
British Columbia Ferry Services Inc.

Annual Report
to the
British Columbia Ferries Commissioner

Year Ended March 31, 2021



BCFerries

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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, 2021 (the "fiscal year" or "fiscal 2021"),¹ 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 2021, BC Ferries delivered coastal ferry services on 25 designated ferry routes under the Coastal Ferry Services Contract² (the "Contract") between BC Ferries and the Province of British Columbia (the "Province"), as represented by the Ministry of Transportation and Infrastructure. The designated ferry routes are regulated under the Act.³ In accordance with the Contract, BC Ferries also manages ferry transportation services on other unregulated routes through contracts with alternative service providers.

Service levels in the Contract were adjusted by agreements with the Province as a result of impacts to traffic from the COVID-19 pandemic (the "Additional Agreements").⁴ Two of these Additional Agreements, the Temporary Service Level Adjustment Agreement dated April 1, 2020 and the Temporary Service Level Adjustment Agreement #2 dated June 2, 2020 (the "Temporary Service Level Adjustment agreements"), enabled BC Ferries to reduce ferry services below Contract-required levels for a specified period on various Major, Minor and Northern routes. In comparison, the Supplemental Service Agreement of June 18, 2021 increased ferry services for a time on specified Minor routes, and the Contribution Agreement of November 11, 2020 identified a number of Minor and Northern route sailings, typically delivered at the discretion of BC Ferries, to be delivered by the Company for the fiscal year (and for the remainder of the performance term).

¹ Fiscal years at BC Ferries are from April 1 to March 31.

² As amended for performance term five (April 1, 2020 – March 31, 2024).

³ 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; 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.

⁴ The World Health Organization declared the novel coronavirus ("COVID-19") outbreak a global pandemic on March 11, 2020.

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.⁵

Part 2: Service Quality

Feedback and Engagement Report

Part 2 includes BC Ferries' feedback and engagement report for fiscal 2021. 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 2020 customer satisfaction tracking report.

⁵ Unless otherwise stated, the reports included in this Annual Report were prepared by the Company and are unaudited.

Part 1

Services on Designated Routes



Part 1: Services on Designated Routes

Overview

This part contains financial statistics as well as information on traffic levels and operating and performance statistics for fiscal 2021 for each of the designated ferry routes. The following three reports are included:

1.1 Operations Report

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

i. Round Trips

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

During the fiscal year, BC Ferries continued to provide a safe and healthy travel experience for its customers and employees. On a system-wide basis, BC Ferries delivered a total of 79,454.0 round trips during the fiscal year, which exceeded by 483 the annual number of round trips required to be delivered under the Contract, inclusive of the two Temporary Service Level Adjustment agreements.

BC Ferries met all core service levels in fiscal 2021, in terms of the delivery of the minimum required round trips under the Contract and taking into account the Additional Agreements.

ii. 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 three).

In fiscal 2021, as a result of service level adjustments resulting from the Additional Agreements, BC Ferries did not provide capacity sufficient to carry the previous year's traffic. As compared to the prior fiscal year, capacity utilization in fiscal 2021 also decreased by 8.5% system-wide, primarily because of lower traffic levels as a result of the COVID-19 pandemic. Capacity utilization on the designated ferry routes ranged from 24.1% to 69.6%.

iii. Traffic and Revenue

This report presents vehicle traffic (AEQs) and passenger traffic carried on each of the designated ferry routes during fiscal 2021 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 2021, traffic and revenue were detrimentally impacted by the COVID-19 pandemic, including as a result of changed customer travel patterns, preventative health and safety measures and various travel restrictions. BC Ferries carried 6.7 million vehicles and 13.1 million passengers, decreases of 23.8% and 39.7% respectively, compared to the prior year.⁶ Revenue from vehicle and passenger traffic on the designated ferry routes in fiscal 2021 totalled \$424.1 million, a decrease of \$189.1 million from the prior year.

Considerations for the fiscal year included:

- *Federal/Provincial Funding*

In December 2020, BC Ferries received \$308 million in federal/provincial funding to ensure essential services were maintained across the province and that fares remained affordable. The Company is grateful to have received this contribution in recognition of the essential nature of the coastal ferry system, and thanks both levels of government for their collaboration during the pandemic.

- *Cost Containment*

In conjunction with the federal/provincial contribution, BC Ferries continued throughout the fiscal year to direct significant efforts at lowering costs. The Company manages financial sustainability and prudent asset management in the public interest. In addition, BC Ferries is required to work toward achieving an efficiency target equivalent to one percent of annual operating, maintenance and administration costs.⁷

These cost reduction measures resulted in a 10.2% (\$68.5 million) decrease in operating expenses, as compared to fiscal 2020. Savings included:

- Reduced fuel and direct labour expenditures, as a result of reduced service levels through the Temporary Service Level Adjustment agreements, service provision on some routes at Contract-required minimums throughout the year, or slightly above based on traffic demand, and a reduction in catering and retail service offerings; and
- Without compromising safety, reduced discretionary activities including travel, training, regional services, maintenance, contracted services and advertising.

⁶ 6.7 million vehicles are equivalent to 7.9 million AEQs. The decrease in vehicles is equivalent to 21.5% when calculated on the basis of AEQs.

⁷ Paragraph 4 of Order 19-04 (*In the Matter of the Final Decision on Price Caps for the Fifth Performance Term Pursuant to the Coastal Ferry Act*).

As the recovery from the COVID-19 pandemic progresses, BC Ferries will focus efforts on returning service in line with health regulations and traffic demand, and towards achieving the required one percent efficiency target noted above.

- o *Standardization*

BC Ferries' fleet standardization strategy, which will reduce the variety of vessels in its fleet from about 17 to five standard vessel platforms, will improve interoperability and maintainability, and has also helped to reduce costs. The financial benefits of standardization are realized during initial asset acquisition as well as through-life operating savings. To date, initial acquisition savings achieved through the introduction of standardized Salish and Island class vessels are estimated at over \$2 million, including reduced cost of initial training, development of operating and maintenance procedures, acquisition of spare parts and completing dock fits. Ongoing savings associated with these classes of vessels are estimated at up to \$250 thousand per year and will grow as the commonality of standardized components, systems, procedures, design features and equipment selection increase as more standardized vessels join the fleet.⁸

iv. 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.⁹ 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 2021, on-time performance was 89.1%, in comparison to 89.4% for the previous year. On-time performance declined slightly due to a combination of additional COVID-19 health and safety measures, and a late summer surge in traffic that resulted in slower boarding procedures.

1.2 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 five.¹⁰ There are four sections of this report, showing for each designated route and route grouping:

⁸ Standardization has important benefits. With identical vessels, crews can work on more than one ship, moving more easily between vessels without need to retrain. Standardization of terminal infrastructure means vessels can operate between terminals without need for modification. Another benefit of standard, identical assets is lower lifetime operating costs. These savings are due to efficiencies of maintenance, coordinated purchasing of identical parts and service, simplified fleet deployments and identical interoperability across routes. Furthermore, when equipment and procedures are standardized, complexity is reduced, risks can be managed more effectively and overall safety of operations is increased.

⁹ 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 the percentage of sailings *arriving* within 10 minutes of the scheduled time.

¹⁰ This report describes compliance with the minimum or 'core' service levels required by the Contract. It does not include cancellations or round trips above these minimums where the core service levels were met.

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1. Cancelled Round Trips, inclusive of the number of cancellations of minimum required round trips for reasons permitted by the Contract as well as any others that were not allowable under the Contract;
 2. Cancelled and Extra Round Trips, with overall positive or negative variance to Contract-required minimum service levels, taking into account the reductions of required service levels as a result of the two Temporary Service Level Adjustment agreements with the Province;¹¹
 3. Cancelled Round Trips by Days, noting the cumulative and consecutive number of days for which round trips were missed; and
 4. Round Trip Service Delivery and On-Time Performance, graphically presenting scheduled and actual round trips, on-time performance (percentage of sailings departing or arriving, as applicable, within 10 minutes of the scheduled time), and the reasons for the delays. This report also provides information on "overload sailings" (sailings for which one or more vehicles waiting to travel could not be accommodated).

As noted above, in fiscal 2021, BC Ferries exceeded by 483 the annual number of round trips required to be delivered under the Contract (i.e., *before* accounting for reductions in required service levels as a result of the two Temporary Service Level Adjustment agreements). Many of these additional round trips were delivered on the routes connecting Langdale with Gambier and Keats islands (route 13) and Skidegate with 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).

During the fiscal year, BC Ferries also reduced service levels on various routes below those required under the Contract in accordance with the Temporary Service Level Adjustment agreements. The most reductions in relation to the Contract were seen on the Major Routes connecting Swartz Bay and Tsawwassen, Horseshoe Bay and Departure Bay, and Horseshoe Bay and Langdale (routes 1, 2 and 3). Service was also temporarily suspended on the route connecting Mill Bay and Brentwood Bay (route 12).

Overall, 9.7% of the sailings on the designated ferry routes were overloaded during the fiscal year, a decrease from 13.5% in fiscal 2020.

1.3 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 for the Company as a whole 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.

¹¹ In the "Cancelled and Extra Round Trips" report, the columns in the table presenting the Cancelled & Extra Round Trips by Routes show the following: Actual round trips provided less round trips required, which results in the variance or net extra or short round trips under the Contract. This is then adjusted for minimum required round trips that were cancelled as well as round trips reduced by the Temporary Service Level Adjustment Agreements, to show the total extra or short round trips for each regulated route and the route groupings.

Operations Report

Year Ended March 31, 2021



Operations Summary Report for the Year Ended March 31, 2021

Routes	A Actual Round Trips	B Capacity Provided (AEQ's)	C AEQ's Carried Fiscal 2021	D Capacity Utilization Fiscal 2021 (C / B)	E Capacity Utilization Fiscal 2020	F AEQ's Carried Fiscal 2020	G AEQ Growth (C - F)	H AEQ Tariff Revenue Fiscal 2021 Note 2	I AEQ Tariff Revenue Fiscal 2020 Note 2	J AEQ Tariff Revenue Growth (H - I)
1	3,250.0	2,239,426	1,557,909	69.6%	84.1%	2,369,436	(811,527)	\$ 106,232,291	\$ 152,416,489	(46,184,198)
2	2,213.5	1,374,776	838,402	61.0%	68.8%	1,334,158	(495,756)	55,498,711	81,940,368	(26,441,657)
3	2,834.0	1,755,940	1,081,426	61.6%	65.9%	1,301,507	(220,081)	26,301,097	29,124,214	(2,823,117)
30	2,627.0	1,533,412	911,202	59.4%	63.6%	1,015,464	(104,262)	69,916,739	73,280,010	(3,363,271)
Major Routes	10,924.5	6,903,554	4,388,939	63.6%	72.3%	6,020,565	(1,631,626)	257,948,838	336,761,081	(78,812,243)
10	76.0	16,839	10,033	59.6%	76.9%	17,840	(7,807)	2,486,632	4,806,872	(2,320,240)
11	146.0	32,012	13,839	43.2%	69.4%	24,724	(10,885)	2,323,677	3,894,245	(1,570,568)
28	52.0	2,513	653	26.0%	61.4%	3,467	(2,814)	48,695	783,796	(735,101)
Northern Routes	274.0	51,364	24,525	47.7%	71.4%	46,031	(21,506)	4,859,004	9,484,913	(4,625,909)
4	2,879.0	522,114	296,226	56.7%	63.1%	357,288	(61,062)	3,217,361	3,758,661	(541,300)
5	3,263.0	614,660	270,612	44.0%	45.2%	299,626	(29,014)	3,276,768	3,460,336	(183,568)
6	4,702.0	504,811	251,632	49.8%	61.5%	266,471	(14,839)	3,046,270	3,138,344	(92,074)
7	2,853.0	639,072	179,673	28.1%	33.2%	213,970	(34,297)	4,142,620	4,424,910	(282,290)
8	5,566.0	994,410	512,617	51.5%	59.4%	569,463	(56,846)	5,434,257	5,844,333	(410,076)
9	800.0	254,748	161,471	63.4%	63.0%	217,944	(56,473)	6,979,509	9,087,520	(2,108,011)
12	2,494.0	94,772	57,724	60.9%	81.7%	100,933	(43,209)	674,189	1,139,503	(465,314)
13	5,130.0	Pass. Only	Pass. Only	Pass. Only	Pass. Only	100,933	(43,209)	674,189	1,139,503	(465,314)
17	1,430.0	394,294	153,632	39.0%	48.6%	193,118	(39,486)	5,793,535	6,744,450	(950,915)
18	3,016.5	261,945	103,482	39.5%	45.5%	105,784	(2,302)	814,085	763,250	50,835
19	5,266.0	663,228	368,155	55.5%	60.2%	397,912	(29,757)	3,157,206	3,152,590	4,616
20	3,692.0	191,854	92,749	48.3%	51.8%	99,545	(6,794)	704,138	742,905	(38,767)
21	5,819.5	522,495	283,974	54.3%	58.8%	308,269	(24,295)	2,006,884	2,090,357	(83,473)
22	4,646.0	231,610	121,599	52.5%	57.3%	133,747	(12,148)	905,799	967,475	(61,676)
23	6,269.5	732,788	396,696	54.1%	59.1%	436,524	(39,828)	3,045,749	3,240,736	(194,987)
24	2,135.0	111,020	63,337	57.1%	62.4%	70,307	(6,970)	601,971	660,272	(58,301)
25	3,925.0	294,946	93,452	31.7%	40.4%	104,857	(11,405)	915,362	989,167	(73,805)
26	4,369.0	139,808	33,717	24.1%	50.0%	56,659	(22,942)	294,684	497,493	(202,809)
Minor Routes	68,255.5	7,168,575	3,440,748	48.0%	54.6%	3,932,417	(491,669)	45,010,808	50,702,531	(5,691,723)
Total	79,454.0	14,123,493	7,854,212	55.6%	64.1%	9,999,013	(2,144,801)	307,818,650	396,948,525	(89,129,875)

Obligation deferred (settled)

- -

Total vehicle fare revenue

307,818,650 396,948,525

Note 1

Revenue arises from bike traffic and freight.

Note 2) There is no obligation deferred or settled in Fiscal Year 2021 and Fiscal Year 2020.

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, 2021

Routes	K Passengers Fiscal 2021	L Passengers Fiscal 2020	M Passenger Growth (K - L)	N Passenger Tariff Revenue Fiscal 2021 Note 2	O Passenger Tariff Revenue Fiscal 2020 Note 2	P Passenger Tariff Revenue Growth (N - O)	% Sailings Within 10 Min. (Note 3)		
							YE Fiscal 2019	YE Fiscal 2020	YE Fiscal 2021
1	2,578,221	6,124,234	(3,546,013)	39,230,411	91,309,787	(52,079,376)	87.6%	87.2%	86.6%
2	1,669,054	3,298,151	(1,629,097)	25,150,326	48,775,753	(23,625,427)	81.8%	87.3%	86.2%
3	1,797,894	2,631,102	(833,208)	9,517,331	13,518,977	(4,001,646)	81.4%	88.0%	83.7%
30	1,158,810	1,652,801	(493,991)	17,378,372	23,970,199	(6,591,827)	85.3%	83.2%	80.6%
Major Routes	7,203,979	13,706,288	(6,502,309)	91,276,440	177,574,716	(86,298,276)	84.3%	86.6%	84.3%
10	15,788	45,748	(29,960)	1,577,178	5,096,255	(3,519,077)	85.7%	91.8%	92.4%
11	17,385	47,070	(29,685)	543,176	1,522,607	(979,431)	92.4%	92.1%	93.8%
28	917	7,585	(6,668)	45,216	939,599	(894,383)	71.0%	72.1%	60.2%
Northern Routes	34,090	100,403	(66,313)	2,165,570	7,558,461	(5,392,891)	85.0%	85.6%	82.8%
4	462,546	662,431	(199,885)	1,924,700	2,742,617	(817,917)	93.9%	92.4%	96.4%
5	396,767	501,219	(104,452)	1,525,387	1,909,393	(384,006)	83.0%	81.4%	82.3%
6	395,352	479,800	(84,448)	1,381,288	1,644,946	(263,658)	74.1%	93.8%	96.1%
7	277,667	361,533	(83,866)	1,462,453	1,844,460	(382,007)	96.6%	95.8%	93.8%
8	924,639	1,281,422	(356,783)	2,731,011	3,687,853	(956,842)	91.7%	92.1%	95.5%
9	350,010	565,051	(215,041)	3,701,369	5,893,941	(2,192,572)	81.3%	77.9%	77.0%
12	108,826	198,874	(90,048)	441,337	812,625	(371,288)	86.1%	92.0%	95.0%
13	37,660	43,905	(6,245)	148,890	151,606	(2,716)	99.4%	99.7%	98.5%
17	258,792	396,958	(138,166)	2,719,390	4,020,165	(1,300,775)	92.1%	91.2%	94.4%
18	156,173	171,914	(15,741)	419,588	468,168	(48,580)	95.6%	94.0%	90.8%
19	599,439	805,907	(206,468)	1,598,175	2,015,334	(417,159)	85.9%	86.5%	77.7%
20	192,208	266,724	(74,516)	444,859	549,780	(104,921)	71.7%	68.9%	64.2%
21	460,556	542,837	(82,281)	1,128,583	1,274,810	(146,227)	97.8%	98.3%	98.4%
22	212,820	253,092	(40,272)	578,717	636,175	(57,458)	96.2%	97.9%	97.5%
23	690,845	871,056	(180,211)	1,642,909	2,055,963	(413,054)	97.0%	98.0%	97.3%
24	102,820	119,691	(16,871)	309,262	373,924	(64,662)	90.2%	89.2%	83.9%
25	170,795	243,899	(73,104)	540,173	751,754	(211,581)	86.5%	76.8%	82.1%
26	47,365	104,336	(56,971)	118,366	286,422	(168,056)	96.4%	95.9%	98.7%
Minor Routes	5,845,280	7,870,649	(2,025,369)	22,816,457	31,119,936	(8,303,479)	89.3%	89.9%	89.8%
Total	13,083,349	21,677,340	(8,593,991)	116,258,467	216,253,113	(99,994,646)	88.5%	89.4%	89.1%
Obligation deferred (settled) _____ - -									
Total passenger revenue 116,258,467 216,253,113									
Total vehicle and passenger revenue 424,077,117 613,201,638									

Temporary Service Disruptions Report

Year Ended March 31, 2021



CANCELLED ROUND TRIPS BY ROUTES

Performance Against CFSC Requirements - Annual Core Service Levels

Fiscal 2021 Year Ended March 31, 2021			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 Cancels	% 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	Situations that Compromise Safety	Allowed Cancels	Community Event	Traffic	Other Cancels		
Major Routes	Route 01	Swartz Bay	Tsawwassen	0.5	17										17.5			0.0	17.5	0.64%
	Route 02	Horseshoe Bay	Departure Bay		28						2.5				30.5			0.0	30.5	
	Route 03	Langdale	Horseshoe Bay												0.0			0.0	0.0	
	Route 30	Duke Point	Tsawwassen		21						10				31.0			0.0	31.0	
Major Routes			0.5	66	0	0	0	0	0	0	12.5	0	0	0	79.0	0	0	0.0	79.0	0.64%
Northern Routes	Route 10	Port Hardy	Prince Rupert		1		0.5				1				2.5			0.0	2.5	2.28%
	Route 11	Skidegate	Prince Rupert		7		1		1		1				10.0			0.0	10.0	5.68%
	Route 28	Port Hardy	Bella Coola												0.0			0.0	0.0	0.00%
Northern Routes			0	8	0	0	1.5	0	1	0	2	0	0	0	12.5	0	0	0.0	12.5	3.34%
Minor Routes	Route 04	Fulford Harbour	Swartz Bay												0.0			0.0	0.0	0.00%
	Route 05	Swartz Bay	Four SGIs		2						2				4.0			0.0	4.0	0.12%
	Route 06	Crofton	Vesuvius Bay		2										2.0			0.0	2.0	0.04%
	Route 07	Earls Cove	Salter Bay												0.0			0.0	0.0	0.00%
	Route 08	Horseshoe Bay	Bowen Island												0.0			0.0	0.0	0.00%
	Route 09	Tsawwassen	Long Harbour		3										3.0			0.0	3.0	0.36%
	Route 12	Mill Bay	Brentwood Bay								1				1.0			0.0	1.0	0.03%
	Route 13 ⁽¹⁾	Langdale	Gambier/Keats		8										8.0			0.0	8.0	0.20%
	Route 17	Little River	Powell River		20						2				22.0			0.0	22.0	1.61%
	Route 18	Texada	Powell River		19						2				21.0			0.0	21.0	0.72%
	Route 19	Nanaimo Harbour	Gabriola Island												0.0			0.0	0.0	0.00%
	Route 20	Chemainus	Thetis Island				3				4		1		8.0			0.0	8.0	0.22%
	Route 21	Buckley Bay	Denman West		1						4				5.0			0.0	5.0	0.10%
	Route 22	Denman East	Hornby Island		9						10				19.0			0.0	19.0	0.47%
	Route 23	Campbell River	Quadra Island		35			0.5	0.5						36.0			0.0	36.0	0.58%
	Route 24	Quadra Island	Cortes Island		48										48.0			0.0	48.0	2.21%
	Route 25	Port McNeill	Alert Bay		24		10				2				36.0			0.0	36.0	0.91%
	Route 26	Skidegate	Alliford Bay		30		3								33.0			0.0	33.0	0.79%
Minor Routes			0	201	0	0	16	0.5	0.5	0	27	0	0	1	246.0	0	0	0.0	246.0	0.37%
TOTAL			0.5	275.0	0.0	0.0	17.5	0.5	1.5	0.0	41.5	0.0	0.0	1.0	337.5	0.0	0.0	0.0	337.5	0.43%

% of Annual Core Round Trips Cancelled

0.00% 0.35% 0.00% 0.00% 0.02% 0.00% 0.00% 0.00% 0.00% 0.05% 0.00% 0.00% 0.00% 0.43% 0.00% 0.00% 0.00% 0.43%

Notes:

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

CANCELLED & EXTRA ROUND TRIPS BY ROUTES

Fiscal 2021		
Year Ended March 31, 2021		
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 the 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).

⁽³⁾ In accordance with the Temporary Service Level Adjustment agreements (TSLA) with the Province dated April 1 and June 2, 2020, daily core service levels were adjusted on the Major Routes, Northern Routes, and Routes 5, 9 and 12 from April 4 to September 7, 2020. All service levels with respect to these agreements were met.

⁽⁴⁾ In accordance with the Supplemental Service Agreement with the Province dated June 17, 2020, BC Ferries added round trips on specified Minor Routes from June 19 to September 7, 2020. All service levels with respect to this agreement were met.

⁽⁵⁾ In accordance with Part D of Schedule "3" of the Contribution Agreement between BC Ferries and the Province dated November 11, 2020, BC Ferries delivered all required discretionary sailings on a prorated basis for the fiscal year.

Performance Against Annual Core Service Levels ⁽³⁾⁽⁴⁾⁽⁵⁾ Year Ended March 31, 2021					
Actual Round Trips ⁽¹⁾	Round Trips Required ⁽²⁾	Variance - Net Extra / Short Round Trips	Required Round Trips Cancelled	Total Round Trips Reduced by TSLA	Total Extra / Short Round Trips
3,250.0	3,512.0	-262.0	17.5	1,360.0	1,115.5
2,213.5	2,723.0	-509.5	30.5	981.5	502.5
2,834.0	2,945.0	-111.0	0.0	517.0	406.0
2,627.0	2,379.0	248.0	31.0	272.0	551.0
10,924.5	12,254.0	-1,329.5	79.0	3,130.5	1,880.0
76.0	109.5	-33.5	2.5	35.0	4.0
146.0	176.0	-30.0	10.0	25.0	5.0
52.0	89.0	-37.0	0.0	44.0	7.0
274.0	374.5	-100.5	12.5	104.0	16.0
2,879.0	2,879.0	0.0	0.0	0.0	0.0
3,263.0	3,468.0	-205.0	4.0	495.0	294.0
4,702.0	4,670.0	32.0	2.0	0.0	34.0
2,853.0	2,731.0	122.0	0.0	0.0	122.0
5,566.0	5,452.5	113.5	0.0	0.0	113.5
800.0	830.0	-30.0	3.0	223.0	196.0
2,494.0	3,215.0	-721.0	1.0	735.0	15.0
5,130.0	4,062.0	1,068.0	8.0	0.0	1,076.0
1,430.0	1,363.0	67.0	22.0	0.0	89.0
3,016.5	2,898.0	118.5	21.0	0.0	139.5
5,266.0	5,204.0	62.0	0.0	0.0	62.0
3,692.0	3,700.0	-8.0	8.0	0.0	0.0
5,819.5	5,261.0	558.5	5.0	0.0	563.5
4,646.0	4,060.0	586.0	19.0	0.0	605.0
6,269.5	6,247.0	22.5	36.0	0.0	58.5
2,135.0	2,171.0	-36.0	48.0	0.0	12.0
3,925.0	3,961.0	-36.0	36.0	0.0	0.0
4,369.0	4,170.0	199.0	33.0	0.0	232.0
68,255.5	66,342.5	1,913.0	246.0	1,453.0	3,612.0
79,454.0	78,971.0	483.0	337.5	4,687.5	5,508.0

CANCELLED ROUND TRIPS BY ROUTES

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

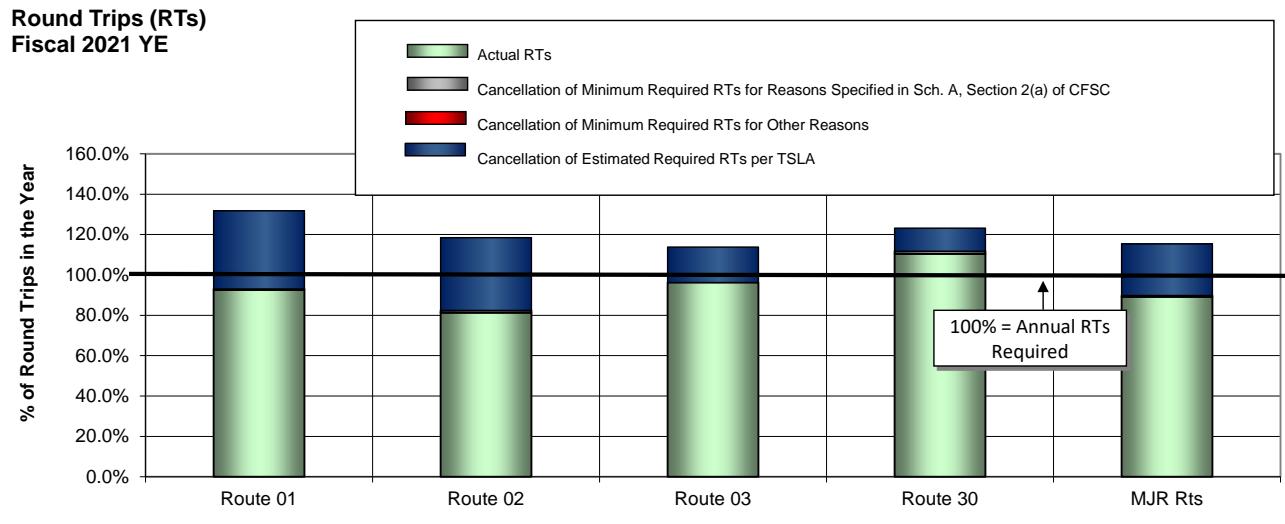
Fiscal 2021 Year Ended March 31, 2021				Performance Against CFSC Requirements Annual Core Service Level	
Routes				Cumulative Days When Round Trips Missed <i>Allowed 30 Days / Route</i>	Highest Consecutive Days when Round Trips Missed <i>Allowed 20 Days / Route</i>
Major Routes	Route 01	Swartz Bay	Tsawwassen	5	1
	Route 02	Horseshoe Bay	Departure Bay	11	1
	Route 03	Langdale	Horseshoe Bay	0	0
	Route 30	Duke Point	Tsawwassen	23	5
Northern Routes	Route 10	Port Hardy	Prince Rupert	5	2
	Route 11	Skidegate	Prince Rupert	18	2
	Route 28	Port Hardy	Bella Coola	0	0
Minor Routes	Route 04	Fulford Harbour	Swartz Bay	0	0
	Route 05	Swartz Bay	Four SGIs	3	1
	Route 06	Crofton	Vesuvius Bay	1	1
	Route 07	Earls Cove	Saltery Bay	0	0
	Route 08	Horseshoe Bay	Bowen Island	0	0
	Route 09	Tsawwasse	Long Harbour	3	1
	Route 12	Mill Bay	Brentwood Bay	1	1
	Route 13	Langdale	Gambier/Keats	2	1
	Route 17	Little River	Powell River	13	1
	Route 18	Texada	Powell River	9	1
	Route 19	Nanaimo Harbour	Gabriola Island	1	1
	Route 20	Chemainus	Thetis Island	8	2
	Route 21	Buckley Bay	Denman West	3	1
	Route 22	Denman East	Hornby Island	6	1
	Route 23	Campbell River	Quadra Island	6	1
	Route 24	Quadra Island	Cortes Island	17	2
	Route 25	Port McNeill	Alert Bay	12	1
	Route 26	Skidegate	Alliford Bay	10	3

Round Trip Service Delivery and On Time Performance

Fiscal 2021

Year Ended March 31, 2021

Major Routes



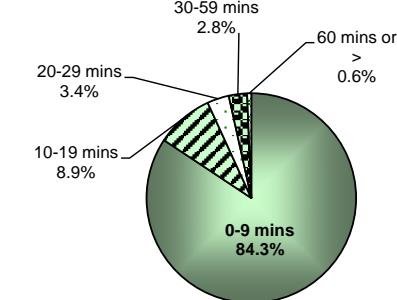
Routes	Route Description	Actual RTs	Core Round Trips Required ⁽¹⁾	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 01	Swartz Bay-Tsawwassen	3,250.0	3,512.0	-262.0	28.1%
Route 02	Horseshoe Bay-Nanaimo	2,213.5	2,723.0	-509.5	27.5%
Route 03	Langdale-Horseshoe Bay	2,834.0	2,945.0	-111.0	27.3%
Route 30	Nanaimo-Tsawwassen	2,627.0	2,379.0	248.0	29.3%
MAJOR Routes Total⁽²⁾		10,924.5	12,254.0	-1,329.5	28.1%

Notes:

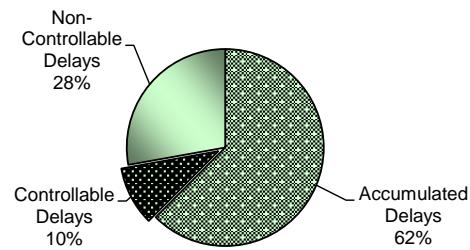
⁽¹⁾ For the Major Routes, the annual number of round trips required under the Coastal Ferry Services Contract includes minimums for each individual route as well as an aggregate total for the four routes (Route 1, 2, 3 and 30).

