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# PACIFIC MARINE CIRCLE ROUTE

## Gap Analysis Study

October, 2011

*Conducted by:*

***Masters In Sustainable Leisure Management Program***



**VANCOUVER ISLAND**  
**U N I V E R S I T Y**

# PACIFIC MARINE CIRCLE ROUTE: GAP ANALYSIS STUDY

October 2011

This research was conducted by graduate students in the Masters in Sustainable Leisure Management at Vancouver Island University in October 2011, led by Dr. Nicole L. Vaugeois. The study is intended to provide stakeholders involved with the promotion and protection of the routes amenities with additional insights.

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## EXECUTIVE SUMMARY

As prevalent as tourism routes are throughout the world, there are gaps in our understanding about how they should be developed, promoted and sustained as a tourism product (Hardy, 2003). There are additional questions about the extent to which knowledge gained from the few existing studies is currently used in practice. Without a grounded understanding of route tourism, we may miss opportunities to capitalize on strengths, provide positive experiences to visitors, and reap the full benefits of their development. This report synthesizes research on route tourism and uses it to assess the current status of the Pacific Marine Circle Route on southern Vancouver Island, BC. The research highlights gaps in the existing route that could be addressed to enhance the overall visitor experience and evolve as a significant regional tourism asset.

The purpose of this study was to develop a case study that: a) identifies the natural, cultural and system amenities along the Pacific Marine Circle route which have value for local residents and visitors, b) to assess the current quality of the tour experience as delivered by the range of stakeholders and communities involved, and c) to analyze the extent of engagement and regional collaboration on the delivery of the circle route. The team developed a modified gap analysis tool to compare a) the way that the route is being promoted to visitors vs. the actual experience of the research team, and b) the factors for successful route development based on other case studies with the current strategies being used by stakeholders on the PMCR. The study was conducted by a team of 11 researchers in October 2011 through a week of intense fieldwork, discussions with stakeholders, observations and the analysis of secondary documents such as promotional materials, websites, and regional plans.

Currently the PMCR is being promoted by a number of organizations with no one official conduit recognized as the authority. As such, there are a variety of inconsistent messages being communicated to visitors. Synthesized, the experience is being promoted as:

- An opportunity to see large trees;
- An opportunity to access world class parks and trail systems;
- An opportunity to have great views of the ocean and to access beaches;
- An opportunity to experience diverse local cultures and eat local foods;
- An accessible, relaxing, easy to drive in a day, route largely originating from Victoria.

Based upon the experience of the research team, there are some observable gaps in the expected and actual experience on the route. The amenities on route that are ready for visitation are mostly natural amenities such as forests, large trees and beaches. Water views and access however, are not as abundant as expected, or they are difficult to locate. The cultural amenities, while abundant in the region, are not currently the focus of promotional efforts, but they may be useful to consider when developing a strong theme for the route.

Based on the observations of the study team and understandings of relevant literature, the research team has identified factors of success for circle route development. **The Pacific Marine Circle Route largest gaps appear to be in the promotion of a consistent and clear message and safety.** Along with this, many possible themes have been identified from organizations within communities, but consensus has not been reached on what that theme (or themes) will be. While individual regions have conducted market research and understand their visitors, there is no clearly defined target markets identified for the route. There is a **need to initiate market research in the region on the current users** of the PMCR to understand the nature of the experience. This will help in form strategic planning and the identification and targeting of specific markets for the route.

While there is an incomplete understanding in the region about the early origins of the route, recent grassroots initiatives to identify stakeholders and collaborate are emerging. This is a positive evolution as research has shown that a ground-up approach is a key factor in the success of circle routes. As this group evolves, **there is evidence of the need for a unified voice for the route** which may indicate the need for a governance model to emerge. The route is not just a set of signs and map for visitors, and as such, it there is work to be done to develop a strategy for the route. This process, if done with ample buy in from diverse stakeholders, will help clarify the route and obtain buy in for its future development. As outlined in the literature, this strategy should be guided by a set of principles, lead by a credible entity and build in a process to measure success along the way. There should be additional efforts to **expand the traditional tourism stakeholder groups** (marketing organizations and businesses) to engage in dialogue with residents of the communities on route. The decision to be or not to be part of the route was not something that was afforded to communities in the decision making process. There appears to be some resistance among certain communities on route, therefore **concerns should be heard and the ability to opt out of being promoted as a stop on route should be explored.** While there is resistance to the circle route from some communities, there is a lack of awareness about the route among others. **Efforts to raise awareness about the route and the impacts associated to its development should be done;** otherwise operators will not be able to deliver on the experiences being promoted. The circle route is in its infancy. Slow progression in the evolution of the PMCR will allow for resident buy-in to occur at various stages throughout.

Safety is an issue that is being discussed within a number of communities on the PMCR, and the attention given to this issue will have consequences for both residents and visitors to the area. Tied to safety is the need for clear signage and definition of the route so users can be confident in their travels throughout the region. The route is being promoted as a relaxing trip that is possible in one day. **This should be questioned, and according to the research team, changed.** The trip is not relaxing due to the nature of the roads on route, and we would question why anyone would want to promote a trip that does not include an overnight in one of the rural communities on route. If it is a diversification strategy, then money from visitors will need to be spent along the route on accommodations and food. Slowing people down to take advantage of the various sites will allow this to occur.

## INTRODUCTION

As prevalent as tourism routes are throughout the world, there are gaps in our understanding about how they should be developed, promoted and sustained as a tourism product (Hardy, 2003). There are additional questions about the extent to which knowledge gained from the few existing studies is currently used in practice. Without a grounded understanding of route tourism, we may miss opportunities to capitalize on strengths, provide positive experiences to visitors, and reap the full benefits of their development. This report synthesizes research on route tourism and uses it to assess the current status of the Pacific Marine Circle Route on southern Vancouver Island, BC. The research highlights gaps in the existing route that could be addressed to enhance the overall visitor experience and evolve as a significant regional tourism asset.

Rural regions face a number of challenges for sustainable development due to their remoteness and scale (Stolaric et al, 2010). In general across Canada, rural areas that are in close proximity to major city centers have been growing whereas population has been declining in more remote areas (Statistics Canada, 2011). This trend has been influenced the presence of other realities such as “declining economic activity, restructuring of the agricultural sector, dwindling rural industrialization and out-migration of higher educated youth” (Briedenhann & Wickens, 2004, p. 71).

Route tourism is often used as a strategy to link rural communities and their natural and cultural amenities together to add to the attractiveness of the region and link products and services together for the ease of visitors.

To regenerate rural regions, some communities have attempted to incorporate tourism into their local economy as a strategy for economic and social development (Briedenhann & Wickens, 2004; Stolarick et al, 2010). While this strategy has proven effective in other regions of the world (Moscardo, 2008), the incorporation of tourism into rural diversification efforts is fraught with challenges such as inadequate infrastructure, limited human and social capital. In the effort to develop tourism, communities often act on their own vs. using a regional approach and as such, often lack the ability to attract visitors from urban markets or other origins. Route tourism is often used as a strategy to link rural communities and their natural and cultural amenities together to add to the attractiveness of the region and link products and services together for the ease of visitors.

In the past decade, there has been a significant increase in themed touring routes (Briedenhann & Wickens, 2004; Hardy, 2003; Lourens, 2007 Meyer, 2004). “Tourism themed routes are a mix of marketing and development initiatives that create corridor-style drive experiences for the drive market” (Olsen, 2003, p. 334). Drive tourism is tourism in which individuals travel by personal vehicle and experience a series of product markets (Hardy, 2003). Themed routes utilize the drive market by portraying distinct experiences of state or national significance which are linked together by means of maps and literature and en-route information such as signs and visitor centers (Olsen, 2002 as cited in Hardy, 2003). Popular tourism routes include Route 66 in the USA, the Sea to Sky Highway in Canada, the Road to Hana in Maui, the Camino de Santiago in Spain and France, and the Midlands Meander in South Africa. As a diversification strategy, route tourism has proven effective in diversifying economic

gains in rural areas within the international context (Briedenhann & Wickens, 2004; Meyer, 2004; Lourens, 2007). The lessons learned from these destinations could assist Canadian rural areas to enhance tourism development.

#### TOURISM ROUTE DESIGN

So what are some of these lessons that have been learned elsewhere? Routes are developed by both the private and the public sectors “to increase the attractiveness of the area and the tourism product with the aim to generate income from tourism” (Meyer, 2004, p. 11). In developing a route, the **target market segment must be identified and understood** in order to properly design the route. In a number of destinations for example, retirees and baby boomers make up the largest segment of the drive tourism market and tend to travel as couples (Hardy, 2003). **Innovative product development, infrastructure and access are fundamental** elements that must embody the overall vision of the route (Meyer, 2004). In order for this to be properly achieved, **a regional development approach with a strong leadership base is needed** to ensure a sustainable product (Lourens, 2007; Meyer, 2004).

“Tourism themed routes are a mix of marketing and development initiatives that create corridor-style drive experiences for the drive market”

Creating an **integrated visitor information network is vital** to the success of themed routes (Olsen, 2003). Tourism themed routes **rely on “cooperation between key agencies** to create an integrated information network in order to provide reassurance to the driver” (Olsen, 2003, p. 336). **Strong and continuous cooperation from transport authorities, map providers, industry along the route and all levels of government is needed** in order to properly deliver the product to the visitor (Olsen, 2003). The establishment of organized networks comprised of different service providers can maximize opportunities and diversify activities therefore allowing rural operators to manage tourism in terms of economies of scope (Briedenhann & Wickens, 2004).

