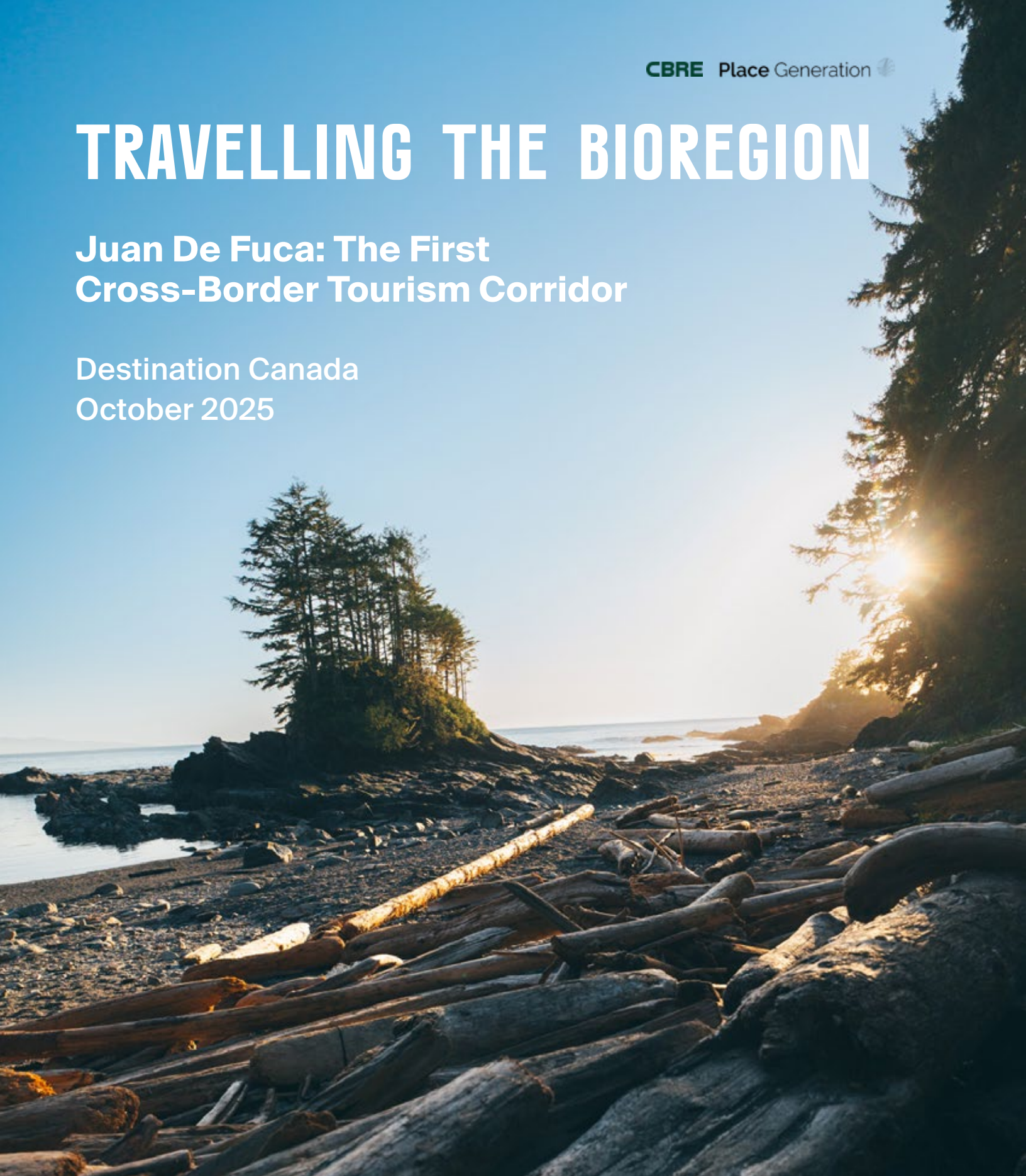


TRAVELLING THE BIOREGION

Juan De Fuca: The First Cross-Border Tourism Corridor

Destination Canada
October 2025



ACKNOWLEDGEMENTS

Travelling the bioregion—Juan de Fuca: The First Cross-Border Tourism Corridor is the culmination of a collaborative strategic process encompassing research and analysis, engagement, and the development of strategic pillars to inform and guide investment opportunities. This report has been co-created by CBRE Development Strategy & Consulting’s Destination & Tourism team (“CBRE”), in association with Place Generation (“PG”)—the CBRE-PG Team—with partners, Rights Holders and interest holders across BC and Washington State.

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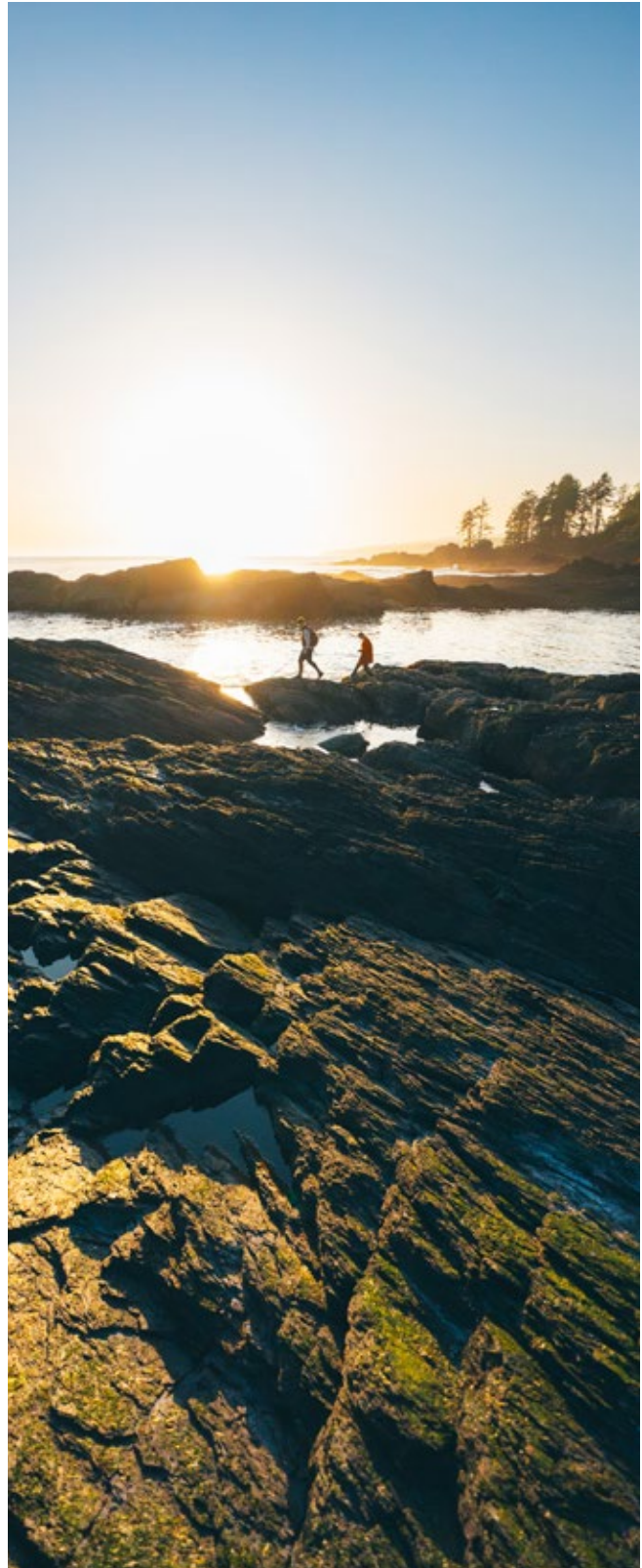
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Botanical Beach, Juan de Fuca Provincial Park



Sooke Point Ocean Cottages Resort

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BUILDING A TOURISM CORRIDOR

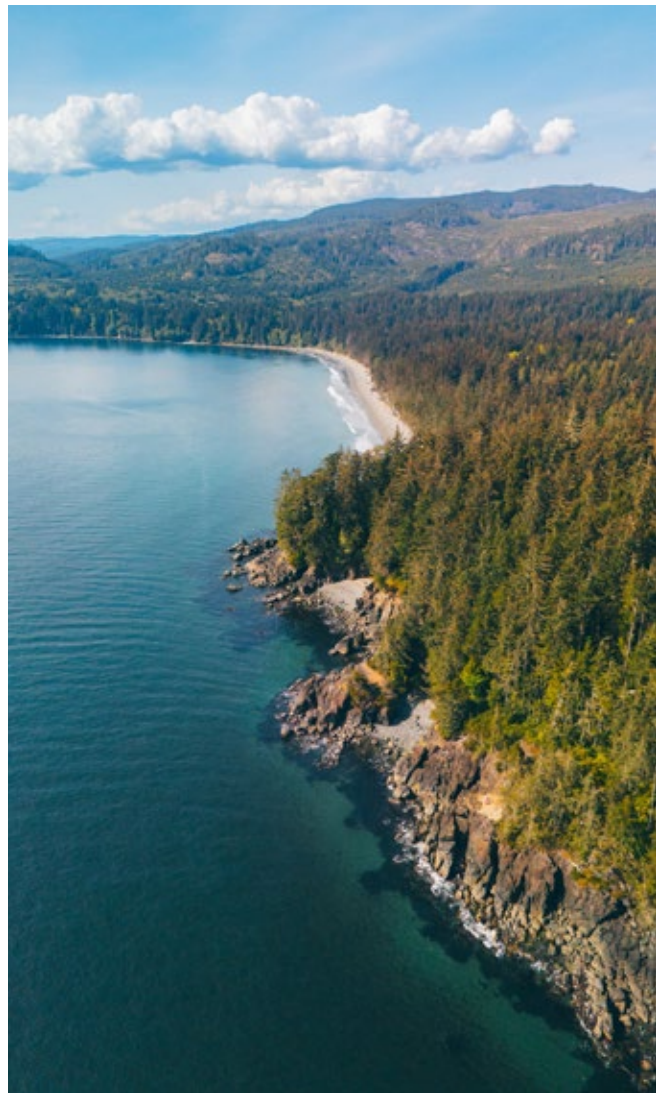
Purpose and scope: why this corridor, why now?

Destination Canada retained CBRE Destination Strategy & Consulting, in association with Place Generation (the CBRE-PG Team), to produce a corridor report—strategy, investment plan, and implementation roadmap—accelerating destination development in the Juan de Fuca Corridor. The work was co-created with Destination Canada’s Destination Development team and partner leads, the District of Sooke (BC) and the Pacific Northwest Economic Region (PNWER), whose mandate is to grow regional prosperity while protecting the natural environment across 5 U.S. states, 3 Canadian provinces, and 2 territories.

The purpose is clear: enhance economic, social, and cultural development through tourism without compromising the corridor’s natural assets and profound cultural heritage. As part of Destination Canada’s [Tourism Corridor Strategy Program](#), implementation of this strategy will connect assets, experiences, and communities, encouraging operators to collaborate, disperse visitation, and knit together physical, ecological, and cultural links. The approach is grounded in **regenerative tourism**—a community-first form of stewardship that integrates social, ecological, cultural, and economic well-being.

The Juan de Fuca Corridor is uniquely cross-border: the Strait spans BC’s Highway 14 and Washington’s Highway 112 and includes six First Nations and nine Tribes. While both shores share one biosphere, communities and tourism governance remain distinct and fragmented.

As the Juan de Fuca Corridor is the first corridor to cross into the United States, it offers new opportunities to engage with Canada’s largest international market. This corridor builds upon existing strategies while identifying investment opportunities for future attraction. There is an important need for this investment to continue to engage US travellers. In 2025, 16.2 million travellers from the US were expected to visit Canada and spend \$13.7 billion, according to Destination Canada’s 2024 USA Market Highlights. Maintaining and strengthening the existing partnerships and connections that went into the creation



French Beach

of the Juan de Fuca Tourism Corridor study is a spotlight on the efficacy of tourism as a means for rebuilding relationships, particularly considering the current political environment.

Beyond strategy, this report sets up the means to act: an Investment Plan leveraging diverse funding sources, a governance structure and ongoing Steering Committee, and a phased Implementation Plan. At its core are the values of collaboration and bioregional stewardship—advancing reconciliation, strengthening Indigenous–non-Indigenous partnerships, and defining investable opportunities that support long-term, sustainable growth.



Sooke

A place bigger than borders: why a bioregion?

Travelling the bioregion is more than just a catchy title, it is the beating heart of the strategic vision for the Juan de Fuca Tourism Corridor. This is the first cross-border tourism corridor of its kind, and instead of starting with what separates us on either side of the border (different legal systems, business cultures, and regulations, etc.), the strategy focuses on what unites us: the living, breathing identity of the Strait of Juan de Fuca. Here, the landscape itself is the bridge, woven together by forests, tides, and traditions that know no passport control.

A shared sense of place

In every workshop and conversation, one truth kept rising to the surface: on both shores, people share a deep respect for the land and waters that sustain them. From generation-old fishing traditions to modern stewardship projects, there is a common heartbeat. Many Indigenous families hold ties that cross the international border entirely, providing a reminder that these connections are older, deeper, and far more enduring than any political line.

The ecological powerhouse

The Strait is not just a scenic backdrop—it is a globally significant ecosystem. Its kelp forests, salmon runs, orcas, otters, sea birds, and tidepools form a living network that sustains both nature and people. As part of the greater Salish Sea Bioregion, the Juan de Fuca Corridor region sits between two major urban gateways—Victoria, BC and

Seattle, WA—providing access to visitors and investment, while remaining located in a more isolated region with smaller population centres, thereby acting as a natural hub for tourism, conservation, and education.

A network for action

A bioregional network model provides a governance system that mirrors the interconnectedness of the place itself. The cross-border Steering Committee gives every voice—from Indigenous nations to small businesses and conservation groups—a seat at the table. By uniting priorities, implementing this strategy can open doors to major funding streams: climate adaptation grants, international conservation finance, reconciliation initiatives, and cross-border resilience programs.

A commitment

Choosing the bioregion concept means taking shared responsibility for the health, cultural vitality, and economic resilience of this extraordinary place. It means thinking beyond “us and them,” and working as one to ensure that every investment—whether in tourism, infrastructure, or stewardship—benefits the whole.

In short, the concept of “bioregion” is a true reflection of a shared ecology, history, and future. Travelling the bioregion is not just a strategy—it is a promise to act together as caretakers of a place that is bigger than borders.

