
British Columbia Ferry Services Inc.

Annual Report
to the
British Columbia Ferries Commissioner

Year Ended March 31, 2019



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Introduction

In accordance with Section 66 of the Coastal Ferry Act (the “Act”), British Columbia Ferry Services Inc. (“BC Ferries” or the “Company”) is pleased to submit its annual report for the year ended March 31, 2019 (the “fiscal year” or “fiscal 2019”), to the British Columbia Ferries Commissioner (the “Commissioner”).

This report is a compilation of information on the services BC Ferries has provided during the fiscal year on designated ferry routes, and includes details on the costs and quality of services provided to deliver services on those routes. It responds to the specific information requirements conveyed to BC Ferries by the Commissioner and as identified in the Act, and is structured in two parts:

Part 1: Services on Designated Routes

In fiscal 2019, BC Ferries delivered coastal ferry services on 25 designated ferry routes under the Coastal Ferry Services Contract¹ (the “Contract”) between BC Ferries and the Province of British Columbia (the “Province”), as represented by the Ministry of Transportation and Infrastructure. These ferry routes are regulated under the Act.² In accordance with the Contract, BC Ferries also manages ferry transportation services on other unregulated routes through contracts with alternative service providers.

Part 1 of this report contains financial statistics, as well as information on traffic levels, and operating and performance statistics for the fiscal year for each of the 25 designated ferry routes.

Part 2: Service Quality

Feedback and Engagement Report

Part 2 includes BC Ferries’ feedback and engagement report for fiscal 2019. This report contains a consolidated summary of the customer-initiated feedback BC Ferries received through its various reporting channels during the fiscal year for all routes, and describes the actions taken in response. It also provides an overview of the key stakeholder and community engagement initiatives undertaken in the year and the themes arising from those consultations.

Customer Satisfaction Tracking

The Company commissioned an independent professional consulting organization to conduct and document a comprehensive customer satisfaction survey. Part 2 contains a copy of the 2018 customer satisfaction tracking report.

¹ As amended for performance term four (April 1, 2016 – March 31, 2020).

² In this report, the “Major Routes” refer to the three regulated routes connecting Metro Vancouver with mid and southern Vancouver Island and one regulated route connecting Horseshoe Bay and Langdale; the “Northern Routes” refer to the three regulated routes operating on the British Columbia coast north of Port Hardy on Vancouver Island (on September 16, 2018, service commenced on the new route directly connecting Port Hardy and Bella Coola); and the “Minor Routes” refer to the 18 regulated routes primarily serving the northern and southern Gulf Islands and the northern Sunshine Coast (also known as the “Inter-Island Routes”). One of the Minor Routes is operated under contract by an alternative service provider.

Part 1

Services on Designated Routes



Part 1: Services on Designated Routes

Overview

This section contains financial statistics as well as information on traffic levels, and operating and performance statistics for fiscal 2019 for each of the designated ferry routes. The following three reports are included:

Operations Report

The Operations Report provides the following information for the designated ferry routes, presented in numeric format for each route:

➤ **Round Trips**

This report shows the total number of round trips BC Ferries delivered on each of the designated ferry routes.

On a system-wide basis, BC Ferries delivered a total of 79,959 round trips during the fiscal year, which exceeded by 3,823.5 the annual number of round trips required to be delivered under the Contract. BC Ferries met all core service levels, in terms of the delivery of the minimum required round trips under the Contract, in fiscal 2019.

➤ **Vessel Capacity**

For each designated ferry route, the vessel capacity BC Ferries provided in the fiscal year is presented along with the calculation of capacity utilization. Capacity is calculated on the basis of automobile equivalents (“AEQs”). An AEQ represents the amount of vessel capacity occupied by a particular vehicle type, expressed as the number of under height vehicles it displaces (e.g. a bus which displaces three under height vehicles – or cars – would have an AEQ of 3). In fiscal 2019, BC Ferries provided capacity sufficient to carry the previous year's traffic, with capacity utilization on the designated ferry routes ranging from 35.2% to 87.5%.³ As compared to the prior fiscal year, capacity utilization in fiscal 2019 increased by 0.5% system-wide, primarily as a result of a higher number of AEQs carried due to higher traffic levels, partially offset by an increase in capacity provided from additional round trips.

➤ **Traffic and Revenue**

This report presents vehicle traffic (AEQs) and passenger traffic carried on each of the designated ferry routes during fiscal 2019 and compares it to the traffic carried in the previous fiscal year. The associated tariff revenue generated from each route is also shown.

In fiscal 2019, BC Ferries carried 10.1 million AEQs⁴ and 22.3 million

³ Excludes capacity utilization for route 28 (Port Hardy to Bella Coola), which commenced service on September 16, 2018.

⁴ Equivalent to 8.9 million vehicles.

passengers, an increase of 1.9%⁵ and 1.2%, respectively, compared to the prior year. Revenue from vehicle and passenger traffic on the designated ferry routes in fiscal 2019 totalled \$618.2 million, a decrease of \$22.0 million from the prior fiscal year, mainly due to fare initiatives that commenced April 1, 2018.⁶

➤ **On-Time Performance**

On-time performance is defined as the percentage of sailings departing or arriving, as applicable, within 10 minutes of the scheduled time and is provided for each of the designated ferry routes.⁷ On-time performance can be impacted by delays due to weather, vessel substitution, terminal dock maintenance or closures and periods of unusually high traffic demand. Meeting customer service expectations in a safe and reliable manner is an important factor in the focus on on-time performance. In fiscal 2019, on-time performance decreased from 89.0% to 88.5% compared to the prior year. The Major Routes' on-time performance improved but was offset by a decrease on both the Northern and Minor Routes, primarily due to the impact of increased traffic demands.

Temporary Service Disruptions Report

This report describes how the services provided by BC Ferries during the fiscal year compared to the core service levels set out in the Contract, as amended for performance term four. There are four sections of this report:

1. Cancelled Round Trips by route and route grouping,
2. Cancelled and Extra Round Trips by route and route grouping,
3. Cancelled Round Trips by Days for route and route grouping, and
4. Round Trip Service Delivery and On-Time Performance.

For each designated ferry route, this report notes the cumulative and consecutive number of days for which round trips were missed and the causes of the missed round trips.⁸ As noted above, in fiscal 2019, BC Ferries exceeded by 3,823.5 the annual number of round trips required to be delivered under the Contract. Many of these additional round trips were delivered on the three Major Routes connecting Metro Vancouver with mid and southern Vancouver Island, on the route connecting Skidegate and Alliford Bay (route 26), and in the summer on the routes connecting Buckley Bay with Denman Island (route 21) and Denman Island with Hornby Island (route 22).

In the "Round Trip Service Delivery and On-Time Performance" section of the report, certain elements of reporting are graphically presented including the

⁵ Also equivalent to 1.9% when calculated on the basis of vehicles.

⁶ On April 1, 2018, and continuing through to March 31, 2020, BC Ferries applied a fare reduction of 15% on the Northern Routes, the Minor Routes and on the Major Route connecting Horseshoe Bay and Langdale. Fares were held constant on the remaining three Major Routes connecting Metro Vancouver with mid and southern Vancouver Island. Also on April 1, 2018, the BC seniors' passenger discount was increased from 50% to 100% for travel Monday through Thursday on the Major Routes and the Minor Routes. The Province contributed to the funding of these initiatives.

⁷ On-time performance on the Non-Northern routes is defined as the percentage of sailings *departing* within 10 minutes of the scheduled time; on the Northern routes it is defined as the percentage of sailings *arriving* within 10 minutes of the scheduled time.

⁸ This report describes compliance with the minimum or 'core' service levels required by the Contract. It does not include cancellations of round trips above these minimums where the core service levels were met.

scheduled and actual round trips, and on-time performance. The percentage of sailings departing or arriving, as applicable, within 10 minutes of the scheduled time is provided for each of the designated ferry routes, as well as the reasons for the delays.

This report also provides information on “overload sailings” which is defined as a sailing for which one or more vehicles waiting to travel could not be accommodated. Overall, 13.6% of the sailings on the designated ferry routes were overloaded in fiscal 2019, which is an increase from 12.4% in fiscal 2018.

Route Financial Report

This report provides financial information for the fiscal year with comparative figures for the previous fiscal year for each of the designated ferry routes.

The information is provided by individual route and is also summarized corporately and by Major, Northern and Minor routes. Revenues and expenses are assigned directly to a route where possible or allocated to routes where direct assignment is not possible. Allocation to routes is based on various factors which reflect the activity that gave rise to the revenue or expense.

Operations Report

Year Ended March 31, 2019





Operations Summary Report for the Year Ended March 31, 2019

Routes	A		B		C		D		E		F		G		H		I		J	
	Actual Round Trips	Capacity Provided (AEQ's)	AEQ's Carried Fiscal 2019	Capacity Utilization Fiscal 2019 (C / B)	Capacity Utilization Fiscal 2018	AEQ's Carried Fiscal 2018	AEQ Growth (C - F)	AEQ Tariff Revenue Fiscal 2019 Note 2	AEQ Tariff Revenue Fiscal 2018 Note 2	AEQ Tariff Revenue Growth (H - I)										
1	4,285.0	2,757,024	2,406,711	87.3%	87.0%	2,366,308	40,403	\$ 152,964,142	\$ 148,421,028	\$ 4,543,114										
2	3,087.5	1,921,900	1,360,274	70.8%	69.8%	1,374,158	(13,884)	81,829,698	80,881,508	948,190										
3	3,176.5	1,971,560	1,342,572	68.1%	68.1%	1,339,812	2,760	29,409,669	33,458,116	(4,048,447)										
30	2,750.5	1,619,264	1,023,857	63.2%	63.0%	1,010,662	13,195	73,415,478	71,599,564	1,815,914										
Major Routes	13,299.5	8,269,748	6,133,414	74.2%	73.8%	6,090,940	42,474	337,618,987	334,360,216	3,258,771										
10	89.0	23,910	16,205	67.8%	63.9%	16,832	(627)	4,182,849	5,118,610	(935,761)										
11	163.5	32,509	24,362	74.9%	70.2%	22,628	1,734	3,742,216	4,024,889	(282,673)										
28	36.0	2,847	855	30.0%			855	88,212		88,212										
Northern Routes	288.5	59,266	41,422	69.9%	67.4%	39,460	1,962	8,013,277	9,143,499	(1,130,222.0)										
4	2,873.0	528,924	360,114	68.1%	64.9%	344,311	15,803	3,773,611	4,092,284	(318,673)										
5	3,467.0	625,452	292,896	46.8%	45.2%	284,960	7,936	3,305,836	3,712,415	(406,579)										
6	4,487.0	466,648	282,601	60.6%	58.7%	272,595	10,006	3,308,592	3,698,656	(390,064)										
7	2,642.0	591,808	215,994	36.5%	37.3%	208,625	7,369	4,423,557	5,055,439	(631,882)										
8	5,419.5	964,482	571,350	59.2%	58.4%	546,658	24,692	5,894,159	6,609,504	(715,345)										
9	993.0	335,064	204,926	61.2%	57.4%	195,708	9,218	8,519,645	9,397,598	(877,953)										
12	3,195.0	121,410	106,261	87.5%	85.0%	103,742	2,519	1,171,589	1,286,431	(114,842)										
13	4,573.0	Pass. Only	Pass. Only	Pass. Only	Pass. Only	Pass. Only	Pass. Only	275	(1,277)	1,552										
17	1,422.0	392,472	191,973	48.9%	46.6%	180,123	11,850	6,737,322	7,317,781	(580,459)										
18	2,884.5	219,260	99,170	45.2%	46.5%	95,319	3,851	705,133	786,996	(81,863)										
19	4,951.5	623,952	398,079	63.8%	62.7%	387,540	10,539	3,133,599	3,563,689	(430,090)										
20	3,850.0	184,898	94,462	51.1%	47.7%	91,802	2,660	684,655	794,714	(110,059)										
21	5,772.0	519,259	296,986	57.2%	56.3%	287,386	9,600	1,976,065	2,247,274	(271,209)										
22	4,647.0	244,325	131,520	53.8%	66.0%	125,329	6,191	906,596	1,011,691	(105,095)										
23	5,806.0	685,352	428,181	62.5%	61.5%	419,040	9,141	3,164,077	3,602,533	(438,456)										
24	2,135.0	111,020	68,663	61.8%	60.9%	66,757	1,906	612,691	706,043	(93,352)										
25	3,942.0	299,204	105,403	35.2%	37.2%	98,416	6,987	993,638	1,099,326	(105,688)										
26	3,311.5	105,952	55,843	52.7%	47.2%	50,960	4,883	491,973	527,411	(35,438)										
Minor Routes	66,371.0	7,019,482	3,904,422	55.6%	54.9%	3,759,271	145,151	49,803,013	55,508,508	(5,705,495)										
Total	79,959.0	15,348,496	10,079,258	65.7%	65.2%	9,889,671	189,587	395,435,277	399,012,223	(3,576,946)										

Obligation deferred (settled)	-	-
Total vehicle fare revenue	395,435,277	399,012,223

Note 1) Revenue arises from bike traffic and freight.

Note 2) There is no obligation deferred or settled in Fiscal Year 2019 and Fiscal Year 2018.

Note 3) Indicates percentage of sailings departing within 10 minutes of scheduled departure for the Major and Minor Routes, and arriving within 10 minutes of scheduled arrival for the Northern Routes.



Operations Summary Report for the Year Ended March 31, 2019

Routes	K	L	M	N	O	P
	Passengers Fiscal 2019	Passengers Fiscal 2018	Passenger Growth (K - L)	Passenger Tariff Revenue Fiscal 2019 Note 2	Passenger Tariff Revenue Fiscal 2018 Note 2	Passenger Tariff Revenue Growth (N - O)
1	6,409,243	6,348,722	60,521	\$ 95,323,433	\$ 97,523,221	(2,199,788)
2	3,424,759	3,483,563	(58,804)	50,716,446	53,922,538	(3,206,092)
3	2,728,376	2,726,825	1,551	13,969,907	17,456,487	(3,486,580)
30	1,717,629	1,699,176	18,453	24,976,225	26,095,787	(1,119,562)
Major Routes	14,280,007	14,258,286	21,721	184,986,011	194,998,033	(10,012,022)
10	43,374	45,029	(1,655)	4,821,886	6,044,889	(1,223,003)
11	46,749	44,637	2,112	1,518,360	1,691,109	(172,749)
28	1,541		1,541	98,419		98,419
Northern Routes	91,664	89,666	1,998	6,438,665	7,735,998	(1,297,333)
4	684,090	674,471	9,619	2,780,372	3,458,826	(678,454)
5	496,842	495,755	1,087	1,925,559	2,511,226	(585,667)
6	504,342	494,119	10,223	1,756,742	2,173,153	(416,411)
7	370,298	363,363	6,935	1,909,635	2,296,316	(386,681)
8	1,299,592	1,236,556	63,036	3,748,640	4,410,665	(662,025)
9	543,799	531,612	12,187	5,679,533	6,951,579	(1,272,046)
12	211,879	201,170	10,709	918,451	1,172,486	(254,035)
13	42,745	42,496	249	153,275	203,136	(49,861)
17	399,184	381,520	17,664	4,066,421	4,836,884	(770,463)
18	165,707	165,636	71	452,564	590,027	(137,463)
19	819,261	799,525	19,736	2,072,288	2,631,110	(558,822)
20	254,141	246,795	7,346	528,809	647,837	(119,028)
21	534,601	510,527	24,074	1,252,806	1,555,432	(302,626)
22	250,886	242,542	8,344	627,478	741,215	(113,737)
23	867,406	847,115	20,291	2,052,741	2,558,251	(505,510)
24	115,034	108,767	6,267	370,930	464,081	(93,151)
25	251,056	245,296	5,760	768,645	960,192	(191,547)
26	104,189	95,011	9,178	290,466	325,412	(34,946)
Minor Routes	7,915,052	7,682,276	232,776	31,355,355	38,487,828	(7,132,473)
Total	22,286,723	22,030,228	256,495	222,780,031	241,221,859	(18,441,828)

Obligation deferred (settled)	-	-
Total passenger revenue	222,780,031	241,221,859
Total vehicle and passenger revenue	618,215,308	640,234,082

% Sailings Within 10 Min. (Note 3)		
YE Fiscal 2017	YE Fiscal 2018	YE Fiscal 2019
82.7%	85.6%	87.6%
78.7%	81.8%	81.8%
74.3%	74.7%	81.4%
88.2%	88.8%	85.3%
80.6%	82.8%	84.3%
86.1%	85.8%	85.7%
95.6%	96.6%	92.4%
		71.0%
88.4%	88.5%	85.0%
95.6%	97.0%	93.9%
85.3%	83.7%	83.0%
84.2%	84.3%	74.1%
91.8%	95.4%	96.6%
78.4%	80.0%	91.7%
86.7%	79.2%	81.3%
86.2%	86.6%	86.1%
99.8%	99.6%	99.4%
90.0%	92.9%	92.1%
95.4%	97.0%	95.6%
95.2%	88.3%	85.9%
87.2%	81.9%	71.7%
97.9%	97.8%	97.8%
95.1%	95.9%	96.2%
98.3%	98.3%	97.0%
93.6%	91.1%	90.2%
88.2%	86.4%	86.5%
95.3%	95.7%	96.4%
91.2%	90.2%	89.3%
89.5%	89.0%	88.5%

Temporary Service Disruptions Report

Year Ended March 31, 2019



CANCELLED ROUND TRIPS BY ROUTES

Performance Against CFSC Requirements - Annual Core Service Levels

Fiscal 2019 Year Ended March 31, 2019				Cancellations of Required Round Trips for Reasons Specified in Schedule A, 2(a) of the Coastal Ferry Services Contract											Cancellations of Required Round Trips for Other Reasons			Total Cancellations	% of Annual Core Round Trips Cancelled	
Routes		Terminal 1	Terminal 2	Major Incident	Weather	Emerg. Response	Medical Emerg.	Regulatory Issue	Terminal / Dock Maint.	Terminal / Dock Mech. Failure	Vessel Maint.	Vessel Mech. Failure	Fire	Labour Dispute	Allowed Cancellations	Community Event	Traffic	Other Cancellations		
	Route 01	Swartz Bay	Tsawwassen		5										5.0			0.0	5.0 11.0 2.0 9.0	0.22%
	Route 02	Horseshoe Bay	Departure Bay	1	8						2				11.0			0.0		
	Route 03	Langdale	Horseshoe Bay		2										2.0			0.0		
	Route 30	Duke Point	Tsawwassen		9										9.0			0.0		
Major Routes				1	24	0	0	0	0	0	2	0	0	0	27.0	0	0	0.0	27.0	0.22%
	Route 10	Port Hardy	Prince Rupert									1			1.0			0.0	1.0	1.20%
	Route 11	Skidegate	Prince Rupert												0.0			0.0	0.0	0.00%
	Route 28	Port Hardy	Bella Coola		0.5							0.5			1.0			0.0	1.0	3.03%
Northern Routes				0	0.5	0	0	0	0	0	0	1.5	0	0	2.0	0	0	0.0	2.0	0.73%
	Route 04	Fulford Harbour	Swartz Bay		1							5			6.0			0.0	6.0	0.21%
	Route 05 ⁽¹⁾	Swartz Bay	Four SGIs		4							53			57.0			0.0	57.0	1.65%
	Route 06	Crofton	Vesuvius Bay		2							1			3.0			0.0	3.0	0.07%
	Route 07	Earls Cove	Saltery Bay						1						1.0			0.0	1.0	0.04%
	Route 08	Horseshoe Bay	Bowen Island		9							3			12.0			0.0	12.0	0.22%
	Route 09 ⁽¹⁾	Tsawwassen	Long Harbour		2							32			34.0			0.0	34.0	4.19%
	Route 12	Mill Bay	Brentwood Bay		17	1		1							19.0			0.0	19.0	0.59%
	Route 13 ⁽²⁾	Langdale	Gambier/Keats		8										8.0			0.0	8.0	0.20%
	Route 17	Little River	Powell River		19			1				9			29.0			0.0	29.0	2.13%
	Route 18	Texada	Powell River		4										4.0			0.0	4.0	0.14%
	Route 19	Nanaimo Harbour	Gabriola Island												0.0			0.0	0.0	0.00%
	Route 20 ⁽³⁾	Chemainus	Thetis Island		1				1			1			3.0			0.0	3.0	0.08%
	Route 21	Buckley Bay	Denman West												0.0			0.0	0.0	0.00%
	Route 22	Denman East	Hornby Island		17							1			18.0			0.0	18.0	0.44%
	Route 23	Campbell River	Quadra Island		9							4.5			13.5			0.0	13.5	0.23%
	Route 24	Quadra Island	Cortes Island		13										13.0			0.0	13.0	0.61%
	Route 25	Port McNeill	Alert Bay		17										17.0			0.0	17.0	0.43%
	Route 26	Skidegate	Alliford Bay		14										14.0			0.0	14.0	0.48%
Minor Routes				0	137	1	0	2	2	0	0	109.5	0	0	251.5	0	0	0.0	251.5	0.40%
TOTAL				1.0	161.5	1.0	0.0	2.0	2.0	0.0	2.0	111.0	0.0	0.0	280.5	0.0	0.0	0.0	280.5	0.37%

% of Annual Core Round Trips Cancelled 0.00% 0.21% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.15% 0.00% 0.00% 0.37% 0.00% 0.00% 0.00% 0.37%

Notes:

⁽¹⁾ Routes 5 and 9 - the Queen of Cumberland was removed from service due to a mechanical problem from April 18, 2018 to May 17, 2018. During this period, BC Ferries was authorized by Order 18-02 of the British Columbia Ferries Commissioner to temporarily reduce service below the core service levels set out in the Coastal Ferry Services Contract for Routes 5 and 9. BC Ferries continued to provide alternative service using other vessels and adjusted schedules.

⁽²⁾ Route 13 core service levels include some round trips that are deliverable only 'on demand.'

⁽³⁾ Route 20 - the Kuper was removed from service due to weather-induced damage to the trestle and berth on Penelekut Island from December 20, 2018 to January 3, 2019. During this period, BC Ferries was authorized by Order 19-01 of the British Columbia Ferries Commissioner to temporarily reduce service below the core service levels set out in the Coastal Ferry Services Contract for Route 20. BC Ferries continued to meet core service levels by providing alternative service using a water taxi and adjusted schedules.

CANCELLED & EXTRA ROUND TRIPS BY ROUTES

Fiscal 2019 Year Ended March 31, 2019			
Routes		Terminal 1	Terminal 2
	Route 01	Swartz Bay	Tsawwassen
	Route 02	Horseshoe Bay	Departure Bay
	Route 03	Langdale	Horseshoe Bay
	Route 30	Duke Point	Tsawwassen
Major Routes ⁽²⁾			
	Route 10	Port Hardy	Prince Rupert
	Route 11	Skidegate	Prince Rupert
	Route 28	Port Hardy	Bella Coola
Northern Routes			
	Route 04	Fulford Harbour	Swartz Bay
	Route 05	Swartz Bay	Four SGIs
	Route 06	Crofton	Vesuvius Bay
	Route 07	Earls Cove	Saltery Bay
	Route 08	Horseshoe Bay	Bowen Island
	Route 09	Tsawwassen	Long Harbour
	Route 12	Mill Bay	Brentwood Bay
	Route 13	Langdale	Gambier/Keats
	Route 17	Little River	Powell River
	Route 18	Texada	Powell River
	Route 19	Nanaimo Harbour	Gabriola Island
	Route 20	Chemainus	Thetis Island
	Route 21	Buckley Bay	Denman West
	Route 22	Denman East	Hornby Island
	Route 23	Campbell River	Quadra Island
	Route 24	Quadra Island	Cortes Island
	Route 25	Port McNeill	Alert Bay
	Route 26	Skidegate	Alliford Bay
Minor Routes			
TOTAL			

Notes:

⁽¹⁾ In certain circumstances (e.g. vessel or dock breakdown, mechanical failure or maintenance) round trips may be provided by contracted service providers (e.g. water taxi, tug & barge, flights).

⁽²⁾ For Major Routes, the annual number of round trips required under the Coastal Ferry Services Contract includes minimums for each individual route as well as an aggregate total for the four routes (Route 1, 2, 3 and 30).

Performance Against Annual Core Service Levels Year Ended March 31, 2019				
Actual Round Trips ⁽¹⁾	Round Trips Required ⁽¹⁾	Variance - Net Extra / Short Round Trips	Required Round Trips Cancelled	Total Extra / Short Round Trips
4,285.0	3,512.0	773.0	5.0	778.0
3,087.5	2,723.0	364.5	11.0	375.5
3,176.5	2,945.0	231.5	2.0	233.5
2,750.5	2,379.0	371.5	9.0	380.5
13,299.5	12,254.0	1,045.5	27.0	1,072.5
89.0	83.0	6.0	1.0	7.0
163.5	159.5	4.0	0.0	4.0
36.0	33.0	3.0	1.0	4.0
288.5	275.5	13.0	2.0	15.0
2,873.0	2,879.0	-6.0	6.0	0.0
3,467.0	3,465.0	2.0	57.0	59.0
4,487.0	4,440.0	47.0	3.0	50.0
2,642.0	2,510.0	132.0	1.0	133.0
5,419.5	5,334.0	85.5	12.0	97.5
993.0	812.0	181.0	34.0	215.0
3,195.0	3,214.0	-19.0	19.0	0.0
4,573.0	4,068.0	505.0	8.0	513.0
1,422.0	1,364.0	58.0	29.0	87.0
2,884.5	2,813.0	71.5	4.0	75.5
4,951.5	4,896.0	55.5	0.0	55.5
3,850.0	3,700.0	150.0	3.0	153.0
5,772.0	5,260.0	512.0	0.0	512.0
4,647.0	4,058.0	589.0	18.0	607.0
5,806.0	5,782.0	24.0	13.5	37.5
2,135.0	2,135.0	0.0	13.0	13.0
3,942.0	3,958.0	-16.0	17.0	1.0
3,311.5	2,918.0	393.5	14.0	407.5
66,371.0	63,606.0	2,765.0	251.5	3,016.5
79,959.0	76,135.5	3,823.5	280.5	4,104.0

CANCELLED ROUND TRIPS BY ROUTES

(For Cancellations of Minimum Required Round Trips for Reasons Specified in Schedule A, Section 2(a) of the Coastal Ferry Services Contract)

Fiscal 2019 Year Ended March 31, 2019				Performance Against Estimated (Daily) Core Service Levels	
Routes				Cumulative Days When Round Trips Missed <i>Allowed 30 Days / Route</i>	Highest Consecutive Days when Round Trips Missed <i>Allowed 20 Days / Route</i>
Major Routes	Route 01	Swartz Bay	Tsawwassen	2	1
	Route 02	Horseshoe Bay	Departure Bay	6	1
	Route 03	Langdale	Horseshoe Bay	1	1
	Route 30	Duke Point	Tsawwassen	5	1
Northern Routes	Route 10	Port Hardy	Prince Rupert	2	2
	Route 11	Skidegate	Prince Rupert		
	Route 28	Port Hardy	Bella Coola	2	1
Minor Routes	Route 04	Fulford Harbour	Swartz Bay	11	2
	Route 05	Swartz Bay	Gulf Islands ¹	29	9
	Route 06	Crofton	Vesuvius Bay	2	1
	Route 07	Earls Cove	Saltery Bay	1	1
	Route 08	Horseshoe Bay	Bowen Island	4	1
	Route 09	Tsawwassen	Long Harbour	18	5
	Route 12	Mill Bay	Brentwood Bay	9	4
	Route 13	Langdale	Gambier/Keats	1	1
	Route 17	Little River	Powell River	17	5
	Route 18	Texada	Powell River	2	1
	Route 19	Nanaimo Harbour	Gabriola Island		
	Route 20	Chemainus	Thetis Island	3	1
	Route 21	Buckley Bay	Denman West		
	Route 22	Denman East	Hornby Island	4	1
	Route 23	Campbell River	Quadra Island	7	1
	Route 24	Quadra Island	Cortes Island	8	1
	Route 25	Port McNeill	Alert Bay	8	1
	Route 26	Skidegate	Alliford Bay	3	1

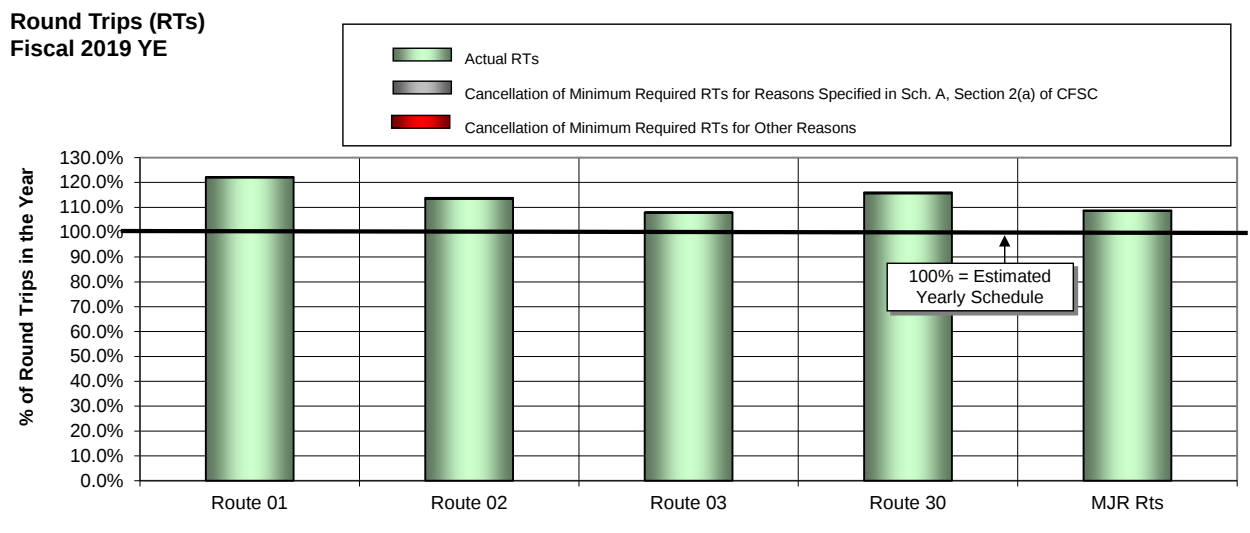
¹ Includes Pender, Saturna, Mayne and Galiano islands.

Round Trip Service Delivery and On Time Performance

Fiscal 2019

Year Ended March 31, 2019

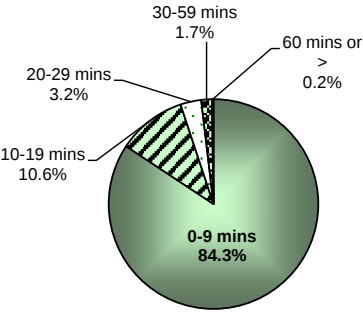
Major Routes



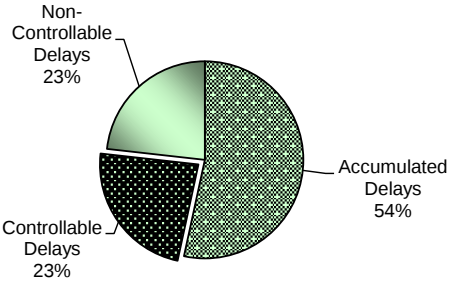
Routes	Route Description	Actual RTs	Round Trips Required ⁽¹⁾	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 01	Swartz Bay-Tsawwassen	4,285.0	12,254.0	1,045.5	49.5%
Route 02	Horseshoe Bay-Nanaimo	3,087.5			34.5%
Route 03	Langdale-Horseshoe Bay	3,176.5			28.4%
Route 30	Nanaimo-Tsawwassen	2,750.5			28.0%
MAJOR Routes Total		13,299.5	12,254.0	1,045.5	36.5%

⁽¹⁾ For Major Routes, the annual number of round trips required under the Coastal Ferry Services Contract includes minimums for each individual route as well as an aggregate total for the four routes (Route 1, 2, 3 and 30).

On Time Performance Fiscal 2019 YE

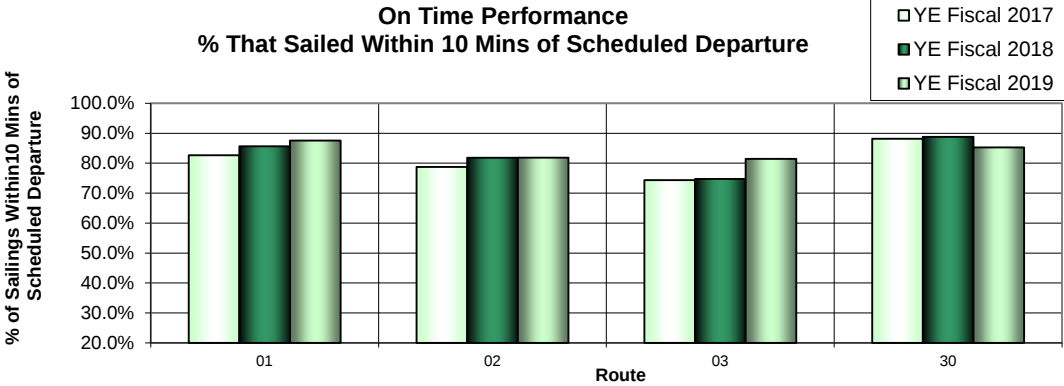


Reasons for Delays - Fiscal 2019 YE



Controllable = Under the control of the company (loading procedure, fuelling, etc.)
Non-Controllable = Out of the control of the company (bad weather, medical, etc.)
Accumulated = Delays accumulated over the course of the day as a result of an earlier delay

On Time Performance % That Sailed Within 10 Mins of Scheduled Departure

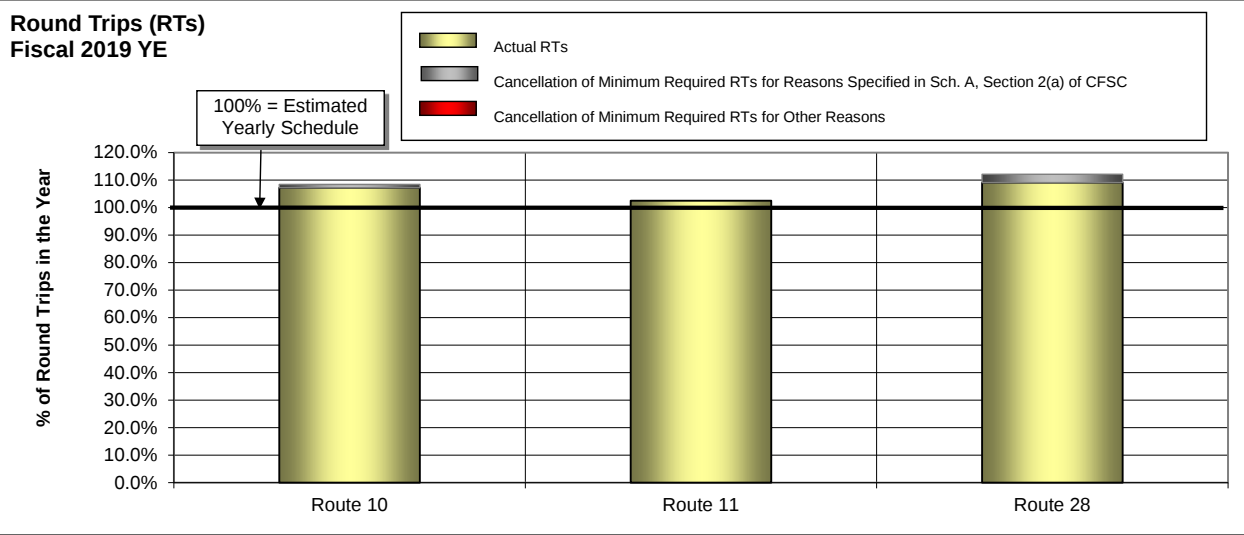


Round Trip Service Delivery and On Time Performance

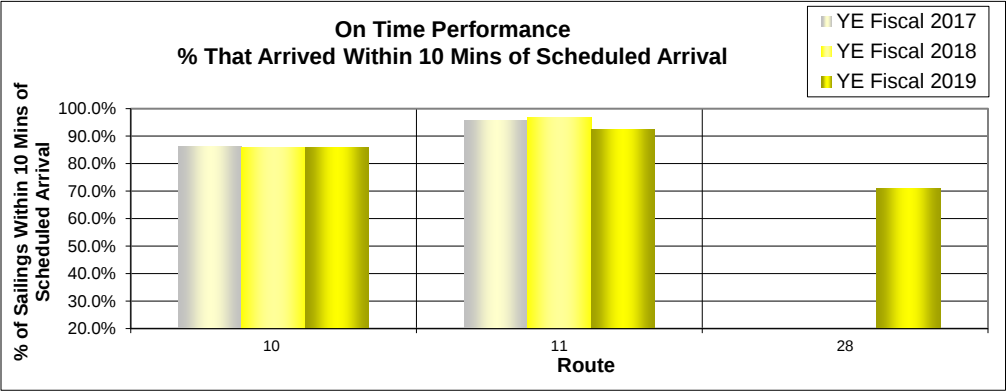
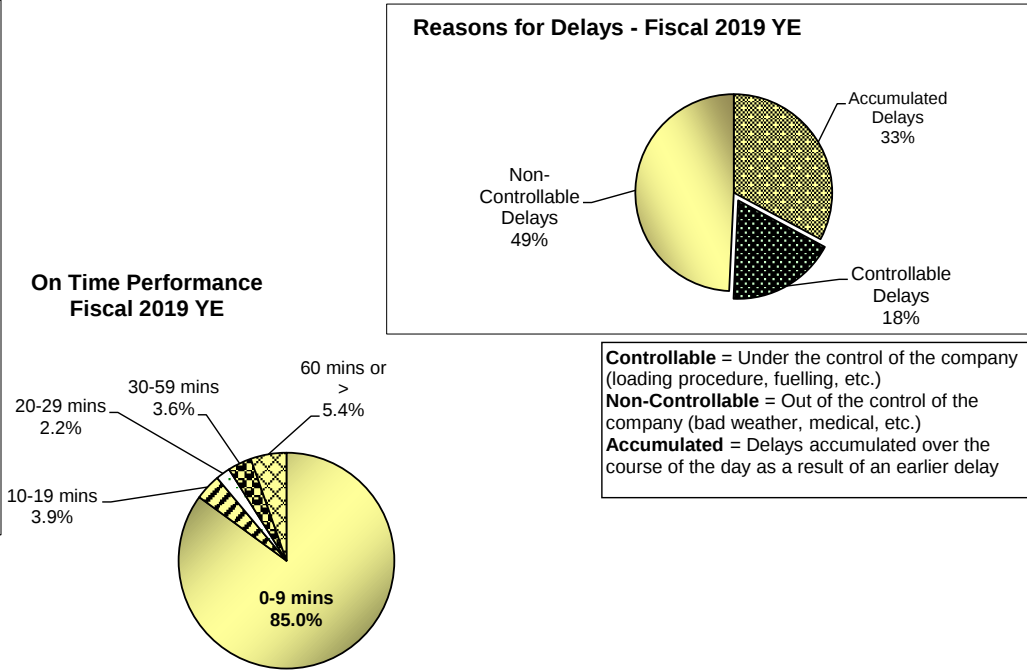
Fiscal 2019

