

OUR PATH TO CREATING AN EXCEPTIONAL HIKING EXPERIENCE NETWORK

Hiking Tourism Master Plan

Vancouver Island and Coast Region



2016



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Our hiking tourism master plan lays out a path to develop our network of exceptional hiking experiences



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Thank you!

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Executive Summary

The Vancouver Island and Coast (VIC) Region which includes Vancouver Island, Gulf Islands, Broughton Islands, Discovery Islands and the Sunshine Coast offers a wide range of hiking experiences. However the hiking tourism potential of the VIC Region has yet to be realized. Hiking is becoming a popular activity that supports both the touring market as well as destination hikers. Recent research conducted on Vancouver Island suggests that hiking ranks highly as a preferred activity for visitors to the VIC Region. Supporting studies also show significant increase in adventure travel, which includes soft adventures such as hiking and backpacking. Hiking in British Columbia continues to be an important activity of choice for visitors coming to the Province. Many communities and local recreational groups within the VIC Region recognize the potential positive economic benefits of hiking tourism within their local communities. Many of our stakeholders are working on local initiatives to improve hiking trails infrastructure and experiences to satisfy increasing demand. The tourism strategies of Destination BC and Tourism Vancouver Island also support the development and improvement of hiking trail infrastructure, resulting in a synergy of goals and activities.

The Hiking Tourism Master Plan examines the potential for hiking tourism within the VIC Region. Building on the Phase 1 inventory of 250 Trails, the Master Plan looks closely at the hiking experiences available and begins to match traveler needs to the hiking experiences that we offer. Reflecting the best available research, this plan identifies opportunities to grow our network of exceptional hiking experiences. The VIC Region has the potential to become one of British Columbia's, and the country's, most exceptional hiking destinations.

As a joint effort between Tourism Vancouver Island and our Hiking Tourism partners representing industry, academia, business, Provincial and Regional Governments, trail associations and First Nations perspectives, we have come together to promote the VIC Region as a destination for hiking tourism through the recommendations of this Master Plan. This plan provides the foundation for implementation in Phase 3.

Highlights and Key Findings

The following report provides a detailed analysis of the hiking tourism market as it relates to both the touring market as well as destination hikers, with a clear understanding of the travelers who are motivated to come to hike, what their needs are and what we need to do to strengthen our hiking trail experiences to better align with those needs. The study also reviews how travelers are motivated, how they find information about hiking in the VIC Region and what we can do to create better awareness around the experiences we offer and compel visitation.

Input from our hiking tourism partners, together with our market research, demonstrated that there is a desire to create a network of exceptional hiking experiences. In order to achieve our hiking tourism potential, we will need to:

- Improve our Trails Infrastructure.
- Offer trip planning logistics—packages.
- Improve trails information and wayfinding.
- Create interpretive programs.
- Increase accommodations choices and supply and integrate with hiking trails.
- Create or enhance amenities such as transportation and other services (toilets, restaurants, retail, tours, attractions, events, and guiding).
- Enhance and Coordinate branding and marketing.
- Coordinate stakeholders.
- Coordinate management and funding resources.

Strategies and Recommendations:

The strategies and recommendations we have put forward are driven by market expectations and are focused on realizing our potential to elevate current hiking experiences in the VIC Region to become a top Canadian destinations for year round touring exploring and destination hiking.

Our competitive advantages include the following:

- The VIC Region offers an abundance of hiking trails to choose from, with a variety of experiences, for the novice to the experienced hiker, which presents an opportunity as well as a challenge;
- A key competitive advantage and opportunity for the VIC Region to be distinctive is our abundance of coastal destinations;
- We offer year round hiking destinations.

To achieve our Hiking Tourism potential, TVI and our Hiking Tourism partners will implement the following key strategies.

1. Enhance existing hiking experiences to become “exceptional” hiking experiences;
2. Create an interpretive, story-telling framework;
3. Build awareness of the “exceptional hiking experiences” network;
4. Maximize the positive benefits of tourism while minimizing the negative impacts on the environment, First Nations and host communities;
5. Maintain an up-to-date inventory of hiking trails and trails attributes database;
6. Ensure “exceptional hiking experiences” are well managed and safe;
7. Collaborate regionally to negotiate private land access and create partnership agreements;
8. Provide the right accommodations and amenities to support our Exceptional Hiking Experiences Network.
9. Make it easier to access the “Exceptional Hiking Experiences Network”;
10. Establish sustainable sources of funding.





1. Introduction

Developing a culture around hiking tourism is not an easy feat. It starts with creating a sense of place – of knowing where you are in the world. There are a number of factors that contribute to placemaking, including developing a social and cultural system, built around tradition and the history of belonging and understanding of a landscape, its people and its culture. Hiking is deeply entrenched in the Vancouver Island and Coast (VIC) Region, as both a means of mobility and a way of exploring its nature, culture and communities. Hiking connects people to place and to each other through a common journey. Today, hiking as an activity and as a tourism experience, is growing rapidly, for various reasons, including escape and relaxation to high adventure pursuits. Our VIC Region's unique landscapes, our climate and our peoples make hiking in the VIC Region unlike hiking anywhere else.

Some hikers are motivated to travel to destinations solely because of their hiking experiences while others travel to their destination for other reasons but engage in hikes as a secondary motivation. Whatever the motivation, hiking offers visitors the opportunity to experience the uniqueness of the VIC Region while providing many positive benefits to host communities.

Though the VIC Region has a strong supply of hiking experiences, its true potential to be a world class hiking tourism destination has not yet been realized. Recognizing the unmet potential, Tourism Vancouver Island and its hiking tourism partners have developed this master plan to provide direction for hiking tourism development, marketing and management for the next 10 years. It is a framework in which tourism industry partners can work collaboratively towards achieving a shared vision.

This study focuses specifically on hiking on Vancouver Island, Broughton Islands, Discovery Islands, Gulf Islands and the Sunshine Coast. Although cycling and mountain biking are also growing as specialized experiences and sometimes share the same trails as hikers, this study remains focused on hiking as an activity and does not address their particular needs.

Master Plan Scope:

Activity—Hiking

Geography—Vancouver Island, Gulf Islands, Broughton Islands, Discovery Islands & Sunshine Coast (Vancouver Island Region)

Land—

- Provincial Parks and Protected Areas & Crown Lands
- National Parks
- First Nation Reserves and Treaty Settlement Lands
- Municipal Government Lands
- Private Lands including Private Timber Lands

1.1 Destination Management Planning

Destination Management Planning considers how to plan, develop, manage and market our greatest tourism assets; how to create a brand that reflects the diversity of our VIC Region; how we can attract the level of investment required to enhance our tourism industry and how we can compel visitors to experience the destination. Destination Management Planning is a collaborative process in which tourism organizations, private land owners, government and community leaders collectively plan for the future of and manage a destination based on a shared vision. Destination Management Planning:

- Takes advantage of rural and small-town locations to promote hiking tourism opportunities that will strengthen economic development in ex-urban locations around the VIC Region.
- Helps to prioritize economic development through data driven opportunities within the VIC Region.
- Takes a long-range, strategic planning approach for developing the hiking experience in the VIC Region.
- Strengthens access, support, and marketing that will help to develop a regional hiking brand, and increase the number regional and international visitors.



Figure 1 Destination Management Planning Tool
Source: World Tourism Organization, 2007

1.2 Project Focus & Planning Process

As a destination, we offer visitors a wide range of hiking experiences, however; many stakeholders throughout the VIC Region agreed that the true tourism potential of hiking has yet to be realized. There is a real opportunity to enhance visitor experiences through our trails and to improve hiking tourism planning and management as well as elevate the effectiveness of tourism marketing that will put us closer to realizing this potential.

Various organizations and governmental departments recognize that there are common opportunities for hiking tourism and have begun work on the development, enhancement, and collaboration of regional trails networks.

Committed to growing hiking tourism, TVI established a three phased approach to lead the VIC Region forward:

- **Phase 1** – Development of an inventory of hiking trails and experiences in the VIC Region
- **Phase 2** – Development of a Hiking Tourism Master Plan
- **Phase 3** – Implementation

For the purposes of this study, a ‘hiking trail’ includes both a contiguous individual trail as well as a “hiking destination systems” where there may be a dense network of hiking trails. To be included in the project the trail must allow hiking, walking and/or scrambling and it must be, or have the potential to be, attractive to tourists who visit the Vancouver Island Region.

PHASE ONE
Hiking Trails Inventory

Completed 2015

PHASE TWO
Hiking Tourism Master Plan

PHASE THREE
Strategy Implementation Development and Marketing

Building on the inventory of hiking experiences gathered in the Phase 1 study (2015) the master plan applies a destination management planning lens to match the type, location and market readiness of trails in the VIC Region with visitor demands in order to identify opportunities to enhance hiking tourism over the short and long term. Development of the master plan followed a four-stage process:

- **Stage 1** – Project Initiation, background research, and stakeholder consultation
- **Stage 2** – Hiking trails inventory analysis and destination analysis
- **Stage 3** – Opportunity analysis, Draft Tourism Master Plan, and stakeholder consultation
- **Stage 4** – Final Hiking Tourism Master Plan

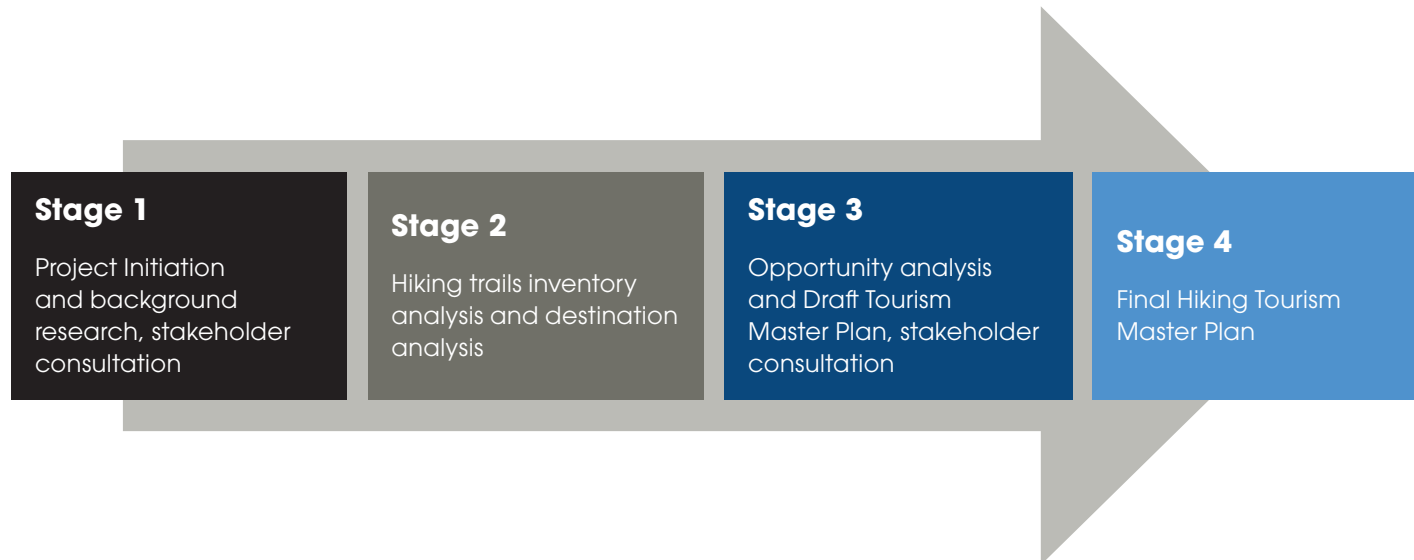


Figure 2 Hiking Tourism Master Planning Process

1.3 Project Engagement

1.3.1 Engaging Our Partners

Within the VIC Region, hiking trails are owned and managed by a range of trails partners, including First Nations, private land owners, not-for-profit trail groups, industry, along with local, regional, provincial and federal government agencies. Meanwhile, the visitor experiences our trails offer are marketed by local, regional and provincial destination marketing organizations. Its clear, realizing our hiking tourism potential will be dependent on strong partnerships, collaboration and ongoing support of our hiking tourism partners over the long term.

1.3.2 Engagement Tools

To enable our partners to meaningfully engage in the co-creation of the plan, a variety of engagement tools were used to meaningfully involve stakeholders including various levels of government, First Nations, hospitality, businesses, hiking trails groups and tourism representatives in the VIC Region.

1. **MindMixer**—January – February, 2016: 114 Unique Visitors and 813 page views with 66 Active participants.
2. **Stakeholder Interviews**—January – February, 2016; conducted with 16 stakeholders.
3. **Big Ideas Workshop**—March, 2016. Seventeen participants provided input on a Vision, Goals and opportunities.
4. **Draft Master Plan Workshop**—April, 2016. Twenty-Five participants in this workshop in Courtenay. A final survey of participant satisfaction with the draft master plan, its ideas and recommendations was distributed. Twenty-Three surveys were returned showing that most participants were supportive of the plan and its ideas. Comments were incorporated into the final master plan.

By the Numbers: Engagement Participation

MindMixer

Unique Visitors—MindMixer



Page Views—MindMixer



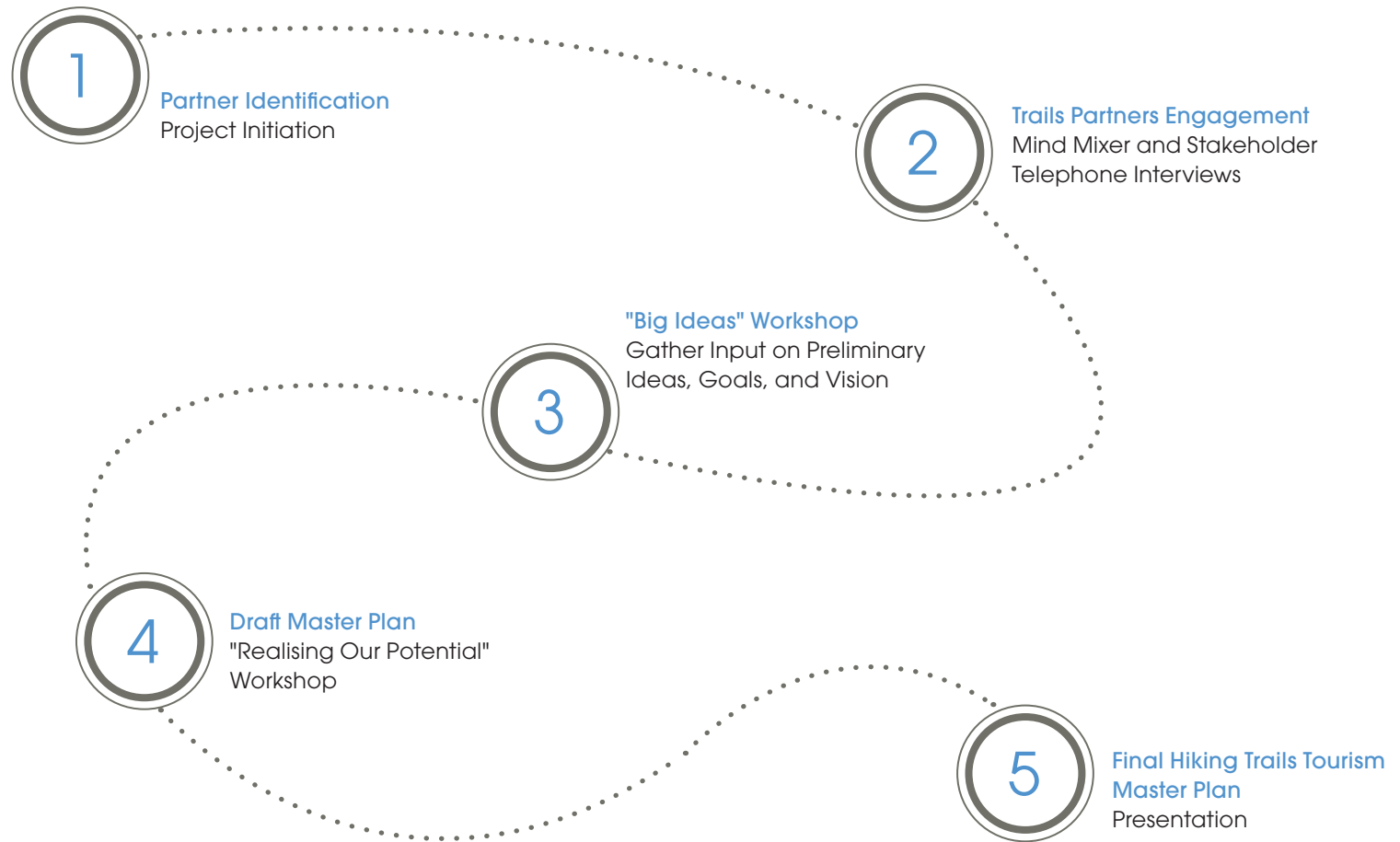


Figure 3 Master Planning Engagement Process

1.3.3 What We Heard

Feedback through MindMixer, telephone interviews, the Big Ideas Workshop, and Draft Master Plan workshop provided valuable information from across the VIC Region and from a variety of local and regional stakeholders. Here is what we heard:

Common Barriers:

- Access to hiking trails and parks through private lands
- Limited funding
- Lack of a coordinated approach to managing, marketing and promoting hiking trails in the VIC Region

Opportunities:

- There are a number of hiking trail initiatives taking place across the VIC Region, all in varying stages of design development and implementation.
- There is substantial interest in seeing hiking tourism grow in the VIC Region.
- Offering multi-day, long distance hikes with supporting accommodations, transportation/equipment transfers between destinations
- Having a coordinated transportation network from arrival points (ferries, airports) to destinations and between destinations
- Develop and improve the supporting visitor accommodations, amenities and services. Integrate accommodations, amenities and services with trails in the VIC Region.
- Having a coordinated, regional marketing and promotions approach – a central repository for trip planning, access and transportation through the VIC Region for hiking and cross promotions that provide relevant and up-to-date information
- Partnerships and Agreements with private land owners and First Nations
- Having greater connectivity between hiking trails and trail loops



1.4 Shifting Focus – The Visitor Experience

“A tourism product is what you buy; a tourism experience is what you remember”¹. Our industry is shifting away from selling products and services to developing engaging, authentic and memorable experiences. As our tourism offerings progress up the experience spectrum (see Figure 4), our competitive position improves by presenting a stronger proposition to visitors seeking these experiences as does our ability to charge higher rates for the experiences. As a destination, we need to commit to embracing this shift and focusing our attention on experiential travel. This means that we will need to have a better understanding of what hiking experiences the traveler is seeking, as well as where and how we are capable of delivering the hiking experiences that meet the traveller’s expectations.

“Experiential travel engages visitors in a series of memorable travel activities that are inherently personal. It involves all senses, and makes connections on a physical, emotional, spiritual, social or intellectual level. It is travel designed to engage visitors with the locals, set the stage for conversations, tap the senses and celebrate what is unique”² in this region. Experiential travel presents an opportunity for our tourism industry to stimulate visitation by creating enticing experiences designed to attract travelers to special places, people and cultures within our communities and across our region.

This master plan looks deeper into the hiking experience in the VIC Region to see what hiking experiences we offer, what other attractions and services are needed and how we can package or enhance those experiences to differentiate our VIC Region and create a network of exceptional hiking experiences.

Tourism Product—what you buy
Tourism Experience—what you remember



What persuades a potential visitor to holiday in a particular destination is that destination’s ability to engage in unforgettable and truly inspiring experiences that touch visitors in an emotional way and connect them with special places, people and cultures.
(Hero Experiences, Queensland Tourism)

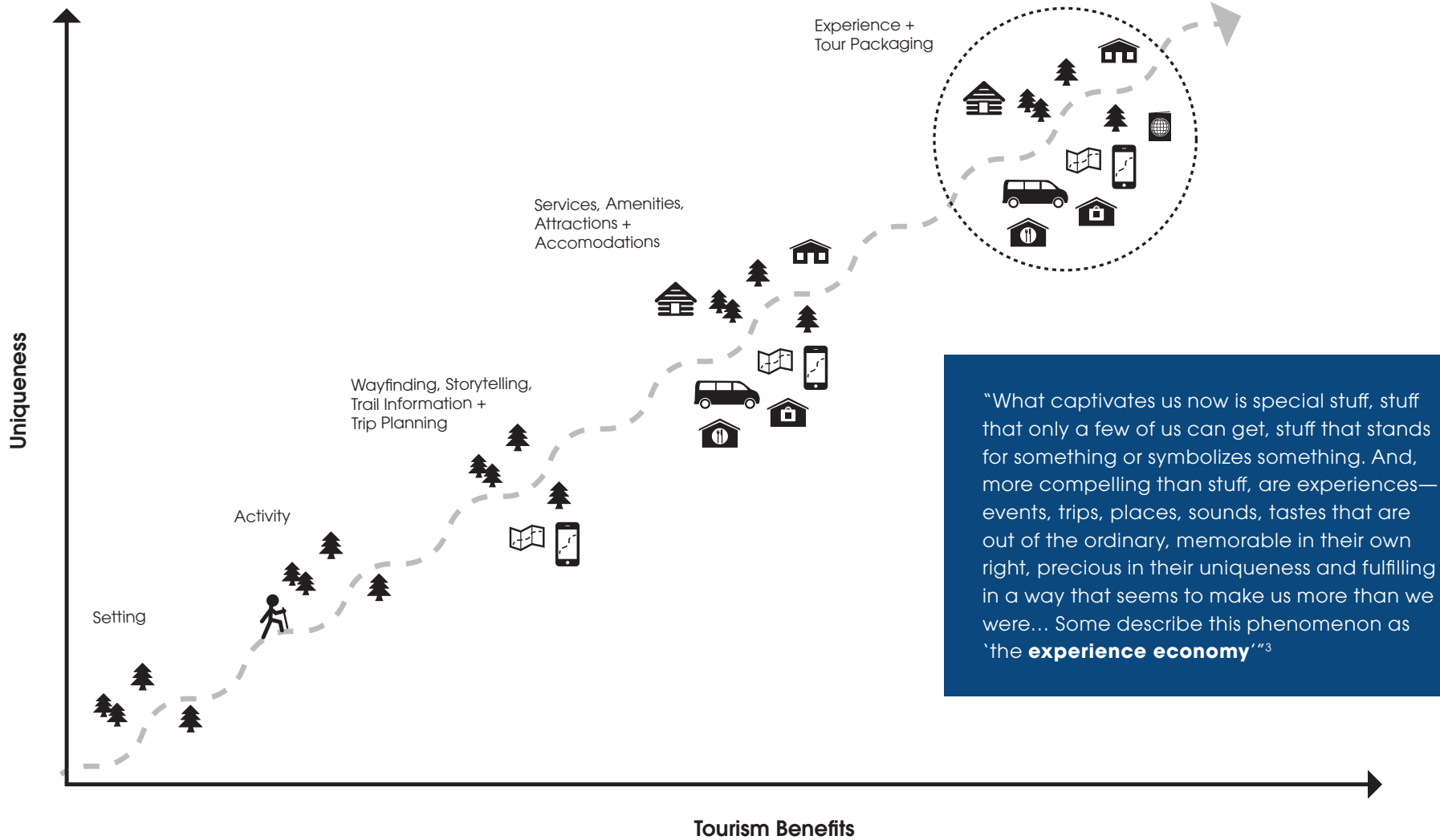


Figure 4 Hiking Experience Spectrum

(Experience Spectrum, Tourism Queensland – Adapted from Pine & Gilmore, 1998).

1.5 Policy & Planning Framework

NATIONAL	Government of Canada
	<ul style="list-style-type: none"> • Welcoming the World
PROVINCIAL	Government of British Columbia Policies
	<ul style="list-style-type: none"> • Destination BC – Sustainable Tourism • Canada Starts Here: The BC Jobs Plan • Gaining the Edge: A 5 year Tourism Strategy for BC • Aboriginal Cultural Tourism Blueprint Strategy for BC and BC Trails Strategy: BC’s Action Plan to implement a Trails Strategy • Various programs that promote health and fitness such as Healthy Families BC
REGIONAL	Regional Plans and Policies
	<ul style="list-style-type: none"> • Parks and Recreation Master plans • Strategic Plans and Trails Management Plans such as: <ul style="list-style-type: none"> – Alberni-Clayoquot Regional District – Capital Regional District – Cowichan Valley Regional District – Regional District of Nanaimo – And others

Tourism throughout the VIC Region is guided and influenced by several different policies, strategies and plans from the National to local level. Some are focused on tourism in general, while others describe a more comprehensive approach to policy planning that support active transportation, the health and well-being of the population and environment as a whole.

