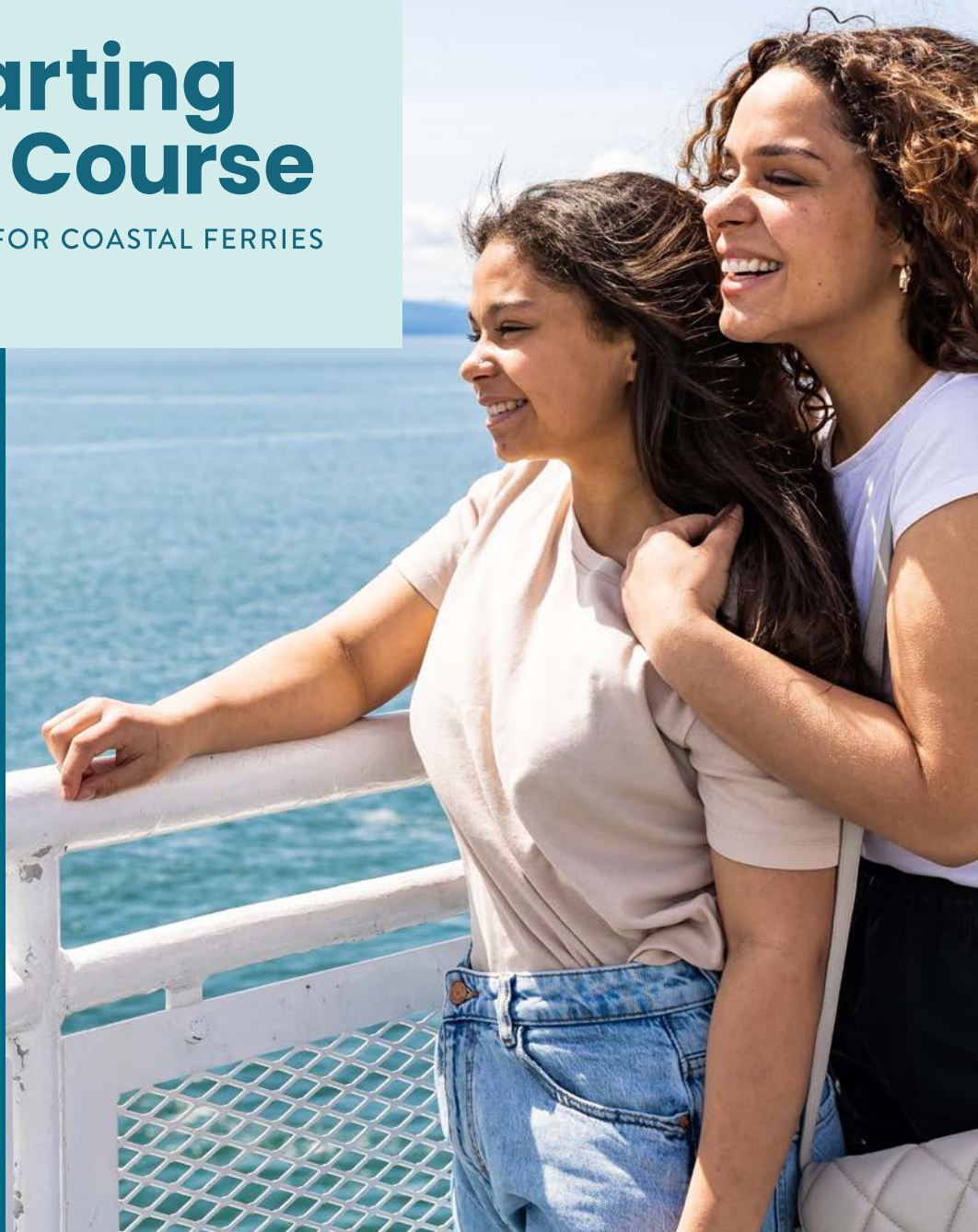




Charting the Course

A VISION FOR COASTAL FERRIES



Engagement & update report



MARCH 2024

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CEO Message



WE MUST EVOLVE HOW
WE WORK WITH THE
COMMUNITIES WE SERVE.

BC Ferries is an essential public service – one that moves millions of people around our province every year. We hear every day from our customers what’s important to them, and it’s reassuring to see those same themes rise to the top in what the broader public and our partners shared with us during the Fall 2023 portion of our Charting the Course public engagement.

It’s your feedback that guides how we “Chart the Course” for today and well into the future. Having full confidence that our priorities align with the public’s sets a strong mandate for us to keep pushing ahead, particularly with our work to deliver more capacity and reliability, while balancing those significant efforts with keeping ferry travel as affordable as possible.

Specifically, you told us that operating in the public interest means focusing on the goals of reliable and available services that are affordable and efficient, safe and comfortable, convenient and integrated, and environmentally sensitive and resilient. There are some clear areas where we are acting now, and where we need to keep making progress as we look longer term. Based on these engagement results, over the coming months, we’ll be digging deeper into a review of service levels, how ferry services can be better integrated into the wider transportation network, the role we play in the movement of goods, what improvements we can make in our approach to both pricing and demand management, to doing our part in reducing GHG emissions.

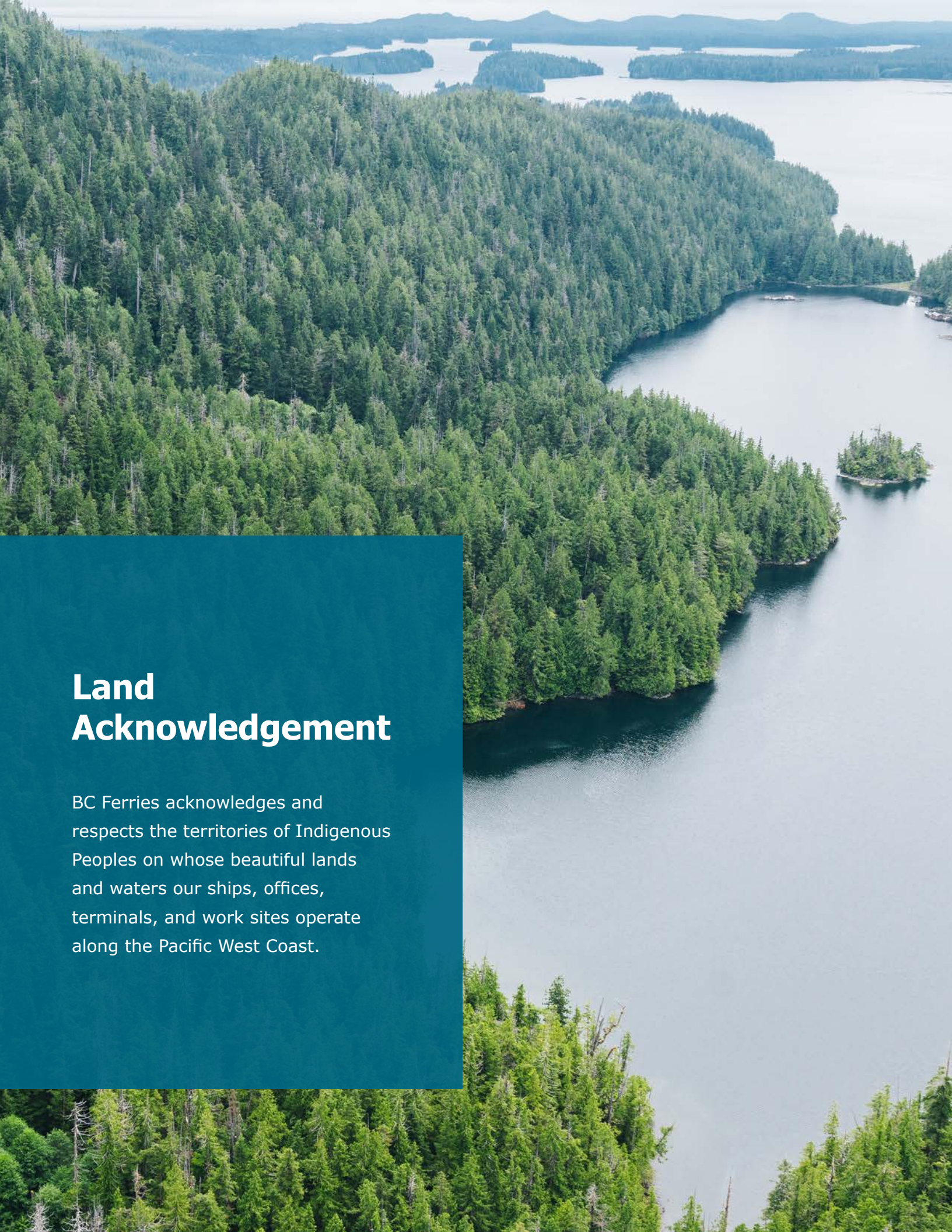
We are tackling more immediate priorities at the same time. Our people are our most important asset, and for too long they haven’t seen their pay keep up with the market. We’re in the process of fixing that while enhancing other components of their jobs to improve work-life balance and set ourselves back on the path to be an employer of choice.

On the infrastructure side, we have an aging fleet that is in need of renewal, and we have a plan to do that in a way that gets us ready to handle the fast-growing population here in B.C.

We also must evolve how we work with the communities we serve. That means doing more to hear directly from people who live there and continuing to build strong partnerships with the Indigenous communities on whose traditional territories we operate every day.

We are focused on building a more resilient ferry service to take us into the future: a service that is affordable, improves reliability, has built-in redundancy, can be supported by our shareholder and stakeholders, and provides our people with long-term career growth and opportunity.

Nicolas Jimenez

An aerial photograph showing a vast, dense forest of evergreen trees covering a coastline. The forest meets a large body of water, which features several small, tree-covered islands and peninsulas. In the background, more forested land and distant mountains are visible under a clear sky. A dark teal rectangular box is overlaid on the left side of the image, containing white text.

Land Acknowledgement

BC Ferries acknowledges and respects the territories of Indigenous Peoples on whose beautiful lands and waters our ships, offices, terminals, and work sites operate along the Pacific West Coast.

Overview of Process

In response to the evolving needs of the many communities we serve, BC Ferries Inc, and the BC Ferry Authority (together, BC Ferries) are leading a new journey to reshape our role in the delivery of coastal ferry services. Called *Charting the Course*, it aims to identify what's needed to keep people, goods, and services in coastal communities connected today and well into the future.

Our approach was designed to ensure we heard from diverse voices and to lay the groundwork for a vision for the coastal ferry system that reflects the aspirations of those who use and rely on this essential service.

Recognizing the many challenges and opportunities presented by long-term trends in population growth, how and where people live and work, technological advances, climate change impacts and evolving infrastructure needs from trends such as vehicle electrification, we are firmly committed to creating a ferry system that's sustainable, resilient and equipped to serve future generations. As a first step in this journey, we undertook comprehensive public engagement in Fall 2023 to talk about our vision and to gather feedback on six proposed goals and objectives for the ferry system, which are that it be reliable, integrated, safe, climate sensitive, affordable and efficient, and user-focused.

This report summarizes the Fall 2023 engagement activities and provides an overview of BC Ferries' response to the feedback we received from the public. The report concludes with a brief discussion about next steps, including future areas of engagement. The detailed Fall 2023 engagement report is included in the Appendix.



- ✓ RELIABLE
- ✓ INTEGRATED
- ✓ SAFE
- ✓ ENVIRONMENTALLY SENSITIVE & RESILIENT
- ✓ AFFORDABLE & EFFICIENT
- ✓ USER-FOCUSED

Fall Engagement Summary

The Fall 2023 engagement focused on a ferry system operating in the public interest, sharing and receiving feedback on six proposed goals and objectives to guide long-term planning activities. The engagement also captured additional topics for the vision to address. Through a series of targeted workshops, discussions and an online survey, BC Ferries received feedback from the public, BC Ferries' staff and key interest holders.

Overall, we found robust support for all six proposed goals and objectives.

The feedback paints a nuanced picture, highlighting the relationship between current operational challenges and aspirations for future enhancements. Participants expressed dissatisfaction with cancellations particularly in the past two summers – especially those that were the result of staffing issues and mechanical failures – and emphasized the need for increased sailing frequency, particularly during peak periods. This points to an operational gap we are currently addressing, with a focus on better staffing strategies and proactively addressing mechanical issues where possible.



We also heard there is a need for an equitable and efficient reservation system, coupled with affordable pricing. The feedback – especially from residents and local community members – suggests that the current system is perceived as inequitable and should better reflect the needs of different ferry users where feasible. This sentiment underscores a broader desire to make ferry services more accessible and affordable, particularly for those who rely on them as an integral part of their daily lives.

Environmental sustainability emerged as a shared theme among participants, with calls for reducing carbon emissions and integrating sustainable practices. This included enhancing public transit connections and supporting travel options

that do not require use of a personal vehicle, reflecting a growing environmental consciousness and desire for a more integrated transportation network.

Regional differences in priorities were evident. Community members from the Sunshine Coast and Northern Gulf Islands emphasized the essential role ferries play in transportation, prioritizing basic service delivery over luxury or tourist-focused amenities. Meanwhile, key interest-holder groups (such as tourism associations and regional districts) highlighted the necessity of long-term strategic planning, encompassing emerging transportation trends and addressing issues related to staff, such as competitive wages and career advancement opportunities.

The overarching sentiment we heard through the engagement process was a blend of frustration with service reliability and availability and an optimistic outlook on the potential for change. Participants are calling for more transparent communication, strategic investment in infrastructure and the workforce, and a management approach that is more responsive to employee and community needs. The themes of the feedback pointed to:

1

**THE SUPPORT TO ALIGN OPERATIONAL IMPROVEMENTS
WITH LONG-TERM STRATEGIC GOALS.**

2

**THE IMPORTANCE OF ENGAGING WITH, EDUCATING AND
UNDERSTANDING THE UNIQUE NEEDS OF DIFFERENT COMMUNITIES.**

3

**THE IMPERATIVE TO EMBRACE INNOVATION AND SUSTAINABILITY AS
BC FERRIES PLANS FOR LONG-TERM INVESTMENT IN THE SYSTEM.**



RECONCILIATION

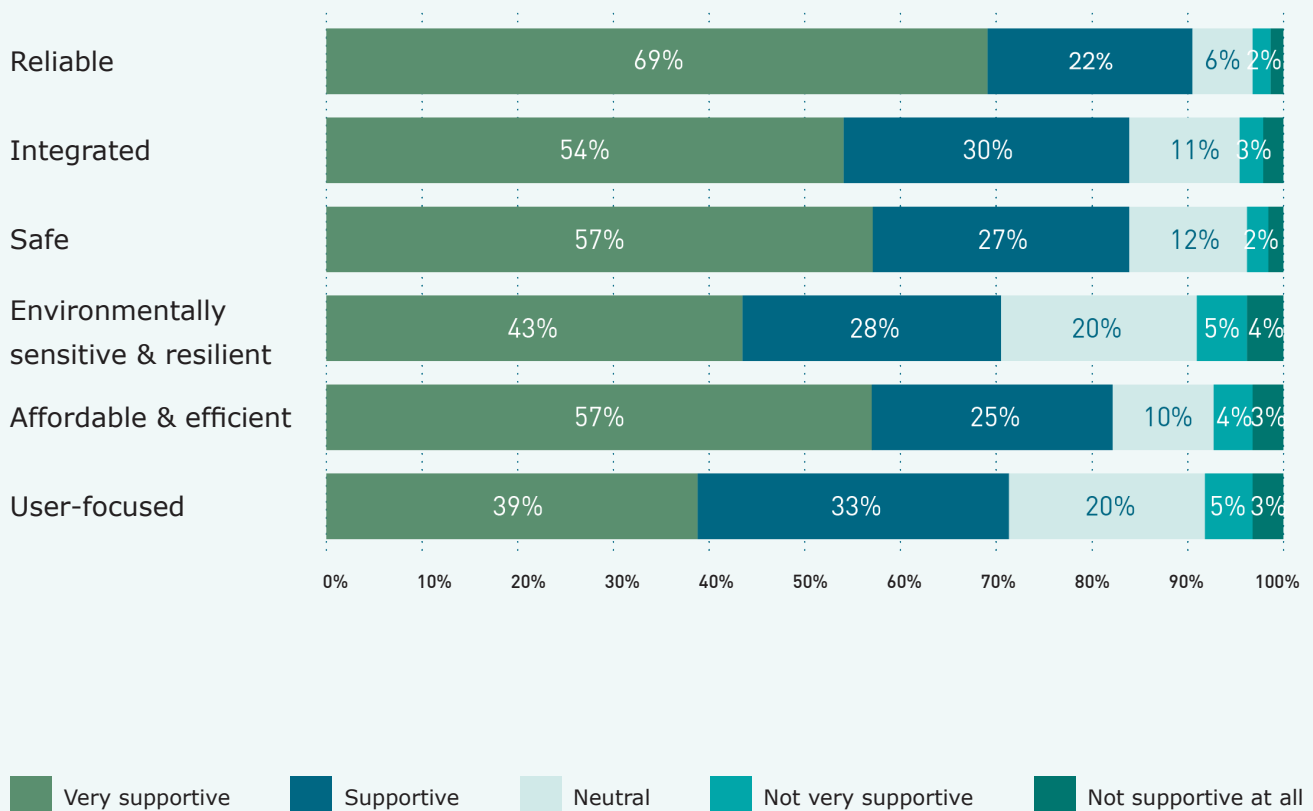
The entire coastal ferries system operates within First Nations' traditional territories as it both provides an essential service and impacts these territories. BC Ferries sails through and operates on the territorial waters and lands of more than 80 First Nations. Fall engagement results emphasized that it is critical to consider our role in advancing reconciliation within the coastal ferries system. After listening and carefully considering the feedback we received, reconciliation will be positioned as a strategic lens, underpinning the strategies and actions of the vision. This approach builds on the continued engagement for this project guided by the broader strategic goals for Indigenous relations for BC Ferries:

