

Statewide Trails Strategy 2023–2033

A 10 year strategy for trail development
in South Australia



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First Nations acknowledgment

The South Australian Government acknowledges Aboriginal peoples as the state's first peoples and nations, and that Aboriginal peoples' deep knowledge and relationship with Country continues to be critical in sustainably caring for our lands and waters.





Foreword



Adventure and trail-based activities are growing rapidly with people seeking a deeper connection with nature. Bushwalking, trail running, paddlers, horse riding, mountain biking and aquatic trails are just some of the recreational endeavours contributing to the thriving outdoor industry.

The Statewide Trails Strategy has been created to map the strategic priorities over a 10 year timeframe by maximising the potential of our existing trails network and identifying opportunities for new trail development or improvements.

The Strategy builds on the collaborative efforts from a range of hard-working organisations and volunteers who have been actively creating, promoting, and maintaining our existing trails network for many years.

The Strategy will guide the growth of the trail-based tourism sector in an innovative and sustainable manner. Maintaining South Australia's natural beauty and rich history is paramount. Investment into conservation activities and establishing a framework to guide decision-making with ecological and cultural significance top of mind is a key priority.

The improvement, maintenance, and promotion of our extensive trail network as well as the creation of trail-based businesses, will provide tourism, business and employment opportunities for local communities.

The Strategy also recognises the importance of connecting with nature for the community's mental, social and physical wellbeing. A major focus of the strategy is to develop and promote trail-based activities that are accessible to many different groups for an inclusive experience for a wide range of trail users. From hosting high-level international sporting events to recreational single-day walking loops, we are striving to build an experience for everyone.

I look forward to working in collaboration with key stakeholders, community partners and volunteers across government and non-government organisations to bring the Strategy to life.

Hon. Susan Close
Minister for Climate, Environment and Water



Statewide Trails Strategy

Walkers, hikers, mountain bikers, cyclists, trail-runners, paddlers and horse-riders are just some of the dedicated recreational users of South Australia's trails network.

Our trails span far and wide, guiding visitors through our metropolitan national parks, reserves and the city's parklands, along our sweeping coastlines, through rugged destinations in regional South Australia, and everywhere in between.

They vary from local and regional to national significance, in terms of their scope and scale, their importance as recreation and tourism assets, and their popularity with user groups.

Short suburban trails, multi-day adventures, wheelchair-accessible loops – there really is something for everyone on South Australia's extensive trails network.

South Australia has an ambitious goal: to be positioned as a leading destination for trail experiences.

At a regional and local level, these opportunities will also bring health and wellbeing benefits and job creation, in doing so, it would encourage the state's economy by providing opportunities for trail-related tourism, enterprise and sport development.

Using trails is one of the ways to enable a wide cross section of people to experience the outdoors environment and build a deeper connection with nature.

Like any good trail, the journey is just as important as the destination. This Statewide Trails Strategy is the map that will take us there.



Purpose

The Statewide Trails Strategy outlines how South Australia will reach its goal in the next 10 years of becoming a leading destination for trail experiences.

This will be achieved through:

- Establishing a framework to guide decision-making based on location, ecological and cultural significance as well as coordinated implementation by multiple partnerships
- Developing targeted new and upgraded existing trail infrastructure across the state
- Identifying sustainable funding opportunities for long-term trail development, maintenance, marketing and promotion; and
- Providing world-class supporting infrastructure to boost tourism, enterprise and high-level events.

Delivering this strategy would ultimately result in:

- Increasing outdoor activity participation.
- Investment into conservation activities.
- Direct impact into local and regional economies, through local trail procurement and visitor spend.
- Job creation and upskilling, increasing business enterprise and expanding export and investment opportunities.
- Tailored insights to better inform key partners and industry to improve the visitor experience; and be used as a measurement tool for decision-making.
- Improved digital footprint to enhance the visitor experience.
- Hosting high-level events, showcasing South Australia to the world.
- Increasing home-grown athletes who use recreational trails in South Australia.
- South Australia being recognised as a leading trails destination.

The following principles will be applied in achieving the strategy

Overarching Principles



Use South Australia's key and unique assets to gain competitive advantage



Value and encourage community engagement and localised community action



Grow the sector in a sustainable manner with nature at its heart



Focus on strategic issues and opportunities – prioritised through critical assessment



Apply a detailed, explicit action plan through engagement with key partners



Use relevant data and best practice to inform, engage and determine strategic action



Encourage trail users to value and respect different user groups as well as the environment they are in



Priority areas

The strategy is focused on **six priority areas**

- 1** Collaboration with relevant partners to lead and implement the strategic direction.
- 2** Create a central hub to drive and grow South Australia's visitor experiences through development and promotion.
- 3** Develop and promote the opportunities and benefits of physical activity and trail sports.
- 4** Identify a hierarchy of trail provision.
- 5** Grow enterprise to increase sustainability and resilience across South Australia.
- 6** Optimise local and regional economic outcomes associated with hosting national and international events.



Priority 1: Collaborate with relevant partners to drive and manage the strategic direction.

A consistent and coordinated approach between all partners with a role in trail planning, delivery and promotion required.