Year Ended March 31, 2019

Northern Routes



Routes	Route Description	Actual RTs	Round Trips Required	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 10	Port Hardy-Prince Rupert	89.0	83.0	6.0	0.0%
Route 11	Skidegate-Prince Rupert	163.5	159.5	4.0	1.5%
Route 28	Port Hardy-Bella Coola	36.0	33.0	3.0	0.0%
NORTHERN Routes Total		288.5	275.5	13.0	0.4%

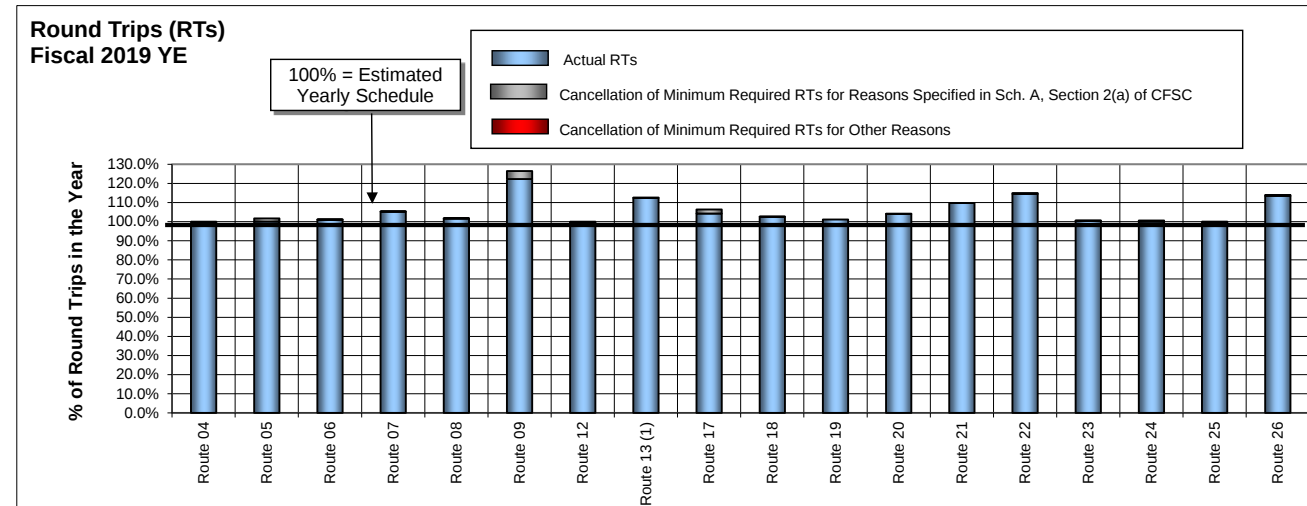


Round Trip Service Delivery and On Time Performance

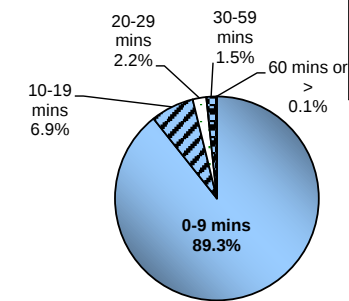
Fiscal 2019

Year Ended March 31, 2019

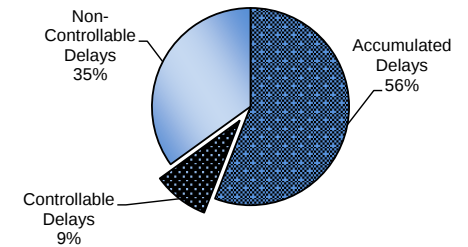
Minor Routes



On Time Performance Fiscal 2019 YE



Reasons for Delays - Fiscal 2019 YE

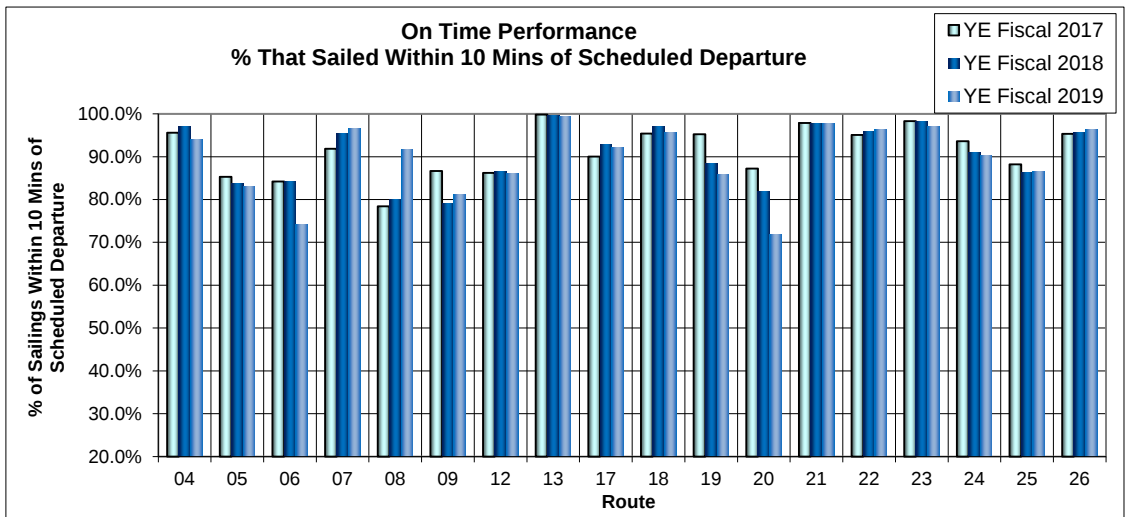


Controllable = Under the control of the company (loading procedure, fuelling, etc.)
Non-Controllable = Out of the control of the company (bad weather, medical, etc.)
Accumulated = Delays accumulated over the course of the day as a result of an earlier delay

Routes	Route Description	Actual RTs	Round Trips Required	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 04	Swartz Bay-Fulford Harbour	2,873.0	2,879.0	-6.0	11.5%
Route 05	Swartz Bay-Gulf Islands	3,467.0	3,465.0	2.0	4.1%
Route 06	Crofton-Vesuvius Bay	4,487.0	4,440.0	47.0	17.2%
Route 07	Earls Cove-Saltery Bay	2,642.0	2,510.0	132.0	2.4%
Route 08	Horseshoe Bay-Bowen Island	5,419.5	5,334.0	85.5	11.3%
Route 09	Tsawwassen-Southern Gulf Islands	993.0	812.0	181.0	3.6%
Route 12	Mill Bay-Brentwood Bay	3,195.0	3,214.0	-19.0	24.0%
Route 13 ⁽¹⁾	Langdale-Keats/Gambier	4,573.0	4,068.0	505.0	Pass Only
Route 17	Little River-Powell River	1,422.0	1,364.0	58.0	2.9%
Route 18	Powell River-Texada	2,884.5	2,813.0	71.5	2.7%
Route 19	Nanaimo Harbour-Gabriola Island	4,951.5	4,896.0	55.5	11.1%
Route 20	Chemainus-Thetis/Penelakut	3,850.0	3,700.0	150.0	3.3%
Route 21	Buckley Bay-Denman West	5,772.0	5,260.0	512.0	7.1%
Route 22	Gravelly Bay-Hornby Island	4,647.0	4,058.0	589.0	16.8%
Route 23	Campbell River-Quadra Island	5,806.0	5,782.0	24.0	16.8%
Route 24	Quadra Island-Cortes Island	2,135.0	2,135.0	0.0	12.4%
Route 25	Port McNeill-Sointula/Alert Bay	3,942.0	3,958.0	-16.0	2.4%
Route 26	Skidegate-Alliford Bay	3,311.5	2,918.0	393.5	3.2%
MINOR Routes Total		66,371.0	63,606.0	2,765.0	9.3%

Notes:

⁽¹⁾ Route 13: Core service levels include some round trips that are deliverable only 'on demand.'

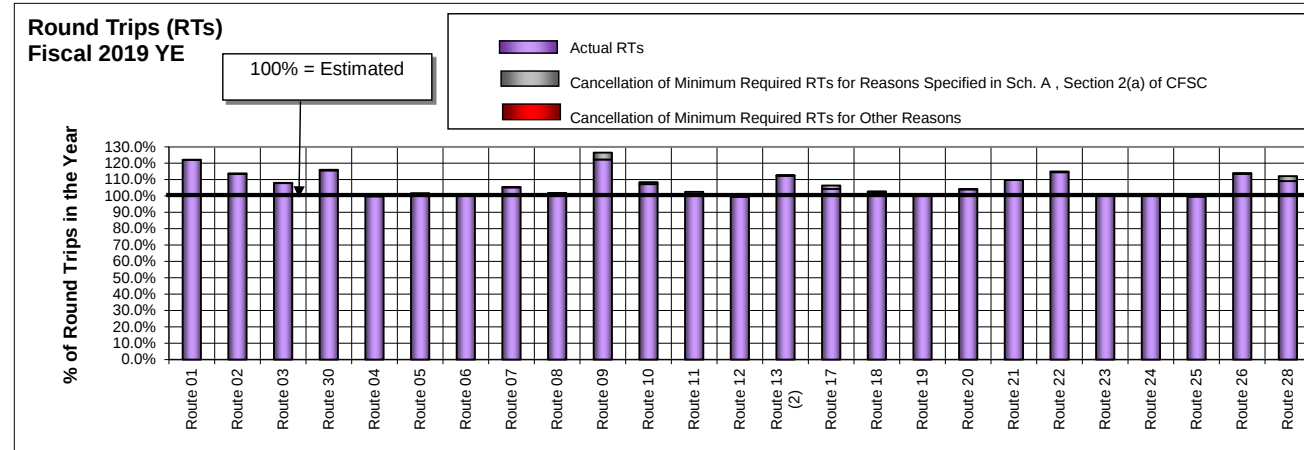


Round Trip Service Delivery and On Time Performance

Fiscal 2019

Year Ended March 31, 2019

All Routes



Routes	Route Description	Actual RTs	Round Trips Required ⁽¹⁾	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 01	Swartz Bay-Tsawwassen	4,285.0	12,254.0	1,045.5	49.5%
Route 02	Horseshoe Bay-Nanaimo	3,087.5			34.5%
Route 03	Langdale-Horseshoe Bay	3,176.5			28.4%
Route 30	Nanaimo-Tsawwassen	2,750.5			28.0%
Route 04	Swartz Bay-Fulford Harbour	2,873.0	2,879.0	-6.0	11.5%
Route 05	Swartz Bay-Gulf Islands	3,467.0	3,465.0	2.0	4.1%
Route 06	Crofton-Vesuvius Bay	4,487.0	4,440.0	47.0	17.2%
Route 07	Earls Cove-Salter Bay	2,642.0	2,510.0	132.0	2.4%
Route 08	Horseshoe Bay-Bowen Island	5,419.5	5,334.0	85.5	11.3%
Route 09	Tsawwassen-Southern Gulf Islands	993.0	812.0	181.0	3.6%
Route 10	Port Hardy-Prince Rupert	89.0	83.0	6.0	0.0%
Route 11	Skidegate-Prince Rupert	163.5	159.5	4.0	1.5%
Route 12	Mill Bay-Brentwood Bay	3,195.0	3,214.0	-19.0	24.0%
Route 13 ⁽²⁾	Langdale-Keats/Gambier	4,573.0	4,068.0	505.0	Pass Only
Route 17	Little River-Powell River	1,422.0	1,364.0	58.0	2.9%
Route 18	Powell River-Texada	2,884.5	2,813.0	71.5	2.7%
Route 19	Nanaimo Harbour-Gabriola Island	4,951.5	4,896.0	55.5	11.1%
Route 20	Chemainus-Thetis/Penelakut	3,850.0	3,700.0	150.0	3.3%
Route 21	Buckley Bay-Denman West	5,772.0	5,260.0	512.0	7.1%
Route 22	Gravelly Bay-Hornby Island	4,647.0	4,058.0	589.0	16.8%
Route 23	Campbell River-Quadra Island	5,806.0	5,782.0	24.0	16.8%
Route 24	Quadra Island-Cortes Island	2,135.0	2,135.0	0.0	12.4%
Route 25	Port McNeill-Sointula/Alert Bay	3,942.0	3,958.0	-16.0	2.4%
Route 26	Skidegate-Alliford Bay	3,311.5	2,918.0	393.5	3.2%
Route 28	Port Hardy-Bella Coola	36.0	33.0	3.0	0.0%
All Routes Total		79,959.0	76,135.5	3,823.5	13.6%

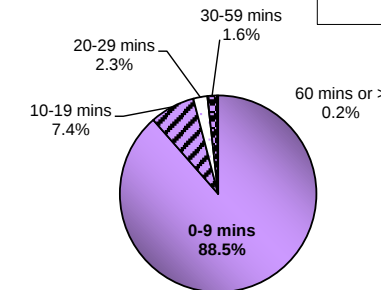
Notes:

⁽¹⁾ For Major Routes, the annual number of round trips required under the Coastal Ferry Services Contract includes minimums for each individual route as well as an aggregate total for the four routes (Route 1, 2, 3 and 30).

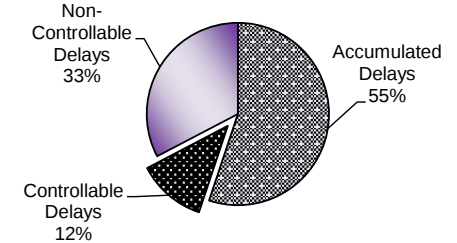
⁽²⁾ Route 13: Core service levels include some round trips that are deliverable only 'on demand.'

⁽³⁾ Within 10 minutes of scheduled arrival for the Northern Routes 10, 11 and 28.

On Time Performance Fiscal 2019 YE

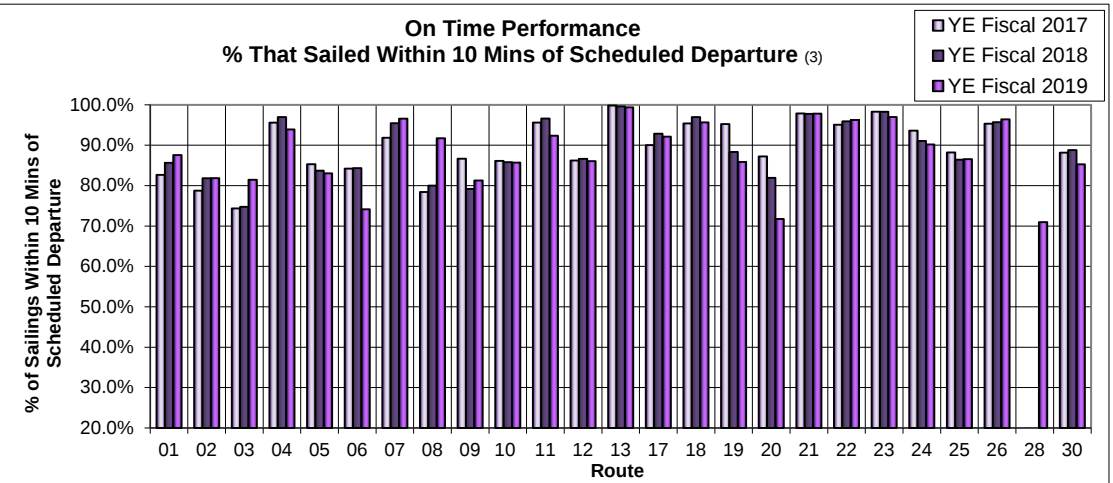


Reasons for Delays - Fiscal 2019 YE



Controllable = Under the control of the company (loading procedure, fuelling, etc.)
Non-Controllable = Out of the control of the company (bad weather, medical, etc.)
Accumulated = Delays accumulated over the course of the day as a result of an earlier delay

On Time Performance % That Sailed Within 10 Mins of Scheduled Departure ⁽³⁾



Route Financial Report

Year Ended March 31, 2019





British Columbia Ferry Services Inc.
Route Statement
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	Corporate Total		Major Routes		Northern Routes		Minor Routes		Unregulated Routes	
	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	618,215	640,234	522,605	529,358	14,452	16,879	81,158	93,997	-	-
Ancillary Revenue	74,953	71,437	65,989	62,832	3,808	3,900	5,156	4,705	-	-
Social Program Fees	15,553	17,332	8,261	8,714	952	1,109	6,340	7,509	-	-
Contracted Routes Fee	2,796	2,756	-	-	-	-	-	-	2,796	2,756
Total Operating Revenue	711,517	731,759	596,855	600,904	19,212	21,888	92,654	106,211	2,796	2,756
Total Operating Expenses	647,016	632,748	434,666	421,284	45,192	44,651	164,362	164,057	2,796	2,756
Earnings (Loss) from Operations	64,501	99,011	162,189	179,620	(25,980)	(22,763)	(71,708)	(57,846)	-	-
Depreciation and Amortization	(173,250)	(159,916)	(106,187)	(96,888)	(16,671)	(15,848)	(50,392)	(47,180)	-	-
Financing Expense	(53,373)	(55,422)	(27,537)	(28,263)	(6,771)	(7,217)	(19,065)	(19,942)	-	-
Cost of Capital	(226,623)	(215,338)	(133,724)	(125,151)	(23,442)	(23,065)	(69,457)	(67,122)	-	-
Gain (Loss) on Disposal and Revaluation of Capital Assets	258	(1,178)	103	(666)	32	(21)	123	(491)	-	-
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(161,864)	(117,505)	28,568	53,803	(49,390)	(45,849)	(141,042)	(125,459)	-	-
Ferry Transportation Fees	188,244	158,743	15,582	-	66,966	62,575	105,696	96,168	-	-
Federal-Provincial Subsidy Agreement	30,504	29,782	-	-	7,827	7,642	22,677	22,140	-	-
Net Regulatory Earnings (Loss)	56,884	71,020	44,150	53,803	25,403	24,368	(12,669)	(7,151)	-	-
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	(84)	8,630	(111)	6,216	71	730	(44)	1,684	-	-
Fuel Rebates Paid	(4,585)	(19,386)	(3,759)	(15,667)	(104)	(373)	(722)	(3,346)	-	-
Provincial Contributions to Fuel Deferral Accounts	(26)	(291)	-	-	(26)	(291)	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	52,189	59,973	40,280	44,352	25,344	24,434	(13,435)	(8,813)	-	-

The British Columbia Ferries Commissioner has authorized the use of deferred fuel cost accounts whereby differences between actual fuel costs and approved fuel costs used to develop regulated price caps are deferred for settlement in future tariffs. Also as authorized by the Commissioner, the Company collects fuel surcharges or provides fuel rebates which are applied against deferred fuel cost account balances.

Included in the Fuel Rebates Paid in the above statement are fuel rebates applied against tariffs paid by the Province of British Columbia on behalf of customers travelling under Social Programs. During the year ended March 31, 2019, the Province received fuel rebates of \$0.03 million (March 31, 2018: \$0.29 million).



British Columbia Ferry Services Inc.
Route Statement
Major Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	01-Tsawwassen - Swartz Bay		02-Horseshoe Bay - Nanaimo		03-Horseshoe Bay - Langdale		30-Nanaimo - Tsawwassen		Major Routes	
	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	248,287	245,944	132,546	134,804	43,380	50,915	98,392	97,695	522,605	529,358
Ancillary Revenue	32,231	30,775	16,463	15,820	7,307	6,786	9,988	9,451	65,989	62,832
Social Program Fees	2,530	2,488	2,704	2,737	2,162	2,654	865	835	8,261	8,714
Contracted Routes Fee	-	-	-	-	-	-	-	-	-	-
Total Operating Revenue	283,048	279,207	151,713	153,361	52,849	60,355	109,245	107,981	596,855	600,904
Total Operating Expenses	176,784	170,038	110,291	107,784	50,087	51,386	97,504	92,076	434,666	421,284
Earnings (Loss) from Operations	106,264	109,169	41,422	45,577	2,762	8,969	11,741	15,905	162,189	179,620
Depreciation and Amortization	(47,496)	(39,140)	(24,772)	(23,544)	(11,485)	(11,638)	(22,434)	(22,566)	(106,187)	(96,888)
Financing Expense	(13,996)	(11,968)	(5,406)	(5,949)	(2,510)	(2,885)	(5,625)	(7,461)	(27,537)	(28,263)
Cost of Capital	(61,492)	(51,108)	(30,178)	(29,493)	(13,995)	(14,523)	(28,059)	(30,027)	(133,724)	(125,151)
Gain (Loss) on Disposal and Revaluation of Capital Assets	30	(311)	22	(182)	5	(68)	46	(105)	103	(666)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	44,802	57,750	11,266	15,902	(11,228)	(5,622)	(16,272)	(14,227)	28,568	53,803
Ferry Transportation Fees	5,285	-	3,437	-	4,681	-	2,179	-	15,582	-
Federal-Provincial Subsidy Agreement	-	-	-	-	-	-	-	-	-	-
Net Regulatory Earnings (Loss)	50,087	57,750	14,703	15,902	(6,547)	(5,622)	(14,093)	(14,227)	44,150	53,803
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	(1,052)	2,369	387	1,624	170	616	384	1,607	(111)	6,216
Fuel Rebates Paid	(1,806)	(7,184)	(942)	(4,003)	(328)	(1,639)	(683)	(2,841)	(3,759)	(15,667)
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	47,229	52,935	14,148	13,523	(6,705)	(6,645)	(14,392)	(15,461)	40,280	44,352

The British Columbia Ferries Commissioner has authorized the use of deferred fuel cost accounts whereby differences between actual fuel costs and approved fuel costs used to develop regulated price caps are deferred for settlement in future tariffs. Also as authorized by the Commissioner, the Company collects fuel surcharges or provides fuel rebates which are applied against deferred fuel cost account balances.

Included in the Fuel Rebates Paid in the above statement are fuel rebates applied against tariffs paid by the Province of British Columbia on behalf of customers travelling under Social Programs. During the year ended March 31, 2019, the Province received fuel rebates of \$0.03 million (March 31, 2018: \$0.29 million).

Fiscal 2019 Ferry Transportation Fees on the Major Routes consist of provincial contributions to fund discounts for BC seniors travelling on those routes and to hold fares at 2018 levels.



British Columbia Ferry Services Inc.
Route Statement
Northern Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	10-Bear Cove - Bella Bella - Prince Rupert		11-Prince Rupert - Skidegate		28-Port Hardy - Bella Coola		Northern Routes	
	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	9,005	11,163	5,261	5,716	186	-	14,452	16,879
Ancillary Revenue	2,251	2,521	1,509	1,379	48	-	3,808	3,900
Social Program Fees	356	451	595	658	1	-	952	1,109
Contracted Routes Fee	-	-	-	-	-	-	-	-
Total Operating Revenue	11,612	14,135	7,365	7,753	235	-	19,212	21,888
Total Operating Expenses	24,058	26,266	17,820	18,385	3,314	-	45,192	44,651
Earnings (Loss) from Operations	(12,446)	(12,131)	(10,455)	(10,632)	(3,079)	-	(25,980)	(22,763)
Depreciation and Amortization	(8,729)	(8,772)	(6,987)	(7,076)	(955)	-	(16,671)	(15,848)
Financing Expense	(3,669)	(4,112)	(2,751)	(3,105)	(351)	-	(6,771)	(7,217)
Cost of Capital	(12,398)	(12,884)	(9,738)	(10,181)	(1,306)	-	(23,442)	(23,065)
Gain (Loss) on Disposal and Revaluation of Capital Assets	11	(15)	21	(6)	-	-	32	(21)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(24,833)	(25,030)	(20,172)	(20,819)	(4,385)	-	(49,390)	(45,849)
Ferry Transportation Fees	33,363	35,455	27,580	27,120	6,023	-	66,966	62,575
Federal-Provincial Subsidy Agreement	1,521	1,485	6,306	6,157	-	-	7,827	7,642
Net Regulatory Earnings (Loss)	10,051	11,910	13,714	12,458	1,638	-	25,403	24,368
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS								
Fuel Costs Deferred	35	484	30	246	6	-	71	730
Fuel Rebates Paid	(61)	(239)	(43)	(134)	-	-	(104)	(373)
Provincial Contributions to Fuel Deferral Accounts	(26)	(193)	-	(98)	-	-	(26)	(291)
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	9,999	11,962	13,701	12,472	1,644	-	25,344	24,434

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British Columbia Ferry Services Inc.
Route Statement
Minor Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	04-Swartz Bay - Fulford Harbour		05-Swartz Bay - Gulf Islands		06-Vesuvius Bay - Crofton		07-Salterty Bay - Earls Cove		08-Horseshoe Bay - Snug Cove	
	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	6,554	7,551	5,231	6,223	5,065	5,872	6,333	7,352	9,643	11,020
Ancillary Revenue	261	249	396	340	23	15	408	377	574	539
Social Program Fees	495	575	575	737	376	474	374	430	979	1,131
Contracted Routes Fee	-	-	-	-	-	-	-	-	-	-
Total Operating Revenue	7,310	8,375	6,202	7,300	5,464	6,361	7,115	8,159	11,196	12,690
Total Operating Expenses	11,437	10,196	20,946	19,914	6,029	6,632	13,864	14,377	14,595	15,271
Earnings (Loss) from Operations	(4,127)	(1,821)	(14,744)	(12,614)	(565)	(271)	(6,749)	(6,218)	(3,399)	(2,581)
Depreciation and Amortization	(1,892)	(1,982)	(6,014)	(4,450)	(1,518)	(2,266)	(3,674)	(3,825)	(4,046)	(3,786)
Financing Expense	(706)	(795)	(1,668)	(1,423)	(80)	(358)	(1,386)	(1,552)	(1,196)	(1,288)
Cost of Capital	(2,598)	(2,777)	(7,682)	(5,873)	(1,598)	(2,624)	(5,060)	(5,377)	(5,242)	(5,074)
Gain (Loss) on Disposal and Revaluation of Capital Assets	92	15	23	(11)	-	(7)	1	(9)	1	(14)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(6,633)	(4,583)	(22,403)	(18,498)	(2,163)	(2,902)	(11,808)	(11,604)	(8,640)	(7,669)
Ferry Transportation Fees	3,581	2,835	18,336	17,683	3,414	2,835	12,385	11,731	7,038	5,957
Federal-Provincial Subsidy Agreement	1,344	1,312	4,232	4,131	12	12	2,807	2,741	1,426	1,392
Net Regulatory Earnings (Loss)	(1,708)	(436)	165	3,316	1,263	(55)	3,384	2,868	(176)	(320)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	37	130	23	356	7	28	49	207	48	188
Fuel Rebates Paid	(61)	(275)	(50)	(237)	(47)	(215)	(50)	(253)	(86)	(393)
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	(1,732)	(581)	138	3,435	1,223	(242)	3,383	2,822	(214)	(525)

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British Columbia Ferry Services Inc.
Route Statement
Minor Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	09-Tsawwassen - Gulf Islands		12-Mill Bay - Brentwood		13-Langdale - Gambier Island - Keats Island		17-Comox - Powell River		18-Texada Island - Powell River	
	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	14,199	16,349	2,090	2,459	154	202	10,804	12,155	1,158	1,377
Ancillary Revenue	2,048	1,866	14	10	20	19	1,149	1,023	38	62
Social Program Fees	210	268	7	6	4	6	1,114	1,342	180	230
Contracted Routes Fee	-	-	-	-	-	-	-	-	-	-
Total Operating Revenue	16,457	18,483	2,111	2,475	178	227	13,067	14,520	1,376	1,669
Total Operating Expenses	23,164	24,760	2,765	2,712	613	614	16,743	17,290	5,663	5,961
Earnings (Loss) from Operations	(6,707)	(6,277)	(654)	(237)	(435)	(387)	(3,676)	(2,770)	(4,287)	(4,292)
Depreciation and Amortization	(6,915)	(6,319)	(854)	(865)	(7)	(8)	(6,311)	(5,273)	(1,745)	(2,015)
Financing Expense	(3,740)	(3,766)	(100)	(136)	0	0	(3,833)	(3,649)	(325)	(548)
Cost of Capital	(10,655)	(10,085)	(954)	(1,001)	(7)	(8)	(10,144)	(8,922)	(2,070)	(2,563)
Gain (Loss) on Disposal and Revaluation of Capital Assets	2	(415)	-	(3)	-	-	2	(16)	-	(2)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(17,360)	(16,777)	(1,608)	(1,241)	(442)	(395)	(13,818)	(11,708)	(6,357)	(6,857)
Ferry Transportation Fees	11,934	10,359	1,698	1,410	361	322	9,275	8,121	4,703	4,531
Federal-Provincial Subsidy Agreement	2,479	2,420	0	0	77	75	1,944	1,898	1,084	1,058
Net Regulatory Earnings (Loss)	(2,947)	(3,998)	90	169	(4)	2	(2,599)	(1,689)	(570)	(1,268)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	(144)	268	4	15	(20)	(12)	(137)	136	10	39
Fuel Rebates Paid	(122)	(509)	(22)	(101)	(1)	(7)	(93)	(452)	(11)	(59)
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	(3,213)	(4,239)	72	83	(25)	(17)	(2,829)	(2,005)	(571)	(1,288)

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British Columbia Ferry Services Inc.
Route Statement
Minor Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	19-Gabriola Island - Nanaimo Harbour		20-Thetis Island - Penelakut Island - Chemainus		21-Denman Island - Buckley Bay		22-Hornby Island - Denman Island		23-Quadra Island - Campbell River	
	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	5,206	6,195	1,213	1,443	3,229	3,803	1,534	1,753	5,217	6,161
Ancillary Revenue	31	33	2	2	26	15	29	47	86	52
Social Program Fees	507	595	230	273	259	304	26	21	531	631
Contracted Routes Fee	-	-	-	-	-	-	-	-	-	-
Total Operating Revenue	5,744	6,823	1,445	1,718	3,514	4,122	1,589	1,821	5,834	6,844
Total Operating Expenses	7,735	8,267	5,467	4,343	5,174	5,553	4,179	3,407	9,770	9,321
Earnings (Loss) from Operations	(1,991)	(1,444)	(4,022)	(2,625)	(1,660)	(1,431)	(2,590)	(1,586)	(3,936)	(2,477)
Depreciation and Amortization	(2,409)	(2,977)	(1,576)	(984)	(2,503)	(2,767)	(2,253)	(1,397)	(1,284)	(2,115)
Financing Expense	(523)	(593)	(407)	(335)	(1,417)	(1,698)	(831)	(769)	(331)	(364)
Cost of Capital	(2,932)	(3,570)	(1,983)	(1,319)	(3,920)	(4,465)	(3,084)	(2,166)	(1,615)	(2,479)
Gain (Loss) on Disposal and Revaluation of Capital Assets	1	(8)	-	(2)	-	(4)	-	(2)	1	(7)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(4,922)	(5,022)	(6,005)	(3,946)	(5,580)	(5,900)	(5,674)	(3,754)	(5,550)	(4,963)
Ferry Transportation Fees	3,766	3,003	4,628	4,458	4,726	4,282	3,746	3,582	3,847	3,191
Federal-Provincial Subsidy Agreement	719	701	1,067	1,042	1,025	1,001	857	837	764	746
Net Regulatory Earnings (Loss)	(437)	(1,318)	(310)	1,554	171	(617)	(1,071)	665	(939)	(1,026)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	15	69	9	32	4	13	2	11	16	68
Fuel Rebates Paid	(48)	(217)	(13)	(56)	(28)	(138)	(11)	(57)	(46)	(226)
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	(470)	(1,466)	(314)	1,530	147	(742)	(1,080)	619	(969)	(1,184)

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British Columbia Ferry Services Inc.
Route Statement
Minor Routes
For the Twelve Months Ended March 31, 2019
(in \$ 000's)

	24-Cortes Island - Quadra Island		25-Alert Bay - Sointula - Port McNeill		26-Skidegate - Alliford Bay		Minor Routes	
	2019	2018	2019	2018	2019	2018	2019	2018
Tariff and Reservation Revenue	984	1,170	1,762	2,060	782	852	81,158	93,997
Ancillary Revenue	9	9	20	17	22	30	5,156	4,705
Social Program Fees	228	202	202	240	43	44	6,340	7,509
Contracted Routes Fee	-	-	-	-	-	-	-	-
Total Operating Revenue	1,221	1,381	1,984	2,317	847	926	92,654	106,211
Total Operating Expenses	4,641	3,807	7,564	6,362	4,013	5,270	164,362	164,057
Earnings (Loss) from Operations	(3,420)	(2,426)	(5,580)	(4,045)	(3,166)	(4,344)	(71,708)	(57,846)
Depreciation and Amortization	(2,192)	(1,686)	(3,555)	(2,827)	(1,644)	(1,638)	(50,392)	(47,180)
Financing Expense	(638)	(596)	(1,363)	(1,521)	(521)	(551)	(19,065)	(19,942)
Cost of Capital	(2,830)	(2,282)	(4,918)	(4,348)	(2,165)	(2,189)	(69,457)	(67,122)
Gain (Loss) on Disposal and Revaluation of Capital Assets	-	(2)	-	(3)	-	(1)	123	(491)
Route Earnings (Loss) Before Ferry Service Fees & Federal Contract	(6,250)	(4,710)	(10,498)	(8,396)	(5,331)	(6,534)	(141,042)	(125,459)
Ferry Transportation Fees	2,929	2,822	4,794	4,586	4,535	4,460	105,696	96,168
Federal-Provincial Subsidy Agreement	675	660	1,098	1,072	1,067	1,042	22,677	22,140
Net Regulatory Earnings (Loss)	(2,646)	(1,228)	(4,606)	(2,738)	271	(1,032)	(12,669)	(7,151)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS								
Fuel Costs Deferred	10	42	18	76	5	18	(44)	1,684
Fuel Rebates Paid	(9)	(46)	(17)	(76)	(7)	(29)	(722)	(3,346)
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	(2,645)	(1,232)	(4,605)	(2,738)	269	(1,043)	(13,435)	(8,813)

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Part 2

Service Quality



Part 2: Service Quality

Overview

BC Ferries' vision is to be "*Trusted, Valued*". BC Ferries recognizes that to earn the public's trust and provide a service customers value, it needs to engage in meaningful ways with its customers and the communities it serves.

BC Ferries receives customer-initiated feedback through letters, emails, phone calls, tweets, Facebook posts and the online feedback form. The Company also receives feedback through its customer satisfaction survey. BC Ferries works hard to respond promptly to those customers who provide feedback and endeavours to ensure that the concerns they express independently and/or through the customer satisfaction survey are looked into and appropriately addressed.

BC Ferries believes in the importance of actively engaging the community and its customers in the decisions it makes that affect them most. When adding, changing or developing services and significant projects in the communities it serves, BC Ferries follows a process of community consultation and engagement, known as its *Stakeholder and Community Engagement Framework*.

BC Ferries regularly meets with communities, First Nations, business and specific interest groups all along coastal British Columbia, to hear concerns, suggestions and requests. The majority of coastal communities are represented by one of 13 ferry advisory committees, which are comprised of local community representatives. These committees serve as liaisons with communities and customers, and are viewed by the Company as important contributors to a well-functioning coastal ferry service.

BC Ferries also engages with community members on significant terminal upgrades and other major projects it plans to undertake. This engagement takes many forms, from organizing community information meetings and open houses, to online surveys and meetings with community leaders and other key stakeholders. The goal is to involve communities and customers in the decisions that impact them and incorporate their input and feedback where possible.

This part of the report provides information on the feedback BC Ferries received from its customers in fiscal 2019, as well as the key stakeholder and community engagement initiatives it undertook during the year. The following two reports are included:

Feedback and Engagement Report

This report contains a consolidated summary of the customer-initiated feedback BC Ferries received through all reporting channels on all of the designated ferry routes during the fiscal year, and describes the actions taken in response. It also provides an overview of key community and stakeholder engagement initiatives undertaken throughout the fiscal year and the themes that emerged from those consultation processes.

Customer Satisfaction Tracking Report

As in past years, the Company commissioned an independent professional consulting organization to conduct and document a comprehensive customer satisfaction survey. In addition to meeting BC Ferries' obligations under the Contract, the survey is an important part of the Company's ongoing market research program that supports various operational and marketing initiatives. For comparative purposes, each year's survey since 2003 has included an identical set of questions, with periodic minor modifications.

BC Ferries' 2018 Customer Service Satisfaction Tracking Surveys indicates that 88% of customers surveyed (compared to 87% in 2017) reported being satisfied with their overall trip experience. A copy of the 2018 customer satisfaction tracking annual report is provided.