Such organized networks need to recognize the **importance of pre-trip planning and the availability of information to the tourist** prior to embarking on the tourism route. In Queensland, Australia, it was found that 59 per cent of tourists plan the entire route prior to departure while the other 41 per cent plan at least part of the route (Yann Campbell Hoare Wheeler, 1999). During pre-trip planning, the **driver needs reassurance** that the themed route is a reliable alternative to the more heavily used primary routes (Olsen, 2003). Productive pre-trip planning can result in increased visitation to attractions, better time management, and an overall higher satisfaction with the route (Hardy, 2003).

Strong and continuous cooperation from transport authorities, map providers, industry along the route and all levels of government is needed in order to properly deliver the product to the visitor

Pre-trip planning information can also provide the visitor with important safety information, can promote frequent stops, and can encourage the visitor to explore areas off the beaten track such as side roads and more remote areas (Taylor Neslon Sofres, 2001 as cited in Olsen, 2003). Such information is

also important for developing tourist expectations and appreciation for the surrounding landscapes (Meyer, 2004). Therefore, the availability of information accessible through tourism guides and websites is incredibly important.

The information gained during the pre-trip planning reassures the visitor of the reliability of the route; however, this **information must be consistent en-route** to maintain visitor reassurance (Olsen, 2003). During the en-route experience, drivers need reassurance through safe and reliable information such as road signs and accessible visitor information that “encourage frequent stops, increased expenditure and improved experiences” (Olsen, 2003, p. 337). In Queensland, Australia the importance of “locally branded” information was apparent through tourists’ desire to seek suggestions from local residents as well as visitor information centers (Yann Campbell Hoare Wheeler, 1999). Visitor information centers can function as places of pride that can link visitors with the destination community and play a role in bringing together traditional and emerging businesses (Meyer, 2004).

#### KEYS TO SUCCESS

In order for a tourism route to be successful, cooperation throughout networks, a regional approach, guided leadership, community participation, availability of information and promotional materials, and the development of products, infrastructure and access are key indicators for success (Meyer, 2004; Olsen, 2003; Lourens, 2007). Hardy (2003) suggests a list of 10 ‘Ps’ of Successful Driving Routes which is consistent with suggestions from other literature:

During the en-route experience, drivers need reassurance through safe and reliable information such as road signs and accessible visitor information that “encourage frequent stops, increased expenditure and improved experiences”

1. Place: The destinations need to be appealing to tourists and have a strong theme that represents the quality of the area). Proximity or connection to a main highway and other transportation services such as airports will help ensure the success of the route. It is also important to incorporate and establish the route with tourist gateways, staging areas and clustered attractions (Meyer, 2004). Clustering provides benefits such as opportunities for development planning, design and environmental control; the provision and access to transportation and other infrastructure; the convenient placement of facilities in close proximity for tourists; concentrated development which supports a variety of facilities and services; and the containment any negative impacts to specific areas (Meyer, 2004).
2. Product: Visitor satisfaction with the activities and attractions. Fundamental to the attractiveness of themed routes are the premise of reassurance and reliability which rely on set minimum standards, comprehensive planning and coordination (Olsen, 2003).
3. Promotion: In order to effectively promote the tourism route, it is very important to know and understand the key market segments (Hardy, 2003). Branding and imaging of the route is also imperative to its success (Meyer, 2004; Lourens, 2007).
4. Active stakeholder engagement and cooperation is vital to the success of a tourism route (Hardy, 2003). Cooperation of a broader scope of participants such as map providers, transportation companies, all levels of government, local communities, tourism operators and



agencies, and department of transport is needed (Briedenhann & Wickens, 2004; Lourens, 2007; Meyer, 2004; Olsen, 2003). Providing this cooperation of stakeholders, themed routes have the potential to move beyond a tourism promotional tool to an effective road-use-management tool (Olsen, 2003). The formation of strategic alliances amongst operators is incredibly important in order to be successful (Meyer, 2004; Tefler, 2001). This can be accomplished through councils, associations, festivals, advertising, and informal word of mouth promotion of competitors (Tefler, 2001).

5. Paraphernalia: Developing strong marketing information such as websites, maps, and tourist guides is incredibly important to provide visitors with plenty of information during their pre-trip planning (Hardy, 2003).
6. Path: The route to follow needs to be made very clear to visitors through the effective use of signs and other en-route information (Hardy, 2003).
7. Presentation: The tourism route needs to be consistently presented and marketed as a whole product (Hardy, 2003). This should include on-going market research, audit of tourism products and amenities, identification of the unique selling features, determination of the size of the membership base, a clear brand identity, proper planning including day-to-day and long term organizational and financial planning (Lourens, 2007).
8. Principles of Interpretation: Logos, signs, and other information available to the visitor in both the pre-trip planning and en-route stages needs to be consistent and should be enjoyable, relevant, organized, and thematic (Hardy, 2003). "Clustering of activities and attractions, the erection of user-friendly signage, the establishment of easily accessible information offices, and the development of rural tourism routes" (Briedenhann & Wickens, 2004, p. 72) are important factors which contribute to increased entrepreneurial opportunity and development of services and activities in rural areas.
9. Price: The costs of the tourism route needs to be effective for both the hosts and the guests (Hardy, 2003).
10. Protection: Main attractors to tourism routes tend to be natural and cultural heritage and therefore the protection of such amenities is paramount (Hardy, 2003).

These ten factors were gleaned from two case studies - the Cascade Loop and the Great Texas Coastal Birding Trail (GTBT). The Cascade Loop followed a bottom-up model and the GTBT utilized a top-down approach - both are examples of successful driving routes. The other studies reviewed were: *Tourism themed routes: A Queensland perspective*, Olsen (2003); *Strategic alliances along the Niagara wine route*, Telfer (1999); and South Africa. In a recent study of route tourism in Canada by Moi (2010), four additional principles have been posed to guide route development. 1) pride in the route and sharing the story instilled in each community, 2) political will and support for each stage of the route and long term sustainability, 3) plan to measure, report and communicate, and 4) perseverance and long term dedication by stakeholders and the wider community.

## COSTS AND BENEFITS OF TOURISM ROUTES

Well designed routes have many benefits including the disbursement of economic benefits throughout a region, providing additional employment and income, expanding tourist markets and increasing length of stay (Meyer, 2004). Themed routes can also help increase road network efficiency and road safety by leading visitors off the primary roads during heavy traffic periods (Hardy, 2003; Olsen, 2003). In addition, visitors are more easily managed as the routes generally attract relatively small numbers of people at any given time (Hardy, 2003).

There are also challenges to developing a successful tourism route. On the demand side, visitors seek consistency of delivery throughout the themed route but also beyond to other routes in the region which can be difficult for tourism providers to accomplish (Olsen, 2003). Another complication is the unpredictability of self-drive tourists' itineraries (Hardy, 2003). Further, as a result of numerous small vehicles on the road there is an environmental cost associated with tourism routes (Hardy, 2003).

Challenges for the supply side include a limited understanding of the tourism industry in many rural areas which can limit tourism growth potential (Meyer, 2004). Operators and other stakeholders need to understand that **tourism routes can take 20-30 years to mature** before they become economically viable (Lourens, 2007). Additionally, proper infrastructure needs must be in place in order to effectively operate a tourism route (Hardy, 2003).

Throughout the literature it is evident that cooperation within the regions of the tourism route is crucial to offering a successful tourism product. Knowing and understanding the segment market is also important to the ongoing success of the tourism route. It is therefore important that stakeholders wishing to participate in a tourism route understand the present situation. One approach to gaining such insight is through active fieldwork as in the case study developed for the stakeholders along the Pacific Marine Circle Route, British Columbia, Canada. The purpose of the fieldwork was to develop a case study that: a) identifies the natural, cultural and system amenities along the route which have value for local residents and visitors, b) to assess the current quality of the tour experience as delivered by the range of stakeholders and communities involved, c) to analyze the extent of engagement and regional collaboration on the delivery of the circle route, and d) to provide innovative ideas to assist in the future development of the strategy for rural diversification.

Operators and other stakeholders need to understand that **tourism routes can take 20-30 years to mature** before they become economically viable

## CASE STUDY CONTEXT

British Columbia is Canada's most western province and has the country's third largest population. Approximately 92% of British Columbia's land is considered rural which is using the Statistics Canada definition means a population under 10,000 people (StatsCan, 2009.) Despite the large rural area in BC, 85% of the population lives in urban centers (StatsCan, 2009). These rural areas have traditionally utilized primary resource extraction industries as the source of income for most rural populations. The Pacific Marine Circle Route is comprised mainly of rural towns that were mainly dependent on primary resource extraction industries.

When compared to the primary resource extraction industries in British Columbia<sup>1</sup>, tourism contributes significantly more to the overall GDP in British Columbia (Figure 1: Tourism BC, 2011). While all primary industries in BC have been declining since 2002, tourism has been the only one increasing steadily

<sup>1</sup> including forestry, agriculture and mining, oil and gas extraction

(Tourism BC, 2011). Because of the issues surrounding the continued reliance on resource extraction industries, rural communities have been pursuing new ventures to diversify their economies and maintain an employment base. The loss of jobs has led to greater incidence of poverty in rural areas, but also limited the opportunities available to young people to remain in rural areas. These people are now turning to larger urban centers to find employment (Markey, Halseth, Manson, 2008).

