

Customer Satisfaction Tracking Annual Report 2010

British Columbia Ferry Services Inc.

Presented to:

British Columbia Ferry Services Inc.
Victoria, British Columbia



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Executive Overview

Background

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

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

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

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

In addition to graphs showing the overall scores, the Appendix in this report includes detailed tables by route showing satisfaction scores for each of the service attributes for 2010. The Appendix also includes detailed satisfaction scores for each of the terminal-related attributes, shown separately for each of the main terminals.

Methodology

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

Interviews are distributed across nine routes in total, both larger and smaller, during three different time periods: June, August and November. In 2010, a total of 11,791 screeners were completed and 4,741 questionnaires returned. A more detailed explanation of the research design is included in the *Research Methodology* section, in the Appendix of this report.

Findings

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

Satisfaction with BC Ferries Overall

- A total of 89% of passengers in 2010 reported to be satisfied overall with their experience travelling on BC Ferries, a marginal decrease from 91% in 2009. An overall score of 4.22 has been achieved (on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'), compared with 4.26 achieved in 2009, but still higher than most previous measures.
- While the overall satisfaction scores have fallen slightly, there have been no significant shifts by individual route.

Satisfaction before Arriving at Terminal

- Ratings of the BC Ferries web site, phone service, the reservation's system, as well as highway signage have been stable.

Satisfaction at the Terminal

- Overall satisfaction with the experience at the terminal before boarding is also consistent with a year ago (85% versus 86% a year ago), with no significant change in the average score of 4.07 (compared with 4.08 in 2009).
- Satisfaction is consistent at most terminals with the only notable difference being an increase in ratings amongst passengers at Departure Bay (average increasing from 3.92 in 2009 to 4.20 in 2010).
- Following a number of increases in satisfaction in 2009, ratings in 2010 have remained stable with respect to all attributes and services at the terminal, with no significant changes occurring. Only slightly higher levels of dissatisfaction are recorded with respect to availability of parking spaces and with parking value for money.

Satisfaction Onboard

[NOTE: For route-specific results that follow, please refer to page 5 for all the route number codes]

- A total of 89% of passengers in 2010 were satisfied with their overall experience onboard, for an overall rating of 4.14 on the 5-point scale, consistent with the average score achieved in 2009 (4.15) which was the highest score achieved to-date. Most routes are consistent with a year ago with the exception of Route 4 which improved slightly.
- Satisfaction levels continue to trend upwards with respect to most aspects of the gift shop/ news stand and food services, with the exception of value for money (generally stable in the gift shop/ news stand and food services this year).

Satisfaction with Sailing Schedules

- Having strengthened on many aspects of the sailing schedules in 2009, ratings remain stable across all aspects measured in 2010 including *departing on time*. But note that scores have improved slightly with respect to *latest ferry late enough*.

Satisfaction with Safety

- Perceptions of the *safety of the ferry operations* continue to be strong.

Satisfaction with Overall Value

- Ratings of *value for money of fares* in 2010 remain stable having rebounded last year from the decline seen in 2007 and 2008. This year the average rating is 3.12 on the 5-point scale compared with 3.16 in 2009 and 2.91 in 2008.

Key Conclusions

Following an improvement in satisfaction levels overall in 2009, as well as on a number of specific attributes and services at the terminal and onboard, results in 2010 remain largely stable, with some continuing, gradual upward trends. The key areas of success in 2010 have been in the following areas:

- Staff at the terminal and onboard
- The web site and specifically on-line reservations
- All aspects of the ticket purchase
- Availability and cleanliness of terminal and onboard washrooms
- Cleanliness of pre-boarding and onboard lounge seating
- Appearance of terminals
- Variety/selection in onboard gift shop/ news stand
- Availability and cleanliness of seating area of onboard food/beverage services
- Availability of tourist and travel info
- Onboard atmosphere and environment
- Outside decks
- Procedures for loading and unloading
- Safety of ferry operations and loading/unloading

Areas of opportunity to enhance the customer experience continue to include:

- Ease of using automated phone system
- Value for money of fares, parking, food/beverages, and retail merchandise both at the terminal and onboard
- Variety/selection at outdoor market
- Sailing frequency
- Latest ferry late enough (but slight improvement noted)
- Ability to connect
- Problem resolution

Detailed Findings

The following section shows the detailed findings from the study. It graphically displays the satisfaction scores for each of the 69 service attributes, showing both the average satisfaction score out of 5 as well as the percentage for each level of satisfaction, that is, 'Very Dissatisfied', 'Dissatisfied', 'Neither Satisfied/Dissatisfied', 'Satisfied' and 'Very Satisfied'. The ratings are shown for all surveyed BC Ferry routes combined and, where appropriate, the route-by-route scores are shown as well.

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

Ferry Routes Included in Customer Satisfaction Survey - 2010	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay–Descanso Bay, Gabriola Island
Route 21	Denman-Buckley Bay
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

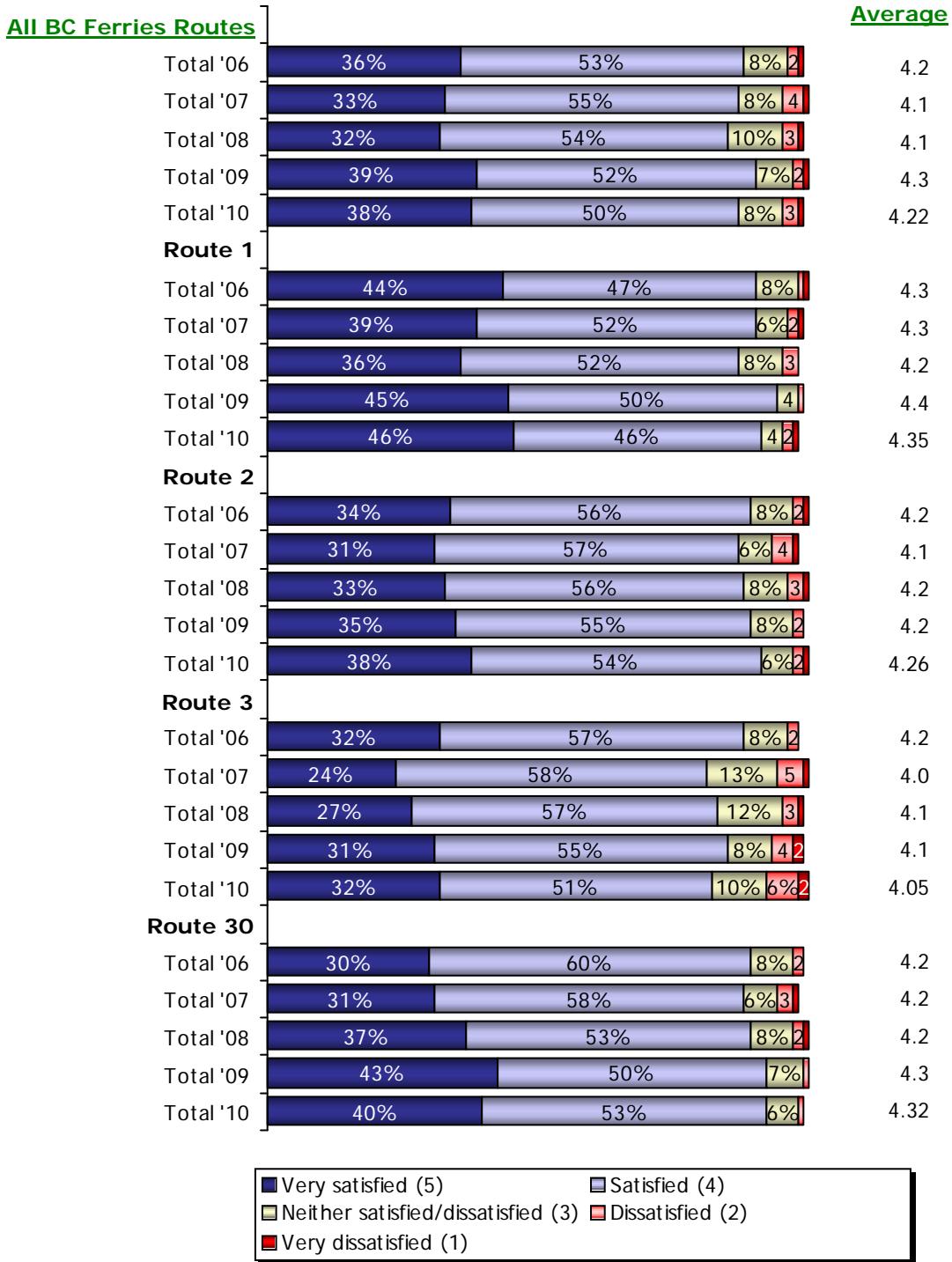
Overall Satisfaction with BC Ferries

A total of 89% of passengers in 2010 reported to be satisfied overall with their experience travelling on BC Ferries, a marginal decrease from 91% in 2009. An overall score of 4.22 has been achieved (on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'), compared with 4.26 achieved in 2009, but still higher than most previous measures.

While the overall satisfaction scores have fallen slightly, there have been no significant shifts by individual route.

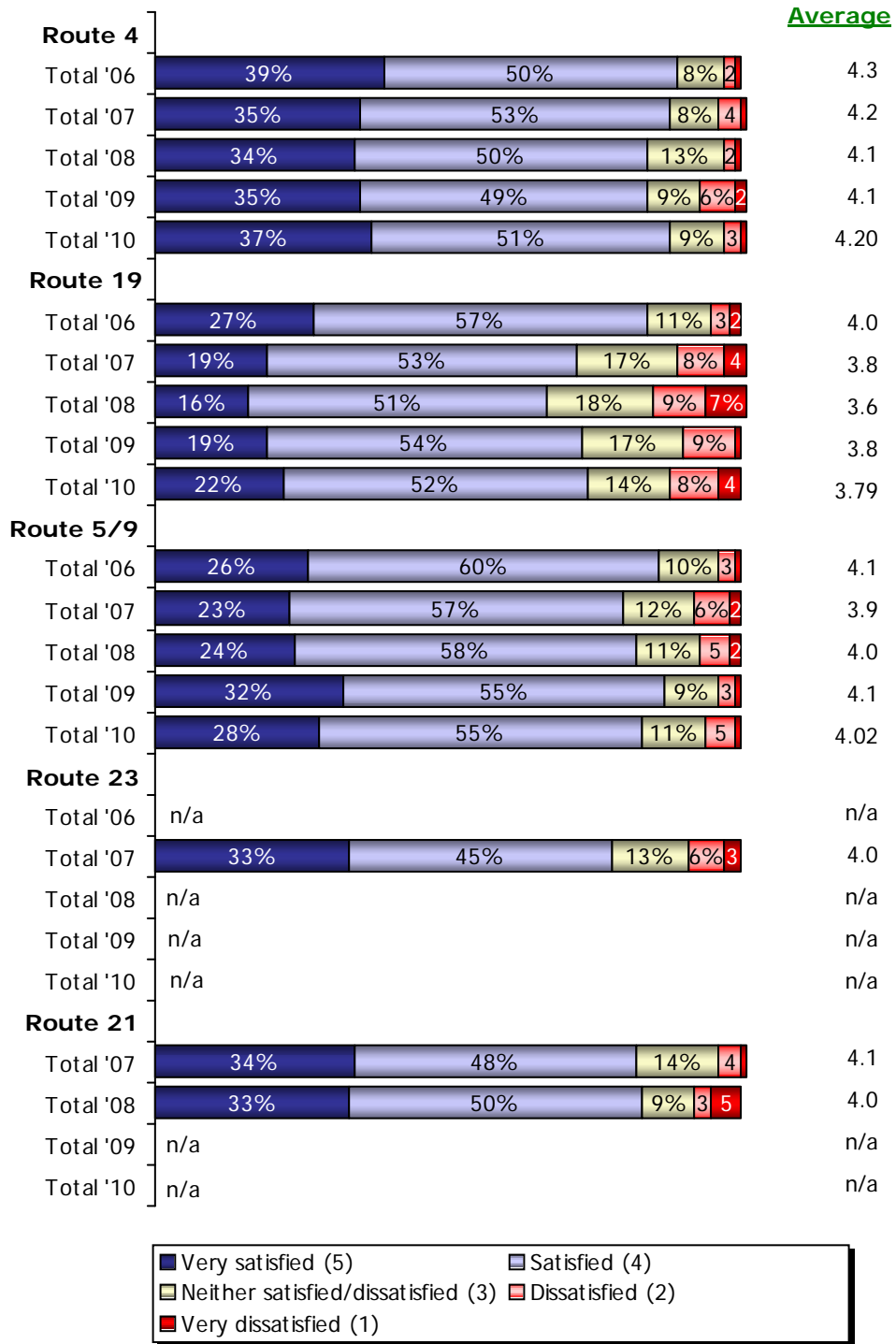
[NOTE: Refer to page 5 for route number codes]

Overall Satisfaction Level with Recent Experience Travelling with BC Ferries



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

Overall Satisfaction Level with Recent Experience Travelling with BC Ferries (cont'd)

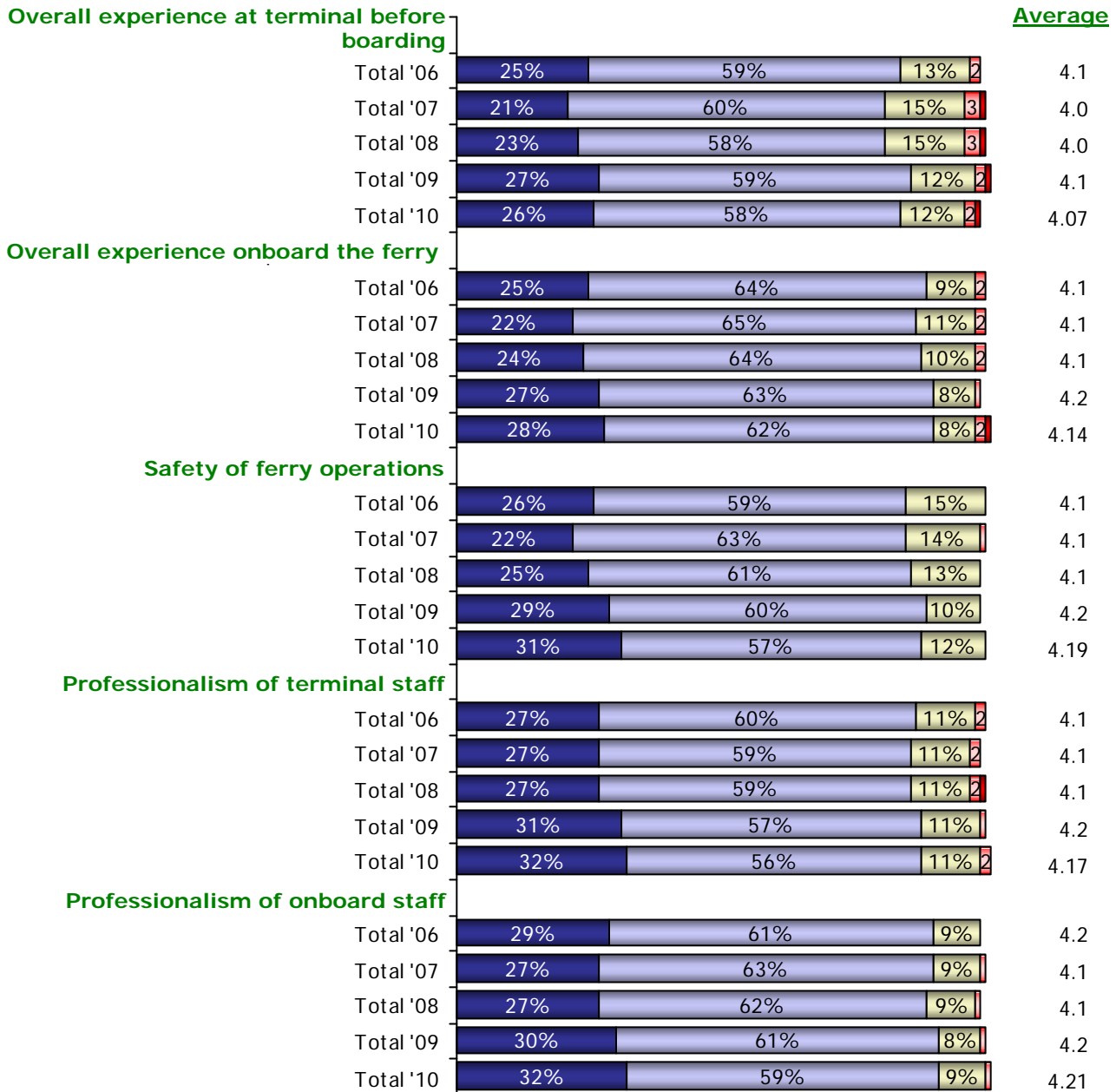


Q.1) How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?

