managers are TGD2S: 0%
- 25-49% of managers are TGD2S: 0%
- 50-74% of managers are TGD2S: 0%
- 75-100% of managers are TGD2S: 0%

Preferred not to answer or not applicable: 34%

Nature and climate

Capacity and preparedness

- 16% of respondents believe that their organization has the capacity to manage the impacts of climate change
- More than 60% are currently working on preparedness for climate change or are not prepared at all
- Only 27% of groups expect that their current infrastructure can withstand the impacts of climate change
- 43% of respondents mentioned that their trails are located in a conservation or protected area

Mitigation and management efforts

Respondents were asked which measures are needed to address the impacts of climate change on their trails. The top responses were:

- Erosion mitigation
- Flood mitigation

- Fire risk management
- Tree planting/invasive species/rebuilding of infrastructure
- Habitat restoration excluding tree planting

Staffing and volunteers

Staff

- 61% of respondents say they hire at least one temporary staff member
- Of the groups with staff, most hire between 1 and 4 people
- The majority of temporary staff are students, older adults and retirees
- Temporary staff predominantly work on trail construction or maintenance
- 49% of temporary workers are employed for terms lasting 4-6 months

Respondents were asked which staffing areas were most difficult to fill with qualified candidates. The top responses were:

- Fundraising
- Indigenous expertise
- Trail construction
- Infrastructure building

Volunteers

- Most groups (85%) seek the assistance of volunteers
- 27% of groups that seek volunteer assistance look for volunteers for every project they undertake
- 15% of groups that seek volunteer assistance look for volunteers for at least half of their projects
- The most common average age range of volunteers was 46-60
- 53% of groups who use volunteers reported that volunteers logged more than 250 hours per year

Respondents were asked which employment and staffing challenges were most significant for their organization. The top responses were:

- Volunteer availability
- Recruitment
- Retention of volunteers for long-term service (1 year or more)

When asked what could help respondent organizations to overcome these challenges, common responses included:

- Creation of a volunteer database/sharing/opportunities platform
- Funding
- Increased awareness or support from local media to bring awareness in
- Fundraising training
- Training or webinars or education from professional sources
- Volunteer acquisition strategies
- Volunteer incentive and recognition programs
- Administrative tools for organizational capacity
- Strategies for targeting youth involvement

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

- Infrastructure building
- Fundraising
- Trail construction

Organizational capacity

Funding

- 40% of respondents have an annual budget of less than $40,000
- 22% of respondents have an annual budget of less than $20,000
- Grants and municipal or local funding were identified as the most common source of funds

Strategy and audits

- 68% of respondents indicated their organization has a strategic plan for a period of between 2 and 10 years
- 46% of respondents who indicated their organization has a strategic plan said their plans included trail tourism
- 61% of respondents said they completed a signage audit in the last 12 months
- 64% of respondents said they completed a trail audit in the last 12 months

Projects and investment

Respondents indicated that the primary limitation in undertaking a project is insufficient budget. Of the projects that were ready to be implemented in 2024:

- 38% had a total budget under $50,000
- 28% had a total budget between $50,001 and $250,000
- The remaining projects had a budget over $250,000

Nearly half (44%) of respondents said they were receiving provincial or territorial funding for their project.

Respondents were asked to indicate which types of projects they would like to undertake if more budget were available. The top responses included:

- Trailhead and wayfinding or signage projects
- Resurfacing an aggregate trail
- Improving drainage
- Improving infrastructure like bridges, boardwalks, tunnels, etc.
- Amenity repairs

Tourism

Marketing and perception

- Almost all respondents (98%) said they think their trail is a tourism asset
- Of those who think their trail is a tourism asset, 54% said it is a tourism asset for international visitors
- 85% of respondents said their trail can support a safe and enjoyable single-day trail experience
- 72% of respondents said their trail is marketed to local or regional visitors
- 19% said their trail is marketed internationally
- Only 18% of groups have what is required (like resources, staff, infrastructure or tools) to effectively support new visitors

Respondents were asked to identify their trail's top three selling points. Top responses included:

- Geographic uniqueness
- Uniqueness of trail infrastructure, design and activities
- Canadian heritage or cultural experience

Tourism resources

- 66% of respondents have websites with trail maps
- 19% have a trip planning and itinerary tool
- 36% offer trail condition updates
- 16% do not have a website

Respondents were asked to identify the top five challenges they face in developing a tourism strategy. Top responses included:

- Marketing
- Trail infrastructure

- Other miscellaneous
- Lack of buy-in from the community/low interest in developing a trail tourism strategy
- Community concerns (over-tourism, crowding)

