



MUSTEL GROUP
MARKET RESEARCH

Coastal Ferries Public Opinion Poll

Community Engagement, Fall 2013

Presented to:

Kirk & Co. Consulting Ltd.

Vancouver, B.C.

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Executive Overview

Background and Objectives

As the BC Coastal Ferry service continues to operate in an environment of increasing costs and diminishing ridership, conditions that threaten the sustainability of the system, the Ministry of Transportation and Infrastructure has engaged coastal communities, ferry users and residents from across the province on strategies to ensure the long-term sustainability of the coastal ferry network. Following and building upon results from the BC Coastal Ferries Community Engagement held in the fall of 2012, the Province has initiated a new round of community engagement in the fall of 2013.

Community stakeholder meetings and public open houses were once again held in several communities throughout November and early December 2013. A feedback form was distributed at these meetings and made available online for any residents who wish to express their views regarding specific medium-term strategies. The engagement team also commissioned an online survey among a representative sample of B.C. residents randomly recruited by telephone.

Mustel Group was commissioned by Kirk & Co. Consulting Ltd. to assist with randomly recruiting the representative sample of British Columbia residents, programming and hosting the online feedback form, and to process and report upon the data contained in the feedback forms. The feedback form asked respondents to rank or to rate various proposals and provide comments, ideas and opinions to be considered. Following are those results.

Methodology

During the months of November and December 2013 Mustel Group conducted a computer assisted telephone interview (Cati) screening survey in order to recruit a representative sample of British Columbia residents to complete an online feedback form regarding various medium-term strategies designed to address the ongoing challenges to the ferry service. Based on an estimated 50% completion rate approximately 1,000 respondents were recruited from which a total of 529 went on to complete an online survey.

All telephone recruitment was conducted from Mustel Group's Vancouver-based call centre employing industry-standard randomization techniques and including both landlines and cell numbers in order to achieve a representative sample of the population. Each recruited participant provided a contact email address and was sent an electronic invitation to complete a survey. Each invitation contained a unique survey link allowing the participant to complete the survey just once. The unique link also allowed for reminder emails to be sent only to those who had not yet completed a survey.

The online feedback form was programmed and hosted by Mustel Group with all data securely stored on servers within Canada.

At the data processing stage minor weighting adjustments were applied to ensure the final sample is proportionally representative of the population of British Columbia according to age, gender and region matching Statistics Canada census data.

The final sample of 529 respondents completing an online survey yields a margin of error of +/- 4.3% margin of error at the 95% level of confidence.

Key Findings

Following are report highlights with detailed findings to follow.

Seniors' Discount

- ▶ Opinion across the province is somewhat divided regarding the reduction of the seniors' discount to 50%, with almost half of all participants that agree (48%) versus 44% that disagree.

Gaming on Major Routes

- ▶ On the topic of gaming being introduced on the major routes opinion is again somewhat divided amongst respondents, with a total of 41% that agree with the idea versus 46% disagreeing.

Discounts for Frequent Users Based on Volume of Trips on all Routes

- ▶ The large majority of respondents agree with discounts for frequent users of the ferry service based on volume of trips on all routes (85%), with 10% that disagree.

Variable Pricing (fares at less busy times could cost less, and fares at busier times could cost more)

- ▶ More than two-thirds of all respondents agree with variable pricing (69%), with almost one-third that agree strongly (30%); a total of one-quarter expresses disagreement with this approach to pricing (24%), with about one-in-ten that strongly disagree (12%)

Discount Fares for Early Booking

- ▶ Discount fares for early booking receives strong support with more than three-quarters of all respondents agreeing (77%), with more than four-in-ten that strongly agree (42%); a total of 13% disagree.

Ability to Purchase, in Advance of a Sailing, Tickets that Include a Reservation

- ▶ The large majority of respondents agree with providing the option of purchasing tickets in advance of a sailing that include a reservation (84%), with more than half that agree strongly (53%); just 5% disagree.

Reservations on Minor Routes at Locations where Feasible

- ▶ More than two-thirds of all participants agree with allowing reservations on minor routes at locations where feasible (69%), with one-third that strongly agree with this (32%); fewer than one-in-ten disagree (9%).

Supplemental Private Passenger-Only Service would be Useful for my Community

- ▶ One-quarter of all respondents believe such a service would be useful (24%), with one-in-ten that agree strongly with the idea of this service.
- ▶ More than half of all respondents are neutral with regard the usefulness of a passenger-only ferry for their community (57%), with a further one-in-five that disagree that the service would be of use in their community (19%).

We need Supplemental Private Passenger-only Service at Times of Day when the Ferry Service is not Running

- ▶ More than one-third of all respondents agree with the need for a supplemental private passenger-only service to run during times of day when the ferry service is not running (37%), compared with 15% overall that disagree; about half of all respondents are neutral on the matter (48%).

We need Supplemental Private Passenger-only Service throughout the day

- ▶ About one-quarter of all respondents agree such a service would be useful (23%), with fewer than one-in-ten that agree strongly (6%).
- ▶ More than half of all respondents are neutral on the usefulness of a passenger-only ferry service running throughout the day, with a further one-in-five that disagree with the need for it (20%).

Detailed Findings

1.0 Medium-Term Plans

During the 2012 Consultation and Engagement, participants were asked to provide feedback on measures that could contribute to the long-term sustainability and affordability of the coastal ferry service. Feedback received during this round of consultation suggested that the seniors' discount could be reduced if would help to reduce pressure on future ferry fare increases for all users.

Participants in the 2012 Consultation and Engagement also suggested that the BC Ferries' reservation system could be expanded and/or adjusted to improve efficiency and provide greater certainty for travelers and, perhaps, reduce costs.

As part of the engagement in 2013 coastal residents, ferry users and residents across British Columbia were therefore asked to register their support or opposition to such measures.

