

**POLICY PAPER #1: REPORT ON
SOCIO-ECONOMIC IMPACTS OF BC
FERRIES SERVICE REDUCTIONS
April, 2014**

Prepared by the Special Committee on BC
Ferries, and submitted for consideration of
the membership at the 2014 AVICC
Convention by the AVICC Executive.

**This policy paper was introduced for
AVICC membership consideration at the
65th AVICC AGM and Convention on
Saturday, April 12th, 2014.**

**Upon consideration the Policy Paper and
its recommendations were endorsed by
the membership.**

TO: AVICC Members

FROM: **SPECIAL COMMITTEE ON BC FERRIES**

DATE: April 9, 2014

RE: **REPORT ON SOCIO-ECONOMIC
IMPACTS OF BC FERRIES SERVICE
REDUCTIONS**

POLICY PAPER
#1

2014 AVICC CONVENTION

1. DECISION REQUEST

That the AVICC membership endorse the next steps proposed by the Special Committee on BC Ferries to continue to undertake research and analysis into the socio-economic impacts of increased ferry fares and reduced service levels.

2. INTRODUCTION

The purpose of this policy paper is to provide the AVICC membership with an overview of the work undertaken to date by the joint AVICC-UBCM Special Committee on BC Ferries in response to the Province's announced service reductions and increase in fares. While the Special Committee is pleased with the work undertaken to date, members agreed that additional quantitative information, gathered from other sources, would help to strengthen the argument of socio-economic impacts for communities. In addition to the information outlined in this policy paper to supplement the consultants report, the AVICC membership will have an opportunity to discuss this matter at a special plenary session during the AVICC conference. Based on the information shared in this paper, and the discussion that will take place at the plenary, the AVICC membership is being asked to support a series of next steps as requested by the Special Committee.

The first part of this paper will provide the background to the establishment of the Special Committee on BC Ferries. A brief overview of the Committee's work to date will be outlined and brief summary of the consultant's paper, which has been attached to this policy paper. The third part of the paper will provide additional information that has been gathered since the consultant's report to highlight, in more quantitative manner, the socio-economic impacts of BC Ferries service cuts and fare increases. The final section outlines what proposed course of action the Special Committee on BC Ferries is recommending and seeks the endorsement of the AVICC members on this recommended direction.

3. BACKGROUND TO ESTABLISHMENT OF SPECIAL COMMITTEE ON BC FERRIES

UBCM member interest in BC Ferries has been consistent for over a decade; and at different points UBCM has taken specific actions in response to the changes that have taken place with BC Ferries. Of late, UBCM established a Task Force in 2011 in response to the review of the Coastal Ferry Act. The Task Force prepared a submission and met with both the Minister responsible and the Independent Commissioner. As well, UBCM members have endorsed a number of resolutions over the years with respect to BC Ferries, specifically in regard to its operations, fares and service levels. Members have also reiterated the position that ferries should be funded, administered and managed as though they are an extension of the provincial highway system (2001-B64; 2002-B77; 2004-B59; 2007-B18; 2010-B20; 2010-B110; 2011-A3; 2012-B6; 2013-B12).

Consequently, when the Minister of Transportation and Infrastructure announced changes to BC Ferries service levels and fares in November 2013, UBCM members and more specifically coastal communities expressed their concerns. In the same announcement the Minister advised that community engagement sessions would be held to allow affected parties to comment on the announced changes. While communities signaled their concerns about the impact of increased fares and reduced service levels, what was even more disconcerting was that the Minister was proceeding to implement these changes by April 2014 for minor routes in the absence of any type of socio-economic impact analysis of what the changes would mean for coastal communities and for the provincial economy as a whole.

UBCM President Rhona Martin wrote to Minister Stone on January 8th expressing concern about the announcement with respect to increased fares and service reductions:

“Ferries also serve as an integral transportation link to communities for economic development opportunities, such as tourism. Specifically we are hearing from communities who have invested money, time, resources and extensive energy to market their communities as tourist destinations. However, if the transportation networks are not readily available to service these coastal communities all of that work has been wasted. Potential economic development opportunities have been lost, resulting in a no-win situation for communities and the provincial government.”

At the January 23, 2014 meeting of the UBCM’s Community Economic Development Committee members discussed how best to respond to the November announcement. In response, the Committee put forward the following motion that was endorsed by the Executive:

That UBCM reconstitute the BC Ferries Task Force to support the efforts of the AVICC and the Coastal Communities Chairs group, in response to the Province’s announced

cuts in service levels on both minor and major ferry routes.

Following the UBCM Executive meeting, the AVICC Executive met on February 3, 2014 and endorsed the following three motions:

- 1. Strike an AVICC Special Committee on BC Ferries (composition as per Draft Terms of Reference;*
- 2. Approve in principle the Draft Terms of Reference for the Special Committee on BC Ferries; and*
- 3. Approve a budget of \$6,000.00 towards the cost of the study and miscellaneous costs (e.g. Committee Meeting and Operational Expenses).*

Recognizing the desire on the part of both associations (AVICC and UBCM) to respond to the direction taken by the Province with BC Ferries, a common approach was agreed upon and on February 7, 2014, the Special Committee on BC Ferries was established.

The Committee is comprised of the following individuals:

- Mayor Larry Cross, AVICC President
- Tony Law, Co-Chair, Ferry Advisory Committee Chairs, Hornby Island Trustee, Islands Trust
- Chair Colin Palmer, Coastal Regional District Chairs, Powell River Regional District
- Chair Jim Abram, Coastal Regional District Chairs, Strathcona Regional District
- Chair Joe Stanhope, Past President AVICC / Coastal Regional District Chairs, Nanaimo Regional District
- Chair Sheila Malcolmson, Coastal Regional District Chairs/Islands Trust Council
- Chair Art Kaehn, UBCM Community Economic Development Committee Chair, Regional District Fraser Fort George
- Chair Barry Pages, Skeena Queen Charlotte Regional District
- Chair Garry Nohr, Sunshine Coast Regional District
- Councillor Claire Moglove, AVICC Executive, UBCM Third Vice-President, City of Campbell River
- Councillor Barbara Price, Second Vice President AVICC Executive, Town of Comox

4. OVERVIEW OF WORK TO DATE BY SPECIAL COMMITTEE

Once established, the Special Committee adopted its terms of reference and agreed to hire a consultant to conduct an analysis to estimate the economic significance of the proposed BC Ferries service reductions on communities. Specifically the analysis was intended to include economic sectors impacted by BC Ferries access such as tourism, retail and manufacturing.

Part of the consultant's work included a targeted survey to obtain feedback from affected stakeholders, specifically focusing on the reductions in service levels. Relying on the existing networks within the Ferry Advisory Committees, Chambers of Commerce and other organized groups, the survey was launched and closed within a very short timeline, 4 days. Despite the short response time, over 400 responses were received. The overall intent of the research was to compare the likely changes in economic activity within coastal communities to the planned BC Ferries operating savings from the planned service reductions. It is important to note that the consultant's work was focused on service reductions, not fare increases.

The comments received from the survey, and information gleaned from other secondary source reports, were also included in the consultant's report. The Committee sent a letter to Minister Stone advising of our work but also included a request to provide to us any information or research work that the Ministry may have done previously in regard to socio-economic impact analysis. In response Ministry staff advised that the only work that had been conducted was a 2002 study by Grant Thornton for BC Ferries on the Bella Coola and Port Hardy service. Working under a very tight timeline (less than one month) meant that some additional quantitative information (i.e. residential assessments, population figures) was not received in time to be included.

However, the consultant proceeded to consolidate the survey responses and prepare his report. Based on the survey responses, the consultant made the following conclusions:

- nearly 63% of respondents expressed concern that the ferry sailing reductions announced in November 2013 would have a negative impact on employment, with the most serious impacts expected to occur in businesses that comprise the tourism industry.
- 57% of respondents indicated that the sailing reductions would produce negative impacts for business, most likely affecting those service sector businesses serving both residents and tourists.
- respondents rated the significance of socio-economic issues as a 4.2 out of 5 for the three reduced measures of reduced population, declining property values and reduced employment opportunities.

And, while the consultant concluded that the opinion-based survey did not allow this link to be confirmed or quantified, it does appear that the opinions of the respondents were correct as can be shown in the next section in regard to the quantitative information received from BC Assessment and BC Stats on residential assessment values and population figures.

A copy of the consultant's report is appended to this Policy Paper as Appendix 1.

On February 25th, the Special Committee convened via conference call to discuss the consultant's report and next steps. While all members of the Special Committee had hoped that more quantitative data could have been secured, they

agreed that within the tight timeline for the research not much more could have been done. While the report did support the anecdotal information that is being heard about the potential effects of the service reductions, it did not provide a solid socio-economic impact analysis of what the effect would be for communities. Special Committee members again expressed disappointment that the Province had not conducted this analysis.

Upon reviewing the draft report the Special Committee agreed that:

- the report alone, would not be enough to make the case of 'significant economic impact' to the Province; and
- additional work should be undertaken in advance of the AVICC conference to flesh out the report with additional information (i.e. population figures, residential assessments, etc).

The next section responds to bullet two above by providing additional information that has been collected in response to the request of the Special Committee.

5. ADDITIONAL INFORMATION TO SUPPORT SOCIO-ECONOMIC IMPACTS

As noted in the previous section, there were pieces of information that had been requested by the Special Committee that had not been received in time to be included in the consultant's report. Information from BC Stats and BC Assessment has since been received and is presently below.

Population Figures

Jurisdiction	Route	2001	2006	2011
Islands				
Salt Spring	9,6	9,275	9,635	10,235
Penders (N & S)	9	1,935	2,235	2,228
Mayne	9	885	1,105	1,070
Galiano	9	1,070	1,260	1,140
Saturna	9	320	360	334
Thetis	20	350	375	337
Gabriola	19	3,525	4,050	4,040
Hornby	22	960	1,070	955
Denman	21,22	1,020	1,100	1,020
Bowen	8	2,955	3,365	3,400
Quadra	23	2,555	2,470	2,601
Terminal Communities				
Comox (Town)	17	11,170	12,385	13,625
Powell River (City)	17	12,985	12,957	13,165

Chemainus (Community)	20	2,706	2,937	3,035
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The data suggests that in all of the identified Island communities populations increased between 2001 and 2006. However in the period between 2006-2011, all the Islands, with the exception of Bowen, Quadra and Salt Spring experienced population decreases, thus showing a definite trend toward declining populations on the majority of the Island communities.

With respect to terminal communities, all have continued to experience population growth.

Assessed Residential Property Values **

Jur	Route	2001	% Ch	2006	% Ch	2011	% Ch	2014
Saltspring*	9,6			\$2,591,433,027	23%	\$3,198,127,473	-9%	\$2,925,767,013
Pender (N&S)*	9			\$737,151,501	36%	\$1,002,507,921	-11%	\$890,652,304
Mayne*	9			\$391,957,700	60%	\$626,794,102	-20%	\$498,377,402
Galiano*	9			\$440,964,501	24%	\$548,852,302	-15%	\$467,473,002
Saturna*	9			\$172,438,711	50%	\$258,911,003	-14%	\$221,492,103
Thetis	20			\$82,405,900	63%	\$134,066,900	-5%	\$127,462,600
Gabriola	19			\$822,859,750	37%	\$1,124,677,000	-11%	\$1,000,832,600
Hornby*	22			\$357,720,500	41%	\$505,921,200	-2%	\$497,280,500
Denman*	21, 22			\$282,812,900	37%	\$388,276,600	-8%	\$355,370,300
Bowen	8			\$1,103,306,303	43%	\$1,574,434,296	-8%	\$1,453,052,196
Quadra*	23			\$397,380,000	41%	\$561,910,100	-9%	\$509,526,200
Comox	17			\$1,217,497,600	56%	\$1,901,798,363	0%	\$1,908,552,801
Powell River	17			\$893,374,991	55%	\$1,383,784,000	-11%	\$1,235,583,200
Chemainus	20			\$287,683,400	65%	\$473,837,600	5%	\$499,030,400

Note: Figures taken from each years Roll Totals Report. Actual Values. Total Residential Assessments only.

Prepared by Bill Dawson (Deputy Assessor, VI Region) on Feb 25, 2014.

* Note: Multiple Neighbourhood summations.

** - BC Assessment was unable to provide the 2001 stats as this older data is housed on a different computer system. However, staff advised that this would be provided in May, 2014.

As shown from the data provided, assessed residential property values in all of the communities increased dramatically over the 2006 to 2011 time period. However, this trend dramatically changes in the 2011 to 2014 time period where it is evident that all communities, except for Chemainus and Comox, experienced decreases as high as 20%, which was the case for Mayne Island.

Both of these additional sources of information point to the conclusion that the anecdotal information gathered as a result of the survey work by the consultant was accurate. Survey respondent concerns about declining populations and declining assessed residential property values appear to be substantiated by these figures from BC Stats and BC Assessment; and with the November 2013 announcements of increased fares and reduced service levels at BC Ferries, this downward trend in populations and residential assessments is likely to continue.

It seems plausible to assume that as travel to and from the Island communities becomes more expensive, and less convenient with the reduced number of sailings, living in these communities becomes less attractive, and certainly more costly, for those residents who rely on the ferry service.

The Committee notes that in addition to the work that they have conducted, there have been a number of other reports issued recently attempting to undertake a similar task – quantifying the socio-economic impact of increased ferry fares and reduced service levels. The work of the Tourism Industry Association of BC in January 2014 entitled *Discovery Coast Tourism Economic Impact Analysis A Preliminary Assessment of BC Ferries Route 40 (Discovery Coast) Economic Impacts on the BC Tourism Sector* and the report from the City of Prince Rupert *Beyond Hope BC Ferries and Northern British Columbia*, are good examples.

In the *Discovery Coast Tourism Economic Impact Analysis* report some interesting figures with respect to Route 40 are provided. It estimated that:

“The total provincial taxes generated by Route 40 passenger spending is \$783,441. When these taxes are taken into consideration, the annual Route 40 operating deficit of \$725,000 becomes a modest surplus of \$58,441.”

And in the Prince Rupert report, a request to the Province to postpone the service cuts has been made:

“The full economic benefit of BC Ferries is not fully understood. The City of Prince Rupert respectfully requests that service cuts be postponed until 2015, and a comprehensive economic impact assessment, fully studying the direct and indirect benefits to northern ferry routes throughout the provincial economy, be undertaken immediately to guide future changes to BC Ferries service.”

6. NEXT STEPS

This Policy Paper is being presented to the AVICC membership to provide a report out on the work to date by the Special Committee on BC Ferries. As well it serves as a means to seek membership direction on next steps.

