

Feedback and Engagement Report

Quarter ended March 31, 2018



Customer Feedback



Comment Summary

BC Ferries receives customer-initiated feedback through letters, emails, phone calls, tweets, Facebook posts and the online feedback form. Feedback tracked consists of a comment and an associated rating assigned either by the customer through the online feedback form or by BC Ferries on feedback received through other channels.

During Q4 Fiscal 2018, 4 million customers travelled with BC Ferries, as compared to 3.8 million in Q4 Fiscal 2017. During this period:

- A total of 1,990 comments were received, compared to 1,492 for the same period in the prior year, an increase of 33%
- The average time to respond to customers was 2.9 days compared to 4.5 days for Q4 Fiscal 2017
- Positive feedback made up 12% of all customer comments received
- The top five complaints represented 34% (683) of all comments received

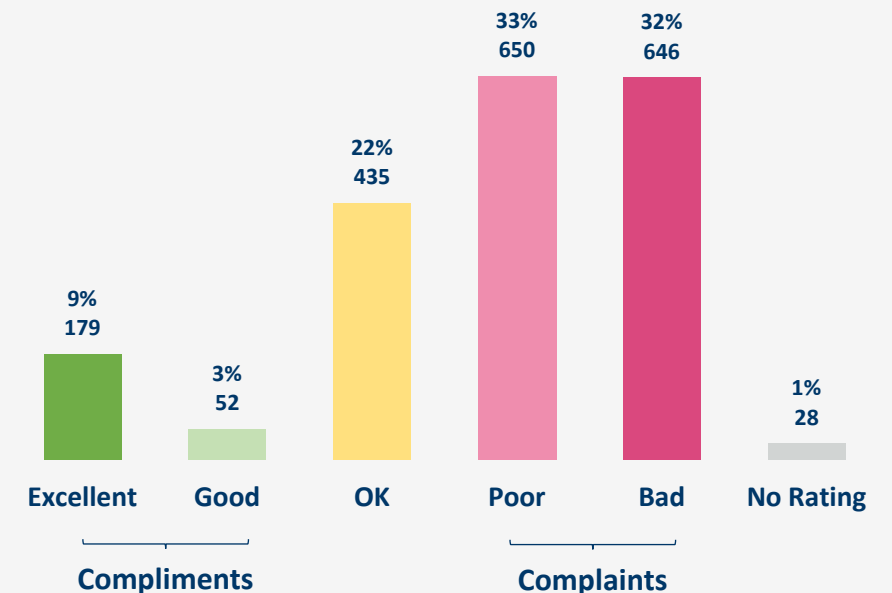
Comments in this analysis exclude General comments and comments for which no rating is provided:

- 175 General comments received made up of community issues (47), company information (106) and environment (22); 28 comments were provided with no rating

There were 1,787 comments used for further analysis as they were specific to a route or region.

Distribution of Total Comments by Rating

Total Comments = 1,990



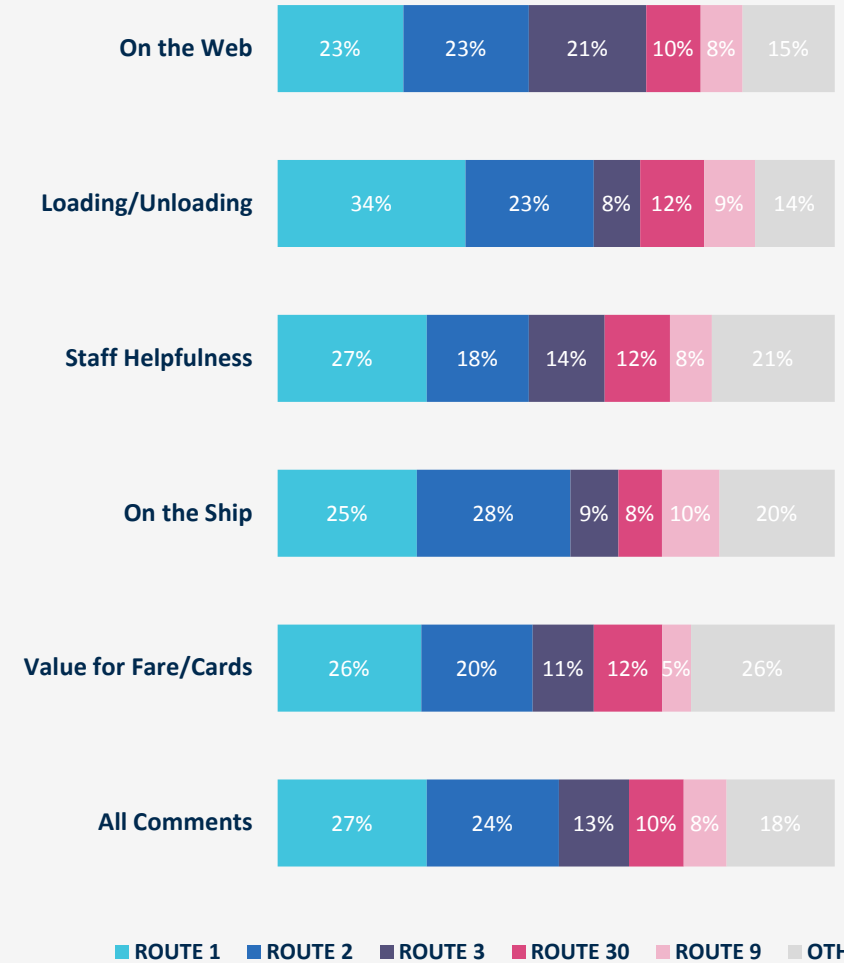
Top 5 Customer Complaints - System Wide

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=1236)*	% of Comments (n=1787)**	Complaints (n=952)*	% of Comments (n=1346)**
1	On the Web	231	12.9%	111	8.2%
2	Loading/Unloading	127	7.1%	77	5.7%
3	Staff Helpfulness	124	6.9%	96	7.1%
4	On the Ship	109	6.1%	68	5.1%
5	Value for Fare/Cards	92	5.1%	140	10.4%

