



# Pacific Marine Circle Tour

Gap Analysis Study: October 2011



VANCOUVER ISLAND  
UNIVERSITY

## Research team:

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# What's on the horizon?

- ▶ Regional rural development approaches – the potential of ABRD (amenity based rural development)
- ▶ The role of tourism in this approach
- ▶ Circle routes as a strategy in ABRD
- ▶ Our study – how did we do it and what did we find?



# What are the dominant agendas in rural development policy?

- ▶ Repopulation of areas
  - Attracting young families
  - Immigrants
- ▶ Attracting investment
  - Enhancing climate for small business success
- ▶ Addressing aging infrastructure and services

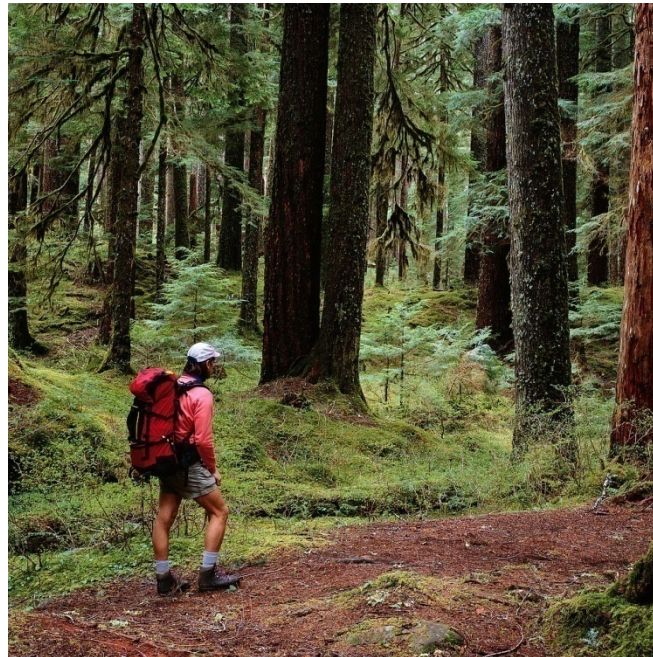




# Paradigm shift in rural development

From

- ▶ Sectoral approach
- ▶ Subsidies
- ▶ Places of *production (resources)*
- ▶ *Export goods*



To

- Territorial approach
- Investments
- Places of *consumption (amenities)*
- *Import people, ideas and investment*

# Where is this coming from?

- ▶ Rural areas are not homogeneous.
- ▶ Despite overall trend of decline – some are growing...
- ▶ This growth is highly correlated to the presence of amenities which are speculated to drive rural development.



# Amenity based rural development

- ▶ ABRD is a strategy to allow rural areas to develop using their amenities as key drivers.
- ▶ Amenities are the things that make rural areas attractive places to visit, live, work and invest.
- ▶ Place-based strategy requiring regional collaboration as natural, cultural and system amenities are not “community based” but regional in nature.



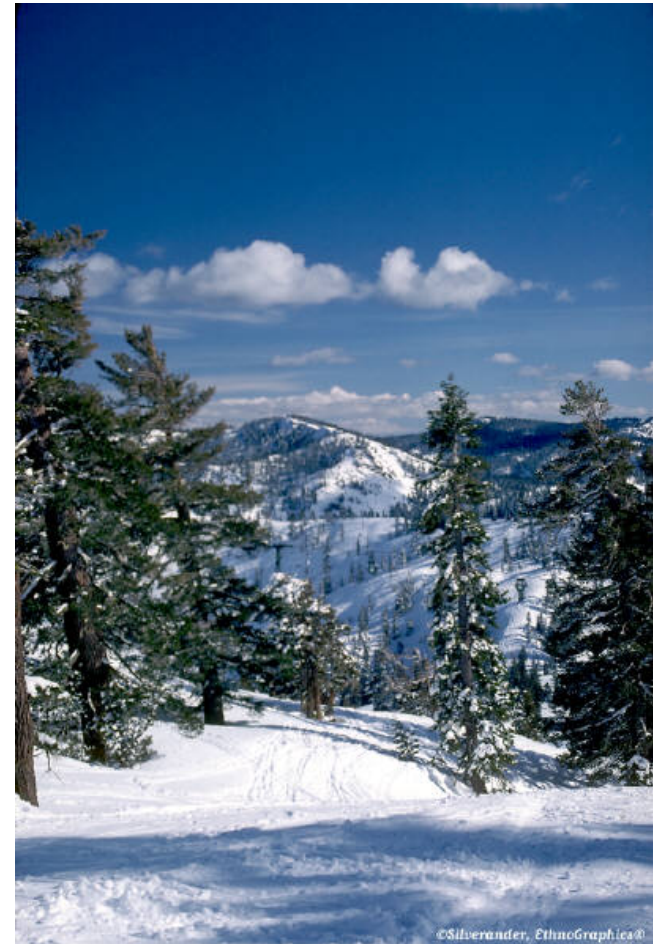
- ▶ The use of valued amenities in rural regions to:
- ▶ 1) **promote the attractiveness** of rural areas for **tourism, relocation and investment,**
- ▶ 2) **protect** the future value of amenities, and
- ▶ 3) to **create economies** (directly and indirectly) from the presence of amenities.