Actions:

- Secure buy-in from key government departments, non-government bodies and volunteer organisations to provide a central lead to drive appropriate sustainable governance models.
- Recognise and support the vital role of volunteers in trail creation, promotion and maintenance.
- Establish relevant working groups to manage strategic priorities.
- Develop a robust and sustainable funding model/investment strategy.
- Create and support business/volunteer groups to support strategic priorities, engage communities and work on specific goals using a sustainable approach.
- Ensure aspirations and knowledge of key stakeholders are understood and considered so that their skills and knowledge are best utilised.
- Facilitate the opportunity to share relevant data to inform decision making.

Priority 2: Create a central hub to drive and grow South Australia's visitor experiences through development and promotion.

A central hub will improve collaboration to manage and support projects that are in line with the strategic priorities.

Actions:

- Determine the role, development and management of a central informative hub so that it has a strong governance base on which to build.
- Collect market analysis to understand the needs and expectations of the target market(s) to deliver clear strategic planning.
- Work together to share relevant data to help inform decision making and understanding emerging trends.
- Collaborate with commercial tour operators and other industry to achieve high quality marketing and promotion of South Australia's unique visitor trail experiences while increasing visitor numbers.
- Develop marketing initiatives to raise awareness of trail etiquette between different user groups.
- Signpost funding opportunities to South Australian councils, groups and businesses.
- Investigate the opportunity for the central hub to support other tools and resources such as insurance options, GIS mapping etc.
- Continue to review visitor experiences with their expectations so that customer service excellence is a drawcard.
- Apply consistent signage across trail networks to improve experiences
- Provide a web portal for visitors, commercial partners, industry, peak bodies and tourism destinations.

Priority 3: Develop and promote the opportunities and benefits of nature, sport and physical activity.

Trails are made accessible to many different groups in the community in order to promote community health and wellbeing.

Actions:

- Liaise with relevant partners to promote nature, health and wellbeing and environmental benefits.
- Work with community partners to ensure broad community benefits from trail infrastructure.
- With a continuum of trails across the state, maintain strong local engagement to support the achievement of skill development.
- Consider linkages across all partners including opportunities within the education curriculum to promote nature, health and wellbeing.
- Leverage opportunities associated with Adelaide's status as a National Park City.
- Facilitate relevant pathways with national organisations to develop South Australian athletes to compete interstate and on the world stage, highlighting to the world the level of trail infrastructure in South Australia.
- Explore options to house the Australian Mountain Bike team and other national related organisations in South Australia.

Priority 4: Identify a hierarchy of trail provision (see appendix 1).

There is a need to identify and critically assess suitable locations and projects (existing and new), avoiding high conservation and biodiversity value areas, to develop exceptional experiences supported by best practice infrastructure and prioritise these for investment.

Actions:

- Prioritise improvements to existing and new trails and facilities to enhance the visitor and participant experience whilst appropriately protecting natural areas.
- Identify the iconic trails within the state which have the attributes for international and national recognition.
- Consider mapping statewide trail experiences to identify opportunities for linkages, for varied user groups, to be considered for investment.
- Implement a staged program of trail development.
- Consider private sector partnerships to improve and support trail experiences.

Priority 5: Grow enterprise to increase sustainability and resilience across South Australia.

Opportunities are realised for trails to support growth in tourism resulting in increased visitors, spend, new business enterprises and job creation.

Actions:

- Better promote existing trails and facilities.
- Explore best practice for maintenance/management models for more sustainable outcomes.
- Support capability building including entrepreneurs and small business.
- Utilise economies developed through trail use for innovation, enterprise, upskilling, industry growth, information sharing and ecosystem coordination.
- Make it easy for those who want to grow or leverage trails to gain support and tools.
- Establish the baseline economic benefits of trail experiences and key indicators to support future operations and further business case development.

Priority 6: Optimise local and regional economic outcomes associated with hosting national and international events.

Identify opportunities to host events which have flow on benefits for surrounding communities.

Actions:

- Liaise with relevant partners and industry to identify event locations and gauge the level of development or enhancement required.
- Create a trails events strategy which includes a prioritised list of targeted events to attract and local events to support.
- Establish a conservation offset model for environmental benefit, as a result of trail use during events.
- Develop successful case studies to support advocacy.
- Grow regional capability to host national and international events through partnerships.

Delivery

Successful delivery of the Statewide Trails Strategy requires a strong collaboration between key government and non-government organisations and volunteers.

A Trails Working Group will be responsible for the ongoing delivery of the Statewide Trails Strategy. Expression of interests will be sought from interested parties to form the next steps of governance/working groups. Representatives from these parties will consult with other organisations and groups including Traditional Owners, Regional Development Australia SA, state government, local government, peak bodies, volunteers, the recreation and sport sectors, tourism bodies and business associations.

The local community is also key to the future success of trail destinations within South Australia. Local groups will be supported around key destinations with the community at their heart. Equally as important, they will be ambassadors, volunteers and a driving force for future investment and development. Much of this may be facilitated by local government, with some coordination taking place through a central hub.