The intention of National and Provincial tourism strategies is to strengthen the tourism sector as a whole in order to open opportunities for economic development in all regions. High level policies touch on positioning ourselves relative to other markets, and identify the need for a coordinated approach to attracting tourism dollars. The BC Tourism Strategy outlines a 5 year strategy that builds on the already established “Super Natural British Columbia” brand, reinforced by the 2010 Winter Olympics. (See Gaining the Edge 2015–2018⁴).

Within outdoor adventure and eco-tourism experiences which British Columbia is well known for, hiking has been identified as a global activity and visitor trend that can be strengthened regionally to draw a range of visitors towards building a key world class brand and unique visitor experience. In addition, the touring market in BC has been identified as a key opportunity market where hiking is listed as one of the top activities visitors take part in.

The Hiking Tourism Master Plan will support and advance the “Trails Strategy for BC”. ⁴

Provincial policy has provided support for implementation of a Provincial trails strategy through an action plan framework. As a key theme in creating a world class visitor experience, recreation trails infrastructure for hikers, (as well as for other trail users) has been identified as a top priority. BC's sustainable trails network is founded on six key components according to the "Trails Strategy for British Columbia" (2012) that provide a planning and implementation framework for the development of the trails network over the coming years. *The BC Trails Strategy* supports other provincial initiatives, including:

- Canada Starts Here: The BC Jobs Plan
- Gaining the Edge: A 5 year Strategy for Tourism in BC, 2015–2018
- Aboriginal Cultural Tourism Blueprint Strategy for BC
- Various programs that promote health and fitness, such as Healthy Families BC

Local municipal and regional policies laid out in parks and trails Master Plans, as well as cycling and pedestrian Master Plans also reflect support for walking and hiking. By building on *The BC Trails Strategy*, this master plan aims to connect various organizations and institutions who are all working independently to further trails development and support hiking trails tourism in their respective roles and jurisdictions, by encouraging partnerships and creating a shared vision to advance hiking tourism.

"First Nations have used trails for travel and acquiring sustenance throughout history. Early European explorers and settlers to British Columbia relied on these already established trails and added to their unique histories. Nine heritage trails, totaling over 500 km, have been designated in B.C. under the Heritage Conservation Act. In addition, some First Nations are actively involved in protecting trails, and in managing and promoting responsible trail use that respects cultural values."⁵

Increasing Diversity of Users

"There is growing recognition of the increasing diversity of users and the need to reflect diverse values in trail planning and management. One of the factors contributing to the increase in demand for trails is the growing number of activities occurring on trails. Competing demands for trails and recreation opportunities often reflect different values and can lead to friction between user groups."⁵

Increasing Transportation Role for Trails

"Trails are playing a greater transportation role as greener alternatives become increasingly popular."⁵



2. Hiking Tourism In The Vancouver Island and Coast Region Today

2.1 The Benefits of Hiking Tourism

Tourism may bring diverse benefits to communities if the right mix of appealing experiences, services and amenities are provided. As visitation increases, communities and their economies may become more competitive enabling host communities to develop new and/or enhance existing experiences. As tourism grows in the VIC Region, host communities begin to realize the economic, social, cultural, and environmental benefits of tourism (see Figure 5)⁶.

Increasing Recognition of Economic Benefits

“Recreation trails are becoming recognized as drivers of economic development and tourism. It is also becoming apparent that economic benefits can even increase if trails are designed and managed as a network of interlinked connections between communities and a range of attractions.”⁵

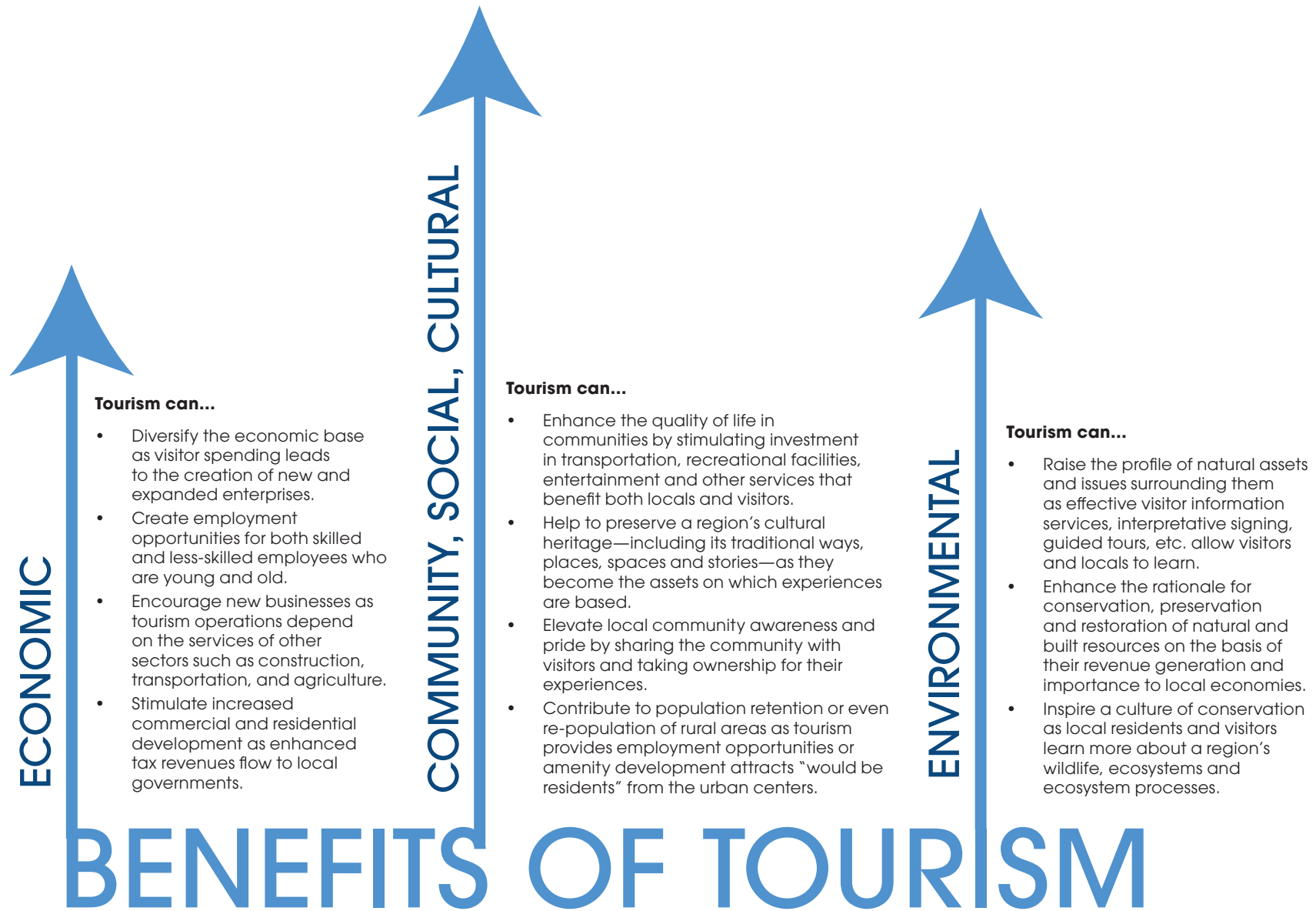


Figure 5 Benefits of Tourism

2.1.1 Economic Benefits of Trails

Recreation trails are becoming recognized as drivers of economic development through tourism. Trails provide opportunities to develop commercial recreation businesses as well supporting services which boost economic activity in host communities. Research suggests that the magnitude of economic benefits can increase if trails are designed and managed as a network of interlinked connections between communities while providing a range of complimentary attractions, access and amenities (p. 9).⁷ Research shows ample evidence that trails not only enable Canadians to live actively in a healthier environment, but also that trails most often economically benefit both adjacent landowners and the local business community. 70% of all trail users spent money on non-durable goods leading to job creation and increased property values for adjacent land owners.⁸ Trails in Canada are largely built and maintained volunteers and non-profit organizations, often with support from local communities and various levels of government. Governments may encourage community groups to adopt sections of trails because it encourages people to build and maintain sections of trail that can mobilize volunteer resources and obtain corporate contributions. Additionally, municipal recreation departments, provincial government agencies and regional, provincial or national park authorities manage and operate trails. Trail development may also be possible through the support of private landowners. Successful trail development and management occurs when volunteers, landowners, local businesses and government work together (p. 5).⁹

The Government of Canada announced a major job-creating investment in the 2009-2010 Economic Action Plan, with a commitment to invest \$25 million in recreational trail infrastructure. During this time over \$23.2 million of federal government funding was distributed by the National Trails Coalition on to infrastructure investments in 474 recreational trail projects across Canada. Funding partners including provincial and municipal governments provided another \$33.3 million. The total investment in these projects amounted to \$56.5 million (p. 10). The 2009-2010 National Trails Coalition program created jobs and increased opportunities for tourism at a time when there was a strong need for economic stimulus across Canada (p. 11).¹⁰

2.2 Visitation & Economic Impact

With over 3.8 million person-visits and \$1.3 billion in related spending, tourism is one of major economic drivers in the VIC Region. Destination British Columbia (BC) (2015) indicates that this region represents 21% of provincial over-night visitation and 15% of related spending.

“The most common outdoor recreational activity of BC residents is ‘Hiking – Day Trip,’ with over half (55%) reporting that they participated in this during the past year (p.10).” “The motivating factors for participation in outdoor recreational activities are spending quality time with family and friends, being closer to/experiencing the natural environment, and resting, relaxing and recuperating (p. 42).”¹¹

Hiking and backpacking is one of the most popular activities and traveler motivators for visitors originating from British Columbia and the rest of Canada (Destination BC, 2015). In fact, hiking or backpacking was ranked the second and third most popular outdoor activity undertaken by these markets.

Local, regional and provincial data on hiking tourism is scarce and disparate. However, in 2015, Vancouver Island University and The Sociable Scientists conducted a series of regional visitor profile studies (through surveys) in the following communities and regions: Vancouver Island North, Campbell River and Region, Comox Valley, Parksville Qualicum Beach, Port Alberni, Tofino, and Nanaimo. The research found that the VIC Region is very appealing destination for travelers interested in hiking. Visitors were asked to indicate what activities they participated in during their stay and hiking ranked highly in most studied communities.¹²

Hiking Ranks High For Visitors!

36% Campbell River

27% Comox Valley

32% Vancouver Island North

27% Alberni Valley

55% Tofino

53% Parksville Qualicum Beach

% of visitors who chose hiking as an activity

For some travelers, hiking is the primary travel motivator. Meanwhile other travelers may be motivated to travel for other reasons but may still engage in hiking as a secondary activity during their trip. It is important that destination planners consider and plan to meet the needs and expectations of both.

The Vancouver Island Region is uniquely positioned to package, build marketing strategies and travel itineraries cross-promote to both destination hikers and touring markets.

2.2.1 Canadian Hikers

The 2006 TAMS (Traveler Activity and Motivations Survey) estimated that a total of 5.6 million Canadian travelers visited British Columbia in 2004/05. Among these travelers, 36% participated in hiking while on at least one trip in the past two years and approximately 10% were motivated hiking travelers (travelers for whom hiking was the primary reason for taking at least one trip). Of the estimated 1.4 million Canadians who were primarily motivated by a hiking activity as part of their travel in 2004/2005, 38% had travelled to British Columbia in the same time period. BC travelers were much more likely than Canadians overall to travel within the province, with 95% of motivated hiking travelers taking a trip.

Over the period from 2004-2006, 25.4% (6,281,852) of adult Canadians went hiking, climbing and paddling while on an out-of-town, overnight trip of one or more nights. Hiking as a same-day excursion (18.1%) was the most popular activity (p. 1). One in four Canadian motivated to travel for hiking were between 18-34 years of age. Hikers... tended to stay in public campgrounds while on trips (p. 12).¹⁵

Canadian Hikers... are more likely than the average Canadian Pleasure Traveler to read the travel section of newspapers, watch travel shows on television and visit travel websites. This segment may also be effectively targeted through science and nature media (e.g., science and geography magazines, science and nature television shows, science fiction television shows) and electronic product media (p. 19).²²

2.2.2 American Hikers

Hiking or backpacking was not one of the top 5 activities for US or other international visitors who visited British Columbia. However, visiting a National, Provincial or Nature Park was and it could be reasonably assumed that hiking, backpacking and/or walking on trails in these parks is a regular activity in which these markets engage.

Among the estimated 7 million US travelers who had visited BC in 2004/05, 35% participated in hiking, while 11% were motivated to travel for a hiking experience. Of the estimated 9.8 million US travelers who are motivated to travel for hiking, approximately 8% had made a trip to British Columbia in 2004/05.¹⁶

A same-day hiking excursion was the most popular activity for 13.3% of adult Americans in this activity segment. American hiking travelers were young compared to the typical American pleasure traveler, with the largest age group of same day and overnight backpack hikers being between the ages of 18 to 34.

Hikers... were more likely than the average US. Pleasure Traveler to take a trip to Canada. A consistent theme in the vacation activities of Hikers... while on trips... was 'getting close to nature'. They were also more likely than average to stay in public campgrounds when on a trip (p. 1).¹⁷

For many Vancouver Island residents and travelers to the VIC Region, the natural environment is particularly important. Effective sustainable tourism development requires careful consideration of all tourism activities in order to facilitate mitigation strategies for negative impacts from development (construction), access (transportation), supply chain (food, restaurants), accommodations (carbon footprint), and attractions (hiking, motorized recreation).¹⁸

Most American Hikers... use the Internet to plan their trips and the large majority (60.8%) book travel online. Relative to the average US Pleasure Traveler, they are much more likely to obtain information from travel guide books, official government travel guides and visitor information centres. The most effective media for reaching this segment includes nature and science magazines and television programs and travel related websites, magazines and television programs (p. 1).²³

There were, however; age differences between US and Canadian hiking travelers in the older age categories. The overwhelming majority of overnight backpacking Canadian hikers was under the age of 55 (92%). This was less so with the same-day excursion hikers, where a lesser majority were under 55 (83%).

2.2.3 Drive Tourism

Touring vacations and touring and exploring are identified as a key tourism product by the BC Ministry of Jobs, Tourism and Skills Training and offer some of the most significant short-term and long-term visitor volume potential for BC according to "Gaining the Edge: 2015-2018"¹⁹ Touring and exploring vacations are also known as 'drive tourism' and may be defined as "the act of taking a leisure trip in ones own, borrowed, or rented vehicle". This form of tourism includes travel where a motorhome, fifth wheel, trailer or camper is the primary means of accommodation. It also includes travel where a vehicle is used as the primary form of transport, and tents, hotels, lodges or B&Bs, or other structures are used for accommodation."²⁰

These vacation types are popular and convenient in North America particularly for families travelling with young children and for Europeans who generally come to Canada for longer stays. However, drive vacations are vulnerable to increased gas prices. More research is needed to fully understand why people choose to take holidays of this type, how they choose their destinations and "how they behave and make decision whilst on holidays." (Hardy, A. 2006, p. 21, UNBC). A Drive Market study conducted in BC in 2009 revealed that British Columbia residents accounted for 38% of the provinces drive tourism market which Alberta and Ontario each accounted for 15% of the market. This market is interested in sightseeing (76%), opportunities for relaxation (60%), and the availability of nature / scenery / parks (56%). Factors that influence destination choice include: Natural Features / Landscapes (73%), and Available Outdoor Activities (33%), both supportive attributes of hiking tourism opportunities.²¹





The majority of hikers take vacations to...

- 73.5% Get a break from the day to day routine
- 70.2% Relax and relieve stress
- 57.9 % Create lasting memories
- 54.9% Enrich relationships
- 53.5% To see or do something different

5 Most Important Destination Attributes

1. Feeling safe (57.8%)
2. No health concerns (43.5%)
3. Lots for adults to see and do (41.7%)
4. Convenient access by car (41.4%)
5. Availability of mid-range accommodations (28.1%)

Source: Lang Research Inc, 2006

While visiting they also...

- Stroll to see city buildings
- Visit a nature park
- Sunbathe
- Swim (oceans & lakes)
- Visit well known natural wonders
- Visit historic sites or buildings and museums
- Enjoy arts including live arts
- Go to farmers markets & fairs
- Participate in cultural activities including aboriginal cultural experiences

Most Popular Information Sources For Trip Planning

- 78.8% Internet website
- 62.5% Word of mouth
- 60.4% Past experience
- 43.6% Maps
- 37.1% Travel guides

*Hikers are unlikely to seek information about the destination through travel shows, electronic newsletters or television ads.

Source: TAMS (2006)

3. Destination Analysis

3.1 Regional Character

The VIC Region is one of the warmest climates in Canada with dry warm summers and mild, but wet, winters. Unlike most regions in Canada, the favourable climate enables the VIC Region to position itself as a year-round destination for hiking experiences. From coastal rainforests to alpine mountain peaks, remote backcountry to urban centers, the VIC Region offers a diversity that is unmatched by most. Our unique coastal landscape offers hiking experiences that make us different from other parts of BC. We also have 2 UNESCO biosphere reserves!

3.1.1 Hiking Trails in the Vancouver Island and Coast Region

Our analysis the Phase 1 inventory of trails revealed that the majority of hiking experiences offered in the VIC Region were in the easy to moderate difficulty category and were within a "mid-country" setting. This indicates that most of the trails inventoried are accessible by the touring/ exploring market and require limited to no special skills or equipment.

Of the 250 trails (2,124.7 km) that were inventoried, many of them are in good to fair condition with management plans in place.

3.1.2 Hiking Tourism Experiences

Visitors, expectations for hiking experiences are very different. Some visitors prefer the mountains, other visitors like coastal hikes, some seek high adventure while other gravitate to gentle strolls. To appeal to the greatest diversity of visitors, it is also important that the trail systems reflect the natural diversity of the study areas as well as the full range of recreation and tourism settings from backcountry wilderness to urban areas.

"Tourism opportunity" is defined as the ability for a person to engage in a preferred activity within a preferred setting to obtain a desired experience. This underscored the importance of inventorying the features that facilitate activities and the settings in which the activities occur, which are equally important to understanding the supply of recreation opportunities. Hiking trails were mapped according to Provincial Recreation Opportunity Spectrum (ROS) data set where data existed. Where ROS data was unavailable, the inventory relied on self-reported data.

$(\text{Activity} + \text{Setting}) \times \text{Natural Region} = \text{Experience}$

Tourism Opportunity—the ability for a person to engage in a preferred activity within a preferred setting to obtain a desired experience.



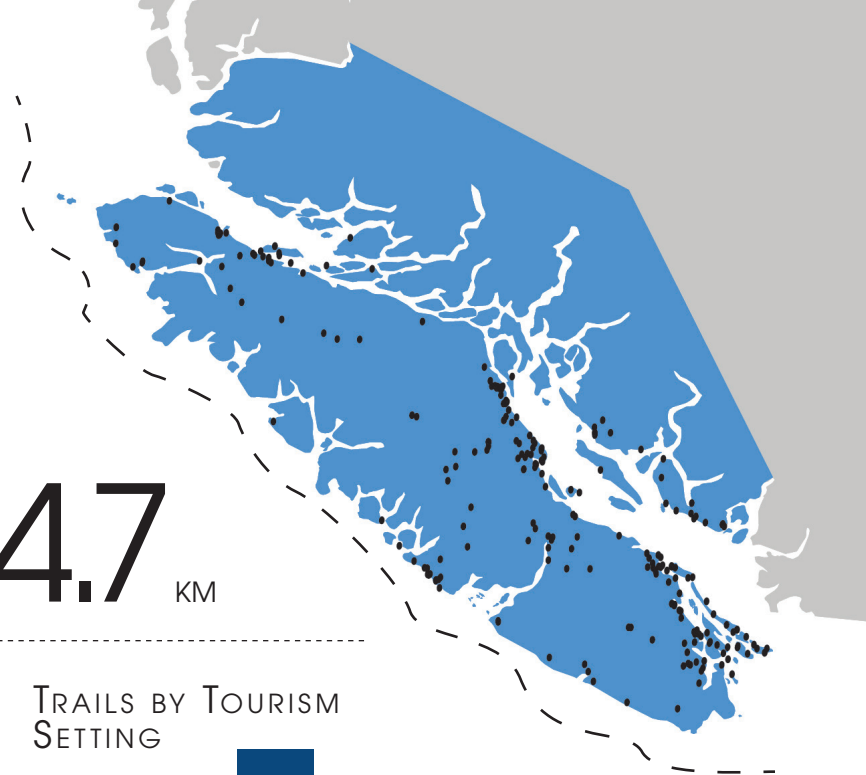
TRAILS: BY THE NUMBERS

250

Trails on Vancouver Island, the Gulf Islands, and the Sunshine Coast

= 2,124.7

KM



TRAIL DIFFICULTY



EASY

630 km



MODERATE

946 km



DIFFICULT

368 km

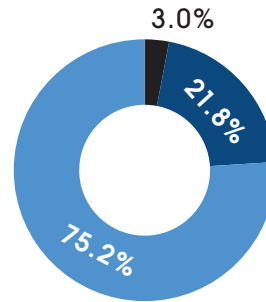


EXTREMELY
DIFFICULT

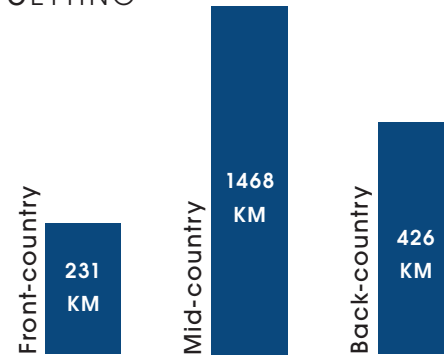
181 km

TRAIL CONDITION

Good
Fair
Poor

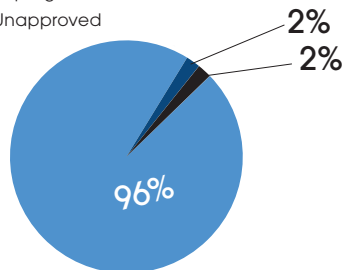


TRAILS BY TOURISM SETTING

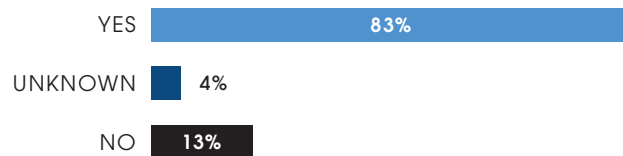


APPROVAL STATUS

Approved
In-progress
Unapproved

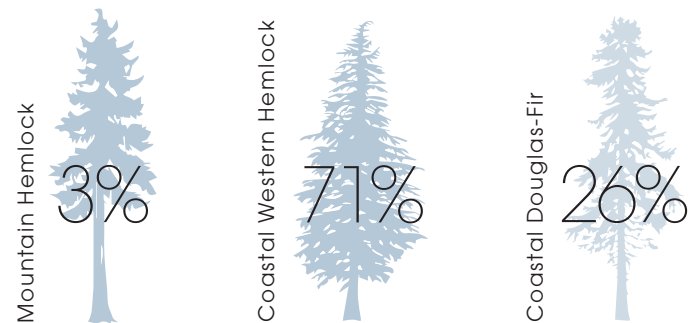


MASTER OR MANAGEMENT PLAN



89% of trails inventoried are covered by insurance

TRAILS BY NATURAL REGION



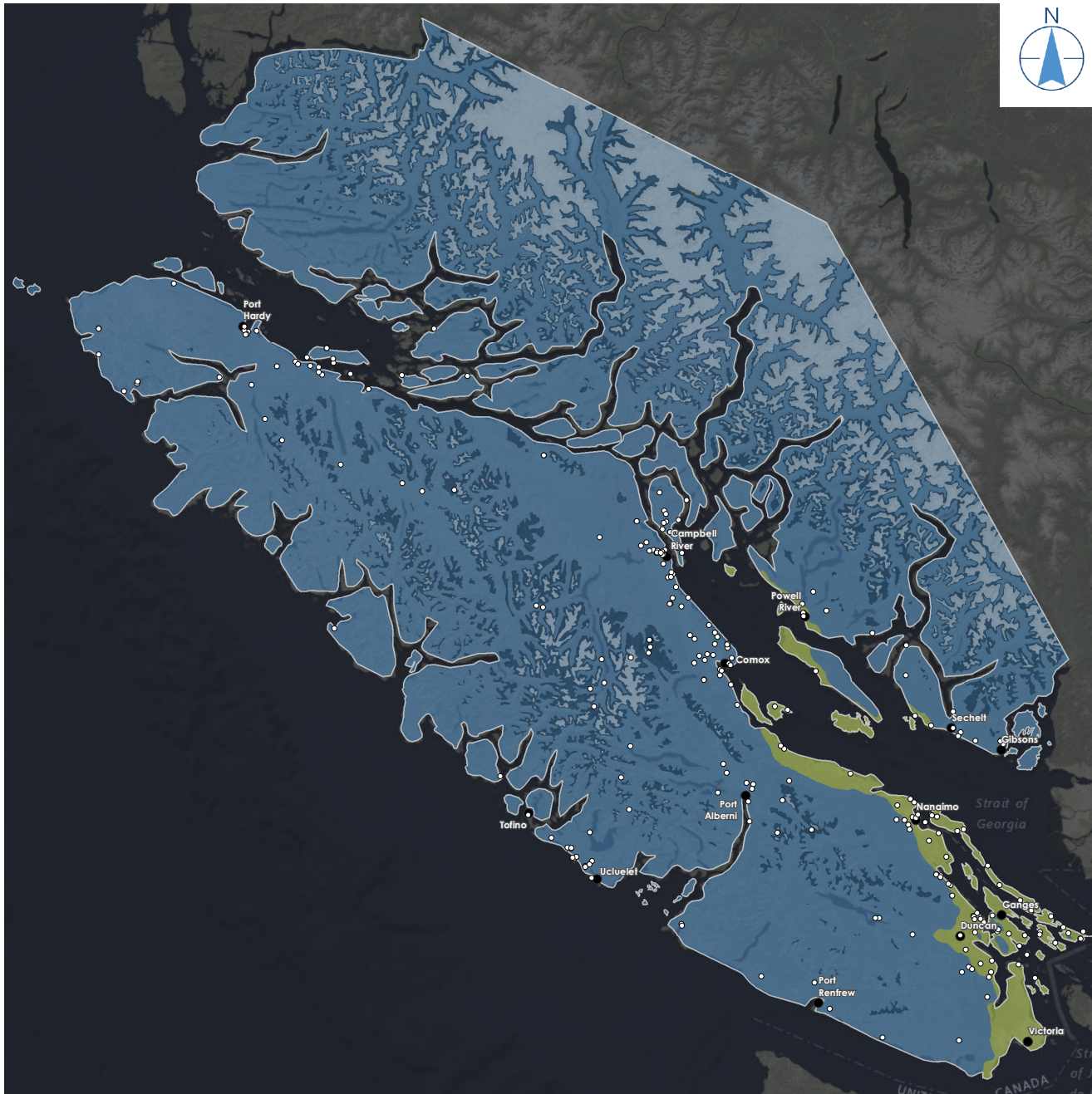
3.2 Hiking Trails by Biogeoclimatic Region