As noted earlier the Committee has conducted some preliminary work with respect to the socio-economic impacts of the announced ferry fare increases and reduced service levels. What we have learned from the additional statistical information from BC Stats and BC Assessment is that the concerns raised by survey respondents with respect to declining populations and declining residential assessment values is confirmed. When you combine reduced service levels and fare increases it appears likely that this downward trend will continue.

The Special Committee echoes the sentiments expressed by the City of Prince Rupert and is very disappointed that the Province has chosen to implement these changes to BC Ferries in the absence of any socio-economic impact analysis. In the absence of this analysis, the Special Committee wishes to seek direction from the membership to continue its work. While the work has started with the consultant's report and the additional quantitative information from BC Stats and BC Assessment, Committee members are requesting support to continue their work to fill the information gap that presently exists. While it is acknowledged that this work should have been conducted by the Province, the Committee feels strongly enough to seek membership support to do it themselves in the absence of provincial action. However, the Committee also realizes that time is short and with the changes to fares already in place and upcoming service reductions later this month, the additional work needs to be focused. The Committee is suggesting that more thorough research be conducted on one or two specific routes that would provide reliable quantitative data that would substantiate their claim that the changes to BC Ferries will have serious socio-economic impacts for communities, various sectors and the overall provincial economy.

7. RECOMMENDATION

That the AVICC membership endorse the Policy Paper of the Special Committee on BC Ferries on the economic impact of planned ferry service reductions.

That the AVICC membership support the request by the Special Committee on BC Ferries to engage the services of a consultant to undertake Phase 2 work that would:

- seek to fill the information gap that presently exists around the socio-economic impacts of planned ferry changes; and
- undertake more thorough quantitative research, focusing on one or two specific routes, that would provide reliable quantitative data to identify the socio-economic impacts of planned ferry changes for communities, various sectors and the overall provincial economy.

ATTACHMENT (1)

- **APPENDIX 1 – Consultant's Report
ECONOMIC IMPACT ANALYSIS OF BC FERRIES' SERVICE REDUCTIONS**

ECONOMIC IMPACT ANALYSIS OF BC FERRIES' SERVICE REDUCTIONS

Prepared for the:

Special Committee on BC Ferries

A committee of the:

Association of Vancouver Island Coastal Communities

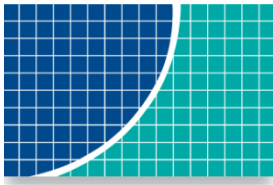
Union of BC Municipalities

Prepared by the:

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February 20, 2014

Special Committee on BC Ferries
c/o Association of Vancouver Island Coastal Communities
525 Government Street
Victoria, BC, V8V 0A8

Dear Special Committee members:

This document is a draft report addressing the likely economic impact of the BC Ferries' proposed service cuts scheduled for implementation in April, 2014. The project has been conducted over a brief three-week timeframe in order to provide information in advance of the service reductions being enacted.

The methodology to conduct the research has involved two separate tactics. One was a review of relevant and available secondary source reports and statistics. The other was an electronic survey of selected coastal community stakeholders to obtain information and opinions regarding the likely impact of the service reductions on coastal community economies.

The research required the cooperation of a number of individuals and agencies, and their assistance is greatly acknowledged. Special mention is made of Ms. Shelley Webber, AVICC Executive Coordinator, who provided significant assistance throughout the project. However, the analysis and conclusions are the responsibility of the undersigned.

Yours sincerely
Economic Planning Group

G D Hall

G David Hall, P.Phys.
Partner

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INTRODUCTION

BACKGROUND

On November 18, 2013, the provincial government announced plans to produce \$14 million net savings across the coastal ferry service network through sailing reductions on 16 routes serviced by BC Ferries. In that same announcement the Province advised that it would be undertaking Community Engagement sessions in the affected communities between November 18 to December 20, 2013 “so that ferry users and other British Columbians can comment on these planned changes.” (Nov. 18 Press Release)

Residents of coastal communities were concerned about the effects these actions could have on the economies and social fabric of their communities. The Association of Vancouver Island Coastal Communities felt that a better understanding of the effects of the service reductions on coastal communities was required.

In early February, four organizations combined efforts and formed a Special Committee on BC Ferries. These bodies were comprised of the Association of Vancouver Island Coastal Communities, the Union of British Columbia Municipalities, plus the Ferry Advisory Committee Chairs and Coastal Regional District Chairs. (See Appendix A for the letter of Introduction and the Committee Terms of Reference.)

AVICC approached the Economic Planning Group (EPG) to explore the possibility of designing a research program to document the impact these planned service cuts could have on coastal communities. As the service reductions were planned for implementation on April 28, 2014, a fact-finding research program needed to be mounted quickly.

OBJECTIVES

The overall intent of the research was to compare the likely changes in economic activity within coastal communities to the planned BC Ferries operating saving from the planned service reductions. The specific objectives of the analysis were to:

- Conduct an analysis to estimate the likely economic significance of the proposed BC Ferries service reductions to impacted communities.
- Produce a written report on the results of the economic analysis.

(It is noted that BC Ferries has announced both service reductions and fare increases to be implemented in April 2014. Although fare increases have been occurring regularly for many years, this is the first time since 2003 that minor route service reductions have been planned. Furthermore, for this analysis to be actionable prior to the announced implementation in April 2014, this research needed to be completed quickly. Consequently, the research addressed here focusses solely on the issue of service reductions.)

RESEARCH PROCESS

The research program used two separate tactics:

- a review of secondary source reports and data descriptive of the coastal communities
- a survey of coastal community stakeholders to obtain information on the likely effects of reduced sailing on the various routes.

SECONDARY SOURCE RESEARCH

Prior to mounting the stakeholder survey, an attempt was made to determine what other information existed. An email request was sent to all Ferry Advisory Committees and Coastal Regional District Chairs to obtain relevant information. This request also asked if these agencies had conducted, or were conducting, any relevant BC Ferries' related surveys.

In addition to this recent or current survey information, the research process was to include historical statistical data on population changes and changes in property values. This information was deemed to be helpful to establish a benchmark of background trends in these two measures. Approaches were made to BC Stats and to the BC Assessment Authority to obtain current statistics on populations and property values. At the time of writing, these agencies were in the process of assembling this information, but the findings were not available.

A letter was also sent to the Minister responsible for BC Ferries, Todd Stone, advising of the establishment of the Special Committee, its proposed work and seeking any research or reports that the Ministry may have available that would assist the Committee in its work. Ministry officials advised that no such broad economic impact assessment was available but referenced a 2002 study undertaken by BC Ferries with respect to Route 40 specifically.

STAKEHOLDER SURVEY

Survey Description

The research for this project took place prior to the implementation of the ferry service cuts. Consequently, the research does not measure what actually happened but rather what was likely to occur in the opinion of the recipients. By design, the research is opinion based, as opposed to utilizing actual statistical measures of changes in economic activity.

The survey was developed to generate opinion on both economic and social outcomes that could occur as a result of ferry service cuts. The questionnaire contained four sections:

Section 1: Contact information for the respondent, specifically recording

- Survey Respondent
- Agency Represented
- Contact Information
- Communities/Islands Affected

This section also contained a drop down menu allowing respondents to select the route to which their comments applied. All sixteen routes were listed along with a “No Specific Route” option for those respondents focusing on broader, system-wide issues. In the case of specific routes, the menu opened a window that listed the planned service cuts, by sailing and season.

Section 2: This section posed the question: *“Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?”* A further comment was provided indicating that the two key measures of economic impact are employment and revenues, and these topics were the focus of this section.

A series of economic sectors were listed following the North American Industry Classification System (NAICS) statistical categories. Two response options were listed for each topic, namely: “No Impact Expected” or “Negative Impact Expected”. If the respondent clicks the negative impact option, a dialogue box appeared requesting comments descriptive of the type or nature of the anticipated impacts.

The list of economic sectors, with sub-sector examples are:

<u>Economic Sectors</u>	<u>Sub-sectors</u>
Agriculture, Forestry, Fishing	Crop production, Animal production, Logging, Aquaculture
Mining, Quarrying	Mineral and other material extractions
Utilities	Electrical power, natural gas, water/sewage systems
Construction	Residential, non-residential, contractors, sub-contractures, infrastructure construction
Manufacturing	Food, beverage, textile, clothing, wood product, paper, metal, machinery, electrical furniture products
Wholesale and Retail Trade	Wholesalers and Distributors, Retail sales of all types

Transportation & Warehousing	Air, water, ground transportation of people and products
Cultural Industries	Publishing, video production, broadcasting, data processing
Finance & Insurance	Banks, Credit Unions, Insurance brokers
Real Estate & Rental	Lessors, auto rentals, consumer and commercial goods rental
Professional, Scientific & Technical	Legal services, accounting, engineering, management, advertising, research
Educational Services	Elementary and secondary schools, colleges, trades training
Health Care	Doctors, dentists, home care, hospitals, care facilities, individual and family services
Arts, Entertainment & Recreation	Performing arts, spectator sports, artists, heritage institutions, recreation facilities
Accommodation & Food Services	Hotels, B&Bs, campgrounds, restaurants, pubs
Public Administration	Federal, provincial, regional or municipal administration
Other Services	Repair and maintenance, personal services, social and business organizations

Section 3: This final section asked respondents to rate the significance of three separate issues that may occur as a result of reduced sailings, namely; reduced population, declining property values, and reduced employment opportunities. The question wording was as follows: *“It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries’ proposed service cuts?”*

Respondents could answer on a five point rating scale from “not at all significant” to “very significant”. A text box was provided to describe the nature of the impacts.

Respondents were also provided the opportunity to comment on any other issues they felt were relevant on the topic of economic impacts likely to be created by the service reductions.

Respondent Selection

Participation in the survey was by invitation to a select group of stakeholders who represented agencies either dealing with ferry related and/or economic issues. The survey invitation list included representatives from the following agencies:

- Ferry Advisory Committee Chairs	13
- Ferry Advisory Committee Members	101
- Regional District Coastal Chairs	13
- Coastal community Chambers of Commerce Executive Directors	39
- Coastal Community Futures Executive Directors	15
- Coastal Community Economic Development Officers	28
Total	209

BC FERRIES SURVEY

The survey described above was initiated on February 11, 2014. On February 12, 2014, BC Ferries announced it was conducting its own survey with the objective of soliciting input on route refinement options. This survey appears to have been designed to counter negative reaction regarding the service cuts announced by government. While still planning to meet the service reductions (and attain the \$14 million in cost savings), community input was being solicited to adjust the sailing schedules to better meet the wishes of coastal community residents.

The survey was posted on the BC Ferries' website (www.bcferrries.com) accessed from the homepage from a tile titled "New Schedule Options". The survey was prefaced by a comment that:

"BC Ferries will implement these service reductions and has developed schedule options that will achieve the savings targets for each given route identified by the government. The new schedules will be in effect as of **April 28, 2014.**"

The survey rationale and instructions as described on the website are:

"BC Ferries is seeking public opinion regarding these schedule options for the affected routes. Please select the link applicable to the route(s) most applicable to you to view the schedule options and complete the short online survey. You may provide feedback on more than one route while in the survey."

For each of 13 routes, sailing options were available through drop down menus. For each route, a "Summary of Province option" was presented, followed by a "Summary of how the BC Ferries schedule option differs from the Province option". It is noted that the

other three routes that comprise the 16 routes for which sailing are reduced are listed - with their revised schedules – but response information is not being solicited.

For the 13 routes for which information was being solicited, the respondent was requested to provide their name and address to ensure the validity of the survey, and to complete the survey by February 21/14.

The survey had route-related questions on:

- Number of times travelled on the selected route
- Primary purpose of trips
- Foot passenger or vehicle traveler
- Description of the options considered and recommended service reduction options of province schedule or BC Ferries schedule
- Open ended comments

And demographic descriptions, as follows:

- Gender
- Age category
- Number of round trips annually on BC Ferries
- Occupation
- Area of residence
- Name and Address

ANALYSIS OF FINDINGS

SECONDARY SOURCE REVIEWS

Internet searches and responses to the request for information from stakeholders revealed a variety of information sources. Although there is broadly based interest and concern about the likely impacts of the service reductions, there is limited survey-based or statistical analysis on the topic. It is noted that there appears to be several surveys in the process of being conducted on coastal service areas, all focusing on the likely impact of the proposed service reductions and/or fare increases. These surveys were either not completed or not in published form at the time of writing.

The key relevant study is the work done for the Tourism Industry Association of British Columbia on BC Ferries Route 40. The report is entitled the *Discovery Coast Tourism Economic Impact Analysis, A Preliminary Assessment of BC Ferries Route 40 (Discovery Coast) Economic Impacts of the BC Tourism Sector*, dated January 6, 2014.

This study involved a survey of businesses in the communities at both ends of the route, as well as along the highway Coast Cariboo Connector Circle Route corridor. The business operator survey included 62 respondents from a mix of tourist sectors including; accommodation, recreation, food & beverage, Aboriginal tourism operators and other travel services. The study concluded the following:

- On average, tourism businesses in the corridor depended on Route 40 travellers for 25% of their annual visitation
- Route 40 had a total visitor volume of just over 4,100 annually, with an average trip duration in the corridor of 12.5 days.
- Total expenditure in the travel route corridors was approximately \$5.6 million.
- This expenditure is responsible for \$780,000 in provincial tax revenue, and supports the equivalent of 110 full-time jobs.
- The provincial taxes generated exceed the annual Route 40 operating subsidy.
- The study found that between 15% and 30% of existing tourism revenues of \$5.6 million would be lost, representing between \$845,000 and \$1.69 million.

AVICC SURVEY OF STAKEHOLDERS

In order to produce information that was directly pertinent to the service cuts being planned, a dedicated survey was designed and implemented. As noted, the focus was entirely on the expected economic impacts of the service cuts. Given that this survey was undertaken prior to the service reductions being implemented, all responses related to the likely effects in the opinion of the respondent. Consequently, all the findings are subjective, producing a qualitative assessment of the anticipated outcomes of the service reductions.

The following invitation was sent out on February 11, 2014, which included the link to the electronic survey:

On February 7th, 2014 the UBCM, AVICC, Ferry Advisory Committee Chairs and Coastal Regional District Chairs [announced the establishment of a Special Committee on BC Ferries](#) in response to the Province's announced service level reductions and increased ferry fares. The Special Committee has hired a consultant to conduct an analysis of the economic impact of the proposed BC Ferries service reductions on communities. To assist with the research and analysis we need your assistance!

You have been identified as a stakeholder who may be able to provide feedback on the possible impacts that BC Ferry service reductions may have on the economic and social health of coastal communities, and other communities that depend on the BC Ferry service.

We have a very tight timeline to undertake this survey, and produce a report before the expected service cuts are to be initiated. Therefore, we ask you to please complete the survey by noon, Friday, February 14th.