% of Comments



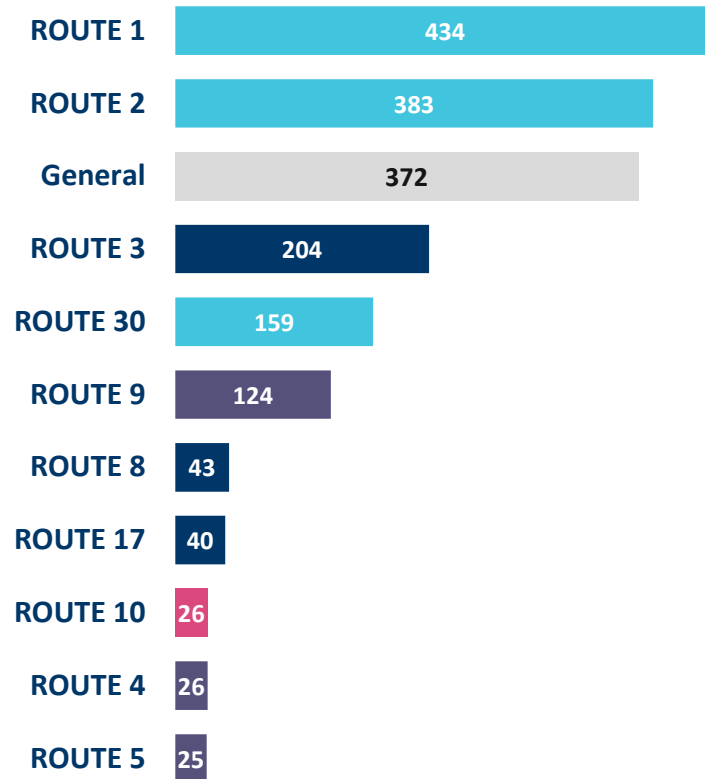
Comment Distribution by Route



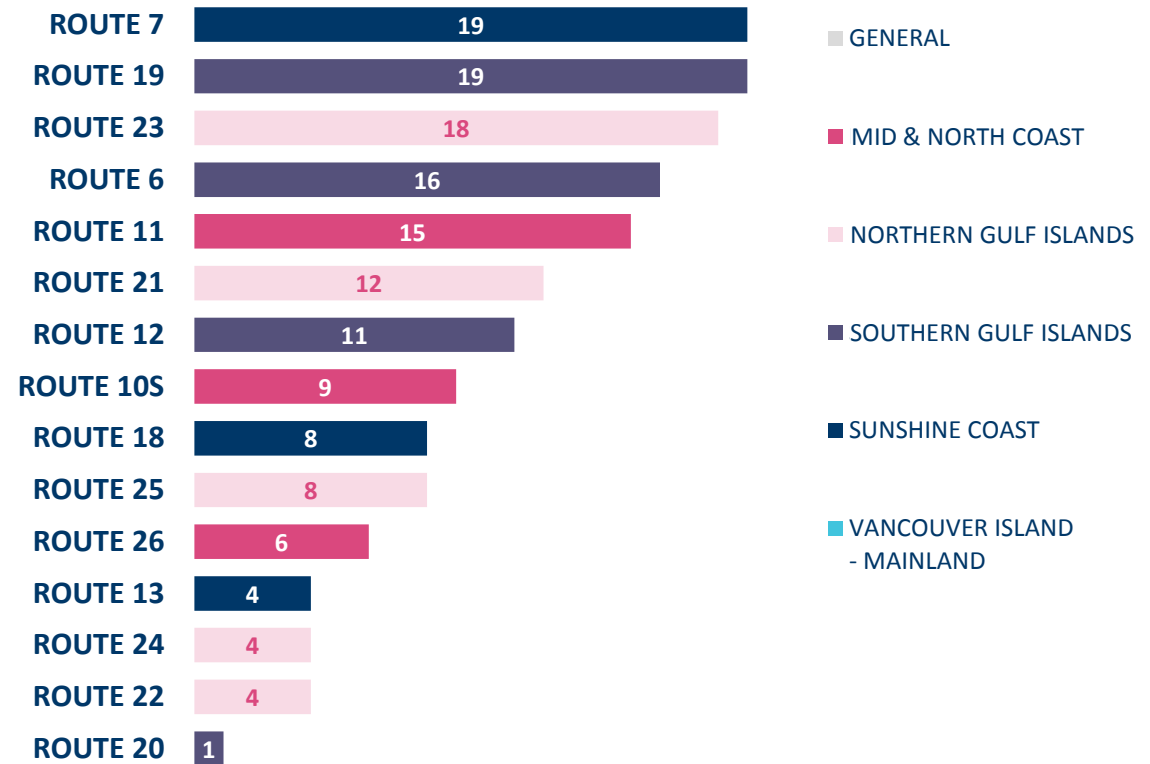
*Complaints = "bad" or "poor" rating accompanied by a comment
 **Excludes comments classified as General and comments with no rating provided

Overall System Wide Comments by Route

Routes with >20 Comments



Routes with <20 Comments



Note: Comments in this analysis include General comments and comments for which no rating was provided.

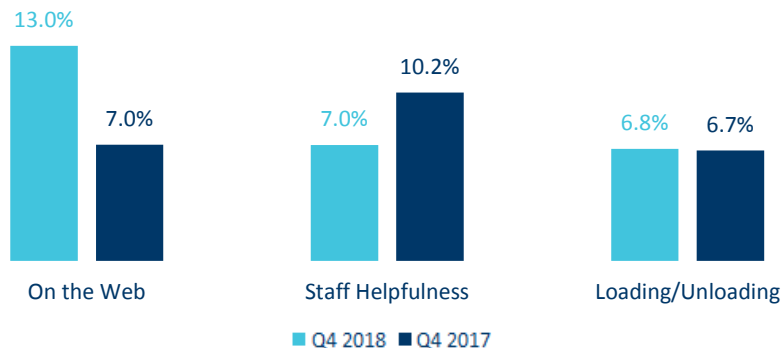
Regional Comments

Vancouver Island - Mainland:

50% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=617)*	% of Comments (n=900)*	Complaints (n=436)*	% of Comments (n=571)*
1	On the Web	117	13.0%	40	7.0%
2	Staff Helpfulness	63	7.0%	58	10.2%
3	Loading/Unloading	61	6.8%	38	6.7%

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



Sample Customer Comments

Complaints (617)

- Customer called to complain about being charged commercial fare when he is normally charged for a standard vehicle. He travels two to three times a week and has always been charged the same amount until today.
- Customer called upset that she was loaded far away from the elevator after telling the ticket agent she had mobility issues. The customer said that she was not able to get her wheelchair out of the vehicle.
- Customer called because she was unhappy that she was loaded on the lower vehicle deck after requesting to be on the upper deck, so she was not able to stay in her car with her pet.
- Customer wrote on Facebook: "Thanks for the smoking ban. It has pushed me, my family and our friends toward the seaplane which is a much better experience. Some people have high anxiety and stress and actually need a cigarette to calm themselves. Being on a ferry for an hour and a half plus waiting beforehand can seem like forever. It's sad that you have discriminated against those who smoke."
- Customer called because he thought the weekend he was trying to reserve for in May was sold out due to website reading "Full - Standby Only", when in fact, reservation space was not yet open to the public.

