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CANADIAN QUAD COUNCIL CONSEIL CANADIEN DU QUAD

CANADA'S NATIONAL POWERSPORT TRAILS REPORT

A LOOK AT POWERSPORT TRAILS AND ORGANIZATIONS IN CANADA

SUMMARY

Canada's off-highway ATV, side-by-side, and motorcycle trails represent a vital aspect of our nation's outdoor recreational landscape and culture. These trails, spanning diverse terrains from rugged mountains to dense forests, offer enthusiasts unparalleled opportunities for adventure and exploration like no other in the world.

However, the current state of these trails reflects a complex interplay of factors, that put our trails at risk including environmental sustainability, park expansion, trail maintenance, and regulatory frameworks. This report aims to provide a comprehensive overview of the condition, usage trends, and future prospects of Canada's off-highway powersports trails, highlighting both the challenges and opportunities that lie ahead.

Note: Snowmobiles and related organizations are an important part of the overall powersport landscape but are not included in this report.

ECONOMIC IMPACT OF THE POWERSPORT TRAIL INDUSTRY IN CANADA

Total economic impact of the powersport trail industry (2022) [1]:
$10,3 B

Vehicle Sales (2024)[2]:	$7B
Tourism spend (2022):	$4.2B
Sales & Other spend (2022):	$5.4B
Taxes	$2B

184K volunteer hours

$5.5 million
in volunteer labour cost

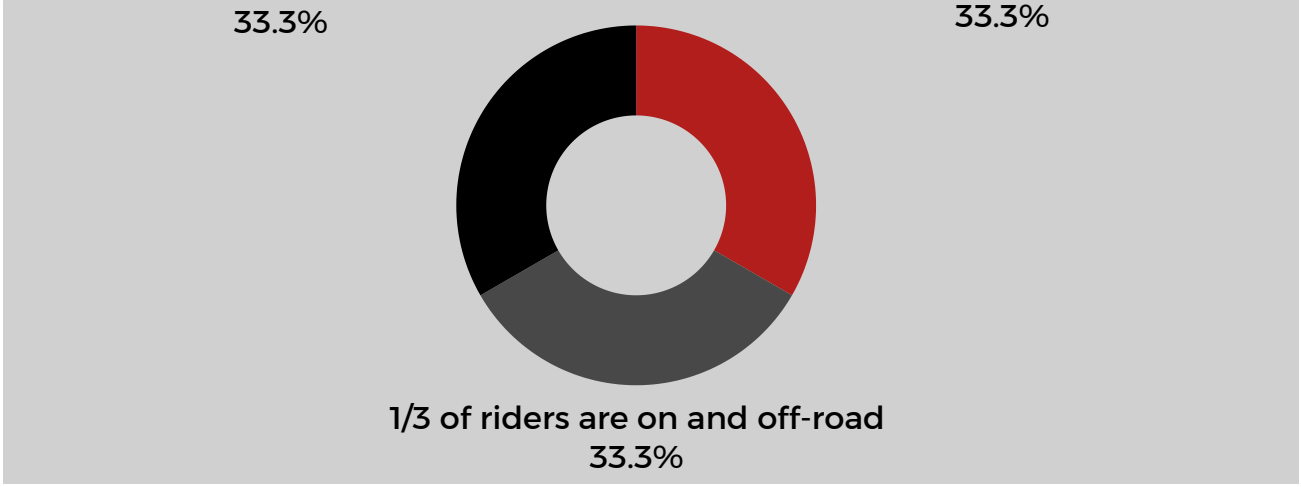
$24 million
in available infrastructure projects

$200 Cost per KM

1.2m off-road vehicles in Canada (2022)[3]

$6.3 million
in spending by trail organizations

At least **142,400 km** of trail
Over **663,300** registered trail users



[1] Moto Canada, CQC, MCC. Economic Impact Study of On-road Motorcycles and Off-highway Vehicle Recreation in Canada.https://motocanada.com/wp-content/uploads/2024/04/motoCanada-MCC-CQC-economicImpactStudy-10.19.23.pdf. October, 2023.

[2] Moto Canada. Moto Canada Retail Sales Statistics, 2024.

