

Moving Ahead Together on the Sunshine Coast Phase II Engagement Results – What We Heard

February 2021



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Executive Summary

The Moving Ahead Together on the Sunshine Coast engagement project began in August 2020 with broad community engagement on the current challenges and desired near-term solutions for improving ferry travel on the Sunshine Coast. In this first phase of engagement a 19 member Project Working Group was also established. The Group reviewed the community input provided through engagement, and worked together to identify specific ideas for improving Sunshine Coast ferry travel in the near term using the assets BC Ferries currently has. The 11 ideas generated by the Project Working Group and BC Ferries formed the basis for a second phase of broad community engagement.

We recently completed this second phase of engagement for the project. In this phase we proposed 11 ideas for the community to consider, and we asked participants to provide feedback on the ideas they would like us to develop further. The ideas were broken into four topic areas:

1. **Travel Certainty** - Ways to reduce stress and anxiety for those who depend on ferry service
2. **Medical Travel** - Ways to reduce stress and anxiety for those travelling with medical needs
3. **Communications** - Ways to enhance information that can make planning and travelling easier
4. **Demand Management** - Ways to enhance the use of available capacity through the day

During the second phase of engagement, we provided several opportunities for the community to learn more about the ideas being proposed and provide feedback on them. Events included virtual community meetings, online engagement, and paper copies of the engagement placed in community spaces like libraries and public markets. All engagement was virtual in nature in keeping with the COVID-19 restrictions issued by the Provincial Health Officer at the time.

Phase II ran from November 18 to December 9, 2020. During this time 1,600 people visited the project page, 285 people completed the engagement survey, and 40 people participated in virtual meetings.

Community feedback indicated that all 11 ideas proposed were worth moving forward for further development. The community also noted several key considerations to keep in mind while moving forward with idea development, including:

- **Ensuring fairness and equity** – ensuring that changes, especially changes to reservation processes, carefully consider impacts on all travellers, e.g. commuters, medical travellers, Upper and Lower Sunshine Coast residents, those for whom the additional cost of reservations is a barrier to travel etc.
- **Easing travel for those taking more than one ferry** – taking an end-to-end view of the travel experience for those who must take more than one ferry, e.g. Upper Sunshine Coast to Lower Mainland travel
- **Prioritizing and supporting medical travel** – ensuring ease and comfort throughout the travel experience from booking through to arrival for those with medical needs
- **Enhancing access to information** – making key information easy to find, and coordinating with community organizations to enhance distribution and understanding of information

In addition to key considerations, community feedback also revealed divergent perspectives on two topics in particular:

1. **Reservation allocations:** Some community members noted the desire to see the Langdale – Horseshoe Bay route move to 100% reservations, while others noted a desire to do away with reservations completely.
2. **Resident priority:** Some community members noted a strong desire for a system that would provide residents with priority travel to and from the Sunshine Coast, while others noted a strong desire to avoid such a system and keep travel equally accessible to all.

Using the feedback we received, we now begin the work of turning the ideas proposed in Phase II into tangible solutions. This process will require engagement from internal BC Ferries teams and the community. These efforts will follow a three-step process:

1. Internal workshops with BC Ferries staff – January/February
2. Workshops with key stakeholders – February/March
3. Community feedback (where appropriate) – March/April

Learn more about the ideas that are moving ahead, and the ideas that will not be considered at this time in the *Moving Ahead Together on the Sunshine Coast - Next Steps* document. This document is available in the Resources section of the project page at www.bcferryprojects.ca/aheadtogether.

We will continue to keep the community updated as we undertake our next steps. We will be coming back with additional communications and engagement over the coming months as we move from proposed ideas through to the development and implementation of tangible solutions.

Phase I Engagement Summary

We heard from almost 1,500 people through our Phase I engagement. People provided feedback on the challenges they felt were most pressing and on the near-term improvements to service they would like us to consider.

The community indicated six priority areas that the Project Working Group focused on as they developed potential ways to improve service in the near-term with the assets BC Ferries currently has:

1. Travel certainty for residents
2. Capacity/frequency of service
3. Travel certainty through reservations
4. Terminal infrastructure and operational improvements
5. Travel certainty for connecting travelers (e.g. those travelling through Earls Cove, Gambier-Keats etc.)
6. Travel certainty for medical travellers

A full report on Phase I engagement can be found in the Resources section of the project page at www.bcferryprojects.ca/aheadtogether.

Project Working Group

The Project Working Group was also assembled in Phase I to work alongside BC Ferries in reviewing community feedback and developing ideas to improve ferry travel on the Sunshine Coast. The Project Working Group was comprised of 19 members that represented a cross-section of the community, ferry users and BC Ferries employees, including:

- Residents (full and part-time)
- Medical travellers
- Commercial trucking & hauling
- Tourism
- Local businesses and service providers
- Local economic development
- Schools and sports teams
- Parents
- Transit users
- Connecting travellers
- Upper and Lower Sunshine Coast Ferry Advisory Committees
- Gambier-Keats Ferry Advisory Committee
- Terminal operations at Langdale and Horseshoe Bay
- Deck operations on the Queen of Surrey
- Catering operations on the Queen of Surrey

The Group met four times through the first phase of engagement to develop and evaluate a list of potential solutions and to arrive at a short-list of solutions we sought community feedback on in Phase II.

Phase II Engagement Summary

In Phase II of engagement, we proposed 11 ideas for improving ferry travel on the Sunshine Coast in the near term, using the assets BC Ferries currently has. We asked the community to tell us which of these 11 ideas they would like to see developed further. The ideas were broken into four topic areas:

5. **Travel Certainty** - Ways to reduce stress and anxiety for those who depend on ferry service
6. **Medical Travel** - Ways to reduce stress and anxiety for those travelling with medical needs
7. **Communications** - Ways to enhance information that can make planning and travelling easier
8. **Demand Management** - Ways to enhance the use of available capacity through the day

The engagement results presented in this document were compiled from the feedback provided through Phase II engagement. In addition, two letters were submitted to the engagement team for consideration and have been included in Appendix A of this document.

The following events were part of Phase II engagement:

Engage. Opportunity	Date	Description	# of participants
Project Sounding Board Virtual Meeting	November 9, 2020	An opportunity for those who applied to participate in the Project Working Group to learn more about the ideas being proposed, ask questions and provide feedback.	<ul style="list-style-type: none"> • 70 invited • 21 RSVP'd • 10 attended
Online engagement	November 18 to December 9, 2020	The list of 11 proposed ideas is posted online for community feedback.	<ul style="list-style-type: none"> • 1,600 visitors to the page • 276 participants in online engagement
Paper copies of engagement in community spaces	November 18 to December 9, 2020	Paper copies of the online engagement placed at Sechelt Public Library, Gibsons Public Market, Powell River Public Library, Stormaway Ferry.	<ul style="list-style-type: none"> • 9 paper copies from Sechelt/Gibsons
Virtual Community Meeting	November 25, 2020	An opportunity for community members to learn more about the ideas being proposed, ask questions and provide feedback.	<ul style="list-style-type: none"> • 58 RSVP'd • 22 attended
Virtual Community Meeting	November 30, 2020	An opportunity for community members to learn more about the ideas being proposed, ask questions and provide feedback.	<ul style="list-style-type: none"> • 15 RSVP'd • 8 attended

Engagement Results

Travel Certainty

Through this engagement effort, three ideas were proposed to help increase certainty that travellers will make the sailing they need, including:

1. Modifying the way we handle reservations to better meet the needs of Sunshine Coast residents
2. Supporting last minute travel by staggering the release of reservations
3. Piloting ways to make it easier for those taking more than one ferry

What we heard: Participants felt all three ideas are worth developing further.