Note: Route 23 not surveyed in 2006, 2008, 2009 and 2010; Route 21 not surveyed in 2009 and 2010.

The following chart summarizes the results from overall measures of each main point of contact and specifically with BC Ferries staff. Performance ratings have been stable on these key measures.

Summary of Main Satisfaction Scores



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

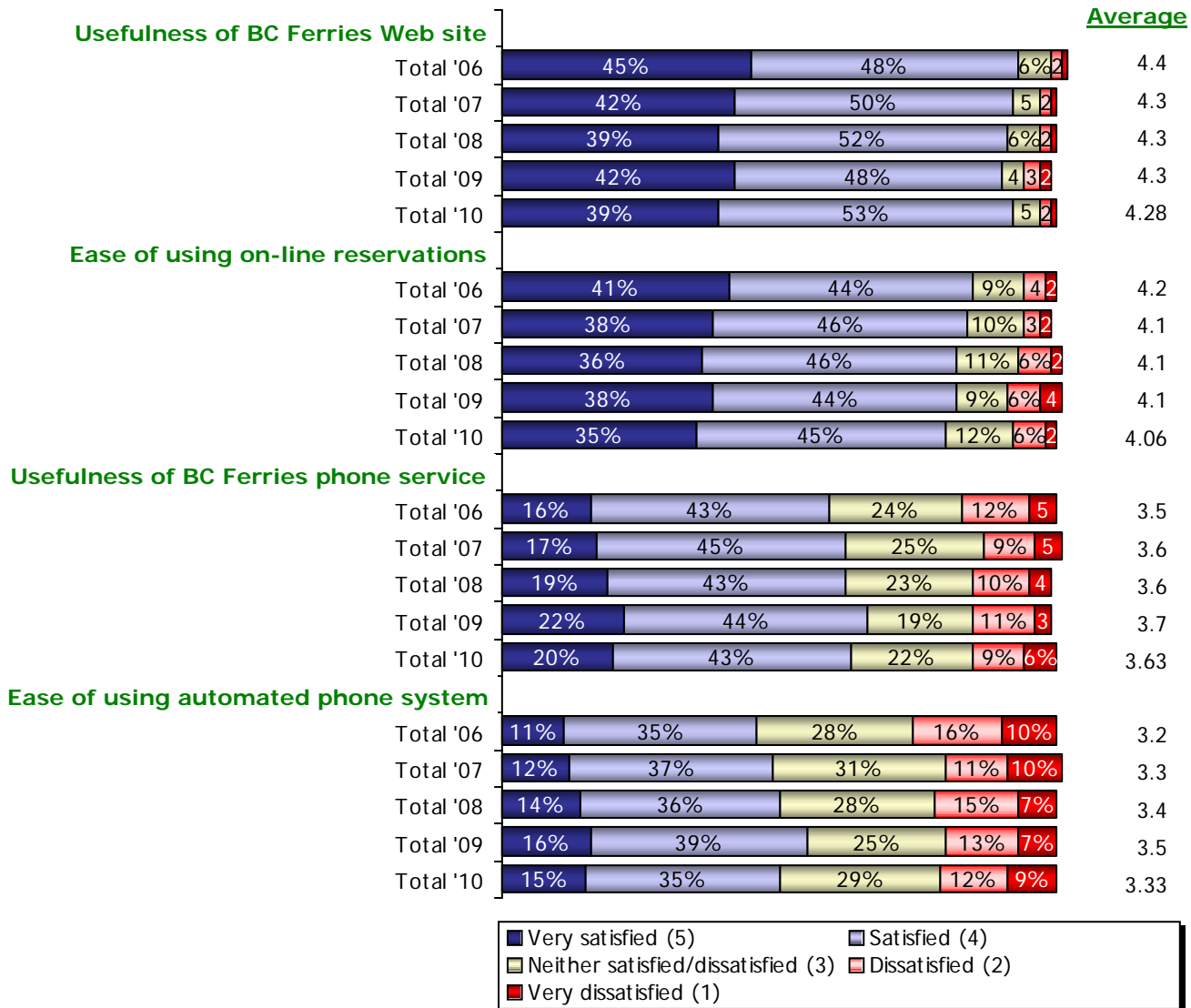


Before Arriving at Terminal

Web site and Phone Contact

Ratings continue to be stable with respect to the *usefulness of BC Ferries web site* and to the *ease of making on-line reservations*. After making slight gains in 2009 with respect to the *usefulness of BC Ferries phone service* and *ease of using the automated system*, ratings have returned to 2008 levels.

Satisfaction with Aspects of Web site* and Phone Contact**



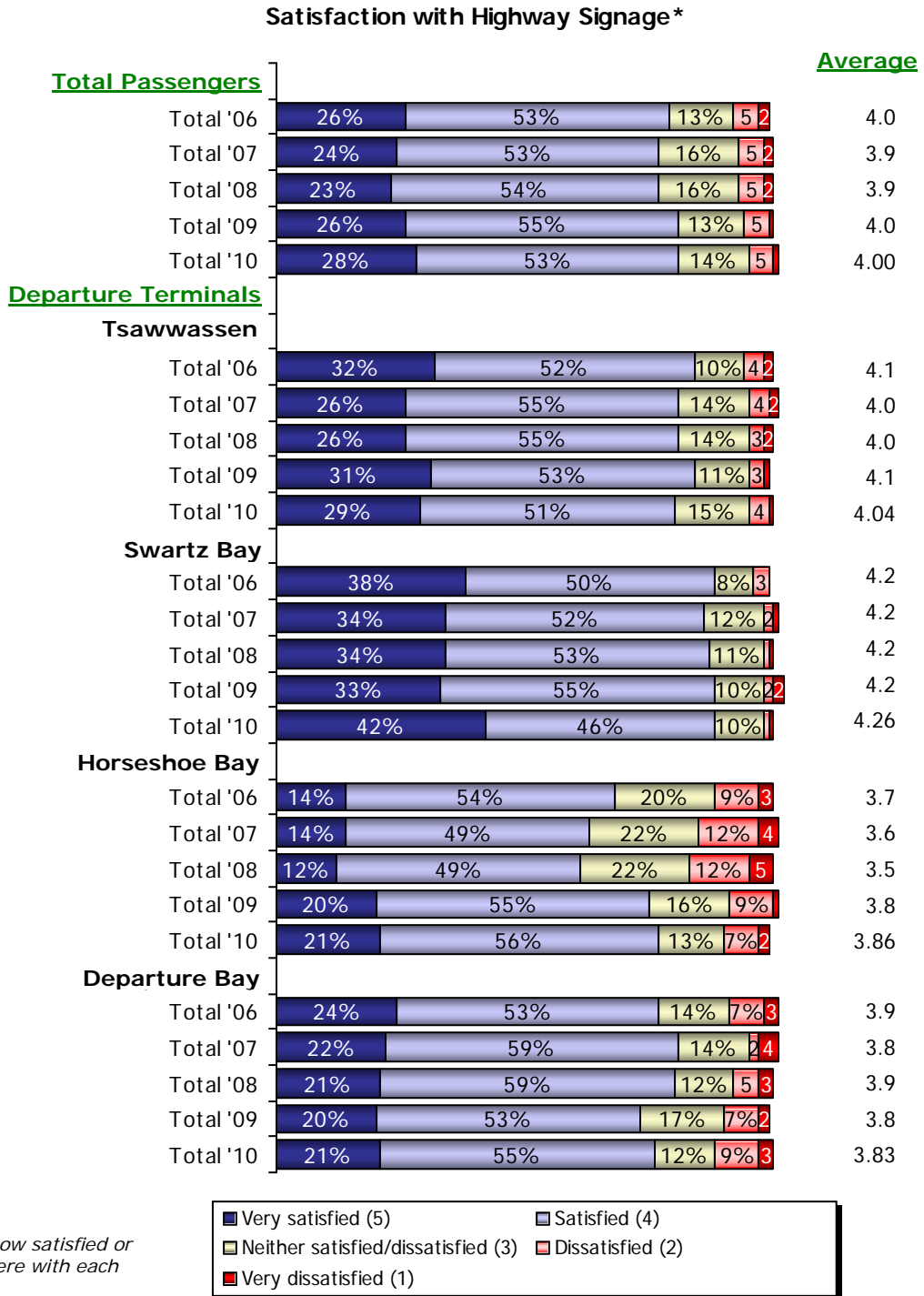
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* 72% usage web site, 80% for on-line reservations

** 25% usage phone service, 20% for automated system

Highway Signage

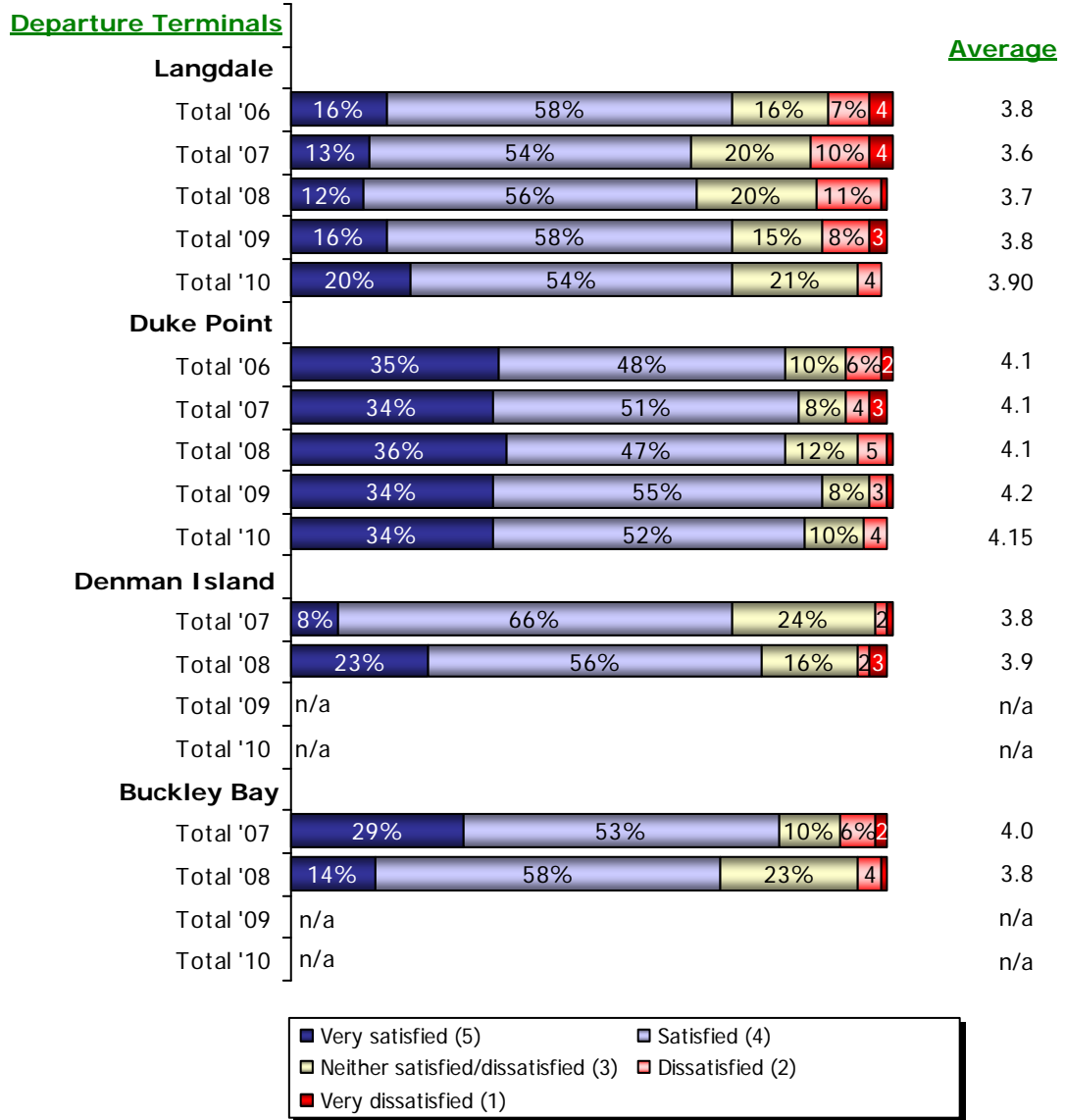
Satisfaction levels with highway signage have stabilized overall but show some improvement at Swartz Bay.