[3] Moto Canada, CQC, MCC. Economic Impact Study of On-road Motorcycles and Off-highway Vehicle Recreation in Canada.https://motocanada.com/wp-content/uploads/2024/04/motoCanada-MCC-CQC-economicImpactStudy-10.19.23.pdf. October, 2023.

[4] Moto Canada, Clerica Research, 03/2024.

KILOMETRES OF MANAGED POWERSPORT TRAILS IN CANADA

Province	KMS of Managed Trail
BC	8,300
AB	3,650
SK	1,800
MB	1,650
ON	10,950
QC	21,500
NB	6,700
NS	3,220
PEI	450
NFLD	880
TOTAL KMS	59,100

In addition to the 59,100 kilometres of trail which organizations in Canada actively manage, the trail organizations surveyed identified another 83,300 kilometres of Crown or public lands that they have access to and share.

PURPOSE OF THIS REPORT

INSIGHT AND ANALYSIS

The purpose of Canada's National Powersport Trails Report 2025 is to provide a detailed and insightful analysis of the current state of off-highway ATV, side-by-side, and motorcycle trails across the country. This report aims to:

- Assess the extent of managed and non-managed trails summarizing the number of kilometres available to riders
- Evaluate provincial trail organizations and their operational viability
- Identify threats and risks to the future of Canada's trail network
- Summarize the labour force and volunteers in this network
- Evaluate the economic impact of the industry

By addressing these key areas, the report seeks to inform policymakers, trail managers, and the powersport community, fostering a collaborative approach to maintaining and improving Canada's trail systems for future generations.

REPORT PARTICIPANTS

MOTO CANADA

Moto Canada is the nation's leading industry association representing the interests of the world's best powersports brands — including Arctic Cat, Argo, Aprilia, BMW Motorrad, BRP, Can-AM, Ducati, GasGas, Harley-Davidson, Honda, Husqvarna, Indian Motorcycles, Kawasaki, KTM, MV Agusta, Moto Guzzi, Piaggio, Polaris, Royal Enfield, Suzuki, Triumph, Vespa, and Yamaha. Moto Canada is a driving force, uniting Canadians with the exhilarating world of powersports and as industry advocates, we champion Canadians' ability to ride both on and off-road. Moto Canada members represent over 90% of the powersports industry in Canada, generating $17.3 billion in economic activity and over 88,000 Canadian jobs.

THE CANADIAN QUAD COUNCIL

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As the national voice of Canada's ATV & ROV community, the CQC serves as an educational and policy resource, providing valuable insights and guidelines for its members, federal governing bodies, and the general public, all aimed at promoting safe and responsible riding.

The council's mandate goes beyond advocacy. It catalyzes collaboration and knowledge exchange among member federations and associations nationwide.

The CQC strives to cultivate a supportive ecosystem that fosters the growth and development of robust rider federations by facilitating knowledge transfer, sharing best practices, and implementing targeted programming. Additionally, the council plays a crucial role in amplifying the collective voice of its members, channelling advocacy efforts toward impactful outcomes that resonate across the nation's ATV and ROV communities.

CANADA'S POWERSPORT TRAIL ORGANIZATIONS

Moto Canada and CQC would like to sincerely thank the following organizations for their participation in this study. Without them, their volunteers and their dedication, Canadians would have no trails to ride.

- **Alberta Off Highway Vehicle Association**
- **ATV Manitoba**
- **BC Coalition of Motorcyclists**
- **BC Off-Road Motorcycle Association**
- **Federation du Motorcyclists du Quebec**
- **Federation Quebecoise des Clubs Quad**
- **Federation Quebecoise des motos hors route**
- **New Brunswick Off Road Riders Assn**
- **Newfoundland T'Railway Council / Avalon Trailway**
- **Nova Scotia ATV Federation**
- **Nova Scotia Off Road Riders Association**
- **Ontario Federation of All Terrain Vehicles**
- **Ontario Federation of Trail Riders**
- **PEI ATV Federation**
- **Quad Riders Association of BC (ATVBC)**
- **QuadNB**
- **Saskatchewan All Terrain Vehicle Association**

WHY TRAILS MATTER

Canada's trails are deeply linked with the nation's development and cultural heritage. With the arrival of the first indigenous people, trails were established centuries ago. Later European explorers, fur traders, and settlers used these routes for travel and trade. As Canada evolved, the advent of automobiles and road networks led to a decline in trail usage.