Trail maintenance

- 32% of respondents indicated that they could soon see trail closures due to major infrastructure failures
- 20% of respondents felt problems were imminent (if they didn't take action soon)
- 34% of respondents said their organizations were only able to service their trails annually or biannually
- 64% said their organizations are able to service their trail more frequently than twice a year
- Only 9% or respondents said their organizations service their trails daily

Respondents were asked to identify five priorities that would require additional investment and/or work to ensure trail systems meet user expectations and local trail building standards. Top responses included:

- Maintaining infrastructure
- Trail sustainability
- Installing and maintaining adequate signage
- Environmental issues
- Increased use

American results
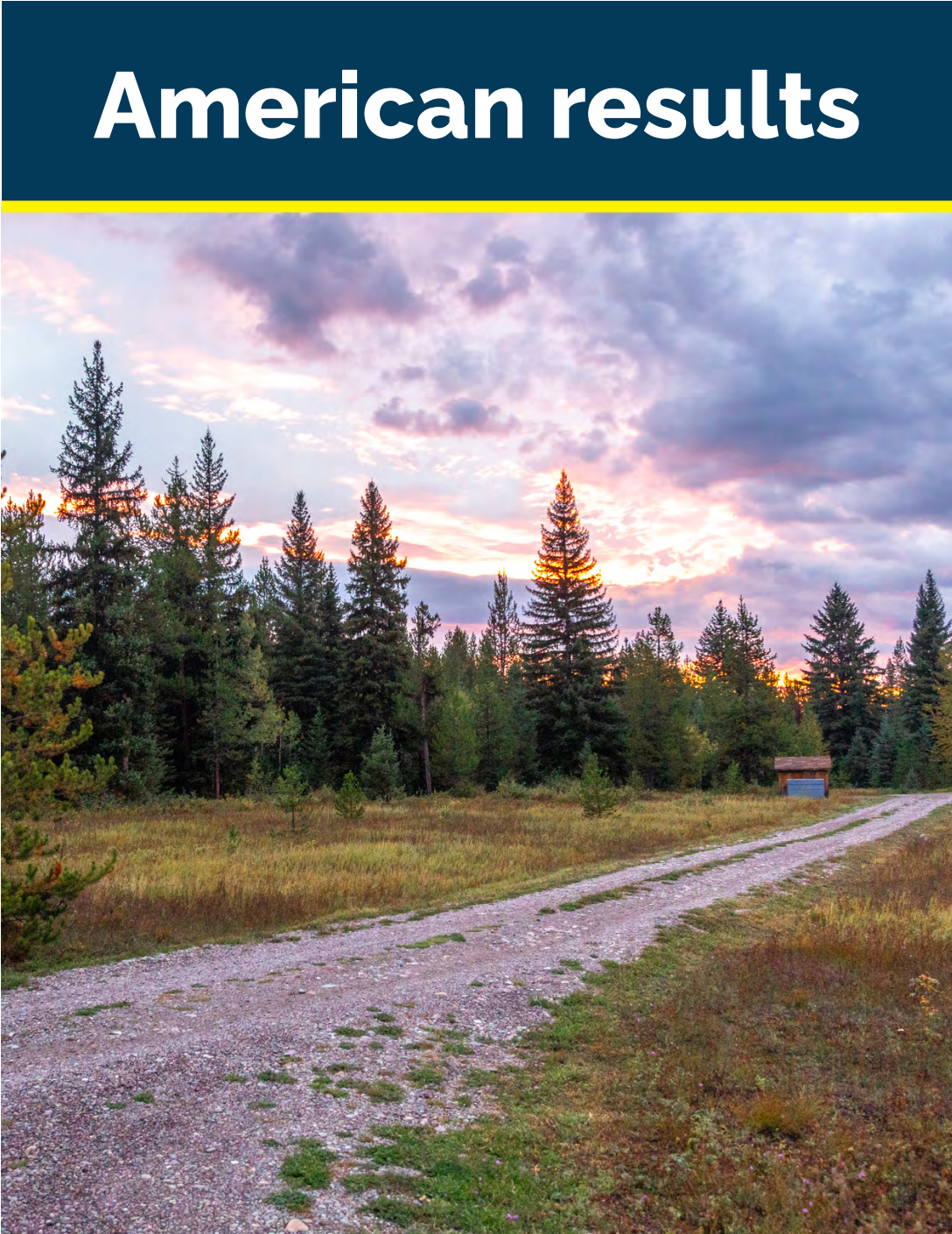
Respondent demographics

Location

Respondents were located in 42 out of 50 states.