⁽²⁾ Route totals do not include required round trips cancelled, or adjustments to core service levels as a result of the Temporary Service Level Adjustment Agreements (TSLA) with the Province dated April 1 and June 2, 2020.

On Time Performance Fiscal 2021 YE

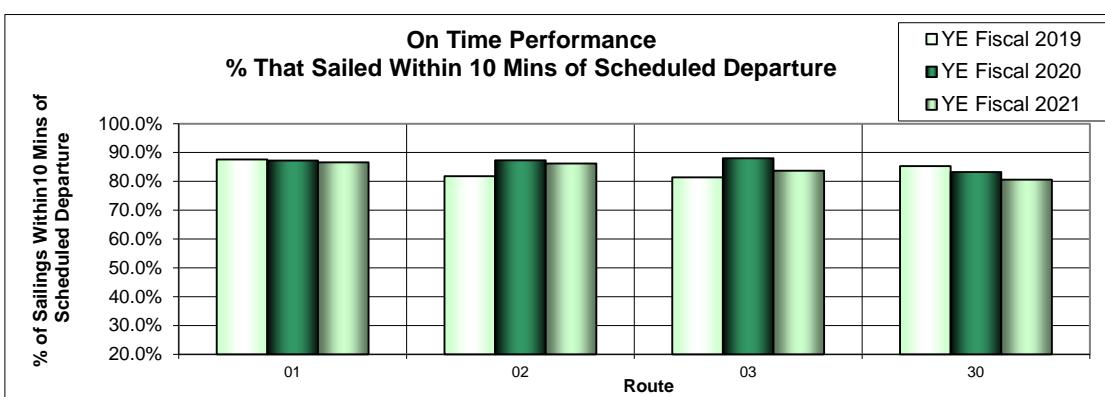


Reasons for Delays - Fiscal 2021 YE



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

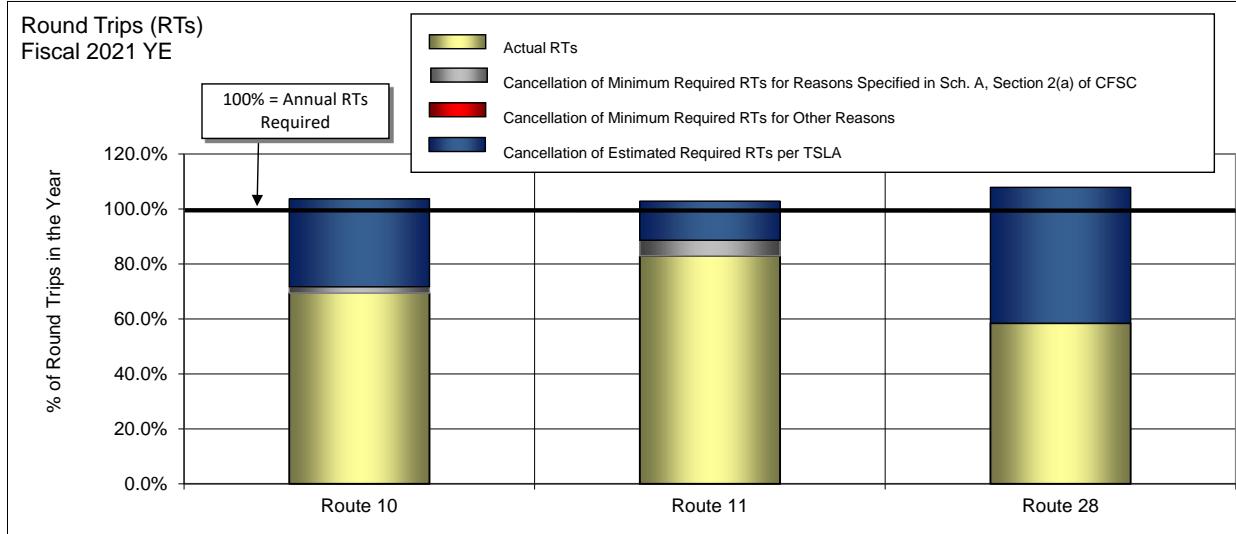


Round Trip Service Delivery and On Time Performance

Fiscal 2021

Year Ended March 31, 2021

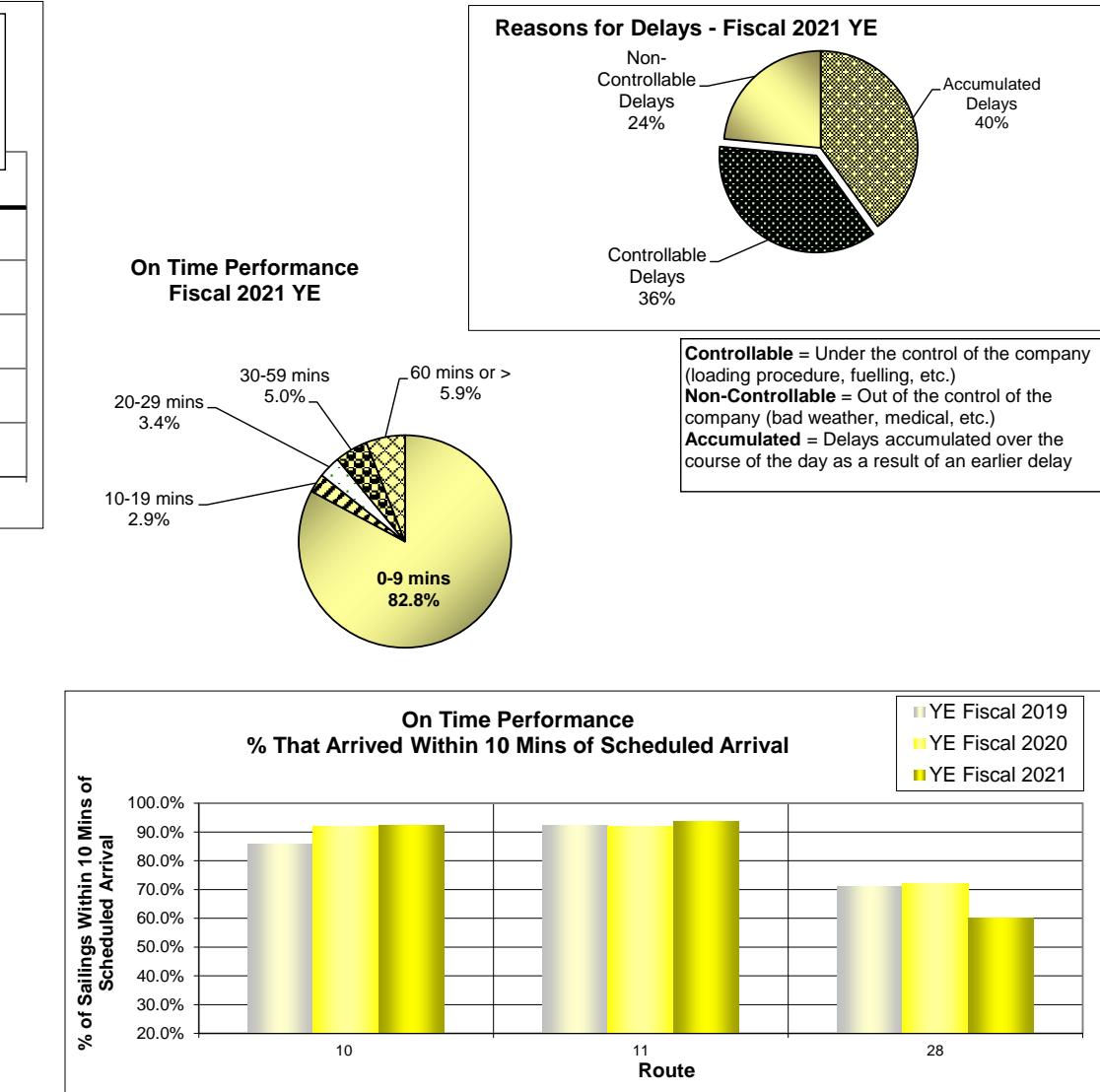
Northern Routes



Routes	Route Description	Actual RTs	Core Round Trips Required	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 10	Port Hardy-Prince Rupert	76.0	109.5	-33.5	0.5%
Route 11	Skidegate-Prince Rupert	146.0	176.0	-30.0	0.0%
Route 28	Port Hardy-Bella Coola	52.0	89.0	-37.0	0.0%
NORTHERN Routes Total⁽¹⁾		274.0	374.5	-100.5	0.2%

Note:

⁽¹⁾ Route totals do not include required round trips cancelled, or adjustments to core service levels as a result of the Temporary Service Level Adjustment Agreements (TSLA) with the Province dated April 1 and June 2, 2020.

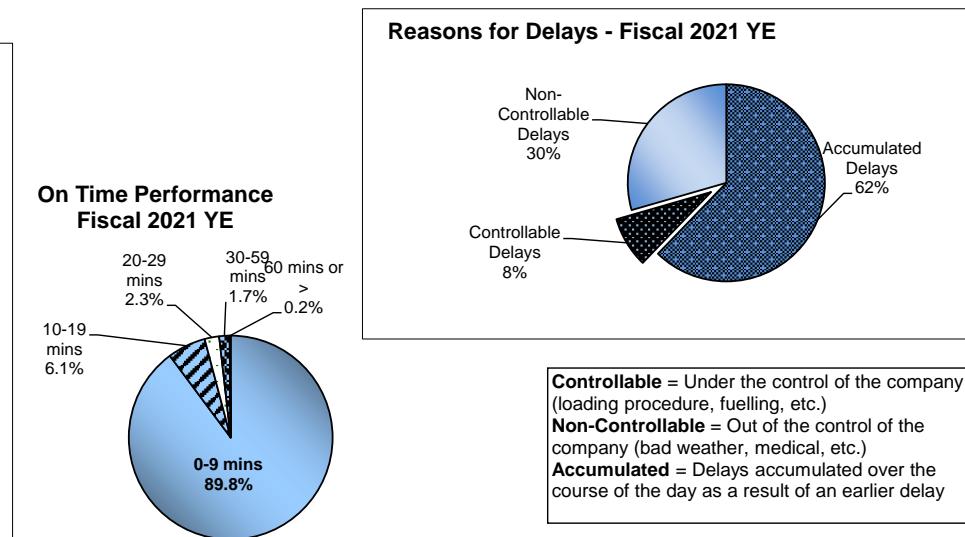
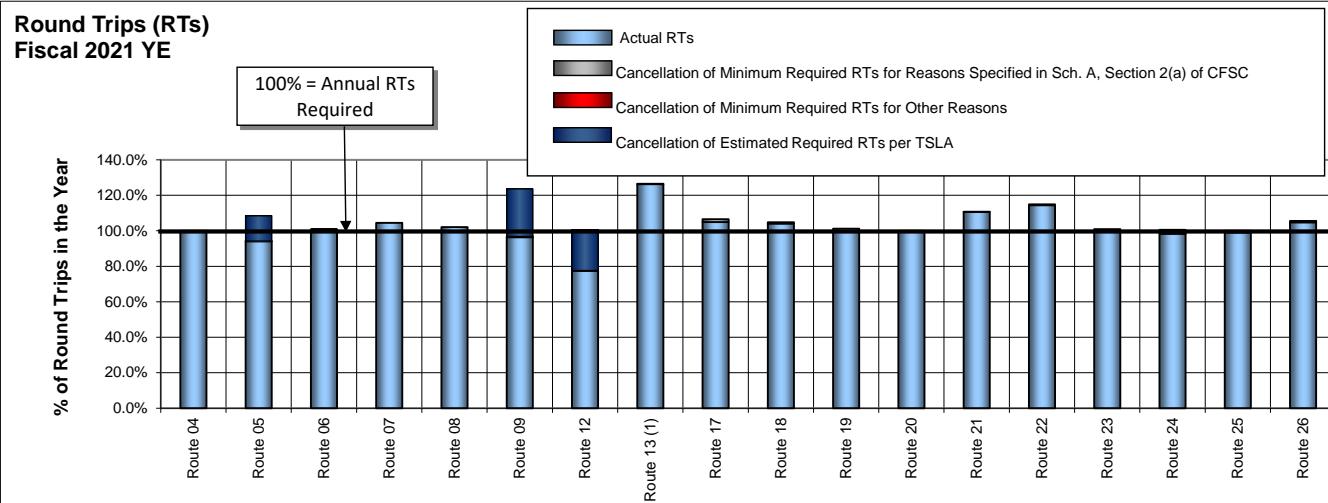


Round Trip Service Delivery and On Time Performance

Fiscal 2021

Year Ended March 31, 2021

Minor Routes

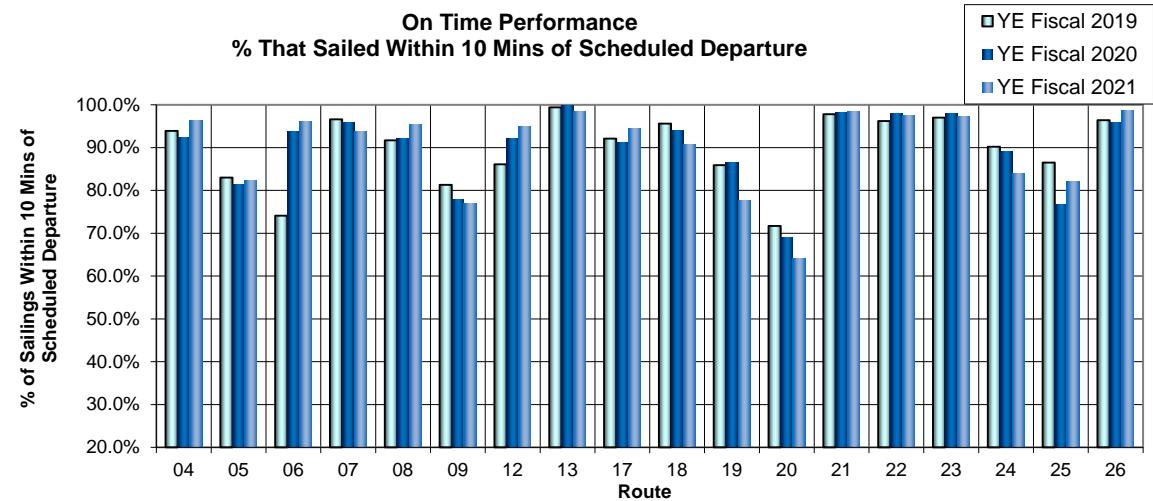


Routes	Route Description	Actual RTs	Core Round Trips Required	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 04	Swartz Bay-Fulford Harbour	2,879.0	2,879.0	0.0	7.3%
Route 05	Swartz Bay-Gulf Islands	3,263.0	3,468.0	-205.0	3.5%
Route 06	Crofton-Vesuvius Bay	4,702.0	4,670.0	32.0	8.9%
Route 07	Earls Cove-Saltery Bay	2,853.0	2,731.0	122.0	1.0%
Route 08	Horseshoe Bay-Bowen Island	5,566.0	5,452.5	113.5	7.3%
Route 09	Tsawwassen-Southern Gulf Islands	800.0	830.0	-30.0	5.6%
Route 12	Mill Bay-Brentwood Bay	2,494.0	3,215.0	-721.0	0.2%
Route 13 ⁽¹⁾	Langdale-Keats/Gambier	5,130.0	4,062.0	1,068.0	Pass Only
Route 17	Little River-Powell River	1,430.0	1,363.0	67.0	0.8%
Route 18	Powell River-Texada	3,016.5	2,898.0	118.5	1.2%
Route 19	Nanaimo Harbour-Gabriola Island	5,266.0	5,204.0	62.0	11.0%
Route 20	Chemainus-Thetis/Penelakut	3,692.0	3,700.0	-8.0	3.9%
Route 21	Buckley Bay-Denman West	5,819.5	5,261.0	558.5	11.0%
Route 22	Gravelly Bay-Hornby Island	4,646.0	4,060.0	586.0	15.6%
Route 23	Campbell River-Quadra Island	6,269.5	6,247.0	22.5	14.4%
Route 24	Quadra Island-Cortes Island	2,135.0	2,171.0	-36.0	9.2%
Route 25	Port McNeill-Sointula/Alert Bay	3,925.0	3,961.0	-36.0	1.4%
Route 26	Skidegate-Alliford Bay	4,369.0	4,170.0	199.0	0.2%
MINOR Routes Total⁽²⁾		68,255.5	66,342.5	1,913.0	6.9%

Notes:

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

⁽²⁾ Route totals do not include required round trips cancelled, or adjustments to core service levels as a result of the Temporary Service Level Adjustment Agreements (TSLA) with the Province dated April 1 and June 2, 2020.

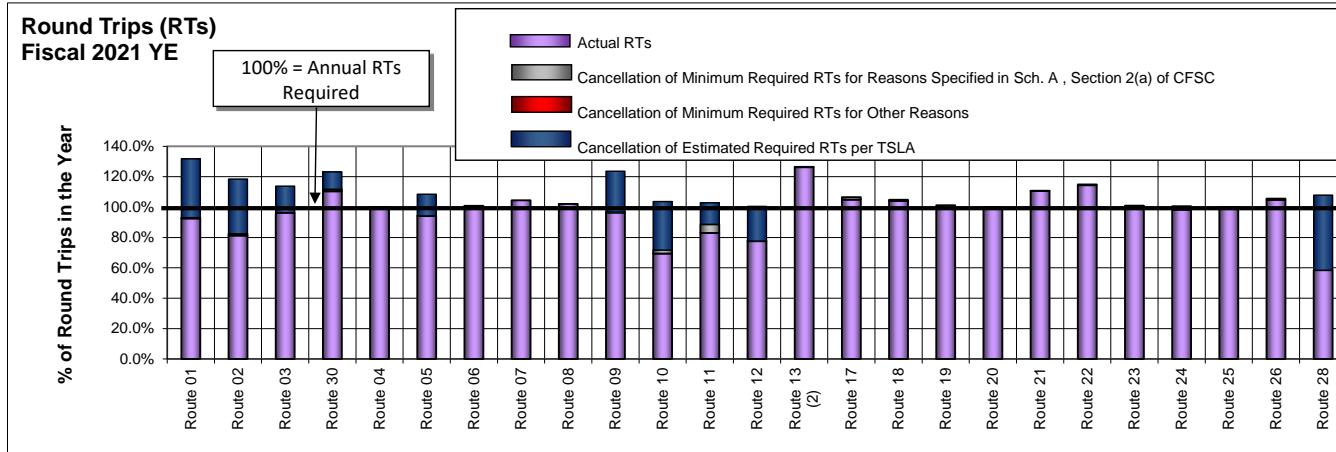


Round Trip Service Delivery and On Time Performance

Fiscal 2021

Year Ended March 31, 2021

All Routes



Routes	Route Description	Actual RTs	Core Round Trips Required ⁽¹⁾	Variance (Net Extra RT / Short RT)	% Sailings Overloaded
Route 01	Swartz Bay-Tsawwassen	3,250.0			28.1%
Route 02	Horseshoe Bay-Nanaimo	2,213.5			27.5%
Route 03	Langdale-Horseshoe Bay	2,834.0			27.3%
Route 30	Nanaimo-Tsawwassen	2,627.0			29.3%
Route 04	Swartz Bay-Fulford Harbour	2,879.0	2,879.0	0.0	7.3%
Route 05	Swartz Bay-Gulf Islands	3,263.0	3,468.0	-205.0	3.5%
Route 06	Crofton-Vesuvius Bay	4,702.0	4,670.0	32.0	8.9%
Route 07	Earls Cove-Saltery Bay	2,853.0	2,731.0	122.0	1.0%
Route 08	Horseshoe Bay-Bowen Island	5,566.0	5,452.5	113.5	7.3%
Route 09	Tsawwassen-Southern Gulf Islands	800.0	830.0	-30.0	5.6%
Route 10	Port Hardy-Prince Rupert	76.0	109.5	-33.5	0.5%
Route 11	Skidegate-Prince Rupert	146.0	176.0	-30.0	0.0%
Route 12	Mill Bay-Brentwood Bay	2,494.0	3,215.0	-721.0	0.2%
Route 13 ⁽²⁾	Langdale-Keats/Gambier	5,130.0	4,062.0	1,068.0	Pass Only
Route 17	Little River-Powell River	1,430.0	1,363.0	67.0	0.8%
Route 18	Powell River-Texada	3,016.5	2,898.0	118.5	1.2%
Route 19	Nanaimo Harbour-Gabriola Island	5,266.0	5,204.0	62.0	11.0%
Route 20	Chemainus-Thetis/Penelakut	3,692.0	3,700.0	-8.0	3.9%
Route 21	Buckley Bay-Denman West	5,819.5	5,261.0	558.5	11.0%
Route 22	Gravelly Bay-Hornby Island	4,646.0	4,060.0	586.0	15.6%
Route 23	Campbell River-Quadra Island	6,269.5	6,247.0	22.5	14.4%
Route 24	Quadra Island-Cortes Island	2,135.0	2,171.0	-36.0	9.2%
Route 25	Port McNeill-Sointula/Alert Bay	3,925.0	3,961.0	-36.0	1.4%
Route 26	Skidegate-Alliford Bay	4,369.0	4,170.0	199.0	0.2%
Route 28	Port Hardy-Bella Coola	52.0	89.0	-37.0	0.0%
All Routes Total⁽⁴⁾		79,454.0	78,971.0	483.0	9.7%

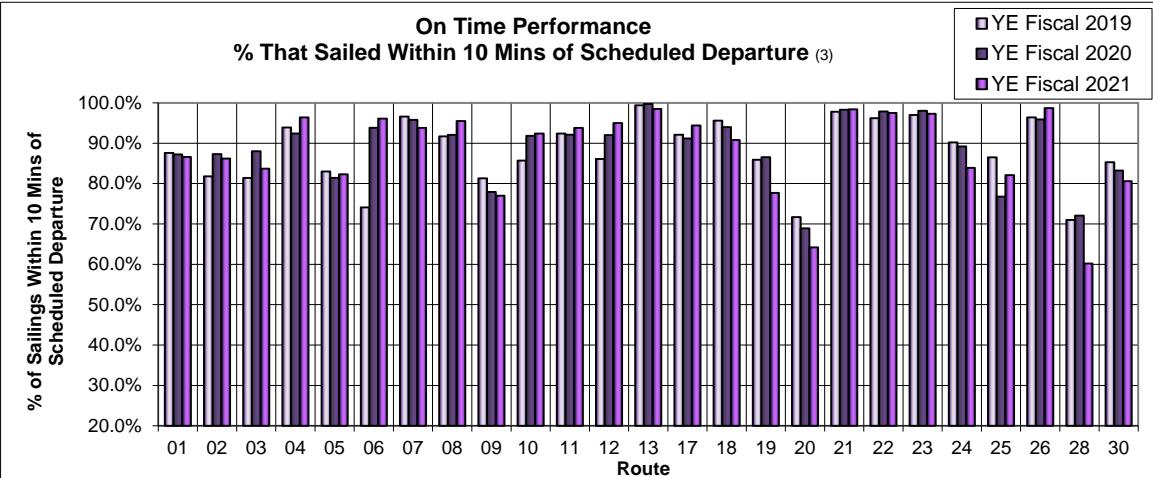
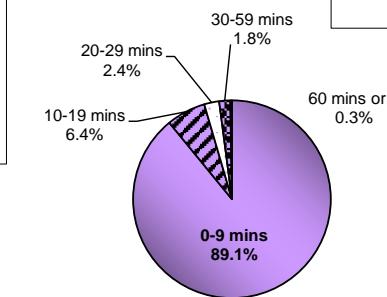
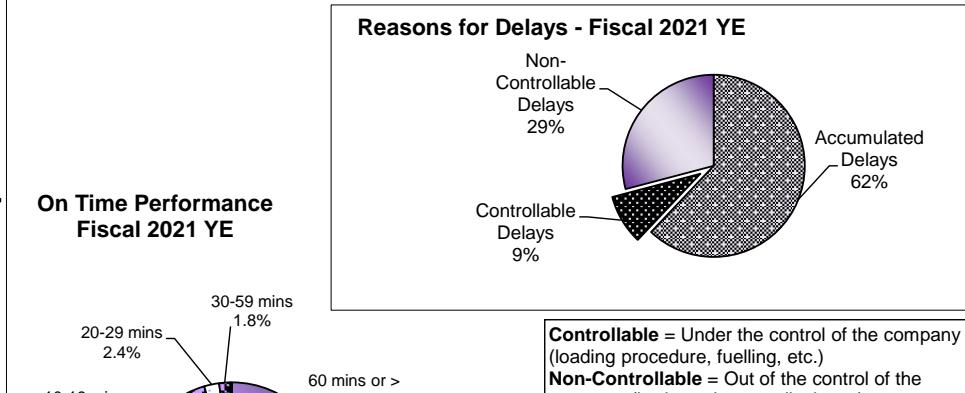
Notes:

⁽¹⁾ For the 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.

⁽⁴⁾ Route totals do not include required round trips cancelled, or adjustments to core service levels as a result of the Temporary Service Level Adjustment Agreements (TSLA) with the Province dated April 1 and June 2, 2020.



Route Financial Report

Year Ended March 31, 2021



British Columbia Ferry Services Inc.
Route Statement
For the Twelve Months Ended March 31, 2021

(in \$ 000's)

	Corporate Total		Major Routes		Northern Routes		Minor Routes		Unregulated Routes	
	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	424,077	613,202	349,225	514,336	7,025	17,044	67,827	81,822	-	-
Ancillary Revenue	24,582	75,425	20,547	65,327	1,895	4,576	2,140	5,522	-	-
Social Program Fees	7,750	15,165	3,532	7,869	669	950	3,549	6,346	-	-
Contracted Routes Fee	3,675	2,817	-	-	-	-	-	-	3,675	2,817
Total Operating Revenue	460,084	706,609	373,304	587,532	9,589	22,570	73,516	93,690	3,675	2,817
Total Operating Expenses	606,549	673,873	385,573	450,549	44,081	52,756	173,220	167,751	3,675	2,817
Earnings (Loss) from Operations	(146,465)	32,736	(12,269)	136,983	(34,492)	(30,186)	(99,704)	(74,061)	-	-
Depreciation and Amortization	(179,541)	(183,070)	(105,723)	(112,046)	(19,235)	(21,499)	(54,583)	(49,525)	-	-
Net Financing Expense	(56,135)	(54,500)	(28,193)	(29,738)	(7,961)	(6,481)	(19,981)	(18,281)	-	-
Cost of Capital	(235,676)	(237,570)	(133,916)	(141,784)	(27,196)	(27,980)	(74,564)	(67,806)	-	-
Loss (Gain) on Disposal and Impairment of Capital Assets	(8,501)	(2,285)	(6,956)	(2,062)	(109)	(69)	(1,436)	(154)	-	-
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(390,642)	(207,119)	(153,141)	(6,863)	(61,797)	(58,235)	(175,704)	(142,021)	-	-
Ferry Transportation Fees	194,226	198,005	6,821	18,547	54,779	69,634	132,626	109,824	-	-
Safe Restart Funding	186,000	-	156,011	-	5,170	-	24,819	-	-	-
Federal-Provincial Subsidy Agreement	32,028	31,340	-	-	8,218	8,041	23,810	23,299	-	-
Net Regulatory Earnings (Loss)	21,612	22,226	9,691	11,684	6,370	19,440	5,551	(8,898)	0	0
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	6,351	1,111	4,204	775	604	94	1,543	242	-	-
Fuel Rebates Paid	(6,761)	5,440	(5,394)	4,649	(125)	-	(1,242)	791	-	-
Provincial Contributions to Fuel Deferral Accounts	(230)	-	-	-	(230)	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	20,972	28,777	8,501	17,108	6,619	19,534	5,852	(7,865)	0	0

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.

Effective April 1, 2020, the CFSC was amended for PT5, formalizing ferry transportation fees for the four-year term which commenced April 1, 2020 and ends on March 31, 2024. The annual maximum ferry transportation fees for PT5 decreased by \$3.8 million compared to fiscal 2020, as the Province eliminated contributions towards fare initiatives and increased the contribution to the Seniors' discounts to a maximum of \$30 million. As well, the amendments to the CFSC resulted in revised fees per round trip, with the Northern Routes receiving lower maximum annual fees overall and the Minor Routes receiving higher maximum annual fees. These rate changes were based on a review of the average net loss (before ferry transportation fees) of the last fifteen years for each route.

British Columbia Ferry Services Inc.
Route Statement
Major Routes
For the Twelve Months Ended March 31, 2021
(in \$ 000's)

	01-Tsawwassen - Swartz Bay		02-Horseshoe Bay - Nanaimo		03-Horseshoe Bay - Langdale		30-Nanaimo - Tsawwassen		Major Routes	
	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	145,463	243,727	80,649	130,716	35,818	42,643	87,295	97,250	349,225	514,336
Ancillary Revenue	8,683	32,258	5,445	16,076	2,609	7,237	3,810	9,756	20,547	65,327
Social Program Fees	898	2,388	1,016	2,544	1,155	2,107	463	830	3,532	7,869
Contracted Routes Fee	-	-	-	-	-	-	-	-	-	-
Total Operating Revenue	155,044	278,373	87,110	149,336	39,582	51,987	91,568	107,836	373,304	587,532
Total Operating Expenses	135,734	181,756	90,016	117,521	50,451	52,308	109,372	98,964	385,573	450,549
Earnings (Loss) from Operations	19,310	96,617	(2,906)	31,815	(10,869)	(321)	(17,804)	8,872	(12,269)	136,983
Depreciation and Amortization	(44,707)	(50,682)	(21,476)	(26,458)	(11,405)	(10,950)	(28,135)	(23,956)	(105,723)	(112,046)
Net Financing Expense	(14,148)	(15,610)	(4,495)	(5,880)	(2,549)	(2,607)	(7,001)	(5,641)	(28,193)	(29,738)
Cost of Capital	(58,855)	(66,292)	(25,971)	(32,338)	(13,954)	(13,557)	(35,136)	(29,597)	(133,916)	(141,784)
Loss (Gain) on Disposal and Impairment of Capital Assets	(3,154)	(981)	(1,532)	(528)	(696)	(184)	(1,574)	(369)	(6,956)	(2,062)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(42,699)	29,344	(30,409)	(1,051)	(25,519)	(14,062)	(54,514)	(21,094)	(153,141)	(6,863)
Ferry Transportation Fees	2,516	6,289	1,807	3,899	1,116	5,818	1,382	2,541	6,821	18,547
Safe Restart Funding	73,928	-	39,650	-	12,935	-	29,498	-	156,011	-
Federal-Provincial Subsidy Agreement	-	-	-	-	-	-	-	-	-	-
Net Regulatory Earnings (Loss)	33,745	35,633	11,048	2,848	(11,468)	(8,244)	(23,634)	(18,553)	9,691	11,684
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	619	698	1,310	59	560	26	1,715	(8)	4,204	775
Fuel Rebates Paid	(2,252)	2,198	(1,246)	1,215	(567)	382	(1,329)	854	(5,394)	4,649
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	32,112	38,529	11,112	4,122	(11,475)	(7,836)	(23,248)	(17,707)	8,501	17,108

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Effective April 1, 2020, the CFSC was amended for PT5, formalizing ferry transportation fees for the four-year term which commenced April 1, 2020 and ends on March 31, 2024. The annual maximum ferry transportation fees for PT5 decreased by \$3.8 million compared to fiscal 2020, as the Province eliminated contributions towards fare initiatives and increased the contribution to the Seniors' discounts to a maximum of \$30 million. As well, the amendments to the CFSC resulted in revised fees per round trip, with the Northern Routes receiving lower maximum annual fees overall and the Minor Routes receiving higher maximum annual fees. These rate changes were based on a review of the average net loss (before ferry transportation fees) of the last fifteen years for each route.