- + Establishing mutually respectful relationships with First Nations who have historical ties to lands and waters where BC Ferries operates
- + Proactively supporting recognition of local First Nations culture on vessels and in terminals
- + Fostering internal cultural awareness and capacity-building to support meaningful engagement with First Nations
- + Supporting project-based engagement and information sharing with First Nations
- + Seeking economic participation of First Nations through the operations of BC Ferries

Goals and Objectives

During Fall engagement, respondents were asked to rank, comment on and indicate their support for our six proposed long-term goals. The support was overwhelming – all areas were endorsed by at least 7-in-10 respondents. The support ranged from a low of 72% (user-focused) to a high of 91% (reliable).

Based on this feedback, these goals strongly reflect principles the public agrees BC Ferries should be using to build a foundation for the future of the coastal ferry system. The following graph provides an overview of the levels of support for each goal:



Modest updates to the goals and objectives were made in response to the feedback received from the public, interest holders, partners, Indigenous communities and BC Ferries' staff:

- **Reliable Goal:** added 'availability' to reflect feedback that ferries need to not only run reliably, but be available for use when needed
- **Safe goal:** expanded the goal to include 'comfortable' to recognize that safety and comfort often exist along a spectrum
- **Environmentally sensitive & resilient:** expanded the goal to address feedback on the need for broader environmental action
- **User focused:** removed this goal, as the purpose was not well understood and the objectives were better positioned under other goal headings

The updated goals and objectives are provided in the table below:

GOALS: THE COASTAL FERRY SYSTEM IS	RELIABLE & AVAILABLE	AFFORDABLE & EFFICIENT	SAFE & COMFORTABLE	CONVENIENT & INTEGRATED	ENVIRONMENTALLY SENSITIVE & RESILIENT
	Meets the essential needs of ferry users	Provides affordable fare choices across the ferry system	Is safe for all customers and staff	Is planned with communities and supports regional, economic and tourism strategies	Supports government GHG reduction targets by decarbonizing and prioritizing transit and active modes
	Meets the needs of users during peak periods	Is cost effective in its delivery of benefits to customers and the public	Provides comfortable journeys	Is integrated into the wider transportation system to make it convenient to walk, roll or take transit	Is resilient to the effects of natural disasters and climate change
	Supports the efficient movement of commercial goods and services	Is financially sustainable and resilient to changing market and economic conditions	Is accessible to passengers of all abilities	Has information, ticketing and trip planning services that are convenient and easy to use	Supports emergency response to wildfires, seismic and climate-related events
	Operates reliably		Is a good neighbour and supports safe communities		Minimizes ecological impacts

Near-Term Actions Underway

Charting the Course will provide a vision for the coastal ferry system that keeps people, goods, and services connected in coastal communities. BC Ferries acknowledges its current issues and is taking concrete measures to address them. The following overview includes examples of some of the work BC Ferries is undertaking to achieve the goals and objectives and to address operational challenges.

GOALS	ACTIONS TAKEN TO DATE
RELIABLE & AVAILABLE	WORKER RECRUITMENT - Re-opened wage negotiations early with the union, with a proposed increase retroactive to October 1, 2023. The decision is pending - Improved shift patterns to support work-life balance - Enhanced offerings for casual and seasonal staff to provide financial stability and scheduling certainty - Improved benefits for exempt staff to align with best practices - Completed exempt compensation review to ensure salaries are competitive with the market and implemented more transparent compensation practices - Hired an additional 1,059 employees in the last 12 months and approximately 400 more new staff planned to start prior to end of June SERVICE - From April–December 2023, our system carried 18.4 million passengers and 7.6 million vehicles, an increase of 5% and 2%, respectively, compared with the same period in 2022 - Increased service up and down the coast, most significantly between Gabriola Island and Nanaimo Harbour, where 63,000 more vehicles moved compared with 2019 (a 17% increase), and introduced a higher frequency two-ship service - Focused maintenance and hiring activities to ensure 98.4% of all scheduled sailings proceeded as planned, with 85% of

	those departing on time or within 10 minutes of the schedule • Provided additional service frequency and capacity for customers, including committing to more than 9,000 additional round trips • Increased frequency for those travelling between Salt Spring Island and Swartz Bay, Vancouver Island and Denman Island, Denman Island and Hornby Island, and Cortes Island and Quadra Island • Over the past year, spent \$136 million to ensure vessel technology availability above 99.5% • Improved service – in the third quarter of 2023 – 2024 fiscal, carried 4.8 million people, up 5% from the previous year INVESTMENT • In the calendar year 2023, BC Ferries invested approximately \$36 million in existing vessel upgrades, \$28 million in terminal infrastructure, and \$35 million in supporting technology. • Procuring four new Island Class vessels for entry into service by 2027 to help address demand as well as improve customer service, and contribute to safe and reliable service • Building up to seven new major vessels to replace up to six existing major vessels that are nearing their end-of-life for service on the busiest routes between Vancouver Island and Metro Vancouver
AFFORDABLE & EFFICIENT	• Avoided a necessary 9.2% increase in fares due to receiving \$500 million from the B.C. government • Introduced complimentary reservations on bookable routes for British Columbians who must travel for medical reasons by ferry to help ensure they get to and from medical specialist appointments not available in their communities
SAFE & COMFORTABLE	• Introduced complimentary customer Wi-Fi to 13 additional terminals (bringing the total to 21 terminals), with support from the B.C. government

	• Updated the food and beverage facility and menu offering at the Lands End Cafe at Swartz Bay • Engaged with staff and taking early action on recommendations supporting safety and employee well-being • Conducted “Be More than a Bystander” training to address bullying in the workplace • Created more opportunities for employees to move into deck and engineering and into senior operational roles
CONVENIENT & INTEGRATED	• Working with the B.C. government, TransLink and BC Transit to improve the travel experience for those not using personal vehicles, including by: ◦ Assessing opportunities to improve bus waiting areas at Swartz Bay and Tsawwassen terminals ◦ Identifying signage and infrastructure improvements for cyclists accessing major route ferry terminals ◦ Cross-promoting services across the three organizations’ websites for easier integrated trip planning ◦ Improving transit-ferry schedule alignment ◦ Assessing longer term opportunities for enhanced integration • Surveyed BC Ferries’ passengers to understand how to increase use of transit, ride share or bicycling • Launched a new app to make bookings, manage trips and check-in seamlessly at the terminals, used by hundreds of thousands of customers
ENVIRONMENTALLY SENSITIVE & RESILIENT	• Increased the use of renewable fuels and displaced a significant quantity of fossil fuels, including 4.6 million litres of renewable diesel and 6.3 million litres of biodiesel blends to avoid over 14,000 tonnes of CO2 emissions in 2022 – 2023 • Procuring four new hybrid-electric vessels that will support our goals of being efficient and environmentally responsible while reducing annual GHG emissions by approximately 10,000 tonnes of CO2 equivalent

Areas of Work to Complete the Vision

The strong support for the goals and objectives we received during the *Charting the Course* engagement process provides a strong basis for the public's interest in the future of coastal ferries and can be used as a foundation to guide service delivery and future investments. We are exploring several key policy areas that align with priorities identified through the engagement, including:



Service levels



Integration of ferry services into the wider transportation network, including transit



The role of coastal ferries in the movement of goods



Approach to pricing and demand management



Approach to GHG emissions reductions

SERVICE LEVELS

Guidelines are needed for appropriate customer expectations about service availability and reliability across the system. As B.C.'s population continues to grow and demand for ferry services increase, these guidelines will help us identify the strategies, actions, capacities and investments that will be required in the future to meet public needs.

While the engagement process identified reliability and availability of ferry services as a top priority, it must be weighed against other objectives such as affordability. Demand for sailings varies greatly across seasons and routes, so striking a balance between providing a high level of service to meet peak demand with the costs of new ships and crews has major implications for system costs. Setting service guidelines that appropriately balance reliability, availability, affordability and other goals is an important aspect of aligning with the public interest.

INTEGRATION OF FERRY SERVICES INTO THE WIDER TRANSPORTATION NETWORK

The majority of ferry customers on most of our routes travel by private vehicle due to many factors, including remote terminal locations that are well-served by road networks, purpose of travel, and a lack of alternatives. However, the engagement process confirmed that integrating ferry services with other travel modes (such as affordable and convenient transit, and active transportation) is a key goal for our vision. This work is further supported by the provincial *CleanBC Road Map to 2030* that sets ambitious targets for increasing walking, biking, rolling and transit, as well as reducing vehicle use.

Some areas we are exploring include improving the customer experience for walk-on passengers through better waiting areas and safer connections; more competitive travel times through improved transit connections and transit priority; incentivizing sustainable modes through pricing and products; and using passenger-only ferries at more centrally located terminal locations.

THE COASTAL FERRIES SYSTEM'S ROLE IN THE MOVEMENT OF GOODS

The ferry system moves a wide variety of cargo, including essential items, just-in-time deliveries, food, dangerous goods and livestock. Some communities depend on ferries for goods, while for many others it is an economic driver. BC Ferries moves an estimated \$8 billion in cargo each year, which is supplemented by private operators.

BC Ferries is looking at how the movement of goods interacts with other ferry services and how it should be accommodated to meet the public interest. Some areas we are considering include:



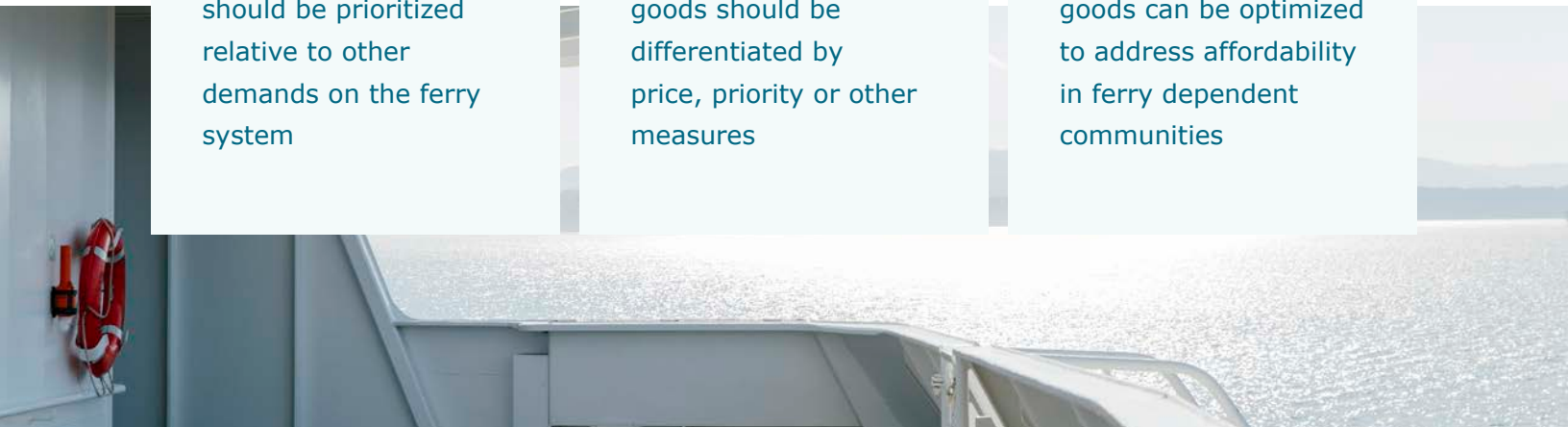
How goods movement should be prioritized relative to other demands on the ferry system



How categories of goods should be differentiated by price, priority or other measures



How the movement of goods can be optimized to address affordability in ferry dependent communities



PRICING AND DEMAND MANAGEMENT

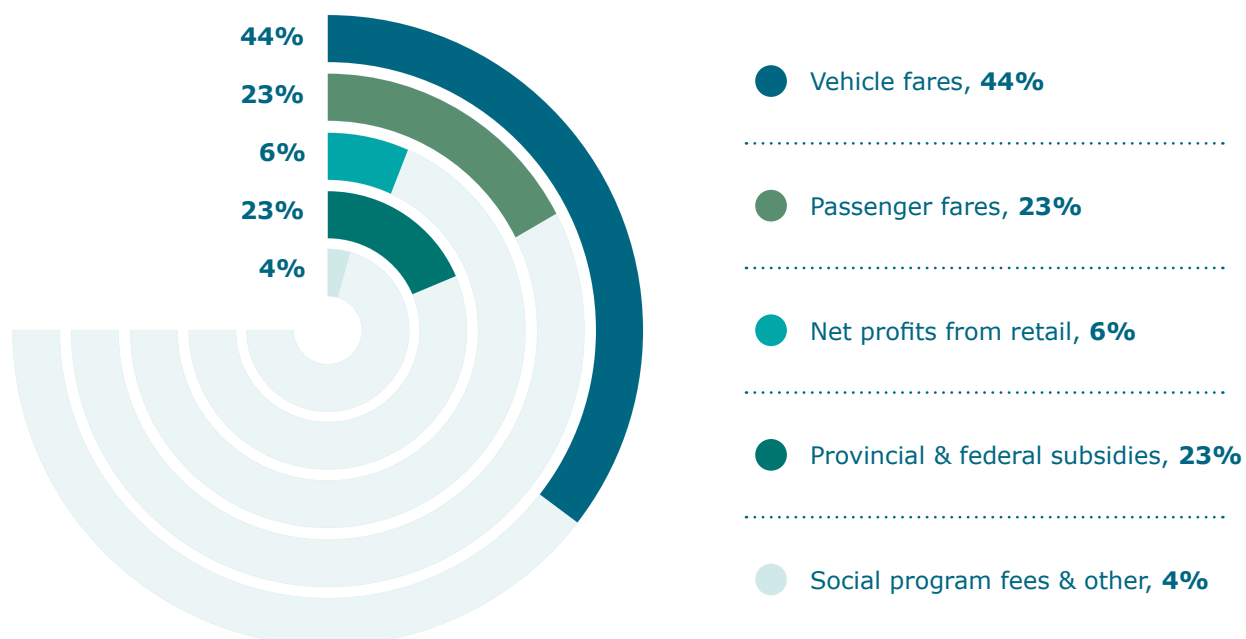
Demand for ferries fluctuates significantly depending on season, day of the week, time of day and direction in which ferries are sailing. Expanding availability at peak times can be very expensive and have negative impacts on the affordability of the service. BC Ferries, like other transportation providers, uses reservations, pricing and customer information to improve certainty for customers, reduce queueing and make use of available space as efficiently as possible. Our vision will provide guidance on how pricing and demand management tools can be improved to spread the demand towards less busy times, services, modes and routes so that we can better meet the needs of customers and support our broad goals and objectives.

