VICTORIA

british columbia   *full of life*

Connecting Destinations, Moving People:

A Passenger Gateway Strategy for Greater Victoria • 2013

Connecting Destinations, Moving People: A Passenger Gateway Strategy for Greater Victoria

2013

Prepared By:
Tourism Victoria Transportation Committee

In Partnership With:
BC Ferry Services Inc.
BC Transit
Black Ball Ferry Line
Clipper Navigation
CVS Cruise Victoria
Greater Victoria Harbour Authority
Greater Victoria Visitor and Convention Bureau (Tourism Victoria)
Harbour Air Seaplanes
Helijet
L.A. Limousines
Starrboard Enterprises Inc.
The Butchart Gardens
Victoria Airport Authority
Wave Point Consulting
Wilson's Tours
Wilson's Transportation

Table of Contents

1. THE VISION

Greater Victoria's transport system should provide visitors with competitive and sustainable transport options to access our region, services and leisure activities.

We believe that the visitor experience will be improved by our collective efforts and a focus on transportation service quality thereby contributing to sustainable growth for the visitor economy.

This document reflects the collective thinking of the transportation and related industries. The strategies and action items reflected herein are for the sector as whole to be used as guiding principles towards the development of infrastructure and the prioritization of initiatives that will best serve Greater Victoria in the movement of passengers to and throughout the area.

2. GUIDING PRINCIPLES

The strategy will be guided by a focus on tangible actions that can and should take place in order to improve access to Greater Victoria and throughout the region. The underlying principles to infuse change are based on cooperation on industry driven initiatives that are, where necessary, politically enabled and supported in partnership

Our transportation framework should move to include a greater focus on technology in order to enhance the customer experience, as well as potential integrated multimodal pricing of transit and consumer-based packaging of transportation options

In order to shift perceptions that traveling to Victoria is expensive, time consuming and onerous, we must transparently make actual changes to that process and then communicate those, along with existing effective offerings, to our consumers on a consistent basis from all operators

This is a living document that will be reviewed an updated in order to reflect the changing nature of the transportation sector

3. THE APPROACH

Our approach to developing a Passenger Gateway Strategy for Greater Victoria began by initiating, coordinating and receiving input from all vital parties through the Tourism Victoria Board and Transportation Committee. The strategy, once completed, would highlight universal areas of opportunity for maintenance, enhancement and development of transportation services and infrastructure that will result in the more effective movement of people to and within the Greater Victoria area.

The following four priority themes were selected because they drive economic investment and growth:
1. Focus on the priority markets and transportation services required to bring visitors to the destination
2. Establish a branded and universal "welcome" at all entry points to Victoria

3. Move people easily by proactively pursuing opportunities for service and infrastructure improvements at key gateway access points and at various zones within Greater Victoria
4. Establish united priorities for major transportation-related infrastructure investments within the region

Tourism Victoria's Transportation Committee was the conduit used to create this strategy. The Committee met regularly and followed the process described below:

1. Initial meeting to gauge interest and identify necessary parties needed at the table
2. Written brief on project distributed to members and to potential Committee members
3. Engagement of facilitator to move the Committee through the process
4. Host a Passenger Gateway Strategy development session
5. Review and synthesis of existing information
6. Review the draft report

Connecting Destinations, Moving People: Developing a Passenger Gateway Strategy for Greater Victoria thus sets the direction that will help shape our future for moving people and connecting communities within Greater Victoria and beyond. It is intended to help guide the development and delivery of economically, socially and environmentally sustainable transport options for all forms of travellers.

An innovative approach to tourism transport planning is needed to meet the challenges we face now and will face in the future. The Passenger Gateway Strategy thus addresses transport needs of visitors whether they are travelling to or through the region.

Investment from visitors is a key driver of Victoria's prosperity. The strategy will enable Greater Victoria to respond to the changing transport needs of people by improving communication across industry, government and the community and by stimulating ongoing efforts that will deliver better outcomes for everyone.

Members of the tourism community recognise that private vehicles, ferry and aviation transportation provide flexible, convenient and highly personalised options to reach locations on southern Vancouver Island. Private vehicle use enables travellers to achieve a level of access and mobility that is not otherwise possible on Vancouver Island with its significant geographic dispersion, relatively low urban densities and dynamic growth. The private vehicle is acknowledged as a vital option in achieving sustainable tourism transport in Victoria.

At the same time there are many visitors travelling through the Greater Victoria area for which the private vehicle is not the most sustainable option. Urban travel to and from the airport or marine terminals where private and public sector ground transport is a viable and attractive option for guests visiting our region is an example. These forms of transportation services can not only be used to increase the quality of the visitor experience and show environmental sensitivity but will also reduce the cost of traffic congestion caused by increasing levels of private vehicle use. The strategy deals with this central issue so that tourism transport for everyone in Victoria is sustainable into the future.