Compliments (104)

- Customer wrote: "A huge shout out to BC Ferries for helping us with a medical problem en route from Tsawwassen to Swartz Bay. We really appreciated the assistance of your helpful, well trained and empathetic crew. You were all amazing!"

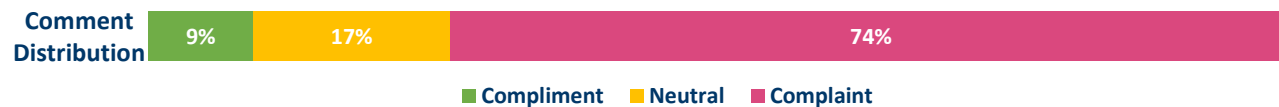
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Regional Comments Sunshine Coast:

17% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=223)*	% of Comments (n=303)*	Complaints (n=190)*	% of Comments (n=286)*
1	Loading/Unloading	34	11.2%	19	6.6%
2	Staff Helpfulness	27	8.9%	20	7.0%
3	On the Web	25	8.3%	27	9.4%

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



Sample Customer Comments

Complaints (223)

- Customer wrote: "Regarding the constant state of no parking available at the Langdale terminal, why on earth can you not use the giant overflow lot in the upper northwest corner? When people make the effort to leave their vehicles and 'walk on', parking should be a priority."
- Customer called to complain about the wait time to reach an agent in the Customer Service Centre. The customer claimed the wait reached 3.5 hours to make a reservation and was frustrated with the impact this has had in making vacation plans.
- Customer called to provide feedback that BC Ferries' website should provide more information about open booking dates and those sailings that are not available before going through almost all of the booking process, and before calling and waiting on hold.
- Customer called to complain about the new schedule between Horseshoe Bay and Langdale. He said that it affects children/students wanting to attend after-school activities and depending on the time of the activities, they may not get home until close to midnight.

Compliments (28)

- Customer wrote: "On a recent trip from Saltery Bay to Earl's Cove I overheard a conversation between a staff member and a passenger. Apparently there was a lady on the sailing who travels that route often and has dementia. According to the conversation, the staff keep a watchful eye on her to ensure her well-being. The lady was not named or in any way identified. I was impressed with the level of caring exhibited by your staff."

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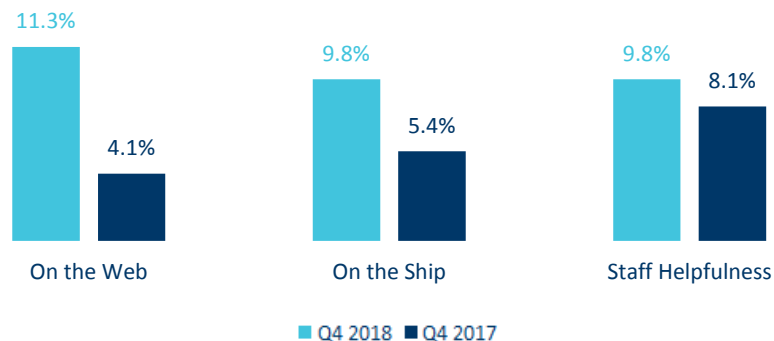
Regional Comments

Southern Gulf Islands:

11% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=153)*	% of Comments (n=204)*	Complaints (n=121)*	% of Comments (n=148)*
1	On the Web	23	11.3%	6	4.1%
2	On the Ship	20	9.8%	8	5.4%
3	Staff Helpfulness	20	9.8%	12	8.1%

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



Sample Customer Comments

Complaints (153)

- Customer wrote: "Why are you sounding your fog horns in Long Harbour multiple times when there is no fog. I'm not that concerned about our sleep, but our pets and the local wildlife are extremely stressed. I understand when there is fog, but we could see clearly today and the ferry was still sounding the fog horn."
- Customer called to change her reservation and was unhappy that she had to wait on hold and could not reserve as a foot passenger online.
- Customer called to complain how people with disabilities are treated at terminals since the closed vehicle deck became a passenger free zone. She feels that the questions BC Ferries' staff ask her are invasive and signage that is put on her vehicle to identify her as disabled is humiliating and outdated.
- Customer wrote: "The first sailing from Crofton this morning was 10 minutes late. We left at 7:45 am by my clock. This isn't the first time this has happened in the last few weeks."
- Customer called to make reservations for Easter Long Weekend and expressed his frustration: "You have noted on your website that it will be a busy time to travel and highly recommend reservations but your reservations aren't open for booking."

Compliments (20)

- Customer called to say how happy he was with his travels as a person with disabilities. He thanked BC Ferries staff, stating they were all well informed and very helpful, making his experience with BC Ferries pleasant and welcoming.
- Customer tweeted: "Thanks for all the guidance today, @BCFerries and your crews for getting us home safe and sound!"