Yet, the land continued to call us as we became a more urbanized population and in the mid-20th century, there was a resurgence in interest in trails, driven by recreational needs and conservation efforts. With the decline of rail, new opportunities for trails became important and recreational and urban planners began to involve trails in their future plans as trail vehicles were developed.

Today, Canada boasts an extensive and diverse trail system with over 142,400 kilometres that connect Canadians from to coast to coast to coast. Driven largely by volunteers and passionate users, trails generate $10.3 billion in economic activity [4]. and have become vital for tourism, local economies, and recreation, reflecting their enduring importance in Canadian society.

TRAILS AND USERS

While mixed-use trails are gaining popularity, trail users in Canada can be broadly categorized into two groups: non-motorized and motorized, or powersport, each with distinct characteristics, infrastructure, needs and preferences.

Non-motorized trail users include hikers, cyclists, runners, and horseback riders. These individuals typically seek trails that offer scenic beauty, tranquility, and a connection to nature. Non-motorized trails are often found in national parks, conservation areas, and urban green spaces, providing opportunities for physical exercise, wildlife observation, and relaxation.

[4]. Moto Canada, CQC, MCC. Economic Impact Study of On-road Motorcycles and Off-highway Vehicle Recreation inCanada.https://motocanada.com/wp-content/uploads/2024/04/motoCanada-MCC-CQC-economicImpactStudy-10.19.23.pdf. October,2023.

Powersport trail users encompass ATV riders, side-by-side drivers, motorcycle enthusiasts and snowmobile riders. These users are drawn to trails that often offer challenging terrains, technical riding experiences, and the thrill of travelling in or on a vehicle. Powersport trails are commonly located in rural and remote areas, including forests, mountains, and designated off-highway vehicle parks but also existing urban settings. These trails often require more maintenance and regulatory oversight to ensure safety and environmental sustainability.

Powered or not both groups contribute to the vibrant outdoor recreation culture in Canada, highlighting the need for diverse trail systems that cater to varying interests and activities.

METHODOLOGY

This survey was conducted in the spring of 2025 by Moto Canada and the Canadian Quad Council.

Participant organizations included provincial off-road ATV/ROV organizations and provincial off-road motorcycle organizations. The term “powersport trail” refers to ATV, ROV and motorcycle trails only and does not include snowmobile trails. Other published and unpublished data from Moto Canada’s archives have been used in this study to add context. Publicly available trail data from the Eastern Ontario Trail Alliance, Kawartha ATV Association and Haliburton ATV Association has been included in the Ontario managed trail data numbers and the overall national trail data.

TRAIL VEHICLES

ATV
All-Terrain Vehicle

It features a straddled seat and steering handlebars. The vehicle is designed for both recreational and work-related use, such as on a farm. It is intended to carry a driver and up to one passenger.

ROV/UTV/SXS
Recreational Off-Highway Vehicle or Utility Terrain Vehicle or Side by Side

Each vehicle includes a seat for every passenger. Models range from single-rider versions to those designed to accommodate a driver and up to five passengers. They are equipped with a steering wheel, similar to that of an automobile. Manufacturer-installed seatbelts are provided for safety. Roll-over protection (ROP) systems are designed and installed by the manufacturer.

ORM
Off-Road Motorcycle

Lightweight, motocross-style motorcycle designed for off-road use on rough terrain. It features a straddled seat and is controlled using steering handlebars.