TARGETS FOR GHG EMISSIONS REDUCTIONS

The provincial government has mandated GHG reduction targets and is developing the *Clean Transportation Action Plan* to implement them. We are exploring how to best support these targets, in part because adopting programs to reduce GHG emission can take time to implement and have high costs. How these costs are addressed and their impact on affordability are key considerations.

FUNDING

Service provided by BC Ferries is funded by two main sources: revenue from customers and from governments (see Figure 1). All revenues from BC Ferries operations are reinvested into the system to support day-to-day operations, train and develop crew, upgrade terminals and vessels, and replace equipment.





Recent years have seen ridership grow significantly on coastal ferries. However, as experienced in other parts of the transportation sector as well as other sectors, both capital and operating costs have also risen sharply. This presents major challenges for the system due to limited revenue sources and limits on fare increases. In addition, the few routes that generate positive earnings – thanks to high ridership levels and larger vessels – must subsidize operations and service levels across all other routes.

Every four years, BC Ferries makes a submission to the BC Ferry Commissioner that sets out projected operating and

investment needs and costs. This includes everything from labour and fuel – the two largest annual costs – to the investments required to keep the ships and terminal infrastructure safe and running well. The Commissioner is responsible for setting fares that balance the interests of ferry users and taxpayers, and the financial sustainability of BC Ferries.

Long-term financial sustainability to deliver a safe, reliable and sustainable ferry service across the diverse routes and regions requires support from all partners to balance investments in people, new vessels, terminal and enabling technology systems. Recognizing the importance of reliable and affordable ferry service, BC Ferries was able to avoid a 9.2 per cent fare increase thanks to a \$500 million investment from the B.C. government to help keep fares more affordable over the next four years. This is in addition to the approximately \$247 million provided annually.

The Fall engagement confirmed that reliability is one of the public's top goals. With no less than 12 ferries approaching the end of their life and significant aging infrastructure in need of rebuilding or replacement over the next decade, investments in our infrastructure are critical to meeting the needs of a fast-growing population.

Making these required investments while keeping fares as affordable as possible is a challenging balancing act. Many respondents in the engagement process asked for additional services or features that will require tradeoffs, new revenue sources, or both. Keeping fares affordable, confirmed through this engagement as another top priority, may limit the options available for funding continuous improvements.

ADDITIONAL TOPICS

To advance the full suite of goals and objectives, we are looking at additional policy areas, including:

- + Passenger, public and employee safety
- + Efficiency improvements
- + Comfort and customer amenities
- + Accessibility for passengers of all abilities
- + Integrated planning with communities and agencies
- + Information and technology
- + Minimizing ecological impacts of ferries



Work in these areas is supported by forecasting the effects of population and employment changes, digitization of services, automated and connected vehicles, tourism and policy directions from governments on coastal communities and, in turn, coastal ferry services.



Next Steps

FURTHER ENGAGEMENT

The next phase of engagement will focus on assessing policy considerations with service delivery partners, such as BC Transit and TransLink, local and provincial governments, community representatives, Indigenous communities, and interest holders, such as other transportation providers and community associations. Virtual workshops will be held to help us understand each of these sectors' perspective on proposed directions and continue to build relationships to ensure successful delivery of our vision.

The policy areas and priorities will be explored and refined with support from partners and interest holders. Work will then focus on prioritizing strategies and actions, including costing, to help enable the start of delivering on the vision's goals and objectives. The vision is expected to be released early in 2025.



Charting the Course

A VISION FOR COASTAL FERRIES

Appendix

Fall 2023 Engagement Report

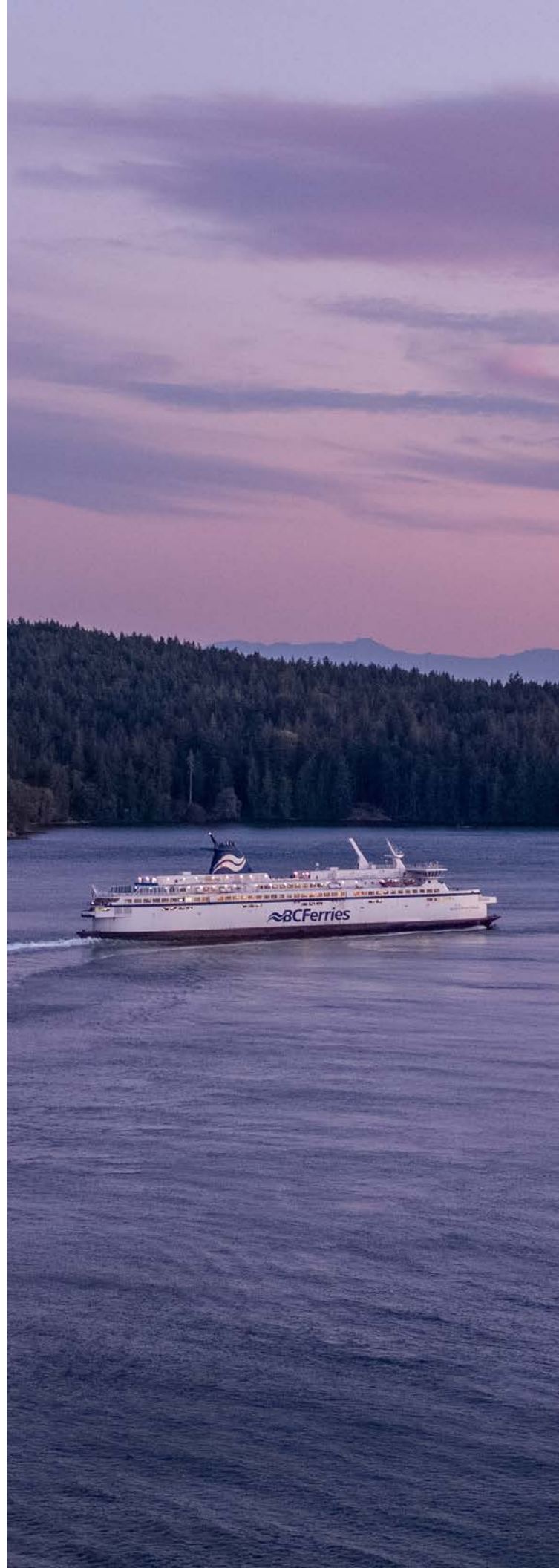
Acknowledgement

BC Ferries acknowledges and respects the territories of Indigenous Peoples on whose beautiful lands and waters our ships, offices, terminals, and work sites operate along the Pacific West Coast.

Thank you

Thank you to everyone who completed the survey, attended a workshop and shared feedback on this project. We appreciate your time and value your input as we continue to advance this important work.

This report was developed by



About the project

Charting the Course is an initiative by BC Ferries aimed at creating a vision for how to reshape and enhance the coastal ferry service in British Columbia in a way that meets public needs and expectations and acknowledges global and local trends and challenges. This project is both a response to immediate needs and a transformation guide towards a sustainable and resilient future for ferry services now and into the future.

The world's transportation systems, including BC's coastal ferries, are facing pressures due to factors like pandemic recovery, climate change, technological advancements, societal shifts, labour force changes, rising maintenance costs and other inflationary pressures, and population growth. BC Ferries acknowledges these challenges and is committed to taking proactive steps to address current operational issues while also focusing on long-term strategic planning.

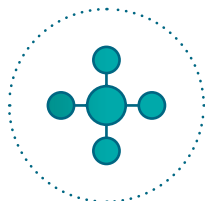
Charting the Course objectives:



To create a flexible and future-proof roadmap for the coastal ferry system that anticipates and adapts to long-term trends in population growth, affordability and cost pressures, technological innovation, societal shifts, the labour force, and environmental changes and expectations.



To engage a broad spectrum of interest holders, including our passengers, our people, local communities, Indigenous communities, government bodies, and others in a dialogue that helps create a vision of the future of coastal ferry services.



To ensure the coastal ferry service remains a valued, sustainable and integrated component of British Columbia's extensive transportation network, adapting to new ways of travelling and other technological shifts.

The goal of *Charting the Course* is to establish a vision for a sustainable, resilient and forward-thinking ferry system that not only addresses today's challenges but is also well-prepared for the future. This involves understanding and integrating community insights to shape services and policies that resonate with the evolving needs of passengers, our people and the communities we serve.

ENGAGEMENT OVERVIEW

This phase of engagement was held from November 8th to 28th, 2023. It included a comprehensive online questionnaire and a series of targeted meetings with key interest holders. The online questionnaire, accessible via BC Ferries' dedicated project website and promoted through digital channels and earned media, provided an easy and convenient platform for the public and BC Ferries' staff to voice their priorities, preferences, and insights. It was designed to capture a wide array of perspectives and give participants the opportunity to contribute to the future vision of the coastal ferry system.

Simultaneously, several interest-holder meetings were held, bringing together representatives from Indigenous communities, coastal communities, local and regional governments, and sectors like tourism and commerce. These meetings facilitated in-depth discussions, allowing interest holders to delve into specific issues and opportunities, and to offer detailed feedback and suggestions. This multifaceted approach not only broadened BC Ferries' understanding of the community's needs and aspirations but also laid a solid foundation for the subsequent phases of this key initiative.



Promotion and outreach

To ensure as many people as possible were made aware of this engagement opportunity, BC Ferries promoted the project through various channels and platforms. This included social media, direct outreach to local communities, on vessels and through traditional media.

Engagement promotion and outreach for internal audiences of BC Ferries included:



BCF EMPLOYEE INTRANET AND PUBLIC WEBSITE: WEBSITE AND INTRANET CONTENT DESCRIBING AND DIRECTING TO THE ONLINE ENGAGEMENT.



EMAIL OUTREACH: PROMOTION OF THE ENGAGEMENT TO INTERNAL MAILING LISTS.



POSTERING: PRINTED MATERIALS DISTRIBUTED TO BREAK ROOMS AND STAFF HUBS DIRECTING TO THE ONLINE ENGAGEMENT.

Engagement promotion and outreach to interest holders and the public included:



SOCIAL MEDIA: POSTS AND STORIES PREPARED FOR TWITTER / X, LINKEDIN, FACEBOOK, AND INSTAGRAM, PROVIDING TIMEFRAMES, AWARENESS, AND DIRECTION TO THE ONLINE ENGAGEMENT.



TERMINAL & VESSEL SCREENS: DIGITAL SLIDES PREPARED FOR MULTIPLE TERMINAL AND VESSEL DISPLAY SCREENS ACROSS BC FERRIES' ROUTES, PROVIDING QR CODE DIRECTION TO THE ONLINE ENGAGEMENT.



VESSEL DECALS: PRINTED DECALS PROVIDED TO MULTIPLE BC FERRIES VESSELS, SHOWCASING QR CODE DIRECTION TO THE ONLINE ENGAGEMENT.



MEDIA: MULTIPLE ARTICLES AND INTERVIEWS WITH VARIOUS MEDIA OUTLETS WHICH MENTIONED AND LINKED TO THE ONLINE ENGAGEMENT.



WEBSITE: DIGITAL TILE ON BCFERRIES.COM HOME PAGE.



ONBOARD E-NEWSLETTER: E-NEWSLETTER TO +250,000 SUBSCRIBERS.

Additionally, the online engagement and outreach materials were supported with a shareable promotional toolkit, which contained multi-channel outreach materials, an FAQ document, and instructions for interest holders to promote the engagement across their own channels.

With a total of 25,900 visits to the online engagement and 9,366 surveys completed, promotion and outreach metrics were as follows:

CHANNEL	DESCRIPTION	SITE VIEWS	PARTICIPANTS
Social Media	All traffic from Twitter / X, LinkedIn, Facebook, and Instagram	5,777	834
Direct Traffic	All traffic based on embedded links to the engagement, across media mentions and email lists	13,271	7,133
Email Traffic	Traffic generated from email lists directly connected to EngagementHQ	367	56
Search Engine Traffic	Traffic generated from search engines	1,801	389
Referral Traffic	All traffic generated from referral links, including most third-party promotion	4,700	954

Who we heard from

The engagement process was designed to hear from people in every community served by BC Ferries, creating a safe space for people to learn about the project, ask questions and feel heard. A variety of opportunities for people to participate were provided, including an online public survey and key interest-holder meetings and workshops. The section provides an overview of who participated in the interest-holder meetings and workshops and a summary of what they said.

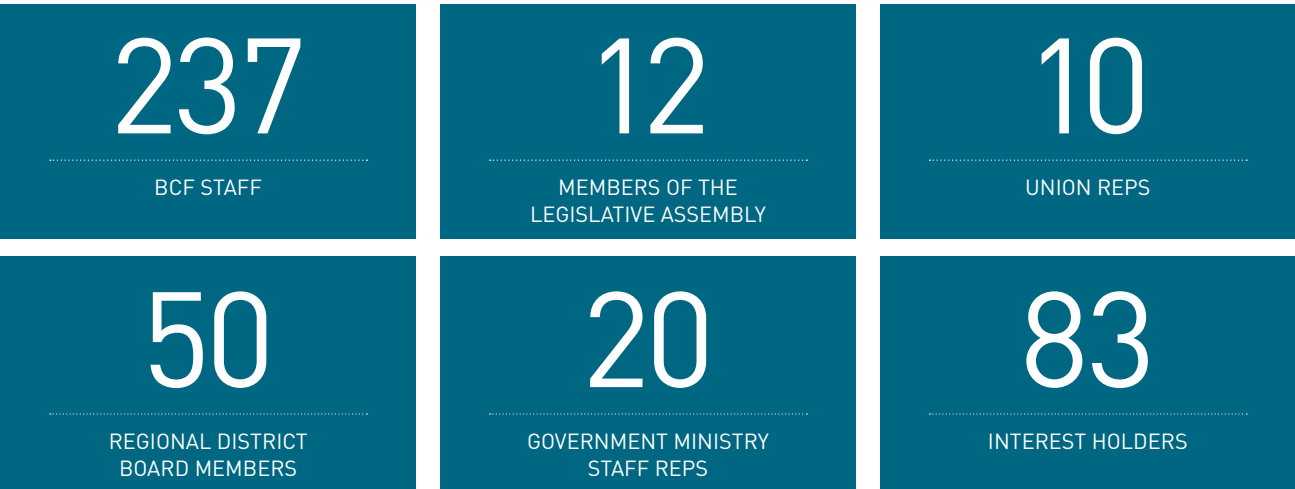
INTEREST-HOLDER WORKSHOP OVERVIEW

We held a series of meetings with key interest-holders across the province. This included:

NUMBER OF MEETINGS OR WORKSHOPS



NUMBER OF ATTENDEES



Below, we have included a list of the organizations and local governments we met with.