BC Ferries entered into a contribution agreement with the Province dated November 11, 2020, through which it received Safe Restart Funding to primarily offset financial losses resulting from the COVID-19 pandemic. While Safe Restart Funding has been allocated across the routes using a systematic approach based on the estimated loss in earnings, no Safe Restart Funding was provided to the drop trailer business.

British Columbia Ferry Services Inc.
Route Statement
Northern Routes
For the Twelve Months Ended March 31, 2021

(in \$ 000's)

	10-Bear Cove - Bella Bella - Prince Rupert		11-Prince Rupert - Skidegate		28-Port Hardy - Bella Coola		Northern Routes	
	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	4,064	9,903	2,867	5,417	94	1,724	7,025	17,044
Ancillary Revenue	1,007	2,844	884	1,641	4	91	1,895	4,576
Social Program Fees	227	386	441	561	1	3	669	950
Contracted Routes Fee	-	-	-	-	-	-	-	-
Total Operating Revenue	5,298	13,133	4,192	7,619	99	1,818	9,589	22,570
Total Operating Expenses	21,014	25,794	16,020	19,478	7,047	7,484	44,081	52,756
Earnings (Loss) from Operations	(15,716)	(12,661)	(11,828)	(11,859)	(6,948)	(5,666)	(34,492)	(30,186)
Depreciation and Amortization	(8,332)	(9,171)	(6,375)	(7,292)	(4,528)	(5,036)	(19,235)	(21,499)
Net Financing Expense	(3,412)	(3,563)	(2,624)	(2,618)	(1,925)	(300)	(7,961)	(6,481)
Cost of Capital	(11,744)	(12,734)	(8,999)	(9,910)	(6,453)	(5,336)	(27,196)	(27,980)
Loss (Gain) on Disposal and Impairment of Capital Assets	(57)	(42)	(69)	(20)	17	(7)	(109)	(69)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(27,517)	(25,437)	(20,896)	(21,789)	(13,384)	(11,009)	(61,797)	(58,235)
Ferry Transportation Fees	30,489	35,341	19,939	28,123	4,351	6,170	54,779	69,634
Safe Restart Funding	3,004	-	1,643	-	523	-	5,170	-
Federal-Provincial Subsidy Agreement	1,597	1,563	6,621	6,478	-	-	8,218	8,041
Net Regulatory Earnings (Loss)	7,573	11,467	7,307	12,812	(8,510)	(4,839)	6,370	19,440
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS								
Fuel Costs Deferred	334	46	251	32	19	16	604	94
Fuel Rebates Paid	(68)	-	(56)	-	(1)	-	(125)	-
Provincial Contributions to Fuel Deferral Accounts	(230)	-	-	-	-	-	(230)	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	7,609	11,513	7,502	12,844	(8,492)	(4,823)	6,619	19,534

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British Columbia Ferry Services Inc.

Route Statement

Minor Routes

For the Twelve Months Ended March 31, 2021

(in \$ 000's)

	04-Swartz Bay - Fulford Harbour		05-Swartz Bay - Gulf Islands		06-Vesuvius Bay - Crofton		07-Saltery Bay - Earls Cove		08-Horseshoe Bay - Snug Cove	
	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	5,142	6,501	4,802	5,370	4,428	4,783	5,605	6,269	8,165	9,532
Ancillary Revenue	177	313	167	500	9	16	138	401	382	584
Social Program Fees	310	543	411	548	212	374	175	350	568	1,000
Total Operating Revenue	5,629	7,357	5,380	6,418	4,649	5,173	5,918	7,020	9,115	11,116
Total Operating Expenses	12,072	11,964	24,387	21,838	8,518	7,109	15,295	14,324	17,394	16,137
Earnings (Loss) from Operations	(6,443)	(4,607)	(19,007)	(15,420)	(3,869)	(1,936)	(9,377)	(7,304)	(8,279)	(5,021)
Depreciation and Amortization	(3,786)	(2,816)	(6,312)	(6,337)	(1,570)	(1,829)	(3,369)	(3,225)	(4,212)	(4,234)
Net Financing Expense	(1,207)	(889)	(1,662)	(2,160)	(180)	(230)	(1,233)	(1,293)	(1,222)	(1,114)
Cost of Capital	(4,993)	(3,705)	(7,974)	(8,497)	(1,750)	(2,059)	(4,602)	(4,518)	(5,434)	(5,348)
Loss (Gain) on Disposal and Impairment of Capital Assets	32	(44)	(95)	(23)	(82)	177	(104)	(25)	(160)	(39)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(11,404)	(8,356)	(27,076)	(23,940)	(5,701)	(3,818)	(14,083)	(11,847)	(13,873)	(10,408)
Ferry Transportation Fees	7,549	3,779	20,677	18,563	2,795	3,712	13,569	13,007	8,686	7,389
Safe Restart Funding	1,971	-	1,629	-	1,451	-	1,902	-	2,891	-
Federal-Provincial Subsidy Agreement	1,411	1,381	4,443	4,348	13	13	2,948	2,884	1,497	1,465
Net Regulatory Earnings (Loss)	(473)	(3,196)	(327)	(1,029)	(1,442)	(93)	4,336	4,044	(799)	(1,554)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	146	(7)	388	68	59	(2)	228	(5)	208	1
Fuel Rebates Paid	(100)	66	(96)	55	(84)	47	(99)	67	(142)	80
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	(427)	(3,137)	(35)	(906)	(1,467)	(48)	4,465	4,106	(733)	(1,473)

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British Columbia Ferry Services Inc.

Route Statement

Minor Routes

For the Twelve Months Ended March 31, 2021

(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	
	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	10,681	14,981	1,116	1,952	149	152	8,513	10,765	1,234	1,231
Ancillary Revenue	741	2,222	(1)	9	18	20	338	1,229	22	31
Social Program Fees	122	223	2	4	3	4	652	1,157	113	189
Total Operating Revenue	11,544	17,426	1,117	1,965	170	176	9,503	13,151	1,369	1,451
Total Operating Expenses	18,094	22,746	2,364	3,668	734	627	16,717	15,574	7,356	5,828
Earnings (Loss) from Operations	(6,550)	(5,320)	(1,247)	(1,703)	(564)	(451)	(7,214)	(2,423)	(5,987)	(4,377)
Depreciation and Amortization	(7,178)	(7,375)	(1,197)	(1,517)	(12)	(7)	(6,440)	(5,258)	(2,777)	(986)
Net Financing Expense	(3,398)	(3,461)	(169)	(199)	0	0	(3,387)	(2,940)	(1,530)	(411)
Cost of Capital	(10,576)	(10,836)	(1,366)	(1,716)	(12)	(7)	(9,827)	(8,198)	(4,307)	(1,397)
Loss (Gain) on Disposal and Impairment of Capital Assets	(220)	(62)	(20)	(7)	(3)	(1)	(167)	(46)	(27)	(5)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(17,346)	(16,218)	(2,633)	(3,426)	(579)	(459)	(17,208)	(10,667)	(10,321)	(5,779)
Ferry Transportation Fees	13,758	12,397	1,979	1,757	547	368	11,599	9,627	6,713	4,820
Safe Restart Funding	4,544	-	592	-	46	-	3,265	-	374	-
Federal-Provincial Subsidy Agreement	2,603	2,547	-	-	81	79	2,041	1,997	1,138	1,114
Net Regulatory Earnings (Loss)	3,559	(1,274)	(62)	(1,669)	95	(12)	(303)	957	(2,096)	155
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	1	117	16	-	-	(17)	49	93	65	(2)
Fuel Rebates Paid	(172)	136	(26)	20	(2)	1	(161)	116	(24)	12
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	3,388	(1,021)	(72)	(1,649)	93	(28)	(415)	1,166	(2,055)	165



British Columbia Ferry Services Inc.

Route Statement

Minor Routes

For the Twelve Months Ended March 31, 2021

(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	
	2021	2020	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	4,755	5,168	1,149	1,293	3,135	3,365	1,485	1,604	4,689	5,297
Ancillary Revenue	36	33	2	4	21	26	15	36	45	56
Social Program Fees	256	500	74	248	158	278	6	18	270	504
Total Operating Revenue	5,047	5,701	1,225	1,545	3,314	3,669	1,506	1,658	5,004	5,857
Total Operating Expenses	8,852	8,136	4,495	5,158	5,820	6,012	4,452	3,830	10,186	9,472
Earnings (Loss) from Operations	(3,805)	(2,435)	(3,270)	(3,613)	(2,506)	(2,343)	(2,946)	(2,172)	(5,182)	(3,615)
Depreciation and Amortization	(2,518)	(2,431)	(1,604)	(1,676)	(2,515)	(2,408)	(1,578)	(1,302)	(2,047)	(1,712)
Net Financing Expense	(385)	(450)	(440)	(483)	(1,289)	(1,324)	(665)	(617)	(343)	(363)
Cost of Capital	(2,903)	(2,881)	(2,044)	(2,159)	(3,804)	(3,732)	(2,243)	(1,919)	(2,390)	(2,075)
Loss (Gain) on Disposal and Impairment of Capital Assets	(89)	(20)	(22)	(5)	(58)	(13)	(26)	(6)	(342)	(21)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(6,797)	(5,336)	(5,336)	(5,777)	(6,368)	(6,088)	(5,215)	(4,097)	(7,914)	(5,711)
Ferry Transportation Fees	5,069	4,119	5,228	4,661	5,919	4,826	3,788	3,771	6,398	4,434
Safe Restart Funding	1,568	-	392	-	1,021	-	486	-	1,607	-
Federal-Provincial Subsidy Agreement	755	739	1,120	1,096	1,076	1,053	900	881	802	785
Net Regulatory Earnings (Loss)	595	(478)	1,404	(20)	1,648	(209)	(41)	555	893	(492)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS										
Fuel Costs Deferred	72	(1)	33	(1)	13	(1)	7	-	90	(3)
Fuel Rebates Paid	(87)	44	(23)	12	(59)	33	(26)	17	(86)	47
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	580	(435)	1,414	(9)	1,602	(177)	(60)	572	897	(448)



British Columbia Ferry Services Inc.

Route Statement

Minor Routes

For the Twelve Months Ended March 31, 2021

(in \$ 000's)

	24-Cortes Island - Quadra Island		25-Alert Bay - Sointula - Port Mcneill		26-Skidegate - Alliford Bay		Minor Routes	
	2021	2020	2021	2020	2021	2020	2021	2020
Tariff and Reservation Revenue	911	1,034	1,456	1,741	412	784	67,827	81,822
Ancillary Revenue	5	17	16	17	9	8	2,140	5,522
Social Program Fees	108	173	90	189	19	44	3,549	6,346
Total Operating Revenue	1,024	1,224	1,562	1,947	440	836	73,516	93,690
Total Operating Expenses	3,943	4,228	7,164	6,877	5,377	4,223	173,220	167,751
Earnings (Loss) from Operations	(2,919)	(3,004)	(5,602)	(4,930)	(4,937)	(3,387)	(99,704)	(74,061)
Depreciation and Amortization	(2,066)	(2,136)	(3,815)	(2,650)	(1,587)	(1,626)	(54,583)	(49,525)
Net Financing Expense	(486)	(563)	(1,949)	(1,312)	(436)	(472)	(19,981)	(18,281)
Cost of Capital	(2,552)	(2,699)	(5,764)	(3,962)	(2,023)	(2,098)	(74,564)	(67,806)
Loss (Gain) on Disposal and Impairment of Capital Assets	(18)	(4)	(27)	(7)	(8)	(3)	(1,436)	(154)
Route Earnings (Loss) Before Ferry Service Fees, Safe Restart Funding & Federal Contract	(5,489)	(5,707)	(11,393)	(8,899)	(6,968)	(5,488)	(175,704)	(142,021)
Ferry Transportation Fees	5,128	2,977	7,463	4,851	5,761	4,766	132,626	109,824
Safe Restart Funding	314	-	528	-	238	-	24,819	-
Federal-Provincial Subsidy Agreement	709	694	1,152	1,127	1,121	1,096	23,810	23,299
Net Regulatory Earnings (Loss)	662	(2,036)	(2,250)	(2,921)	152	374	5,551	(8,898)
Items Included in Regulatory Earnings (Loss) not Permitted Under IFRS								
Fuel Costs Deferred	45	-	96	3	27	(1)	1,543	242
Fuel Rebates Paid	(18)	12	(30)	19	(7)	7	(1,242)	791
Provincial Contributions to Fuel Deferral Accounts	-	-	-	-	-	-	-	-
Tariffs in Excess of Price Cap	-	-	-	-	-	-	-	-
Net IFRS Earnings (Loss)	689	(2,024)	(2,184)	(2,899)	172	380	5,852	(7,865)

Part 2

Service Quality



Part 2: Service Quality

Overview

The Company 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 safely and reliably connects and supports communities, brings families together, meets passengers' needs, engages with Indigenous peoples, moves essential goods, supports agriculture and tourism, and builds and strengthens the provincial economy.

BC Ferries receives customer-initiated feedback through letters, emails, phone calls, tweets, Facebook posts, Instagram and the online feedback form. The Company also receives feedback through its customer satisfaction survey and its feedback portal, ferryfeedback.ca. 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.¹²

BC Ferries has an active public consultation and community engagement program. Transparent public engagement is the Company's way to ensure the community has a voice in the future of the ferry system and the decisions that affect them most. BC Ferries' public engagement program is a critical component of its infrastructure planning, service planning, project management and ongoing operations.

BC Ferries regularly meets with communities, Indigenous Peoples, businesses 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 to provide input on day-to-day operations, planned improvements, broader policy issues and strategic planning.

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.

The Company is building relationships with Indigenous groups and sharing ideas to integrate cultural elements at the terminal sites and on its vessels. To support terminal development projects and planning at locations throughout BC Ferries' networks, BC Ferries consults Indigenous leaders to inform them of development plans, and address project-specific concerns.

This part of the report provides information on the feedback BC Ferries received

¹² During the fiscal year BC Ferries made a number of changes in support of the customer complaints process, in response to recommendations from a performance review by the Commissioner under section 46.1 of the Act.

from its customers in fiscal 2021, as well as the key stakeholder and community engagement initiatives it undertook during the year. The following two reports are included:

2.1 Feedback and Engagement Report

The Feedback and Engagement 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 a summary for the fiscal year of Indigenous relations and engagement activities, as well as an overview of key community and stakeholder engagement initiatives and the themes that emerged from those consultation processes.

2.2 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 customer service initiatives.

The Customer Service Satisfaction Tracking report presents the findings for 2020. The report indicates that customers who were surveyed reported an overall satisfaction score of 3.97 (out of a possible 5), and 81% of those customers reported that they were satisfied with their overall experience. This compares to 4.09 and 85%, respectively, for 2019.¹³ A copy of the 2020 Customer Satisfaction Tracking annual report is provided.

¹³ It is reasonable to assume that the overall satisfaction score would have been higher if not for the COVID-19 pandemic. Amenities that provide a more enjoyable sailing experience – such as the child play areas, the Pacific Buffet and the Seawest Lounge – were unavailable due to COVID-19-related precautions. Further, annual scores are likely to have been negatively impacted by the lack of international tourists (due to government travel restrictions) and the cancelling of the June intercept period due to the pandemic.

Feedback and Engagement Report

Year Ended March 31, 2021



Feedback and Engagement Report

Year ended March 31, 2021 (Fiscal 2021 – Annual Report)

Feedback and Engagement Report

Fiscal 2021

Executive Summary

CUSTOMERS SERVED



13.1 million customers travelled with BC Ferries in Fiscal 2021, compared to 21.7 million in Fiscal 2020 (40% reduction in passenger volume).

CUSTOMER ENGAGEMENT

	Fiscal 2020	Fiscal 2021	YOY Change	
Comments Received	10,974	11,870	8%	↑
Phone Calls Received	474,637	358,912	24%	↓
Social Media (Inbound)	32,226	40,884	27%	↑
Twitter	22,132	26,993	22%	↑
Facebook	8,905	12,272	38%	↑
Instagram	1,037	1,413	36%	↑
LinkedIn	152	206	36%	↑

COMMUNITY ENGAGEMENT*



In Fiscal 2021, 5,800 people participated in community engagement activities, compared to 16,600 in Fiscal 2020.

65%
↓

FISCAL 2021 EVENTS

The COVID-19 pandemic was the main driver of events and issues that occurred in Fiscal 2021. Following the significant drop in traffic early in Q1 Fiscal 2021, service between Horseshoe Bay-Departure Bay and between Brentwood Bay-Mill Bay was temporarily suspended. Service on these routes was subsequently restored in June 2020. Traffic on the Horseshoe Bay-Langdale route returned quickly, leading to a series of schedule changes to meet demand.

Each provincial government travel restriction announcement led to significant decreases in traffic and increases in reservation cancellations; all fees continued to be waived if travel was during restricted periods.

The Transport Canada regulation related to closed car decks was temporarily relaxed between March 18, 2020 and September 30, 2020, allowing customers to maintain physical distancing by remaining in their vehicles. When the regulation was re-implemented on September 30, 2020, Transport Canada provided approval for customers travelling on the Horseshoe Bay-Langdale route to remain in their vehicles during sailings.

On July 30, 2020, Ministerial Order (M084), which had been in place since March 26, 2020, was amended to remove reference to resident loading priority. Essential goods and services continue to receive priority loading under the Order until the declaration of the state of emergency is lifted.

Also on July 30, 2020, BC Ferries' Medical Assured Loading Program was redefined by the Province, under Ministerial Order (M256), to give medical practitioners the ability to directly issue a patient an assured loading letter for travel on BC Ferries to and from medical appointments that met criteria set out in the Order.

Our new website, launched September 22, 2020, generated the most feedback unrelated to the pandemic in Fiscal 2021. We are making website improvements to respond to feedback and enhance the customer experience.

On June 10, 2020, the *Island Discovery* entered service on Route 18 between Powell River-Texada. On June 18, 2020 the *Island Aurora* entered service on Route 25 between Port McNeill-Alert Bay-Sointula.

On February 22, 2021, we announced the fifth Salish Class vessel, the *Salish Heron*. The vessel will begin serving the Southern Gulf Islands in 2022; we are consulting with communities to enhance ferry service through schedule adjustments.

On March 3, 2021, we launched our new fare choices, *Saver* and *Prepaid*, in addition to pre-existing *Reservation Only* and *At Terminal*/fares. These new fares are available on sailings between Vancouver and Vancouver Island. Customer uptake has been strong, with mainly positive feedback.

TREND HIGHLIGHTS (all comparisons made to Fiscal 2020)

CUSTOMER SATISFACTION TRACKING TRENDS

- ↓ **0.12-point decrease** in overall customer satisfaction score
↓ **10-point decrease** in Net Promoter Score™



81%

of passengers surveyed in 2020 were satisfied with their overall experience
(YOY Change: -4%)

CUSTOMER RELATIONS TRENDS

- ↓ **33% decrease** in the number of positive comments
↑ **7% improvement** in average response time

Complaints/10,000 Passengers

5.1

YOY Change: Complaints are UP
(Fiscal 2020: 3.3)

Stale Response Resolution

32.7%

% of customers who did not receive a response within the target # of days

OPERATIONS TRENDS

- ↓ **0.3% decrease** in on-time vessels
↓ **0.5% decrease** in fleet reliability

CUSTOMER SERVICE CENTRE (CSC) CALL TRENDS

- ↓ Call answer times were **5.2 times slower**
↑ **1.4% increase** in first call resolution

93%

of customers were satisfied with their CSC experience

*Number of participants is dependent on the number of active engagement projects in the communities. This varies throughout the fiscal year.

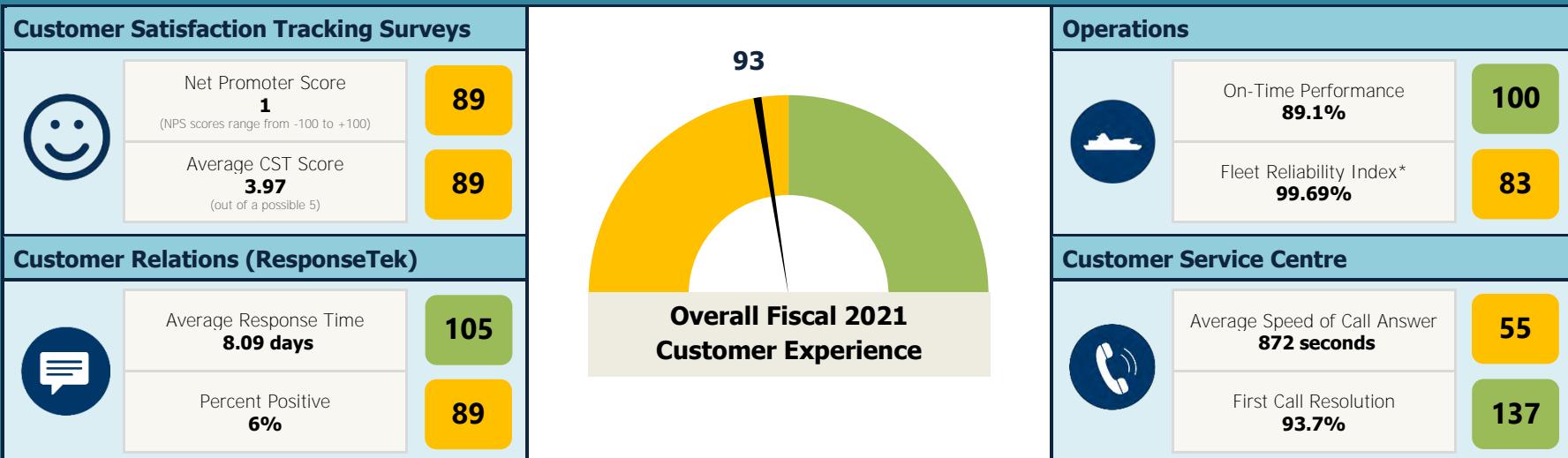
Customer Experience Dashboard

Fiscal 2021

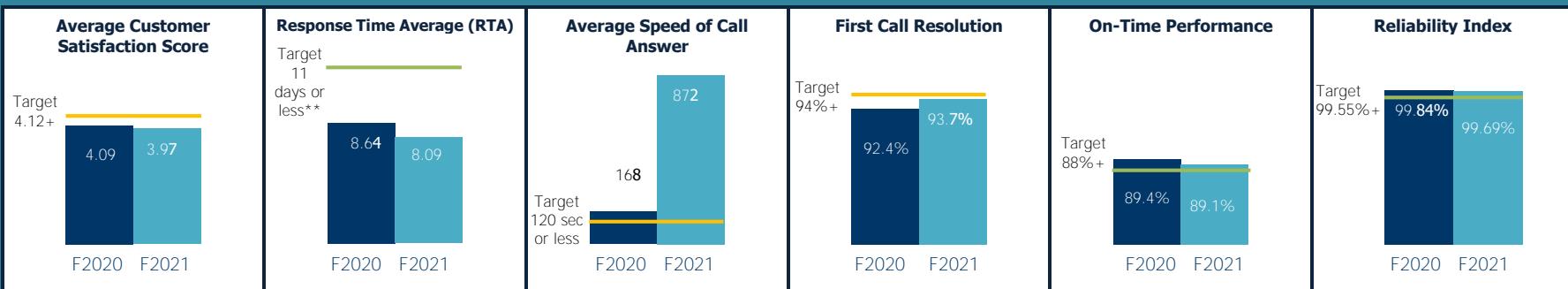
Annual Results

Overall Customer Experience

The Overall Customer Experience performance score is a single summary measure that is calculated using **eight different measures[†]** from four different information sources. A score of 100 means that BC Ferries' performance this year is equivalent to the average performance over the previous four years (Fiscal 2017–Fiscal 2020). A score lower than 100 indicates a lower-than-average performance, and a score greater than 100 indicates that this year's performance is better than average.



Current Performance Relative to Fiscal 2020 and Targets



*Figure based on agreed contracted service with the province of BC during the pandemic. Note: On-time performance and fleet reliability are based on all BC Ferries routes, including Route 13, which is operated by an alternative service provider under contract to BC Ferries. **To address the shift in the Response Time Average (RTA) target that occurs between Q1/Q2 and Q3/Q4 (from 14 days to 7 days, respectively), a weighted annual target was developed. The weighted target considers the proportion of traffic in each quarter and weights the target accordingly. †See methodology on next page.

Methodology

The Overall Customer Experience performance score is a composite measure that is calculated using eight individual measures from four different information sources. The Overall Customer Experience performance score is represented by the dial score (on the previous page).

One of the primary advantages of using a composite measure is that it provides a comprehensive perspective of a quality, which in this case is **customer experience**. A customer's experience is multi-faceted, so it needs to be calculated using multiple measures that tap into the different aspects of customer experience.

R.A. Malatest & Associates Ltd., an independent research firm that is also working in consultation with BC Ferries senior staff on the CST Research Program, selected the following eight customer experience measures, which all contribute equally to a single global performance score:

Information Source	Measure	Relative Weight
Customer Satisfaction Intercept Surveys	Net Promoter Score	12.5%
	Average Customer Satisfaction Score	12.5%
Operational Data	On-Time Performance (OTP)	12.5%
	Fleet Reliability Index	12.5%
Customer Relations (ResponseTek)	Response Time Average	12.5%
	Percent Positive Feedback	12.5%
Customer Service Centre	Average Speed of Call Answer (ASA)	12.5%
	First Call Resolution (FCR)	12.5%

On-Time Performance (OTP): Percentage of sailings departing or arriving, as applicable, within 10 minutes of the scheduled time.

Fleet Reliability Index: Percentage of sailings not cancelled due to controllable events.

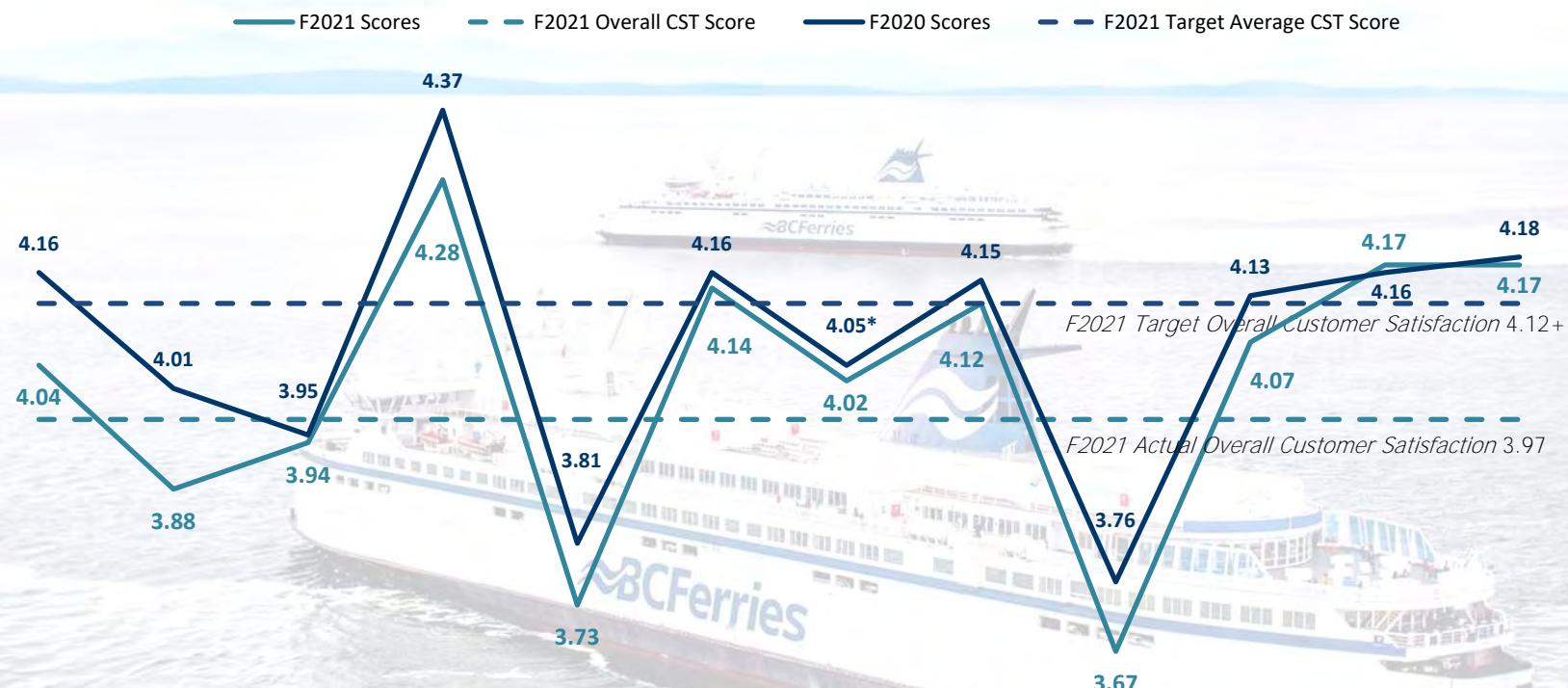
How is the Overall Customer Experience Performance Score Calculated?