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

* Usage: 76%

Satisfaction with Highway Signage*
(cont'd)



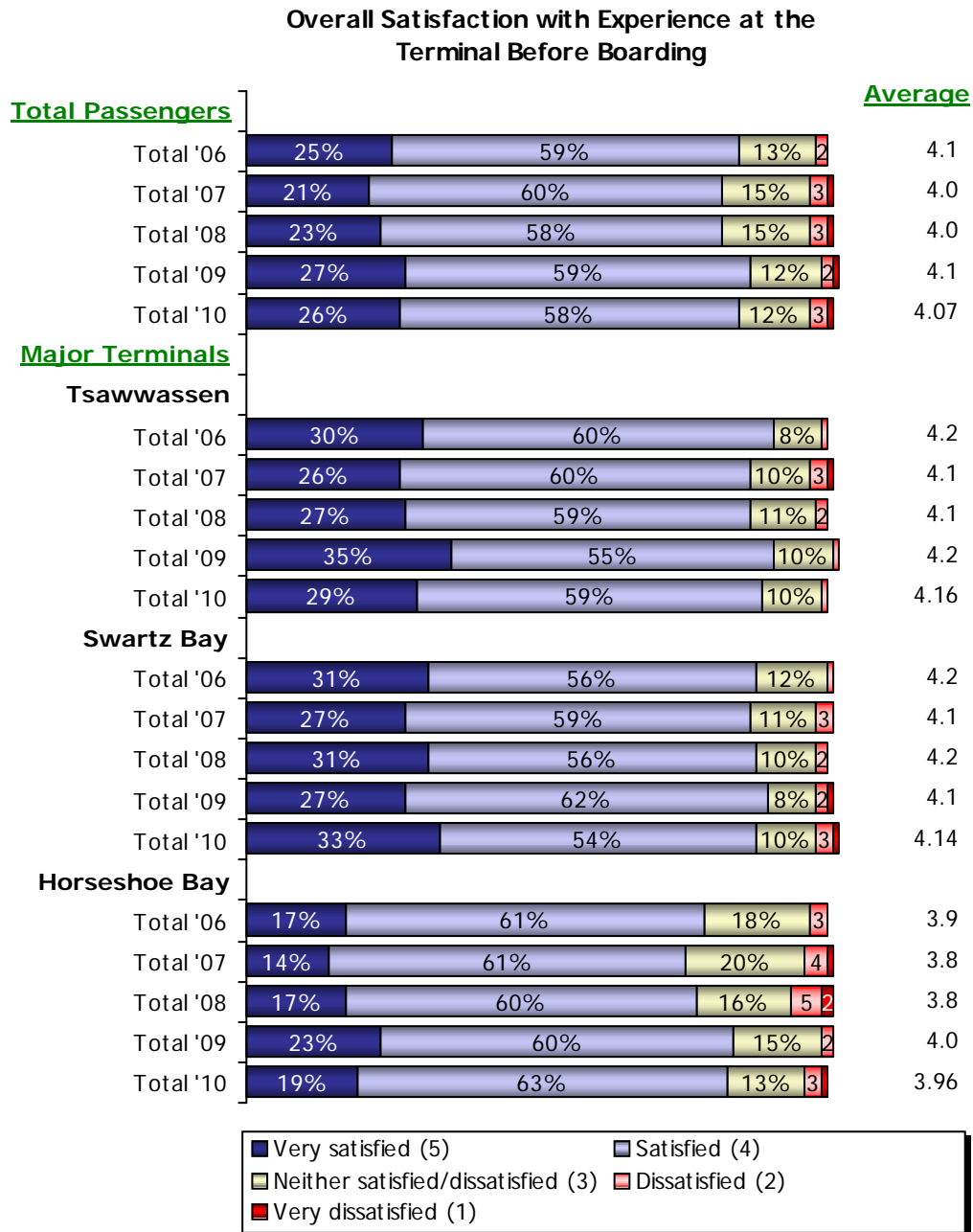
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* Usage: 76%

At the Terminal

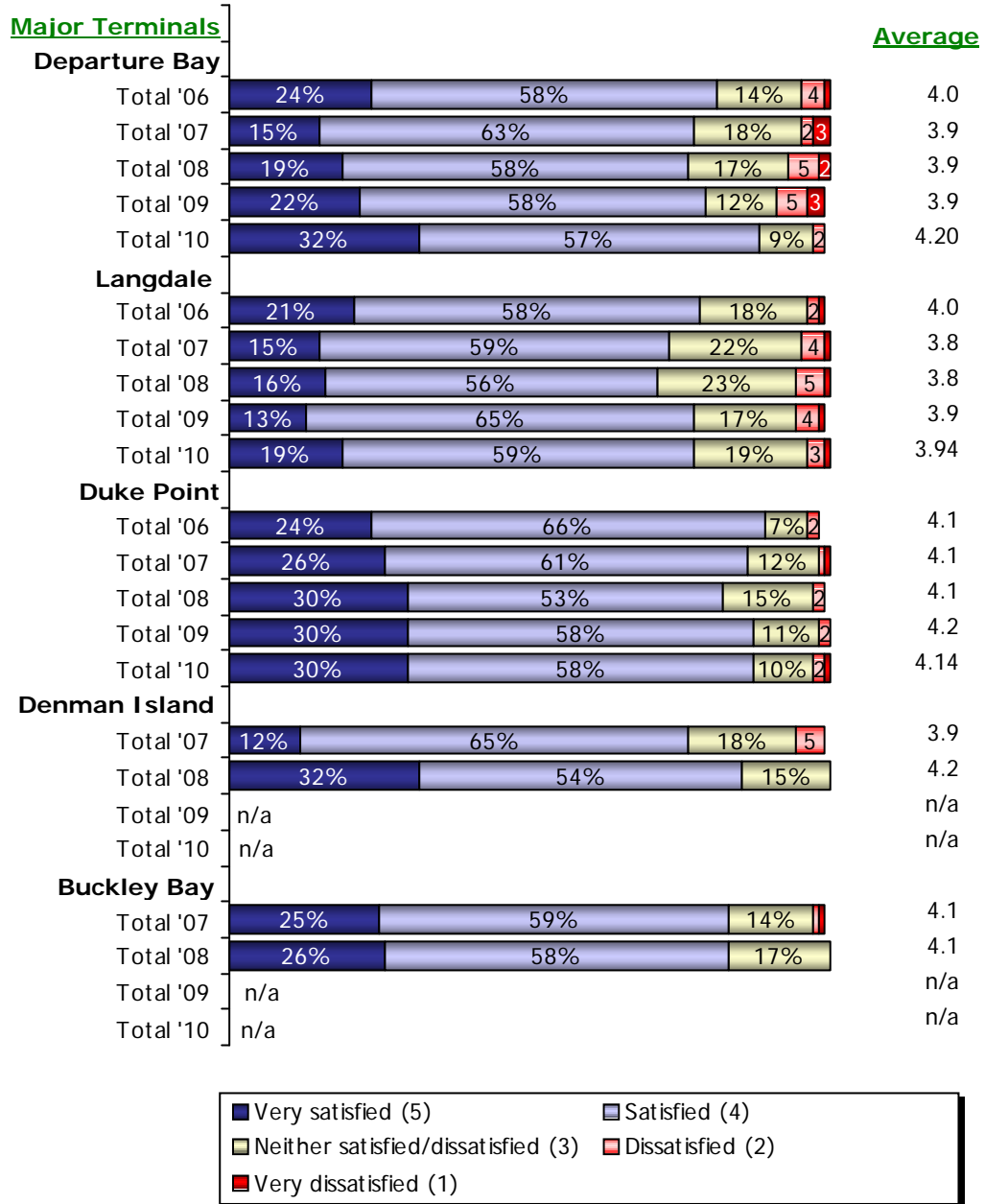
Overall Experience at the Terminal

Overall satisfaction with the experience at the terminal before boarding is consistent with a year ago (85% versus 86% a year ago). Satisfaction is consistent at most terminals with the only notable difference in ratings amongst passengers at Departure Bay (average increasing from 3.9 in 2009 to 4.2 in 2010).



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

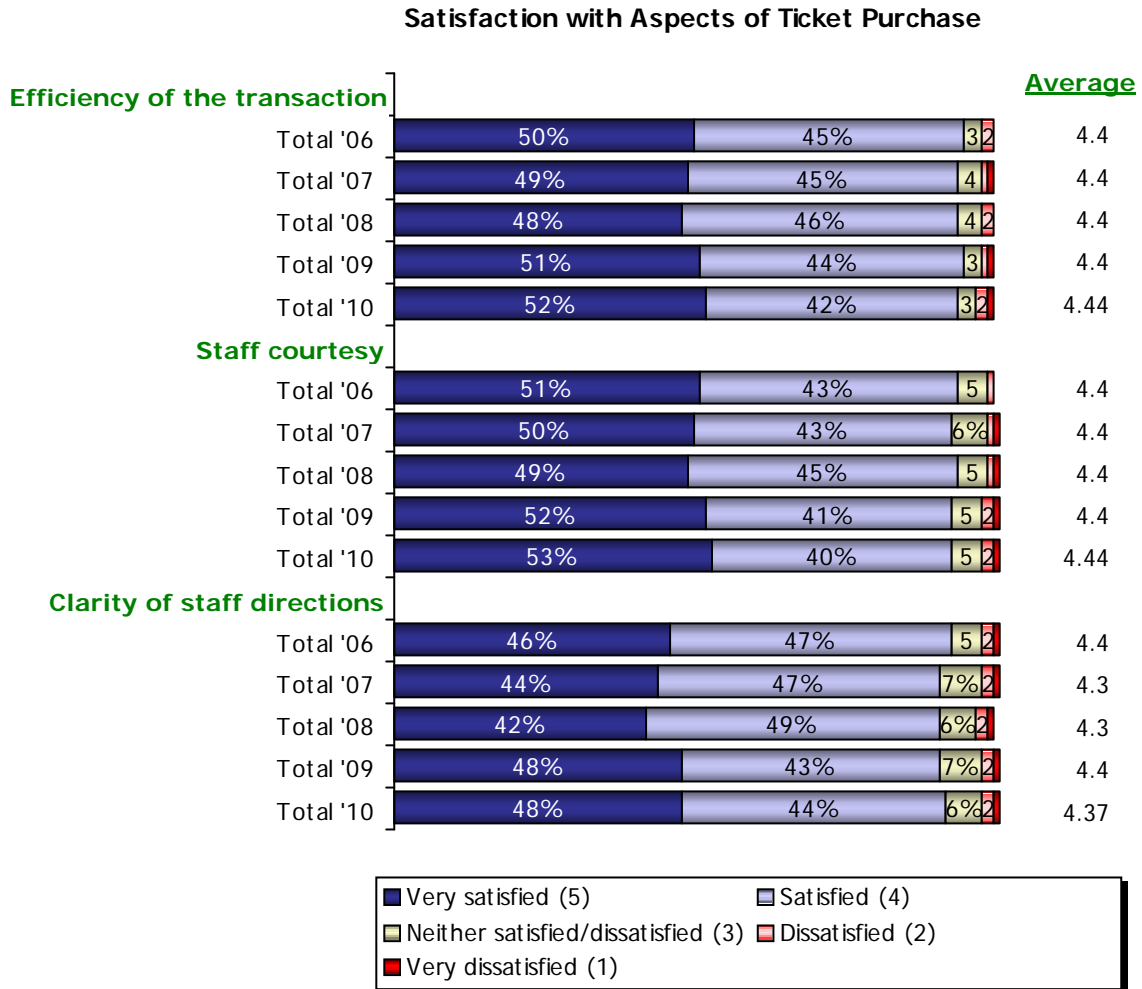
Overall Satisfaction with Experience at the Terminal Before Boarding (cont'd)



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

Ticket Purchase

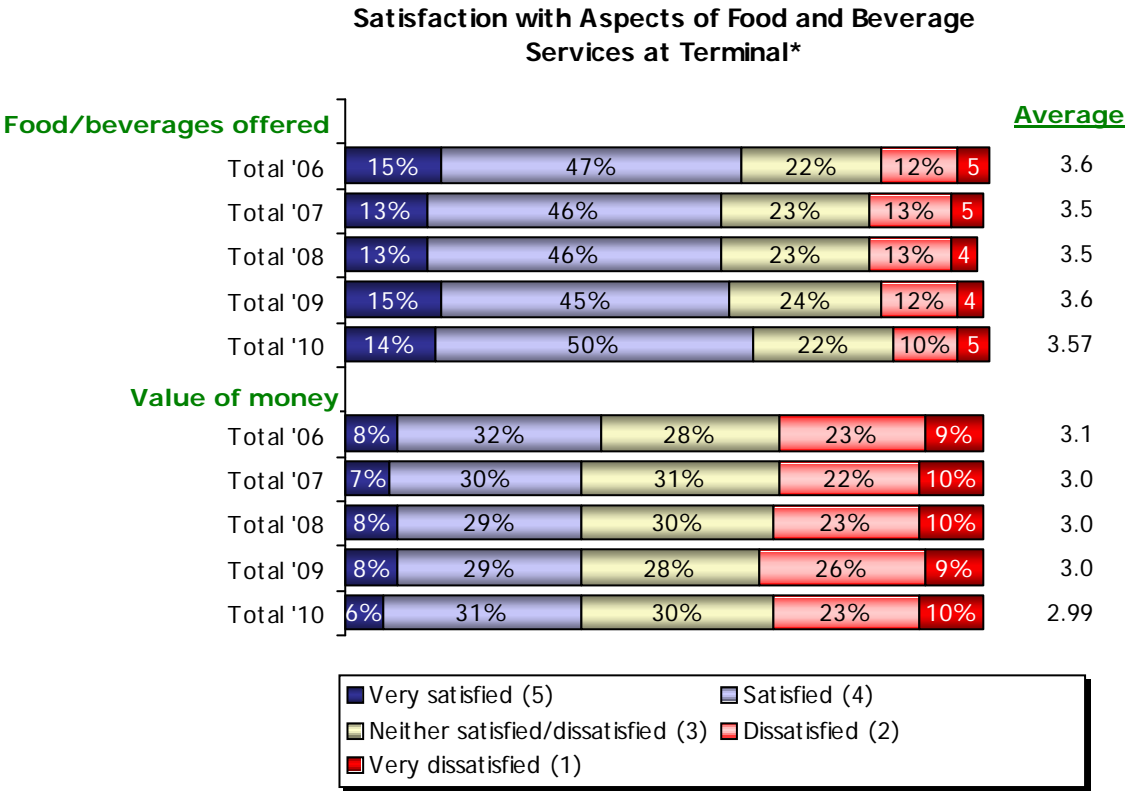
Satisfaction levels continue to be high with all aspects of the ticket purchase process with average ratings similar to a year ago.



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

Food/Beverage Services at Terminal

Satisfaction levels with food and beverage services at terminals are also relatively unchanged.



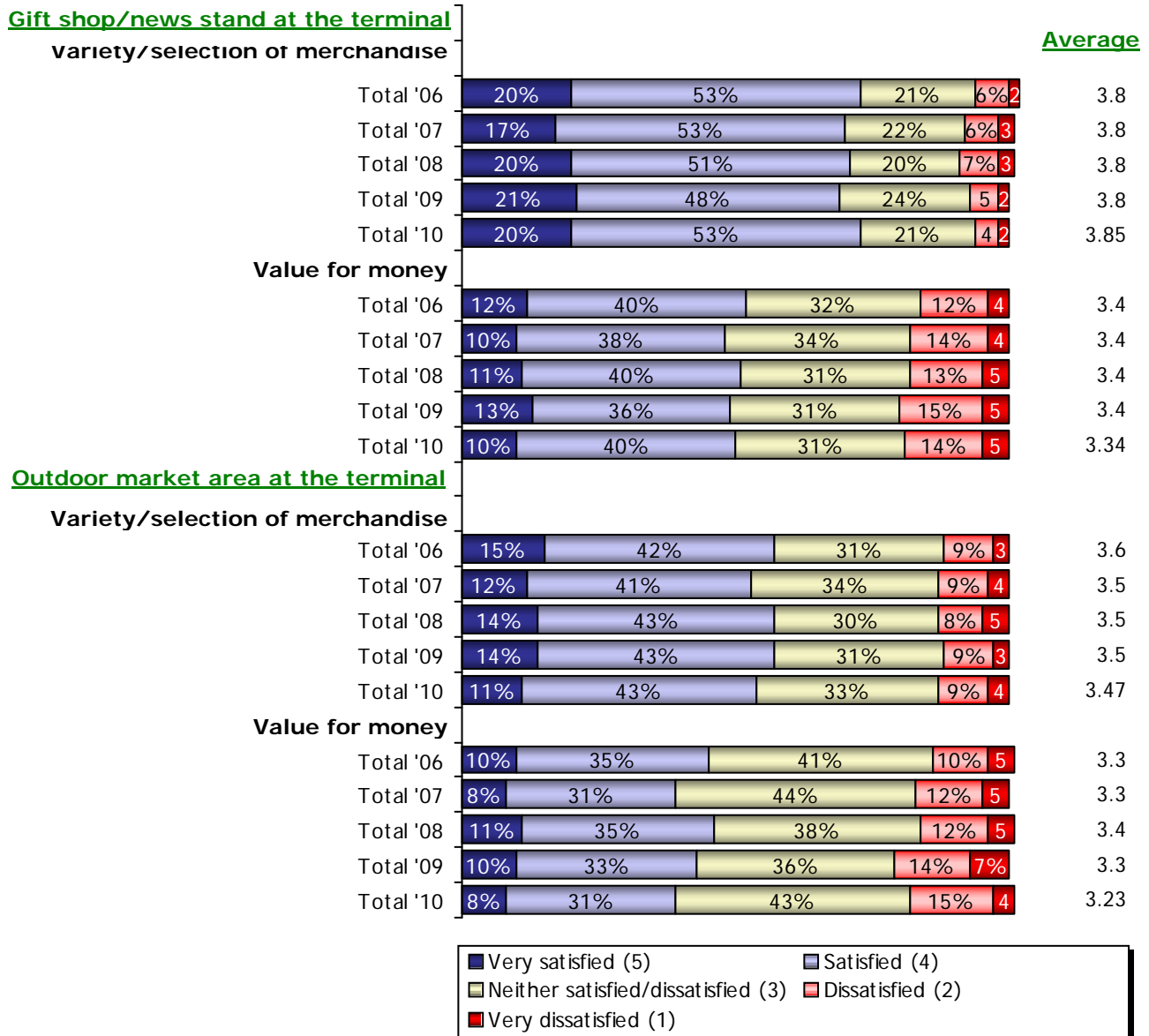
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

** 46% usage overall; excluding routes 19, 21 and 23.*

Retail Services at Terminal

Similarly, satisfaction ratings are not statistically different from 2009 with respect to the gift shop/news stand services and outdoor market area at the terminals, in terms of both *variety/selection* and *value for money*.