Please click on the link below to complete the online survey. The survey is expected to take less than 10 minutes to complete.

Thank you
- Special Committee on BC Ferries

Link to Survey: <https://www.formstack.com/forms/ubcm-bcferries>

If you have any questions about the survey, please contact:

David Hall, Economic Planning Group at dhall@epgvictoria.com, or
Shelley Webber, AVICC at swebber@ubcm.ca

A total of 411 responses were received during the brief four day survey period from mid-day February 11 to noon February 14. This included 41 responses from the selected stakeholders initially invited to participate and 370 from the secondary respondents who received the survey indirectly from the primary recipients.

Responses by Route

Respondents were asked to select the route to which their comments applied. The distribution was as follows:

Table 1: Survey Responses by Route

Route No.	Description	Responses
3	Horseshoe Bay – Langdale	60
6	Vesuvius Bay – Crofton	7
7	Earl's Cove – Saltery Bay	3
8	Horseshoe Bay – Snug Cove	42
9	Tsawwassen – Southern Gulf Islands	45
10	Port Hardy – Mid Coast – Prince Rupert	13
11	Prince Rupert – Skidegate	1
17	Little River - Westview	10
18	Westview – Blubber Bay	10
19	Descanso Bay – Nanaimo Harbour	33
20	Chemainus – Thetis Island – Penelakut Island	6
21	Denman West – Bulkley Bay	41
22	Gravelly Bay – Shingle Spit	4
23	Quathiaski Cove – Campbell River	24
26	Skidegate – Alliford Bay	4
40	Port Hardy – Bella Coola	55
No Specific route		53
Total		411

The overall response rate of over 400 completed surveys over the four day survey interval confirms a significant interest in the topic. The responses were also broadly distributed among the 16 routes.

The most number of responses was 60 was for Route 3 (Horseshoe Bay – Langdale). Another five routes generated more the 40 responses each. (It is noted that for analysis purposes, the six routes with less than ten responses were not included.) However, the responses collected in the open-ended questions in the survey for routes with less than 10 respondents (including routes 6, 7, 11, 20, 22 and 26) have been captured in Appendix E.

Employment Effects

Respondents were asked to indicate if they felt the service reductions would have “no impact” or a “negative impact” on employment. (A positive impact/benefit option was not listed as a circumstance was not envisaged that a reduction in ferry sailings would produce a benefit to the local economy.) Employment refers to jobs in and around the terminal communities and/or islands served by the ferry route in question.

Overall, respondents felt that implication of the service reductions was going to be felt throughout all sectors of the economy, and over all routes. All sectors of the economy were felt to be negatively affected with a range of responses from a low of 34% for the Mining sector to a high of 91% for the Accommodation & Food Services sector. In summary, 60% of respondents expected there to be negative effects on employment from the service cuts.

The sectors deemed to be most at risk in terms of lost employment were the Wholesale & Retail Sector (78%); the Arts, Entertainment & Recreation sector (79%); and the Accommodation & Food Services sector (91%). These sectors largely represent the “tourist industry”, as the businesses in these sectors typically generate a significant proportion of their sales to visitors.

In terms of the anticipated effect of the sailing reductions by route, all routes were felt to be subject to employment declines. The range of negative effects was from 45% for Route 7 (Earl’s Cove – Saltery Bay) to 77% for Route 21 (Denman West – Bulkley Bay).

In addition to the Denman West – Bulkley Bay route, the other routes deemed to be significantly affected were Descanso Bay – Nanaimo Harbour (71%), and Little River – Westview (71%).

The following table depicts the percentage of respondents who expected a negative impact on employment, by route and by economic sector.

Table 2: Percent of Respondents Indicating a Negative Employment Impact, by Sector and Route

Route Number	3	6	7	8	9	10	11	17	18	19	20	21	22	23	26	40	No Route	Average	Average >10
Responses	60	7	3	42	45	13	1	10	10	33	6	41	4	24	4	55	53		
Sector	(Percentage of Respondents Indicating a Negative Impact)																		
Agriculture	60	50	67	29	64	33	100	70	29	76	50	84	33	94	100	55	82	63	62
Mining	40	0	50	15	16	14	100	56	100	9	20	22	0	23	33	6	44	32	34
Utilities	47	0	50	34	43	29	100	25	71	50	50	69	0	60	75	31	44	46	47
Construction	72	50	100	69	84	67	100	75	50	96	83	94	75	73	100	62	88	79	77
Manufacturing	56	0	67	33	52	33	100	88	50	50	60	84	67	36	100	41	73	58	55
Wholesale & Retail	81	75	67	63	92	63	100	89	57	100	60	86	100	67	100	94	87	81	78
Transportation	61	0	100	43	59	43	100	63	43	74	60	80	0	67	67	78	74	60	61
Cultural	63	0	100	39	40	29	100	78	20	76	40	74	50	47	33	56	55	53	52
Finance	41	0	100	15	43	33	100	25	20	38	33	48	0	18	0	58	53	37	33
Real Estate	71	40	100	65	78	71	100	89	57	88	83	94	100	82	50	63	82	77	78
Professional	51	67	100	41	39	17	100	50	0	55	60	70	100	17	25	61	66	54	40
Educational	54	67	100	59	70	33	100	88	86	88	83	91	100	79	100	59	74	78	72
Health Care	74	33	100	61	63	33	100	63	86	92	67	91	50	60	67	66	83	70	71
Arts	79	75	100	66	77	50	100	75	71	100	83	93	100	100	100	78	81	84	79
Accommodation	76	75	100	77	95	100	100	86	100	96	80	97	100	89	75	98	90	90	91
Public Administration	26	0	100	15	38	50	100	29	25	30	40	43	0	11	33	40	47	37	31
Other	54	0	100	45	59	50	100	57	80	86	60	85	100	44	67	75	76	67	64
Average	59	31	88	45	59	44	100	65	56	71	60	77	57	57	66	60	71	63	60

Note: Routes 6, 7, 11, 20, 22 and 26 not included in the Average with greater than 10 responses

Revenue Effects

The second portion of the economic impact assessment was the topic of revenues. This topic focused on the impacts on business sales or revenues likely to result from the sailing reductions. Again, the response options were limited to “no impact expected” and “negative impact expected”

The responses to this question were similar to those for the employment impact question, as respondents tended to see strong relationship between businesses losing revenue and as a result, reducing employment.

Respondents indicated that the sailing reductions would negatively affect all sectors of the economy and over all routes. Eliminating the routes that garnered less than ten responses, the range of responses was from 37% feeling the service reductions would affect the Finance sector, to 90% of respondents expressing concern that the Accommodation & Food Services sector would be impacted. Overall, 57% of respondents felt there would be negative impacts to businesses in the ferry service communities caused by the sailing reductions.

The sectors of economy felt to be most likely negatively affected were Accommodation & Food Services (90%), Real Estate & Rentals (81%), and Arts, Entertainment & Recreation (78%). As with the Employment-related analysis, it would be the tourism-dependent businesses that were felt to be most at risk.

All routes were expected to be subject to declines in business revenue. Taking out the routes with fewer than 10 responses, the range on expected impacts was lowest on Route 8 (Horseshoe Bay – Snug Cove) at 43%, to Route 21 (Denman West – Bulkley Bay) at 77%.

Other routes most expected to suffer declines in business activity as a result of sailing cuts were Route 19 (Descanso Bay – Nanaimo Harbour) at 71% and Route 40 (Mid Coast – Bella Coola) at 61%.

The following table depicts the percentage of respondents who felt that the revenue of businesses would be negatively affected, by route and by economic sector.

Table 3: Percent of Respondents Indicating a Negative Revenue Impact, by Sector and Route

ROUTE #	3	6	7	8	9	10	11	17	18	19	20	21	22	23	26	No 40 Route	Average	Average >10
Responses	60	7	3	42	45	13	1	10	10	33	6	41	4	24	4	55	53	
Sector	(Percentage of Respondents Indicating a Negative Impact)																	
Agriculture	58	33	67	28	60	50	100	75	17	86	50	85	67	81	75	56	83	63
Mining	40	0	50	15	16	14	100	56	100	9	20	22	0	23	33	6	44	32
Utilities	38	0	50	20	46	29	100	29	29	26	40	71	0	42	75	27	42	39
Construction	60	50	100	68	80	60	100	75	43	96	100	94	67	71	75	64	86	76
Manufacturing	47	0	67	28	52	43	100	75	50	42	40	79	50	30	100	45	76	54
Wholesale & Retail	72	100	67	61	92	75	100	83	50	96	60	86	100	55	100	93	87	81
Transportation	56	50	100	42	60	50	100	57	33	74	60	85	0	33	100	83	66	62
Cultural	50	0	100	33	37	17	100	75	20	81	40	76	0	54	33	54	52	48
Finance	35	0	100	15	42	33	100	25	20	38	33	50	0	20	0	56	53	37
Real Estate	72	80	100	77	78	57	100	88	67	93	100	94	100	93	67	75	89	84
Professional	42	67	100	37	40	17	100	43	0	55	60	71	100	10	25	62	60	52
Educational	50	50	100	45	64	17	100	100	60	95	100	88	100	50	75	60	63	72
Health Care	65	0	100	50	59	33	100	67	67	90	50	89	0	30	100	60	64	60
Arts	74	80	100	69	81	50	100	57	75	100	80	93	100	100	100	78	79	83
Accommodation	71	100	100	73	94	100	100	86	100	96	75	97	100	92	100	98	92	93
Public Admin	23	0	100	21	35	50	100	29	0	32	40	45	0	22	33	43	43	36
Other	55	33	100	45	56	57	100	57	40	90	60	83	100	43	67	78	72	67
Average	53	38	88	43	58	44	100	63	45	71	59	77	52	50	68	61	68	61

Note: Routes 6, 7, 11, 20, 22 and 26 not included in the Average with greater than 10 responses

Socio-Economic Effects

Three topics were included in the socio-economic analysis, namely: reduced populations, declining property values, and reduced employment opportunities. These issues were selected for inclusion in the survey since they provide insights into the overall health of the ferry terminal and island communities served by BC Ferries.

Responses were obtained on a range of responses as follows:

<u>Significance Rating</u>	<u>Numerical Value</u>
Not at all significant	1
Not Significant	2
Neutral	3
Somewhat Significant	4
Very Significant	5

Overall, respondents felt the socio-economic measures of ferry sailing cuts were going to be highly significant, with an average value of 4.6 overall, and a slightly lower, but still significant rating of 4.2. The average significance value for the three topics was as follows:

<u>Socio-Economic Measures</u>	<u>Numerical Value</u>	<u>Numerical Value >10 Responses</u>
Reduced Population	4.6	4.2
Declining Property Values	4.6	4.2
Reduced Employment Opportunities	4.6	4.2

Reduced Population

Analyzed by route, and removing the routes with fewer than 10 responses, the significance rating averages were between 4.4 and 4.9.

Declining Property Values

The range in property value significance was between 3.8 and 4.9.

Reduced Employment Opportunities

The range in the assessment of the significance of reduced employment opportunities was between 4.3 and 4.9.

The significance rating by individual route was as follows:

Table 4: Socio-Economic Significance Rating by Route

Route	Count	Reduced Population	Declining Property Values	Reduced Employment Opportunities
Route 3 - Langdale to Horseshoe Bay	60	4.4	4.5	4.3
Route 6 - Vesuvius Harbour to Crofton	7	4.4	4.4	4.3
Route 7 - Earls Cove to Saltery Bay	3	4.7	4.7	4.7
Route 8 - Horseshoe Bay to Bowen Island	42	4.4	4.6	4.3
Route 9 - Tsawwassen to Southern Gulf Islands	45	4.8	4.9	4.8
Route 10 - Port Hardy to Mid-Coast to Prince Rupert	13	4.2	3.8	4.7
Route 11 - Skidgate to Prince Rupert	1	4.0	4.0	5.0
Route 17 - Comox to Powell River	10	4.8	4.6	4.6
Route 18 - Texada Island to Powell River	10	4.9	5.0	4.3
Route 19 - Gabriola Island to Nanaimo Harbour	33	4.9	4.9	4.9
Route 20 - Chemainus to Thetis to Penelakut	6	4.7	4.8	4.7
Route 21 - Buckley Bay to Denman Island	41	4.9	4.9	5.0
Route 22 - Hornby Island to Denman Island	4	4.8	5.0	4.8
Route 23 - Quadra Island to Campbell River	24	4.6	4.5	4.8
Route 26 - Skidegate to Alliford Bay	4	5.0	4.8	5.0
Route 40 - Port Hardy - Mid-Coast-Bella Coola	55	4.7	4.5	4.6
No Specific Route	53	4.5	4.7	4.6
Total	411	4.61	4.61	4.67
Average > 10 Responses		4.24	4.23	4.24

Note: Routes 6, 7, 11, 20, 22 and 26 not included in the Average with greater than 10 responses

CONCLUSIONS

The intent of the analysis was to compare the likely loss in economic activity in the coastal/island communities with the savings to be gained by BC Ferries' sailing reductions. Based on the nature of this opinion-based survey, it was not possible to quantify the size of the economic impacts. Including the pending statistical data on population changes and residential property values should provide further insights.

However, based on respondent opinion, the survey revealed that there is broadly based concern about the likely economic impacts the reduced sailing schedules will create.

Measured by employment impacts, nearly two-thirds of respondents (63%) expressed concern that the ferry sailing reductions would have a negative impact. These effects were reported to occur in the terminal communities and islands throughout all routes.

These impacts were expected to occur throughout all sectors of the economy with the most serious impacts occurring in the businesses that comprise the tourism industry.

A similar finding resulted from respondent's expectation of the impacts on business sales or revenues. Over one-half of respondents (57%) indicated that the sailing reductions would produce negative impacts for business.

These impacts were reported to be likely to occur throughout the BC Ferries service area and among all sectors of the economy. Again, the service sector businesses serving both residents and visitors would likely be most affected.

Measures of the likely significance of socio-economic issues were equally emphatic and broadly based. Respondents rated the significance a 4.2 out of five for the three measures of reduced population, declining property values and reduced employment opportunities.

The opinion-based nature of this survey does not allow this link to be confirmed or quantified. However, respondents generally believe there is a very strong link between declines in these socio-economic factors and reduced ferry sailings.

LIST OF APPENDICES

A	Steering Committee on BC Ferries Terms of Reference
B	UBCM Member Release
C	Survey Questionnaire
D	Survey Cover Sheet
E	Open Ended Question Survey Responses on Routes with Less Than 10 Respondents
F	Proposed Next Steps

Special Committee on BC Ferries Terms of Reference January 31, 2014

Background

In November 2013 the BC Government announced significant service reductions to minor routes to the BC Ferry Service, effective April 2014.