Business associations

- BC Sustainable Energy Association
- Comox Valley Chamber of Commerce
- Cortes Community Economic Development Association
- Gabriola Island Chamber of Commerce
- Gastown Business Improvement Society
- Ladysmith Chamber of Commerce
- Mayne Island Chamber
- Nanaimo Chamber of Commerce
- Nanaimo Hospitality (Hotel) Association
- Pender Island Chamber of Commerce
- Prince Rupert and District CoC
- Rural Island Economic Partnership (RIEP)
- Saanich Peninsula Chamber of Commerce
- Tofino Business Association
- Vancouver Island Economic Association

Trade and commercial sector

- BC Aviation Council
- BC Trucking Association
- Vancouver Island Construction Association

Accessibility groups and advocates

- Alberni Island Shuttle Bus
- Capital Bike
- Hub Cycling
- Quadra Island Climate Action Network
- Quadra Island Emergency Program
- Strathcona (Regional District)
- Transportation Choices Sunshine Coast (TRACS)

Civic organizations and schools

- Bowen Island Community School
- Delta Fire & Emergency Services
- Delta Police Department

Regional tourism associations

- 4VI (formerly Tourism Vancouver Island)
- Cariboo Chilcotin Coast Tourism Association
- Comox Valley Airport
- Destination Greater Victoria
- Destination Vancouver
- Parksville Qualicum Beach Tourism Association
- Port Hardy Tourism Advisory Committee
- Sunshine Coast Tourism
- Tourism Bowen Island
- Tourism Industry Association of BC
- Tourism Nanaimo
- Tourism Powell River

BC Ferry Advisory Committees

BC Ferries' People

Members of Legislature Assembly

TransLink and BC Transit staff

Regional districts and municipalities

- Bowen Island Municipality
- Capital Regional District
- City of Campbell River
- City of Powell River
- City of Prince Rupert
- Cowichan Valley Regional District
- District of Lantzville
- District of Port Hardy
- North Coast Regional District
- qathet Regional District
- Town of Comox
- Village of Cumberland
- Village of Daajing Giids
- Village of Port Clements

Workshop and meetings summaries

INTEREST-HOLDER WORKSHOPS SUMMARY

This summary combines feedback from all of the interest-holder groups who participated in this phase of engagement, except for MLAs and BC Ferries' people (this feedback is summarized next), because there were many consistent themes across all groups. Feedback from interest-holders in ferry-served communities highlights a dynamic mix of shared concerns and unique priorities, underscoring the ferry system's pivotal role in British Columbia's connectivity and growth. A common thread across all groups is the urgency for increased capacity and frequency of ferry services, addressing the immediate challenges that have an impact on operations, such as staffing, funding, and efficiency, and enhancing safety and accessibility. This consensus reflects a collective recognition of the critical role of the ferry system in BC's transportation network and its impact on community connectivity.

However, differences emerge in prioritizing these needs. The Ferry Advisory Committee Chairs and regional districts emphasized the importance of aligning ferry services with local and Indigenous communities' unique needs, suggesting a more community-centric approach, while trade and commercial associations were focused on integrating ferry services with broader transportation modes and prioritizing commercial traffic. Regional tourism stakeholders stressed need for the ferry service reliability and punctuality which is so vital for tourism and local economies, and highlighted the need for environmental sustainability.

Business associations and accessibility groups called for a ferry system that is reliable, resilient, and accessible to all, including those with disabilities. They emphasized the integration of ferry services within the larger transportation ecosystem and the adoption of advanced technologies, such as the electrification of vessels. Meanwhile, school boards, municipal governments, and health authorities highlighted the importance of the ferry system in supporting regional growth strategies and emergency response.

The regional districts uniquely stressed the need for employee retention and training, reflecting the localized challenges in smaller communities. They also called for equitable service for Northern routes, highlighting a perceived geographical disparity in focus and resources.

A layer of regionality adds depth to the broader themes. Smaller and more isolated communities, such as those on the North Coast, emphasized the need for ferry services that cater to their unique connectivity needs, highlighting the importance of context-sensitive strategic planning. Workforce challenges, particularly in areas of staff retention and training, are more pronounced in these regions. People also emphasized the critical role ferries play in supporting medical travel. The degree of integration of ferry services with other modes of transit also varies across different regions, reflecting the diversity in local transportation systems. There is also a notable emphasis on inclusive hiring practices, aiming to better represent equity-deserving and Indigenous communities within the broader transportation system.

MEMBERS OF LEGISLATURE ASSEMBLY (MLA) FEEDBACK SUMMARY

There's a shared recognition among MLAs for the need of services that are both affordable and reliable, a sentiment echoing the universal demand for transportation that is accessible to all. Common concerns also included a strong focus on safety, particularly in terms of improving terminal infrastructure and emergency response efforts. Additionally, there's agreement among the MLAs who provided feedback on the importance of steering the ferry system towards environmental sustainability, coupled with an enthusiasm for embracing modern technologies like improved WiFi connectivity and readiness for future transportation shifts, such as the integration of electric vehicle chargers on vessels.

SUMMARY OF FEEDBACK FROM BC FERRIES' PEOPLE

The feedback from BC Ferries' people reflected both future aspirations and current challenges. Employees and Union representatives highlighted the need for a sustainable and realistic funding model, crucial for supporting future developments and operational efficiency. This points to a shared understanding of the financial underpinnings necessary for long-term improvements.

The integration of ferry services with broader transportation networks, like SkyTrain and bus transit systems, is also seen as vital for creating a cohesive and efficient transportation experience.

Another subject raised was BC's aging population and individuals with limited mobility needing better supports on vessels to help them navigate to and through the terminals and vessels.



I would like to see better systems in place to support career progression. In the last two years the company has brought in many foreign [workers] to help bolster certain staffing shortages. Yet among the number of foreign [workers] the company has hired, not all of them have stayed on with the company.

By providing more support to current employees who desire to pursue higher [positions] that will help to solve those staffing shortages down the road.

- Northern Gulf Islands

BC Ferries' people raised the issues of the retention of crew members and addressing shortages, actions which are seen as vital for maintaining reliable operations. The necessity of improved succession training is also noted, underscoring the importance of preparing the next generation of staff for future challenges and opportunities within the system.

Discussions about ferry fares highlighted a shared concern for affordability, impacting not only residents but also tourists. There's a strong emphasis on improving service reliability and enhancing terminal infrastructure, aimed at minimizing delays and improving the overall travel experience.

Support for improving environmental outcomes were evident in discussions about greenhouse gas emissions reduction, including strategies like slowing vessel speeds for emissions control. Additionally, there's a need for clear and consistent

messaging about progress and timelines, suggesting a desire for transparency in how strategic visions are being implemented and communicated. Staff concerns extended to practical challenges like ensuring employee safety, especially in the context of customers expressing frustration.

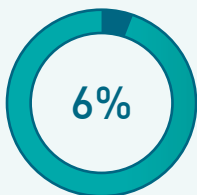
INDIGENOUS ENGAGEMENT

BC Ferries is currently engaging with Coastal Nations and Indigenous organizations in BC. Its approach to Indigenous engagement will continue throughout this process and is designed to be one where it can hear from Nations and organizations at their convenience. As of January 2024, outreach has happened with 88 Nations. Sessions for early this year have been confirmed with nine Nations, with outstanding efforts to meet with more throughout 2024.

Online engagement

Between November 8th and November 28th, 2023, BC Ferries collected feedback through an online survey. Overall, 9,366 people completed the survey. The survey results offer insights into the collective voice and priorities of ferry users across the province. These responses, crucial to shaping the strategic vision for the coastal ferry system, highlight key areas of both consensus and divergence. Throughout the responses, there are several themes that consistently came up across different questions. To be respectful of your time and to avoid repetition, we captured the most comment themes heard in the Executive Summary section at the beginning of this report.

WHO WE HEARD FROM



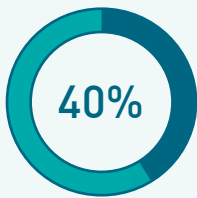
REPRESENTATION

Out of 9,366 individuals who completed the survey, 6% were people who work for BC Ferries, offering the internal perspectives and feedback. The majority of respondents were members of the public, giving a broad view of public opinion and use.



PURPOSES FOR USING THE FERRY

32% use the ferry to visit friends and family, indicating the service’s role in maintaining personal connections across the region. 25% use it for tourism and leisure, highlighting the ferry’s significance in supporting the local tourism industry. 16% use it for commuting to work, school, or business travel, underscoring its importance as a commuter service. Another 16% use it for special events or occasions, while 10% cite other reasons, reflecting the varied purposes for which the ferry service is utilized. This survey question didn’t ask about commercial use.



FERRY DEPENDENCY AND USAGE FREQUENCY

Over 40% of respondents identify as residents of ferry-dependent communities, emphasizing the coastal ferries' role as an essential service for these areas. 26% are occasional visitors to coastal communities, and 17% are regular ferry commuters, indicating diverse usage patterns ranging from essential daily travel to more sporadic leisure visits. 15% of respondents use the ferry very frequently (daily or two to three times a week), contrasting with 42% who use it once a month and 43% who use it infrequently (two to three times a year). This suggests a broad spectrum of dependency on the ferry system.

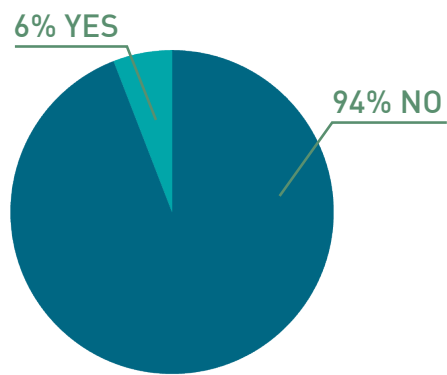


GEOGRAPHICAL DISTRIBUTION

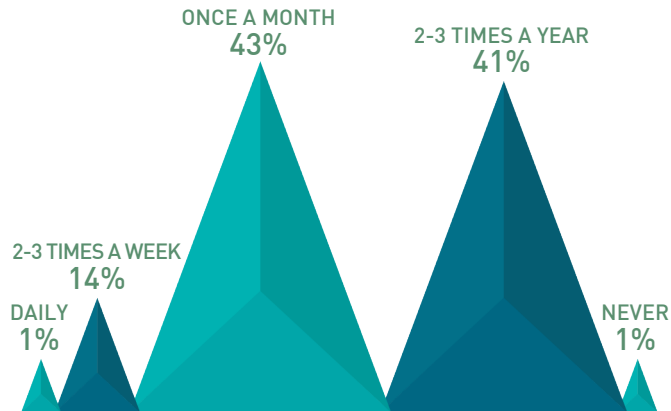
Approximately 45% of respondents are from Vancouver Island, indicating a significant portion of the feedback is coming from an area heavily reliant on ferry services. 25% of respondents live in the Lower Mainland, suggesting that a significant proportion of users are accessing ferry services from this urban area. In comparison, Vancouver Island and Coast makes up 17% of BC's total population, while the Lower Mainland – Southwest region makes up 61% of BC's total population. 10% of respondents live on the Gulf Islands, highlighting the importance of ferry services for these smaller, more isolated communities. The remainder of respondents are from smaller communities throughout BC, including Northern and Southern interior, Haida Gwaii and the Mid-coast.*

* **Mid-Coast** is the Ocean Fall, Shearwater, Bella Coola, Bella Bella, Port Hardy, Klemtu service

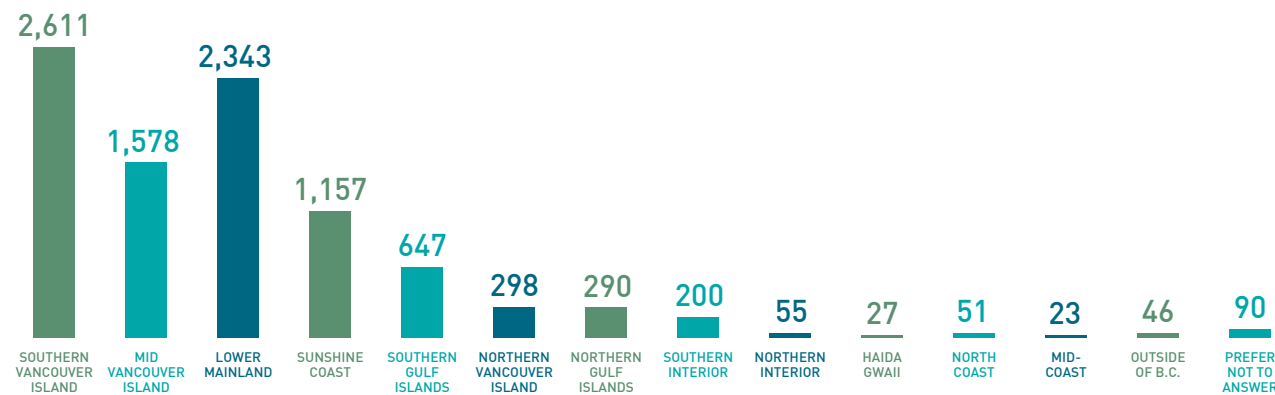
ARE YOU A BC FERRIES EMPLOYEE?



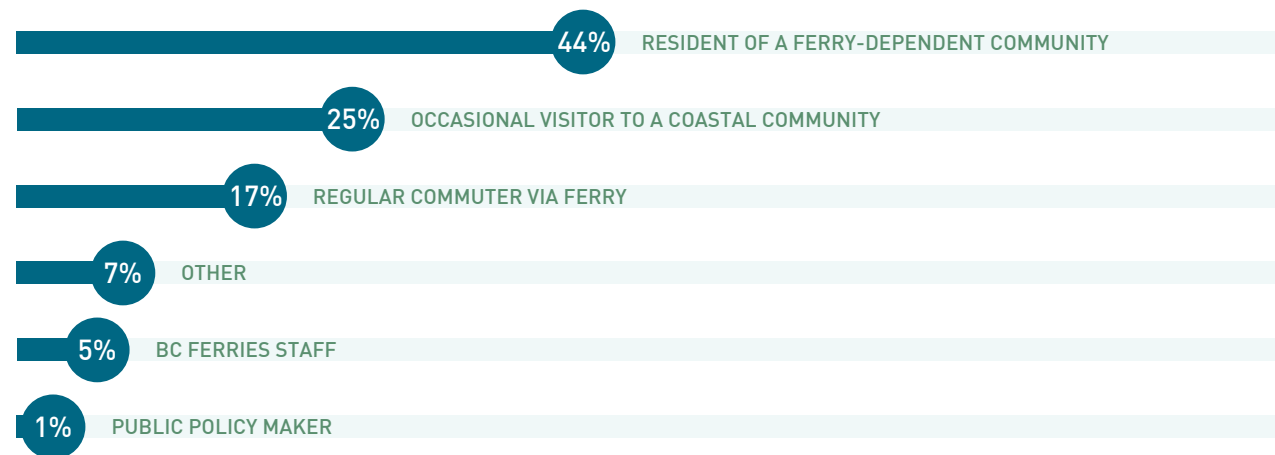
HOW OFTEN DO YOU SAIL WITH BC FERRIES?



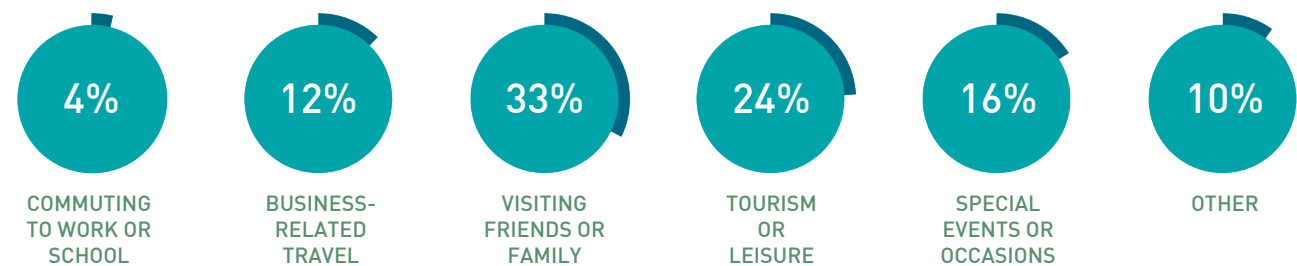
WHERE DO YOU PRIMARILY LIVE?



