

# **First Impressions Community Assessment Cowichan Regional Report**

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## **General Overview**

Across the world, there has been a renewed focus on communities working together in order to create a balanced and mutually beneficial tourism ecosystem. In fact, the United Nations 2030 Agenda for Sustainable Development Goals highlights collaboration and partnerships as central tenets for resilient action. Research in the field of tourism has indicated that tourism collaboration can better leverage the strengths of diverse stakeholders, ultimately resulting in more profitable partnerships, sustained livelihoods, and better protection for cultures and the environment.

Although achieving coordination through integrated planning across government agencies, associations, and private enterprises can be difficult in any region, it is one of the most effective ways to resolve conflict and advance shared visions. Most importantly, collaborative decision making and coordination can act as an important leverage for change and empower diverse stakeholders to better govern the future of their communities.

Using a collaborative lens, the following report details how the communities in Cowichan can best work together to strengthen and develop their tourism assets and local economy.

## **Background**

The Cowichan region is located on Southern Vancouver Island, situated between Nanaimo to the north and the capital city of Victoria to the south, and is home to over 83,000 people. Cowichan is bordered by the Stuart Channel and Saanich Inlet on the East coast and the southern section of the famous West Coast Trail on the West coast. It also includes the Gulf Islands of Valdes, Thetis, and Penelakut. Located in Canada's only maritime Mediterranean climatic zone, Cowichan features the warmest year-round temperatures in the country.

Cowichan takes its name from "Quw'utsun," the name given to the valley by its original inhabitants, the Quw'utsun people. It is rooted in the Hul'q'umi'num word "shquw'utsun" which directly translated means "to warm one's back in the sun" and is why the valley has always been known as The Warm Land. Cowichan is located on the unceded traditional territories of the Coast Salish and Nuu-chah-nulth Peoples, including the Quw'utsun, Stz'uminus, Penelakut, Ditidaht, Malahat, Pacheedaht, Halalt, Lyackson, and the Ts'uubaa-asatx First Nations.

Famous for its agriculturally rich land and long growing season, Cowichan is home to hundreds of farmers, growers, and internationally acclaimed wineries. A vibrant artistic community has created a hub of galleries, performing arts theatres, and annual festivals throughout the valley. The region also boasts numerous outdoor recreation opportunities including hiking, biking, paddling, fishing, golfing, wildlife viewing, and more. Cowichan's artisanal food and beverage scene, rich arts and culture experiences, and year-round outdoor activities make it an attractive tourism destination.

## **Methodology**

During the months of July and August 2022, a member of the 4VI sustainable development team traveled to the four communities of Duncan, Lake Cowichan, Ladysmith, and Chemainus to perform a First Impressions Community Assessment of each area. In addition, the surveyor

performed an audit of online and print marketing materials, as well as qualitative interviews with stakeholders responsible for tourism development in each community. The survey information gathered during these field visits was used to provide suggestions toward tourism development opportunities in each community, as well as broader recommendations for regional tourism development in Cowichan. Listed in this document are the key findings of these surveys, a SWOT analysis, and recommendations for collaborative tourism development in the region.

The First Impressions Community Assessments required the surveyor to observe and evaluate different aspects of the community from the viewpoint of a first-time visitor. Areas of assessment were broadly grouped into the following sections: residential, services and facilities, public spaces, commercial, community engagement, accessibility, and tourism. Overall, the surveyor was left with a positive impression of Cowichan and many aspects of the communities exceeded expectations. Specifically, the quality of public spaces and recreational facilities, landscaping and beautification, walkability, unique retail opportunities, and friendliness of residents were particularly noteworthy.

Following the field visits and data collection, 4VI sustainable development members believe Cowichan has significant potential to further develop its tourism sector in the areas of cycling and mountain biking, trail development, event production and coordination, and sub-regional themes.

## **Key Survey Findings**

### **Section 1: Housing & Residential Areas**

#### **Score: Satisfactory**

The neighborhoods in each community were usually centrally located and close to community services. However, the quality of residential areas varied significantly. It was evident when driving through the neighborhoods that some residents took great pride in their homes, with particular consideration to landscaping, gardens, and property maintenance. Conversely, there was also some unmaintained housing which led to a decrease in overall curb appeal. Affordable and available housing and rentals remains a significant challenge for residents working in the tourism industry or other related sectors.