## Requires actions such as:




# The three audiences for ABRD

- ▶ Visitors – attracted to experience the amenities and contribute to local economy;
- ▶ Residents – attracted to live near the amenities and for overall quality of life;
- ▶ Investors – attracted to create economic value from the amenities – directly or indirectly.
- ▶ There is a pattern to who comes first – visitors, then decide to settle and set up shop.








Circle routes are a strategy to promote regions to outsiders to attract them for a visit, to relocate or to invest...

▶ **The Issue?**

- Existing research is not being utilized in the development of successful tourism routes
- There is a lack of a unified approach to the development of tourism routes
- Need to understand the key factors of success, the benefits and the challenges of route tourism



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- A close-up photograph of a bright red lobster, showing its legs and claws. The lobster is the central focus, with its vibrant red color contrasting against a blurred background of more red. The image is used as a background for the slide.
- ▶ Sustainable tourism can be defined as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (United Nations Environment Programme and World Tourism Organization, 2005, p. 12).
  - ▶ “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).



# Factors for Success

At the base of the diagram is the need to establish quality and purpose-designed visitor attractions and services that are tailored to meet the needs of the drive market.

Every shire/town must focus on developing a distinctive image/theme which best represents its competitive advantage.

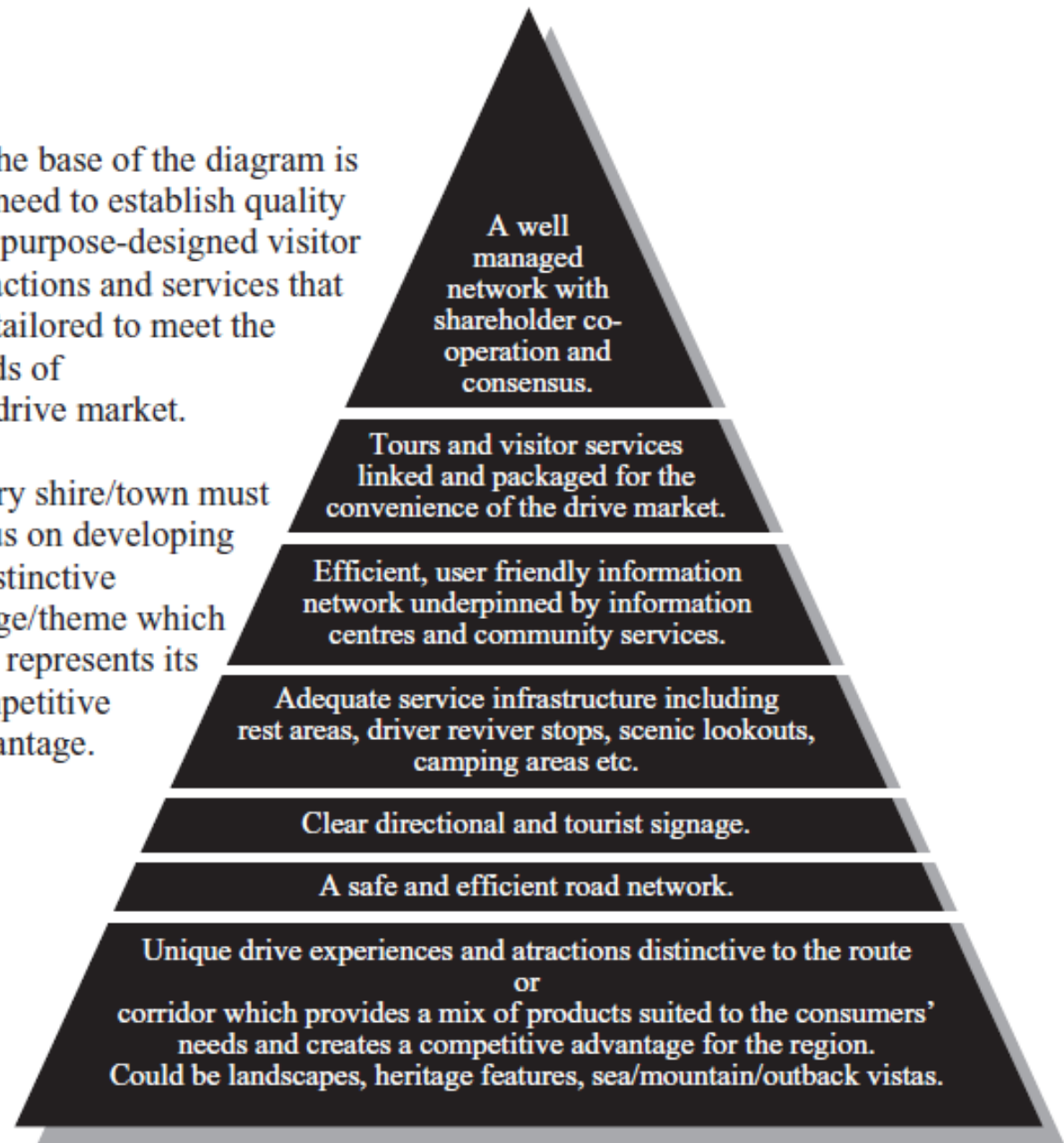


Figure 1.1 Features of Successful Themed Tourism Routes (Hardy, 2003, p. 319)

# The purpose of this case study

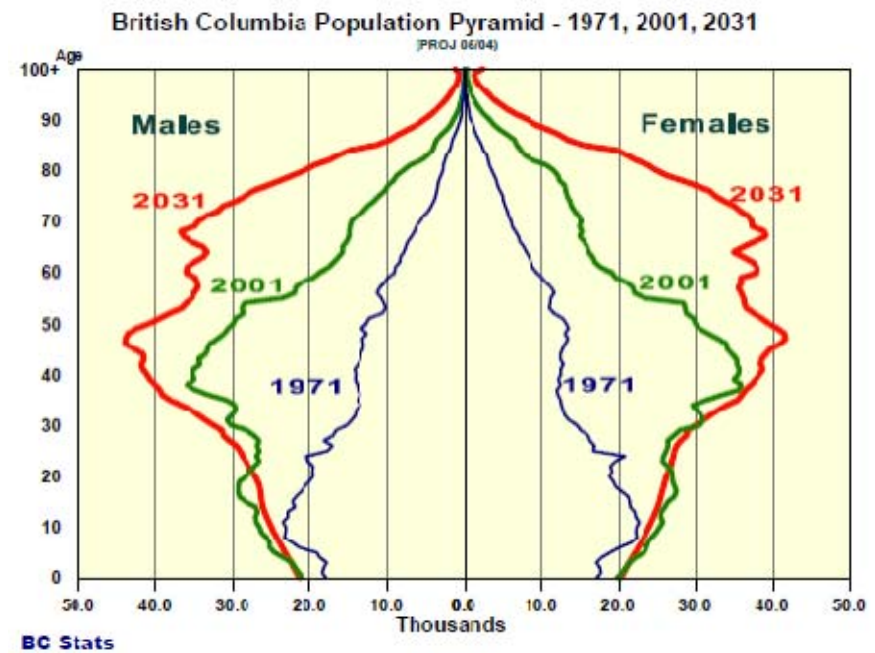
To provide insights for stakeholders in the development of the PMCR including:

- a) Identification of the natural, cultural and system amenities along the route which have value for local residents and visitors,
- b) Assessment of the current quality of the tour experience as delivered by the range of stakeholders and communities involved,
- c) Analysis of 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 the PMCR.