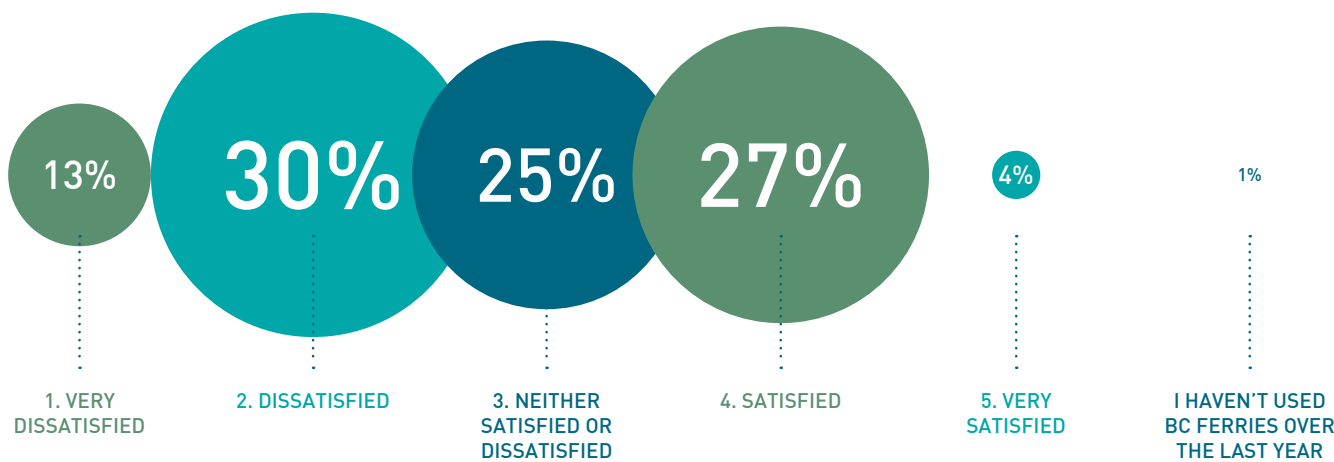
IN WHAT CAPACITY DO YOU USE THE FERRY MOST OFTEN?



WHAT DO YOU PRIMARILY USE BC FERRIES FOR? (SELECT ALL THAT APPLY)



ON A SCALE FROM 1 TO 5 (WITH 1 BEING VERY DISSATISFIED AND 5 BEING VERY SATISFIED), HOW WOULD YOU RATE YOUR OVERALL EXPERIENCE WITH BC FERRIES' SERVICES OVER THE PAST YEAR?



QUESTIONS ABOUT CURRENT EXPERIENCES AND PRIORITIES RESPONDENTS HOPE ARE ADDRESSED THROUGH THE LONG-TERM VISION

Q5: Based on your current experience, what is the top issue you hope will be addressed through this long-term vision? Please feel free to share as much or as little as you'd like. (From BC Ferries' Employees)

The sentiment expressed is one of frustration and a desire for change. Employees are calling for clearer communication, better compensation, improved work-life balance and a more supportive and fair management structure. There is a strong emphasis on the need for strategic planning and investment in both the workforce and terminal and vessel infrastructure to ensure the long-term success and sustainability of the organization. 653 comments were received. These were the high-level themes:

- Consider more competitive compensation (20% of the comments for this question):**
 A significant issue is the perceived lack of competitiveness in wages for licensed employees within the marine industry, with a growing need for wage increases to keep pace with living expenses and inflation, while an ongoing pay dispute further contributes to employee discontent.
- Help create more work-life balance and scheduling ease (15%):** The current shift scheduling system is criticized for its inability to support proper work-life balance, with other concerns raised as well, such as the need for on-call premium pay and the requirement for regular hours to facilitate professional development.
- Increase staffing (13%):** Insufficient crew levels leading to sailing cancellations and the



Put the money in the employees and buying new vessels, not renovating.

- Southern Vancouver Island

DID YOU KNOW?

BC FERRIES HAS COMMITTED TO PARTICIPATING IN WAGE NEGOTIATIONS IN EACH OF THE NEXT THREE YEARS WITH ITS UNION, ALL WITH THE GOAL OF RAISING WAGES THAT ITS PEOPLE ARE PAID.

need for improved crew hiring, training, retention, and promotion processes are identified as significant issues.

- **Create a people-centric culture and more accountability (11%):** Employees express concerns about the absence of a clearly defined people-centric culture, where specific behaviors are rewarded, leading to an inconsistent workplace culture and a lack of clarity on performance indicators and competencies.
- **Facilitate career advancement and feedback (10%):** Employees feel that there is no transparent career advancement plan in place, and they are not receiving adequate feedback on how to progress within the organization.
- **Consider affordable housing and cost of living (9%):** The high cost of living and the lack of affordable housing in B.C. significantly affects employees, and there is a call for collaborative efforts with other agencies to address these challenges.
- **Consider changes to management and employee relations (6%):** A perception of top-heavy management, nepotism, and a lack of fair treatment of employees has led to a sense of disconnect between the executive branch and day-to-day operations.
- **Introduce further recognition (4%):** Employees desire better recognition for their hard work and contributions, emphasizing the importance of promotions based on merit rather than perceived nepotism or connections, along with increased company investment in training and professional development.
- **Improve reliability and sustainability (3%):** Reliability is a major concern, encompassing both crew and vessel maintenance, with calls for more sustainable planning and management in environmental and energy use, infrastructure renewal, and ongoing maintenance.
- **Improve booking process and integration (3%):** Employees hope for a more advanced booking process and better integration with public transit to improve overall customer experience.

DID YOU KNOW?

OVER THE LAST YEAR, BC FERRIES SUPPORTED THE LARGEST RECRUITMENT EFFORT IN THE COMPANY'S HISTORY, HIRING MORE THAN 1,200 TEAM MEMBERS.

- **Focus more on strategic resource allocation (2%):** There is a need for clarity regarding the company's strategic focus, whether it revolves around transportation, serving as a vital link to coastal communities, or other objectives, along with clear direction on resource allocation and investment priorities.

Q6. Based on your current experience, what is the top issue you hope will be addressed through this long-term vision? Please feel free to share as much or as little as you'd like.

The sentiment is predominantly negative, with participants expressing dissatisfaction with the reliability, cost and capacity of the ferry service. There is a strong desire for improvements in staffing, scheduling and the reservations system to make the service more dependable and user-friendly for residents and commuters. However, there are also positive notes regarding certain amenities and the potential for environmental improvements. 8,506 comments were received. These were the high-level themes:

- **Improve reliability and reduce cancellations (25% of the comments for this question):** Prioritize enhancing ferry reliability and minimizing cancellations, especially those related to staffing shortages and mechanical issues.
- **Increase sailing frequency and capacity (19%):** Expand the number of sailings and passenger capacity, particularly during peak seasons and on critical routes, to alleviate overloads and reduce wait times.
- **Address affordability concerns (17%):** Tackle pricing issues by reducing fares, especially for residents who depend on the ferry as part of the highway system and explore options like discounts or passes for frequent travelers to enhance accessibility.
- **Address staffing stability and service consistency (9%):** Tackle staffing challenges by hiring full-time, permanent positions with stable schedules and benefits to ensure consistent service and employee retention.
- **Enhance the reservation system (7%):** Improve the user-friendliness and perceived

DID YOU KNOW?

IN THE FIRST THREE QUARTERS OF 23/24, CANCELLATIONS DUE TO CREW SHORTAGES DROPPED BY ALMOST 37% AND CANCELLATIONS OVERALL DECREASED BY 14%.

fairness of the reservation system, potentially by decreasing the percentage of reservations per sailing and ensuring availability for last-minute or emergency travel.

- **Improve communication and transparency (6%):** Enhance communication and transparency regarding sailing delays, cancellations, and availability to provide passengers with timely and accurate information.
- **Fleet modernization and local economy (4%):** Invest in new, more reliable ferries to replace the aging fleet, with consideration for local construction to support the economy and job creation.
- **Enhance the onboard passenger experience (4%):** Improve the onboard experience by offering better food options, increased seating comfort, and enhanced amenities for all passengers, including those with disabilities and cyclists.
- **Environmental sustainability (3%):** Focus on environmental performance by reducing carbon emissions, further integrating with public transit, and supporting non-vehicle travel options to minimize the ferry's ecological impact.
- **Terminal infrastructure improvements (2%):** Explore terminal infrastructure enhancements, including better bike facilities, parking solutions, and integration with land-based transit systems, to enhance the overall travel experience.



When they are operational and run on time, they do a very good job getting people on and off the Islands.

- Southern Interior

When we dive deeper into this data and look at responses based on where respondents are regionally located, we found some overarching concerns common across many regions.

Across all regions there is a critical and universal demand for reliable ferry services, where respondents reported that unreliability of services, largely due to crew shortages and mechanical issues, significantly disrupts essential travel and daily life.

Affordability is a widespread concern, with many advocating for more affordable fare structures that reflect the role of ferries as part of a highway system. Respondents from regions like Northern Vancouver Island and the Sunshine Coast specifically call for fare differentiation

between residents and tourists, emphasizing the need to prioritize local community needs over visitors.

Participants from the Southern Gulf Islands and Mid Vancouver Island are hoping to see operational improvements. There's a clear desire for schedule changes, enhanced amenities, and infrastructure upgrades to accommodate increasing demand and improve service quality. People in the Lower Mainland and Northern Interior also emphasized the need for environmental sustainability and improved integration with other transportation systems, stressing the importance of seamless and efficient travel experiences.

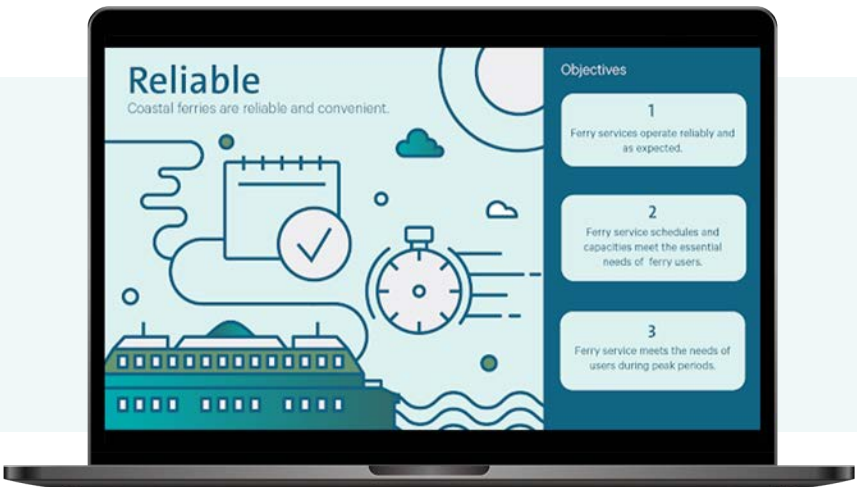
People from the Northern Gulf Islands noted dissatisfaction with customer service and the reservation system on other routes (as NGI routes are non-reservable), whereas in the Lower Mainland, the focus is on environmental performance and the necessity for terminal expansion. Participants from the Mid-Coast region place a high priority on the reliability of services. Respondents from the Sunshine Coast and Haida Gwaii express concerns about the high cost of travel and the reservation system's shortcomings, including cost, not always being able to make a reservation and not prioritizing locals.

Overall, the sentiment across these diverse regions is a call for a more responsive, community-focused, and environmentally sustainable transportation system. This requires not only addressing universal concerns like reliability and affordability but also considering the specific needs and challenges of each region to ensure that the long-term vision for a coastal ferry system aligns with the diverse needs of its users.

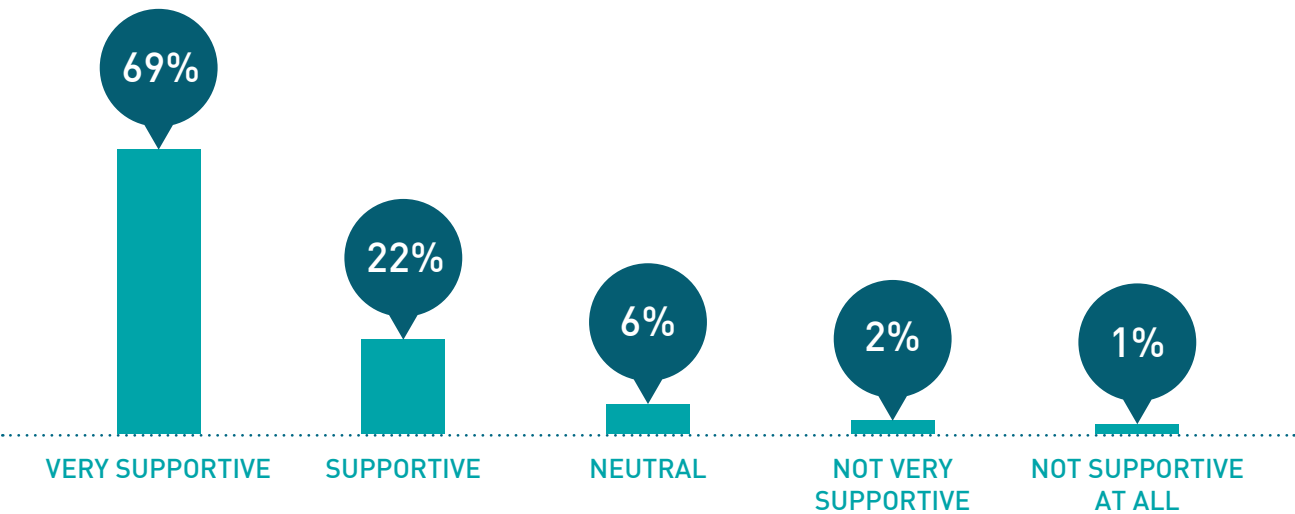


FEEDBACK ON THE VISION GOALS AND OBJECTIVES

Goal 1: Coastal ferries are reliable and convenient



Q7. How supportive are you of this goal and its objectives?



- A large majority of respondents expressed feeling supportive or very supportive of the goal and its objectives (91%).

Q8. Goal 1: Coastal ferries are reliable and convenient. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

7,277 comments were received. The overall sentiment of responses to this question was mixed, with a strong desire for improved reliability and service availability, especially during peak times. There was a notable level of frustration and skepticism regarding the current state of ferry service levels and its ability to meet the stated goals and objectives. However, there was also a sense of hope and support for the goal, provided it can be effectively implemented.

Q9. Goal 1: Coastal ferries are reliable and convenient. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

5,327 comments were received. The sentiment expressed in the comments was one of concern about the reliability of service and a desire for improvement in the ferry system's operations, with a focus on reliability, affordability, safety and environmental responsibility. There was a call for better management practices, employee support and prioritizing residents' needs. The comments from Q8 and Q9 have been summarized into the following high-level themes:

- Increase ferry service frequency and capacity (22% of the comments for this question):** Expand ferry service frequency and capacity, especially during peak times, to better meet the needs of passengers.
- Implement an affordable pricing structure (20%):** Establish a fair and affordable pricing structure, taking into account the needs of residents and essential travel.
- Streamline the reservation system (16%):** Simplify the reservation system to reduce wait times and enhance user convenience.
- Enhance staff recruitment, training, and retention (10%):** Strengthen staff recruitment, training, and retention strategies to cultivate a more reliable workforce.
- Ensure clear and timely communication (9%):** Requests for clear and timely communication with ferry users regarding capacity, schedules, and service disruptions.
- Foster better coordination with public transit systems (8%):** Promote improved coordination with public transit systems and facilitate seamless transfers between different modes of transportation.



I support anything that will make BC Ferries an essential part of the BC highway system.