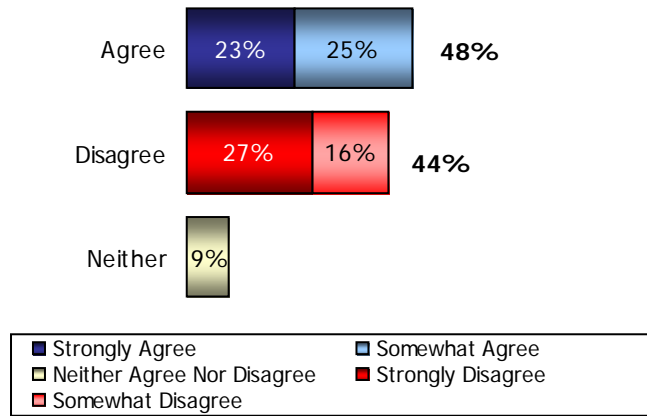
The following outline results from the random, representative sample of BC residents.

1.1 Seniors' Discount

Consistent with feedback received during the last round of community engagement in 2012, the Province and BC Ferries are reducing the seniors' discount, currently offered Monday to Thursday on most routes, by 50% commencing in April 2014. This reduction would generate an estimated \$6 million per year in savings to reduce the rate of increase in fares for all users. (There would be no change to the 33% discount for seniors travelling on the Northern routes).

Senior's Discount

Q1.1 Please rate your level of agreement with a 50% reduction in the senior's discount.



Base: (n=515)

Note: Totals may not add up to 100% due to rounding.

- ▶ Opinion across the province is somewhat divided regarding the reduction of the seniors' discount to 50%, with almost half of all participants that agree (48%) versus 44% that disagree.
- ▶ Results do not differ significantly by gender, age group or region.

Additional Comments:

Among the 332 respondents providing further comments, half reiterate their opposition to reduction of the discount, with one-in-ten highlighting how it would lead to reduced ridership and subsequent loss of revenue in other areas.

One-in-five respondents reiterate their support for the reduction of the discount, stating their belief that seniors can afford the reduced discount.

Other comments are generally an opportunity for participants to voice other general concerns, thoughts and suggestions about the ferry service.

Comments Regarding Seniors' Discount	
<i>Please provide reasons for your level of agreement:</i>	Total Commenting (332) #
Disagree with Reducing the Seniors' Discount	
Do not remove the current seniors' discount	164
Seniors' discount removal will reduce ferry usage/ will stop travelling with their vehicles/ loss of revenue on-board/ at terminals	33
Current discount allows seniors to keep active/ social/ in touch with family members	19
Skeptical about the \$6 million in savings/ BC Ferries is reimbursed for discount by the Ministry of Transportation and Infrastructure/ do not believe BC Ferries is losing any money by offering the current seniors' discount	14
Agree with Reducing the Seniors' Discount	
Agree with proposed changes/ seniors can afford to travel at new 50% rate/ ferry services should be self-sustaining/ user pay	68
Remove seniors' discount altogether/ should pay full fare	27
With an aging population, free travel is not economically sustainable	8
Other Comments	
Should be free/ discounted dependent upon socio-economic need (i.e. low income, students, disabled)	34
Reduce fares/ offer discounts/ high fares resulting in decreased ridership	22
Ferry service is an essential service/ coastal and Island communities are completely dependent upon ferry service (i.e. economic, quality of life)	21
<i>Continued...</i>	

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

Comments Regarding Senior's Discount (cont'd.)	
<i>Please provide reasons for your level of agreement:</i>	Total Commenting (332) #
Other Comments (cont'd)	
Miscellaneous discount option suggestions (e.g. 50% 2 days per week, free travel 2 days per week)	19
Save costs by reducing administration/ management salaries/ pensions/ compensation	17
Discontinue free trips for ferry employees	16
Operational cost reductions (e.g. crew size, fuel, maintenance, operate like Washington State Ferries, right size vessels, Powell River Berth suggestions)	7
Comments regarding inland ferries (i.e. they should not be free if coastal ferries are user pay)	2

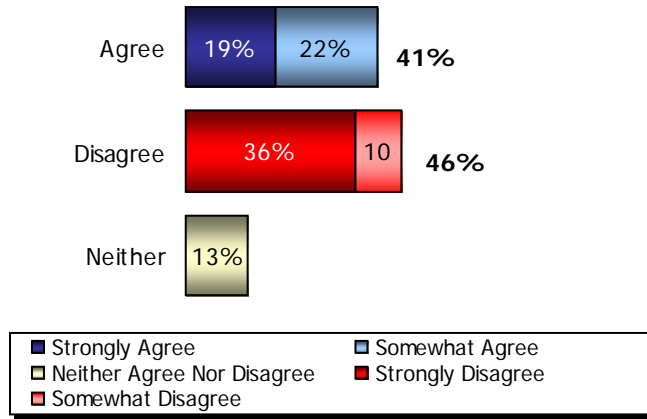
Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

1.2 Permanent Gaming on Major Routes

The idea of producing new revenue through gaming on BC Ferries was raised during the last round of community engagement in 2012. The Province is considering the introduction of gaming (slot machines) on major routes, starting with a pilot project on the Tsawwassen – Swartz Bay route.

Gaming on Major Routes

Q1.2 Along with considering a Gaming Pilot Project, we're interested in your feedback on introducing gaming as a permanent revenue-generating program on major routes between Vancouver Island and the Lower Mainland. Please indicate your level of agreement with permanent gaming on major routes.



Base: (n=514)

Note: Totals may not add up to 100% due to rounding.

- ▶ On the topic of gaming being introduced on the major routes opinion is again somewhat divided amongst respondents, with a total of 41% that agree with the idea versus 46% disagreeing.
- ▶ The strength of feeling is somewhat more pronounced amongst those disagreeing with the proposal, with 36% that “strongly disagree” versus 19% that says they “strongly agree”.