# Case Study Context

- ▶ Vancouver Island's population is getting older
- ▶ Rural populations are increasing
- ▶ Increase due to close proximity to urban centres and various types of amenities



# Case Study Context

- ▶ Rural communities along the route are diversifying from reliance on resource extraction industries
- ▶ Service sectors such as retail, accommodation and food/beverage now primary industries





# Case Study Context

- ▶ The paving of highway 14 created 3 things:
  - The Pacific Marine Circle Route in 2005
  - A route that allows for rental cars to be used
  - Unprecedented collaboration between communities and stakeholders along the route



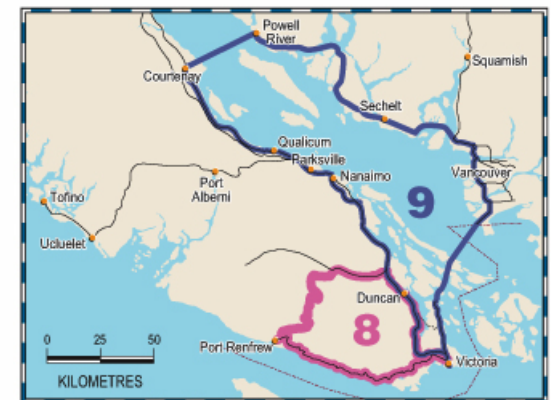
# Context

- ▶ Circle routes work as a collaboration between the Ministry of Transportation and Tourism BC
  - 9 Circle routes in BC
  - Connect many rural communities and showcase rural amenities
  - No complete history is known about nature of circle routes



## LEGEND

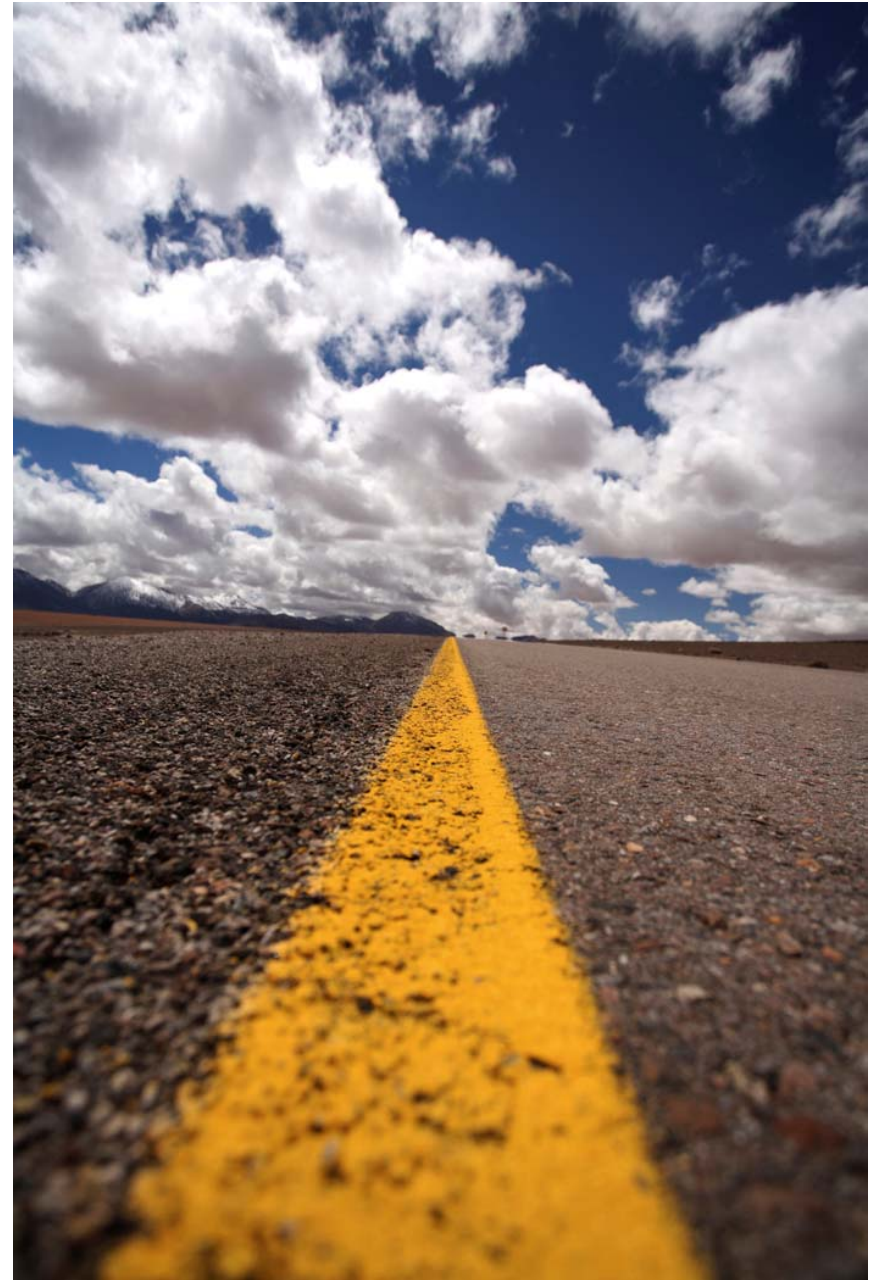
- 1 Hot Springs
- 2 Great Northern
- 3 Heritage Discovery
- 4 Coast Cariboo
- 5 Mountains & Vineyards
- 6 Lakes & Trails
- 7 Ranchlands & Rivers
- 8 Pacific Marine
- 9 Coastal