Our next step: In early 2021 we will hold workshops with internal and external stakeholders that focus on developing tangible solutions that we can put forward for community feedback. These solutions will seek to address the themes and considerations offered by the community and the Project Working Group about travel certainty.

Feedback on travel certainty will be addressed through the following conversations:

1. Improving travel certainty and reservations for the Sunshine Coast
2. Improving the travel experience for those taking more than one ferry

Learn more about these conversations in the *Moving Ahead Together on the Sunshine Coast - Next Steps* document. This document is available in the Resources section of the project page at www.bcferryprojects.ca/aheadtogether.

Idea 1: Modifying the way we handle reservations to better meet the needs of Sunshine Coast residents.

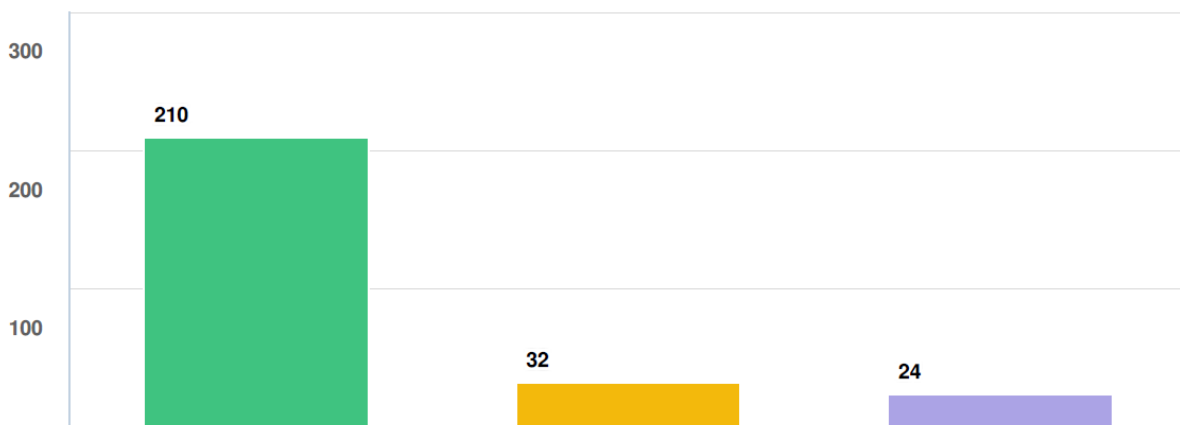
What this could look like: Our recently upgraded reservation management system could allow us to adjust reservations to better serve the needs of Sunshine Coast residents. We could explore a combination of options and the Project Working Group has the opportunity to be involved in workshops that can help us define how these modifications could look.

These options could include:

- Allocating more reservation space to non-commuting times, freeing up space on sailings that experience more drive-up traffic
- Exploring how free reservations could be implemented to encourage greater use
- Allowing last minute reservations and reducing the arrival window for reservations
- Opening block reservations that would allow commuters and regular travelers to make recurring bookings on the same sailings over multiple days
- Implementing a no-show fee to discourage “just-in-case” reservation bookings

What we heard about this idea:

Q1 Is modifying the way we handle reservations to better meet the needs of Sunshine Coast residents an idea worth pursuing?



Question options

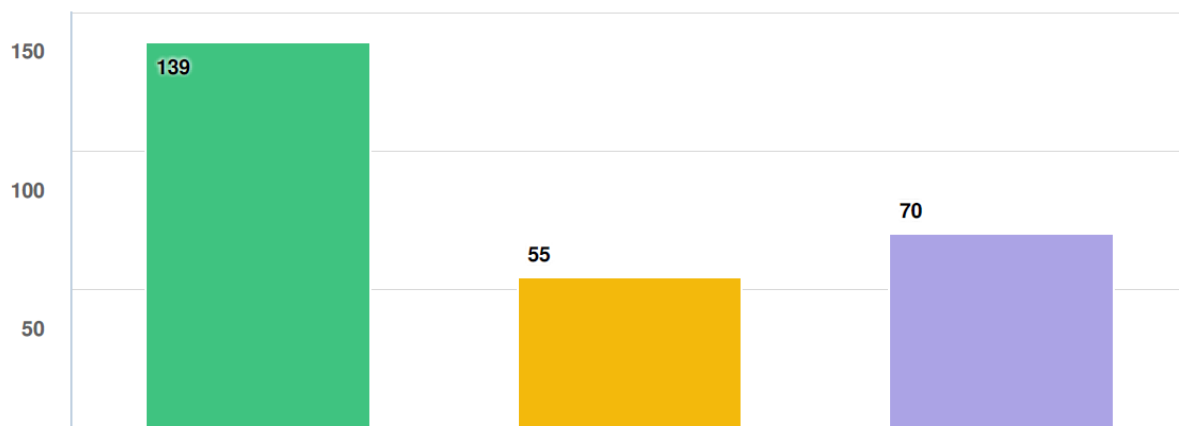
- Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Idea 2: Supporting last minute travel by staggering the release of reservations.

What this could look like: We could release a final block of reservations 24-48 hours before a sailing so that those with last minute travel plans can still access reservations. This option could be combined with the options listed in the previous solution.

What we heard about this idea:

Q2 Is supporting last minute travel by staggering the release of reservations an idea worth pursuing?



Question options

- Yes, this idea is worth exploring further.
- I don't know how I feel about this idea.
- No, leave this idea out.

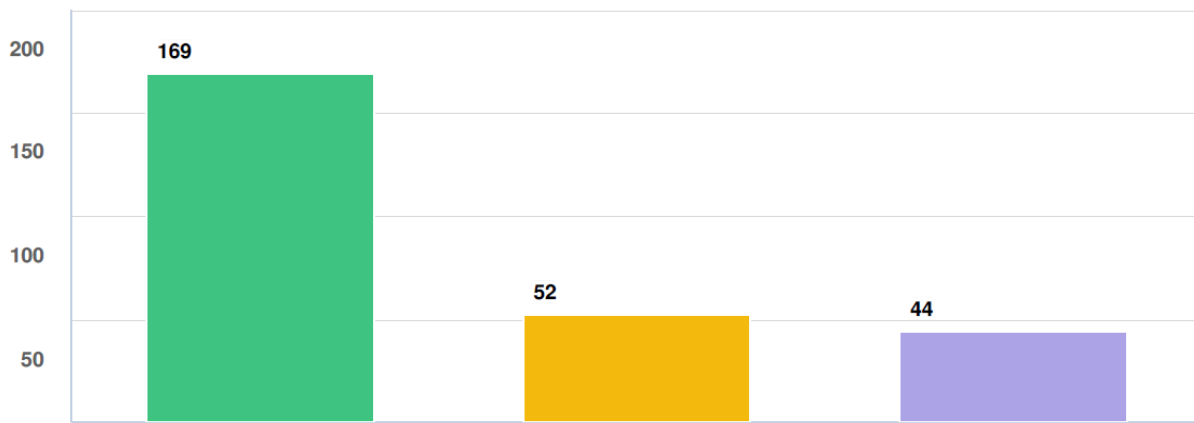
Idea 3: Piloting ways to make travel easier for those taking more than one ferry

What this could look like: There are a few ways we could try to make travel easier for those who use the Horseshoe Bay – Langdale route as part of a longer journey, for example those travelling from Powell River or Gambier-Keats. We could explore piloting methods like:

- Staging travellers who are carrying on to Langdale near the front of the vessel for faster on and off-loading
- Providing a shorter reservation arrival window for those arriving to the Langdale terminal from other routes
- Providing access to ‘express’ baggage service so travellers can walk on at Langdale and have a way of getting their purchases back with them easily and quickly

What we heard about this idea:

Q3 Is piloting ways to make travel easier for those taking more than one ferry an idea worth pursuing?