A second round of community consultations by the Government of BC were executed after the announced cuts to services were made public. Both public and local governments reactions have been swift and vocal on the cuts to the minor ferry routes. The main concerns include; the lack of meaningful public consultation, as well as the absence of a full social-economic impact assessment to measure (qualitatively and quantitatively) the importance of the BC Ferry system to local communities.

There has been support through resolutions passed by the membership of both the UBCM and the AVICC to provide a collective and united voice to the Province of BC on this matter. Resolutions have confirmed the position of the ferry system as an essential component of the provincial highway system and should be supported as such, as well as the importance of the ferry system to both the economic and social health of local communities.

On (January 27, 2014) The AVICC Executive passed a motion to support an assessment of BC Ferry Service Reductions and Rate Increases on member communities. The AVICC Executive also passed a motion on to strike a Special Committee on BC Ferries.

Purpose:

The purpose of the Special Committee on BC Ferries is to:

- Determine the geographic scope and economic sectors to be analyzed;
- Oversee the work of a consultant who will undertake the work necessary to complete a position paper documenting the likely social and economic significance of the BC Ferries cutbacks and fare increases to communities directly impacted by these changes;
- The Committee may also be required to report out on work of the Committee at the special plenary session on BC Ferries at the 2014 AVICC AGM & Convention;
- When authorized by the Special Committee by consensus, members of the committee may respond as needed to Provincial and other announcements related to BC Ferry service levels and rate increases, during the term of the Special Committee.

Members and Support:

- The Committee membership will be composed of select members of the AVICC Executive, select members of the UBCM Executive, select members of the RD Coastal Chairs Group, and a member of the BC Ferry Advisory Committee Chairs, and will self select a Chair for the Committee;
- Staff support to the Committee will be provided by AVICC and UBCM, and the Committee may also contract with any person, so long as that contract is within its budget allocation, and approved by AVICC's President, and UBCM's Executive Director.

Expert Members and Invited Guests

The Special Committee on BC Ferries may, from time to time, require experts, academics or other government/ voluntary sector representatives to attend meetings, as presenters, advisors or observers because of their knowledge of the subject. The Special Committee on BC Ferries will agree to such invitations in advance.

Confidentiality

Members are expected to be open and candid in discussing items before the table. For this reason it is important to maintain confidentiality. Members are committed to respecting the personal privacy of the Special Committee on BC Ferries group participants and agree not to disclose personal information or views expressed during meetings. Deliberations may be shared within the various agencies represented by the Special Committee on BC Ferries but should remain publicly confidential until there is general agreement and consensus to make them public. Approved minutes will form the public record for the meetings.

Products/Deliverables:

The Committee will prepare a report for the AVICC Executive in sufficient time for Executive's consideration at its March 2014 meeting, and the Committee may prepare interim reports as it considers appropriate.

Resources:

The AVICC and UBCM will share equally the following costs of the Committee, up to the maximum budget allocation: consultant fees and expenses associated with the development of a position paper; meeting and other operating expenses of the committee; and any other expenses specifically approved, in advance, by the AVICC President, and UBCM Executive Director.

Term:

The term of the Committee is from February 1, 2014 to April 30, 2014. The AVICC Executive may consider extensions to this term on an annual basis.



APPENDIX B

Special Committee on BC Ferries

Feb 7, 2014

British Columbia local governments have formed a Special Committee to examine the economic significance of BC Ferries cutbacks and fare increases. The Special Committee on BC Ferries held its first meeting earlier today and adopted their Terms of Reference.

"B.C. local governments are saying it is time to take a look at how reductions in service and fare increases will impact B.C. communities", said UBCM President Rhona Martin. "Ferries play a vital role in the province-wide transportation system that is a key support for the B.C. economy. The Special Committee will be doing some fresh research on this issue, and I am inviting communities to get involved and contribute to the process."

The Special Committee has been jointly established by the Association of Vancouver Island and Coastal Communities and the Union of B.C. Municipalities, along with the Ferry Advisory Committee Chairs and Coastal Regional District Chairs. The Special Committee will oversee the work of a consultant who will conduct an analysis to estimate the economic significance of the proposed BC Ferries service reductions on communities.

The analysis is intended to include economic sectors that are impacted by BC Ferries access. This will include primary and secondary sectors, and will likely focus on tourism, retail and manufacturing. The intent is to focus on jobs and revenues as the key economic measures, with additional commentary on other impacts identified through the research. These other impacts are likely to include the discussion of the economic effects of social changes such as reduced population and restricted access to employment opportunities.

All research and analysis to be conducted in February with a draft report scheduled for late February.

The members on the Special Committee include:

- Mayor Larry Cross, AVICC President
- Tony Law, Co-Chair, Ferry Advisory Committee Chairs, Hornby Island Trustee, Islands Trust
- Chair Colin Palmer, Coastal Regional District Chairs, Powell River Regional District
- Chair Jim Abram, Coastal Regional District Chairs, Strathcona Regional District
- Chair Joe Stanhope, Past President AVICC / Coastal Regional District Chairs, Nanaimo Regional District
- Chair Sheila Malcolmson, Coastal Regional District Chairs/Islands Trust
- Chair Art Kaehn, UBCM Community Economic Development Committee Chair, Regional District Fraser Fort George

- Chair Barry Pages, Skeena Queen Charlotte Regional District
- Chair Garry Nohr, Sunshine Coast Regional District
- Councillor Claire Moglove, AVICC Executive, UBCM Third Vice-President, City of Campbell River
- Councillor Barbara Price, Second Vice President AVICC Executive, Town of Comox

Members wishing to share information in support of the Special Committee can contact:

Marie Crawford, Associate Executive Director, UBCM

EM: mcrawford@ubcm.ca

Or

Shelley Webber, Executive Coordinator, AVICC

EM: swebber@ubcm.ca

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APPENDIX C

Special Committee on BC Ferries: Survey on the likely economic effects of BC Ferries' proposed service reductions

The Special Committee on BC Ferries have developed this survey to inform a study to assess the likely social and economic impacts of the recently announced BC Ferries service reductions on local communities.

Note: If you are evaluating multiple routes, and you expect the impacts to vary considerably per route - please consider completing an individual survey per route.

***The proposed ferry schedules that have been posted on this survey are current as of December 2013. BC Ferries is expected to release a revised proposed schedule to their website on February 12th.*

Email:

Position/Title:

Agency Represented:

Community/Island Affected:

Please Select the Route You Will Be Evaluating:

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors? (Note: the two key measures of economic impacts are typically revenues and employment. The sectors listed are standard categories, used for statistical purposes).

Agriculture, Forestry, Fishing

Crop production, animal production, logging, aquaculture

Employment – Agriculture, Forestry, Fishing
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Agriculture, Forestry and Fishing:**

Revenues – Agriculture, Forestry, Fishing

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Agriculture, Forestry and Fishing:**

Mining, Quarrying

Mineral and other material extractions

Employment – Mining, Quarrying

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Mining, Quarrying:**

Revenues – Mining, Quarrying

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Mining, Quarrying:**

Utilities

Electrical power, natural gas, water/sewage systems

Employment – Utilities

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Utilities:**

Revenues – Utilities

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Utilities:**

Construction

Residential, non-residential, contractors, sub-contractors, infrastructure constructions

Employment – Construction

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Construction:**

Revenues – Construction

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Construction:**

Manufacturing

Food, beverage, textile, clothing, wood product, paper, metal, machinery, electrical, furniture products

Employment – Manufacturing

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Manufacturing:**

Revenues – Manufacturing

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Manufacturing:**

Wholesale and Retail Trade

Wholesalers and distributors, retail sales of all types

Employment – Wholesale and Retail Trade

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Wholesale and Retail Trade:**

Revenues – Wholesale and Retail Trade

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Wholesale and Retail Trade:**

Transportation & Warehousing

Air, water, ground transportation of people and products

Employment – Transportation & Warehousing

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Transportation & Warehousing:**

Revenues – Transportation & Warehousing
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Transportation & Warehousing:**

Cultural Industries

Publishing, video production, broadcasting, data processing

Employment – Cultural Industries
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Cultural Industries:**

Revenues – Cultural Industries
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Cultural Industries:**

Finance & Insurance

Banks, credit unions, insurance brokers

Employment – Utilities
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Finance & Insurance:**

Revenues – Finance & Insurance
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Finance & Insurance:**

Professional, Scientific & Technical

Legal services, accounting, engineering, management, advertising, research

Employment – Professional, Scientific & Technical
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Professional, Scientific & Technical:**

Revenues – Professional, Scientific & Technical
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Professional, Scientific & Technical:**

Educational Services

Elementary and secondary schools, colleges, trades training.

Employment – Educational Services
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Educational Services:**

Revenues – Educational Services
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Educational Services:**

Health Care & Social Assistance

Doctors, dentists, home care, hospitals, care facilities, individual and family services

Employment – Health Care & Social Assistance
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Health Care & Social Assistance:**

Revenues – Health Care & Social Assistance
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Health Care & Social Assistance:**

Arts, Entertainment & Recreation

Performing arts, spectator sports, artists, heritage institutions, recreation facilities

Employment – Arts, Entertainment & Recreation
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Arts, Entertainment & Recreation:**

Revenues – Arts, Entertainment & Recreation
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Arts, Entertainment & Recreation:**

Accommodation & Food Services

Hotels, B & Bs, campgrounds, restaurants, pubs

Employment – Accommodation & Food Services
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Arts, Accommodation & Food Services:**

Revenues – Accommodation & Food Services
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Arts, Accommodation & Food Services:**

Public Administration

Federal, provincial, regional or municipal administration

Employment – Public Administration
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Public Administration:**

Revenues – Public Administration
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Public Administration:**

Other Services

Repair and maintenance, personal services, social and business organizations

Employment – Other Services
No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Employment for Other Services:**

Revenues – Other Services

No Impact Expected or Negative Impact Expected

If Negative Impact Expected - **Describe Negative Impact on Revenues for Other Services:**

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate significance of proposed service cuts to REDUCED POPULATION

- Not At All Significant
- Not Significant
- Neutral
- Somewhat Significant
- Very Significant

Describe the nature of the impact on REDUCED POPULATION

Rate significance of proposed service cuts to DECLINING PROPERTY VALUES

- Not At All Significant
- Not Significant
- Neutral
- Somewhat Significant
- Very Significant

Describe the nature of the impact on DECLINING PROPERTY VALUES

Rate significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

- Not At All Significant
- Not Significant
- Neutral
- Somewhat Significant
- Very Significant

Describe the nature of the impact on REDUCED EMPLOYMENT OPPORTUNITIES

Rate significance of proposed service cuts to OTHER IMPACTS

- Not At All Significant
- Not Significant
- Neutral

- Somewhat Significant
- Very Significant

Describe the nature of the impact on OTHER IMPACTS

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

SURVEY COVER SHEET

On February 7th, 2014 the UBCM, AVICC, Ferry Advisory Committee Chairs and Coastal Regional District Chairs [announced the establishment of a Special Committee on BC Ferries](#) in response to the Province's announced service level reductions and increased ferry fares. The Special Committee has hired a consultant to conduct an analysis of the economic impact of the proposed BC Ferries service reductions on communities. To assist with the research and analysis we need your assistance!

You have been identified as a stakeholder who may be able to provide feedback on the possible impacts that BC Ferry service reductions may have on the economic and social health of coastal communities, and other communities that depend on the BC Ferry service.

We have a very tight timeline to undertake this survey, and produce a report before the expected service cuts are to be initiated. Therefore, we ask you to please complete the survey by noon, Friday, February 14th.

Please click on the link below to complete the online survey. The survey is expected to take less than 10 minutes to complete.

Thank you
- Special Committee on BC Ferries

Link to Survey: <https://www.formstack.com/forms/ubcm-bcferries>

If you have any questions about the survey, please contact:

David Hall, Economic Planning Group at dhall@epgvictoria.com, or
Shelley Webber, AVICC at swebber@ubcm.ca

APPENDIX E

SURVEY RESPONSES - <10 RESPONDENTS

ROUTE 6 - CROFTON TO SALTSRING

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

"We have family on Saltspring (my Grandmother, who lives alone) and we travel almost every week via this route to see her. Taking away these sailings will mean we can't have her over for dinner or vice versa and will greatly impact our family. These island routes are essential to our community and the rising costs (over the past ten years it's risen significantly) and reduced sailings directly and negatively impacts both our family and our communities. These routes are like roads, when you cut off a road, you effect all the communities involved."

"There are four effects of these reductions: 1. Economic loss to residents of Saltspring Island who work on Vancouver Island and return home in the evening. 2. Cultural and educational loss to residents of Saltspring Island that attend various levels of school or participate in cultural or recreational activities on Vancouver Island after school/business hours. 3. Loss of the ability of families and friends to have dinner or attend evening events together without the expense of an overnight stay. This applies to both Saltspring island and Vancouver Island residents in the general Cowichan Valley area. 4. Residents of Saltspring Island will have their ability to participate in many Saturday morning events or recreational activities on Vancouver Island severly reduced. It may also reduce the number of visitors to Saltspring Island for the Saturday market, with some negative economic impact."

"They will decimate our high school athlectics program, which relies heavily on the last two ferries to return teams from tournament games, and have a devastating impact on athletes involved in high performance leagues or special training programs. At the same time, and partly as a result of the above, they will make the island less attractive as a place for families to settle. Commuting will become more difficult. Property prices will drop."

"The above cuts would be a huge problem for commuters, students and others. However. the revisions are not nearly as damaging. I will be answering the questionnaire on the basis of the Feb 12th revisions."

"The effect will be negative. A reduction in traffic on the route and a reduction in revenue. Inconvenience for some travellers dependent on the axed sailings and a reduction in trade with Vancouver Island."

"I've just reviewed the revised proposal and it's certainly preferred. However, I still strongly object to removing the last sailing of the day and leaving our only option to

Survey Responses - <10 Respondents

return to the Island be at 7:30 p.m. I can't imagine the hue and cry if the government decided to close down the highways throughout the province each evening at 7:30 p.m. in order to save on maintenance costs by reducing traffic."

"People with jobs will be negatively affected Decreased use of the ferries due to not being able to attend functions as can't return to the island same day. Seniors will be using the ferries less due to the increased cost. I always plan to use the ferry Mon to Thurs.

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

EMPLOYMENT – Agriculture, Forestry, Fishing:

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Less sailings means less flexibility for transporting these goods and for workers to move between the islands to accept open positions. Many of our natural resources jobs require a great deal of flexibility and move around in location."

"The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology."

REVENUES – Agriculture, Forestry, Fishing:

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology."

EMPLOYMENT – Construction

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

“The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology. Lots of commuting tradesmen going on and off the island will be hurt by the reduction in services.”