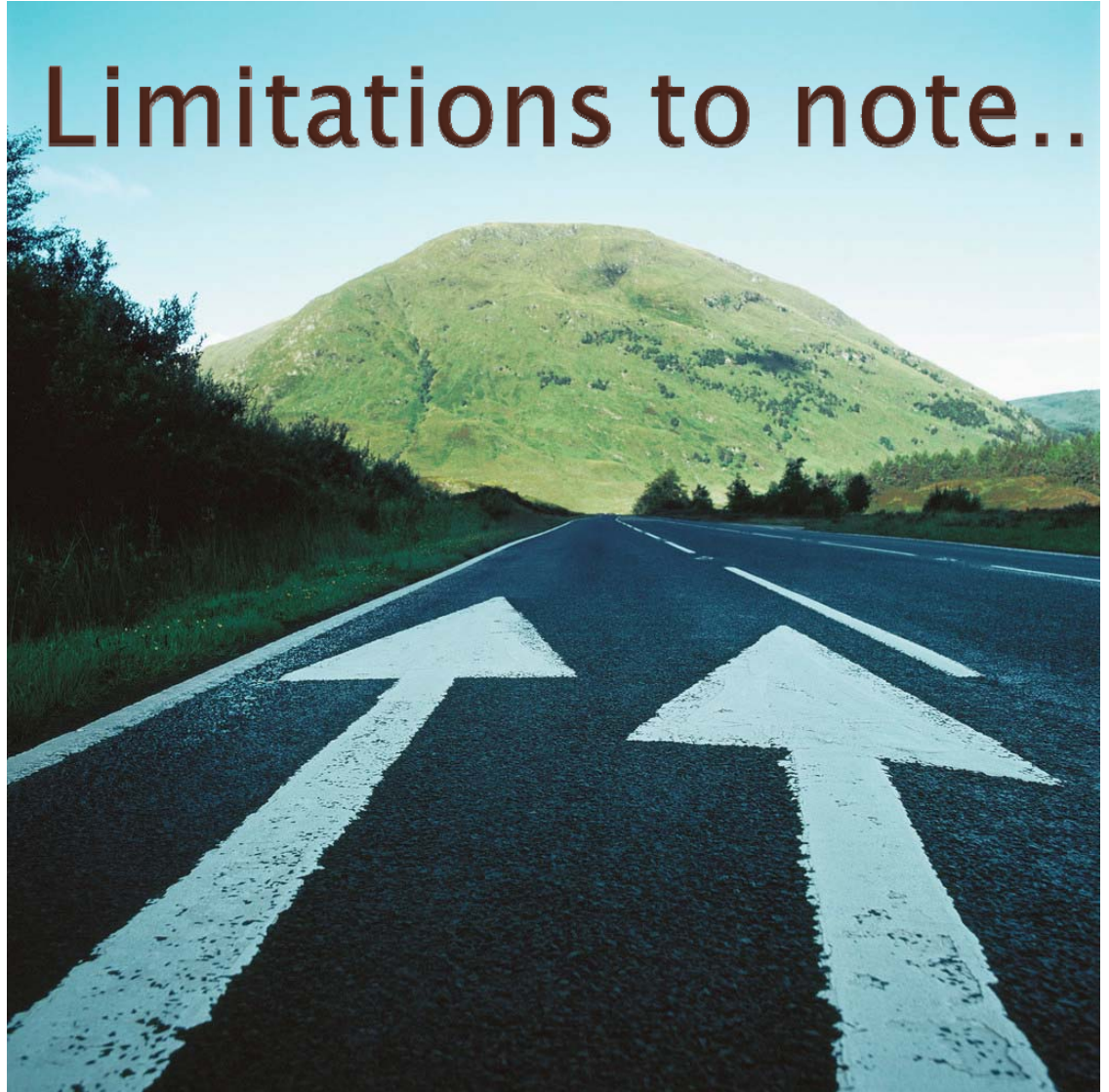
# Methodology

- ▶ Phases
  - ▶ Brainstorming
  - ▶ Preparation
  - ▶ In field work Oct 24-28
- ▶ Methods
  - ▶ Case study
  - ▶ Secondary documents
  - ▶ Observation
  - ▶ Discussions
  - ▶ photography
- ▶ Tasks
  - ▶ Context
  - ▶ Review marketing
  - ▶ Lessons learned elsewhere
  - ▶ On route for 5 days
  - ▶ Compare our experience



- ▶ Time of year (late October)
- ▶ Weather
- ▶ Opposite way of the suggested route
- ▶ Two separate experiences (due to two vehicles)
- ▶ Info and Visitor Centers closed for the season
- ▶ Only five days and not able to gain all perspectives