The Passenger Gateway Strategy will help influence policy direction for all other planning and infrastructure investment decisions related to improving access to our communities and moving people between key attractions, retail and recreational areas. Our approach recognizes the important role other agencies and planning authorities will play in delivering on this direction. Tourism Victoria can encourage such agencies by working collaboratively with all groups across government, industry and communities and recognizing their interests along with those in the tourism sector in achieving outcomes of mutual interest.

Partnerships will need to be further developed with those involved in developing and delivering related transportation strategies and plans to ensure our efforts and targets are aligned. By ensuring a consistent and well thought out approach to our actions we believe that the desired outcomes for moving people to our region and connecting communities throughout Victoria will be achieved.

4. THE CHALLENGES WE FACE

4.1 Current State of Tourism Sector
Visitation to Greater Victoria has an economic impact of approximately 1.8 billion dollars every year. Our industry is comprised of many stakeholders including those who operate tourism-related businesses, suppliers to those businesses, organizations that develop tourism product, deliver customer service and create the laws and regulations that govern us.

Greater Victoria, as a destination, is as effective as the sum of its parts. Tourism development is a continuous joint effort. Competition remains fierce for the visitor dollar and Greater Victoria tourism-related businesses will need to effectively communicate their value proposition and competitive advantage. Each stakeholder in our industry must continuously refine its level of positive differentiation in its product or service offering, advertising and promotion as well as level of customer service to be successful.

We are facing serious challenges with ongoing global economic uncertainties, most significantly in Europe and the United States. The debt crisis, high unemployment, fiscal austerity measures and a fragile financial sector are all contributing factors in the definition of the once "new" but now simply "normal" economy. Greater Victoria will continue to rely on domestic visitation and emerging markets for growth while working to maintain business from the U.S. and Europe.

Locally, we are challenged by the decrepit Belleville Ferry Terminal as well as a lack of actionable strategy for the preservation and development of our Inner Harbour. Other issues include declining government investment in the visitor economy, an outdated Visitor Centre facility and travel access costs and issues.

Tourism is dependent on multi-modal, connected and seamless transportation. This document highlights greater opportunity for collaborative initiatives.

4.2 Transportation to the Region
Given our location on Vancouver Island the tourism sector in Victoria is based on our unique resource combination involving the interface of land and sea. Natural amenities include: salt and

fresh water bodies, beaches, scenic beauty, rich terrestrial and marine biodiversity as well as a diversified culture, including First Nations, and historic heritage. Changing economic conditions, consumer sensitivity to travel costs and new market opportunities are significant trends impacting the health of the tourism industry in the Greater Victoria area. Yet no sector of the local tourism economy would be sustainable in the long-term without giving deep consideration of how to improve transportation access to our region and in turn finding innovative ways to meet the travel need of visitors once they arrive. To illustrate the importance of including transportation as an integrated part of a local tourism strategy a summary of the estimated passenger traffic served by Vancouver Island's tourism enabling transport services and infrastructure is provided in the table below:

Figure 3.1 Estimated Passenger Traffic: Vancouver Island Regional Summary ^						
Mode	**Q1**	**Q2**	**Q3**	**Q4**	**Total**	**Market Share**
Aviation *	533,163	603,182	654,083	528,313	2,318,741	12%
Ferries **	3,256,572	4,181,527	5,789,224	3,432,416	16,659,739	86%
Cruise ***	0	183,340	316,322	4029	503,691	2%
Custom Ports Marine ***	44	2,899	11,379	67	14,389	< 1%
Total Passenger Volume	3,789,779	4,942,828	6,693,750	3,978,579	19,496,560	100%
% of Total by Quarter Estimated	20%	25%	34%	21%	100%	

* Vancouver Island Regional & Victoria Harbour Airports
** BC Ferries, COHO, WSDOT with Vancouver Island routes
*** 2012 Victoria Cruise Ship Passengers
**** Yachts arriving at Bedwell Harbour, U.S. visitors arriving by boat
^ Data Sources for Estimated Vancouver Island Passenger Volume:
- Vancouver Island Regional Profile - Building Tourism with Insight, January 2010
- Air Carrier Traffic at Canadian Airports - 2010. Statistics Canada
- Washington State Ferries Traffic Statistics Rider Segment Reports 2010
- MV Coho Economic Impact Study, November 15, 2007
- Bedwell Harbour Custom Point of Entry data, Statistics Canada