Languages spoken

- 99% English
- 1% French
- 1% Spanish

Type of organizations represented

More than half of respondents (63%) represented community-based, non-governmental trail organizations, including:

- 79% registered charities or not-for-profits
- 7% unregistered charities or not-for-profits
- 6% community-based organizations
- 5% for-profit organizations
- 3% volunteers (no affiliation with a trail organization)

Of these groups, 59% had fewer than 20 people involved in managing or operating trails. Volunteers made up more than half of respondents (57%), while 43% were paid employees. The most common roles were:

- Board director or director at large
- Trail builder or operations and maintenance
- Executive director

Staff at governmental organizations made up 36% of all respondents:

- 33% municipal or local (town, village, city)
- 27% regional
- 17% state
- 23% federal or national

Respondents specified three government departments that are responsible for trails most often:

- Parks and Recreation
- Trails
- Other

Trail network affiliation

- 48% of respondents' trails are part of a larger trail network within the United States
- 46% are not part of a larger trail network
- 2% are not part of a larger trail network, but had trails connected with one
- 3% said the question does not apply to them

Length of trail managed

- More than half of the respondents manage or operate 50 km of trail or less
- 12% manage or operate between 51 and 100 km
- 37% manage or operate more than 100 km
- 24% manage or operate 200 km or more

Accessibility and inclusion

Diversity, equity and inclusion practices

- 50% of respondents said their organization uses diversity, equity, inclusion and accessibility (DEIA) principles in their hiring practices
- Half of respondents (50%) are interested in learning more about DEIA
- Respondents indicated that they prefer to learn DEIA-related material through webinars and self-paced online courses
- 50% of respondents indicated they did not review or were not sure if they reviewed their trail names with respect to impact on trail users (for

example, how a name associated with colonialism may exclude, offend or hurt Indigenous communities)
- 42% of respondents indicated that they regularly collaborate with Indigenous groups for projects
- 45% of respondents report that their trails are accessible for people with disabilities

Black, Indigenous and people of colour

Respondents were asked to estimate the percentage of their staff or team that identifies as Black, Indigenous or as a person of colour (BIPOC):

- No staff are BIPOC: 32%
- 1-9% of staff are BIPOC: 29%
- 10-24% of staff are BIPOC: 11%
- 25-49% of staff are BIPOC: 4%
- 50-74% of staff are BIPOC: 2%
- 75-100% of staff are BIPOC: 1%

Preferred not to answer or not applicable: 21%

Respondents also identified the percentage of management positions occupied by BIPOC:

- No managers are BIPOC: 48%
- 1-9% of managers are BIPOC: 20%
- 10-24% of managers are BIPOC: 7%
- 25-49% of managers are BIPOC: 3%
- 50-74% of managers are BIPOC: 1%
- 75-100% of managers are BIPOC: 1%

Preferred not to answer or not applicable: 20%

Women

Respondents were asked to estimate the percentage of their staff or team that identifies as a woman:

- No staff are women: 4%
- 1-9% of staff are women: 4%
- 10-24% of staff are women: 11%
- 25-49% of staff are women: 23%
- 50-74% of staff are women: 26%
- 75-100% of staff are women: 13%

Preferred not to answer or not applicable: 19%

Respondents also identified the percentage of management positions occupied by women:

- No managers are women: 8%
- 1-9% of managers are women: 6%
- 10-24% of managers are women: 14%
- 25-49% of managers are women: 18%
- 50-74% of managers are women: 21%
- 75-100% of managers are women: 14%

Preferred not to answer or not applicable: 18%

Transgender, non-binary, two-spirit and/or gender-diverse

Respondents were asked to estimate the percentage of their staff or team that identifies as transgender, non-binary, two-spirit and/or gender-diverse (shortened below to TGD2S):

- No staff are TGD2S: 36%
- 1-9% of staff are TGD2S: 20%

- 10-24% of staff are TGD2S: 7%
- 25-49% of staff are TGD2S: 3%
- 50-74% of staff are TGD2S: 0%
- 75-100% of staff are TGD2S: 0%

Preferred not to answer or not applicable: 35%

Respondents also identified the percentage of management positions occupied by people who identify as transgender, non-binary, two-spirit and/or gender-diverse (shortened below to TGD2S):

No managers are TGD2S: 52%

- 1-9% of managers are TGD2S: 10%
- 10-24% of managers are TGD2S: 3%
- 25-49% of managers are TGD2S: 1%
- 50-74% of managers are TGD2S: 0%
- 75-100% of managers are TGD2S: 1%

Preferred not to answer or not applicable: 31%

Nature and climate

Capacity and preparedness

- 15% of respondents believe that their organization has the capacity to manage the impacts of climate change
- 66% are currently working on preparedness for climate change or are not prepared at all
- Only 28% of groups expect that their current infrastructure can withstand the impacts of climate change
- 71% of respondents mentioned that their trails are located in a park or protected area