Additional Comments:

Of the 285 respondents providing further comments, about one-third state their negative impressions of gambling in general that it is immoral or seen as a tax on the poor.

A further one-in-five expresses concerns regarding gambling addiction, with the same proportion again that states gaming machines would be inappropriate in the setting of a ferry, particularly where there will be children.

About one-quarter of those commenting believes gaming would provide revenue to help maintain routes and reduce fares; a further one-in-ten is supportive of gaming as they see it as a personal choice, with a similar proportion that sees it as a good source of entertainment.

Comments Regarding Permanent Gaming on Major Routes	
<i>Please provide reasons for your level of agreement:</i>	Total Commenting (285) #
Disagree with Permanent Gaming on Major Routes	
Miscellaneous negative gambling comments (e.g. a “poor tax”, immoral)	98
Gambling takes advantage of addicts/ addiction concerns	59
Inappropriate in a public setting/ captive audience/ concern about exposing children to gambling	57
Skeptical of any revenue gains (i.e. would have to hire additional staff, slot machine maintenance)	15
Too many amenities, cruise ship style luxury is not needed	9
Concerned about reduced seating	6
Agree with Permanent Gaming on Major Routes	
On-board gambling will keep routes in service/ reduce fares	74
Supportive of gaming/ gambling is a personal choice	36
Slot machines would be a good source of entertainment	25
Need a separate area/ monitored/ unobtrusive	23
Increase revenue by adding services on vessels or at terminals, such as casinos, bars, restaurants and retail services	2
Should also have an on-board bar/ licensed lounge	1
Other Comments	
Ferry service is an essential service/ coastal and Island communities are completely dependent upon ferry service (i.e. economic, quality of life)	5
Save costs by reducing administration/ management salaries/ pensions/ compensation	5
Operational cost reductions (e.g. crew size, fuel, maintenance, operate like Washington State Ferries, right-size vessels, Powell River berth suggestions)	4

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

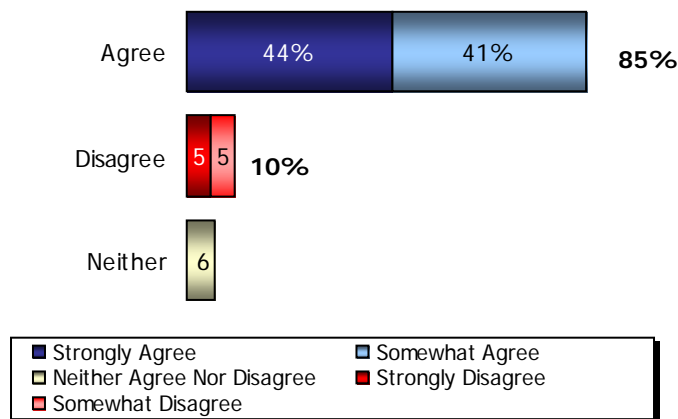
Reservation System, Time-of-Day Pricing, and Loyalty Programs

BC Ferries is implementing new customer service technology that will replace its aged point-of-sale and reservation system and allow the company to respond to changing business needs. The new system will support marketing, travel services and pricing initiatives, and will include a range of features.

Respondents were asked to register their level of agreement regarding the following five features and initiatives.

1.3 Discounts for frequent users based on volume of trips on all routes

Q1.3 Please indicate your level of agreement with discounts for frequent users based on volume of trips on all routes.



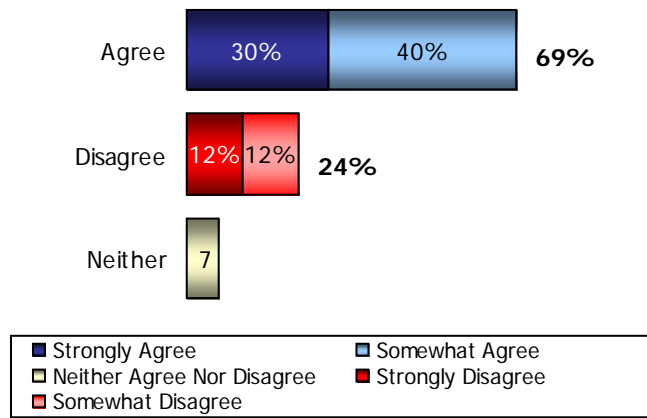
Base: (n=517)

Note: Totals may not add up to 100% due to rounding.

- ▶ The large majority of respondents agree with discounts for frequent users of the ferry service based on volume of trips on all routes (85%). This level of support is consistent amongst all demographic segments.
- ▶ Just one-in-ten disagree with this option (10%), with the remainder neutral on the subject.

1.4 Variable Pricing (fares at less busy times could cost less, and fares at busier times could cost more)

Q1.4 Please indicate your level of agreement with variable pricing (fares at less busy times could cost less, and fares at busier times could cost more).



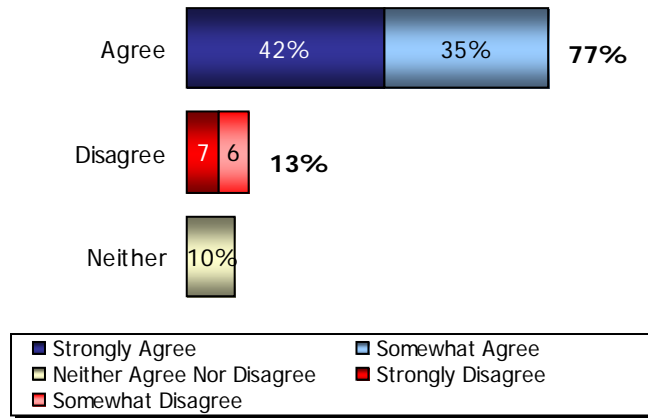
Base: (n=517)

Note: Totals may not add up to 100% due to rounding.