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

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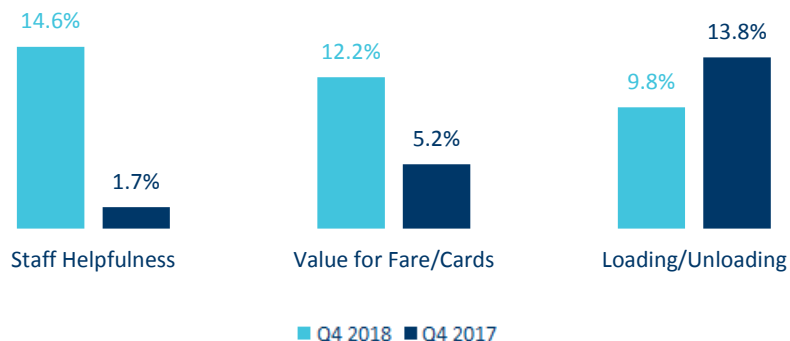
Regional Comments

Northern Gulf Islands:

2% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=35)*	% of Comments (n=41)*	Complaints (n=46)*	% of Comments (n=58)*
1	Staff Helpfulness	6	14.6%	1	1.7%
2	Value for Fare/Cards	5	12.2%	3	5.2%
3	Loading/Unloading	4	9.8%	8	13.8%

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



Sample Customer Comments

Complaints (35)

- Customer called frustrated that she showed up at 12:25 pm to travel on the 12:30 pm sailing from Campbell River to Quadra Island and due to windy conditions, the vessel departed five minutes early under the Captain's discretion. She found the decision to leave early very arbitrary. She stated that some people depend on that specific sailing, and leaving five minutes early does not make a difference to BC Ferries but makes a big difference to customers. She said BC Ferries should extend a higher amount of courtesy to the public.
- Customer wrote: "I've been harassed at the Quadra Island 8:00 am sailing three days in a row. I shut my vehicle off when it warms up. I am being told to shut it off now. The temperature is -2, -1, and +2 degrees. I realize it's policy but in the dead of winter, your worker could use a little common sense."
- Customer called to complain about not being loading on a sailing today. She travels between Buckley Bay and Denman Island regularly. She arrived before 6:40 am and the BC Ferries' crew member operating the gate stared at her and then proceeded to close the gate instead of letting her on the vessel.

Compliments (1)

- Customer called to compliment BC Ferries' staff working at Buckley Bay. She was travelling by bus and missed her stop at the terminal which would have meant missing her sailing entirely, if not for the crew and the bus driver going to incredible lengths to assist her. The crew were operating with a slight window for delay and managed to hold the vessel long enough for the bus driver to get her there for the sailing. She wanted to extend a big thank you the crew as this small gesture helped improve a very stressful and sad week for her.

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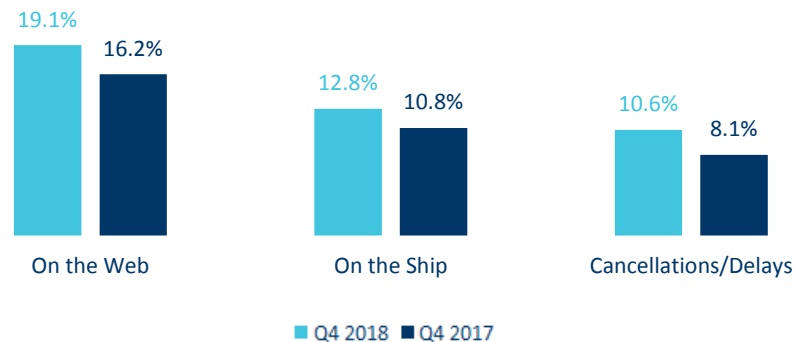
Regional Comments

Mid & North Coast:

3% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=38)*	% of Comments (n=47)*	Complaints (n=28)*	% of Comments (n=37)*
1	On the Web	9	19.1%	6	16.2%
2	On the Ship	6	12.8%	4	10.8%
3	Cancellations/Delays	5	10.6%	3	8.1%

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



Sample Customer Comments

Complaints (38)

- Customer was disappointed with the lack of information regarding amenities on BC Ferries' website. He was also upset that he could not reserve space in the vessel pet area.
- Customer called to complain she received notification saying the sailings from Skidegate Landing to Alliford Bay had been cancelled for the day. She later found out that the ferry did sail, however, did not receive any notification that the ferries would be running again.
- Customer wrote: "As a life long and now senior resident of BC, my wife and I entertained the idea of a round trip of lower central BC. Victoria to Port Hardy, BC Ferry to Prince Rupert and on from there. We have a small travel trailer and thought what a great adventure! 'Wrong'. When I priced the ferry fares I was stunned, it was about twice what I figured. What a shame a loyal frequent ferry rider and tax payer in his and her senior years can't afford a simple vacation in their own province. To think where we could go for that kind of money just doesn't make sense."

Compliments (3)

- Customer wrote regarding service they received while travelling the Inside Passage. Customer travels with elderly dogs and was so impressed with how helpful BC Ferries staff were, and how they assisted her in checking on the pets so she could deliver insulin to one that was diabetic. She mentioned that the entire crew were so friendly and helpful and really made the return trip most enjoyable and she wanted to share the positive feedback.

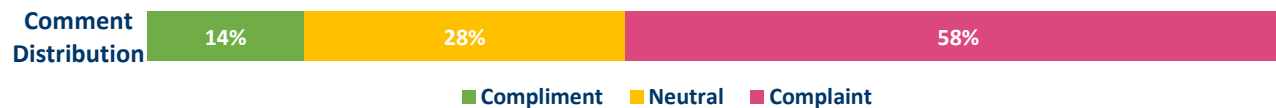
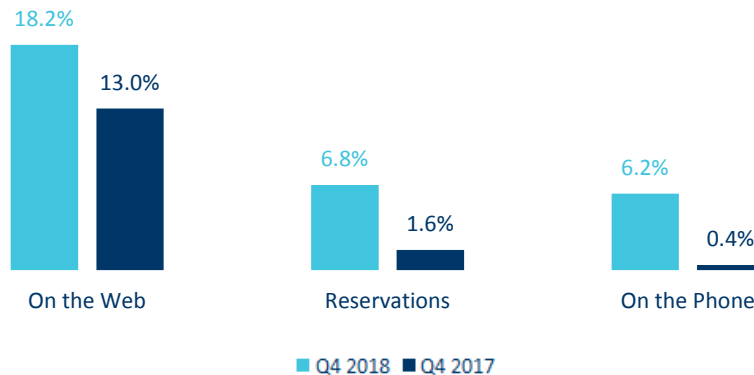
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Regional Comments General (No Route Specified):

16% of Total System Wide Comments Received

#	Complaint	Q4 Fiscal 2018		Q4 Fiscal 2017	
		Complaints (n=170)*	% of Comments (n=292)*	Complaints (n=131)*	% of Comments (n=246)*
1	On the Web	53	18.2%	32	13.0%
2	Reservations	20	6.8%	4	1.6%
3	On the Phone	18	6.2%	1	0.4%

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



Sample Customer Comments

Complaints (170)

- Customer called to complain about the “timeliness” of BC Ferries’ email notifications sent out to customers.
- Customer called to express disappointment and frustration with BC Ferries’ online system. Customer did not appreciate waiting 30 minutes on hold to add a passenger to their reservation when they should be able to self serve and add the passenger on their own.
- Customer called wondering why she could not make a reservation yet for the summer.
- Customer wrote: “Current wait time, 25 minutes. Actual wait time 65 minutes and counting.”