The measures that are used to build the composite measure include count data, 5-point Likert-style scales, and percentage scores. To be able to achieve a single unified measure, each score is standardized (using z-scores) and then converted to a 100-point scale. To limit the impact of extreme outliers on the overall performance score, z-score values are capped at +/- 3.0.

An Overall Performance score of 100 means that BC Ferries' performance is equivalent to average performance over the past four years. Scores greater than 100 signal an improvement in performance, while lower-than-average performance is indicated by scores below 100.

Passenger Satisfaction throughout the BC Ferries Journey

Fiscal 2021



The green dotted line represents the Overall Satisfaction Score for passengers in 2020. Looking at the whole journey, passenger "high points" include the check-in process (4.28), the look of the vessel (4.19) and the unloading procedure (4.18). Passenger "low points" include onboard food services (3.67) and wait time at the terminal (3.73). These highs and lows are similar to what was identified in 2019. The 2020 pattern of results follows that of 2019; however, scores are lower across all categories (with the exception of the look of the vessel and unloading procedure, which are almost the same).

*The 2019 Terminal Services score was updated due to a change in methodology. Historically, passengers have evaluated the food/beverage services and merchandise services offered nearby (e.g., amenities in the village of Horseshoe Bay). A decision was made in 2020 to only ask this question of passengers departing from the Tsawwassen, Swartz Bay and Departure Bay terminals. The 2019 score was recalculated to ensure its formulation matches this new method.

Customer Satisfaction Tracking

Fiscal 2021

Intercept Surveys (All Waves)

Overall Customer Satisfaction Score

3.97/5

Fiscal 2020: 4.09

Overall Customer Satisfaction

81%

Fiscal 2020: 85%

Net Promoter Score (NPS)

1

Fiscal 2020: 11

The overall customer satisfaction score experienced a decline when compared to **last year's score** (a change of -0.12 points). Analysis by route shows that passengers on Route 4 are the most satisfied with their overall experience (4.18), while passengers travelling on Route 3 are the least satisfied (3.70).

The shifts in the Overall Customer Satisfaction Scores YOY for each route are:

Route	F2020	F2021	Change	
5/9	3.97	4.09	+0.12	▲
4	4.08	4.18	+0.10	▲
30	4.12	4.08	-0.04	▼
1	4.16	4.07	-0.09	▼
2	4.08	3.94	-0.14	▼
19	3.99	3.76	-0.23	▼
3	4.02	3.70	-0.32	▼

It is reasonable to assume that the overall satisfaction score in Fiscal 2021 would have been higher if not for the COVID-19 pandemic. Amenities that provide a more enjoyable sailing experience – such as the child play areas, the Pacific Buffet and the Seawest Lounge – were unavailable, due to COVID-19-related precautions. Further, annual scores are likely to have been negatively impacted by the lack of international tourists (due to government travel restrictions) and the cancelling of the June intercept period.

Question asked: How satisfied, or dissatisfied, were you, overall, with your recent experience travelling with BC Ferries?

Source: All Waves 2020 CST Survey

Service Areas with Largest YOY Changes

LARGEST INCREASES

Service Area	F2020	F2021	Change
Parking options at the terminal	3.43	3.70	+0.27
Ease of using passenger drop-off/pickup area	3.95	4.10	+0.15
Pre-boarding passenger lounge at terminal	3.79	3.86	+0.07

Source: All Waves 2020 CST Survey

LARGEST DECREASES

Service Area	F2020	F2021	Change
BC Ferries phone service	3.59	3.32	-0.27
Usefulness of BC Ferries website	4.13	3.96	-0.17
Atmosphere on the ferry overall	4.21	4.04	-0.17

Source: All Waves 2020 CST Survey

Customer Satisfaction Trends

Central and North Coast (Routes 10 and 11)

Fiscal 2021

Note: Customer Satisfaction Tracking data for the central and north coast is collected throughout the year via a post-travel survey that is emailed to customers travelling on these routes. This data collection method is used instead of onboard intercepts.

Overall Satisfaction

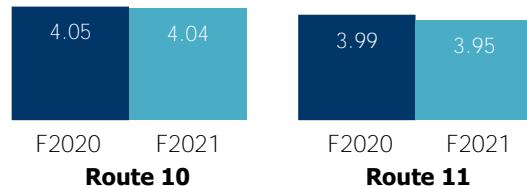
Year-over-year comparisons of overall satisfaction scores suggest that satisfaction has decreased for passengers on both Route 10 (-0.26) and Route 11 (-0.21).

Scores range from 1–5. 1 = Very dissatisfied, 5 = Very satisfied.



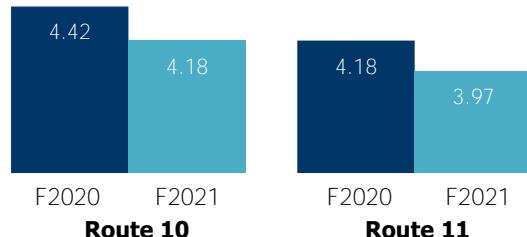
Terminal Satisfaction

Year-over-year comparisons of terminal satisfaction scores suggest that satisfaction has stayed practically the same for passengers on Route 10 (-0.01) but has declined slightly for those travelling on Route 11 (-0.04).



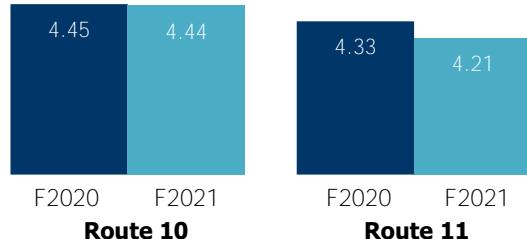
Onboard Satisfaction

Year-over-year comparisons of onboard satisfaction scores suggest that satisfaction has decreased for passengers on both Route 10 (-0.24) and Route 11 (-0.21).



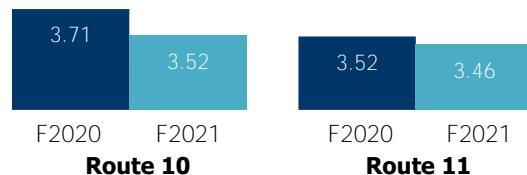
Safety of Ferry Operations

Year-over-year comparisons of satisfaction levels with safety of ferry operations suggest that passengers' rating of safety has stayed practically the same on Route 10 (-0.01), but has declined somewhat on Route 11 (-0.12).



Value for Money of Fares

Year-over-year comparisons of passenger assessments of value for money of fares suggest that passengers' ratings have decreased on both northern routes; however, Route 10 (-0.19) saw a larger decrease than Route 11 (-0.06).



Customer Relations (ResponseTek)

Fiscal 2021

Vancouver Island – Mainland (Routes 1, 2 and 30)

COMPLAINTS/
10,000 PASSENGERS*

5.3

YOY CHANGE: Complaints are UP
(Fiscal 2020: 3.4)

In Fiscal 2021, there were **3,938** total complaints received regarding these routes. Customer concerns were mainly related to COVID-19 and fares.

The Transport Canada closed vehicle deck regulation was temporarily relaxed between March 18, 2020 and September 30, 2020 to assist customers with maintaining physical distancing by remaining in their vehicles.

Service between Horseshoe Bay and Departure Bay was temporarily suspended between April 4 and June 3, 2020.

On March 26, 2020, the Province enacted Ministerial Order (M084) under the *Emergency Program Act*, which provided priority loading for residents and essential goods and supplies. Holders of Assured Loading Tickets (ALTs) were advised on June 4, 2020 that tickets may be restricted on certain sailings, due to the requirement to provide priority to residents and essential goods and supplies. On July 30, 2020, the Province amended M084 to remove priority loading for residents, which eased vehicle staging pressures at terminals. In mid-October, restrictions regarding the use of ALTs were lifted.

On November 7, 2020, the Provincial Health Officer, Dr. Bonnie Henry, announced that travel was limited to essential travel only to and from the Lower Mainland through November 23, 2020. These travel restrictions were later extended to the entire province. Ministerial Orders M172, M182 and M212 were introduced, prohibiting all but essential travel between specific provincial health regions.

We began offering new fare choices on our Mainland-Vancouver Island routes starting March 3, 2021. Customers now have various fare options, depending on when they book and what fares are available.

TOP 3 COMPLAINT AREAS (56% of all complaints)

27%
of all
complaints

COVID-19-Related Complaints (n=1,050)

Onboard/Terminal Safety (n=421)
(Check-in screening, cleaning, physical distancing, face masks)
COVID-19 Travel Refunds (n=102)
(Refund requests associated with cancelled travel due to travel restrictions)
Service Reductions/Cancellations (n=83)

- Passenger screening for COVID-19 symptoms, frequent cleaning of high-touch areas, physical barriers, and prompts and reminders regarding physical distancing were put in place in Q1 of Fiscal 2021; face masks became mandatory for everyone at terminals and on vessels in August 2020
- Multiple Provincial Health Officer announcements were acted on throughout Fiscal 2021, and several Ministerial Orders required essential travel only, resulting in customers cancelling their bookings and a dramatic decrease in traffic; cancellation and change fees were waived for customers amending travel plans as a result of the restrictions
- Throughout Fiscal 2021, sailing reductions, including the suspension of service between Horseshoe Bay-Departure Bay, were made in response to the significant decline in traffic; sailings were added back into the schedule when and where appropriate to meet traffic demand

15%
of all
complaints

Fares/Fare Errors (n=608)

Incorrect Fare Charged (n=273)
(Vehicle type, vehicle length, senior rate, child rate)
Double-charged (n=157)
No Show Fee (n=57)
(Charged in error)

- Confusion about the new fare rules or fare errors were handled by providing refunds or travel vouchers on a case-by-case basis. Online messaging about terms and conditions related to the new fares was improved. System issues were reported to our technical team.
- On occasion, when ticket agents have not redeemed a reservation, a customer will be charged a no-show fee. These were refunded following confirmation of customer travel. One customer thought bookings were redeemed by scanning their licence plate, and others were not aware they needed to advise the ticket agent at check-in that they had a booking – clarification was provided.

14%
of all
complaints

Customer Service (n=567)

Ticket Agent/Check-in Complaints (n=238)
(Unpleasant/confrontational interaction, unhelpful staff, misinformation)
Phone Service Complaints (n=81)
(Wait times to speak to agent)
Onboard Staff Complaints (n=70)
(Unpleasant/confrontational interaction, unhelpful staff)

- Misunderstandings between customers and staff seem to have been caused by a combination of COVID-19 precautions (plexiglass barriers and masks), vehicle noise and the learning curve related to the new fare choices
- Speaker systems were installed at ticket booths, but communication continues to be a challenge in some locations: customers can step aside for direct communication if additional clarity is required
- Employee conduct concerns were shared as appropriate for internal review and follow up
- Wait times to reach an agent were occasionally longer than expected. Staff who were previously furloughed due to COVID-19 were rehired. In addition, by the end of July, seven returning seasonal employees and 10 new seasonal staff were answering calls in the Customer Service Centre.

YOY CHANGE: Complaints are DOWN

Fiscal 2020 Comparison: 21%

YOY CHANGE: Complaints are DOWN

Fiscal 2020 Comparison: 18%

* COVID-19-related complaints are not included in the Complaints/10,000 passengers calculations.

Note: 'n' values represent the count of complaints within each complaint area (customer service, fares, COVID-19, etc.). 'n' values not represented within a complaint area are 'other' comments related to the complaint area that do not fit a common theme or category.

Customer Relations (ResponseTek)

Fiscal 2021

Sunshine Coast (Routes 3, 7, 8, 13, 17 and 18)

COMPLAINTS/
10,000 PASSENGERS

4.2

YOY CHANGE: Complaints are UP
(Fiscal 2020: 2.4)

In Fiscal 2021, there were **1,897** total complaints received regarding these routes, mainly related to COVID-19 and the new website.

Route 3 service levels reductions were announced on April 3, 2020 which led to the cancellation or modification of hundreds of customer bookings. The gradual reintroduction of service was announced June 5, 2020 for a number of routes, including Route 3, in response to growing traffic demand. Ongoing schedule changes generated significant call volumes from customers wanting their original bookings restored to the sailings that were initially cancelled.

Challenges were experienced at the terminals, in part due to the Ministerial Order (M084) giving priority to residents and essential goods and supplies, which caused confusion and frustration. The Ministerial Order also meant a reduction in bookable space to accommodate the volume of residential drive-up traffic. The Order was amended on July 30, 2020, and resident priority loading was rescinded.

Changes made to Medical Assured Loading (MAL) under Ministerial Order (M256) introduced in July 2020 had the greatest impact on Route 3 customers, as this route has the highest number of MAL passengers of all our routes.

Many customers in this region are daily commuters who rely heavily on the reporting of Current Conditions, Service Notices and Travel Advisories on our website. We continue to make adjustments and improvements to the website as customer feedback is collected. All relevant concerns and suggestions are shared internally and actioned where possible.

Although Transport Canada rescinded the temporary flexibility to allow customers to remain on enclosed vehicle decks on Routes 1, 2, 30, 9 and 17, we received approval to allow passengers travelling on Route 3 to remain on the lower car deck.

TOP 3 COMPLAINT AREAS (57% of all complaints)

23%
of all
complaints

COVID-19-Related Complaints (n=434)

Onboard/Terminal Safety (n=147)

(Check-in screening, cleaning, physical distancing, face masks)

Service Reductions/Cancellations (n=80)

Priority/Resident Loading (n=55)

(Restrict non-essential/out-of-province travel)

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 3%

- We increased communication through our website, our social media, news media and our Customer Service Centre to help ease confusion about the Ministerial Order (M084), the 50% reduction in passenger capacity, the screening questions and the requirement for face coverings
- Additional safety measures were put in place onboard to increase passenger capacity from the previous 50%, and schedules were adjusted to reduce sailing waits
- Early in Fiscal 2021, customers expressed frustration with reduced capacity, as it impacted their ability to get on the sailing of their choice; extended waits and delays due to the priority loading of residents and essential goods and supplies caused additional challenges with maintaining schedules before the Order was amended in late July

20%
of all
complaints

BC Ferries Website (n=386)

New Website Issues (n=277)

(New schedule format is hard to understand, website is difficult to navigate/find information)

Account Issues (n=48)

(Unable to access/update personal info or preferences, difficulty managing upcoming bookings)

Travel Advisories/Current Conditions (n=20)

(Ensure information is timely, complete and accurate)

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 5%

- Proposed changes of the schedule redesign were shared with, and supported by, the Route 3 Community Engagement Working Group, and the schedule update was implemented on April 17 to improve print functionality and schedule display
- Customers who experienced difficulty with their accounts were assisted; unresolved issues were reported to our technical team for investigation and resolution
- Changes were made to streamline the website and to improve navigation to Current Conditions from the home page

14%
of all
complaints

Advanced Bookings (n=270)

Revised/Cancelled Bookings (n=151)

(Customers unhappy with BC Ferries' handling of revised or cancelled bookings)

Availability (n=23)

(Bookings not available for desired sailings)

Booking System (n=16)

(Technical issues impeding bookings)

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 5%

- Customers impacted by sailing cancellations were moved to the next sailing when possible; those who could not be accommodated had their reservations cancelled and refunded
- Some customers experienced multiple booking changes; concerns were addressed on a case-by-case basis and compensation was provided where appropriate
- Customers who experienced difficulty with the booking system were assisted, and unresolved issues were reported to our technical team for investigation and resolution

Customer Relations (ResponseTek)

Fiscal 2021

Southern Gulf Islands (Routes 4, 5, 6, 9, 12, 19 and 20)

COMPLAINTS/
10,000 PASSENGERS

5.1

YOY CHANGE: Complaints are UP
(Fiscal 2020: 3.4)

In Fiscal 2021, there were **1,550** total complaints received regarding these routes.

The general dissatisfaction with the online viewing and printing of schedules is amplified for the Southern Gulf Islands routes, where the complexity of inter-island service both increases reliance on the schedules and makes them inherently more complicated. Southern Gulf Islands customers continued to express a preference for simple printable schedules that can aid in travel planning that may involve multiple days and/or routes. Schedule improvements were implemented on April 17, 2021, resolving most schedule issues received. There is still a pending fix to be implemented for the Route 5 schedule; in the interim, there is a manually loaded schedule published on the website to ensure accuracy.

The new website allows foot passengers to make reservations online for travel on Route 9. This was a welcome addition for customers who previously had to contact the Customer Service Centre to make foot passenger bookings during Q1 and Q2 of Fiscal 2021.

On April 8, 2020, temporary service level reductions were announced for the Southern Gulf Islands (Routes 5 and 9). Service was also temporarily suspended to Long Harbour (Route 9) and on our Brentwood Bay-Mill Bay (Route 12). Additional sailings were introduced on July 16, 2020; new safety measures, which were implemented to enable more passengers to be carried on each sailing, reduced concerns about foot passenger overloads on Route 9. However, at times, weekend sailings continued to be fully booked in advance for vehicles and foot passengers.

TOP 3 COMPLAINT AREAS (57% of all complaints)

27%
of all
complaints

BC Ferries Website (n=422)

New Website Issues (n=298)

(New schedule format is hard to understand, difficult to navigate website/find information/make bookings)

Account Issues (n=33)

(Unable to access account/update personal information or preferences, difficulty managing upcoming bookings)

Errors in Posted Schedule (n=29)

(Route 5/9)

- Schedule improvements were implemented on April 17, 2021, resolving most schedule issues received: any errors identified on the posted schedule are corrected as soon as they are identified
- As with other regions, customers experiencing difficulty with their accounts were assisted, and unresolved issues were reported to our technical team for investigation and resolution; issues that remained unresolved were often related to the customer's email service provider
- Feedback regarding the website continues to be collected and shared, and errors are actioned as required

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 4%

18%
of all
complaints

COVID-19-Related Complaints (n=280)

Onboard/Terminal Safety (n=102)

(Check-in screening, cleaning, physical distancing, face masks)

Service Reductions/Cancellations (n=71)

Enclosed Vehicle Decks (n=22)

(Passengers unhappy with Transport Canada's decision to rescind flexibility to remain on closed vehicle decks)

- Customers expressed frustration at the perceived lack of mandatory face mask policy enforcement; feedback was shared internally
- Due to COVID-19, both traffic and sailing capacity were reduced compared to previous years; however, Route 9 continued to experience popular sailing times selling out, which led to some residents being frustrated that non-residents were allowed to travel.
- Customers were provided information on how to request upper deck loading and also about the challenges of loading vessels for multi-stop sailings

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 2%

12%
of all
complaints

Customer Service (n=191)

Phone Service Complaints (n=53)

(Wait times to speak to agent)

Ticket Agent/Check-in Complaints (n=52)

(Unpleasant/confrontational interaction, unhelpful staff, misinformation)

Terminal Staff Complaints (n=24)

(Unpleasant/confrontational interaction, unhelpful staff)

- The Customer Service Centre experienced high call volumes and longer-than-normal wait times in the first half of Fiscal 2021, due to the impact of schedule changes on Route 9 and other routes, as well as website issues during the first week after the launch of the site. Seasonal staff assisted with call volumes, and support staff were in place to offer assistance to our agents with technical issues related to the website. Several non-operational staff who are trained to assist when a high volume of calls occur provided additional support.
- Employee conduct concerns were shared as appropriate for internal review and follow-up

YOY CHANGE: Complaints are DOWN

Fiscal 2020 Comparison: 15%

Customer Relations (ResponseTek)

Fiscal 2021

Northern Gulf Islands (Routes 21, 22, 23, 24 and 25)

COMPLAINTS/
10,000 PASSENGERS

1.5

YOY CHANGE: Complaints are UP
(Fiscal 2020: 1.2)

In Fiscal 2021, there were **325** total complaints received regarding these routes.

Communities served by some routes in this region expressed concern about the proposed COVID-19-related reduction of service to contracted levels with the Province in Q1 Fiscal 2021. The Province agreed to fund sailings above contract, and service remained in place throughout the summer.

Prior to the change to the Ministerial Order (M084), customers travelling on these routes expressed frustration with resident priority loading: those who qualified felt it was not being administered effectively, while those who did not qualify felt it was unfair. There was also confusion over **which customers qualified as "residents" under the Order. Customers felt that residents should be required to show proof of residence in order to receive priority boarding;** however, the definition of residency was not defined in the Order.

COVID-19 precautions – in particular, the closure of passenger lounges and the introduction of mandatory face masks – caused concern for customers. The introduction of mandatory face masks presented a challenge, because some customers held very strong opinions on whether or not they should be used. Employees used an educational approach with customers who were non-compliant.

The *Island Aurora* entered service on June 18, 2020 on Route 25, between Port McNeill-Alert Bay-Sointula. Residents expressed some concern over whether the vessel had adequate crew to deal with emergency evacuation safely and efficiently, despite Transport Canada-established crewing levels.

Similar to other minor route customers, Northern Gulf Islands customers were looking for changes to the schedule layout to display sailing departures in both directions and to include dangerous goods sailing information. Feedback was gathered and used to enhance schedule design, with implementation on April 17, 2021.

TOP 3 COMPLAINT AREAS (60% of all complaints)

26%
of all
complaints

COVID-19-Related Complaints (n=86)
Onboard/Terminal Safety (n=34)
(Enforce face mask use among passengers and staff)
Priority/Resident Loading (n=16)
(Restrict non-essential/out-of-province travel)
Service Reductions/Cancellations (n=12)

YOY CHANGE: Complaints are UP
Fiscal 2020 Comparison: 5%

- Our mandatory face mask policy resulted in a mix of customer feedback; some customers felt we were not enforcing the policy enough, while others felt we were being too strict
- Customers expected that BC Ferries would prevent non-essential travel to limit the spread of COVID-19 to their communities; while we are not legally authorized to restrict travel, through all our communications channels, we strongly encouraged customers to travel for essential reasons only
- Service reduction concerns in early Fiscal 2021 were alleviated when the Province agreed to fund sailings over service contract levels throughout the summer of 2020. We increased communication about this through our website, our social media, news media and our Customer Service Centre to help ease confusion about the Ministerial Order (M084), the 50% reduction in passenger capacity, the screening questions and the requirement for face coverings.

20%
of all
complaints

BC Ferries Website (n=66)
New Website Issues (n=32)
(New schedule format is hard to understand, website is difficult to navigate/find information)
Service Notices (n=11)
(Ensure information is timely, complete and accurate)
Account Issues (n=8)
(Unable to access account/update personal information or preferences)

YOY CHANGE: Complaints are UP
Fiscal 2020 Comparison: 4%

- A redesigned schedule format was implemented online on April 17, 2020
- When a service interruption occurs, information is communicated as soon as possible through Twitter and Service Notices; resolution of the Service Notice email distribution delays is in development and is expected to be in place by July 2021
- Most account issues were fixed within the first week of the website launch; customers who continued to experience difficulty with their accounts were assisted, and unresolved issues were reported to Information Technology

14%
of all
complaints

Sailings/Schedules (n=45)
Sailing Waits/Delays (n=15)
(Frequency of delays and waits between sailings)
Mechanical Issues Route 21 (n=10)
(Interruptions to service levels as a result of mechanical issues with the Baynes Sound Connector)

YOY CHANGE: Complaints are DOWN
Fiscal 2020 Comparison: 26%

- Sailing waits and delays tend to occur during the busy summer months; during peak travel periods, vessels entered shuttle mode when necessary, in order to clear traffic
- A handful of mechanical issues throughout Fiscal 2021 caused cancellations of scheduled *Baynes Sound Connector* sailings on the Buckley Bay-Denman Island route (Route 21) and of the *Kahloke* on the Hornby Island-Denman Island route (Route 22). Where possible, complimentary water taxi and shuttle service to Courtenay and Comox was provided, and regular service was resumed as quickly as possible. Compensation or reimbursement was provided on a case-by-case basis where appropriate.

Customer Relations (ResponseTek)

Fiscal 2021

Central and North Coast (Routes 10, 11, 26, 28 and 28a)

COMPLAINTS/
10,000 PASSENGERS

20.5

YOY CHANGE: Complaints are UP
(Fiscal 2020: 9.7)

In Fiscal 2021, there were **195** total complaints received regarding these routes.

Due to ongoing concerns about the spread of COVID-19, several northern First Nations communities put travel advisories in place at the beginning of Fiscal 2021 to limit access to their local communities. Throughout the summer, ferry service remained at winter service levels, with one-ship operation on the routes connecting Port Hardy, Prince Rupert and Haida Gwaii (Routes 10 and 11).

Priority was given to residents and to essential goods and supplies going to these northern communities. In early Fiscal 2021, most tour and travel agent bookings were cancelled for the summer season. Most hotels announced their temporary closures by mid-May.

Before the new website was launched in September 2020, customers were frustrated about the inability to make or cancel reservations online, as call volumes into the Customer Service Centre were high and there were long call wait times during peak periods. The new website now allows customers to self-serve by booking and managing their northern travel and amenities online.

Service interruptions related to mechanical issues, weather and COVID-19 occurred in Fiscal 2021. On bookable routes, customers were moved to the next available sailings when possible, or provided with refunds if they could not be moved. Reimbursement of expenses and compensation were provided on a case-by-case basis for mechanical cancellation and delays. Staff on our northern vessels were given the opportunity to be vaccinated on a priority basis.

TOP 3 COMPLAINT AREAS (55% of all complaints)

21%
of all
complaints

Advanced Bookings (n=40)

Revised/Cancelled Bookings (n=10)

(Customers unhappy with BC Ferries' handling of revised or cancelled bookings)

Improve Northern Routes Booking System (n=9)

Booking System/Account Issues (n=8)

(Technical issues impeding bookings/account access)

- While northern route sailings typically have passenger capacity available, vehicle deck space is frequently sold out; whenever possible, sailings are delayed (as opposed to cancelled) in order to maintain customer bookings
- Prior to the introduction of the new website on September 22, 2020, numerous customers expressed their dissatisfaction with the process for making northern route reservations, which at the time could not be completed through an online self-serve portal; the new website allows customers to make bookings and book onboard amenities
- Complaints about the online booking system declined as customers became more familiar with the new functionality

18%
of all
complaints

BC Ferries Website (n=35)

New Website Issues (n=20)

(New schedule format is hard to understand, website is difficult to navigate/find information)

Service Notices (n=4)

(Ensure information is timely, complete and accurate)

Email Communications (n=3)

(Long delays for system emails, unsolicited or duplicate emails)

- A redesigned schedule format was implemented online on April 17, 2020; we are monitoring feedback to ensure it addresses concerns
- Service Notices and Travel Advisories are updated as soon as new information becomes available. In some cases, customers travel relatively long distances to the terminals and have already begun their travels before delays and cancellations occur. During service interruptions, customers with reservations are contacted directly by phone and email as soon as possible.
- Customers reporting delayed, unsolicited or duplicate emails were contacted for more information, which was shared appropriately for investigation; a technical fix for these issues is currently in development, and is expected to be in place by July 2021

16%
of all
complaints

Customer Service (n=31)

Phone Service Complaints (n=13)

(Wait times to speak to agent)

Phone Service Complaints (n=6)

(Unhelpful or unpleasant staff, misinformation, booking error made)

Terminal Staff Complaints (n=5)

(Unpleasant/confrontational interaction, unhelpful staff)

- Call wait times in peak season were addressed through the addition of seasonal staff
- Customers travelling on these routes expressed similar concerns as raised on our other routes regarding staff interactions; our response to these issues was consistent. Operations management is providing ongoing training of front-line staff to empower them to assist customers at first contact.
- Employee conduct concerns were shared as appropriate for internal review and follow-up

YOY CHANGE: Complaints are UP

Fiscal 2020 Comparison: 4%

YOY CHANGE: No change

Fiscal 2020 Comparison: 16%

Customer Engagement Activities

Fiscal 2021

FERRY ADVISORY COMMITTEES

BC Ferries has 13 Ferry Advisory Committees (FACs) that provide input and guidance to BC Ferries decision-making, and act as liaisons between BC Ferries and the communities they represent. FACs have been established for the geographic areas listed here.

BC Ferries generally holds at least two formal public meetings a year with the FACs to discuss local terminal and service issues. Additional meetings may take place on an as-needed basis to address operational concerns, and to gather input on specific projects (e.g., terminal development plans). Due to COVID-19 restrictions, all meetings in Fiscal 2021 were conducted virtually.

Brentwood Bay/Mill Bay

Bowen Island

Campbell River/Quadra Island/Cortes Island

Chemainus/Thetis Island/Penelakut Island

Denman/Hornby

Gabriola Island

Langdale/Gambier/Keats

North and Central Coast

Northern Sunshine Coast

Salt Spring Island

Southern Gulf Islands

Southern Sunshine Coast

Tri-Islands (Port McNeill/Sointula/Alert Bay)

FAC ACTIVITIES

In Fiscal 2021, Ferry Advisory Committees were engaged in the following activities:

Discussions around COVID-19-related effects on service, including service reductions, essential and priority travel needs, and the safe return of service as public health restrictions changed throughout the year.

Project-related engagement efforts for:

- Moving Ahead Together on the Sunshine Coast
- Southern Gulf Islands Schedule Enhancement
- Island Class scheduling for Routes 19 and 23
- Snug Cove, Westview, Earls Cove and Sturdies Bay Terminal Development Plans

A total of 20 virtual meetings were held with FACs in Fiscal 2021.

THEMES

In Fiscal 2021, discussions with Ferry Advisory Committee members included the following key themes:

Understanding ongoing issues around COVID-19-related travel, such as priority travel needs, meeting the needs of communities when reduced service levels were required, reintroducing service safely and matching service with demand as travel restrictions eased.

Resolving route-specific problems and community experiences shared by FAC members.

Understanding changes to capital planning as a result of COVID-19.

Project-related input as described in the *Project-Based Engagement Initiatives* section (see following page).

PROJECT-BASED ENGAGEMENT INITIATIVES

We believe that engagement with staff, stakeholders, customers, community members and First Nations results in better decisions, and that this engagement can create solutions to challenges we may not have otherwise considered. We are committed to:

Involving our customers, the Indigenous and coastal communities we serve, and our employees in the decisions that impact them whenever possible.

Listening carefully to what we hear, and considering all feedback alongside safety, financial, operational, environmental and other requirements as we make our decisions.

Responding to what we hear by being open to adapting our engagement efforts as we go, and by showing how engagement input has influenced our decision-making process.



The graphic is a white rectangular document titled "Our Engagement Commitment". It features three circular photographs of people in various settings: two adults at a table, a group of people outdoors, and a person holding a child. Below the title, a section titled "Through our engagement efforts we are committed to:" lists three main areas: INVOLVING, LISTENING, and RESPONDING. Each area includes a bulleted list of specific actions. At the bottom right is the BC Ferries logo.