- More than two-thirds of all respondents agree with variable pricing, with almost one-third that agree strongly.
- Once again this level of agreement is consistent amongst all demographic segments.
- In all, one-quarter of all respondents expresses disagreement with this approach to pricing, with about one-in-ten that strongly disagree (12%), and the remainder neutral on the subject.

1.5 Discount Fares for Early Booking

Q1.5 Please indicate your level of agreement with discount fares for early booking.



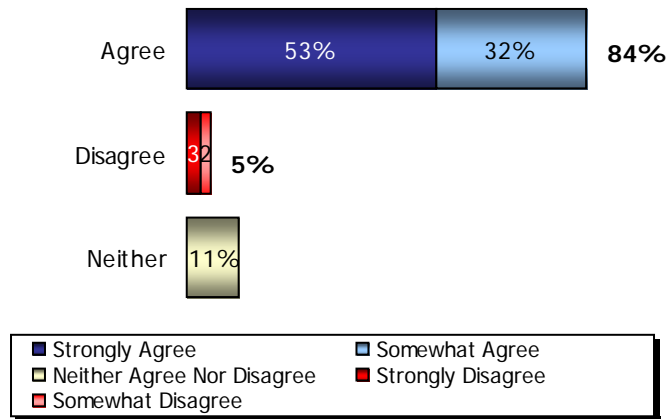
Base: (n=515)

Note: Totals may not add up to 100% due to rounding.

- ▶ Discount fares for early booking receives strong support with more than three-quarters of all respondents agreeing (77%), with more than four-in-ten that strongly agree (42%).
- ▶ About one-in-ten disagree with this offer (13%), with a similar proportion that is neutral on the subject (10%).

1.6 Ability to Purchase, in Advance of a Sailing, Tickets that Include a Reservation

Q1.6 Please indicate your level of agreement with ability to purchase, in advance of a sailing, tickets that include a reservation.



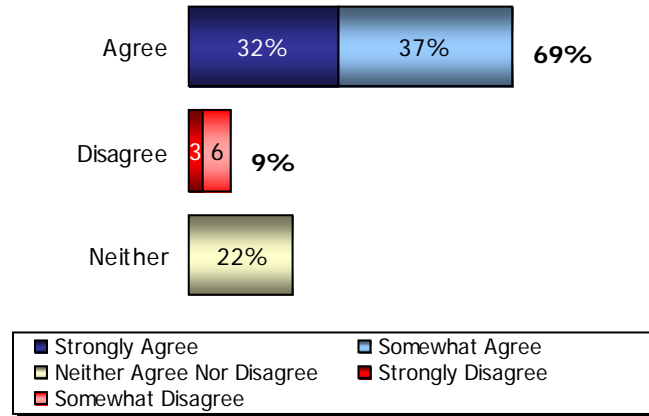
Base: (n=514)

Note: Totals may not add up to 100% due to rounding.

- ▶ The large majority of respondents agree with providing the option of purchasing tickets in advance of a sailing that include a reservation (84%), with more than half that agree strongly (53%).
- ▶ Just 5% of respondents express any disagreement with this service, with the remaining one-in-ten that neutral on the subject.

1.7 Reservations on Minor Routes at Locations where Feasible

Q1.7 Please indicate your level of agreement with reservations on minor routes at locations where feasible.



Base: (n=513)

Note: Totals may not add up to 100% due to rounding.

- ▶ More than two-thirds of all respondents agree with allowing reservations on minor routes at locations where feasible (69%), with one-third that strongly agree with this (32%).
- ▶ About one-in-ten disagree with this service (9%), with the remainder, more than one-in-five, neutral on the subject (22%).

Additional Comments:

- ▶ A total of 116 respondents provided a mix of both positive and negative additional comments regarding the reservation features. On the positive side some respondents believe changes would be beneficial for trip planning (20), be more affordable for frequent travelers (18), and generate guaranteed revenue for a particular route (13).
- ▶ However, some respondents raised concerns that changes would not benefit those who cannot afford the reservation fee (25) or those who cannot travel during discounted periods (15), while others thought the number of reservations should be limited (8).
- ▶ Other comments suggest discounted fares similar to low-cost airlines, including seasonal or last minute rates (23); that fares be reduced in general to encourage more

ridership (15), along with various other reservation suggestions including removing the system altogether.

Comments Regarding Reservation Features	
<i>Please provide reasons for your level of agreement:</i>	Total Commenting (116) #
Disagree with Changes to Reservation System	
This is not beneficial to those who cannot afford the reservation fee/ remove the reservation fee	25
Discriminates against those who cannot travel during discounted period	15
There needs to be a limit on the amount of reservations per sailing	8
Should be offered for all routes/ discriminates against residents of small islands/ only benefits tourists	5
Opposed to changes to the reservation system	2
Agree with Changes to Reservation System	
Would be beneficial in planning trips	20
Would be more affordable for frequent users	18
Support changes to reservation system	14
Would provide guaranteed revenue for the route	13
Would benefit small, isolated communities	1
Other Comments	
Should offer discounts/ fares like airlines/ cruise lines (i.e. seasonal rates, last minute discounts seat sales)	23
Reduce fares/ cannot afford to be a frequent user	15
There should be no penalty for missed reservations/ allow flexibility in changing travel plans	9
Reservation system comments/ suggestions	8
Remove reservation system completely/ should be first come first served	6
Coastal/ Island residents should have special fare rates/ preferred boarding	5
Proposed changes will not help BC Ferries make up revenue shortfall	4
Fare suggestions (e.g. variable rates, based on vehicle size)	3
Should guarantee priority boarding for connecting trips	2