Alignment with Government Policy

- South Australian Health and Wellbeing Strategy 2020
- Healthy Parks, Healthy People South Australia Framework 2021-26
- The Physical Activity in Nature Action Plan, 2021-24
- South Australian Aboriginal Health Promotion Strategy 2022-2030
- South Australian Walking Strategy 2022-2032
- Visitor Economy Sector Plan 2030, SA Tourism Commission
- Regional Development Strategy, PIRSA
- Regional Visitor Strategy 2025, SA Tourism Commission
- Heritage Tourism Strategy 2021, Department for Environment and Water
- South Australian Walking Strategy (2022-2032), Wellbeing SA
- Recognition of Adelaide National Park City: National Park City Foundation status





Key Target User Groups

The strategic priorities highlight the need for wide collaboration of government departments, non-government organisations, volunteers and the various trail user groups. An integral process will ensure the strategic vision is achieved.

Main user groups

For the purpose of the strategy, the main user groups identified are:

- **Walking** (hiking, bushwalking, nature and shared-use trails) identified as the largest Parks' user group at 89%¹ (with 1,580km of walk only trails²)
- **Mountain Biking/Cycling** (cross-country, downhill, enduro and gravel as well as shared-use) on local, regional and hero trails. Prior to Covid-19 there was an increased growth in mountain biking across Australia and this continues to grow as one of the fastest family friendly lifestyles in Australia. Currently registered at 13%³ of Parks' users (with 10km of bike only trails; 460km of shared bike and walk trails; as per visitation survey, 2020⁴)
- **Other** (trail-running, orienteering, rogaining, horse-riding, shared-use, aquatic (canoe, paddle, scuba and heritage). A breakdown on market share is required for this section of trail users.

The above groups identify several trail types and groups. The strategy will incorporate trails from different land tenures both public and private; and include road reserves, disused rail corridors and reservoirs if appropriate.

Mountain biking, trail running and many categories within the 'Other' section are relatively new user groups in South Australia and have only received limited investment to date. With the right strategic investment, a significant increase will be realised across the South Australian economy.⁵

While each group of trail users have discreet needs, it will still be important to market South Australia as a trail destination offering multiple trail experiences.

- 1 South Australian Parks Visitation Survey 2020. Source: Department for Environment and Water
- 2 National Parks only, Department for Environment and Water
- 3 South Australian Parks Visitation Survey 2020. Source: Department for Environment and Water
- 4 National Parks only, Department for Environment and Water
- 5 Note – the above measurements are National Parks data only due to availability at the time of the publication of this report.

Target Audiences

Listed below is a breakdown of different markets that will be targeted through the strategy.

Key groups include:

- **Community** – local people, groups and clubs. Community covers a vast array of people, from volunteers such as the ‘Friends Of’ groups to members of different trail users’ maintenance teams. First Nations groups who have managed the land the trails are on for thousands of years and continue to do so, to clubs who use/recreate the trails. Promoting and maintaining as well as raising awareness of the benefits of trails in an environmental setting from young through to more senior members.
- **Education** – nature, sport, engineering, product development and trail development/ maintenance.

Above are key areas to be utilised and key partnerships are education and trail development. Collaboration with key education institutions is also an area that will add to the success of the strategic vision through:

- the engagement of children and young adults with trails
- establishing trail developing training in a very fast growing industry, and
- Increasing knowledge and participation in the natural environment

Further breakdown on the different user group trail types will be realised in the framework being developed for assessing projects going forward.

- **Recreation and Sport** – local, schools, families, unstructured recreational usage, clubs, international/ national training camps.

Key market groups include recreation and sport development pathways as this is key to both, health and wellbeing of all user groups and the sport sector for South Australia to compete on the world stage. With improved existing and an increase of international level infrastructure, South Australia will be equipped with facilities for both recreational use and for athletes to train and compete on.

This development will provide local level competition and recreation as well as developing the sector to achieve high-end events and contribute to tourism.

- **Tourism** – local, intrastate, interstate and international markets.
 - The Statewide Trails Strategy's vision is ‘to position South Australia as a leading Trails Destination’. A coordinated marketing plan to highlight South Australia’s competitive advantage as a trails destination will be developed to increase interstate and international visitor numbers⁶³.

South Australian Visitor Economy insights⁷ report:

Domestic day	Visitors (000)	Nights (000)	Expenditure (\$m)	Av. Spend per visit	Av. Spend per Night	Av. Length of Stay	Market Share
Day Visits	14,775	-	\$1,593	\$108	-	-	66%
Intrastate	4,392	12,816	\$2,115	\$482	\$165	3	20%
Interstate	2,651	12,244	\$2,281	\$861	\$186	5	12%
International	469	10,556	\$1,150	\$2,451	\$109	23	2%

- **Enterprise** – for example, manufacturers, entrepreneurs and business start-ups.
To support the achievement of the strategic vision, different sectors have an integral role to play to have a direct economic impact as well as job creation. The trails network requires infrastructure; facilities; hospitality; manufacturing; retail; sport and research and development.

- **Other groups include:**
 - Public/private landowners
 - State/local governments

6 Findings have highlighted the lack of visitor analysis. Strategic priority two includes the collection of data to understand the needs and expectations to deliver high-quality visitor experiences; and for future strategic decision making/planning.