Satisfaction with Aspects of Retail Services at Terminal*



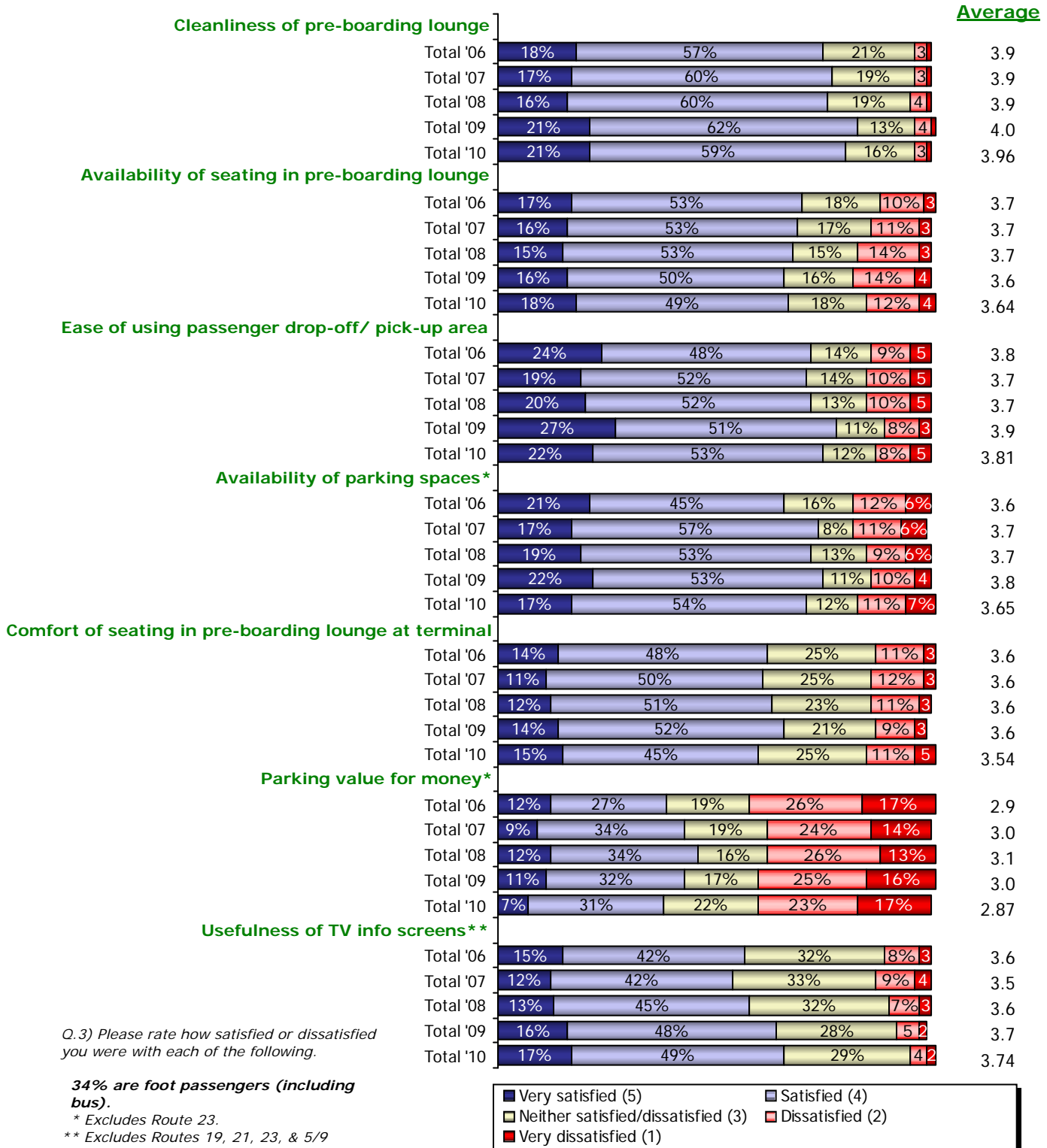
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

* 37% usage gift shop, 17% usage outdoor market; excludes route 19, 21 and route 23.

Foot Passenger Services

After making gains in several areas of foot passenger services, ratings have declined slightly with respect to *availability of parking spaces* as well as on *parking value for money*.

Satisfaction with Foot Passenger Services



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

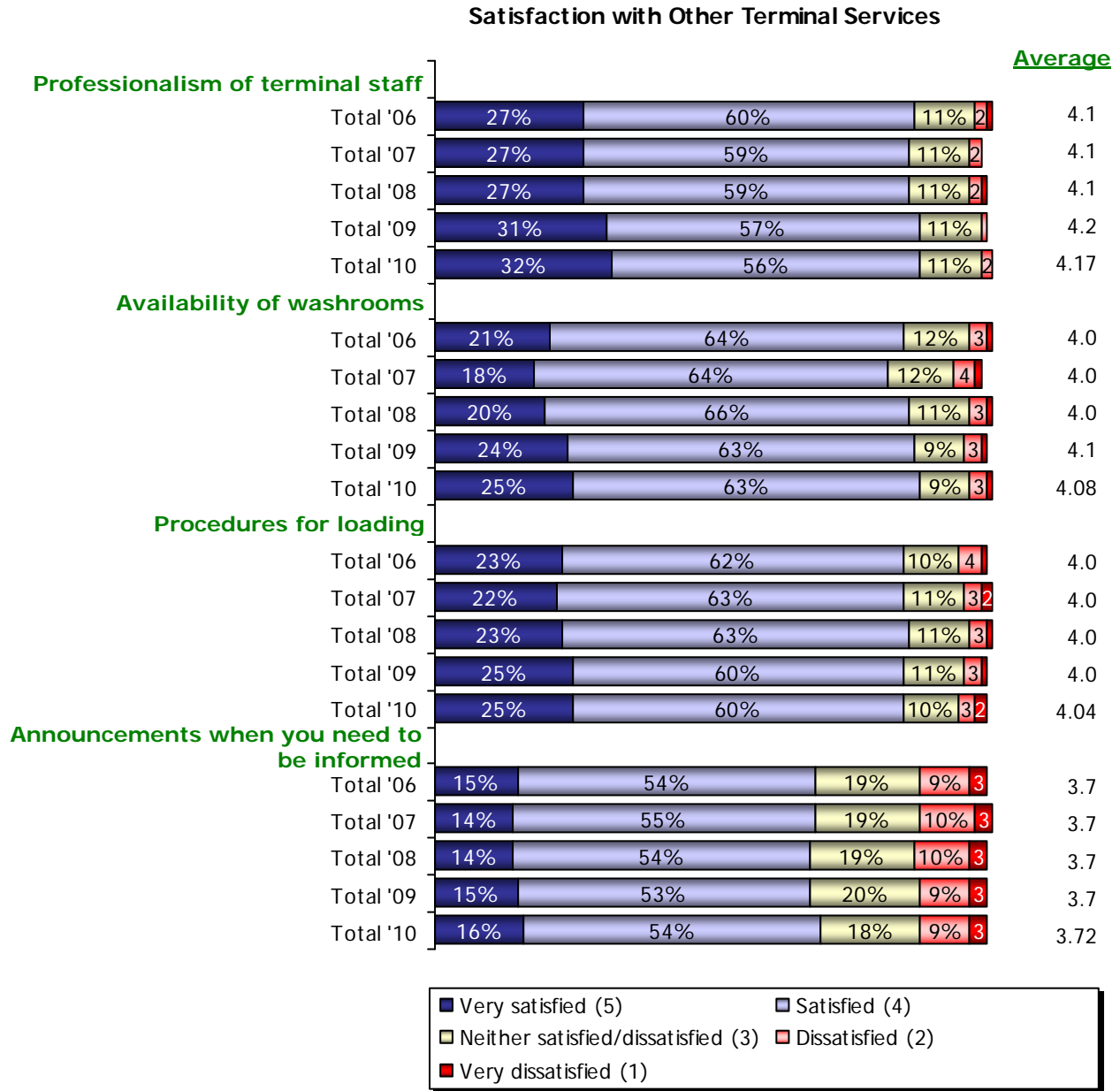
34% are foot passengers (including bus).

* Excludes Route 23.

** Excludes Routes 19, 21, 23, & 5/9

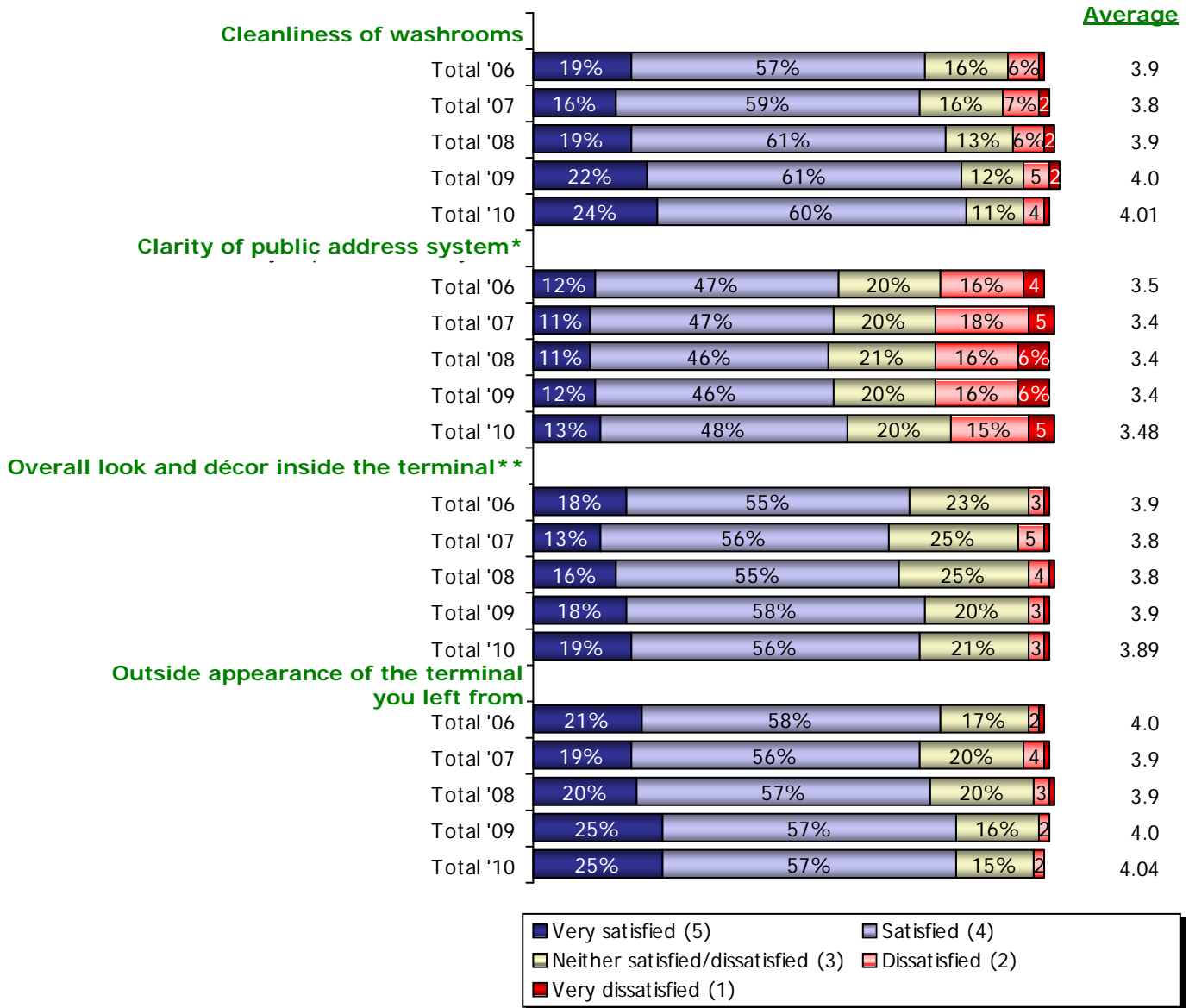
Other Terminal Services

Satisfaction levels have been stable on all other terminal services.



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

Satisfaction with Other Terminal Services (cont'd)



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

* Excludes Route 21 & 23.