## Limitations to note..





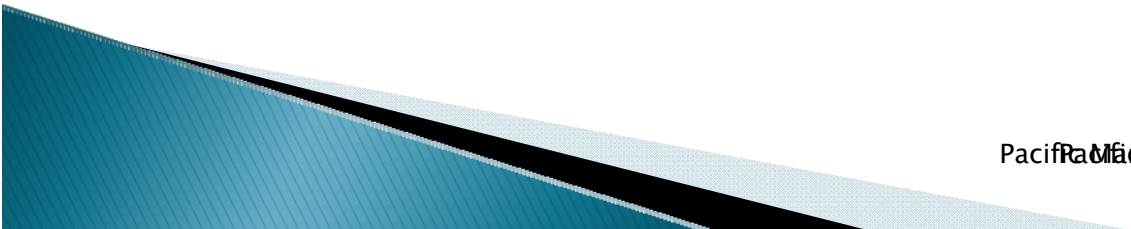
# Experience Highlights

- Opportunities to be near water
- Trail Systems
- Friendly locals
- New amenities like:
  - Salmon Centre in Sooke
  - Kinsol Trestle
  - Solar Panel System in T'Sou-ke First Nation
- Amazing Food
- Fall colours



# What amenities are promoted on the route?

- ▶ Natural Amenities
  - Beaches
  - Old Growth Forest
  - Parks & Trails
  - Marine Life
- ▶ Cultural Amenities
  - Museum
  - Local Food
- ▶ System Amenities
  - Roads





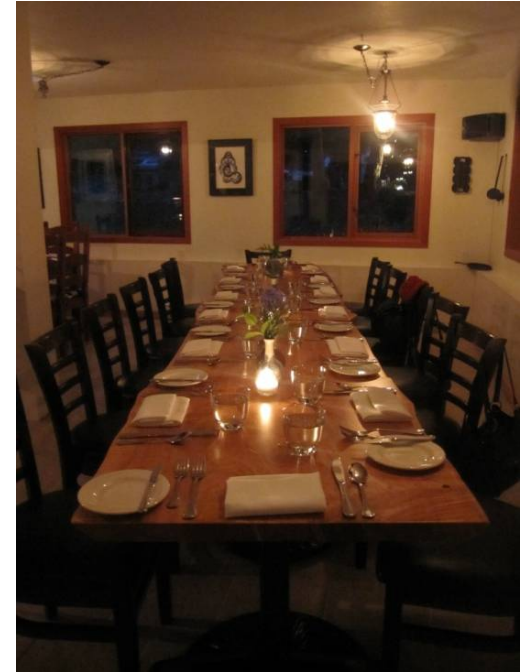
# Promotion of the experience...