Feedback and Engagement Report

Year Ended March 31, 2019



Feedback and Engagement Report

Fiscal 2019



Part A: Customer Initiated Feedback



Fiscal 2019 Customer Initiated Feedback



Executive Summary

BC Ferries receives customer-initiated feedback through letters, emails, phone calls, tweets, Facebook posts and the online feedback form. During the year ended March 31, 2019 (Fiscal 2019 or FY 2019), 22.3 million customers travelled with BC Ferries, a 1.4% increase over the previous year (Fiscal 2018 or FY 2018). During this period:

- A total of 11,868 comments were received, compared to 10,279 for the prior year, an increase of 15%
- The average time to respond to customers was 13 days compared to 6 days for Fiscal 2018 due to the volume of refund and compensation requests received during Fiscal 2019 related to several incidents
- Positive feedback made up 10% of all customer comments received
- The top five complaints represented 38% (4,467) of all comments received during Fiscal 2019, compared to 31% (3,195) for Fiscal 2018

Trends identified in Fiscal 2019 include:

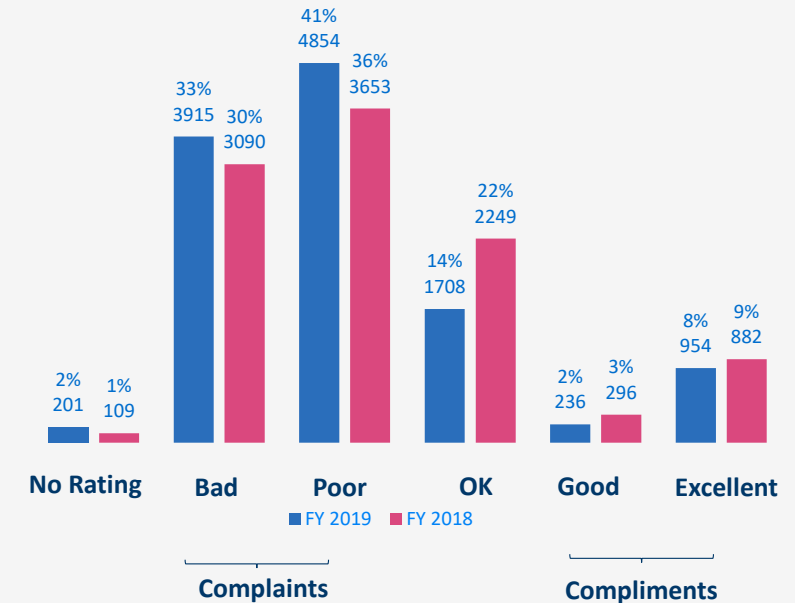
- Sailing cancellations occurring in April and May 2018, and the delay of the *Northern Sea Wolf's* entry into service, contributed to significant feedback and requests for compensation. A review of BC Ferries' communication strategy for service impacts was undertaken to improve distribution of communication and responsiveness to customers during an incident.
- Value for Money for fares continues to be reported as an issue for travel between Vancouver and Vancouver Island, but is no longer a top issue for the other routes. The implementation of a fare reduction on Minor and Northern Routes and the reinstatement of free travel for BC seniors likely contributed to this change. This and a fare freeze on the Major Routes likely contributed to the 6.4% increase in overall customer satisfaction, an all-time high for this measure.
- Feedback related to the website's ease of use, inability to make a Northern route booking online, mobile responsiveness, and timeliness of updates were the main areas of concern. The new website, launching fall 2019, focuses on design and functionality that will improve the customer experience in these areas.
- The introduction of a new booking system in March 2018, accounted for part of the two per cent increase in customer feedback. As with any new software implementation, there were minor software issues, that once resolved improved customer experience and reduced calls.

Distribution of Total Comments by Rating

Total Comments*

2019 = 11,868

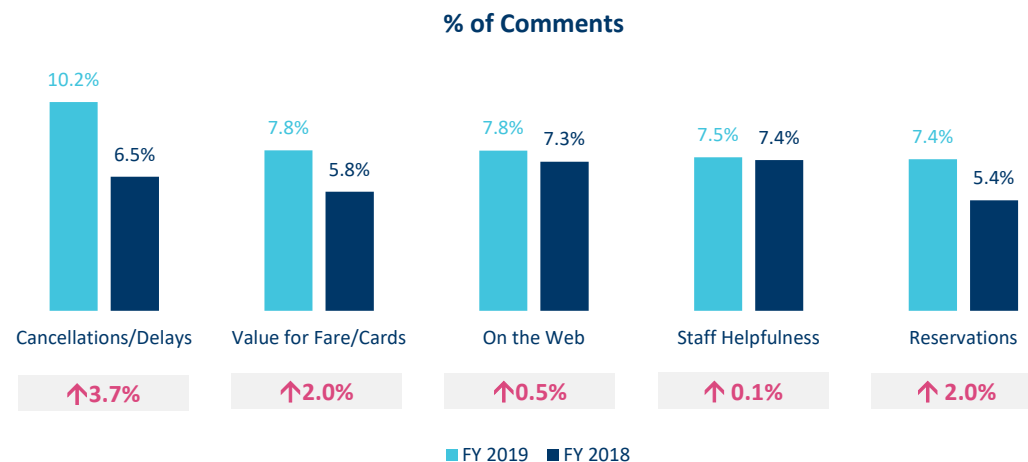
2018 = 10,279



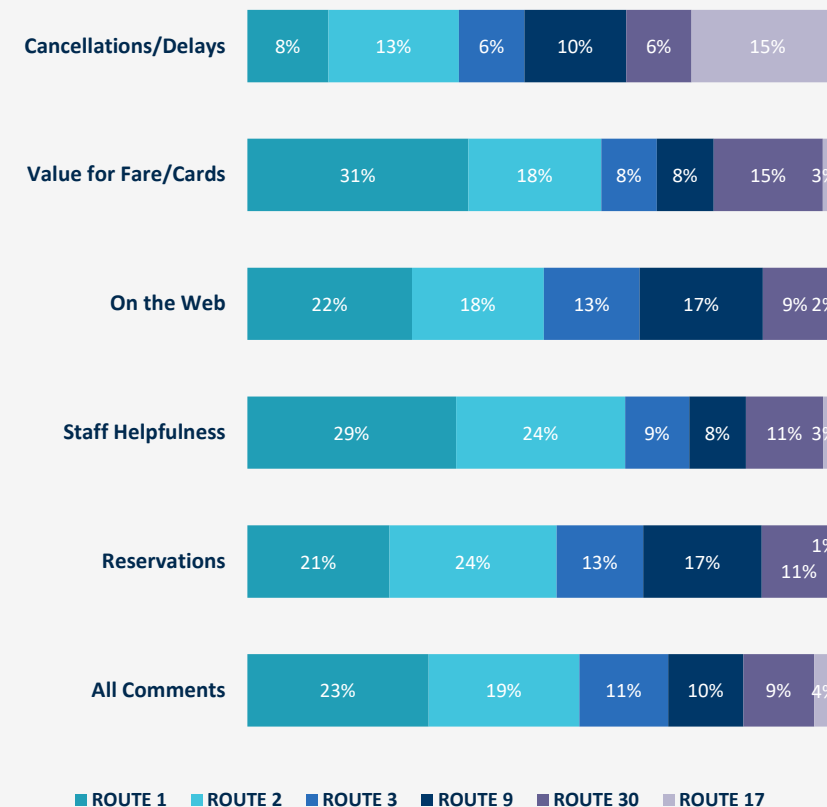
*Comments in this analysis exclude General comments and comments for which no rating is provided:
709 General comments received made up of community issues (289), company information (323) and environment (97)
201 comments were provided with no rating
There were 10,958 comments used for further analysis as they were specific to a route or region.

Top 5 Customer Complaints

#	Complaint	FY 2019		FY 2018	
		Complaints (n=8427)*	% of Comments (n=10958)**	Complaints (n=6401)*	% of Comments (n=9247)**
1	Cancellations/Delays	1118	10.2%	605	6.5%
2	Value for Fare/Cards	859	7.8%	537	5.8%
3	On the Web	858	7.8%	673	7.3%
4	Staff Helpfulness	821	7.5%	680	7.4%
5	Reservations	811	7.4%	498	5.4%

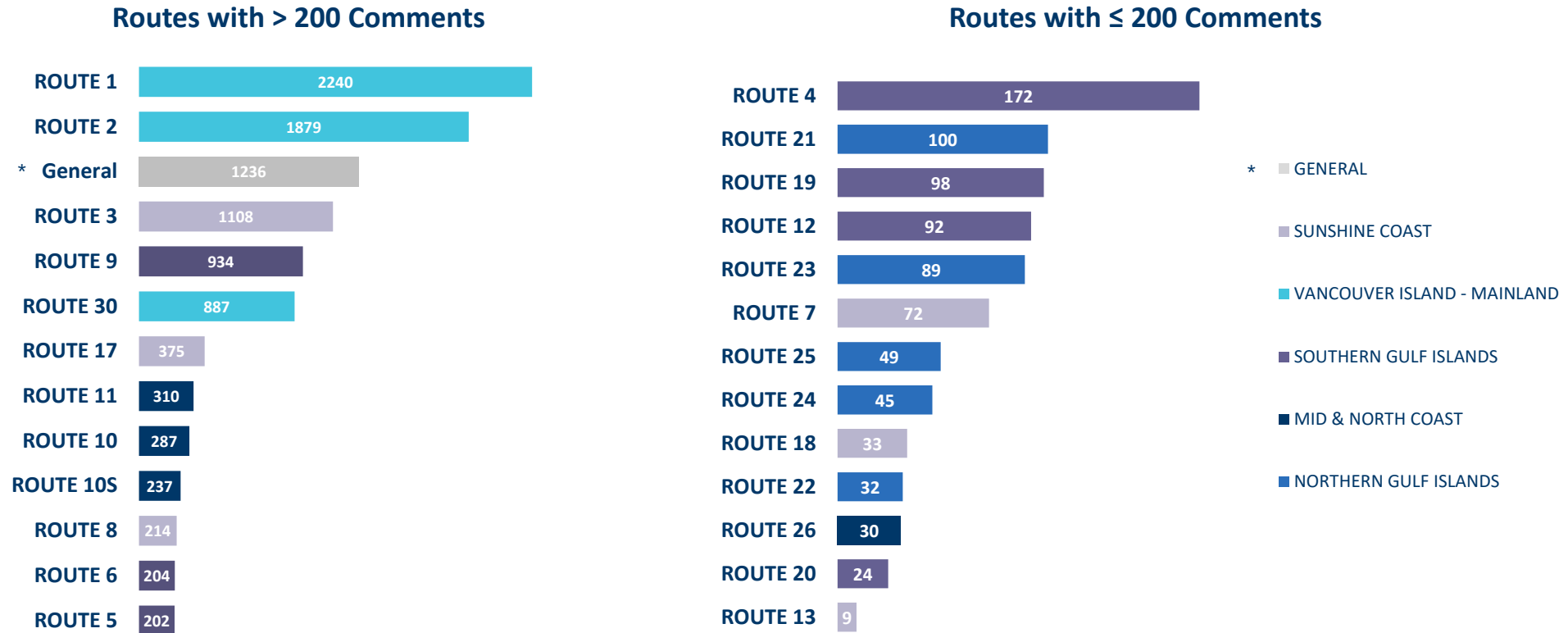


Comment Distribution by Route



*Complaints = "bad" or "poor" rating accompanied by a comment
 **Excludes comments classified as General and comments with no rating provided

Overall System Wide Comments by Route



* Comments with no route specified

Regional Comments

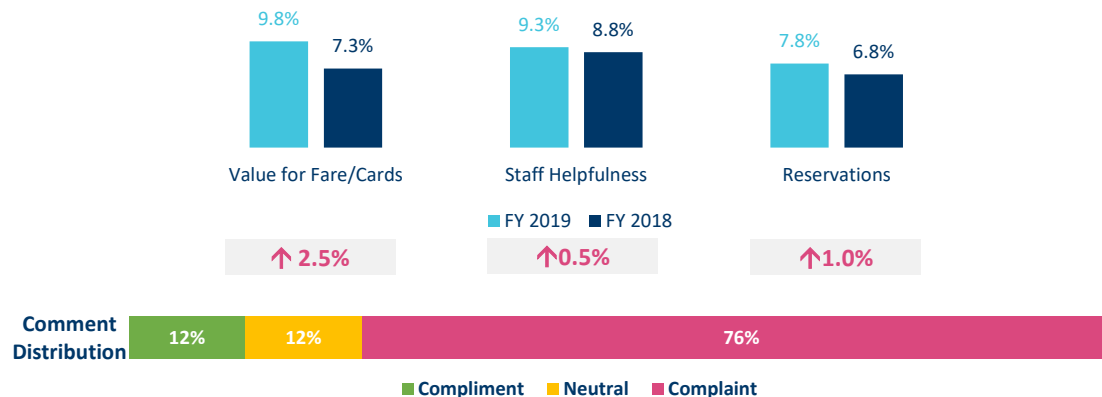
Vancouver Island - Mainland:



46% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=3830)*	% of Comments (n=5006)*	Complaints (n=2903)*	% of Comments (n=4115)*
1	Value for Fare/Cards	491	9.8%	301	7.3%
2	Staff Helpfulness	465	9.3%	363	8.8%
3	Reservations	389	7.8%	278	6.8%

**'Vancouver Island – Mainland' Complaints as a % Of All
'Vancouver Island to Mainland' Comments****



Sample Customer Comments

Complaints (3830)

- Customer called regarding a fare discrepancy for travel from Swartz Bay to Tsawwassen, as she was charged as a commercial vehicle for her Ford F-350. She has travelled for years on this route in this vehicle and this was the first time she was charged the commercial rate. She requested a refund for the difference in fares.
- Customer wrote: "I travelled to Tsawwassen on the 4:00 pm ferry as a walk-on passenger with my 12 year old child who was picked up at the terminal by family friends. I returned on the same ferry back to Swartz Bay. I was disappointed that BC Ferries charged me two adult fares, even though I only dropped off my child. I would have thought that one trip would have been free as a courtesy to families. This needs to change."
- Customer wrote: "After paying for access to the Seawest Lounge, I requested a dairy-free alternate as I'm lactose intolerant. I asked twice, however, the attendant didn't provide this and did not help me with my dietary request."
- Customer who called was frustrated with the online and telephone booking system. He attempted to make a reservation multiple times unsuccessfully and once he reached the Customer Service Centre, the sailing was no longer available.
- Customer wrote: "Your \$17 reservation fee is exorbitant!"

Compliments (585)

- Customer wrote: "The staff in the Pacific Buffet were extremely courteous throughout the meal, all operations appeared well organized and professional. They really made my crossing pleasurable."
- Customer tweeted: "Shout out to the brave @BCFerries crew that rescued the crew of a sinking boat near Moresby Island last night... the same route I take to work each day. Weather was awful. That took serious guts."

*Complaints = "bad" or "poor" rating accompanied by a comment

**Excludes comments classified as General and comments with no rating provided

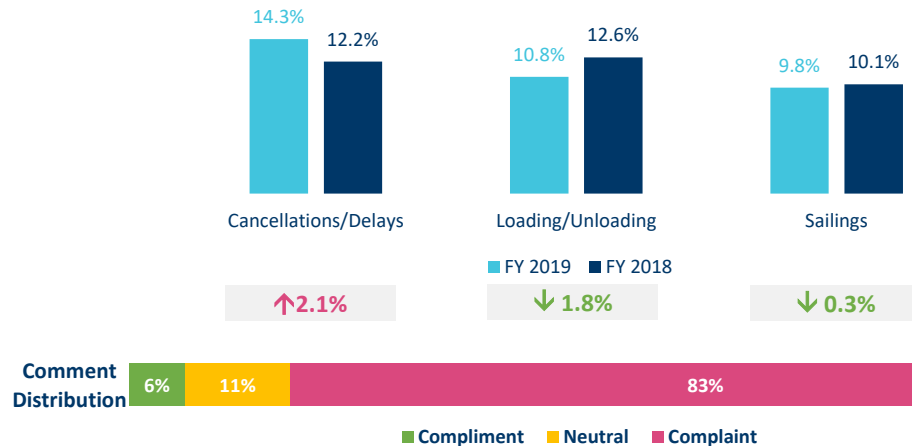
Regional Comments Sunshine Coast:



16% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=1513)*	% of Comments (n=1807)*	Complaints (n=1375)*	% of Comments (n=1731)*
1	Cancellations/Delays	258	14.3%	211	12.2%
2	Loading/Unloading	195	10.8%	218	12.6%
3	Sailings	177	9.8%	175	10.1%

'Sunshine Coast' Complaints as a % Of All 'Sunshine Coast' Comments**



*Complaints = "bad" or "poor" rating accompanied by a comment

**Excludes comments classified as General and comments with no rating provided

Sample Customer Comments

Complaints (1513)

- Customer wrote: "Horseshoe Bay-Langdale, yet again, late partly because ramp needed to be adjusted. I know this issue is related to inattentive performance; I commute daily. I likely have lost about 20-30 hours of my life this year waiting for ferries. VERY Poor performance since summer."
- Customer wrote: "Powell River ferry cancelled sailings on Monday and we had to travel for eight extra hours and take three ferries instead of one to get home. We also had to drive 226 km more than planned. We would like to be compensated for the following expenses: \$40 gas, \$127 extra ferry cost, and \$167 for eight hours of our time."
- Customer called to request a refund for Saltery Bay-Earls Cove fares due to *Queen of Surrey* docking incident. He's from Powell River and had planned to travel Langdale-Horseshoe Bay, however, he adjusted plans and travelled Powell River-Comox and then Departure Bay-Horseshoe Bay.
- Customer wrote: "I recently took a ferry to Langdale from Horseshoe Bay, and we were loaded onto deck four. This required us to 'leave' our vehicle which we didn't want to do because we have two dogs and a newborn. We were asked to leave the car and go to the dog area which made me feel very stressed. I would like to continue travelling on BC Ferries, but if I am forced to leave my car and go through the stress, it's not worth it. There has to be a way to ensure those who would like to stay in their cars with pets can do so by being loaded on the upper deck."

Compliments (102)

- Customer wrote to thank the *Island Sky* crew and staff at Saltery Bay terminal for their exceptional customer service. "Please pass on our thanks to the attendant who arranged two luggage trolleys for a choir of 40 from Poland. We had had a stressful day, with things not going as planned, and your help really made a huge difference. Thank you!"
- Customer called to commend the kindness of a Horseshoe Bay employee who took the time out of her day to drive the customer to the terminal when the bus broke down. She wanted to say thank you as she would have missed the sailing otherwise.

7

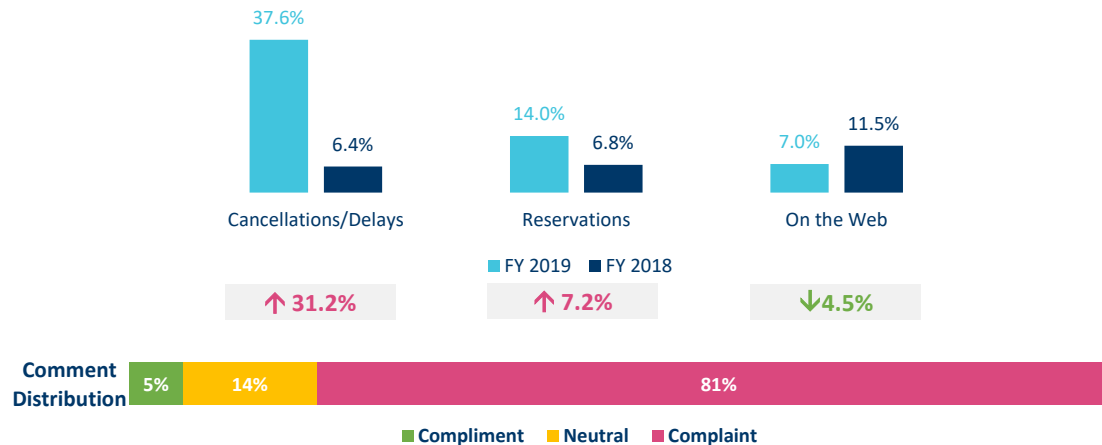
Regional Comments Mid & North Coast:



8% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=702)*	% of Comments (n=866)*	Complaints (n=166)*	% of Comments (n=234)*
1	Cancellations/Delays	326	37.6%	15	6.4%
2	Reservations	121	14.0%	16	6.8%
3	On the Web	61	7.0%	27	11.5%

'Mid & North Coast' Complaints as a % Of All 'Mid & North Coast' Comments**



Sample Customer Comments

Complaints (702)

- Customer wrote: "Due to the ferry schedule disruption, I was forced to take a float plane from Masset, BC to Prince Rupert, BC for an important medical test. I had a TAP form for the ferry; however, I was only able to use it on my return to Haida Gwaii. This test was needed to ensure that I was safe to continue my chemotherapy treatment. I had other important appointments in Terrace, BC as well and had to cancel them."
- Customer called to request compensation due to the cancellation of his sailing on the *Northern Sea Wolf*. He had booked a hotel in Williams Lake that he was not able to use and wanted to be reimbursed for the cost.
- Customer was unable to make a vehicle reservation for travel from Prince Rupert to Skidegate. He decided to travel standby but was not loaded due to traffic volume, and travelled as a foot passenger instead. He made arrangements to have his vehicle hosted on the next available sailing and was not pleased to learn this would be weeks away from his travel date.
- Customer wrote: "After spending two or three hours on your website to book a ticket from Prince Rupert to Port Hardy, I still hadn't found my way through and couldn't make the reservation. It's time you make a new website but don't ask the customers to help. We are not computer engineers. Fed up with these companies that are not able to design a proper website or app and ask the customers to help. NO!"

Compliments (47)

- Customer wrote: "I am so thrilled that BC Ferries will soon have direct service from Port Hardy to Bella Coola. I have previously travelled via BC Ferries to Vancouver Island and found the service to be excellent. After our time in Bella Coola, we plan to go via BC Ferries to Prince Rupert. Is there a ferry that goes from Bella Coola to Prince Rupert? We are planning on travelling between August and September. Thanking you again for the tremendous service!"

8

*Complaints = "bad" or "poor" rating accompanied by a comment

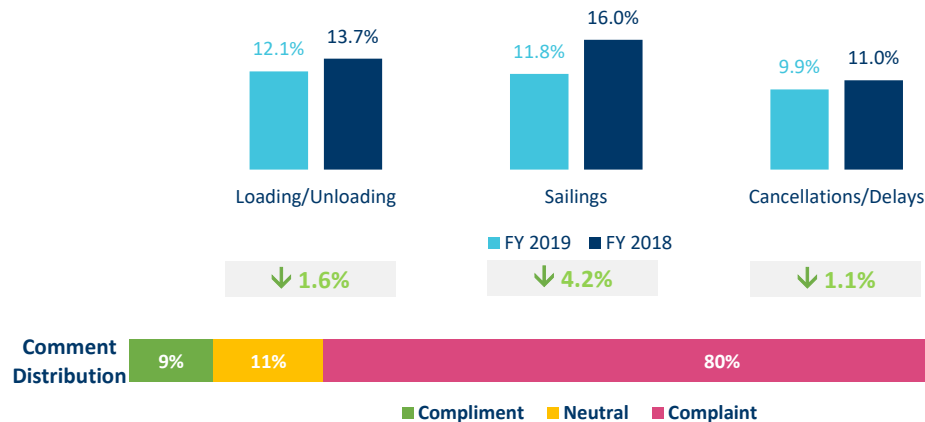
**Excludes comments classified as General and comments with no rating provided

Regional Comments Northern Gulf Islands:

3% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=245)*	% of Comments (n=314)*	Complaints (n=248)*	% of Comments (n=300)*
1	Loading/Unloading	38	12.1%	41	13.7%
2	Sailings	37	11.8%	48	16.0%
3	Cancellations/Delays	31	9.9%	33	11.0%

'Northern Gulf' Complaints as a % Of All 'Northern Gulf' Comments**



Sample Customer Comments

Complaints (245)

- Customer wrote: "I have lived on Denman Island for 40 years and have never experienced such poor ferry service. The cable ferry was supposed to be cheaper to run. Why does it not shuttle more often? It leaves up to 16 cars at times and stays on schedule. Also, the new loading protocol, where the sailing is loaded early, has become a problem because people speed to get on the ferry. The green light hysteria sets in and there is no traffic calmer person to direct them to slow down or tell them where to go. Total chaos."
- Customer wrote: "The Campbell River-Quadra Island ferry has been providing shuttle service when ferries are busy. They are not sending out service announcements to notify customers. This lack of public notification is ridiculous and causes scheduling errors for people living on Quadra Island. This is the second time they have provided shuttle service without sending a Service Notice. This is not fair and can cause cancellation fees and/or missed appointment fees for people expecting ferries to be on the regular schedule."
- Customer wrote: "Why is the Quadra Island ferry often late in the mornings? This is when we need to get to work and appointments. Have you checked the logs to see how often this happens?"

Compliments (27)

- Customer wrote: "Shout out to the lovely woman taking tickets at Gravelly Bay this morning. Such a great feeling having someone so kind and full of positivity greeting us with a warm smile while explaining why there are waits and talking everyone through the early morning line-ups. Also a shout out to all the ferry workers in general. Summer lines are daunting and exhausting for those travelling to and fro, and sometimes it's easy to forget that these hardworking humans are working in the scorching sun for 12 hours a day - just wanted to voice my gratitude."

*Complaints = "bad" or "poor" rating accompanied by a comment

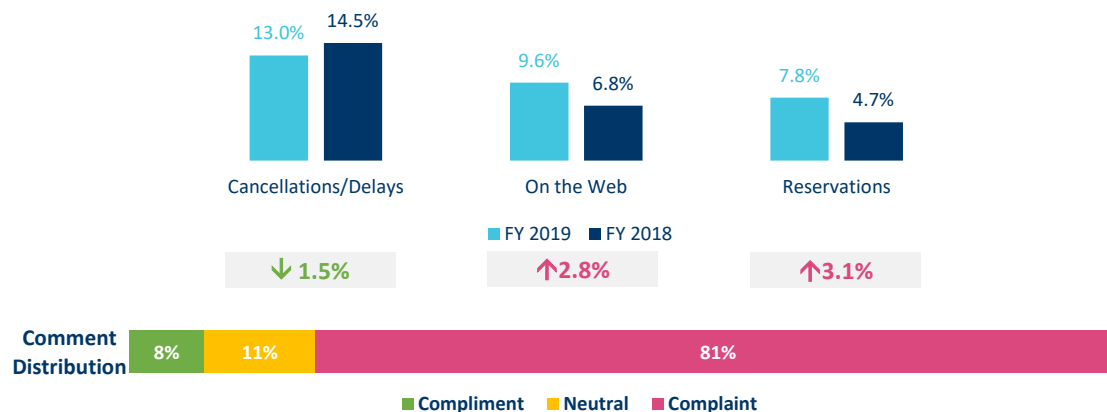
**Excludes comments classified as General and comments with no rating provided

Regional Comments Southern Gulf Islands:

16% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=1402)*	% of Comments (n=1727)*	Complaints (n=1056)*	% of Comments (n=1373)*
1	Cancellations/Delays	224	13.0%	199	14.5%
2	On the Web	166	9.6%	93	6.8%
3	Reservations	134	7.8%	65	4.7%

'Southern Gulf' Complaints as a % Of All 'Southern Gulf' Comments**



Sample Customer Comments

Complaints (1402)

- Customer wrote: "This is the third time this week that the new schedule you have set for the Gulf Islands has been foundered by the *Queen of Cumberland*. You are either overestimating this vessel's capacity, or you're generally not very realistic about your scheduling."
- Customer wrote: "I am currently sitting in line at the Mill Bay ferry and the 5:20 pm ferry was very late and the 6:30 pm has been cancelled with no notice or status updates on your website. Now we are stranded with no way to return up the icy hill and now the Malahat is closed. Your company's disregard for the well-being of the passengers also stranded in the roughly 80 car lineup is appalling. Why would there not be alternatives to cancelling the only way back to Victoria from up island?"
- Customer wrote: "This website is awful. It is not responsive or mobile friendly and loads incredibly slow. Why are the fares not displayed on the schedules page? Why are the fares in a PDF? Why is all of the important information hidden in sub-menus? It desperately needs an upgrade. I would estimate that well over 60 per cent of your traffic is from mobile, and the mobile experience is terrible."
- Customer wrote: "I frequently travel from Tsawwassen to Galiano Island as a foot passenger. Since the new Salish ferries came into service, foot passenger reservations seem almost mandatory. However, while the agents are excellent, lately the wait time for a telephone reservation is often up to an hour. When do you anticipate putting foot passenger reservations online?"

Compliments (131)

- Customer wrote: "The ticketing agent at Long Harbor was exceptional. She was very pleasant and efficient with processing many anxious drivers who were walking to the booth to confirm their reservations. She's a good one!"

*Complaints = "bad" or "poor" rating accompanied by a comment

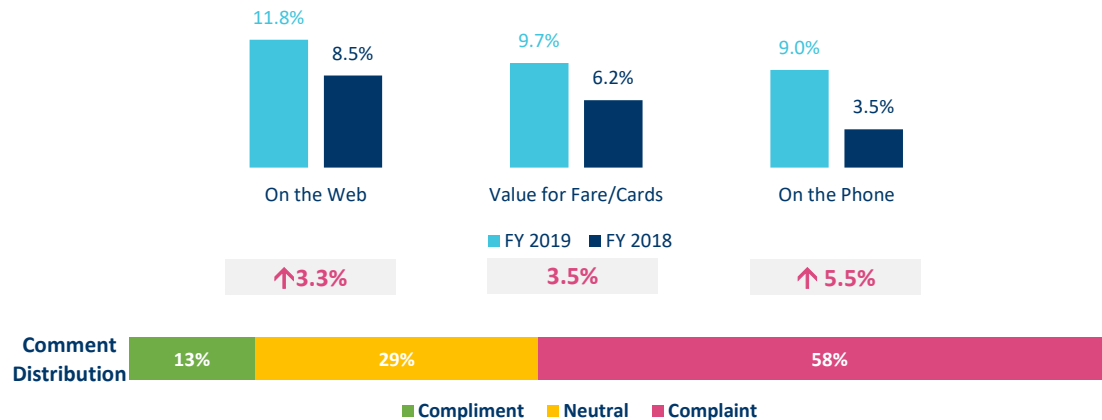
**Excludes comments classified as General and comments with no rating provided

Regional Comments General (No Route Specified):

11% of Total System Wide Comments Received

#	Complaint	FY 2019		FY 2018	
		Complaints (n=735)*	% of Comments (n=1252)*	Complaints (n=653)*	% of Comments (n=1494)*
1	On the Web	148	11.8%	127	8.5%
2	Value for Fare/Cards	121	9.7%	93	6.2%
3	On the Phone	113	9.0%	53	3.5%

'General' Complaints as a % Of All 'General' Comments**



*Complaints = "bad" or "poor" rating accompanied by a comment

**Excludes comments classified as General and comments with no rating provided

Sample Customer Comments

Complaints (735)

- Customer wrote: "It would really help if Service Notices showed the departure times impacted. Very hard to reference by vessel name to see if affected."
- Customer wrote: "I just had a terrible experience with your website. Why don't you have an obvious and easy access button showing the expected arrival time of whatever is the current ferry sailing? Also, why was it so difficult for me to find your e-mail address to write this message? I had to paste it into my browser from your website that does not work."
- Customer called to express concerns about the overlength per-foot rate. The customer feels that the fare for overlength vehicles is too high and that any vehicle over 20 feet in length should pay a lower per-foot rate for the extra footage.
- Customer called regarding finding the fares for routes on the website and found the process to be very complicated. The customer suggested that with the new website, the fares should be located on the specific schedule pages.
- Customer called to make a booking for his business and was unhappy with the call wait times. He said that being on hold for 30 minutes on a weekend, and longer during the week, is unacceptable, especially when customers are trying to run a business.

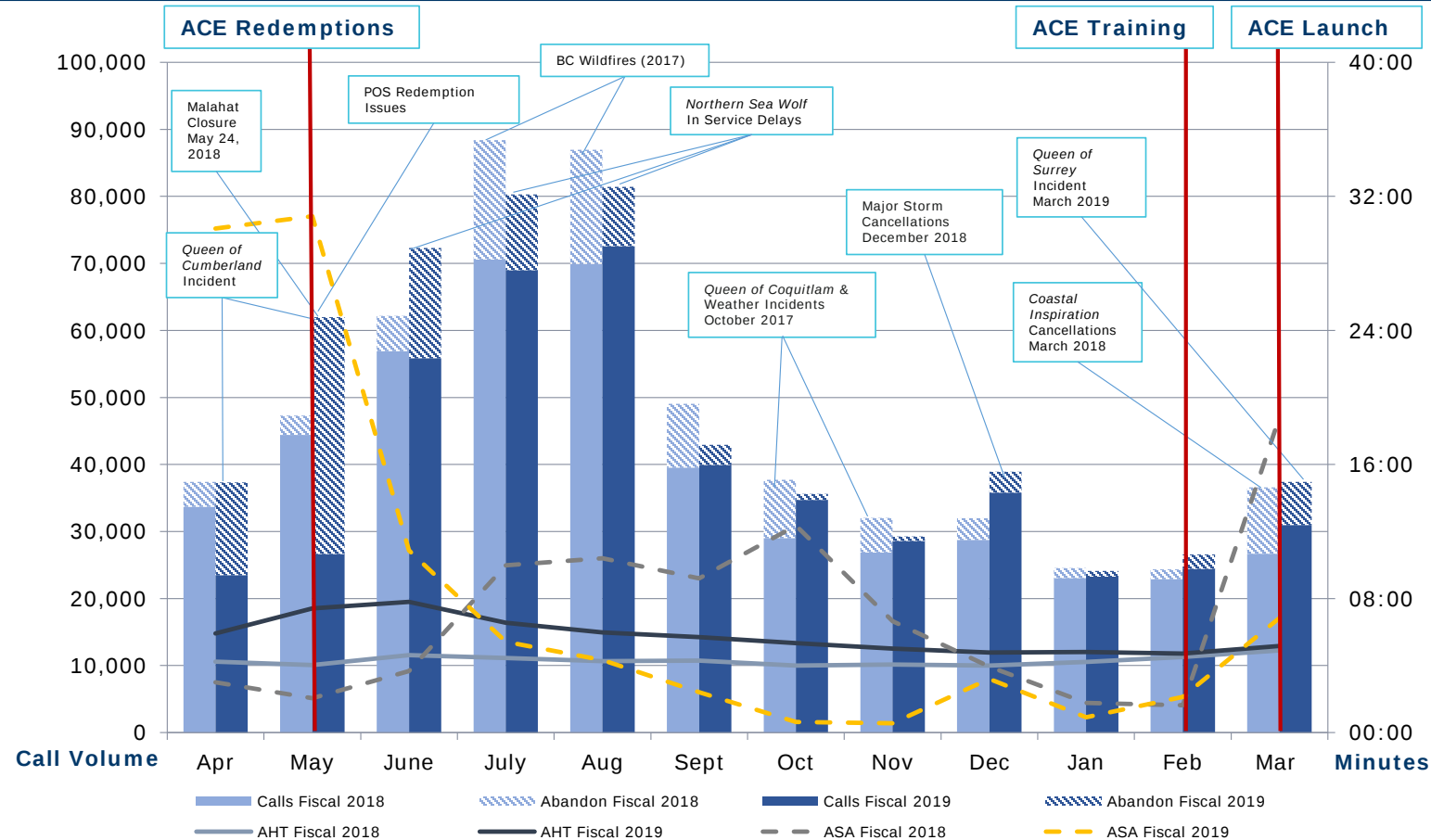
Compliments (159)

- Customer wrote: "Your Chief Steward on the 11:00 am sailing today went out of her way to help me resolve a billing issue. She is a credit to her profession and your organization."
- Customer wrote: "Amazing service and work ethic from your front-line staff on board in the cafeteria! I was very impressed with how quickly and calmly they were dealing with a busy sailing and supper rush."

Call Volumes & First Call Resolution



CSC - Volumes

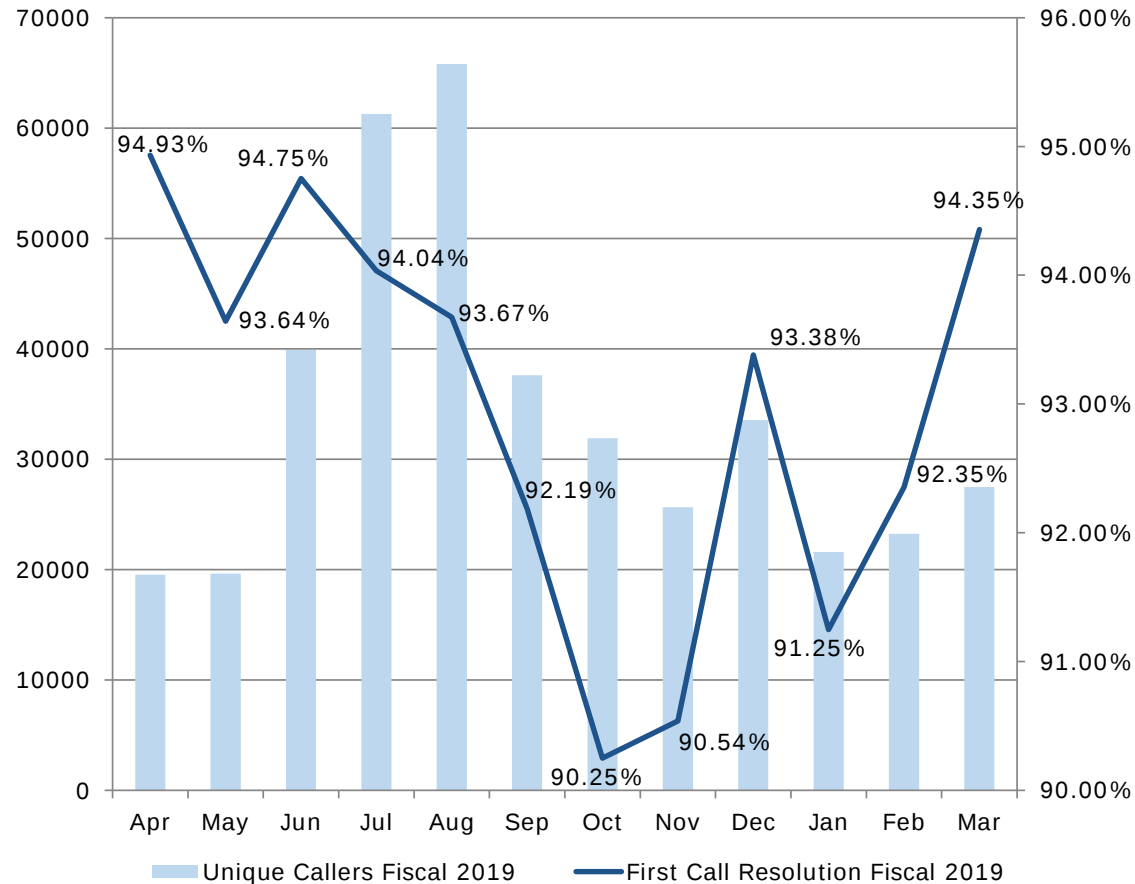


In addition to written customer feedback received through BC Ferries' Customer Relations department, customer questions and concerns are handled directly over the phone and social media through the Customer Service Centre.