7. International and National Visitor Survey June 2020. Source: SA Tourism Commission

Appendix 1: Hierarchy of Trail Provision

Trail development should take place in a strategic manner, where developments are within the context of trail development and provision as a whole. In order to be strategic, trail development and provision should be within a recommended hierarchy as follows:

National

Trail networks or products which are of significance in terms of their scope and scale, economic impacts, and importance as recreational and tourism assets. They are trail developments which are of the highest profile and aimed at the largest possible market and intended to be at the peak of trails based tourism and recreational activity. They can be a primary driver for attracting interstate or overseas visitors and must be of the highest possible value and quality.

The user groups within this section currently have a smaller market share in visitor numbers with a higher visitor spend (global trends indicate many of the above are fast growing markets). These trails will be marketed to international and interstate visitors.

Regional

Trail networks or products which are of regional significance and value in terms of their scope and scale, economic impacts, importance as recreational and tourism assets and their significance in relation to overall trail provision within the state.

The user groups that visit regional trails have a high market share of visitor numbers with a lower visitor spend than national trails, however a significant spend all the same. The trails in this category will be marketed to interstate and intrastate visitors.

Local

Trails which have greatest relevance and impacts in local areas. They are by their very nature closely associated with communities, often in urban or urban fringe settings and can often be very accessible from adjacent communities. Their scope, scale and nature are such that their immediate impacts are as local recreation resources rather than tourism assets. However they can be considered of regional importance when looked at collectively with other nearby local or regional trails.

They can also be of particular value in terms of contributing to health and wellbeing, encouraging physical activity and allowing people to discover and connect with nature in ways that support their wellbeing.

The user groups that visit local trails have a relatively high market share of visitor numbers, albeit a lower visitor spend than both national and regional trails. The trails in this category will be marketed to intrastate visitors and more specifically, people who travel less than one hour to a destination.



Appendix 2: Best Practice

Trail-based activities are increasing in popularity, and users are expecting more from their trail experiences, therefore destinations must take a strategic approach to trail development and management. Whether it's walking, trail-running, mountain biking, equestrian or aquatic, recreational trails are now an integral product for many destinations. Developers of tourism products will be required to coordinate the provision of high quality trails with other supporting infrastructure, from destination access through accommodation and hospitality

to event overlays. Other, non-trail related experiences can also add value to a destination, and should be seen as complementary investment opportunities.

Adventure tourism currently has a global value of \$586bn (USD) with a potential to grow to \$1,627bn (USD) by 2026⁸. Adventure and nature-based tourism are growing exponentially worldwide as governments at all levels, have increased initiatives in the form of public and private partnerships to promote tourism.



Walking/Hiking/Trekking

Walking tourism is an increasingly popular way to experience a destination. It allows tourists to engage more with local people, nature and culture and also provides travellers with options for physical activities during their travel. Walking tourism can be developed with relatively small investment and in combination with the destination's unique nature and culture. It can contribute to economic development through the provision of new job and business opportunities.

New Zealand Tourism reports, international walking visitors spend up to 20% more compared to the average spend of other visitors.

Examples of best practice (walking) –

- **Kepler Track, New Zealand**

- The track is a 60 km (37 miles), three to four day loop track that runs through the gentle, beech-forested shores of lakes Te Anau and Manapouri to the tussocky alpine mountain tops along Mt Luxmore.
- It is an excellent track for those who want an adventure with a level of physical challenge and has excellent accommodation and cooking facilities.
- As one of New Zealand's Great Walks, the track is built to a very high standard with the benefit of comfortable, serviced huts and unlike several other tracks, many camping opportunities. Most streams are bridged, boardwalks cover boggy areas and the very steep sections have steps.
- The Kepler Track is also home to the Kepler Challenge, an annual running race that traverses the whole 60 km and which the winners complete in less than five hours.

- **Heysen Trail, South Australia**

- South Australia's 1,200 km Heysen Trail extends from Cape Jervis, on the Fleurieu Peninsula, to Parachilna Gorge, in the Flinders Ranges, traversing coastal areas, native bushland, rugged gorges, pine forests, vineyards, rich farmland and historic towns.
- It caters for both the serious backpacker hiking the entire trail and for walkers doing day walks along shorter sections.
- The trail is managed by a partnership between:
 - Volunteers of the Friends of the Heysen Trail
 - Department for Environment and Water, and
 - Volunteer walking clubs, landholders and individuals

The 'Friends of the Heysen Trail' (FOHT) committee coordinates volunteers; trail reports; plan work and budget; liaise with landholders and contractors; promotion, which is planned, managed and funded by the committee; and manage the Volunteers Walk Leaders plan.