- Enjoy the;
  - Relaxing drive – do it in a day!
  - Fun Outdoors (recreational/leisure)
  - Attractive views
  - Delicious Local food (agriculture)
  - Creatures of the sea and land
  - Culture of First Nations
  - History
  - Arts & Culture



# Our Actual Experience

- ▶ 5 day drive
- ▶ Poor road conditions (some areas)
- ▶ Other amenities and side-route potential
- ▶ Diversity of experiences
- ▶ Emphasis on water but mostly trees?
- ▶ Friendly people
- ▶ Closed amenities (due to season)
- ▶ Poor signage (some areas) and lack of clarity on what the “route” was
- ▶ Great accommodations (B&B’s & Resorts)





# Gaps in promotion

- ▶ Length of the trip – promoted as a day trip!
- ▶ Relaxing??? *Which part?*
- ▶ Inconsistencies in promotions and lack of clarity
- ▶ Avatar Grove – *promotion before ready?*
- ▶ Pacific Marine or Big Trees? *Have to make efforts to get off the road to see amenities*
- ▶ Strong nature based theme – cultural amenities not standing out as much yet. Potential for FN experiences is strong.
- ▶ Print materials and signage not always consistent... *(frustration and poor experience?)*

# Findings for the Supply side of Modified Gap Analysis

- ▶ Several key factors of success have been identified from the literature in the development of circle route tourism which have been used in this study to identify supply gaps in the PMCR