Blessed with immense natural diversity, it is important that while planning for the future of hiking tourism in the VIC Region, we consider how we feature the region's natural diversity to visitors. To do so, the distribution of existing hiking trails by biogeoclimatic zones was evaluated. Biogeoclimatic zones are a classification system used to describe and map the province's ecosystems. The VIC Region contains five distinct biogeoclimatic zones; coastal Douglas fir, coastal mountain hemlock, coastal western hemlock, mountain hemlock and alpine tundra. The distribution of hiking trails within each biogeoclimatic zone are as follows:

From this analysis, it's clear that the distribution of our hiking experiences – as inventoried – do not fully or equally represent the VIC Region's ecosystems. This suggests there is opportunity to diversify the VIC Region's hiking opportunities ensuring visitors can experience the region's natural diversity. Our current supply of trails occur mostly within Coastal Western Hemlock zones and the Coastal Douglas Fir zone. The Coastal Douglas Fir Zone provides a unique ecological area, characterized by rare Garry Oak ecosystems, wildflowers and Arbutus trees. It is limited to the Southeastern Vancouver Island (Victoria and Gulf Islands) occurring in comparatively lower elevations below 150 m. Very few trailheads occurred in the Coastal Mountain Hemlock zone, characterized by higher elevations between the densely forested Western Hemlock Zone²² and the treeless Alpine Tundra Zone. The distribution of hiking trails within each of the biogeoclimatic zones is shown on the following map.

Coastal Douglas-Fir	64 Trails = 398 km
Coastal Mountain Hemlock	8 Trails = 56 km
Coastal Western Hemlock	178 Trails = 1,671 km
Mountain Hemlock and Alpine Tundra (but some trails cross this zone)	0 Trails = 0 km

Biogeoclimatic zone - a geographic area having similar patterns of energy flow, vegetation and soils as a result of a broadly homogenous macroclimate



Legend

- Study Boundary
 - Major City
 - TVI Trail Head Locations
 - Coastal Douglas-fir
 - Coastal Mountain-heather Alpine
 - Coastal Western Hemlock
 - Mountain Hemlock
- 0 30 60
 Kilometres

Figure 6 Biogeoclimatic Zones

Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community, Esri, HERE, DeLorme, MapmyIndia, ©OpenStreetMap contributors, and the GIS user community

3.3 Hiking Trails by Recreation Opportunity Setting

Some visitors prefer remote, isolated environments with few comforts of home, while other visitors expect easy access, frequent interaction with others and all the creature comforts. Meanwhile others prefer something in the middle. Whatever one’s preference is, the VIC Region offers visitors the full range of recreation and tourism settings. From the front-country areas near our urban centers to the remote backcountry areas of the north island, we offer a little something for everyone. Recognizing different visitors prefer different recreation settings, it is important to evaluate how the VIC Region’s hiking trails are distributed across recreation settings.

Front-Country

According to the Recreation Opportunity Spectrum, Front Country experiences occur nearby urban, exurban or rural centres. These are landscapes that have been substantially modified by human development and may not appear as natural in the wilderness. Visitor infrastructure (i.e., paved trails) and amenities such as washrooms and running water are readily available. The area is easily accessible by car and by bus or through organized tours and interaction with other visitors is frequent. Emergency response in these areas is readily available.

Mid-Country

The Recreation Opportunity Spectrum describes a Mid-Country experience occurring in natural settings where human developments are obvious, but often integrated within wilderness areas. Visitor infrastructure includes groomed trails (hard surface, gravel or natural conditions) and many amenities such as toilets and running water are frequently available. The area is accessible by car and interaction with other visitors is possible to frequent. Emergency response in these areas is available but likely to be delayed. As hikers progress from Front to Mid to Back-Country Experiences, levels of supporting services may be restricted.

Back-Country

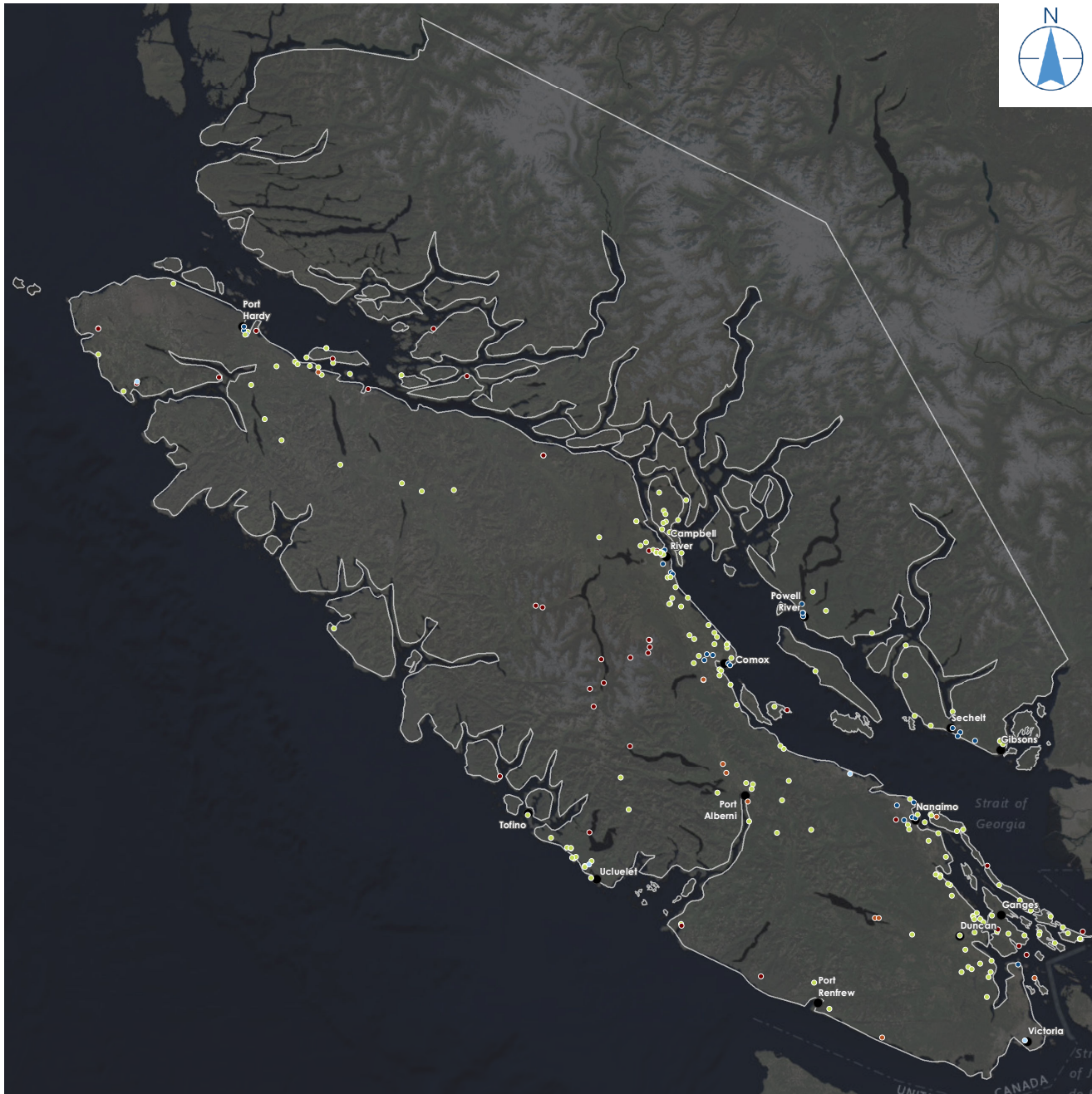
Back Country experiences as described using the ROS system occur in remote areas with limited evidence of development and industry. Basic infrastructure such as composting toilets and single track trails may be available. Back country trails may be accessible via rough roads or motorized trails, and interactions with others are infrequent. Emergency response in these areas is limited.

The phase 1 inventory together with the provincial Recreation Opportunity Spectrum dataset (where it existed) was analyzed to determine the distribution of hiking trails by recreation and tourism setting. As shown in Table 1, the currently trail supply is highly concentrated in the mid-country setting.

Table 1 Distribution of Hiking Trails by Recreation and Tourism Setting

Recreation and Tourism Setting	# of Trails
Front Country (Urban)	26
Front to Mid Country	6
Mid country (Rural)	169
Mid to Back Country	11
Back Country	38

A common misconception is that the VIC Region offers only advanced, hiking experiences that require top fitness, special skills, and equipment. This may be in part attributed to well-known multi-day rugged hiking trails such as the West Coast Trail or North Coast, or Sunshine Coast Trails. As supported by the data, the reality is that the VIC Region offers something for everyone and many that are in close proximity from urban centres.



Legend

- Study Boundary
 - Major City
 - Back-Country
 - Back & Mid-Country
 - Mid-Country
 - Mid-Country & Front-Country
 - Front-Country
- 0 30 60
Kilometres

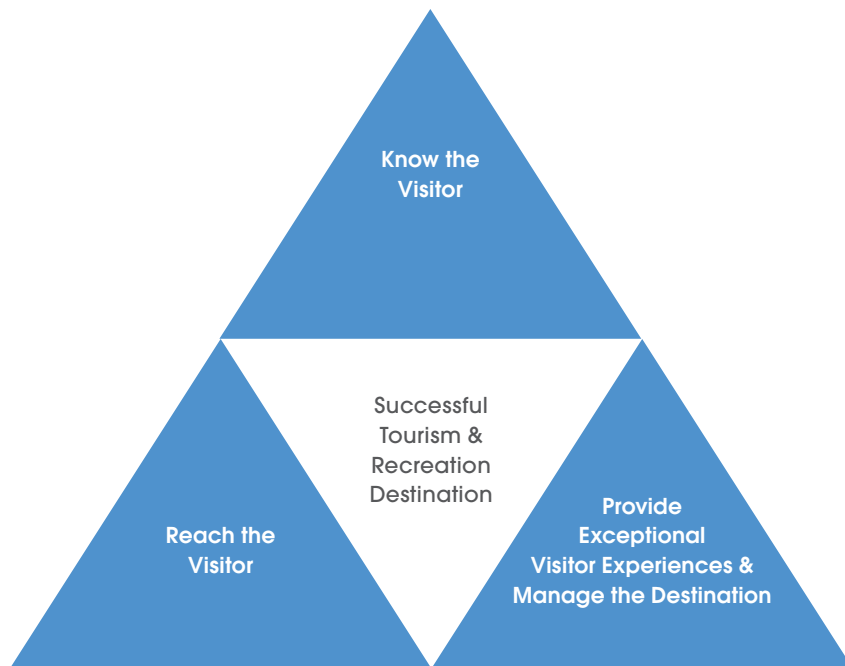
**Figure 7 Recreation/
Tourism Setting
Hiking Trails**

Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community, Esri, HERE, DeLorme, MapmyIndia, ©OpenStreetMap contributors, and the GIS user community

3.4 Hiking Experience Typologies

Understanding and focusing on the visitor is one of the most important aspects of planning and delivering desirable hiking tourism experiences. The most successful destinations focus detailed attention on understanding who their best visitors are, where they come from, what these visitors want to experience and how best to communicate with them to compel them to visit.

Though market research on hiking travelers is sparse and disparate, a new typology of hiking experiences was developed by combining market research from the Explorer Quotient, Adventure Travel Trade Association's Adventure Traveler Types and professional experience. Creation of a typology allows tourism developers and trails planners to ensure the hiking experiences are being designed, first and foremost, with the target markets' expectations in mind. Creation of the experience typology also allows planners to evaluate whether the distribution of hiking experience by type and by geography.



Three distinct trail experience typologies were developed although we recognize that travelers, especially the two "Learner" groups of Cultural Explorers and Authentic Experiencers, may at times move between the Strolls and Excursions trail types. Of greater importance is the setting of realistic expectations for these trail types. This was based on the profiles of traveler types and the settings for hiking throughout the VIC Region that describe the level of challenge and biogeoclimatic zone that they would be most drawn to for their preferred hiking experience. The three EQ types were also chosen based on the target groups identified in the tourism strategic plans of Destination BC and Destination Canada. Trail operators and tourism planners should use these typologies to guide the planning and design of hiking tourism experiences. This general guidance will help to ensure that traveler experiences are consistently delivered throughout the VIC Region and that the brand promise of the VIC Region's exceptional network of hiking experiences is maintained.

Hiking, as a segment of the adventure tourism marketing is experiencing growth.²³ In addition, according to a drive market study conducted in 2009, travelers to BC are interested primarily in sightseeing and available outdoor activities, both of which are key factors that influence hiking tourism opportunities.

Trail Experience Types



Strolls

Easy & short distance beginner coastal or inland, agricultural day hikes on well- marked trail heads and groomed paths.

This may be combined with cultural or historic attractions or nature guided or organized tours.

Easy access from urban centres or small towns with accommodations such as resorts, hotel, B&B's. Modest or no elevation gain. No special skills or equipment needed. Appeals to a broad range of visitors new to an area. Cultural Explorers would be an important target, by combining cultural elements on these strolls with other cultural experiences in the regions. This group is less interested in the physical challenge, and more focused on understanding the social environment.



Excursions




Intermediate day or multi-day coastal or inland forested hikes with some amenities, often combined with cultural/historic/natural interpretive experiences. Usually self-guided and could be along some semi-rugged terrain with challenging aspects (higher elevation gain or rock scrambling, repelling requiring some fitness. Tours and Accommodations available such as cabins, organized camping, or B&B's. Authentic Experiences would be an important target for these trails, which allow these travelers to explore and experience nature farther from the influence of people. Some physical challenges are expected, allowing them to better connect with nature.









Epic Adventures




Strenuous back country or epic adventure hikes in remote or places requiring coordinated transportation access. Often multi-day or long distance treks on rugged terrain or with high elevation gain, requiring special gear and physical fitness for the experienced hiker. Trails may be guided or self-guided but not always well- marked and with few or no amenities. Backpacking or camping in full nature immersion or remote wilderness lodges and fly-in. Free Spirits would be an important target group, looking for the grand experience that is worthy of sharing with friends. Physical challenges add to the value of the 'story' they will relate when they are done.




Table 2 Hiking Experience Type

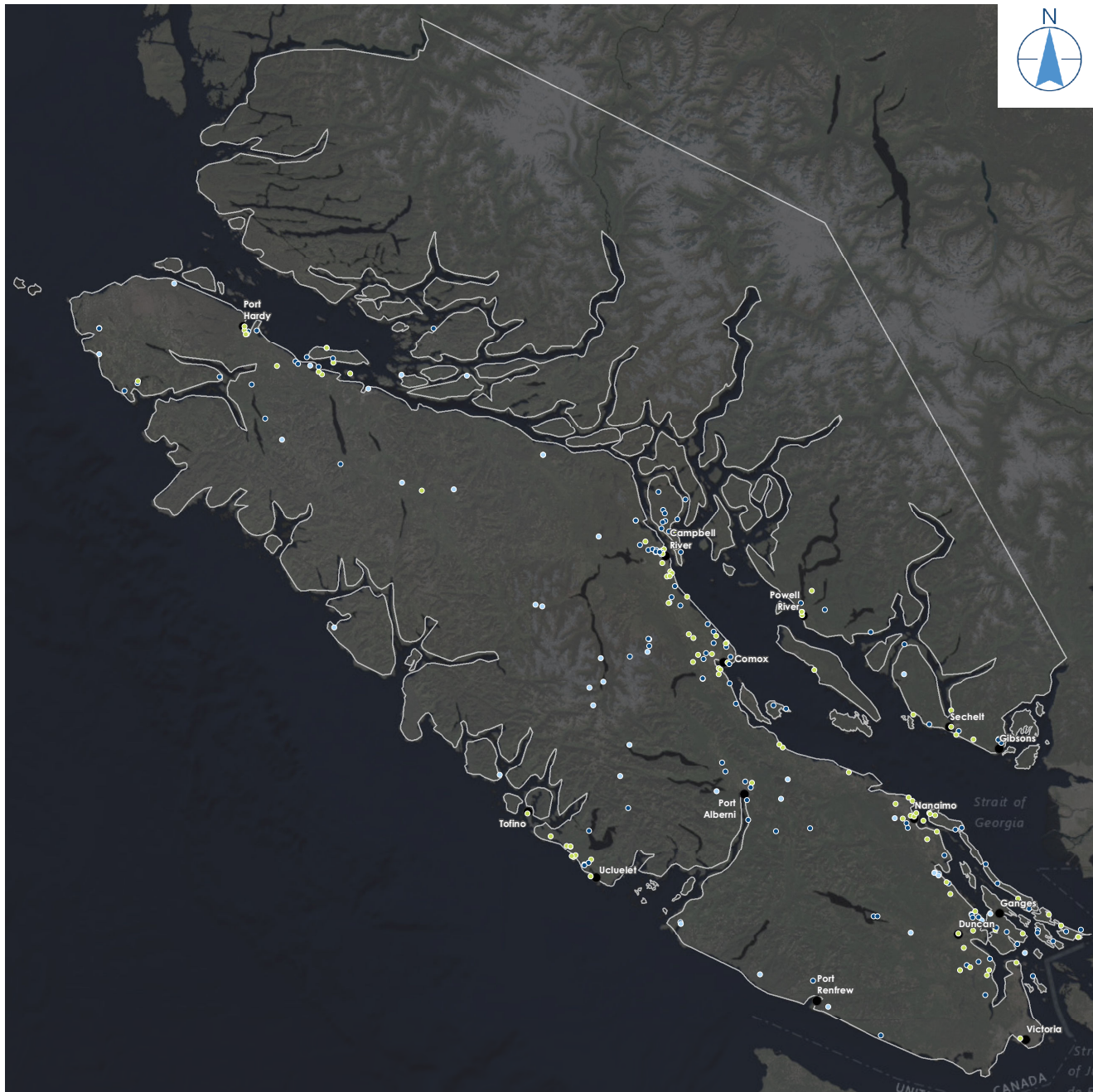
EXPERIENCE ATTRIBUTES		TRAIL EXPERIENCE TYPES		
		 Strolls	 Excursions	 Epic Adventures
Market Segment Appeal	Primary EQ Group	Cultural Explorers	Authentic Experiencers	Free spirits
	(ATTA) Traveler Types	Grazer	Adventurer	Enthusiast—specialized skills
Traveler Characteristics	Motivations	Family Time—exploring new places, social, educational, and cultural experiences	Casual or Leisure hiker—exploring new places, escapes	Exploring New Places—exciting new activities, ego
	Hiking Experience	Casual/leisure hiker	All levels of experience	Experienced–Expert
	Fitness Level	Not focused on the physical aspects of the hike	Expect periodic strenuous activity	Expect sustained strenuous activity
Adventure Type	Suitability	Soft Adventure	Moderate Adventure	Hard Adventure
	Risk	High control & moderate predictability	Moderate control & moderate predictability	Moderate control & low predictability
	Difficulty	Green	Blue–Black	Black–Double Black
	Skill Level	Requires no to little specialized skills	May require some specialized skills	Requires advanced or specialized skills
	Terrain	Very little elevation gain – accessible with least abilities and no skills – easy. Asphalt or groomed trails. Well defined routes in urban or exurban locations.	Moderately challenging with some elevation gain – accessible to a broad range of abilities. Narrow and potentially un-groomed trails with loose materials.	Challenging terrain – strenuous. Long distances or high elevation or sustained gain – scrambling or portaging may be required.
	Trip Duration	Few hours to overnight - cultural experiences	Few hours to overnighter—weekend escape	Single day to multi-day with overnight stays
Recreation & Tourism Setting (ROS)		Front-country	Front-country to Mid-country	Mid-country to Back-country

EXPERIENCE ATTRIBUTES		TRAIL EXPERIENCE TYPES		
		 Strolls	 Excursions	 Epic Adventures
Visual Character		Modified Forest or Coastal Landscape on a medium to large scale and highly altered. (Agriculture, Urban parks trails) Managed forest with patches of native species.	Modified Forest Landscape or Coastal Landscape on a small to medium scale but still natural looking with predominantly native species. Evidence of managed forest.	Preservation or pristine wilderness habitat. Human impact may or may not be evident on a small scale. Alterations in landscape or logging are not visible or not easily distinguishable from pre-harvest landscape.
Nature Exposure		Bird Watching, Whale Watching, Fish Hatchery. Experiences in controlled settings. I.e. Rapture park (Cowichan Valley), Indigenous fish aquarium (Ucluelet) Interpretive or tour guided experiences. Chance encounters with deer, skunks, squirrels, raccoons and other wildlife acclimatized to urban settings.	Bird Watching, Fishing, Whale watching in exurban or rural settings. Possible encounters with deer, bears, cougars & raptures in their native habitats as well as squirrels and raccoons.	Bird Watching, fishing. Possible or likely encounters with bears, cougars & raptures in their native habitats.
Trip Planning		Pre Arrival online or from car rental, visitor centre or hotel	Pre Arrival online or from car rental, visitor centre or hotel	Pre Airport arrival online, travel magazines, tour packages
5A's of Tourism	Access	Ferry	Ferry	Ferry
		Personal Vehicle	Bus shuttle	Water taxi
		Car rental or Modo	Water taxi	Float plane - helicopter
		City bus	Car rental or personal vehicle	Car rental or personal 4wheel-drive?