Juan de Fuca: the living gateway to the Salish Sea



Botanical Beach, Juan de Fuca Provincial Park

The Juan de Fuca region, linking British Columbia and Washington State, is a globally significant ecological zone (bioregion)—and a rising focal point for regenerative tourism, conservation, and Indigenous-led stewardship. This is the portal where the Pacific feeds the Salish Sea, carrying fresh, life-rich ocean water and powering kelp forests, salmon runs, orcas, otters, seabirds, and teeming tidepools. Visitors come for the marine life and stay for the story: whale watching and paddling, but also seaweed-based wellness, working waterfronts, and crab-festival culture that ties ocean to table.

What makes it a bioregion is clear in three (3) dimensions.

1. **Hard boundaries:** subduction zones and fault lines shape the geology; the Olympic Mountains and Vancouver Island Ranges frame the horizon; rivers like the Elwha, San Juan, and Jordan run from mountain to sea; and a rain-drenched west contrasts sharply with a drier east.
2. **Soft boundaries:** ecosystems knit rainforest valleys to kelp forests and tidepools; riparian corridors bridge fresh and salt water; and Juan de Fuca's marine basins move differently than the rest of the Salish Sea.
3. **Human boundaries:** deep Indigenous relationships and stewardship—clam gardens, salmon ceremonies, cedar harvesting—combine with contemporary cross-border action, from the Elwha dam removal to Fairy Creek activism.

This corridor is the critical gateway between the Pacific and the Salish Sea. It spans multiple watersheds and First Nations communities, sits atop distinct bathymetry and ocean circulation patterns, and delivers roughly 95% of the Salish Sea's incoming ocean water—with geology and ecology unlike the Strait of Georgia or Puget Sound. Though named after a European explorer, its reality is anchored in Indigenous knowledge, ecological uniqueness, and modern efforts to restore balance.

Strategically, aligning the Juan de Fuca Corridor with the Salish Sea Bioregion, which was formally recognized in 2019, and with its major gateways: Seattle, Vancouver, and Victoria, reflects how visitors actively move through this place. Hence the title of this strategy: **Travelling the Bioregion**—one connected coastline, many communities, and a shared commitment to leave the place stronger for future generations.

SPOTLIGHT ON THE DESTINATION

Corridor location

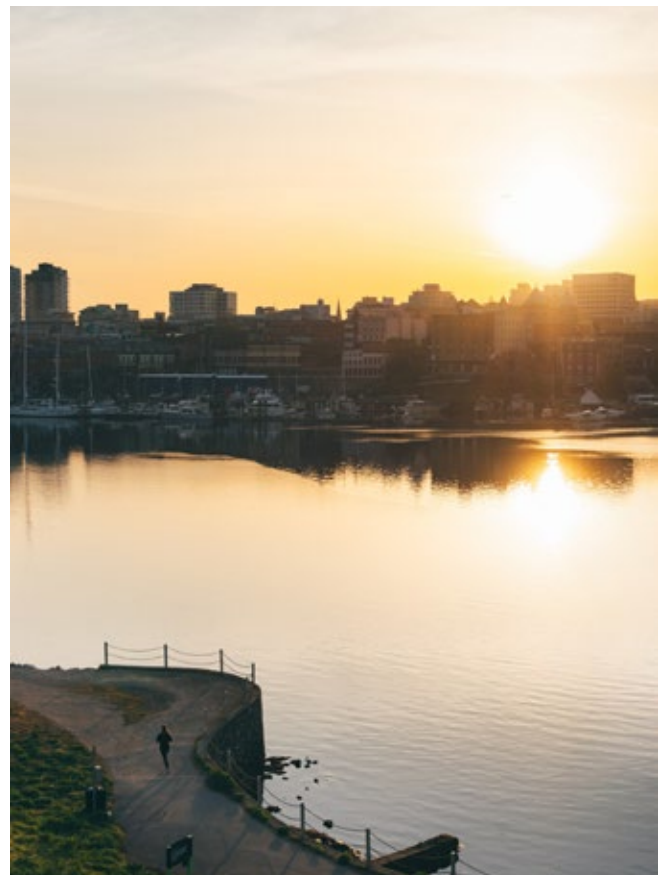


Source: <https://www.google.com/maps/>

Victoria Harbour

The Juan de Fuca Tourism Corridor encompasses a range of coastal communities interconnecting Indigenous and non- Indigenous peoples. These places range from small cities and towns of Port Angeles and Sequim in Washington State, and Sooke, Metchosin and Port Renfrew in BC, to traditional lands and community hubs of the Pacheedaht, T'Sou-ke, and Sci'anew (Beecher Bay) First Nations, as well as the Makah, Lower Elwha S'Klallam and Jamestown S'Klallam Tribes. Although distinct in their cultural traditions and economies, these places are linked physically by two main highways (Highway 14 in BC and Highway 112 in Washington State), and environmentally, being part of a shared bioregion.

The map above provides a visual representation of the Juan de Fuca Bioregion, with common names of towns and cities within the corridor. Although not physically linked by land, the Black Ball Ferry provides an important link between Victoria, BC and Port Angeles, WA—both gateways to the corridor.





Map shows the interrelation between communities on both sides of the Juan de Fuca Strait when the borders are removed –exemplified by the First Nations and tribe communities and language families. Source: <https://maps.fpcc.ca/>

Tourism in the Juan de Fuca Corridor

The Juan de Fuca Tourism Corridor is part of a larger Pacific Northwest area of North America, and the traditional territory of the Coast Salish and Nuu-Chah-Nulth First Nations. This island and coastal region comprise a rich geography with mountains, beaches, old growth forests and rainforests, rivers, fjords and archipelagos, along with fertile agricultural lands. The combination of freshwater and saltwater from surrounding watersheds and the Pacific Ocean, make the Juan de Fuca Strait a particularly unique ecological body of water, supporting migrating salmon, humpback whales and other marine life. Along with beaches, the rocky coast lands offer enough protected coves to support activities like surfing, kayaking, whale-watching, fishing, wildlife viewing and beachcombing on both sides of the Strait. Forests and more inland parts of the environment have also been softly developed as trails for people since Indigenous communities started using them, as well as parks and other natural attractions (e.g., the Sooke Potholes), on these lands. These “blue and green spaces”, as identified in the *Juan de Fuca Corridor—Community First*,

*Regenerative Tourism Plan*¹ are important to the residents of the corridor and also drive visitation to the area.

Most people travel through the city of Greater Victoria to reach the Town of Sooke at the entrance to the Juan de Fuca area in BC, which is within a 40 km drive. Victoria is both a popular tourism destination on Vancouver Island and the Capital City of British Columbia. In Washington, most visitors access the Juan de Fuca Corridor through the City of Seattle, traveling the 110 kms along Highways 101 and 104, to Sequim and Port Angeles to enter the corridor in Washington state. These destinations feature cross-border connections by ferry and air, however, there is no land connection to Vancouver Island in BC. The corridor entrance and hub destinations (Sooke, Port Angeles and Sequim) have the highest populations and concentration of tourism infrastructure, including accommodations, restaurants, transportation connections, recreational areas, and visitor services.

¹ Juan de Fuca Corridor – Community First, Regenerative Tourism Plan, September 2024, p. 16

The following table provides a summary of tourism assets and experiences throughout the corridor.

Tourism assets in Juan de Fuca Tourism Corridor (BC and WA)

TOURISM ASSET TYPE	BC	WA	TOTAL	% OF TOTAL
Culinary	51	163	214	39%
Accommodation	36	65	101	18%
Retail	13	41	54	10%
Sports and recreation	27	14	41	7%
Nature and outdoors	21	12	33	6%
Travel and transportation	7	24	31	6%
Agritourism	2	25	27	5%
Arts, culture, and heritage	10	12	22	4%
Event venue	4	4	8	1%
Spa and wellness	4	4	8	1%
Attraction	4	3	7	1%
Indigenous tourism	2	4	6	1%
Grand total	181	371	552	100%

Source: CBRE

NOTE: accommodations include traditional hotels, resorts, inns and B&Bs. Short-term accommodations have been excluded from the inventory due to the monthly fluctuations in active inventory.

Across the corridor, the largest proportion of tourism assets by far are **culinary** (220 assets or 39% of total assets), of which the majority (148) are either limited or full services restaurants. It should be noted that Clallam County, WA, has a larger share of branded or chain restaurants. **Accommodations** (excluding short-term accommodations) is the next most prevalent, making up 18% of tourism assets combined. The north shore of Washington State has a larger number of traditional hotel and motel accommodations, many of which are branded (as with the restaurants), while BC has a larger variety of property types—including B&Bs, inns, resorts, RV parks and vacation rentals.

From a market-ready perspective, the most notable assets within the Juan de Fuca Tourism Corridor are **nature and outdoor** experiences. Although categorically, these only represent 7% of physical assets (e.g., specific beaches, trailheads, tidal pools, and lookouts), they also include the surrounding landscape and the Strait itself. Many visitors come to see the Sooke Potholes, Avatar Grove or Cape Flattery, hike or cycle the many trails (Olympic Discovery

Trail, Juan de Fuca Trail, Galloping Goose Trail, West Coast Trail), or surf and dive from various beach areas along the coast of the Strait. These assets are market-ready as they are; however, they could benefit from investment to ensure they are maintained and protected where necessary. Investment into these assets could result in a higher economic impact and returns to capitalize on non-revenue producing natural assets, and could assist in enhancing conservation efforts.

Other notable assets in the corridor either **build off either the land**, such as the Sequim Lavender Festival and Sooke Night Market—**or the water**, including the Black Ball Ferry Line, Dungeness Crab Festival and whale-watching tours. As important are assets and experience highlighting local arts, culture and heritage, such as the Makah Cultural & Research Center Museum, Sooke Region Museum & Visitor Centre, the Field Arts & Events Hall, and the T'Sou-ke Community Hall + Health Centre, which when open, is expected to provide a “place of connectivity for the Nations and visitors.”

Prestige Oceanfront Resort, Sooke



Visitor market behaviours



Stoked Pizzeria, Shirley BC

Currently, the primary sources of visitation to the corridor are the two domestic markets: Canada and the United States. These two countries not only share the Strait geographically but are connected through trade, culture, family ties, and historical stewardship of this bioregion. Domestic visitors tend to have higher familiarity, easier access, and lower barriers to entry, which supports faster, more resilient early-stage tourism growth. As a means of determining how best to develop the Juan de Fuca Tourism Corridor and enhance its attractiveness to visitors who share its cultural, ecological, and community

commitments, it is helpful to consider common travel behaviours and psychographics.

Destination Canada has invested considerably into a new tool, called the **Traveller Segmentation Program**², which was created to categorize typical visitor behaviours and preferences for more targeted destination management strategies with “highly engaged guests.” Three profiles were identified during the study process that seemed most relevant for the existing experiences offered in the Juan de Fuca Tourism Corridor. These are: **Outdoor Explorers**, **Culture seekers**, and **Purpose driven families**. Each of these segments display a natural affinity for the corridor’s landscapes, stories, and values:

- **Outdoor Explorers** (12% of Canadians, 13% of Americans) are active, authenticity-driven travelers from provinces and states such as Ontario, Quebec, BC, Alberta, California, Texas, New York, and Florida. They seek short, adventurous trips filled with hiking, wildlife viewing, and kayaking, paired with cultural depth—exactly what the corridor offers through its trails, marine adventures, old-growth forests, waterfalls, and Indigenous storytelling. Here, they find a wild, interconnected ecosystem that transcends political borders and satisfies their desire for both physical activity and personal growth.
- **Culture Seekers** (12% of Canadians, 11% of Americans) value diversity, inclusion, sustainability, and authentic connection. Coming from similar markets as Explorers, they travel to relax, learn, and immerse themselves in local culture. In the corridor, they can engage with Indigenous-led tourism, heritage sites, culinary experiences, local arts, and community narratives that reflect both history and living traditions. These experiences deliver the authenticity and cultural exchange they prize.
- **Purpose Driven Families** (4% of Canadians, 5% of Americans) prioritize bonding, shared memories, and destinations that reflect their values. While the corridor requires more logistical planning for families, those who come for ecological learning, cultural immersion, or active exploration will find the rewards profound. From family-friendly nature trails and water-based adventures to cultural workshops, the region offers meaningful experiences that inspire loyalty and thoughtful spending.

¹ <https://www.tourismdatacollective.ca/segmentation>

Total available market for tourism in the Juan de Fuca Corridor

To best understand the potential for growth in the Juan de Fuca Tourism Corridor, visitation estimates were prepared for the Juan de Fuca Tourism Corridor as of year-end 2024 and projected out to 2029.

As shown, the **resident markets** include both the population of communities in the Juan de Fuca Corridor itself and from the city of Greater Victoria. **Tourist markets** are comprised of person visits to Greater Victoria, as the main hub for visitors to the Juan de Fuca Corridor in BC, whether arriving by air, ferry and/or road. (NOTE: a **person visit** represents an individual visitor's entire stay in a destination, whether for one or multiple days).

Based on CBRE research, Statistics Canada Travel Survey of Canada data, the Conference Board of Canada's Travel Market Outlooks for Spring 2025, Environics Analytics, Black Ball Ferry Lines and Washington State Tourism, the total available market for tourism experiences in the Juan de Fuca Tourism Corridor in BC included 5.4 million person visits in 2024 and is projected to increase to 6.1 million person visits by 2029 (up 11%). In 2024, there were approximately 40 million visitors to Seattle, which is projected to increase to 44.2 million by 2029. This, inclusive of communities on both sides of the border and visitor markets to Greater Victoria, Clallam County, and an estimated 1% of visitation to Seattle, WA, equates to an estimated **8.1 million potential visitors by 2029**.

Total available markets for the entire Juan de Fuca Tourism Corridor (2024 + 2029P)

RESIDENT MARKETS	2024	2029P	% GROWTH
Juan de Fuca communities - BC	28,900	32,500	12%
Juan de Fuca communities - Washington	67,200	68,700	2%
Greater Victoria, BC	443,700	483,900	9%
Subtotal resident markets	539,800	585,100	8%
TOTAL VISITOR MARKETS	2024	2029 EST	
Greater Victoria BC	4,970,500	5,551,300	12%
Clallam County, WA	1,372,300	1,515,000	10%
Seattle, WA (est 1%)		442,000	-
Subtotal - visitor markets	6,342,800	7,500,300	18%
TOTAL	6,882,600	8,093,400	18%

Sources: Environics Analytics, Destination Greater Victoria, Washington State Tourism, Conference Board of Canada, CBRE estimates

Visitor market behaviours for Juan de Fuca Tourism Corridor experiences

When applying Destination Canada's traveller segments, **Outdoor Explorers** in particular represent significant potential for future visitation to the Juan de Fuca Corridor. This segment represents approximately **12% of Canadian travellers and 13% of Americans**, based on Destination Canada research.