Question options

- Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Additional Travel Certainty Considerations

In addition to weighing in on the ideas proposed, participants also noted the following considerations around travel certainty:

Thoughts to consider when exploring modifications to the reservation system:

- **Ensure modifications provide benefit to all travellers, including:**
 - Upper and Lower Sunshine Coast residents
 - Commuters and frequent travellers
 - Medical travellers
 - Those for whom the additional cost of reservations is a challenge
- **Consider modifications to reservation process:**
 - Make reservations free and implement 'no show' fee, e.g. reservation fee applied to cost of fare when you arrive at the ticket booth.
 - Vary reservation prices based on time of booking, e.g. booking further out = less expensive reservation, last minute bookings = more expensive reservation; we also heard the opposite, i.e. booking further out = more expensive reservations, last minute bookings = less expensive/free reservation
 - When sailings are delayed, tie the 30 minute cut-off to claim reservations to the actual sailing time rather than the scheduled time
- **Consider modifications to reservation allocations:**
 - Make space onboard 100% reservable; we also heard the opposite: get rid of reservations altogether and go to first-come, first-serve only
 - Ensure reservable space provides adequate room to accommodate commuters, medical travellers, last-minute travellers and those travelling from the Upper Sunshine Coast who have less certain travel times
 - Use reservation allocations to help spread demand over the day

Thoughts to consider when looking to improve travel for those taking more than one ferry:

- **Consider operational adjustments:**
 - Hold Earls Cove ferry if ferry from Horseshoe Bay – Langdale is delayed
 - Provide priority access on Langdale – Horseshoe Bay ferry for those travelling from Powell River
- **Consider making reservation and scheduling adjustments:**
 - Introduce reservations on the Earls Cove – Saltery Bay route
 - Provide linked reservations for those travelling from Upper Sunshine Coast to Mainland
 - Adjust schedules to create easier connecting travel between Upper Sunshine Coast and Mainland

Medical Travel

Through this engagement effort, four ideas were proposed to help reduce stress and anxiety for medical travellers:

1. Create a reservation process that would provide access to reservation capacity set aside for travellers using the Travel Assistance Program
2. Create a reservation process that would provide access to capacity set aside for travellers requiring Medical Assured Loading
3. Enhancing the information available about the TAP and MAL programs, as well as information that helps in planning travel for those with mobility challenges
4. Create a system that makes it easier for those travelling for medical reasons, or with specific mobility needs to be placed in an accessible spot on the ferry

What we heard: Participants felt all four ideas are worth developing further.

Our next step: In early 2021 we will hold workshops with internal and external stakeholders that focus on developing tangible solutions that we can put forward for community feedback. These solutions will seek to address the themes and considerations offered by the community and the Project Working Group about medical travel.

Feedback on medical travel will be addressed through the following conversations:

1. Improving travel certainty and reservations for the Sunshine Coast
2. Operational changes to improve the medical travel experience
3. Enhancing communications to make planning and travelling easier

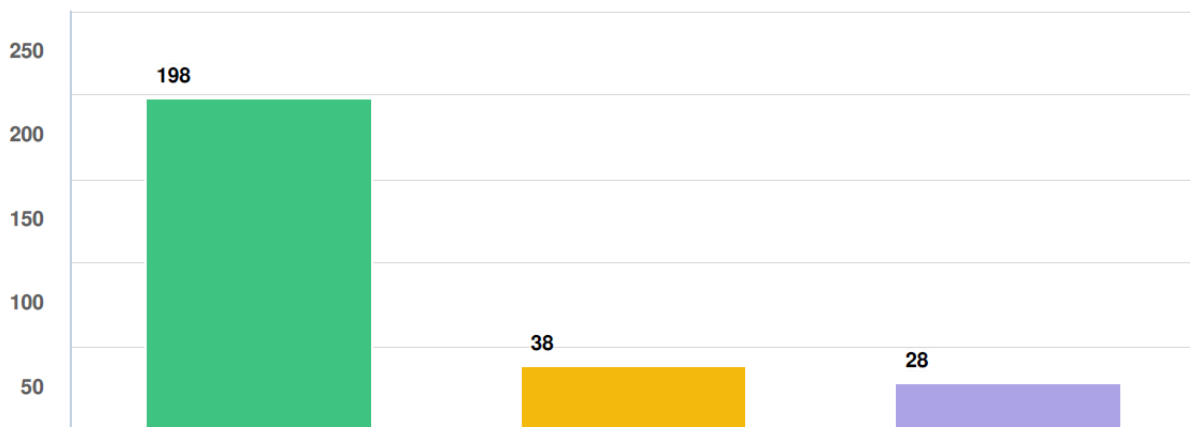
Learn more about these conversations in the *Moving Ahead Together on the Sunshine Coast - Next Steps* document. This document is available in the Resources section of the project page at www.bcferrysprojects.ca/aheadtogether.

Idea 1: Create a reservation process that would provide access to reservation capacity set aside for travellers using the Travel Assistance Program.

What this could look like: This idea could include finding ways to allow TAP form holders to reserve space specifically set aside for TAP travellers on different sailings. This capacity would likely be a set inventory that could sell out.

What we heard about this idea:

Q4 Is creating a reservation process to provide access to reservation capacity set aside for TAP travellers an idea worth purs...



Question options

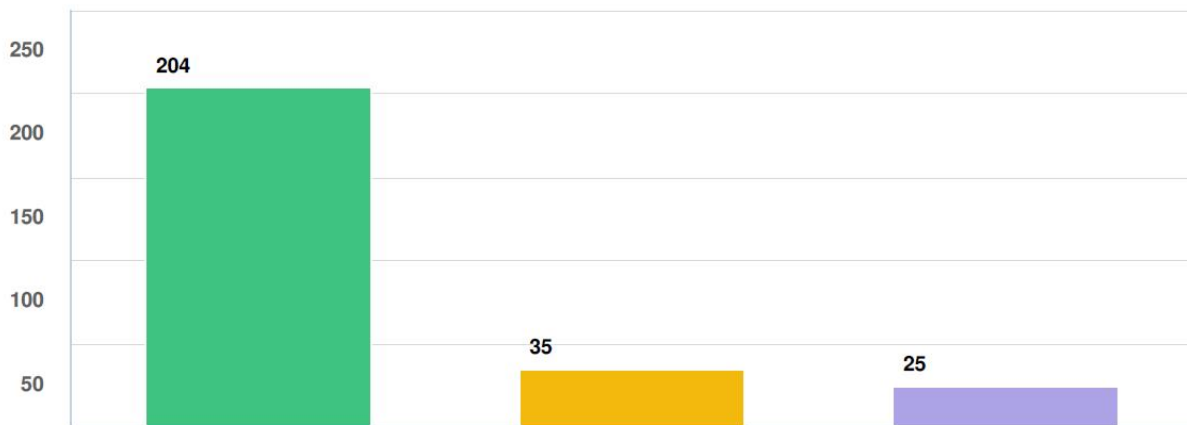
● Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Idea 2: Create a reservation process that would provide access to capacity set aside for travellers requiring Medical Assured Loading.

What this could look like: This idea could include finding ways to allow MAL letter holders to reserve space specifically set aside for those with medical assured loading needs. This capacity would likely be a set inventory that could sell out.