EXPERIENCE ATTRIBUTES		TRAIL EXPERIENCE TYPES		
		 Strolls	 Excursions	 Epic Adventures
Attractions	<ul style="list-style-type: none"> • Winery tours • Whale Watching and fishing charters • Gardens and ancient forests • Markets, agricultural based and local products • Museums, totems, murals and old architecture • First Nations cultural experiences • Other recreation activities such as fishing, skiing and golfing 	<ul style="list-style-type: none"> • Winery tours • Whale Watching and fishing charters • Gardens and ancient forests • Markets, agricultural based and local products • Museums, totems, murals and old architecture • First Nations cultural experiences • Other recreation activities such as fishing, skiing and golfing 	<ul style="list-style-type: none"> • Wildlife viewing • Star gazing • Fishing • Ancient forests • First Nations cultural experiences 	
	Amenities	<p>Printed maps, integrated driving and trails maps Roadway and trail signage, wayfinding,</p> <p>Public toilets, signage, retail shopping, restaurants and cafes, visitor centres</p>	<p>Printed maps, signage, wayfinding, trails reviews, & digital wayfinding</p> <p>Public toilets, signage, restaurants and cafes, visitor centres</p>	<p>Maps, signage, wayfinding, trails reviews& digital wayfinding</p> <p>Telecommunications and emergency services</p>

EXPERIENCE ATTRIBUTES		TRAIL EXPERIENCE TYPES		
		 Strolls	 Excursions	 Epic Adventures
	Awareness	<ul style="list-style-type: none"> • Guidebooks Niche Magazines/E-Zines/ Travel News Sites • Web Searches • Travel Blogs • Word of Mouth • Social Media, DMO websites, local government websites 	<ul style="list-style-type: none"> • Guidebooks Niche Magazines/E-Zines/ Travel News Sites • Web Searches • Travel Blogs • Word of Mouth • Social Media, DMO websites 	<ul style="list-style-type: none"> • Guidebooks Niche Magazines/E-Zines/ Travel News Sites • Web Searches • Travel Blogs • Word of Mouth • Social Media, DMO websites • Local Service Providers • Specialty stores/ Outfitters (MEC, RAI)
	Accommodations	<ul style="list-style-type: none"> • Hotel/Resort • Lodges • B&B or cottages • Organized tent camping • Organized RV camping 	<ul style="list-style-type: none"> • Cabin or Hut to Hut • B&B or cottage • Organized tent camping, RV Camping • Yurts • Cabins • Lodges 	<ul style="list-style-type: none"> • Rustic camping • Huts, Yurts • Cabins • Back-country lodges

EXPERIENCE ATTRIBUTES		TRAIL EXPERIENCE TYPES		
		 Strolls	 Excursions	 Epic Adventures
Tourism Services that would apply to hiking trails tourism	Guiding Equipment/ Gear Outfitters, cultural Interpretive programs, nature interpretation, restaurants, etc.	Retail outdoor gear (footwear, clothing)	Retail outdoor gear (footwear, clothing, camping equipment)	Retail outdoor gear (footwear, clothing, specialized camping equipment)
		Interpretive tours	Interpretive tours	Guiding services / Interpretive tours
		Food, beverage, grocery, restaurants, cafes nearby accommodations for daily needs	Food, beverage, grocery, restaurants, cafes within a short drive for daily needs	Food, beverage, grocery, restaurants, cafes in gateway town for before/after trail hike. (Proximity to trail head?)
		Fuel not required, or available for purchase (organized car tent camping)	Fuel	Fuel
	Running water and flush toilets	Note: some amenities may be limited or unavailable pump (outhouse)	Note: amenities may be limited or unavailable no running water (boil required)	
Telecommunications	Wi fi available on trails or in nearby centre	Wi fi not available but periodic internet access would be acceptable.	Short wave radio or possible Wi fi if located near a cell tower	



Legend

- Study Boundary
- Major City
- Epics
- Excursions
- Strolls

0 30 60 Kilometres

Figure 8 Trail Experience Typology

Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community, Esri, HERE, DeLorme, MapmyIndia, ©OpenStreetMap contributors, and the GIS user community

3.4.1 Hiking Trails by Experience Type

The VIC Region offers an abundance of trails to suit the front and mid-country easy to moderate hiking experience, which can be taken in by either the touring/exploring or destination hiker market. These are primarily stroll and excursion hiking experiences clustered along the coastline, near urban centres where they are easily accessible and reflect settlement patterns in the VIC Region.



96 Strolls

649 km



116 Excursions

858 km



38 Epics

617 km



3.5 Tourism Suitability of Existing Trails

In order to create successful hiking tourism destinations, there needs to be a good understanding of what makes them successful. We know there are several potential benefits associated with hiking trails tourism destinations, but what are the key factors that lead to successful outcomes when developing this niche? The most important factors that contribute to the overall success of hiking tourism destinations include:

- Collaboration amongst key stakeholder groups (public and private sector partners); this is particularly critical to the development of long distance hiking trails that potentially cross several jurisdictions
- Uniqueness of trails.

Other key factors that enhance trail experiences include:

- A focus on the visitor experience (pre, during and post trip) is crucial
- Promotion and interpretation of unique trail features and attributes such as cultural and heritage attractions are an important component of visitor experience
- Commercial or private business often support co-creating and integration with visitor experiences

- Partnerships, packaging, and promotions with secondary attractions add value to the visitor experience and may assist in extending trip length
- Connecting the trails to the communities act as gateways or hubs, providing supporting services and amenities (accommodations, restaurants, retail, and information)
- Distances and interconnectedness of trails requires cooperation between regional and adjacent stakeholders.

In addition:

- A professional, collaborative and consistent approach to marketing
- Reliable and sustainable funding, management, and maintenance for trails
- Host community and volunteer support (public, private, and non-profit) is required to fulfill various critical roles.



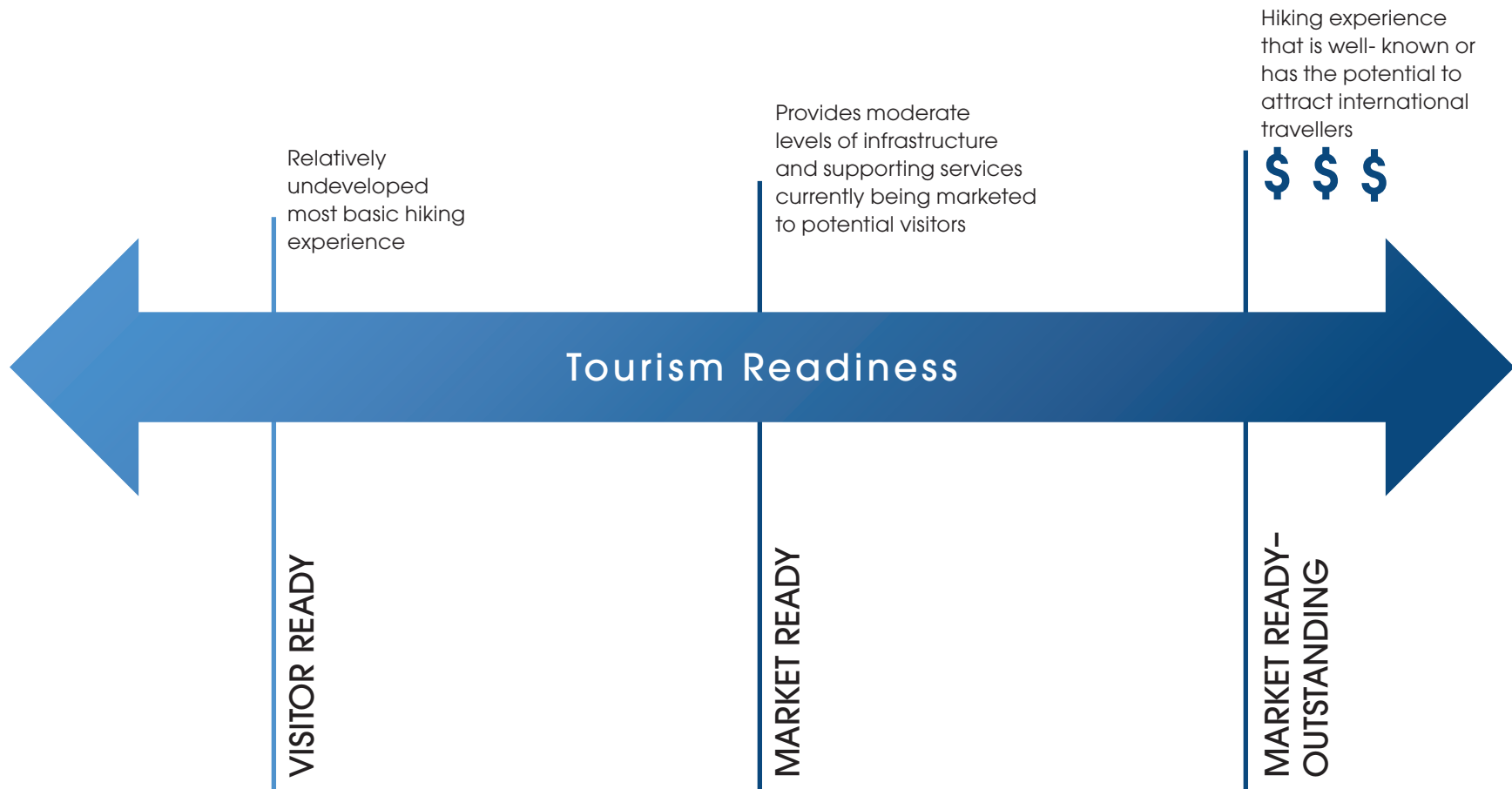


Figure 9 Tourism Readiness Scale

3.5.1 Market Readiness

Destination BC, in partnership with the tourism industry, has developed criteria to determine the ‘market readiness’ of tourism products. The three categories of market readiness include:

- Visitor Ready
- Market Ready
- Export Ready

However, these categories and their associated criteria have some limitations when applied to hiking tourism. The market readiness criteria described by Destination BC are focused primarily on assisting tourism businesses to improve their capacity to attract and to meet the needs of visitors and some criteria are not directly transferrable to evaluating the market readiness of hiking trails.

Using the research, professional judgment and Destination BC’s market readiness criteria as a guide, the market readiness categories and criteria were modified to better suite the evaluation of hiking trails.

Table 3 Trail Experience Typology by Market Readiness Ranking—Summary

Market Readiness of Vancouver Island and Coast Region Hiking Trails	Hiking Experience Types (# of trails)		
	Strolls	Excursions	Epics
Visitor Ready Hiking Trails	45	46	16
Market Ready Hiking Trails	30	27	7
Market Ready -Outstanding Trails	13	3	1



Visitor Ready—Refers to a hiking experience which offers the most basic or rudimentary infrastructure with authorizations, insurance, trail inspections and some trail information available to hikers. A relatively undeveloped hiking experience. These hiking experiences are likely known primarily by locals and short-haul domestic travelers.



Market Ready—Refers to a hiking experience that meets the visitor ready criteria and is currently being marketed to potential visitors in domestic markets. This hiking experience provides moderate levels of infrastructure and supporting services. This type of hiking experience may be supported by a local guide/outfitter and/or some trip planning information may be available on the internet, through local clubs, and visitor information centres.



Market Ready-Outstanding—Refers to a distinctive or ‘iconic’ hiking experience that meets the criteria of both visitor and market ready but has the potential to attract long-haul international travelers. Information, infrastructure, and supporting services are in place; ready to meet the needs and expectations of the more experienced and sophisticated destination hiker.

The following criteria were applied to evaluate the market readiness of each hiking trail in the inventory:

- Approval
- Visitor Information
- Convenience
- Proximity to Point of Entry
- Trail Inspections
- Length of Operation
- Trail Condition (maintenance)
- Accommodations
- Interpretive Signage
- Liability Insurance
- Management Plan
- Wayfinding Signage
- Natural Attractions
- Larger Trail System Designation
- Human Attractions
- Mapping/Wayfinding

Trails that did not have land manager authorization, 'no insurance' or were 'not regularly maintained' were immediately categorized as 'not visitor ready'. In total, 62 trails (24.8%) out of the inventory did not meet some of these basic requirements.

In our analysis of the trail attributes and with some self reporting from trail partners, it is clear there is the potential to elevate all hiking trail experiences to become market ready for visitors coming to hike in the VIC Region.



107 Visitor Ready Trails



64 Market Ready Trails

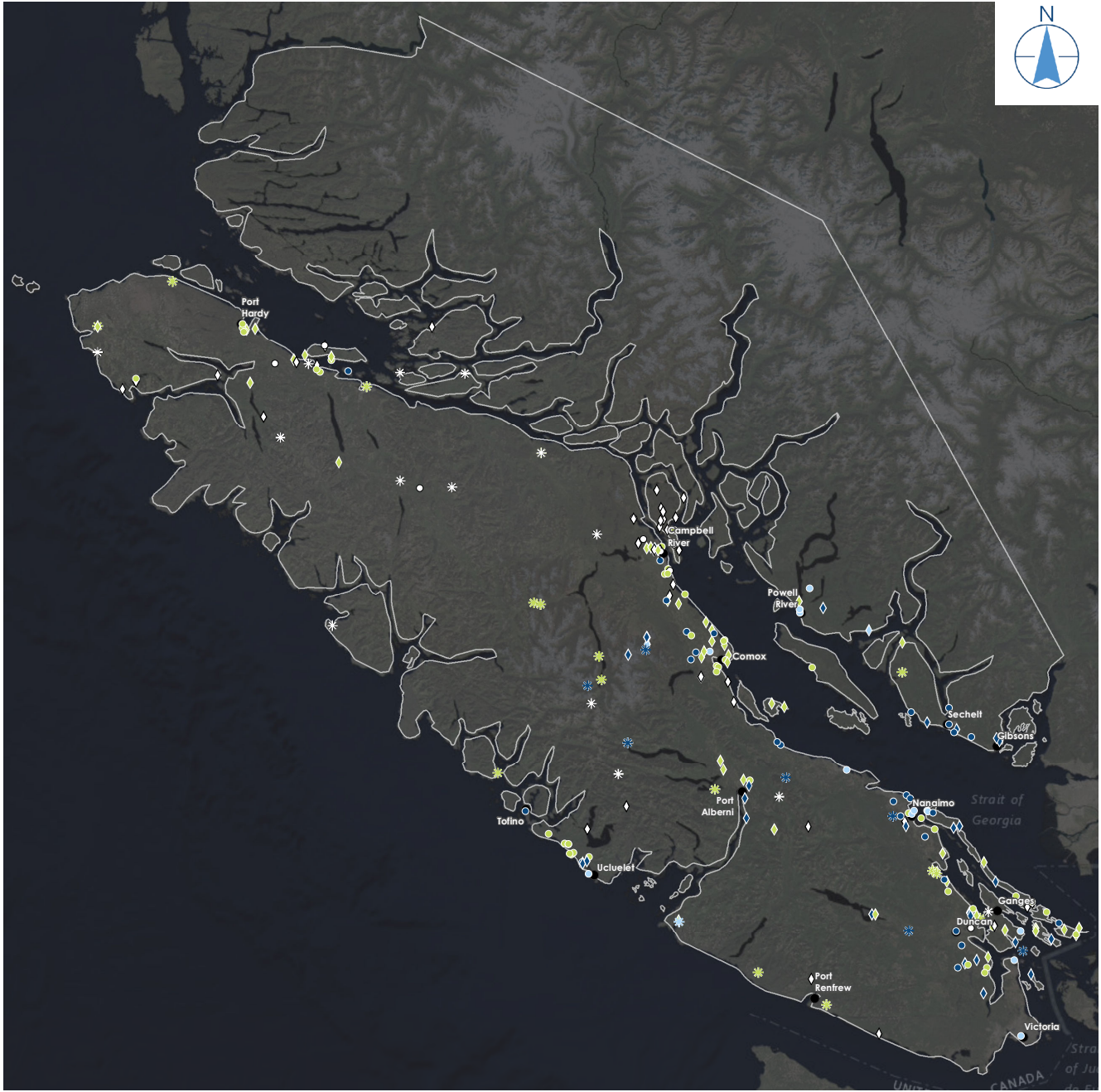


17 Market Ready Trails-Outstanding



62 Not Market Ready Trails

25% of trails in the inventory are not market ready



Legend

- Study Boundary
- Major City
- Epic, Market Ready-Outstanding
- Epic, Market Ready
- Epic, Visitor Ready
- Epic Not Visitor Ready
- Excursion, Market Ready-Outstanding
- Excursion, Market Ready
- Excursion, Visitor Ready
- Excursion Not Visitor Ready
- Stroll, Market Ready-Outstanding
- Stroll, Market Ready
- Stroll, Visitor Ready
- Stroll Not Visitor Ready

0 30 60 Kilometres

Figure 11 Hiking Experience Type by Market Readiness

Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community, Esri, HERE, DeLorme, MapmyIndia, ©OpenStreetMap contributors, and the GIS user community

3.6 Lifecycle Analysis

Destinations are in a state of continuous change. It is commonly accepted that destinations, and the visitor experience themes offered within them, have a life-cycle. According to Butler's life cycle model, a destination and its visitor experience themes will evolve through a series of distinct stages. These stages are: Exploration, Involvement, Development, Consolidation, Stagnation leading to either Decline or possible Rejuvenation.²⁴

To inform our priorities, it was important to understand where each hiking experience type is on the destination life cycle. In alignment with the destination characteristics (see Table 4), professional opinion was used to determine the approximate life cycle stage for each hiking experience type. As shown in Figure 10, our hiking experience types were, in general, in the early stages of the tourism lifecycle. However, it is important to note that some individual trails and the experiences they facilitate (e.g. West Coast Trail, Sunshine Coast Trail) are much further along the destination lifecycle. However, when the trails within each hiking experience type are considered as a whole, the VIC Region has considerable opportunity to advance our hiking experiences along the destination lifecycle.

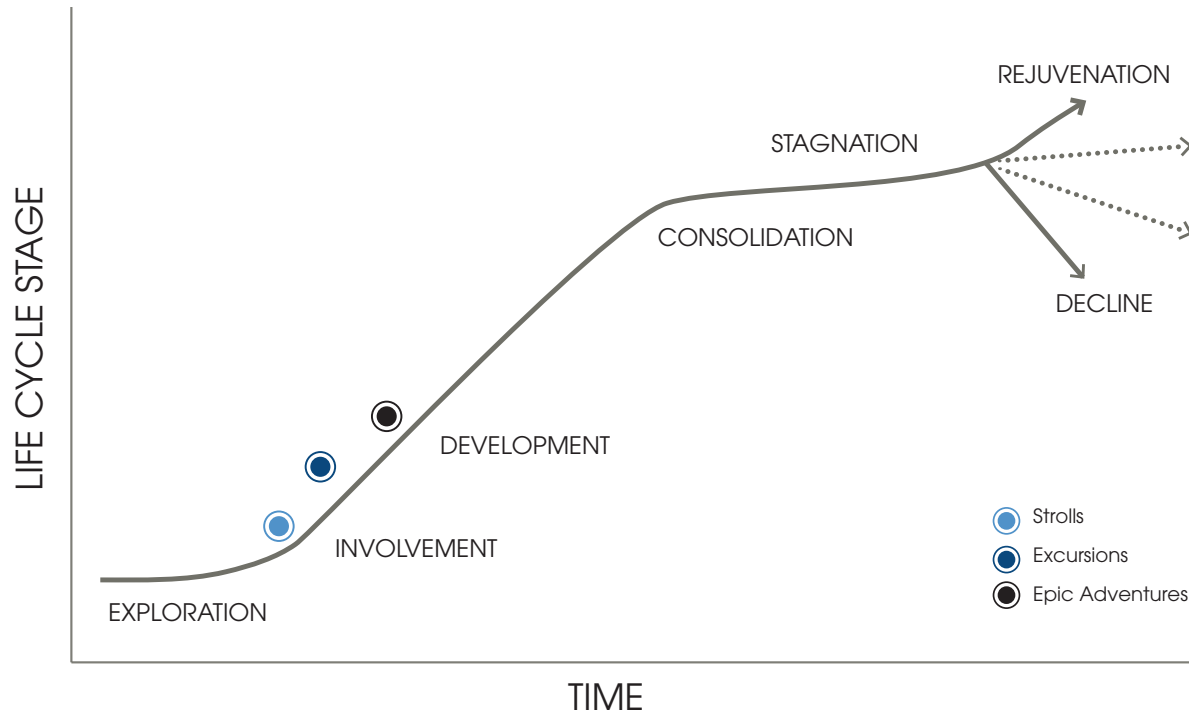


Figure 10 Destination Lifecycle

Table 4 Life Cycle Stage Destination Characteristics

Life Cycle Stage	Destination Characteristics				
	Market Share	Visitation	Activities & Attractions	Employment	Access
Exploration	Unknown	Low	Few—Owned & Operated Locally	Little to no local employment in tourism.	Limited
Involvement	Unknown	Low	Lacking Critical Mass—Owned & Operated Locally	Limited local employment in tourism.	Improved
Development	Known—Short & Long Haul	Moderate–High	Diversifying	Growth in local employment in tourism.	Good
Consolidation	Well Known	High—Reaches Carrying Capacity	Critical Mass—External Investment	Strong local employment in tourism.	Optimum
Stagnation	No Growth	Plateaus—Exceeding Carrying Capacity	Aging—Declining Appeal	Levelling off of local employment in tourism.	Maximized—Too much access
Decline (unless efforts made toward rejuvenation)	Decline	Decline	Decline in Quality	Declining employment in tourism.	Maximized—Too Much

When thinking about the various trails experiences in the VIC Region, we applied the criteria above to arrive at the general destination characteristics described below.

Table 5 Visitor Experience Destination Characteristics

Visitor Experience	Destination Characteristics				
	Market Share	Visitation	Activities & Attractions	Employment	Access
Strolls	Some awareness with short haul markets	Low–Moderate	Lacking Critical Mass—Owned & Operated Locally	Little to no local employment in tourism.	Good
Excursions	Some awareness for Short & Long Haul	Low	Lacking Critical Mass	Limited local employment in tourism.	Good
Adventures	Known to Well Known	Moderate - High with one reaching capacity	Diversifying	Growth in local employment in tourism.	Good





3.7 Markets of Greatest Potential

Each market segment carries with it key motivations for travel, behaviours, and expectations of experience. These were applied to the trails inventory in Phase 1 to identify the trail attributes used to evaluate trails market readiness. The outcome of this evaluation forms the foundation for the types of trail experiences currently offered throughout the study area. The market segments we have identified for the VIC Region, which inform our hiking trails experience typologies are based on Explorer Quotients; Authentic Experiencers, Cultural Explorers and Free Spirits which are most aligned with our target markets. Our trails typologies also align with the following Adventure Travel Trade Association's market segments—Adventure Grazers, Adventurers and Adventure Enthusiasts. These market segments apply to both the destination hiker as well as the touring/exploring traveler where hiking is a secondary motivator.

As indicated earlier, the hiking tourism market can be coarsely grouped into two types of hikers:

1. Destination Hikers who are primarily motivated to travel to a destination because of its hiking experiences, and
2. Touring and Exploring market to whom hiking experiences are a secondary or even tertiary motivator.

Tourism Vancouver Island is focused on primarily attracting the “touring and exploring” market, rather than focusing solely on “destination hikers”. Attracting destination hikers is an important initiative; however, Tourism Vancouver Island will continue its effort to use increased promotion of hiking experiences to further enhance the experience, extend the length of stay and spending by the touring and exploring market which may encourage them to return or, at the very least, share stories of their experience with others. As new hiking experiences are developed and existing experiences are enhanced, the appeal of the VIC Region will increase for both the destination hiker as well as the touring and exploring market.

The touring/explorer hiker is primarily coming from BC and Alberta. Washington and California States and Europe are also important. In alignment with the key target markets of Vancouver Island and the Sunshine Coast, touring and exploring travelers are coming from further reaches such as USA, Europe and Australia in addition to BC and rest of Canada markets. These markets can be targeted for developing hiking tourism.