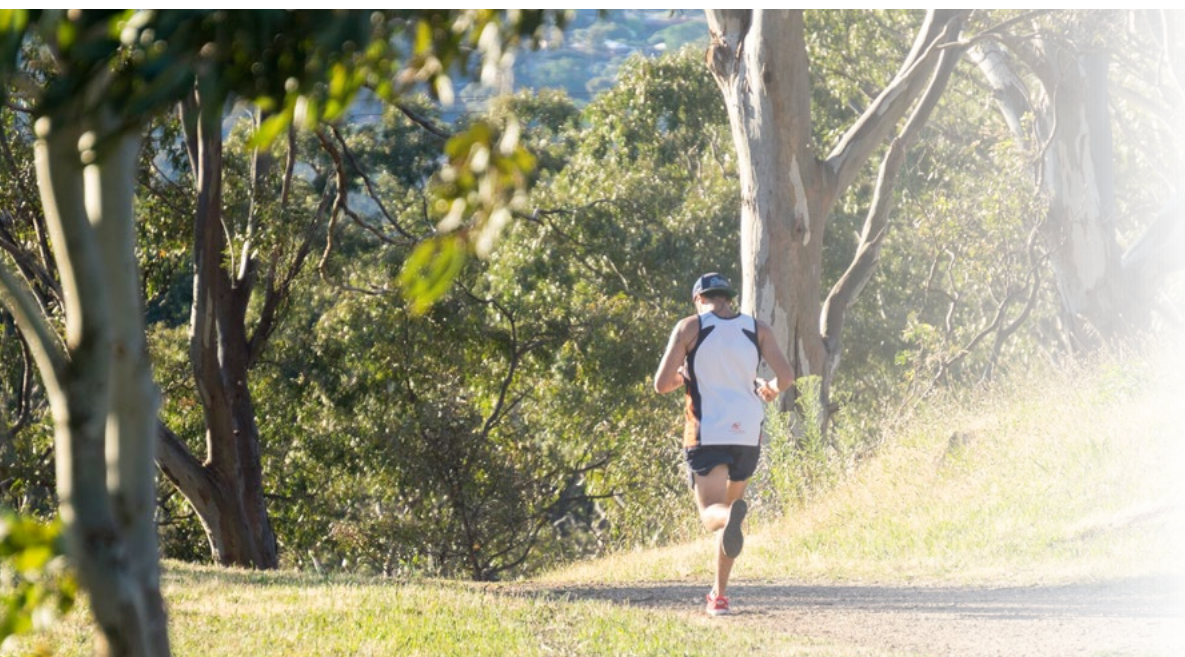
- Membership:
 - 2209 individual people (1799 memberships)
 - 150+ active volunteers
 - Volunteer hours 5593 (2020)



South Australia Market Information⁹

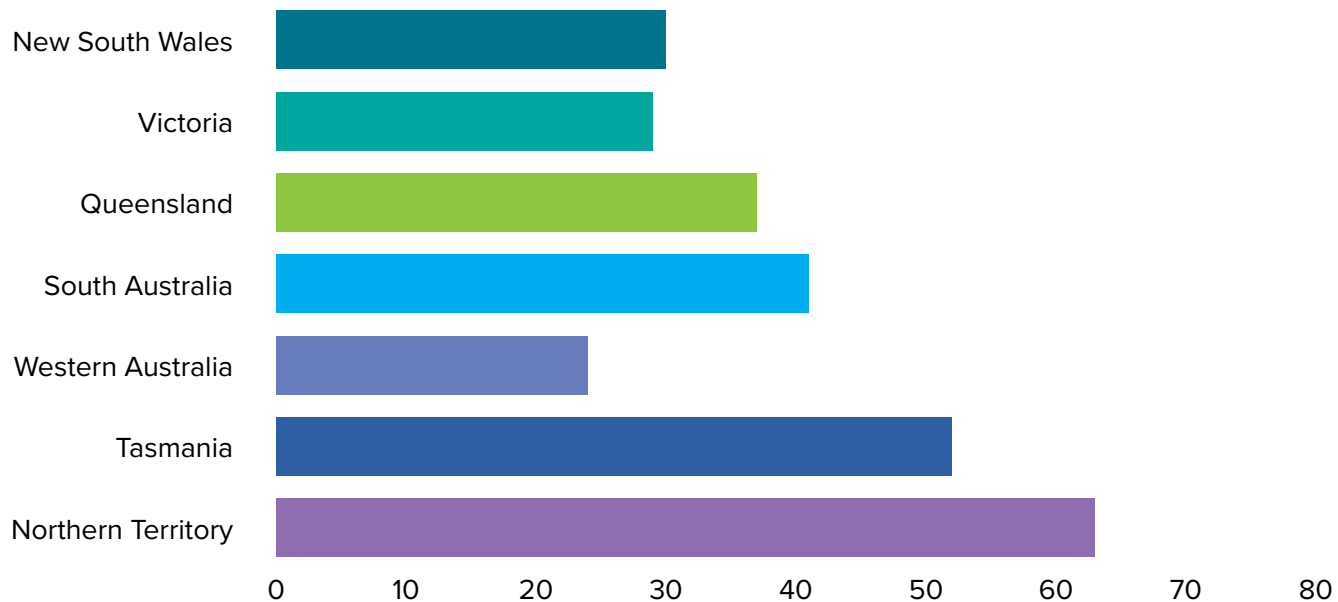
- Tourism is a high growth sector and an economic priority of South Australia.
- 5% of leisure day trips undertaken in South Australia over the period 2017-2019 involved ‘bushwalking/ rainforest walks’ as an activity. This equates to 510,000-day trips over an average 12-month period.
- Average day trip leisure expenditure in South Australia for the period 2017-2019 was \$105 per trip. This equates to total expenditure of \$54 million by day trip visitors that bushwalk.
- 12% of all overnight domestic leisure visitors to South Australia participate in ‘bushwalking/rainforest walks’ as a component of their visit. This represents around 621,000 visitors annually over the period 2017-2019.
- The average expenditure by domestic overnight leisure visitors was \$532 per visitor over the period 2017-2019. This equates to a total expenditure of \$331 million by overnight visitors that bushwalk.
- More than one third (41%) of international leisure visitors to South Australia participate in ‘bushwalking/ rainforest walks’ as a component of their trip to Australia. While this activity may not necessarily occur in South Australia it represents an average of 158,000 visitors annually.
- The average length of stay by international leisure visitors (holiday/visiting friends and relatives) to South Australia was 14 nights over the period 2017-19 while the average spend per trip in South Australia over the same period was \$1,257. This suggests expenditure by international leisure visitors to South Australia who bushwalk as a component of their trip of around \$199 million.
- The estimated expenditure made by day trip and overnight leisure visitors in South Australia who bushwalk is summarised below.