What we heard about this idea:

Q5 Is creating a reservation process to provide access to reservation capacity set aside for MAL travellers an idea worth purs...



Question options

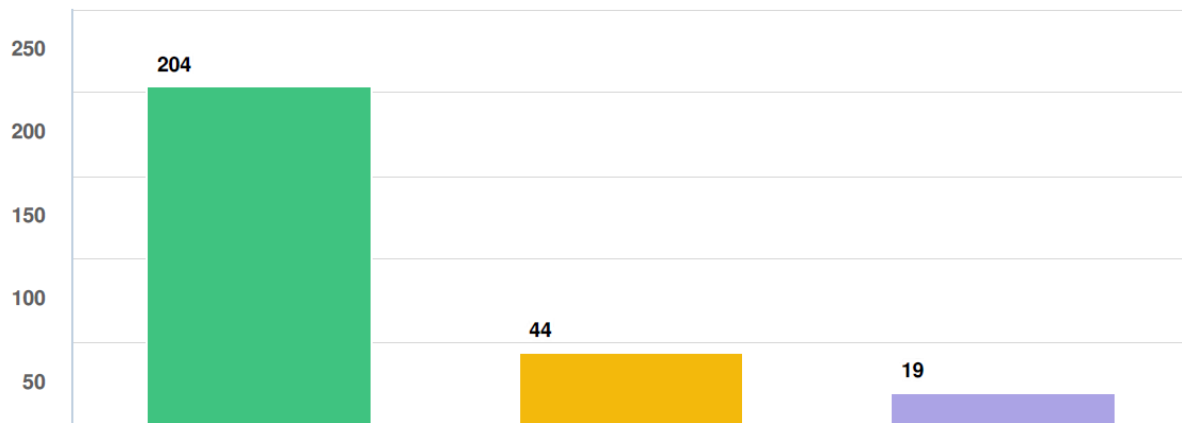
☒ Yes, this idea is worth exploring further.
 ☐ I don't know how I feel about this idea.
 ☐ No, leave this idea out.

Idea 3: Enhancing information about the TAP and MAL programs, as well as information on how to plan when travelling with mobility challenges.

What this could look like: This idea means taking a look at how and where we're providing information on these programs now, and where we could make information easier to access. We could also consult with users to better understand what information is needed that isn't there today and how we can enhance the flow of communication about the TAP and MAL programs with users and physicians.

What we heard about this idea:

Q6 Is enhancing information about the TAP and MAL programs, and how to plan when travelling with mobility challenges an idea w...



Question options

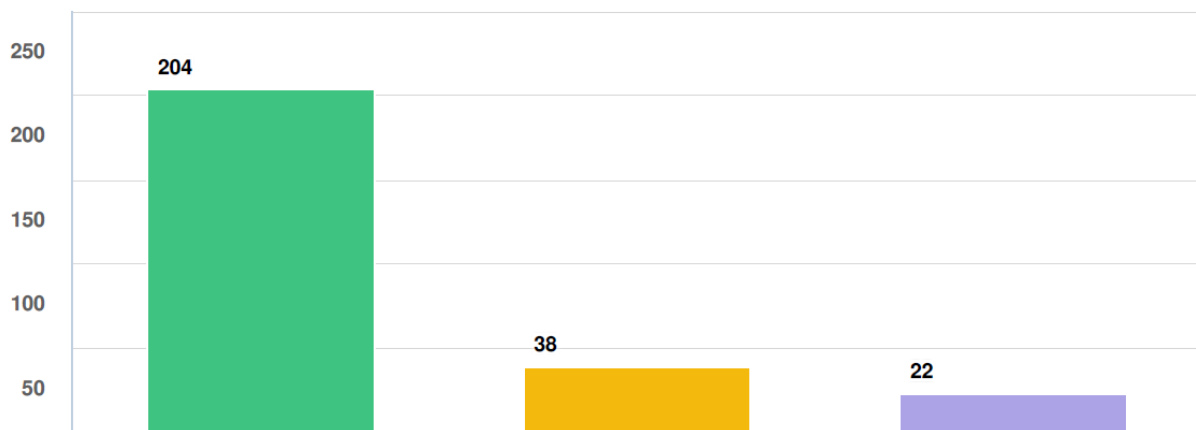
● Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Idea 4: Create a system that makes it easier for those travelling for medical reasons, or with specific mobility needs to be placed in an accessible spot on the ferry.

What this could look like: Although our deck crew does their best to place those with mobility needs in an accessible location on the ferry, there may be opportunity to make this process more effective for everyone. One way this could look would be to implement a system that allows crew to quickly identify specific accessibility needs. For example, a slip on the dashboard that means close to an elevator, extra space to load/unload a mobility aid etc.

What we heard about this idea:

Q7 Is creating a system to make it easier to be placed in an accessible spot on the ferry an idea worth pursuing?



Question options

● Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Additional Medical Travel Considerations

In addition to weighing in on the ideas proposed, participants also noted the following considerations around medical travel:

- **Consider operational adjustments that prioritize medical travellers and could make medical travel easier:**
 - Help ensure placement on top deck and near elevators when needed (*Note: Transport Canada permits passengers to remain on the lower vehicle deck on the Langdale – Horseshoe Bay route*)
 - Improve access to mobility aids and assistance for those who are walking on
 - Find ways to expedite medical travellers to the front of the line at the ticket booth to avoid long waits outside of terminals
- **Enhance processes to better support medical travellers:**
 - Make reservations free and easily accessible to those with TAP and/or MAL forms
 - Find ways to account for the last-minute nature of medical travel outside of the reservation system, e.g. appointments often run late or open up with short notice and these eventualities should be woven into the process to reduce stress for travellers
- **Enhance communications around medical travel:**
 - Ensure consistent and compassionate information and directions are provided to customers when arriving at the terminal regarding priority placement, requirements for TAP/MAL travel etc.
 - Ensure consistent understanding of TAP and MAL programs by physicians' offices that service the Sunshine Coast

Communications

Through this engagement effort, three ideas were proposed to help customers make informed travel choices:

1. Enhancing information that helps customers plan their travel
2. Enhancing information that helps customers on the day-of travel
3. Creating a mobile app

What we heard: Participants felt all three ideas are worth developing further.

Our next step: In early 2021 we will hold workshops with internal and external stakeholders that focus on developing tangible solutions that we can put forward for community feedback. These solutions will seek to address the themes and considerations offered by the community and the Project Working Group about communications.