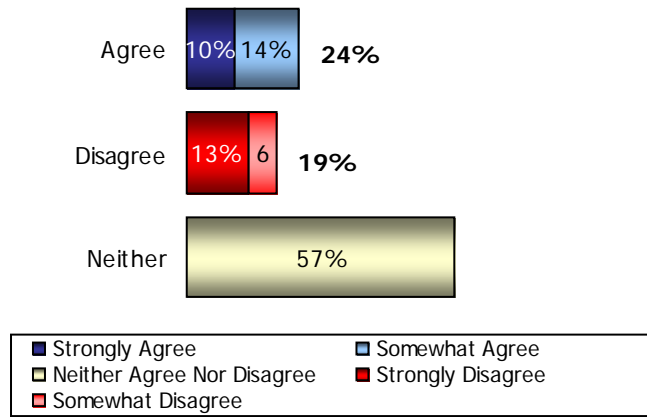
Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

Supplemental Private Passenger-Only Service

Currently, private passenger-only services, such as water taxis, are used to supplement service between some island communities. There may be areas where additional private passenger-only service could be implemented or expanded to help serve a community. It is not anticipated that government would redirect money away from BC Ferries' services to support alternatives, but it could be helpful to understand more fully the transportation desires and demands of local communities. Therefore respondents were asked how a supplemental private passenger-only service might best meet the needs of their community. Respondents were asked to register their level of agreement regarding the following features and initiatives.

1.8 Supplemental Private Passenger-Only Service

Q1.8 Please indicate your level of agreement with: "A supplemental private passenger-only service would be useful for my community."



Base: (n=505)

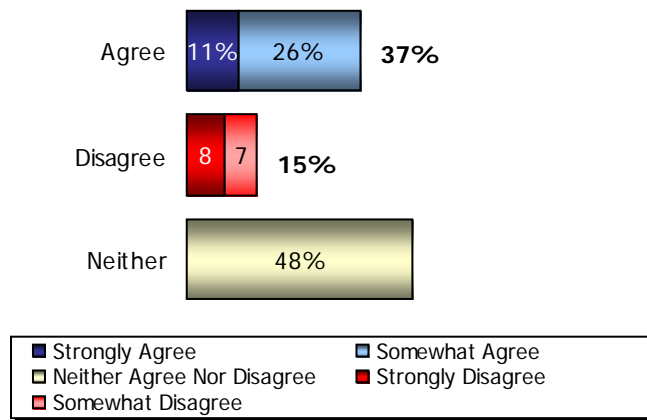
Note: Totals may not add up to 100% due to rounding.

- ▶ Overall, one-quarter of all respondents believes such a service would be useful, with one-in-ten that agree strongly with the idea of this service.
- ▶ More than half of all respondents are neutral with regard the usefulness of a passenger-only ferry for their community (57%), with a further one-in-five that disagree that the service would be of use in their community (19%).
- ▶ Opinion varies across the province from the lowest interest found in Northern B.C. (3% agree), increasing to 21% agree in the south interior, 23% in Metro Vancouver, 29% in the Capital Regional District (29%), to finally the highest level of interest found in other parts of Vancouver Island, Gulf Islands and Sunshine Coast where

about half of all respondents agree the service would be useful in their community (49%).

1.9 Supplemental Private Passenger-Only Service at Times of Day when the Ferry Service is not Running

Q1.9 Please indicate your level of agreement with: “We need supplemental private passenger-only service at times of day when the ferry service is not running.”



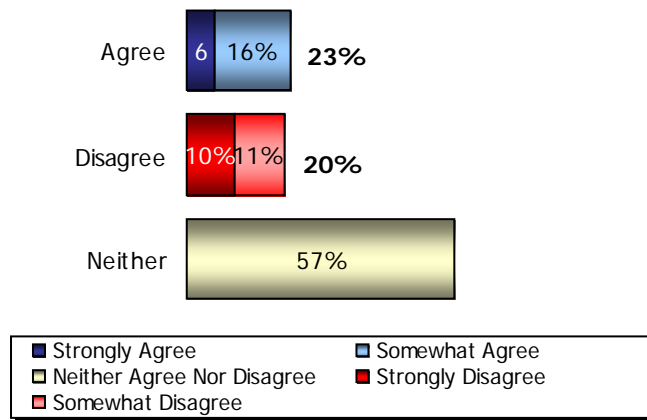
Base: (n=506)

Note: Totals may not add up to 100% due to rounding.

- More than one-third of all respondents agree with the need for a supplemental private passenger-only service to run during times of day when the ferry service is not running (37%), compared with 15% overall that disagree; about half of all respondents are neutral on the matter (48%).
- Opinion is generally consistent throughout the province with the exception of Vancouver Island communities outside of the Capital Regional District, the Gulf Islands and the Sunshine Coast where 37% agree, 26% disagree, and 38% remain neutral.

1.10 Supplemental Private Passenger-Only Service throughout the Day

Q1.10 Please indicate your level of agreement with: “We need a supplemental private passenger-only service throughout the day.”



Base: (n=502)

Note: Totals may not add up to 100% due to rounding.

- ▶ About one-quarter of all respondents agree such a service would be useful (23%), with fewer than one-in-ten that agree strongly (6%).
- ▶ More than half of all respondents are neutral on the usefulness of a passenger-only ferry service running throughout the day, with a further one-in-five that disagree with the need for it (20%).
- ▶ Opinion is generally consistent throughout the province with the exception of Vancouver Island communities outside of the Capital Regional District, the Gulf Islands and the Sunshine Coast where 34% agree, 31% disagree, and 35% remain neutral.

Additional Comments:

Just 18 respondents made additional comments regarding a supplemental private passenger-only ferry service. These include comments such as noting a need for affordable fares, a direct service between larger urban centres, faster service than the current ferry service, the need for connecting transit service, and provision of an early morning and late evening service.