Compliments (40)

- Customer wrote: “As former residents of Vancouver Island and Galiano, we are very familiar with BC Ferries. We now live in Vancouver and over Christmas travelled to Vancouver Island. We were very impressed with the excellent directions and service provided by traffic directors at both terminals. Ships were very busy but onboard staff made it a smooth sailing experience. Thank you.”
- Customer wrote: “I strongly support your decision to make all BC Ferries’ ships and property ‘no smoking’ as of January 22, 2018. When anyone criticizes it, I remind them that this took effect for all other provincial properties in 2008 and BC Ferries is just catching up. I do have one suggestion to ease pressure on your crew members. To discourage smokers from lighting up there, I would do two things, make sure the doorway is brightly lit, and place a battery operated smoke alarm overhead.”

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

Comment Summary and Actions Taken

On the Web:

- **Vancouver Island - Mainland**
- **Sunshine Coast**
- **Mid and North Coast**
- **Southern Gulf Islands**
- **General**

Feedback received during Q4 Fiscal 2018 further suggests that BC Ferries' customers would prefer an online system that allows them to receive timely information regarding schedules and operational matters as well as permit them to reserve online with the choice whether or not to contact a Customer Service Centre agent by phone.

Customers expressed frustration when attempting to make summer vacation plans before reservations were available to be booked. Reservation space is typically opened six months in advance. Customers also became confused around the meaning of "full – standby only" wording on the reservations webpage. Many assumed that the reservations were full instead of not open to be booked for the dates requested. As soon as the issue was identified, a heading was added to the reservation page to read, "Scheduled sailings for the route and departure date you've requested are not available at this time. Please try again later."

Higher call volumes, staff attrition rate (due to opportunities in other departments), staff training and project demands related to technology upgrades contributed to negative feedback on longer than normal wait times to reach an agent. BC Ferries added 13 staff at the beginning of Q4 Fiscal 2018 and 48 more are in the process of being hired for peak season. During this period, BC Ferries also enhanced its customer communications by providing more frequent and detailed updates through its existing channels, including meeting with Ferry Advisory Committee members about service interruptions affecting their region.

BC Ferries has prioritized issues to be addressed and is in the process of implementing two key business strategies – the Fare Flexibility and Revenue Management Strategy and the Digital Experience Strategy – which together will modernize how BC Ferries sets pricing, sells travel and manages capacity utilization of sailings. The BC Ferries website is being replaced with a new e-commerce site with commercial strength and multi-channel, secure e-commerce software. Successful delivery of the Digital Experience Strategy will allow BC Ferries to continuously deliver timely communications, products and services through mobile devices and social channels. Both systems will be consistent with industry standards in design and usability. Core elements of the new website will be delivered by the end of Fiscal 2019.

Loading/Unloading:

- **Vancouver Island – Mainland**
- **Sunshine Coast**
- **Northern Gulf Islands**

The loading and allocation of vehicles on BC Ferries' vessels has become more complex due to upper vehicle deck loading requests (as a result of the Transport Canada Regulation) and increased traffic volumes. There are a variety of factors taken into account when loading a BC Ferries vessel: elevator access requests for those with mobility challenges, reservations, upper vehicle deck requests, medical requirements, weight distribution, tide levels, weather conditions and optimal use of vehicle deck space. When at the terminal ticket booth, customers may request to be loaded on the upper vehicle deck if space is available. Where space is not available, customers have the choice of being loaded on the lower vehicle deck or waiting for the following sailing.

BC Ferries openly communicates with customers in all aspects of its loading procedures including the reasoning behind allocation of vehicles on the vessel. Feedback is monitored closely, issues are identified and reviewed with terminal and vessel teams so that the customer's travel experience continues to improve.

Comment Summary and Actions Taken

Staff Helpfulness:

- Vancouver Island – Mainland
- Sunshine Coast
- Northern Gulf Islands
- Southern Gulf Islands

Communication issues, ticketing errors, misunderstandings, inappropriate behaviour by employees and call wait times can lead to customer dissatisfaction. The types of issues vary depending on route and range from general complaints on major routes to more personalized complaints on inter-island commuter routes stemming from familiarity with staff members.

BC Ferries identifies areas for improvement in customer service through ongoing customer feedback, complaints and suggestions received through all comment channels. Staffing needs must consistently be analyzed and adjusted to meet demand.

Over 71% of 'Staff Helpfulness' feedback comes from those customers travelling on routes serving Vancouver Island-Mainland and the Sunshine Coast. Complaints are reviewed and investigated on a case by case basis. Customers receive a response either in writing or verbally with an apology and an explanation of the policy or event. Every effort is made to avoid further confusion by clarifying misunderstandings of policy or procedure. Employee complaints are shared with the appropriate management team if deemed necessary for follow up with the employee.

Compliments are shared with the individual management team so that the employee may be recognized for their efforts. Social media channels and customer emails are monitored and responded to in a timely manner to keep up to date on emerging issues and trends. Of note, continued improvements in customer service are once again reflected in the number of staff compliments received for "On the Ship: Staff Helpfulness" and "On the Phone: Agent Helpfulness" where compliments exceed complaints.

On the Ship:

- Mid & North Coast
- Southern Gulf Islands

During Q4 Fiscal 2018, BC Ferries continued to receive feedback resulting from the Transport Canada regulation prohibiting passenger access to the closed/lower vehicle decks. Major pain points include customer requests for loading on the upper vehicle deck and lack of seating on the passenger decks on some vessels. There has been a decrease in complaints from commercial customers who, upon implementation, expressed their wish to stay in their vehicle in order to rest. Comments are primarily received from customers who request to be loaded on the upper vehicle deck or be provided an exemption to the regulation to remain in their vehicle due to a medical issue or travelling with a pet.