Feedback on communications will be touched on in all future conversations, but will be specifically addressed through the following conversation:

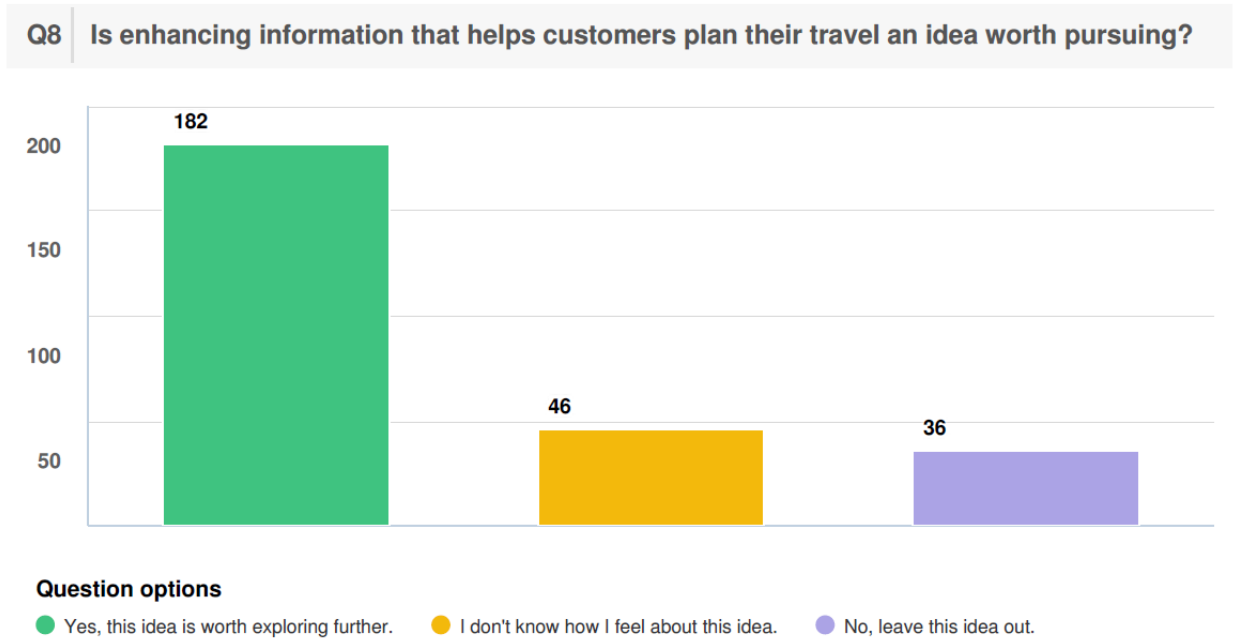
1. Enhancing communications to make planning and travelling easier

Learn more about these conversations in the *Moving Ahead Together on the Sunshine Coast - Next Steps* document. This document is available in the Resources section of the project page at www.bcferryprojects.ca/aheadtogether.

Idea 1: Enhancing information that helps customers plan their travel.

What this could look like: We could investigate providing ‘heat maps’ that show average busiest sailing times based on historical traffic trends. This information could help people plan their travel around typically less busy times. There are a variety of ways we could reimagine future and current conditions information, and further engagement on this topic would be valuable.

What we heard about this idea:

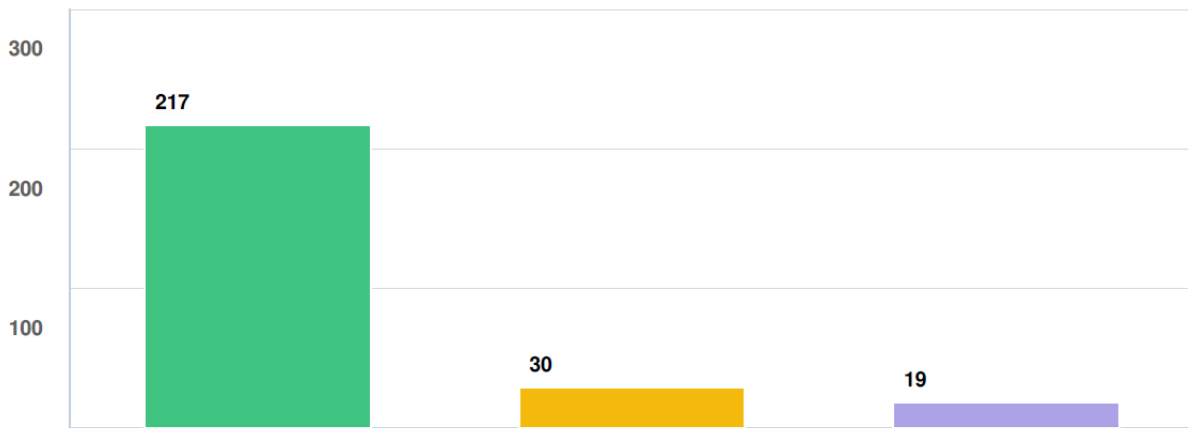


Idea 2: Enhancing information that helps customers on the day-of travel.

What this could look like: We could explore ways to improve our real-time information flow to make it easier for people to know what is happening at the terminal before they arrive, and while waiting at the terminal or ticket booth. This could include things such as shifting webcam views, finding better ways to let customers know what to expect while waiting outside the ticket booth, making it easier to learn about sailing conditions etc.

What we heard about this idea:

Q9 Is enhancing information that helps customers on the day-of travel an idea worth pursuing?



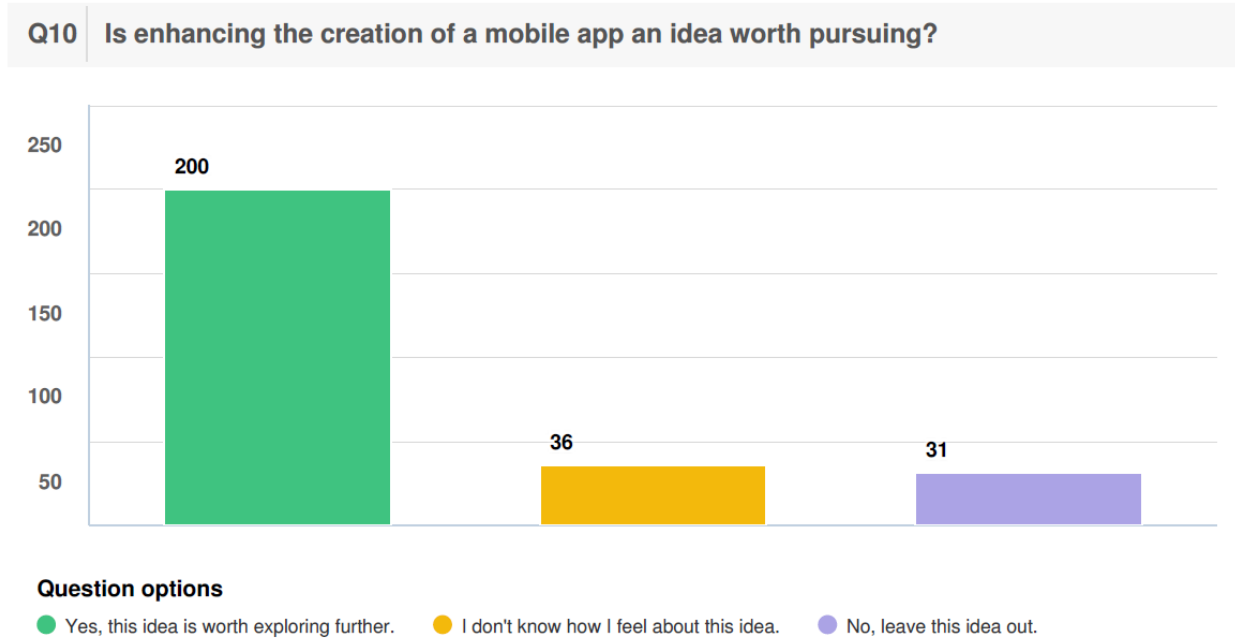
Question options

● Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Idea 3: Creating a mobile app

What this could look like: BC Ferries is working on the creation of a mobile app that will allow customers to set their preferences and provide easier access to the information they most need and want. The Project Working Group has an opportunity to be further involved in the development of this app through focus group sessions and workshops to help define app requirements and functionality.