- Lower Mainland

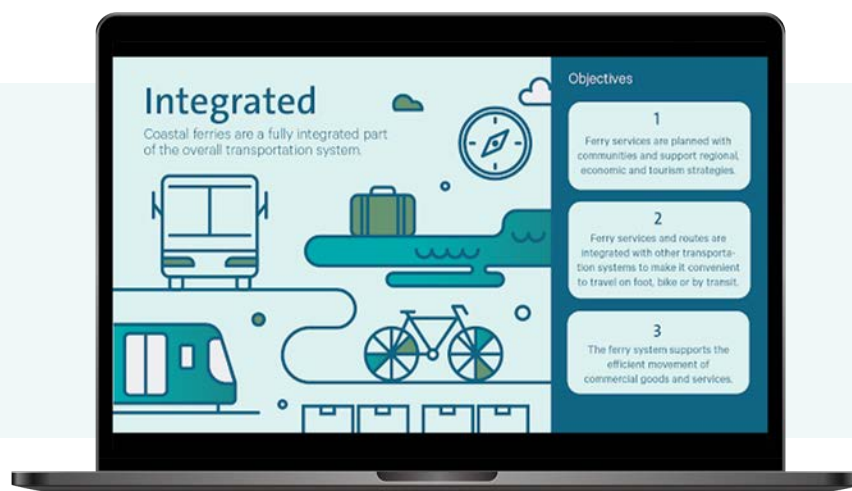
DID YOU KNOW?

BC FERRIES IS PART OF AN INTEGRATED TRANSPORTATION WORKING GROUP WITH BC TRANSIT, TRANSLINK AND THE PROVINCIAL GOVERNMENT THAT IS PLANNING FOR THE FUTURE OF INTEGRATED TRANSPORTATION IN THE REGION.

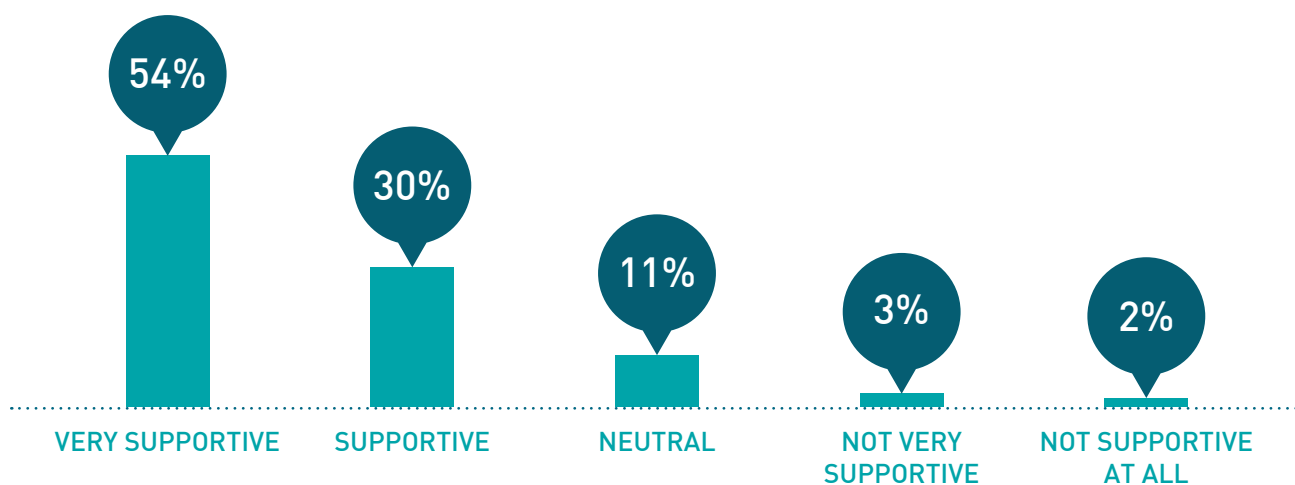
- **Prioritize safety and security for users and employees (7%):** Make safety and security a top priority for ferry users and employees within the ferry system.
- **Modernize the fleet (4%):** Upgrade the fleet with vessels that are more reliable and environmentally friendly.



Goal 2: Coastal ferries are an integrated component of a regional and provincial transportation system



Q7. How supportive are you of this goal and its objectives?



- 84% of respondents are supportive or very supportive of this goal and its objectives.

Q11. Goal 2: Coastal ferries are an integrated component of a regional and provincial transportation system. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

5,872 comments were received. Overall, the sentiment is mixed, with many supportive of the goal but skeptical about the potential of achieving it based on past performance. There is a clear demand for a coastal ferry service that is reliable, affordable, well-integrated with other forms of transportation, and responsive to the needs of local communities.

Q12. Goal 2: Coastal ferries are an integrated component of a regional and provincial transportation system. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

3,843 comments were received. While there are some positive comments about the ferry system, the broader sentiment leans towards a desire for improved integration with other modes of transportation, more affordable and reliable services, better communication and planning, and a focus on the needs of residents and communities. There is also a call to pay more attention and consideration to minor routes and ferry-dependent communities. The comments from Q11 and Q12 have been summarized into the following high-level themes:

- Offer reduced rates for island residents to support affordability (23% of the comments for this question):** Provide discounted rates for island residents to support the local communities and make travel more affordable.
- Increase staffing to reduce service disruptions (20%):** Boost staffing levels to minimize service disruptions and improve overall operational efficiency.
- Enhance integration of ferry services with regional and provincial transportation systems (17%):** Improve the integration of ferry services with regional and provincial transportation systems, including the construction of new Skytrain stations and the addition of more bus, shuttle and car share options.
- Incorporate smaller routes into the long-term strategy (12%):** Include smaller routes in the long-term strategy to ensure comprehensive ferry service coverage.



Working with transit authorities to ensure bus travel aligns better with ferry schedules on the gulf island routes is important.

- Southern Vancouver Island

DID YOU KNOW?

BC FERRIES HAS SIGNED A CONTRACT TO HAVE FOUR NEW ISLAND CLASS FERRIES ADDED TO THE FLEET BY 2027, WHICH WILL ADD RELIABILITY AND FLEXIBILITY TO THE SYSTEM SO PASSENGERS CAN HAVE BETTER CONFIDENCE THEY'LL GET WHERE THEY NEED TO BE.

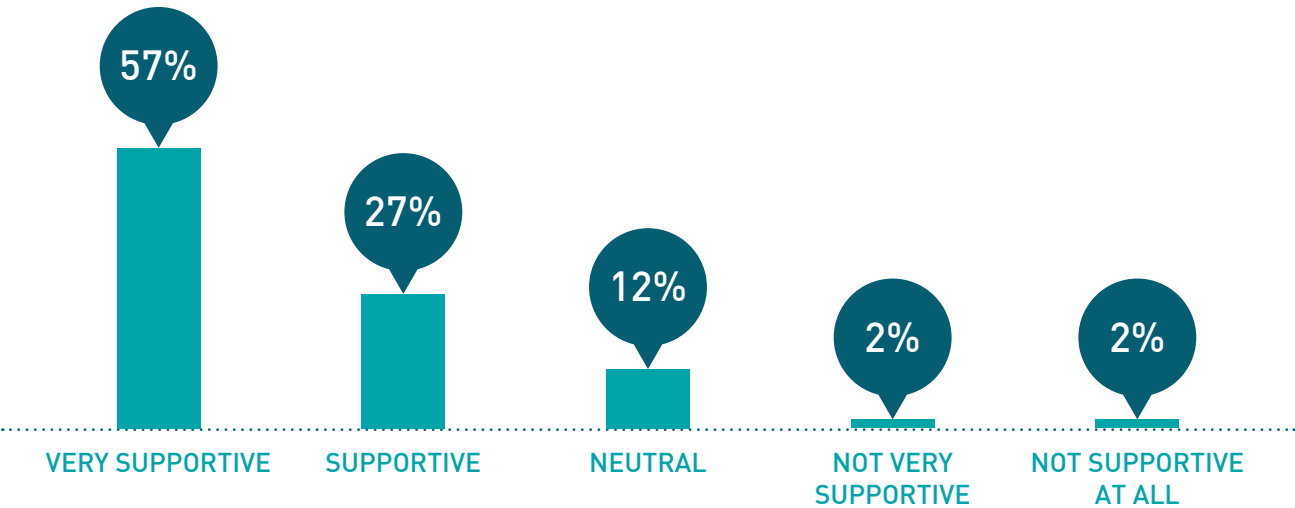
- **Upgrade the ferry fleet (10%):** Focus on fleet upgrades to improve the reliability and capacity of ferry services.
- **Create a specific commercial ferry service for large vehicles (6%):** Establish a dedicated commercial ferry service or alternate times/routes for large vehicles like big rigs to increase passenger vehicle capacity on regular sailings.
- **Implement action plans (3%):** Put in place action plans with defined timelines for building new ferries and enhancing services.
- **Consider barging commercial trailers to free up ferry space (2%):** Explore the possibility of barging commercial trailers to free up space on ferries for other vehicles and passengers.



Goal 3: The ferry system is safe for users and employees



Q13. How supportive are you of this goal and its objectives?



- 84% of respondents are supportive or very supportive of this goal and its objectives.

Q14. Goal 3: The system is safe for users and employees. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

5,267 comments were received. Among these, there was a consensus that safety is paramount and that the ferry system is relatively safe. However, there were calls for improvements in staffing, training, and customer service. Respondents want a coastal ferry service that acts on these issues to ensure that safety and reliability are not compromised. There was also a desire for transparency and genuine engagement with the public to address these concerns.

Q15. Goal 3: The system is safe for users and employees. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

2,988 comments were received. There are positive responses about the ferry system being solid and safe, and there is a desire for improvements in staffing, accessibility, communication and overall service quality. Respondents want a ferry system that is reliable, efficient and responsive to the needs of its passengers and its people. The comments from Q14 and Q15 have been summarized into the following high-level themes:

- Enhance accessibility for passengers (23% of the comments for this question):**
Improve accessibility by ensuring clear pathways and adequate elevator access for passengers with disabilities and those with strollers.
- Review and streamline the reservation system for improved accessibility (18%):**
Re-evaluate and potentially simplify the reservation system to enhance accessibility and reduce complexity by making it easier for users to navigate, find information and make reservations.
- Address employee needs and retention and improve the working environment (17%):** Focus on addressing employee needs, including fair wages, job security and morale improvement, to create a positive working environment.
- Develop comprehensive contingency and communication plans for emergencies (12%):** Create detailed contingency and communication plans for emergencies to ensure the safety of both passengers and crew.
- Integrate diversity, equity, and inclusion initiatives (9%):** Incorporate diversity, equity and inclusion initiatives to ensure a culturally safe and welcoming experience for all passengers.
- Prioritize safety measures and exceed federal and provincial rules (8%):** Make safety a top priority by enhancing safety measures and potentially exceeding federal marine transportation rules.

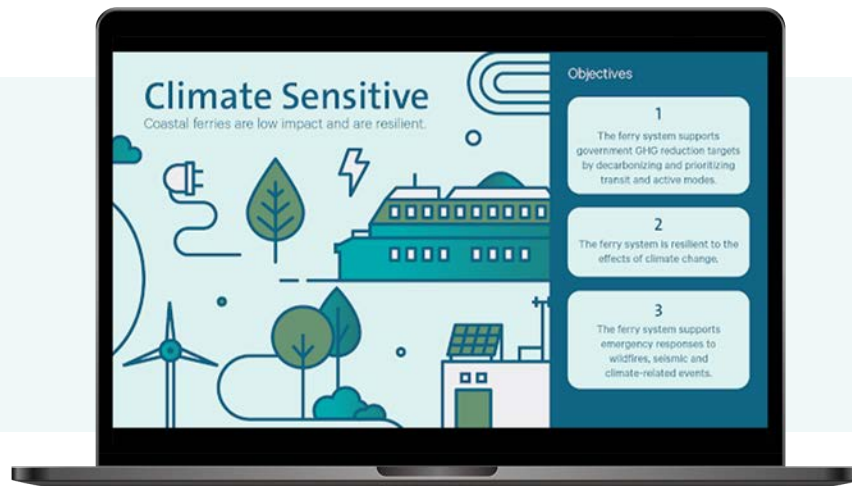
DID YOU KNOW?

BC FERRIES IS COMMITTED TO IMPROVING ACCESSIBILITY THROUGHOUT ITS FLEET AND TERMINALS. IT WORKS WITH REPRESENTATIVES FROM VARIOUS ORGANIZATIONS TO LEARN HOW IT CAN IMPROVE ITS SERVICES FOR CUSTOMERS WITH ACCESSIBILITY NEEDS.

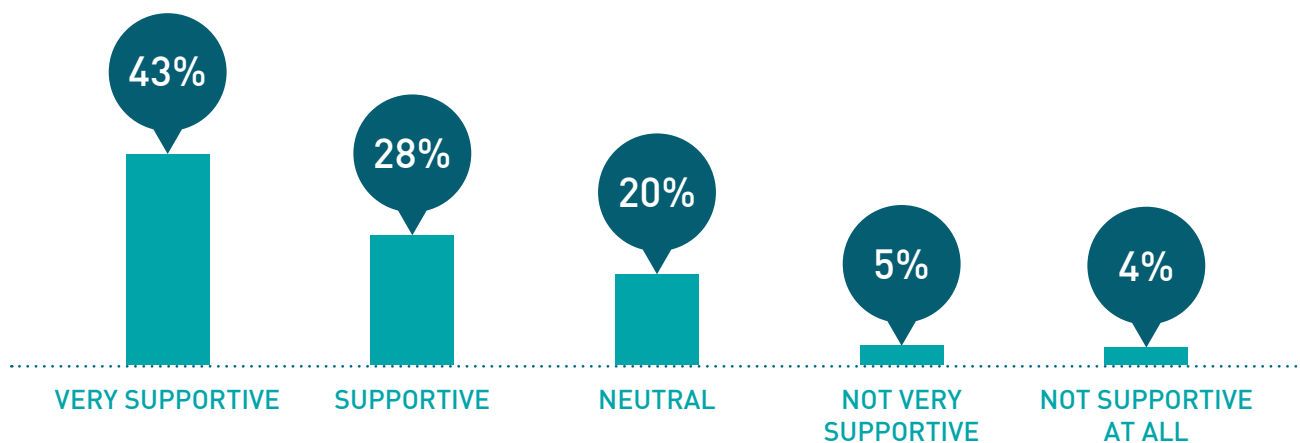
- **Explore automation to enhance efficiency (4%):** Investigate the feasibility of implementing automation where appropriate to reduce the need for human interaction and improve operational efficiency.
- **Evaluate major infrastructure changes, including potential bridge construction (4%):** Some comment suggested the government should consider major infrastructure changes, such as building bridges to reduce the number of routes and focus on key ones, potentially leading to improved service on the remaining routes.



Goal 4: Coastal ferries are low impact and are resilient



Q16. How supportive are you of this goal and its objectives?



- 71% of respondents expressed feeling supportive or very supportive of this goal and its objectives and 20% feeling neutral about it.

Q17. Goal 4: Coastal ferries have a low impact on the environment with infrastructure that is resilient to climate change. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

4,633 comments were received. Overall, the sentiment of the comments was mixed, with a general acknowledgment of the importance of environmental responsibility and climate action, as well as a significant amount of concern regarding the practicality, cost and potential impact on service quality. There was a desire for more clarity and detail on environmental strategies and a cautious approach to ensure that core services are not compromised.

Q18. Goal 4: Coastal ferries have a low impact on the environment with infrastructure that is resilient to climate change. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

2,678 comments were received. While there was a clear interest in environmental sustainability and reducing the ferry system's impact on climate change, there was also a strong desire for practical, cost-effective solutions that ensure the reliability and efficiency of the service. Respondents also called for more detailed plans and actions rather than generic goals, and there was a sense of urgency for the ferry system to lead by example in environmental stewardship. The comments from Q17 and Q18 have been summarized into the following high-level themes:

- Transition the ferry fleet to low-emission power sources and promote sustainable transportation (19% of the comments for this question):** Shift the ferry fleet to electric or alternative low-emission power sources while implementing strategies to discourage vehicle travel and prioritize public transit, walking and cycling.
- Support marine habitat restoration and marine life protection initiatives (17%):** Provide support for local groups and initiatives aimed at restoring habitats and protecting marine life, including developing specific objectives related to marine animal protection.
- Invest in energy-efficient passenger-only ferries (16%):** Allocate resources to invest in energy-efficient and smaller passenger-only ferries to accommodate a transition towards passenger-only travel.
- Improve waste management practices and reduce single-use plastics (15%):** Implement better waste management practices, including onboard recycling, and take further steps to reduce the use of single-use plastics.