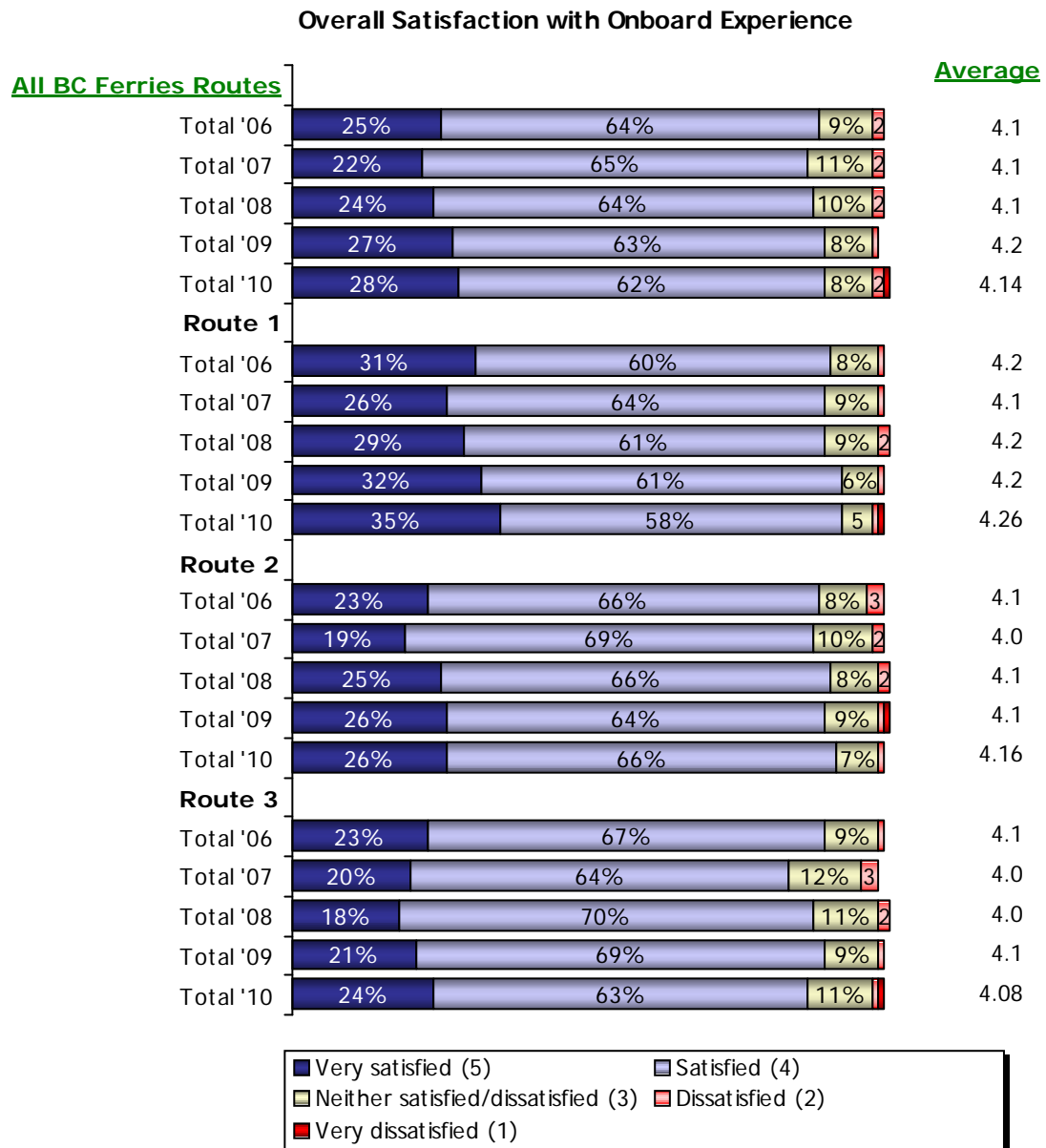
** Excludes Route 19, 21 & 23.

Onboard Experience

Overall Onboard Experience

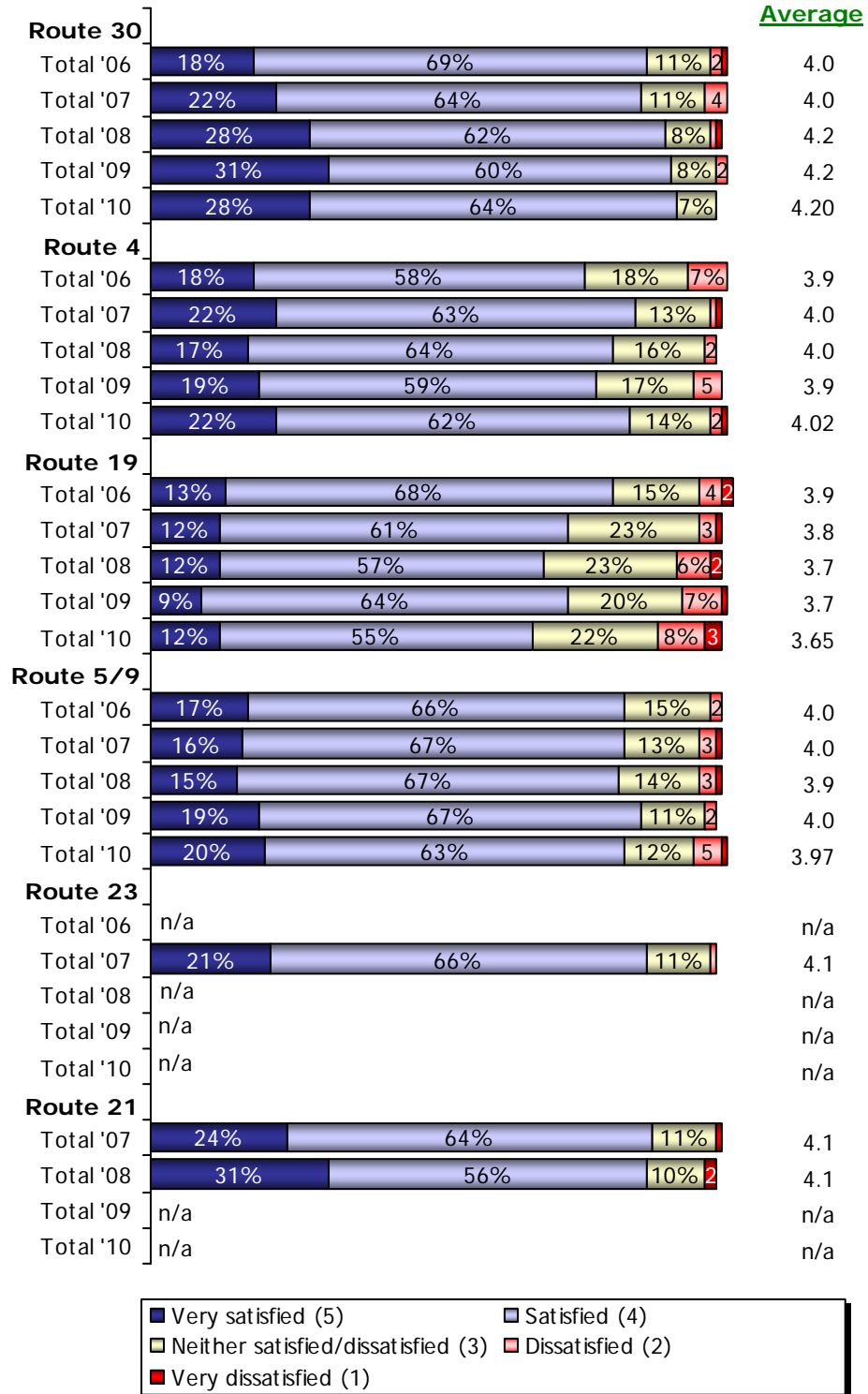
A total of 89% of passengers in 2010 were satisfied with their overall experience onboard, for an overall rating of 4.14 on the 5-point scale, consistent with the average score achieved in 2009 (4.15) which was the highest score achieved to-date. Most routes are consistent with a year ago with the exception of Route 4 which improved slightly.

[NOTE: Refer to page 5 or page 34 for Route number codes]



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

**Overall Satisfaction with Onboard Experience
(cont'd)**



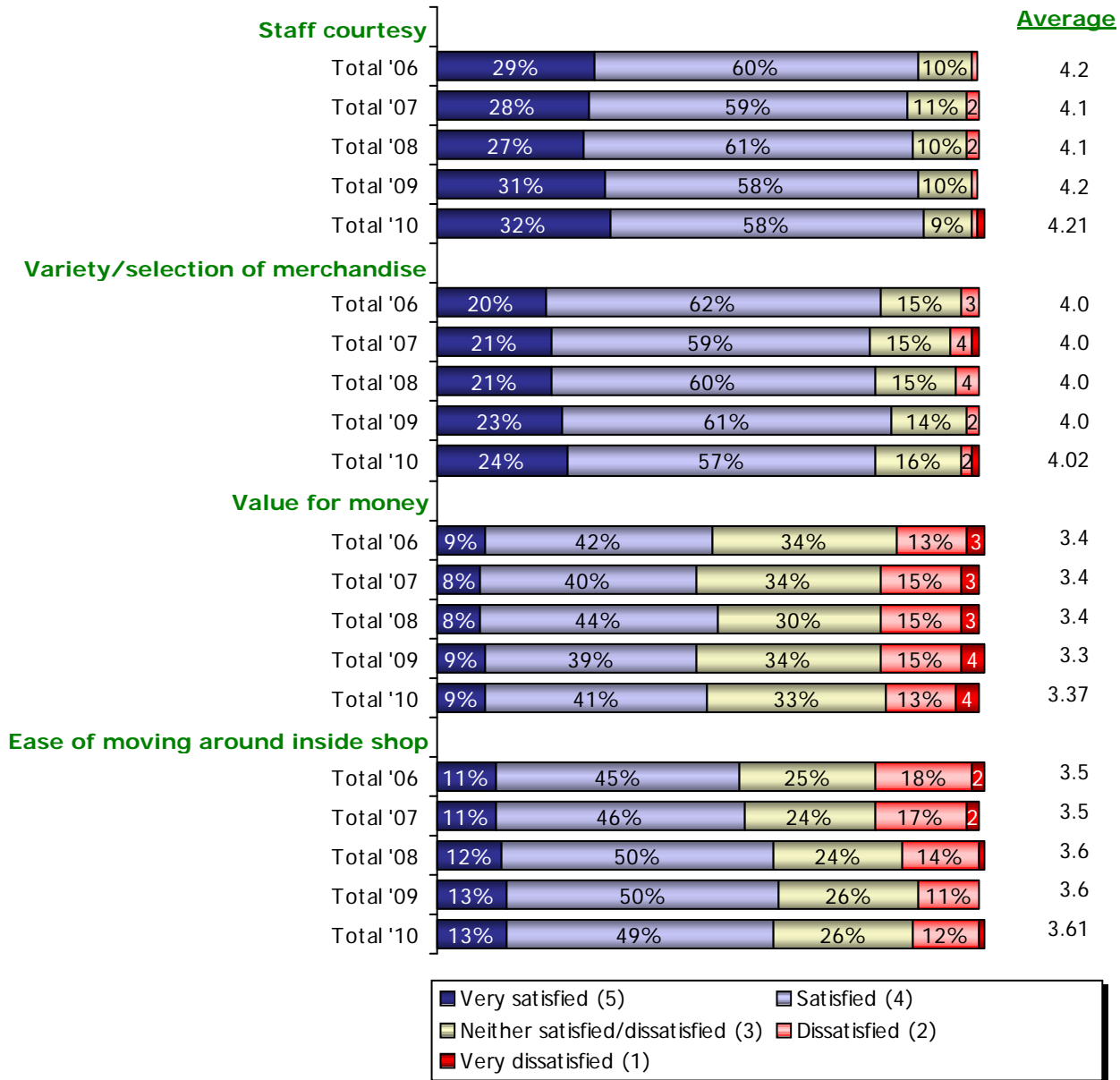
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Note: Route 23 not surveyed in 2006, 2008, 2009 and 2010.
Route 21 not surveyed in 2009 and 2010.

Onboard Gift Shop/News Stand

Satisfaction ratings have not varied from a year ago on different aspects of the onboard gift shop/news stand.

Satisfaction with Aspects of Gift Shop/News Stand Onboard*



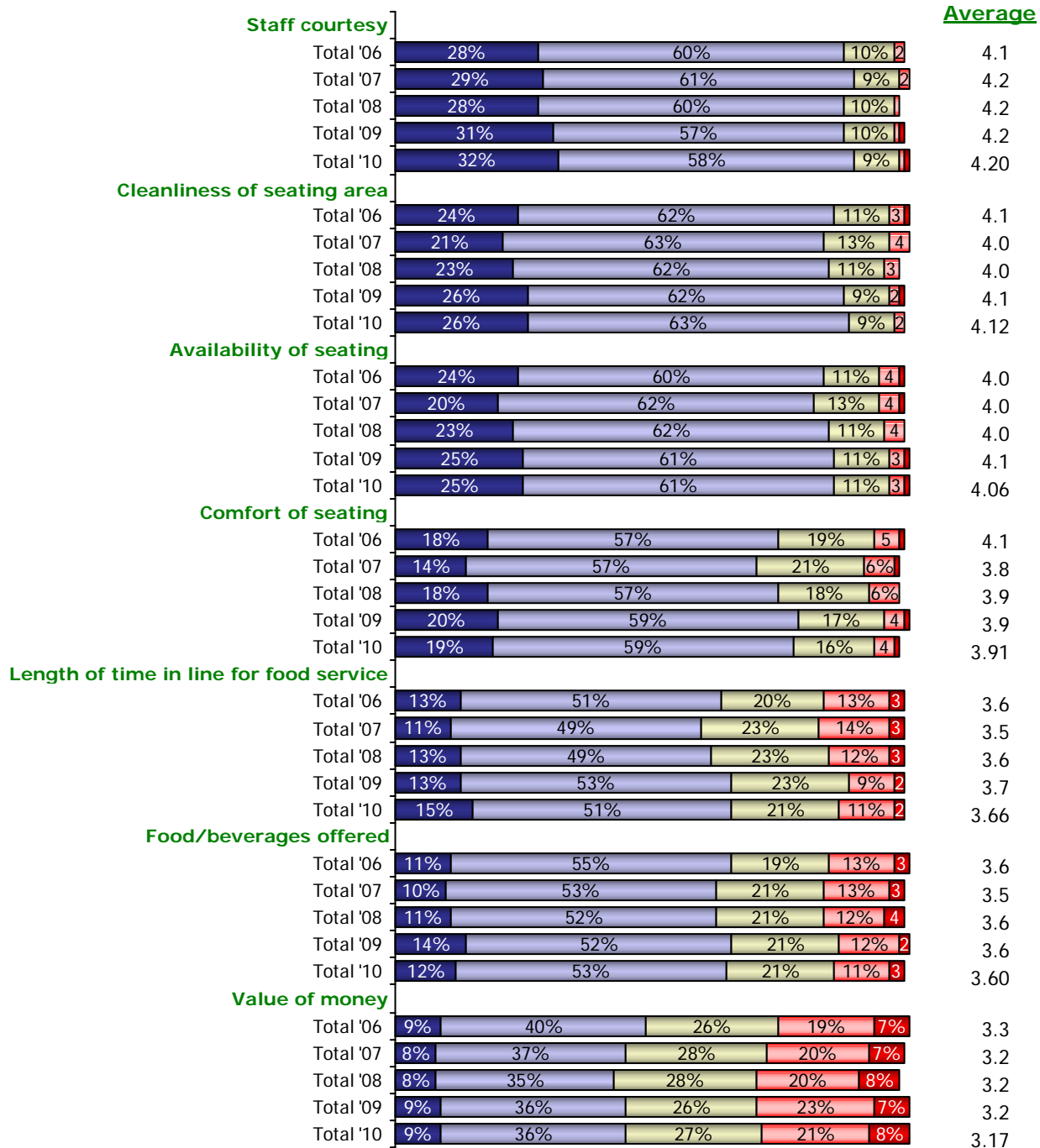
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

* 59% usage; .excludes Routes 4, 19, 21 and 23.

Onboard Food Services

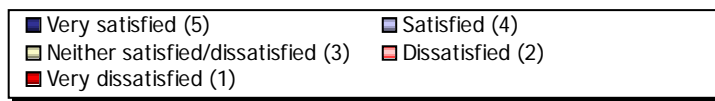
Satisfaction levels with all aspects of onboard food services also have been stable.