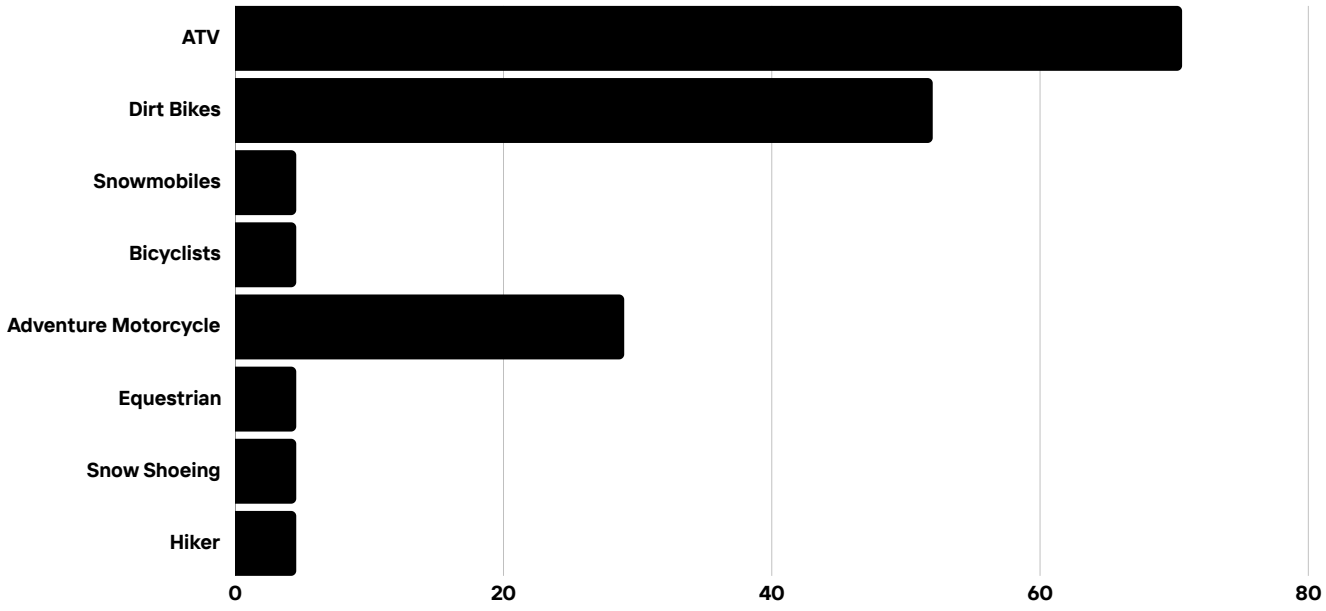
ADV/Dual Sport
On-Road & Off-Road Motorcycle

This is a lightweight, motocross-style motorcycle designed for off-road use on rough terrain. It features a straddled seat and is controlled using steering handlebars.

SURVEY FINDINGS
USER GROUPS

WHAT ACTIVITIES TAKE PLACE ON YOUR TRAILS?

Many powersport trails are shared trails, meaning they're used by a variety of groups of people who all share the same passion for Canada's outdoors. The following section outlines the variety of users on powersport trails in Canada.



Motorized trail use is mixed across Canada, with 70% of the trails dedicated to ATV/SXS use, 52% allowing dirt bikes, 29% allowing adventure bikes, 5% shared with snowmobiles, horse riders, cyclists, snowshoers, and hikers.

HOW MANY PEOPLE USE YOUR TRAILS EACH YEAR?

The total number of motorized trail users in Canada is approximately 663,300

STAFF AND VOLUNTEERS

People are the lifeblood of any organization and Canada's trail organizations are no different.

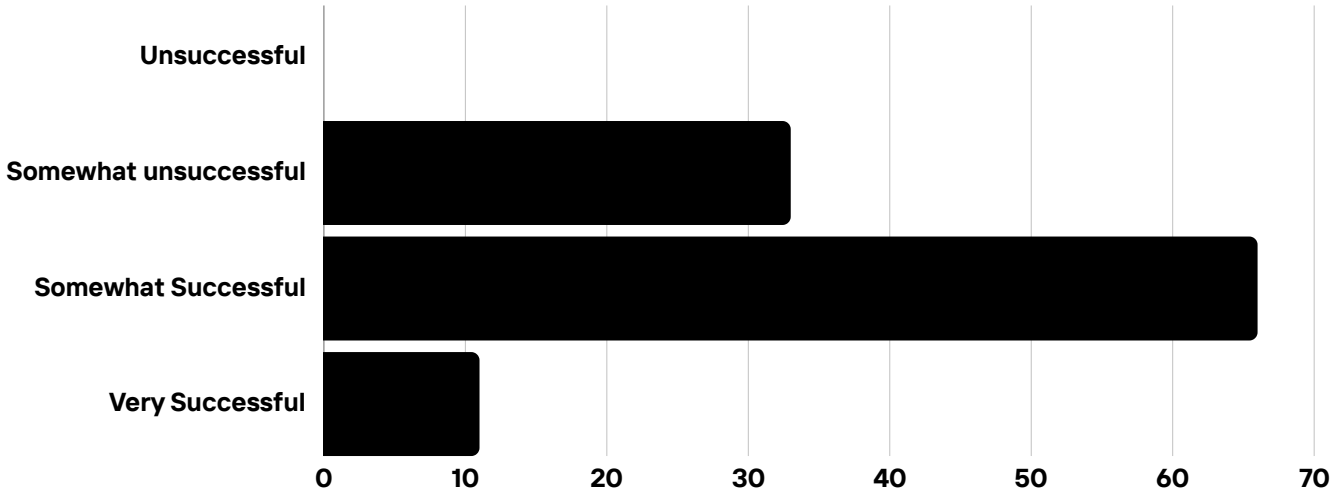
DOES YOUR ORGANIZATION HAVE DEDICATED PAID STAFF OR VOLUNTEERS?