Destination hikers are not motivated like other hikers where hiking is a secondary travel motivator; however, there is substantial overlap in their expectations. Destination hikers will seek out specific hiking experiences and build their travel itinerary around that primary focus. Destination hikers are looking for a unique, authentic epic adventure trail experience often in rugged and remote wilderness settings. They align closely with the ATTA “adventure enthusiast” traveler. The VIC Region has the potential to develop and increase tourism to meet the needs and desires of the destination hiker through its “Epic Adventures” hiking trails typology.

The touring and exploring hiker will usually be motivated to travel to several destinations based on their attractions and events, only in differing priorities. When we examine the 5A’s of Tourism, both the destination hiker and the touring/exploring hiker are looking for similar amenities and attractions aligned with their EQ travel expectations. Whereas touring/exploring hikers may travel to a destination primarily for other attractions and activities which may include hiking, the destination hiker will travel to a destination primarily because of its attractiveness to hiking and secondly for other activities and amenities that encourage them to stay longer. For destination hikers, hiking is the main event. The touring/exploring traveler has the potential to become a destination hiker, and will return if they are satisfied with the supporting services, amenities and accommodations to support longer stays and longer hikes.

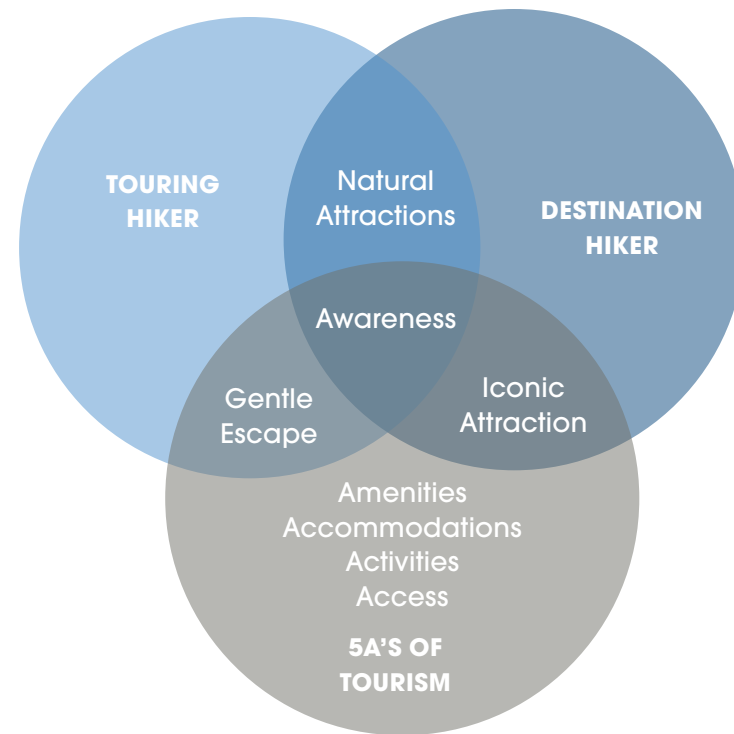


Figure 12 Destination Hiker vs Touring Hiker Experience Needs

3.7.1 EQ – Market Segment Appeal

The Explorer Quotient (EQ) developed by the Canadian Tourism Commission (now Destination Canada), identified the types of travelers to and within Canada and their characteristics. Each market segment carries with it key motivations for travel, behaviours, and expectations of experience. These were applied to the trails inventory in Phase 1 to identify the trail attributes used to evaluate trails tourism suitability. With all three segments, travelers are motivated more by the attractions they may encounter along the journey, than by trail length. Cultural Explorers and Authentic Experiencers are very similar but with an emphasis on more or less cultural or natural attractions. Each EQ traveler is not mutually exclusive to each hiking trail type, but would not likely seek out opposite extremes in trails experiences.

TVI is targeting the following EQ traveler types:

Cultural Explorers: value spontaneity, cultural sampling and trying new experiences. These travelers can be motivated to travel to high quality softer adventure trail-based experiences that are packaged with learning/interpretive opportunities that allow them to immerse themselves in local and Aboriginal cultures. Hiking and other outdoor activities are avenues for experiencing the cultural (and natural) environment; therefore trails situated in mid and front country settings are likely to be more appealing. Cultural explorers tend to take the most vacations of any EQ type, with trips of all durations, but focused more often on weekend escapes. "Strolls" trails would hold the greatest appeal for these travelers although they would not be averse to "Excursions" for the right cultural experience.

Authentic Experiencers: value authentic learning travel, nature, cultural immersion and personal development. They are spontaneous, ethical, and eco-conscious. They are likely to be attracted to nature reserves, world heritage sites, hiking trails, museums, and campsites. There is a good chance that these travelers can be motivated to travel by high quality, hard and soft adventure trail-based experiences that are packaged with cultural and natural attractions, learning/interpretive opportunities and unique/authentic accommodations tied to their interests. These travelers tend to be more mature, and prefer to take longer vacations of a week or more. Authentic Experiencers are most likely aligned with "Excursions" and "Epic" trails types and to the more

physically active and 'fit' touring explorer looking for outdoor activities.

Free Spirits: This traveler is adventurous, curious and likely to be attracted to luxury hotels, tourism hotspots, top restaurants, night clubs and group tours. At first glance, this traveler may not seem a likely candidate to be attracted by trail-based experiences. However; EQ profiling suggests that this traveler seeks unique or iconic experiences and will try just about anything in a group. The Free Spirit traveler is a strong potential target market for high quality, soft adventure trail excursions. This traveler would be attracted by wilderness resorts, remote fishing experiences and hard-to-reach destinations featuring 'Epic' hikes.

3.7.2 Adventure Traveler Types

The Adventure Travel Trade Association or ATTA 2014: Adventure Grazers, Adventurers and Adventure Enthusiasts representing 24, 20 and 8% of the US population, respectively. The ATTA model primarily distinguishes travelers by differences in skill level, whether they repeat activities or bounce around, and how they understand risk as an element of their values and experience. Only 36% of Grazers and 37% of Adventurers, however; currently use tour operators, compared with 48% of Enthusiasts. The younger the Enthusiast, the more likely they were to have booked everything through a travel agent or travel advisor.²⁵

Grazers: people who are primarily working through their "bucket list". Novice and first-time participants. Generally align with the touring/ exploring 'drive' vacation.

Adventurers: people with a preference and skill for a particular sport. Thrill-seeking repeat participants in favourite adventure activities. The ATTA believes that "Adventurers" are the sweet spot for the adventure travel industry. They seem to be the most likely to develop a relationship with an adventure company and become a devoted customer. These travelers have the potential to become destination hikers.

Adventure Enthusiasts: Skilled practitioners in favourite activities. More accepting of risk, spend more money on gear, and are more likely to book with a tour operator or travel advisor. These are definitely in the destination hiker market.

3.7.3 The 5A's of Tourism

Consideration of the 5A's of Tourism²⁶ can assist hiking trails marketers to overcome the barrier between consideration and itinerary planning by providing relevant information necessary to support trip logistics planning by creating awareness of the trails destination. Natural and cultural attractions, how to access the destination and trails, the available accommodation options, and supporting amenities will all be influential in motivating travelers who are looking for unique hiking experiences.

Awareness

Awareness of the destination and the value of tourism are critical to the success of attractions. The local population needs to understand the value of tourism to the community. Front-line tourism and retail staff must have strong, positive attitudes towards tourists to provide positive experiences. Marketing and creating awareness of the destination is another critical factor necessary to promote the destination above competitive destinations or attractions from outside the VIC Region.

Attractions

A tourist attraction is a place of interest that tourists visit for its inherent or exhibited cultural value, historical significance, natural or built beauty, or amusement opportunities. Some tourist attractions are also landmarks. Attractions may also include the activities (another 'A') that can be undertaken at the destination. These may also be recreational, for example, sea kayaking, cycling and fishing or they may be natural attractions such as, beaches, viewpoints, waterfalls or significant geological features.

Access

Transport is needed to physically move tourists from where they live to where they are visiting. Air, water, bus and automobile rental transportation is required to serve the needs of tourists who prefer not to or are not able to transport themselves. The stronger the coordination between travel modes, transfer points and destinations, the more accessible the destination becomes.

Accommodation

All destinations need accommodations nearby from basic camping and backpacking facilities to mega-resorts. Successful accommodation development depends on offering the right type of facility to suit the needs of the key target markets.

Amenities

Amenities are the services that are required to meet the needs of tourists while they are away from home. These may include public toilets, interpretive and wayfinding signage, retail shopping, restaurants and cafes, visitor centres, telecommunications and emergency services. A high degree of co-operation is needed between public and private sector stakeholders to balance and meet the needs of visitors and local residents.

3.8 Experience Market Match

It is important that the recommendations and implementation strategy be informed by a clear “experience market match” that strives to align target market expectations and motivations with the supply of hiking experiences. Understanding target market expectations and demands will be essential when making decisions about and setting priorities regarding the supply, quality and distribution of hiking tourism opportunities across the VIC Region as we move towards Phase 3 - implementation.

The following factors, in addition to professional assessment were used to compare the expectations of target markets with the supply of trail-based experiences used to determine market readiness. These include:

- Unique visitor experience
- 5A's of Tourism (Access, Amenities, Accommodations, Awareness, Attractions (natural and cultural))
- Trail information
- Authorizations and management
- Trail condition and safety

Gaps between our hiking experiences and market expectations occur within the physical infrastructure, marketing and branding as well as partnerships and collaborations that are currently barriers to reaching our full tourism potential.

These include inconsistent or lack of trip planning logistics to assist in aligning visitor expectations with delivery on the ground; a need for planning, communications, and coordination amongst stakeholders; development of amenities and services in alignment with visitor needs, interests, and expectations; and coordinated messaging and marketing through use of the tourism network (i.e., Community DMOs including Tourism Vancouver Island, Destination British Columbia, and Destination Canada).



Experience Product Match Opportunities

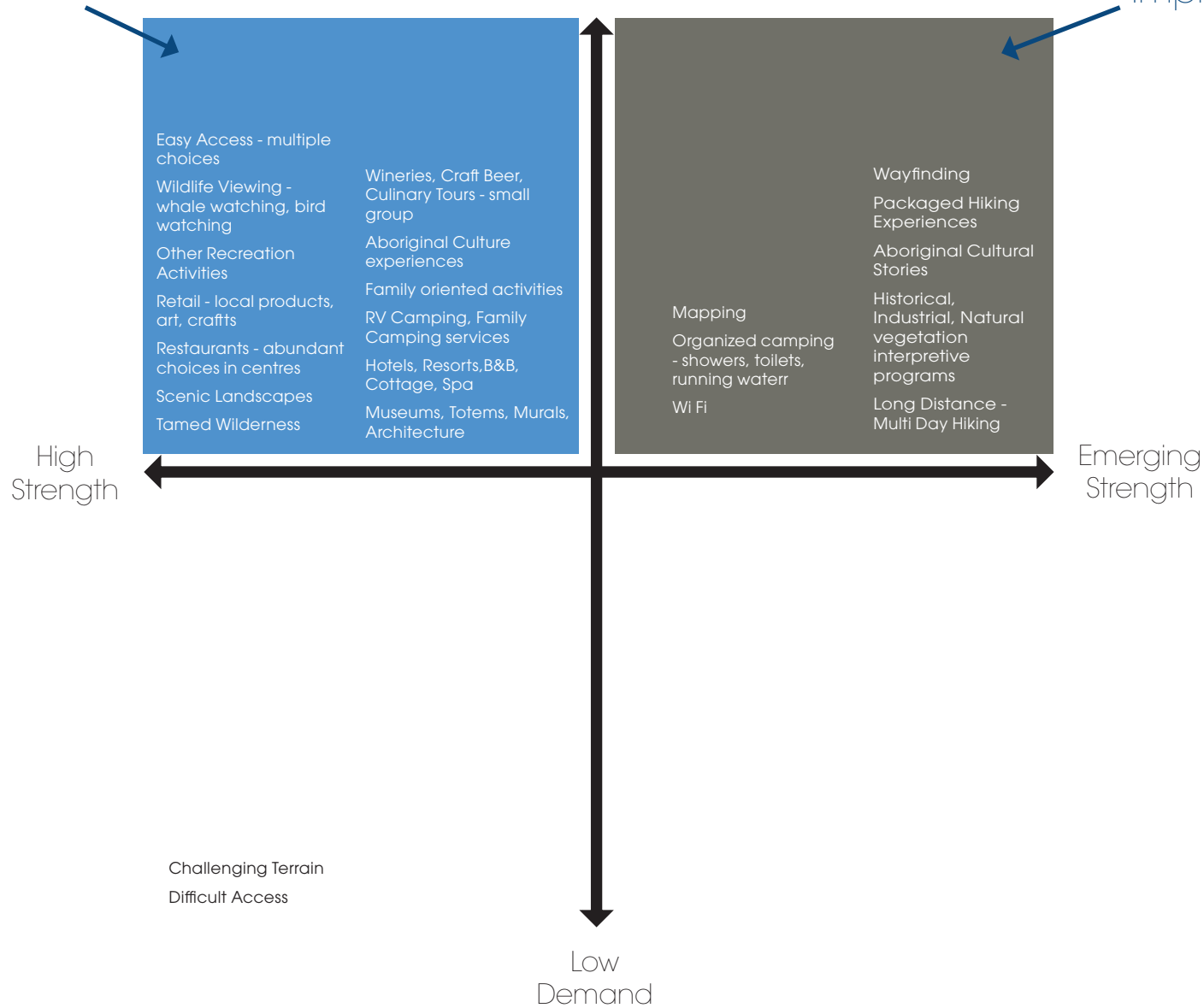
- Improve our trails infrastructure to become exceptional.
- Offer trip planning logistics.
- Improve trails information and wayfinding.
- Create infrastructure programs.
- Increase Accommodation choices & supply.
- Create or enhance amenities, transportation & other services (restaurants, retail, tours, attractions, guides, water taxi) to support hiking destinations.
- Coordinated and consistent marketing and messaging.
- Coordinate stakeholders.
- Coordinate management funding.



Ideal Situation

High Demand

Area for Improvement



EXCURSIONS



Ideal Situation

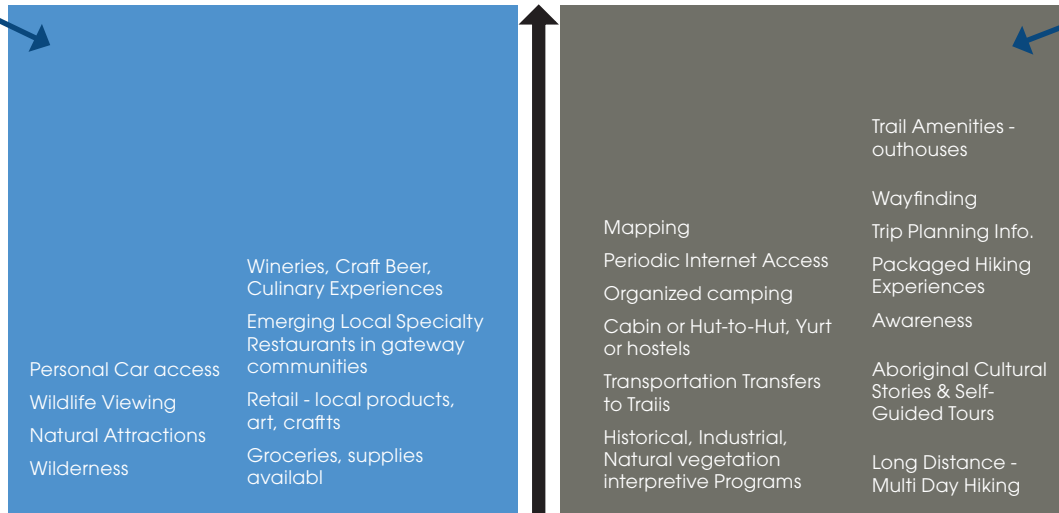
High Demand

Area for Improvement

High Strength

Emerging Strength

Low Demand

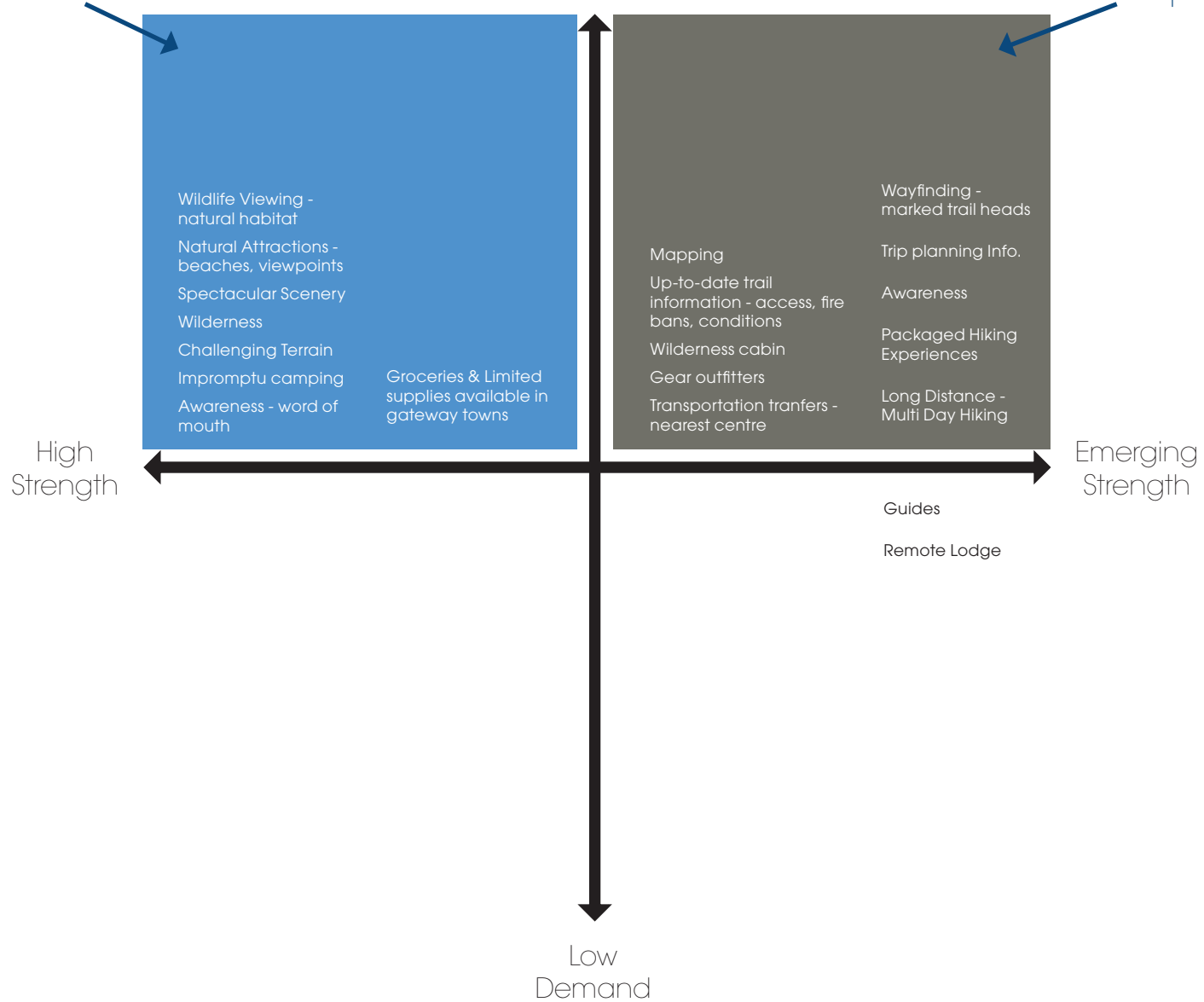




Ideal Situation

High Demand

Area for Improvement



3.9 Current Brands & Marketing

Destination BC recently revitalized the Super, Natural British Columbia brand. Through the process, they learned that travelers generally have positive impressions of British Columbia and want to travel here... someday. However, in a world of increasingly aggressive competition, the province is missing the magnetism needed to motivate travelers to make British Columbia their travel choice. Destination BC also learned that many potential travelers don't see the value in visiting British Columbia. The top reasons people gave for not visiting were:

- Other places seem more interesting.
- BC is too far to travel to.
- BC is too expensive to visit.

Destination BC also learned that for travelers to British Columbia, nature is the magnet. Our topography, from the sea to the sky, sets British Columbia, and the VIC Region, apart. Destination BC discovered that many travelers are drawn to the sheer vastness, abundance and diversity of our nature. While some travelers want to deeply immerse themselves in the nature we offer, others travelers are happy just to "rub-shoulders" with nature. And, what better way to deliver on our travelers desires and help them connect with our nature, than through a network of exceptional hiking experiences. Recognizing this, it was important to review our current hiking experience brands and the marketing strategies used to compel those visitors to choose the VIC Region. The process began by interviewing our hiking tourism partners and stakeholders to determine the VIC Region's strengths, areas for improvement and current success stories.

3.9.1 What We Heard

Our discussions revealed that although the VIC Region has many positive attributes that support hiking tourism, and some well-known hiking experiences, there appears to be a general lack of awareness of the VIC Region as a destination that provides exceptional hiking experiences. Stakeholders identified a number of positive attributes as well as opportunities for improvement:

Positive Attributes:

- Vancouver Island has some well-known hiking experiences, such as the West Coast Trail and Sunshine Coast Trail
- First-Nations offer culture, history, stories, arts, crafts, and performances which are complimentary to hiking experiences
Offer many other experiences that are complimentary to marketing our hiking experiences including: sight-seeing, sea-kayaking, whale watching, festivals, culinary, scuba diving, bird watching, bear watching, and viewing other wildlife
- Wilderness, physical and psychological challenge
- Diversity of landscapes
- Un-crowded areas
- Local geological and natural history
- Coastal experience
- Year round opportunities
- Beaches
- Lakes and oceans
- Forests
- Free access to trails and hiking experiences
- History—logging, mining, railways, fishing, shipping, European settlement

A brand is...

The essence, or personality, of a destination. It makes a destination distinctive, memorable and different from other destinations, in the eyes of the potential visitor.

For travellers to British Columbia, nature is the magnet.

Opportunities for Improvement:

- Markets lack awareness of VIC Region’s hiking experiences
- No coordinated regional hiking experience brand or marketing strategy
- Cross promotion of hiking experiences between regions and DMOs
- No regional online hiking experience trip planning tool
- Enhance the quality, diversity and integration of accommodations with trails
- Amenities and services to support visitors on their hiking experiences
- Lack of sufficient information about hiking experiences

When asked how hiking experiences are currently marketed in the VIC Region, the most frequently referenced approaches included:

- Blogs
- Apps (Trail Forks, Trip Advisor app)
- Clubs (Club Tred)
- Websites (DMO’s, municipalities, blogs, travel writers, e-zines)
- Social media (Facebook)
- Trail maps
- Brochures
- Word of mouth
- Visitor Centres

In addition to the efforts of trails managers and local groups, Tourism Vancouver Island, through partnerships with Destination BC and regional stakeholders, successfully promotes the VIC Region through various program areas including community programs, regional partnership marketing, travel trade, travel media relations and online/ e-marketing.