In order to decrease miscommunication regarding false loading expectations, BC Ferries has removed the use of the "orange card" that was previously provided to a customer at the ticket booth as an indicator of customers requesting to be loaded on the upper vehicle deck. The procedure was misunderstood by customers as it was perceived that it provided guaranteed placement on the upper vehicle deck when it was actually an indicator of acceptance to travel on the closed vehicle deck and not wait for the next available sailing. The card was also a safety concern as it created a distraction to customers and loading officers during the loading process.

Vessel improvement options related to passenger seating capacity and limited space in pet areas, for example, are taken into consideration during the vessel's annual refit. During refits, the *Queen of Oak Bay* and the *Queen of Surrey* received new pet areas and the *Queen of Oak Bay*, *Queen of Cowichan* and *Queen of Coquitlam* received temporary canvas enclosed heated solariums with padded seating, in February and March respectively.

BC Ferries' smoke free environment, implemented January 22, 2018, has been well received by customers. Customer feedback received was higher in Q3 Fiscal 2018, prior to implementation, with the announcement of the impending change which came out December 6, 2017. Negative feedback has been nominal with most customers expressing their appreciation for the change.

Comment Summary and Actions Taken

Value for Fare/Cards

- Northern Gulf Islands

BC Ferries receives customer feedback regarding fares as a result of the perception of value for fares paid, ticketing errors, confusion regarding Experience Card and Assured Loading Ticket use and policies, and in response to discount promotions.

During Q4 Fiscal 2018 two promotions were offered to customers in order to move traffic from peak times and alleviate congestion during the Holiday Season and Spring Break. “Holiday Savings” and “Spring Savings” offered 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, December 21, 2017 to January 3, 2018 and March 15, 2018 to April 3, 2018.

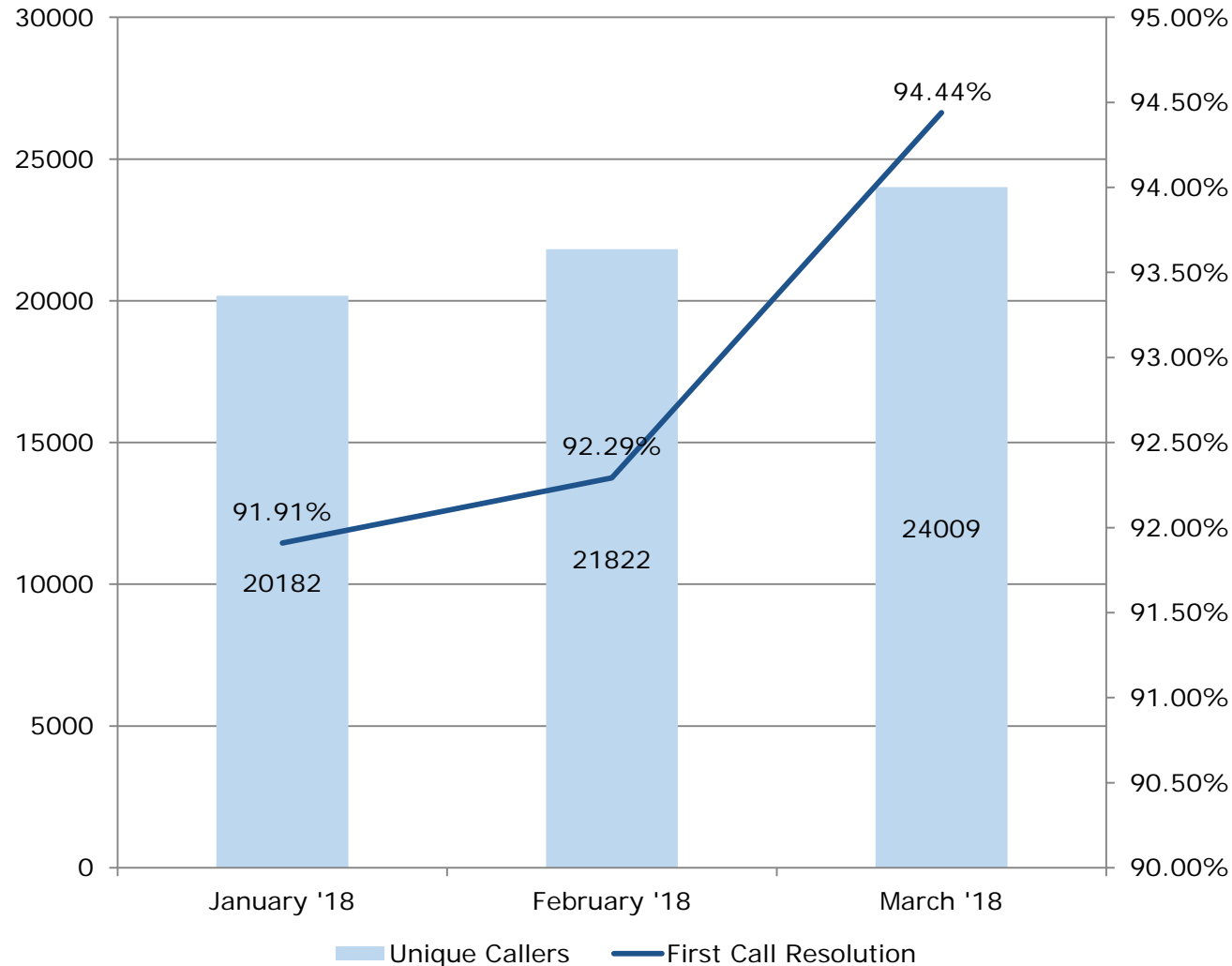
Customers who regularly travel inter-island routes and are eligible for year round discounts with use of the Experience Card, regularly express their displeasure that promotions are not available on all routes. Others perceive that they should have received the promotional fare when travelling and did not for various reasons.

On April 1, 2018 BC Ferries’ fares were frozen on major routes, lowered on inter-island routes by 15% and made free for seniors Mondays through Thursdays (with the exception of holidays). This was responded to positively by customers, with the exception of seniors who are not BC residents and, therefore, not eligible to participate in the government program. Experience Card discounted fares were also decreased by 15% and the price of Assured Loading Tickets frozen.

BC Ferries recognizes that fare affordability remains a priority to customers. BC Ferries continues to move towards providing customers with an enhanced fare structure that offers more choice, including discounts to travel at less popular times for the Metro Vancouver – Vancouver Island routes. In the meantime, BC Ferries’ promotions continue to prove successful in providing customers who have flexibility in their travel plans with options to travel at a lower value. As well, the promotions assist in reducing traffic during peak sailing times, freeing up space for other passengers.