### **Section 2: Services & Facilities**

#### **Score: Excellent**

**2.1 Recreational Facilities** All of the communities surveyed in Cowichan featured a range of high-quality recreational facilities. These facilities provide indoor and outdoor recreation opportunities for both residents and visitors. Fitness centres, indoor arenas, sports fields, playgrounds, and gathering spaces were plentiful and helped to support the overall wellness of each community.

**2.2 Educational Services** A wide variety of elementary and secondary schools were available throughout Cowichan. Local schools appeared to be well-cared for and had ample outdoor spaces for students. Additionally, a central Vancouver Island University Cowichan Campus was recently built in 2011 and offers a variety of undergraduate programs.

**2.3 Health Services** The medical centres were easy to locate and had sufficient signage. In each of the communities surveyed, a variety of additional health services were available to residents.

### **Section 3: Public Spaces**

**Score: Excellent**

**3.1 Public Toilets** In certain areas of Cowichan, public restrooms were difficult to find or insufficient for the number of visitors. The upgrading and construction of new public restrooms should be prioritized due to their direct contribution towards community health and sanitation.

**3.2 Benches & Picnic Areas** There was ample public seating throughout each of the communities surveyed. In particular, downtown centres and recreational spaces had picnic tables and benches that were in great condition. Covered picnic shelters were available in most downtown parks.

**3.3 Garbage Bins** Garbage bins were plentiful and easy to find around each community. Dog waste bag dispensers were also widely available. During meetings with stakeholders, it was identified that garbage bins are often overflowing on event days which results in an increase of litter. The addition of composting and recycling bins would also help to divert waste from the landfill.

**3.4 Landscaping & Beautification** Parks and public spaces were well-cared for and frequently used by community members. Hanging flower baskets and gardens were prevalent throughout the downtown centres. In some communities, pedestrian walkways could be updated to improve overall walkability and beautification. This may include widening the sidewalks for better accessibility, adding more sidewalks, and installing outdoor art on main walking routes.

**3.5 Public Art** A key feature that distinguishes Cowichan from other regional destinations is the abundance of public art. Outdoor murals, sculptures, statues, and carvings were woven throughout the visitor experience in each community. In Duncan, the celebration of Indigenous culture and history through public art is an especially unique experience for visitors.

**3.6 Parking** There was adequate parking throughout the communities surveyed. This was especially evident in key locations such as the downtown cores and recreational spaces. This said, parking can become limited during the summer months which poses challenges for both visitors and residents. EV charging stations were present in each community.

**3.7 Signage** Generally, the location of directional signage allows visitors to easily find their way to and around each town. It is recommended that consistent branded signage for Cowichan be installed to create greater cohesion between each destination and bring more visibility to smaller communities located off the highway.

### **Section 4: Main Street & Central Business District**

**Score: Excellent**

The main streets of each town were well-organized, easily walkable, and had a strong visual appeal. There were a wide variety of retail stores, restaurants, and professional services in each

surveyed community. In most communities, the downtown centres were within walking distance of public green spaces, the waterfront, and residential neighborhoods. Visitors are left with an overall positive impression of strong economic health in Cowichan. For additional improvement, underutilized spaces in some of the downtown cores could be revitalized with the development of bike lanes and parklets that provide space for outdoor seating, business patios, and public art.

### **Section 5: Community Attitudes, Engagement, and Knowledge**

#### **Score: Excellent**

The surveyor noticed an exceptional level of customer service while exploring various local businesses. Employees were welcoming and knowledgeable about their community. Overall, the surveyor observed a high level of friendliness from residents including waves, smiles, and greetings. A strong feeling of community pride was evident throughout Cowichan. An educational campaign that brings awareness to experience recommendations across the region may be helpful in boosting tourism connectivity between communities.

### **Section 6: Accessibility**

#### **Score: Satisfactory**

The accessibility of facilities and services for people with disabilities was generally satisfactory. Most public washroom facilities, major attractions, and parks were able to accommodate individuals with physical disabilities. It was difficult to determine which accommodations, businesses, and trails were accessible by looking at online materials. One recommendation is to create a list of wheelchair accessible businesses and experiences. This could be featured on the Tourism Cowichan website and available in print at the visitor centres.