I think it is unrealistic to prioritize transit and active travel for those of us who live in rural islands and require a vehicle to get to appointments, etc. Addressing the plan for wildfires and emergencies for residents is huge!

- Mid Vancouver Island

DID YOU KNOW?

BC FERRIES IS WORKING TO ELECTRIFY ITS SERVICES. IN 2023, BC FERRIES WAS APPROVED TO ADD FOUR NEW HYBRID ELECTRIC FERRIES AND TO ELECTRIFY FOUR OF ITS TERMINALS.

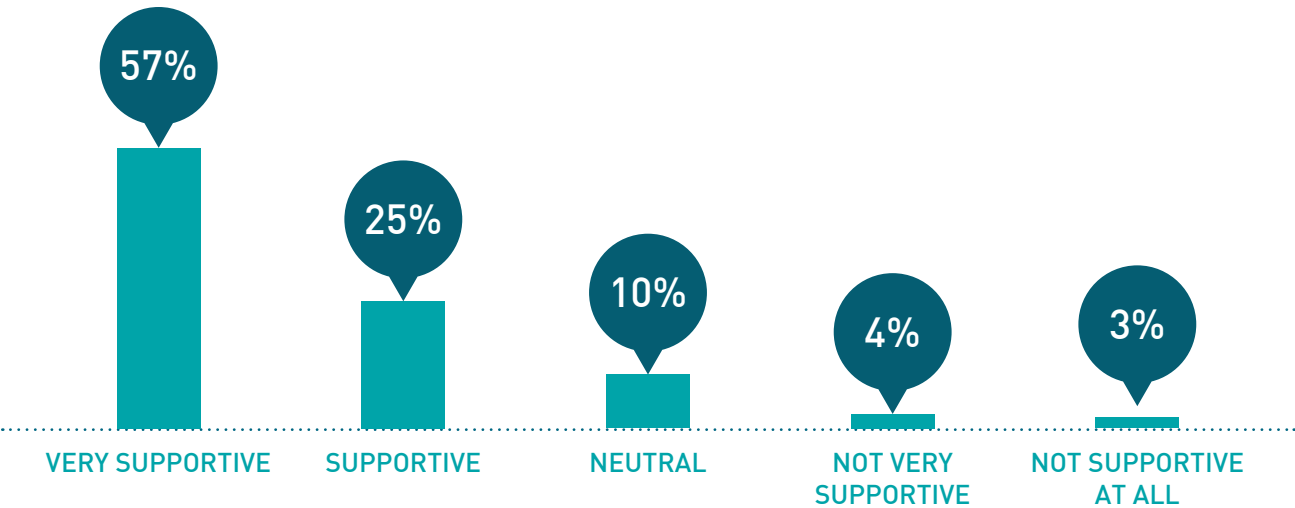
- **Enhance infrastructure resilience to climate change (12%):** Strengthen infrastructure resilience to climate change by redesigning ferry terminals to respond to environmental conditions and prepare for extreme weather events.
- **Explore innovative green technologies for ferries (8%):** Investigate and implement innovative technologies such as hydrogen fuel, sails, solar power, and other green solutions for ferry operations.
- **Enhance emergency response capabilities and community support (5%):** Improve emergency response capabilities, including faster transportation for emergency crews and support for community emergency response teams.
- **Develop and communicate clear environmental goals and progress tracking (2%):** Establish and communicate precise environmental goals, such as achieving carbon neutrality by 2030, and establish a system for tracking progress towards these objectives.



Goal 5: The ferry system provides good value to the public



Q19. How supportive are you of this goal and its objectives?



- 82% of respondents cited feeling supportive or very supportive of this goal and its objectives.

Q20. Goal 5: BC Ferries is affordable for users and is a financially sustainable organization. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

5,710 comments were received. The overall sentiment was a desire for a more affordable and accessible ferry system that reflects its role as an essential public service, balanced with the need for financial sustainability. There was a call for transparency, efficiency, and fairness in how the system is managed and funded.

Q21. Goal 5: BC Ferries is affordable for users and is a financially sustainable organization. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

3,368 comments were received. The sentiment from the responses is largely focused on making the ferry system more affordable, equitable and efficient, with a strong desire for more variable pricing models that make ferry travel more affordable for certain kinds of users. The comments from Q20 and Q21 have been summarized into the following high-level themes:

- **Offer discounted fares for island residents (14% of the comments for this question):** Provide discounted fares for island residents, recognizing the essential nature of the service as part of their daily transportation needs.
- **Consider deeper fare discounts for seniors and students (12%):** Explore the possibility of offering more substantial fare discounts for seniors and students, regardless of their residence on islands.
- **Simplify the ferry experience and integrate reservation costs (12%):** Streamline the ferry experience to make it more affordable for the average person, including further integrating reservation costs into the ticket price and incentivizing passenger choices that help spread capacity away from peak sailings.
- **Offer bulk ticket purchase options for savings (10%):** Provide options for bulk ticket purchases at discounted rates, such as punch passes, to offer savings for frequent travelers and low-income families.
- **Re-evaluate and enhance the reservation system (9%):** Review and enhance the current reservation system to incentivize reservations and make it more user-friendly.
- **Implement a tiered pricing system for efficiency (8%):** Expand a tiered pricing system that offers discounts during non-peak hours and encourages early booking to manage demand and improve operational efficiency.

DID YOU KNOW?

THAT SAVER AND PREPAID FARES, INTRODUCED IN 2022, INCORPORATE RESERVATIONS AT A FRACTION OF THE COST OF BOOKING A RESERVATION ON ITS OWN AND THEN PAYING AT THE TERMINAL.

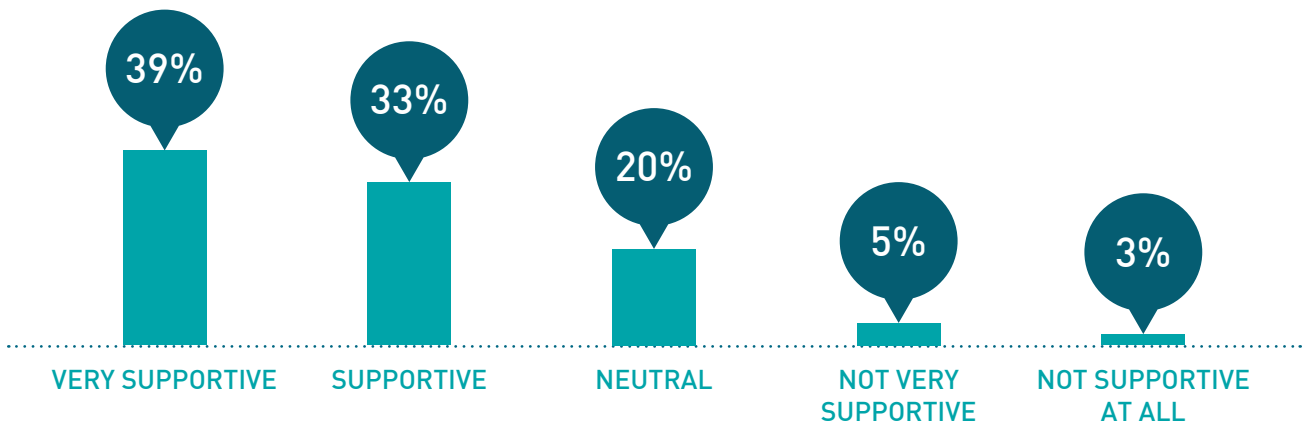
- **Explore integration of a coastal ferry system with the provincial highway system (6%):** The government should investigate the integration of BC Ferries into the provincial highway system to standardize user charges and explore potential government subsidies.
- **Enhance financial management for long-term sustainability (5%):** Improve financial management practices that better ensure the ferry system's long-term sustainability and resilience in a changing economy.
- **Engage the community for feedback and improvement (4%):** Actively involve the community in providing feedback and suggestions to ensure the ferry system aligns with user needs and identifies areas for improvement.
- **Review and reduce administrative and board compensation (3%):** Conduct a review of administrative and board salaries and perks to control costs and refocus on the ferry system's role as a transportation service.
- **Transition BC Ferries to a non-profit model (2%):** Evaluate the transition of BC Ferries to a fully non-profit model, emphasizing its role as a transportation service rather than a luxury experience.



Goal 6: Customers have an accessible, comfortable and convenient experience



Q21. How supportive are you of this goal and its objectives?



- 72% of respondents feel supportive or very supportive with another 20% feeling neutral.

Q22. Goal 6: The customer experience is accessible and comfortable, with modern technology and amenities. Please explain your reasons for your level of support or lack thereof for the draft goal and objectives.

4,881 comments were received. The overall sentiment was mixed for this question. While there was support for making the ferry experience accessible and comfortable, many responses emphasized the need for reliable, efficient, and affordable ferry services over modern amenities and technology. There was a clear desire for the ferry system to meet the basic transportation needs of users effectively.

Q23. Goal 6: The customer experience is accessible and comfortable, with modern technology and amenities. What could be added to the draft goal and its objectives for the coastal ferry system's long-term strategy?

2,630 comments were received. Overall, while there were some positive sentiments about this proposed goal and objectives, there was also a significant amount of critical feedback. Respondents want a ferry system that prioritizes accessibility, reliability and affordability, with modern technology and amenities that enhance the core service without driving up costs. There was a call for a customer-focused approach that considers the diverse needs and expectations of all users. The comments from Q22 and Q23 have been summarized into the following high-level themes:

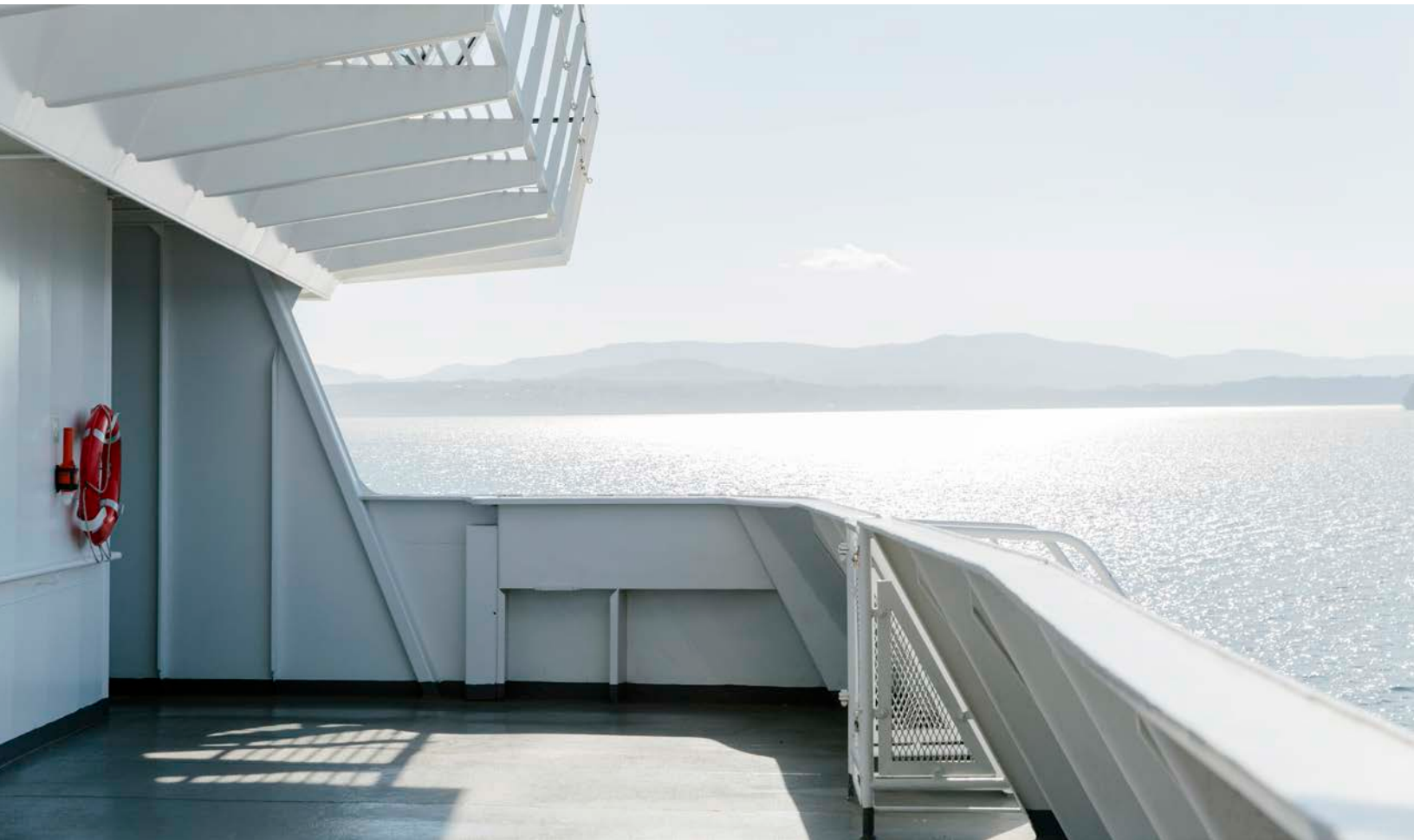
- **Offer Wi-Fi service for reliable internet access (28% of the comments for this question):** Offer Wi-Fi service on all ferries and terminals to ensure reliable internet access for passengers.
- **Improve accessibility for individuals with disabilities (20%):** Enhance accessibility for individuals with disabilities by providing better pathways, seating, and assistance.
- **Prioritize responsive customer service (12%):** Focus on customer service by training staff to be more responsive to customer needs, particularly addressing the requirements of passengers with mental health barriers or disabilities.
- **Modernize systems for a seamless user experience (8%):** Modernize systems to facilitate an easy and enjoyable end-to-end user experience, including the implementation of automated ticket booths and enhanced booking capabilities.
- **Develop a strategy for passengers remaining in vehicles (7%):** Create a working strategy for passengers who need to remain with their vehicles due to policy or personal reasons.
- **Offer affordable and healthy food options (7%):** Provide more affordable and healthy food choices, potentially including locally produced items.



I don't care about modern tech or experience, it's just a boat ride. But accessibility is incredibly important. Working elevators, managing the steepness of the stairs, having sensory friendly spaces, accessible bathrooms, etc.