3.9.2 A Closer Look According to the Path to Purchase

Regardless of which market segment we are trying to reach, it is widely accepted that travelers follow a relatively common pathway to making their purchasing decisions. From the first learning about a destination, to dreaming about their trip, visualizing themselves at the destination, researching it and finally making a purchase decision, it is imperative that destination marketers are reaching and inspiring travelers at each stage along the path to purchase. By better understanding where potential travelers are along the path to purchase, we can better align marketing efforts to better target the needs of travelers. It has been shown that potential barriers that arise between ‘consideration’ and itinerary ‘planning’ can be positively influenced by marketing activities.²⁷

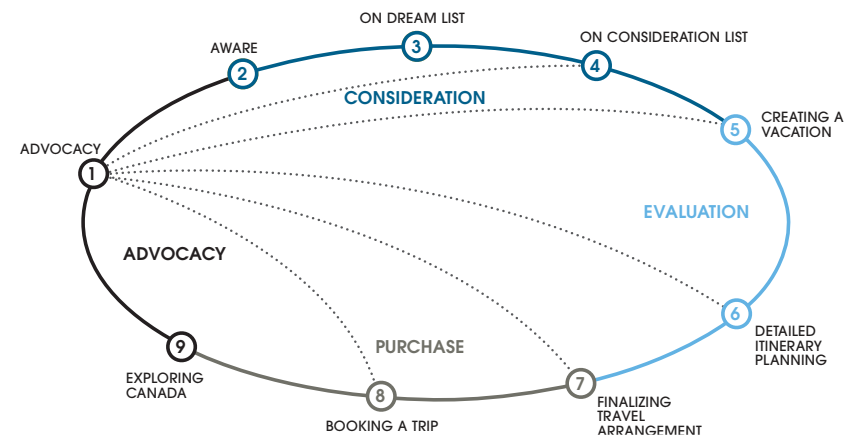


Figure 13 Marketing along the Path to Purchase²⁸

The key stages in the path to purchase are:

- **Aware**—travelers receive marketing messaging or search for information on potential destinations.
- **On Dream List**—travelers become engaged at an emotional level and become inspired about the destination.
- **On Consideration List**—travelers begin to make a connection between inspiration and meeting personal interests, needs, and motivations.
- **Creating a Vacation**—travelers picture themselves at the destination engaged in the desired activity or activities.
- **Detailed Itinerary Planning**—At this point in the process, travelers may consider the destination as a strong option and move into identifying and analyzing trip planning logistics.
- **Finalize**—travelers work out travel logistics to the destination.
- **Finalizing Travel Arrangement**—travelers book their trip.

The 'path to purchase' in conjunction with the 'hiking experiences typologies' (see Table 6) allows destination marketers to target travelers who are booking a trip & exploring at each stage of the path to purchase with compelling messages that are tailored to the travelers desired hiking experiences. To look more closely at current brands and marketing approaches, internet key word searches, stakeholder interviews and MindMixer were used to identify some of the most successful hiking tourism trails and associated brands in the VIC Region. Three trails, representing each of the three hiking experiences types, were examined more closely:

- West Coast Trail—Epic
- Cape Scott Park Trails—Ranging from Strolls to Excursion to Epic Hikes
- Galloping Goose Regional Trail—Stroll

The goal is to align marketing efforts targeting travelers at each stage of the path to purchase with compelling messaging that is relevant and appealing to the hiking experience type offered. Table 6. summarizes how to apply appropriate marketing to each phase as a traveler progresses through the Path to Purchase.

Through analysis for each of the marketing approaches for each of the trails, it appears as though current marketing inconsistently targets travelers at each stage of the partway to purchase. Most readily available marketing materials target visitors at the planning stage. There is great opportunity to truly target travelers throughout their entire journey toward choosing the VIC Region as their next hiking tourism destination. In addition, it was clear that integrated trip planning tools, allowing visitors to easily book each of the 5 A's—attractions, activities, accommodations, access and amenities was not available. Improved integration will remove barriers and enhance the ease with which travelers can reach the purchase stage of the decision making process. Making this process easier for travelers to traverse the path to purchase will yield more conversions from the planning stage to the actual purchasing stage.

Trip Planning Differences: Front-Country versus Back-Country

Trip planning logistical and technical needs will vary significantly for travelers to front-country versus back-country hiking trail systems. The consequences of limited 'awareness' of critical information may be more severe for a back-country traveler who is insufficiently prepared for rugged, uninhabited wilderness with challenging trail conditions. The 'attractiveness' of a hiking trail system is dependent upon presenting appropriate experiences in alignment with the interests and motivations of the traveler (family social stroll, versus epic wilderness journey). 'Access' to a trail system influences the motivation of the traveler to overcome travel logistics or challenges. For example, if there is sufficient 'attraction' (iconic hiking trail) to a destination trail system, then travel challenges may be mitigated (people may be willing to put up with insufficient options if they really want to visit the destination). Access to information and transportation options is important. 'Accommodation' options also need to be in alignment with the type of experience a traveler is seeking. Front-country accommodations typically present a wider range of options due to proximity to population centres. Back-country accommodations for trails may range from rustic camping, to huts, yurts, or cabins, to luxury back-country lodges or 'glamping' experiences. Trip experience motivations and available (albeit, more limited options) are key to decision-making for travelers.

Table 6 Applying Marketing Strategies by Path to Purchase Stage

PATH TO PURCHASE MARKETING ATTRIBUTES		VANCOUVER ISLAND TRAIL EXAMPLES		
		Stoll	Excursion	Epic
		Galloping Goose Trail	Cape Scott Park Trails	West Coast Trail
Path To Purchase	AWARE Information Channel Preferences	Info Centres Web Searches Capital Regional District Website Word of Mouth Social Media	↔ capescottpark.com	Guidebooks Niche Magazines/E-Zines/ Travel News Sites Web Searches Travel Blogs Word of Mouth Social Media
	DREAM Elements which Inspire	Gentle Pathway View Nature Developed Pathway Easy Access	↔	Rugged Wilderness Uninhabited Viewscapes Personal Challenge Extreme Moments (GoPro!)
	CONSIDER Desire Triggers	Socialization ↔ Gentle Escape Call to Action	↔	Challenging Escape Iconic Attraction/Bucket List Call to Action
	VISUALIZE Creation of a Personal Vacation Movie	Socialization Dream & Consider merge to visualize the full adventure	↔	Status Dream & Consider merge to visualize the full adventure
	PLAN	Websites	Websites Tour Operators	Websites
Trip Planning	5 A's	5 A's	5 A's	5 A's

There is great opportunity to improve marketing to visitors at each stage of the path to purchase

How do hikers find Vancouver Island Trails?
“Word of mouth, past experience and the BC Parks map are the most common information sources respondents would use to plan an outdoor recreation outing.”²⁹

Epic Hiking: West Coast Trail

The West Coast Trail is the most famous hiking trail in the Vancouver Island/Sunshine Coast region, known as a 'challenging', 'epic', 'bucket-list' trek which attracts hikers globally. Originally named the Dominion Lifesaving Trail, this 75 kilometre, multi-day trek on the west coast of the Island is managed by Parks Canada. Due to the popularity of this hike, the total allotment of permits to access the trail are fully-subscribed each year (thus indicating the potential to develop similar trails in the VIC Region). Permits and reservations fees apply at the time of booking, although 'stand by' access is also permitted. Analysis of internet-based resources shows a diversity of information resources available regarding the trail, albeit; with limited coordination of marketing activities. Given the popularity of this trail, there are a large number of web-based resources available online.

- Parks Canada, 2016. The West Coast Trail: Hike of a Lifetime. Retrieved February 9, 2016 from <http://www.pc.gc.ca/eng/pn-np/bc/pacificrim/activ/activ6a.aspx>
- Tourism Vancouver Island, 2016. Pacific Rim National Park Reserve. Retrieved February 9, 2016 from <http://www.vancouverisland.travel/regions/pacific-rim/pacific-rim-national-park-reserve/>
- Destination British Columbia, 2015. Vancouver Island, Hiking, West Coast Trail and Coastline Hikes. Retrieved February 9, 2016 from <http://www.hellobc.com/vancouver-island/things-to-do/outdoor-activities/hiking.aspx>
- Wikipedia, 2015. West Coast Trail. Retrieved February 9, 2016 from https://en.wikipedia.org/wiki/West_Coast_Trail
- West Coast Trail Express, 2010. Welcome to West Coast Trail Express Inc. Retrieved February 9, 2016 from <http://www.trailbus.com/>
- Trip Advisor Canada, 2016. West Coast Trail. Retrieved February 9, 2016 from https://www.tripadvisor.ca/Attraction_Review-g3677881-d208398-Reviews-West_Coast_Trail-Victoria_Capital_Regional_District_Vancouver_Island_British_Colu.html
- Trail Peak, 2015. West Coast Trail. Retrieved February 9, 2016 from <http://www.trailpeak.com/trail-West-Coast-Trail-near-Victoria-BC-524>
- Sooke Region Tourism Association, 2016. The West Coast Trail. Retrieved February 9, 2016 from <http://sooke-portrenfrew.com/west-coast-trail/>
- Ditidaht First Nation (N.D.). West Coast Trail Comfort Camping, Recreation in the Nitnat Region. Retrieved February 9, 2016 from <http://www.ditidaht.ca/parks--recreation/>
- Aboriginal Tourism Association of British Columbia, 2016. The West Coast Trail. Retrieved February 9, 2016 from <https://www.aboriginalbc.com/members/the-west-coast-trail/>
- All Trails, 2015. National Geographic. The West Coast Trail. Retrieved February 9, 2016 from <http://alltrails.com/trail/canada/british-columbia/west-coast-trail>
- Parksville Qualicum Beach Tourism, 2016. West Coast Trail Express. Retrieved February 9, 2016 from <http://www.visitparksvillequalicumbeach.com/find-west-coast-trail-express>

Stroll, Excursion and Epic Hikes: Cape Scott Park Trails

Internet resources on the hiking trails at Cape Scott Park and the North Coast Trail present a model of clear, concise information for visitors planning a trip to the North Vancouver Island Region. The Cape Scott Park website, more specifically, assists visitors to easily understand a range of trail options available to most levels of hikers.

1. The North Coast Trail is a 'Back-Country Adventure' attractive to ATTA 'Enthusiasts'. Key attributes: rugged, challenging escape.
2. The Cape Scott Trail is a 'Mid-Country Excursion' attractive to ATTA 'Adventurers'. Key attributes: moderately rugged, moderate escape.
3. The San Josef Bay Trail is a 'Front-Country Stroll' attractive to ATTA 'Grazers'. Key attributes: day trip, relatively gentle, retains sense of wilderness.

- Cape Scott Park, 2016. Cape Scott Park and the North Coast Trail. Retrieved February 9, 2016 from <http://www.capescottpark.com/>
- BC Ministry of Environment, 2015. Hiking in Cape Scott Provincial Park. Retrieved February 9, 2016 from http://www.env.gov.bc.ca/bcparks/explore/parkpgs/cape_scott/hiking.html
- Tourism Vancouver Island North, 2016. Hiking. Retrieved February 9, 2016 from <http://www.vancouverislandnorth.ca/things-to-do/outdoor-adventure/hiking/>
- Trail Peak, 2015. Cape Scott Trail. Retrieved February 9, 2016 from <http://www.trailpeak.com/trail-Cape-Scott-Trail-near-Port-Hardy-BC-6071>
- North Coast Trail Shuttle, (N.D.). North Coast Trail Shuttle. Retrieved February 9, 2016 from <http://www.northcoasttrailshuttle.com/Cape.Scott.North.Coast.Trail.Information.html>

Stroll Hike: Galloping Goose Trail

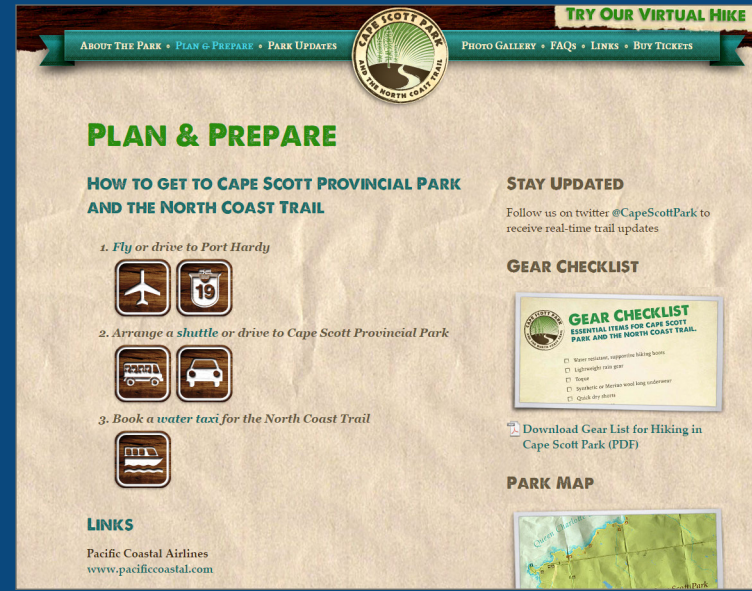
Formerly a railway line, the Galloping Goose Regional Trail attracts many local walkers, hikers, cyclists, and equestrians, as well as visitors looking for an easy, picturesque stroll. Internet resources on this trail are more limited to information provided by local interests.

The Galloping Goose Regional Trail is classified as a 'Front-Country Stroll' attractive to ATTA 'Grazers' with easy access for local recreationists and potential appeal for tourists. Although primarily used as an inter-city commuter track or inter-neighbourhood stroll, it has the potential to be marketed as part of a longer distance hiking/cycle route connecting to other gateway towns.

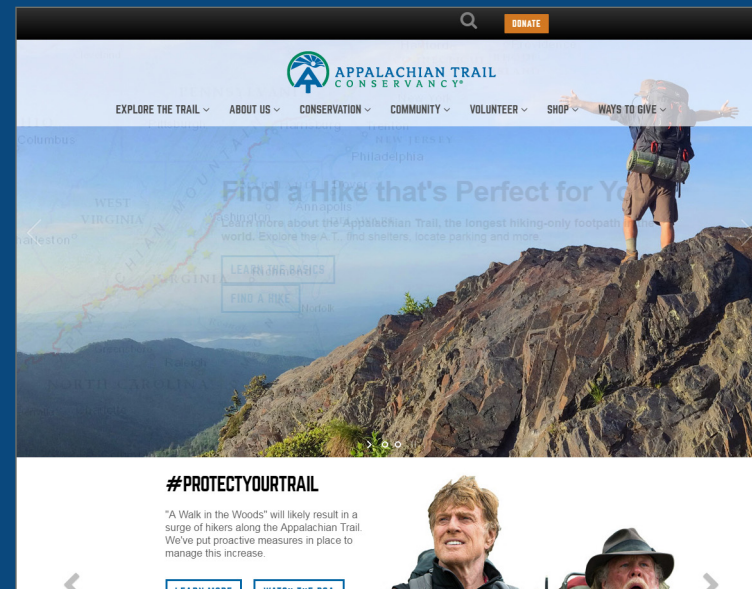
- Capital Regional District, 2015. Galloping Goose Regional Trail. Retrieved February 9, 2016 from <https://www.crd.bc.ca/parks-recreation-culture/parks-trails/find-park-trail/galloping-goose>
- Tourism Victoria, 2012. Galloping Goose Regional Trail. Retrieved February 9, 2016 from <http://www.tourismvictoria.com/listings/Galloping-Goose-Regional-Trail/65096/>

Promising Practices

The **Cape Scott Park** trail systems represented by the capescottpark.com website, presents a regional example of some best practices in marketing activities which encompass many of the key attributes of our 'path to purchase marketing attributes framework' and the 'trail experience typologies'. Descriptions and imagery provides inspiration messaging in alignment with 'path to purchase' attributes; then, transitions well into 'trail experience typology' and '5 A's' attributes necessary to bridge the transition to address logistical and technical needs of travelers.



The **Appalachian Trail Conservancy** representing the appalachiantrail.org website provides a significantly more comprehensive example from a much larger trail system traversing multiple geopolitical jurisdictions. This website is heavily weighted towards providing trail experience, logistical, and technical information. Well known as an iconic trail system in the United States, 'path to purchase' oriented marketing activities build on the momentum of current awareness of the trail system as an attraction, along with ready access to many other websites providing inspirational marketing messaging and imagery as found in the American Classic: Hiking the Appalachian Trail.³⁰



4. The Way Forward

4.1 Vision

IMAGINE...

From easy strolls, to enjoyable excursions and challenging epic adventures, the Vancouver Island and Coast Region is recognized by domestic and international travelers alike as Canada's premier year round hiking tourism destination. Hiking tourism is positively embraced by our local residents and is a significant contributor to our economy as visitors stay longer, spend more and return more often. Trails organizations, land owners, tourism industry and government are working collaboratively to plan, develop and manage the region's network of exceptional hiking experiences in ways that share the stories of First Nations and our peoples while minimizing impacts to the environment.

4.2 Goals

The overall goal of the Hiking Tourism Master Plan is create a network of exceptional hiking experiences complete with a common vision and approach to planning, managing and marketing our hiking experiences across multiple layers of government, and organizations involved with trails in the VIC Region. More specifically, our goals are to:

- 1. Deliver exceptional hiking experiences.**
- 2. Increase visitation, length of stay and spending by both destination hikers and the touring market.**
- 3. Create Positive Relationships between industry (business), DMO's, private land holders, governments, First Nations, visitors and residents.**

"The human element of the tourism experience is fundamental to achieving success as a desirable place to visit"
(Gaining the Edge, 2012)

4.3 Our Unique Selling Proposition

With hikers travelling to many parts of BC and other destinations globally, competition for visitors is fierce. Now that we have analyzed our trails tourism experiences, and understand the needs, interests, and motivations of our target markets, we will need to work at differentiating our experiences from the competition. People are coming from all over the world to the VIC Region for our breath-taking natural beauty. Along with the possibility of chance encounters with wildlife. Our unique geography, culture, peoples and temperate rainforest climate offers a number of distinctive trails qualities and experiences to build our unique selling proposition. Our competitive advantages within the VIC Region are:

- Our coastal hiking experience makes us different than most other hiking destinations in the Province.
- We have hiking routes through a wide range of scenic landscapes that are easily accessible in a relatively small geographic region including coastal rainforest, alpine and urban areas that are available all year round.
- Our trails are not crowded and (most) are free of charge.
- Our wilderness trails offer something for everyone—through beginner to intermediate to challenging hikes and therefore; have the potential to become a hiking mecca in BC.
- First Nations and their history and stories present opportunities to share cultural experiences and traditional knowledge on Vancouver Island.
- We have a number of natural and cultural attractions such as winery tours, craft breweries, ancient forests, agricultural products, cultural and industrial history, as well as other recreation activities that enhance our hiking experiences.
- We have two UNESCO biosphere reserves.
- We offer marine wildlife viewing, bird watching and chance encounters with other wildlife.
- First Nations traditional knowledge is abundant and available.
- Our trails have good access to safety and emergency services.

It is clear that we offer a large number of hiking experiences spread across the VIC Region, however; the majority of them are not ready to be marketed as tourism experiences. A few trails have been established as destination hikes and are being marketed individually, including The West Coast Trail and Sunshine Coast Trail. However; most hiking trails experiences have developed ad hoc, over time through local use. Within the VIC Region itself, the challenge will be to develop and market a network of exceptional hiking experiences that are unique to a particular region and landscape. The VIC Region is diverse. We need to be deliberate in acknowledging and leveraging our sub-reigonal uniquenesses and creating distinct visitor experiences that reflect those characteristics. Particular attention must be paid to avoiding the development of a homogeneous network of hiking experiences. Each region ought to focus on embracing its competitive advantage and avoid trying to be "everything to everyone".

"First Nations have used trails for travel and acquiring sustenance since the beginning of time. Early European explorers and settlers to British Columbia relied on these already established trails and added to their unique histories." Furthermore, many First Nations communities are actively engaged in protecting and managing trails, and promoting responsible trail use that respects their cultural values.³¹

4.4 'Exceptional' Hiking Experiences

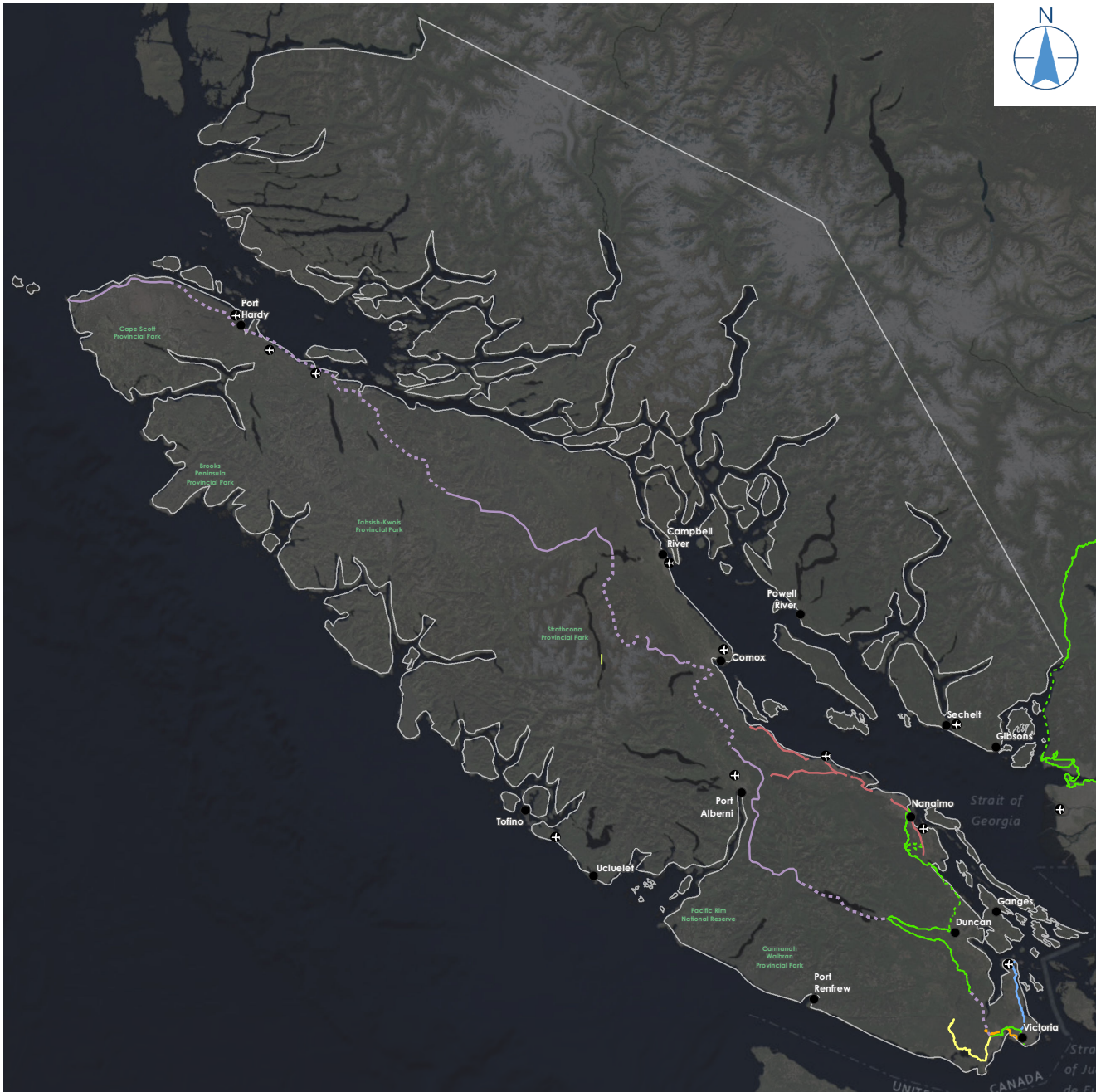
As we shift from selling tourism products, and embrace the need to develop and sell experiences, there is shift from tourism 'products' towards 'experiences', there is potential to create distinctive hiking experiences that create a sense of place and unique memories. In Canada, Destination BC's strategy seeks to foster "remarkable" experiences³², described as "a compelling experience that differentiates BC in a competitive tourism marketplace and encourages word of mouth". These experiences are the heart and soul of our tourism zones and represent the highest achievement standard. Their unique iconic experiences have the potential to increase awareness of a particular destination through positive word of mouth, create a strong brand personality and attract significant tourism spending. Tourism Vancouver Island supports the need to create distinction among our hiking experiences that will set us apart from other regions in BC. Exceptional hiking experiences appeal to the touring and exploring market as well as to destination hikers who wish to experience the best hikes that the region has to offer.

"Exceptional" hiking experiences in the VIC Region can be described as individual iconic trails, or multi-day, long distance Strolls, Excursions or Epic adventures that are packaged with accommodations, services and amenities to meet target market expectations. Our trail partners have indicated that market demand for these trail experiences are on the rise, and are an area of potential hiking tourism growth within the VIC Region. Currently there are only a few of these types of hiking adventures offered in the VIC Region. A similar island to island hiking experience is being developed through the Experience the Gulf Islands with water taxi service proposed to transport visitors. The touring and exploring market will also be interested in having a 'taste' of the best of the best hiking trails and will naturally gravitate to unique or themed or iconic hiking experiences if they are aware of them. Travelers in the touring and exploring market may be interested in taking in a 'piece' or a part of a long distance, multi-day hike. Some hut-to-hut or multi day hikes are broken up into manageable parts that can be hiked over several hours or in a day trip such as along the Sunshine Coast Trail or the Spine Trail on Vancouver Island.