With an estimated 8.1 million visitors estimated to encompass the total available market for visitation to

the Juan de Fuca Corridor by 2029, Destination Canada statistics suggest that **an estimated 1.0 million visitors would be potentially interested in experiences offered within the Tourism Corridor.**

Other core international Outdoor Explorer markets to consider for future marketing include Australia (13% of the population), China (23%), Germany (14%), France (13%), Japan (7%), Mexico (15%).

Hurricane Ridge



TOURISM CORRIDOR STRATEGY

Introduction

The CBRE-PG Team respectfully acknowledges that a lot of excellent research and planning has already been conducted on the subject of regenerative tourism and growth in the tourism sector within parts of the Juan de Fuca Corridor.

The vision, values and goals are the fundamentals of the Juan de Fuca Tourism Corridor strategy. They incorporate findings from these foundational documents and provide the best way forward to develop a regenerative tourism destination for the benefit of all those who live in the corridor.

Vision

The Juan de Fuca Tourism Corridor will be a flourishing place, connected by sustainable tourism experiences that deliver shared benefits to all that live within it.

Lake Crescent in autumn © Marsha Massey



Goals

- 1. Improve cross-border connections**
Strengthen physical, cultural, and technological links between Canada and the U.S. to position the corridor as a unified destination. Collaboration across the Strait will honor the shared bioregion and build economic, ecological, and community resilience.
- 2. Enhance transportation and cultural links**
Develop sustainable transport options—ferries, multimodal trails, zero-emission transit—and deepen cultural exchange between Indigenous and non-Indigenous communities, so visitors experience the region as one interconnected whole.
- 3. Increase corridor awareness**
Promote the corridor’s natural beauty, Indigenous heritage, and community spirit to attract like-minded travelers who seek meaningful, respectful experiences.
- 4. Empower tourism ecosystems**
Support local businesses, Indigenous operators, artists, guides, and conservation groups through capacity-building and inclusive leadership opportunities, creating an adaptive and regenerative tourism economy.
- 5. Celebrating local community values**
Ensure tourism reflects resident priorities—stewardship, authenticity, and pride of place—so growth strengthens rather than erodes community character.
- 6. Secure sustainable funding**
Pursue diverse and innovative funding sources to support infrastructure, programs, and partnerships, ensuring long-term development without compromising regenerative principles.
- 7. Strengthen partner collaboration foster**
Trust, shared leadership, and joint decision-making among communities, Tribes, businesses, and sectors, building a true “community of communities.”
- 8. Enhance return on investment**
Aim for both financial and social returns, measuring success by cultural vibrancy, environmental health, and community wellbeing as well as economic growth.

Core values

Regeneration: revitalizing communities and environment

Regeneration extends beyond preservation, actively restoring and enriching the natural, cultural, and social systems of the Juan de Fuca Strait. This living system demands stewardship, creativity, and a shift from consumption to contribution. Projects, partnerships, and visitor experiences should enhance the Strait, strengthening its waters, lands, species, cultures, and stories for a resilient future. Recognizing climate risks associated with development and integrating future assessments will be essential for the successful strategic implementation of the Juan de Fuca Tourism Corridor.

Reconciliation: connecting Canadian, American, and Indigenous communities

Reconciliation must be central, not symbolic. Guided by Indigenous knowledge, governance, and traditions, tourism initiatives must actively support Indigenous-led experiences, respect sacred sites, and ensure economic benefits reach Indigenous communities. True reconciliation heals historic divisions and fosters shared stewardship across the bioregion.

Care for the bioregion

The Strait is a connected system of watersheds, forests, shorelines, and communities that transcend political borders. A bioregional perspective means acting as participants within this system, ensuring tourism, education, and development align with its natural rhythms and needs.

Respect for residents

Local people are stewards and cultural keepers, not just stakeholders. Successful initiatives must be shaped with communities, enhancing quality of life and pacing growth to protect identity and social fabric. Trust and participation are essential for regeneration.

Accessibility and inclusion

A regenerative destination must be accessible and inclusive from the start. Infrastructure, transportation, accommodations, and trails should welcome people of all abilities. Social inclusion ensures all visitors, regardless of background, feel safe, respected, and valued—expanding the corridor's reach while upholding justice, dignity, and community wellbeing.

Strategic pillars: what we will build together

Access and sustainable mobility

Enhancing sustainable access is key to the corridor's success. Multi-modal, low-emission options—e-bike networks, ferry linkages, and water shuttles—will connect communities, reduce environmental impact, and encourage slower, more conscious travel. Mobility becomes part of the visitor experience, supporting equity, livelihoods, and stewardship.

Indigenous land and traditions

The Strait is the ancestral territory of Indigenous Peoples who have stewarded it for millennia. Indigenous leadership and storytelling will be central, and the T'Sou-ke, Pacheedaht, Beecher Bay, Lower Elwha S'Klallam, Jamestown S'Klallam and Makah Nations must be engaged as core partners. Cultural heritage mapping, Indigenous-led experiences, and knowledge-sharing will ground tourism in respect, reconciliation, and place-based wisdom.

Arts, culture and heritage

Culture transforms landscapes into storied homelands. Festivals, exhibitions, and artist exchanges will strengthen cross-border connections, animate public spaces, and preserve heritage. Investing in venues and storytelling platforms will ensure the region's cultural expressions remain vibrant, dynamic, and accessible.

Eco & edu-tourism

The corridor's landscapes invite tourism that inspires awe and responsibility. Shipwreck diving, winter surfing, and mushroom foraging can be paired with conservation education, citizen science, and Indigenous knowledge to turn visitors into active stewards of the region's lands and waters.

Wayfinding

Wayfinding will guide visitors through landscapes and stories, not just to destinations. Integrated physical and digital systems will connect Indigenous territories, protected habitats, village centres, and hidden beaches, encouraging respectful exploration and deeper engagement with the bioregion.

Pillar objectives: from vision to actions

Access and sustainable mobility

- Expand multimodal, zero-emission transport.
- Improve infrastructure and accessibility.
- Invest in connections and amenities to enhance visitor access to Juan de Fuca's natural and cultural highlights.
- Create access to underutilized natural areas ready for visitors.

Indigenous land and traditions

- Collaborate with local and Indigenous communities to ensure authentic experiences.
- Enhance tourism quality through respect for nature and culture.
- Promote guided cultural and nature tours, including hikes, traditional canoe paddling, storytelling, old-growth forest walks.
- Enrich existing experiences with Indigenous cultural interpretation, language, and history.
- Combine wellness activities (e.g., yoga, forest walks) with cultural teachings and traditions.
- Promote participation in Indigenous salmon feasts, traditional food tastings, and culinary storytelling.
- Invest in totem poles and Indigenous art in public spaces and museums.
- Develop and co-create workshops where visitors can participate in carving, weaving, or painting led by Indigenous artists.
- Participate in community events like the Dungeness Crab Festival, featuring tribal welcoming ceremonies, storytelling, and showcases of Indigenous seafood traditions.

Arts, culture and heritage

- Spark curiosity on both sides about each other's rich cultural offerings—from the Sequim Community Orchestra to the Sooke Philharmonic, and from the Makah Cultural and Research Center to the Sooke Region Museum.

Eco and edu-tourism

- Encourage the development of new hiking trails, excursions, and outdoor activities.
- Increase organized tours for spotting orcas, humpback whales, gray whales, and other marine life in the Juan de Fuca Strait.
- Expand wildlife tours and provide more opportunities to explore the coastline and rainforest by water.
- Offer visitors more options for active exploration of the corridor.

Visitor services

- Enable tourists to be able to plan their trips more easily.
- Encourage people to discover lesser known yet unique places in the region.
- Improve information resources.
- Create easy access to Cross-Border Routes thanks to partnerships with American counterparts.
- Integrate signage and storytelling on both sides
- Provide a coherent physical and digital wayfinding.
- Highlight accessible trails, cycling routes, and sensitive areas to avoid, supporting both navigation and stewardship.

Shirley Delicious, Shirley BC



Potential key performance indicators

	KEY PERFORMANCE INDICATOR	METRIC
SOCIAL	Indigenous community engagement	% change year over year in the # of meetings, agreements, formal partnerships and co-developed tourism initiatives with Indigenous Nations and Tribes.
	Resident sentiment toward tourism	% change year over year in # of residents reporting positive perceptions and negative perceptions of tourism's impact (resident survey score).
	Community wellbeing Index	Composite score from annual resident surveys covering health, safety, and social cohesion.
	Accessibility of tourism experiences	% change year over year in # of tourism businesses meeting accessibility standards (e.g., wheelchair access, multilingual services).
	Cultural heritage preservation	% change year over year in # of new and existing cultural heritage sites actively maintained or restored with tourism funding.
	Participation in local events	% change year in attendance figures for community-led and Indigenous cultural events supported by tourism.
	Youth engagement in tourism	% change year in number of youth (under 25) participating in tourism employment, training, or volunteer programs. Number of internships.
	Social inclusion and diversity	% change year in proportion of tourism sector employees from underrepresented groups (women, Indigenous Peoples, newcomers, visible minorities, seniors).
ECONOMIC	Indigenous tourism business growth	% change year over year in # of Indigenous-owned tourism businesses in the corridor.
	Tourism employment rate	% change year over year in total number of direct and indirect jobs generated by tourism, disaggregated by demographic group.
	Local economic impact	% change year over year in savings per household on tax offsets from visitor spending.
	Small business development	% change year over year in # of new business licenses issued for tourism-related

	KEY PERFORMANCE INDICATOR	METRIC
ECONOMIC	Tourism-driven investment	% change in annual \$ value of public and private investment in tourism infrastructure and services.
	Seasonality reduction	% change in monthly visitor numbers outside peak season (shoulder and off- peak growth) or “Value Season” vs “High” Season.)
	Average length of stay	% change in average number of nights per visitor within the corridor
	Workforce training and upskilling	% change in number of tourism workers completing certified training or professional development each year and/or businesses have completed sustainable business training
ENVIRONMENTAL	Indigenous-led stewardship initiatives	% change year over year number of environmental stewardship projects led or co-led by Indigenous communities.
	Protected natural area coverage	% change year over year of corridor land/water under formal conservation or protection status.
	Biodiversity health index	% change year over year in indicator species populations or habitat quality (as measured by field surveys), or a “whale score” (number of spotted whales).
	Carbon footprint per visitor	% change year over year in average greenhouse gas emissions (kg CO2) per visitor trip, including transport and accommodation.
	Waste diversion rate	% change year over year in volume/tonnage of tourism-related waste diverted from landfill (recycling, composting).
	Water quality in key sites	% change year over year in water quality standards of monitored sites (both meeting and/or exceeding standards).
	Sustainable transport adaptation	% change year over year in number of visitors using low-emission or active transport options (e.g., e-bikes, electric ferries, shuttles).
	Visitor education on conservation	% change year over year in number of tourism operators actively providing environmental education or stewardship messaging to visitors.

TOURISM CORRIDOR INVESTMENT PLAN

Investment plan approach

For the Juan de Fuca Tourism Corridor to truly become the flourishing place described in the Vision, connected by sustainable tourism experiences that deliver shared benefits to all that live within it, the research and engagement first and foremost pointed to the **need to align experience and infrastructure development with the Strategic Pillars**. It was identified that certain gaps and barriers could be addressed through investment, by **forming connections**. Most notably, multi-modal transportation options to physically connect the corridor, and an attraction or gathering place to enhance cultural, social and ecological connections.

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In addition to forming connections, the following principles were also considered to help identify appropriate tourism investment opportunities for the Juan de Fuca Tourism Corridor:

- Identify opportunities to attract the highly engaged “Outdoor Explorers” market; retain existing and generate new interest in the corridor.
- Look for gaps that could become opportunities for private sector interest or Private Public Partnerships (P3s).
- Select opportunities with connections to benefit residents and visitors in the long-term.
- Consider projects that can be phased and/or enhanced over time and have strong potential for market growth in future.
- Aggregate projects to increase investment attractiveness & create more blended financial options.
- Ensure development opportunities provide strong returns for potential investors and economic impact for the communities.
- Build on shared values rooted in the Juan de Fuca Bioregion Tourism Corridor: **regeneration, reconciliation, respect for residents**.

Tourism investment opportunity identification

The opportunity identification process involved a review of the corridor tourism asset/experience inventory and subsequent gap analysis, analysis of resident and operator sentiment, strategic goals and objectives for the corridor, Destination Canada’s Traveller Segmentation target markets, and current levels of market demand in and around the corridor.

A variety of Rights Holders and interest holders were consulted to gain insight into new tourism development/experience opportunities, potential partnerships and ownership/management types, and potential site locations for new tourism assets in the Juan de Fuca Corridor. A short-list of twenty-seven (27) tourism opportunities were grouped into **twelve (12) assets types**.

Short-list of tourism investment opportunities

#	OPPORTUNITY	ASSET TYPE
1	Eco-resort	Accommodation
2	Hostel / limited-service hotel	Accommodation
3	Yoga resort	Accommodation / spa and wellness
4	Festival developmnt (bluegrass, literary, moon jelly, crabs/seafood)	Arts, culture and heritage
5	Multi cultural arts centre	Arts, culture and heritage
6	Museum development (expanding / enhancing)	Arts, culture and heritage
7	Farm to table / innovative dining experiences / hands-on-learning	Culinary
8	Cycling trail development and connections - cross-border	Cycling / e-bike routes and trail connections
9	Eco tourism attraction (skywalk, canopy bridge, etc.)	Eco/edu-tourism attraction
10	Marine education centre	Eco/edu-tourism attractioin
11	Community centre (office space, exhibit areas, meeting/event space)	Event venue / gathering space
12	West shore performing arts centre	Event venue / gathering space
13	Indigenous artisan community gift shop	Experiential retail / Indigenous tourism
14	Waterfront retail and boardwalk experiences	Experiential retail /infrastructure
15	Catamaran / water taxi service / boat tourism	Multi-modal transportation

#	OPPORTUNITY	ASSET TYPE
16	Direct air charters to JDF Communities	multi-modal transportation
17	E-bike rentals and biking infrastructure (weather shelters, bike racks, etc.)	multi-modal transportation
18	Electric trolley bus	multi-modal transportation
19	Passenger ferry service to hub communities (electric)	multi-modal transportation
20	Sea air transportation (helicopters, float planes, etc.)	multi-modal transportation
21	Shuttle service (within and outside the corridor)	multi-modal transportation
22	Mushroom foraging (and other nice experiences)	nature and outdoors
23	Holistic healing centre	Spa and wellness
24	Nordic spa	Spa and wellness
25	West coast adventure college - spa / floating sauna	Spa and wellness
26	Collaborative signage (Indigenous names, easier navigation)	Wayfinding and signage
27	Consistent environmental mapping	Wayfinding and signage

It was determined that only one opportunity would be required per asset type, in order to provide a complementary range of project types and investment options. The following **six (6) tourism investment opportunities** and associated asset types were selected by the Project Team and further validated for evaluation by partners, Rights Holders and interest holders across the corridor:

1. **Indigenous tourism experiences (various)**
2. **Arts and cultural centre**
3. **Bioregional Marine Centre (eco/edu-tourism attraction)**
4. **E-bike routes and cycling trail connections**
5. **Electric passenger ferry**
6. **Wayfinding and digital mapping**

Tourism opportunity evaluation

Each of the 6 opportunity areas was assessed through a tourism investment opportunity evaluation matrix, customized for the study, based on considerations identified in the investment plan approach. Key lenses that were used to evaluate each opportunity, in consideration of generating significant economic impact for residents and appealing to highly engaged visitors, included the following.