What we heard about this idea:



Additional Communications Considerations

In addition to weighing in on the ideas proposed, participants also noted the following considerations around communications:

- **Provide information that will help customers make informed decisions about their travel:**
 - Suggest the best sailings to reserve based on the percentage of reservations still available for each sailing time
 - Develop communication flows that actively push customers to typically less busy times, e.g. avoid/encourage messaging
- **Provide information that will reduce anxiety for travellers while en route:**
 - Make it easy for travellers to know about the traffic conditions outside of the ticket booth before the arrive
 - Enhance the flow of communications at the terminal to help customers understand how traffic is being loaded onto the vessel, e.g. provide transparency in operations so customers feel confident first-come, first-served is being followed in coordination with reservations
- **Work with other transportation providers to improve service connections,** e.g. BC Transit, Translink, and regional government transportation planning bodies.

Managing Demand

Through this engagement effort, we proposed the following idea to help move traffic away from key travel times, freeing up space for commuters, commercial traffic and medical travellers

1. Encouraging use of capacity over the day for those who have flexibility in their travel plans through lower bookable fares and other incentives for using less-busy sailings

What we heard: Participants felt this idea was worth developing further.

Our next step: Lower bookable fares on less-busy sailings will be introduced to our major routes between Metro Vancouver and Vancouver Island in 2021. This same fare structure will be rolled out to other routes once it has been piloted and established on our major routes.

Feedback on managing demand through communications will be specifically addressed through the following conversation:

1. Enhancing communications to make planning and travelling easier

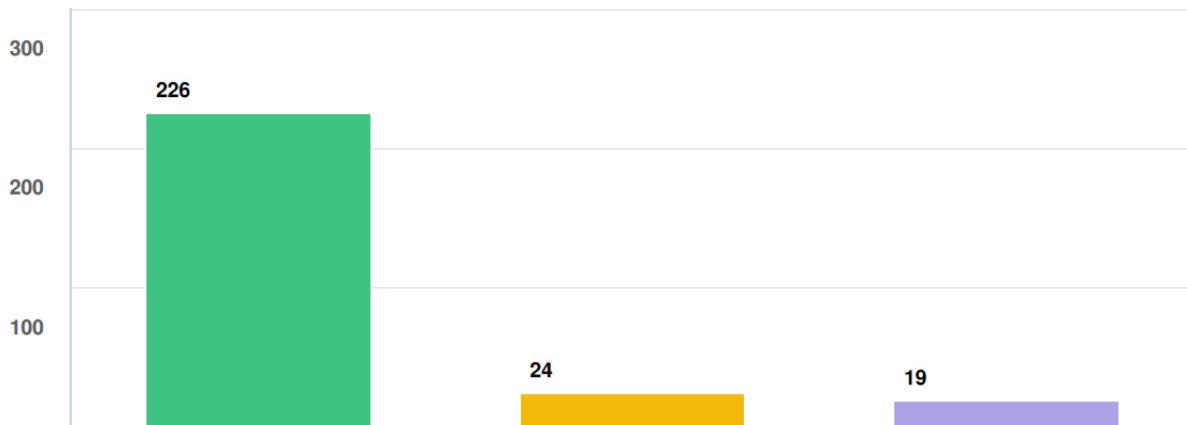
Learn more about these conversations in the *Moving Ahead Together on the Sunshine Coast - Next Steps* document. This document is available in the Resources section of the project page at www.bcferryprojects.ca/aheadtogether.

Idea 1: Encouraging use of capacity over the day

What this could look like: This could look like finding ways to make mid-day travel more enticing for those who can be flexible with their travel times, for example offering lower, bookable fares on sailings that are typically less popular.

What we heard about this idea:

Q11 Is encouraging use of capacity over the day an idea worth exploring?



Question options

● Yes, this idea is worth exploring further.
 ● I don't know how I feel about this idea.
 ● No, leave this idea out.

Additional Demand Management Considerations

In addition to weighing in on the ideas proposed, participants also noted the following considerations around managing demand:

- **Using communications to help manage demand by:**
 - Promoting travel by foot, e.g. foot passenger capacity rarely sells out
 - Connecting with community organizations e.g. tourism industry to help encourage use of less-busy sailings by those who have flexibility in their travel plans
- **Use fare structures to encourage use of less-busy sailings:**
 - Offer mid-day sailings and foot passenger fares at discounted rates
 - Reduce cost of parking at terminals
 - Allow pre-purchase of tickets online and have pre-purchased customers go to separate line at the ticket booth for faster processing
- **Work with other transportation organizations to support bus travel between Upper and Lower Sunshine Coast** to encourage walk-on travel for Upper Sunshine Coast residents
- **Consider changes to fleet deployment:**
 - Make additional L-runs to utilize sailings out of Departure Bay to also service Sunshine Coast
 - Consider triangulating runs, e.g. Departure Bay – Langdale – HSB
 - Share vessels between routes, e.g. a vessel to support additional service for both Bowen Island and Langdale
- **Consider changes to the schedule:**
 - Create an additional early morning sailing from Langdale to support commuters and commercial traffic
 - Extend peak season schedules longer
 - Add sailings to the peak season schedule where possible
 - Add sailings between Langdale and Vancouver Island
 - Restart the Texada – Comox direct route pilot

Appendix A - Stakeholder Letters

Sunshine Coast

Tourism Growth Management Advisory Committee

Submission to BC Ferries Moving Ahead Together on the Sunshine Coast

December 22, 2020



December 22, 2020

To Brian Anderson, VP, Strategy and Engagement, BC Ferries

Regarding: BC Ferries Moving Ahead Together on the Sunshine Coast

The Sunshine Coast Tourism Growth Management Advisory Committee (Advisory Committee) has come together to help manage tourism growth on the Sunshine Coast, ensuring positive visitor experiences are balanced with community capacity and protection of cultural and natural places.

The Advisory Committee has established an approach to monitor and manage visitor volumes based on available capacity, in particular during peak times. Through this process, we are tracking down and finding data that shows what the real capacity limits are and looking to manage within them or identify actions to sustainably increase the capacity limits to support community and business success.

Our action plan identifies 12 different capacity indicators, of which BC Ferries capacity has been identified as the most important indicator for tourism growth management. With impacts of COVID-19 resulting in a significant reduction in ferry capacity, particularly on Route 3 from Horseshoe Bay to Langdale, we consider actions needed to improve the ferry capacity as critical.

Capacity	Sentiment	Environmental/ Cultural	Enabling
Ferries	Visitor Sentiment	Environmental Sensitivities	Funding
Transportation	Resident Sentiment	Cultural Sensitivities	Government Support & Policies
Accommodation	Industry Sentiment		
Staff & Housing			
Water			

This document provides our recommendations to BC Ferries for the Moving Ahead Together on the Sunshine Coast project, as well as for Safe Restart Funding and other Coastal Ferry Services decisions. We recognize that BC Ferries takes a whole system view, and that the Sunshine Coast represents a portion of the 47 ports of call and millions of passengers each year. Like other coastal communities, ferry transportation is the lifeline that keeps the Sunshine Coast livable. Thank you for the opportunity to submit this document and for your thoughtful engagement during this process.

Industry Overview

The Sunshine Coast is a premier BC destination that has seen a tremendous period of growth and success. This success has come from a decade of hard work in bringing the tourism industry together, instituting the collection of MRDT funds, initiating strong marketing programs, working collaboratively with other partners in the tourism ecosystem as well as the community at large (including First Nations, municipalities and regional districts), completing a destination development strategy, elevating the skillsets of tourism businesses, and attracting investment, among others.

Awareness of the region as a premier travel destination increased with enhanced marketing efforts and from the voices of the travel media, influencers, residents and visitors who travelled to and within the Coast and were compelled to share their memorable experiences with others.