Mitigation and management efforts

Respondents were asked which measures are needed to address the impact of climate change on their trails. The top responses were:

- Erosion mitigation
- Rebuilding of infrastructure
- Invasive species removal
- Flood mitigation
- Fire risk management

Staffing and volunteers

Staff

- 49% of respondents say they hire at least one temporary staff member
- Of the groups with staff, most hire between 1 and 4 people
- The majority of temporary staff are students and older adults
- Temporary staff predominantly work on trail construction or maintenance
- 44% of temporary workers are employed for terms lasting 4-6 months

Respondents were asked which staffing areas were most difficult to fill with qualified candidates. The top responses were:

- Indigenous expertise
- Infrastructure building
- Fundraising
- Trail construction

Volunteers

- Most groups (90%) seek the assistance of volunteers
- 17% of groups that seek volunteer assistance look for volunteers for every project they undertake

- 14% of groups that seek volunteer assistance look for volunteers for at least half of their projects
- The most common average age range of volunteers was 46-60
- 38% of groups who use volunteers reported that volunteers logged more than 100 hours per year

Respondents were asked which employment and staffing challenges were most significant for their organization. The top responses were:

- Volunteer availability
- Expertise and knowledge
- Recruitment

When asked what could help respondent organizations to overcome these challenges, common responses included:

- Creation of a volunteer database/sharing/opportunities platform
- Strategies for targeting youth involvement
- Strategies for community engagement
- Funding
- Increased awareness or support from local media
- Fundraising training
- Training, webinars or education
- Volunteer acquisition strategies
- Administrative tools for organizational capacity

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

- Infrastructure building
- Trail construction
- Indigenous expertise
- Habitat restoration

Organizational capacity

Funding

- 42% of respondents have an annual budget of less than $40,000
- 22% of respondents have an annual budget of less than $20,000
- Donations, grants and memberships were identified as the most common source of funds

Strategy and audits

- 64% of respondents indicated their organization has a strategic plan for a period of between 2 and 10 years
- 37% of respondents who indicated their organization has a strategic plan said their plans included trail tourism
- 54% of respondents said they completed a trail audit in the last 12 months
- 50% of respondents said they completed a signage audit in the last 12 months

Projects and investment

Respondents indicated that the primary limitation in undertaking a project is insufficient budget. Of the projects that were ready to be implemented in 2024:

- 29% had a total budget under $50,000
- 21% had a total budget between $50,001 and $250,000
- The remaining projects had a budget over $250,000

More than a third (39%) of respondents said they were receiving state funding for their project.

Respondents were asked to indicate which types of projects they would undertake if more budget were available. The top responses included:

- Improving infrastructure
- Trail rerouting or reconstruction for sustainability
- Trailhead and/or wayfinding upgrades
- Drainage improvements
- Bridge remediation/replacement

Tourism

Marketing and perception

- Almost all respondents (95%) said they think their trail is a tourism asset
- Of those who think their trail is a tourism asset, 47% said it is a tourism asset for international visitors
- 29% of respondents said their trail can support a safe and enjoyable single-day trail experience
- 45% of respondents said their trail is not actively marketed
- 26% of respondents said their trail is marketed to local or regional visitors
- Only 23% of groups have what is required (like resources, staff, infrastructure or tools) to effectively support new visitors

Respondents were asked to identify their trail's top three selling points. Top responses included:

- Geographic uniqueness
- Uniqueness of trail infrastructure, design and activities
- Conservation/education experience

Tourism resources

- 77% of respondents have websites with trail maps
- 27% have a trip planning and itinerary tool

- 39% offer trail condition updates
- 3% do not have a website

Respondents were asked to identify the top five challenges they face in developing a tourism strategy. Top responses included:

- Lack of necessary industry contacts
- Trail infrastructure
- Marketing
- Host community concerns (over-tourism, crowding)
- Lack of buy-in from the community or low interest in developing a trail tourism strategy

Trail maintenance

- 42% of respondents indicated that they could soon see trail closures due to major infrastructure failures
- 16% of respondents felt problems were imminent (if they didn't take action soon)
- 36% of respondents said their organizations were only able to service their trails annually or biannually
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- Only 11% of respondents said their organizations service their trails daily

Respondents were asked to identify five priorities that would require additional investment and/or work to ensure trail systems meet user expectations and local trail building standards. Top responses included:

- Maintaining infrastructure
- Trail sustainability
- Installing and maintaining adequate signage
- Environmental issues
- Increased use

Thank you

Thank you to all survey participants. We deeply appreciate your insights and commitment to the trail sector in Canada and the United States. For more information about the survey, email **info@tctrail.ca**.

2024 North American Trail Sector Survey Results