British Columbia is a province filled with natural and cultural amenities. Diverse in its culture BC has strong influence from its First Nations presence, and ever growing Asian population. Natural amenities such as snow covered peaks, rainforests and extremely diverse coastlines. Vancouver Island is the largest Island in British Columbia and is home to a very different experience and way of life than the rest of British Columbia. With access by air and ferry only, Vancouver Island feels very distant from the mainland, but is still close in proximity. With only two major city centers: Victoria (population 358 100) and Nanaimo (population 78 000) (Stats Canada, 2011). Vancouver Island is mostly made up with rural communities and natural wilderness. 41 First Nations are represented on Vancouver Island amounting to approximately 43 000 people (MCF, n.d). This strong First Nations influence is heightened by the Islands natural amenities. The island houses one of the world’s most diverse ecosystems: rainforests, marshes, meadows, beaches, mountains, rivers, lakes and the ocean. Both the cultural and natural amenities of Vancouver Island are best exemplified on the Pacific Marine Circle Route.

Due to a variety of factors such as the close proximity to Victoria and the attractiveness of the climate and amenities of the Southern Island region, the population in the region has been increasing. This phenomenon is called rural amenity migration and takes place when people move into rural communities for non-economic reasons (Kuentzel, Ramaswamy, 2005). This is an important source of opportunity for the rural communities within the region as a stable or growing population base is correlated to a decrease in poverty. Southern Vancouver Island is endowed with a number of natural and cultural amenities that make it attractive to visit, relocate and invest. This reality presents a strong opportunity for rural communities to create opportunities for stabilizing or growing their population base and for realizing new economic opportunities. There is a pattern to relocation decisions whereby people often visit a place first, form a positive impression and then see it as a place they’d like to live. Beyond viewing tourism as an industry that can bring new income to rural communities, regions could also benefit by expanding their view of the industry as a vehicle for exposure to outsiders with the intent to entice them in as new residents.

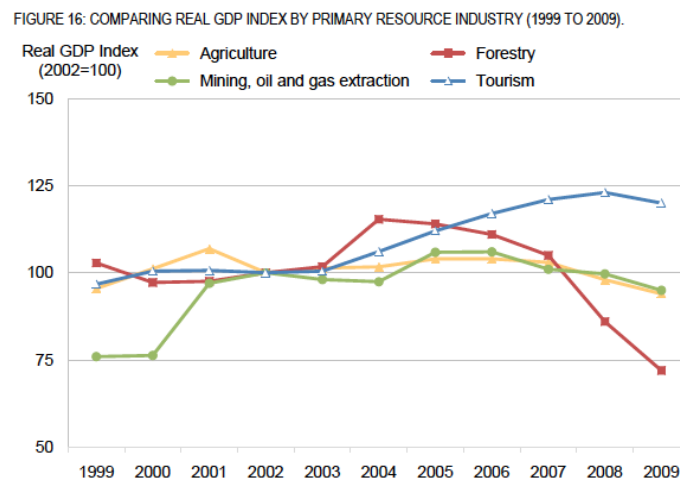


Figure 1: Comparing Real GDP Index by Primary Resource Industry 1999-2009: Source: Tourism BC

## PACIFIC MARINE CIRCLE ROUTE

Circle routes in British Columbia are currently overseen by the Ministry of Jobs, Tourism and Innovation. The Ministry works in collaboration with the Ministry of Transportation who provides and maintains signage on the routes. There are a total of nine official circle routes in British Columbia which connect many rural communities in BC. A criteria list, obtained from the Ministry of Transportation, is used to determine how circle routes are created in BC (figure 2). It includes: a) they must have a theme that would be appealing to tourists; b) the route must pass through various communities, c) must promote tourism, and d) have various amenities along the way.

Understanding the evolution of circle routes is important to determine the motivations, input, decision making and engagement of stakeholders. The research team attempted to locate the history and planning of the Pacific Marine Circle Route for this report, but was unable to obtain a complete understanding in the time provided. The study team found conflicting versions of their evolution in the Pacific Marine region. Some indicated that the decision was made at a provincial level and the signs “went up overnight” with limited engagement by community stakeholders, while others indicated that it was a grassroots initiative with provincial policy endorsement (and versions in between). At this point in time, the complete history of circle routes in British Columbia is currently unknown however efforts to document this evolution are important as they can assist stakeholders to evaluate process and enhance the route as it evolves and reaches maturity. If the route was established with little engagement of stakeholders, as some are suggesting, it will be important to future networks to invite broad engagement in the route’s future development to ensure that it fits with each community that is on route. The visitor experience is delivered by those along the route and as such, their buy in and participation is key to the routes overall success.



Figure 2: BC Circle Routes with the Pacific Marine Circle Route Identified

The Pacific Marine Circle Route (figure 3) originated in 2004 when the province of BC purchased 25 kilometers of logging road from TimberWest for \$2.5 million. This stretch of road connects Lake Cowichan to Port Renfrew (Bainas, 2005). An additional \$3 million was spent to upgrade the road. The intent was to maintain a good quality gravel road. In the spring of 2005, the Pacific Marine Circle Route was officially opened. After two years of use the chip seal finish on this new highway began failing and lobbying from communities on the route commenced to see the entire length of the highway paved. This lobbying mostly facilitated by council members of Lake Cowichan, and resulted in the provincial government paving the highway in 2007, with the final 5km of paving completed in 2009 (J. Knight, personal communication, November 1 2011). The paving of highway 14 now allows rental cars to drive the road which were not permitted to drive the private logging road. This has an immediate effect on tourism in the area and allows for expansion of car rental companies. The communities of Duncan, Lake Cowichan, Port Renfrew, Jordan River, Shirley, Sooke and Victoria have now been connected in a way they have never experienced. This new opportunity has lead to a need for extensive collaboration among these communities. The Cowichan Watershed Board spearheaded by Lake Cowichan Mayor Ross

Forrest has been the catalyst for this collaboration. This collaboration is used in order to create a cohesive tourism product along the Pacific Marine Circle Route. The tourism product will be ever growing and it will be in the cohesive collaboration of this region that will ensure its success.



Figure 3: Image showing the Pacific Marine Circle Route  
Source: [http://www.th.gov.bc.ca/Circle\\_Routes/pacific\\_marine.htm](http://www.th.gov.bc.ca/Circle_Routes/pacific_marine.htm)

On Vancouver Island most traffic moves through the main corridor connecting Victoria and Nanaimo. The TransCanada Highway connects these two cities and, as a result, greatly influences tourism choices of both residents and visitors. The capital region of Victoria, as well as Nanaimo and Tofino have significantly higher room revenues than anywhere else on the Island (TVI, 2010). The key to the success of these areas are system amenities such as accessible transportation, hotels and cell phone/ internet availability. Cell phone reception is not available on most of the island. Cell phone reception is only available in the main traffic corridors and these corridors are best exemplified by service maps. For example, as shown in Figure 4, this service map of Rogers Wireless cellular reception highlights the main travel corridors within Vancouver Island; half of the Pacific Marine Circle Route is not available.

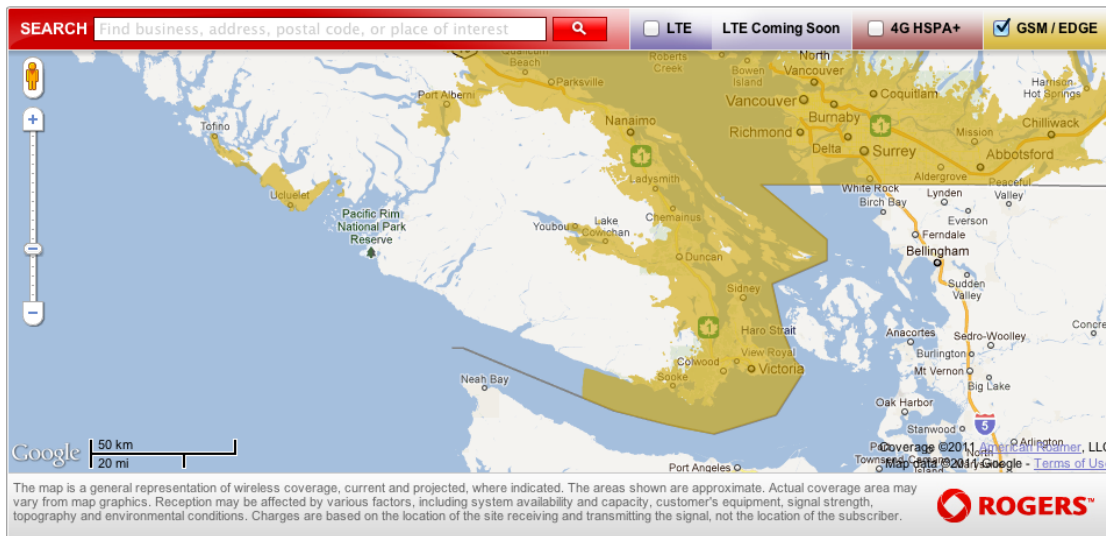


Figure 4: Rogers Wireless Map showing connectivity in the Pacific Marine Circle Route Area  
Source: Rogers Wireless

Residents and visitors can get to Victoria and Nanaimo three ways: air, ferries and major driving routes. Tofino was the closest and most accessible town on the west coast of the Island. This is due to a fully paved route that connects to the TransCanada highway. Now with the route between Lake Cowichan and Port Renfrew paved towns on the west coast of Vancouver Island are more accessible and take about half the amount of time to get to from Victoria than it does to Tofino.