The Customer Service Centre handled 465,231 calls in Fiscal 2019 as compared to 472,464 during Fiscal 2018.

The average speed of answer (ASA), abandon rate and average call handle time (AHT) improved significantly in Q3 and Q4 Fiscal 2019. The AHT remains higher than previous years, due to an unexpected increase in booking process time with deployment of new systems.

First Call Resolution



BC Ferries tracks the rate at which customers call back within the same day. This data has allowed BC Ferries to get a picture of how many customers received 'First Call Resolution'; in other words, how many customers had their questions resolved by calling BC Ferries only once during the day:

- Data for Fiscal 2019 shows that, on average, 93 per cent of individual customers have their concerns resolved during their first call
- Approximately 5.5 per cent of customers (primarily commercial) who call repeatedly in one day drive roughly 20 per cent of the total call volume

First Call Resolution recovered in Q4 from the slight dip seen in Q3 as the fall new hire class of Customer Service Centre agents completed their training and became proficient in handling calls.

Customer Satisfaction Tracking Full Year Waves 1, 2 and 3, 2018



Customer Satisfaction Tracking



Survey Methodology

Customer Satisfaction Tracking (CST) is an intercept survey conducted on board vessels annually in three waves – June, August and November - on the following routes: Route 1 (Tsawwassen-Swartz Bay), Route 2 (Horseshoe Bay-Departure Bay), Route 3 (Horseshoe Bay-Langdale), Route 30 (Tsawwassen-Duke Point), Route 4 (Swartz Bay-Fulford Harbour), Route 5 (Swartz Bay-Southern Gulf Islands), Route 9 (Tsawwassen-Southern Gulf Islands) and Route 19 (Nanaimo-Gabriola Island).

In June 2018, five routes were added to the 2018 satisfaction tracking survey:

- Route 8 (Bowen Island-Horseshoe Bay)
- Route 12 (Mill Bay-Brentwood Bay)
- Route 17 (Comox-Powell River)
- Route 18 (Powell River-Texada Island)
- Route 23 (Campbell River-Quathiaski Cove)

Data sampling, validation and weighing is statistically relevant to passenger distribution. The surveys are conducted by interview with every fifth passenger (both foot and vehicle passengers). All areas of the vessel are covered (except closed lower vehicle decks). Phase 1 of the survey data collection is conducted in person on board. Key passenger data is collected in this stage. Phase 2 involves customers completing a self-administered survey, post travel, regarding their experience.

Summary

A total of 88 per cent of passengers in 2018 reported to be satisfied overall with their experience travelling on BC Ferries, resulting in an average score of 4.22 out of 5. This represents an increase from the 4.16 average score, 87 per cent satisfied reported in 2017. The overall score is calculated as a passenger count weighted average. Due to the volume of passengers on the Major Routes, their scores heavily influence the overall score.

Key drivers contributing to 2018, all wave scores:

Overall Value for Money of Fares, +0.20

The average satisfaction score for the *Overall Value for Money of Fares* stands at 3.31, increasing for the fourth year in a row and representing an all-time high. The implementation of a fare freeze, the Sunrise/Sunset fare promotion on Major Routes, fare reductions on Minor Routes, and the reinstatement of free travel for seniors are likely contributors.

Ferry Departing on Time, +0.13

Satisfaction scores continue to be relatively stable for most routes surveyed. Route 3 has significantly improved from 3.04 in 2017 to 3.55 this year. Scores for Southern Gulf Island Routes 5/9 have rebounded following a decrease last year, improving from 3.60 in 2017 to 3.82 this year. Modified sailing schedules, in addition to fare reductions and promotions, have likely contributed to the improved scores for these routes.

Decreases in Satisfaction in 2018

Ratings for phone contact with BC Ferries in 2018 had an all-time low registered for *Usefulness of BC Ferries Phone Service* (down from 3.61 in 2017 to 3.36 in 2018), and for *Ease of using the Automated Phone Service* (down from 3.46 to 3.15). From March to May, technical difficulties resulting from the introduction of a new reservation system, multiple operational incidents and the closure of the Malahat Highway are likely to have impacted these scores with longer than normal call wait times for customers.

Customer Satisfaction Tracking

All Waves 2018



Overall Customer Satisfaction

Overall Customer Satisfaction	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	4.11	4.14	4.18	4.16	4.22	+0.06
Route 1	4.29	4.27	4.29	4.26	4.32	+0.06
Route 2	4.07	4.12	4.16	4.21	4.13	-0.08
Route 30	4.16	4.19	4.19	4.14	4.21	+0.07
Route 3	3.91	3.88	3.96	3.92	4.18	+0.26
Route 4	4.19	4.13	4.20	4.24	4.28	+0.04
Route 19	3.46	3.98	4.14	3.99	4.03	+0.04
Route 5/9	4.08	4.15	4.24	4.14	4.24	+0.10
Route 8					4.22	
Route 12					4.47	
Route 17					4.19	
Route 18					4.19	
Route 23					4.28	
Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.						
Note: Starting with the survey completed in June 2018, five routes (8, 12, 17, 18 and 23) have been added to the mix of routes on which customers are surveyed; only the customers on the Major Routes (1, 2, 3, 30), the Southern Gulf Islands routes (4, 5, and 9) and Nanaimo-Gabriola route (19) were historically surveyed. Excluding the five additional routes, the Customer Satisfaction score would still be at 4.22 as the score is calculated as a passenger count weighted average; this increase from prior surveys is primarily driven by improvements on satisfaction scores recorded on the Major Routes (1, 2, 3 and 30).						

- Overall Customer Satisfaction for BC Ferries increased by +0.06 in 2018, up from 4.16 in 2017 to 4.22 in 2018.
- Value for Money of Fares, Ferry Departing on Time and Overall Experience on Board were the measures that contributed most to the overall increase in customer satisfaction score.
- 4.22 is the highest score for Overall Customer Satisfaction – All Routes, since 2010.

Customer Satisfaction Tracking

All Waves 2018



Customer Satisfaction – *Value for Money of Fares*

<i>Value for Money of Fares</i>	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	2.76	2.86	3.03	3.11	3.31	+0.20
Route 1	2.92	3.05	3.12	3.22	3.32	+0.10
Route 2	2.77	2.72	2.94	3.09	3.17	+0.08
Route 30	2.67	2.79	2.87	3.01	3.09	+0.08
Route 3	2.64	2.69	3.10	2.98	3.45	+0.47
Route 4	2.80	2.84	3.00	3.09	3.50	+0.41
Route 19	2.32	2.66	3.07	3.04	3.40	+0.36
Route 5/9	2.70	2.96	3.16	3.11	3.55	+0.44
Route 8					3.68	
Route 12					3.92	
Route 17					3.10	
Route 18					3.46	
Route 23					3.38	
Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.						
Note: In June 2018, five routes (8, 12, 17, 18 and 23) were added to the 2018 satisfaction tracking survey.						

- In April 2018, the implementation of a fare freeze on Major Routes, fare reductions on Minor Routes and the reinstatement of free travel for BC seniors likely contributed to the increase in satisfaction for *Value for Money of Fares* across all routes in 2018.
- Satisfaction for *Overall Value for Money of Fares* on all routes was highest in Wave 1 (3.36, June) and Wave 2 (3.32, August) suggesting that pricing promotions over the summer contributed to an increase in satisfaction.
- Satisfaction on Minor Routes (3, 4, 19, 5 and 9) increased the most following fare reductions on these routes.
- 3.31 represents an all time high score for *Value for Money of Fares – All Routes*.

Customer Satisfaction Tracking

All Waves 2018



Customer Satisfaction – *Ferry Departing on Time*

<i>Ferry Departing on Time</i>	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	3.73	3.82	3.80	3.73	3.86	+0.13
Route 1	4.05	4.07	4.06	4.01	4.17	+0.16
Route 2	3.76	3.81	3.85	3.81	3.59	-0.22
Route 30	4.04	4.07	3.94	3.82	4.04	+0.22
Route 3	3.11	3.14	3.10	3.04	3.55	+0.51
Route 4	3.97	3.89	3.93	4.07	4.02	-0.05
Route 19	2.69	3.78	3.75	3.43	3.33	-0.10
Route 5/9	3.54	3.64	3.83	3.60	3.82	+0.22
Route 8					3.44	
Route 12					4.09	
Route 17					3.98	
Route 18					3.68	
Route 23					3.93	

Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.

Note: In June 2018, five routes (8, 12, 17, 18 and 23) were added to the 2018 satisfaction tracking survey.

- Satisfaction scores for *Ferry Departing on Time* increased from 3.73 to 3.86 in 2018.
- Additional sailings scheduled over holiday weekends and adjustments made to schedules on Routes 3, 5 and 9 may have contributed to the increase in satisfaction for this measure.
- Satisfaction related to the *Ability to Connect with other Sailings* was also up the majority of these routes, likely due to the same factors.
- Route 19 experienced a sharp decrease in satisfaction starting in 2017 as a result of service disruptions caused by bad weather and engine issues with the *Bowen Queen* which replaced the *Quinsam* while it was in refit. Satisfaction has not yet returned to levels seen in previous years due to increases in traffic resulting in a higher number of sailings delays during peak travel times.

Customer Satisfaction Tracking

All Waves 2018



Customer Satisfaction – Overall Experience at the Terminal

<i>Overall Experience at the Terminal</i>	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	4.03	4.07	4.08	4.07	4.05	-0.02
Route 1	4.11	4.14	4.12	4.15	4.13	-0.02
Route 2	4.04	4.07	4.10	4.08	4.04	-0.04
Route 30	4.09	4.11	4.13	4.10	4.13	+0.03
Route 3	3.94	3.90	3.94	3.86	3.89	+0.03
Route 4	4.01	4.05	3.95	4.08	4.03	-0.05
Route 19	3.66	3.96	3.95	3.97	3.85	-0.12
Route 5/9	4.04	4.12	4.16	4.09	4.12	+0.03
Route 8					3.88	
Route 12					4.02	
Route 17					4.05	
Route 18					4.03	
Route 23					4.22	
Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.						
Note: In June 2018, five routes (8, 12, 17, 18 and 23) were added to the 2018 satisfaction tracking survey.						

- Customer satisfaction related to the *Overall Experience at the Terminal* was down slightly compared to the same period last year (-0.02).
- Satisfaction for this measure decreased the most on Route 19, down from 3.97 in 2017 to 3.85 in 2018. This decrease in satisfaction was likely due to the long lines of traffic forming on the single lane road that leads to the Descanso Bay terminal during busy sailing periods.

Customer Satisfaction Tracking

All Waves 2018



Customer Satisfaction – Overall Experience on Board

Overall Experience on Board	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	4.07	4.10	4.14	4.12	4.16	+0.04
Route 1	4.15	4.17	4.21	4.19	4.22	+0.03
Route 2	4.09	4.06	4.15	4.12	4.13	+0.01
Route 30	4.12	4.12	4.17	4.15	4.14	-0.01
Route 3	3.99	4.02	4.01	4.00	4.11	+0.11
Route 4	4.03	4.01	4.02	4.06	4.14	+0.08
Route 19	3.71	3.96	4.07	4.07	4.01	-0.06
Route 5/9	4.02	4.17	4.16	4.06	4.17	+0.11
Route 8					4.12	
Route 12					4.33	
Route 17					4.12	
Route 18					4.10	
Route 23					4.22	
Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.						
Note: In June 2018, five routes (8, 12, 17, 18 and 23) were added to the 2018 satisfaction tracking survey.						

- Customer satisfaction for *Overall Experience on Board* in 2018 increased by +0.04 compared to 2017 score.
- Improvements in satisfaction scores for this measure were on Routes 1, 2, 3, 4, 5 and 9.
- The introduction of the Salish Class vessels continue to result in increased satisfaction among Gulf Island passengers with issues related to passenger deck doors and limited food offerings resolved in 2018.
- On Route 3, there was an increase in satisfaction from 4.00 in 2017 to 4.11 in 2018, likely linked to the significant increase in satisfaction for the measure of *Ferry Departing on Time* (+0.51). Modifications made to the sailing schedule following public consultation seem to have been positively received.

Customer Satisfaction Tracking

All Waves 2018



Customer Satisfaction – Usefulness of BC Ferries Phone Service

<i>Usefulness of BC Ferries Phone Service</i>	2014	2015	2016	2017	2018	Year over Year
ALL BC FERRIES	3.56	3.60	3.61	3.61	3.36	-0.25
Route 1	3.73	3.89	3.85	3.73	3.63	-0.10
Route 2	3.51	3.55	3.47	3.67	3.40	-0.27
Route 30	3.53	3.46	3.67	3.62	3.19	-0.43
Route 3	3.34	3.09	3.29	3.32	2.87	-0.45
Route 4	3.55	3.56	3.63	3.47	3.43	-0.04
Route 19	2.70	3.19	3.25	3.28	3.51	+0.23
Route 5/9	3.86	3.89	3.95	3.75	3.30	-0.45
Route 8					3.04	
Route 12					3.57	
Route 17					3.18	
Route 18					3.25	
Route 23					2.85	
Average satisfaction scores out of 5 where 1 = very dissatisfied and 5 = very satisfied.						
Note: In June 2018, five routes (8, 12, 17, 18 and 23) were added to the 2018 satisfaction tracking survey.						

- Customer satisfaction for *Usefulness of BC Ferries Phone Service* decreased by -0.25 in 2018.
- Ratings for phone contact with BC Ferries had all-time lows registered in 2018 for each of *Usefulness of BC Ferries Phone Service* and for *Ease of using the Automated Phone Service* (3.46 in 2017 to 3.15 in 2018). This decrease in satisfaction registered most during the Wave 1 intercept surveys in June when there were technical issues with the new reservation system that had been implemented.
- Technical difficulties resulting from the introduction of the new reservation system BC Ferries implemented in March, with system resolution only occurring near the end of July, are likely to have had an impact.

Comment Summary and Actions Taken



Comment Summary and Actions Taken



Cancellations / Delays:

Operational cancellations and delays can be caused by traffic volumes, tide levels, mechanical issues or adverse weather conditions. Other impacts to service include medical emergencies, marine emergencies, crewing matters and situations occurring during the loading/unloading process (stalled vehicle, lost key, driver not in vehicle, vehicle dead battery, etc.).

Service Interruptions

A series of service interruptions throughout the year resulted in significant feedback and compensation requests related to cancellations and delays. Notable interruptions include: the *Queen of Cumberland*'s removal from service on April 18, 2018 due to an incident involving a rescue boat davit; the in-service delay of the *Northern Sea Wolf* scheduled to provide direct summer service between Port Hardy-Bella Coola; the *Salish Raven*'s mechanical issues on October 17, 2018 when the aft thruster unexpectedly shut down while operating on the Comox-Powell River route; winter storms causing the cancellation of 330 sailings during the month of December 2018, as well as cancellations on a number of routes on February 9 and 10, 2019; the *Salish Eagle*'s mechanical issues on February 18, 2019, causing cancellations on the Comox-Powell River route; and a docking incident with the *Queen of Surrey* on March 26, 2019, which caused the removal of the vessel from service until April 27, 2019.

Actions taken:

- Each incident is reviewed and managed on a case by case basis to ensure the needs of the specific communities and customers are taken into consideration. The primary focus is always on the restoration of full service as soon as it is safe to do so, to minimize the impact to customers.
- Sailing cancellations are broadcast via BC Ferries' website, Twitter and Service Notices. During cancellation events, a 'Travel Advisory' page and when appropriate the 'All Routes Status' page is added to BC Ferries' website home page to provide easy access to current sailing information.
- When the vessel is operating ten minutes or more behind schedule, the check-in time for reserved customers is extended by ten minutes. This flexible check-in is offered only on the Major Routes (Tsawwassen-Duke Point, Tsawwassen-Swartz Bay, Departure Bay-Horseshoe Bay and Langdale-Horseshoe Bay).
- Where applicable, water taxi service and/or alternate routing is provided.
- Requests for compensation and reimbursement of additional costs are considered on a case by case basis.

Vessels

Plans to replace aging vessels in order to meet increased traffic demand and provide safe, efficient, reliable service for future generations are under way. While regular vessel upgrades and improvements enable BC Ferries' vessels to operate reliably until the end of their service life, the Vessel Replacement Program is in place to manage the construction, procurement, and/or major upgrades of ships for BC Ferries' fleet.

Actions taken:

- Focus is on vessel standardization to increase efficiency, seamless substitution during refits, repairs, and unexpected challenges. Standardization will provide a more consistent travel experience for customers and will reduce logistical, operational, training and maintenance costs.
- Two new Island Class hybrid diesel electric vessels are under construction and expected to enter service in the Northern Gulf Islands in 2020 on the Powell River-Texada Island route and the Port McNeill-Alert Bay-Sointula route.

Comment Summary and Actions Taken



Cancellations / Delays (cont'd):

Vessels (cont'd)

Actions taken (cont'd):

- A Request for Proposal (RFP) is expected to be released late summer 2019, which will allow BC Ferries to evaluate offers to build the new major vessels. Four of the vessels will replace the *Queen of Alberni*, *Queen of New Westminster*, *Queen of Cowichan*, and *Queen of Coquitlam* while the fifth vessel will be an added vessel to meet growing demand and build resiliency into the fleet.
- An RFP was issued in November 2018 is for the construction of one vessel, identical to BC Ferries' Salish Class vessels, with a capacity of 600 passengers and crew and approximately 138 vehicles.
- Another RFP was issued in December 2018 for the construction of four 81-metre Island Class ferries, each with a capacity of up to 450 passengers and crew and approximately 47 vehicles. These new vessels will serve Campbell River-Quadra Island (two Island Class ferries), Nanaimo Harbour-Gabriola Island (two Island Class ferries) and Swartz Bay-Southern Gulf Islands (Salish Class ferry).
- The *Spirit of British Columbia* and the *Sprit of Vancouver Island*, BC Ferries' two largest vessels, returned to service June 6, 2018 and April 18, 2019 respectively, following their mid-life upgrades which included major improvements to customer amenities and conversion to dual-fuel.
- The *Northern Sea Wolf* has undergone extensive renovations and entered service on the Central Coast route May 18, 2019, providing seasonal direct service between Bella Coola-Port Hardy beginning June 3, 2019. Customers whose travel plans were affected by the vessel's delayed start date were accommodated on other sailings as possible. Those who were unable to travel on alternate sailings in the summer of 2018 were offered complimentary future travel on the *Northern Sea Wolf*. Customers who incurred extra expenses as a result of the cancellations in summer 2018 were asked to submit receipts for reimbursement on a case by case basis.

Frequency of Sailings and Schedule Adjustments

Traffic results continue to trend upward with a 1.9 per cent increase in vehicle travel and a 1.2 per cent increase in passenger travel during Fiscal 2019 compared to Fiscal 2018. These increases represent the most vehicles ever carried in one single year and the second highest number of passengers.

Actions taken:

- There were 79,959 round trip sailings provided during Fiscal 2019, 3,823.5 more round trips than required under the Coastal Ferry Services Contract and 877 more round trips compared to the prior year.
- In response to requests from the local Ferry Advisory Committee and increasing peak season demand on the morning service between Texada Island-Powell River, daily sailings for the summer period beginning June 27 through September 3, 2018 were added. These changes brought schedule consistency to morning sailing times seven days per week, added capacity on weekend mornings and weekday afternoons, and moved the 10:40 am departure from Powell River twenty minutes earlier to 10:20 am, to simplify the schedule and better meet the needs of customers.

Comment Summary and Actions Taken



Cancellations / Delays (cont'd):

Frequency of Sailings and Schedule Adjustments (cont'd)

- To maintain operational readiness and crew clearances, the *Quinitsa* provided extra service as available during peak traffic periods on two routes: Buckley Bay-Denman Island West and Swartz Bay-Fulford Harbour, depending on where the vessel was tied up. This strategy ensured crew certifications were current and staff were available as the *Quinitsa* was the only relief vessel for the Southern Gulf Islands before the planned move to replace the retiring *Howe Sound Queen* on the Vesuvius-Crofton route in spring 2019.
- To assist with higher than typical traffic volumes on the Vesuvius-Crofton route, sailings were added in the mornings of Monday, Thursday, Friday and Saturday at the end of June 2018. Dangerous Goods sailings were changed on Monday, Wednesday, and Thursdays to extend the schedule over the operational day.
- On February 22, 2019, the Province announced plans to increase service levels on ten ferry routes, adding 2,700 round trip sailings annually. Additional service on the following routes began April 1, 2019: Crofton-Vesuvius, Earls Cove-Salter Bay, Horseshoe Bay-Bowen Island, Port Hardy-Mid Coast-Prince Rupert, Haida Gwaii-Prince Rupert, Powell River-Texada Island, Campbell River-Quadra Island and Quadra Island-Cortes Island. Additional service on Nanaimo Harbour-Gabriola Island began early April 2019 following the completion of a community survey. Additional service is planned for the Alliford-Skidegate route. Arrangements to support these changes are underway.
- The *Island Sky* provided additional round trip sailings at the end of the day as needed from Earls Cove-Salter Bay to assist with moving the volumes of traffic travelling on the Horseshoe Bay-Langdale route.

Value for Fares / Cards:

Value for Money of Fares

Feedback relates to fares as a result of perception of value for fares paid, ticketing errors, questions regarding the BC Ferries Experience™ Card and Assured Loading Card use and policies.

Actions taken:

- On April 1, 2018 fares on the 21 inter-island and Northern routes, as well as the Horseshoe Bay-Langdale route, were reduced by an average of 15 per cent. Fares on the three Metro Vancouver-Vancouver Island routes were held constant. In addition, the BC seniors' discount increased from 50 per cent to 100 per cent for travel Monday through Thursday, excluding statutory holidays, on Major and inter-island routes. BC Ferries Experience™ Card discounted fares were also decreased by 15 per cent. The provincial government and BC Ferries reached an agreement to fund these reductions at a cost of \$43.2 million for Fiscal 2019 and \$58.4 million for Fiscal 2020. BC Ferries contributed \$39 million and the Province contributed the remaining \$59 million.
- Promotions were offered to customers in an effort to shift traffic from peak sailing times and alleviate congestion. During Fiscal 2019, the following promotions were offered:
 - "Spring Savings" (March 15 through April 3, 2018)
 - ❖ Discounted fares on selected sailings for standard under-height vehicles and drivers on Major Routes between Swartz Bay-Tsawwassen, Tsawwassen-Duke Point, Horseshoe Bay-Departure Bay and Horseshoe Bay-Langdale.

Comment Summary and Actions Taken



Value for Fares/Cards: (cont'd)

Value for Money of Fares (cont'd)

Actions taken: (cont'd)

- o "Sunrise and Sunset Savings" (June 1 through September 30, 2018)
 - ❖ Discounted fares on more than 2,100 select sailings for standard under-height vehicles and drivers on Major Routes between Swartz Bay-Tsawwassen, Tsawwassen-Duke Point, Horseshoe Bay-Departure Bay and Horseshoe Bay-Langdale.
- o "Bring it All" (June 1 to September 30, 2018)
 - ❖ Extra length private passenger vehicle discounts applicable to customers travelling with a recreational vehicle longer than 20 feet, offering a 50 per cent discount at \$3.25 per extra foot (regularly \$6.50) on over 1,100 select sailings between Swartz Bay-Tsawwassen and Tsawwassen-Duke Point.
- o "Central Coast September Sale" (September 16 through October 11, 2018)
 - ❖ Savings of up to 40 per cent offered on 19 direct sailings between Port Hardy on northern Vancouver Island and the Mid-Coast town of Bella Coola.
- o "Central Coast Connector – Complimentary" (October 9, 2018 through March 31, 2019)
 - ❖ Complimentary fares offered for travel on board the *Nimkish* as a gesture of good will to customers and the communities impacted by the delayed entry into service of the *Northern Sea Wolf*.
- Discounts are available by using the BC Ferries Experience™ Card on all routes except for Tsawwassen-Swartz Bay, Tsawwassen-Duke Point, Departure Bay-Horseshoe Bay, Port Hardy-Prince Rupert, Port Hardy-Bella Coola, Bella Bella-Bella Coola and Prince Rupert-Haida Gwaii. Fare discount programs have been in place since 1961 for all Gulf Islands, and since 1972 for the Sunshine Coast.
- There has been some confusion about the intent of the the BC Ferries Experience™ Card. Customers would like the option to use the balance of their card to purchase onboard amenities. At this time, the Experience™ Card system is not integrated with onboard point of sale systems.
- BC Ferries is in the process of developing a frequent traveller rewards program that will provide added value to customers and generate incremental revenue by increasing travel frequency and on board spend.
- New fare choices for travel between Tsawwassen-Swartz Bay, Tsawwassen-Duke Point and Horseshoe Bay-Departure Bay will be introduced in Fiscal 2020 and will provide customers with the option to purchase discounted fares in advance at off-peak travel times.

Comment Summary and Actions Taken



Value for Fares/Cards (cont'd):

Fare Errors

Feedback in relation to fare errors during Fiscal 2019 increased by 58 per cent over that for Fiscal 2018 due to an upgraded point of sale system, a new reservation system and terminal ticket agent errors. Errors related to the number and type of passengers, vehicle type and length, and customers being double charged for travel.

Actions taken:

- Customers who report ticketing errors (passenger number and type, vehicle length and type) are asked to submit their receipts for investigation with adjustments made on a case by case basis. Customers are encouraged to check their receipts prior to travel so that details can be verified and errors can be corrected prior to travel.
- Suspected IT issues involving payment systems are reported promptly for investigation. Errors are reported to appropriate departments immediately for resolution.
- Assured Loading Card loading errors can occur at the ticket booth when ticket agents load a new set of ten tickets onto an existing card. Ticketing errors are shared with ticketing supervisors to provide further agent training.

On the Web and Technology:

Website and Technological Communication

Customers continue to express dissatisfaction with BC Ferries' current website and its existing technological limitations. Feedback received during Fiscal 2019 suggests that BC Ferries' customers expect an online system that would allow them to receive timely and reliable communication about revised sailing schedules, Current Conditions and other operational matters prior to and during their travel.

Actions taken:

- Enhanced customer communication with more frequent and with detailed updates through existing channels (website Service Notices, Travel Advisories, social media).
- When BC Ferries' website is replaced it will offer a mobile responsiveness design providing additional online self-serve functionality. User testing has been conducted and overall feedback has been positive. Adjustments have been made based on feedback provided.
- The Digital Signage Project at minor terminals was completed in Fiscal 2019 with signs installed at all the terminals, with the exception of those without connectivity. Each screen displays vessel location, next sailing time, and whether or not the current sailing is on time, delayed or cancelled. The screens are also updated manually to provide information regarding service interruptions or schedule changes on connecting routes.
- BC Ferries is aware that its current onboard Wi-Fi service is not meeting customer expectations. Current service does not provide a quality experience due to the vessels' distance from land and the large number of users trying to consume limited bandwidth. Other modes of transportation, such as airlines and rail, use satellite-based systems which offer a more reliable service but are more costly. In order to improve the customer's travel experience, BC Ferries continues to explore the option of satellite service. This may involve a tiered access system.

Comment Summary and Actions Taken



On the Web and Technology: (cont'd)

Travel Planning and Reservations

Technology issues associated with the introduction of a new reservation system just prior to Q1 Fiscal 2019 led to some customers experiencing difficulty with reserving online and/or redeeming their reservation at the terminal.

Actions taken:

- The new website will provide customers with greater ability to self-serve and book their own reservations, including foot passengers, for travel on the Tsawwassen-Southern Gulf Islands route and the ability to book Northern route travel online. Customers choosing full sailings on the Northern routes will be offered the option of joining the waitlist via the website.

Staff Helpfulness:

Feedback Channels

Customer dissatisfaction can be caused by communication issues, ticketing errors, misunderstandings, inappropriate behaviour by employees, call wait times, long wait times at the terminal and the inability to secure reservations.

Customer service improvements are identified through employee and customer feedback (complaints, compliments and suggestions) received through all comment channels: letters, emails, phone calls, tweets, Facebook posts, Instagram, Customer Satisfaction Tracking (CST) and the online feedback form. During Fiscal 2019, 73 per cent of 'Staff Helpfulness' feedback came from customers travelling on routes serving Vancouver Island-Mainland and the Sunshine Coast specifically.

Actions taken:

- Customer complaints/feedback are reviewed and investigated on a case by case basis, following the Complaints Resolution process.
- Feedback is shared with appropriate management for review.
- Front line staff provide information to help familiarize customers on the process and procedures to avoid future misunderstandings.
- Social media channels and customer emails are monitored and responded to.

Comment Summary and Actions Taken



Staff Helpfulness: (cont'd)

Employee Training

BC Ferries invests significantly in the training and development of its employees to further enhance the customers' travel experience.

Actions taken:

- Employee complaints are shared with the appropriate management team, providing coaching opportunities as needed.
- Compliments are also shared with the individual management team so that employees can be recognized for their efforts.
- It is understood that customers are more likely to share their negative experiences with BC Ferries than their positive ones. BC Ferries is proud once again to report that, due to continued improvements in customer service, the number of staff compliments received for "On the Ship: Staff Helpfulness" exceeded complaints during Fiscal 2019 where 277 compliments were reported versus 149 complaints, and the same for "On the Phone: Agent Helpfulness" where 62 compliments were received versus 52 complaints.

Reservations:

Northern Bookings

Feedback received regarding reservations during Fiscal 2019 was primarily related to the in-service delay of the *Northern Sea Wolf* which was expected to re-introduce a direct route between Port Hardy-Bella Coola starting June 19, 2018. The vessel was delayed due to unanticipated extensive refit work needed to bring it up to BC Ferries' and Transport Canada's standards. Customers expressed frustration over the uncertainty and availability of the Northern route reservations and the impact it had on their travel plans for the 2018 summer season.

Actions Taken:

- Customers whose previously confirmed bookings were cancelled due to the delay of the *Northern Sea Wolf* were contacted, in order of booking and date of travel, to explore the possibility of alternate travel arrangements. Compensation requests for costs incurred by customers associated with cancelled travel plans were considered on a case by case basis.
- Customers who were unable to travel on an alternate sailing in the summer of 2018 were offered complimentary travel on the *Northern Sea Wolf* for the summer of 2019.
- BC Ferries repositioned the *Northern Adventure* to provide service on this Mid-Coast route between September 15 and October 11, 2018.
- An email was sent February 13, 2019 to all reserved and waitlisted customers for travel on the Central Coast (Bella Coola-Port Hardy) route on the *Northern Sea Wolf* beginning June 3, 2019. The email, from President and CEO, Mark Collins, explained the waitlist process and informed customers who were on the waitlist that they would be contacted to confirm their bookings mid-April, once testing of the *Northern Sea Wolf* was complete. Starting April 24, 2019 waitlisted customers were contacted via email and asked to call BC Ferries to confirm their booking and provide payment.

Comment Summary and Actions Taken



Reservations: (cont'd)

Self-Serve and Reservation Allocations

Customers want the option to reserve and make changes to their reservations without having to call and speak with an agent, and they want to know the percentage of allocated space per sailing/vessel.

Actions taken:

- The new website will provide customers the ability to self-serve and book their own foot passenger reservations for travel on the Tsawwassen-Southern Gulf Islands route and the ability to book Northern route travel online, including some amenities. Customers choosing full sailings on the Northern routes will be offered the option of joining the waitlist via the website.
- The percentage of available deck space for reserved traffic varies from 45-75 per cent, depending on the vessel and the sailing. This includes space set aside for commercial vehicles and buses. Customers are asked to reference Current Conditions for same day space availability at this time.

Technical Issues and General

A few technical issues related to the implementation of the new reservation system affected the ability of some customers to successfully self-serve and reserve online. As well, ticket agents encountered technical challenges that prevented them from locating reservations at check-in.

Actions taken:

- Technical issues were identified and reported to BC Ferries' Information Technology team, actioned as priority and quickly resolved.
- Customers were frustrated with the challenges to meet check-in requirements during the more popular travel periods, due to the volume of traffic outside the ticket booths. Increased traffic control was provided at terminals along with RCMP assistance to direct traffic during peak times.

Comment Summary and Actions Taken



General:

Customers submitted 709 General comments related to community issues (289), company information (323) and environment (97).

The following notable actions were taken during Fiscal 2019 in reference to other areas of the business:

- The thru fare pilot program continues for those customers travelling from Departure Bay-Langdale via Horseshoe Bay, or vice versa, where a limited number of spaces are available allowing customers to remain on board rather than disembark at Horseshoe Bay, which requires a turn-around on the highway to re-enter the terminal. Originally introduced in February 2018, the pilot was temporarily halted during peak summer season and re-implemented early September 2018 through December 19, 2018 when it was paused once again to avoid peak holiday season volumes before continuing on January 2, 2019. The pilot has been well received thus far and results are under review.
- BC Ferries conducted a six-month White Spot Breakfast trial on Horseshoe Bay-Departure Bay route vessels beginning May 2, 2018. After analyzing the feedback, it was clear that customers preferred the original BC Ferries' breakfast menu. On October 24, 2018 all Departure Bay-Horseshoe Bay vessels returned to this menu.
- BC Ferries is now accepting debit as a form of payment onboard all vessels following the successful pilot on board the *Spirit of British Columbia* October 17, 2018.
- The Government of Canada introduced the *Cannabis Act* on October 17, 2018, which legalized cannabis in limited quantities and forms. Communication channels, including Media Releases and Social Media, were used to remind customers that BC Ferries offers a smoke-free environment that applies to tobacco, cannabis, and e-cigarettes. Feedback received, in general, was positive about this initiative.
- The Langdale Terminal Redevelopment Plan continued to move forward throughout Fiscal 2019. Project updates are provided to the community regularly through newspaper advertorials and through the 'Project' page on bcferries.com.
- On March 19, 2019, BC Ferries released the Swartz Bay Terminal Development Plan, which outlines a long-term vision for the terminal's future and a phased approach for implementing changes.
- The Transport Canada regulation prohibiting customers from remaining in their vehicle during the voyage on closed vehicle decks has resulted in customers continuing to have expectations related to how they are loaded, where they are placed on the vehicle deck, and how they are discharged; in order of vehicle arrival at the terminal is often a stated preference. When customers are not loaded as expected, they perceive it as a customer service issue. Requests from those travelling with medical issues that prohibit them from leaving their vehicle and customers who prefer to remain with a pet in their vehicle can present terminal and vessel accommodation challenges due to the volume of requests received for any given sailing. Website wording was updated to clarify how customers may request to be on the upper vehicle deck and to explain that such requests cannot always be honoured, depending on vessel capacity and load management.
- Building on the successful introduction of vegan options, including lentil soup and the coconut chia breakfast bowl, additional vegan options for customers (vegan cheese, yogurt, and entrees) continue to be explored, including oat milk as a non-dairy alternative.
- Priority vehicle loading has been established on specific sailings for a limited number of vehicles travelling from Cortes Island-Quadra Island and Hornby Island-Denman Island to enable these customers to successfully transition through to their next sailing.

Comment Summary and Actions Taken



General (cont'd):

- In response to overloads on the 7:30 am sailing from Bowen Island-Horseshoe Bay during Fiscal 2019, Transport Canada approved an increase in passenger capacity for the *Queen of Capilano*. The vessel can now carry 40 additional passengers while operating on a "B" license on this route. Passenger overloads have not occurred since this change.
- During episodes of heavy traffic/sailing waits, vessels on the Buckley Bay-Denman Island, Denman Island-Hornby Island and Campbell River-Quadra Island routes provide shuttle service in order to meet demand. This reduces instances of multiple sailing waits and helps move vehicles from roads, where they can impact local traffic, into terminals and onto vessels as quickly as possible. Vessels return to schedule once traffic levels recover.

Part B: Engagement



1. Stakeholder Engagement



- BC Ferries actively engages stakeholders to improve service and to reach out and hear from the customers and communities it serves
- BC Ferries follows a process of consultations and engagement as set out in its Stakeholder and Community Engagement Framework
- As detailed in the following pages, engagement activities are commonly conducted through the following channels:
 - Meetings and liaison activities with 13 Ferry Advisory Committees (FACs)
 - Engagement to support projects and initiatives
 - First Nations engagement, including engagement to support projects and initiatives
 - Other engagement including Terminal Liaison Committees, BC Trucking Association and BC Ferries' Committee on Accessibility

i. Ferry Advisory Committees



Fiscal 2019

Ferry Advisory Committee Meetings



- BC Ferries has meetings twice yearly with FACs to discuss local community, terminal and service issues
- BC Ferries also engages with FACs at other times, such as to address emerging issues and critical events
- Meetings were held during May/June and October/November with the following FACs:
 - Southern Gulf Islands
 - Chemainus / Thetis Island / Penelakut Island
 - Salt Spring Island
 - North & Central Coast
 - Northern Sunshine Coast
 - Southern Sunshine Coast
 - Gambier / Langdale / Keats
 - Bowen Island Municipality
 - Gabriola
 - Campbell River / Quadra Island / Cortes Island
 - Tri-Island (Port McNeill / Sointula / Alert Bay)
 - Denman / Hornby

Common FAC Themes / Improvements: Significant Service Requests



- Traffic levels are increasing on some routes. Where warranted, BC Ferries has made service level adjustments
- BC Ferries will review proposals for increased service levels received from FACs using the formal Significant Service Request (SSR) process
- As a result of the SSR process, BC Ferries made the following changes in the year ended March 31, 2019 (Fiscal 2019):
 - Route 24 (Quadra Island-Cortes Island): added Sunday morning service
 - Route 10S (Discovery Coast Connector Service): extended residents' rate for Bella Coola sailings
 - Route 18 (Powell River-Texada Island): added summer sailings

Common FAC Themes / Improvements: Communications



- Communications is generally always a common theme with FACs as both BC Ferries and FACs work to continue to improve all forms of communications
- During Fiscal 2019, efforts included:
 - Implementation of digital signage for minor and unmanned terminals to provide customers with real time information
 - Standing up immediate FAC daily direct calls if abnormal operations occurs in a specific FAC area
 - Better reporting and delivery of Service Notices through website
- During Fiscal 2019, BC Ferries began a new FAC term
 - As per Terms of Reference, most FAC representatives who had served two terms or greater left their committees and new members were introduced
 - On some FACs, members representing stakeholder groups not present on FACs were now included, thus broadening perspective during discussions

Common FAC Themes / Improvements: Trends



- In addition to twice-yearly FAC meetings and newly introduced service description briefings, BC Ferries seeks to be responsive to communities through
 - Two FAC Chair calls per year; and
 - Meetings between the FACs and local operational teams to address route specific operational issues related to terminals, vessels and service. These meetings address issues of a more pressing, operational nature
- FACs also provide input into medium and longer term planning for terminals and vessels
 - BC Ferries engages with FACs in terms of vessel refits, new vessels and terminal development plans
- FACs have continued to express concerns over traffic growth to the island communities; they indicate that the islands are experiencing growth overall and that the summer peak period demand is also growing
- A common theme at FAC meetings is uplands safety issues at the minor and intermediate terminals
 - BC Ferries has formed a joint working group with the Ministry of Transportation and Infrastructure to collaborate on key improvements required for roadways on the small islands

ii. Engagement to Support Projects and Initiatives



Engagement Activities

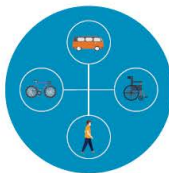
- BC Ferries acknowledges that people affected by a major decision should, whenever possible, be invited into the decision-making process in some capacity
- BC Ferries considers their input and, where possible, incorporates it into future planning
- The following pages detail BC Ferries' project-related community engagement activities during Fiscal 2019:
 - Horseshoe Bay Terminal Development Plan
 - Swartz Bay Terminal Development Plan
 - Langdale Terminal Development
 - Minor Terminal Development Plans
 - Bowen Class Vessel Replacements (Island Class Vessels)
 - Ferries for the Next Generation – New Major Vessels Project

Horseshoe Bay Terminal Development Planning

- **Purpose of engagement program:** To gather employee and community input that supports the creation of the Terminal Development Plan for Horseshoe Bay.
- **Engagement phase(s):** Engagement in Fiscal 2019 focused on gathering input on design drivers and a visual profile for the Horseshoe Bay Terminal Development Plan.
- **Engagement activities** included a series of employee and stakeholder workshops and online engagement.
- **Key themes:** Over 1,500 people participated in engagement in Fiscal 2019. Participants noted several key considerations for the terminal, including:



Practical,
cost-effective, &
functional solutions



Safe &
accessible
travel



Integration of
technology
& information



A comfortable
customer
experience



Integration with
the Horseshoe Bay
Village & surrounding
environment

Horseshoe Bay Terminal Development Planning

- **Outcomes:** Input from employees and the community was used to create and validate a list of design drivers (listed on the right) and to build a visual profile.
- **Next steps:** The design drivers and visual profile will guide the creation of terminal design concepts that will be presented to the community for feedback in Fiscal 2020.