Tourism investment opportunity evaluation criteria

LENS	RATED CRITERIA
Private sector investment potential	<ul style="list-style-type: none"> Does it have a strong likelihood of private sector investment? Is there a project proponent/champion identified? What is the level of capital investment? (High, Medium, Low) * Does it qualify for funding through regional and provincial/state trusts? Is it investment ready in the short to midterm?
Site / locational considerations	<ul style="list-style-type: none"> Is there an available site or likelihood of available sites? What is the level of public infrastructure requirements? (High, Medium, Low)* Can it be developed in a desirable location with visibility for highway traffic and/or other demand generators? Could the site(s) be easy to develop with limited constraints (e.g., zoning amendments)?
Market and financial feasibility	<ul style="list-style-type: none"> Does it fill a Market Need? (Level of Competition) Can it operate year-round or extend a season? Does it have the potential to be Economically Feasible? Does it have the potential for strong levels of Economic Impact and Spinoff across multiple corridor communities?
Resident and visitor appeal and sustainability factors	<ul style="list-style-type: none"> Will it enhance packaging and/or clustering opportunities? Does it have the potential to extend visitor length of stay? Does it appeal to, and will it generate demand from the local resident market? Will it have little to no negative impact on the natural environment? Can it tie into and grow existing experiences?

Source: CBRE

The total score for each of the 12 opportunities was calculated by multiplying the opportunity score by criteria weight, for a maximum score of 275 points. With respect to the level of Capital Investment, a high score denoted a low capital cost, and a low score denoted a high capital cost. This criterion score was weighed against an optimal score of five. Similarly, in the case of infrastructure requirements—a high score denotes a low level of infrastructure requirements, while a low score denotes a high level of infrastructure need, which often necessitate

public sector involvement. Based on the preliminary macro analysis, the results identified through the Evaluation Matrix, and the findings of the opportunity workshop, the following tourism investment opportunities rose to the top.

- 1. Electric passenger ferry service**
- 2. E-bike route development and trail connections**
- 3. Bioregional Marine Centre**

French Beach



High level feasibility analysis of top three tourism investment opportunities

OPTION 1

Electric passenger ferry service: clean connections

Concept

This concept involves the development of a high-speed electric passenger ferry service connecting Juan de Fuca communities to Victoria in BC, and eventually across the Strait to Juan de Fuca Corridor communities in Washington. The concept of an electric ferry ties directly to the strategic pillar of **Access and sustainable mobility**, as it provides a low-emission mobility option to improve accessibility and reduce environmental pressures. It also helps to create access to lesser-known natural areas that are market-ready (e.g., Port Renfrew and Pacheedaht territory in BC, and Neah Bay in WA), providing links to the **Indigenous land and traditions** and **wayfinding** pillars. This concept therefore not only provides connectivity for visitors, through physical transportation and **edu/eco-tourism**, but for the people that live within the corridor, building on shared values rooted in the Juan de Fuca Bioregion Tourism Corridor: Regeneration, Reconciliation, Respect for Residents.

There are several operators and suppliers that are currently involved in building out net zero ferry routes in the Pacific Northwest; however, as this service requires new technologies, the project team recommends that partnerships are developed with companies providing electric charter services in through other means of transportation (e.g., air). Maintaining the existing connection provided by Black Ball Ferries and the Victoria Clipper, will also be integral to the corridor, providing marine transportation within the Juan de Fuca Corridor (from the port in Port Angeles to the transportation hub in Victoria, BC) and also has capacity for bicycles and e-bikes.

Electric passenger ferries are the latest technology in the maritime industry, with a goal of replacing traditional diesel engines with battery-powered alternatives to reduce emissions, while reducing operational costs and providing a quieter ride for passengers. Conventional ferries tend to produce air, water and noise pollution that not only challenges the environment for passengers but also marine life in a bioregion. From an economic perspective,



Hurricane Ridge ski panorama © John Gussman, courtesy Olympic Peninsula Visitor Bureau

conventional ferries also have higher fuel costs, and both the ferries themselves and the terminals tend to be more costly to maintain and can require longer time periods to meet safety regulations, as many have aging infrastructure.

Local supply/demand influences

Demand for an electric ferry will include visitors to and residents of the Juan de Fuca Tourism Corridor. BC Ministry of Transportation and Infrastructure provides public information on daily traffic volumes across the province. The most recent Average Daily Traffic count for vehicles crossing Highway 14 during the summer months is from 2018 – and demonstrate demand as high as 19,000, dropping to approximately 3,000 travelling to Shirley, BC, and to 1,525 by China Beach along Highway 14 during the same period (92% of Sooke daily traffic). Although traffic counts have fluctuated since 2018, with the decline in road infrastructure quality and erosion over the last 6 years, it is not anticipated that the numbers increased considerably over 2018 peak season counts. It is our understanding that Highway 112 in Washington has similar road issues between the destinations of Sequim and Neah Bay. As such, it can be determined that there is considerable demand for additional modes of transportation in the corridor.



Soul Creek Lodge owned and situated on the Pacheedaht Nation Lands

Several options already exist for navigating the Juan de Fuca Corridor in its entirety. Some already provide regular service, while others require advanced notice for booking custom charter routes and can be quite expensive.

- **Ferry services**

- Example: **The MV Coho (Black Ball Ferries)** is a traditional ferry that can board 1,000 passengers and up to 115 vehicles. This is the only direct marine connection within the Juan de Fuca Corridor, providing a unique, legacy connection. Provides daily service between Port Angeles, WA and Victoria, BC year-round.

- **Seaplanes and other air services**

- Example: **Harbour Air** is North America's largest all-seaplane fleet, and one of the largest in the world, offering over 115 flights daily to 12 destinations on the West Coast (11 within BC, and 1 in WA). Harbour Air provides regular services between Vancouver and Victoria in BC, and Vancouver to Seattle, WA. The service does provide charters (10 ppl capacity), where customs agents come to meet the planes and screen passengers before they board.

- **Sea taxis**

- Various operators offer unlicensed service between smaller communities (e.g. Sooke and East Sooke).

- **Hybrid rental cars**

- Given the focus on responsible travel within the corridor, electric vehicles and hybrid options provide another feasible opportunity

Facility program and capital costs

Beginning with a route set up between Greater Victoria, Sooke and Port Renfrew, BC, an appropriate facility program could include:

- **Two 12-seat electric passenger ferries** (to undertake multiple roundtrips per day)—inclusive of: light food & beverage, gift shop, e-bike / bicycle cargo pods, washrooms, etc.
- **Two passenger terminals** at deep sea ports in Sooke and Port Renfrew, BC—inclusive of: electric charging stations, Border Control offices, washrooms, etc.

Preliminary order-of-magnitude capital costs have been estimated at **\$10 million**, inclusive of the landed cost for vessels, start-up and terminal development costs, but exclusive of border services infrastructure requirements.

Potential funding sources for this kind of investment opportunity could range from general government grants to specific sector-specific programs and non-traditional private sector sources. Sources include, but are not limited to, the following:

- Coast Collaborative
- Pacific Economic Development Canada (PacifiCan) - federal economic development agency for BC
- Oceans Network Canada
- Island Coastal Trust (ICET) - Capital and Innovation Program
- Angel investors
- Environmental agencies
- The J W McConnell Family Foundation - Communities, Reconciliation, and Climate
- Business Development Bank of Canada

Preliminary market and revenue projections

It is estimated that undertaking the pilot and full feasibility study will take approximately 1 year. Building and acquiring the vessels, hiring staff and developing routes are projected to take an additional 2-3 years minimum.

Assuming a 210-day operating season (running primarily from April to November), and two 12-seat vessels, each doing 6 crossings per day, the maximum number of passengers per season would total approximately 30,200 passengers. At 75% utilization, this totals an **estimated 23,000 passengers** during its first year of operation.

In 2023, visitors to Victoria spent an average of CAD \$102 on transportation during their trip (excluding airfare); however, that figure includes both same-day and overnight travels. As a point of comparison, seaplane fares from Vancouver to Victoria, BC, range from CAD \$99 to \$459 one-way (average \$280). Assuming an effective adult fare of CAD \$250 (considering discounts and packaging), to cover the convenience of higher speed, more frequent travel options between Victoria and Port Renfrew, total potential revenues are estimated to reach approximately **\$6 million in year 1** of operation.

Black Ball MV Coho Ferry



Development considerations

Private developers involved in green technology for marine operators represent a limited pool. It is recommended that the Steering Committee begin the process of investment attraction by approaching interested operators and suppliers, such as Future Marine, Greenline Ferries, Hullo Ferries, Artemis, etc., to determine their level of interest in the project. They would also need to work with local communities to ensure interest and buy in, given that the process will involve public marine infrastructure and investment.

While this process is underway, it is recommended that the Steering Committee continue to encourage relationships with seaplane and/or electric air services to provide access across the Strait (Harbour Air, Kenmore Air, Helijet, etc.) and to work closely with Black Ball Ferry Service to maintain the essential service that they continue to provide.

A potential developer interested in investing in an electric passenger ferry service would need considerable support from the local communities in the Juan de Fuca Tourism Corridor and would likely need to consider public funding opportunities (e.g., provincial or federal grants) that favour green transportation. The following steps outline a typical process from an investor's perspective:

- Begin the engagement process with municipal governments and Indigenous leaders to determine interest in an electric passenger ferry service.
- Source grant or other sources of funding to source an existing vessel from a reputable supplier (e.g., Artemis Technologies), develop a potential route, and conduct a pilot exercise for a short period of time (1-3 months) between Victoria and Sooke, and Sooke and Port Renfrew, BC.
- Given the high-risk nature of the full return route, the estimated cost of setting up the route and completing the pilot trial is \$50,000 (one-time fee).
- Cost includes sourcing crew, pilot and maintenance staff. Staff could be sourced from an existing ferry operator or marine transportation operator.

If successful, undertake a full feasibility study, estimated at a cost of approximately \$500,000, to determine:

- Number of vessels required
- Appropriate size of each vessel (e.g., 12-seats)
- Schedule for daily crossings to maximum operating season

- Pricing plan
- Full operating proforma for a 10-year period
- Capital plan

While undertaking the full feasibility study, a developer could consider a standard (as opposed to high-speed) electric passenger ferry service to transport visitors within one or more individual communities, e.g., from one end of Sooke to the other. This process could be completed within 2 years, and the budget has been estimated at \$1-\$2 million, and could be accomplished utilizing existing vessels, which are much easier to attain, as compared to high-speed vessels. The developer would need to engage in discussions with the City of Port Angeles and other potential ports in Washington State to determine requirements for launching cross-border service.

NOTE: *The \$1-2 million has been excluded from the estimated \$10 million investment in 2 high-speed electric ferries and accompanying service.*

Climate resilience and adaptation considerations

SHORT-TERM (1-3 years)

- Add backup communications, clear detour signage, and shelters at transport nodes (ferry/air/bus).
- Adopt best practice standards for route drainage, slope stabilization, fire buffers and coastal protection.
- Display a public map with route status (open/partial/closed), charging stations, water points, cafes, accessible restrooms, campsites, repair shops, plus heat/smoke advisories, wind, landslide, flood, and storm surge/tsunami zones.
- Incorporate ferry/air status feeds; push route-level alerts to DMO sites and rental apps.
- Create simple MOUs with Black Ball Ferry, Harbour Air, BC Transit, park authorities to coordinate closures, detours, and visitor alerts.
- Advocate for inclusion of tourism operators in regional and provincial emergency response planning frameworks.

LONG-TERM (3-10 years)

- Use the Climate Risk Platform to choose low-risk locations for chargers, racks, and wayfinding (e.g., outside flood run-up, away from unstable slopes).
- Adopt climate-resilient designs for any new route, bike rack, dock, or shuttle stops.

- Plan alternative routes during service disruptions or to increase surge capacity during large events.
- Advocate for senior governments and funding bodies to consider relief funding mechanisms for tourism operators impacted by climate events.

Renfrew Pub, Port Renfrew



OPTION 2

E-bike infrastructure and rentals: ride the bioregion

Concept

This concept builds off several key elements deemed significant for both residents and tourists to the Juan de Fuca Corridor. It involves the development of electric bicycle (“e-bikes”) and scooter services to link the District of Sooke to the city of Greater Victoria along the Galloping Goose Trail in BC, and communities along the Olympic Discovery Trail between Sequim and Port Angeles in Washington. As with the electric ferry, this concept ties to the strategic pillar of **access and sustainable mobility**, as it is intended to improve accessibility and reduce environmental pressures. It also has the potential of linking people specifically to the intended electric ferry terminal locations. With the need for mapping and signage, this concept also ties directly to the **wayfinding** pillar, and has the potential of integrating both **arts, culture and heritage and Indigenous land and traditions** in the development of rain shelters, bike racks and other cycling related infrastructure (provided local Tribes and First Nations are included in the development and design process). In this way, the concept builds on Edu/Eco-Tourism and shared values rooted in the Juan de Fuca Bioregion Tourism Corridor: regeneration, reconciliation, respect for residents.

This type of multi-modal transportation can accommodate a wide range of users, so it will be important to consider a service that offers accessible options for mobility issues or injuries. For example, electric sitting bikes, which have full seats and low pedals, electric scooter bikes, are a cross between a scooter or mobility scooter and a bicycle (and typically does not require pedaling) or electric tricycles, which come with 500W front hub motors. Furthermore, these vehicles can be operated year-round, depending on the climate, and would have a long operating season in the Juan de Fuca Corridor. The concept is well suited to capture regular resident use, along with same-day and overnight visitors, particularly families and those interested in outdoor adventure.

Given the existing service offerings and cycling capacity on the MV Coho with Black Ball Ferries, opportunities exist to link existing trails across the Strait. Ideally, a micromobility operator who is interested in providing cross-border service would be an ideal fit for this type of investment. Further public Investment in road infrastructure will help

to expand fleet potential, so that larger companies that already operate can consider expanding service beyond Sooke and Sequim to more remote parts of the corridor (e.g., Neah Bay and Port Renfrew), to address safety and security liabilities. Costs associated with public infrastructure investment have not been included in this analysis, however, CBRE is aware that considerable investment (\$20 million) is already being incorporated into Highway 112 in Washington and e-bike route infrastructure is included within the long-term transportation plans for the Capital District on Vancouver Island.