Our Engagement Commitment

We believe involving our customers, the Indigenous and coastal communities we serve, and our employees in the decisions that impact them most, results in better decisions and can create solutions to challenges we may not have otherwise considered.

Through our engagement efforts we are committed to:

INVOLVING

- Organizing or participating in gatherings to continue to engage unique interests in engagement and decision-making processes.
- Providing the Indigenous people we serve with opportunities to participate meaningfully in the decision-making process (e.g., governance, safety, community requirements, requirements and changes), as well as the interests and needs of First Nations.

LISTENING

- Listening carefully to what we hear and considering all feedback (including safety, financial, operational, environmental, and other requirements) as we make our decisions.
- Meeting opportunities for the customer, community members, Indigenous, and coastal communities, employees or partners with whom they regularly work (e.g., clients, car owners, passengers, etc.) to understand their needs and interests.
- Considering the need for ongoing engagement throughout our engagement activities.
- Meeting community, the Indigenous and coastal communities we serve, and our employees' needs as they arise appropriately.

RESPONDING

- Responding by being open to adapting our engagement efforts as we go, and by showing how engagement input has influenced our decision-making process.
- Adapting our approach to be respectful and inclusive of all voices in a community and ensuring that it aligns our approach around our service users.
- Considering the need for ongoing engagement throughout our decision-making process.
- Seeking out feedback of best engagement practices from Indigenous people (its users), and learning about improving engagement practices and offerings.

BC Ferries

COMMUNITY ENGAGEMENT

Our project-based community engagement initiatives in Fiscal 2021 included:

Major Engagement Projects

- Moving Ahead Together on the Sunshine Coast
- Phase I of the Southern Gulf Islands Schedule Enhancement project
- A scheduling exercise for two-ship service on Route 23 (Campbell River–Quadra Island) and Route 19 (Nanaimo Harbour–Gabriola Island)

Minor Terminal Development Plan Engagements

- Snug Cove, Westview, Earls Cove and Sturdies Bay Terminal Development Plans

Customer Engagement Activities

Fiscal 2021

Summary of Major Engagement Projects in Fiscal 2021

Title of project	Moving Ahead Together on the Sunshine Coast	Island Class Scheduling (Routes 19 & 23)	Southern Gulf Island Schedule Enhancement – Phase I
Purpose of engagement	Gather input on near-term solutions to improve ferry service on the Sunshine Coast	Support the evaluation of new schedules for two-ship service on these routes	Support the development of an enhanced schedule for the Southern Gulf Islands
Engagement activities	Online engagement Pop-up events onboard and at terminals Paper copies of engagement in community spaces Two virtual community meetings Five meetings of 19-member Project Working Group One meeting of the Project Sounding Board	Four FAC meetings Online engagement Two virtual community meetings Five meetings of 19-member Project Working Group One meeting of the Project Sounding Board	Four FAC meetings Online engagement 22 key stakeholder interviews
Key themes	Improving travel certainty Enhancing comfort of medical travel Enhancing communications with customers to help plan travel ahead of time and on day of travel Managing demand through pricing and communications	Route 19: Morning and evening sailing times and capacity to support demand, e.g., school sailings Route 23: Providing service directly on the hour and half hour; connections/impacts on Cortes Island	Priority criteria: frequency, preferred sailing times and capacity Most significant community changes over past five years: growth in tourism and growth in full- and part-time residents Priority use of additional capacity: increased access to Tsawwassen and Swartz Bay
Next steps	Additional stakeholder and community engagement as required	BC Ferries to review and refine schedules and release final schedules to community	BC Ferries to develop schedule concepts Phase II engagement: work with FAC and the community to evaluate concepts

Customer Engagement Activities

Fiscal 2021

Summary of Minor Terminal Development Plan Engagements in Fiscal 2021

Title of project	Snug Cove Terminal Development Plan	Westview Terminal Development Plan	Earls Cove Terminal Development Plan	Sturdies Bay Terminal Development Plan
Purpose of engagement	Work with the community to develop, review and refine terminal design concepts	Work with the community to develop, review and refine terminal design concepts	Work with the community to develop, review and refine terminal design concepts	Work with the community to develop, review and refine terminal design concepts
Engagement activities	Online engagement Virtual meetings with Bowen Island Municipality Meetings with FAC	Online engagement Virtual meetings with stakeholders Meetings with FAC	Online engagement Virtual meetings with Sunshine Coast Regional District Advisory Planning Commission Meetings with FAC	Online engagement Virtual meetings with stakeholders Pop-up events at Earls Cove terminal Meeting with Lelum Sar Augh Ta Naogh First Nation Virtual meeting with Shíshálh First Nation
Key themes	New waiting room/ washroom building Expanded covered areas for people and bikes/scooters Improving safety, traffic in/out of terminal Safety enhancements with reversible lane markings/signage	Enhancing the waiting room/washroom building Improving traffic flow through the terminal Increasing vehicle holding capacity Enhancing pedestrian safety at the terminal	Enhancing the waiting room/washroom building Improving traffic flow through the terminal Increasing vehicle holding capacity Enhancing pedestrian safety at the terminal	Providing a wider walkway on the trestle Enhancing pedestrian space and safety Holding area expansion Addition of transfer traffic thru lane near terminal Maintain existing parking spaces, or add parking
Next steps	BC Ferries to complete Terminal Development Plans and present them to the community	BC Ferries to complete Terminal Development Plans and present them to the community	BC Ferries to complete Terminal Development Plans and present them to the community	BC Ferries to complete Terminal Development Plans and present them to the community

INDIGENOUS RELATIONS AND ENGAGEMENT

The primary objective of early and ongoing engagement with First Nations with interests in the lands and waters on all major projects is to seek, identify and understand any potential adverse impacts that proposed activities may cause to their interests and to find ways to avoid or minimize these adverse impacts.



In Fiscal 2021, Indigenous relations and engagement activities included:

TERMINAL DEVELOPMENT PROJECTS

Swartz Bay Berth 5 Project

To support the proposed upgrades to accommodate the new Salish vessel, we consulted with First Nation and Crown governments to work towards addressing specific concerns and regulatory requirements. **These discussions are ongoing.**

Quathiaski Cove

To support terminal development planning for Route 23, the project team shared information with interested First Nations in relation to project-specific activities. The project team met with the Chief and Council of We Wai Kai First Nation to introduce the project team, to provide an overview of the project and current status, to discuss potential concerns and interests, and to support relationship building.

Nanaimo Harbour and Gabriola

To support terminal development planning for Route 19, the project team connected with the Snuneymuxw First Nation to discuss the proposed project and to understand any concerns the Nation may have in relation to project-related activities. **These discussions are ongoing.**

Langdale

The project team met with the Squamish, Musqueam, Shíshálh and Tsleil-Waututh Nations to advise that terminal development at this location is being postponed, and to provide the final archeological reports to the Nations as required.

Westview

To support terminal development planning, the project team met with the Tla'amin Nation to share conceptual planning at this location, to understand if the Nation may have any concerns with the upgrades being proposed and to share ideas for integrating cultural elements at the terminal.

Earls Cove

To support terminal development planning, the project team met with the Shíshálh Nation to share conceptual planning at this location, to understand if the Nation may have any concerns with the upgrades being proposed and to share ideas for integrating cultural elements at the terminal.

Sturdies Bay

To support terminal development planning, the project team met with Lelum Sar Augh Ta Naogh to share conceptual planning at this location, to understand if the First Nations aggregate group may have any concerns with the upgrades being proposed, and to share ideas for integrating cultural elements at the terminal.

ISLAND CLASS ELECTRIFICATION PROGRAM

BC Ferries engaged First Nations to inform them of the proposal to convert the Island Class vessels to fully electric operations. Through these discussions, BC Ferries received several letters of support for the proposal.

MEMORANDUM OF UNDERSTANDING

BC Ferries entered into a Memorandum of Understanding with the Ministry of Transportation and Infrastructure and the **BC Transportation Financing Authority** to establish a framework for the parties to work together to ensure the Crown's duty to consult First Nations is fulfilled on a timely and efficient basis with contributions from BC Ferries if and where appropriate to the consultation process at hand.

INTERNAL TRAINING

Indigenous Relations and Engagement Best Practices training was provided as part of the **annual BC Ferries' Project Manager's Conference**.

Customer Engagement Activities

Fiscal 2021

OUTREACH AND RELATIONSHIP BUILDING

Haida Nation travel advisories

As a result of COVID-19 and the current state of emergency at Haida Gwaii, ongoing support was provided to the Haida Nation by integrating travel advisories at the time of booking, providing onboard announcements for passengers on Route 11 and affixing posters developed by the Haida Nation at terminals.

Tsleil-Waututh Nation

Met with the Tsleil-Waututh Nation to begin the development of a relationship and to discuss potential future areas of partnerships.

We Wai Kai and Wei Wai Kum First Nations

Continued discussions with the We Wai Kai and Wei Wai Kum Nations to better understand how BC Ferries can support their community and to initiate a working group to explore opportunities to integrate cultural acknowledgement and artwork within their territories at the Campbell River and Quathiaski Cove terminal locations. The Nations were invited to nominate members to act as sponsors for two of the Island Class vessels and participate in a workshop to identify names for the vessels destined for service within their territory on Route 23.

Snuneymuxw First Nation

The Nation was invited to nominate a member to act as a sponsor for one of the Island Class vessels and to participate in a workshop to identify names for the vessels destined for service within their territory on Route 19.

Klahoose First Nation

Meetings were held with Klahoose First Nation to continue to strengthen our relationship and to look at opportunities for BC Ferries to support their members and broader island communities. Medical Assured Loading was provided to the Nation to help ensure that their medical support aide would be able to avoid summer tourism delays and arrive at their community on time for appointments.

Nuxalk First Nation

As a result of COVID-19 and a state of emergency within their territory, support was provided to the Nuxalk Nation by integrating travel advisories at the time of booking, providing onboard announcements for passengers on routes within the Bella Bella/Bella Coola region and affixing posters at key terminals developed by the Nation.

Malahat First Nation

As a result of COVID-19 and a state of emergency within their territory at Mill Bay, BC Ferries worked with the Malahat Nation to incorporate new signage and fencing along the edge of their reserve **to encourage ferry travel travellers to avoid entering the Nation's residential area.**

Tribal Journey 2020 & 2021

BC Ferries took part as a coordinating committee member to support the Paddle to Snuneymuxw and Tla'amin Territory, in collaboration with the Province, including local law enforcement, the Port of Nanaimo and other stakeholders.

Key account established for Indigenous Services Canada

A Key Account was established with Indigenous Services Canada to help First Nations children obtain support they need to attend health, education or social appointments. Many of these children and their families come from remote First Nations communities that rely on BC Ferries as a means of transport to access important services. This account, **through the Jordan's Principle program, helps to reduce this barrier through direct billing arrangements with BC Ferries.**

DIRECTORY

Definitions of Terms

Fiscal 2021

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 – ALERT BAY – SOINTULA

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

MID AND NORTH COAST

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

Controllable Cancellations: Sailings cancelled due to controllable events such as loading procedure or fueling.

First Call Resolution (FCR): The rate at which customers call back within the same day.

Fleet Reliability Index: Percentage of scheduled sailings that are not cancelled due to controllable events.

n: Symbol that represents either sample size (e.g., number of surveys collected) or count (e.g., number of complaints with a comment or rating). The number of complaints used for further analysis excludes general comments and comments without a rating.

Net Promoter Score (NPS): A widely used customer satisfaction measure that considers the percentage difference between “promoters” and “detractors” within a company’s customer base. The NPS is a trademarked measure.

On-Time Performance: Percentage of scheduled sailings that depart or arrive within 10 minutes of the scheduled time, as applicable.

Stale Response Resolution: Percentage of passenger comments within the ResponseTek system that did not receive a response from the Customer Relations team within 7 days of the comment having been submitted in Quarters 3 and 4, and within 14 days of the comment having been submitted in Quarters 1 and 2.

Uncontrollable Cancellations: Scheduled sailings cancelled due to uncontrollable events such as inclement weather or medical emergencies.

Customer Satisfaction Tracking Report

2020



Customer Satisfaction Tracking

2020 – All Waves





This report was prepared by R.A. Malatest & Associates Ltd. for
BC Ferries' *Customer Satisfaction Tracking Research*.

BACKGROUND AND INTRODUCTION

Since 2003, BC Ferries has been conducting Customer Satisfaction Tracking (CST) research on select routes, in accordance with the Coastal Ferry Services Contract between BC Ferries and the Province of British Columbia. In 2019, BC Ferries in conjunction with R.A. Malatest & Associates Ltd. (Malatest), an independent research firm, developed and implemented a new, more comprehensive CST data collection methodology.

As a core data gathering strategy, Malatest conducts intercept surveys on BC Ferries vessels in June, August and November each year. However, as a result of the COVID-19 pandemic, passenger surveying was cancelled for the June 2020 (Wave 1) period.

This report presents findings from 2020 (Waves 2 and 3 data collection periods only). Included in this report are the first YOY comparisons using the new collection and reporting methodology, which was implemented in 2019. Passengers who were surveyed reported an overall satisfaction score of 3.97 (-0.12 compared to 2019), and 81% of passengers surveyed reported that they were satisfied with their overall experience (-4% compared to 2019).

Impact of the COVID-19 pandemic on CST Research: In response to the COVID-19 pandemic, BC Ferries introduced new measures at terminals and onboard to ensure public safety; including limiting services and amenities. It is reasonable to assume that these service and amenity limitations imparted a deleterious effect on the 2020 CST scores. Further, annual scores are likely to have been negatively impacted by the lack of international tourists (due to government travel restrictions) and the cancelling of the June intercept period.¹

¹ Historically, CST scores have tended to be higher for tourists when compared to local residents and June CST scores are often higher when compared to the average of August/November scores.

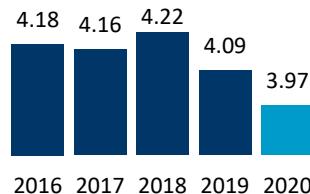
EXECUTIVE SUMMARY

Customer Satisfaction Survey Highlights

All Waves 2020

Overall Satisfaction

Overall satisfaction scores decreased this year compared to 2019. The decrease may be in part due to the impact of the COVID-19 pandemic on BC Ferries' operations.

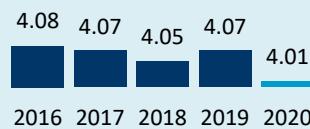


3.97

-0.12
FROM
2019

Terminal Satisfaction

Terminal satisfaction scores decreased this year compared to August 2019. The decrease may be in part due to the impact of the COVID-19 pandemic on BC Ferries' terminal operations.

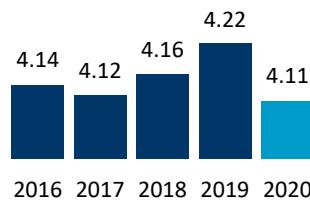


4.01

-0.06
FROM
2019

Onboard Satisfaction

Onboard satisfaction scores decreased this year compared to 2019. The decrease may be in part due to the impact of the COVID-19 pandemic on BC Ferries' onboard operations.



4.11

-0.11
FROM
2019

Ferry Running On Time

Passenger assessments of whether the ferry was running on time were lower this year compared to last.

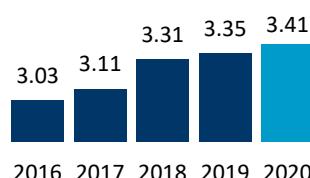


3.84

-0.09
FROM
2019

Value for Money of Fares

Value for Money of Fares scores continue to steadily increase year-over-year. The 2020 score is the highest score achieved in the past 5 years.



3.41

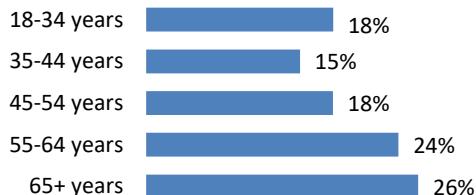
+0.06
FROM
2019

EXECUTIVE SUMMARY

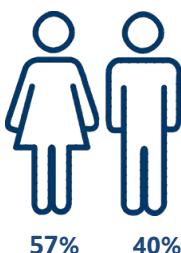
Passenger Characteristics*

All Waves 2020

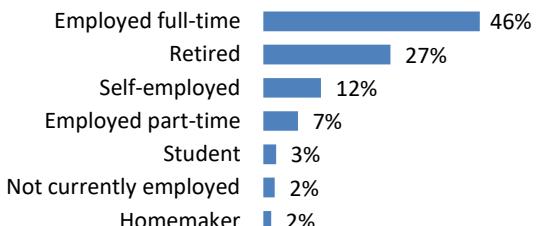
Passenger Age**



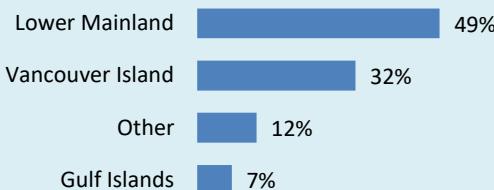
Gender



Occupational Status**



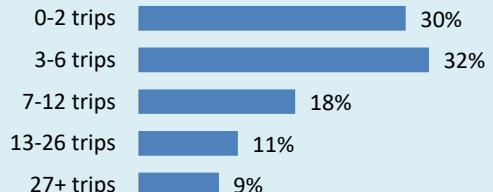
Residence



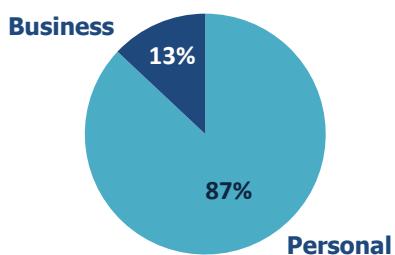
Average party size:

2.1

Return Trips (per year)



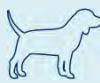
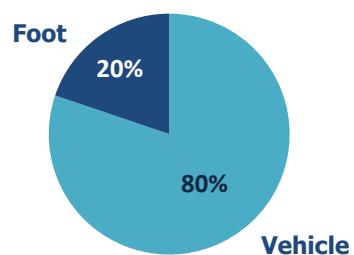
Reason for Travel



Average stated passenger expenditure (per capita):

\$16.44

Passenger Type



Passengers travelling with a pet:

13.7%



Passengers travelling with children:

15.9%



Foot passengers travelling with a bicycle:

11.2%



Passengers travelling for commercial purposes:

1.8%

PASSENGER AND TRIP OVERVIEW

This page showcases the demographics of the **5,199** passengers who completed a CST intercept survey in August or November, on routes 1, 2, 3, 30, 4, 5/9 or 19.

*Data is based on survey responses and **may not be representative of all BC Ferries' passengers**.

**Total does not equal 100% due to rounding.

EXECUTIVE SUMMARY

All Waves 2020

Customer Satisfaction Survey Highlights

KEY DRIVERS OF CUSTOMER SATISFACTION

- The key driver analysis focuses on identifying service areas that have a high correlation with customer satisfaction (correlation score >.40). Service areas that have high correlation scores and CST scores greater than 4.0 (out of a possible 5) are **success areas**. Service areas that have high correlation scores and CST scores lower than 4.0 (out of a possible 5) are **areas of opportunity** (improvements in these areas could have a tangible impact on customer satisfaction).
- This page summarizes the findings for three separate analyses: key drivers of overall satisfaction (p.6), key drivers of terminal services (p.9) and key drivers of onboard services (p. 12).

OVERALL CUSTOMER SATISFACTION	Success Areas <i>Correlation Score (High), CST Score (High)</i>	Areas of Opportunity <i>Correlation Score (High), CST Score (Low)</i>
	Atmosphere on the ferry overall	Ability to get onto desired sailing
	Procedures for loading	BC Ferries staff went the extra mile
	Ease of access, overall (all passengers)	Wait time at the terminal
	Lounge seating (onboard)	Pre-boarding lounge
	Safety of ferry operations	Ferry running on time

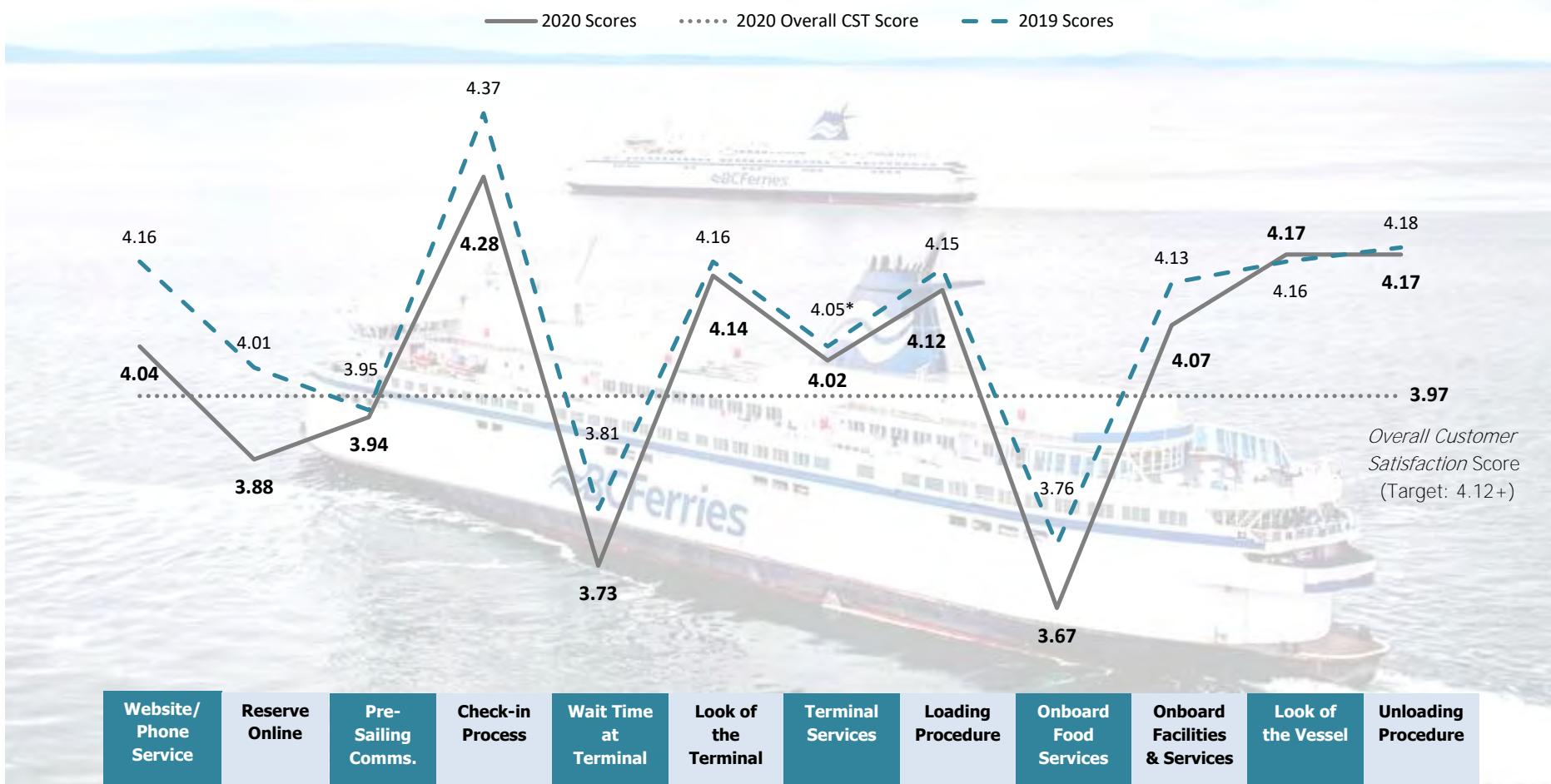
TERMINAL SERVICES SATISFACTION	Success Areas <i>Correlation Score (High), CST Score (High)</i>	Areas of Opportunity <i>Correlation Score (High), CST Score (Low)</i>
	Efficiency of the check-in process	Pre-boarding lounge
	Procedure for loading	Wait time at the terminal
	Staff customer service (ticket purchase)	Usefulness of digital information screens
	Professionalism of terminal staff	Announcements when you need to be informed
	Clarity of staff directions	Parking options at the terminal

ONBOARD SERVICES SATISFACTION	Success Areas <i>Correlation Score (High), CST Score (High)</i>	Areas of Opportunity <i>Correlation Score (High), CST Score (Low)</i>
	Atmosphere on the ferry overall	Workstations
	Ease of access, overall (all passengers)	Announcements when you need to be informed
	Procedures for unloading	Passages Retail Store
	Professionalism of onboard staff	Quality and variety of food/beverages offered onboard
	Lounge seating (onboard)	Pet area onboard

2020 (All Waves) CST Survey Results

R.A. Malatest & Associates

PASSENGER SATISFACTION THROUGHOUT THE BC FERRIES JOURNEY



The dotted line represents the “Overall Satisfaction Score” for 2020 passengers. Looking at the whole journey, passenger “high points” include the check-in process (4.28), look of the vessel (4.19) and the unloading procedure (4.18). Passenger “low points” include onboard food services (3.67) and the wait time at the terminal (3.73). These highs and lows are similar to what was identified in 2019. The 2020 pattern of results follows that of 2019, however, scores are lower across all categories (with the exception of look of the vessel and unloading procedure which are almost the same).

*The 2019 Terminal Services score was updated due to a change in methodology. Historically, passengers have evaluated the food/beverage services and merchandise services offered nearby (e.g. amenities in the village of Horseshoe Bay). A decision was made in 2020 to only ask this question of passengers departing from Tsawwassen, Swartz Bay, or Departure Bay terminals.

PASSENGER SATISFACTION THROUGHOUT THE BC FERRIES JOURNEY – *Cont.*

The journey map scores presented on the previous page are either customer satisfaction scores for a single survey item or a composite score of two or more survey questions. The following table outlines the item(s) for each score.

Journey Map Category	Customer Satisfaction scores for...
Website/Phone Service	Usefulness of BC Ferries website BC Ferries phone service Ease of using/understanding sailing schedules
Reserve Online	Ease of using online reservations
Pre-Sailing Comms.	Effective communication of service updates
Check-in Process	Efficiency of the check-in process Staff customer service Clarity of staff directions
Wait Time at Terminal	Wait time at the terminal
Look of the Terminal	Outside appearance of the terminal you left from Overall appearance inside the terminal you left from
Terminal Services	Announcements when you needed to be informed Usefulness of digital information screens Quality and variety of merchandise offered at the terminal Quality and variety of food/beverages offered at the terminal Washrooms Professionalism of terminal staff
Loading Procedure	Procedure for loading
Onboard Food Services	Quality and variety of food/beverages offered Value for money (of food services) Staff customer service
Onboard Facilities & Services	Passages Retail Store Washrooms Play area for children* Pet area Workstations Lounge seating The SeaWest Lounge* Ease of access overall Ease of finding facilities/services Announcements when you need to be informed Atmosphere on the ferry overall Professionalism of onboard staff
Look of the Vessel	Outside decks Outside appearance of vessel overall
Unloading Procedure	Procedures for unloading

* Service closed / item excluded in 2020 due to the COVID-19 pandemic.

For categories with a single item, the weighted customer satisfaction score for that item was used. For composite scores, an average of the items was mapped. A composite score is also informed by the number of respondents who answered each of the individual items. For example, the check-in process score of 4.28 is not calculated by taking the average of the aggregate scores listed in Appendix A. Rather, each item contributes a weighted amount that is proportionate to the number of respondents who completed each item.

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Impact of the COVID-19 Pandemic

The 2020 CST intercept survey methodology was modified to ensure that it aligned with the public safety measures that BC Ferries introduced in response to the COVID-19 pandemic. These changes included adjustments to the recruitment method, CST Survey Instrument, and data weighting method.

RECRUITMENT METHOD CHANGES

- **Use of Personal Protective Equipment**

To ensure staff and passenger safety, Malatest staff wore personal protective equipment (PPE), including face coverings and gloves while conducting onboard intercept surveys. Survey tools were sanitized after every use and efforts were made to limit any back-and-forth exchange of materials (e.g., respondents were given pens they could keep after completing the survey). Surveyors maintained a distance of 2 meters from passengers and crew and were instructed to avoid surveying areas of the ship that were crowded.

- **Use of Postcards**

To limit contact between passengers and Malatest survey staff, postcards were placed on the windshields of empty vehicles or quickly handed to passengers (one-way transfer). The postcard (Appendix E) encouraged passengers to complete the online CST Survey which passengers could access using the [ferryfeedback.ca](#) portal.

- **Engaging Reservation Holders**

Given the parameters around PPE and physical distancing, it was expected at the outset that surveyors would likely secure fewer surveys. To ensure that a robust number of surveys were completed during the intercept period, a random sample of passengers who had reserved and sailed on Routes 1, 2, 3, 9, and 30 were emailed an invitation to complete a CST survey online.

SURVEY INSTRUMENT CHANGES

The CST survey instrument was also revised to reflect service changes as a result of the COVID-19 pandemic. These changes included:

- Removal of satisfaction questions pertaining to services that were not being offered by BC Ferries as a result of COVID-19, such as questions about the children's play area and SeaWest Lounge.
- A new question was added to gauge passengers' satisfaction with BC Ferries' response to the COVID-19 pandemic.

COVID-19 Question: *How satisfied or dissatisfied were you, overall, with BC Ferries' response to COVID-19 and the safety measures that have been implemented to help prevent the spread of infectious disease?*

DATA WEIGHTING CHANGES

With the inclusion of more reservation holders in the sample, the weighting schema was adjusted to account for whether a respondent had redeemed a reservation.

Panel Engagement

Similar to surveying efforts in 2019, BC Ferries panel members (n=18,913) were invited to complete the CST survey based on their most recent experience with BC Ferries. Email invitations were sent to one half of the panel membership list in August 2020 (Wave 2) and the other half in November 2020 (Wave 3).

In addition to the intercept routes, panel members were able to report on any BC Ferries route, as long as travel had occurred in the past 7 days. This was increased from 48-hours as it was expected that individuals would be travelling less frequently during the pandemic. A total of 1,751 panel members, who sailed on a combined total of 24 routes, completed the CST survey in 2020 (Table 1).