Of the fifteen organisations surveyed, there are a total of 26 paid full time staff and 6 part time staff.

HOW MANY VOLUNTEER HOURS DOES YOUR ORGANIZATION BENEFIT FROM EACH YEAR?

Total volunteer hours: 184,100
Average volunteer hours per organization: 12,273
Approximate Value @ $30.00 per hour: $5.5 million

HOW WOULD YOU DESCRIBE YOUR ABILITY TO RECRUIT VOLUNTEERS?



The ability to recruit volunteers is generally successful, with 66% of respondents finding volunteer recruitment successful and 33% finding their efforts somewhat unsuccessful.

WHAT MAIN ACTIVITIES OR ROLES THAT VOLUNTEERS SUPPORT?

Activity	Membership	Admin	Events	Advocacy	Safety	Trail work	Fundraising
Rank	1	2	2	4	5	6	7

Volunteers spend the most time on membership recruitment and retention, with administration and events being the next most active areas for volunteers. Advocacy remains a critical function of volunteers, with safety and training, trail work and fundraising the least active areas for volunteers.

WHAT CHALLENGES DOES YOUR ORGANIZATION FACE IN RECRUITING OR RETAINING VOLUNTEERS?

1. Lack of interest or awareness in volunteering opportunities
2. Competition with other organizations for volunteers
3. Lack of resources to support or train volunteers
4. Time constraints of volunteers

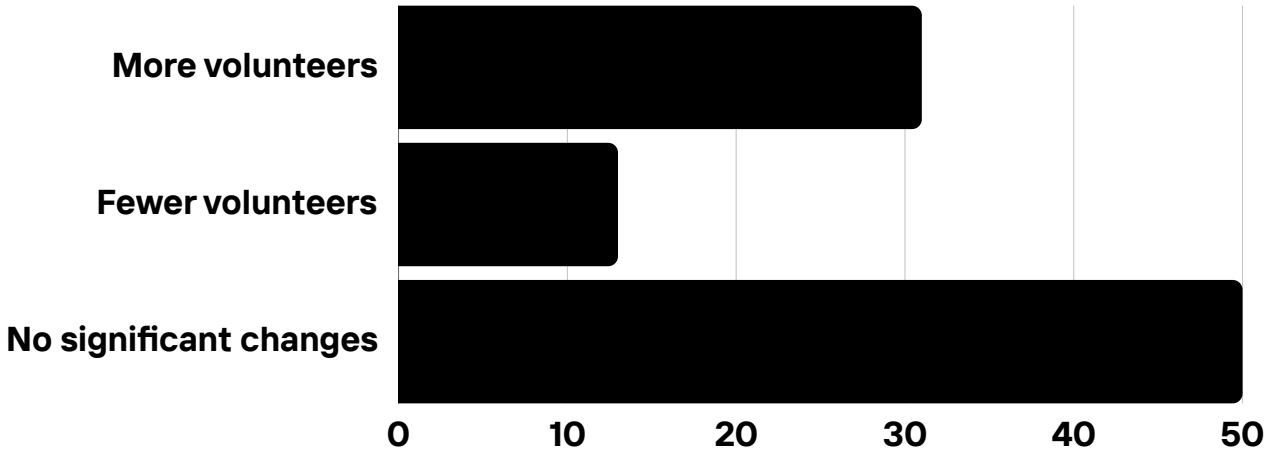
HOW DO YOU PLAN TO IMPROVE VOLUNTEER RECRUITMENT OR RETENTION?