NOTE: *This analysis makes the hypothetical assumption that issues with trade and tariff negotiations between Canada and the United States are no longer a concern at the time of investment.*

E-bike rentals and sharing programs are already available on Vancouver Island and the Olympic Peninsula. The British Columbia Automobile Association (BCAA), for example, operates Evolve-E-Bike Share, as part of the Evo shared mobility services, in Nanaimo and recently launched service in Langford, BC. Companies like Discover E-Bikes in Port Angeles and Oak Bay Bicycles in Victoria also rent e-bikes on a daily and weekly basis, as long as they are returned to the main rental location. Although charging stations are not available along the major trails, such as the Galloping Goose and Olympic Discovery Trail, e-bikers can use standard electrical outlets in the communities they pass through.

Ruby Beach



Local supply/demand influences

According to data provided by the Capital Regional District (CRD) in BC, bicycle counts for passengers travelling on the Galloping Goose Trail west from Victoria to Roche Cove in the District of Sooke totalled over 36,000 in 2024. CRD representatives estimate that approximately 200 bicycles were recorded entering Port Renfrew in 2024, of which approximately 50% occurred in July, and less than 2% of those were e-bikes.

Given the interest in cycling from both a demographic and visitor profile perspective in both BC and Washington, along with activities involving nature and physical activity, e-bikes and e-scooters could only increase the scope of visitors to include fewer active members of their families and/or travel companions. The proposed outdoor adventure and cultural additions also align with Destination Canada target markets, as does the potential for lower costs when compared to vehicle rental, particularly if there is a ferry ride involved.

In terms of supply, there are several regional communities already working with operators on e-bike services, and other private operators, including (but not limited to):

- Electric Alpine (BC), Oak Bay Bicycles (BC), Cycle BC Rentals & Tours, Evolve E-Bike Share (BC), Lime Micromobility (BC + WA), Puget Sound to Pacific program (WA), Ben's Bikes (WA), Elwha eBike Adventures (WA), Discover E-Bike (WA), 7 Cedars Casino—e-bike rentals (WA)

Juan de Fuca project team members



Facility program and estimated capital costs

The following key elements are recommended for the facility program:

- 200 electric vehicles (140 e-bikes, 60 e-scooters), with a range of options to accommodate accessibility
- 2 permanent offices (including bike storage, maintenance, customer areas, etc.)
- 2 satellite offices (rental desk, customer area and storage)
- 10 vehicles to transport e-bikes and e-scooters to pick-up locations
- Other: 200+ Helmets, 200+ Locks, Route maps, Infrastructure at pick-up locations

Preliminary order-of-magnitude capital costs have been estimated at **\$2.5-\$3.0 million**, excluding dedicated lanes along Highways 112 and 14, and additional trail infrastructure development (e.g., linking Sooke to Port Renfrew in BC, and Port Angeles to Neah Bay in WA).

Potential funding sources include, but are not limited to:

- Province of BC's Electric Kick Scooter pilot project
- Ministry of Transportation and Infrastructure / BC Scrap-it Society—BC Electric Bike Rebate Program based on household income (\$6 million earmarked for post-purchase rebates)
- Government of Canada Active Transportation Fund (ATF)
- NOAA Grant—focuses on resiliency, slope stabilization, and alternative routes; and planning work to help reduce flooding.
- Pacific Economic Development Canada (PacifiCan)—federal economic development agency for BC
- Island Coastal Trust (ICET)—Capital & Innovation Program
- Angel investors
- Environmental agencies
- The J W McConnell Family Foundation—Communities, Reconciliation, and Climate
- Business Development Bank of Canada
- Washington State's HB 1125 program—\$2M designated for a lending library program in addition to purchase incentives; \$90k for UW research relating to e-bike incentives.

Preliminary market and revenue projections

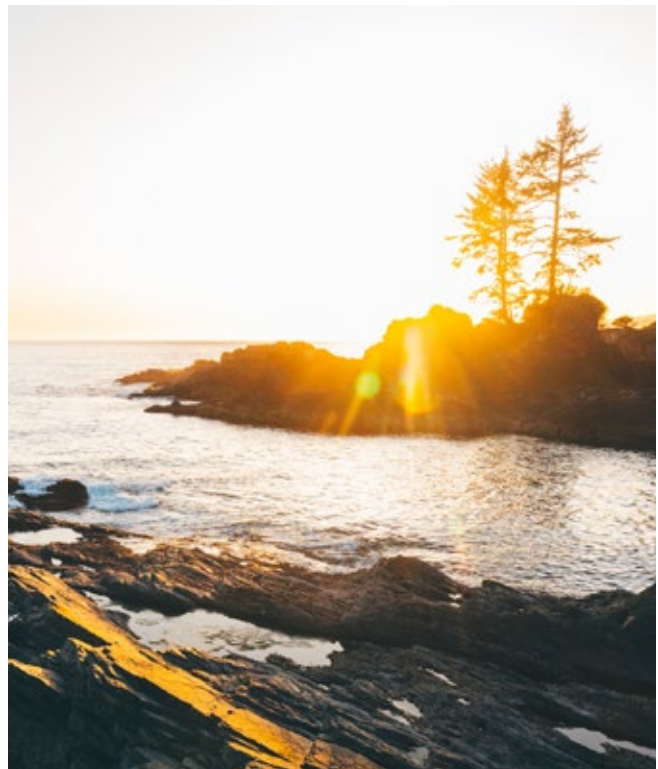
The estimated operating season for an E-Bike Rental service is 240 days, with 90 peak days during the summer months, and 150 off-peak days, operating between March and November.

Assuming 140 rentals/day for e-bikes and 60 rentals/day for e-scooters and an operating season of 250 days in Year 1, the e-bike rental business could capture a maximum of **50,000 potential riders**. At an average utilization of **75% during peak season, and 45% during the off-season**, this equates to a total of **27,000 riders in Year 1**. Establishing an e-bike business can take less than 15 months, however, given the need to establish the business in two countries, at least 2 years would be recommended. Total potential revenue for the E-Bike Rental Service is estimated to reach **\$3.5 million in Year 1**, or an average expenditure of **\$129 per rental**.

Development considerations

As mentioned, this investment opportunity would be best suited for a micromobility operator interested in providing cross-border service. Starting a cross-border e-bike rental company between British Columbia and Washington State will involve navigating several trade-related considerations. For example, a developer would need to align with import/export regulations, in compliance with Canada Border Services Agency (CBSA) and U.S. Customs and Border Protection (CBP). Temporary importation of e-bikes could be considered to reduce duty and tax obligations, if bikes are only in the other country for a limited time. Other compliance considerations that involve both jurisdictions include (but are not limited to) business registration, sales tax remittance, insurance, consumer protection, safety standards and labour laws.

It is suggested that two main offices are considered for e-bike rentals in each country, near the connecting trails. Sooke could be selected as the primary location in BC (with a satellite office at the Inner Harbour Ferry Terminal in Victoria), and at the ferry terminal in Port Angeles, with a satellite office in Sequim for riders on the Olympic Discovery Trail. Although the rental company can recommend standard electrical chargers for guests during the pilot period, sufficient charging stations will be required along the entire route between the ferry terminal in Victoria and the end point in Sooke, along the Galloping Goose, and along the Olympic Discovery Trail between Port Angeles and Sequim, WA. This may require coordination with trail management and related public entities on both



Botanical Beach, Juan de Fuca Provincial Park

sides of the border. BCAA's Evolve E-Bike Share programs has integrated charging stations as part of its rollout and could be consulted as part of this process.

[Discover E-Bikes](#) is a family owned and locally operated business in Port Angeles that provides packages to guests through the Black Ball Ferry Line. Riders can take self-guided tours along the Olympic Discovery Trail and must be over 15 years. The package includes ferry fare, electric bike fit, helmet and directions. Similarly, [Oak Bay Bicycles](#) rents e-bikes to guests from downtown Victoria who have the opportunity to rent E-Mountain Bikes, which can be rented for trips along the Galloping Goose Trail to Sooke and beyond, for up to 7 days (but can be extended). It is recommended that companies like these be considered for future partnerships or inquiries to determine their interest in providing service on both sides of the Canada-U.S. border.

Once established, the developer will need to advocate for permanent legislation for e-scooters in BC (already legal in WA) and develop agreements with operators on both sides of the border who will allow visitors to take an e-bike across the Strait on the MV Coho (Black Ball Ferries). As mentioned, the business will require approximately 2 years before embarking on its first full year of operation but may consider a pilot run before that time.

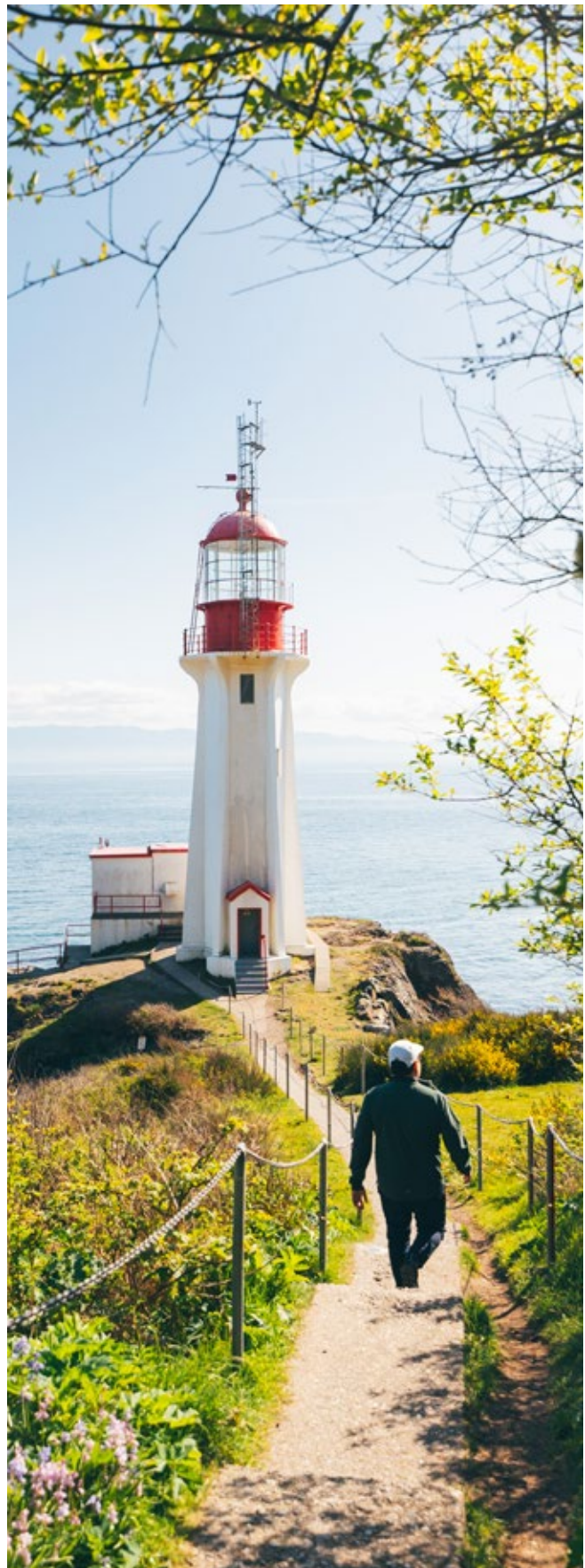
Climate resilience and adaptation considerations

SHORT-TERM (1-3 years)

- Add backup communications, clear detour signage, and shelters at transport nodes (ferry/air/bus).
- Adopt best practice standards for route drainage, slope stabilization, fire buffers and coastal protection.
- Display a public map with route status (open/partial/closed), charging stations, water points, cafes, accessible restrooms, campsites, repair shops, plus heat/smoke advisories, wind, landslide, flood, and storm surge/tsunami zones.
- Incorporate ferry/air status feeds; push route-level alerts to DMO sites and rental apps.
- Create simple MOUs with Black Ball Ferry, Harbour Air, BC Transit, park authorities to coordinate closures, detours, and visitor alerts.
- Advocate for inclusion of tourism operators in regional and provincial emergency response planning frameworks.

LONG-TERM (3-10 years)

- Use the Climate Risk Platform to choose low-risk locations for chargers, racks, and wayfinding (e.g., outside flood run-up, away from unstable slopes).
- Adopt climate-resilient designs for any new route, bike rack, dock, or shuttle stops.
- Plan alternative routes during service disruptions or to increase surge capacity during large events.
- Advocate for senior governments and funding bodies to consider relief funding mechanisms for tourism operators impacted by climate events.



Sheringham Point Lighthouse

OPTION 3

Bioregional Marine Centre: living sea, living stories

Concept

A Bioregional Marine Centre has the potential of capturing all elements of the Juan de Fuca bioregion. The Juan de Fuca Bioregional Marine Centre is an edu/eco-tourism attraction, that functions as a cross between a sanctuary for marine life and other wildlife, an interpretive centre, and cultural centre for Indigenous heritage with storytelling space. As such, it directly ties to **edu/eco-tourism, Indigenous land and traditions, and arts, culture and heritage.**

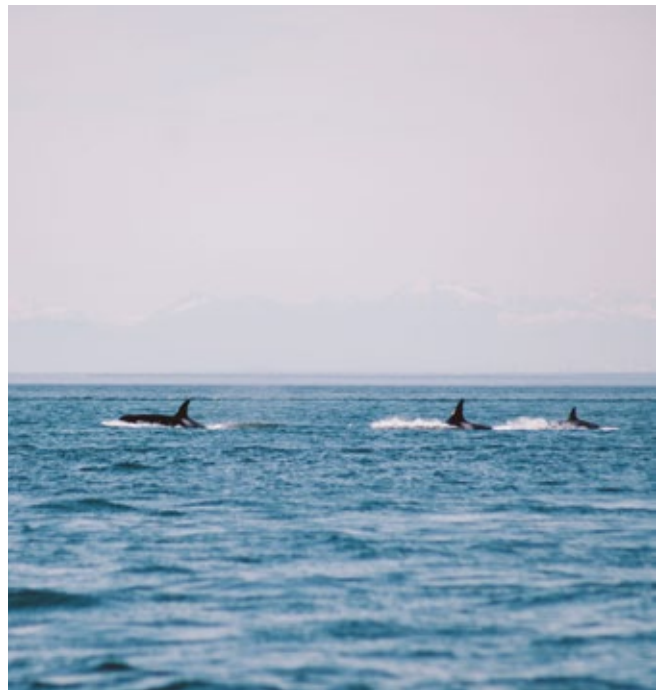
From an investment perspective, the concept is envisioned as a permanent hub facility in Sooke, BC with a smaller satellite location in Port Renfrew, and the potential to connect with similar centres around Vancouver Island and the Olympic Peninsula. Ideally, a temporary hub is developed in Sooke by 2028, to complement the Marine Discovery Center opening in Port Angeles. The Port Angeles facility will be replacing the seasonal Olympic Coast Discovery Center visitor center and Feiro Marine Life Center, and become part of the Port Angeles Waterfront Center, joining the existing Field Arts and Events Hall and the future Lower Elwha Klallam Tribe cultural center. Ideally the two locations will incorporate cultural elements from local First Nations, who will need to be included within the development planning.