Table 1: Survey Completions and Overall Satisfaction Scores by BC Ferries Panel Members

ROUTE	# Surveys	Change (2019-20)	2019	2020	Change (2019-20)
INTERCEPT ROUTES					
1 Tsawwassen - Swartz Bay	257	+87	4.19	4.10	-0.09
2 Horseshoe Bay – Departure Bay	206	+72	3.99	3.75	-0.24
3 Horseshoe Bay - Langdale	243	+84	3.79	3.42	-0.37
4 Swartz Bay - Fulford Harbour	103	+41	3.66	4.09	+0.43
5/9 Swartz Bay/Tsawwassen - Southern Gulf Islands	330	+136	3.79	3.95	+0.16
19 Nanaimo Harbour – Descanso Bay	167	+60	3.65	3.66	+0.01
30 Tsawwassen - Duke Point	123	+57	3.89	4.11	+0.22
OTHER ROUTES					
6 Vesuvius - Crofton	59	+22	3.14	3.75	+0.61
7 Earls Cove - Saltery Bay	9	+3	4.17	3.89	-0.28
8 Horseshoe Bay - Snug Cove	52	+7	3.93	4.13	+0.20
10 Bear Cove - Prince Rupert	1	0	-	-	-
11 Prince Rupert - Skidegate	2	-1	-	-	-
12 Brentwood Bay - Mill Bay	25	+13	4.00	4.64	+0.64
13 Langdale - New Brighton - Keats Landing	3	+2	-	3.33	-
17 Westview - Little River	35	+13	3.77	4.03	+0.26
18 Westview - Blubber Bay	34	+9	3.92	3.79	-0.13
20 Chemainus - Preedy Harbour - Penelakut Island	3	+2	-	-	-
21 Denman Island West - Buckley Bay	19	+10	4.00	4.21	+0.21
22 Gravelly Bay - Shingle Spit	7	+5	-	2.86	-
23 Campbell River - Quatiski Cove	61	+11	4.10	4.16	+0.06
24 Heriot Bay - Whaletown	5	0	3.80	-	-
25 Port McNeill - Sointula - Alert Bay	4	+3	-	-	-
28 Bear Cove - Bella Coola	2	+2	-	-	-
28a Bella Bella - Ocean Falls - Bella Coola -	1	+1	-	-	-
TOTAL	1,751	+638	3.87	3.88	+0.01

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

The overall satisfaction score of panel members is lower than that obtained through intercept efforts (3.88 compared to 3.97). This comparison should be made tentatively, however, as the panel scores are unweighted and represent a more diverse mix of routes.

CST Intercept Survey Method

Passengers travelling on select BC Ferries routes during Wave 2 (August 6th to 19th, 2020) and Wave 3 (November 5th to 19th, 2020²) data collection periods, were eligible to complete a 2020 CST Survey.

Passengers who agreed to participate in the survey were able to rate their satisfaction with various aspects of their sailing experience, provide feedback on their perception of BC Ferries as a company, as well as make suggestions for possible improvements.

Surveyors moved throughout the vessel and engaged passengers in various areas of the ship (e.g., upper vehicle decks, lounge areas, outer decks). Surveyors administered a demographic screener survey on an iPad and then offered passengers the option of completing the remainder of the survey online (via a secure email link) or on paper, which was provided along with a postage-paid return envelope.

Surveyors also placed invitation postcards on windshields of empty cars on the upper vehicle decks. On occasion, postcards were also provided to passengers who did not wish to engage with surveyors long enough to complete the demographic screener. To supplement intercept efforts, a sample of reservation holders on Routes 1, 2, 3, 9 and 30 who sailed during the survey period were also emailed an invitation to complete the survey.

As shown in the table below, 17% fewer surveys were completed this year than in 2019. This drop is not unexpected given that data collection in Wave 1 (June) was cancelled due to the pandemic.

Table 2: Survey completions overall and by route (2020 – All Waves)

	All Waves 2019	All Waves 2020*	Change (2019-20)
Major Routes (1, 2, 3, 30)	4,251	3,728	-523 (-12%)
Route 1	1,212	1,273	+61 (5%)
Route 2	1,269	1,109	-160 (-13%)
Route 3	772	613	-159 (-21%)
Route 30	998	733	-265 (-27%)
Minor Routes (4, 5/9, 19)	2,038	1,471	-567 (-28%)
Route 4	480	469	-11 (-2%)
Routes 5/9	994	768	-226 (-23%)
Route 19	564	234	-330 (-59%)
Total	6,289	5,199	-1,090 (-17%)

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

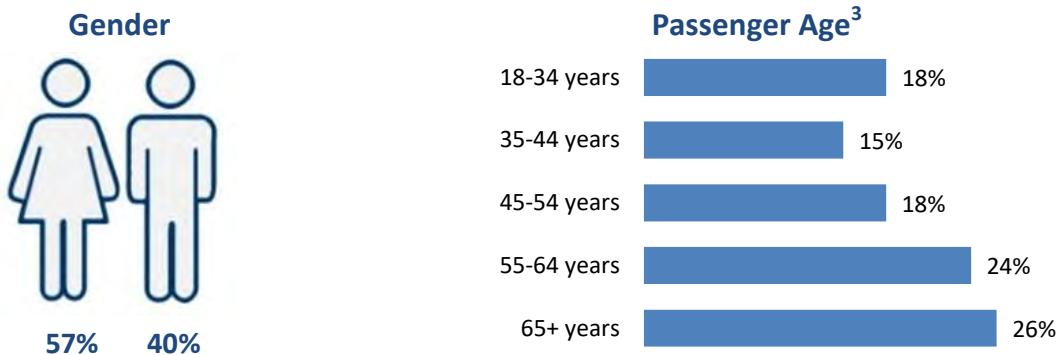
Sometimes, the surveying process ends up over or under-sampling certain types of passengers. To correct for any imbalances, the results in this report have been weighted according to:

- Route
- Day type (weekend vs. weekday)
- Day part (morning, afternoon and evening)
- Passenger type (walk-on vs. vehicle), and
- Reservation status (reservation holders vs. non-reservation holders).

² On November 7th, the Province of British Columbia ordered a stop to all non-essential travel to Vancouver Coastal Health Authority, thus impacting surveying efforts on routes with a Lower Mainland departure or arrival terminal. Intercept surveying continued on Routes 4 and 19 until November 19th.

Passenger and Trip Characteristics

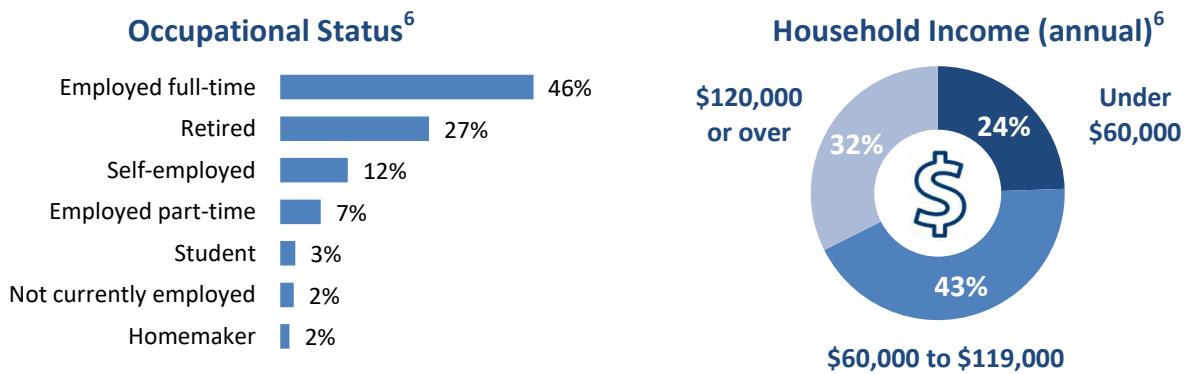
This section summarizes the demographic and other passenger and trip characteristics of those individuals who completed a CST intercept survey during the June, August and November 2020 data collection periods. As such, the data in this report may not be representative of all BC Ferries' passengers.



Of the passengers who completed a CST survey, over one-half were female⁴ and one-half were 55+ years of age.⁵ Because survey distribution was limited to those passengers who were 18 years and older, the age composition above should not be used as a proxy of the age distribution of all BC Ferries passengers.

The majority of passengers reported that they work, either full-time, part-time or are self-employed (65%). An additional 27% are retired. Routes with the highest percentage of retired passengers (in descending order) are: Route 19 (37%), Routes 5/9 (35%), Route 30 (28%), Route 3 (26%), Route 1 (26%), Route 2 (25%), and Route 4 (23%).

Almost one-quarter of respondents (24%) reported household incomes under \$60,000. Nearly one-third of respondents (32%) reported household incomes of \$120,000 or over. The remaining 43% of respondents reported household incomes between \$60,000 and \$119,000.

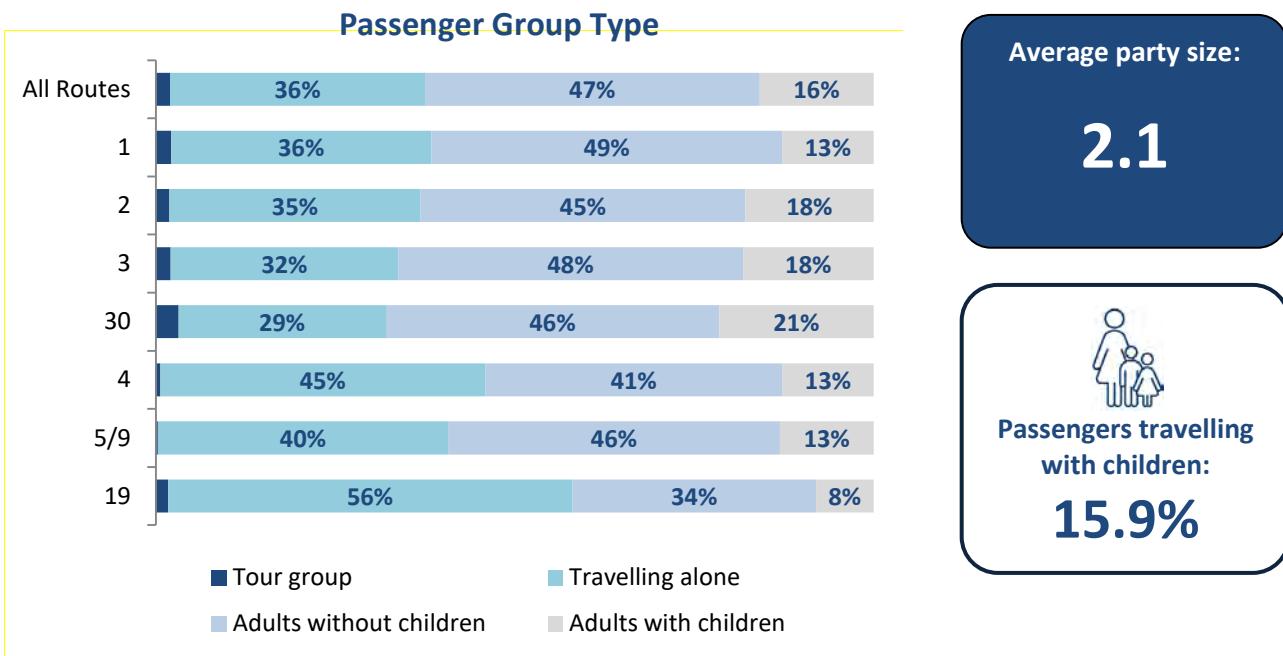


³ Total exceeds 100% due to rounding.

⁴ 3% of passengers reported their gender as "unspecified".

⁵ Passengers reported their year of birth, from which age was approximated.

⁶ Total does not add to 100% due to rounding.



Average party size:

2.1



Passengers travelling with children:

15.9%

The majority of survey respondents reported that they were either travelling alone or with other adults (no children). The proportion of passengers travelling in tour groups was lower this year compared to last (-1% YOY change); likely a result of the COVID-19 pandemic. The average party size was the same as last year (0.0 YOY change).

Almost one-half of survey respondents reported residing in the Lower Mainland (49%), 13% more than last year. Another notable shift is the downturn in USA/International passengers; likely a result of COVID-19 related international travel bans and restrictions.



	All Waves 2019	All Waves 2020	Change (2019-20)
Vancouver Island	36%	32%	-4%
Greater Victoria	20.7%	17.7%	-3%
North of Victoria but south of Nanaimo	3.6%	3.3%	0%
Nanaimo	5.4%	4.7%	-1%
North of Nanaimo	6.6%	6.2%	0%
Gulf Islands	8%	7%	-1%
Lower Mainland	36%	49%	13%
Vancouver	11.0%	15.9%	5%
Lower Mainland	19.2%	28.3%	9%
Sunshine Coast	5.7%	5.0%	-1%
Other	20%	12%	-8%
BC	4.2%	5.4%	1%
Canada (Outside of BC)	7.4%	6.4%	-1%
USA/International	7.9%	0.2%	-8%

Overwhelmingly, passengers who answered the survey were travelling for personal reasons (87%) with “vacationing” and “visiting friends/relatives” the top two reasons for sailing with BC Ferries.

Trip Purpose



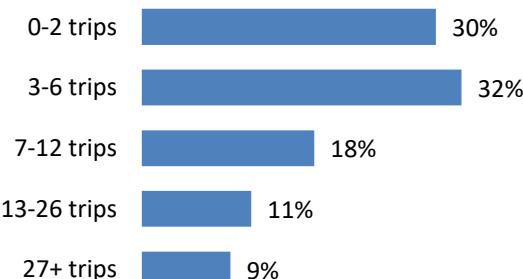
Personal (87%)	
Vacation / getaway / recreation	33.3%
Visiting friends / relatives	32.8%
Required personal travel	16.1%
Shopping	2.9%
Other	1.3%
Attending special event / entertainment	0.7%



Business (13%)	
Business trip or on company business	7.2%
Commuting to / from work	4.1%
Hauling freight or operating a commercial vehicle	1.2%
Attending school, college or course	0.5%

Of those passengers who answered the survey, approximately two-thirds make no more than 6 return trips per year (62%). Of the remaining one-third, the surveying process ended up with a fairly equal distribution of passengers who travel as much as once a month (18%), and passengers who travel at least bimonthly (20%).

Return Trips (per year)



Amount spent ⁷	
Terminal	\$6.36
Onboard	\$10.08
Total	\$16.44

The average amount of stated spend, excluding fares, was \$16.44, with more being spent onboard (\$10.08) than in the terminal (\$6.36). Passengers on Route 30 spent the most (\$22.48 on average), and vehicle passengers spent more than foot passengers (\$17.62 and \$11.70 respectively). Passengers residing in the Lower Mainland spent the most on average (\$17.28 compared to residents of “BC- Other” (\$16.72), Vancouver Island (\$16.26), and the Gulf Islands (\$6.41). Canadians residing outside of BC spent on average \$21.65.

Due to insufficient sample sizes, spend information for International/ USA passengers are not available.

⁷ Average stated passenger expenditure (per capita), excluding ferry fares.



Vehicle Passengers (80.2%)

TYPE OF VEHICLE	
Standard Vehicle	90.4%
Oversize Vehicle	4.3%
Motorcycle	2.1%
Van/Recreational Vehicle	1.6%
Commercial Vehicle	1.3%
Semi Trailer	0.3%
Bus	0%



Foot Passengers (19.8%)

	To Terminal	From Terminal
Dropped off/Picked up	33.7%	42.0%
Drove private vehicle to/from parking lot	30.2%	18.6%
Public transit	17.4%	19.1%
Bicycle	7.6%	8.9%
Taxi	4.3%	3.4%
Other	2.1%	2.4%
Car share	2.1%	0.6%
Walked	1.4%	3.9%
Non-chartered bus	0.9%	0.9%
Charter bus/School bus	0.2%	0.1%
Hitchhiked	0.1%	0.2%

The majority of passengers (80%) who completed the survey travelled by vehicle, of which, nearly all drove a vehicle of standard size (90%). The top three modes of transportation to the terminal for foot passengers were: getting dropped off (34%), driving a private vehicle and parking (30%), and public transit (17%). The top three modes of transportation from the terminal for foot passengers were: getting picked up (42%), public transit (19%), and driving a private vehicle that was parked (19%).



Foot passengers travelling with a bicycle:

11.2%

11.2% of survey respondents who were foot passengers indicated that they were travelling with a bicycle. This is a substantial shift from last year which saw 4.5% of foot passengers report the same.



13.7%

Of survey participants indicated that they were travelling with a pet



1.8%

Of survey participants indicated that they were travelling for commercial purposes

Overall Customer Satisfaction

Customers were also asked to rate their overall satisfaction with their recent experience travelling with BC Ferries.

Table 3. Overall Customer Satisfaction

	2016	2017	2018	2019	2020	Change (2019-20)
Major Routes (1, 2, 3, 30)	-	-	-	4.11	3.96	-0.15
Route 1	4.29	4.26	4.32	4.16	4.07	-0.09
Route 2	4.16	4.21	4.13	4.08	3.94	-0.14
Route 3	3.96	3.92	4.18	4.02	3.70	-0.32 
Route 30	4.19	4.14	4.21	4.12	4.08	-0.04
Minor Routes (4, 5/9, 19)	4.20	4.12	4.22	3.99	4.03	+0.04
Route 4	4.20	4.24	4.28	4.08	4.18	+0.10
Routes 5/9	4.24	4.14	4.24	3.97	4.09	+0.12 
Route 19	4.14	3.99	4.03	3.99	3.76	-0.23
Total	4.18	4.16	4.22	4.09	3.97	-0.12

QUESTION: How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?

(1 = very dissatisfied; 5 = very satisfied). Satisfied passengers are those who reported a 4 or 5 on the question.

Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

Note: Weighted averages (passenger count) reported.

Note: 2018 Minor Routes aggregate also includes responses from routes 8, 12, 17, 18, and 23.

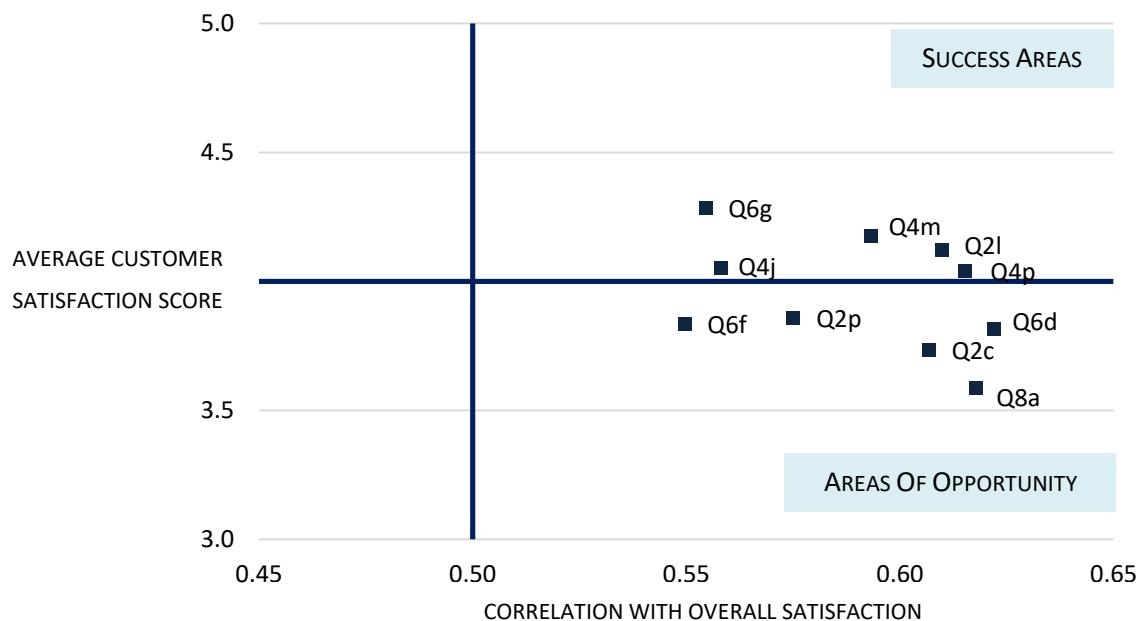
Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Overall customer satisfaction scores have dropped when compared to last year's score (change of -0.12 points). Analysis by route shows the passengers on Route 4 are the most satisfied with their overall experience (4.18) while passengers travelling on Route 3 are the least satisfied (3.70). Route 3 also showed the most marked reduction in overall customer satisfaction score since last year (-0.32).

81% of passengers stated that they were satisfied with their overall experience.

KEY DRIVERS OF OVERALL CUSTOMER SATISFACTION

Correlation scores between all CST questions and overall satisfaction were calculated to determine the strongest key drivers. The top 5 **success areas** (items with high correlation scores and CST scores ≥ 4.0) and the top 5 **areas of opportunity** (items with high correlation scores and CST Scores <4.0) are graphed below.



SUCCESS AREAS (TOP 5)	AREAS OF OPPORTUNITY (TOP 5)
Atmosphere on the ferry overall (Q4p)	Ability to get onto desired sailing (Q6d)
Procedure for loading (Q2l)	BC Ferries staff went the extra mile (Q8a)
Ease of access, overall (Q4m)	Wait time at the terminal (Q2c)
Lounge seating (Q4j)	Pre-boarding lounge at terminal (Q2p)
Safety of ferry operations (Q6g)	Ferry running on time (Q6f)

KEY DRIVERS OF OVERALL CUSTOMER SATISFACTION BY ROUTE TYPE

The key drivers for overall customer satisfaction were also considered separately for major routes and minor routes. The top five **areas of opportunity** for each are listed in the table below.

MAJOR ROUTES: AREAS OF OPPORTUNITY	CORR	MINOR ROUTES: AREAS OF OPPORTUNITY	CORR
Ability to get onto desired sailing	r=0.63	Ability to get onto desired sailing	r=0.58
BC Ferries staff went the extra mile	r=0.62	Pre-boarding lounge at terminal	r=0.58
Wait time at the terminal	r=0.62	BC Ferries staff went the extra mile	r=0.57
Pre-boarding lounge at terminal	r=0.58	Workstations	r=0.56
Ferry running on time	r=0.57	Wait time at the terminal	r=0.52

Note: Reported correlations are significant to a minimum of $p \leq .05$.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Terminal Services Customer Satisfaction

The customer satisfaction score for overall experience at the terminal before boarding declined from the previous year (decrease of -0.06).

Table 4. Customer Satisfaction with the Overall Experience at the Terminal before Boarding

	2016	2017	2018	2019	2020	Change (2019-20)
BC Ferries Total	4.08	4.07	4.05	4.07	4.01	-0.06
Tsawwassen	4.14	4.16	4.15	4.13	4.13	0.00
Swartz Bay	4.11	4.14	4.10	4.07	4.10	+0.03
Horseshoe Bay	4.00	3.98	3.94	4.00	3.88	-0.12
Departure Bay	4.17	4.07	4.12	4.09	3.96	-0.13
Langdale	3.91	3.90	3.87	3.95	3.75	-0.20
Duke Point	4.07	3.99	4.15	4.17	4.09	-0.08
Fulford Harbour	3.85	4.03	3.97	4.02	4.13	+0.11 
Nanaimo Harbour	-	-	4.02	4.12	3.81	-0.31 
Gabriola	-	-	3.64	3.71	3.54	-0.17

QUESTION: How satisfied or dissatisfied were you with your overall experience at the terminal before boarding?

(1 = very dissatisfied; 5 = very satisfied). Satisfied passengers are those who reported a 4 or 5 on the question.

Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

Note: Weighted averages (passenger count) reported.

Note: Historical data unavailable, as denoted by the (-) symbol.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Analysis by individual terminal shows that with the exception of passengers sailing from Swartz Bay and Fulford Harbour, passengers are less satisfied this year with their overall terminal experience compared to 2019. Nanaimo Harbour terminal passengers showed the greatest negative change compared to last year (-0.31). Passengers sailing from Fulford Harbour reported the highest levels of satisfaction (4.13) with their terminal experience while those departing from Gabriola appear to be the least satisfied (3.54).

Overall, 82% of passengers stated that they were satisfied with their terminal experience.

For specific aspects of service within terminals, overall, passenger satisfaction has decreased across the majority of measures, compared to 2019. “Quality and variety of food/beverages offered at the terminal” showed the biggest drop in score when compared to the 2019 average (-0.14) while “Parking options at the terminal” showed the largest increase (+0.27) (Table 5). Satisfaction scores for each terminal are presented in Appendix B.

Table 5. Overall Satisfaction Scores for Individual Terminal Services

TERMINAL SERVICES	2019	2020	Change (2019-20)
Outside appearance of the terminal you left from	4.17	4.15	-0.02
Overall appearance inside the terminal you left from	4.17	4.12	-0.05
Wait time at terminal	3.81	3.73	-0.08
Efficiency of the check-in process	4.32	4.22	-0.10
Staff customer service	4.41	4.31	-0.10
Clarity of staff directions	4.39	4.30	-0.09
Announcements when you needed to be informed	4.08	3.96	-0.12
Usefulness of digital information screens	3.92	3.88	-0.04
Quality and variety of merchandise offered at the terminal	3.77	3.67	-0.10
Quality and variety of food/beverages offered at the terminal	3.66	3.52	-0.14 
Washrooms	4.01	4.01	0.00
Procedure for loading	4.15	4.12	-0.03
Professionalism of terminal staff	4.36	4.28	-0.08
Parking options at the terminal	3.43	3.70	+0.27 
Ease of using passenger pickup/drop-off area	3.95	4.10	+0.15
Pre-boarding passenger lounge at terminal	3.79	3.86	+0.07

Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

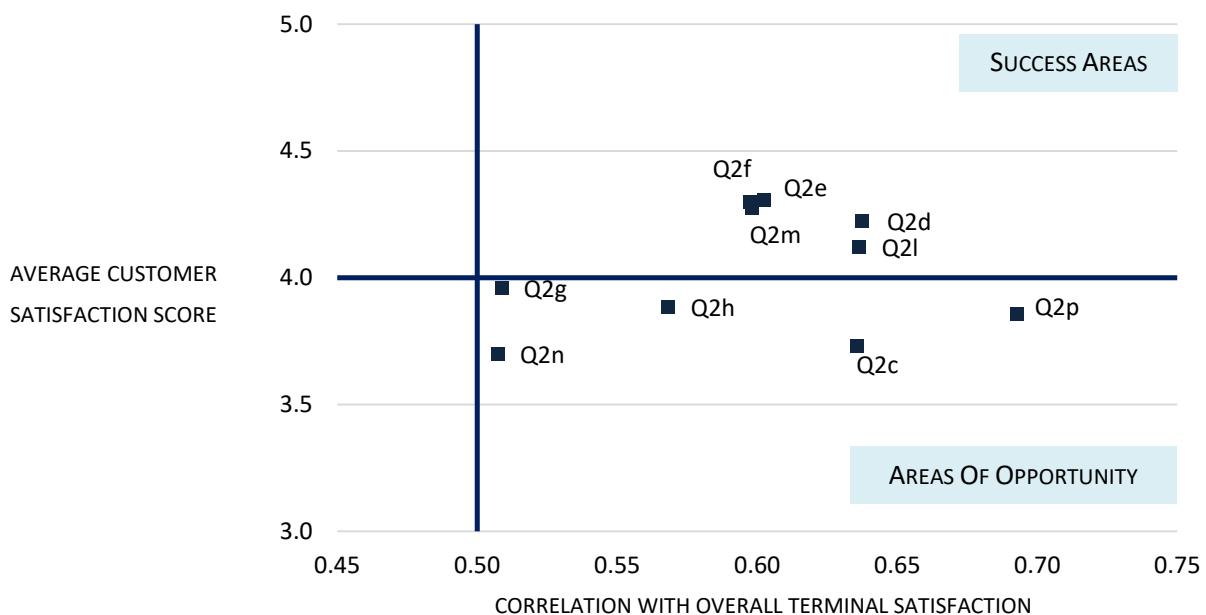
Note: Weighted averages (passenger count) reported.

Note: 2019 scores for “Quality and variety of merchandise offered” and “Quality and variety of food/beverages offered” were updated to reflect a change in methodology (see Appendix B).

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

KEY DRIVERS OF CUSTOMER SATISFACTION AT TERMINALS

Correlation scores between CST questions about terminal services and overall terminal satisfaction were calculated to determine the strongest key drivers. The top 5 **success areas** (items with high correlation scores and CST scores ≥ 4.0) and the top 5 **areas of opportunity** (items with high correlation scores and CST Scores <4.0) are graphed below.



SUCCESS AREAS (TOP 5)	AREAS OF OPPORTUNITY (TOP 5)
Efficiency of the check in process (Q2d)	Pre-boarding lounge (Q2p)
Procedure for loading (Q2l)	Wait time at terminal (Q2c)
Staff customer service (Q2e)	Usefulness of digital information screens (Q2h)
Professionalism of terminal staff (Q2m)	Announcements when you need to be informed (Q2g)
Clarity of staff directions (Q2f)	Parking options at the terminal (Q2n)

KEY DRIVERS OF TERMINAL SERVICES SATISFACTION BY TERMINAL TYPE

The key drivers for overall customer satisfaction were also considered separately for major terminals and minor terminals. The top five **areas of opportunity** for each are listed in the table below.

MAJOR TERMINALS: AREAS OF OPPORTUNITY	CORR	MINOR TERMINALS: AREAS OF OPPORTUNITY	CORR
Pre-boarding lounge	r=0.73	Wait time at the terminal	r=0.61
Wait time at the terminal	r=0.64	Pre-boarding lounge	r=0.60
Usefulness of digital information screens	r=0.57	Ease of using passenger pickup/drop-off area	r=0.55
Announcements when you need to be informed	r=0.51	Usefulness of digital information screens	r=0.54
Parking options at the terminal	r=0.50	Outside appearance of the terminal you left from	r=0.54

Note: Reported correlations are significant to a minimum of $p \leq .05$.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Onboard Services Customer Satisfaction

The customer satisfaction score for onboard services has dropped from last year (decrease of -0.11). This year's score is the lowest on record for the 2016-2020 period.

Table 6. Overall Satisfaction with Onboard Services

	2016	2017	2018	2019	2020	Change (2019-20)
Major Routes (1, 2, 3, 30)	4.15	4.13	4.16	4.22	4.10	-0.12
Route 1	4.21	4.19	4.22	4.24	4.17	-0.07
Route 2	4.15	4.12	4.13	4.22	4.03	-0.19 
Route 3	4.01	4.00	4.11	4.16	3.99	-0.17
Route 30	4.17	4.15	4.14	4.25	4.17	-0.08
Minor Routes (4, 5/9, 19)	4.10	4.06	4.12	4.18	4.17	-0.01
Route 4	4.02	4.06	4.14	4.18	4.31	+0.13 
Routes 5/9	4.16	4.06	4.17	4.20	4.20	0.00
Route 19	4.07	4.07	4.01	4.12	3.98	-0.14
Total	4.14	4.12	4.16	4.22	4.11	-0.11

QUESTION: How satisfied or dissatisfied were you with your overall experience onboard the ferry?

(1 = very dissatisfied; 5 = very satisfied). Satisfied passengers are those who reported a 4 or 5 on the question.

Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

Note: Weighted averages (passenger count) reported.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Analysis by route shows that passengers on Route 4 are the most satisfied with their onboard services experience (4.31) while passengers travelling on Routes 3 and 19 are the least satisfied (3.99 and 3.98 respectively). Route 2 showed the most marked decrease in score compared to 2019 (-0.19).

Overall, 86% of passengers stated that they were satisfied with their onboard experience.

Table 7 shows that for the majority of onboard services, passengers are not as satisfied this year when compared to last. The service areas that experienced the largest decreases include “Atmosphere on the ferry overall” (-0.17), “Staff customer service” (-0.16), the “Passages Retail Store” (-0.15) and the “Quality and variety of food/beverages offered” (-0.15). Route specific scores for each of these questions are available in Appendix A.

Table 7. Overall Satisfaction Scores for Individual Onboard Services

ONBOARD SERVICES	2019	2020	Change (2019-20)
Quality and variety of food/beverages offered	3.75	3.60	-0.15
Value for money (food services)	3.23	3.23	0.00
Staff customer service	4.30	4.14	-0.16
Passages Retail Store	4.03	3.88	-0.15
Washrooms	4.05	4.07	+0.02
Play area for children*	3.56	-	-
Pet area	3.16	3.21	+0.05 
Workstations	3.83	3.70	-0.13
Outside decks	4.22	4.18	-0.04
Lounge seating	4.12	4.05	-0.07
The SeaWest Lounge experience*	3.74	-	-
Outside appearance of vessel overall	4.16	4.18	+0.02
Ease of access, overall	4.19	4.17	-0.02
Ease of finding facilities/services	4.19	4.16	-0.03
Announcements when you need to be informed	4.09	3.96	-0.13
Atmosphere on the ferry overall	4.21	4.04	-0.17 
Procedures for unloading	4.18	4.17	-0.01
Professionalism of onboard staff	4.40	4.30	-0.10

*Customer satisfaction scores are not available as the service was not available in 2020 due to the COVID-19 pandemic.

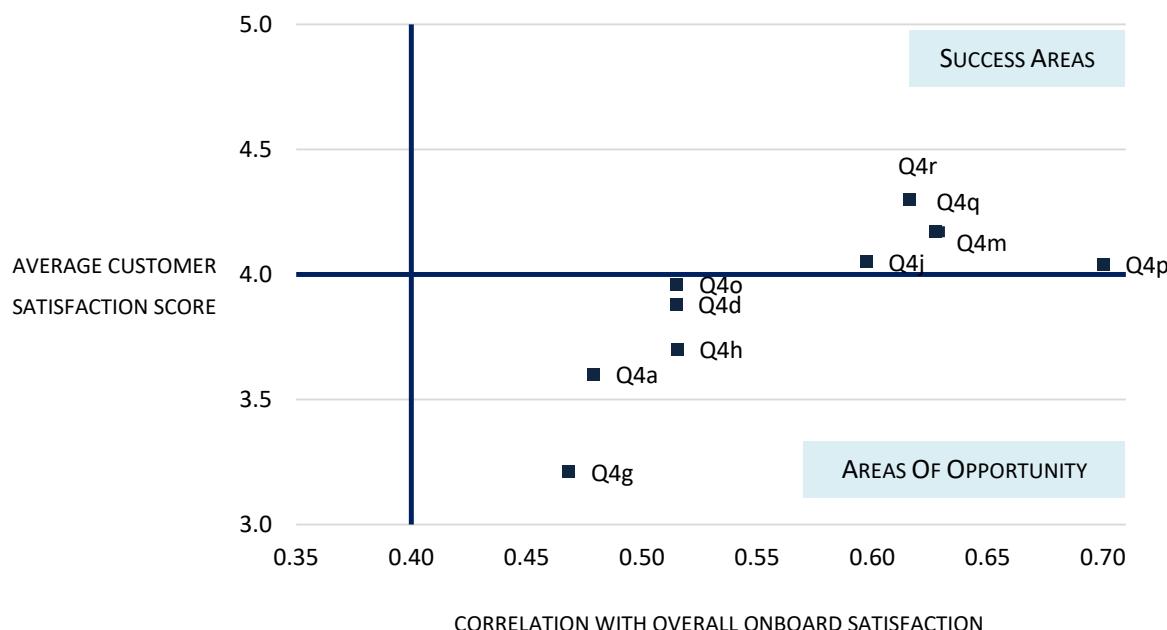
Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

Note: Weighted averages (passenger count) reported.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

KEY DRIVERS OF ONBOARD SERVICES SATISFACTION

Correlation scores between CST questions about onboard services and overall onboard satisfaction were calculated to determine the strongest key drivers. The top 5 **success areas** (items with high correlation scores and CST scores ≥ 4.0) and the top 5 **areas of opportunity** (items with high correlation scores and CST Scores <4.0) are graphed below.



SUCCESS AREAS (TOP 5)	AREAS OF OPPORTUNITY (TOP 5)
Atmosphere on the ferry overall (Q4p)	Workstations (Q4h)
Ease of access, overall (Q4m)	Announcements when you need to be informed (Q4o)
Procedures for unloading (Q4q)	Passages Retail Store (Q4d)
Professionalism of onboard staff (Q4r)	Quality and variety of food/beverages offered (Q4a)
Lounge seating (Q4j)	Pet area (Q4g)

KEY DRIVERS OF ONBOARD SERVICES SATISFACTION BY ROUTE TYPE

The key drivers for overall customer satisfaction were also considered separately for major routes and minor routes. The top five **areas of opportunity** for each are listed in the table below.

MAJOR ROUTES: AREAS OF OPPORTUNITY	CORR	MINOR ROUTES: AREAS OF OPPORTUNITY	CORR
Announcements when you need to be informed	r=0.52	Workstations	r=0.60
Passages Retail Store	r=0.52	Passages Retail Store (Routes 5/9)	r=0.53
Workstations	r=0.51	Pet area	r=0.51
Quality and variety of food/beverages offered	r=0.49	Announcements when you need to be informed	r=0.48
Pet area	r=0.46	Quality and variety of food/beverages offered	r=0.41

Note: Reported correlations are significant to a minimum of $p \leq 0.05$.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Value for Money of Fares

Passenger ratings of “Value for Money of Fares” continue to show a steady improvement in scores YOY since 2016 (increase of +0.06 from last year).

Table 8. Value for Money of Fares

	2016	2017	2018	2019	2020	Change (2019-20)
Major Routes (1, 2, 3, 30)	3.02	3.11	3.28	3.31	3.36	+0.05
Route 1	3.12	3.22	3.32	3.30	3.36	+0.06
Route 2	2.94	3.09	3.17	3.26	3.29	+0.03
Route 3	3.00	2.98	3.45	3.45	3.51	+0.06
Route 30	2.87	3.01	3.09	3.23	3.28	+0.05
Minor Routes (4, 5/9, 19)	3.10	3.08	3.50	3.58	3.68	+0.10
Route 4	3.02	3.09	3.50	3.51	3.71	+0.20 
Routes 5/9	3.16	3.11	3.55	3.61	3.74	+0.13
Route 19	3.07	3.04	3.40	3.50	3.47	-0.03 
Total	3.03	3.11	3.31	3.35	3.41	+0.06

QUESTION: How satisfied or dissatisfied were you, overall, with value for money of fares?

(1 = very dissatisfied; 5 = very satisfied). Satisfied passengers are those who reported a 4 or 5 on the question.

Note: Arrows indicate the largest positive and negatives changes in satisfaction scores since 2019.

Note: Weighted averages (passenger count) reported.

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

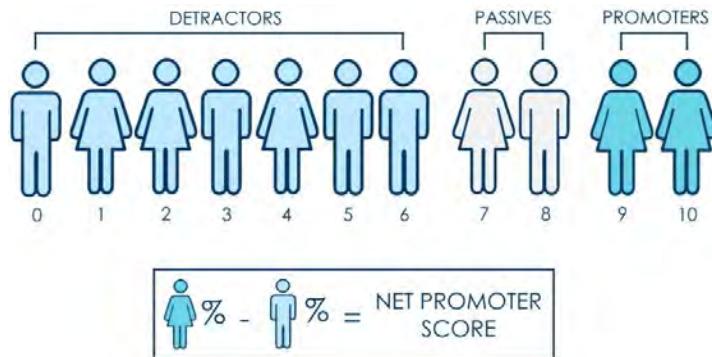
Analysis by route shows that passengers on Routes 5/9 are the most satisfied with value for money of fares (3.74) while passengers travelling on Route 30 are the least satisfied (3.28). Even though Route 30 had the lowest average, it did experience a positive gain since last year (+0.05). The largest positive change however, was experienced by Route 4 (+0.20). Route 19 was the only route to experience a drop in satisfaction with value for money of fares compared to 2019 (-0.03).

Overall, 55% of passengers stated that they were satisfied with value for money of fares.

Customer Perceptions of BC Ferries

NET PROMOTER SCORE

The CST survey asks passengers: *“Based on your experiences with BC Ferries in the past year, how likely are you to recommend BC Ferries to a friend or colleague?”* In answering this question, passengers can be categorized as either promoters or detractors.



Promoters, customers who answer “9” or “10” on the question, are likely to refer others to a brand, thus fueling growth, while those who provide a score of “6” or less are **detractors** (customers who are more likely to damage a brand and impede growth). A Net Promoter Score (NPS) is essentially a balance between these two customer types. Net Promoter Scores range from a low of -100 (every customer is a detractor) to a high of +100 (every customer is a promoter).

Net Promoter Scores for the American airline industry ranged from 4 to 54 (average of 29) in 2018 while the Rental Cars and Transport Industry saw an average of 28 (scores ranged from 8 to 42).⁸ While NPS benchmarks are helpful, within-company NPS tracking is also a recommended approach, particularly when a company does not have direct comparators, such as the case with BC Ferries.

The 2020 Net Promoter Score is 10 points lower this year compared to last. This reflects a 5% decrease overall.

In 2020, BC Ferries achieved
a Net Promoter Score of:

1

(2019 score: 11)

⁸ Source: Temkin Group Q3 2018 Consumer Benchmark Survey.

ENVIRONMENTALLY CONSCIOUS

The CST Survey asks passengers whether or not they believe BC Ferries operates in an environmentally conscious manner. Passenger awareness of BC Ferries' environmental programs was somewhat higher this year compared to last (+4%). Further communication efforts by BC Ferries may have a positive impact on passenger ratings for this question in the future.

53%

of BC Ferries passengers agree that BC Ferries is operating in an environmentally conscious manner.

(2019 score: 49%)

SATISFACTION WITH COVID-19 RESPONSE

In light of the COVID-19 pandemic, passengers were also asked: *"How satisfied or dissatisfied were you, overall, with BC Ferries' response to COVID-19 and the safety measures that have been implemented to help prevent the spread of infectious disease?"*

Almost four in five passengers were satisfied with BC Ferries' response to the pandemic.

78%

of passengers were satisfied with BC Ferries' response to COVID-19.

APPROACHED BY STAFF

The CST Survey also asks passengers whether a BC Ferries staff member approached them during the trip. Fewer passengers reported being approached by staff during their trip this year compared to last year (-5%); likely a result of staff adherence to COVID-19 social distancing measures.

Percentage of passengers who were approached by a BC Ferries staff member during their trip:

2020: 23%

2019: 28%

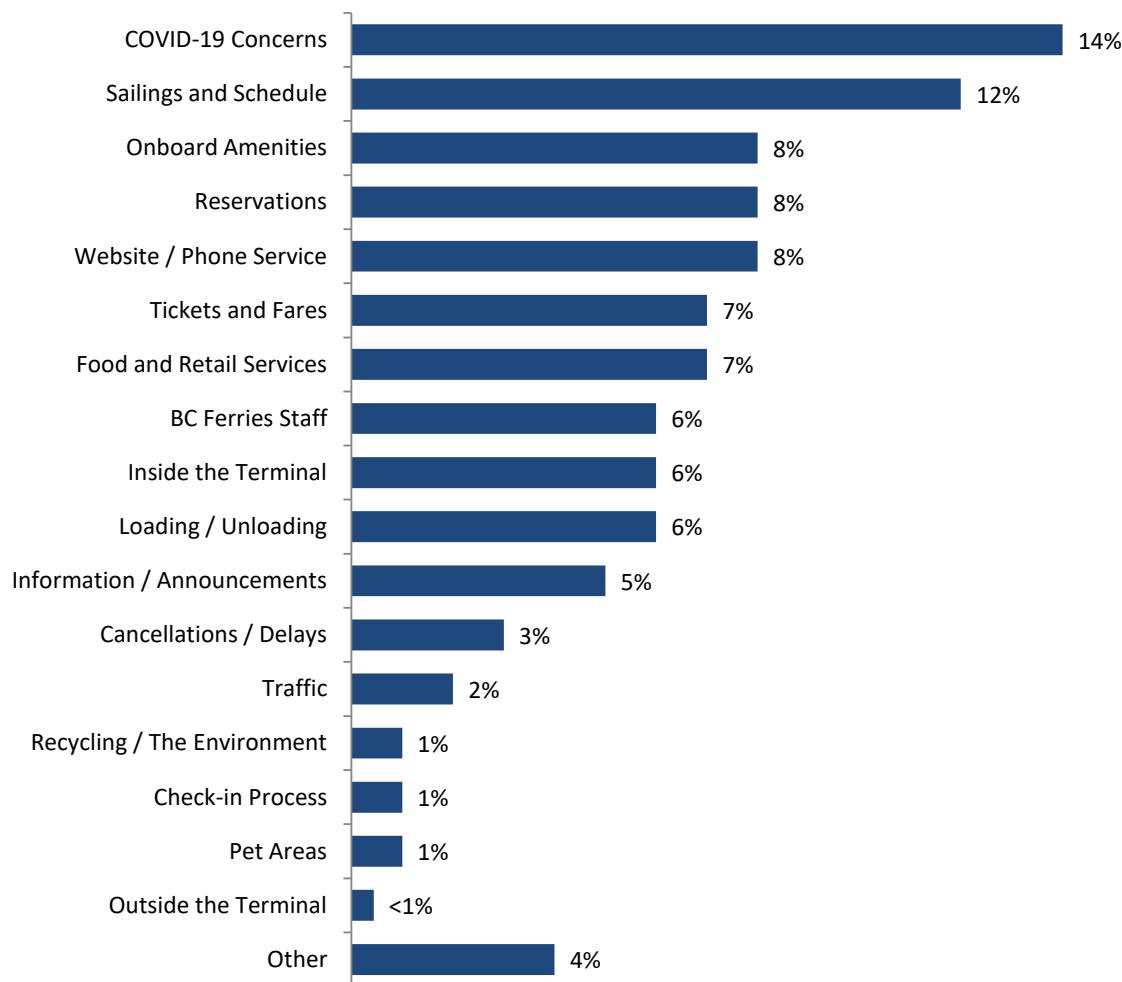
Passenger Suggestions

Passengers were invited to provide comments at the end of the survey in response to the question:

**Do you have any suggestions on how to improve
the services and facilities offered by BC Ferries?**

Passenger responses to this question were transcribed and coded according to 18 unique themes. For situations in which a single passenger suggestion contained multiple themes, each theme was included in the analysis.

Figure 1. Percentage of Passenger Suggestions by Theme



Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

Just over one-quarter of all passenger suggestions in 2020 focused on *COVID-19 Concerns* and *Sailings and Schedules* (14% and 12% of all comments respectively). The next three largest categories of suggested improvements by passengers were *Onboard Amenities*, *Reservations* and *Website/Phone Services*.

Within the *COVID-19 Concerns* category, the large majority of passengers focused their feedback on enforcing safety measures such as mask wearing, physical distancing and enhanced cleaning. Within the *Sailings and Schedule* category, passengers most frequently focused their feedback on: increasing the frequency of sailings; improving connectivity between ferries; and increasing passenger capacity on ferries.

Table 9. Examples of Passenger Comments for Most Frequently Suggested Categories

COVID-19 Concerns	Sailings and Schedules
Mandatory masks when moving on the ship. Many people were not wearing masks and there was nobody telling them to use masks. [Route 2]	Ferries need to run later and more [frequently] during the summer months. [Route 1]
I'd like to see sanitizer stations on the vehicle decks, before the stairwells/elevators. If you hold the rails going up, you can sanitize when you get to the top, but there's nothing at the bottom after holding the heavily used vehicle deck hand rails. [Routes 5/9]	Increase sailings in the summer months and on long holiday weekends. Traveling for Gabriola residents in the summer and on long holiday weekends are difficult with long line-ups. [Wait] times for vessels is long for Gabriola residents who work in Nanaimo. [Route 19]
Social distancing on car decks need to be monitored as motor cyclists and car passengers were not following guidelines. On hot summer days with car windows open, other drivers [were] stopping to chat with occupants in the car next to us [and] were closer than 2 meters. [This] was not appreciated or safe for us. [Route 3]	[Add] larger ferries to Duke Pout running on the hour. [Add] another ferry on this run staggered. [Route 30]
Onboard Amenities	
Faster, more consistent WiFi. More diverse options for food. More local food. [Route 1]	The WiFi is terrible. The pet rooms on board could be improved. They are cold and sometimes wet. [Route 4]
Reservations	
Reservations for medical appointments on SGI routes, including eye/dental care. Better thru fare connections/assured loading. More sailings to SGI and among SGI. [The] ferry system [should be] seen as part of BC road system. [Routes 5/9]	Better ease of access to ticket booth when holding a reservation. Very frustrating to sit in a line to pay when you have a reservation. This is especially problematic on busy days. [I] have been denied boarding by missing [the] time to reach the booth due to line ups. [Route 3]
Website / Phone Service	
The new website on the computer or on my smart phone is unbelievably bad. Give us back the old one or fix it right away. I missed the direct Long Harbour to Vancouver due to software errors in the web page. It is even extremely hard to find where to start making a reservation. Appalling, considering that is the most important function of the web site. [Route 4]	The new website "schedules" are awkward because it doesn't show going and return on the same window. Creates the need for unwarranted clicking around. [Route 2]

Source: 2020 CST Survey – All Waves (R.A. Malatest & Associates)

APPENDIX A – AVERAGE SATISFACTION RATINGS BY ROUTE – ALL WAVES HISTORICAL DATA

Average Satisfaction Ratings by Route - All Waves Historical Data									
	All Waves	Total	1	2	3	30	4	5/9	19
Overall Experience									
Trip Overall	2020	3.97	4.07	3.94	3.70	4.08	4.18	4.09	3.76
2019	4.09	4.16	4.08	4.02	4.12	4.08	3.97	3.99	
2018	4.22	4.32	4.13	4.18	4.21	4.28	4.24	4.03	
2017	4.16	4.26	4.21	3.92	4.14	4.24	4.14	3.99	
2016	4.18	4.29	4.16	3.96	4.19	4.20	4.24	4.14	
(2019-20 Comparison)	-0.12	-0.09	-0.14	-0.32	-0.04	+0.10	+0.12	-0.23	
Terminal Overall	2020	4.01	4.12	3.96	3.75	4.09	4.18	4.15	3.68
2019	4.07	4.11	4.03	3.98	4.15	4.06	4.05	3.92	
2018	4.05	4.13	4.04	3.89	4.13	4.03	4.12	3.85	
2017	4.07	4.15	4.08	3.86	4.10	4.08	4.09	3.97	
2016	4.08	4.12	4.10	3.94	4.13	3.95	4.16	3.95	
(2019-20 Comparison)	-0.06	+0.01	-0.07	-0.23	-0.06	+0.12	+0.10	-0.24	
Onboard Overall	2020	4.11	4.17	4.03	3.99	4.17	4.31	4.20	3.98
2019	4.22	4.24	4.22	4.16	4.25	4.18	4.20	4.12	
2018	4.16	4.22	4.13	4.11	4.14	4.14	4.17	4.01	
2017	4.12	4.19	4.12	4.00	4.15	4.06	4.06	4.07	
2016	4.14	4.21	4.15	4.01	4.17	4.02	4.16	4.07	
(2019-20 Comparison)	-0.11	-0.07	-0.19	-0.17	-0.08	+0.13	0.00	-0.14	
Value for money of fares	2020	3.41	3.36	3.29	3.51	3.28	3.71	3.74	3.47
2019	3.35	3.30	3.26	3.45	3.23	3.51	3.61	3.50	
2018	3.31	3.32	3.17	3.45	3.09	3.50	3.55	3.40	
2017	3.11	3.22	3.09	2.98	3.01	3.09	3.11	3.04	
2016	3.03	3.12	2.94	3.00	2.87	3.02	3.16	3.07	
(2019-20 Comparison)	+0.06	+0.06	+0.03	+0.06	+0.05	+0.20	+0.13	-0.03	

Average Satisfaction Ratings by Route - All Waves Historical Data – Cont.									
	All Waves	Total	Route						
	1	2	3	30	4	5/9	19		
Before Arriving at Terminal									
Usefulness of BC Ferries Website	2020	3.96	4.01	3.93	3.83	4.09	4.07	3.89	3.76
	2019	4.13	4.13	4.11	4.11	4.20	4.12	4.14	4.05
	2018	4.09	4.11	4.13	4.05	4.10	4.11	3.98	4.05
	2017	4.10	4.13	4.12	4.04	4.13	4.09	4.02	4.02
	2016	4.13	4.13	4.14	4.09	4.16	4.20	4.09	4.06
	(2019-20 Comparison)	-0.17	-0.12	-0.18	-0.28	-0.11	-0.05	-0.25	-0.29
Ease of using online reservations	2020	3.88	4.02	3.86	3.59	4.01	-	3.70	-
	2019	4.01	4.09	3.93	3.93	4.07	-	3.92	-
	2018	3.95	4.00	3.99	3.85	3.96	-	3.83	-
	2017	4.00	4.09	3.96	3.89	4.00	-	4.00	-
	2016	3.93	4.04	3.83	3.78	4.03	-	4.05	-
	(2019-20 Comparison)	-0.13	-0.07	-0.07	-0.34	-0.06	-	-0.22	-
BC Ferries phone service <i>(2016-18 question wording: Usefulness of BC Ferries phone service)</i>	2020	3.32	3.42	3.27	3.02	3.48	3.45	3.40	3.31
	2019	3.59	3.63	3.53	3.39	3.67	3.54	3.80	3.39
	2018	3.36	3.63	3.40	2.87	3.19	3.43	3.30	3.51
	2017	3.61	3.73	3.67	3.32	3.62	3.47	3.75	3.28
	2016	3.61	3.85	3.47	3.29	3.67	3.63	3.95	3.25
	(2019-20 Comparison)	-0.27	-0.21	-0.26	-0.37	-0.19	-0.09	-0.40	-0.08
Ease of using/understanding sailing schedules <i>(Question added in 2019)</i>	2020	4.20	4.32	4.23	4.06	4.28	4.22	3.91	4.16
	2019	4.27	4.31	4.30	4.18	4.39	4.16	4.07	4.35
	(2019-20 Comparison)	-0.07	+0.01	-0.07	-0.12	-0.11	+0.06	-0.16	-0.19
Effective communication of service updates <i>(Question added in 2019)</i>	2020	3.94	4.05	3.95	3.74	4.03	4.14	3.81	3.70
	2019	3.95	4.01	3.97	3.83	4.07	3.79	3.80	3.86
	(2019-20 Comparison)	-0.01	+0.04	-0.02	-0.09	-0.04	+0.35	+0.01	-0.16

Average Satisfaction Ratings by Route - All Waves Historical Data – Cont.									
	All Waves	Total	Route						
	1	2	3	30	4	5/9	19		
At the Terminal									
Outside appearance of the terminal <i>(2016-18 question wording: Overall look & décor inside the Terminal you left from (if applicable))</i>	2020	4.15	4.22	4.15	3.93	4.24	4.20	4.22	3.84
	2019	4.17	4.24	4.18	4.00	4.27	3.96	4.15	3.79
	2018	4.04	4.11	4.10	3.85	4.11	3.95	4.08	3.80
	2017	4.06	4.12	4.13	3.83	4.12	4.07	4.05	3.96
	2016	4.05	4.08	4.08	3.92	4.11	3.93	4.07	3.96
	<i>(2019-20 Comparison)</i>	-0.02	-0.02	-0.03	-0.07	-0.03	+0.24	+0.07	+0.05
Overall appearance inside the terminal <i>(2016-18 question wording: Overall look & décor inside the Terminal you left from (if applicable))</i>	2020	4.12	4.18	4.10	3.92	4.22	4.14	4.15	-
	2019	4.17	4.24	4.18	3.98	4.23	3.95	4.12	-
	2018	3.87	3.90	3.95	3.66	3.91	3.78	3.94	-
	2017	3.87	3.95	3.89	3.61	3.91	3.82	3.85	-
	2016	3.88	3.94	3.88	3.72	3.95	3.74	3.83	-
	<i>(2019-20 Comparison)</i>	-0.05	-0.06	-0.08	-0.06	-0.01	+0.19	+0.03	-
Wait time at the terminal <i>(Question added in 2019)</i>	2020	3.73	3.90	3.75	3.33	3.87	3.94	3.80	3.03
	2019	3.81	3.98	3.78	3.63	3.88	3.68	3.58	3.49
	<i>(2019-20 Comparison)</i>	-0.08	-0.08	-0.03	-0.30	-0.01	+0.26	+0.22	-0.46
Ticket Purchase									
Efficiency of the check-in process <i>(Question added in 2019)</i>	2020	4.22	4.30	4.21	4.03	4.27	4.38	4.30	3.98
	2019	4.32	4.32	4.31	4.27	4.34	4.33	4.35	4.30
	<i>(2019-20 Comparison)</i>	-0.10	-0.02	-0.10	-0.24	-0.07	+0.05	-0.05	-0.32
Staff customer service	2020	4.31	4.32	4.29	4.18	4.35	4.44	4.40	4.34
	2019	4.41	4.41	4.39	4.34	4.44	4.42	4.50	4.42
	2018	4.43	4.44	4.45	4.35	4.40	4.43	4.49	4.41
	2017	4.41	4.47	4.42	4.22	4.39	4.42	4.45	4.54
	2016	4.40	4.44	4.47	4.26	4.34	4.37	4.44	4.53
	<i>(2019-20 Comparison)</i>	-0.10	-0.09	-0.10	-0.16	-0.09	+0.02	-0.10	-0.08
Clarity of staff directions	2020	4.30	4.35	4.26	4.16	4.35	4.37	4.33	4.33
	2019	4.39	4.40	4.40	4.33	4.41	4.35	4.40	4.41
	2018	4.41	4.45	4.45	4.34	4.35	4.34	4.44	4.36
	2017	4.38	4.43	4.41	4.22	4.38	4.33	4.35	4.49
	2016	4.37	4.43	4.43	4.21	4.34	4.31	4.35	4.45
	<i>(2019-20 Comparison)</i>	-0.09	-0.05	-0.14	-0.17	-0.06	+0.02	-0.07	-0.08

Average Satisfaction Ratings by Route - All Waves Historical Data – Cont.									
	All Waves	Total	Route						
	1	2	3	30	4	5/9	19		
Terminal Services									
Announcements when you need to be informed	2020	3.96	3.98	3.96	3.83	4.08	4.14	3.93	3.82
	2019	4.08	4.11	4.11	4.04	4.15	3.93	3.98	4.06
	2018	3.86	3.89	3.92	3.71	3.96	3.82	3.83	3.64
	2017	3.84	3.87	3.85	3.73	3.89	3.72	3.80	3.85
	2016	3.90	3.95	3.94	3.78	3.98	3.90	3.84	3.58
(2019-20 Comparison)		-0.12	-0.13	-0.15	-0.21	-0.07	+0.21	-0.05	-0.24
Usefulness of digital information screens <i>(Previous question wording: Usefulness of TV info screens (if Applicable))</i>	2020	3.88	3.95	3.84	3.67	4.03	4.06	3.85	-
	2019	3.92	3.96	3.93	3.84	4.02	3.72	3.75	-
	2018	3.75	3.75	3.73	3.70	3.85	3.72	-	-
	2017	3.75	3.74	3.81	3.69	3.73	3.65	-	-
	2016	3.81	3.88	3.84	3.64	3.83	3.56	-	-
(2019-20 Comparison)		-0.04	-0.01	-0.09	-0.17	+0.01	+0.34	+0.10	-
Quality and variety of merchandise offered at the terminal* <i>(2016-18 question wording: Variety / selection of merchandise)</i>	2020	3.67	3.74	3.54	-	3.78	3.37	3.47	-
	2019	3.71	3.78	3.88	-	3.78	3.19	3.53	-
	2018	3.87	3.94	3.89	-	3.87	3.11	3.55	-
	2017	3.87	3.90	3.91	-	3.85	3.49	3.46	-
	2016	3.89	3.90	3.93	-	3.96	3.50	3.59	-
(2019-20 Comparison)		-0.04	-0.04	-0.34	-	0.00	0.18	-0.06	-
Quality and variety of food/beverages offered at the terminal* <i>(2016-18 question wording: Food / beverages offered)</i>	2020	3.52	3.63	3.30	-	3.61	3.31	3.26	-
	2019	3.58	3.69	3.77	-	3.66	2.96	3.35	-
	2018	3.58	3.64	3.69	-	3.61	2.92	3.54	-
	2017	3.63	3.68	3.72	-	3.64	3.37	3.57	-
	2016	3.68	3.76	3.67	-	3.78	3.26	3.46	-
(2019-20 Comparison)		-0.06	-0.06	-0.47	-	-0.05	+0.35	-0.09	-
Washrooms <i>(Question added in 2019)</i>	2020	4.01	4.10	3.97	3.73	4.17	4.05	4.13	3.70
	2019	4.01	4.06	3.98	3.88	4.11	3.89	4.10	3.71
(2019-20 Comparison)		0.00	+0.04	-0.01	-0.15	+0.06	+0.16	+0.03	-0.01
Procedure for loading	2020	4.12	4.23	4.07	3.86	4.25	4.22	4.14	4.05
	2019	4.15	4.22	4.13	4.06	4.23	4.08	4.05	4.11
	2018	4.08	4.16	4.08	3.88	4.16	4.11	4.09	3.92
	2017	4.06	4.17	4.10	3.80	4.09	4.07	3.95	4.04
	2016	4.10	4.16	4.11	3.96	4.18	4.06	4.02	4.08
(2019-20 Comparison)		-0.03	+0.01	-0.06	-0.20	+0.02	+0.14	+0.09	-0.06
Professionalism of terminal staff	2020	4.28	4.34	4.20	4.16	4.33	4.43	4.29	4.32
	2019	4.36	4.37	4.39	4.26	4.38	4.31	4.41	4.43
	2018	4.25	4.29	4.27	4.12	4.24	4.25	4.31	4.20
	2017	4.24	4.29	4.22	4.09	4.22	4.30	4.29	4.40
	2016	4.22	4.25	4.23	4.12	4.23	4.18	4.26	4.38
(2019-20 Comparison)		-0.08	-0.03	-0.19	-0.10	-0.05	+0.12	-0.12	-0.11

*2019 total score has been updated. Total scores for 2019 and 2020 reflect customer assessments of food and merchandise services at Tsawwassen, Swartz Bay and Departure Bay terminals only.