In terms of enabling transportation services and infrastructure the importance of the respective ferry systems to the continued health of the Vancouver Island tourism economy cannot be overstated. While total passenger traffic volume is not all attributable to tourism activities the basic data nevertheless indicates that approximately 86% of Vancouver Island's passenger traffic volume relies on the ferry services to meet their travel needs. The Black Ball Ferry alone transports 400,000 passengers and 120,000 vehicles annually. BC Ferries transports 21 million passengers and 9 million vehicles annually and the Tsawwassen-Swartz Bay route is the main artery in the coastal ferry service and the direct ground link between Southern Vancouver Island

and the population centers on the Lower Mainland. Victoria Clipper alone has transported over seven million passengers in the last 25 years. Cruise tourism in our region annually provides over 400,000 North American or international visitors thus making Greater Victoria the largest cruise port-of-call in Canada.

Victoria International Airport is a vital air transport node that services 1.5 million passengers annually. The floatplane base in Victoria's Inner Harbour and the Helijet aerodrome at Ogden Point provides convenient, single-mode service from downtown Vancouver to downtown Victoria and gives visitors an important transportation option to experience the region and provides numerous short and long haul options and opportunities to reach our destination.

Given such a well-established and mature network of transportation nodes and service providers it is not surprising that as we look out to the future, a number of weaknesses and threats appear on the horizon. Identifying these issues early and addressing them in a timely manner will help ensure the competitiveness of the Greater Victoria visitor economy.

The following points summarize the result of a facilitated planning session held to develop this strategy. A full list is available in Appendix 1. These opinions are not official positions of this strategy but represent individual feedback on the transportation landscape:

- The consumer perception is that Greater Victoria is a hard and expensive place to reach either in terms of time and/or money. While long-haul and international customers may be in a better position to judge relative travel cost effectiveness of the various modes of transport, consumers closer to home in the vehicle dominated travel market have a different perception of travel costs that acts to discourage repeat visits. In addition, border delays that occur some distance from our community do impact some consumer's willingness and ability to reach our community on a timely basis
- As a region we only have limited and fragmented research on customer perception's and reason for travel. Research needs to be integrated into marketing and public communications efforts. Transportation providers could be encouraged to share customer satisfaction results that are segmented by origin of traveller and purpose of travel
- The airport runway and related infrastructure needs as well as the need for various capital improvements and how we address Harbour related issues remain challenges

4.3 Transportation through the Region
As a growing and vibrant region, Greater Victoria is blessed with an abundant mix of vibrant urban and rural communities that serve to create a truly unique destination and travel experience as visitors move throughout the area. Tourists from around the world have continually ranked Vancouver Island and Victoria as a top choice destination. Yet, the forces of change can work to undermine our traditional strengths. Perhaps nowhere is this more immediately felt than in the area of transportation through the region. Victoria with its geographic location on the south tip of Vancouver Island has a robust highway connection to the Saanich Peninsula where the road network connects to the major transport nodes of Victoria International Airport, BC Ferries and other marine terminals. Yet, traffic volumes on our east-west highway corridor and road network, as well as seasonal transport demands by visitors, often present challenges to the quality of the travel experience for both visitors and residents alike. This may serve to undermine efforts to

improve the sustainability of our Island lifestyle that often attract many of our visitors in the first place.

The following points summarize the result of a facilitated planning session held to develop this strategy. A full list is available in Appendix 1. Again, these opinions do not represent official positions of this strategy. Session participants identified the following issues:

- Consumer transportation preference and choices will continue to evolve. However, local and regional political processes serve to undermine the creation of a culture of hospitality to tourism transportation requirements, thus, pitting the needs of residents against the needs of travellers. An alternative approach would suggest that local transportation assets used by the public are also important tourism assets but better collaborative efforts are required between government entities themselves and industry are required if we are to leverage our strengths and meet future needs
- Since capital is scarce for infrastructure improvements there needs to be an improved understanding of the regions' true needs. This is not to suggest that we don't have a regional sense of the transportation priorities; rather, it suggests that solutions need to include both major issues such as highway and airport infrastructure as well as those easily overlooked items such as improved signage and the accessibility needs of those tourists who walk or bike

5. STRENGTHS & OPPORTUNITES

5.1 Moving People
While there is no denying the fact that we face very real transportation challenges, Greater Victoria is fortunate to have many knowledgeable transportation infrastructure owners, service providers and tourism industry professionals who are able to draw on their expertise, local knowledge and experiences. This collective strength can be aligned with our opportunities to address the issues that can enhance travel to the region.