## METHODOLOGY

The purpose of this study was to develop a case study that: a) identifies the natural, cultural and system amenities along the Pacific Marine Circle route which have value for local residents and visitors, b) to assess the current quality of the tour experience as delivered by the range of stakeholders and communities involved, c) to analyze the extent of engagement and regional collaboration on the delivery of the circle route, and d) to suggest ideas to assist in the future development of the strategy for rural diversification.

The research was guided by the use of Rapid Rural Appraisal (RRA) methodology. The RRA method of study is an approach to studying topics in rural areas. In short, it is guided by a diverse research team so that multiple perspectives on the topic under study are provided. This ensures that the results are valid according to different audiences. The approach is done by an intense period of fieldwork in the rural areas usually where a combination of research methods are used to gain a better understanding of the topic under study. In this case, the research team was comprised of ten graduate students from all regions of Canada (urban, rural and First Nations), and from international contexts such as India, China and Mexico. The team was assembled after a decision to study the circle route was made by Dr. Nicole Vaugeois based on conversations with Ross Forest, Mayor of Lake Cowichan. The team began its preliminary work by doing secondary research on plans for the region, looking at background documents and analyzing what is portrayed about the circle route via various media (web, print media). The team met with Ross Forest to help provide context to the study region. The engagement of the group was promoted via Don Barrie, who promotes the route within the Cowichan Region and who has been engaged in collaborative work with other stakeholders along the route. Each student was assigned a portion of the route to investigate in more detail and to lead while on the tour. While on route, the

members of the team met with key stakeholders, visited the sites that have been promoted along the route, and discussed gaps in their overall perceptions and experiences during the trip. In this sense the study used a modified gap analysis whereby the group compared: a) the promotion of the route with their experience and, b) the keys to success for route tourism with the practices currently used in the PMCR. Post trip, the group analyzed their results and shared them with the Cowichan Watershed Board one week following the study.

There are limitations to the observations in this report. The first limitation to the study is the time of year. The study took place on the week of October 24<sup>th</sup> until October 28<sup>th</sup> of 2011, which is shoulder season for tourism along the route. Some operators were not available and some venues were not open which may influence the experience of the team. While the group experienced beautiful warm weather conditions and colorful fall scenery, the experience may have varied if these were not present. The study team traveled the route in the opposite direction than it is promoted (counter clock wise from Lake Cowichan). This helped to identify gaps for travelers who choose to go in this direction but there may be areas where experiences would be different traveling from the other direction. Finally, the group was not a typical group of visitors. They were on a tour with a purpose which may influence their overall experience. More detail on the itinerary for the tour can be found in the appendix.

## FINDINGS

The findings section will be separated into two sections. First, the observations on the amenities promoted on the route and the actual experience of the research team will be outlined with gaps identified. Then, observations on how the tour is being developed will be compared to factors of success found in the literature.

In order to have a circle route evolve, destinations need to develop awareness in the mindset of visitors which is largely done through promotional efforts. For overall satisfaction to occur and demand to increase over time, the destination needs to provide an experience that is consistent with what is being promoted to visitors prior to their decision to travel. In this study, the team identified the natural and cultural amenities and nature of experience as shown in the marketing literature prior to their visit. Comparing the marketing literature with their actual experience helped the team identify potential gaps that emerged in the field. As a result, the research team was able to create an inventory of the natural and cultural amenities on the circle route.

## NATURAL AMENITIES

The first type of amenities that are promoted along the route are natural amenities. The very title of the route incorporates these amenities where one expects to experience contact with the “Pacific” and all things “marine”. These are some of the amenities promoted via web and print media.

### BEACHES (OCEAN VIEW)

From Port Renfrew and Sooke, there are lots of beaches and ocean view trails promoted. According to the websites information, these beaches are attractive places to visit. The beaches promoted in the Pacific Marine Circle Route (PMCR) included the following;

1. *Botanical Beach*: the beach with fantastic geological features, which is also known as the “natural Jewel” in the newly created Juan de Fuca Provincial Park. Botanical Beach has extensive upland habitat, but is best known for its abundance of intertidal life. Botanical Beach



offers one of the best opportunities to view intertidal marine creatures and plants on Vancouver Island. (Vancouver Island, 2011).

2. *Jordan River/ Sombrio Beach*: Jordan River is located in Juan de Fuca Provincial Park, on the West Coast Road, approximately 60 km northwest of Victoria, and offers a traffic view of the open Pacific Ocean. Jordan River is also the home of the Surfing Association. There is another surf-city called Sombrio Beach, on the west of Jordan River. Sombrio Beach is a first rate surfing area, and the best place to ride the waves on Southern Vancouver Island (Discover Sooke). Visitors can explore or hike along the beach, enjoy the fantastic ocean view or try their hand at surfing in this world-class surfing area (BC Parks, 2011)
3. *French Beach*: Located 21 kilometers west of Sooke, French Beach Provincial Park offers sandy beaches, a provincial campground and full amenity park facilities. It is a good place for families or groups to spend the day, featuring playgrounds, large lawns, picnic areas and BBQ pits (BC Park, 2011).

#### OLD GROWTH FOREST

Beyond beaches, the route also promotes a significant number of forestry amenities such as old growth forests. Lots of ancient trees can be found between Lake Cowichan and Sooke. Port Renfrew is “Canada’s Big Trees Capital,” with the largest Douglas fir on Earth (the Red Creek Fir), the largest spruce tree in Canada (the San Juan Spruce), and the Avatar Grove (akin to the Cathedral Grove of Port Renfrew), all in close proximity to town.

1. *Avatar Grove*: This piece of land has been dubbed “Avatar Grove”, after the movie, for its large and gnarly trees. Avatar Grove is a phenomenal yet threatened stand of giant old-growth red cedar and Douglas fir alongside the Gordon River, which is approximately 15 minutes away from Port Renfrew, BC. This incredible old-growth forest growing on valley bottom, flat terrain could be the Cathedral Grove of Port Renfrew. Rare giant old-growth Douglas fir, of which 99% have been logged from Vancouver Island, are also found scattered throughout the forest. Beautiful fern draped creeks with moss covered rocks and small waterfalls meander through the woods along their way to the Gordon River. The forest provides habitat for Roosevelt elk, Palliated woodpeckers, cougar, bears, wolves, and more. Avatar Grove is known for the following features:
  - *Canada’s gnarliest tree*
  - *Dense concentrations of giant old-growth red-cedars and Douglas fir trees*
  - *Amazing red cedars covered with contorted burls and twists*
  - *Lush, fern draped creeks and streams with small waterfalls and mossy rocks.*
  - *Easy to navigate flat terrain.*
  - *The beautiful Gordon River right nearby for summer swimming (Ancient Forest Hiking Guide, 2011).*
2. *Red Creek Fir*: The largest Douglas fir tree in the world grows only a 45 minute drive from Port Renfrew, BC. The Red Creek Fir measures 43.7 feet in circumference (14 feet in diameter), stretches 242 feet tall, with a crown spread of 75 feet. The tree is truly mammoth in size and is a must-see for big tree lovers. The presence of the giant Red Creek Fir is a testament to these

superb growing conditions. Said to be Canada's largest standing Fir Tree, the Red Creek fir is estimated to be 750 years to 1,000 years old (Discover Port Renfrew).

3. *Harris creek spruce tree*: This tree located northeast of Port Renfrew, BC, and somehow managed to escape the saw blade in the 1800's. It's well over 200 years old and will probably live for hundreds more. Even though it is not protected in a provincial park, the respect and awe from visitors and locals will probably let it be (Vancouver Island Big Trees, 2010).

## PARKS AND TRAILS

The route travels through and by a number of protected areas.

1. *Juan de Fuca Provincial Park*: The Park was established April 4, 1996, and has an area of 15.28 km<sup>2</sup>. This park offers scenic beauty, spectacular hiking, marine and wildlife viewing, and roaring surf along the Pacific coastline of the Strait of Juan de Fuca on southern Vancouver Island. It is a major feature of the magnificent coastal park and a popular 47-kilometre wilderness hike stretching along the western shoreline. The trail encompasses a section of the historic 'Life Saving Trail' which was used in the past by stranded sailors wrecked from sailing along a treacherous ocean coastline nicknamed the 'Graveyard of the Pacific (BC Parks, 2011).
2. *Cowichan River Provincial Park*: Cowichan River Provincial Park is a 750-hectare area stretching almost 20 kilometers, from the village of Lake Cowichan to Glenora, just south of Duncan. This park is especially popular during the summer and is comprised of a number of pools along a 27 km (17 mile) corridor on the Cowichan River. This park offers visitors two separate campgrounds one at Stoltz Pools, and the other at Skutz Falls, plus providing access to the Cowichan River Footpath and the Trans-Canada Trail. There are also a large number of recreational opportunities in the park including the very popular summertime pastime of tubing and swimming on the river. The park also offers opportunities for white-water kayaking, cycling and horseback riding on the Trans-Canada Trail and hiking the Cowichan River Footpath, which has fly-fishing available (Vancouver Island, 2011).

## MARINE LIFE

It is easy to find and see different Marine life on the Pacific Marine Tour route, especially between Port Renfrew and Sooke. The parks consist of a variety of marine life, from microscopic creatures to 100-tonne blue whales. Big or small, plant or animal, rare or common, marine life depend on one another and on the environment around them. For example, it is very common for visitors to come across seaweed, such as bull kelp while walking the beaches. Aggregating Anemone is also easy to find on the rocks in most beaches. Overall, marine life commonly found in the parks include salmon, rockfish, orcas, humpback whales and horned puffins (National Geographic, 2011).