Comments Regarding Supplemental Private Passenger-Only Service	
<i>What would make supplemental private passenger-only service effective for your community?</i>	Total Commenting (18) #
Require reasonable fares	4
Offer direct trips to Vancouver/ Nanaimo/ Victoria	4
Passenger-only service is not necessary	3
Faster travel times than current ferries	3
Require early morning/ late evening service	2
Would require public transit/ shuttle service	2
Scheduled trips when regular ferry is not running/ alternative time	2
Frequent/ regular service throughout the day	2
Weekend/ summer tourist season service	2
Safe/ able to operate in rough conditions	2
Offer direct trips to/ between the islands	1
Needed for medical emergency/ last minute trips	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.0 Reducing Round Trip Sailings

The Province has set an objective of \$18.9 million in net savings to be achieved through service reductions by 2016. A service reduction plan on the minor and Northern routes has been identified to achieve net savings of \$14 million through to 2016. A further \$4.9 million in savings will come from future changes to the three “major” routes connecting Vancouver Island to the Lower Mainland.

As part of the engagement in 2013 coastal residents, ferry users and residents across British Columbia were also asked to register their support or opposition to the planned service reductions to the minor and Northern routes. A separate engagement process will be undertaken to seek feedback on changes to the major routes.

In the following section of the survey respondents were presented with details of planned reductions on specific routes and asked to provide feedback regarding those reductions. Respondents were able to choose which routes they commented on and therefore the base sizes are, in most cases, very small. As a result it is recommended these results be interpreted as an indication of opinion rather than reliably representative of the population as a whole.

2.1 Route 3 Comments – Langdale to Horseshoe Bay

Of the 48 respondents commenting on the Langdale to Horseshoe Bay service, most express agreement with the proposed change (33), with 11 that disagree. Other comments generally raise concerns regarding the impact upon commuters and businesses or suggest alternative reductions.

Comments Regarding Langdale to Horseshoe Bay	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (48) #
Agree with proposed service reduction	33
Disagree with proposed service reduction	11
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	5
Would negatively impact commuters	4
Alternative service reduction suggestions	4
Find savings elsewhere/ be more efficient	2
Powell River berth suggestions	2
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	2
Proposed service reduction interferes with other ferry connections	1
Would negatively impact sports teams	1
Would negatively impact tourists/ leisure travel	1
Will create economic hardship (e.g. loss of business, additional trip costs)	1

Build a fixed link (bridge or tunnel)	1
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Note: The number of comments in the above table may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.2 Route 6 Comments – Vesuvius Harbour to Crofton

In all, 20 respondents provided additional comments regarding changes to the Vesuvius Harbour to Crofton service; just five agree with the changes versus half that outright disagree.

Other comments raise concerns about the changes stating that the ferry service is part of the highway system, or express concerns about the impact the changes will have on commuters, tourism and leisure travel and sports teams, and make alternative suggestions of the changes they would like to see.

Comments Regarding Vesuvius Harbour to Crofton	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u>
	(20)
	#
Disagree with proposed service reduction	10
Agree with proposed service reduction	5
Alternative service reduction suggestions	5
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	4
Would negatively impact commuters	3
Would negatively impact tourists/ leisure travel	3
Find savings elsewhere/ be more efficient	2
Would negatively impact sports teams	2
Will create economic hardship (e.g. loss of business, additional trip costs)	2

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.3 Route 7 Comments – Earls Cove to Saltery Bay

Of the 14 respondents providing comments about changes to the Earl’s Cove to Saltery Bay service, opinion is divided between half that agree with the changes and half that either disagree or expresses concern about the changes, that the service is essential, that changes will impact commuters and create economic hardship, or they provide alternative reduction suggestions.

Comments Regarding Earls Cove to Saltery Bay	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total <u>Commenting</u> (14) #
Agree with proposed service reduction	7
Disagree with proposed service reduction	5
Alternative service reduction suggestions	4
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	4
Would negatively impact commuters	2
Proposed service reduction interferes with other ferry connections	2
Will create economic hardship (e.g. loss of business, additional trip costs)	2
Find savings elsewhere/ be more efficient	1
Would negatively impact tourists/ leisure travel	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.4 Route 8 Comments – Horseshoe Bay to Bowen Island

A total of 23 respondents provided additional comments regarding changes to the Horseshoe Bay to Bowen Island service with the majority expressing their clear disagreement with the changes (17), compared with just 5 who agree.

The other comments include concerns about the negative impact upon commuters, sports teams, tourists and leisure travel, that the service is essential and savings should be found elsewhere.

Comments Regarding Horseshoe Bay to Bowen Island	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (23) #
Disagree with proposed service reduction	17
Agree with proposed service reduction	5
Would negatively impact commuters	5
Alternative service reduction suggestions	4
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	3
Would negatively impact sports teams	2
Would negatively impact tourists/ leisure travel	2
Will create economic hardship (e.g. loss of business, additional trip costs)	1
Find savings elsewhere/ be more efficient	1
Build a fixed link (bridge or tunnel)	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.5 Route 9 Comments – Tsawwassen to Southern Gulf Islands

In all, 43 respondents provided additional comments regarding changes to the Tsawwassen to Southern Gulf Islands service with more than half of them expressing agreement with the changes (25), compared with about one-third that explicitly disagree (15).

The remaining comments generally raise concerns about the changes, such as the likely economic hardship amongst users of the service that will result, the impact on tourism and commuters, and the need to find savings elsewhere.

Comments Regarding Tsawwassen to Southern Gulf Islands	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (43) #
Agree with proposed service reduction	25
Disagree with proposed service reduction	15
Will create economic hardship (e.g. loss of business, additional trip costs)	5
Would negatively impact tourists/ leisure travel	4
Alternative service reduction suggestions	2
Would negatively impact commuters	1
Find savings elsewhere/ be more efficient	1
Proposed service reduction interferes with other ferry connections	1
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.6 Route 10 Comments – Port Hardy to Mid-Coast to Prince Rupert

Of the 19 respondents providing additional comments regarding changes to the Port Hardy to mid-coast to Prince Rupert ferry service about three-quarters explicitly disagree with the changes (14), compared with just five that agree.