Session participants identified the following strengths:

- Victoria International Airport, floatplane and Helijet service are all recognized as being exceptional
- BC Ferries, the Black Ball Ferry and Victoria Clipper all permit visitors to experience the natural beauty of the region
- Greater Victoria region is indeed the passenger and tourism gateway to Vancouver Island

Session participants identified the following opportunities:

- Victoria International Airport has identified specific non-stop markets such as LAX, DEN and YYZ as priority markets for expansion
- Technological leadership in such areas as seamless ticketing and providing one source for learning about transportation options and methods could help to reduce consumer information gather costs and help facilitate sales. If technology leadership was matched

with creativity in travel marketing and product offering in terms of packaging the customer's value proposition can be more effectively targeted

5.2 Building Relationships

Tourism professionals inherently understand the importance of building and maintaining robust and resilient long-term relationships with those in the transportation and government sector. For example, the key ferry linkages to Greater Victoria and adjacent Islands are critical for serving both core and expanded or new customers and tourism markets. For the vessel owners, increased coastal tourism traffic arising from a market development strategy would help improve asset utilization levels and return on investments. Thus, it is not surprising that the result of the facilitated planning session held to develop this strategy session participants identified the following strengths and opportunities to leverage efforts to improve transportation through the region:

- Multiple transportation options and strong ground transport (taxis and motor coaches) sector and road network within the Greater Victoria region that is supported by a variety of walking routes and trails makes our year round tourism activities highly accessible
- Opportunities to improve the connectedness and infrastructure of our key transportation hubs are important for the long-term sustainability of the tourism sector. The most pressing issues remain the Victoria International Airport runway extension, Victoria's Harbour, finding locations for motor-coach parking and a new bus terminal. Since transportation nodes are the heart of how well our systems functions the need to create timely and effective planning processes is now more important than ever

6. WHERE TO NEXT

Connecting Destinations, Moving People: Developing a Passenger Gateway Strategy for Greater Victoria includes consideration of social, environmental and economic factors. These are:
- Environmentally sustainable transport options for visitors to our region that are safe and secure
- Transport that caters to the specific needs of visitors
- Increasing recognition of the importance of transportation to Greater Victoria's tourism economy
- Improved performance and accountability for the tourism transport system

We believe that considerations of these factors will achieve better benefits and outcomes through principles and actions that will be refined and organized under the four Key Result Areas as follows:

1. Shaping the Future
2. Moving People
3. Building Relationships
4. Developing Ourselves and our Partners

6.1 Strategies Delivering Enhanced Tourism Transport Outcomes

1. **Shaping the Future**: Building on existing strengths to develop new transportation approaches to address market access, the provision of transportation services and infrastructure.

   - Change perception of tourists to not only encourage sustainable transport choices, but also embrace the full range of transport modes
     o Developing consumer awareness of available travel choices, we will stress the quality of the existing transport service providers that serve our market and encourage competition. Tourists will be informed about the transport choices available to them and the health benefits of alternative, more sustainable modes such as walking and cycling. People will be educated about the social, economic and environmental costs of their travel choices

   - Harness the benefits of new technologies
     o We will encourage technological advancements that improve the user interface with the transport system. This includes using smartcard technologies for ticketing and collecting trip information and delivering real-time transport information to the public

   - Encourage the design of an integrated transport system that is responsive to tourists needs
     o We will advocate for initiatives that improve tourism connectivity into the Greater Victoria region and between communities. We support initiatives that make integrated ticketing and travel easier. We will encourage infrastructure investments and be available to support the interchange between various modes. Tourism transportation networks will also include consideration of pathways to make cycling and walking viable transport options

   - Encourage the integration of transport planning across governments
     o Planning should be coordinated across all levels of government to manage growth and maintain Victoria's economy and liveability. We will advocate for the needs of the tourism sector in transport and land use planning to help ensure they are integrated in future developments

2. **Moving People**: transportation services, policies and regulations, safety and security.

   - Improve accessibility and mobility through provision of sustainable transport choices.
     o People's access and mobility in communities will be improved through planning and pooling of resources across government. Developing innovative transport solutions that are flexible and respond to demands will enhance accessibility. People's transport needs will be used to determine appropriate transport solutions. We will identify barriers to accessing transport options and develop ways to provide people with assistance where needed, particularly access to essential services. We will promote and support the development of innovative

approaches and aim to ensure that legislation encourages services that are responsive to both the needs of travellers and community expectations

- Encourage high quality private and public transport services
  - Private and public transport services should be efficient, affordable, reliable, accessible, comfortable and safe. The performance of these services should be monitored against established performance measures and targets that include the needs of the travelers. Organizations will be encouraged to provide customer satisfaction data, by purpose of travel so that there is an informed discussion about service level trade-offs that may impact our tourism economy. Transport providers will be encouraged to be responsive to community needs