	Day Trip	Domestic Overnight	International	Total
Visitors	510,000	621,000	158,000	1,289,000
Expenditure (m)	\$54	\$331	\$199	\$584



9. All statistics are the annual average for the year end Dec 2017 – Dec 2019 and relate to leisure visitors (Holiday plus Visiting Friends and Relative purpose visitors). International Visitor Survey (IVS) 2017-19. Source: Tourism Research Australia

Percentage of international leisure visitors within each state who participated in bushwalking:





Mountain Biking/Off-Road Cycling/Recreational Cycling

Prior to Covid-19 there was an increased growth in mountain biking across Australia and this continues to grow as one of the fastest family friendly lifestyle activities in Australia. Cycle tourists typically stay longer, spend more and engage in a broader range of experiences than the average visitor, and as a result, can become a driver for increased economic prosperity. Studies have identified that a cycle tourist's average spend is higher than domestic visitors and their overall trip spend is nearly five times as high¹⁰

Examples of best practice (Mountain Biking) –

- **Tasmania, Australia**
Blue Derby (Mountain Bike capital of Australia)
 - Initial investment of over 80 km of purpose built mountain bike trails
 - Voted the best trail in the Enduro World Series (EWS) in 2017 which was the first time the competition was staged in Australia
 - Attracts 30,000 visitors every year
 - Visitors spend on average four to five bed nights then a further five nights elsewhere in Tasmania
 - Return in investment \$30 million per year
 - Further investment of 66 km for Stage 2
 - Identified conflict requiring community engagement/consultation in development process, for industries to co-exist
 - Further development in Blue Derby in 2018 added an extra 100 km+ of trail
 - North-west predicted to attract 138,000 new visitors annually
 - Created 51 full time jobs/contributing
 - \$6.88 million to the economy¹¹

- **Scotland, UK**

A world-class trail network

- Leader in mountain bike innovation
- Tackling Scotland's Issues of Health and Wellbeing
- Scottish athletes achieving on the world stage
- Mountain bike market value - \$240 million
- Tourism value - \$114 million¹²

In relation to the hierarchy of trail provision, the national user groups currently have a smaller market share in visitor numbers, with a higher visitor spend. The 7stanes trail network in Scotland is an example of this growth. The network offers enthusiast and expert rider trails, as well as trails for families. This has resulted in achieving the family market spend and significantly growing the more technical trail user groups; and providing trails of appropriate challenge for the growing number of athletes competing on the world stage.

Another best practice initiative run successfully within Scotland is a Mountain Bike Trail Therapy programme. This is an innovative intervention programme that through mountain biking and a combination of more traditional therapy techniques, support is given to those diagnosed with mental health issues.

The project in partnership with the health service is delivering real health outcomes.

Many global studies are reporting the positive impact of getting outdoors with improved physical and mental health.

10. Faulks, Ritchie & Fluker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC

11. Mountain Bike Australia

12. Estimating the Holistic Value of Scotland's Mountain Bike Sector

Other

Categories within 'Other Trails' section are fast growing markets, in line with global exponential growth within nature-based and adventure tourism.

Examples of best practice (other) –

- **Canoe NI, Northern Ireland**

- The project involved the development of six inland and three coastal canoe trails and centred on establishing Northern Ireland as a destination for canoeists and kayakers through the development of a number of trails, each with regional significance. When combined the regional trails are considered to have national or possibly international significance (i.e. for visitors from the rest of the UK and the Republic of Ireland).
- One of the key drivers behind creating the canoe trails was to make Northern Ireland's waters more accessible to a wider range of users by prescribing key routes, establishing formal access and egress points and developing support facilities such as parking, signage, campgrounds and bothies (huts).
- Another aim was to create a destination for canoeists by firstly developing a coherent trail product which could be marketed and branded and secondly by providing accessible information on all kayak and canoe opportunities in the province. Central to this was the development of a comprehensive web site, where detailed information on each trail can be accessed, including possible itineraries, accommodation, camping facilities and bothies.