Other comments generally express concerns with the changes, highlighting how the ferry service is essential to the communities that rely upon it, that it should be viewed as part of the highway system, and further raise concerns regarding the impact of the changes will have upon various aspects of life of those that use the service.

Comments Regarding Port Hardy to Mid-Coast to Prince Rupert	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (19) #
Disagree with proposed service reduction	14
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	6
Agree with proposed service reduction	5
Alternative service reduction suggestions	5
Will create economic hardship (e.g. loss of business, additional trip costs)	5
Would negatively impact tourists/ leisure travel	2
Find savings elsewhere/ be more efficient	1
Proposed service reduction interferes with other ferry connections	1
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	1
Would negatively impact commuters	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.7 Route 11 Comments – Skidegate to Prince Rupert

Of the fifteen respondents providing comments regarding changes to the Skidegate to Prince Rupert service the majority explicitly disagree with the changes (11), compared with 3 that agree, while the remaining comments voice various concerns about the impact of the changes, the need to find savings elsewhere along with alternative recommended service reductions.

Comments Regarding Skidegate to Prince Rupert	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (15) #
Disagree with proposed service reduction	11
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	6
Agree with proposed service reduction	3
Alternative service reduction suggestions	2
Will create economic hardship (e.g. loss of business, additional trip costs)	2
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	1
Would negatively impact commuters	1
Find savings elsewhere/ be more efficient	1
Would negatively impact tourists/ leisure travel	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.8 Route 17 Comments – Comox to Powell River

A total of 17 respondents provided additional comments regarding changes to the Comox to Powell River service with 7 that express agreement with the changes compared with 3 that disagree. However, the remaining comments all raise strong concerns about the changes highlighting how the ferry service is essential to the communities that use it, and the impact changes would have on the community residents, commuters and sports teams, and that it should be viewed as part of the highway system.

Comments Regarding Comox to Powell River	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u>
	(17)
	#
Agree with proposed service reduction	7
Disagree with proposed service reduction	3
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	3
Alternative service reduction suggestions	2
Find savings elsewhere/ be more efficient	2
Would negatively impact commuters	1
Powell River berth suggestions	1
Would negatively impact sports teams	1
Will create economic hardship (e.g. loss of business, additional trip costs)	1
Disagree with service reductions on all routes	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.9 Route 18 Comments – Texada Island to Powell River

Of the 12 respondents that provided additional comments regarding the changes to the Texada Island to Powell River service 4 agreed with the changes compared with 3 that explicitly disagreed, while the remaining comments raise concerns about the changes, such as the impact upon commuters and sports teams, providing alternative reduction ideas or suggesting savings be found elsewhere.

Comments Regarding Texada Island to Powell River	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total <u>Commenting</u> (12) #
Find savings elsewhere/ be more efficient	5
Agree with proposed service reduction	4
Disagree with proposed service reduction	3
Would negatively impact commuters	2
Alternative service reduction suggestions	2
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	2
Would negatively impact sports teams	1
Will create economic hardship (e.g. loss of business, additional trip costs)	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.10 Route 19 Comments – Gabriola Island to Nanaimo Harbour

In all, 16 respondents provided additional comments regarding changes to the Gabriola Island to Nanaimo Harbour service with just 2 that agree with the changes compared with 8 that disagree either with the proposed changes or reductions in general. The remaining comments also raise concerns with the changes, highlighting how the service is essential to coastal communities, the negative impact reductions would have, offering suggestions for alternative reductions, that savings might be found elsewhere or even that a bridge should be built instead.

Comments Regarding Gabriola Island to Nanaimo Harbour	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total Commenting (16) #
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	5
Disagree with service reductions on all routes	5
Disagree with proposed service reduction	3
Would negatively impact commuters	3
Alternative service reduction suggestions	3
Find savings elsewhere/ be more efficient	3
Build a fixed link (bridge or tunnel)	3
Agree with proposed service reduction	2
Will create economic hardship (e.g. loss of business, additional trip costs)	2
Would negatively impact sports teams	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.11 Route 20 Comments – Chemainus to Thetis to Penelakut

Just 11 respondents provided additional comments regarding changes to the Chemainus to Thetis to Penelakut service, 6 of whom agree with the changes while the remaining comments disagree, either explicitly or in general by raising concerns about their impact.

Comments Regarding Chemainus to Thetis to Penelakut	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (11) #
Agree with proposed service reduction	6
Find savings elsewhere/ be more efficient	4
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	4
Disagree with proposed service reduction	2
Would negatively impact commuters	2
Alternative service reduction suggestions	1
Would negatively impact sports teams	1
Will create economic hardship (e.g. loss of business, additional trip costs)	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.12 Route 21 Comments – Buckley Bay to Denman Island

In all, 16 respondents provided additional comments regarding changes to the Buckley Bay to Denman Island service with just 3 that agree with the changes compared with 5 who explicitly disagree. The remaining comments also raise concerns about the changes, stating that the service is essential and highlighting concerns about the various impacts that the changes would bring to the people using the service.

Comments Regarding Buckley Bay to Denman Island	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total <u>Commenting</u> (16) #
Find savings elsewhere/ be more efficient	8
Disagree with proposed service reduction	5
Agree with proposed service reduction	3
Would negatively impact commuters	3
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	3
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	1
Alternative service reduction suggestions	1
Proposed service reduction interferes with other ferry connections	1
Would negatively impact tourists/ leisure travel	1
Will create economic hardship (e.g. loss of business, additional trip costs)	1
Build a fixed link (bridge or tunnel)	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.13 Route 22 Comments – Hornby Island to Denman Island

Of the 17 respondents that provided additional comments regarding changes to the Hornby Island to Denman Island service just 4 express agreement while 9 disagreed with the service reductions, either explicitly or in general. The remaining comments generally raise concerns with the changes, stating that the service is essential and highlighting concerns about the various impacts that the changes would bring to the people using the service, suggesting alternative reductions or that savings be made elsewhere.