## CULTURAL AMENITIES

### MUSEUMS

1. *Lake Cowichan Museum*: On the circle route, there are three museums available to visitors. First is the museum in Lake Cowichan, it is a special museum, because it was once a train station. 'The Kaatza Station Museum and Archives, governed by the Kaatza Historical Society, is housed in a 1913 Esquimalt & Nanaimo Railway Station. The Kaatza Station Museum is located on South Shore Road in Lake Cowichan. Visitors can often find varied displays, photos, murals and archival

material, which is a great way to learn the culture and history in Lake Cowichan (Kaatza Station Museum and Archives).

2. *Sooke Museum*: The main museum building contains many exhibits as well as an art gallery. In the museum visitors can expect to find a Gift Shop and Visitor Information Centre. Outside visitors can explore the special displays and artifacts surrounding the Museum. These include a working restored steam engine yarder, blacksmith shop, and a rotating lighthouse light (Sooke Region Museum and Visitor Centre).
3. *BC Forest Discovery Centre*: The BC Forest Discovery Centre is an engaging museum, which tells the history of forestry in the Cowichan Valley. This 100 acre open-air site showcases an extensive collection of donkey engines, locomotives, and tools from the BC logging industry. Visitors can explore forestry exhibits, an operating sawmill, a lookout tower, a logging camp, and the Koksilah ranger station. Visitors can also experience a ride on a locomotive and take a forester's walk to familiarize themselves with the natural wonders of BC forests. Suggested in the literature, visitors are encouraged to experience the following amenities:
  - *Forester's Walk*: An exploration of northwest coastal rainforest to discover 400 year old fir trees and abundant local bird life.
  - *Antique Vehicle Building*: An exploration of a collection of logging trucks which spans 40 years from the early 1900s to the 1940s.
  - *Lookout Tower*: Climb up a lookout tower; once inside, discover how tower operators detected and reported forest fires up until the 1980s in BC.
  - *Operating Sawmill*: Discover how a 1920s sawmill operates to create lumber and other wood products (BC Forest Discovery Centre).

#### LOCAL FOOD

On the Pacific Marine route, there are a number of producers of local food that are promoted, mostly along the east coast portion. As the promotion of local food has been a priority for agriculture suppliers and provincial ministries, the availability of local foods are an attractive amenity for visitors and residents. For example, the Duncan Farmer's Market is very famous for the wide variety of local products. All of the local food products, such as fruits, vegetables, meat, fish, milk and other variety of foods are produced in local farms (BC Association of Farmer's Markets, 2011).

#### ROAD QUALITY

When the Pacific Marine Circle Route was established it was promoted as a new system amenity to enhance access from east to west coasts through the Lake Cowichan Port Renfrew areas. The route is promoted as safe and accessible and indeed a number of print and electronic publications encourage visitors to travel the route "in a day". Visitors are encouraged to fill up their gas tanks, as there is only one gas pump at the Port Renfrew Marina. In the literature, visitors are also informed to be aware of the logging activity that is still popular in the area. Between Monday and Friday, 7:00am to 5:00pm, logging trucks are expected to be on the road. Visitors are basically warned to drive with caution when on route (Sooke to Port Renfrew).

## SUMMARY OF WHAT IS BEING PROMOTED

- The current promotion for the circle route experience can be summarized as:
- An opportunity to see large trees;
- An opportunity to access world class parks and trail systems;
- An opportunity to have great views of the ocean and to access beaches;
- An opportunity to experience diverse local cultures and eat local foods;
- An accessible, easy to drive in a day, route largely originating from Victoria.

## PROMOTIONAL EXPERIENCE VS. ACTUAL EXPERIENCE

Analysis of the Pacific Marine Circle Route (PMCR) shows that there are some notable gaps in what is being promoted as an experience vs. the reality of the experience. It is important to note that many of the omissions in amenities being marketed are being promoted by tourism bodies within their own literature, but they do not appear as amenities promoted as part of the circle route (without some work on behalf of the visitor).

### GAPS

As suggested in the marketing literature prior to the visit or word-of-mouth, visitors are encouraged to start from Sooke to Port Renfrew; however the research team on route started from Lake Cowichan to Port Renfrew. In Lake Cowichan, the few natural and cultural amenities visited included the Trans Canada Trail, the Cowichan Lake and the Kaatza Station Museum. Amenities that emerged and were **not included or marketed were the Cowichan Lake**, a lake known as the largest of fresh water on Vancouver Island (Cowichan Lake District Chamber of Commerce). Another natural amenity discovered in Lake Cowichan was the **Trans Canada Trail**, which follows an abandoned Canadian National Railway lines across Vancouver Island. With **restored trestle bridges** and some magnificent views as the trail crosses rivers, this is an amenity that was surprisingly not marketed.

The drive from Lake Cowichan to Port Renfrew is described for visitors as an accessible road with access to ancient forests which held true. However the research team felt that the warning signs for logging trucks, limited evidence of visitor or safety information and clear cuts presented a less than favorable travel experience. Similarly, residents often described the road as “treacherous” or “dangerous”. It appears that the experience is relative and different for people right now but the group felt there could be enhancements of the stretch if it is being promoted as a visitor experience.

On route to Port Renfrew, sites visited included the Harris Spruce Tree and the Avatar Grove. The Avatar Grove is being heavily promoted by some of the visitor information centers<sup>2</sup> and in electronic format; however the experience of the group was that the site was inaccessible and not yet ready to host visitors. The signage was poor, unprofessional and the hike was felt to be dangerous and confusing. The group felt that by promoting something that is not yet product ready, visitors may actually cause damage to the site that is being promoted as in need of protection.

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<sup>2</sup> It is important to note that some visitor information centers would not promote the Avatar Grove as they did not feel it was ready to host visitors (a similar feeling to the study team)

As for the Harris Creek Spruce tree, a natural amenity that was marketed in the PCMR literature, this turned out to be a pleasant surprise. In comparison to the promotional experience and the actual experience, the research team identified the site, as a magnificent tree for people of all abilities. With it being easy to find, well marked from the road, nice and flat, and easily accessible this is an amenity that PMCR should continue to promote (Scenic Travel Canada, 2011). The only notable gap identified is the fact that it was not wheel chair accessible which may be important depending on the audience being targeted.

After the team visited the Harris Creek Spruce tree, they continued on to Port Renfrew community where they discovered a lot of businesses/organizations closed for the winter season. According to the marketing literature, Port Renfrew is rich in natural and cultural amenities. Staring with an ocean that provides visitors the opportunity to surf, windsurf, paddle, fish and enjoy the natures of wildlife and scenic beauty. In contrast to the experience, the natural and cultural amenities were there but not easily enjoyable with difficulty to access certain services such as charters<sup>3</sup>. Another example included the closure of the gas station, located at the Port Renfrew marina. As described in the marketed literature, it was expected to be open, however the research team learned otherwise. With these notable gaps, the research team did not experience that Port Renfrew was “a community with lots of things to do” (Discover Port Renfrew).

On route to Sooke from Port Renfrew, the natural and cultural amenities promoted in the PMCR are obviously present. Through marketed materials, visitors are expected to see an abundance of beaches and marine life, in which the research team explored; however in their experience they discovered that the beaches were present but not visually or even easily accessible. There were glimpses of water from Port Renfrew to Sooke, with the exception of Jordan River, but mostly the journey is through forest. In order to access beaches, clear signage is not always available or noticeable in time to make safe turns off the main highway.

Sooke to Victoria: The natural and cultural amenities identified in the marketing literature of Sooke, shows that it is a community rich with attractions. As expected, the research team discovered an abundance of ocean waters, parks and trails, old forest, marine life, and a notable presence of the local First Nations group. The research team learned that the community leaders and citizens are developing a cultural plan that involves a number of stakeholders in the community.

Following the meeting, the research team had the opportunity learn and explore the sustainable development that is taking place in a First Nations community. It was learned that a First Nations group has one of the biggest solar panel systems in British Columbia. With a lot of hard work, commitment and collaboration within the village, the First Nation group was able to benefit both their community and the Sooke Region. As a result of this experience, the research team discovered that projects linked to sustainable development have the potential to be marketed as an amenity.

Other amenities explored in the Sooke Region included the Sooke Potholes, the Galloping Goose Trail and the Sooke Harbour House. As promoted in the marketing literature, these amenities are rich with

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<sup>3</sup> Many were closed for the season

wonderful opportunities to experience. However, as discovered by the research team, the road conditions were described as a potential gap in the PCMR drive. The layout of the road system can create confusion and difficult access to certain venues.

As the research team made their way to the southeast part of the route, they visited amenities that were both marketed and not marketed. On route from Victoria to Cobble Hill, the research team discovered the Goldstream Provincial Park, which is not included in the marketing literature on the route. In their exploration, the research team identified this park as a star amenity to visit. With abundance of old growth forest and a world class salmon-spawning river, it is an opportunity for both fun and educational purposes. Subsequent to the park visit, the team travelled to Cobble Hill where they discovered the Kinsol Trestle Trail, which shows great prominence for a visitor's experience. This site known for its value, beauty and historical past was a pleasant surprise for the research team. As the team explored the rest of Cobble Hill region, they were amazed with the various amenities available. From winery's, to farms, to trails and even horse stables, the research team was pleasantly surprised with abundance of amenities Cobble Hill has to offer. Currently, these are being promoted by Tourism Cowichan but not necessarily as part of the circle route experience.