It will be important that the proposed Bioregional Marine Centre facilities in Sooke and Port Renfrew complement existing facilities and programming with other marine life facilities and attractions, i.e., new Marine Discovery Center in Port Angeles, Shaw Centre for the Salish Sea in Sidney, BC, amongst others. As important it will be ensuring facilities are accessible, thereby ensuring adherence to the strategic pillar for **Access and Sustainable Mobility.**

Local supply/demand influences

Residents of and visitors to the Juan de Fuca Tourism Corridor will be interested in the subject Bioregional Marine Centre. According to data provided by the **Sooke Region Museum and Visitor Centre**, residents, school tours (mainly from the District of Sooke, but also Colwood and Langford) and leisure tourists visit on a regular basis. Total visitors to the Sooke Region Museum and Visitor Centre (including all who entered the building) totalled **40,000 in 2024³.**

³ Sooke Region Historical Society Annual Report 2023-2024 (<https://sookeregionmuseum.ca/mission>)



Orca whales, Juan de Fuca Strait

Although the Marine Discover Center in Port Angeles is not yet open, operators of the existing Feiro Marine Life Center and the Olympic Coast National Marine Sanctuary anticipate the new 13,000 square foot building will attract an estimated 75,000 visitors annually. The current location attracts over 20,000 visitors annually.

In terms of comparable Marine Centres and Cultural Centres, in addition to the Sooke Region Museum, the following are notable examples:

1. Marine Discovery Center, Port Angeles, WA (Opening 2028)

The Feiro Marine Life Center and Olympic Coast National Marine Sanctuary are joining together as a private/public partnership (P3) to form a Marine Discovery Center in Port Angeles.

2. Bamfield Marine Sciences Centre, Bamfield, BC

World-class teaching and research facility located on the outer west coast of Vancouver Island.

3. Shaw Centre for the Salish Sea, Sidney, BC

Connects the public with the Salish Sea Bioregion and its ecosystems through engagement, knowledge and awareness.

4. Makah Cultural and Research Center Museum, Neah Bay, WA

Provides a glimpse of pre-contact Makah life and cultural traditions, including whaling and fishing.

Facility program and estimated capital costs

Development of a temporary facility in Sooke is an important step for generating interest and enthusiasm from the local community, as well as visitors entering the Juan de Fuca Corridor from Victoria. As new exhibits are co-created and displayed on a temporary basis, artists, educators and other experts can provide a “taste” of the place, while determining how best to interpret their knowledge in more permanent ways.

Two phases are recommended for development:

PHASE 1: involves the purchase a typical and well-finished **1,500 square foot modular building**, inclusive of mid-range finishes, more customization options, and energy-efficient design, including a small Lobby / reception area with small retail outlet, 3 “experience” areas, and administration and storage areas.

This type of facility would cost **\$250,000 to \$400,000**, inclusive of site preparation, but exclusive of land costs.

PHASE 2: involves development of a 7,500 square foot permanent building in Sooke with a more detailed facility program, inclusive of the following core areas:

- Public areas: lobby and reception, retail area, public washrooms, etc.
- Cafe and kitchen, including a 40-seat dining area featuring light meals
- Exhibit / experience areas
 - Living exhibits
 - Cultural exhibits
 - Gathering space with Indigenous heritage components for events and storytelling
- Classroom / education area, including a 50-seat classroom with lab

Preliminary order-of-magnitude capital costs for the permanent structure have been estimated to reach **between \$4.0 and \$6.0 million**, assuming a cost per square foot between \$600 and \$750 (exclusive of land).

It is also recommended that a **satellite facility is established in Port Renfrew** in Phase 2, similar to the modular facility developed in Sooke for Phase 1, as a pilot. It is recommended that the modular structure from Sooke is transported to Port Renfrew when the permanent structure opens in Sooke. Once in Port Renfrew, the facility

program would remain the same, but the gathering space with Indigenous heritage would reflect the Pacheedaht First Nation. High-level estimated costs to transport the 1,500 SF modular building would be **\$50,000**, given the challenging 100km route. These costs include permits, specialized trailer, crane rental at either end, and pilot cars to help direct and protect the trailer, as well as site preparation in Port Renfrew.

Construction and fit-out for the two facilities are expected to take **2-3 years**. As such, the earliest the permanent facility could open would be 2030. This will help the potential developers track success of the Marine Discovery Center in Port Angeles and potentially initiate an exhibit or research exchange program.

Total costs – phases 1 and 2

Including exhibit acquisition and land acquisition, order-of-magnitude capital costs for phases 1 and 2 have been estimated to reach between **\$6.0 and \$8.0 million** but could reach much higher depending on the quality of finishes and extent of the programming for the exhibit / experience areas.

Potential funding sources for investment into a Bioregional Marine Centre include, but are not limited to, the following:

- Pacific Economic Development Canada (PacifiCan)—federal economic development agency for BC
- Oceans Network Canada
- Island Coastal Trust (ICET)—Capital & Innovation Program
- Joint Economic Development Initiatives (JEDI)
- Canada Cultural Investment Fund
- Federal (Canadian) Museums Assistance program
- Digital Museums Canada Investment Program
- Canadian Heritage—Indigenous Heritage Museums Assistance Program
- Business Development Bank of Canada
- National (U.S.) Endowment for the Arts
- The Washington State Historical Society’s Heritage Capital Projects grant and Diversity in Local History grant
- Universities and Colleges (e.g. West Coast Adventure College, Vancouver Island University, etc.)

Preliminary market and revenue projections

Assuming the Phase 1 facility is open for an extended summer season (May through September) in Sooke, that represents approximately 153 operating days. Visitation will include a mix of local residents, visiting friends and relatives, and summer tourists.

Once the permanent facility and satellite facilities are open in Phase 2, the Centres are expected to penetrate the interested local resident and visitor market to the Juan de Fuca Tourism Corridor at 5%, representing approximately **50,000 visitors in Year 1**, with potential to grow to 70,000 visitors once stabilized.

Assuming an effective ticket price of \$30 (to account for discounting and packaging), and additional per capita revenue of \$10 (including retail, food & beverage, special event pricing etc.), total potential revenues are estimated to reach **\$2.0 million in year 1**.

Development considerations

The development could potentially involve a public-private partnership structure (“P3”), which may take time to consolidate. At the time of this report, there were several

Olympic National Forest above Hoodspout with Olympic Mountains
© Explore Hood Canal



developers looking to invest in the subject project. It is recommended that interested private sector investors seek opportunities to connect with local institutions or government economic development agencies to move the project forward (e.g. to share land, help secure capital funding, and curate exhibits).

Once the P3 structure is in place. It will be important to start incorporating elements of Juan de Fuca Bioregion (wildlife, culture, Indigenous heritage) in collaboration with local First Nations, artists, biologists, etc. It will also be important for facilities and programming to connect with other marine life facilities and attractions in other destinations, i.e., the new Marine Discovery Center in Port Angeles, and Shaw Centre for the Salish Sea in Sidney, BC, so that best practices, physical exhibits and other programming can be shared and co-created.

Climate resilience and adaptation considerations

SHORT-TERM (1-3 years)

- Acknowledge available climate hazard maps in corridor materials and reference them when relevant to tourism planning conversations.
- Share existing provincial and federal resources on climate-resilient design, adaptation, and emergency preparedness funding when appropriate.
- Recognize climate-smart features (e.g., passive cooling, renewable energy) as positive attributes in investment and implementation discussions.
- Position climate-readiness strengths as a key criterion in promoting the corridor as “investment-ready”.

LONG-TERM (3-10 years)

- Promote and package experiences that adapt to changing conditions (e.g., noctourism for heat, winter-ready festivals, flexible itineraries).
- Advocate for investment in event infrastructure that can operate in varied weather conditions.
- Advocate for communities to align new experience development with areas less exposed to climate hazards, using available risk mapping as guidance.
- Support local colleges, Indigenous training centers, and tourism associations by sharing corridor priorities and examples that help embed climate change, sustainability, and crisis management into workforce development programs.

Investment opportunity summary

The following chart summarizes the top three investment opportunities comprising the Juan de Fuca Investment Plan; required to consolidate the area as a flourishing place for residents to live and visitors to explore.

Feasibility summary for top three investment opportunities in the Juan de Fuca Tourism Corridor

OPPORTUNITY	DESCRIPTION	SITE CONSIDERATIONS	CAPITAL COST ESTIMATE	YEAR 1 VISITATION + REVENUE
Electric passenger ferry	High-speed electric passenger ferry service connecting Juan de Fuca communities in BC to Victoria, and eventually across the Strait to corridor communities in WA via Port Angeles.	Deep sea ports, charging infrastructure, specialized terminals, road access, site service, Border Services, close to other demand generators.	\$10.0 million (two 12-seat ferries, terminals, route development)	23,000 passengers / \$6.0 million
E-bike infrastructure + rentals	E-bike and e-scooter services to link Sooke to Victoria along the Galloping Goose Trail in BC with the Olympic Discovery Trail between Sequim and Port Angeles, WA. Cross-border link on the MV Coho.	Two main rental office sites per country (e.g., Sooke, Victoria Port Angeles, Sequim), shuttle service for pick-up/drop-off, charging infrastructure, road access, site servicing.	\$2.5-3.0 million (200 vehicles, offices, shuttles)	27,000 passengers / \$3.5 million
Bioregional Marine Centre	Edu/eco-tourism attraction that functions as a cross between a sanctuary for marine life and other wildlife, an interpretive centre, and cultural centre for Indigenous heritage with storytelling space.	Hub site in Sooke and satellite in Port Renfrew, alignment with Marine Discovery Center (opening in Port Angeles, WA), road access, situated close to the Salish Sea, required site service.	\$6.0-8.0 million (Phase 1: modular facilities for Port Renfrew and Sooke pilot. Phase 2: permanent structure in Sooke)	50,000 visitors / \$2.0 million

Source: CBRE



Port Renfrew

Additional investment and business development opportunities

Beyond the top three tourism investment opportunities, a variety of other opportunities could be considered during the implementation of the subject corridor report. Some are considered business development opportunities, while others are projects that require public sector investment into infrastructure, or for the three core opportunities to be developed, before attempting to attract developers.

Wayfinding

The corridor needs integrated signage and storytelling to attract target markets and grow. This means a coherent physical and digital wayfinding system that maps geography and reveals regional stories— Indigenous territories, protected habitats, marine life, and cultural sites.

Cross-border consistency in look and feel is key, potentially including Indigenous languages (if appropriate), cultural motifs, and imagery for blue/green spaces. Existing

heritage signs in Sooke and Indigenous street signs in Pacheedaht First Nation offer a base to build on. Digital tools should highlight accessible trails, cycling routes, and sensitive areas to avoid, supporting both navigation and stewardship. The need for stewarding the increased number of visitors is crucial for the residents and the (protected) areas.

Arts, culture and heritage

The strategy prioritizes multi-use arts and culture centres, such as a proposed Sooke venue complementing the Field Arts & Events Hall in Port Angeles. A large Sooke hall is unlikely given Langford's planned West Coast Cultural Centre, but strong cooperation between hubs is recommended, along with a smaller cultural presence in Sooke. Cross-border programming can link symphonies, orchestras, festivals, and travelling exhibits. Artist exchanges and residencies can deepen ties and diversify offerings.

Indigenous tourism experiences

Investment in Indigenous-led cultural and tourism initiatives is defined as a clear priority. From engagement sessions, opportunities emerged to support Indigenous-owned campsites, guided tours, cultural mapping projects, and workshops in traditional skills. These experiences would complement existing cultural assets in the region and build on initiatives already underway, while ensuring that leadership, ownership, and benefit remain firmly with Indigenous communities. It is unlikely that one large-scale development will meet every need across the corridor. Instead, the strategy envisions a network of Indigenous-led experiences—cultural interpretive sites, canoe journeys, storytelling events, and culinary showcases—that connect visitors more deeply to place. Ideally, this network will include shared programming across the Strait, with opportunities for cross-border exchanges of knowledge, traditions, and practices.

The strategy further recognizes the role of Indigenous art and storytelling in animating public spaces and regional trails, creating living platforms for cultural expression. There will not be one and the same language or expression, as multiple Indigenous are involved, but through Indigenous art patterns the story of the area can be told. In this way, Indigenous tourism is not a separate strand, but integral to the corridor's identity—grounding the Juan de Fuca region in its original voices while opening new opportunities for cultural and economic development.

Sooke Harbour House



Tourism support infrastructure

The corridor plan is a leverage strategy aimed at attracting large-scale investment that will bring more people to the region by 2030, thereby stimulating greater demand for supporting businesses like accommodations and food services. At the same time, the current approach is a sustainable strategy that takes present market realities into account and aims to help existing businesses thrive.

Accommodations

CBRE's analysis of accommodation performance in the BC side of the corridor confirms that while there may be a "need" for additional accommodation facilities, sufficient demand does not currently exist to support development of a traditional hotel or resort. As a point of comparison, the Juan de Fuca properties achieved 42% occupancy, or 57,000 occupied room nights for the year, while Greater Victoria properties reached 73% occupancy and almost 960,000 room nights in 2024.

New hotels should only be considered when occupancy rates in hubs (e.g., Sooke, Port Angeles) consistently exceed 65%, to ensure sustainability of existing businesses and meet growing levels of demand. While occupancy levels in the Juan de Fuca area in Washington State were not available, current occupancy levels on the BC side are still relatively low, so the priority should be to enhance experiences across the corridor and support local accommodation operators. There may be potential to Invest in small-scale, eco-friendly lodging—glamping on farms, Indigenous-owned lodges—and other opportunities that match the region's regenerative tourism ethos.

Culinary experiences

The Port Angeles Crab Festival shows the potential of culinary tourism, though year-round availability in restaurants is a challenge. Similar events could celebrate lavender, crab, farm-to-table cuisine, and BC's seaweed industry, possibly as a base for vegetarian cuisine. Farmers' markets, farm-to-table restaurants, and culinary trails can link visitors to local producers and chefs. Restauranters, event organizers, and agri-tourism operators can create new experiences and products that showcase local food and strengthen supply chains.