Respondents indicated that they wish to improve volunteer recruitment and retention through a variety of means including:

- Developing volunteer incentives and perks
- Improved recruitment campaigns using events, community outreach and social media targeted at younger users
- Asking riders to donate 10% of ride time towards the organization
- Increasing the organization's brand and visibility
- Developing a mentoring program
- Provide an award and gratitude program

Many respondents also noted that the regulatory requirements of government and insurance companies is making it more difficult to allow volunteers to participate due to the burden of certification and administration.

DO YOU ANTICIPATE CHANGES IN THE VOLUNTEER WORKFORCE IN THE NEXT TWO YEARS?



When asked about changes in the volunteer workforce over the next 2 years, 50% of respondents indicated that there would be no change. 31% expect they will have more volunteers, while 13% expect volunteer rates to decline.

FINANCIAL HEALTH OF PROVINCIONAL ORGANIZATIONS

WHAT IS YOUR ORGANIZATION'S APPROXIMATE ANNUAL BUDGET?

Total national budget for trail organizations: $6,325,000
Average budget per organization: $395,313
Total National Budget + Value of Volunteer Hours = $11,825,000
This equates to a cost per trail of: **$200** per kilometre of trail

In 2025, the total budget spent on powersport trails in Canada is $6.325 million. On average, each provincial organization has a budget of $395k. Six of the organizations had a budget of $500k or less, five were between $500k and $750k and four were above $750k. On average, ATV/ROV, dirt bike and adventure bike trails are costing $200 per km.

WHAT ARE YOUR ORGANIZATIONS MOST IMPORTANT SOURCES OF REVENUE?

1.Grants
2.Membership Fees
3.Sponsorships
4.Trail Users
5.Donations
6.Partnerships
7.Other

Respondents indicated that most of their revenue comes from grants, with membership fees a close second. Sponsorships and non-member trail user fees are an essential source of revenue, while donations, partnerships and other revenue make up the balance.

IF YOUR ORGANIZATION HAD FUNDING TO SPEND ON INFRASTRUCTURE IN THE NEXT 24 MONTHS WHAT IS THE ESTIMATED AMOUNT YOU WOULD NEED TO COMPLETE THE PROJECTS?

$24,370,150

Trail organizations estimate that there are over $24 million in infrastructure projects that could be completed across Canada within the next two years.

STATUS OF TRAILS

APPROXIMATELY HOW MANY KILOMETRES OF YOUR TRAILS ARE ORGANIZED AND COVERED BY LAND USE AGREEMENTS OR INSURANCE ?

59,100 km

Over 59,100 kilometres of powersport trails in Canada are actively managed and are covered by access agreements or insurance.

HOW MANY KILOMETRES OF TRAILS IN CANADA DON'T REQUIRE LAND USE AGREEMENTS?

82,300 km

Respondents identified at least 82,300 kilometres of powersport trails that don't require a land use agreement in Canada. Much of this is Crown land, and many kilometres of Crown land don't require a land use agreement.

All told, there are well over 142,400 km of non-snowmobile powersport trails in Canada.

WHAT THREATS OR OPPORTUNITIES DO UNORGANIZED TRAILS FACE?

Unorganized trails are a significant part of the powersport trail mix in Canada. These trails are a mix of Crown Land and land managed by forestry companies and other landowners. Respondents indicated the following opportunities and threats related to unorganized trails:

Threats

- When Crown land becomes organized, other users may push to restricting use
- Users on unorganized trails decline to invest in trail improvements, safety measures , and enforcement
- In some areas, Crown land managers and other users seek to restrict access of powersport vehicles to Crown land
- Unorganized trails offer a greater risk to riders since they are not usually maintained to the same standard as organized trails
- Forestry companies are beginning to deactivate some of these unorganized forestry roads to limit liability and maintenance costs

Opportunities

- There are opportunities to make some of these trails organized trails
- Some clubs seek and gain permission to invest in trail improvements for these areas to keep them open and safe
- Investment usually results in environmental sustainability and improved conservation

DOES YOUR ORGANIZATION PLAN TO MANAGE MORE OF THESE UNORGANIZED TRAILS?