Swartz Bay Terminal Development Planning

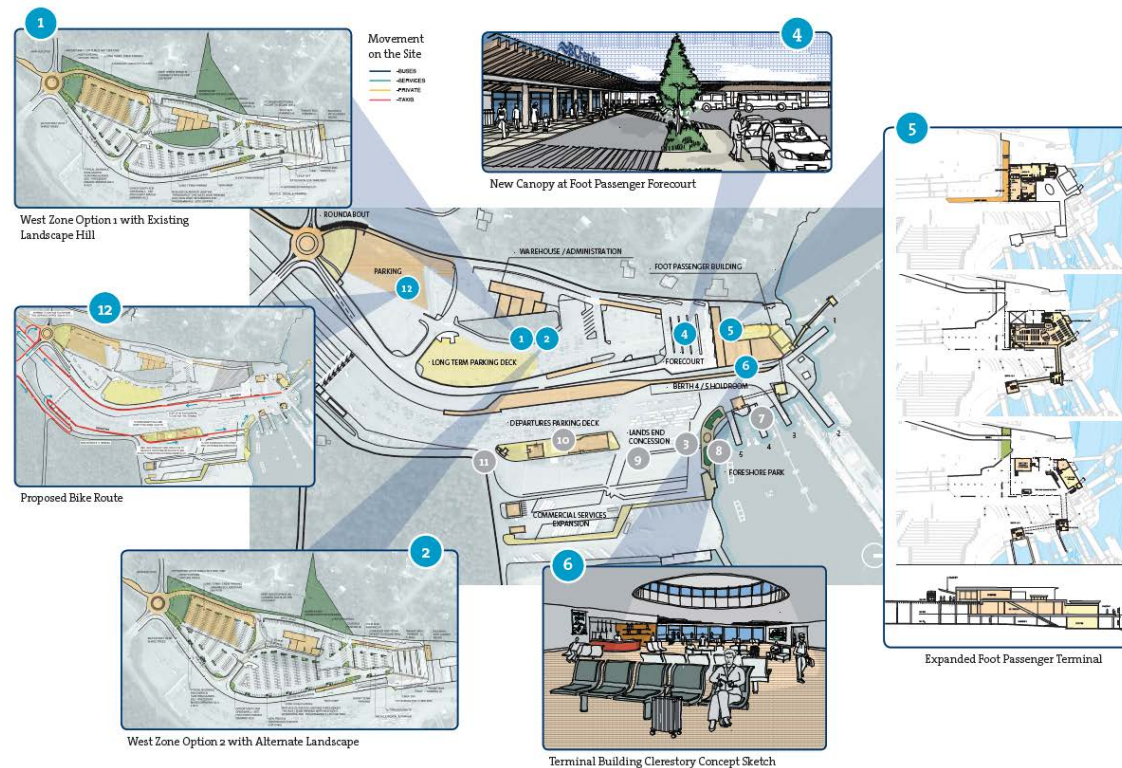


- **Purpose of engagement:** To gather employee and public input that supports the creation of the Terminal Development Plan for the Swartz Bay terminal.
- **Engagement phase(s):** Engagement in Fiscal 2019 focused on gathering input on key issues and opportunities for the terminal, and developing draft terminal design concepts.
- **Engagement activities** included stakeholder meetings, meetings with First Nations, open houses, pop-up events at the terminal, employee pop-up events, and online engagement.
- **Key themes:** Approximately 2,000 people participated in engagement in Fiscal 2019. Key themes included:

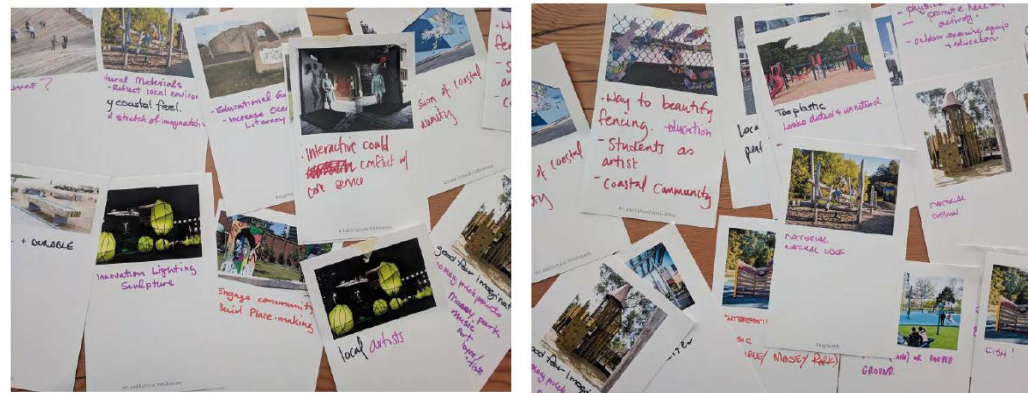


Swartz Bay Terminal Development Planning

- **Outcomes:** Input was used to develop terminal concepts, and to narrow concepts to a preferred option for inclusion in the Terminal Development Plan (see the image below).
- **Next steps:** Complete final phase of engagement to introduce the approved Terminal Development Plan to key stakeholders and the community.

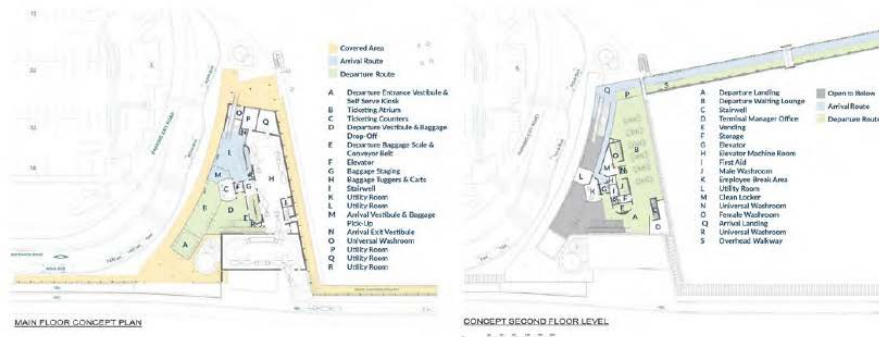


- Idea cards generated by key stakeholders & employees workshops.



Langdale Terminal Development

- **Outcomes:** Overhead walkway plans finalized, and input being used to finalize the design of landscaping, children's playground, and art and cultural installations.
- **Next steps:** Finalize designs, communicate construction timelines and plans for mitigating construction impacts to the community.



Building plans and ideas presented to stakeholders during engagement.

Minor Terminal Development Planning

- **Purpose of engagements:** To gather employee and community input that supports the development of Terminal Development Plans for BC Ferries' minor terminals.
- **Engagement phase(s):** Engagement for several minor Terminal Development Plans occurred in Fiscal 2019, including:

Engagement completed for	Engagement started for
Alliford Bay	Campbell River
Skidegate	Fulford Harbour
Gabriola Island	
Nanaimo Harbour	
Central Coast terminals (Bella Coola, McLoughlin Bay, Ocean Falls, Shearwater)	

- **Engagement activities** included employee and key stakeholder meetings and workshops, First Nations meetings, open houses, and online engagement.
- **Key themes** included safety and traffic flow considerations (e.g. holding capacity at terminals), enhanced terminal amenities to improve customer experience and comfort while waiting, and the inclusion of First Nations place names and artwork at terminals.

Minor Terminal Development Planning

- **Outcomes:** For those terminals where engagement was completed, input was used to develop terminal concepts, and to narrow concepts to a preferred option for inclusion in the Terminal Development Plan. For those where engagement is still in progress, input is being used to refine terminal design concepts for presentation back to the community in later phases.
- **Next steps:** Complete next phases of engagement for Campbell River, Crofton, and Fulford Harbour terminals to assist in developing a preferred design for inclusion in Terminal Development Plans.

Engagement summary infographic for Nanaimo Harbour and Gabriola Island Terminal Development Plan engagement efforts.



YOUR INPUT IS IMPORTANT TO US AND WILL HELP SHAPE OUR FUTURE PLANS.



Bowen Class Vessel Replacements (Island Class vessels) Routes 19 & 23

- **Purpose of engagement:** Gather feedback from communities regarding their preference for vessels and service on the Campbell River-Quadra Island and the Nanaimo Harbour-Gabriola Island runs.
- **Engagement phase(s):** Community engagement occurring during Q2 Fiscal 2019 focused on preference for a one or two-ship service on these routes. Employee engagement in Q3 Fiscal 2019 focused on introducing the Island Class general arrangement to employees and answering questions about the ship's design and operation.
- **Engagement activities** included open houses, pop-up events, online engagement, and employee outreach.
- **Key themes:** Over 1,400 people participated in community engagement and indicated a strong preference for two-ship service. Employees noted interest in propulsion systems, vessel size, crewing profiles, and passengers' accessibility on the new Island Class vessels.
- **Outcomes:** A two-ship service is planned for Routes 19 and 23.
- **Next steps:** Introduce the Island Class design to the community later in 2019.



Ferries for the Next Generation – New Major Vessels

- **Purpose of engagement program:** To gather employee and public input that supports the design of the new major vessel replacements.
- **Engagement phase(s):** The engagement program began in Q4 Fiscal 2019 with employee engagement in February 2019 and community engagement occurring mid-March to early April 2019.
- **Engagement activities** included employee engagement, stakeholder workshops, online engagement, and pop-up engagement events on board major vessels.
- **Key themes & outcomes:** Engagement still in progress at the end of Fiscal 2019.
- **Next steps:** Complete community engagement efforts and develop summary reports for employee and community engagement efforts. Begin planning for the next phase of engagement.



2. First Nations Engagement



First Nations Engagement



- As part of engagement on all major projects, BC Ferries invites early participation from First Nations with interests in the land and waters potentially impacted by projects.
- For all major projects, notification letters are sent to First Nations introducing the project scope and inviting meetings with project team members and/or participation by First Nations in community engagement activities (e.g. open houses, workshops, online etc.).
- In Fiscal 2019, BC Ferries met with the following First Nations to discuss specific projects:
 - Swartz Bay Terminal Development Plan
 - Tsawout First Nation & Tseycum First Nation
 - Campbell River Terminal Development Plan
 - We Wai Kai First Nation, We Wai Kum First Nation & Homalco First Nation
 - Skidegate & Alliford Bay Terminal Development Plans
 - Haida First Nation
 - Ferries for the Next Generation
 - Malahat First Nation & Tsawwassen First Nation

3. Other Engagement



- Terminal Liaison Committees (Horseshoe Bay, Swartz Bay and Departure Bay)
 - There are three Terminal Liaison Committees, which BC Ferries meets with on an as-needed basis. In Fiscal 2019, BC Ferries met on a number of occasions with each of the Terminal Liaison Committees at Swartz Bay and Horseshoe Bay to discuss neighbourhood concerns, including those arising from terminal lights, noise and vibration, and air pollution. Special meetings were also convened to discuss ongoing Terminal Development Planning for these two terminals. Two brief meetings were held with the Departure Bay Terminal Liaison Committee during the fiscal year, with a goal of increasing representation on the committee for more fulsome meetings in the future.
 - Going forward, BC Ferries will be meeting on a periodic basis with the appropriate Terminal Liaison Committees to discuss considerations related to ongoing terminal development planning.
- BC Trucking Association (BCTA)
 - During the fiscal year, BC Ferries in consultation with the BCTA, established a process for oversize units travelling on the route connecting the Sunshine Coast and Metro Vancouver (Route 3). This process was developed to gain greater consistency and predictability for customers moving oversize units (summer 2018).
 - BC Ferries also liaised with BCTA regarding the Swartz Bay Terminal Development Plan and commercial customer needs associated with future development of the terminal (spring 2019).
- BC Ferries' Committee on Accessibility
 - BC Ferries' Accessibility Committee met in the spring and fall of 2018 to discuss standing agenda items related to service delivery concerns, loading and unloading practices, vessel and terminal design changes, and suggestions for improvement to the customer experience.

Directory

Routes and Terminals by Region

VANCOUVER ISLAND – MAINLAND

ROUTE LABEL	TERMINALS
ROUTE 1	SWARTZ BAY-TSAWWASSEN
ROUTE 2	DEPARTURE BAY-HORSESHOE BAY
ROUTE 30	DUKE POINT-TSAWWASSEN

SOUTHERN GULF ISLANDS

ROUTE LABEL	TERMINALS
ROUTE 4	FULFORD HARBOUR-SWARTZ BAY
ROUTE 5	SWARTZ BAY-SOUTHERN GULF ISLANDS
ROUTE 6	CROFTON-SALT SPRING ISLAND
ROUTE 9	TSAWWASSEN-SOUTHERN GULF ISLANDS
ROUTE 12	BRENTWOOD BAY-MILL BAY
ROUTE 19	GABRIOLA ISLAND-NANAIMO
ROUTE 20	CHEMAINUS-PENELAKUT ISLAND-THETIS ISLAND

NORTHERN GULF ISLANDS

ROUTE LABEL	TERMINALS
ROUTE 21	DENMAN ISLAND WEST-BUCKLEY BAY
ROUTE 22	DENMAN ISLAND EAST-HORNBY ISLAND
ROUTE 23	CAMPBELL RIVER-QUATHIASKI COVE
ROUTE 24	QUADRA ISLAND-CORTES ISLAND
ROUTE 25	PORT McNEILL-MALCOLM ISLAND-ALERT BAY

SUNSHINE COAST

ROUTE LABEL	TERMINALS
ROUTE 3	HORSESHOE BAY-LANGDALE
ROUTE 7	EARLS COVE-SALTARY BAY
ROUTE 8	BOWEN ISLAND-HORSESHOE BAY
ROUTE 13	GAMBIER ISLAND-KEATS LANDING-LANGDALE-KEATS ISLAND WEST
ROUTE 17	COMOX-POWELL RIVER
ROUTE 18	POWELL RIVER-TEXADA ISLAND

MID & NORTH COAST

ROUTE LABEL	TERMINALS
ROUTE 10	PORT HARDY-NORTH COAST (McLOUGHLIN BAY, OCEAN FALLS, BELLA COOLA, SHEARWATER, KLEMTU)
ROUTE 10S/28A	DISCOVERY COAST CONNECTOR SERVICE (McLOUGHLIN BAY, OCEAN FALLS, BELLA COOLA, SHEARWATER)
ROUTE 11	PRINCE RUPERT-SKIDEGATE LANDING
ROUTE 26	SKIDEGATE LANDING-ALLIFORD BAY
ROUTE 28	PORT HARDY-BELLA COOLA

Customer Satisfaction Tracking Report

2018



Customer Satisfaction Tracking Annual Report 2018

British Columbia Ferry Services Inc.

Presented to:

British Columbia Ferry Services Inc.
Victoria, British Columbia



402 – 1505 West Second Avenue Vancouver BC V6H 3Y4

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Executive Overview

Background

British Columbia Ferry Services Inc. (BC Ferries), conducts a Customer Satisfaction Tracking (CST) study each year. The CST study is designed to monitor customer satisfaction with various aspects of service on BC Ferries in order to determine areas that passengers believe are performing well and areas that require improvement. This study is part of a regular program of ongoing research conducted each year by BC Ferries.

The following report provides annual customer satisfaction results for the following:

- Overall ferry service
- Service prior to arriving at the terminal
- Service at the ferry terminal
- Service onboard the ferry
- Service pertaining to loading/unloading
- Overall safety of operations, and
- Value for money of fares paid

For each of the more than sixty attributes, the scores for the last six years are shown on the graphs, to allow for easy comparison.

In addition to graphs showing the overall scores, the Appendix in this report includes detailed tables by route showing satisfaction scores for each of the service attributes for 2018. The Appendix also includes detailed satisfaction scores for each of the terminal-related attributes, shown separately for each of the main terminals

Methodology

The research involves a two-phased approach. First a random sample of passengers are intercepted onboard to collect key data including frequency of travel on BC Ferries, purpose of trip, area of residence, origin/destination, and standard demographic questions. Immediately following this screener, passengers are given a longer follow-up survey to complete on paper or online after they disembark and leave the terminal area.

In 2018, five routes were added to the tracking program, bringing the total number of routes covered by the research to fourteen (interviews distributed across both larger and smaller routes). In this report, results are presented for both the traditional routes covered by the program (identified as Total '18), and then those same routes plus the five added routes in 2018 (identified as Total '18**). This has been provided to allow for comparisons to past results whilst also illustrating the results including the added routes.

Interviews are distributed across the fourteen routes in total, during three different time periods: June, August and November, 2018. Based on the traditional routes, a total of 8,567 screener surveys were completed and 3,851 questionnaires were returned (12,475 screener surveys and 5,521 questionnaires based on all fourteen routes). A more detailed explanation of the research design is included in the Research Methodology section, in the Appendix of this report.

Findings

Customers were asked to rate their satisfaction with over sixty different aspects of the services they received from BC Ferries on a scale from 1 to 5 where 1 means 'very dissatisfied' and 5 means 'very satisfied'.

Satisfaction with BC Ferries Overall

- A total of 88% of passengers in 2018 reported to be satisfied overall with their experience traveling on BC Ferries, resulting in an average score of 4.22. This represents an increase from the 4.16 average score, 87% satisfied reported in 2017. The implementation of a fare freeze and the Sunrise/ Sunset fare promotion on major routes, fare reductions on minor routes and the reinstatement of free travel for seniors are likely contributors.
- While scores continue to be relatively stable by most routes, the average for Route 3 has significantly improved from 3.92 in 2017 to 4.18 this year. Furthermore, the result for South Gulf Island routes 5/9 has rebounded following a decrease last year, improving from a 4.14 average in 2017 to 4.24 this measure. Modified sailing schedules, in addition to fare reductions and promotions have likely contributed to the improved scores for both routes.

Satisfaction before Arriving at Terminal

- Satisfaction with the website, the *ease of using online reservations* and highway signage are all similar to past results.
- Ratings for phone contact with BC Ferries suffered in 2018 with all-time lows registered for each of *usefulness of BC Ferries phone service* (from 3.61 in 2017 to 3.36), and for *ease of using the automated phone service* (3.46 to 3.15). Technical difficulties resulting from the introduction of the new phone system BC Ferries implemented in March, with system resolution only occurring near the end of July are likely to have had an impact.

Satisfaction at the Terminal

- Overall satisfaction with the experience at the terminal is consistent with previous measures (82% satisfied and an average score of 4.05). Although the overall average is unchanged, note the increase at Duke Point from 3.99 in 2017 to 4.15 this year (potentially a result of the Extra Length Vehicles Promotion on Routes 1 and 30).
- Among the added terminals measured this year, the average scores range from 3.83 at Bowen Island to 4.25 at Campbell River.
- Satisfaction levels continue to be high with all aspects of the ticket purchase process, and while a minor shift up is registered for clarity of staff directions (4.38 in 2017 to 4.41), there is a slight decrease in efficiency of the transaction (4.44 in 2017 down to 4.40).
- Although satisfaction levels with terminal *food and beverages offered* and *food value for money* are consistent with 2017 results, there is a downwards trend for *food and beverages offered* (from the peak of 3.68 in 2016 to 3.58 this year). In this measure, the average rating at Horseshoe Bay for this service has declined (3.63 in 2017 to 3.47 this year).
- Levels are stable for most foot passenger services at the terminal before boarding. The lone exception is an improvement in *availability of seating in pre-boarding lounge* (3.54 last measure to 3.73 this year), with the slight shift to less foot passenger volume this year a potential reason.

Satisfaction Onboard

- Overall satisfaction with the onboard experience stands at 89% and an average of 4.16, with the average score slightly higher than the 4.12 reported in 2017.
- While averages on most routes are stable, Route 3 registers an increase from 4.00 in 2017 to 4.11 this year. Furthermore, following a decline to 4.06 last year for the South Gulf Island routes 5/9, the average has rebounded and stands at 4.17 (similar to levels reported in 2015 and 2016). Although no vessel improvements are reported that would have produced the higher Route 3 score, resolution of issues with the Salish vessels in 2017 are likely to have made an impact on the SGI routes.
- Average scores for the routes added this measure range from 4.10 on Route 18 to 4.33 on Route 12.
- Increases are reported at the onboard gift shop/ newsstand for *staff customer service* (4.15 to 4.21) and *ease of moving around inside the shop* (3.61 to 3.70).
- As for onboard food services, following decreases reported in 2017, average scores have stabilized this year for *availability of seating* and for *food/ beverages offered*.
- Following a slight decrease in 2017, the average score for *availability of washrooms* has improved from 4.12 to 4.18, and an increase is also registered for *cleanliness of washrooms* (3.93 to 4.00).
- The average satisfaction score for *outside decks* has increased and stands at 4.07, an all-time high. Average satisfaction continues to fluctuate for *announcements when you need to be informed* (this year increasing from 3.90 to 3.96), and has improved for *outside appearance of the vessel overall* (from 4.00 to 4.05). Fluctuations also continue for *clarity of public address system* (increasing from 3.76 to 3.82 this year), and for *ease of access for people with disabilities* (improving from 3.66 to 3.75).

Satisfaction with Sailing Schedules

- The decline continues in average score for the ability to get onto desired sailing (from 3.62 in 2017 to 3.55 this year). Following a decrease to 3.73 in 2017, the result for ferry departing on time has rebounded to 3.86 this measure. Note as well the significant improvement for latest ferry late enough (from 3.54 last year to 3.76 currently), likely a result of changes to sailing schedules.
- Results of on time departures by route sees Route 2 sharply declining from a 3.81 in 2017 to a 3.59 average (supported by actual departure delays for this route increasing to an 11 minute average this year compared to the 6 minutes in 2017). However, significant improvements in satisfaction on this service aspect are noted on these routes:
 - Route 1 – 4.17 compared to 4.01 in 2017;
 - Route 3 – 3.55 vs 3.04;
 - Route 30 – 4.04 vs. 3.82;
 - South Gulf Island routes 5/9 – 3.82 vs. 3.60.
- Decreases in actual departure delay times for these four routes are likely to have made an impact.

Satisfaction with Safety

- A minor increase is reported for *safety of ferry operations* (4.25 to 4.28).

Satisfaction with Overall Value

- The average satisfaction score for the overall *value for money of fares* stands at 3.31, increasing for the fourth year in a row and representing an all-time high. The implementation of a fare freeze and the Sunrise/ Sunset fare promotion on major routes, plus fare reductions on minor routes and the reinstatement of free travel for seniors are likely contributors.

Detailed Findings

The following section shows the detailed findings from the study. It graphically displays the satisfaction scores for each of the 74 service attributes, showing both the average satisfaction score out of 5 as well as the percentage for each level of satisfaction, that is, 'Very Dissatisfied', 'Dissatisfied', 'Neither Satisfied/Dissatisfied', 'Satisfied' and 'Very Satisfied'. The ratings are shown for all surveyed BC Ferries routes combined and, where appropriate, the route-by-route scores are shown as well.

NOTE: When route numbers are shown in the graphs, please refer to the following table that explains each route number.

BC Ferries Routes Included in Customer Satisfaction Survey – 2018	
Route No.	Description of Route
Route 1	Tsawwassen – Swartz Bay
Route 2	Horseshoe Bay – Departure Bay
Route 3	Horseshoe Bay – Langdale
Route 30	Tsawwassen – Duke Point
Route 4	Swartz Bay – Fulford Harbour, Salt Spring Island
Route 19	Departure Bay – Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 8	Bowen – Horseshoe Bay
Route 12	Brentwood Bay – Mill Bay
Route 17	Powell River – Comox
Route 18	Texada Island – Powell River
Route 23	Campbell River – Quadra Island

Overall Satisfaction with BC Ferries

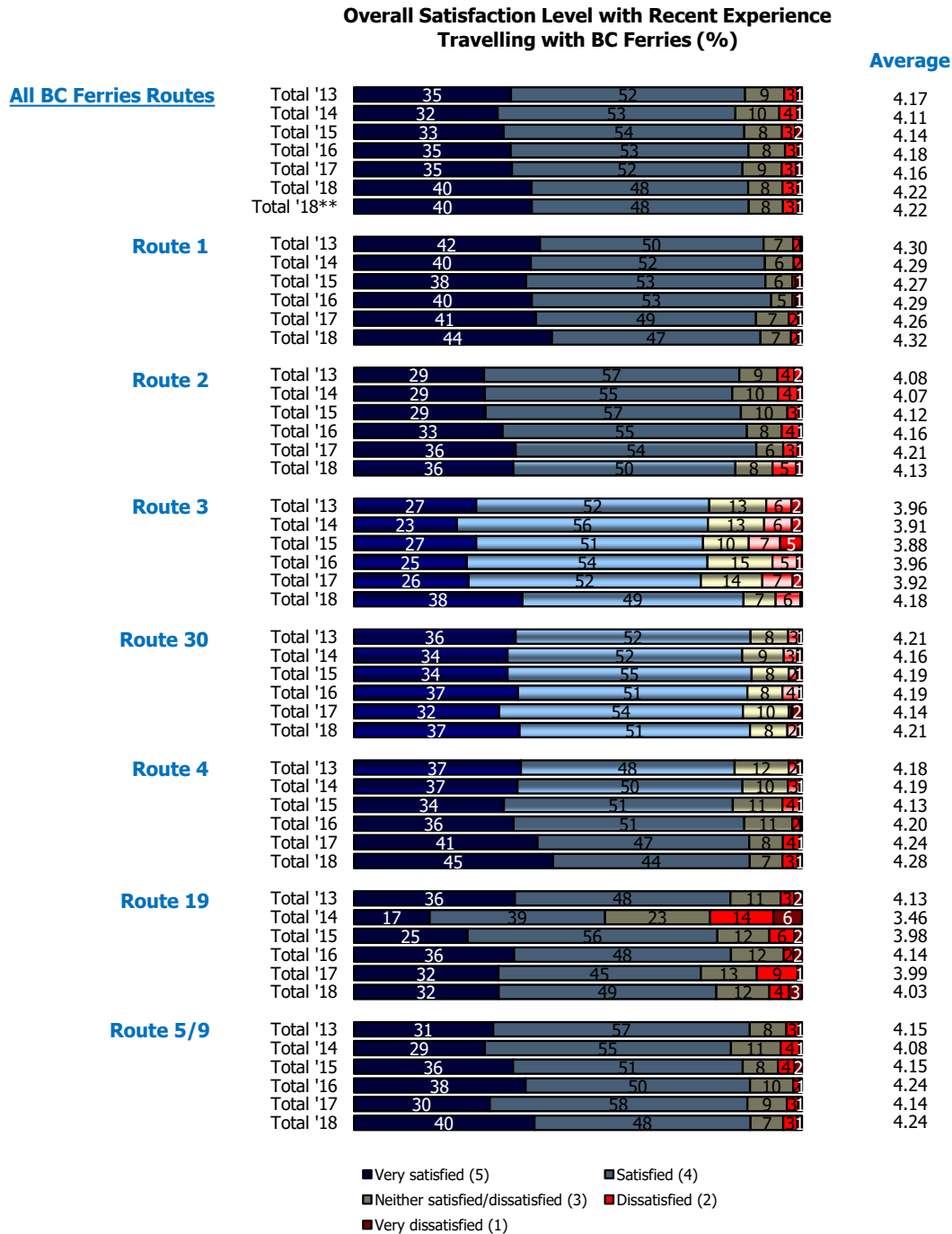
A total of 88% of passengers in 2018 reported to be satisfied overall with their experience traveling on BC Ferries, resulting in an average score of 4.22. This represents an increase from the 4.16 average score, 87% satisfied reported in 2017. The implementation of a fare freeze and the Sunrise/ Sunset fare promotion on major routes, fare reductions on minor routes and the reinstatement of free travel for seniors are likely contributors.

While scores continue to be relatively stable by most routes, the average for Route 3 has significantly improved from 3.92 in 2017 to 4.18 this year. Furthermore, the result for South Gulf Island routes 5/9 has rebounded following a decrease last year, improving from a 4.14 average in 2017 to 4.24 this measure. Modified sailing schedules, in addition to fare reductions and promotions have likely contributed to the improved scores for both routes.

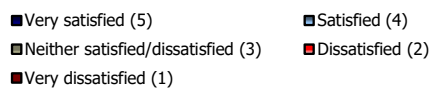
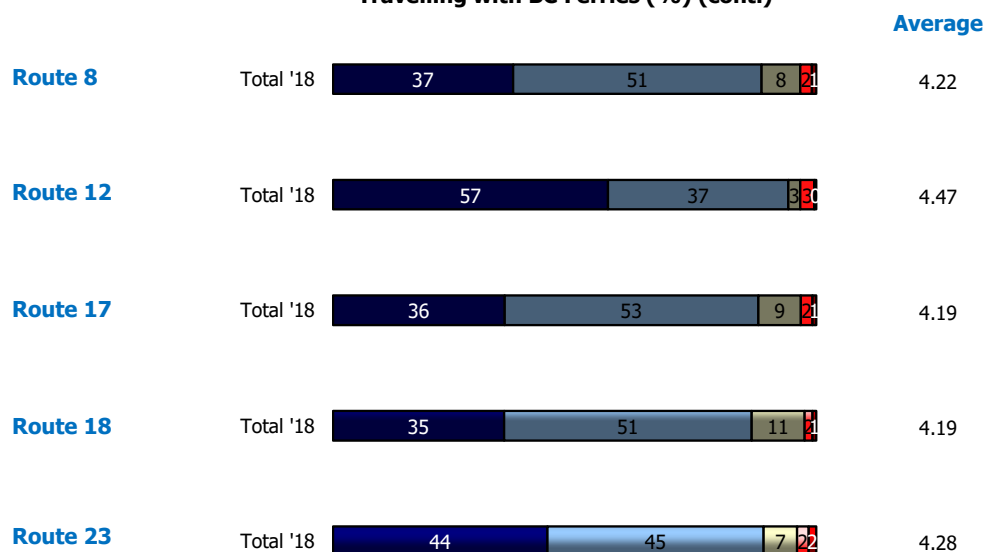
[NOTE: Refer to page 7 or page 35 for route descriptions]

Overall Satisfaction with BC Ferries

[NOTE: Refer to page 7 or page 35 for route descriptions]

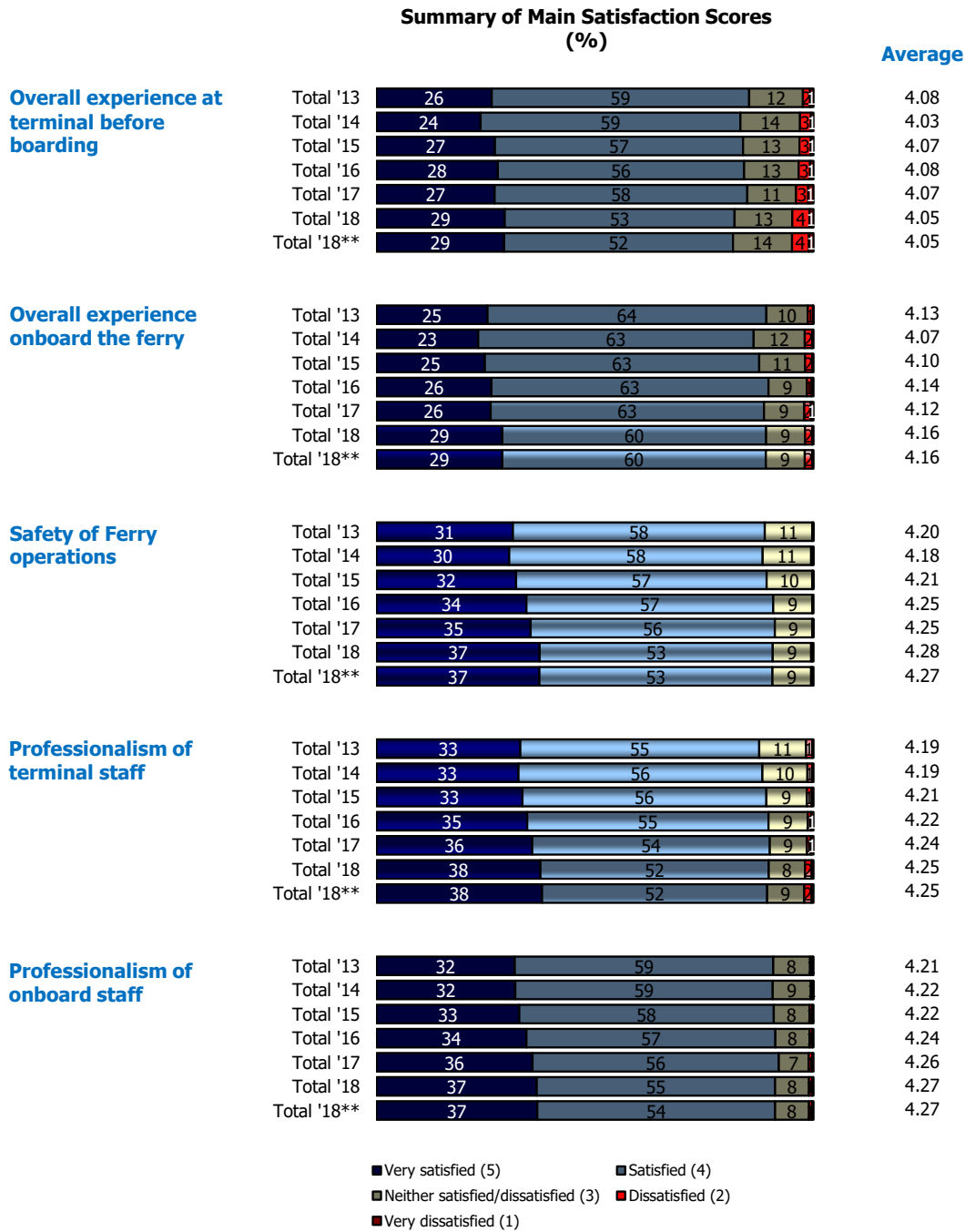


**Overall Satisfaction Level with Recent Experience
Travelling with BC Ferries (%) (cont.)**



Q.1) How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?

The following chart summarizes the results from overall measures of each main point of contact and specifically with BC Ferries staff. While most are consistent with past results, slight improvements are noted for the *overall experience onboard* (from 4.12 to 4.16), *safety of ferry operations* (4.25 to 4.28) and *staff customer service at onboard retail* (4.15 to 4.21).



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

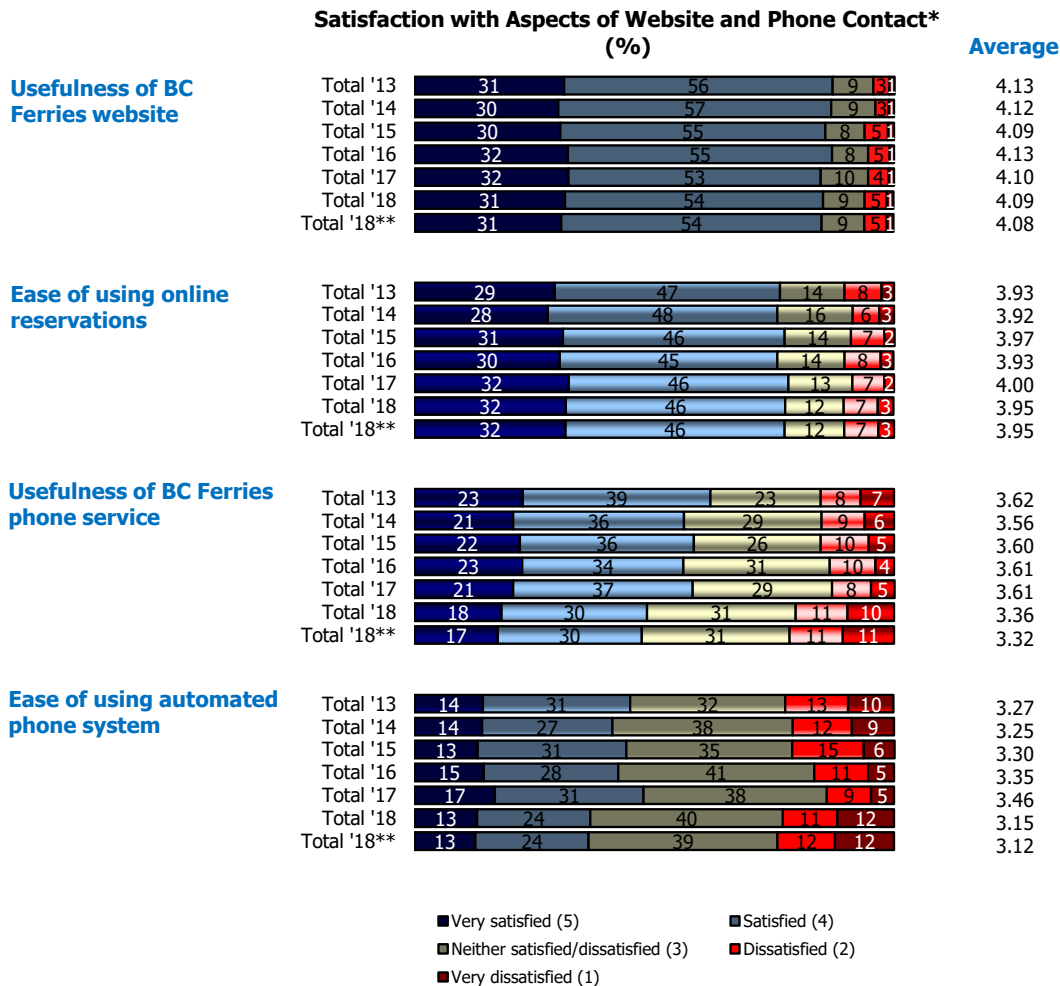
**Includes 5 additional routes

Before Arriving at Terminal

Website and Phone Contact

Satisfaction with the website and the *ease of using online reservations* is similar to past results.