Comments Regarding Hornby Island to Denman Island	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (17) #
Disagree with proposed service reduction	8
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	5
Agree with proposed service reduction	4
Alternative service reduction suggestions	2
Find savings elsewhere/ be more efficient	2
Will create economic hardship (e.g. loss of business, additional trip costs)	2
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	1
Would negatively impact commuters	1
Disagree with service reductions on all routes	1
Build a fixed link (bridge or tunnel)	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.14 Route 23 Comments – Quadra Island to Campbell River

Of the 17 respondents that provided additional comments regarding the Quadra Island to Campbell River service a total of 9 say they agree with the reductions described. This is compared with 5 who disagree with the service reductions, either explicitly or in general, expressing concerns with the various impacts that the changes would bring to the people using the service, suggesting alternative reductions or that savings be made elsewhere.

Comments Regarding Quadra Island to Campbell River	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total <u>Commenting</u> (17) #
Agree with proposed service reduction	9
Find savings elsewhere/ be more efficient	4
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	4
Disagree with proposed service reduction	3
Will create economic hardship (e.g. loss of business, additional trip costs)	3
Disagree with service reductions on all routes	2
Would negatively impact commuters	2
Alternative service reduction suggestions	2
Would negatively impact sports teams	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.15 Route 26 Comments – Skidegate to Alliford Bay

A total of 13 respondents provided additional comments regarding changes to the Skidegate to Alliford Bay service, 4 of whom agree with the changes, while the others disagree, either explicitly or generally by expressing concerns about the various impacts that the changes would bring to the people using the service, suggesting alternative reductions or that savings be made elsewhere.

Comments Regarding Skidegate to Alliford Bay	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total <u>Commenting</u> (13) #
Find savings elsewhere/ be more efficient	5
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	5
Agree with proposed service reduction	4
Disagree with proposed service reduction	4
Would negatively impact commuters	4
Will create economic hardship (e.g. loss of business, additional trip costs)	2
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	1
Alternative service reduction suggestions	1
Proposed service reduction interferes with other ferry connections	1
Would negatively impact sports teams	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

2.16 Route 40 Comments – Port Hardy to Mid-Coast to Bella Coola

Of the 19 respondents that provided additional comments regarding the Port Hardy to mid-coast to Bella Coola service, just 4 agreed with the planned reductions, while the majority of respondents feel that savings should be found elsewhere, that the service is essential and should be viewed as part of the highway.

Comments Regarding Port Hardy to Mid-Coast to Bella Coola	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (19) #
Find savings elsewhere/ be more efficient	13
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	9
Disagree with proposed service reduction	5
Agree with proposed service reduction	4
Skeptical of usage data (i.e. inaccurate, does not include foot passengers)	3
Would negatively impact commuters	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

3.0 Additional Comments

In all, 184 respondents provided additional comments, many of which echo comments made previously. A total of 25 respondents further express agreement with the planned reductions, while the majority of the other comments generally express disagreement with planned reductions and other cost saving measures or raise concerns about their impact.

Among the many comments made the most common include the belief that the ferry service is essential and should be seen as part of the highway system; others suggest that high fares have led to decreased ridership, that reduced fares would encourage use of the ferry service and bring in more revenue; the belief that savings could be found by reducing administrative costs, particularly in the area of management compensation such as salaries and bonuses; cost savings could be found by running the service more efficiently, with the comparison made to the Washington State Ferries, by adjusting crew sizes, vessel types, or schedules including where vessels are berthed, as in the case of Powell River.

Additional Comments	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	<u>Total Commenting</u> (184) #
Reduce fares/ offer discounts/ high fares resulting in decreased ridership	56
Ferry service is an essential service/ Coastal communities are completely dependent upon ferry service/ BC Ferries are part of the highway system/ should be funded by the entire province	55
Save costs by reducing administration/ management salaries/ pensions/ compensation	49
Operational cost reductions (i.e. crew size, fuel, maintenance, operate like Washington State Ferries, right-size vessels, Powell River berth suggestions)	35
Opposed to service reductions on all routes	29
Support service reductions	25
Don't like the ferry authority model/ Coastal Ferry Act/ BC Ferries should not have been privatized/ revert to crown corporation	14
Too many amenities, cruise ship-style luxury is not needed	14
Comments about the consultation/ inadequate consideration of previous feedback/ need for additional consultation	13
Ferry service should be self-sustaining and paid for by the user	12
Build a fixed link (bridge or tunnel)	11
Service reductions will have a negative impact on economy/ businesses/ tourism/ access to employment	10
Service reductions will affect social fabric/ communities/ result in de-population	10

Continued...

Additional Comments	
<i>Please provide comments for consideration prior to the implementation of these changes:</i>	Total Commenting (184) #
Ferry service should be run like any other business	10
Increase revenue by adding services on vessels or at terminals, such as casinos, bars, restaurants and retail services	7
Opposed to gaming (i.e. immoral, takes advantage of addicts)	6
Opposed to reducing seniors' discount	6
Opposed to free ferry passes for employees/ retired employees	5
Anti-government/ BC Liberal comments	5
Comments regarding inland ferries (i.e. they should not be free if coastal ferries are user pay)	3
Support reducing seniors' discount	3
Support changes to the reservation system	3
Support passenger-only service	2
Reduce the amount of advertising	1
Reservation system comments (e.g. remove fee, should be reservation only)	1
End of day/ beginning of day sailings should not be reduced	1
Service reductions will affect access to culture/ recreation	1
Service reductions will impact access to health services	1
Service reductions will result in fewer overall users/ loss of revenue	1
Miscellaneous comments	1

Note: The number of comments may exceed the total commenting, as poll respondents may have commented on more than one topic.

Appendices

Questionnaire