### **Section 7: Tourism**

#### **Score: Satisfactory**

**7.1 Restaurants** Cowichan has a wide variety of restaurants including international cuisine, cafes, bakeries, pubs, breweries, wineries, and distilleries. The surveyor was impressed with the high quality and quantity of culinary experiences available. Food trucks and carts adjacent to the downtown core and parks may help alleviate wait times during the peak season.

**7.2 Stores** The downtown areas in each of the communities surveyed featured a wide variety of high-quality boutiques, shops, and artisan galleries. The visitor centres typically sold souvenirs such as books, postcards, and locally made products. Offering branded Cowichan products may help to increase the destination's visibility on Vancouver Island.

**7.3 Accommodation** There were a variety of well-maintained accommodation options in each of the communities surveyed including hotels, motels, B&B's, cabins, lodges, vacation rentals, retreat centres, and campgrounds. In some communities, there was a lack of accommodation options within walking distance to the downtown core. During engagement sessions with stakeholders, an overall accommodation shortage in Cowichan was identified as one of the largest barriers to tourism development within the region.

**7.4 Tour Operators** Overall, there were a limited number of tour operators in the four communities surveyed. Attracting more tourism operators would likely increase the number of overnight visitors and tourism dollars flowing into the community. Self-guided tours are a great way to help gauge the popularity of an activity or theme before entrepreneurs invest in the concept.

**7.5 Tourist Attractions** There were an abundance of tourism attractions throughout Cowichan. These attractions are mostly oriented around arts and culture, agritourism, and outdoor recreation. The wide variety of activities allow groups with diverse interests, such as families, to each enjoy the destination. Creating more opportunities for off-season travel will help increase the number of annual visitors to the region and lengthen the tourism season. This also offers incentive for local businesses to add services and extend operating hours.

**7.6 Availability and Quality of Information** The visitor centres featured ample maps, visitor guides, and brochures for each town and nearby communities. Additional information was also frequently available through information kiosks or signage located in a central location. In some of the communities surveyed, online trip-planning resources were limited. For this reason, visitors may rely primarily on the Tourism Cowichan website and social media platforms for information.

## SWOT Analysis

The following SWOT analysis was created from the information gathered during the First Impressions Community Assessments. The purpose of this analysis is to summarize and visually organize the strengths, weaknesses, opportunities, and threats Cowichan has for destination planning and strategy.

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>● Strong cultural heritage</li> <li>● Walkability in each community</li> <li>● Downtown vibrancy</li> <li>● Family friendly activities</li> <li>● Excellent public spaces and recreational facilities</li> <li>● Access to outdoor recreation</li> <li>● Well-maintained parks and trails</li> <li>● Waterfront access</li> <li>● Annual festivals and events</li> <li>● Abundance of public art and artisans</li> <li>● Variety of dining, accommodation, and shopping options</li> <li>● Friendliness of residents</li> <li>● Knowledgeable visitor centres</li> <li>● Strong community pride</li> <li>● Agritourism experiences</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>● Short length of stay</li> <li>● Limited guided tour operators</li> <li>● Lack of seasonal dispersion</li> <li>● Limited operating months of key tourism attractions</li> <li>● Minimal monetized winter tourism products</li> <li>● Lack of shared information between communities</li> <li>● Lack of consistent signage</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>● Unique brand storytelling</li> <li>● Develop year-round visitation</li> <li>● Increased travel trends to rural communities</li> <li>● Attracting new tourism operators</li> <li>● Accommodation development</li> <li>● Expansion of active transportation infrastructure</li> <li>● Increase in people moving to the region</li> <li>● Partnerships with nearby communities</li> <li>● Centralized location for day trips between communities</li> <li>● Access to major transportation centers</li> <li>● Day trips from Nanaimo and Victoria</li> <li>● Growing culinary scene</li> <li>● Indigenous partnerships</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>● Housing and rental shortage</li> <li>● Labour shortage</li> <li>● Accommodation shortage</li> <li>● Lack of island wide public transportation</li> <li>● Largely seasonal destination</li> <li>● Competition from other destinations on Vancouver Island</li> <li>● Natural disasters</li> </ul>

## Tourism Development Recommendations

The following tourism development recommendations were created based on the First Impressions Community Assessments, online audits, and engagement sessions held with local stakeholders in Cowichan.