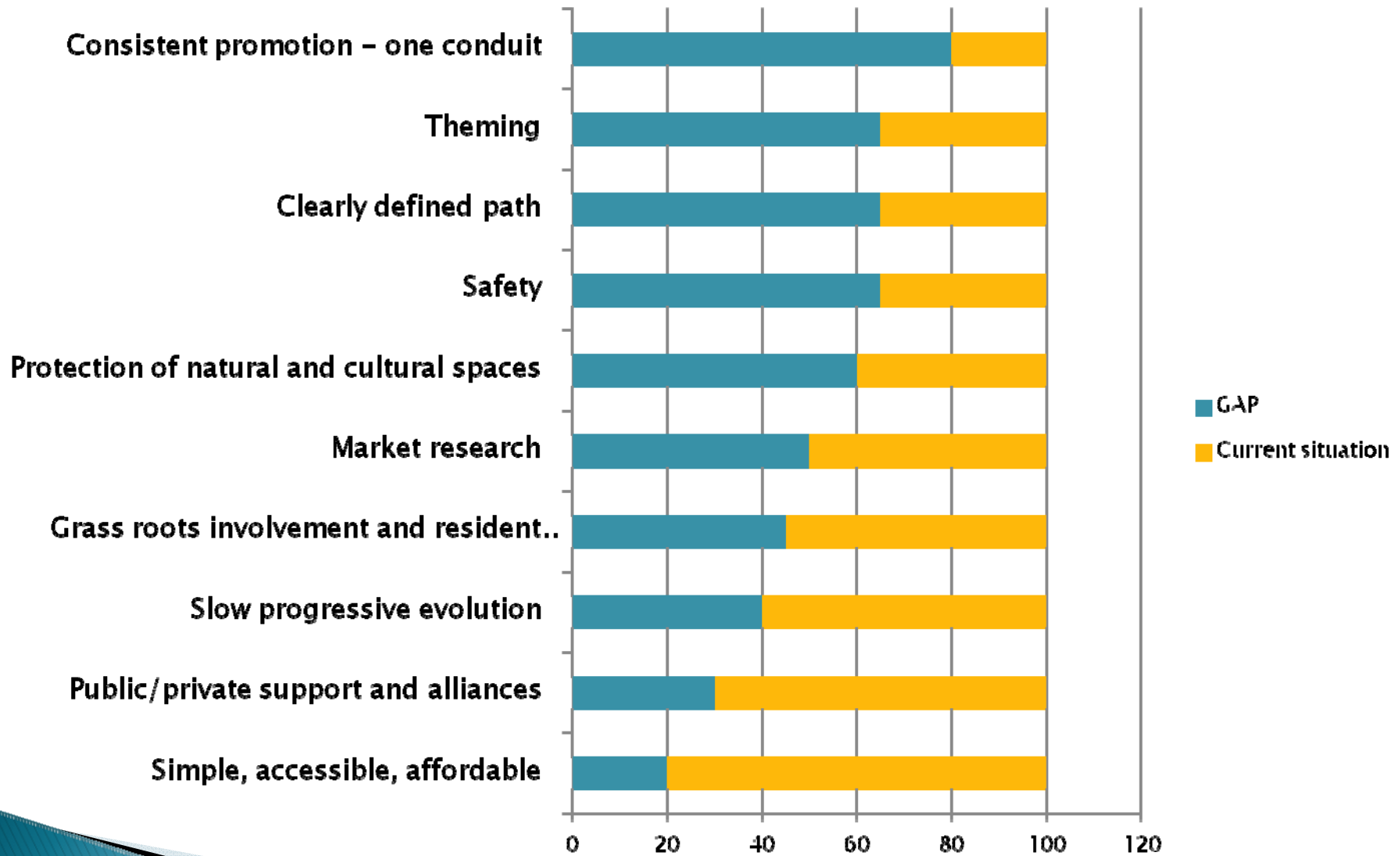




# Factors of Success Identified from multiple case studies include:

1. A Clearly defined path
2. Protection of cultural and natural spaces
3. Making it simple accessible and affordable
4. Theming
5. Safety
6. Promotion – Having one main conduit of information
7. Market Research
8. Slow progression in evolution
9. Public/private support and strategic alliances
10. Grass roots involvement/resident buy-in
11. Identification of what tourism development/circle route means to communities

# GAP analysis – factors for success vs. current situation





# Discussion

## ▶ Creation & promotion of PMCR

- A diversity of understanding was found amongst the stakeholders to what tourism and circle route development is. Some had a deep understanding of the costs/benefits, others are resistant to and/or unaware of the route.



- **Grassroots involvement, resident buy in & capacity building**
- There were significant gaps observed between communities
- Some communities are in support while there are others that only see the costs and others do not even have knowledge of the PMCR as they are situated in high traffic corridor areas (East west?)

# Discussion continued...

- Public/Private support and partnerships, strategic alliances
- A significant number of statements from stakeholders indicate that a governance model is needed to allow all voices to be heard
- Slow progression in evolution
- Slow progression has been shown to be a factor of success in the development of the PMCR as it has enabled significant stakeholder “buy in in certain areas such as Lake Cowichan and Sooke





- Significant Market Research
- Many stakeholders along the PMCR route seem to have a fairly good understanding of who their visitors were, however at this stage the route is not being developed with an understanding of unique target markets based on research data



**Promotion –one main conduit of information inconsistencies in terms of amenities and nature of experience being promoted, no one identifiable detailed resource for route)**



## Safety

- A significant gap that was observed was lack of signage, road conditions and information provided, lack of cell service, no safe pull off areas. This issue was brought up consistently in all communities and from a diversity of stakeholders

## Theming

- A significant gap was observed in terms of the diversity of ideas brought forth in each community (and within communities). Stronger theming is needed. Name issues???







## Protection– cultural and natural spaces

- There were many consistencies in stakeholders valuing the importance of these as amenities however there are still issues with regards to First Nations land claims and areas of governance over certain areas in particular watershed areas and old growth forest.



# Final thoughts:

1. Continue to engage and gain buy in of all stakeholders;
2. Understand amenities, protect and promote them for long term benefits of all communities;
3. Theme the route, take care of visitors and define who the desired markets are for the communities on route based on research;
4. Develop more consistent promotions that reduce the gaps in expectations and reality;
5. Educate and familiarize others on the route;
6. Limit promotion as a day trip
7. Move slowly, set realistic expectations and monitor success based on visitor experience and community benefits.