TOURISM CORRIDOR IMPLEMENTATION PLAN



Pacheedaht Campground

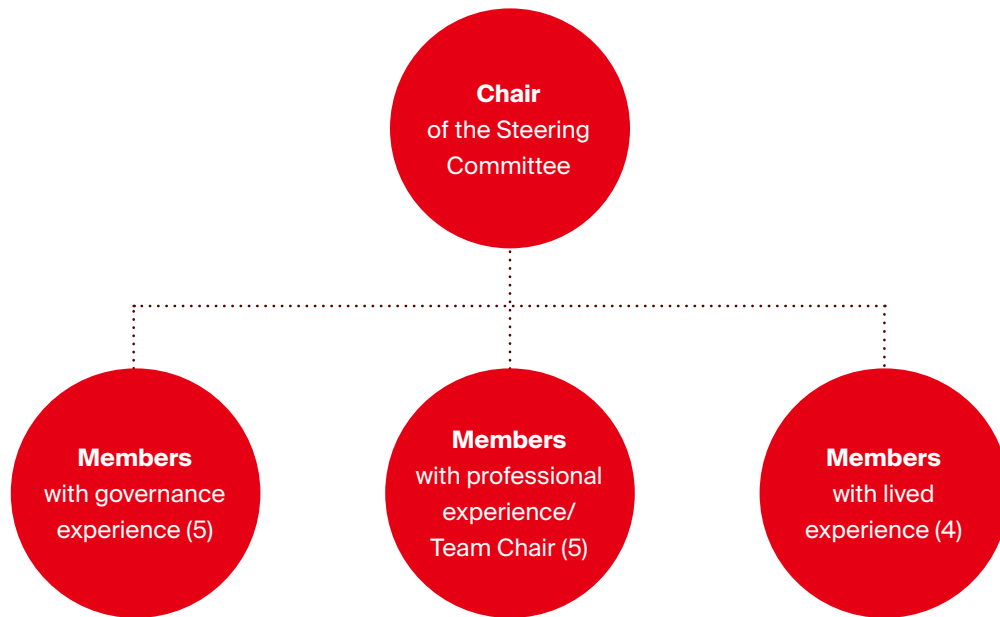
Phasing

In order to effectively rollout the Juan de Fuca Tourism Corridor Strategy and supporting Investment Plan, the Implementation Plan has been organized into four phases, which are further detailed in the following section.

Implementing plan phasing

PHASE	STRATEGIC ACTIONS
1. Build the foundations	Establish the governance structure, initiate corridor communication, validate pilot activities and prepare 2026 budgets.
2. Prepare and pilot	Prepare for investment attraction, use the opportunity of FIFA 2026 to build awareness, and run the pilots.
3. Expand and integrate	Encourage implementation of the top tourism investment opportunities, develop and integrate other supporting businesses, start targeted marketing and communication and strengthen governance & partnerships.
4. Evaluate and engage	Evaluate results after 5 years of implementation and share with all interest holders, so there's opportunity to celebrate and foster relationships.

1. Build the foundations



1.1. Establish the governance structure

Robust governance is essential to support the development of this first transnational Tourism Corridor. A geographically balanced Steering Committee will be established, responsible for implementing the strategy and investment plan.

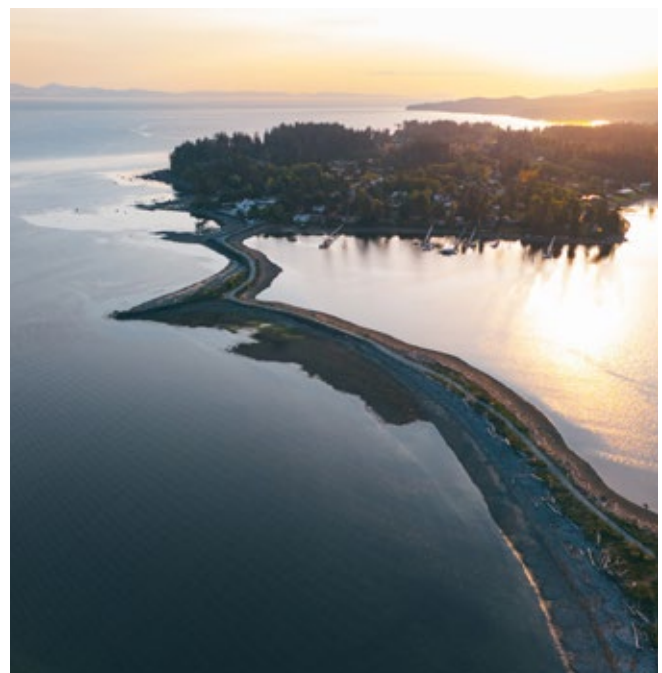
This Steering Committee has a clear and inclusive composition: members with lived experience (including Indigenous and non-Indigenous residents), professional expertise (such as marine life, cycling, transportation, culture, and marketing), and governance experience from relevant Canadian and U.S. organizations. This decentralized and inclusive structure is designed to meet the requirements for alternative, bioregional funding facilities.

In addition to the Steering Committee, working groups (subcommittees) may be formed to support the detailed execution of strategic investment programs. Vice-Chairs may also be appointed. Project management and administrative support will be provided to ensure effective governance, including agenda management, minute-taking, correspondence, knowledge sharing, and reporting, enabling volunteer board members to contribute professionally.

Steering committee priorities in 2025

- Further develop the steering committee
- Prepare and launch corridor communication to announce the cross-border project (1.2.)
- Develop and validate activity plan and budgets for 2026 (1.3.)

Sooke





Sequim Lavender

1.2. Initiate corridor communication

Corridor communication for interest holders

The development of this corridor plan was accompanied by an extensive engagement and participation process. This started a relationship fostering transparency, collaboration and shared stewardship across the bioregion. The following objectives will further steer communication for interest holders:

- **Build trust and transparency:**
Ensure all interest holders are regularly updated on strategy, progress, and opportunities.
- **Facilitate collaboration:**
Create channels (see table below) for active participation, feedback, and joint problem-solving.
- **Support governance and investment:**
Provide timely, relevant information to enable effective decision-making and attract appropriate investment.
- **Facilitate exchange of information:**
Create the opportunity for interest-holders to share their information with other interest-holders in the corridor. This exchange does not currently exist and prevents businesses from promoting and exchanging ideas with other businesses in other parts of the corridor (cross-border marketing opportunity).

Next steps

The Steering Committee will ensure a website is launched with core interest holder information and the first interest holder newsletter are launched in Q4 2026, before year-end. This timeline will allow all interest holders to have the website as a reliable point of reference as soon as the engagement to join the 2026 pilots begins.

Corridor communication for visitors

This is not a typical promotional plan. The following outlines guiding principles for communication that supports regenerative development:

- **Storytelling is central:**
Development without storytelling is invisible; storytelling without authentic development is hollow. Even in early phases of development, it is worth telling the story.
- **Travelling the bioregion is at its core an educational story:**
The corridor is a living classroom for climate awareness and stewardship. Visitors will learn the nice and scary things that can happen in this bioregion, and what has done to protect the future. The Bioregional Marine Centre will serve as an excellent place to highlight those stories.
- **Branding is bottom-up:**
Reputation is built through consistent actions and authentic experiences people are happy to share, not campaigns or slogans.

Marketing in the Juan de Fuca Corridor is not just promotion—it is an integrated practice. This approach connects development with communication, aligns infrastructure with values, builds community pride, and empowers local voices. Indigenous partners have agency to narrate their heritage and future visions. Authentic tourism development rooted in the place and relationship-building with local communities come before promotion. Together they create the story about the development that will be told.

- The visitors (passionate communities) are very motivated to visit this area and support regenerative tourism. They take care of the environment and are interested in the people living there. Attracting them can be done with the passionate communities that are present in the Juan de Fuca area, e.g. shipwreck diving community.
- The Juan de Fuca Strait has low recognition in general. Not many residents even know what's on the other side of the Strait. Building awareness for this unique area and putting it on a mental map is a key objective for both resident and visitor.
- Wayfinding is an important aspect that needs to be developed, not just to indicate directions, but as part of the story that needs to be shared.

Port Angeles © J Gussman



Next steps

It is important to have the most important visitor information and the communication channels ready in the course of Q2 of 2026 to capture the opportunity of the World Soccer Championship. In that way there's enough time for other organizations (FIFA, Vancouver, Seattle, Washington State, DBC, etc.) to include the corridor in their communication, fam or press trips. Afterwards, communication can be further developed following the above guidelines.

1.3. Validate pilot activities and prepare budgets for 2026

In order to execute the pilots for the e-bike, ferry and the Bioregional Marine Centre in Sooke there will need to be a high-level activity plan prepared for 2026-2027, as the implementation of these pilots is projected for 2026 or 2027 at the latest. There will also need to be an activity plan and budget approval for the communication that needs to be developed for the FIFA opportunity.

2. Prepare and pilot

The following is a list of preparation considerations for corridor interest holders to consider in order to effectively attract private sector (or private-public partnership) investors.

Initial considerations when attracting new investment

- Economic development departments aim to make their communities investment ready. To attract funding and suitable development in the Juan de Fuca Corridor, the committee and partners must understand sector needs.
- The study provides high-level operating projections and investment implications for three new tourism assets. Using industry standards, it offers key indicators for investors, along with site and location considerations for future planning.
- Findings confirm demand for all three opportunities across multiple segments. Attracting private developers will require a business plan showing sufficient returns.
- Before seeking investors, the steering committee should balance project types. While the evaluation matrix ranks opportunities by investment potential and market demand, factors like destination appeal and site availability also matter. Additional opportunities may be pursued in the long term.

Harbour House, Sooke



Strategic framework for tourism investment attraction

The following provides recommended strategic approaches that the Steering Committee for the study subject should consider in order to begin the process of attracting investors:

Define an organizational structure for tourism investment attraction in the Juan de Fuca Tourism Corridor

- The Juan de Fuca Corridor steering committee needs to continue work on implementing the subject study results.
- Identify roles and responsibilities within each community to consolidate results and follow-up where appropriate (i.e. confirming locational needs and potential sites, list of municipal incentives, etc.).
- Leverage existing expertise, e.g. funding, communications, and resources to assist other members on the committee with investment attraction related initiatives to support.

Consider locational needs and sites for top 3 investment opportunities

- For each opportunity, consolidate recommended requirements for site size, zoning, and servicing.
- Vet and enhance the list of potential sites continuously.

Develop a communication pitch plan to build awareness of investment opportunities in the Juan de Fuca Tourism Corridor

- Make sure the communication team develops a toolkit / presentation material to take to Juan de Fuca Corridor interest holders (i.e. development community, economic development officers, council members, etc.):
- Communicate results of the subject study.
- Demonstrate why tourism is important to economic development (i.e., visitor activities, total tourism businesses and jobs, enhancements to quality of life for residents, etc.).
- Include “success stories”—recent tourism investment in the Juan de Fuca Corridor (i.e. new farm breweries in the area, growing festivals and events, expanding regional airports, etc.).
- Identify local, regional and provincial tourism investment resource details.



Haliwoods Fish & Chips, Port Renfrew

- Host a corridor community forum to discuss results of the subject study, and invite all participants involved in the study consultation, tourism operators, colleagues, planners, potential investors and Councilors.
- Attend events geared to the investment community, i.e. Invest in Canada Foreign Direct Investment (FDI) events Destination Canada and TIAC events (e.g. Rendez-vous Canada), Destination BC events.
- Invite Business Development Bank of Canada representatives to Juan de Fuca Corridor working advisory committee meetings (at least once annually) to encourage two-way communication and stay current on relevant programs.
- Encourage education of the economic development community on tourism investment opportunities via relevant presentations.

Develop a funding model to support key investment attraction in the Juan de Fuca Tourism Corridor

Clarify potential incentives to attract development in Juan de Fuca communities:

- Research access to capital, study funding and operating investment programs that might **be applicable to the top tourism investment opportunities identified in this report.**

Apply to various government support programs for funding to entice potential investors, such as:

- The Business Development Bank of Canada, Pacific Economic Development Canada (PacifiCan), Tourism HR Canada (THRC), Industry Canada investment funding, ICE-T (a British Columbia government program that supports the innovation, development, and commercialization of clean energy technologies)

- A full list of funds from Canada (federal, provincial, state, regional) can be found here: [DC Investment-funding-opportunities](#)
- A full list of US grants can be found here: [grants.gov](#) (for federal grants) and [washingtongrants.org](#) (for state grants).

Tap into alternative and specific funding opportunities that align with the specific needs of Juan de Fuca:

- Indigenous supporting funds: specialized funds like The American Indian Alaska Native Tourism Association (AIANTA) or the Tribal Tourism Grant Program from The Office of Indian Economic Development should be contacted regarding potential grants or protocol considerations in the U.S. or The Indigenous Business Development Fund to support employment, training, marketing, operations, and innovation or the Indigenous Growth Fund (NACCA) or Indigenous Tourism Fund Micro and Small Business Stream (MSBS) provides grants to Indigenous tourism businesses for marketing, infrastructure, and experience development.
- Marine life/wildlife like Fish & Wildlife Compensation Program (FWCP)—Coastal Region, Washington Coast Restoration & Resiliency Initiative (WCRR)—RCO or Wildlife Diversity Grants.
- Art and culture grants, like Canada Arts Council.
- Climate funds or grants, like the Gaia Climate Fund.
- Responsible tourism: a new grant of 50 K USD launched by The Port of Seattle (on top of their yearly tourism marketing grant of 20 K USD that could be interesting for FIFA communication).