Ratings for phone contact with BC Ferries suffered in 2018 with all-time lows registered for each of *usefulness of BC Ferries phone service* (from 3.61 in 2017 to 3.36), and for *ease of using the automated phone service* (3.46 to 3.15). Technical difficulties resulting from the introduction of the new phone system BC Ferries implemented in March, with system resolution only occurring near the end of July are likely to have had an impact.



Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

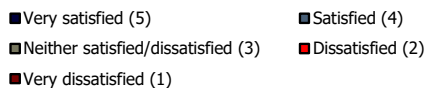
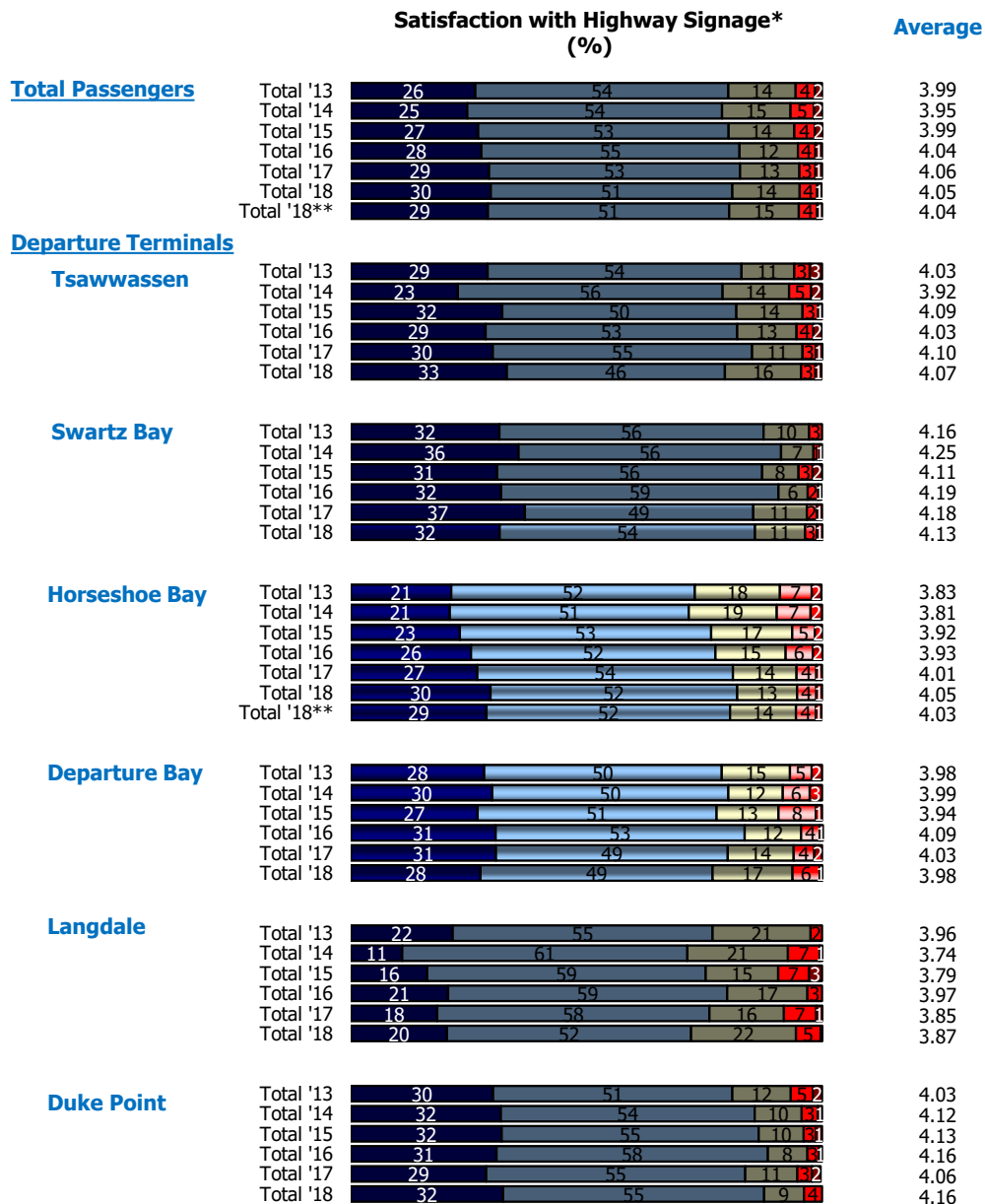
*Usage: 18% phone service, 16% automated phone system, 76% website, 46% online reservations

**Usage: 19% phone service, 16% automated phone system, 74% website, 45% online reservations

**Includes 5 additional routes

Highway Signage

The overall rating for highway signage is unchanged from 2017, overall and by terminal.

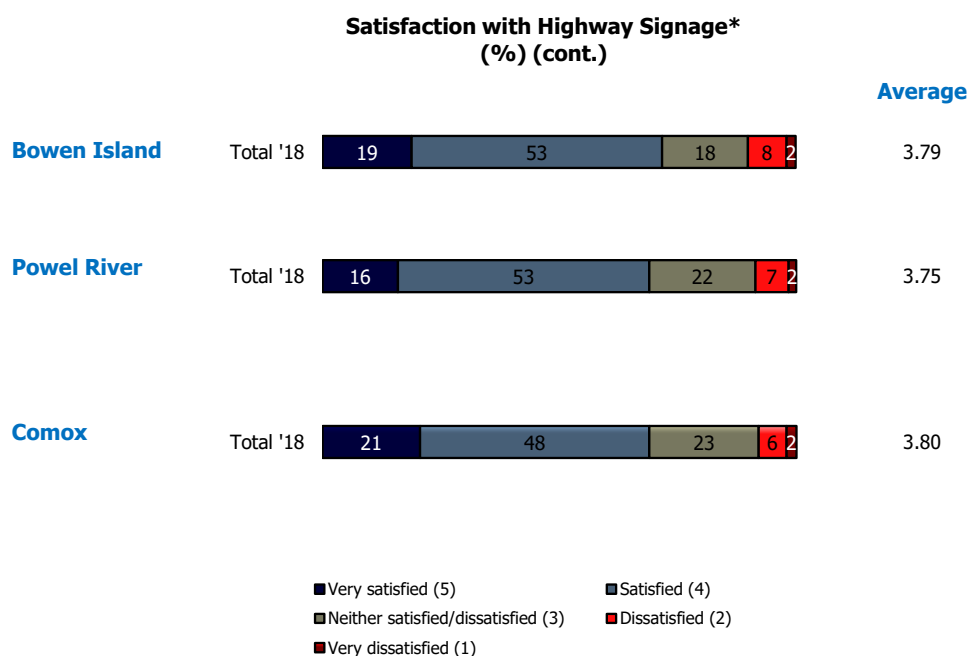


Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

*Usage: 78% highway signage

**Usage: 76% highway signage

**Includes 5 additional routes



Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

*Usage: 78% highway signage

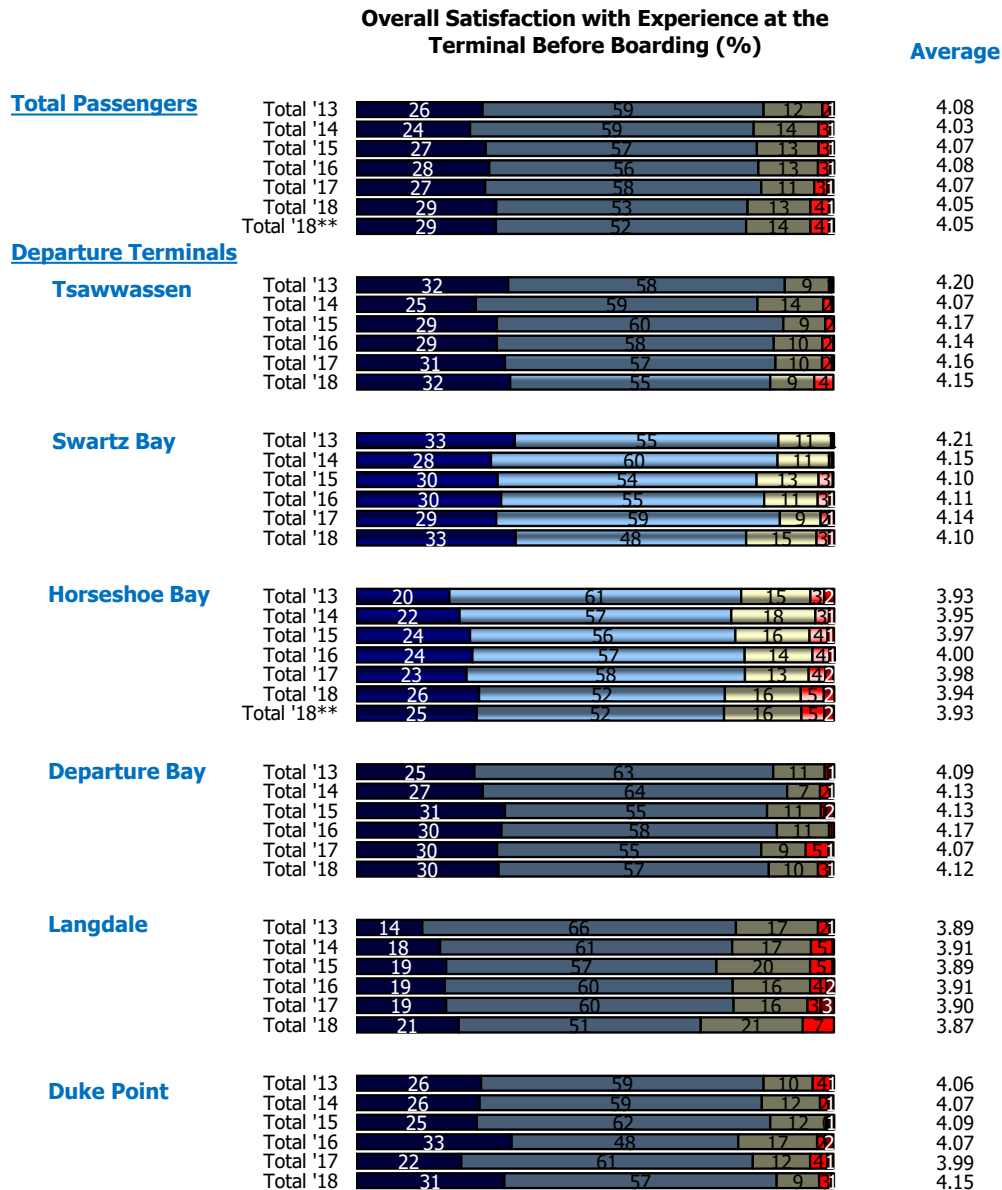
**Usage: 76% highway signage

**Includes 5 additional routes

At the Terminal

Overall Experience at the Terminal

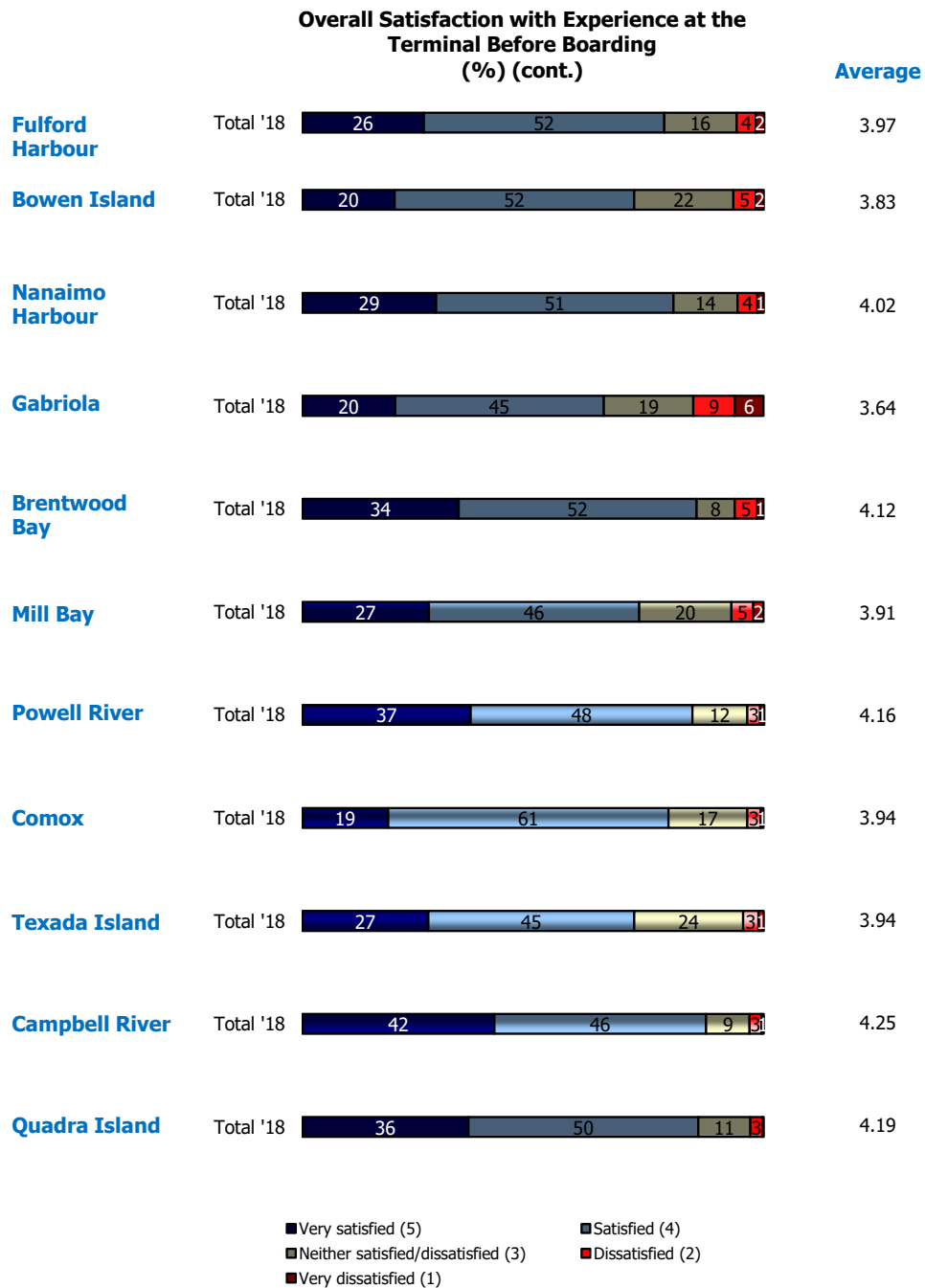
Overall satisfaction with the experience at the terminal is consistent with previous measures (82% satisfied and an average score of 4.05). Although the overall average is unchanged, note the increase at Duke Point from 3.99 in 2017 to 4.15 this year (potentially a result of the Extra Length Vehicles Promotion on Routes 1 and 30. Among the added terminals measured this year, the average scores range from 3.83 at Bowen Island to 4.25 at Campbell River.



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

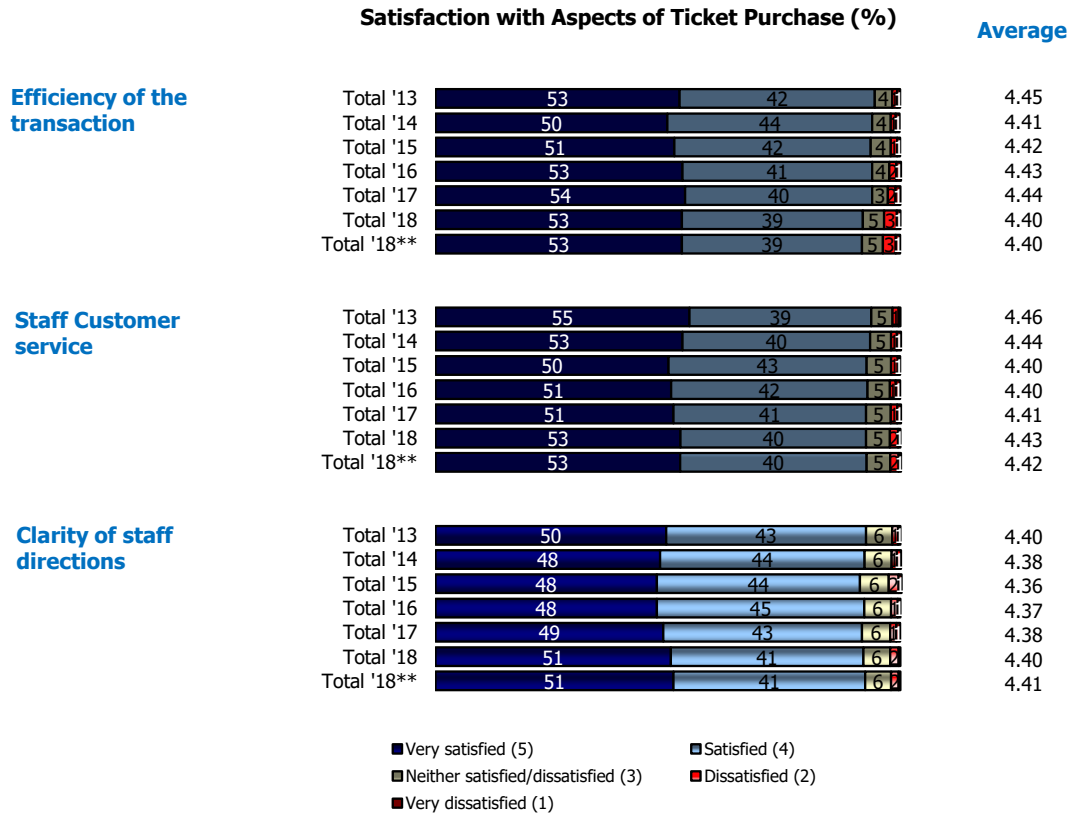
■ Very satisfied (5) ■ Satisfied (4)
 ■ Neither satisfied/dissatisfied (3) ■ Dissatisfied (2)
 ■ Very dissatisfied (1)



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

Ticket Purchase

Satisfaction levels continue to be high with all aspects of the ticket purchase process, and while a minor shift up is registered for *clarity of staff directions* (4.38 in 2017 to 4.41), there is a slight decrease in *efficiency of the transaction* (4.44 in 2017 down to 4.40).

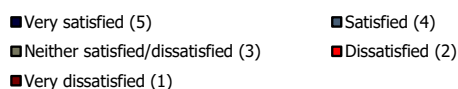
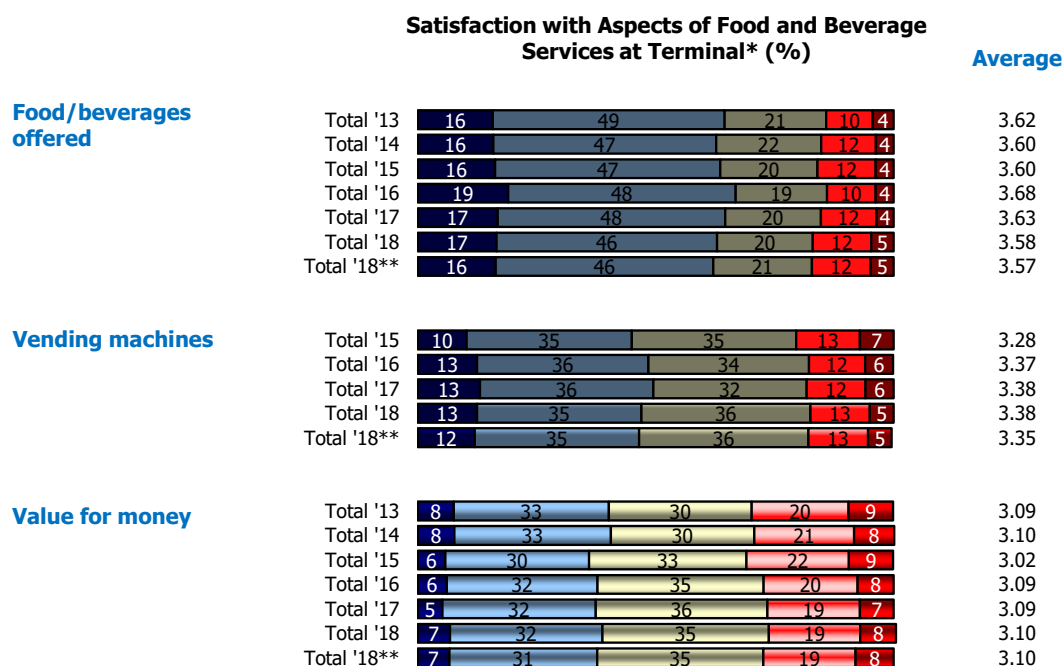


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

Food/Beverage Services at Terminal

Although satisfaction levels with *food and beverages offered* and *food value for money* at the terminal are consistent with 2017 results, there is a downwards trend for *food and beverages offered* (from the peak of 3.68 in 2016 to 3.58 this year). The average satisfaction score for terminal *vending machines* is unchanged.



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

*Usage: 46% food & beverage services, 25% vending machines

**Usage: 42% food & beverage services, 25% vending machines
(Excludes Route 12, 18, 19, 23)

**Includes 5 additional routes

Retail Services at Terminal

As in past measures, no changes are reported in satisfaction for terminal retail services.

Satisfaction with Aspects of Retail Services at Terminal* (%)

Terminal - Gift Shop/News Stand

Average

Variety/selection of merchandise

Total '13	22	49	22	51	3.86
Total '14	19	51	21	62	3.80
Total '15	23	51	19	52	3.88
Total '16	24	48	22	42	3.89
Total '17	22	50	21	52	3.87
Total '18	24	50	19	53	3.87
Total '18**	23	49	20	53	3.85

Value for money

Total '13	11	40	32	12	5	3.39
Total '14	10	39	32	13	6	3.36
Total '15	10	40	30	13	6	3.34
Total '16	11	34	35	15	5	3.32
Total '17	8	39	34	14	4	3.34
Total '18	10	39	33	13	5	3.35
Total '18**	10	38	33	13	5	3.34

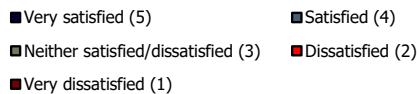
Terminal - Outdoor Market Area

Variety/selection of merchandise

Total '13	16	42	32	8	3	3.59
Total '14	13	42	34	8	4	3.52
Total '15	16	40	32	10	3	3.55
Total '16	15	41	33	8	3	3.58
Total '17	14	43	28	11	4	3.54
Total '18	13	42	30	9	5	3.49
Total '18**	13	41	31	9	5	3.48

Value for money

Total '13	10	33	40	12	4	3.33
Total '14	9	36	40	10	5	3.33
Total '15	10	34	38	14	5	3.30
Total '16	9	34	38	14	5	3.30
Total '17	8	38	37	12	6	3.29
Total '18	10	33	40	11	6	3.29
Total '18**	10	33	41	11	6	3.29



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

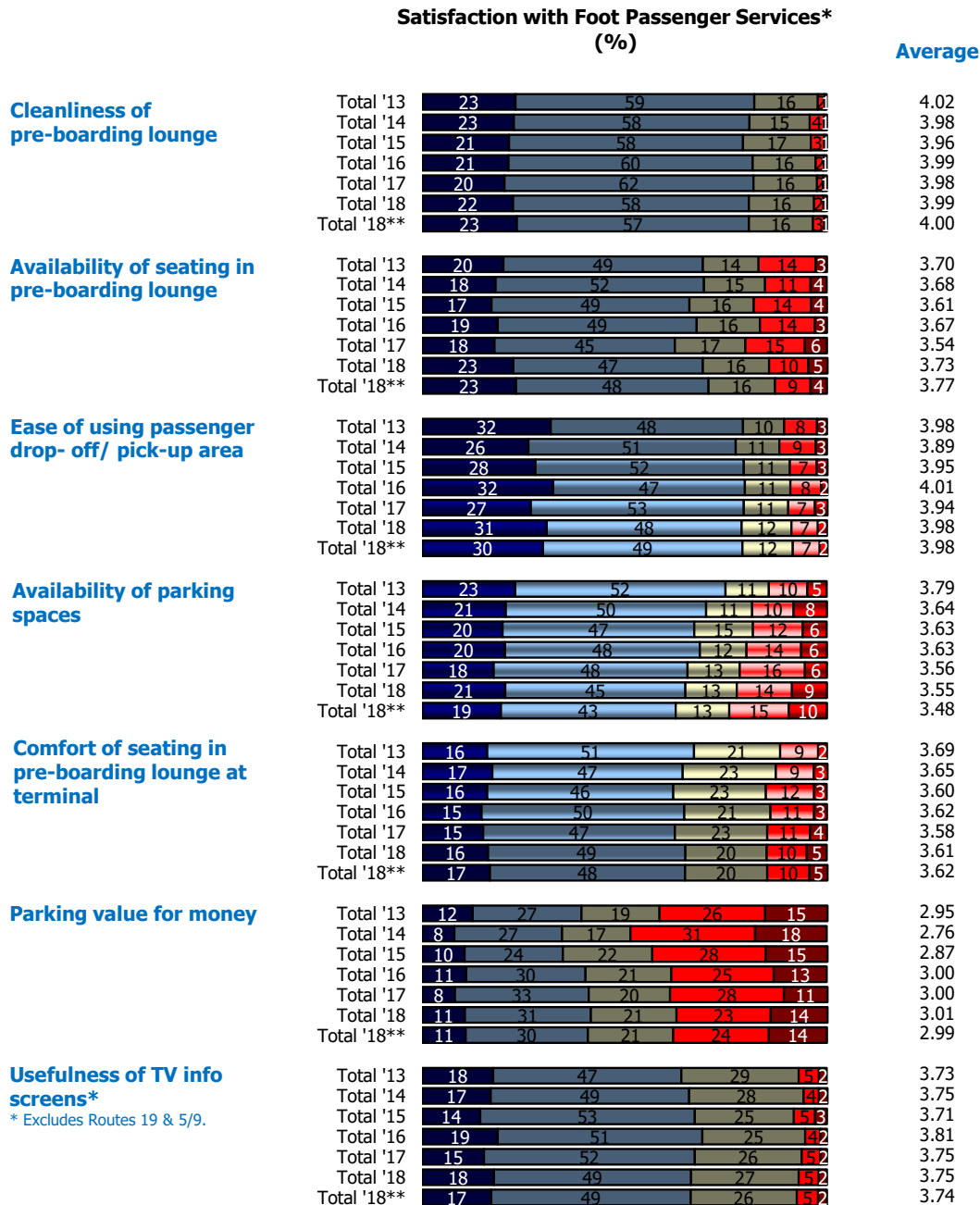
*Usage: 40% gift shop, 26% outdoor market

**Usage: 36% gift shop, 24% outdoor market
(excludes Route 12, 18, 19, 23).

**includes 5 additional routes

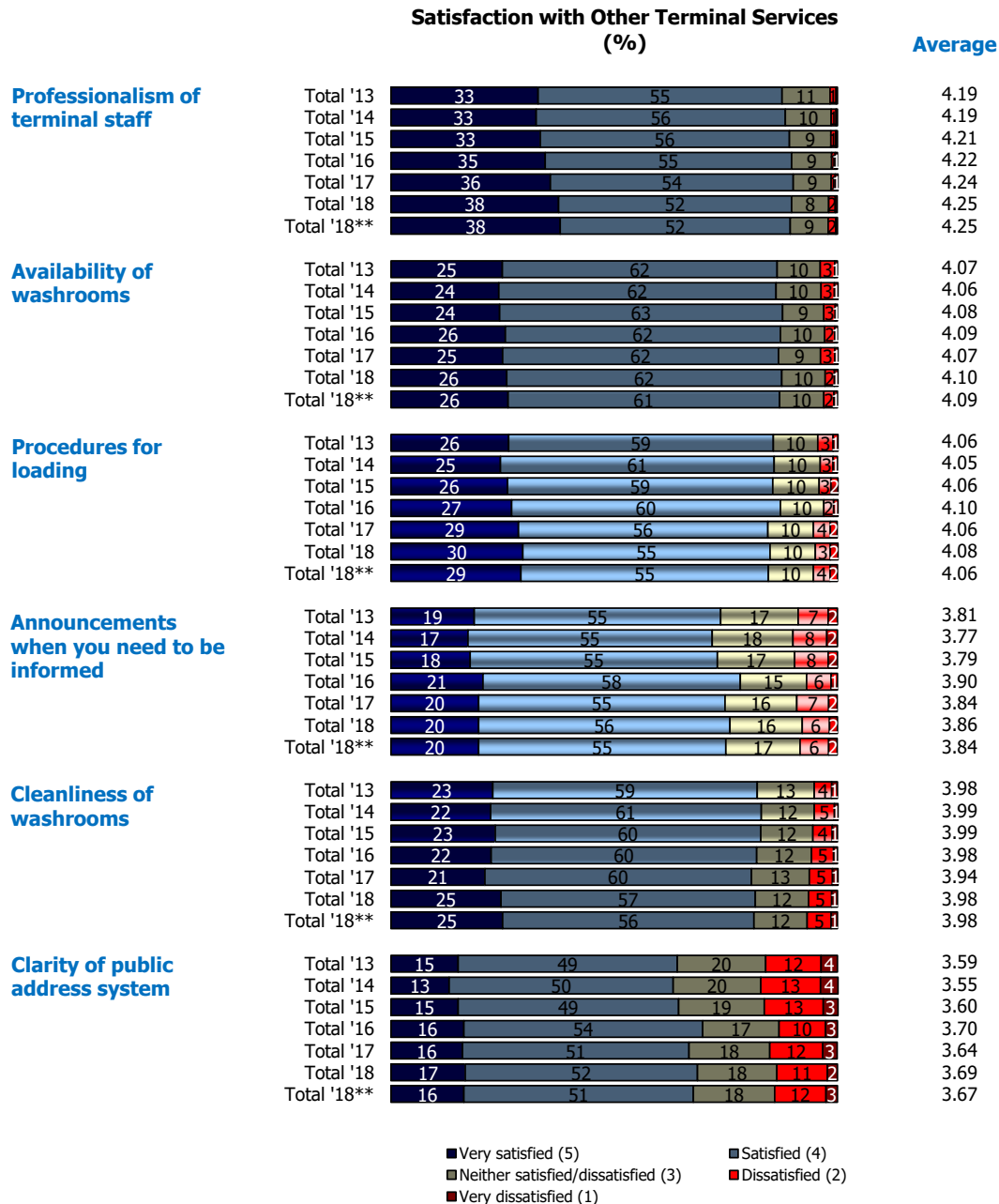
Foot Passenger Services

Levels are stable for most foot passenger services at the terminal before boarding. The lone exception is an improvement in *availability of seating in pre-boarding lounge* (3.54 last measure to 3.73 this year), with the slight shift to less foot passenger volume this year a potential reason.



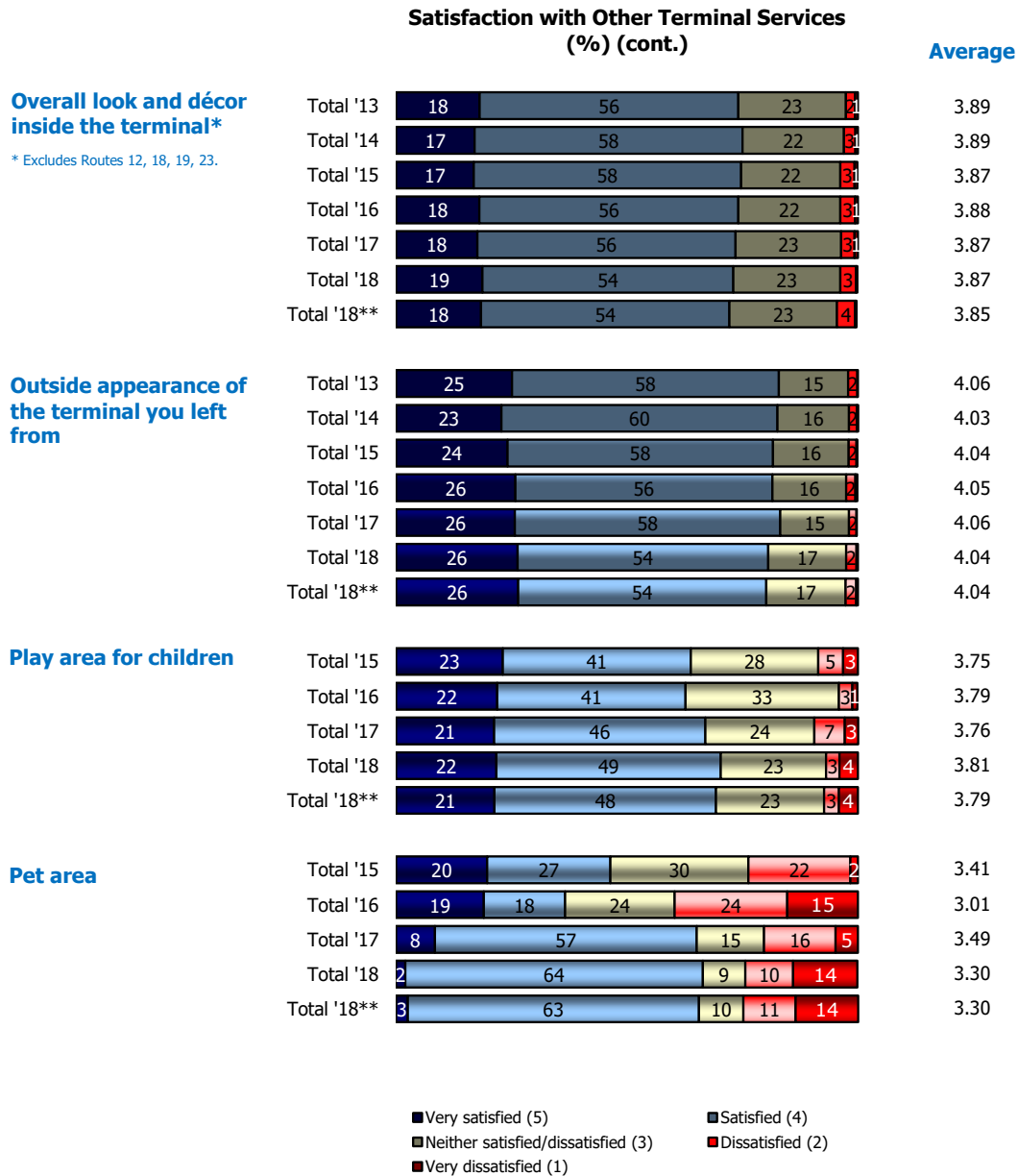
Other Terminal Services

After decreases were reported in 2017, levels are now stable for the following terminal service areas: *procedures for loading, announcements when you need to be informed, and clarity of the public address system.* (Note that any changes in average scores for the *play area for children* and the *pet area* are not significant due to low usage levels.)