Average Satisfaction Ratings by Route - All Waves Historical Data – Cont.									
	All Waves	Total	Route						
	1	2	3	30	4	5/9	19		
Terminal (Foot Passengers ONLY)									
Parking options at the terminal <i>(Question added in 2019)</i>	2020	3.70	3.94	3.72	3.59	4.01	3.77	3.97	2.31
2019	3.43	3.55	3.47	3.19	3.53	2.84	3.54	2.69	
<i>(2019-20 Comparison)</i>	+0.27	+0.39	+0.25	+0.40	+0.48	+0.93	+0.43	-0.38	
Ease of using passenger drop-off/pick-up area	2020	4.10	4.33	4.12	3.94	4.18	4.13	4.33	2.94
2019	3.95	3.98	3.98	3.97	4.00	3.66	3.94	3.10	
2018	3.98	4.17	3.89	3.92	4.01	3.84	4.11	3.01	
2017	3.94	4.08	3.96	3.80	4.04	3.68	3.75	3.15	
2016	4.01	4.19	3.94	3.98	4.28	3.45	3.67	3.31	
<i>(2019-20 Comparison)</i>	+0.15	+0.35	+0.14	-0.03	+0.18	+0.47	+0.39	-0.16	
Pre-boarding passenger lounge at terminal <i>(Question added in 2019)</i>	2020	3.86	3.83	3.87	3.90	3.77	3.96	4.25	3.13
2019	3.79	3.77	3.89	3.79	3.79	3.90	3.75	3.36	
<i>(2019-20 Comparison)</i>	+0.07	+0.06	-0.02	+0.11	-0.02	+0.06	+0.50	-0.23	
Onboard Experience									
Food Services									
Quality and variety of food/beverages offered <i>(2016-18 question wording: Food / beverages offered)</i>	2020	3.60	3.70	3.54	3.61	3.62	-	3.43	-
2019	3.75	3.80	3.77	3.74	3.86	-	3.39	-	
2018	3.66	3.67	3.72	3.57	3.72	-	3.47	-	
2017	3.63	3.65	3.70	3.45	3.70	-	3.45	-	
2016	3.69	3.72	3.65	3.70	3.77	-	3.49	-	
<i>(2019-20 Comparison)</i>	-0.15	-0.10	-0.23	-0.13	-0.24	-	+0.04	-	
Value for money	2020	3.23	3.29	3.14	3.26	3.16	-	3.36	-
2019	3.23	3.25	3.24	3.20	3.20	-	3.23	-	
2018	3.21	3.28	3.19	3.15	3.17	-	3.14	-	
2017	3.19	3.23	3.22	3.03	3.21	-	3.25	-	
2016	3.19	3.18	3.19	3.17	3.26	-	3.18	-	
<i>(2019-20 Comparison)</i>	0.00	+0.04	-0.10	+0.06	-0.04	-	+0.13	-	
Staff customer service	2020	4.14	4.15	4.12	4.13	4.18	-	4.13	-
2019	4.30	4.30	4.32	4.29	4.32	-	4.26	-	
2018	4.21	4.20	4.23	4.18	4.21	-	4.23	-	
2017	4.20	4.19	4.24	4.07	4.26	-	4.24	-	
2016	4.18	4.16	4.20	4.15	4.23	-	4.13	-	
<i>(2019-20 Comparison)</i>	-0.16	-0.15	-0.20	-0.16	-0.14	-	-0.13	-	

Average Satisfaction Ratings by Route - All Waves Historical Data – Cont.									
	All Waves	Total	Route						
			1	2	3	30	4	5/9	19
Onboard Facilities/Services									
Passages Retail Store <i>(Question added in 2019)</i> <i>(2019-20 Comparison)</i>	2020	3.88	3.98	3.84	3.78	3.98	-	3.66	-
	2019	4.03	4.03	4.05	4.02	4.10	-	3.85	-
		-0.15	-0.05	-0.21	-0.24	-0.12	-	-0.19	-
Washrooms <i>(Question added in 2019)</i> <i>(2019-20 Comparison)</i>	2020	4.07	4.17	4.00	3.97	4.16	3.95	4.16	3.65
	2019	4.05	4.06	4.04	4.00	4.10	3.76	4.14	3.59
		+0.02	+0.11	-0.04	-0.03	+0.06	+0.19	+0.02	+0.06
Play area for children <i>(Question not asked in 2020 – service closed due to COVID-19 pandemic)</i> <i>(2019-20 Comparison)</i>	2020	-	-	-	-	-	-	-	-
	2019	3.56	3.73	3.47	3.54	3.39	-	3.27	-
	2018	3.27	3.69	3.19	2.77	3.19	-	3.09	-
	2017	3.55	3.69	3.66	3.42	3.47	-	2.92	-
	2016	3.40	3.55	3.51	3.14	3.33	-	2.92	-
		-	-	-	-	-	-	-	-
Pet area	2020	3.21	3.07	3.15	3.45	3.19	-	3.29	-
	2019	3.16	3.14	3.14	3.24	3.14	-	3.16	-
	2018	2.50	2.58	2.51	2.21	2.20	-	3.29	-
	2017	2.77	3.49	2.39	2.79	3.07	-	2.11	-
	2016	2.56	2.62	2.69	2.64	2.14	-	1.24	-
		+0.05	-0.07	+0.01	+0.21	+0.05	-	+0.13	-
Workstations	2020	3.70	3.76	3.54	3.73	3.79	-	3.75	-
	2019	3.83	3.87	3.78	3.79	3.76	-	3.87	-
	2018	3.70	3.76	3.60	3.57	3.82	-	3.94	-
	2017	3.71	3.81	3.57	3.74	3.59	-	3.83	-
	2016	3.65	3.72	3.61	3.57	3.69	-	3.61	-
		-0.13	-0.11	-0.24	-0.06	+0.03	-	-0.12	-
Outside decks	2020	4.18	4.31	4.08	4.12	4.22	4.21	4.20	3.74
	2019	4.22	4.30	4.23	4.16	4.20	3.89	4.21	3.89
	2018	4.07	4.18	4.04	3.97	4.04	3.93	4.11	3.80
	2017	4.01	4.04	3.99	3.94	4.10	3.96	3.98	3.95
	2016	4.04	4.13	4.02	3.95	4.10	3.83	4.01	3.89
		-0.04	+0.01	-0.15	-0.04	+0.02	+0.32	-0.01	-0.15
Lounge Seating <i>(Question added in 2019)</i> <i>(2019-20 Comparison)</i>	2020	4.05	4.15	3.86	4.09	4.09	-	4.13	-
	2019	4.12	4.13	4.06	4.19	4.08	-	4.13	-
		-0.07	+0.02	-0.20	-0.10	+0.01	-	0.00	-
SeaWest Lounge <i>(Question added in 2019)</i> <i>(Question not asked in 2020 – service closed due to COVID-19 pandemic)</i> <i>(2019-20 Comparison)</i>	2020	-	-	-	-	-	-	-	-
	2019	3.74	3.83	3.68	-	3.40	-	-	-
		-	-	-	-	-	-	-	-

Average Satisfaction Ratings by Route - All Waves Historical Data – <i>Cont.</i>									
	All Waves	Total	Route						
			1	2	3	30	4	5/9	19
Onboard Facilities/Services – <i>Cont.</i>									
Outside appearance of the vessel overall	2020	4.18	4.30	4.10	4.04	4.18	4.22	4.22	3.97
	2019	4.16	4.25	4.11	4.06	4.17	3.97	4.14	3.91
	2018	4.05	4.19	3.95	3.92	4.02	3.99	4.17	3.84
	2017	4.00	4.11	3.93	3.86	4.06	4.00	3.97	3.90
	2016	4.00	4.12	3.97	3.85	4.05	3.89	3.94	3.91
	(2019-20 Comparison)	+0.02	+0.05	-0.01	-0.02	+0.01	+0.25	+0.08	+0.06
Ease of access, overall (for people with accessibility requirements) † For all passengers (2016-18 question wording: Ease of access, overall, for people with disabilities)	2020	3.85	3.89	3.77	3.68	4.25	3.91	3.60	3.77
	2020^t	4.17	4.29	4.11	4.02	4.22	4.25	4.19	3.98
	2019	3.93	3.99	4.10	3.70	4.16	4.18	3.62	3.74
	2019 ^t	4.19	4.25	4.19	4.11	4.24	4.09	4.10	4.00
	2018	3.75	3.93	3.77	3.63	3.88	3.39	3.65	2.97
	2017	3.66	3.88	3.69	3.57	3.93	3.45	3.22	2.75
(2019-20 Comparison)	2016	3.72	3.89	3.67	3.60	3.83	3.38	3.61	3.41
	(2019-20 ^t Comparison)	-0.08	-0.10	-0.33	-0.02	+0.09	-0.27	-0.02	+0.03
	(2019-20 ^t Comparison)	-0.02	+0.04	-0.08	-0.09	-0.02	+0.16	+0.09	-0.02
Ease of finding facilities / services	2020	4.16	4.23	4.11	4.08	4.18	4.12	4.24	3.97
	2019	4.19	4.20	4.19	4.19	4.25	4.07	4.18	4.04
	2018	3.94	3.96	3.93	3.88	3.99	3.79	4.04	3.75
	2017	3.96	3.98	3.98	3.89	4.06	3.86	3.99	3.76
	2016	3.95	3.95	3.95	3.94	4.03	3.74	3.91	3.90
	(2019-20 Comparison)	-0.03	+0.03	-0.08	-0.11	-0.07	+0.05	+0.06	-0.07
Announcements when you need to be informed	2020	3.96	3.97	3.96	3.86	4.07	4.07	3.94	3.85
	2019	4.09	4.10	4.11	4.08	4.18	4.00	4.01	3.97
	2018	3.96	3.96	4.01	3.87	4.08	3.84	3.96	3.71
	2017	3.90	3.88	3.95	3.82	4.05	3.80	3.85	3.82
	2016	3.96	3.98	3.98	3.90	4.09	3.81	3.95	3.57
	(2019-20 Comparison)	-0.13	-0.13	-0.15	-0.22	-0.11	+0.07	-0.07	-0.12
Atmosphere on the ferry overall (2016-18 question wording: Atmosphere / environment)	2020	4.04	4.08	3.96	3.98	4.07	4.16	4.17	3.97
	2019	4.21	4.24	4.21	4.17	4.24	4.05	4.20	4.04
	2018	3.98	4.01	3.96	3.91	4.06	3.90	4.08	3.74
	2017	3.97	4.02	3.95	3.85	4.08	3.82	3.99	3.90
	2016	4.00	4.03	3.99	3.92	4.14	3.77	4.00	3.87
	(2019-20 Comparison)	-0.17	-0.16	-0.25	-0.19	-0.17	+0.11	-0.03	-0.07
Procedures for unloading	2020	4.17	4.28	4.14	3.94	4.24	4.27	4.18	3.95
	2019	4.18	4.23	4.17	4.08	4.25	4.08	4.14	4.08
	2018	4.03	4.10	4.02	3.90	4.08	4.06	4.04	3.92
	2017	4.01	4.08	4.03	3.83	4.07	4.00	4.01	3.98
	2016	4.04	4.10	4.02	3.92	4.13	3.99	4.06	3.96
	(2019-20 Comparison)	-0.01	+0.05	-0.03	-0.14	-0.01	+0.19	+0.04	-0.13

Average Satisfaction Ratings by Route - All Waves Historical Data – <i>Cont.</i>									
	All Waves	Total	Route						
			1	2	3	30	4	5/9	19
Onboard Facilities/Services – <i>Cont.</i>									
Professionalism of onboard staff	2020	4.30	4.36	4.25	4.18	4.33	4.39	4.37	4.31
	2019	4.40	4.41	4.42	4.37	4.39	4.31	4.39	4.35
	2018	4.27	4.31	4.27	4.16	4.27	4.27	4.31	4.25
	2017	4.26	4.30	4.26	4.14	4.29	4.27	4.29	4.32
	2016	4.24	4.27	4.27	4.14	4.26	4.22	4.26	4.27
	(2019-20 Comparison)	-0.10	-0.05	-0.17	-0.19	-0.06	+0.08	-0.02	-0.04
Experience with the sailing schedule									
Earliest ferry early enough	2020	3.89	3.89	3.89	3.85	3.96	3.94	3.86	3.97
	2019	3.94	3.99	3.95	3.90	3.98	4.06	3.79	3.96
	2018	4.02	4.03	4.04	4.07	4.09	4.00	3.89	3.65
	2017	3.98	4.01	4.06	3.87	4.12	4.01	3.83	3.68
	2016	3.94	4.01	4.01	3.87	3.92	3.91	3.81	3.57
	(2019-20 Comparison)	-0.05	-0.10	-0.06	-0.05	-0.02	-0.12	+0.07	+0.01
Latest ferry late enough	2020	3.77	3.77	3.79	3.77	3.89	3.52	3.67	3.76
	2019	3.75	3.76	3.83	3.69	3.88	3.38	3.61	3.72
	2018	3.76	3.82	3.69	3.80	3.94	3.24	3.65	3.74
	2017	3.54	3.67	3.58	3.10	3.83	3.24	3.55	3.69
	2016	3.51	3.74	3.56	3.00	3.64	3.28	3.54	3.55
	(2019-20 Comparison)	+0.02	+0.01	-0.04	+0.08	+0.01	+0.14	+0.06	+0.04
Ferry sailing frequent enough	2020	3.36	3.74	3.26	2.71	3.52	3.70	3.15	3.23
	2019	3.41	3.78	3.34	2.86	3.43	3.41	2.99	3.24
	2018	3.36	3.80	3.27	2.77	3.33	3.29	3.08	3.12
	2017	3.36	3.80	3.41	2.54	3.33	3.43	2.95	3.28
	2016	3.40	3.76	3.39	2.87	3.40	3.42	3.00	3.30
	(2019-20 Comparison)	-0.05	-0.04	-0.08	-0.15	+0.09	+0.29	+0.16	-0.01
Ability to get onto desired sailing	2020	3.81	4.03	3.76	3.34	3.87	4.06	4.04	3.33
	2019	3.76	3.92	3.68	3.49	3.78	3.64	3.86	3.38
	2018	3.55	3.77	3.46	3.23	3.54	3.65	3.80	3.18
	2017	3.62	3.84	3.60	3.19	3.66	3.69	3.72	3.34
	2016	3.70	3.91	3.63	3.37	3.63	3.77	3.91	3.42
	(2019-20 Comparison)	+0.05	+0.11	+0.08	-0.15	+0.09	+0.42	+0.18	-0.05
Ability to connect with other sailings (based on those connecting)	2020	3.36	3.44	3.25	3.17	3.51	3.46	3.51	3.32
	2019	3.37	3.82	2.86	3.21	3.80	3.14	3.44	3.04
	2018	3.30	3.15	3.04	3.69	3.78	3.52	3.29	2.62
	2017	3.12	3.75	2.76	3.04	3.63	3.23	3.46	2.55
	2016	3.15	3.47	3.14	2.87	2.97	3.53	3.81	2.70
	(2019-20 Comparison)	-0.01	-0.38	+0.39	-0.04	-0.29	+0.32	+0.07	+0.28

Average Satisfaction Ratings by Route - All Waves Historical Data – <i>Cont.</i>									
	All Waves	Total	Route						
	1	2	3	30	4	5/9	19		
Experience with the sailing schedule – <i>Cont.</i>									
Ferry running on time <i>(2016-18 question wording: Ferry departing on time)</i>	2020	3.84	3.94	3.97	3.54	3.97	4.23	3.71	2.88
2019	3.93	4.12	4.08	3.66	4.08	3.95	3.33	3.38	
2018	3.86	4.17	3.59	3.55	4.04	4.02	3.82	3.33	
2017	3.73	4.01	3.81	3.04	3.82	4.07	3.60	3.43	
2016	3.80	4.06	3.85	3.10	3.94	3.93	3.83	3.75	
<i>(2019-20 Comparison)</i>	-0.09	-0.18	-0.11	-0.12	-0.11	+0.28	+0.38	-0.50	

Safety									
Safety of ferry operations	2020	4.28	4.32	4.23	4.17	4.32	4.33	4.36	4.35
2019	4.35	4.40	4.34	4.28	4.36	4.32	4.35	4.27	
2018	4.28	4.34	4.25	4.20	4.24	4.25	4.30	4.25	
2017	4.25	4.26	4.28	4.16	4.26	4.26	4.29	4.26	
2016	4.25	4.30	4.23	4.13	4.29	4.17	4.26	4.26	
<i>(2019-20 Comparison)</i>	-0.07	-0.08	-0.11	-0.11	-0.04	+0.01	+0.01	+0.08	

APPENDIX B - AVERAGE SATISFACTION RATINGS BY TERMINAL - ALL WAVES HISTORICAL DATA

Average Satisfaction Ratings by Terminal - All Waves Historical Data

		Terminals									
	All Waves	Total	Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Fulford Harbour	Nanaimo Harbour	Gabriola
Overall Experience											
Trip Overall	2020	3.97	4.06	4.10	3.83	3.91	3.79	4.07	4.08	3.84	3.67
	2019	4.09	4.16	4.10	4.07	4.10	3.94	4.16	4.13	4.08	3.88
	2018	4.22	4.23	4.38	4.14	4.12	4.22	4.29	4.22	4.06	3.98
	2017	4.16	4.24	4.26	4.10	4.15	3.97	4.09	4.26	-	-
	2016	4.18	4.26	4.29	4.04	4.17	4.03	4.20	4.15	-	-
<i>Change (2019-20 Comparison)</i>		-0.12	-0.10	0.00	-0.24	-0.19	-0.15	-0.09	-0.05	-0.24	-0.21
Terminal Overall	2020	4.01	4.13	4.10	3.88	3.96	3.75	4.09	4.13	3.81	3.54
	2019	4.07	4.13	4.07	4.00	4.09	3.95	4.17	4.02	4.12	3.71
	2018	4.05	4.15	4.10	3.94	4.12	3.87	4.15	3.97	4.02	3.64
	2017	4.07	4.16	4.14	3.98	4.07	3.90	3.99	4.03	-	-
	2016	4.08	4.14	4.11	4.00	4.17	3.91	4.07	3.85	-	-
<i>Change (2019-20 Comparison)</i>		-0.06	0.00	+0.03	-0.12	-0.13	-0.20	-0.08	+0.11	-0.31	-0.17
Value for money of fares	2020	3.41	3.35	3.51	3.41	3.18	3.57	3.24	3.55	3.39	3.55
	2019	3.35	3.32	3.36	3.35	3.26	3.42	3.27	3.52	3.45	3.54
	2018	3.31	3.23	3.38	3.31	3.13	3.47	3.07	3.55	3.41	3.38
	2017	3.11	3.18	3.20	3.06	3.02	3.04	2.99	3.07	-	-
	2016	3.03	3.03	3.14	2.90	3.00	3.09	2.84	3.08	-	-
<i>Change (2019-20 Comparison)</i>		+0.06	+0.03	+0.15	+0.06	-0.08	+0.15	-0.03	+0.03	-0.06	+0.01
At the Terminal											
Outside appearance of the terminal	2020	4.15	4.25	4.20	4.09	4.15	3.89	4.19	4.09	3.91	3.75
	2019	4.17	4.27	4.18	4.10	4.23	3.94	4.29	3.91	3.94	3.62
	2018	4.04	4.14	4.06	3.95	4.19	3.82	4.12	3.94	3.95	3.61
	2017	4.06	4.14	4.10	3.92	4.25	3.89	4.10	4.05	-	-
	2016	4.05	4.08	4.08	3.98	4.16	3.85	4.09	3.88	-	-
<i>Change (2019-20 Comparison)</i>		-0.02	-0.02	+0.02	-0.01	-0.08	-0.05	-0.10	+0.18	-0.03	+0.13
Overall appearance inside the terminal (<i>Previous question wording: Overall look & décor inside the terminal you left from (if applicable)</i>)	2020	4.12	4.23	4.13	4.06	4.06	3.91	4.15	4.07	-	-
	2019	4.17	4.26	4.16	4.09	4.26	3.92	4.22	3.89	-	-
	2018	3.87	3.95	3.83	3.80	4.04	3.58	3.86	3.78	-	-
	2017	3.87	3.97	3.92	3.71	3.99	3.58	3.85	3.87	-	-
	2016	3.88	3.91	3.98	3.74	4.03	3.66	3.97	3.65	-	-
<i>Change (2019-20 Comparison)</i>		-0.05	-0.03	-0.03	-0.03	-0.20	-0.07	-0.07	+0.18	-	-
Wait time at the terminal (<i>Question added in 2019</i>)	2020	3.73	3.88	3.87	3.62	3.72	3.30	3.89	3.88	3.25	2.79
	2019	3.81	3.94	3.89	3.70	3.86	3.61	3.95	3.59	3.71	3.25
<i>Change (2019-20 Comparison)</i>		-0.08	-0.06	-0.02	-0.08	-0.14	-0.31	-0.06	+0.29	-0.46	-0.46

Average Satisfaction Ratings by Terminal - All Waves Historical Data - Cont.

			Terminals								
	All Waves	Total	Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Fulford Harbour	Nanaimo Harbour	Gabriola
At the Terminal											
Ticket Purchase											
Efficiency of the check in process <i>(Question added in 2019)</i>	2020	4.22	4.32	4.26	4.12	4.23	4.07	4.25	4.31	4.05	3.87
	2019	4.32	4.33	4.31	4.32	4.33	4.19	4.39	4.35	4.36	4.24
<i>Change (2019-20 Comparison)</i>	-0.10	-0.01	-0.05	-0.20	-0.10	-0.12	-0.14	-0.04	-0.31	-0.37	
Staff customer service	2020	4.31	4.34	4.33	4.26	4.28	4.18	4.34	4.46	4.32	4.35
	2019	4.41	4.46	4.37	4.37	4.43	4.26	4.44	4.51	4.46	4.39
	2018	4.43	4.44	4.43	4.36	4.49	4.41	4.42	4.35	4.43	4.39
	2017	4.41	4.46	4.46	4.35	4.39	4.24	4.36	4.37	-	-
	2016	4.40	4.42	4.43	4.34	4.53	4.25	4.28	4.34	-	-
<i>Change (2019-20 Comparison)</i>	-0.10	-0.12	-0.04	-0.11	-0.15	-0.08	-0.10	-0.05	-0.14	-0.04	
Clarity of staff directions	2020	4.30	4.35	4.32	4.21	4.29	4.18	4.38	4.38	4.37	4.29
	2019	4.39	4.44	4.35	4.36	4.40	4.30	4.41	4.51	4.41	4.42
	2018	4.41	4.45	4.41	4.37	4.46	4.41	4.34	4.34	4.36	4.37
	2017	4.38	4.42	4.42	4.33	4.39	4.24	4.34	4.29	-	-
	2016	4.37	4.42	4.40	4.31	4.48	4.18	4.31	4.23	-	-
<i>Change (2019-20 Comparison)</i>	-0.09	-0.09	-0.03	-0.15	-0.11	-0.12	-0.03	-0.13	-0.04	-0.13	
Terminal Services											
Announcements when you need to be informed	2020	3.96	4.02	3.91	3.95	3.85	3.87	4.16	4.16	3.83	3.82
	2019	4.08	4.13	4.04	4.07	4.20	3.97	4.16	3.92	4.15	3.97
	2018	3.86	3.92	3.83	3.79	3.96	3.75	4.08	3.87	3.60	3.67
	2017	3.84	3.90	3.81	3.73	3.94	3.76	3.96	3.71	-	-
	2016	3.90	3.91	3.98	3.75	4.07	3.87	4.11	3.85	-	-
<i>Change (2019-20 Comparison)</i>	-0.12	-0.11	-0.13	-0.12	-0.35	-0.10	0.00	+0.24	-0.32	-0.15	
Usefulness of digital information screens <i>(2016-18 question wording: Usefulness of TV info screens (if Applicable))</i>	2020	3.88	3.96	3.93	3.85	3.71	3.66	4.05	4.06	-	-
	2019	3.92	4.01	3.85	3.88	3.98	3.87	4.01	3.78	-	-
	2018	3.75	3.63	3.88	3.68	3.78	3.75	4.01	3.78	-	-
	2017	3.75	3.66	3.81	3.75	3.80	3.72	3.75	3.70	-	-
	2016	3.81	3.84	3.85	3.75	3.89	3.55	3.89	3.58	-	-
<i>Change (2019-20 Comparison)</i>	-0.04	-0.05	+0.08	-0.03	-0.27	-0.21	+0.04	+0.28	-	-	
Quality and variety of merchandise offered at the terminal* <i>(2016-18 question wording: Variety / selection of merchandise)</i>	2020	3.67	3.79	3.57	-	3.54	-	-	-	-	-
	2019	3.77	3.86	3.60	-	3.91	-	-	-	-	-
	2018	3.87	3.96	3.84	-	3.94	-	-	-	-	-
	2017	3.87	3.95	3.85	-	3.90	-	-	-	-	-
	2016	3.89	3.92	3.88	-	3.92	-	-	-	-	-
<i>Change (2019-20 Comparison)</i>	-0.10	-0.07	-0.03	-	-0.37	-	-	-	-	-	-

*2019 total score has been updated. Total scores for 2019 and 2020 reflect customer assessments of food and merchandise services at Tsawwassen, Swartz Bay and Departure Bay terminals only.

Average Satisfaction Ratings by Terminal - All Waves Historical Data - Cont.

			Terminals								
	All Waves	Total	Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Fulford Harbour	Nanaimo Harbour	Gabriola
Terminal Services – Cont.											
Quality and variety of food/beverages offered at the terminal*	2020	3.52	3.67	3.42	-	3.30	-	-	-	-	-
2019	3.66	3.80	3.43	-	3.78	-	-	-	-	-	-
2018	3.58	3.76	3.45	-	3.78	-	-	-	-	-	-
(2016-18 question wording: Food / beverages offered)	3.63	3.84	3.53	-	3.70	-	-	-	-	-	-
2016	3.68	3.87	3.65	-	3.76	-	-	-	-	-	-
Change (2019-20 Comparison)	-0.14	-0.13	-0.01	-	-0.48	-	-	-	-	-	-

Washrooms <i>(Question added in 2019)</i>	2020	4.01	4.18	4.03	3.84	4.00	3.77	4.14	4.03	3.60	3.79
2019	4.01	4.09	4.04	3.94	4.04	3.82	4.14	3.96	3.80	3.61	
Change (2019-20 Comparison)	0.00	+0.09	-0.01	-0.10	-0.04	-0.05	0.00	+0.07	-0.20	+0.18	

Procedure for loading	2020	4.12	4.22	4.21	4.00	4.04	3.87	4.27	4.27	4.14	3.95
2019	4.15	4.20	4.19	4.13	4.15	3.99	4.27	4.08	4.19	4.03	
2018	4.08	4.12	4.17	3.95	4.12	3.92	4.29	4.14	3.96	3.86	
2017	4.06	4.15	4.15	3.96	4.10	3.79	4.11	4.09	-	-	
2016	4.10	4.16	4.15	3.98	4.18	4.01	4.22	3.99	-	-	
Change (2019-20 Comparison)	-0.03	+0.02	+0.02	-0.13	-0.11	-0.12	0.00	+0.19	-0.05	-0.08	

Professionalism of terminal staff	2020	4.28	4.34	4.33	4.17	4.24	4.15	4.35	4.43	4.37	4.27
2019	4.36	4.36	4.38	4.35	4.39	4.23	4.39	4.35	4.50	4.37	
2018	4.25	4.25	4.29	4.17	4.29	4.17	4.36	4.27	4.17	4.24	
2017	4.24	4.29	4.28	4.18	4.18	4.11	4.17	4.33	-	-	
2016	4.22	4.24	4.25	4.14	4.26	4.17	4.26	4.15	-	-	
Change (2019-20 Comparison)	-0.08	-0.02	-0.05	-0.18	-0.15	-0.08	-0.04	+0.08	-0.13	-0.10	

Terminal (Foot Passengers ONLY)											
Parking options at the terminal <i>(Question added in 2019)</i>	2020	3.70	3.84	3.96	3.69	3.65	3.60	4.04	3.92	2.27	2.35
2019	3.43	3.50	3.54	3.16	3.67	3.30	3.57	2.64	2.89	2.53	
Change (2019-20 Comparison)	+0.27	+0.34	+0.42	+0.53	-0.02	+0.30	+0.47	+1.28	-0.62	-0.18	

Ease of using passenger drop-off/pick-up area	2020	4.10	4.40	4.19	4.06	4.12	3.93	4.21	4.21	3.00	2.88
2019	3.95	4.04	3.91	3.91	4.12	3.95	4.01	3.32	3.37	2.85	
2018	3.98	4.00	4.28	3.75	4.07	4.12	4.01	3.57	3.02	2.99	
2017	3.94	4.11	4.00	3.83	4.03	3.82	4.13	3.38	-	-	
2016	4.01	4.18	4.20	3.88	4.07	3.98	4.34	3.47	-	-	
Change (2019-20 Comparison)	+0.15	+0.36	+0.28	+0.15	0.00	-0.02	+0.20	+0.89	-0.37	+0.03	

Pre-boarding passenger lounge at terminal <i>(Question added in 2019)</i>	2020	3.86	3.83	3.99	3.91	3.98	3.74	3.71	3.87	3.21	3.06
2019	3.79	3.75	3.79	3.79	4.08	3.72	3.83	3.96	3.63	3.07	
Change (2019-20 Comparison)	+0.07	+0.08	+0.20	+0.12	-0.10	+0.02	-0.12	-0.09	-0.42	-0.01	

*2019 total score has been updated. Total scores for 2019 and 2020 reflect customer assessments of food and merchandise services at Tsawwassen, Swartz Bay and Departure Bay terminals only.

APPENDIX C - AVERAGE SATISFACTION RATINGS FOR PANEL MEMBERS

Average Satisfaction Rating		All Waves 2019	All Waves 2020	Change (2019-20)
Overall satisfaction with most recent experience travelling with BC Ferries		3.87	3.88	+0.01
Net Promoter Score (NPS)		-9	-5	+4

APPENDIX E - INTERCEPT POSTCARD

Figure 1: Postcard Front



Figure 2: Postcard Back