Lastly in the region of Duncan, the research team identified the community as having great potential for visitors to explore. The natural and cultural amenities marketed in the Duncan region were there, but along the way many other amenities were also discovered. Duncan is normally promoted as the city of totems but was identified as having much more to offer. In comparison to the literature promoted, the research team experienced more than expected. With time and opportunity to explore, the teams were introduced to a variety of attractions such as the Teafarm, which is located in the North Cowichan area. The Teafarm is an eleven-acre organic farm that grows a variety of plants and flowers that are blended with fair trade and organic state grown teas from around the world as shown below (Tea Farm).

As a result of time to explore the communities, the research team was able to see the potential to further enhance the experience of the PMCR. In this study, a value of natural and cultural amenities shows that the factors extracted from the circle route can increase the visitor's experience. As shown in table 1, comparison of the promotional experience, expected experience and actual experience can also reveal some notable gaps to be addressed. The table describes how sites along the route, timeline, signage, marketing and infrastructure can impact a visitor's overall experience. To provide an example in the table, the promoted experience may cause a visitor to expect an ocean view drive however some areas require insight or warning for a change of direction to view the beaches. Another example could be a visitor's expectation that the circle route can be completed in one day but realizing it requires more days to fulfill the experience.

Table 1: Promoted Vs. Actual Experience of the Research Team

<b>Promoted Experience</b>	<b>Expected Experience</b>	<b>Our Experience</b>
<b>Sites along PMC route</b>		
Beaches	Plenty of them, easy access	Difficult to see beaches, some signage was inadequate or confusing to access
Parks & Trails	Abundant and easy access	Abundant, but a few were difficult to access (poor signage or road access)
Museums	Present and able to learn history	Present and learned history. Could be more collaboration to tell a regional experience community by community
<b>Timeline</b>		
One day trip	Easy to do in a day	Definitely not a one day drive! Team did five days in two vehicles and still missed amenities
<b>Signage</b>		
Pacific Marine Circle Route Signage	Easy to follow	Overall better than expected. Leaving Victoria (no signage until after the Sooke exits), little confusing. No signage from Nanaimo until Lake Cowichan exit yet some websites should the route starting in Nanaimo.
Overall Signage	Easy to follow	At times too many signs, difficult to follow & easy to get turned around. Need more visitor information and safety signage
<b>Websites</b>		
Pacific Marine Circle Route Sites	Thorough and best resource for information on the route.	Very little information, not thorough, contradicts other information on the website in terms of route and amenities on route
<b>Brochures</b>		
Natural Amenities on route	Information on quality and access	Lots of information, hard to find in one spot, some contradictory information, overwhelming (too much information)
<b>Pictures</b>		
Samples places to see	Representative of the reality	Too much emphasis on route being linked to Victoria vs. the communities and amenities on route. Many amenities not shown or promoted, some images difficult to discern location
<b>Roads</b>		
Good Road Conditions	Easy & safe drive	Felt unsafe & felt the need to slow down for winding roads (logging trucks)

## GAP ANALYSIS – ROUTE DEVELOPMENT

This section focuses on providing the findings of the modified gap analysis for the supply side of the Pacific Marine Circle Tour study. The following success factors were drawn from a synthesis from the literature and will be used for comparison to what was observed in the field by the research team:

1. Identification of what tourism development is and how circle routes impact communities;
2. Grass roots involvement, resident buy in and collaboration;
3. Public/private support and alliances;
4. Slow progression in evolution;
5. Understanding of community/ business/organization placement;
6. Significant market research;
7. Consistent and accessible information (one conduit);
8. Safety;
9. Theming;
10. Clearly defined path

Considering all of these success factors, the research team was able to do a modified gap analysis of the Pacific Marine Circle Route. The following will cover each factor and compare what is suggested in the research literature to what has been done to develop the PMCR.

### 1. IDENTIFICATION OF WHAT TOURISM DEVELOPMENT IS AND HOW CIRCLE ROUTES IMPACT COMMUNITIES.

Tourism development is comprised of many different players, including, but not limited to: municipal, provincial and federal governments; private enterprise (hotels, gas stations, campgrounds, adventure tourism operators, cafes, restaurants, vineyards, farmer's markets, bed & breakfasts, golf courses, grocery stores, fishing guides, outdoor education centers, bike stores, marinas); and not-for-profit organizations (destination management organizations, museums, visitor information centers). The people involved in tourism development are residents of the communities, tourists to the area and in many cases, outside bodies or investors.

Circle routes can benefit communities by increasing access to a previously inaccessible or hard to access area (e.g. Port Renfrew residents have the option of traveling east to Lake Cowichan and Duncan or south to Sooke and Victoria), therefore providing both residents and tourists more route and destination options. Increased exposure from circle route development is beneficial to private operators and small business owners as their potential market expands to include more vehicle traffic. This increased exposure may also lead to more people moving to an area (amenity migration), which may lead to an increase in small business development and services offered within a community (benefiting both residents and visitors).

While in the field, the research team heard a variety of opinions about the Pacific Marine Circle Route. First, there appears to be quite a difference in the recognition of the circle route in the east and west coast communities where those along the west are more likely to understand what it is and that they are on it. On the east coast, a number of people (including operators) were unaware of the route, which



would inevitably limit their ability to promote it or be engaged in its development. For example, one person asked “The Pacific Marine what?”, and another asked “Is it a shortcut or a circle route?” Another commented that “We [operator] just see ourselves as participants in the circle route not really as part of the creation”.

There appears to be a strong sense of place among the residents that were met with people saying “Quality of life is about diversity of community”, or “Create a great place to live, tourists will come”. Many recognize the role of tourism with amenity based rural development. For example “The connection with amenity based tourism is focused on quality of life for their own people- the tone has changed from residents not wanting to spend money on beautifying community as it’s a waste of money, to residents valuing the importance of this to keep people here. Another individual commented that “Amenity based development is about people choosing to live or visit based on quality of experience”. Others are conscious of the role that amenities could play in rural population “Community development is about attracting professionals and retaining them”, or “A green community attracts young people”. Some stakeholders expressed opinions or questions about what the circle route should be promoting. For example “Do we want to market multiple amenities or do we market quality of experience?” Or with respect to specific amenities “Tourists need to feel the flavor of a community – the importance of artists in a community”. And there was evidence of concerns around tourism or growth in some communities “Behavior of visitors creates animosity creates tension and animosity within community”, or on environmental consequences “We [First Nations] feel that the environment will go down with real estate going up”.

These comments illustrate the diversity in the understanding of individuals and communities as to what tourism and circle route development are. While some stakeholders seem to have a broad and deep understanding of the benefits of the development of the Pacific Marine Circle Route, others are resistant to and/or unaware of this particular circle route. There is room to increase awareness of the route among stakeholders, particularly along the eastern communities and to expand engagement of stakeholders to identify concerns early.

## 2. GRASSROOTS INVOLVEMENT, RESIDENT BUY IN AND CAPACITY BUILDING

Grassroots involvement, resident buy-in and capacity building relate to the bottom-up approach to sustainable development. Resistance often comes from residents being forced to take part in tourism development without proper consultation processes. In order to be successful, circle route development needs the support of the residents, as they are the driver’s in their own community development.

The research team observed great divides between communities in terms of grassroots development, resident buy-in and capacity building. Some communities support the Pacific Marine Circle Route through regional associations and municipal governments, while other community associations want no part in the development of the circle route, as they only see the costs to their communities. Others, as mentioned, do not even have knowledge of the PMCR as they are situated in a high traffic corridor of Vancouver Island.

### Comments linked to concerns about change:

- “People from PR and JR are not happy about increased exposure to their area”
- “Long term residents are resistant to change, but that is not unique”
- “Change is happening in our communities and people do not even know it is happening”,
- “There’s a lot of resentment in the bigger community, ‘old timers’ resenting new people with innovative ideas, people take so much pride in and ownership over their area, it’s hard to move forward if it’s not their idea” (Sooke)

### Comments with respect to opportunities

- “Need the right people and need to seize that opportunity”,
- “The [FN] visioning plan creates whole community collaboration to create long term sustainability and the memory is still there from the elders on how to move back to sustainability”
- “The biggest risk in the solar project was community buy in” (Sooke),
- We [Sooke] have a stronger connection to Port Renfrew than to Beecher Bay, Beecher Bay needs to get and see the benefits”
- “There are a lot of groups doing things – this hasn’t been sorted out, the community needs to come together to see who’s doing what” (Sooke)
- “There needs to be partnering with the Sooke Regional Tourism Association, the Chamber of Commerce, the arts and cultural sector and economic sector...work needs to be done in community collaboration”
- “A lot of Sooke has been built on volunteerism, driving chamber of commerce, museum etc, we need to build capacity and hire staff, it’s critical as that’s **whose job it is to create networks**” (Sooke)
- “How do you create friendliness and assess it?”

### Comments on issues being discussed with respect to development

- “Groups are lobbying for development and groups are lobbying for protection”
- “We want people in the downtown (long term focus), vibrant community but the reality is workers work away from the downtown area, being a bedroom community is hard....we have a spread out population” (Sooke)
- “The challenge for business here is Colwood because that is where the infrastructure is being built” (Sooke)

### 3. PUBLIC/PRIVATE SUPPORT AND PARTNERSHIPS, STRATEGIC ALLIANCES

Sustainable tourism development is advantaged when the public and private sectors support one another. Partnerships and strategic alliances are most effective when individual strengths are utilized to their full potential. There are many situations (policy implementation, taxation laws, incentive programs) in which governments can make or break private enterprise – by forming partnerships and alliances based on successful governance models, both public and private interests can be considered and advanced.