Create a strong bioregional network around cross-border marine life to access bioregional funding

Establishing within the steering committee a network of partners in marine life conservation on both sides of The Strait will support access to these funding sources, as the core attraction of the Juan de Fuca area is marine life: the whales, the otters, the birds, the sea. It is something to cherish and to protect in the best viable way on both sides of the strait. Although each side of the Strait will have some investment in marine life centres, a networked, collaborative approach outperforms isolated assets and investment massively. This is due to several factors, including:

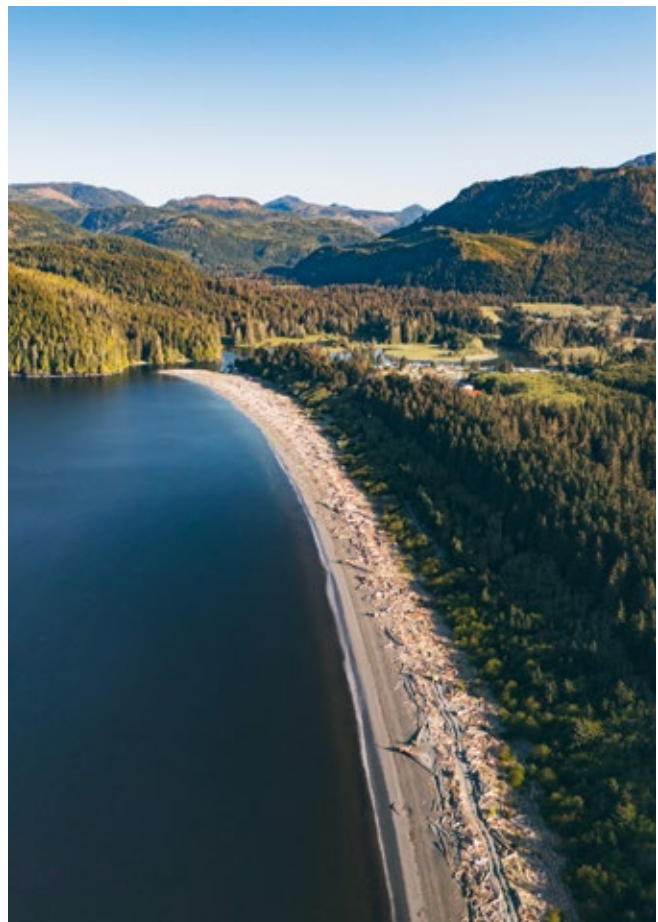
- **It unlocks major funding and investment:**
Coordinated, bioregional networks align with funders' priorities for climate resilience, biodiversity, Indigenous leadership, and local green infrastructure. Bundling projects into a unified portfolio makes the region more attractive for large grants, green bonds, and blended finance.
- **It signals long-term stewardship and resilience:**
A networked approach demonstrates multi-sector collaboration and deep, ongoing care for land, water, and communities—building trust with funders and partners.
- **It enables effective cross-border action:**
Nature transcends political borders; a bioregional network supports coordinated responses to climate change, biodiversity loss, and ecosystem challenges at the right scale. The network can decide what should be managed as a priority and make a case for it.
- **It strengthens cultural and Indigenous leadership:**
A network elevates Indigenous knowledge, supports cultural revitalization, and advances reconciliation, fostering justice and rooted stewardship.
- **It builds shared identity and economic vitality:**
Defining a common story of place based on marine life attracts values-driven investment, supports regenerative tourism and local economies, and fosters a sense of belonging and pride across the region.
- **It is a necessity to tap into bioregional Funding Facilities:**
Bioregional Financing Facilities (BFFs) fund local grassroots projects aligned with ecological and social needs in bioregions, like regenerative farming or reforestation. By raising funds from grants, impact investments, and local contributions, BFFs group and channel resources to initiatives that restore ecosystems

and strengthen communities. This approach ties finance to local well-being, bridging local economies and ecosystems. There's a non-for-profit organization that can support the creation of BFF's called The BioFi Project -501(c)(3) tax exempt nonprofit- is sponsored by the Buckminster Fuller Institute, and they are very active in the Pacific Northwest.

Establish performance metrics and processes for measuring investment attraction success

- Establish a common method for tracking new investment in Juan de Fuca's tourism sector.
- Ensure all members of the Juan de Fuca Corridor Steering Committee are notified quarterly of new investments in the region.
- Educate interest holders throughout the Juan de Fuca Corridor on new investments – e.g. through the recommended communications tools, like e-newsletter.
- Establish other key performance metrics for measuring the success of implementing the subject study results—look at the potential KPI's suggested in this study.

Pacheedaht Nation



Establish partner relationships with the development community

- Develop a list of developers and investors that have already expressed interest in Juan de Fuca Corridor property and contact them with information on the subject study results.
- Explore opportunities for strategic partnerships with a developer or amongst developers in an effort to reduce costs of operation or development.
- Develop and maintain strategic partnerships to support investment, pool funding and assist in strategy implementation.

Develop a plan to investigate additional investment opportunities

- Consider undertaking additional market and financial feasibility work on opportunities for investment in the long term.
- Present information on filtered concepts at Community Forum.
- Consider posting a list of potential opportunities on local Juan de Fuca Corridor community websites.
- Consider ranking filtered opportunities according to current visitor and population growth statistics, i.e., the Juan de Fuca Corridor Steering Committee could look to target the aging population in future as one of the long-term plans.

Consider other opportunities to grow tourism in the Juan de Fuca Tourism Corridor

- Educate local residents and businesses on the importance of tourism as an economic driver, and ensure they promote Juan de Fuca Corridor tourism products and experiences to friends and family, and other visitors to the region.
- Consider undertaking a transportation and wayfinding study to enhance visitation to the area (i.e. extending cycling trails and e-bike routes across the corridor, improving signage on highways, etc.).
- Educate Juan de Fuca Corridor communities to enhance brand recognition and develop a visitor-friendly strategy (i.e. all communities need to be more welcoming, with businesses staying open longer at peak tourism periods, and be engaged in tourism activities).
- Develop a plan to create an online presence for the Juan de Fuca Tourism Corridor.

Consider opportunities to manage potential risk

- Share how potential risks are identified.
- Inform potential investors about mitigations and adaptation strategies that are in place.

Pacheedaht Nation

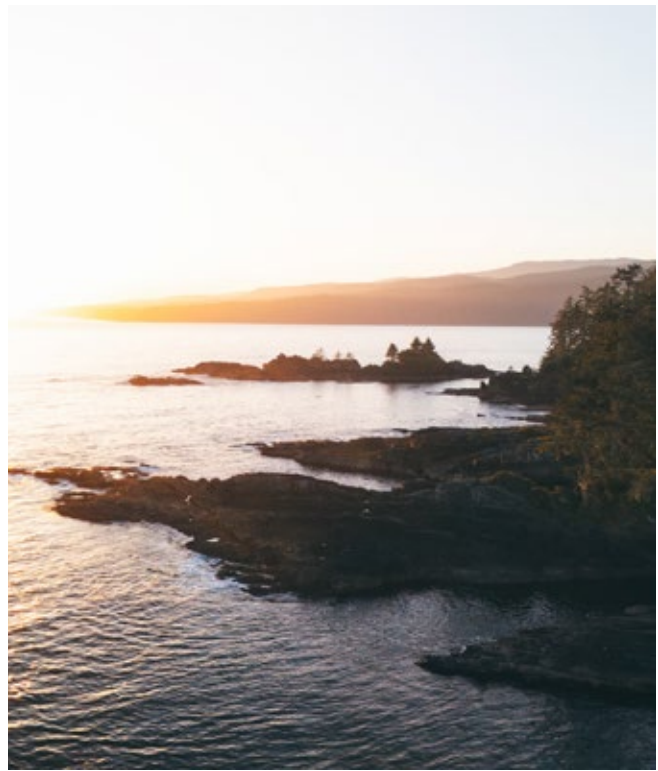


2.2. Use FIFA to build awareness

The FIFA World Championship Soccer 2026 is seen as a key opportunity to launch communications about the corridor and to build awareness of travelling the Salish Sea vtv by alternative routes, rather than just the Seattle–Vancouver highway. This top event attracts many sponsors that might be interested in the area, and in this corridor plan. This is also an opportunity to talk about Juan de Fuca to the press, and to be part of organized press or FAM trips. Finally, it is a big opportunity to communicate about Juan de Fuca area to visitors from across the globe that travel to Seattle or Vancouver, and that potentially have an interest in travelling The Salish Sea bioregion and visiting the Juan de Fuca region. To achieve this, it is key to get the information about Juan de Fuca integrated in existing communication channels in time for this event taking place in June 2026.

2.3. Run the pilots

The following projects are defined as pilots for the key investment opportunities.



Botanical Beach, Juan de Fuca Provincial Park

OPPORTUNITY	PILOT DESCRIPTION	BUDGET ESTIMATE
Electric passenger ferry	Deployment of a 12-seat electric ferry for intra-community transport; monitoring of usage and environmental impact; initial focus on Victoria–Sooke route.	\$1–\$2 million (pilot and feasibility); \$10 million (vessel/start-up costs)
E-bike infrastructure + rentals	Launch of e-bike and e-scooter rental services and route enhancements between Sooke and Langford; promotion of cross-border trail connections via Black Ball Ferry; fleet of 60 vehicles with charging infrastructure.	T\$2–\$3 million (excluding road/trail infrastructure)
Bioregional Marine Centre	Construction of a modular hub in Sooke and satellite programming in Port Renfrew. Short-term modular facility to generate interest and momentum.	\$250,000–\$400,000 (Phase 1 modular); \$4–\$5 million (Phase 2 permanent buildings); Total = \$6–\$8 million

Source: CBRE

3. Expand and integrate

3.1. Encourage implementation of the top three investment opportunities

In this phase the focus will be on expanding the pilots to reach their full potential. For key investment opportunities, this requires the following steps:

Scale up the Bioregional Marine Centre to a network of Bioregional Marine Centers

- Develop permanent facilities in Sooke and Port Renfrew.
- Celebrate the opening of the Marine Discovery Center in Port Angeles in 2028. Expand and align programming of all Bioregional Marine Centers towards that moment.
- Integrate educational, cultural, and conservation programming to serve both residents and visitors.

Scale up Cycling/E-Bike Infrastructure

- Build new, climate-resilient cycling infrastructure extending westward to Port Renfrew (Canada) and Neah Bay (USA).
- Increase and enhance amenities such as charging stations, signage, and rest stops to support year-round use.

Expand electric ferry service

- Extend electric ferry routes to connect Victoria, Port Renfrew, and eventually Port Angeles, based on pilot outcomes.
- Invest in additional vessels and floating terminals as demand and feasibility allow.
- Coordinate schedules and ticketing with other transportation modes for integrated mobility.

3.2. Integrate and develop

The 5-year program is set up to advance the corridor-wide business ecosystem. More specifically, the aim of investing in the recommended tourism opportunities is to also advance:

Indigenous tourism experiences

- Support Indigenous-owned businesses in developing businesses around the e-bike routes, campsites, guided tours, cultural mapping, and culinary experiences.
- Create or join existing business incubators or mentorship programs for Indigenous entrepreneurs, e.g. in the Bioregional Marine Center network.
- Foster cross-border Indigenous tourism partnerships to offer joint experiences and events, e.g. canoe or boat trips.

Arts, culture and heritage

- Strengthen collaboration between cultural centres (e.g., Sooke, Langford, Port Angeles) for shared programming and touring exhibitions.
- Expand artist-in-residence and exchange programs across the corridor.
- Develop public art trails and heritage interpretation projects that link communities and provide new business opportunities for artists and curators.

Culinary and agri-tourism

- Grow Juan de Fuca signature events (e.g., Crab Festival, farm-to-table experiences) and expand culinary trails on both sides of the Strait.
- Support new food and beverage businesses that highlight local products (seaweed, seafood, lavender, etc.).
- Develop partnerships with local farms, markets, and chefs to create immersive agri-tourism packages.

Accommodation and support infrastructure

- Encourage unique, eco-friendly lodging (e.g., eco-resort, glamping, Indigenous-owned lodges) as demand improves.
- Upgrade existing accommodations to meet rising visitor expectations and sustainability standards.
- Invest in support infrastructure (parking, washrooms, digital connectivity) to enhance the visitor experience and enable business growth.

3.3. Targeted marketing and communication

In the expansion phase, target key segments—purpose-driven families, outdoor explorers, and culture seekers -by inviting them to experience new assets and infrastructure, such as enhanced cycling routes, e-bike infrastructure, and expanded marine centre programming. Create excitement with a contest or invitation for first access, starting with a cross-Strait exchange campaign: “Go and discover the other side of your Strait”. This exchange can also be piloted earlier, if possible.

This phase also allows for niche experiences aligned with local passions:

- Mushroom foraging tours led by local experts
- Birding platforms and seasonal wildlife events with guides
- Shipwreck diving expeditions
- Partnerships with relevant clubs, associations, and online communities
- Engagement of influencers and ambassadors to share authentic stories
- Exclusive previews or pilots for these groups to gather feedback and build loyalty

The expansion phase will not only showcase the corridor’s new developments but also cultivate a loyal, values-aligned visitor base that contributes to the region’s long-term regenerative tourism goals. It will increase and strengthen the stories told about the Juan de Fuca bioregion.

Razor Clam Digging, Grays Harbor



Enhance digital platform and wayfinding

- Make sure the website includes itinerary planning, storytelling, and real-time visitor information.
- Integrate physical and digital wayfinding tools to help visitors and locals navigate the corridor and discover lesser-known sites.
- If possible, use the digital wayfinding platform for warnings related to visitor pressure or climate risks.
- Ensure wayfinding reflects cross-border consistency and incorporates Indigenous languages and cultural context.

Education and communication

- The Bioregional Marine Centre will be a place to learn and understand the life in the bioregion.
- In this expansion phase training for people working in the travel and tourism industry should be provided, so they can pass on the information to their guests and teach them how to travel responsibly through the bioregion. The West Coast College already teaches students about outdoor life and would be great to partner to upskill tourism staff.
- Make Juan de Fuca a place to visit for experts like biologists and climate scientists.
- Ensure wayfinding reflects cross-border consistency and incorporates Indigenous languages and cultural context.

3.4. Strengthen governance and partnerships

- Renew the mandate of the Steering Committee in 2028 to oversee expanded implementation, maintain inclusive representation, and ensure accountability.
- Foster and expand ongoing collaboration with Indigenous partners, local governments, and private sector stakeholders.
- Ensure ongoing community engagement and feedback loops to secure buy-in and address emerging concerns.
- Continue and expand the responsibilities taken to implement climate resilience and climate adaptation recommendation.
- Embed environmental safeguards in all expansion activities, including environmental assessments and adaptive management.
- Implement monitoring systems to track progress, visitor impacts, and community benefits.
- Remain flexible and ready to adapt strategies based on data, feedback, and changing conditions.

4. Evaluate and engage

4.1 Evaluation

A thorough evaluation will take place at the end of the five-year program in 2030. The outcomes (ROI) and lessons learnt will be published on the corridor's website and shared with all interest holders.

4.2 Ongoing engagement

In addition to the written report, a communication event may be organized to present the Juan de Fuca Tourism Corridor report to resident communities and local businesses, to foster the build relationships and to celebrate the connections established among all interest holders and investors.

The energy that is present today for a cultural cross border program development could for instance lead to a cultural event that can also serve as an opportunity for renewed engagement and participation, inviting fresh ideas on how to transform the relationships and achievements into a lasting legacy. It will provide a valuable forum for gathering input on potential next steps, should interest holders choose to build on the foundation the corridor has established. If it is not a cultural event, there will be other opportunities that can be used for this purpose. In the next years there will be multiple launches, openings and communication highlights that can be used to celebrate the work already done and to continue the ongoing engagement.

Stoked Pizzeria, Shirley BC