About half of the respondent organizations are actively involved in, or working towards managing more unorganized trails.

RANK THE RISKS TO YOUR ORGANIZATION'S FUTURE.

1. Loss of access to land
2. Lack of funding
3. Government Bureaucracy
4. Insurance & Risk Mgmt
5. Trail Maintenance
6. Insufficient Human Resources
7. Mapping
8. Promotion & Mktg
9. Fewer Users

When it comes to risks to the organization's future, the loss of access to land was the number one risk. Lack of funding and government regulation were the following two significant issues. The remaining issues, while important, did not consistently rank high among the respondent organizations.

RANK THE EXTERNAL FORCES THAT THREATEN THE VIABILITY OF YOUR TRAILS FROM THE BIGGEST THREATS TO THE LEAST THREAT.

1. Government regulation and over-management
2. Environmental activists
3. Unsafe rider behaviour
4. Other users
5. Private landowners
6. Poor communications with stakeholders
7. Development

When asked about external forces that threaten the viability of trails and organizations, the first three threats —government regulations, environmental activists, and unsafe rider behaviour — were consistently among the top three issues respondents face. Other issues remain a threat in different degrees through different jurisdictions.

HOW DO LOCAL POWERSPORT DEALERS SUPPORT YOUR LOCAL TRAIL ORGANIZATION?

1. Marketing
2. Equipment
3. Program Support
4. Volunteers
5. Funding

HOW COULD STAKEHOLDERS BETTER SUPPORT YOUR TRAILS?

1. Funding
2. Trail Safety & Training
3. Program Support
4. Marketing
5. Trail Enforcement
6. Land Use Agreements
7. Governance
8. Equipment
9. Volunteers

When asked about how external stakeholders could support the respondent's trail network, the following answers received the most responses: trail funding, trail safety and training. Funding would be targeted at administration costs, marketing and program support, while the promotion of safety with users and in the community in addition to materials for distribution to users, would be valuable to many organizations.

HOW COULD STAKEHOLDERS BETTER SUPPORT YOUR ORGANIZATION?

1.All stakeholders must have a common desire to improve and manage trails for all user groups.

2.Advocacy, especially with Conservation Zones and First Nations co-management of Public Lands, is our highest need. We need sustainable resources to hire and retain professionals to lobby on behalf of our evolving sport. What we do is ecologically sustainable, healthy and essential for both rural and urban fringe communities economically.

3.We need to improve the promotion of off-road motorcycling. Concerted, promotional, and advocacy activities would be beneficial.

4.Ensuring organizations have a voice within the motorized community would be helpful.

5.Help with funding and cost-share projects for safety programs since return on investment is difficult for safety programs. Nevertheless, we know the program is essential and we need to be consistent with safety messaging.

6.Lack of enforcement has been a significant challenge. Enforcing current regulations and ensuring more accountability of riders will protect current and future riding opportunities.

7.Funding from all levels of government for major infrastructure projects is drastically required.

8.We would like to see stakeholders assist us with forming clubs. This would help us increase our membership and expand our ride areas.

9.Funding is always key. Our goal is to grow the sport by developing safe, legal, and sustainable trails. Ultimately, this benefits all stakeholders.

10.Funding for managing exceptional circumstances, such as ice storms or loss of access, would be helpful.

11.Create a trail working group to share ideas and collaborate.

12.Develop a provincial/recreational trail strategy.

13.Be recognized as the most significant economic trail contributor in the country.

14.Train the staff and directors on the relevant laws, local clubs and governance required to run an organization.

CONCLUSION

Canada has a rich and diverse system of powersport trails that reach all parts of the country over 142,400 kilometres.

This network benefits from $11.8 billion in spending and generates over $10.3 billion in economic benefit. The network is almost entirely supported by volunteers and is funded by grants and user fees. There is no federal support for these trails.

Loss of access to land, lack of funding, government regulation and environmental activism are the most significant risks to the network.

Canadians have something very valuable in their powersport trail network and should work to collectively manage it for decades to come.

FOR MORE INFORMATION

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