#### Comments about representation and voice in current governance

- “Tricky within a regional district - let alone surrounding areas”
- “Our voice comes from Sooke and Victoria”, (discussing support that comes to the town of Port Renfrew),
- “We don’t have any specific plans to involve businesses to make them aware, more through the Chamber of Commerce”

#### Comments on the roles and actors needed

- ““Need entrepreneurs to connect people with products” (bike tours, kayak rentals, guided hikes),
- “Local government needs to step it up as provincial government support has declined”
- “Opportunity for local government to really take initiative with support from provincial government by way of facilitation of processes i.e. funding a forum”
- “If there is any economic development going on they have to go through us (FN), we want our rights back”,
- “Get private developers to the table-they have the land”
- “Who controls what?”
- “We need to look at, on a regional level, assets and liabilities - what could local, provincial, federal government do as well as what businesses and citizens can do” (Sooke)
- “There have been issues with the timing of the guide that has come out and also our museum is our tourist information center and therefore has not been invited to any meetings regarding the circle route”,
- District needs to play key role in infrastructure” (development and maintenance)

#### Comments about the state of current collaboration

- “Consistency and continuity of information both within and between visitor information centers because not all info centers are run by Chambers of Commerce and there tends to be high turnover with staffing (volunteers, seasonal staff)
- “No natural processes or model for collaboration” (for circle routes)
- “There have been difficulties engaging First Nations in the process”

- “Governance provides records for many stakeholders”
- “If it was all just one district it would be a lot easier” (Sooke)
- “The association of Vancouver Island Coastal Communities have to work as a team in terms of collaboration”

These stakeholder comments further the idea that a governance model and a process that expands engagement is needed to allow all voices to be heard in the continued development of the Pacific Marine Circle Route.

#### 4. SLOW PROGRESSION IN EVOLUTION

The reality of engaging others and building capacity is that the process will be slower, and slow progression has been shown to be a factor of success in circle route development. In relative terms, the PMCR is in its infancy with respect to tourism product development. Stakeholders must understand that its evolution will take time, patience and process. Ensuring products and infrastructure are developed, ready, and maintained, and communities are engaged will go a long way in the long-term sustainability of the PMCR.

- “Ready for provincial government involvement because members are now on board”
- “Small incremental changes are creating beauty”
- “We have been successful for community buy in because a visioning process was created to understand the effects on the 7<sup>th</sup> generation-the whole community engaged, children, youth, adults and elders and took a year to create a vision for a healthy sustainable community so that we are self sufficient in energy, creating a renaissance of cultural values, economic sustainability. Also the continuity of the goals will remain even with changing leaders and staff because the whole community took part to create it”
- “ We are learning to work on issues”
- “We have to be careful of not going too far too quick, we need to keep the slowness of what we’ve achieved”

#### 5. UNDERSTANDING OF THE ROUTE AMONG THE COMMUNITIES AND BUSINESSES

#### 6. SIGNIFICANT MARKET RESEARCH

In order to successfully market a circle route, significant market research needs to be completed and documented by those who will be marketing the route. Many stakeholders along the Pacific Marine Coastal Route seemed to have a fairly good understanding of who their current or desired markets were, but at this stage, there is not a unified target market for the route. There appears to be an assumption that current markets will be the same as circle route markets which may or may not be the case. In order to streamline the messages and offerings on route and satisfy the needs of visitors, market research is needed.

- “Lots of International visitors are looking to go to the west coast of the island and this route can be a good alternative instead of going to Tofino” (Goldstream)
- “Need for more promotion of circle routes within B.C”

- “We’d like to have greater occupancy off season” (Lake Cowichan)
- “There is an opportunity for niche markets such as mushroom foraging as we’ve noticed with the success of our salmon and mushroom festival” (Sooke)
- “We’re also aware of a significant motorcyclist market out there” (Sooke)
- “They [tourists] want to feel unique, there are issues with infrastructure, we need to cater to Europeans and what they see in advertising - there needs to be truth in advertising” (Sooke)
- “Sooke seems to want to include everything to offer, cultural, natural and identify four major sectors of wild, agricultural tourism, sports, and arts and culture”

#### 7. PROMOTION - CONSISTENT AND ACCESSIBLE INFORMATION (ONE CONDUIT);

Successful circle routes depend on consistent and accessible promotion of information related to the route. Mixed marketing messages create uncertainty, which can lead to confusion, misrepresentation and a negative experience for both the visitor and the host community. The circle route is currently being promoted by a variety of organizations, often with inconsistent information. There is no one identifiable conduit of information at this point. Much of the material is on the web, which, with limited internet access on route – is unobtainable to travelers. Print media is dominated by images of Victoria and according to comments from stakeholders on route, they feel they have limited to no say as to what is included in the official circle route brochure. While there is ample quality print media from the tourism organizations on route, many do not promote the circle route itself. Visitor information centers are of good quality, however they have limited access for weekends, evenings and shoulder seasons which prevents visitors from having access to information outside of normal hours.

Visitor information staff in Victoria were promoting the trip as a day trip, yet had not been on it. If leaving too late from Victoria, there is a good chance that visitors could find themselves in Port Renfrew too late to complete the journey. As Victoria is the key origin point, as currently promoted, efforts need to be done to familiarize staff on the route and what it has to offer. When asked about getting to the west coast for beaches, staff were advising the research staff to travel to Tofino when possibilities along Sooke to Port Renfrew were closer and more accessible. While on origin points, consideration should be given to recognizing that there are multiple points of entry on this circle route. For example, Nanaimo receives a large number of visitors via the ferries who may be interested in doing the circle route. The communities on route such as Ladysmith and Chemainus can provide numerous experiences in keeping with the Pacific Marine theme, yet they are not included on the promotion of the route, and there is no signage from Nanaimo to the route until one reaches the Lake Cowichan turn off.

- “We don’t have a say in what is in the circle route brochure – that is decided in Victoria for us”
- “Too many groups initiating change, we need to link together”
- “Every community should be involved in proofreading promotional materials”
- “Tourists don’t really know the route what’s open and what’s not.”

- “Map is a crucial tool - has to have the elements specific to business – we have an internal issue on how that gets developed - for example without advertising”
- “There are a number of hiking and trail maps available but it is difficult to keep them up to date and different DMO’s provide different ones that aren’t always accurate” (Duncan).

#### 8. SAFETY

Safety is paramount for visitors and residents along circle routes. Many stakeholders from Lake Cowichan through to Jordan River addressed the issue of road safety for both residents and visitors. From getting lost because of lack of signage to information on road conditions to lack of cell service to single-lane bridge concerns to maintenance of road conditions to slow-vehicle and view-point pull offs to the behaviour of drivers were all mentioned in relation to safety on the Pacific Marine Circle Route. Because of the relative remoteness of some sections of the PMCR, response times and availability of assistance to those in need is greatly limited. The importance of planning for a safe circle route cannot be underestimated.

- “Roads are dangerous, a long term plan is needed”
- “I hesitate to send people that way [Port Renfrew - Jordan River] due to safety and cell phone coverage” (Cowichan Bay)

#### 9. THEMING

Stakeholders along most communities on the Pacific Marine Coastal Route seemed to understand the concept of theming for the route, however, there seems to be discrepancies with how to go about theming the route and whether or not there should be several themes based on the market or one all-encompassing theme. Some theme ideas that emerged from the PMCR communities are motorcycle touring, bicycle touring, slow food exploration, First Nations experiences, arts and culture, culinary tours and wine. “We’ve had a lot of discussion on the possibility of cycling however there are major issues with infrastructure and safety on the road” (Sooke). Some communities were also somewhat unclear as to what this would mean as they wanted to promote all of their amenities. There needs to be clarity about what a circle route is with respect to the overall regional tourism strategy – it is ONE tool designed for specific markets. Treating it as tourism in general may lead to diffuse strategies and confusion among the roles of the many stakeholders involved in tourism and economic development.

#### 10. PROTECTION - CULTURAL AND NATURAL SPACES

The attractiveness of current amenities must be protected over time to ensure that promotion and use does not degrade them. They are the core of all non extraction based development strategies. Those involved in protection of the amenities on route also need to be considered as stakeholders in the process, otherwise tension and conflict will fester. There is already evidence of the growing concern around development and exposure through tourism.

- “We [Cowichan Bay] are having issues with regards to development and the protection of wildlife, we have sensitive ecosystems here such as eel grass beds and a Great Blue Heron rookery...these are being degraded and displaced due to development and erosion”

- “The importance of traditional names [First Nations], they create respect for the environment and are passed on to children- they should be taught in schools”
- “Issues of private vs. public land ownership (TFL licenses), Issues of Land claims” (Lake Cowichan)
- “We have issues with ‘live aboards’ and pumping directly into our watershed, we would like to be able to harvest shellfish here but they require a pristine habitat in order to thrive”(Cowichan Bay)
- “We have second largest estuary on the island and right in the middle of our estuary management plan is a mill...it is legislated by the province and is well done, however it does not keep up with the times” (Cowichan Bay)
- “A resistance to greening the community is coming from a lot of the wealthy residents on the foreshore who want to build retaining walls to deal with erosion and run-off issues” (Cowichan Bay)

### 11. CLEARLY DEFINED PATH

Because a circle route is defined by its circular route, the path in which the route follows must be clearly identified so users do not lose track of where they are going. The Pacific Marine Coastal Route lends itself to some fantastic off-route exploration opportunities, but signage needs to be clear to redirect people back onto the route. The accessibility of pristine lakes, old-growth forests, spectacular ocean views, agri-tourism operations, a historic trestle, numerous wineries, extensive trail networks and a variety of small tourism operations makes the PMCR ideal for side routes and exposure to areas just off the main route. These attractions add interest and contribute to the sustainability of the PMCR as visitors can drive the route more than once and have a unique experience each time. Clearly defining the route also allows stakeholders to give clear direction to and from their own operations to ensure visitors can access the products offered.