Other opportunities to promote exceptional hiking experiences and build hiking tourism occur where clusters of hiking trails are located around a particular urban centre, gateway town or resort community. In this way, the touring/exploring market visitor will also be satisfied with a number of easy to moderate day hikes to choose from, that don't require pre-planning or special gear and are easily accessible from a single destination.

What Are Exceptional Hiking Experiences?

- Our highest achievement standard
- They offer a compelling and memorable experience that is distinctive and encourages word of mouth
- Are unique destinations and iconic experiences
- They have a strong brand personality
- They meet our target market needs
- They are packaged with accommodations services and amenities



Legend

-  Study Boundary
-  Major City
-  Operational TCT Trail
-  E&N Trail
-  Existing Spine
-  Future E&N Trail
-  Future Spine
-  Galloping Goose Trail
-  Lochside Trail
-  Nanaimo Regional Trail
-  Proposed TCT Trail

0 30 60 Kilometres

Figure 14 Major Trail Network

Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community, Esri, HERE, DeLorme, MapmyIndia, ©OpenStreetMap contributors, and the GIS user community



4.5 Hiking Experience Zones

To assist in differentiating the VIC region according to its strengths, we have assembled Hiking Experience Zones. A hiking experience zone is a geographic area consisting of a concentration of complementary hiking trails that are closely linked in terms of the hiking experience they facilitate and the markets they attract. These zones serve as a point of focus, signaling the primary hiking experience objectives for the geographic area. Zones are established with purposeful consideration of our target markets' primary travel motivations and the sub-region's unique selling propositions. Zones are intended to stimulate the creation of itineraries. Itineraries could also be developed that include multiple zones. Though the zones are spatially explicit, they are not intended to exclude or create division between communities nor do they communicate official land management intent agreed to by land management regulators. Instead, the zones should be viewed as permeable areas that communicate a focus for those working to advance the hiking tourism sector based on what will be of interest to target markets.

Spatial patterns emerging from our analysis of hiking trail experiences show that hiking experiences are generally clustered in particular locations, based on the landscape geography, settlement patterns, and the potential to meet motivations of specific target markets.

We recognize that each zone can and does provide all three hiking experiences and therefore the map is not intended to be exclusive. The zoning map takes into consideration destinations where trails are clustered and which offer a choice of easy-to-access short term hiking experiences. In these cases, travelers are motivated to visit various destinations, including resort areas and are keen to take in hiking in addition to other recreation activities, cultural and natural attractions. Based on traveler expectations, and the concentration of existing hiking trails types, communities within or near each zone are able to 'specialize' in the types of experiences they choose to market and support. This helps prioritize resources and fine tune supporting services, amenities and accommodations to suit visitor needs.

Existing Epic adventure hikes are typically concentrated in remote areas of coastal rainforest or in alpine settings. The Sunshine Coast Trail experience offers a mix of strolls and excursion experiences along its length. These can attract destination 'excursion' hikers interested in more hut-to-hut hikes with cultural attractions and focused around urban centres or gateways. Excursion hikers may be motivated to travel along themed routes and interpretive trails with appropriate accommodations and significant attractions. Long distance hiking trails may also appeal to the touring market who would take in a 'piece' of the trail during their visit. Other long distance hiking "strolls" experiences have the potential to be concentrated along the east side of Vancouver Island along our urban corridor and between the Gulf Islands.

Long distance destination 'Strolls' experiences may be similar to 'Excursions' in that they originate in urban centres and appeal to a more cultural traveler. These may be combined with cycling, over longer distances to achieve a 'town to town' hiking experience and may even become a 'cross island' off road link. Destination 'Strolls' offer travelers the potential to use parts of the hiking trail to link to or access other easy, short distance hikes clustered near an urban centres such as within the area surrounding Nanaimo or the Cowichan Valley. In these cases, long distance trails become a part of an urban centre's active transportation network or a part of the touring market attractions and may offer a number of accommodations choices, restaurants, amenities and cultural attractions along the way. Examples of these may be the Galloping Goose Trail, Lochside Trail, E&N Trail, Trans Canada Trail, and the Vancouver Island Spine Trail.

The VIC Region has the potential to support hiking tourism for all three hiking experiences typologies. The benefit of taking a hiking tourism zone approach is that it allows each area to excel in what it can best provide in terms of trails experiences. These potential tourism zones are shown generally in the following map.

A hiking experience zone

is a geographic area consisting of a concentration of complementary hiking trails that are closely linked in terms of the hiking experience they facilitate and the markets they attract.

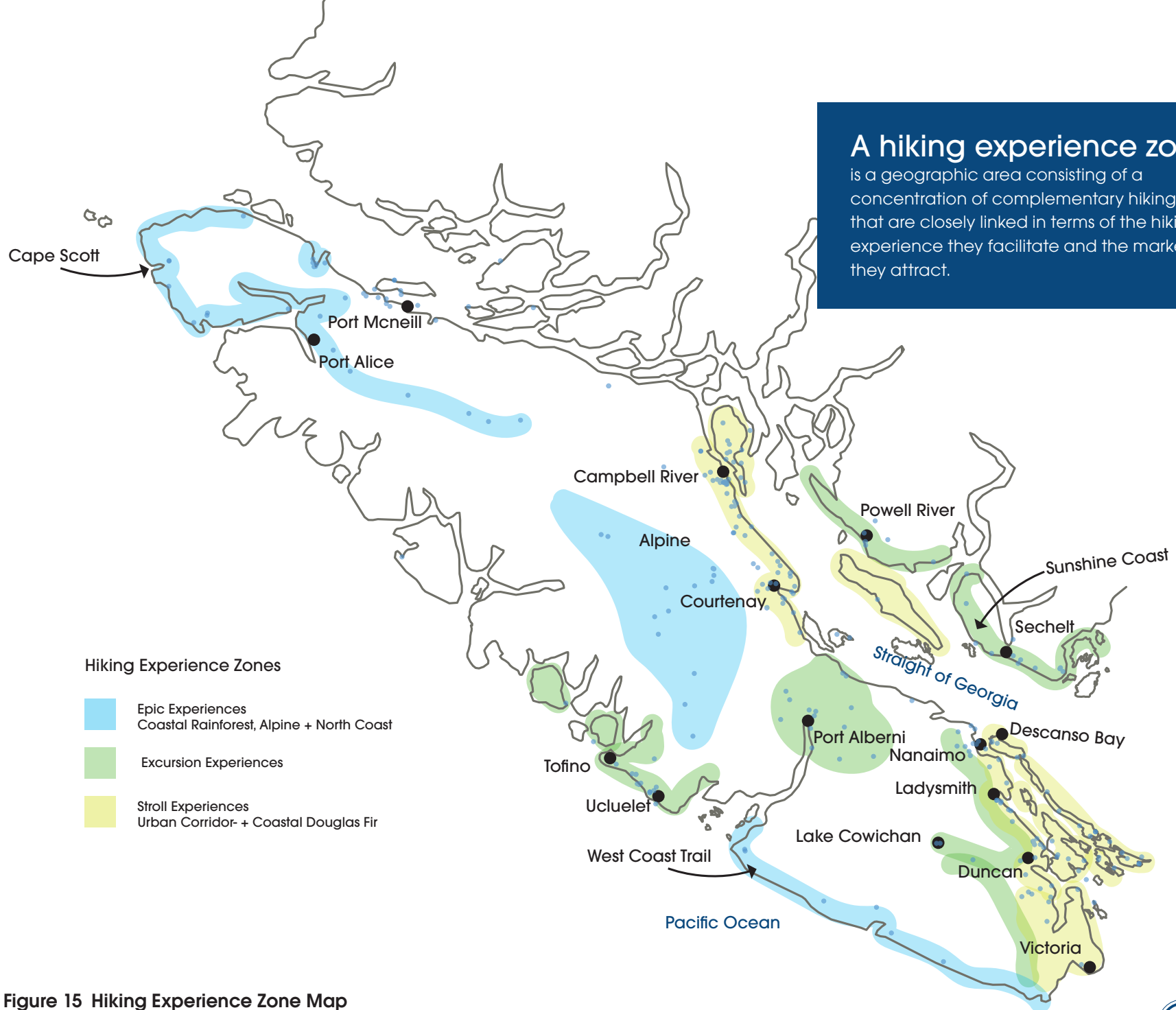


Figure 15 Hiking Experience Zone Map

4.6 Creating Our Exceptional Hiking Experience Network

One of the most practical strategies to meet target market opportunities, will be to address our need as a region to bring a number of existing trails up to market ready standards for the touring and exploring market as well as the destination hiker. The VIC Region has the potential to create an “Exceptional” Hiking Experiences network to help realize its full hiking tourism potential. A network of exceptional hiking experiences will be identified from each governing Regional District of Vancouver Island, the Sunshine Coast, Broughton Islands, Discovery Islands and the Gulf Islands in collaboration with local and regional governments and other trails partners who could leverage funding towards these initiatives.

This may be best achieved by establishing a working group led by Tourism Vancouver Island, to support implementation around the goal of improving existing trails to become suitable for tourism. Tourism Vancouver Island is a key resource for regional tourism operators and stakeholders to collaborate and effectively leverage tourism experience development and marketing opportunities and could help to facilitate a regional selection of trails as priorities for enhancement among trails partners.

There is room to increase the awareness, quality of and number of “Strolls, Excursions and Epic” hiking experiences and their supporting destinations. To guide us forward, destination development, destination management and destination marketing strategies and actions have been identified based on input from our hiking trails partners and through gaps identified during our experience market match analysis.

Hiking Tourism Strategies

1. Enhance existing hiking experiences to become ‘exceptional’;
2. Create an interpretive, storytelling framework;
3. Provide the right accommodations and amenities to support our ‘exceptional’ hiking experiences;
4. Build awareness of the ‘Exceptional Hiking Experiences Network’;
5. Maximize the positive benefits of tourism while minimizing the negative impacts on the environment, First Nations and host communities;
6. Ensure ‘exceptional’ hiking experiences are well managed and safe;
7. Maintain an up-to-date inventory database of hiking trails and trail attributes;
8. Make it easier to access the “Exceptional Hiking Experiences’ network’;
9. Establish Sustainable sources of funding;
10. Collaborate regionally to negotiate private land access and create partnership agreements.

The success of the Hiking Tourism Master Plan will no doubt depend on the successful collaboration between hiking trails partners to help us reach our goals. It will be important to carry this momentum over the long term between champions and between jurisdictions as we move forward.

A number of key stakeholders can make a significant contribution to advancing hiking tourism in the VIC Region including the following leading groups:

- Tourism Vancouver Island, Destination BC and local Destination Marketing Organizations
- Provincial, Regional and local municipal governments and First Nations
- Hiking Trails Groups: VISTA, BC Trails Society, E&N Trails Society, Trans Canada Trails, Federation of Mountain Clubs, Accessible Wilderness Society, Wild Pacific Trail Society, Sunshine Coast Trail Group, Experience the Gulf Islands, Gabriola Land and Trails, and others.
- Private Land owners

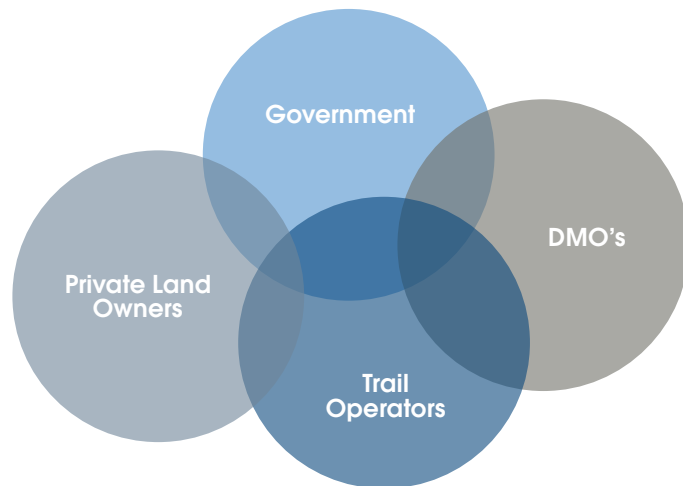


Figure 16 Key Stakeholders

Implementation of key strategies and action will be required in order to achieve an "Exceptional" Hiking Experiences Network. Some will be easy to accomplish and others will take time while collaborative groups become established and funds are raised. The short, medium and long term priorities for each are indicated using the following symbols:

- ST Short Term (1–5 Years)
- MT Medium Term (5–10 Years)
- LT Long Term (10+ Years)

4.6.1 Destination Development Recommendations

To transform and distinguish various hiking trails into “Exceptional” hiking experiences will take leadership, collaboration and a number of hiking trails partners. Municipal and regional district trails managers will need to take a leadership role along with Tourism Vancouver Island in enhancing hiking trails infrastructure in the VIC Region. This role will need to be articulated along with identifying supporting trails groups, agencies and funders within the working group who can:

1. Enhance existing hiking experiences to become “exceptional”:

- a. Complete existing long distance hiking trails experiences that are currently underway (Vancouver Island Spine Trail, E&N, Trans Canada Trail, Sunshine Coast, Cape Scott Trail, Experience Gulf Islands etc.). MT
- b. Bring all sanctioned, existing trails up to minimum standards for insurance, access agreements, maintenance monitoring and regulatory signage. ST
- c. Prioritize funding for enhancements on hiking trails that are unique, appeal to target markets, and that differentiate the VIC Region from the competition. ST
- d. Implement a regional selection process to identify priorities for enhancement by focusing on unique trails that have the potential to be iconic or on clusters of trails within easy access of urban centres or traveler destinations). ST
 - i. Identify and select hiking trails experiences with the potential to be “exceptional” – establish hiking trails selection criteria and process to nominate priorities (Strolls, Excursions and Epics).
 - ii. Select ‘exceptional’ hikes (top 10) as an early initial critical mass from which to launch the network. Create management plans to build and manage these over the long term.
- iii. Establish a hiking trails ‘driving tour’ route across the VIC Region, highlighting key hiking destinations and exceptional hikes that starts and ends in Vancouver similar to the Coastal Circle Route, <http://www.hellobc.com/vancouver-island/driving-route>.
- e. Develop “themed” hikes (i.e., Ancient forests, First Nations, Geographic Features, Industrial Landscapes, etc.). ST
- f. Develop “iconic” destination hikes that are intense, memorable, and unique (i.e., Mt. Prevost or Finlayson etc. that can become an Island version of the Grouse Grind in North Vancouver). MT
- g. Identify key cultural destinations that also have clusters of hiking choices that appeal to the touring and exploring, ‘driving’ market. ST
- h. Identify locations for increased accommodations in key hiking destinations that address the ‘driving’ touring and exploring market such as campsites, motels, RV campgrounds. MT

2. Create an interpretive, story-telling framework:

- a. Work closely with First Nations, Aboriginal Tourism BC, heritage groups, governments, industry and trails partners to identify, design interpretive plans and share specific stories that make trails unique. MT
- b. Create a hiking trails and natural features touring route, that touch on key destinations and themed hikes. MT
 - i. Implement interpretive programs for all themed hikes.
- c. Use online, printed signage and / or interactive maps according to market needs and as appropriate to the hiking experience. ST
- d. Partner with education institutions and First Nations, and other trails partners with local knowledge to identify opportunities for environmental, wildlife, historical and cultural learning (i.e., rare or endangered species, climate change, First Nations culture and traditions). MT

3. Provide the right accommodations and amenities to support an 'exceptional' hiking experience:

- a. Encourage the supply of accommodations to be increased, enhanced and integrated / connected with the trails throughout the Exceptional Hiking Experiences Network. MT
- b. Engage with local business to provide connected transportation services, retail, food and beverage, attractions and events that are connected with the 'exceptional' hiking experiences. ST



4.6.2 Destination Marketing Recommendations

It is clear that the VIC Region has a significant number of hiking trails available to visitors. It will be important to market the hiking potential of the VIC Region as a whole; however, it will be necessary to be selective about which hikes can be truly exceptional and deliver on the expectations that come with building a hiking brand. By developing principles of “Exceptional” Hiking Experiences, trail managers, businesses, trails groups, and partners will be able to choose a practical number of trails to focus marketing resources and funding efforts. Led by Tourism Vancouver Island, a professional marketing and communications strategy will be paramount to realizing our hiking potential.

A marketing strategy for hiking tourism could integrate easily with TVI’s current marketing campaigns, to appeal to the hiking and touring market. Engaging with both the touring and exploring market as well as the destination ‘adventure’ hiker will be important in creating awareness of our abundance of trails experiences. One of the most practical strategies to meet these multiple target market opportunities, will be to address our need as a region to bring a number of existing trails up to “market ready” standards for the touring and exploring market. Tourism Vancouver Island is a key resource for regional tourism operators and stakeholders to collaborate and effectively leverage tourism experience development and marketing opportunities.

1. Build awareness of the Exceptional Hiking Experiences Network:

- a. Create an Exceptional Hiking Experiences Network brand. MT
- b. Create a regional marketing and communications strategy to promote the Exceptional Hiking Experiences. MT
 - i. Establish the timeline for implementation, marketing and launch of the ‘exceptional’ hiking experiences marketing plan.

- c. Create a hiking trails driving tour map that highlights key exceptional hiking destinations and themed hikes along a recommended route originating in Vancouver, that runs from the Gulf Islands up the east side of Vancouver Island and across to the Sunshine Coast before returning to Vancouver. This recommended route can be marketed as one of Hello BC’s recommended BC Driving Routes. <http://www.hellobc.com/british-columbia/transportation-maps/driving-routes>. ST
- d. Similar to the Destination Q: Queensland, Australia Masterclass training program for developing innovative experiences. TVI could create a resource to orient employees to the ‘Exceptional Hiking Experiences Program’. ST
- e. Partner with Destination BC and other potential tourism funders to build awareness and marketing materials for market-ready trails in the network. MT
- f. Create an internal - community communications and marketing strategy with positive messaging for local communities on the benefits of hiking tourism and opportunities to connect with travelers (i.e., hold workshops hosted by key destinations to engage local businesses, trails groups and broader audiences). MT
- g. Create an exceptional hiking experiences ambassador program within local communities. MT
- h. Establish a VIC Region Hiking Experiences online “portal” for information and trip planning—the portal could be an independent, stakeholder managed website; a section of the Tourism Vancouver Island website; and/or linked to Destination BC’s HelloBC.com. ST
- i. Create cooperative marketing strategies with Aboriginal Tourism BC, where hiking is supported by the local community and First Nations. ST

2. Maximize the positive benefits of tourism while minimizing the negative impacts on the environment, First Nations and host communities:

- a. Build community awareness for greater capacity and local buy-in for hiking tourism.
- b. Highlight and promote hiking tourism success stories.
- c. Identify key marketing prospectus and incentives to encourage locals and service providers to start new initiatives and businesses integral to building hiking tourism culture.

ST

MT

MT



4.6.3 Destination Management Recommendations

Partnerships and collaboration are key to creating successful hiking destinations and to grow tourism, particularly as hiking trails can potentially cross several jurisdictions. As TVI transitions into the next phase of strategy development, clear, ongoing and meaningful engagement and communications with our trail partners, as well as with the general public, will be essential.

1. Create a management and planning framework for implementation of the Exceptional Experiences Network:

- a. Identify a stakeholder working group to oversee and govern the Exceptional Hiking Experiences program. *(These should be representative organizations with a commitment to implement the recommendations over the long term).* ST
- b. Identify regional boundaries, management structure, partner roles and responsibilities for implementation of the network. ST
- c. Create a hiking economic development plan for key hiking destinations – identify supporting tourism attractions, transportation services, accommodations and other amenities as well as promotional plan for both the touring market and destination hikes. ST
And continue to build capacity for tour packaging over the long term LT

2. Ensure 'Exceptional' hiking experiences are well managed and safe:

- a. Develop management plans for all trails in the Exceptional Hiking Experiences Network. ST
- b. Adopt and implement a consistent visitor education program such as 'leave no trace'. MT
- c. Encourage the development of a "Friends of..." Partnership program and engage with local trails groups and volunteers. ST
- d. Create minimum trails standards/design guidelines for the 'Exceptional' hiking experiences network that is practical, realistic and implementable. Ensure all trails within the VIC Region's exceptional hiking experience network are designed, constructed and managed to these standards. ST

3. Maintain up-to-date inventory of hiking trails and trail attributes database:

- a. Undertake an annual call for trails inventory updates. ST
- b. Evolve the current inventory to include actual trail alignments (GPS coordinates and complete trail). MT

4. Make it easier to access the Exceptional Hiking Experiences Network:

- a. Develop and implement a consistent, branded and identifiable, exceptional experiences network wayfinding framework (trail information, icons, logo and marketing materials). ST
- b. Ensure all trails in the exceptional hiking experience network apply the wayfinding framework. ST
 - i. Establish a wayfinding plan for the top 10 exceptional hikes that includes signage and mapping.
- c. Ensure comprehensive wayfinding plans are in place for all trails that are a part of the Exceptional Hiking Experiences Network (include online, print and hand-held applications). MT
- d. Develop a VIC Region online portal for better trip planning and experience selection with up-to-date information. (exceptionalhiking.com). ST

5. Establish as sustainable source of funding:

- a. Create a catalogue of potential funding sources that support hiking tourism development—grants, private donations, in-kind support. ST
 - i. Identify public/private funding partners (e.g., Tourism Partners for Rural Development, Community Tourism Opportunities through Ministry of Jobs, Tourism and Innovation, Destination BC).
- b. Connect potential funders with trail developers. ST
- c. Work collaboratively with First Nations, Aboriginal Tourism BC and government to support priority initiatives. ST
- d. Secure funding for ongoing management of Exceptional Hiking Experiences Network over the next 5 years. ST
 - i. Secure funding for updating the existing hiking trails database and attribute reporting system annually.
 - ii. Secure funding for the design and development and maintenance of the top 10 exceptional hiking trails.

6. Collaborate regionally to negotiate private land access and create partnership agreements:

- a. Include First Nations, trails groups, regional Government, tourism representatives and other key stakeholders in discussions. ST
- b. Collaborate regionally to keep up-to-date information of trails through private lands, on the web portal. MT
- c. Approach private land holders after regional selection processes have been completed to identify enhanced and exceptional hiking trails. ST
 - i. Achieve the necessary agreements and permits, and insurance are in place to access trails on private lands.

5. Monitoring Our Progress

Ongoing monitoring of meaningful performance metrics provides essential feedback for champions and stakeholders of the exceptional hiking experiences network. Monitoring allows for informed decision making and can draw early attention to emerging issues, successes, product lifecycle evaluation and destination marketing and positioning. Progress will be monitored through the following performance indicators:

Goals	Performance Indicators
Deliver Exceptional Hiking Experiences	<ul style="list-style-type: none"> • Number / length of trails designated into the network • Hiking Experiences - key messages, brand, logo and promotional outreach, website standards • Selection of regional partners, funders & collaborators • Determine implementation strategy & timeline for launch • Number of trails mapped > over 250 (since phase 2)
Create Positive Relationships between Industry (business, DMO's, private land holders, governments, First Nations, visitors and residents)	<ul style="list-style-type: none"> • New business starts • New job numbers • New projects or initiatives identified • Increased Public engagement participants, local media coverage, • Increased volunteers, 'friends of' and trails stewards • Ambassador program • Implementation of Destination management initiatives • New partner agreements with private land owners • Managing committee consists of representatives from all stakeholders • Catalogue of potential funding sources • Funding partners (Aboriginal Tourism BC, First Nations, Wilderness Tourism, environmental orgs, Land Conservancies, health organizations), regional economic trusts (ICET)
Increased visitation, length of stay and spending	<ul style="list-style-type: none"> • Number of visitors coming to Exceptional Hiking Trails • Increased retail spending in hiking destinations • Increased length of stays in hospitality industry, camping, RV sites

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Appendix A Stakeholder Engagement Phase 1

HIKING TOURISM MASTER PLAN STAKEHOLDER ENGAGEMENT NOTES

Appendix A Stakeholder Engagement
May 18, 2016

A.1 SUMMARY OF STAKEHOLDER INTERVIEWS

There are many similar issues between each geographic location and each has also expressed their unique differences.