- Promote and support active transport options
  - Active transport such as cycling and walking will be promoted and supported as viable transport choices and the health and environmental benefits of these forms of transport promoted to visitors to Greater Victoria. Relationships across the whole of government and private sector will be strengthened to improve the cycling and walking environment. Incorporating cycling and pedestrian infrastructure into urban plans to better connect communities will support this. The public and private sector will be encouraged to provide end of trip facilities and secure bicycle storage

- Increase the safety and security of the travelling public
  - Communication and information systems between all agencies responsible for transport provision will be enhanced to protect our infrastructure and the travelling public. Provisions for safe and secure transport will be incorporated into urban design, infrastructure development and series. Tourists will be informed about the relative safety of various transport options to encourage the use of sustainable modes

3. **Building Relationships:** Alliances and partnerships, public and community awareness and support.

- Enhance information sharing between government, transport providers and the community to better utilize available resources

- Provide coordinated information services to all tourists about their travel options. Supply educational material to the public about sustainable travel choices. Establish communication channels across government, transport providers and the community sector to tailor solutions to better meet local information needs

- Engage local communities in planning and implementing policies, programs and services

- Develop partnerships across and between government and the private sector

- Strengthen partnerships between all levels of government to strategically broaden the picture of transport provision. We will develop cooperative relationships to better coordinate and integrate existing infrastructure. We will enter into joint funding arrangements to implement concrete projects that prove benefits to communities. We will maximize the use and benefit of transport to local communities so that private and public resources can be shared

4. **Developing Our Partners and Ourselves**: Developing business, industry, community and our organization.

   - Improve government capability so that benefits to the community are maximized

   - Develop cross-agency relationships so that specialist knowledge, technological expertise and local information can be shared. This pooled resource will enhance government's capability to provide quality transport services to the community. We will strengthen the link between strategic planning and service delivery and develop new tools and capabilities through staff training and development to build a client-focused future-driven workforce

   - Develop industry capability
     o Improve strategic links between industry and government. Develop performance management processes that encourage industry to be more proactive in planning transport services. Build service contracts to stimulate new, flexible and demand-responsive transport services capable of meeting both contemporary and future needs. Encourage industry to invest in training and capability improvement to increase their viability and to ensure that services are able to meet future needs

   - Develop community capacity to meet their changing needs

   - Government will be encouraged to support communities to influence decisions and processes for change, broker resources and develop local solutions to fulfil unmet transport needs of visitors. Existing community capacity needs to be leveraged to better use the local knowledge, skills and resources that tourism sector participants can offer to maximize our effect, particularly in communities impacted by major transportation nodes

   - Managing our performance
     o The transportation sector, through partnership, will regularly assess and manage our performance by advocating for clear performance indicators and targets against specific actions. We will monitor transportation developments and evaluate their impact on the tourism sector

6.2 Action Items

The above principles will be used as we apply our efforts to the following short and long-term priorities:

Transportation to the Region, Short Term (within five years)
- PRIORITY: Ferry terminal redevelopment with consolidation of Clipper and COHO terminal operations to an effective and welcoming Inner Harbour gateway with the implementation of pre-clearance measures with U.S. Customs and Border patrol
- Develop and implement an Inner Harbour Plan
- Support current float plane terminal redevelopment to provide more efficient, reliable, accessible facilities
- Continued development of air services and airport infrastructure at YYJ
- Cruise terminal upgrading to world-class standards

Transportation through the Region, Short Term (within five years)
- PRIORITY: Reduce Highway One congestion with the development of the McKenzie Bypass, rail and water initiatives and Sayward and Keating Cross Roads improvements along with longer term improvements to the Malahat
- Support the development of an integrated transportation plan for CRD
- Designated, centralized bus parking
- Support innovative transportation initiatives such bicycle pick-up/drop-off
- Cruise passenger shuttle bus enhancement to more environmentally friendly technology
- Cruise passenger water shuttle service to move passengers downtown by water

Transportation to the Region, Long Term (five or more years)
- PRIORITY: YYJ air-field related infrastructure improvements and expansion

Transportation through the Region, Long Term (five or more years)
- PRIORITY: Implementation of integrated transportation plan for CRD
- Rapid transit connections
- Continue to develop air services and airport infrastructure
- Expanded cycling infrastructure linking major transportation nodes
- Foster an environment where initiatives are industry driven as opposed to politically driven
- Technology in transportation addressed with projected needs such as electrical charging stations