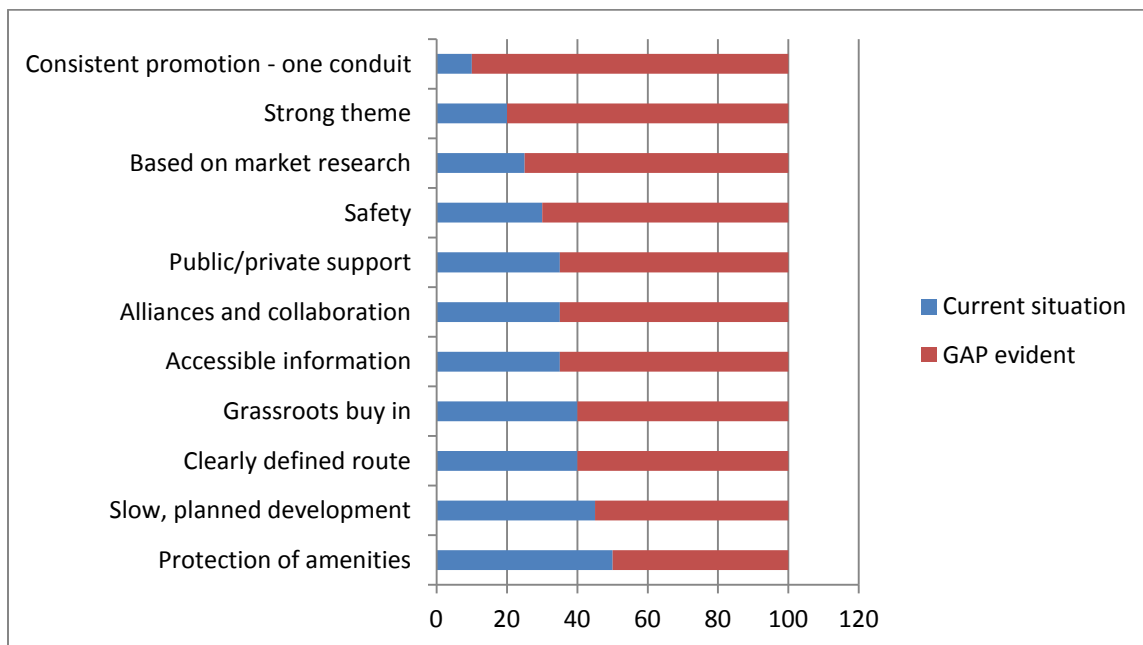


Figure 5: Summary of Gaps Identified in the Development of the Route

## DISCUSSION AND RECOMMENDATIONS

Based on the observations of the study team and understandings of relevant literature, the research team has identified factors of success for circle route development.

**The Pacific Marine Circle Route largest gaps appear to be in the promotion of a consistent and clear message and safety.** Along with this, many possible themes have been identified from organizations within communities, but consensus has not been reached on what that theme (or themes) will be. While individual regions have conducted market research and understand their visitors, there is no clearly defined target markets identified for the route. There is a **need to initiate market research in the region on the current users** of the PMCR to understand the nature of the experience. This will help in form strategic planning and the identification and targeting of specific markets for the route.

While there is an incomplete understanding in the region about the early origins of the route, recent grassroots initiatives to identify stakeholders and collaborate are emerging. This is a positive evolution as research has shown that a ground-up approach is a key factor in the success of circle routes. As this group evolves, **there is evidence of the need for a unified voice for the route** which may indicate the need for a governance model to emerge. The route is not just a set of signs and map for visitors, and as such, it there is work to be done to develop a strategy for the route. This process, if done with ample buy in from diverse stakeholders, will help clarify the route and obtain buy in for its future development. As outlined in the literature, this strategy should be guided by a set of principles, lead by a credible entity and build in a process to measure success along the way. There should be additional efforts to **expand the traditional tourism stakeholder groups** (marketing organizations and businesses) to engage in dialogue with residents of the communities on route. The decision to be or not to be part of the route was not something that was afforded to communities in the decision making process. There appears to be some resistance among certain communities on route, therefore **concerns should be heard and the ability to opt out of being promoted as a stop on route should be explored.** While there is resistance to the circle route from some communities, there is a lack of awareness about the route among others. **Efforts to raise awareness about the route and the impacts associated to its development should be done**, otherwise operators will not be able to deliver on the experiences being promoted. The circle route is in its infancy. Slow progression in the evolution of the PMCR will allow for resident buy-in to occur at various stages throughout.

Safety is an issue that is being discussed within a number of communities on the PMCR, and the attention given to this issue will have consequences for both residents and visitors to the area. Tied to safety is the need for clear signage and definition of the route so users can be confident in their travels throughout the region. The route is being promoted as a relaxing trip that is possible in one day. **This should be questioned, and according to the research team, changed.** The trip is not relaxing due to the nature of the roads on route, and we would question why anyone would want to promote a trip that

Efforts to raise awareness about the route and the impacts associated to its development should be done, otherwise operators will not be able to deliver on the experiences being promoted.



does not include an overnight in one of the rural communities on route. If it is a diversification strategy, then money from visitors will need to be spent along the route on accommodations and food. Slowing people down to take advantage of the various sites will allow this to occur.

In closing, the research team identified a number of gaps (some large, some small) to be considered in the future development of the Pacific Marine Circle Route. Based on the literature reviewed, the observations conducted in the field, and the infancy of its development, the PMCR and its stakeholders are well-positioned for success.

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## Appendix A: Itinerary of the Group

October 24, 2011 –

Van #1 - Lake Cowichan Visitor Information Center (1), Town Hall (3), drove to Port Renfrew and stopped at Tall Spruce, Lizard Lake Park, drove through Port Renfrew to form first impressions, out to Botanical beach for a hike, then drove down to resort for the night (Point No Point Resort). Total people connected with 4.

Van #2 – Before Visiting the Lake Cowichan Visitor Information Center (1), the exploration of the Lake Cowichan Museum took place (1), a visit to Town Hall for lunch took place (3), later there was a visit to Avatar Grove (2) in which the scenery was explored before making way to Point No Point Resort. Total People connected with 7.

October 25, 2011 –

Van #1 - Drove to Jordan River (1) to discuss circle route, then onto Port Renfrew. One group to the Hotel (1), then the Coastal Café (1), one group toured around marina and community (1). Later drove back to Sooke to connect with the visitor information center (2), then on to the Charters Salmon Stewardship Center (2) and then to Sooke Potholes. Back to stay at accommodations (Oceanside Wilderness Inn). Total people connected with 8.

Van #2 – Drove into Sooke to discuss the area with four stake holders over coffee (4), after this the exploration of the T'Sou-ke First Nations Reserve (2) where the examination of the Solar Panel Project was looked at and discussed. After this the group continued on to the Sooke Harbour House to take the natural amenity in and to walk the Whiffin Spit (2). Back to stay at accommodations (Oceanside Wilderness Inn). Total people connected with 8.

October 26, 2011 –

Van #1 - Drove to Mill Bay and stopped on route at Kinsol Trestle, Trans Canada Trail, Shawnigan Lake, Cobble Hill, Merridale Cidery, EcoFarm, Cherry Point Vineyard (1), and Mill Bay Ferry, before going to Rosebank Cottages for lodging. Total people connected with 1.

Van #2 – Drove to Mill Bay stopping at Gold Stream Provincial Park (5), Bamberton Park, the Tourist Center and the Chamber of Commerce of Mill Bay, before exploring the Kinsol Trestle. Staying at the Rosebank Cottages for lodging. Total people connected with 5.

October 27, 2011 –

Van #1 Drove to Victoria to the visitor information center (2), explored downtown, headed back and observed signage for the route. Headed up through agricultural land near Cobble Hill and Duncan. Stopped at Corner Store in Glenora, Glenora Farm, Foxstone Stable, Maplebook Meadows, Twincreeks Bed Bale and Breakfast, downtown Duncan and wineries. Stayed at Warm Rapids Inn and Stone Soup Inn – dinner at Stone Soup Inn. Total people connected with 4.

Van #2 – This leg of the trip there was exploration through the Cowichan Valley with stops at Arbutus Ridge Golf Club (2), the Cherry Point Nature Observation Park, Cowichan Bay Maritime Center (2), a walk around Cowichan Bay (1), before visiting Providence Farm (2) and the Tea Farm (2). Stayed at Warm Rapids Inn and Stone Soup Inn – dinner at Stone Soup Inn. Total people connected with 11.

October 28, 2011 –

Van #1 Worked at Warm Rapids Inn, proceeded to Duncan, then visited the Visitor Center (1), then proceeded to Qu'watsun Culture Center (1). Total people connected with 2.

Van #2 Worked at Warm Rapids Inn, drove into Duncan, then to Vancouver Island University campus (1), the recreation complexes in Duncan, the Forestry Discovery Center (1), Somenos Park, Chemainus, and Ladysmith. Total people connected with 2.