REVENUES – Construction

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“For the Southern Gulf Islands such as Saltspring, often contractors are brought over from Vancouver Island to meet specialty construction needs. Now they won't be able to have the same level of flexibility for completing that work and might have to resort to using local services only, which will severely limit the revenue potential.”

“The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology. Lots of commuting tradesmen going on and off the island will be hurt by the reduction in services.”

EMPLOYMENT – Wholesale and Retail Trade

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Possible impact to Saltspring Island Saturday market and general tourism during off-peak.”

“The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology.”

REVENUES – Wholesale and Retail Trade

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“General retail impact to Saltspring Island during off-peak Saturday mornings.”

“Fewer mid-day sailings -- more waiting for ferries by supply trucks.”

Survey Responses - <10 Respondents

“The extent of any negative economic impact would need to be measured by an economic impact assessment which BCF and the liberal government steadfastly refuse to undertake, presumably because they do not wish facts to get in the way of ideology.”

EMPLOYMENT – Real Estate

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“The ferry dependent communities have already seen their real estate values decline significantly as a result of increased ferry fees. A reduction in services and increased fare hikes will aggravate real estate values, house sales and incomes for realtors.”

REVENUES – Real Estate

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Harder to access the islands will make it less desirable to live there as islanders have to travel off the island for many services. This will mean less buyers for island homes.”

“Fewer ferry options = less demand for real estate.”

“The ferry dependent communities have already seen their real estate values decline significantly as a result of increased ferry fees. A reduction in services and increased fare hikes will aggravate real estate values, house sales and incomes for realtors.”

“As access to the Island becomes even more restricted, its attraction becomes less, thereby reducing property values.”

EMPLOYMENT – Professional, Scientific & Technical

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“This is one of the types of employment that often requires work after normal business hours. Any Saltspring Islanders working in these professions on Vancouver

Survey Responses - <10 Respondents

Island may face loss of employment or additional personal expense for over night stays during the week.”

“These are largely commuting industries depending on ferry transport to access employment on Van Isle.”

REVENUES – Professional, Scientific & Technical

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Potential loss of employment or restricted opportunities for Saltspring Islanders.”

“These are largely commuting industries depending on ferry transport to access employment on Van Isle.”

EMPLOYMENT – Educational Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Many Saltspring students attend school on Vancouver Island and reduction in evening services would prevent these students from participating in after hours activities. It would also prevent parents from attending evening events at their children's schools.”

REVENUES – Educational Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Possible loss of revenue to Duncan / Cowichan Valley private schools and recreational facilities.”

EMPLOYMENT – Arts, Entertainment & Recreation

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Employees will all be required to be local to work on events that run in the evening. We'll lose specialized artists and workers that use these sailings to travel between

Survey Responses - <10 Respondents

Vancouver Island and Saltspring for special events, or even for more regular events, such as Theatre.”

“Almost a complete inability for Saltspring Island residents to participate in any Vancouver Island arts, entertainment and recreation evening opportunities.”

REVENUES – Arts, Entertainment & Recreation

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“If evening sailings aren't running, people won't have the option to stay later on either island for evening entertainment and arts. An example would be the Chemainus Theatre Festival, now islanders from Saltspring won't be able to attend any evening performances and still get home that night, they'll have to overnight somewhere or won't go at all.”

“Definitie lack of revenue for Duncan and surrounding area arts, entertainment and recreation facilities and businesses.”

“It naturally follows that reduced access to/from the Island will reduce opportunities for visitors and residents to visit and spend money on events, local businesses, etc. This will be an impact on both Salt Spring and Vancouver Island (although to a much lesser degree on V.I.)”

EMPLOYMENT – Accommodation & Food Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Possible loss of employment for Vancouver island workers that typically work later than normal business hours in these industries on Saltspring island.”

“Far less visitors already as a result of ferry hikes. Will get a lot worse.”

REVENUES – Accommodation & Food Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Less visitors in peak hours such as dinner time will reduce the amount of revenue, both from visitors from Vancouver Island and for tourists, who make up a large amount of revenue on Saltspring Island.”

Survey Responses - <10 Respondents

"Loss of employment revenue for Vancouver Island workers employed in this industry on Saltspring Island."

"Possible drop in visitors"

"These are largely commuting industries depending on ferry transport to access employment on Van Isle."

REVENUES – Other Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Harder to access the islands will make it less desirable to live there as islanders have to travel off the island for many services."

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate the significance of proposed service cuts to REDUCED POPULATION

5 Very Significant

Describe the Nature of the Impact on REDUCED POPULATION

"Saltspring Island is already very hard to access, the costs have risen so much in the past 10 years. I know many families who have been forced to leave the island due to the cost of transportation with BC Ferries, including our family. With reduced services and increased cost, BC Ferries will be cutting the community off and making it a less desirable place to live. This has a huge impact on the community, as the people really do make this island the special location that it is. However, if this population doesn't have access to Vancouver Island, where a majority of goods and services are available, plus they can't afford to pay the rising ferry costs, we will simply lose population. It's very frustrating to those who love the island and would like to stay there."

"Historically, Salt Spring has been the "metropolis" of the gulf islands, where people who want infrastructure and facilities settle. part of that is having a school that offers a broad range of programs and sports. Fewer people will not want to bring up families in a place where this is no longer the case, or where they feel trapped by the schedule."

Survey Responses - <10 Respondents

"Cost of living on islands already higher, yet we earn on average \$10k per household less than lower mainland, we have much higher self employment rate and much lower unemployment. Increased cost of living because of transport, rises in commodity prices including gas, will drive population down. It's already declining in gulf islands as a result of liberal party policies."

"There will be decreased population due to increasing costs of ferries and service cuts"

Rate the significance of proposed service cuts to REDUCED POPULATION

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED POPULATION

"A number of Saltspring Island residents will be forced to move to Vancouver Island for employment and educational purposes."

"Further limiting access on/off the Island makes it a less attractive place to live."

Rate the significance of proposed service cuts to REDUCED POPULATION

3 Neutral

Describe the Nature of the Impact on REDUCED POPULATION

"SSI is more self sufficient. May be slowdown in population growth but not reduction."

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES

5 Very Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

"The combination of reduced service and increased prices will make people less inclined to buy here, and the market for property will further soften."

"The 20% reduction seen in the past five years will accelerate as the economy atrophies and businesses close. The popularity of the island as a retirement destination will diminish depressing property values further and we will see more derelict property as bankruptcies snowball."

"Declining property values due to reduced population"

Survey Responses - <10 Respondents

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES

4 Somewhat Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

"If the island becomes a less desirable place to live, less people will buy to live there locally. Property value might still stay the same, but it will shift towards non-local/vacation buyers, which will have a large and negative impact on the island community."

"Obviously with the proposed severe reductions in ferry service, there will be less new residents moving to Saltspring Island and consequently a reduction in property prices."

"Slower growth = less demand. but other factors have impacted property values as well."

"Further limiting access on/off the Island makes it a less attractive place to live."

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

5 Very Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"Locals on Saltspring often commute to Victoria and Vancouver Island for work and reducing services just makes that even more difficult. Many people can't afford to live on Saltspring with the types of jobs that are available locally, they're working on the island."

"Without evening ferries, the employment opportunities for Saltspring Island residents on Vancouver Island will be significantly reduced."

"Tourism, a major local revenue stream will be adversely affected, as tourists like freedom of movement, and to be able to make a long day trip. Additionally all local businesses will suffer as the population contracts. Additionally, many people commute to work off island. This will become less possible/attractive with reduced service."

"Less money in a shrinking economy means less jobs. Seems to be obvious to everyone but the liberal government."

Survey Responses - <10 Respondents

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"Further limiting access on/off the Island makes it a less attractive place to live, thereby shrinking the economy in all ways."

Rate the significance of proposed service cuts to OTHER IMPACTS

5 Very Significant

Describe the Nature of the Impact on OTHER IMPACTS

"Many families and friends are split between Saltspring Island and Vancouver Island. Without evening ferries between Crofton and Vesuvius, normal family and social ties cannot be maintained to the same degree. For example I won't be able to have dinner with my 83 year old mother who lives alone without it being an overnight trip for either of us."

"As incomes are squeezed negative environmental impacts will rise. More tree cutting because residents can't afford electric or gas heating. More refuse dumped in the natural environment to avoid paying dump fees. More cars abandoned rather than disposed of responsibly. More vandalism as a result of rising unemployment and more crime."

"tourists cannot afford the increased costs. This of course affects all businesses on SS. The timing of the ferries also affect off island folks decision to travel to the island or NOT."

Rate the significance of proposed service cuts to OTHER IMPACTS

4 Somewhat Significant

Describe the Nature of the Impact on OTHER IMPACTS

"General attitude that rising fares and service cuts are making living on the island more of a hassle and less appealing."

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

Survey Responses - <10 Respondents

"It's so sad that BC Ferries can have such an impact on our islands, but these ferries are our roads, and we require them to connect our communities and to connect our families and local economies. It would be a tragedy to cut and destroy these relationships just because the routes are pricey to run. We all know BC Ferries makes enough money to sustain these routes, just look at the ridiculous ticket price increases from over the years - they must be running a profit since ferry costs have doubled."

"The uncertainty regarding future fares and service levels becoming a general drag on confidence in future of island residency."

"Commission independent economic and social impact assessments and you won't have to rely on people guessing. It's called due diligence. It was once something governments did."

"I am not good with words. I have lived here since the 70's and had hoped to stay here forever. The ferry service has been my sole reason for planning to leave. I know a number of others who have similar plans. If the ferries were accepted to be part of the highway system with a slight fee such as you would pay crossing a new bridge, I think this would keep the island alive and well."

ROUTE 7 - EARLS COVE TO SALTERTY BAY

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

"Maintaining connectivity to Route 3 (Langdale/Horshoe Bay) and the ability to do a full day trip to Vancouver and back is important to local businesses shipping goods and residents accessing medical specialists. It is important that a 10 pm sailing departing from Earls Cove is maintained. Reducing the ability to do a full day trip adds significantly to the cost of doing business and living."

"If you cut the last sailing of the evening then those that are traveling from Horseshoe Bay would have to be on the 5:30 sailing in order to connect through to Powell River. The 5:30 sailing out of Horseshoe Bay is a very busy commuter run, Monday through Friday . Add to this the fact that you would be traveling through rush hour traffic in order to get to Horseshoe Bay Terminal. I can see this affecting our community negatively and with a higher price tag for accommodations if you miss this very busy sailing. This will affect local businesses which travel daily to Vancouver in order to conduct their business."

"Once a day is never going to be enough! Have you ever truly looked at how many people actually take each and every ferry every day? I have taken that ferry for

Survey Responses - <10 Respondents

years and every different time I have left and returned to Powell River, the parking lot waiting for the ferry has been packed, there are numerous times during the "peak" times that the ferry has left cars behind . . . and you actually believe once a day is going to be able to handle the traffic! Most people travel during the day (ie; from 7am in the morning and on so that they can get to Vancouver, or back home to Powell River during the day and still get their business or shopping done) and you want to make it so they can't leave to Vancouver or go home to Powell River at Night only! The impact of that would bring all travel to a STOP!!! Incredibly inconvenient and then people wouldn't travel - thus, total loss economically for both sides of the ferry route, as well as all the Senior's in Powell River who would never again have visits from their family that was forced to move away from Powell River for jobs. Please please please DO NOT make only one sailing for Powell River - minimum required is 4!!!! Absolute minimum!!!!"

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

EMPLOYMENT – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"A number of local food production businesses rely on the ability to do a full day trip to Vancouver to deliver product. Reducing that ability adds cost and impacts employment levels."

"Impossible for business to ship and have product reach destination during "regular business hours" - will have a "snowball effect" - shipping stops, employment affected at shipping company, lays off workers, all peripheral industry affected and lay offs happen. No taxes being paid, nothing to admin within towns, towns shutting down, no health care \$\$ for residents, more people move out of town to places where reliable shipping & traffic is found. Cities getting more congested, small towns suffering and becoming ghost towns. Etc., Etc."

REVENUES – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"A number of local food production businesses rely on the ability to do a full day trip to Vancouver to deliver product. Reducing that ability adds cost."

EMPLOYMENT – Construction

Survey Responses - <10 Respondents

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Less construction, less jobs”

REVENUES – Construction

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Less construction , less revenue”

EMPLOYMENT – Manufacturing

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of local manufacturing businesses rely on the ability to do a full day trip to Vancouver to deliver product. Reducing that ability adds cost and impacts employment levels.”

REVENUES – Manufacturing

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of local manufacturing businesses rely on the ability to do a full day trip to Vancouver to deliver product. Reducing that ability adds cost and impacts profitability.”

EMPLOYMENT – Wholesale and Retail Trade

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of businesses rely on the ability to do a full day trip to Vancouver to deliver product and pick up supplies and parts. Reducing that ability adds cost and impacts employment levels.”

REVENUES – Wholesale and Retail Trade

Survey Responses - <10 Respondents

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of businesses rely on the ability to do a full day trip to Vancouver to deliver product and pick up supplies and parts. Reducing that ability adds cost and affects profitability.”

EMPLOYMENT – Transportation & Warehousing Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of businesses rely on the ability to do a full day trip to Vancouver to deliver product and pick up supplies and parts. Reducing that ability adds cost and impacts employment levels.”

“High cost for transporting goods if unable to travel return trip to Vancouver , this cost will be passed onto the consumer.”

REVENUES – Transportation & Warehousing Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A number of businesses rely on the ability to do a full day trip to Vancouver to deliver product and pick up supplies and parts. Reducing that ability adds cost and affects profitability.”

EMPLOYMENT – Educational Services Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Students will not have the opportunity to compete with other schools for academics, or sports”

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries’ proposed service cuts?

Survey Responses - <10 Respondents

Rate the significance of proposed service cuts to REDUCTED POPULATION

5 Very Significant

Describe the Nature of the Impact on REDUCED POPULATION

"If the ability to do full day trips to Vancouver for business purposes or for access to medical specialists is taken away then it will make it difficult for companies and residents to continue to operate or live the in the region. It will lead to businesses and residents relocating to maintain access to markets and services."

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES

5 Very Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

"As per above...if businesses and residents relocate to maintain access to markets and services, then demand for property will be low and values will fall."

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

5 Very Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"Again out migration from the community will mean a drastic reduction in employment and economic opportunities."

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

"LISTEN to the residents and travellers to & from Powell River!!! They live it, they know what will work and what won't - you will SERIOUSLY jeopardize their lifestyle & community with this harsh service cut!!!"