- This initiative shows how a very effective trail product can be developed which has impacts at local, regional and national level. This has been achieved by ensuring that the trail model is as flexible and accessible as possible and that key features of the trail product are well developed. In particular, very effective trail information and guidance is centred on a user friendly website, backed up with high quality on site interpretation and signage.

In addition, the project shows how the key prescribed elements can be very useful marketing tools for a wider canoeing product¹³.

- **North Forest Canoe Trail, North America**

- One of the most well-known water trails in the United States
- 740 mile water trail that travels through four U.S. states, and one Canadian province
- Paddlers infused local communities with \$16 million and supported 280 jobs
- 90,000 paddlers annually
- 44% are non-local
- Average person spends \$52 in the NFCT region
- Average group spends \$290 with non-locals spending an average of \$619 per trip
- 12% paddlers used a guide service¹⁴
- Evidence shows that this trail benefited existing businesses – outfitters, restaurants, hotels etc.



13. South Australia Recreational Trails – Master Plan 2015-25

14. The Northern Forest Canoe Trail: Economic Impacts and Implications for Sustainable Community Development

Appendix 3: Assessment Criteria

The Statewide Trail Strategy positions South Australia as a leading destination for trail experiences. In doing so, it increases health and wellbeing as well as economic impact through boosting trail-related tourism, enterprise and sport development.

The strategy recognises key priorities to be met through the development of appropriate projects. These projects may contribute to hard or soft infrastructure, but should all have outcomes that approach the stated vision.

Investment into these projects should be objectively assessed against criteria which guide appropriate development against these aims. The tool which follows will allow projects to be assessed against the Statewide Trails Strategy priorities/vision.

Projects are broken down across key elements and considerations, with points awarded where the project meets key requirements. Points allocated to areas such as hierarchy, events, tourism etc. are subject to change to represent current state priorities. Projects should ideally achieve a high score to be recommended for funding.



Item	Recommended	Score if met in full	Notes
Strategic Priorities			
To be met through successful implementation of trail project (select all that apply)			
<p>Collaboration</p> <p>– Statewide collaboration of key relevant partners to drive and manage the strategic direction.</p>	<p>State the project’s key partners, providing detail and level of participation.</p>	10	<p>3 – Minimal collaboration</p> <p>5 – Collaboration at a local level</p> <p>10 – Project anticipates collaboration between all levels of government, community groups, private sector</p>
<p>Central Hub</p> <p>– Create a central hub to drive and grow South Australia’s visitor experiences through development and promotion.</p>	<p>The central hub will be the centre of all recreational trail information and activity within South Australia. Identify measures your project will collaborate with the hub.</p>	10	<p>3 – Commitment to provide trail, facilities and business information for the overall hub digital interface</p> <p>5 – Commitment to provide visitor analysis to advise the hub of market needs and expectations</p> <p>10 – Commitment to provide both trail and relevant information; and visitor analysis</p>
<p>Physical Activity/Sports</p> <p>– Develop and promote the opportunities and benefits of nature, physical activity and sport.</p>	<p>Detail the opportunities linked to your project to promote physical activity and/or sport.</p>	10	<p>10 – Collaboration with local schools/community/ First Nations groups to encourage outdoor activity/ cultural determinants which will benefit health and wellbeing; and/or collaboration within the sports industry to provide infrastructure to improve sporting activities; or collaborate with either of the above to promote access for all outdoor activities</p>
<p>Hierarchy</p> <p>– Identify a hierarchy of trail provision.</p>	<p>Trail networks and products differ in significance in terms of scope and scale, economic impact and importance as a community/tourism product. Identify what level in the hierarchy your project fits.</p>	10	<p>3 – Local level project, mainly benefiting intrastate visitors and local communities</p> <p>6 – Regional level project, mainly benefiting interstate and intrastate visitors</p> <p>10 – National level project, mainly benefiting international and interstate visitors</p>
<p>Enterprise</p> <p>– Grow enterprise to increase sustainability and resilience across South Australia.</p>	<p>Indicate measures of potential growth as a result of your project.</p>	10	<p>3 – Collaborate with relevant business network(s) to leverage opportunities</p> <p>3 – Partner with local entrepreneurs, to retain tourism spending in the local economy</p> <p>6 – Partner with individuals, groups or organisations that offer diverse tourism products or in kind support through volunteering</p> <p>10 – Provide training/upskilling opportunities to drive innovation, research and commercialisation</p>