Room revenues rose by over 31% from 2015-2019, with annual growth averaging over 6% year over year. And most importantly, growth was occurring even faster (12%) in the shoulder-season months (October-April). The goal of becoming a year-round tourism destination was taking hold. BC Ferries ridership in the region also grew to its highest levels in over 20 years.

The destination also received a strong Tourism Sentiment Index (TSI) score of 52 (54% promoters; only 2% detractors), which is in the high range for the Sunshine Coast's competitive set of small coastal and outdoor oriented communities.

By early spring of 2020, all signs were pointing toward another record season of tourism business on the Sunshine Coast.

Tourism plays a significant role in the Sunshine Coast economy, and based on the national average, supports approximately 1 in 10 jobs.¹ Tourism is a powerhouse industry, enhancing lifestyle and culture and improving quality of life. Recreation sites, arts and culture, attractions, parks, restaurants, resorts and events wouldn't flourish without tourism.² Supporting tourism growth on the Coast supports all people on the Coast.

Tourism by definition includes those that travel over 40km (80km roundtrip) for a day trip or overnight stay. By this description, tourism includes those travelling on ferries to visit friends/family, business, tourism, sports, clubs and other leisure activities, and shopping (note these are BC Ferries categories from engagement survey).

Sunshine Coast Specific COVID-19 Impacts & Future Demand

COVID-19 has resulted in significant and substantive impacts on people's desire and ability to travel. The immediate impacts can be seen from the current estimates of room revenues for the Sunshine Coast, projected to end 2020 52% lower than 2019.³

As access to the region is highly dependent on BC Ferries future, rebound scenarios are centred on how quickly BC Ferries resumes sailings and increases capacity levels. The benefits of tourism to the entire Sunshine Coast area—businesses, residents and communities— is therefore aligned with BC Ferries traffic volumes.

COVID-19 Impacts to the Sunshine Coast⁴:

- 50% decline in BC Ferries passenger traffic and a 36% decline in vehicle traffic in the first six months of 2020 compared to the previous year for the main Horseshoe Bay to Langdale ferry route. This decline is anticipated to hold through Q3 and potentially through Q4.

¹ [Tourism by the Numbers](#), Tourism Industry Association of BC

² [The Power of Tourism](#), Destination BC

³ [Sunshine Coast Tourism Strategic Plan 2021-2026](#)

⁴ Ibid

- Given that traffic on this route is the primary way to access the area and had been relatively constant for the previous five years with average annual increases, the reduction in ferry sailings and capacity has had a substantive impact on tourism in the area. Furthermore, without a return to previous sailing frequencies and capacities, the Sunshine Coast is unlikely to see the number of travellers return to pre-COVID-19 levels.
- A decline of 63% in year over year lodging revenues for the first five months of 2020.
- Tourism Sentiment Index (TSI) score of +29 is a decline but remains positive.
 - TSI for March-May 2020 was +24. The topics driving negative sentiment included beaches and ground transportation. Ground transportation included ferries service and was a negative -11 score.
 - TSI for June-August 2020 was +33. The topics driving negative sentiment included cycling and fishing. Ground transportation improved significantly.
- As of August 1, there was a 15% increase in uses of #sunshinecoastbc and a 20% increase in Instagram followers.
- Decrease of approximately 60% in July-August visitor traffic at the Powell River, Gibsons and Sechelt Visitor Information Centres over the same period last year.

Alignment

The Recommendations from the Advisory Council in the following section are in alignment with the [*Sunshine Coast Tourism 5 Year Strategic Business Plan 2021-2026*](#):

- Manage tourism growth on the Sunshine Coast in a manner that ensures positive visitor experiences are balanced with community capacity and protection of natural places, and aligned with philosophies of Indigenous stewardship of the land.
- Work with the provincial government and industry partners to influence BC Ferries to increase the frequency and volume of sailings from the Lower Mainland to Langdale.

The Recommendations from the Advisory Council in the following section are in alignment with the [*Sunshine Coast Destination Development Strategy*](#) that was developed by Destination BC in partnership with Indigenous Tourism BC, the Ministry of Tourism, Arts & Culture and over 100 stakeholders from the Sunshine Coast.

- Work as a coordinated, regional base to advocate for better fundamental BC Ferries service, including reliable service, improved frequency, increased capacity, and fair costs.
- Improve relations and collaboration with BC Ferries and the Sunshine Coast tourism industry, as represented by Sunshine Coast Tourism.
- Work with BC Ferries to change the policy to extend the sailings of two boats on the Horseshoe Bay to Langdale route earlier in June and later in September.
- Enhance the BC Ferries experience to balance the needs of residents with ferry capacity utilized by tourism growth.
- Manage tourism growth on the Sunshine Coast, ensuring positive visitor experiences are balanced with community capacity and protection of natural places.

The Recommendations from the Advisory Council in the following section are in alignment with the Province's recent coastal ferries visioning engagement as noted in the September 17, 2020 [press release](#) and [Phase Two Engagement of Summary of Feedback](#) report:

- The key themes indicated that coastal ferry services should:
 - support efficient end-to-end travel of people and goods;
 - be equitable and accessible;
 - mitigate and be responsive to climate change; and
 - reflect the values of coastal communities.
- Many respondents would like to see new, faster, and more direct routes as well as terminals in more accessible locations.
- Respondents expressed concerns around scheduling and reliability.
- People expressed an interest in travelling without a personal vehicle if there were improvements, such as better parking at terminals or improved connectivity to other travel modes like public transit, taxi, ride hailing or cycling, or dedicated passenger-only ferry services in more accessible locations.
- UBCM membership submission included a desire for greater local government engagement in long-term strategic planning for the ferry service, better integration with other modes of transportation, improvements to services including new foot-passenger ferry service, support for investments in infrastructure such as new ships as well as green technologies to reduce emissions.
- Phase Two Engagement Survey results:
 - Tourism accounts for approximately 65% of primary reasons for travel; includes those travelling on ferries to visit friends/family (42%), tourism (9%), sports, clubs and other leisure activities (8%), and shopping (6%).
 - 28% of respondents stated the ferry service meets their need poorly or very poorly. Scheduling (18%) and overloads (14%) were the second and third areas identified for improvement, after affordability (39%). Additional comments included: "Scheduling and reliability: Respondents wanted hours of service adjusted to accommodate more ferry users."
 - For those who answered yes to ferry service providing an impediment to the well-being of their community, the survey asked them to pick the one thing that presents the biggest barrier. Similar to the most needed improvements question, the top answer was fares (almost 41%). Overloads and schedule followed with over 20% and 19% respectively. Additional comments included: "Schedule: Respondents wanted hours of service adjusted to accommodate more ferry users and felt that wait times were presenting barriers to economic well-being. Overloads: Overly congested ferries during high capacity times cause economic barriers."

The Recommendations from the Advisory Council in the following section are in alignment with the recent Safe Restart [BC Ferries Contribution Agreement](#) between the province of BC and BC Ferries as released December 4, 2020:

- BC Ferries will provide reliable and affordable Core Service Levels and Discretionary Sailings.

- BC Ferries will maintain service levels that exceed forecasted traffic demand on all routes, with a target of 20% on routes where reasonable and achievable.
- BC Ferries will continually monitor service levels and traffic forecasts. In the event that additional services, over and above the Core Service Levels and Discretionary Sailings, are required to meet growing demand, BC Ferries will make commercially reasonable efforts to deploy available vessels and crew to increase service levels.
- BC Ferries will continue to...ensure that ferry services remain safe and efficient and that opportunities are commercially reasonably pursued to increase traffic/ridership and capacity across all of BC Ferries' routes during pandemic recovery.