Satisfaction with Aspects of Food and Beverage Services Onboard*



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

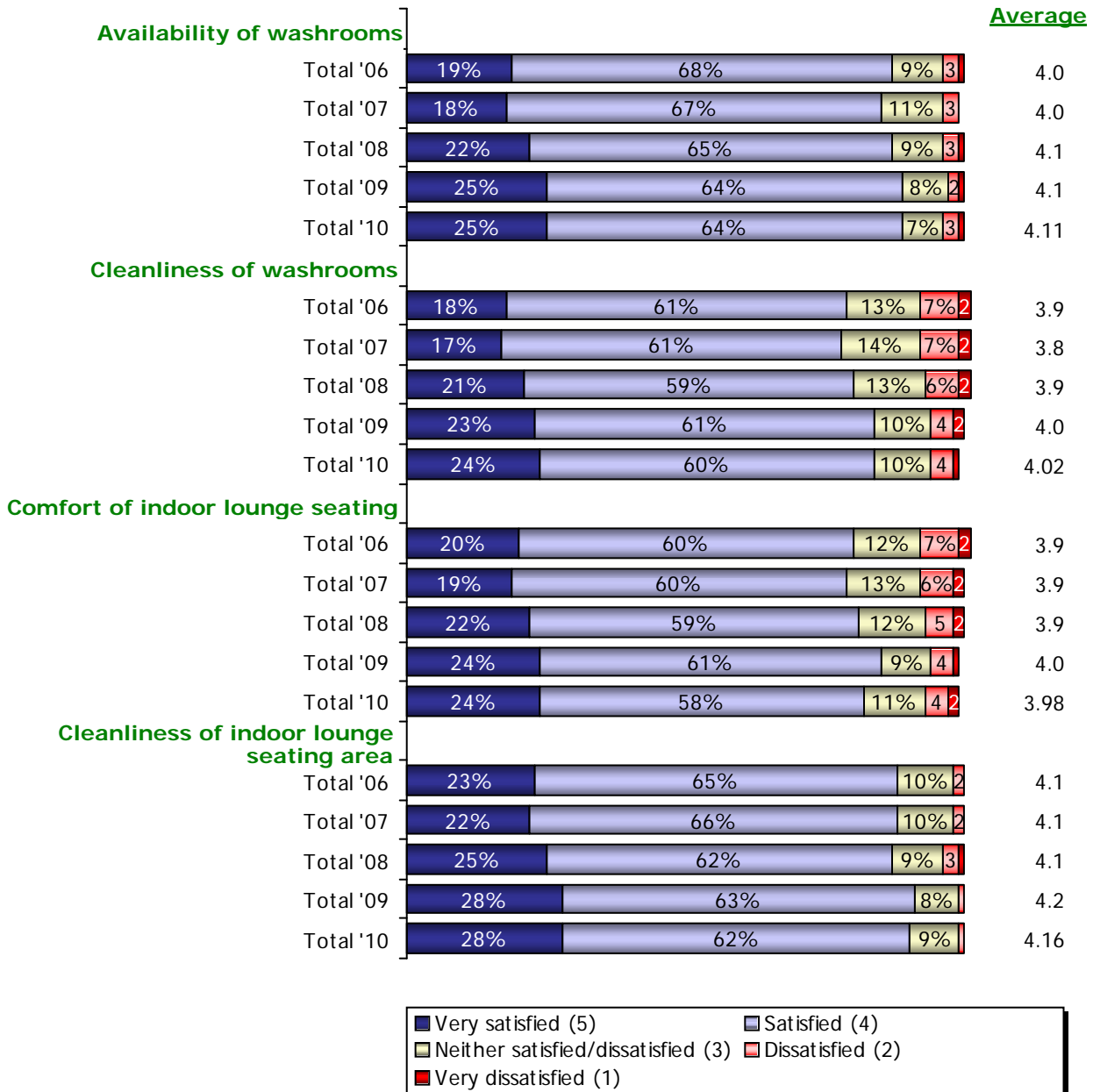
* Usage 74%; excludes Routes 4, 19, 21 and 23.



Onboard Washrooms and Onboard Seating

Ratings for *onboard washrooms* and *onboard seating* have been stable.

Satisfaction with Onboard Washrooms and Onboard Seating

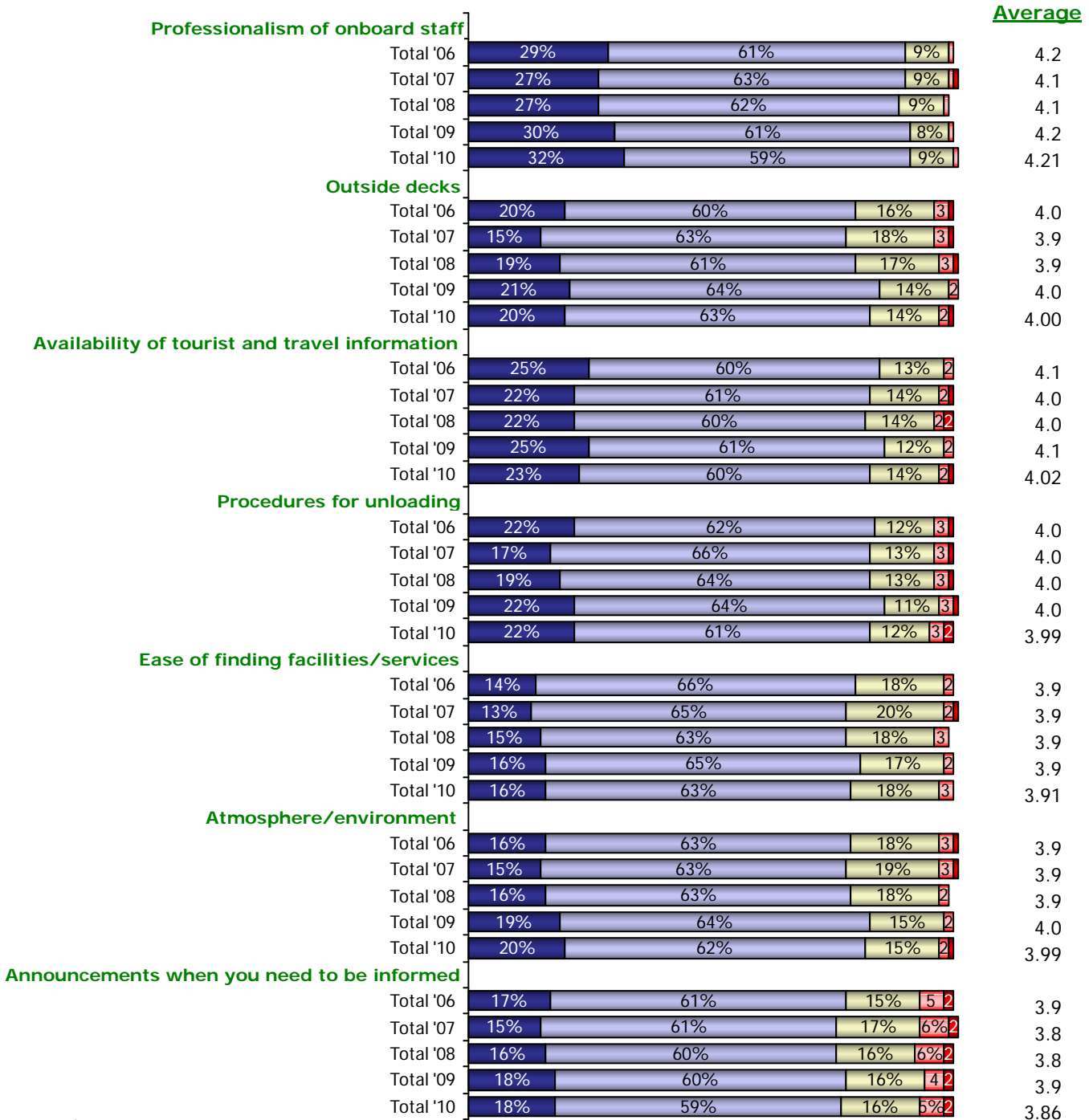


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

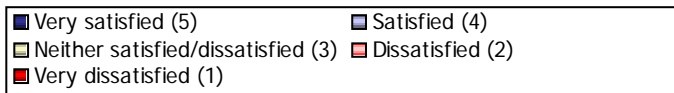
Other Onboard Facilities/Services

Furthermore, there are no significant changes to report with respect to other onboard facilities and services.

Satisfaction with Other Facilities/Services Onboard

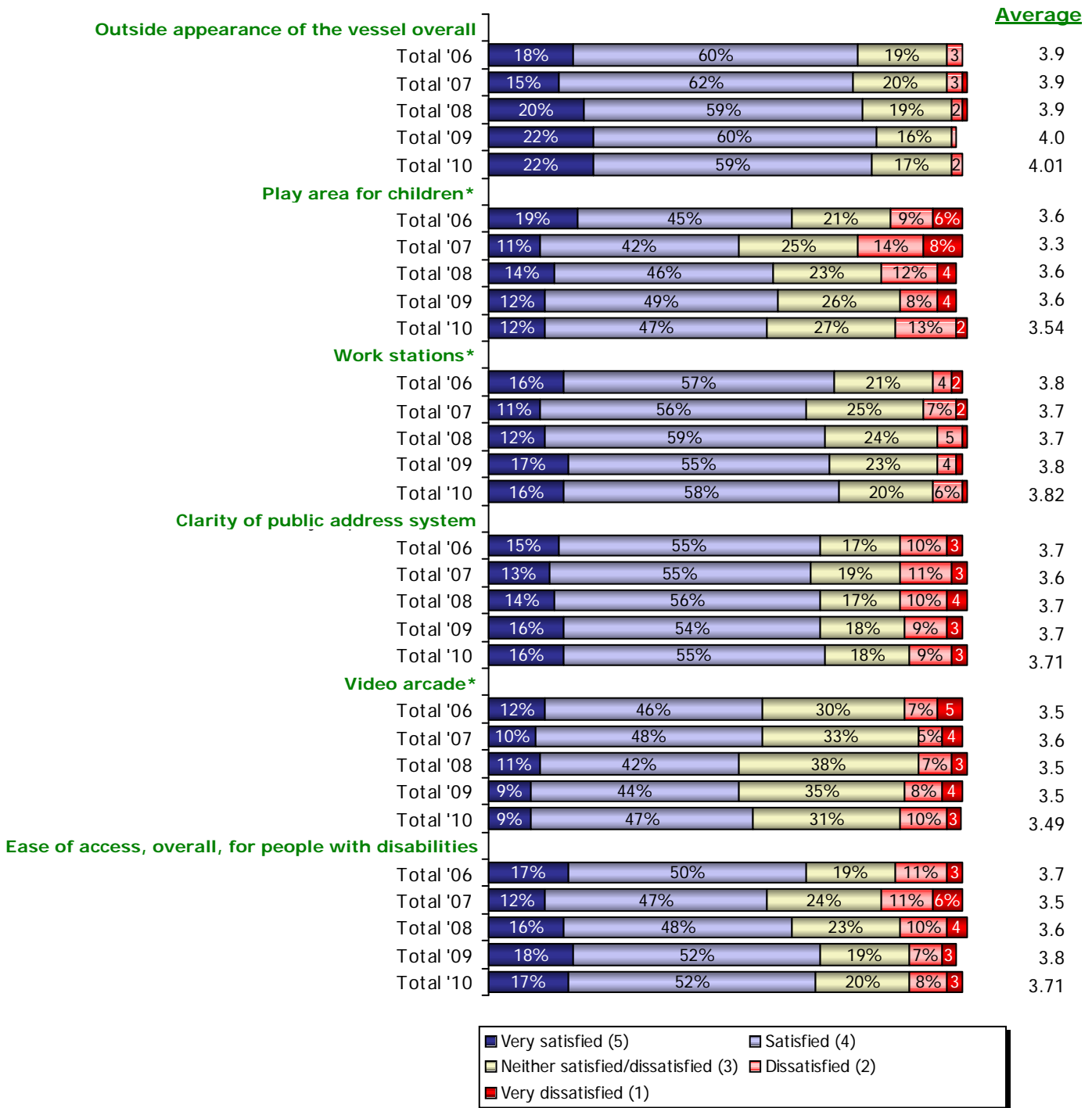


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.



Other Onboard Facilities/Services (cont'd)

Satisfaction with Other Facilities/Services Onboard (cont'd)



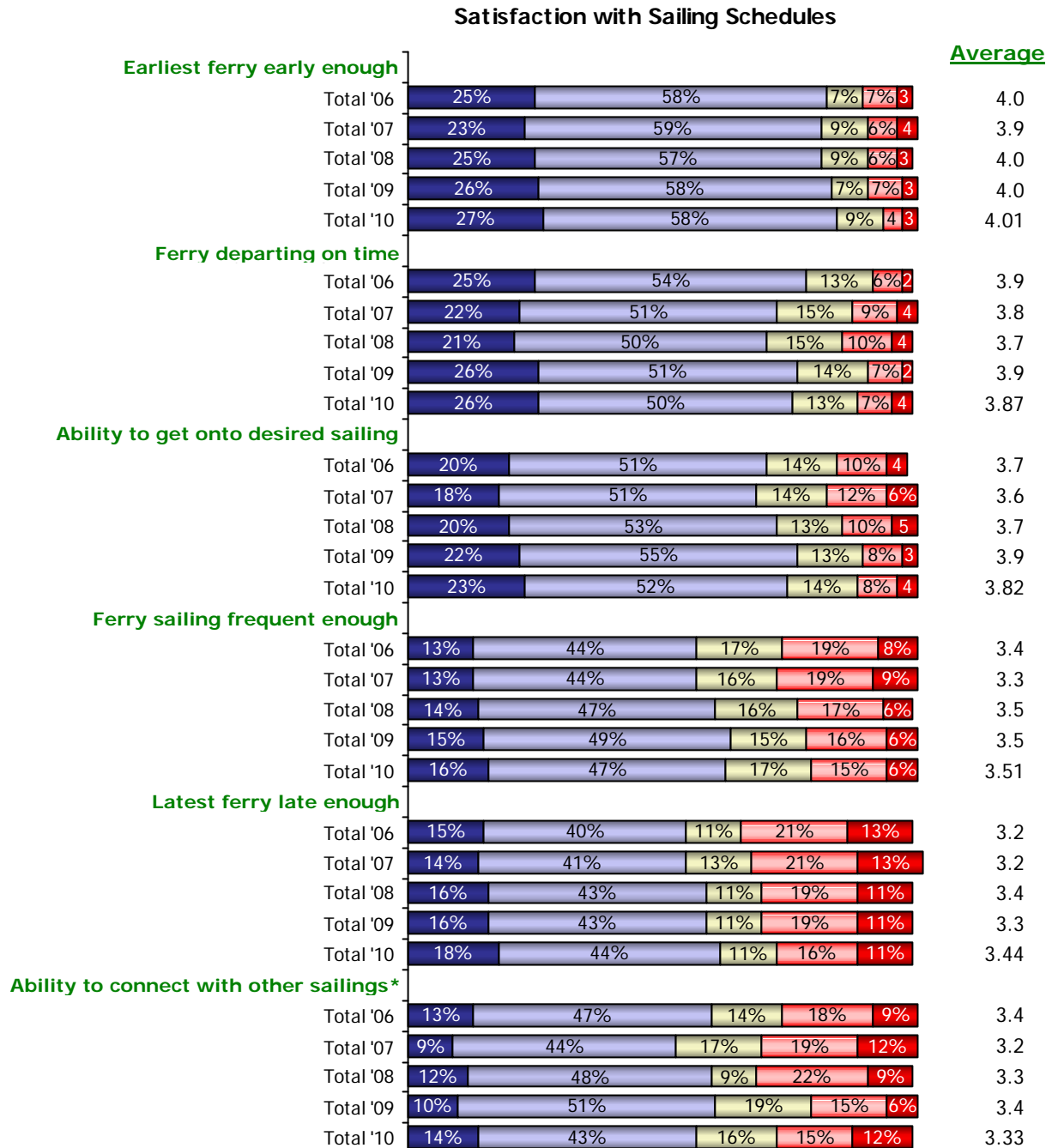
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

* Excludes routes 4, 19, 21 and 23.