Customer Service Centre

First Call Resolution (FCR)



Q4 Fiscal 2018 FCR Summary:

- In addition to customer feedback received through BC Ferries' Customer Relations department, customer questions and concerns are handled directly through the Customer Service Centre
- The Customer Service Centre received 472,464 calls in Fiscal 2018
- During Q4 Fiscal 2018, the Customer Service Centre received 72,663 customer calls as compared to 70,291 in Q4 Fiscal 2017
- With the implementation of new call centre technology, BC Ferries began tracking the rate at which customers called back within the same day. This data has provided a picture of how many customers received "First Call Resolution":
 - Preliminary data shows that just over 93% of individual customers have their concerns resolved on their first call
 - The approximately 6.5% of customers who call BC Ferries repeatedly in one day drive roughly 20% of total call volume
- First Call Resolution showed significant improvement in March as the 'new hire' group of employees became more efficient on the phones

Customer Satisfaction Tracking

Survey Methodology

- The Customer Satisfaction Tracking is an intercept survey conducted annually in three waves – June, August and November
- Data sampling validation and weighing is statistically relevant to passenger distribution
- The surveys are conducted on Routes 1, 2, 3, 30, 4, 5/9 and 19
- An interview with every fifth passenger is attempted and both foot and vehicle passengers are approached
- All areas of the vessel are covered (except closed lower car decks)
- Phase 1 of the survey data collection is conducted in person, collecting key passenger data
- Phase 2 of the survey has customers complete a self-administered portion post travel regarding their experience

Customer Satisfaction Tracking

Overall Customer Satisfaction:

OVERALL SATISFACTION	2012	2013	2014	2015	2016	2017
ALL Routes	4.19	4.17	4.11	4.14	4.18	4.16
Route 1	4.32	4.30	4.29	4.27	4.29	4.26
Route 2	4.07	4.08	4.07	4.12	4.16	4.21
Route 30	4.21	4.21	4.16	4.19	4.19	4.14
Route 3	4.11	3.96	3.91	3.88	3.96	3.92
Route 4	4.18	4.18	4.19	4.13	4.20	4.24
Route 19	4.11	4.13	3.46	3.98	4.14	3.99
Route 5/9	4.12	4.15	4.08	4.15	4.24	4.14

Average satisfaction score out of 5 where 1 = very dissatisfied and 5 = very satisfied. (Source: Mustel Group CST Research)

Percent satisfied	Nov 12	Nov 13	Nov 14	Nov 15	Nov 16	Nov 17
All BC Ferries	88%	87%	85%	87%	88%	87%

Combined % who rated 4 (satisfied) or 5 (very satisfied) on a 5-point scale
Ranging from 1 = very dissatisfied to 5 = very satisfied; for the November Waves only (Source: Mustel Group CST Research)

Fiscal 2018 Year End Summary:

- A total of 87% of customers reported to be satisfied overall in the November 2017 measure with their experience travelling on BC Ferries, resulting in an average score of 4.16. These findings are consistent with those recorded in the previous fiscal year end summary (4.18 average score, 88% satisfied).

Customer Satisfaction Tracking

Overall Value For Money:

OVERALL SATISFACTION	2012	2013	2014	2015	2016	2017
<i>All Surveyed Routes</i>	2.94	2.93	2.76	2.86	3.03	3.11
Route 1	3.05	3.06	2.92	3.05	3.12	3.22
Route 2	2.82	2.91	2.77	2.72	2.94	3.09
Route 30	2.91	2.80	2.67	2.79	2.87	3.01
Route 3	2.87	2.79	2.64	2.69	3.10	2.98
Route 4	3.04	2.93	2.80	2.84	3.00	3.09
Route 19	2.98	2.81	2.32	2.66	3.07	3.04
Route 5/9	2.90	2.93	2.70	2.96	3.16	3.11

Average satisfaction score out of 5 where 1 = very dissatisfied and 5 = very satisfied. (Source: Mustel Group CST Research)

Fiscal 2018 Year End Summary:

- Although the overall satisfaction is stable, for the third straight year an increase is reported in satisfaction for the overall value for money of fares (average now at 3.11 compared to 2.76 in Fiscal 2014)
- This trend likely indicates that pricing promotions and holding fare adjustments are resonating positively with customers

Customer Satisfaction Tracking

Overall Experience at the Terminal:

OVERALL SATISFACTION	2012	2013	2014	2015	2016	2017
<i>All Surveyed Routes</i>	4.08	4.08	4.03	4.07	4.08	4.07
Route 1	4.17	4.21	4.11	4.14	4.12	4.15
Route 2	4.05	4.05	4.04	4.07	4.10	4.08
Route 30	4.15	4.15	4.09	4.11	4.13	4.10
Route 3	3.90	3.86	3.94	3.90	3.94	3.86
Route 4	4.03	4.02	4.01	4.05	3.95	4.08
Route 19	3.96	3.97	3.66	3.96	3.95	3.97
Route 5/9	4.09	4.06	4.04	4.12	4.16	4.09

Average satisfaction score out of 5 where 1 = very dissatisfied and 5 = very satisfied. *Source: Mustel Group CST Research)*

Fiscal 2018 Year End Summary:

- The majority of terminal ratings are relatively consistent with the previous measure but there have been some fluctuations in a few areas:
 - Increased rating registered in value for money at the outdoor market
 - Decreased ratings for announcements, procedures for loading and availability and priority of the upper car deck
 - Decreased rating on Route 2, where revised schedule created a gap in afternoon schedule with the removal of the 5 pm sailing
 - Decreased rating on Route 3 where, customers were significantly impacted by on time performance issues prior to the schedule change in January 2018
 - Decreased rating on Route 30, where vessel changes affected commercial vehicle space availability

Customer Satisfaction Tracking

Overall Experience Onboard:

OVERALL SATISFACTION	2012	2013	2014	2015	2016	2017
<i>All Surveyed Routes</i>	4.14	4.13	4.07	4.10	4.14	4.12
Route 1	4.23	4.21	4.15	4.17	4.21	4.19
Route 2	4.07	4.11	4.09	4.06	4.15	4.12
Route 30	4.19	4.16	4.12	4.12	4.17	4.15
Route 3	4.08	4.03	3.99	4.02	4.01	4.00
Route 4	4.00	4.01	4.03	4.01	4.02	4.06
Route 19	4.02	4.02	3.71	3.96	4.07	4.07
Route 5/9	4.05	4.09	4.02	4.17	4.16	4.06
Average satisfaction score out of 5 where 1 = very dissatisfied and 5 = very satisfied. (Source: Mustel Group CST Research)						