ROUTE 11 - SKIDEGATE TO PRINCE RUPERT

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

BC Ferries' Skidegate - Prince Rupert sailing is imperative to Haida Gwaii residents. Haida Gwaii lacks many amenities that are available in larger city centres, such as a regional hospital, post-secondary institutions, etc. By reducing the number of sailings between Prince Rupert and Haida Gwaii, BC Ferries is greatly hindering the

Survey Responses - <10 Respondents

daily functions of many island residents, as well as reducing the overall quality of life for many.

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

EMPLOYMENT – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

REVENUES – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

EMPLOYMENT – Mining, Quarrying:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

REVENUES – Mining, Quarrying
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

EMPLOYMENT – Utilities
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

REVENUES – Utilities
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

EMPLOYMENT – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

REVENUES – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

EMPLOYMENT – Manufacturing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

REVENUES – Manufacturing
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered.”

EMPLOYMENT – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered. Increased cost of goods sold on Haida Gwaii.”

REVENUES – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered. Increased cost of goods sold on Haida Gwaii.”

EMPLOYMENT – Transportation & Warehousing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered. Increased cost of goods sold on Haida Gwaii.”

REVENUES – Transportation & Warehousing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Without a direct and frequent transportation link between mainland and Haida Gwaii, the opportunity to transport these goods is greatly hindered. Increased cost of goods sold on Haida Gwaii.”

Survey Responses - <10 Respondents

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate the significance of proposed service cuts to REDUCTED POPULATION

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED POPULATION

"Who wants to live on an island that is becoming increasingly difficult to access?"

ROUTE 20 – CHEMAINUS TO THETIS TO PENELAKUT

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

"Penelakut Island is a First Nations Reserve. Those who live there must use the ferry for the necessities of life including food and medical care. Those with jobs off the island also depend on the ferries for work. The ferry is not a luxury, it is an essential service. Just because some sailings are poorly used does not make them less essential. A 7 am ferry may be poorly used, but if the next ferry is too late to get to work on time, then cancelling it puts someone out of work. You must also consider that the residents of a reserve do not have an option to just move somewhere else unless they are willing to give up their community. Thetis Island also has people who work off the island. Overall I think that the changes in the routes sacrifices the small communities in the name of balancing the budget. No matter how important it is to balance the budget, it is worth killing our isolated communities? People will loose their homes if they have to move because they will not be able to sell them."

"We try to participate in sports and activities that are in the Cowichan Valley and also Nanaimo. If we get the late ferry runs reduced our children and adults are going to have to not get involved with leagues and sports activities that require them to be in town late or to get to town early. I think we are trying to have healthier and more active families and this goes against these efforts."

"keeping in mind both communities use the ferry as a highway to medical attention, education, food, and social. If a cut in routes will cut the fare. I'm all game."

"Any reductions, cancellations and or changes need to take into account the impact(s) on the following groups and individuals: High School Students Post H.S. Students People that commute from Vancouver Island to Thetis Island for their

Survey Responses - <10 Respondents

employment, training, etc. What long term socio-economic impact might significant changes, loss of sailings mean to our sustainability and economic future? What impact will changes, cancellations mean for property values, our future tax base? What changes will negatively impact younger families moving to the Gulf Islands? How will changes encourage, or discourage future, new residents from moving to the Gulf Islands? The bigger issue is really the FUTURE of our Marine Transportation System, which the government refuses to acknowledge is crucial to Gulf Islands existence and sustainability. The Marine System is our Highway! We can change, fiddle with and cancel sailings to justify costs, something the government would never do to rural mainland communities and their land based highways. Until there is a TOTALLY new model in place and a way of addressing the future of our BC Ferry system, these issues, and "game changers" will continue on for ever this, or until there are fewer and fewer Gulf Islands communities left. WE speak as residents who are parents of a 17 year old who is a student, member of the TIVFD and we are all active in our community."

"Without some timing adjustments the hole left on the evening cancellation will back for a bottleneck of traffic before 5:00 and after 7:30. Cancelling the late sailings will limit our options to attending theatre and other cultural activities. It will also limit students' ability to participate in sports and cultural activities. It makes connections from the big ferries to home harder so we are less likely to travel on them."

"The late Friday night sailings will have little impact. The 6:20 dedicated run to Thetis and back will affect working commuters. A specific example is we have a couple of volunteer firefighters that use that ferry on Wednesday to get to their weekly practice. The other ferries are too late or too early. If you can't practice you can't be a firefighter."

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

EMPLOYMENT – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Many employees already have a hard time making it to work with the schedule as is...if it is cut down even more how can anyone be employed."

"fares..."

Survey Responses - <10 Respondents

"Lack of support for a communities transportation system will have an obvious negative impact. There will be no incentive for people to try and make a living in any sector that requires access to Vancouver Island"

REVENUES – Agriculture, Forestry, Fishing:

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

"See above. It does not matter one wit what the economic sector, or field of employment is; be it, agriculture, fishing, logging, retail, trades, B&Bs, tourism. If you cut off access you cut off ability to travel to an from needed locales. Once availability to the outside is hindered greatly, you have created an obstacle to that community's growth and sustainability, as well as adding economic/financial burdens."

"Log hauling off the island will be affected. Having poultry processed will be impacted...less sailings, less flexibility and higher costs due to higher fares..."

EMPLOYMENT – Mining, Quarrying:

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

REVENUES – Mining, Quarrying

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares...."

EMPLOYMENT – Utilities

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"The BC Hydro repair trucks already don't come over early enough when there are power outages and will be even more limits on time for them to come to our islands for repair and maintenance."

Survey Responses - <10 Respondents

“fares....”

REVENUES – Utilities
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares..”

“Increased costs, discouraging development. Parts of Thetis Island can not even get TELUS to install Hi_Speed Internet service!!!”

EMPLOYMENT – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“We have construction workers who have to be over to town on the earliest ferry they can get. Getting to work otherwise is almost impossible. The wharf in Chemainus is rented out to the maximum and there is a waiting list to have a space. There would be no way for workers to get to work.”

“fares...”

“Discouraging for builders, contractors. Poor transportation schedules = lack of increased population=fewer and fewer people moving here=fewer homes=fewer needs for trades=no jobs. It is ALL interconnected. If companies, people are discouraged from coming here, you eventually have NO HERE!”

“Limits the ability of contractors to get on and off the island in a timely fashion. Makes the cost of having off island workers higher.”

“Harder to get men and materials to and from the island.”

REVENUES – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“This is tied into above statement. Pretty obvious domino affect!”

Survey Responses - <10 Respondents

"Less work at more cost."

"Less activity less revenues..."

EMPLOYMENT – Manufacturing
No Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

"Negative impact on Cotatge Industries here as well as B&Bs and our Marina's their resturants that = less of a need for related and indirectly related materials, services and skilled and unskilled workers"

REVENUES – Manufacturing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

EMPLOYMENT – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

"See above this ties into businesses already established on the Island here"

REVENUES – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"fares..."

"See above..... Some of the questions are redundant as stated before, all these impacts or lack of are inter-related as specific to EACH Island. You may forget that each Gulf Island has it's own "culture" and social-economic environment. The sense

Survey Responses - <10 Respondents

some have that ALL the Gulf islands are pretty much the same is in fact no-sense, it is nonsense. Each Island will be affected differently and to degrees by internal and external issues and challenges”

EMPLOYMENT – Transportation & Warehousing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Goods-essential services-transportation to and from”

REVENUES – Transportation & Warehousing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

EMPLOYMENT – Cultural Industries
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Ability to have access to a variety of cultural events on Vancouver island, Victoria and mainland. Ability of young people to be exposed to the arts, culture, etc. As well as Fine Arts School Programs and events”

REVENUES – Cultural Industries
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

EMPLOYMENT – Finance & Insurance
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Loss of population=loss of essential service=loss of emergency services such as Fire Rescue= Home Insurance skyrocketing=Effect on income=less income=less spending ability=local businesses being effected=DOMINO EFFECT=DOMINO EFFECT”

REVENUES – Finance & Insurance
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“See above...This is too similar to above question and this section could have should have been done differently and more efficiently”

EMPLOYMENT – Real Estate
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“who is going to want to live on an island that has to be connected by BC Ferries...too expensive and limited ferry runs? House and land will lose value.”

“fares...”

“Already stated...See prior responses. If you have questionable transportation, no matter where you are living wouldn't your real estate be affected? Pretty obvious....You would lose some of your life's investment as most of us are that are living on a Gulf Island full time”

“Real estate has slowed down a great deal since 2008 and the rising ferry fares and now reduced schedules are making these islands less desirable, so less business for realtors”

“Reduced property values and reduced activity.”

REVENUES – Real Estate
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Reduction in property values on the islands”

“house and land values will go down.”

“fares...”

“Very few sales means very little revenue.”

EMPLOYMENT – Professional, Scientific & Technical
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Limited access to necessary services VIA ferry to to access these services”

REVENUES – Professional, Scientific & Technical
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Medical appointments, tests, hospital appointments will be affected”

EMPLOYMENT – Educational Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Students have limited funds to survive and live very modestly sometimes not eating with costs as is, increased BC Ferries costs and rising Hydro costs and limited access to transportation to get to school or training will definitely affect how our children attend school. We won't be able to put our kids into extracurricular activities because they can't miss the last ferry. Also costs for parents to travel to various sports and extracurricular activities is non-existent as is. We have to limit our time to catch the ferry to town for groceries and doctor's or dentists all trying to have in one day so we can afford to go to town.”

Survey Responses - <10 Respondents

“fares...”

“Pretty obvious. already stated. The impact would be on kids needing to attend classes at VIU, High School, etc.”

“The more limiting the ferry schedule - therefore access to Vancouver Island and all the services we need from it - the less likely we are to have: a good teacher to teach at our school, a good teachers aid, families with children to go to the school.”

REVENUES – Educational Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Island residents will be less able to access educational opportunities at Vancouver Island University”

“fares...”

“Loss of jobs on island”

EMPLOYMENT – Health Care & Social Assistance
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Health care will definitely be affected. - elders/seniors need medication and doctors and costs are too high..many opt to avoid travel all together. -Social Assistance clients get \$200 per month...if it costs \$120 to get a ferry card to lower costs a little they have \$80 to buy groceries and to live on for the month. Not possible. -Getting employment is crazy too so you can get off of Social Assistance...can't afford because most jobs are minimum wage which cover the ferry costs and fuel to get to work not even groceries and rent and hydro. A single mother goes into debt trying to get to work to raise her children.”

“fares...”

“appointments”

REVENUES – Health Care & Social Assistance
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

“fares...”

EMPLOYMENT – Arts, Entertainment & Recreation
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“A family would not be able to attend and enjoy any entertainment or recreation unless if they can afford to get hotels every time. No ferry to get home and not enough money to travel with higher costs and no later ferries. At times it must slow down but spring, summer and early fall are busy times for active people and what will happen with that for our communities?”

“fares...”

“Limited access to events off Island and on V.I. This question is also redundant as it has been answered before”

“We won't be able to go to evening cultural events since the ferry will leave well before 10:00.”

REVENUES – Arts, Entertainment & Recreation
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“The local cultural venues will miss our dollars... Chemainus Theatre Festival for example”

EMPLOYMENT – Accommodation & Food Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Already answered. A non user friendly schedule will impact B&Bs and local businesses. It would discourage people from coming here”

“People visiting will leave earlier so less business.”

Survey Responses - <10 Respondents

“Less people coming to the island due to high fares.”

REVENUES – Accommodation & Food Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Less business.”

EMPLOYMENT – Public Administration
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

REVENUES – Public Administration
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

EMPLOYMENT – Other Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fares...”

“Delays in needed services repairs and response to needs. Causes additional challenges to those hoping to organize events”

REVENUES – Other Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

“fares...”

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate the significance of proposed service cuts to REDUCED POPULATION
5 Very Significant

Describe the Nature of the Impact on REDUCED POPULATION

“As the islands become less accessible, more people will leave the islands, property values will sink because the supply of island real estate will exceed demand. Families who move off-island will be forced to reduce their standard of living due to much higher housing costs. As the population on the islands decreases, it will no longer support the services there, and services will be lost.”

“fares...”

“This is not "Rocket Science" Reduced Population=Reduced Income Generated=Loss of Community Sustainability=Discouraging to Potential New Residents= Ghost Town! Or in our case=Ghost Island. I can see you could add the once great communities to the Marine Park System, since there will be no one here”

“Fewer people will want to live full time on our island as we need access to Vancouver Island for most all our services and these reductions will limit that access.”

Rate the significance of proposed service cuts to REDUCED POPULATION
4 Somewhat Significant

Describe the Nature of the Impact on REDUCED POPULATION

“No jobs, no tourists, no access to services, businesses will close, people will move to places with public transportation and to places where you can get a job with good pay - Alberta for example, many families are leaving already.”

“People are not buying on the gulf islands...they are spooked by all the negative publicity around BC Ferries.”

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES
5 Very Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

Survey Responses - <10 Respondents

"Property values will continue to fall as supply exceeds demand. I personally know someone who has left one of the islands due to the increase in rates over the past few years, and he cannot sell his home. He is trying to manage two mortgages by renting the island property, but it is difficult to keep renters in, and rents are low."

"fares..."

"Well would YOU move to a community that was: Hard to get to / Has little services / declining population....I mean really, would people invest in a dying community...This question is really ridiculous"

"The increasing cost of ferries and the reduced schedules now before us are already making our property values drop as very little sells these last several years."

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES
4 Somewhat Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

"Who wants to buy a house in a place where access is limited and no public transportation? Property and home values will be affected."

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES
5 Very Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"Cuts to early and late ferries impacts the ability of people to hold jobs. For example, a person who has a job in Nanaimo, but lives on Thetis, must get a very early ferry to get to work on time."

"Employed people already have limited access and reductions will pretty much cut their chances of getting to and from work because they will have to try to get onto ferries that will be not early or late enough. All jobs don't operate in the immediate locations they are from Victoria to Courtenay and that's a great distance from Chemainus."

"fares..."

Survey Responses - <10 Respondents

"Redundant, answered and expalined. Most of these questions are self evident don't you think> If there are no employment opportunities in a community will that community have sustainability?"

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"With the ferry stopping earlier the Vancouver Island workers at the marinas and resort will not be able to get home so will not take the jobs. And those commuting from Thetis are more challenged to get home in the evenings."

Rate the significance of proposed service cuts to OTHER IMPACTS

5 Very Significant

Describe the Nature of the Impact on OTHER IMPACTS

"Cancelling late night ferries affects the opportunity for people to access cultural and entertainment events. The already increased fares have already made it difficult for those who live on the islands. The reduces the viability of theatres and community events."

"fares..."

"Domino Effect=Domino Effect, etc, etc"

Rate the significance of proposed service cuts to OTHER IMPACTS

4 Somewhat Significant

Describe the Nature of the Impact on OTHER IMPACTS

"access is the word.. to sports to entertainment to doctors, dentists, any health services school activities and events employment"

"It may well increase the frustration felt by both the Thetis and Penelakut communities in sharing this service - especially in the summer/high season months. Over loads and sailing waits are a tense subject within both communities with each blaming the other for causing hardship for the other."