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

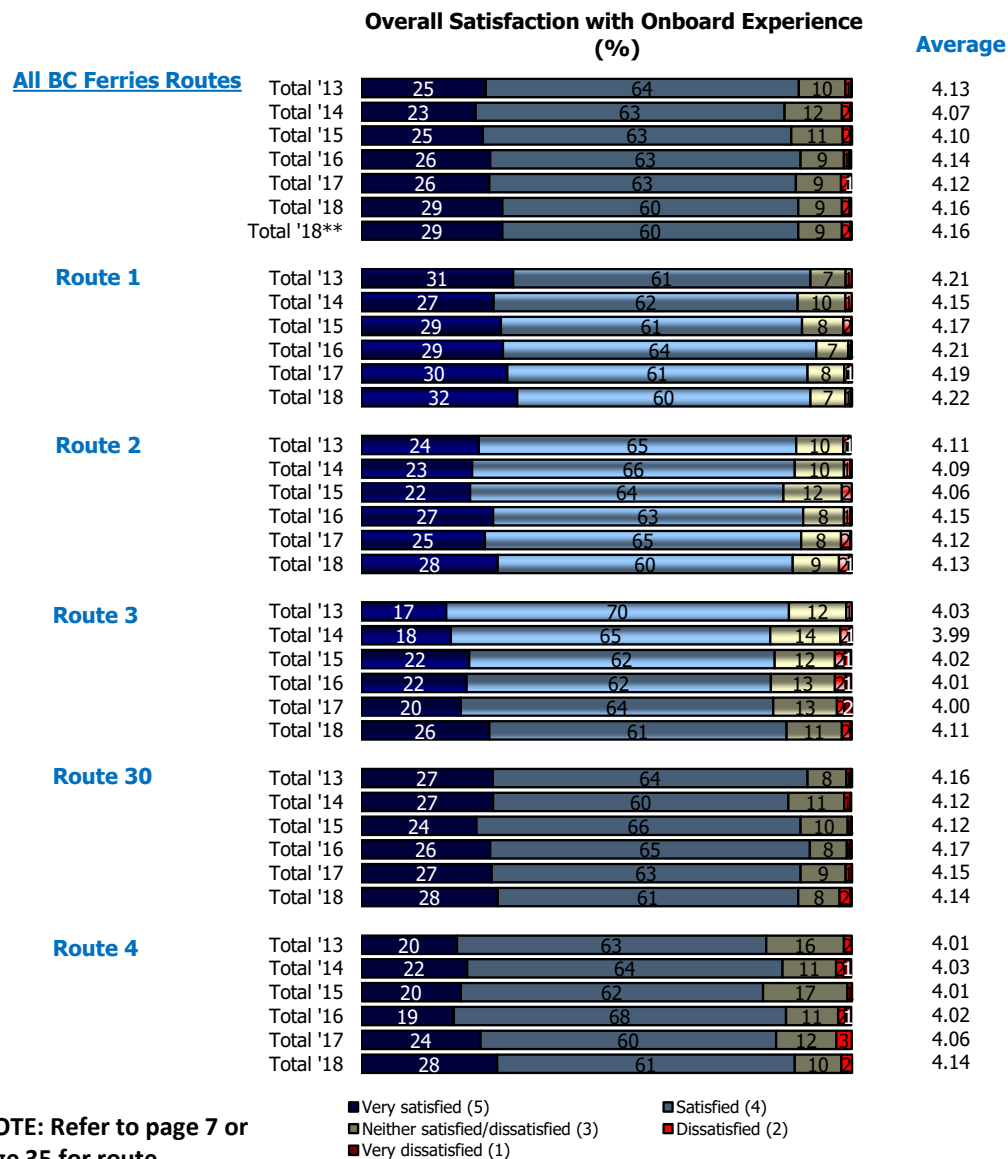


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.
 14% play area for children (excludes Routes 2, 3 8, 12, 18, 19)
 3% pet area (excludes Routes 2, 3 8, 12, 18, 19, 23)
 **Usage: 14% play area for children (excludes Routes 2, 3 8, 12, 18, 19)
 3% pet area (excludes Routes 2, 3 8, 12, 18, 19, 23)
 **Includes 5 additional routes

Onboard Experience

Overall Onboard Experience

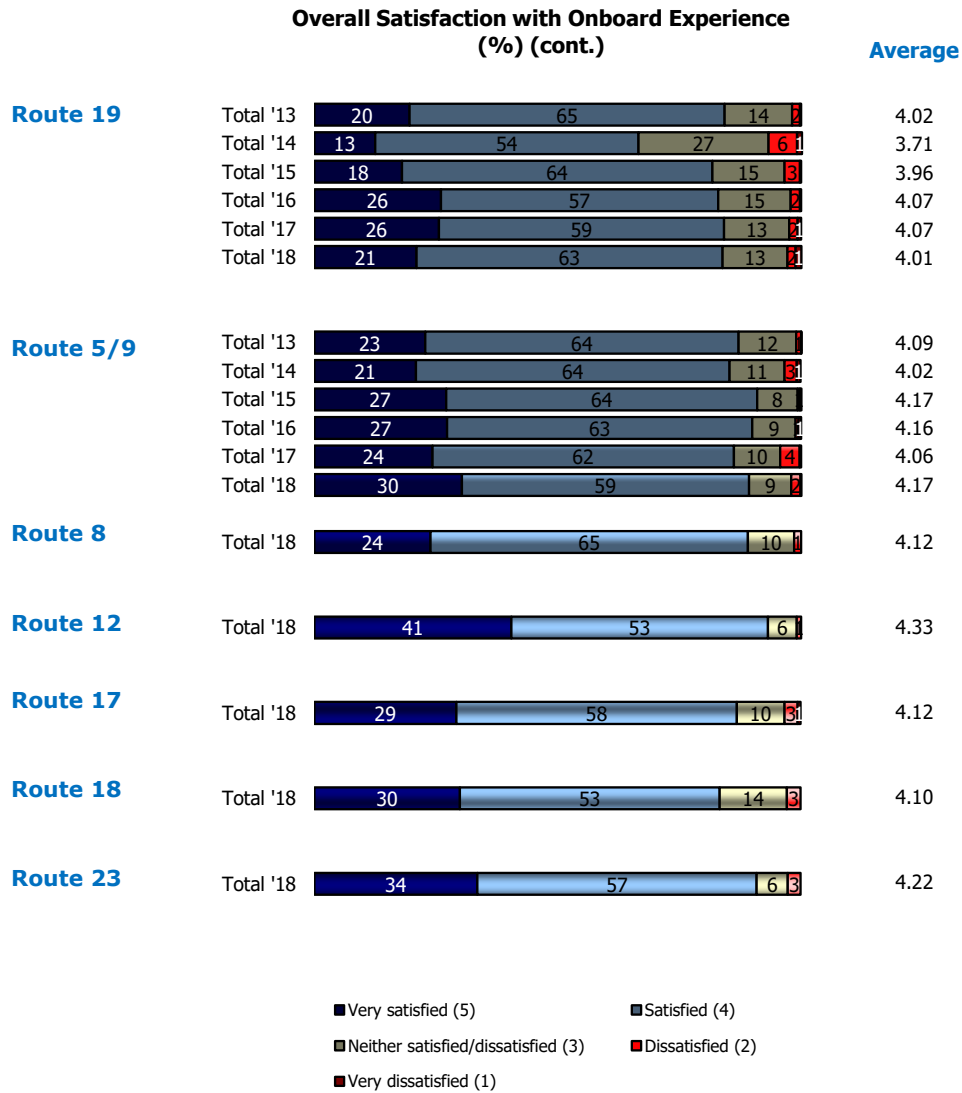
Overall satisfaction with the onboard experience stands at 89% and an average of 4.16, with the average score slightly higher than the 4.12 reported in 2017. While averages on most routes are stable, Route 3 registers an increase from 4.00 in 2017 to 4.11 this year. Furthermore, following a decline to 4.06 last year for the South Gulf Island routes 5/9, the average has rebounded and stands at 4.17 (similar to levels reported in 2015 and 2016). Although no vessel improvements are reported that would have produced the higher Route 3 score, resolution of issues with the Salish vessels in 2017 are likely to have made an impact on the SGI routes. Average scores for the routes added this measure range from 4.10 on Route 18 to 4.33 on Route 12.



[NOTE: Refer to page 7 or page 35 for route descriptions]

Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

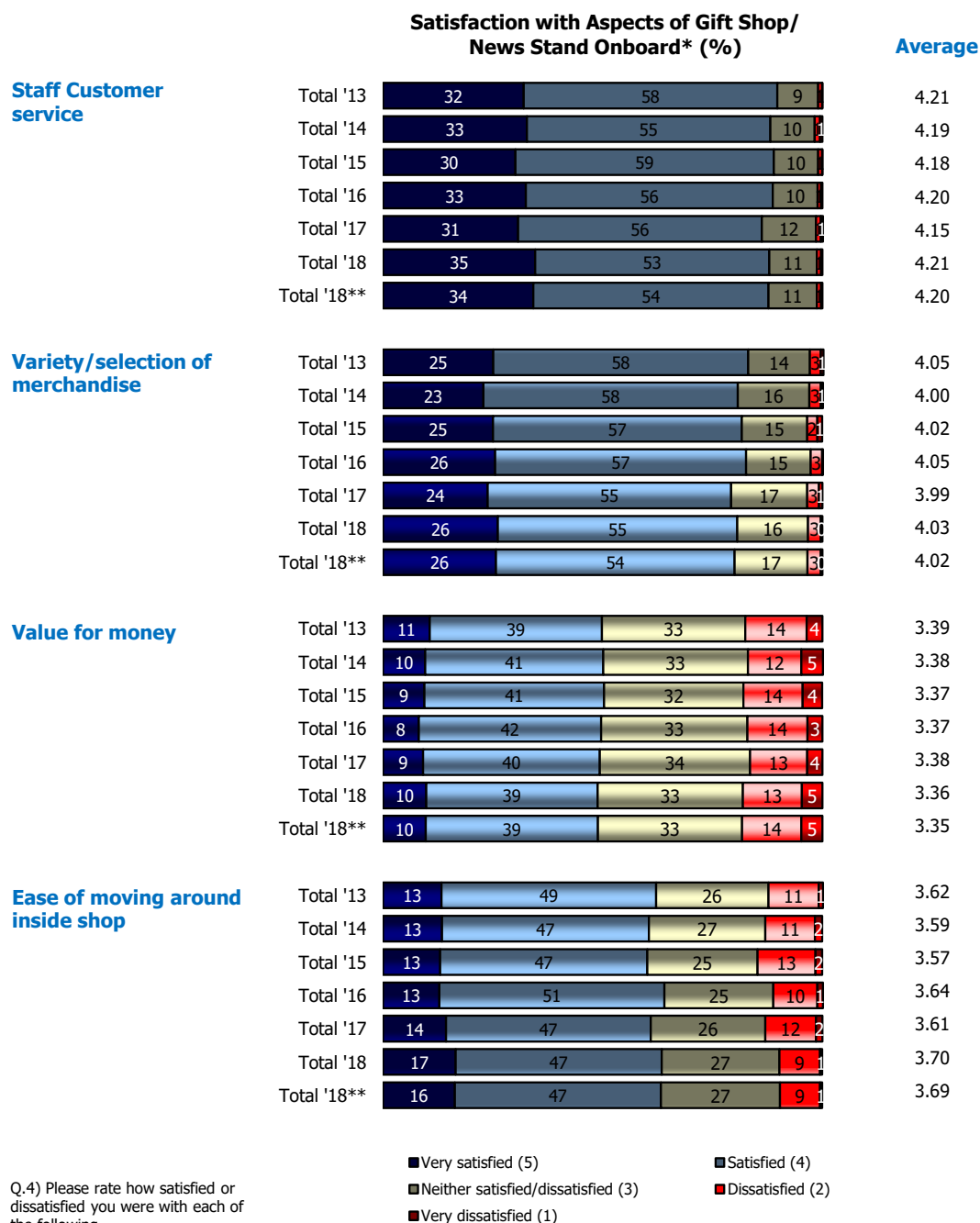
**Includes 5 additional routes



Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

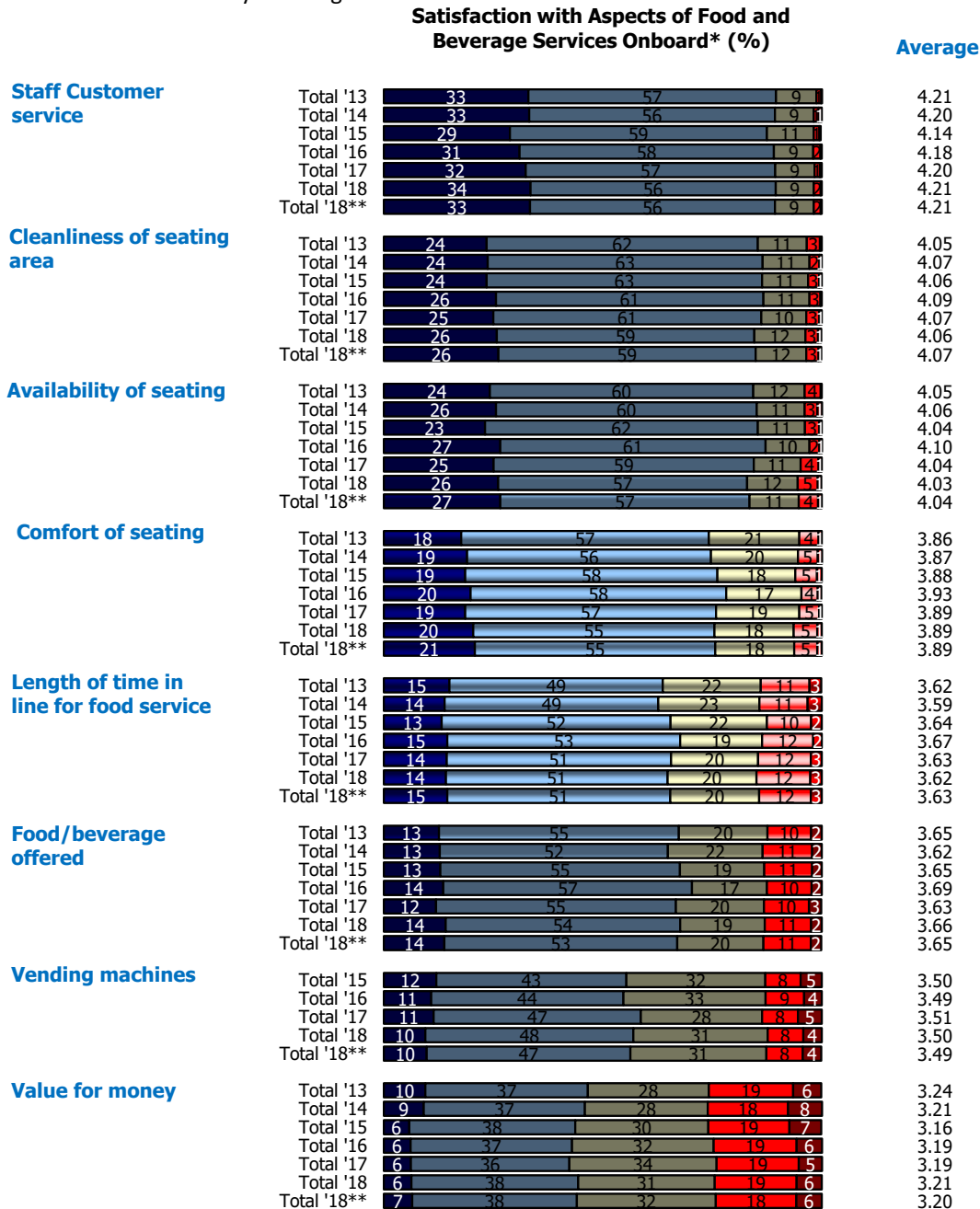
Onboard Gift Shop/ News Stand

Increases are reported for *staff customer service* (4.15 to 4.21) and *ease of moving around inside the shop* (3.61 to 3.70).



Onboard Food Services

Following decreases reported in 2017, average scores have stabilized this year for *availability of seating* and for *food/ beverages offered*. Results for all other onboard food service aspects measured are basically unchanged.



Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

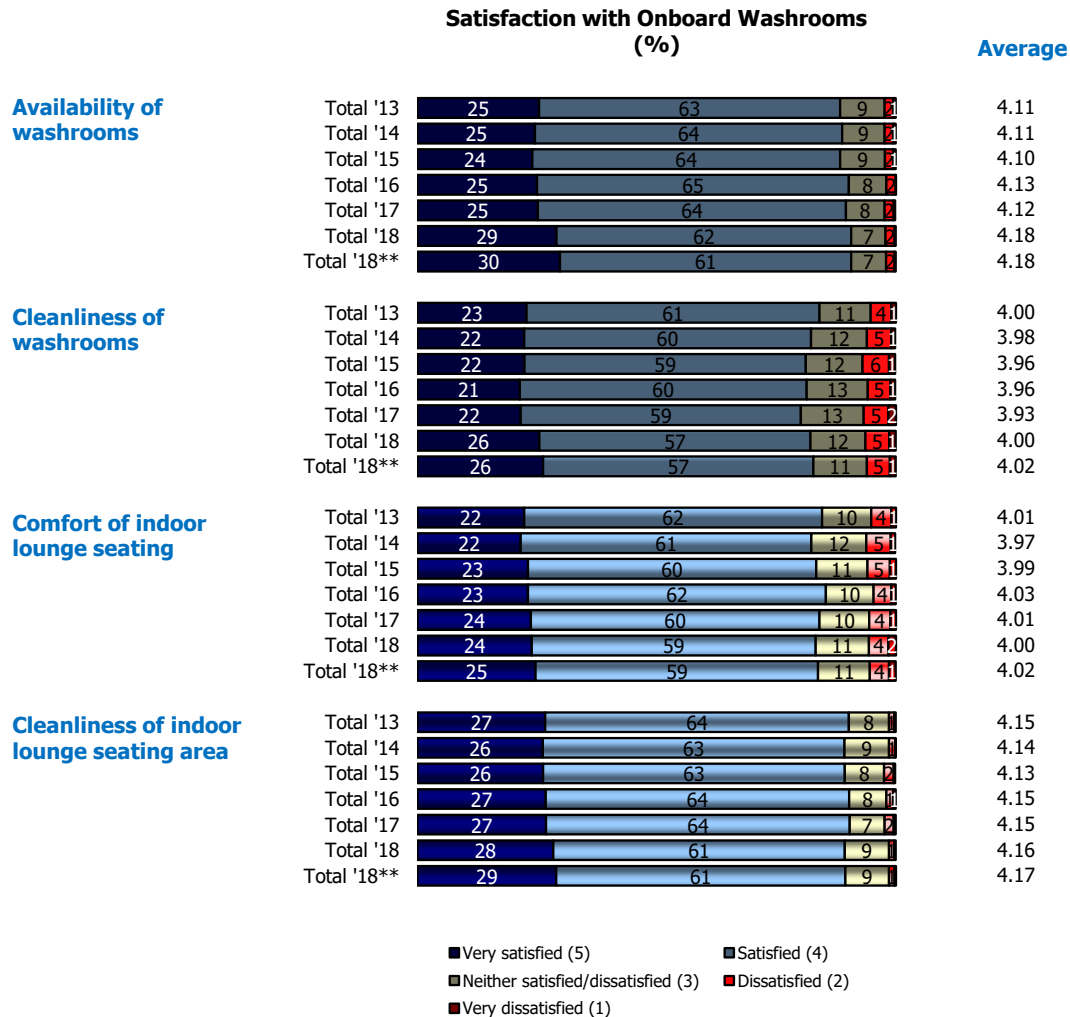
*Usage: 70% food & beverage services, 21% vending machines
 **Usage: 68% food & beverage service, 22% vending machines
 (Excludes Routes 4, 12, 18, 19, 23)

**Includes 5 additional routes

■ Very satisfied (5) ■ Satisfied (4)
 ■ Neither satisfied/dissatisfied (3) ■ Dissatisfied (2)
 ■ Very dissatisfied (1)

Onboard Washrooms and Onboard Seating

Following a slight decrease in 2017, the average score for *availability of washrooms* has improved from 4.12 to 4.18, and an increase is also registered for *cleanliness of washrooms* (3.93 to 4.00). No changes are reported in satisfaction with onboard seating.

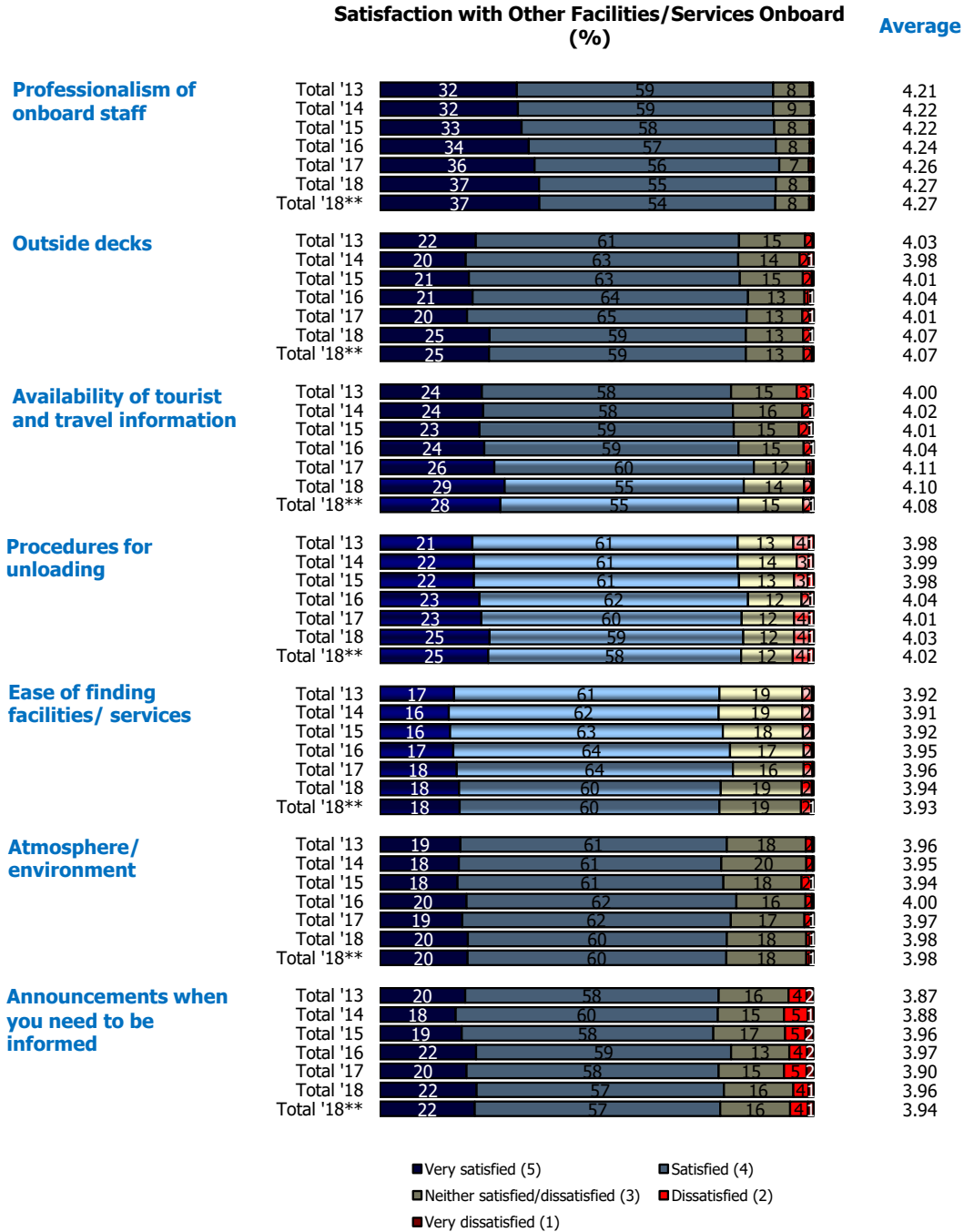


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

Other Onboard Facilities/ Services

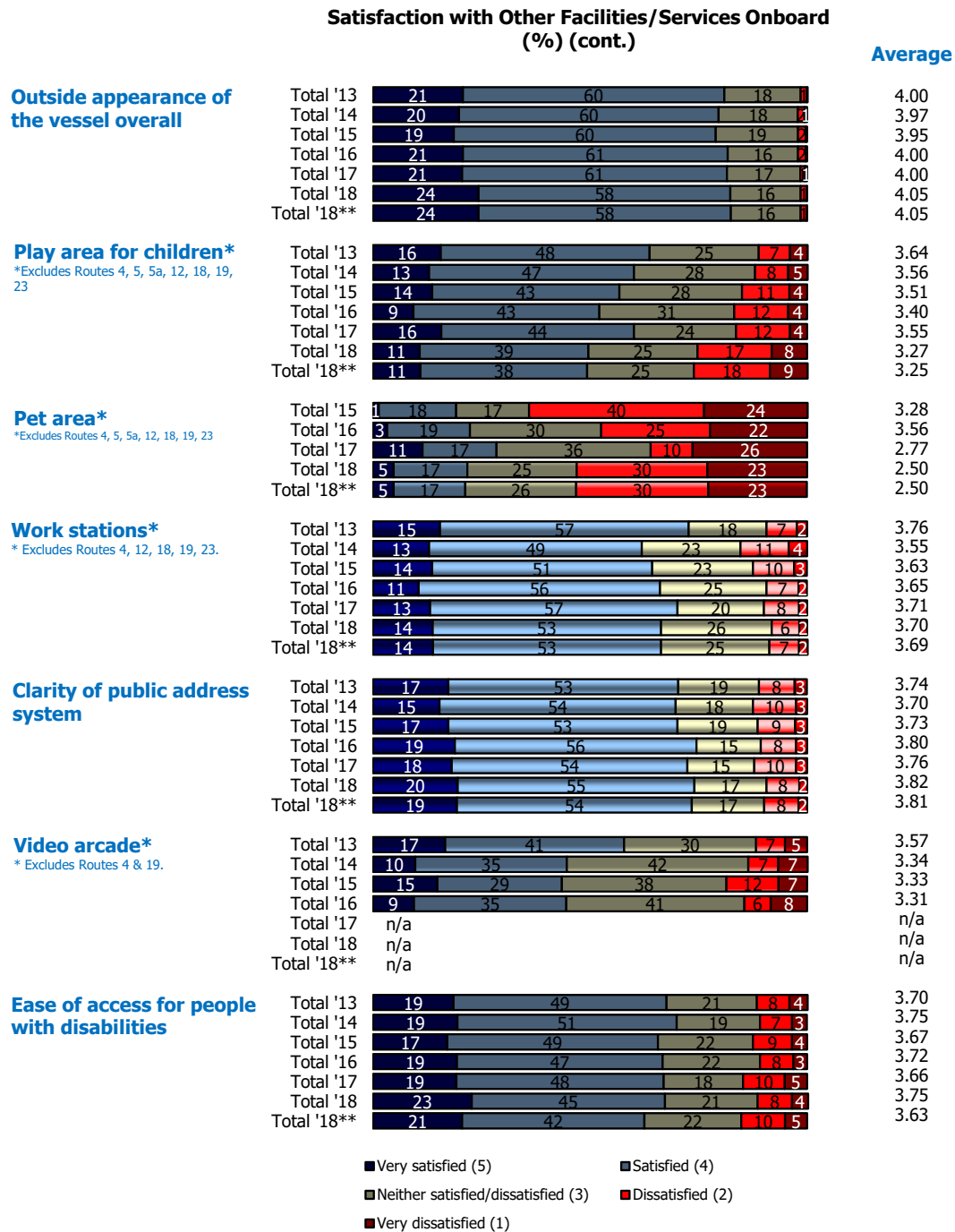
The average satisfaction score for *outside decks* has increased and stands at 4.07, an all-time high. Average satisfaction continues to fluctuate for *announcements when you need to be informed* (this year increasing from 3.90 to 3.96).



Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

While an improvement is registered for *outside appearance of the vessel overall* (from 4.00 to 4.05), fluctuations continue for *clarity of public address system* (increasing from 3.76 to 3.82 this year), and for *ease of access for people with disabilities* (improving from 3.66 to 3.75).



Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

*Usage: 10% play area for children; 2% pet area

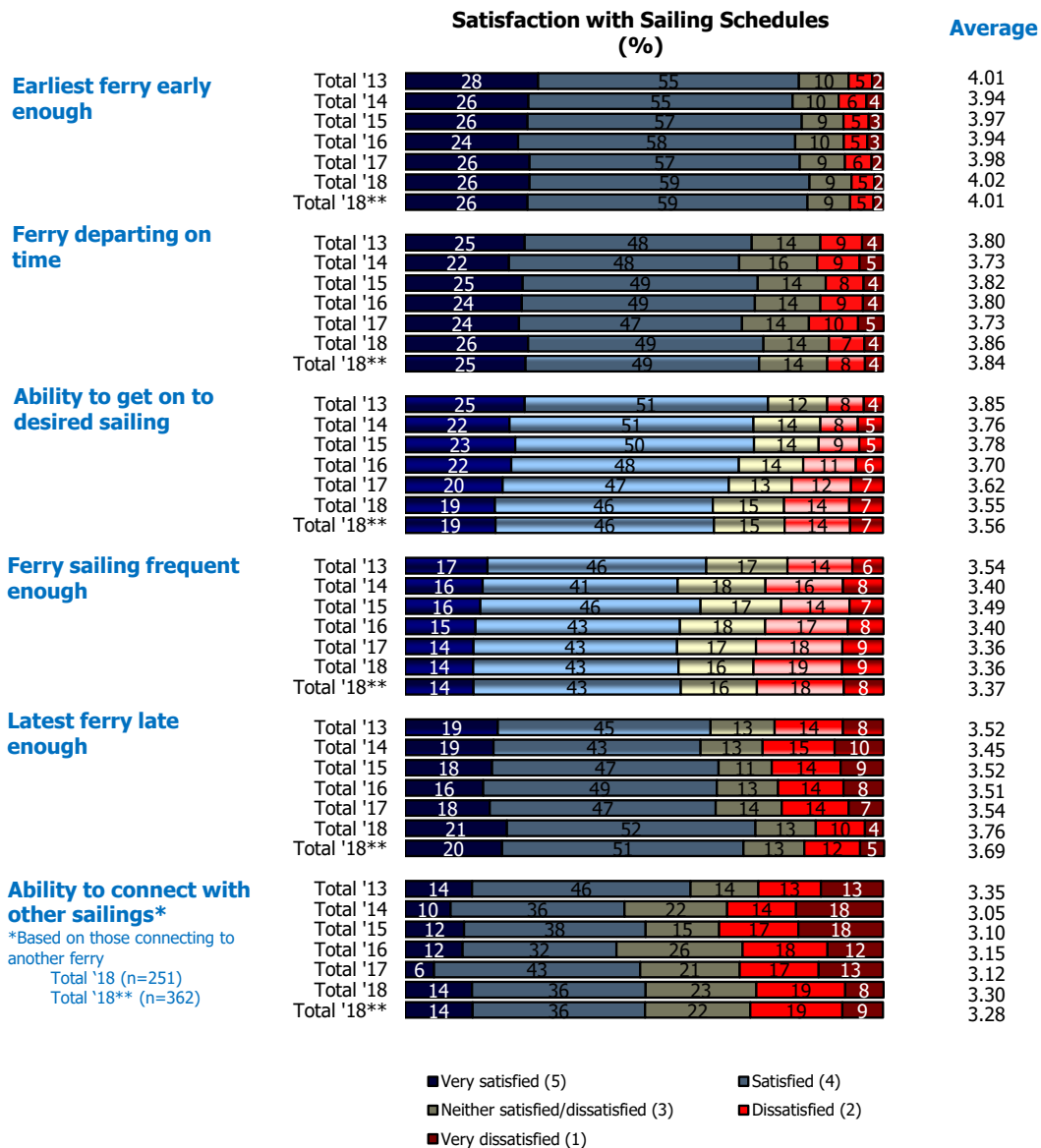
**Usage 10% play area for children; 2% pet area

**Includes 5 additional routes

Sailing Schedules

Various Aspects of Sailing Schedules

The decline continues in average score for the *ability to get onto desired sailing* (from 3.62 in 2017 to 3.55 this year). Following a decrease to 3.73 in 2017, the result for *ferry departing on time* has rebounded to 3.86 this measure. Note as well the significant improvement for *latest ferry late enough* (from 3.54 last year to 3.76 currently), likely a result of changes to sailing schedules.



Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

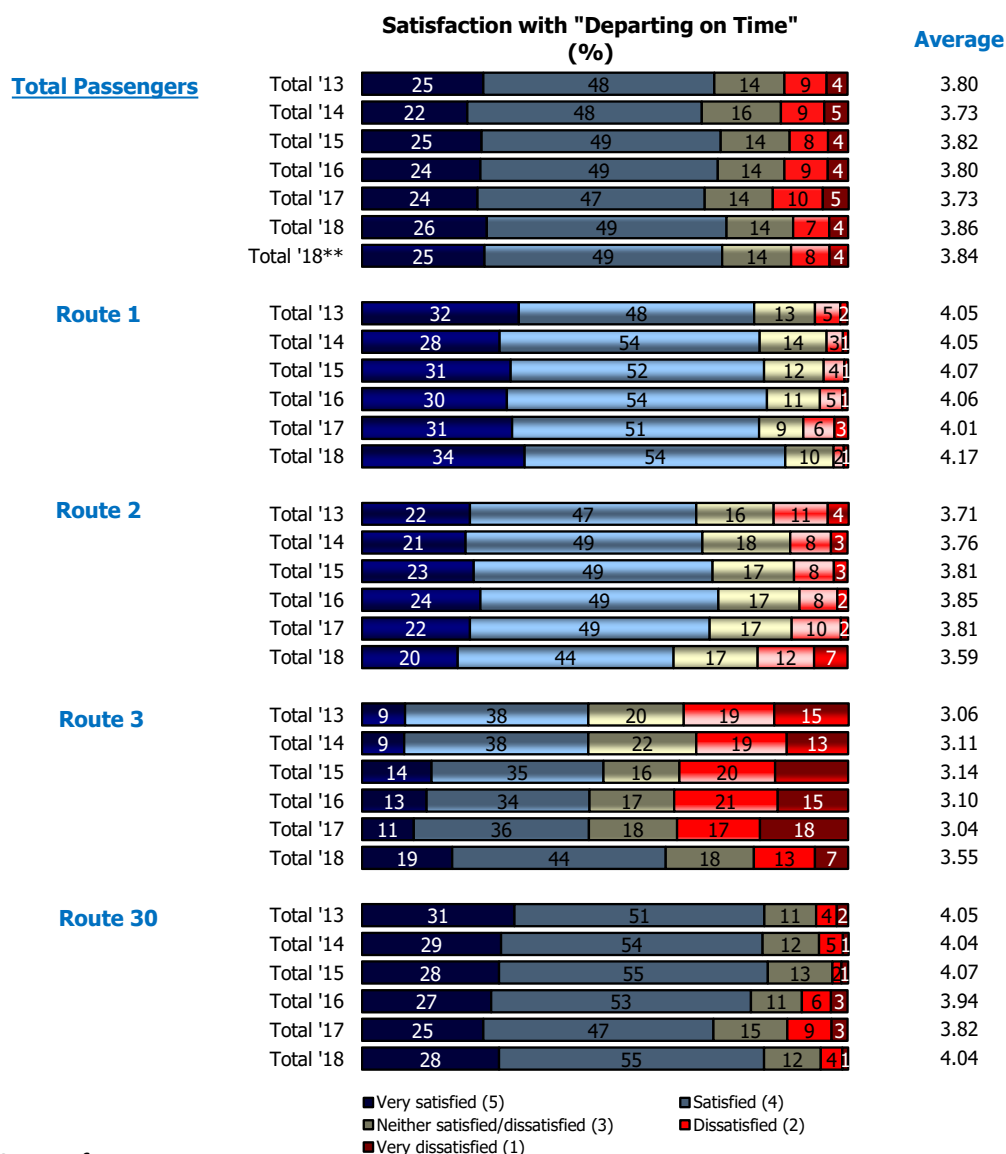
**Includes 5 additional routes

Departing on Time

The following chart details the ratings for “departing on time” by route. While Route 2 has sharply declined from a 3.81 in 2017 to a 3.59 average (supported by actual departure delays for this route increasing to an 11 minute average this year compared to the 6 minutes in 2017), significant improvements are noted on the following:

- Route 1 – 4.17 compared to 4.01 in 2017;
- Route 3 – 3.55 vs 3.04;
- Route 30 – 4.04 vs. 3.82;
- South Gulf Island routes 5/9 – 3.82 vs. 3.60.

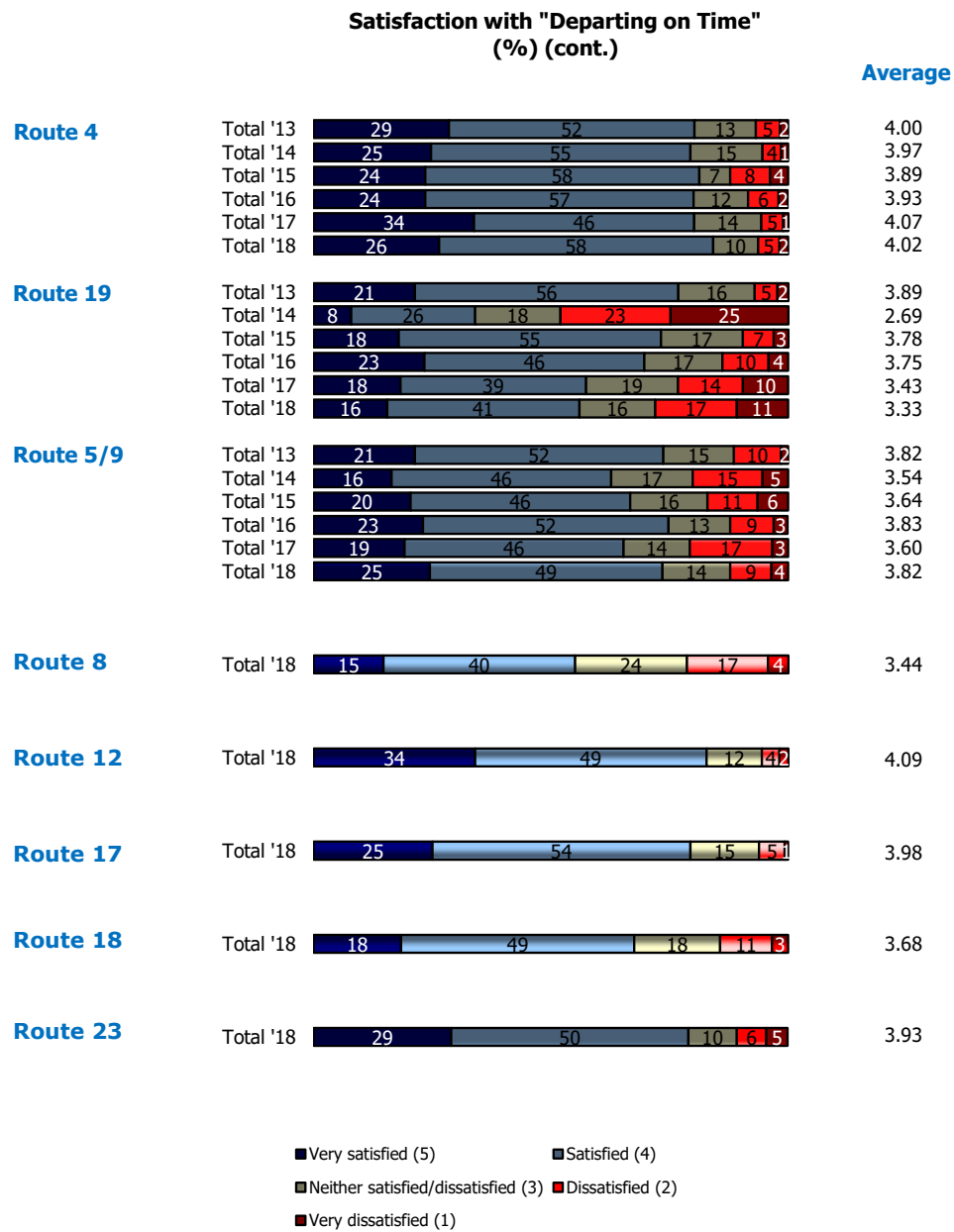
Decreases in actual departure delay times for these four routes are likely to have made an impact.