### **1) Regional Cycling Strategy**

During engagement sessions, economic development stakeholders in Cowichan reported that there is growing interest among tourism operators and visitors for the development of cycling and mountain biking in the region. Furthermore, the Cowichan Valley Trail, an integral part of the Trans Canada Trail route, was identified as a key attraction for visitors coming to the region. At this time, there is a lack of public information available to help guide the development process across different communities. For this reason, it is recommended that Tourism Cowichan produces a regional cycling strategy that would act as a centralized document containing visitor data, a gap analysis, infrastructure development plan, and a strategy for monetization of local cycling trails. The components of this report are discussed in greater detail below.

#### Data Collection

Economic development stakeholders and local operators would benefit from data collection and reporting that can be used to support grant applications. In particular, data that illustrates the linkages between the Cowichan Valley Trail, tourism, and economic recovery would be useful. Resources that reference the growth of cycling tourism, the increase in bicycle shops and tour companies, the development of supplementary tourism sectors related to cycling, and data demonstrating job growth could be used for this purpose. Other useful data may include the number of visitors to different trails, their origin destination, the number of nights visiting, and the most common cycling routes.

#### Gap Analysis & Infrastructure Development

At this time, there is a considerable deficit in the amount of cycling infrastructure among Cowichan's main trails, including the Cowichan Valley Trail. An increase in overnight parking lots, signage, washrooms, bicycle wash stations, bicycle lock stations, water stations, electrical outlets, and camping facilities is needed in order to create an elevated experience for visitors. A gap analysis of this infrastructure, existing accommodation, and transportation options between trails will need to be conducted in order to create a cycling infrastructure development plan.

#### Monetization Strategy

Stakeholders reported that there is little revenue created for local communities through existing cycling tourism. This is due to a lack of connectivity between cycling trails and local businesses. Monetization opportunities could focus on developing cycling specific events, increasing local overnight visitation, and communication guides for the purchasing of supplementary goods, services, and experiences. The development of connector trails to the central business districts and sponsored signage will also be important for linking trail users to local businesses. This would

allow for a balanced approach to cycling tourism which both increases the value of visitation to local communities and provides necessary resources for ongoing trail maintenance.

### Trail Maintenance

Finding funding for trail maintenance remains an obstacle for many communities on Vancouver Island. It is suggested that the Cowichan Valley Regional District could utilize the Job Creations Partnership through WorkBC to hire workers for trail repairs and maintenance. Greater collaboration with organizations that currently maintain local trails, such as The Cowichan Trail Stewardship Society, would further efforts already underway.

## **2) Coordinated Event Production**

Cowichan hosts a large variety of events and festivals throughout the year. However, there is little coordination in the development and implementation of events between stakeholders. An improved event tool that is user friendly on the Tourism Cowichan website would increase engagement and encourage stakeholders to post their events. A function that would allow visitors to view events by different categories such as family, arts and culture, as well as food and beverage would help streamline the user experience.

For event organizers, a centralized database that contains funding opportunities, equipment rentals, and potential partners would help to facilitate collaborative development. This could be best coordinated through the Cowichan Valley Regional District, as many of these program elements already exist within their organization. Increasing the communication between businesses can strengthen the economic benefit and overall revenue of each event and festival. Dispersing major events into the fall and winter seasons will also help to prevent overlapping and lengthen the tourism season.

## **3) Sub-Regional Themes and Messaging**

Cowichan is a large and diverse region, both geographically and culturally. In order to better highlight the diversity of experiences offered throughout Cowichan and increase visitor awareness of smaller communities, it is recommended Tourism Cowichan designs sub-regional themes and messaging to be incorporated into their marketing strategy. Communities could be grouped together by their unique characteristics and geographical features. For example, geographical themes could include coastal, lakeside, countryside, islands, and mountains.

Under these sub-regional themes, economic development stakeholders can link tourism attractions and communities through the creation of routes. A map that provides the intended route and an itinerary of activities along the way could be developed for visitors traveling via car and/or bicycle. Key messaging and storytelling that appeals to the emotions of visitors and sets the tone for the experience should be developed to accompany each sub-regional theme.

#### **4) Public Washrooms**

During the field visits, the surveyors noted a lack of public washroom facilities throughout communities in Cowichan. This poses an ongoing challenge for seniors and families, who comprise a large portion of visitors to the region. Adequate public washroom facilities are considered a basic need for both visitors and residents, especially during events, festivals, and the peak tourism season. Adequate and well-maintained public restrooms are an important piece of the overall visitor experience, especially in downtown areas.