Sailing Schedules

Various Aspects of Sailing Schedules

Having strengthened on many aspects of the sailing schedules in 2009, ratings remain stable across all aspects measured in 2010 including *departing on time*. But note that scores have improved slightly with respect to *latest ferry late enough*.



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

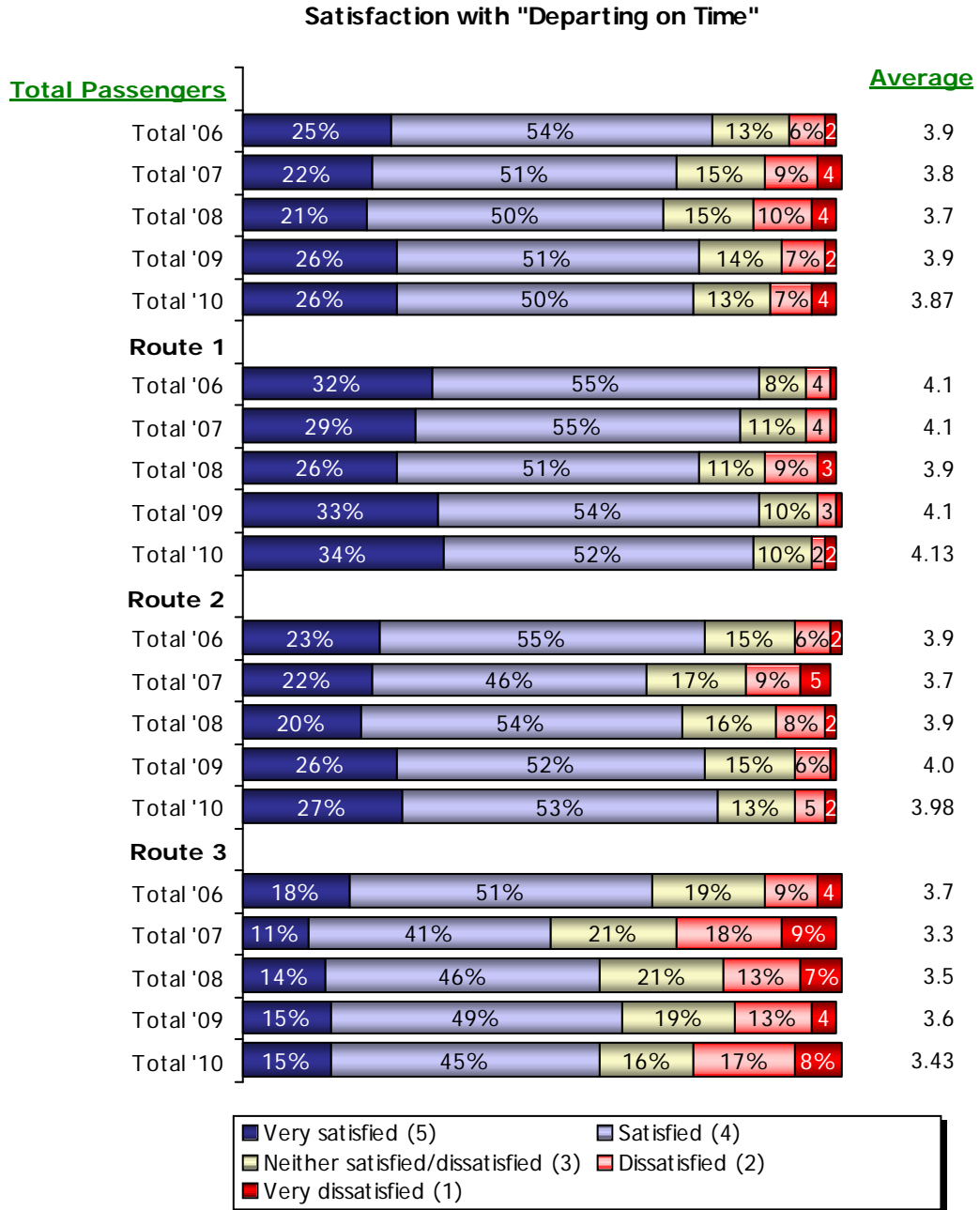
* Based on those connecting (n=474).



Departing on Time

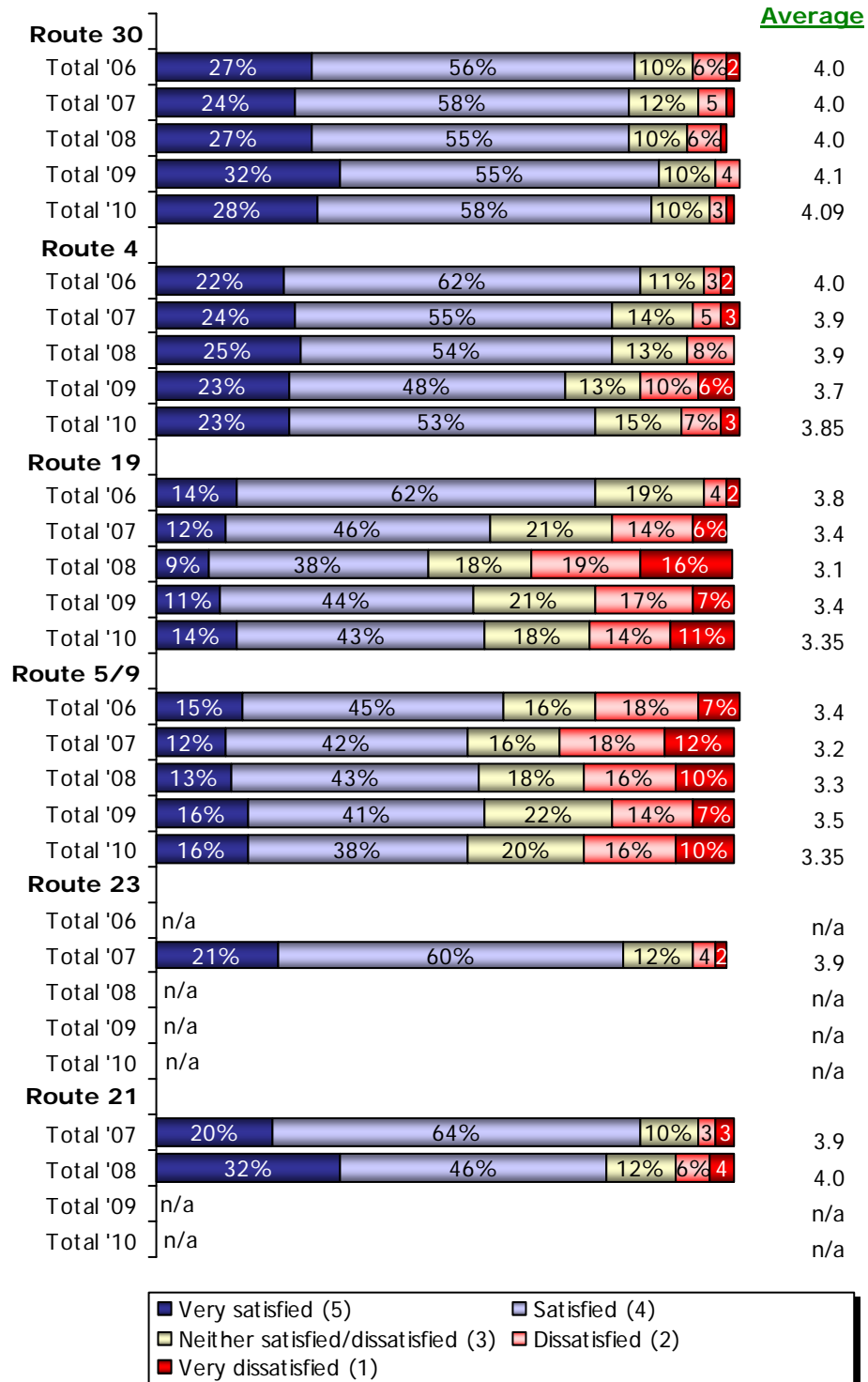
The following graph details the ratings for “departing on time” by route, with no significant changes to report.

[NOTE: Refer to page 5 or page 34 for Route number codes]



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

Satisfaction with "Departing on Time"
(cont'd)



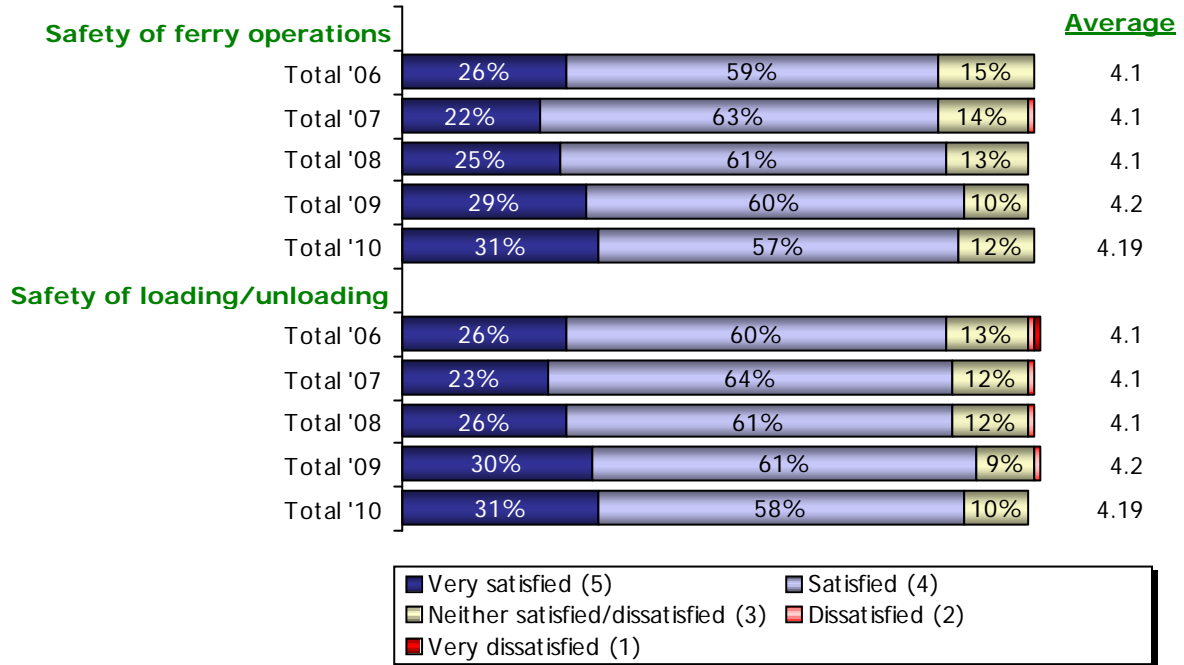
Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Note: Route 23 not surveyed in 2006, 2008, 2009 and 2010.
Route 21 not surveyed in 2009 and 2010.

Safety

Perceptions of safety continue to be strong.

Satisfaction with Aspects of Safety

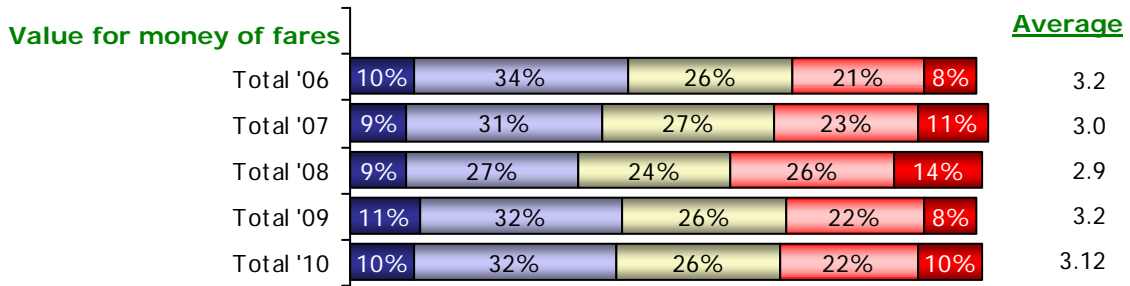


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Overall Value

The improvements made in ratings for *value for money of fares* in 2009 have been largely maintained.

Satisfaction with Overall Value



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

Appendices

Route-by-Route Satisfaction Score for Each Attribute:

Ferry Routes Included in Customer Satisfaction Survey - 2010	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay–Descanso Bay, Gabriola Island
Route 21	Denman-Buckley Bay
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

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

Average Satisfaction Ratings by Route – All Waves 2010
(See page 34 for Route Number Codes)

	Total	Larger Routes					Route	Smaller Routes				
		Total	1	2	30	3	Total	4	19	21	5/9	23
OVERALL EXPERIENCE												
Trip overall	4.22	4.32	4.35	4.26	4.32	4.05	4.01	4.20	3.79	-	4.02	-
BEFORE ARRIVING AT TERMINAL												
Usefulness of BC Ferries website	4.28	4.32	4.32	4.30	4.35	4.25	4.18	4.33	4.05	-	4.16	-
Ease of using on-line reservations	4.06	4.08	4.07	4.07	4.15	4.02	3.98	3.93	3.87	-	4.03	-
Usefulness of BC Ferries phone service	3.63	3.66	3.67	3.71	3.57	3.39	3.68	3.77	3.27	-	3.79	-
Ease of using automated phone service	3.33	3.42	3.40	3.42	3.44	3.02	3.28	3.24	2.92	-	3.43	-
Highway signage	4.00	4.05	4.17	3.85	4.08	3.86	3.94	3.97	3.77	-	3.99	-
TERMINAL EXPERIENCE												
Terminal overall	4.07	4.15	4.16	4.13	4.18	3.91	3.91	3.92	3.76	-	3.98	-
Outside appearance of the terminal	4.04	4.13	4.15	4.10	4.12	3.86	3.90	3.94	3.65	-	4.02	-
Ticket Purchase												
Efficiency of the transaction	4.44	4.50	4.50	4.49	4.52	4.28	4.33	4.23	4.35	-	4.38	-
Staff courtesy	4.44	4.48	4.47	4.48	4.53	4.32	4.37	4.31	4.43	-	4.37	-
Clarity of staff directions	4.37	4.42	4.41	4.41	4.44	4.30	4.27	4.21	4.34	-	4.26	-
Food & Beverage Services at the Terminal												
Food beverages offered	3.57	3.62	3.67	3.56	3.61	3.41	3.34	3.21	-	-	3.39	-
Value for money	2.99	3.05	3.11	2.95	3.03	2.75	2.93	2.76	-	-	3.01	-
Gift Shop/ News Stand at the Terminal												
Variety/ selection of merchandise	3.85	3.89	3.89	3.86	3.96	3.82	3.51	3.40	-	-	3.57	-
Value for money	3.34	3.37	3.41	3.32	3.35	3.33	3.16	3.03	-	-	3.22	-
Outdoor Market Area at the Terminal												
Variety/ selection of merchandise	3.47	3.60	3.70	3.48	3.54	3.00	3.46	3.49	-	-	3.43	-
Value for money	3.23	3.29	3.40	3.15	3.24	2.95	3.25	3.18	-	-	3.29	-
Other Terminal Services												
Clarity of public address system	3.48	3.57	3.58	3.52	3.61	3.29	3.32	3.45	3.06	-	3.38	-
Announcements when you need to be informed	3.72	3.81	3.85	3.75	3.81	3.53	3.52	3.63	3.32	-	3.54	-
Overall look & décor inside terminal	3.89	3.95	3.96	3.99	3.85	3.71	3.76	3.79	-	-	3.75	-
Availability of washrooms	4.08	4.14	4.18	4.08	4.15	4.03	3.90	4.05	3.64	-	3.97	-
Cleanliness of washrooms	4.01	4.07	4.10	3.98	4.18	3.89	3.90	3.94	3.70	-	4.00	-
Procedures for loading	4.04	4.12	4.17	4.07	4.06	3.90	3.87	3.99	3.79	-	3.84	-
Professionalism of terminal staff	4.17	4.21	4.25	4.16	4.20	4.07	4.10	4.10	4.15	-	4.07	-

continued...