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

"The Chemainus Chamber sponsors a farmers and crafters market for 4 months a year. We provide an opportunity for artisans of the Penelakut First Nation to sell

Survey Responses - <10 Respondents

their carvings, knitting, etc. It is already difficult for them to be in the market because the ferry fares make it less economical than for others, but cutting the first ferry in the morning will mean that while they can make it on time for the market opening, they will have almost no time to set up.”

“Our community members are substantially poor and with reductions for social assistance and increased costs for hydro, ferry, fuel, and groceries there is possibility of very poor families needing Canada's aid right here at home rather than sending funds to other countries with people starving. Even employed members in our community are living from pay cheque to pay cheque and ferry usage diminishing already because we cannot afford to go to town more than once a week. We cannot afford to use the ferry but in the same sense we cannot afford to lose ferry service because we already struggle and try to subsist in this world”

“fares...our highway...our way to Economic Development resources, Medical needs, food.”

“I have a question for you: Who designed this Survey? Did you get a cross section of populations from the Gulf Islands and get their input? Who actually worked on this Survey and the logistics?”

“Our seniors are not going to be a likely to take trips so will not be spending as much of their their money in the neighbouring communities of Chemainus, Ladysmith, Duncan...”

“This government engagement process has been extremely poorly done and pits islanders against the rest of the province. If I were the Minister of Transportation I would be embarrassed at the shoddy job that has been done. The government needs to increase its funding to ferries, just as it does on the mainland to fund bridges to cross arms of the Fraser River...”

ROUTE 22 – HORNBY ISLAND TO DENMAN ISLAND

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

“the Friday late night sailings are the Island's only late sailings and allow the ageing population to access medical services in Victoria. This also allows home owners and visitors to come to the Island using other BC Ferry connections which would be very difficult if we had to rely on a 6:00 or 7:00 sailing. A cutting of the late Friday sailings would significantly impact businesses which rely on weekend visitors.”

Survey Responses - <10 Respondents

"The loss of Friday evening sailings (Friday is the only evening we have sailings) will have a huge impact on businesses and families. It will make it hard to host weddings and weekend workshops which are both important sources of revenue and for visitors and part-time residents to access the island for weekend visits which contribute to the local economy."

"I am very concerned about the cuts to the Friday night service on Hornby Island..this will seriously affect island visitors coming from Vancouver and other parts of Vancouver Island..they no longer will be able to get to Hornby Island Friday night and this affects our tourism industry and art community and our local economy. Friday night is the only night we islanders can go into town for a movie or dinner and be able to return home. I don't know who made this awful decision but it really needs to be rethought, as this is a crazy idea...the only late night ferry and you deem to remove it...this is outrageous, and very damaging to an already isolated economic community"

"Cancellation of the Friday evening ferries to Hornby Island will cost me my Friday night job at the Hornby Island Resort in the "off- peak" season. > Not only will I lose my job, but 11 other employees (4 other musicians, 2 cooks helpers, one chef, two waitress, one bartender and the manager) will lose their jobs because the Resort can not afford to stay open without the sales generated from Denman residents, tourists and part time Hornby residents who will no longer be able to get to the island. I have had this job for 23 years and it is my (and the other employees) major source of income in the winter. >These cancellations will have a devastating effect on the Hornby economy. The "off-peak" (Sept through May) weekend tourists and part time residents live or work in the cities and travel to Hornby on Friday night. Considering the time lost and the excessive cost of the ferry fare to Hornby, you can bet that they will not come to the Islands. HI Resort, B&B's and many associated businesses will close and the backbone of the island economy will be shattered. This will throw numerous presently employed workers onto welfare or force them to leave the island. Additionally: This is applicable to all the Gulf Islands and coastal communities dependant on the ferries for their life line >People who are dependent on working off island will move off the Island because weekend commuting will become impractical. . >the Nanaimo ferry runs will be affected by this loss of tourist and part-time resident traffic on all the Gulf Islands > The tax base will be lowered as the unemployed roles rise >This will cause the exacerbation of the already dangerously declined population of younger working people on the islands. p.s. The cost of the glossy brochure presented at the island "consultations" would have paid for numerous ferry runs for many years. The fact that the provincial government would knowingly support the destruction of the economic base of it's coastal communities in order to save a few dollars for the BC Ferry Corp. executives is pure insanity."

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

Survey Responses - <10 Respondents

EMPLOYMENT – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Tourism and fishing go together and if people can't get here for a weekend this will seriously affect tourism and economy from fishing”

REVENUES – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Friday evening sailings provide an opportunity to make deliveries on Vancouver Island and take animals to the abattoir and get back the same day.”

EMPLOYMENT – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Because part-time residents would not be able to access homes for weekends in the off-season, there will likely be less investment in residential construction.”

“people planning retirement homes etc, will reconsider as it would too difficult to get here for a weekend from the mainland”

“It is already difficult to get construction workers to the island because of the extra time and money needed to come to the islands. Why would they bother?”

REVENUES – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

EMPLOYMENT – Manufacturing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

“Hornby has a large crafts sector. The lack of ability of part-timers and weekenders to access the island on weekends will reduce the customer base.”

“Hornby is a huge artist community and the lack of tourists able to easily get here for a week end will impact this”

REVENUES – Manufacturing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Hornby has a large crafts sector. The lack of ability of part-timers and weekenders to access the island on weekends will reduce the customer base.”

EMPLOYMENT – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“retail stores would have reduced number of people buying groceries and products. This would affect sales staff.”

“Reduced weekend visitors will impact businesses.”

“The local coop will suffer from the impact of lack of tourism, it makes a huge difference if people can get here on a friday night.”

REVENUES – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fewer people coming to the Island for weekends and thus reduced spending. Staff layoffs”

“Reduced weekend visitors will impact businesses.”

EMPLOYMENT – Cultural Industries
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

“We have a large artist community who employ artists to work and if things aren't selling for lack of tourism then employment issues will suffer”

EMPLOYMENT – Real Estate
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“fewer visitors. More difficult to come to the Island. House buyers would re-consider due to difficult access with ferry schedules making it onerous or impossible to come to Hornby unless they took a day off work”

“Total negative effect re...no late night friday ferry ..you would no longer be able to Connect with leaving vancouver and getting here on a friday night...”

EMPLOYMENT – Professional, Scientific & Technical
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“off Island consulting work would require an over night stay and result in difficult competitive pricing of services”

“Many professionals use the late Friday sailings to access clients on Vancouver Island that day.”

REVENUES – Professional, Scientific & Technical
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“as above- higher costs for services making Hornby professionals less competitive”

“Many professionals use the late Friday sailings to access clients on Vancouver Island that day”

EMPLOYMENT – Educational Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“difficult to access later scheduled classes”

Survey Responses - <10 Respondents

REVENUES – Educational Services Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“difficult for Island educators to offer adult training courses with loss of late night classes”

EMPLOYMENT – Health Care & Social Assistance Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“It is already difficult to get health care workers to the island because of the extra time and money needed to come to the islands. Why would they bother?”

EMPLOYMENT – Arts, Entertainment & Recreation Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“late night Jazz at the local pub would be cancelled. Denman Islanders including band members would not be able to come over. Islanders would not be able to go to Courtenay to see later shows”

“This is an important sector - the lack of Friday evening sailings will reduce access for potential weekend visitors”

“It is already difficult to get off-island entertainers to the island because of the extra time and money needed to come to the islands. Why would they bother?”

REVENUES – Arts, Entertainment & Recreation Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“as above for later night jazz.”

“This is an important sector - the lack of Friday evening sailings will reduce access for potential weekend visitors”

Survey Responses - <10 Respondents

EMPLOYMENT – Accommodation & Food Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“loss of later sailings means a lot fewer people coming for the weekend. People rely on income from visitors for B&B, food, pottery, etc. We don't make a lot of money and cutting late sailings will have a major impact.”

“This is an important sector - the lack of Friday evening sailings will reduce access for potential weekend visitors. Some entrepreneurs are developing business opportunities by hosting off-season weddings.”

“Bad ferry service, high cost of fare= reduction of tourists=loss of business= loss of employment”

REVENUES – Accommodation & Food Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“as above. Cuts will dramatically reduce income for B&B and retail outlets”

“This is an important sector - the lack of Friday evening sailings will reduce access for potential weekend visitors. Some entrepreneurs are developing business opportunities by hosting off-season weddings.”

“Bad ferry service, high cost of fare= reduction of tourists=loss of business= loss of revenue”

EMPLOYMENT – Other Services

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Cutting late ferries makes it very difficult to leave work in time to make it to Hornby on Friday for the weekend. People won't come for B&B stays or for the local dive facility. No people means no work for staff.”

“Reduced visits by property owners will likely reduce utilization of local services”

REVENUES – Other Services

Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"incomes are small on Hornby and without weekend visitors these incomes will be devastated."

"Reduced visits by property owners will likely reduce utilization of local services"

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries' proposed service cuts?

Rate the significance of proposed service cuts to REDUCTED POPULATION

5 Very Significant

Describe the Nature of the Impact on REDUCED POPULATION

"the cuts would make it very difficult to come to Hornby for recreation and visiting summer homes. 60% of houses on Hornby are owned by off-Island people. Making it more difficult to come to Hornby will make it more unattractive to people who would have considered coming to Hornby and working remotely using high speed connections"

"Loss of the population who work off island= loss of young(er) people=retirement community with no one to work for them= loss of older people who need help >Loss of tourist based businesses= loss of employment= loss of population who need tourists to make a living= loss of tax base"

Rate the significance of proposed service cuts to REDUCTED POPULATION

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED POPULATION

"The lack of opportunity that Friday evening sailings provides to access services on Vancouver Island and to connect families will likely lead to some people moving away and others choosing to not move here."

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES

5 Very Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

Survey Responses - <10 Respondents

"The cuts would have a disastrous effect on property values. Less tax income! Who would want to buy here if it was so difficult to come for a weekend?"

"It will make Hornby a less attractive place to live, particularly for part-time residents."

"Loss of the population who work off island= loss of young(er) people who can afford to buy property=retirement community with no one to work for them= loss of older people who need help >Loss of tourist based businesses= loss of employment= loss of population who need tourists to make a living= loss of property value"

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

5 Very Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"as above regarding less attractive for people working remotely. It just makes it that much more difficult to access amenities that don't exist on Hornby."

"Loss of employment opportunities= loss of young(er) people who can afford to buy property=retirement community with no one to work for them= loss of older people who need help"

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

4 Somewhat Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

"Will reduce number of people coming for weekends to experience workshops, weddings, using accommodation, buying local goods and service."

Rate the significance of proposed service cuts to OTHER IMPACTS

5 Very Significant

Describe the Nature of the Impact on OTHER IMPACTS

"this really cuts Hornby off from the outside. We have always had our last ferry at 6:00 except for Friday night. Now this. How would other communities feel about closing their highway at 6:00 every night?"

Survey Responses - <10 Respondents

"It will make it harder for people to access off-island medical services and recreational/cultural activities not available locally."

"Loss of all the above=loss of a balanced community= degradation of the fabric of society= destroy our island"

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

"With less people coming to our island and less people living on our island, the ferry corp will loose even more money than they are loosing now. The prohibitive price of the ferry fares based on the present non viable policies will have to be raised and raised. For each raise they will loose more riders. It's a never ending scenario of self destruction."

ROUTE 26 - SKIDEGATE TO ALLIFORD BAY

Referring to the above proposed service reductions for this route, what do you feel will be the overall effect of these sailings cuts on the terminal communities?

"These cuts will utterly devastate our community. We will be FORCED to move. My partner spent over \$5,000 commuting via the ferry in 2013, and I spent almost \$2,000. In the past couple of months we have been forced to look at selling our house, moving, and transferring our children out of their school. We are not the only ones who will be forced to move. Our income helps support the local store, our kids go to the school, and our mail comes to the post office. We eat out at local restaurants, and hire locals to work on our vehicles and house. This income would be lost to the community, AND to BC Ferries. These cuts are unbelievably short sighted."

"Quite simply these cuts will cripple the economy of the community of Sandspit by: 1) Significantly reducing opportunity for tourists to visit the community. 2) Negatively impacting visitor experience as visitors will not be able to take in all the island/community can offer. 3) Significantly decrease revenue for restaurants and bars as the last ferry will be before dinner time. 4) Make it impossible for tour operators to provide day tours to Gwaii Haanas for visitors staying in queen charlotte. 5) Provide a barrier for residents and tourists to come to Sandspit as there will no longer be a connection between route 26 & 11 on Thursday nights and residents using that ferry will have to rent a hotel room for a night prior to coming to Sandspit. 6) Will impact the 2nd biggest employer in Sandspit (the Airport) as the ferry schedule will not be consistent with early morning flights. BCF's revised schedule fixes this a bit but causes barriers for the afternoon flight. 7) People will

Survey Responses - <10 Respondents

not be able to commute to and from work. The window does not allow for about 50% of commuters on that route to commute to work. The day is too short for this and does not work for the logging sector or our largest year round business (Bridgeview marine), which are the drivers of our local economy. 8) Sandspit students who commute to school may have to spend an extra 1.5 hrs (leave the house at 0700 and return to their house at 1730) with bc ferries revised schedule (published Feb 12, 2014)... they will also be unable to evening sports practices or extra curricular activity... unless it happens directly after school (which it often does not). 9) In the evenings the communities of Sandspit, Skidegate, and Queen Charlotte have acted as one community when it came to evening social and cultural events... and community meetings. This was the case for 30 years and now that is being taken away.... it is cutting a community in half. I have lived in Sandspit my entire life and the community has been hit hard by the collapse of the coastal forest sector. We had finally stabilized and started to diversify our economy. This ferry was our lifeline and the BC Govt's choice to sever that life line will be a blow that the community will not recover from in my life. It will never be the same... businesses will shut their doors and families will move because of this decision, it will impact our very way of life that we have built over decades."

"I believe the impact of these cuts will be crippling to the community of Sandspit. They will not allow people to reasonably commute to work in the forestry industry as well as many other industries. The cuts will also have a crippling effect on tourism. Visitors to the islands will not be able to take day tours to the Gwaii Haanas area from accommodations on Graham Island. There will also be issues with access to medical care as well as issues with the after hours movement of BC Hydro equipment to fix downed power lines."

"Not having PM ferry service back to Sandspit will impact the land portion of our trips. We travel from Sandspit to Skidegate to tour the Haida Heritage Centre and visit Roberta Olson's home for dinner. This leads to us having to rewrite the logistics of our itinerary on up to 4 departures. This will impact our local suppliers by reducing our visitor numbers by up to 56 guests to Skidegate."