1. What are our unique qualities that set us apart from other regions in BC?

- We offer coastal hikes and waterfront trails experiences.
- We offer a large number of trails experiences within a relatively small geographic region. (Diversity of ecology – low-land bogs , rugged coastlines, rainforest old growth, agricultural, urban)
- We offer a diversity of trails experiences within a relatively small geographic region with many that are family-oriented.
- Most of our trails are not crowded or over developed.
- Most of our trails are accessible all year around
- Most of our trails are free – (no fees)
- Wilderness trails (nature trails), even minutes from urban centres. (Civilized wilderness)
- Our topography! Many of our trails offer great views of the water and surrounding landscapes – even alpine trails.

2. Key under-developed assets?

- Inter-connected trails and loop trails i.e. Spine Trail
- Multi-day hikes – Front country, easy hikes through a number of towns or destinations. Could also appeal to Cyclists over longer distances i.e. Spine Trail, Cowichan Trail
- Abandoned rail lines – E&N, Cowichan Trail
- Trails through private lands
- Transportation services – connected system from arrival to destination,
- Services and businesses to support hikers

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3. Important Stories or themes?

- First Nations Stories – Trading routes, creation stories, petroglyphs
- Big Tree Route – Ancient forest – Story of Giants (Avatar Grove, Cathedral Forest)
- Settlement History – Cape Scott Trail , trade routes, European Settlers
- Industrial History – mills, mining, timber, agriculture
- Geology/landforms history
- Nature Interpretive
- Coastal Stories - Ship Wrecks, shipping lane transportation routes, cruise ships
- New Castle Island, McLean Mill , Tonquin Trail Story, Trail to Horne Lake and Mt. Arrowsmith

4. Visitation

Although it is not well known if the visitors coming to each region are entirely unique, visitors coming for hiking trails experiences are primarily all coming for the breathtaking natural beauty that the Island coastal and inland alpine landscapes offer. Visitors are most impressed with the number of trails offered and the diversity of experiences that are possible in each geographic area. The main attraction is the wilderness experience with the added opportunity of chance encounters with wildlife.

Many local visitors will take advantage of hiking trails during vacations and quick weekend get-aways. Visitors coming from the Lower Mainland, other parts of the Province and other Provinces generally come for an extended weekend upwards to a week or more in duration. This is mainly due to travel distance, ferry and other travel expenses to get here.

Destination hikers on Vancouver Island are different than other visitors. Hiking trails as destinations appeal primarily to outdoor enthusiasts who are looking for a rugged wilderness experience such as the West Coast Trail, Juan de Fuca Trail, Sunshine Coast Trail or North Coast Trail. Many outdoor enthusiasts are also interested in other attractions or take in hiking experiences as a part of their overall tourism experience without being the sole focus of their trip; however they may not be coming for a particular destination hiking trail experience.

Many people are coming to “get away from it all” and appreciate the uncrowded, free, natural wilderness hiking experience. Travellers coming to Victoria and more urban centres are looking for more front-country experiences. Other attractions drawing visitors are:

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- Winery tours
- Whale Watching and fishing charters
- Gardens and ancient forests
- Markets, agricultural based and local products
- Museums, totems, murals and old architecture,
- First Nations cultural experiences
- Other recreation activities such as fishing, skiing and golfing

Those surveyed agreed that people will continue to be repeat visitors once they have had a taste of the region's trails offerings and other cultural attractions and realize that there is so much more to discover in the region than what they expected. Visitors are generally happy with their hiking experiences. Those who have expressed some disappointments have referred to the following:

- Negative visual impacts of logging
- Difficulty finding their intended destination (look-out point) or trail heads or that trails are not always clearly marked.
- Not enough information around trails (trip planning, or being unprepared for the ruggedness of the trail or terrain).
- Denied access to a previously accessible trail due to de-commissioned logging roads or gravel roads which are not accessible with rental cars.

A common misconception is that you have to be an experienced hiker to get a terrific trails experience. In fact, there is such a diversity of trails experiences offered throughout the region, that there is something for everyone.

Brands and Marketing

There are several hiking trails that are memorable and well-known locally within each area of the region (Sunshine Coast, Gulf Islands and Vancouver Island) however, locals and visitors outside of the region may not be aware of them. Many are not branded or marketed except through local clubs or word of mouth. Some are market-ready for international travelers such as the West Coast Trail, in spite of little marketing. Many interviewees have expressed a need for a regional brand and marketing strategy that would allow them to cross promote hiking trails to visitors coming to their region. (See section 3.3)

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Trails partners have both short and long term objectives for improving trail offerings in their region. Short term goals include improving wayfinding, adding supporting amenities, accommodations and marketing. Some are extending infrastructure that is already in the planning process. Long term objectives include trail partnerships and approvals to complete trail sections that are on private lands or that are lacking funding to complete. Short and long term plans are to have a more organized network of trails that are better supported with local services and accommodations to attract new tourism markets and improved economic development overall.

- Marketing our trails inventory as a cohesive network. Destinations need to get together to coordinate and promote each-others' website for trails regionally
- Improvements to beach access, washrooms and services, garbage cans and downtown infrastructure.
- More Campgrounds, cabins, yurts,
- Europeans especially like smaller family owned hotels. More from Europe than Alberta
- Sherpa van services that pick up/drop off at trail heads
- Markets from Europe attract cultural travelers; more novice hikers as a way to access the abundance of history
- Cyclists spend 20% more on food and drink than hikers – target these trail users
- Convert 'Rails to Trails'
- Create trail clusters / regional and inter-regional connections / and hiking Touring Routes Marketing (similar to marketing clusters: 'Ride the Cariboo', Ski the 'Powder Highway'.

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A.2 BIG IDEAS WORKSHOP NOTES

To help us determine the Vision for Hiking Tourism in the Vancouver Island Region, participants were asked to complete the following sentence:

Imagine it's May 2025, what headlines would you like to read in the local papers about hiking trails tourism on Vancouver Island, Gulf Islands and Sunshine Coast?

Sample Answers:

"Hiking Trails Tourism generates economic and social benefits for local communities"

"Community involvement in trails at an all-time high"

"New epic hiking experiences on Vancouver island"

"Vancouver Island and Sunshine Coast award winner for trails experiences"

Draft Goals were posed to the group. The group was asked whether they agreed with the goals or if they didn't, to note what their concerns were.

- Enhance Existing Hiking Experiences:
- Increase visitation, length of stay and spending:
- Create Positive Relationships between industry (business), private land holders, visitors and residents.

Most were in agreement with these goals; however concerns around losing the fact that trails were not overcrowded or free were raised. Also, not to create experiences just for the sake of tourism. Trails needed to be sustainable, respect environmental best practices and not become over-used.

Raw notes:

TVI Big Ideas Workshop Notes – March 2, Vancouver Island University 1:00-4:30 pm

- 17 attendees

Follow-up:

- Email attendees list to all attendees
- Share workshop presentation
- Share Market Readiness Map, criteria, and list of corresponding trails (i.e.: 17 Export Ready trails)
- Online mapping tool recommendation for plan?
- **Feedback on Trails Experience Types:**
- Terminology: Is "Adventures" or "Epic" an appropriate title to describe back-country/epics?

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- Suggest different title for Adventurers – They are all adventurers
- Like: Green/Blue/Black with sign shape and visual description – pictograms for International visitors
- Visual Landscape Experience: Instead of “clear cutting forest”, call it “Managed Forest”. Visible managed forest.
- Consider dropping “Trails” from “Hiking Tourism Master Plan”
- Typologies Epiphany: Strolls and left of centre Excursions are viable for packaging with secondary activities. Right of centre Excursions and Adventures then to have “Destination Hiking” as a primary travel motivator and may be relatively less interested in secondary attractions and activities.
- Consider Trip duration for adventurers (single day to multi day)
- Key Opportunities (Priority Initiatives):
- Packaging other aspects of the experience using a “theme”
- Themed route, connecting accommodations
- Route theme and length by experience type
- Use local expertise, interpretation
- Branded consistent signage
- More trail networks
- Gnome homes, dinosaurs, themes
- Identify key amenity gaps
- Marketing opportunities on trail (sulfide campaign)
- More trail features and amenities info on web
- Collaborate on key strategies and tactics with ownership amongst key stakeholder
- More rest areas, amenities, camping sites, and accommodations along trails
- Interpretive signage and partnerships with regional partners, working forest, First Nations
- Marketing to local residents, re value and quality
- GPS coordinates
- Better communication and collaboration between stakeholder, promote consistent standards (seamless experiences)
- Youth experiences
- Promote supporting business development
- Blogging for internal marketing
- Promotion of health benefits
- Detailed maps and info by theme, etc...app?
- Stories of trails (history, culture, experiences)
- Quality trail building (businesses, volunteer groups)

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A.3 MINDMIXER

Topic Summary Report

Topic: [Identifying Successful Trail Brands](#)

Which Hiking Trails in the Vancouver Island Region are being marketed the most to travelers?

We are looking to identify key success stories in the Region (Vancouver Island, Gulf Islands and Sunshine Coast).

Ideas **6** Comments **3** Idea Statuses **0**

Top Ideas

Wild Pacific Trail

Blain S | Feb 23, 2016

3Stars
3Comments

West Coast Trail

Ross C4 | Mar 03, 2016

0Stars
0Comments

Vancouver Island Spine Trail - Victoria to Cape Scott

Terence L | Feb 13, 2016

0Stars
0Comments

The Sunshine Coast Trail, Powell River, BC

Jason G11 | Feb 20, 2016

0Stars
0Comments

National & Provincial Parks

Joli W | Feb 22, 2016

0Stars
0Comments



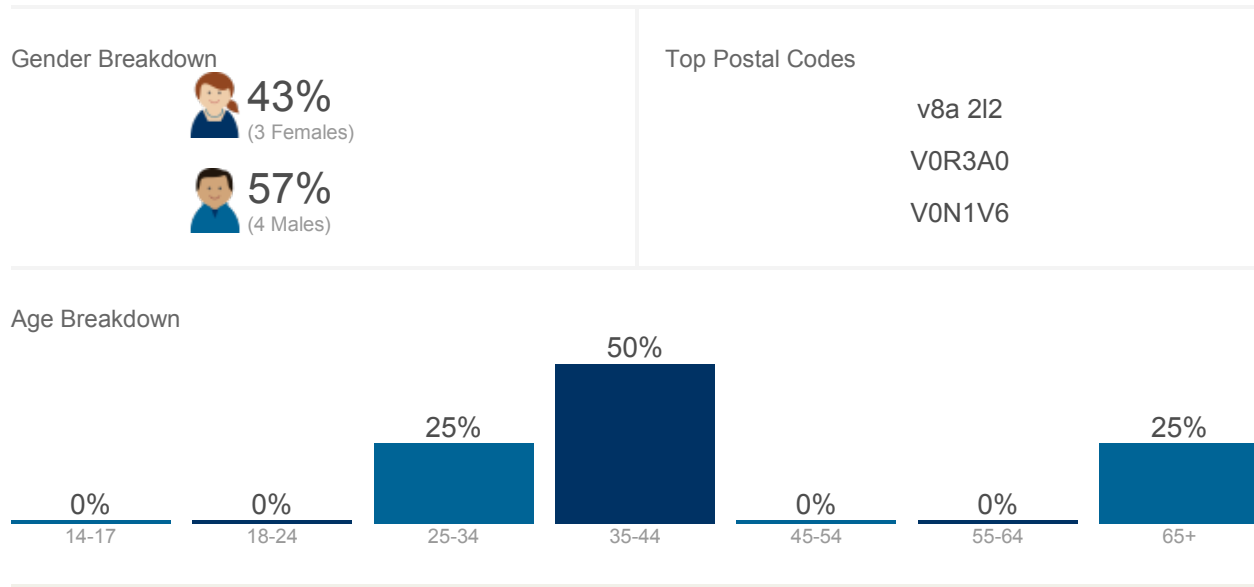
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11% of people participated

(7 of 66 total participants)

75% More than your average and **70% Less** than the MindMixer average



Topic Name: Enhance Our Appeal

Idea Title: Create multi day itinerary options

Idea Detail: easily point out what people want to see - a waterfall, mountain top views, river, old growth forest etc. then from there direct people to several multi day hiking itineraries they can print and use as a reference to plan their trip - we could include places to provision/equipment repair options/gear rental locations/guided tour options/local tips on best time of day or what to be aware of and include hashtags of all the communities so when they are posting their amazing pictures on instagram others can know which community to find these spots in

Idea Author: Chelsea B

Number of Stars 2

Number of Comments 0

Idea Title: Better coordination with accomodation industry

Idea Detail: Advertise more across the region about hiking oportunites on the island. The idea is to have someone stay a few extra nights when they are in our region or plan a return trip.

Hiking may be one reason to do this.

Idea Author: Doug D

Number of Comments 0

1

Topic Name: Competitive Advantages for Trails Tourism



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Idea Title: Let's develop a competitive plan!

Idea Detail: I think one of our greatest competitive advantages for trails tourism right now is the fact that we are in the position to collectively develop a plan to maintain and strengthen our competitiveness. We are blessed with recognized world class trails such as the West Coast Trail, Sunshine Coast Trail, and North Coast Trail as examples. Let's work together and generate ideas for trail/hiking tourism in the regions of Vancouver Island, Gulf Islands and the Sunshine Coast! I'm excited to get the conversation started and to learn what you have to share.

Idea Author: Jody Y

Number of Comments 0

Idea Title: Variety of choices and services

Idea Detail: There are a large variety of trails and geography all within close range. You can also experience a range of destinations from Alpine to beach walks. You can complete multi-day hikes or multiple short hikes within an afternoon. There are also a lot of communities to service trail heads.

Idea Author: Doug D

Number of Comments 0

Idea Title: Year-round use, diversity of authentic experiences

Idea Detail: This region has world class trails in a moderate climate that allows for year-round use. There is a diversity of experiences and opportunities for all users. These range from easily accessible trails showcasing our local temperate rainforests to the rugged reaches where dynamic weather conditions test one's resolve. Experiences are authentic, affordable and available to everyone.

Idea Author: Jason G

Number of Comments 0

Idea Title: Proactive Local Governments

2

Idea Detail: I'm not sure about the rest of the Island but the City of Parksville, Town of Qualicum Beach, and the Regional District of Nanaimo have been proactive with trails development and promotion. They have worked on getting access from land owners to establish a variety of trails and have increased their connectivity.

Idea Author: Blain S

Number of Comments 0

Idea Title: So many options within short radius

Idea Detail: Vancouver Island as a trail destination makes sense as hikers could have lake/river/ocean trail experiences all within days of each other - I think we could create 1-5 day hiking itineraries for Vancouver Island to help map out exact routes/options to promote several options and include several communities

Idea Author: Chelsea B

Number of Comments 0

3

Topic Name: Who is Traveling to the Region

Idea Title: International and regional

Idea Detail: Last year we completed a number of surveys in our parks and were surprised at the number of visitors from outside the country visiting our regional parks. We do very little marketing but they found out about them by word of mouth or brochures at their hotels. The travellers in our region tend to be seeking iconic vistas or nature experiences. They may also

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be passing through for west coast fishing.

Idea Author: Doug D

Number of Comments 0

4

Topic Name: Who Isn't Coming to the Region But Could Be?

Idea Title: wayfinding and access

Idea Detail: some of the trails are not well marked or may be on private lands and often require using logging roads to access the trails.

Idea Author: Doug D

Number of Comments 0

Idea Title: Improve way finding

Idea Detail: •Trail way finding needs to be improved upon. Major trailheads should be well marked with consistent signage.

•Connections to trailheads from or through the developed portions of the region should be as seamless as possible. Expanding local transportation options could help make these connections easier and would make it easier for those who travel to a destination without a personal automobile to get to trailheads.

Idea Author: Jason G

Number of Comments 0

Idea Title: Lack of signage and available maps

Idea Detail: Sometimes the visitor centre struggles directing people to some of the most stunning view points or trails because they pass through private land/property at some point and we don't want to be held liable for directing folks on private property if something did go wrong.

Idea Author: Chelsea B

Number of Comments 0

Idea Title: Visitors need improved access to trail information

Idea Detail: We need to use the latest means (internet, social media, GIS maps, GPS tracks and waypoints, digital imagery) in an integrated fashion in order to fully convey what the possibilities are on VI.

5

As more of the Spine Trail is completed, VISTA (the Association) intends to pursue this, including an improved website with quality information about trail locations; trail conditions and difficulties; and maps, GPS info and imagery that can be downloaded (i.e. rather than in printed form or guidebook) to smartphone or tablet. Details to be worked out!

Idea Author: Terence L

Number of Comments 0

6

Topic Name: Improve Marketing Effectiveness

Idea Title: create multi-day packages

Idea Detail: work with other tourism sector providers to create multi-day packages. IE most regions now have wineries, brew pubs or local markets so consider an itinerary of suggestions of places to hike in the morning combined with a more mellow afternoon/evening experience.

These packages will have to be marketed through advertising abroad.

Idea Author: Doug D

Number of Comments 0

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Topic Name: Identifying Successful Trail Brands

Idea Title: The Sunshine Coast Trail, Powell River, BC

Idea Detail: The Sunshine Coast Trail is a 180-kilometre back country experience that stretches from Sarah Point in Desolation Sound to Saltery Bay. In 1992 a small group of people founded the Powell River Parks and Wilderness Society (PAWS) and started building trails that linked the remaining stands of old growth forests in the region's front country. The Sunshine Coast Trail traverses a wide variety of landscapes, from coastal shorelines, along creeks and lakes, through old growth forests to panoramic mountaintops. It provides hikers with the opportunity to experience Powell River's breathtaking back country with its rich fauna and flora.

Attracting visitors from around the world, this epic trail now boasts 13 huts with one more planned this year, making it the longest hut-to-hut hiking experience in Canada (and the only free one). This is the best outdoor adventure vacation value in North America!

Idea Author: Jason G

Number of Comments 0

Idea Title: Vancouver Island Spine Trail - Victoria to Cape Scott

Idea Detail: VISTA is planning and building a continuous non-motorized trail from Victoria to Cape Scott. It will link up a number of existing trails, use some roads and old roads/rail grades as well as build new linking sections of trail.

South of Duncan it is on the Trans-Canada Trail route. There is a more or less continuous section between the west end of Cowichan Lake and Port Alberni. From Alberni, it first follows the Log Train Trail before climbing up to the Beaufort Mts. crest at Mt. Joan. It then follows a pretty well known route along the Beaufort Crest to Mt. Clifton; from there is new cleared trail and a complex of mountain bike/hiking trails right into Cumberland.

North of Strathcona Park and its trails, planning is underway and the support of First Nations is being sought. The last section to Cape Scott will use the North Coast Trail built a few years ago.

The Spine Trail has the potential to link up with many offshoots along its route; to be a backbone for a VI system.

Idea Author: Terence L

8

Number of Comments 0

9

Appendix B Stakeholder Engagement Phase 2



April 13, 2016 - Realizing Our Potential – Workshop Feedback on the Draft Master Plan for Hiking Tourism – TVI

25 participants ranging from government, trails builders, tourism representatives, timber industry, economic development/chamber of commerce.

23 surveys returned: (see p. 2 for statistics)

- Most participants were supportive of the overall direction that the masterplan provided or were neutral.
- Many would have benefitted from participating in earlier workshops as the information is complex and the process was rigorous.
- Many participants would have benefitted from longer discussion and consideration of the strategies/recommendations in advance of the workshop or be paired with others who had attended previous workshops.
- Only 1 participant was not supportive of the plan

Feedback:

Vision Statement:

- Needs wordsmithing
- Change 'transform' to 'elevate'
- Needs a tag line

Trails Typologies:

- Epic doesn't really capture it: Everyone wants an Epic Adventure, Experience vs. ability, Scenery Epic vs. Steep Epic Experience
- Access through gravel roads is a barrier to access some trails (rental cars,

Unique Selling Proposition

- **Wildlife viewing ie; whale watching, salmon hatchery, shellfish harvesting activity,k**
- **We have 2 UNESCO Biosphere Reserves**
- **Fresh and clean**
- **Good Safety and Emergency Services**
- **Cell service coverage**
- **Local First Nations knowledge**

Tourism Zones:

- Ensure that they are accurately represented
- Map needs clarification or expansion of the zones – purpose of the zones is not clear?

Destination Management:

- How can Islands Trust be involved?
- Perhaps a range of standards (Stroll vs. excursion vs epic) is more realistic than a minimum trails standards. Visitor expectations need to match reality.
- NOT to create a minimum trails standards, BUT rather define and apply a range of standards to cover the full range of reality.
- How do you identify REGIONS? Who sets priorities?
- Identify a leader to move the strategy forward
- New Funding Sources: Premier's initiative for communities smaller than 25,000 for shovel-ready projects (interpretive or trail)
- Need to identify a stable source of funding – provincial contribution (Remarkable Hiking Experiences)
- Priority is to manage what is existing – not to create 'new' experiences
- Develop standards for the 'remarkable experience trails' - for promotion
- Trails standards should set the bar for funding priorities
- Formalize trails maintenance under a regional plan to find funding (provincial standards exist but are not applied/maintained for all trails) Must rely on partnering with other groups.
- **Who creates the management plans? Who leads?**
- Limited resources for maintenance – volunteers are burning out and aging out. See **(ImpactMoneyFinder)**
- Discussion of a user/pay system for remarkable hiking experiences (should be discussed at a provincial level not for individual trails)
- Insurance required to cover trails volunteers
- Need funding/sustainability strategies
- Suggest recommendations for how to get private landowners on board. Make it attractive, by addressing their risks and suggest how your approach will mitigate them.
- Advocate for legislative changes from Province to strengthen 3rd party liability on private lands.
- Provide incentives for private land owners to enter into access agreements.

Destination Marketing:

- "remarkable" is a social media term
- Add simple pictogram to each zone
- Keep it simple
- Include Marketing to Locals
- Ensure messaging is developed to encourage longer stays
- Focus on locals – Create an **Ambassador Program**
- How/Who is going to market the plan? **Implementation?**

- How is buy-in created?
- Interpretive Program: Highlight forestry industry (working forest) and put a spin on the positive
- **Promote a hiking culture through annual events**
- Start with provincial funding for top 10 Vancouver Island Trails

Destination Development:

- Shoreline is a very important Theme
- Opportunity to have hikers coming off the West Coast Trail stay for additional days at a comfy resort
- Ensure amenities are in place
-

Hiking Tourism Master Plan – Tourism Vancouver Island

Workshop Participant Survey

SUMMARY

1. **Do you see a benefit for your community or organization to be involved in a regional hiking tourism destination master plan?**

Most saw a benefit for being involved in a regional hiking tourism master plan

Yes absolutely!	I think so	Not Sure	Not Really	No Way!
°15	°4	°4	°0	°0

2. **Do you generally agree with the Potential Tourism Zones as proposed?**

Most participants agreed or agreed with some modifications to the map

Yes	Not Sure	No
°11	°10	°2

3. How supportive are you of the following elements in the Draft Master Plan:

Most participants were highly supportive or strongly supported the topics in this section

Draft Vision

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°2	°16	°5	°0	°0

Draft Outcomes

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°4	°16	°3	°0	°0

Hiking Experience Types

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°5	°14	°3	°1	°0

Unique Selling Proposition

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°8	°12	°3	°0	°0

Destination **Development** Recommendations

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°3	°12	°8	°0	°0

Destination **Management** Recommendations

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°3	°17	°3	°	°

Destination **Marketing** Recommendations

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°4	°14	°5	°	°

4. Overall, how supportive are you of the draft plan and the direction is sets for hiking tourism in the region?

Strongly Supportive	Supportive	Neutral	Unsupportive	Strongly Unsupportive
°4	°14	°4	°1	°0

5. Would you like to continue to keep in touch with the Hiking Tourism Master Plan as it progresses? (if so, please provide your name and email contact)

6. Are there other considerations that should be addressed or expanded upon in the final Hiking Tourism Master Plan?