[NOTE: Refer to page 7
or page 35 for route
descriptions]

Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

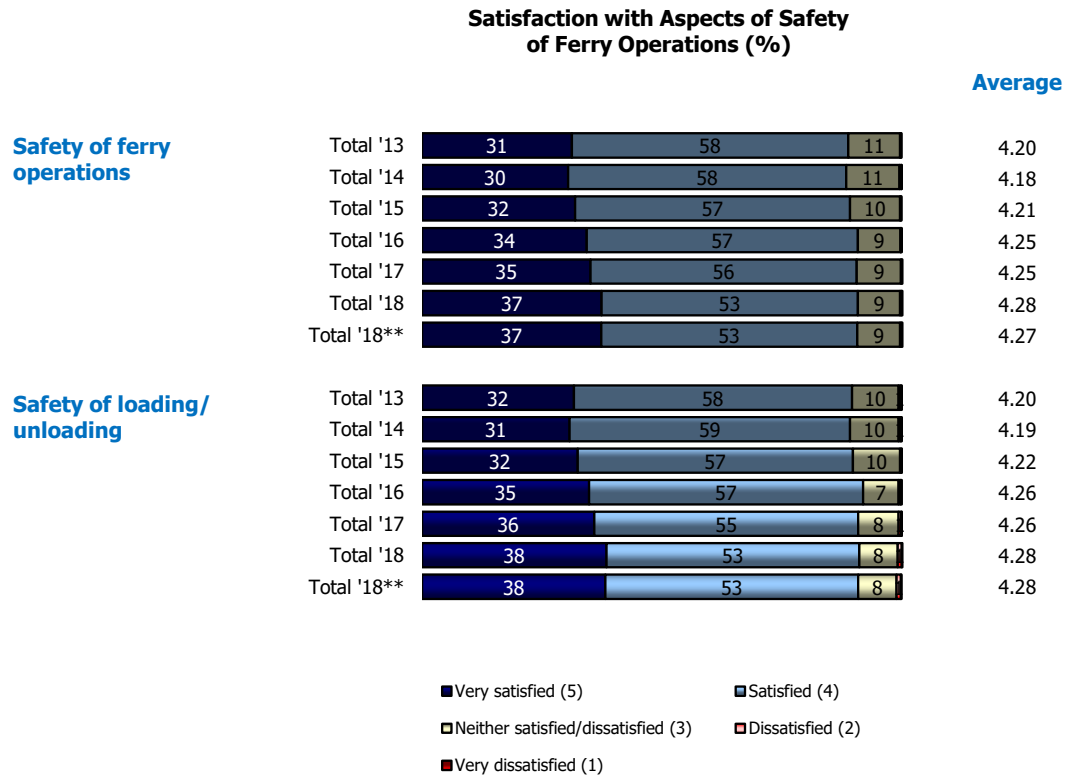
**Includes 5 additional routes



Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Safety

A minor increase is reported for *safety of ferry operations* (4.25 to 4.28).

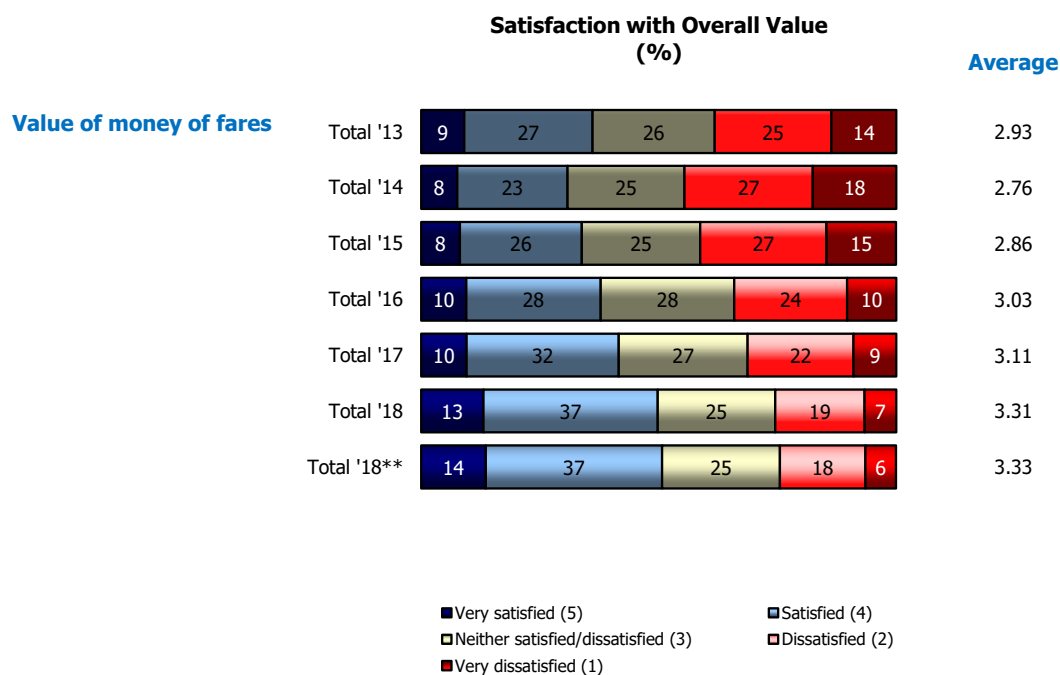


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

Overall Value

The average satisfaction score for the overall *value for money of fares* stands at 3.31, increasing for the fourth year in a row and representing an all-time high. The implementation of a fare freeze and the Sunrise/ Sunset fare promotion on major routes, plus fare reductions on minor routes and the reinstatement of free travel for seniors are likely contributors.



Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

**Includes 5 additional routes

Appendices

Route-by-Route Satisfaction Score for Each Attribute

BC Ferries Routes Included in Customer Satisfaction Survey – 2018	
Route No.	Description of Route
Route 1	Tsawwassen – Swartz Bay
Route 2	Horseshoe Bay – Departure Bay
Route 3	Horseshoe Bay – Langdale
Route 30	Tsawwassen – Duke Point
Route 4	Swartz Bay – Fulford Harbour, Salt Spring Island
Route 19	Departure Bay – Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 8	Bowen – Horseshoe Bay
Route 12	Brentwood Bay – Mill Bay
Route 17	Powell River – Comox
Route 18	Texada Island – Powell River
Route 23	Campbell River – Quadra Island

NOTE: Combined these routes represent approximately 80% of the annual passenger traffic volume on BC Ferries.

Average Satisfaction Ratings by Route – All Waves 2018																
	Total	Total**	Larger Routes				Route 3	Smaller Routes								
			Total	1	2	30		Total	4	19	5/9	8	12	17	18	23
OVERALL EXPERIENCE																
Trip overall	4.22	4.22	4.24	4.32	4.13	4.21	4.18	4.18	4.28	4.03	4.24	4.22	4.47	4.19	4.19	4.28
BEFORE ARRIVING AT TERMINAL																
Usefulness of BC Ferries website	4.09	4.08	4.12	4.11	4.13	4.10	4.05	4.02	4.11	4.05	3.98	3.95	4.23	4.11	4.02	3.82
Ease of using online reservations	3.95	3.95	3.99	4.00	3.99	3.96	3.85	3.83	-	-	3.83	-	-	3.82	-	-
Usefulness of BC Ferries phone service	3.36	3.32	3.48	3.63	3.40	3.19	2.87	3.35	3.43	3.51	3.30	3.04	3.57	3.18	3.25	2.85
Ease of using automated phone system	3.15	3.12	3.24	3.46	3.01	2.96	2.80	3.10	3.25	3.24	3.03	2.88	3.47	3.05	2.99	2.95
Highway signage	4.05	4.05	4.08	4.12	4.05	4.06	3.91	4.04	-	-	4.04	-	-	3.77	-	-
TERMINAL EXPERIENCE																
Terminal overall	4.05	4.05	4.10	4.13	4.04	4.13	3.89	4.02	4.03	3.85	4.12	3.88	4.02	4.05	4.03	4.22
Outside appearance of the terminal	4.04	4.04	4.11	4.11	4.10	4.11	3.85	3.97	3.95	3.80	4.08	3.84	3.87	4.08	4.13	4.17
Ticket Purchase																
Efficiency of the transaction	4.40	4.40	4.42	4.42	4.46	4.36	4.31	4.4	4.43	4.34	4.42	4.39	4.47	4.31	4.43	4.53
Staff customer service	4.43	4.42	4.44	4.44	4.45	4.40	4.35	4.45	4.43	4.41	4.49	4.34	4.57	4.25	4.41	4.62
Clarity of staff directions	4.41	4.40	4.43	4.45	4.45	4.35	4.34	4.40	4.34	4.36	4.44	4.15	4.52	4.31	4.33	4.49
Food & Beverage Services at the Terminal																
Food beverages offered	3.58	3.57	3.65	3.64	3.69	3.61	3.35	3.39	2.92	-	3.54	3.30	-	3.50	-	-
Vending machines	3.38	3.35	3.49	3.59	3.37	3.40	3.23	2.90	2.69	2.83	3.05	3.12	-	3.34	3.22	3.15
Value for money	3.10	3.10	3.15	3.21	3.10	3.04	2.93	3.05	2.87	3.01	3.13	3.14	-	2.93	3.11	3.02
Gift Shop/ News Stand at the Terminal																
Variety/ selection of merchandise	3.87	3.85	3.91	3.94	3.89	3.87	3.83	3.45	3.11	-	3.55	3.20	-	3.67	-	-
Value for money	3.35	3.34	3.36	3.42	3.35	3.22	3.34	3.20	2.92	-	3.30	3.13	-	3.17	-	-
Outdoor Market Area at the Terminal																
Variety/ selection of merchandise	3.49	3.48	3.57	3.64	3.40	3.64	3.06	3.60	3.53	-	3.64	3.36	-	3.11	-	-
Value for money	3.29	3.29	3.35	3.45	3.11	3.37	3.01	3.33	3.36	-	3.31	3.31	-	2.99	-	-
Play area for children	3.81	3.79	3.84	3.90	-	3.70	-	3.66	3.59	-	3.71	-	-	3.19	-	-
Pet area	3.30	3.30	3.23	3.32	-	3.01	-	3.55	3.43	-	3.60	-	-	3.20	-	-
Other Terminal Services																
Clarity of public address system	3.69	3.67	3.74	3.70	3.78	3.78	3.54	3.66	3.68	3.61	3.67	3.34	3.89	3.68	-	-
Announcements when you need to be informed	3.86	3.84	3.91	3.89	3.92	3.96	3.71	3.78	3.82	3.64	3.83	3.55	4.02	3.84	3.95	3.88
Overall look & décor inside terminal	3.87	3.85	3.92	3.90	3.95	3.91	3.66	3.89	3.78	-	3.94	3.55	-	3.80	-	-
Availability of washrooms	4.10	4.09	4.14	4.17	4.08	4.15	4.01	4.02	4.08	3.92	4.06	4.00	3.91	4.06	4.09	4.16
Cleanliness of washrooms	3.98	3.98	4.02	4.06	3.92	4.08	3.86	3.97	4.05	3.84	4.02	3.75	3.88	4.07	4.19	4.15
Procedures for loading	4.08	4.06	4.13	4.16	4.08	4.16	3.88	4.04	4.11	3.92	4.09	3.77	4.28	4.05	4.06	4.20
Professionalism of terminal staff	4.25	4.25	4.28	4.29	4.27	4.24	4.12	4.27	4.25	4.20	4.31	4.06	4.48	4.23	4.29	4.47

**Includes 5 additional routes

continued

Average Satisfaction Ratings by Route – All Waves 2018																	
	Total	Total**	Larger Routes				Route 3	Smaller Routes									
			Total	1	2	30		Total	4	19	5/9	8	12	17	18	23	
Foot Passenger Services at the Terminal																	
Usefulness of TV info screens	3.75	3.74	3.76	3.75	3.73	3.85	3.70	3.72	3.72	-	-	3.62	-	3.54	-	-	
Availability of parking spaces	3.55	3.48	3.75	3.68	3.72	4.05	3.13	3.18	2.72	2.40	4.01	2.96	2.84	3.95	-	-	
Parking value for money	3.01	2.99	2.91	2.97	2.79	2.94	3.13	3.34	2.89	3.57	3.33	2.66	3.46	3.73	-	-	
Ease of using passenger drop-off/ pick-up area	3.98	3.98	4.06	4.17	3.89	4.01	3.92	3.69	3.84	3.01	4.11	3.79	3.22	3.99	4.10	4.20	
Availability of seating in pre- boarding lounge at terminal	3.73	3.77	3.71	3.65	3.75	3.92	3.78	3.71	3.93	3.46	3.73	3.70	3.30	3.68	4.10	4.26	
Comfort of seating in pre-boarding lounge at terminal	3.61	3.62	3.65	3.61	3.66	3.85	3.57	3.48	3.76	3.17	3.53	3.63	3.18	3.31	3.53	3.80	
Cleanliness of pre-boarding lounge	3.99	4.00	4.02	3.95	4.08	4.18	3.93	3.94	4.12	3.77	3.95	3.86	3.79	3.90	4.20	4.25	
ONBOARD EXPERIENCE																	
Onboard overall	4.16	4.16	4.18	4.22	4.13	4.14	4.11	4.12	4.14	4.01	4.17	4.12	4.33	4.12	4.10	4.22	
Gift Shop/ News Stand																	
Variety/ selection of merchandise	4.03	4.02	4.04	4.05	4.07	3.97	4.05	3.81	-	-	3.81	3.71	-	3.77	-	-	
Staff customer service	4.21	4.20	4.21	4.19	4.24	4.22	4.20	4.22	-	-	4.22	4.13	-	4.05	-	-	
Ease of moving around inside shop	3.70	3.69	3.73	3.78	3.66	3.70	3.62	3.45	-	-	3.45	3.82	-	3.52	-	-	
Value for money	3.36	3.35	3.37	3.43	3.31	3.31	3.33	3.31	-	-	3.31	3.41	-	3.15	-	-	
Food Services																	
Length of time in line for food services	3.62	3.63	3.60	3.59	3.61	3.65	3.59	3.85	-	-	3.85	3.93	-	3.75	-	-	
Food/ beverages offered	3.66	3.65	3.70	3.67	3.72	3.72	3.57	3.47	-	-	3.47	3.45	-	3.60	-	-	
Staff customer service	4.21	4.21	4.21	4.20	4.23	4.21	4.18	4.23	-	-	4.23	4.09	-	4.22	-	-	
Availability of seating	4.03	4.04	4.00	3.98	3.97	4.14	4.08	4.18	-	-	4.18	4.19	-	4.23	-	-	
Comfort of seating	3.89	3.89	3.88	3.89	3.84	3.94	3.90	3.88	-	-	3.88	3.99	-	3.99	-	-	
Cleanliness of seating area	4.06	4.07	4.07	4.02	4.10	4.14	4.02	4.13	-	-	4.13	4.14	-	4.26	-	-	
Vending machines	3.50	3.49	3.55	3.60	3.43	3.58	3.55	3.08	2.68	-	3.25	3.53	-	3.60	-	3.25	
Value for money	3.21	3.20	3.23	3.28	3.19	3.17	3.15	3.06	2.62	-	3.14	3.29	-	3.14	-	3.05	
Washrooms																	
Availability of washrooms	4.18	4.18	4.19	4.21	4.17	4.20	4.13	4.13	4.03	3.93	4.27	4.21	4.22	4.34	4.01	4.27	
Cleanliness of washrooms	4.00	4.02	4.03	4.07	3.94	4.04	3.90	4.02	3.88	3.79	4.18	4.10	4.05	4.35	4.08	4.16	
Lounge Seating																	
Comfort of indoor lounge seating	4.00	4.02	4.01	4.05	3.94	4.02	4.07	3.83	3.42	3.58	4.10	4.16	3.59	4.21	3.58	4.21	
Cleanliness of indoor lounge seating area	4.16	4.17	4.16	4.16	4.14	4.22	4.17	4.13	3.92	3.90	4.31	4.19	3.92	4.29	4.14	4.23	

**Includes 5 additional routes

continued

Average Satisfaction Ratings by Route – All Waves 2018																
	Total	Total**	Larger Routes				Route 3	Smaller Routes								
			Total	1	2	30		Total	4	19	5/9	8	12	17	18	23
Other Onboard Facilities/ Services																
Play area for children	3.27	3.25	3.43	3.69	3.19	3.19	2.77	3.09	-	-	3.09	3.37	-	2.88	-	-
Pet area	2.50	2.50	2.50	2.58	2.51	2.20	2.21	3.29	-	-	3.29	2.16	-	2.70	-	-
Video arcade	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Work stations	3.70	3.69	3.72	3.76	3.60	3.82	3.57	3.94	-	-	3.94	3.31	-	4.01	-	-
Outside decks	4.07	4.07	4.12	4.18	4.04	4.04	3.97	3.96	3.93	3.80	4.11	3.98	4.07	4.13	4.10	4.13
Outside appearance of the vessel overall	4.05	4.05	4.09	4.19	3.95	4.02	3.92	4.03	3.99	3.84	4.17	4.03	4.08	4.28	3.86	3.98
Availability of tourist and travel information	4.10	4.08	4.16	4.17	4.16	4.15	4.02	3.85	3.80	3.33	4.09	3.89	3.53	4.05	3.56	3.99
Ease of access, overall, for people with disabilities	3.75	3.63	3.86	3.93	3.77	3.88	3.63	3.39	3.39	2.97	3.65	3.19	3.18	3.75	2.54	2.94
Ease of finding facilities/ services	3.94	3.93	3.96	3.96	3.93	3.99	3.88	3.91	3.79	3.75	4.04	3.87	3.98	4.08	3.70	3.91
Clarity of public address system	3.82	3.81	3.86	3.79	3.91	3.96	3.75	3.74	3.65	3.58	3.86	3.61	3.96	3.97	3.66	3.57
Announcements when you need to be informed	3.96	3.94	3.99	3.96	4.01	4.08	3.87	3.87	3.84	3.71	3.96	3.72	4.05	4.02	3.80	3.78
Atmosphere/ environment	3.98	3.98	4.00	4.01	3.96	4.06	3.91	3.94	3.90	3.74	4.08	3.96	4.08	4.10	3.97	3.94
Procedures for unloading	4.03	4.02	4.07	4.10	4.02	4.08	3.90	4.01	4.06	3.92	4.04	3.87	4.30	4.05	4.02	3.96
Professionalism of onboard staff	4.27	4.27	4.29	4.31	4.27	4.27	4.16	4.29	4.27	4.25	4.31	4.17	4.47	4.29	4.32	4.36
Experience with the Sailing Schedule																
Earliest ferry earliest enough	4.02	4.01	4.05	4.03	4.04	4.09	4.07	3.85	4.00	3.65	3.89	4.05	3.62	3.68	4.10	3.97
Latest ferry late enough	3.76	3.69	3.80	3.82	3.69	3.94	3.80	3.58	3.24	3.74	3.65	3.54	2.61	3.57	2.79	3.03
Ferry sailing frequent enough	3.36	3.37	3.55	3.80	3.27	3.33	2.77	3.14	3.29	3.12	3.08	3.72	3.16	3.09	2.98	3.54
Ability to get onto desired ferry	3.55	3.56	3.63	3.77	3.46	3.54	3.23	3.59	3.65	3.18	3.80	3.66	3.46	3.76	3.44	3.42
Ability to connect with other sailings (based on those connecting)	3.30	3.28	3.18	3.15	3.04	3.78	3.69	3.17	3.52	2.62	3.29	3.16	3.53	3.34	2.30	3.21
Ferry departing on time	3.86	3.84	3.96	4.17	3.59	4.04	3.55	3.72	4.02	3.33	3.82	3.44	4.09	3.98	3.68	3.93
Safety																
Safety of ferry operations	4.28	4.27	4.30	4.34	4.25	4.24	4.20	4.27	4.25	4.25	4.30	4.18	4.41	4.25	4.21	4.36
Safety of loading/unloading	4.28	4.28	4.31	4.36	4.27	4.23	4.18	4.28	4.27	4.25	4.30	4.17	4.45	4.27	4.21	4.28
OVERALL VALUE																
Value for money of fares	3.31	3.33	3.24	3.32	3.17	3.09	3.45	3.50	3.50	3.40	3.55	3.68	3.92	3.10	3.46	3.38

**Includes 5 additional routes

TERMINAL ATTRIBUTES ONLY									
Satisfaction Ratings by Terminal – All Waves 2018									
	Total	Total**	Terminals						
			Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Fulford Harbour
OVERALL EXPERIENCE									
Trip overall	4.22	4.22	4.23	4.38	4.14	4.12	4.22	4.29	4.22
TERMINAL EXPERIENCE									
Terminal overall	4.05	4.05	4.15	4.10	3.94	4.12	3.87	4.15	3.97
Outside appearance of the terminal	4.04	4.04	4.14	4.06	3.95	4.19	3.82	4.12	3.94
Ticket Purchase									
Efficiency of the transaction	4.40	4.40	4.41	4.40	4.37	4.47	4.39	4.41	4.40
Staff customer service	4.43	4.42	4.44	4.43	4.36	4.49	4.41	4.42	4.35
Clarity of staff directions	4.41	4.40	4.45	4.41	4.37	4.46	4.41	4.34	4.34
Food & Beverage Services at the Terminal									
Food beverages offered	3.58	3.57	3.76	3.45	3.47	3.78	3.37	3.43	3.10
Vending machines	3.38	3.35	3.53	3.50	3.26	3.39	3.28	3.46	2.90
Value for money	3.10	3.10	3.17	3.18	2.92	3.21	3.03	2.97	3.13
Gift Shop/ News Stand at the Terminal									
Variety/ selection of merchandise	3.87	3.85	3.96	3.84	3.86	3.94	3.75	3.84	3.54
Value for money	3.35	3.34	3.34	3.40	3.29	3.44	3.37	3.28	3.51
Outdoor Market Area at the Terminal									
Variety/ selection of merchandise	3.49	3.48	3.61	3.68	3.24	3.44	2.98	3.50	3.69
Value for money	3.29	3.29	3.41	3.43	3.10	3.09	2.91	3.45	3.54
Play area for children	3.81	3.79	3.81	3.84	-	-	-	3.81	3.82
Pet area	3.30	3.30	3.45	3.07	-	-	-	3.03	2.99
Other Terminal Services									
Clarity of Public address system	3.69	3.67	3.76	3.62	3.64	3.81	3.58	3.87	3.69
Announcements when you need to be informed	3.86	3.84	3.92	3.83	3.79	3.96	3.75	4.08	3.87
Overall look & décor inside terminal	3.87	3.85	3.95	3.83	3.80	4.04	3.58	3.86	3.78
Usefulness of TV info screens	3.75	3.74	3.63	3.88	3.68	3.78	3.75	4.01	3.78
Availability of washrooms	4.10	4.09	4.13	4.20	4.01	4.14	4.02	4.19	4.02
Cleanliness of washrooms	3.98	3.98	4.03	4.08	3.83	3.96	3.96	4.21	4.09
Procedures for loading	4.08	4.06	4.12	4.17	3.95	4.12	3.92	4.29	4.14
Professionalism of terminal staff	4.25	4.25	4.25	4.29	4.17	4.29	4.17	4.36	4.27
Foot Passenger Services at the Terminal									
Availability of parking spaces	3.55	3.48	3.69	3.68	3.5	3.72	2.97	4.18	2.36
Parking value for money	3.01	2.99	2.91	2.99	2.95	2.76	3.26	3.13	2.72
Ease of using passenger drop-off/ pick-up area	3.98	3.98	4.00	4.28	3.75	4.07	4.12	4.01	3.57
Availability of seating in pre-boarding lounge at terminal	3.73	3.77	3.64	3.72	3.63	4.11	3.72	4.08	3.75
Comfort of seating in pre-boarding lounge at terminal	3.61	3.62	3.65	3.60	3.60	3.76	3.47	3.98	3.73
Cleanliness of pre-boarding lounge	3.99	4.00	3.96	3.98	3.94	4.18	3.96	4.29	4.05
OVERALL VALUE									
Value for money of fares	3.31	3.33	3.23	3.38	3.31	3.13	3.47	3.07	3.55

**Includes 5 additional routes continued

TERMINAL ATTRIBUTES ONLY Satisfaction Ratings by Terminal – All Waves 2018												
			Terminals									
	Total	Total**	Bowen Island	Nanaimo Harbour	Gabriola	Brentwood Bay	Mill Bay	Powell River	Comox	Texada Island	Campbell River	Quadra Island
OVERALL EXPERIENCE												
Trip overall	4.22	4.22	4.24	4.06	3.98	4.41	4.53	4.22	4.17	4.17	4.36	4.21
TERMINAL EXPERIENCE												
Terminal overall	4.05	4.05	3.83	4.02	3.64	4.12	3.91	4.16	3.94	3.94	4.25	4.19
Outside appearance of the terminal	4.04	4.04	3.82	3.95	3.61	4.09	3.62	4.27	3.95	3.91	4.18	4.17
Ticket Purchase												
Efficiency of the transaction	4.40	4.40	4.31	4.36	4.31	4.49	4.44	4.44	4.22	4.33	4.59	4.45
Staff customer service	4.43	4.42	4.28	4.43	4.39	4.61	4.53	4.36	4.19	4.33	4.70	4.52
Clarity of staff directions	4.41	4.40	4.04	4.36	4.37	4.58	4.46	4.38	4.25	4.22	4.63	4.33
Food & Beverage Services at the Terminal												
Food beverages offered	3.58	3.57	3.11	-	-	-	-	3.56	3.44	-	-	-
Vending machines	3.38	3.35	2.90	2.85	2.78	-	-	3.38	3.22	3.24	3.34	2.98
Value for money	3.10	3.10	3.00	2.81	3.18	-	-	3.03	2.84	3.21	3.10	2.97
Gift Shop/ News Stand at the Terminal												
Variety/ selection of merchandise	3.87	3.85	3.20	-	-	-	-	3.71	3.63	-	-	-
Value for money	3.35	3.34	2.98	-	-	-	-	3.35	3.01	-	-	-
Variety/ selection of merchandise	3.49	3.48	3.08	-	-	-	-	3.35	2.93	-	-	-
Value for money	3.29	3.29	3.12	-	-	-	-	3.26	2.82	-	-	-
Play area for children	3.81	3.79	-	-	-	-	-	3.30	3.10	-	-	-
Pet area	3.30	3.30	-	-	-	-	-	3.07	3.49	-	-	-
Other Terminal Services												
Clarity of Public address system	3.69	3.67	3.21	3.58	3.64	3.94	3.85	3.77	3.60	-	-	-
Announcements when you need to be informed	3.86	3.84	3.38	3.60	3.67	4.07	3.97	3.95	3.78	3.85	4.00	3.79
Overall look & décor inside terminal	3.87	3.85	3.44	-	-	-	-	4.03	3.58	-	-	-
Usefulness of TV info screens	3.75	3.74	3.50	-	-	-	-	3.57	3.50	-	-	-
Availability of washrooms	4.10	4.09	3.92	4.01	3.81	4.06	3.78	4.13	3.99	4.13	4.07	4.23
Cleanliness of washrooms	3.98	3.98	3.75	3.85	3.81	4.11	3.68	4.23	3.95	4.12	4.06	4.23
Procedures for loading	4.08	4.06	3.69	3.96	3.86	4.27	4.30	4.12	4.00	3.93	4.24	4.16
Professionalism of terminal staff	4.25	4.25	4.00	4.17	4.24	4.49	4.47	4.30	4.18	4.22	4.53	4.41
Availability of parking spaces	3.55	3.48	2.92	2.70	2.15	3.13	2.66	3.61	4.21	-	-	-
Parking value for money	3.01	2.99	2.93	3.87	3.28	3.70	3.27	3.49	3.89	-	-	-
Ease of using passenger drop-off/ pick-up area	3.98	3.98	3.64	3.02	2.99	3.43	3.00	4.05	3.97	4.05	4.17	4.23
Availability of seating in pre-boarding lounge at terminal	3.73	3.77	3.53	3.69	3.24	3.48	3.14	4.04	3.38	4.04	4.26	4.27
Comfort of seating in pre-boarding lounge at terminal	3.61	3.62	3.35	3.25	3.08	3.37	3.00	3.58	3.03	3.46	3.73	3.88
Cleanliness of pre-boarding lounge	3.99	4.00	3.75	3.93	3.61	3.84	3.75	4.20	3.66	4.02	4.21	4.29
OVERALL VALUE												
Value for money of fares	3.31	3.33	3.64	3.41	3.38	3.94	3.90	3.28	3.05	3.34	3.47	3.30

**Includes 5 additional routes

Research Methodology

Background

British Columbia Ferry Services Inc. (BC Ferries) has commissioned tracking research to gauge customer satisfaction on specific BC Ferries Routes to determine and monitor areas of service that patrons believe are performing favourably and areas requiring improvement. Ultimately, this research will contribute to product and service enhancements for an improved service for BC Ferries travellers.

Project Overview

The 2003 Customer Satisfaction Tracking Study established a baseline for the newly formed B.C. Ferry Services Inc. and was designed to track performance on satisfaction levels overall and with specific service attributes during the following seasons: off-peak (June), peak (August) and shoulder (November). Reports are produced for each season and an annual report that combines results for the entire year. Each report will be published on the BC Ferries website as required by the Coastal Ferry Services Contract.

The study is designed to provide input to the Corporate Strategic Plan and to regular service and marketing plans.

Research Objectives

The specific objectives are as follows:

- Determine BC Ferries' customers' satisfaction levels overall with BC Ferries' service,
- Determine satisfaction with the specific attributes of the service,
- Uncover the relative importance of attributes,
- Measure satisfaction with attributes that span the entire range of points of customer contact with BC Ferries,
- Track changes in satisfaction over time, and across customer segments,
- Identify the critical improvements to the current service offering that will have the greatest impact on customer satisfaction,
- Ensure the tracking research is relevant and credible enough to pass internal and external scrutiny.

Quantitative Tracking Research

First, a random sample of passengers was intercepted onboard to collect key “screener” data including frequency of travel on BC Ferries, purpose of trip, area of residence, origin/ destination, and standard demographic questions. Each questionnaire also included coding of the route, the departure time, location of interview, the vessel name and any other information of value for analysis. This information was collected in the form of a “batch header”, which was attached to all the “screeners” completed on each sailing.

Immediately following this “screener”, passengers are given a longer follow-up survey to complete after they disembark and leave the terminal area. The method for returning the completed survey has been via a postage pre-paid envelope but starting in June 2015, this was modified to include the option to complete online. This is accomplished by adding a web survey address and unique survey code to the printed survey handed to passengers agreeing to participate. Respondents are instructed to complete the survey as to their preferred method (either on paper or online) within 48 hours of receiving it to ensure top-of-mind experiences are recorded.

This self-administered portion of the survey was designed to capture satisfaction and usage information from all potential points of contact for the *last* trip—from initial information requests, access to terminal, and ticket sales, to onboard, disembarking and post-travel experience. It included:

- an overall satisfaction measure
- service/facility attribute satisfaction ratings
- expenditure data
- problems encountered and responsiveness of personnel in resolving problems
- suggested changes or additions that would enhance the experience

The survey instrument was designed in full consultation with BC Ferries.

Sample Size

The total sample of placements was disproportionately distributed across larger and smaller routes to ensure a minimum number of interviews per route for reliability. In June 2015, and continuing since, minor reductions in sample sizes were applied to Route 4 and to the South Gulf Island routes, bringing their proportions more in line with actual passenger traffic while still maintaining statistical reliability. In 2018, five routes were added to the program, identified as **Added Routes 2018** within the table below.

Routes surveyed and the number of screeners and completed returned surveys from each route during this measure are as follows:

	All Waves 2018		All Waves 2018**	
	Screeners	Returns	Screeners	Returns
Route 1: Tsawwassen-Swartz Bay	1,638	685	1,638	685
Route 2: Horseshoe Bay-Departure Bay	1,410	683	1,410	683
Route 3: Horseshoe Bay-Langdale	1,211	597	1,211	597
Route 30: Tsawwassen-Duke Point	1,023	490	1,023	490
Route 4: Swartz Bay-Fulford Harbour, Saltspring Island	934	357	934	357
Route 19: Departure Bay-Descanso Bay, Gabriola Island	794	309	794	309
Route 5/9: Southern Gulf Islands	1,557	730	1,557	730
Added Routes - 2018				
Route 8: Bowen – Horseshoe Bay	-	-	825	346
Route 12: Brentwood Bay – Mill Bay	-	-	1,160	485
Route 17: Powell River – Comox	-	-	785	376
Route 18: Texada Island – Powell River	-	-	396	189
Route 23: Campbell River – Quadra Island	-	-	742	274
TOTAL	8,567	3,851*	12,475	5,521*

*Return method: 70% paper, 30% online

**Includes 5 additional routes

Sample Validation and Weighting

The data was weighted to bring them into their correct proportions, based on known statistics for the field period. Data was weighted to match actual passenger distribution:

- within each wave, by routes selected for surveying,
- within each route by daypart,
- within each route by weekday and weekend traffic, and
- by known BC Ferries traffic volume by wave

The weighting procedures have been professionally scrutinized and approved by a professional statistician specializing in transportation research.

The table following outlines the actual and weighted distributions of the sample.

Actual & Weighted Distribution of the Sample —All Waves 2018 —								
	All Waves '18				All Waves '18**			
	Screeners		Returns		Screener		Returns	
	Actual (8,567) %	Weighted (10,730) %	Actual (3,851) %	Weighted (4,805) %	Actual (12,475) %	Weighted (12,475) %	Actual (5,521) %	Weighted (5,514) %
Weekend by Route								
1	6	13	6	12	4	11	4	11
2	7	7	7	7	4	6	5	6
3	4	5	4	5	3	4	3	5
30	5	3	4	3	3	3	3	3
4	4	1	3	1	2	1	2	1
19	3	1	2	1	2	1	1	1
5/9	7	2	7	2	5	2	5	2
8	-	-	-	-	2	2	2	2
12	-	-	-	-	3	<1	2	<1
17	-	-	-	-	2	1	2	2
18	-	-	-	-	1	<1	1	1
23	-	-	-	-	2	1	1	1
Weekday by Route								
1	13	25	12	24	9	22	8	21
2	10	14	11	16	7	12	8	14
3	10	11	11	12	7	9	8	11
30	7	7	8	8	5	6	6	7
4	7	3	6	2	5	2	5	2
19	7	3	6	3	5	3	4	3
5/9	11	5	12	5	8	4	8	4
8	-	-	-	-	5	4	4	4
12	-	-	-	-	7	1	6	1
17	-	-	-	-	5	1	5	2
18	-	-	-	-	2	1	2	1
23	-	-	-	-	4	3	4	3
**Includes 5 additional routes								

Data Collection

The interviewers for this study were personal intercept staff who have completed rigorous training and are experienced with general public studies as well as business-to-business studies. A detailed briefing of interviewing staff was attended by the field director, supervisory staff and the project director.

So that a proper representation of ferry travellers was interviewed, interviewers were trained in the following techniques and randomization procedures, which were strictly adhered to:

- Passengers were approached as soon as they were seated and where necessary, minimum age verified (18 years and over).
- An interview with every 5th person was attempted.
- Passengers in small as well as large groups were approached; respondents were instructed to complete the survey individually, not as a group.
- All areas of the vessel were covered - cafeteria, snack bar, all lounge areas, outer decks and vehicle; interviewers moved to each of these areas every 15 minutes on major routes and every 5 minutes on minor routes.
- Both foot and vehicle passengers were approached.
- Where possible, and to correct for inherent bias of foot to vehicle passengers (foot passengers are first on and last off), interviewing was conducted on parking decks with vehicle passengers after the announcement signalling arrival to port.
- Interviewers were instructed not to accommodate patrons requesting a survey; however, if individuals were persistent a specially marked copy was provided allowing for its removal from the total.

Data Analysis

Senior coding staff was briefed on relevant information and nuances. Categories for open-end responses were developed under the guidance of the senior researcher and verification was performed by the coding supervisor.

The data entry system used for this study includes an internal edit, which is custom programmed. This immediate verification during the data entry process reduces entry errors and a further more detailed computer edit is performed after entry of the data.

For standard cross-tabulations, software designed expressly for marketing research was employed. Special editing and cleaning features of this database package ensure that the records are data entered and coded with accuracy. Further rigorous checks for inherent logic and consistency were performed prior to data tabulation.

Response Rate

The following outlines the response rates achieved in 2018.

Response Rates	
	<u>All Waves 2018</u>
Route 1	42%
Route 2	48%
Route 3	49%
Route 30	48%
Route 4	38%
Route 19	39%
Route 5/9	47%
Route 8	42%
Route 12	42%
Route 17	48%
Route 18	48%
Route 23	37%
Overall response	44%

Overall, the tolerance limits for this measure at the 95% level of confidence, based on the most conservative case (i.e., a statistic of 50%) are as follows:

Tolerance Limits – All Waves 2018				
	<u>Actual Sample Size All Waves '18</u>	<u>Approximate Tolerance Limits % Points</u>	<u>Actual Sample Size All Waves '18**</u>	<u>Approximate Tolerance Limits % Points</u>
Total Screeners	8,567	+/- 1.1 %	12,475	+/- 0.90 %
Total Returns	3,851	+/- 1.6 %	5,521	+/- 1.32 %
Individual Route Returns				
Route 1	685	+/- 3.7%	685	+/- 3.7%
Route 2	683	+/- 3.7%	683	+/- 3.7%
Route 3	597	+/- 4.0%	597	+/- 4.0%
Route 30	490	+/- 4.4%	490	+/- 4.4%
Route 4	357	+/- 5.2%	357	+/- 5.2%
Route 19	309	+/- 5.6%	309	+/- 5.6%
Route 5/9	730	+/- 3.6%	730	+/- 3.6%
Route 8	-	-	346	+/- 5.3%
Route 12	-	-	485	+/- 4.5%
Route 17	-	-	376	+/- 5.1%
Route 18	-	-	189	+/- 7.1%
Route 23	-	-	274	+/- 5.9%

**Includes 5 additional routes

Note on Data Rounding: Due to rounding up or down of percentages, the data presented on charts does not always match the findings reported in the analysis (e.g., a result of 21.5% would be rounded up to 22% on the charts).