Referring to the proposed service reductions of this route (or all proposed reduced routes), what do you feel will be the economic impact of the following sectors?

EMPLOYMENT – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Employees will no longer be able to commute to work for a full day. People will not want to risk coming to work in case something happens and they miss the last ferry and can't get home."

Survey Responses - <10 Respondents

"Forest sector employees will not be able to get to and from work. The day is just too short after the morning and evening sailings are cut. Sometimes loggers have to drive for 1hr or more after they get off the ferry on Moresby Island... this means that if they are coming from Graham Island (the Skidegate side) on the 0830 ferry they will not start work until 10am and will have to end work and start their commute at 1630 (6 hrs with a 30 min lunch break). Tell this to truckers who brake even in the first 6 hrs after their expenses and usually work another 6 just so that they can come out ahead."

"Commuting to work in the forestry industry will be limited because of the short day proposed."

"For anyone in the logging industry who lives on Moresby - this could pose a problem for commuting purposes."

REVENUES – Agriculture, Forestry, Fishing:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Any businesses that DO try to keep running in Sandspit, will have to pay extra for workers to come and stay over in Sandspit. Most likely people will just not come."

"My brother runs the largest logging contract business on Moresby Island. 1/3 of the truck drivers that contract for him depend on the ferry... if they can't make profit working on Moresby island because they can only put in 6 hour days hauling logs they won't work for him. So his production will decrease by 1/3. If his production is decreased by 1/3 his profit is decreased by at least that amount. And that is just the impact for the truck drivers."

"It will be harder for companies to find qualified employees."

EMPLOYMENT – Mining, Quarrying:
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Workers in quarrying and road building that depend on the ferry will be unable to put in a full day of work."

REVENUES – Mining, Quarrying
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“The skills shortage is already impacting this sector. If employees cant put in a full day it will impact productivity and drive down profit.”

EMPLOYMENT – Utilities
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Obviously, with the population getting smaller, fewer utilities will be required.”

“The Power Generation plants are on Moresby Island while the main population is on Graham Island. The linemen are based on Moresby Island and depend on the ferry when the power goes out. The proposed schedule will see more than 1/2 of the day without service. After hours call outs in the case of a (very regular) power outage will cost BC Hydro \$4000 if the ferry is able to sail... moving to a 12 hour shift from two 8 hour shifts means that workers may not be able to do after hour callouts for BC Hydro (or BC Ambulance).”

“Because of the short day utility companies may not be able to hire people living in Sandspit to service the rest of the islands.”

REVENUES – Utilities
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Smaller population = smaller revenues.”

“Increased time when power is out and increased cost for after our call outs \$4000 per sailing.”

“Utility companies may need to buy more equipment and hire more workers.”

EMPLOYMENT – Construction
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Smaller population = less work being done.”

Survey Responses - <10 Respondents

"A \$50 million construction project is happening in Queen Charlotte. Because of the short working day associated with the new schedule workers from Sandspit will be unable to work on that project. You don't work 6-7 hour days in the construction industry."

"Construction companies in Sandspit will have a hard time working on the rest of the islands. They will also not be able to hire commuters from other communities."

"I imagine that commuting could be an issue."

REVENUES – Construction

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"People will lose jobs because nobody will live in the community to be able to afford work."

"Contractors in Sandspit who do jobs in on Moresby Island will no longer be able to do those jobs as they will not be able to compete with such short working days."

"Because Sandspit is small there is not enough jobs in Sandspit to keep the companies going, so with the shorter ferry day they may have to shut down."

EMPLOYMENT – Manufacturing

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Bridgeview Marine repair and manufacture boats in Sandspit. Half of the workforce is from Graham Island. Those workers will no longer be able to put in a full day as the ferry schedule will not allow it."

"Workers may not be able to commute for a full day of work."

"commuting, distribution, delays expected due to limited service."

REVENUES – Manufacturing

Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

Survey Responses - <10 Respondents

"If the workforce cannot get to work businesses will loose money. Bridgeview marine is the largest company in Sandspit and the owner has indicated that he will move his operation if this schedule goes ahead."

"If employees can't put in a full day of work companies will have a hard time making products on time."

"Due to delays."

EMPLOYMENT – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Workers will not be able to commute for a full day of work."

"delays in distribution"

REVENUES – Wholesale and Retail Trade
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"People visiting Moresby Island for the day will have less time to visit retail shops in Sandspit."

"Due to delays"

EMPLOYMENT – Transportation & Warehousing
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"Bridgeview marine warehouses boats in Sandspit... they have indicated that they cannot operate with this new schedule. This means that almost all of the warehouse space in the community will sit empty all year."

"Commuting"

REVENUES – Transportation & Warehousing
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“As the connectivity between route 11 and route 26 is no longer in place on Thursday nights trucking companies can no longer deliver direct to Sandspit that night.”

“Without late ferries marine transportation companies operating in the south Moresby area will not be able to meet up with ferries. This will limit the people who can afford this type of transportation. Also during busy times there will not be enough accommodation in Sandspit for these people.”

“Limited to day travel”

EMPLOYMENT – Cultural Industries
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“No Sandspit residents will be able to attend evening cultural events on Graham Island and visa versa as the evening sailings are being cut.”

REVENUES – Cultural Industries
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“No Sandspit residents will be able to attend evening cultural events on Graham Island and visa versa as the evening sailings are being cut.”

REVENUES – Real Estate
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Almost a 100% loss of revenue for warehouse facilities as this new schedule will drive a local business out of the community that stores and maintains boats for the sport fishing sector.”

“Property values in Sandspit will fall dramatically.”

EMPLOYMENT – Professional, Scientific & Technical
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"I'm a professional, and I will be moving!"

REVENUES – Professional, Scientific & Technical
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"MY income will be removed from Sandspit."

EMPLOYMENT – Educational Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"The school population WILL decline (my kids will be taken out - and we are not the only family) - therefore employment will decline."

"Teachers from Graham Island will not be able to work on Moresby Island."

"The school principle in Sandspit commutes from Graham Island and will not be able to get to Sandspit in time."

"Limited commute time"

REVENUES – Educational Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

"The teachers who currently live in this community will be cut back even further."

"This will lead to further declining enrollment as students leave the district due to job loss. This will be exacerbated with students being sent to mainland schools due to their inability to participate in evening sports and post curricular activities. Declining enrollment will lead to declining revenue for schools and exacerbate a viscous cycle."

"Due to limited commute time"

Survey Responses - <10 Respondents

EMPLOYMENT – Health Care & Social Assistance
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Social workers living in Sandspit will not be able to service the rest of the islands and make it home at night.”

“How to commute for shift work?”

REVENUES – Health Care & Social Assistance
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“These cuts will tax Northern Health's Transportation Assistance Program as the schedule will require Haida Gwaii residents to stay longer periods for medical treatment in Prince Rupert.”

“Because these people can't afford hotels every night they will either have to move or shut down their practice.”

“limited commute times”

EMPLOYMENT – Arts, Entertainment & Recreation
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“the community of Sandspit will be even further cut off from the rest of Haida Gwaii - these things will be practically impossible with the proposed cuts!”

“Evening ferries are being cut.”

“Tour companies in Sandspit will have to down size because the proposed schedule does not leave enough time in the day to do day tours into the Gwaii Haanas area. This will cause jobs to be lost.”

“Limited commute”

REVENUES – Arts, Entertainment & Recreation
Negative Impact Expected

Survey Responses - <10 Respondents

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“There will be none!”

“Evening ferries are being cut.”

“For the same reason as the impact to employment tour companies in Sandspit will loose revenue. Moresby Explorers will loose over \$100,000 alone.”

“due to limited commute”

EMPLOYMENT – Accommodation & Food Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“UNBELIEVABLE impact on this sector - ferries has already outpriced themselves so that we no longer get much in the way of camper traffic. All of the above will suffer tremendously - not only due to the loss of my families' income, but tourist traffic will drop significantly.”

“Evening ferries are being cut. That means no business from members of communities that have been cut off by these cuts.”

“limited access to properties due to service limitations”

REVENUES – Accommodation & Food Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Not only will the tourist traffic drop significantly, but the number of locals will also drop - devastating local businesses.”

“Evening ferries are being cut. That means no business from members of communities that have been cut off by these cuts.”

“Because of the lack of late ferries to Sandspit, people may decide not to visit or stay there. People who are visiting Sandspit will not be able to have dinner in Sandspit before catching the ferry back to Graham island.”

“Directly affecting local business”

Survey Responses - <10 Respondents

EMPLOYMENT – Public Administration
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Sandspit people may not be able to commute to public administration jobs on Graham Island”

REVENUES – Public Administration
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“Increased cost of travel for those going to meetings who have to spend a night in a hotel instead of returning on an evening ferry.”

EMPLOYMENT – Other Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“People will not be able to commute to work in Sandspit.”

“Commute”

REVENUES – Other Services
Negative Impact Expected

If respondent indicated that they expected a negative impact, there were asked to describe the expected impacts:

“If companies do not have employees they cannot provide the services they offer and will lose revenue.”

“Commute”

It has been reported that the proposed reduced ferry sailings may have a negative impact on some aspects of life in coastal communities. To what degree do you feel the following socio-economic issues will be exacerbated by BC Ferries’ proposed service cuts?

Rate the significance of proposed service cuts to REDUCED POPULATION

Survey Responses - <10 Respondents

5 Very Significant

Describe the Nature of the Impact on REDUCED POPULATION

“WE WILL HAVE TO MOVE!”

“If people can't get to work they will have to move. If they move restaurants & support businesses will lay people off and more people will leave. As taxes go up for the remaining businesses to maintain the fixed infrastructure they will lay people off and they will have to leave. When tour operators cannot offer as many day trips they will lay people off and they will leave. When enough families leave and the school in Sandspit is too small to be viable it will close and then the remaining families will have to leave or send their primary aged kids to school on the ferry (leaving home at 7am and returning after 5pm.”

“Sandspit is just starting to recover from the reduction of forestry jobs and starting to rely heavily on tourism jobs. The reduction in ferry service and the associated reduction access to services may be enough to push the town to the breaking point.”

“The Aliford Bay Ferry is the main artery connecting Moresby and Graham Island. Charlotte is a lot larger than Skidegate and provides more services and businesses as a result. Sandspit will be directly affected. Tourism businesses locally will also be affected - Airport access etc.”

Rate the significance of proposed service cuts to DECLINING PROPERTY VALUES

5 Very Significant

Describe the Nature of the Impact on DECLINING PROPERTY VALUES

“Our house will decline in value significantly. It's not a market that moves quickly anyway, but with many people leaving, the market will be saturated...”

“What is property worth if people are leaving and there is no economy. BC Assessment will not change the assessments as they are based on freak sales not the 25% of the houses already for sale and not moving... when that changes to 50% there will be no value and the same rate of taxes going to the province (to pay for transportation).”

Rate the significance of proposed service cuts to REDUCED EMPLOYMENT OPPORTUNITIES

5 Very Significant

Describe the Nature of the Impact on REDUCED EMPLOYMENT OPPORTUNITIES

“People will not be able to work full days. We are being forced to move so we are able to continue working (both my partner and myself!)”

Survey Responses - <10 Respondents

"This will result in layoffs in Sandspit's three main employers: The logging sector, the Sandspit Airport, and Bridgeview Marine."

Rate the significance of proposed service cuts to OTHER IMPACTS

5 Very Significant

Describe the Nature of the Impact on OTHER IMPACTS

"A domino effect on the entire community - people leaving will reduce usage at the store, restaurants, the school, the post office - it will eventually kill the community!"

"Over 1/2 of the day BC Ambulance will have to call the ferry workers out if there is an ambulance call in Sandspit or if there is a patient at the Queen Charlotte General Hospital that needs to be flown to Vancouver from the Sandspit Airport. Due to the way that they are structuring the shifts the ferry employees may not be allowed to make these trips (due to Transport Canada minimum rest regulations). Which means that patients will not make it to the care they need and may die because of it.... This is not exaggeration."

"Because of transport Canada regulations the ferry crew will be limited in the amount of after hours call-outs it can perform. This will limit the ambulance's ability to take people to the hospital at night."

"to the tourism industry and the communities that benefit from a very short season bringing income to local communities following a very quiet winter on the north coast. Summer is when many make their money."

Please provide other comments you feel are relevant to assist in documenting the likely economic impact of the service reductions.

"Thank you for doing this survey. I wish the gov't had done it so that they could understand the impacts and the pain and anguish that they will be causing communities to save a minuscule amount of money."

**BC FERRIES ECONOMIC IMPACT ANALYSIS
NEXT STEPS OUTLINE**

Background

BC Ferries has proposed a series of sailing reductions and fare increases on its minor and northern routes scheduled for implementation in late April 2014. Through a research project commissioned by the Association of Vancouver Island and Coastal Communities, analysis was conducted documenting the opinions of coastal community residents on the likely effects of proposed service reductions. Residents felt strongly that the service reductions were likely to have a major impact across most sectors of their economies.

This research was solely opinion based and was focused on what might happen in the future. Statistical evidence documenting what has occurred in the recent past was proposed as part of the research plan, but the data was not available within the project schedule. It was intended that the combination of statistical data on recent trends in local economies combined with projections of likely futures would help coastal communities document their case regarding BC Ferries' impacts.

Questions for Analysis

1. What level of ferry service and what fare structure is required to help maintain healthy economies in the coastal communities served by BC Ferries?
2. Is it possible to develop a cause and effect relationship between:
 increased ferry fares, and
 reduced sailings
 and the state of the coastal community economies?

Possible Research Approach

Utilize a series of proxy measures and track the performance of local economies over the past decade and match these changes to:

Ferry ridership, and
Fare increase

This information should provide a measure of the relationship among ferry fare increases, ferry ridership, and a range of measures of local economies

Possible proxy measures of local economies could be:

- Population change
- Residential assessed property values

- Residential properties sold
- Building permits
- Hotel room tax receipts
- Restaurant sales
- Retail sales

This information would need to be obtained and tallied by coastal community and/or island. Tabular reporting might be as follows:

Community/Island									
BC Ferry Route									
Year (or fiscal yr.)	Ferry Ridership	Passenger Fare	Vehicle Fare	Population	Property Values	Property Sales	Building Permits	Etc.	
2000									
2001									
:									
:									
:									
2013									

This information would allow comparisons to be made between ferry ridership, ferry fares, and various aspects of the economy. It does not provide a definitive cause and effect relationship as other outside factors could be the cause of, or be contributing to, ridership decreases. It would however, provide statistical evidence regarding the nature and significance of the issues.

It is noted that some of this data may be difficult to obtain on small communities or geographic areas.

Prepared by:
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February 24/14