Item	Recommended	Score if met in full	Notes
Events – Optimise opportunities to host national and international events.	Indicate type and level of event(s) you will have the ability to host as a result of the project.	10	3 – Project will have the ability to host local events 5 – Project will have the ability to host national accredited events 10 – Project will have the ability to host international accredited events
Planning Development and Management Criteria			
Appropriateness of site.	Ecological Sustainability – Assess the significant effects of new and existing trail projects on the environment. As well as processes to build new infrastructure to be resilient to extreme weather events.	10	6 – Evidence provided in concept/design plans to include trail resilience 8 – Provide environmental impact assessment (level dependent on varying factors) 10 – Maintenance models to include building resilience into our existing networks
	Culture and Tradition – Integrates with existing character and heritage context.	10	0 – Not included in plans 5 – Plans for tourism are sensitive and respectful of the living culture and traditions and not interfering with its practice 10 – Collaboration with local culture or traditional groups/businesses to provide a genuine or authentic experience
	Accessibility – Where practical, sites, facilities and services are accessible to all, including individuals with disabilities, specific access requirements or other special needs. (Provide evidence in design plans).	10	0 – No plans to include access for all 5 – Provision for part access for all 10 – Full access for all
Product innovation.	Demonstrate in what way your innovative idea/concept/product will grow your project and be more desirable than your competitors.	5	1 – Provide evidence of new innovative idea/concept/product 3 – Provide evidence of collaborative measures to implement idea/concept/product 5 – Provide evidence in what way the idea/concept/product will create or add value

Item	Recommended	Score if met in full	Notes
Sustainable maintenance plan.	Provide a developed and funded trail sustainability plan (provide evidence).	15	1 – Maintenance management has been acknowledged and costed in the concept plan 8 – Trail owners have agreed to ongoing management 15 – Trail has a specific long term management plan and funding for ongoing maintenance is allocated
Supporting infrastructure (trail related).	1. Provide evidence the project is (or will be) supported by associated facilities, including but not limited to roadway signage, car parking, toilets, drinking water.	10	3 – Concept plan acknowledges and includes cost for trailhead/trail signage 5 – Concept plan makes use of existing facilities 8 – Concept plan includes toilet and car parking facilities 10 – Project includes the above and provides extra infrastructure to enhance the visitor experience i.e. nature watch areas, playground equipment, augmented reality (AR), café, camping etc.
	2. For long distance trails, provide evidence that lodging/campsite is available at suitable distances (dependent on primary mode of access).	5	1 – Accommodation available within accessible distance of the trail 3 – Accommodation available along the trail 5 – Hero accommodation options are provided along the trail, which may include CTO access for luggage transportation or fine dining options
Sustainable Development			
Project provides direct and indirect benefits to the State's economy.	1. Provide analysis that demonstrates a positive return on investment (financial and other) for the trail project.	20	5 – Increasing the number or value of jobs 10 – Creation of new businesses or the production of goods and services 15 – Project has secured private investment 20 – All of the above
	2. Provide analysis that demonstrates the project's efficacy at drawing new visitors to the area.	20	10 – Will attract intrastate visitors to the region 15 – Will attract interstate visitors to the region 20 – Will attract international visitors to the region

Item	Recommended	Score if met in full	Notes
Constructability and longevity			
Potential to leverage funding.	Confirm funding (grants and co-funding streams) committed at this stage of the project.	15	1 – 10% of project funds 5 – 50% of project funds 10 – 100% of project funds 15 – Funding available for future stages of the project
Landholder permission/ authority.	Confirm partial access for trail has been established (provide evidence).	5	0 – No 3 – Further specific approvals i.e. environmental 5 – Yes
Concept designs.	Confirm concept designs are complete with relevant stakeholder approval (provide evidence).	5	0 – No 5 – Yes
Detailed designs with professional cost estimates for construction.	Confirm detailed designs are complete with relevant stakeholder approval and include cost estimates (provide evidence).	10	0 – No 10 – Yes
Requirement for product			
Market gap/demand for product.	Provide evidence of a clear market gap for this product, with respect to the relevant trail hierarchy.	20	5 – Market data through visitor feedback/surveys etc. 10 – Clear indication that community groups have been formed to champion the project 15 – Detailed report by appropriate body suggesting the gap. 20 – All of the above
Critical connectivity.	Identify in what way the project will provide connectivity between icon sites or experiences.	10	1 – Application to note the connectivity to existing sites or experiences 3 – Application to note if the project provides connectivity where not normally experienced 5 – Application provides new innovative connectivity

Item	Recommended	Score if met in full	Notes
Destination Development			
Destination support capacity.	<p>Provide evidence that the precinct/region in which the trail project sits has the capacity to support the expected increase in visitation.</p> <p>Evidence provided ensures that current (or proposed and committed) supply will meet the new demand.</p>	10	<p>3 – Collaboration with stakeholders who are responsible for the planning or delivery of components of the destination management process</p> <p>6 – Assessment of available resources in visitor attractions, culture, infrastructure, transportation, accessibility, support services and accommodation</p> <p>10 – Inclusion of findings with recommendations in project plans, concept designs etc.</p>
Responsible tourism.	Specify integration of regenerative practices and community-focused initiatives into the offering.	10	<p>3 – Plans co-designed with the local community to support and benefit them and the destination longer-term</p> <p>6 – Collaboration with businesses that are certified as sustainable and responsible e.g. Eco Certification Program</p> <p>10 – Plans to increase employment, preserve culture and including measures to minimise the impact on the local environment/climate change i.e. visitor payback, environmental impact assessment, tourism impact assessment, climate change adaption strategies etc.</p>
Basic score (sum of all scores above)		250	



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