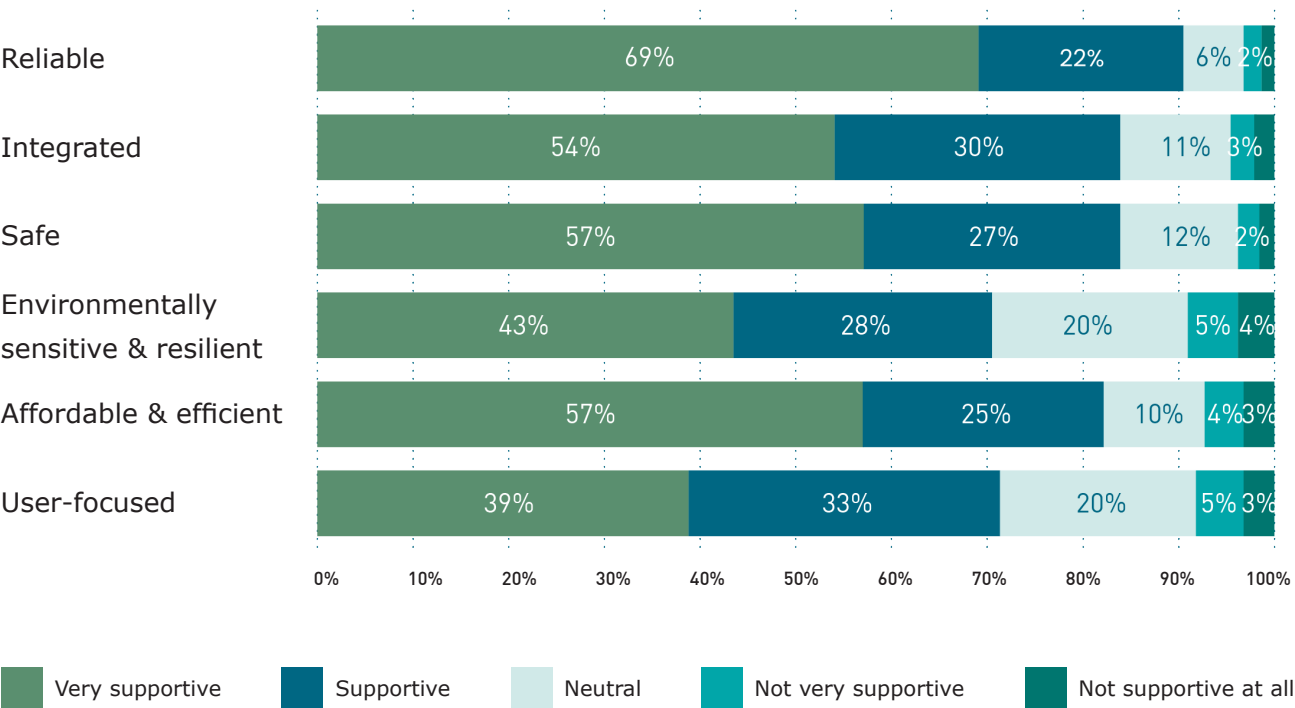
- Mid Vancouver Island

- **Standardize amenities across major terminals (5%):** Standardize amenities across major terminals to provide a consistent experience for passengers.
- **Implement feedback mechanisms and ongoing surveys (4%):** Integrate feedback mechanisms such as ongoing surveys to understand and meet changing customer expectations.
- **Prioritize environmental sustainability (4%):** Emphasize environmental sustainability by reducing plastic and single-use items, exploring alternative power sources, and considering the overall impact on the planet.

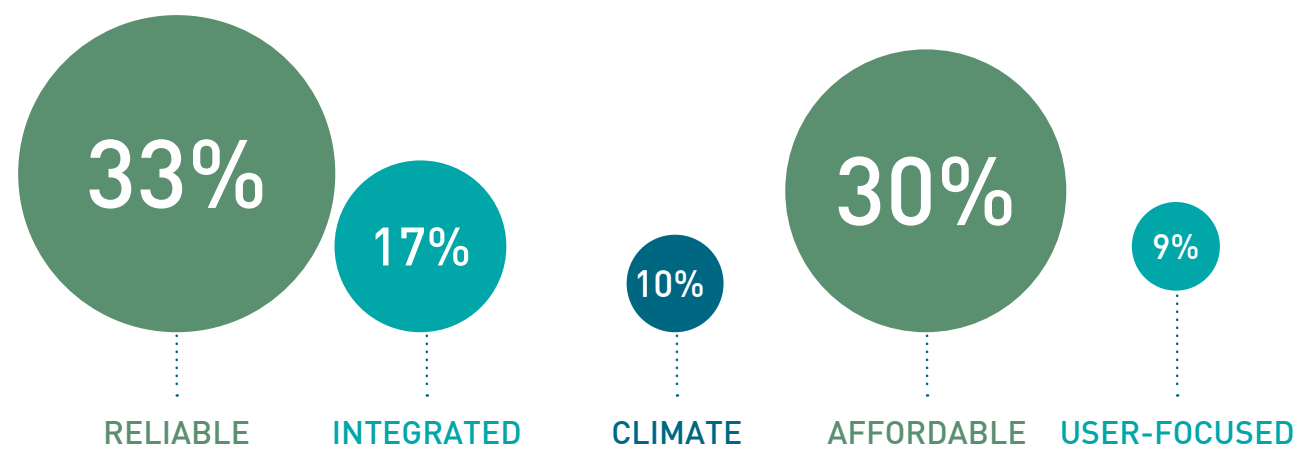


Q24. Which goals and objectives are most important to you? (Please select up to three)

The following table provides a comparative analysis of levels support across goals.



WHICH GOALS AND OBJECTIVES ARE MOST IMPORTANT TO YOU? (PLEASE SELECT UP TO THREE)



- Reliability is the most important goal for respondents, followed by affordability & efficiency and integration. *Note: as respondents were able to select up to three choices, this chart adds up to 99% to reflect shared selections.*

Q25. Thinking about ferry service in the future, what else is important to you, aside from the goals and objectives listed above?

5,761 comments were received. The sentiment was one of frustration with the current state of the coastal ferry system, with a strong desire for improvements in reliability, affordability, staffing, community engagement, and communication. Respondents are looking for a ferry service that is more responsive to the needs of residents and less focused on non-essential features. The comments have been summarized into the following high-level themes:

- Enhance ferry service reliability and punctuality (18% of the comments for this question):** Reduce delays and better ensure on-time departures and arrivals to enhance the reliability and punctuality of ferry services.
- Address reservation system issues for flexibility (15%):** Accommodate unexpected delays by prioritizing impacted travellers on the next sailing, refunding fees, providing vouchers, etc., and provide flexibility for customers with reservations by addressing reservation system issues.
- Increase affordability for residents and frequent travelers (14%):** Make ferries more affordable, especially for island residents and frequent travelers, and consider introducing further discounted or free travel for seniors.
- Offer competitive wages and employment conditions (11%):** Ensure better financial security for entry-level staff by offering competitive wages and employment conditions.



Last minute cancellations have such an impact on travellers especially when there is no other way to get a vehicle across into Vancouver or the Island. I do not feel confident even having a reservation that I will be able to get on a ferry. As someone who works in the hospitality industry it is easy to see the lack of confidence in travellers coming to the island and more reluctance to come across when they know they need to rely on a ferry to get home.

- Lower Mainland

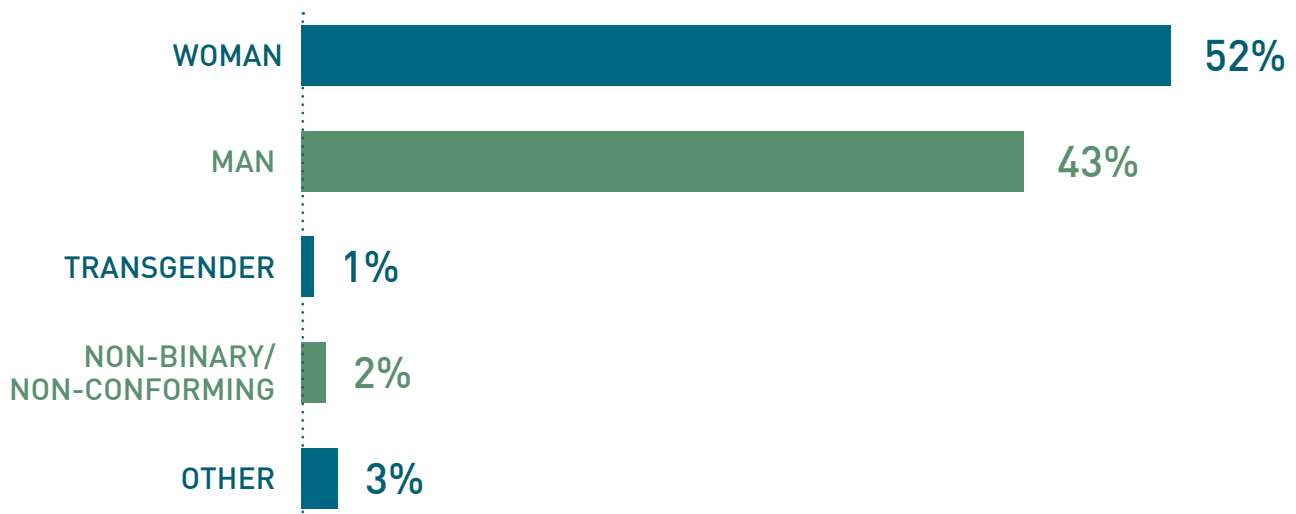
DID YOU KNOW?

SENIORS ALREADY TRAVEL
WITHOUT FEES MONDAYS
THROUGH THURSDAYS, AND
STUDENTS TRAVELING FOR
SCHOOL EVENTS TRAVEL AT
50% OF THE FEE.

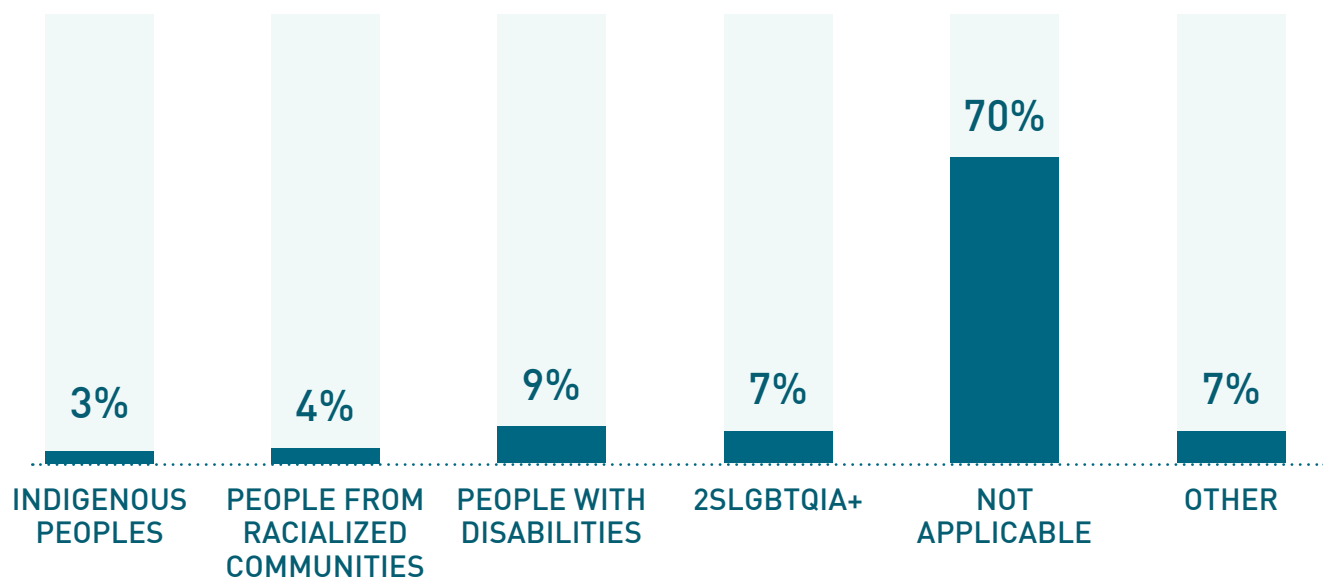
- **Improve employee morale and working conditions (10%):** Address low staff morale and high turnover rates by enhancing employee morale and working conditions.
- **Emphasize the ferry system as an essential service (7%):** Consider the ferry system as an essential service and part of the highway system, rather than a profit-oriented business, and explore alternatives like building a bridge.
- **Improve communication with customers (6%):** Enhance communication with customers regarding service issues and provide clear explanations for decisions and changes.
- **Reduce waste and promote environmental sustainability (5%):** Minimize waste, particularly single-use utensils and food service waste, to promote environmental sustainability.
- **Enhance onboard food options and pet-friendly accommodations (5%):** Improve food options on board, including healthier and vegetarian choices, and address the need for better pet-friendly spaces.
- **Expand services to match demand and growth (4%):** Expand services to align with demand and growth, including providing more reliable sailings and better integration with other transportation systems.

DEMOGRAPHIC QUESTIONS

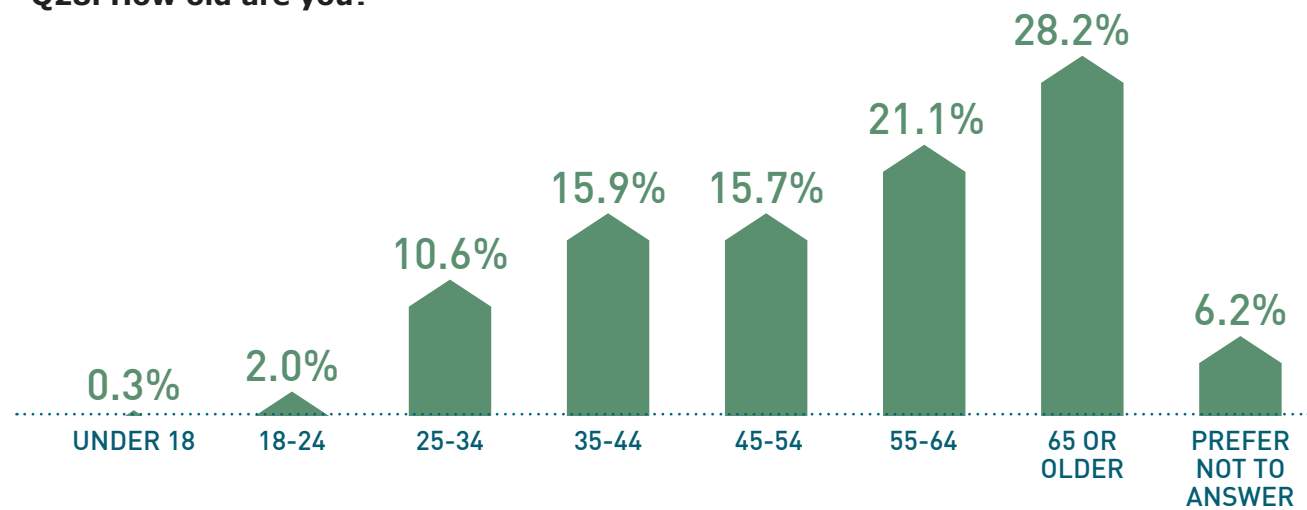
Q26. Gender identity (select all that apply)



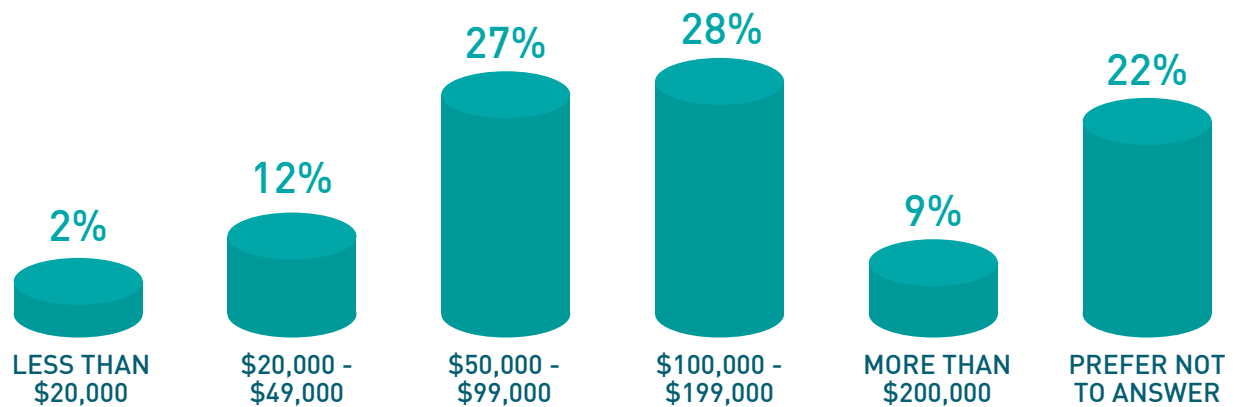
Q27. Do you identify as a member of any of the following equity-deserving communities? (select all that apply)



Q28. How old are you?



Q29. Which of the following best represents your annual household income?



Next steps

The next phase of engagement is planned for spring 2024. Key input and findings will continue to be shared with the public. The culmination of these efforts will be the release of a Vision for the coastal ferry system in early 2025, outlining a forward-looking roadmap for an integrated, reliable, and accessible ferry service, poised to meet the evolving needs of coastal communities now and into the future.



**Charting
the Course**
A VISION FOR COASTAL FERRIES