Recommendations

The Sunshine Coast Tourism Growth Management Advisory Committee recommends the following:

Moving Ahead Together on the Sunshine Coast

1. BC Ferries to implement initiatives to increase capacity on the Sunshine Coast to 2019 levels for the 2021 season.
2. BC Ferries to work closely with the tourism industry and partners on the Sunshine Coast to identify how the tourism sector can help encourage travel on off-peak sailings (times of the day, week and year), which will in turn increase capacity during peak times. This could include providing information that will enable them to help shift travel decisions to where more capacity exists. (Example may be key messaging by week or month, links to information, etc.)
3. BC Ferries to improve promotion of off-peak time travel to visitors through communications in messaging, pricing and/or other mechanisms.
4. BC Ferries to identify opportunities within the technology and reservation systems that will promote (push) options for travel on off-peak times where more capacity exists.
5. BC Ferries to provide easy access and better information to visitors that enables them to see capacity trends and makes decisions that help shift travel decisions to where more capacity exists. (Examples include heat maps, typical busy times, reservation availability, congestion, delays, bringing back schedule change dates and PDF schedules, etc.)
6. BC Ferries to work with transportation providers and entrepreneurs to develop plans that better enables positive experiences with walk on passengers being able to have reliable, easy to secure transportation services from the ferry terminal, which may include new or expanded car rentals, bicycle rentals, car coops and shuttles that augment public transit.
7. BC Ferries to ensure that while decisions are being made for the betterment of Sunshine Coast residents, that the value of tourism in supporting those residents remains top of mind and visitors needs are fairly considered, too.
8. BC Ferries to leverage their marketing and promotional reach to support tourism businesses on the Coast that have been impacted by loss of ferry traffic and on-board/in terminal marketing opportunities such as BC Ferries Vacation packages and brochure racking.

Safe Restart Funding

9. Ensure Route 3, Route 7 and Route 17 are provided every possible opportunity to benefit from the \$308M Safe Restart funding to be allocated to Sunshine Coast.
10. With the improved financial position of BC Ferries due to the \$308M Safe Restart funding, proceed as best as possible to move ahead capital projects that improve short term and long term capacity challenges, including proceeding with the Langdale terminal upgrade, Horseshoe Bay terminal upgrades that support increased capacity for the Sunshine Coast, and adding a second vessel to Route 3 as quickly as possible.

Coastal Ferry Services contract with provincial government

11. Prioritize generating government support for long term decisions for two ferries on Route 3, which requires capital investment and a change in the Coastal Ferry Services contract with the provincial government.
12. Determine what conditions would be required to extend the sailing season and work with the tourism industry to collect information demonstrating those conditions have been met.
13. Develop the business case for extended sailings of two boats on the Horseshoe Bay to Langdale route, ensuring they reasonably connect to the Earls Cove ferry.
14. Work collaboratively with BC Ferries to review annually and determine feasibility to extend the sailing season further each year, as warranted by consumer demand and supported by destination development and marketing activities.

Closing Comments

On behalf of the tourism industry on the Sunshine Coast, we thank you for reviewing and considering our submission and the work you are doing to support communities and residents on the Sunshine Coast. We look forward to working with you to help the tourism and hospitality industry recover and once again provide the benefits that help improve the quality of life for everyone on the Coast. Please reach out and call or email if you have any questions or would like additional information.

Best Regards,

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BC Ferries Route #3 Study

BC Ferries is undertaking a study on how to improve service on route #3, the route between Horseshoe Bay and Langdale (Southern Sunshine Coast) in the short term, without the expenditure of any new capital.

It should be recalled that when BC Ferry Services Inc. was formed in 2003, route #3 was assigned two larger vessels, the Queen of Surrey and the Queen of Esquimalt. Subsequently capacity was reduced when the Queen of Esquimalt was sold and not replaced. In the early stages of the Coastal Ferry Contract, demand for ferry services was reduced by fare increases that exceeded inflation by an average of 5% per year. It is remembered that David Hahn infamously stated that if he increased fares by 7% and demand decreased by 4%, BC Ferries was still ahead in revenue by 3%, and this would delay the need to add capacity.

Effectively it took from 2003 to 2019 for demand to recover, in spite of a significant growth in population on the Sunshine Coast due, to this pricing strategy.

The current approach is to manage peak demand by applying a premium in the form of a reservation charge for sailings at preferred times, rather than seeking a more effective use of existing assets. The effect of this strategy is to reduce wait times for those travelling that can afford reservations, and to materially increase revenue to BC Ferries, but not to increase capacity when customers need it.

While reservations and premium charges on preferred sailing times is a relatively easy and profitable fix for BC Ferries, as a solution it falls short in providing service at preferred times for more of the travelling public.

There is another way to fix the problem of limited capacity at preferred times. Let's look at Horseshoe Bay as the hub for three routes, Route

#2, between HSB to Departure Bay, Route #8, between HSB and Bowen Island and route #3.

Route #2 services customers with distinctly different needs from Route #3 & Route #8. Also, Route #2 customers have significant travel alternatives. Residents of Vancouver Island have access to robust medical and other professional and educational services and also have broad access to retail and other commercial services on the Island, limiting their need to take the ferry. Travellers from Nanaimo can travel on BC Ferries route #2 to HSB, or route #30 to Tsawwassen and Route #1 from Swartz Bay to Tsawwassen, or by scheduled float plane between Nanaimo and Vancouver and by commercial airlines from major airports in Nanaimo, Sidney, Comox, Campbell River and even Port Hardy and Tofino. BC Ferries stated plan is to make Route #2 an almost fully reserved route. Wait times between ferry sailings will not be as important given the travellers will be sailing almost exclusively with time specific reservations, reducing the need for sailings every two hours as long as total capacity is retained.

Travellers on Route #3 and #8 have limited alternatives to the ferries. There is modest scheduled float plane service between Sechelt and Vancouver and limited water taxi service available at a premium, weather permitting. Because of limited medical, professional and educational services and limited access to commercial and retail products, residents must travel much more frequently than those on Vancouver Island. In fact, residents of Bowen Island and the Southern Sunshine Coast use the ferry services by a factor of 15 to one on a per capita basis when compared to residents of Vancouver Island. Residents must rely on timely, frequent and reasonably priced ferry services for their travel, and for trucks bringing supplies to these destinations.

Today, each weekday morning, even with reservations, ferry capacity is below demand for oversize vehicles that deliver necessary products to the Sunshine Coast from HSB. During peak demand periods, wait times at HSB and Langdale can easily extend to 6 hours or more for the travelling public and commercial carriers due to lack of capacity. Charging a reservation fee does not increase capacity.

Suggested solution: Between route #2 and route #3, at least 3 large c-class vessels operate daily. In the peak season up to 5 large vessels operate on these routes.

On a limited basis, route #2 & #3 are already co-operating to increase timely capacity. Additional co-operation could alleviate the morning capacity crunch at HSB and Langdale by redirecting the first vessel in the morning from HSB on route #2 to Langdale. Other timely concentrations of demand during the day could also be addressed by sharing of vessels, which again would provide capacity when needed for route #3. In the end, focus would be on capacity at time of need with less capacity at other times. Also, in the future the Queen of Capilano could be replaced by a vessel with the capacity and speed of the Malaspina Sky to efficiently reduce the cost of service at off-peak times for Route #3, and provide extra timely capacity for route #8 when needed.

The objective of BC Ferries review should be how to provide better services to the communities it serves, rather than an excuse to justify additional charges to the detriment of the travelling public. Having the right capacity at the right times will eliminate a lot of the problems that this study is attempting to resolve.

dmd 6/12/20