Average Satisfaction Ratings by Route – All Waves 2010
(See page 34 for Route Number Codes)

	Total	Larger Routes					Route 3	Smaller Routes				
		Total	1	2	30	4		19	21	5/9	23	
Foot Passenger Services at the Terminal												
Usefulness of TV info screens	3.74	3.81	3.84	3.76	3.82	3.28	3.73	3.73	-	-	-	-
Availability of parking spaces	3.65	3.82	3.87	3.65	4.13	3.70	3.05	3.18	2.48	-	3.69	-
Parking value for money	2.87	2.81	2.86	2.75	2.76	3.17	2.81	2.43	3.01	-	2.79	-
Ease of using passenger drop-off/ pick-up area	3.81	3.87	4.03	3.60	4.08	4.02	3.42	3.41	2.94	-	3.81	-
Availability of seating in pre-boarding lounge at terminal	3.64	3.64	3.56	3.77	3.55	3.68	3.62	3.78	3.18	-	3.93	-
Comfort of seating in pre-boarding lounge at terminal	3.54	3.57	3.61	3.60	3.32	3.60	3.40	3.65	2.82	-	3.77	-
Cleanliness of pre-boarding lounge	3.96	3.99	4.02	4.03	3.71	3.93	3.87	3.96	3.54	-	4.10	-
ONBOARD EXPERIENCE												
Onboard overall	4.14	4.22	4.26	4.16	4.20	4.08	3.90	4.02	3.65	-	3.97	-
Gift Shop/ News Stand												
Variety/ selection of merchandise	4.02	4.04	4.03	4.01	4.12	4.04	3.80	-	-	-	3.80	-
Staff courtesy	4.21	4.23	4.20	4.23	4.32	4.18	4.06	-	-	-	4.06	-
Ease of moving around inside shop	3.61	3.63	3.67	3.50	3.79	3.55	3.60	-	-	-	3.60	-
Value for money	3.37	3.37	3.36	3.35	3.43	3.43	3.31	-	-	-	3.31	-
Food Services												
Length of time in line for food services	3.66	3.65	3.65	3.56	3.84	3.65	3.73	-	-	-	3.73	-
Food/ beverages offered	3.60	3.63	3.64	3.56	3.72	3.58	3.35	-	-	-	3.35	-
Staff courtesy	4.20	4.20	4.20	4.16	4.27	4.22	4.13	-	-	-	4.13	-
Availability of seating	4.06	4.06	4.09	3.93	4.22	4.14	3.95	-	-	-	3.95	-
Comfort of seating	3.91	3.93	3.94	3.83	4.07	3.93	3.66	-	-	-	3.66	-
Cleanliness of seating area	4.12	4.14	4.14	4.11	4.20	4.14	3.93	-	-	-	3.93	-
Value for money	3.17	3.19	3.26	3.06	3.23	3.08	3.10	-	-	-	3.10	-
Washrooms												
Availability of washrooms	4.11	4.16	4.21	4.07	4.20	4.07	3.95	3.96	3.82	-	4.01	-
Cleanliness of washrooms	4.02	4.08	4.15	3.91	4.19	3.89	3.90	3.83	3.90	-	3.94	-
Lounge Seating												
Comfort of indoor lounge seating	3.98	4.11	4.17	3.99	4.15	4.01	3.43	3.38	2.83	-	3.77	-
Cleanliness of indoor lounge seating area	4.16	4.22	4.28	4.13	4.19	4.15	3.95	3.85	3.85	-	4.04	-

continued...

Average Satisfaction Ratings by Route – All Waves 2010
(See page 34 for Route Number Codes)

	Total	Larger Routes					Route 3	Smaller Routes				
		Total	1	2	30	4		19	21	5/9	23	
Other Onboard Facilities/ Services												
Play area for children	3.54	3.57	3.66	3.39	3.63	3.52	3.41	-	-	-	3.41	-
Video arcade	3.49	3.53	3.62	3.42	3.48	3.44	3.18	-	-	-	3.18	-
Work stations	3.82	3.86	3.93	3.76	3.83	3.81	3.65	-	-	-	3.65	-
Outside decks	4.00	4.08	4.15	3.95	4.05	3.97	3.82	3.92	3.65	-	3.88	-
Outside appearance of the vessel overall	4.01	4.12	4.18	4.04	4.09	3.83	3.80	3.93	3.84	-	3.70	-
Availability of tourist and travel information	4.02	4.05	4.04	4.06	4.05	4.17	3.81	3.87	3.33	-	3.98	-
Ease of access, overall, for people with disabilities	3.71	3.86	3.82	3.91	3.84	3.66	3.35	3.63	3.00	-	3.45	-
Ease of finding facilities/ services	3.91	3.94	3.94	3.93	4.00	3.92	3.76	3.76	3.61	-	3.85	-
Clarity of public address system	3.71	3.79	3.74	3.80	3.96	3.68	3.38	3.58	2.85	-	3.55	-
Announcements when you need to be informed	3.86	3.94	3.94	3.91	4.02	3.79	3.58	3.76	3.16	-	3.69	-
Atmosphere/ environment	3.99	4.07	4.08	4.05	4.11	3.95	3.72	3.78	3.47	-	3.82	-
Procedures for unloading	3.99	4.08	4.14	4.00	4.04	3.88	3.77	3.95	3.53	-	3.80	-
Professionalism with onboard staff	4.21	4.26	4.30	4.19	4.24	4.14	4.09	4.12	4.11	-	4.06	-
Experience with the Sailing Schedule												
Earliest ferry earliest enough	4.01	4.03	4.00	4.06	4.10	4.01	3.95	4.07	4.17	-	3.76	-
Latest ferry late enough	3.44	3.51	3.52	3.43	3.68	3.05	3.57	3.24	3.95	-	3.53	-
Ferry sailing frequent enough	3.51	3.65	3.76	3.49	3.59	3.14	3.37	3.61	3.70	-	3.05	-
Ability to get onto desired ferry	3.82	3.89	3.93	3.80	3.95	3.65	3.71	3.86	3.34	-	3.83	-
Ability to connect with other sailings (based on those connecting)	3.33	3.46	3.48	3.18	4.29	3.27	3.22	3.05	2.77	-	3.65	-
Ferry departing on time	3.87	4.08	4.13	3.98	4.09	3.43	3.48	3.85	3.35	-	3.35	-
Safety												
Safety of ferry operations	4.19	4.22	4.25	4.17	4.21	4.15	4.09	4.16	4.03	-	4.09	-
Safety of loading/unloading	4.19	4.23	4.27	4.19	4.18	4.14	4.10	4.18	4.04	-	4.09	-
OVERALL VALUE												
Value for money of fares	3.12	3.14	3.19	3.12	3.05	3.06	3.07	3.23	2.78	-	3.16	-

TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal - All Waves 2010 -								
	Total	Terminals						
		Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Fulford Harbour
OVERALL EXPERIENCE								
Trip overall	4.22	4.30	4.38	4.11	4.31	4.10	4.29	4.28
TERMINAL EXPERIENCE								
Terminal overall	4.07	4.16	4.14	3.96	4.20	3.94	4.14	3.96
Outside appearance of the terminal	4.04	4.14	4.13	3.92	4.22	3.85	4.13	3.90
Ticket Purchase								
Efficiency of the transaction	4.44	4.50	4.49	4.35	4.55	4.30	4.50	4.06
Staff courtesy	4.44	4.47	4.50	4.35	4.56	4.33	4.47	4.20
Clarity of staff directions	4.37	4.39	4.42	4.30	4.52	4.26	4.41	4.16
Food & Beverage Services at the Terminal								
Food beverages offered	3.57	3.66	3.65	3.45	3.62	3.42	3.44	3.25
Value for money	2.99	3.12	3.06	2.77	3.01	2.86	2.82	2.95
Gift Shop/ News Stand at the Terminal								
Variety/ selection of merchandise	3.85	3.97	3.77	3.87	3.86	3.76	3.82	3.61
Value for money	3.34	3.40	3.36	3.30	3.33	3.37	3.26	3.23
Outdoor Market Area at the Terminal								
Variety/ selection of merchandise	3.47	3.72	3.66	3.28	3.46	3.05	3.34	3.46
Value for money	3.23	3.38	3.36	3.06	3.07	3.04	3.13	3.32
Other Terminal Services								
Clarity of Public address system	3.48	3.56	3.58	3.35	3.59	3.36	3.71	3.33
Announcements when you need to be informed	3.72	3.81	3.86	3.60	3.77	3.61	3.85	3.58
Overall look & décor inside terminal	3.89	3.91	3.97	3.77	4.13	3.70	3.85	3.74
Usefulness of TV info screens	3.74	3.79	3.87	3.53	3.78	3.42	3.81	3.75
Availability of washrooms	4.08	4.18	4.17	4.01	4.13	4.05	4.14	3.94
Cleanliness of washrooms	4.01	4.13	4.06	3.91	4.02	3.90	4.18	3.93
Procedures for loading	4.04	4.12	4.17	3.92	4.14	3.99	4.11	3.99
Professionalism of terminal staff	4.17	4.23	4.24	4.06	4.23	4.12	4.17	4.09
Foot Passenger Services at the Terminal								
Availability of parking spaces	3.65	3.87	3.89	3.54	3.82	3.72	4.21	2.62
Parking value for money	2.87	2.86	2.75	2.85	2.85	3.26	2.90	2.61
Ease of using passenger drop-off/ pick-up area	3.81	4.05	4.01	3.71	3.65	4.15	3.99	3.12
Availability of seating in pre-boarding lounge at terminal	3.64	3.37	3.74	3.60	3.97	3.75	3.85	3.78
Comfort of seating in pre-boarding lounge at terminal	3.54	3.43	3.69	3.54	3.75	3.52	3.60	3.67
Cleanliness of pre-boarding lounge	3.96	3.84	4.08	3.89	4.18	3.99	3.99	3.96
OVERALL VALUE								
Value for money of fares	3.12	3.08	3.28	3.07	3.09	3.13	3.02	3.30

Research Methodology

Background

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

Project Overview

The 2003 Customer Satisfaction Tracking Study acted as a baseline for the newly formed B.C. Ferry Services Inc. and was designed to track performance on satisfaction levels overall and with specific service attributes. Once a year, the annual satisfaction scores will be published on the BC Ferries web site as required by the Coastal Ferry Services Contract.

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

Research Objectives

The specific objectives are as follows:

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

Quantitative Tracking Research

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

Immediately following this “screener”, passengers were asked to complete a survey *after* they disembarked and left the terminal area. The completed survey was returned in a postage pre-paid envelope. Respondents were instructed to complete the survey within 48 hours of receiving it to ensure top-of-mind experiences were recorded.

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

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

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

Sample Size

The total sample of placements was disproportionately distributed across larger and smaller routes to ensure a minimum number of interviews per route for reliability.

Routes surveyed and the number of screeners and completed returned surveys from each route during 2010 are as follows:

	All Waves 2010	
	<u>Screeners</u>	<u>Returns</u>
Route 1: Tsawwassen-Swartz Bay	1,958	735
Route 2: Horseshoe Bay-Departure Bay	1,970	724
Route 3: Horseshoe Bay-Langdale	1,326	526
Route 30: Tsawwassen-Duke Point	1,615	681
Route 4: Swartz Bay-Fulford Harbour, Saltspring Island	1,186	517
Route 19: Departure Bay–Descanso Bay, Gabriola Island	1,269	435
Rout 21: Denman-Buckley Bay	n/a	n/a
Route 5/9: Southern Gulf Islands	2,467	1,213
Route 23: Campbell River-Quadra Island	n/a	n/a
TOTAL	11,791	4,741

Sample Validation and Weighting

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

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

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

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

Actual & Weighted Distribution of the Sample – All Waves 2010 –				
	Screeners		Returns	
	<u>Actual</u> (11,791) %	<u>Weighted</u> (11,791) %	<u>Actual</u> (4,741) %	<u>Weighted</u> (4,741) %
Weekend				
Route:				
1	6	13	6	14
2	6	7	5	7
3	4	5	4	6
30	4	3	4	3
4	3	1	3	1
19	3	1	2	1
21	n/a	n/a	n/a	n/a
5/9	7	2	7	2
23	n/a	n/a	n/a	n/a
Weekday				
Route:				
1	11	24	10	22
2	11	15	10	14
3	8	11	7	11
30	10	6	10	7
4	7	3	8	3
19	8	4	7	4
21	n/a	n/a	n/a	n/a
5/9	14	4	17	6
23	n/a	n/a	n/a	n/a

Data Collection

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

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

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

Interviewing and questionnaire placements for the November 2010 Wave was completed between November 24 and December 7, 2010.

Data Analysis

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

The data entry system used for this study includes an internal edit, which is custom programmed. This immediate verification during the data entry process reduces entry errors and a further more detailed computer edit is performed after entry of the data. For standard cross-tabulations, software designed expressly for marketing research was employed. Special editing and cleaning features of this database package ensure that the records are data entered and coded with accuracy. Further rigorous checks for inherent logic and consistency were performed prior to data tabulation.

Response Rate

The following outlines the response rates achieved in 2010.

Response Rates	
	<u>All Waves 2010</u> <u>(%)</u>
Route 1	38
Route 2	37
Route 3	40
Route 30	42
Route 4	44
Route 19	34
Route 21	n/a
Route 5/9	46
Route 23	n/a
Overall response	40

Margin of Error

Overall, the tolerance limits for the 2010 research year at the 95% level of confidence, based on the most conservative case (i.e., a statistic of 50%) are as follows:

Tolerance Limits – All Waves 2010		
	<u>Actual</u> <u>Sample Size</u>	<u>Approximate</u> <u>Tolerance Limits</u> <u>% Points</u>
Total Screeners	11,791	+/- 0.9%
Total Returns	4,741	+/- 1.4%
Individual Route Returns		
Route 1	735	+/- 3.6%
Route 2	724	+/- 3.6%
Route 3	526	+/- 4.3%
Route 30	681	+/- 3.8%
Route 4	517	+/- 4.3%
Route 19	435	+/- 4.7%
Route 21	n/a	n/a
Route 5/9	1,123	+/- 2.9%
Route 23	n/a	n/a

These tolerance limits apply to a true random sample typically achieved through a general population telephone survey. However, in similar studies, we have found that our sampling rigours have consistently produced an accuracy level well within the tolerance limits described here.