Fiscal 2018 Year End Summary:

- Most onboard service satisfaction ratings are relatively consistent with last fiscal year. The levels that have decreased are related to:
 - Announcements when one needs to be informed
 - Ease of access for those with disabilities
 - Atmosphere/environment
 - Procedures for unloading
 - Unable to remain in vehicle on lower car deck

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

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

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

SUNSHINE COAST	
ROUTE LABEL	TERMINALS
ROUTE 3	HORSESHOE BAY-LANGDALE
ROUTE 7	EARLS COVE-SALTERY 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 TO NORTH COAST (McLOUGHLIN BAY, OCEAN FALLS, BELLA COOLA, SHEARWATER, KLEMTU)
ROUTE 10S	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

Engagement Activities



Spring, 2018 Ferry Advisory Committee (FAC) Meetings Planned

- BC Ferries has meetings twice yearly with FACs to discuss local terminal and service issues. The most recent series of meetings with FACs commenced in May, 2018:
 - Southern Gulf Islands FAC
 - Chemainus / Thetis / Penalakut FAC
 - Salt Spring Island FAC
 - North & Central Coast FAC
 - Northern Sunshine Coast FAC
 - Southern Sunshine Coast FAC
 - Gambier Keats FAC
 - Bowen Island FAC
 - Gabriola FAC
 - Campbell River / Quadra / Cortes FAC
 - Denman / Hornby FAC
- BC Ferries also engages with FACs at other times, such as to address emerging issues and critical events

Common FAC Themes/Improvements

- 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 added service to the following routes prior to the quarter ended March 31, 2018 (Q4 Fiscal 2018):
 - Comox to Powell River (Route 17)
 - Nanaimo Harbour to Gabriola Island (Route 19)
 - Denman Island to Hornby Island (Route 22)
 - Quadra Island to Cortes Island (Route 24)

Common FAC Themes/Improvements

- BC Ferries is continually seeking ways to improve customer communications and the sharing of information
- Prior to Q4 Fiscal 2018, efforts have included:
 - Improvements to service notices with more specific information provided
 - Enhancements to BC Ferries' website so customers can view camera displays at minor terminals to obtain traffic information
 - Implementation of digital signage for minor and unmanned terminals to provide customers with real time information
- During Q4 Fiscal 2018, BC Ferries introduced:
 - Improvements to FAC liaison during major service disruptions, including engaging FACs at the onset of events to seek feedback and suggestions for service recovery, and a new daily FAC briefing process

Common FAC Themes/Improvements (cont'd)

- In addition to twice yearly FAC meetings and newly introduced service description briefings, BC Ferries supports responsiveness to communities through:
 - Two FAC chair calls per year; and
 - Increased meetings between the FACs and local operational teams
- FACs also provide input into terminals and vessels
 - BC Ferries has provided for an engagement process with FACs in terms of vessel refits, new vessels and terminal development plans
- 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

Community 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' community engagement activities for the following projects:
 - Horseshoe Bay Terminal Development Planning
 - Swartz Bay Terminal Development Planning
 - Langdale Terminal Development Planning
 - Minor Terminal Development Planning

- Engagement continuing through Fall, 2018 to support the Terminal Development Plan for Horseshoe Bay
- **Phases 1 and 2** of BC Ferries' engagement process occurred during Q4 Fiscal 2018 and involved meetings and workshops with key stakeholders. Workshops focused on the participants' ideal vision for the future of Horseshoe Bay terminal and there were six key themes:



- **Phase 3** will occur during the quarter ending June 30, 2018 (Q1 Fiscal 2019) and will involve both larger stakeholder workshops and online engagement, building on the themes, priorities and opportunities identified during phases 1 and 2 to develop these ideas further into a conceptual vision for the terminal

- Engagement program planned during Q4 Fiscal 2018 supports the Terminal Development Plan for Swartz Bay, which commenced late May 2018

3 Phase process

- To raise awareness, build interest, and work with the community to explore ways of improving the terminal and to develop a future vision for the terminal
- To identify terminal improvements, phasing, and cost estimates to accommodate future growth and functional needs
- To ensure improvements are undertaken in a sustainable, cost-effective, and efficient way



- The objective of this engagement was to identify what was working with the terminal and what could be improved
- Engagement activities undertaken in fall, 2017 included internal and external stakeholder workshops (30 participants), mobile booths, a public information session in support of the Sunshine Coast Regional District rezoning process, and an online survey (2,154 responses)
- The outcomes of this phase of engagement are intended to be used to inform the Langdale Terminal design development (engagement pending for Fiscal 2019)

- The key themes that emerged from the fall 2017 engagement included:
 - A desire for improved passenger loading and unloading to improve ship-loading efficiency and on-time performance. Many participants were supportive of an overhead passenger walkway to help facilitate this
 - A desire for improved waiting areas to ensure comfort throughout the year – this included shade for hot summer months and enclosed warmed spaces for cooler winter months
 - A desire for enhanced accessibility of the terminal for seniors and those with mobility issues
 - Support for food vendor upgrades - such as extended hours or provisions for food trucks - emerged as a theme but participants also expressed reservations about upgrades that would dramatically change the character of the terminal or exclude local operators
 - Parking emerged as a key theme, and current parking resources are seen not to be functioning effectively

Minor Terminal Development Planning – Fiscal 2018

- In addition to the engagement activities at major terminals, BC Ferries completed engagement activities at four minor terminals over winter as part of the terminal development planning process
- Community members participated in the engagement process by attending the engagement event, interacting via email, or completing surveys (online and at the event)
- Alliford Bay & Skidegate Terminal top feedback includes:
 - Improve pedestrian accessibility, pick up/drop off and foot passenger safety
 - Improve parking (short term, long term and transit)
- Denman East & Hornby Island top feedback includes:
 - Improve vehicle holding capacity (holding lanes, parking)
 - Improve safety (traffic control, traffic overflow, separate pick up/drop off area)
 - Maintain natural surrounding (green space, trees views)