Customer Satisfaction Tracking
Annual Report 2013

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 2013. 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 2013, a total of 11,199 screeners were completed and 4,952 questionnaires returned. A more detailed explanation of the research design is included in the Research Methodology section, in the Appendix of this report.
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 87% of passengers in 2013 reported to be satisfied overall with their experience travelling on BC Ferries. An overall score of 4.17 has been achieved (on a five-point scale where ‘1’ means ‘very dissatisfied’ and ‘5’ means ‘very satisfied’). These findings are consistent with those recorded in 2012 (4.19 average score, 88% satisfied).

- Furthermore, the overall satisfaction scores have been stable by route except levels have weakened on Route 3 (3.96 average score, versus 4.11 in 2012). Ratings were lowest in the June and August measure but recovered in November on this route.

- Also note that Route 5/9 is trending upward, now at 4.15 (versus 4.02 three years ago).

**Satisfaction before Arriving at Terminal**

- Satisfaction with the web site and the on-line reservation system had declined in 2011 but ratings for each have recovered somewhat, particularly for on-line reservations (3.93 in ‘13 up from 3.78 in ‘11).

- Ratings are also directionally higher with respect to the usefulness of BC Ferries phone service.

**Satisfaction at the Terminal**

- Overall satisfaction with the experience at the terminal before boarding is consistent with a year ago, with 85% satisfied and no significant change in the average score of 4.08. Satisfaction ratings also have not changed by terminal.

- Furthermore, ratings in 2013 have remained stable with respect to all attributes and services at the terminal, but we do note an improvement in value for money ratings with food/beverages services (from 2.98 to 3.09), with ratings improving at all terminals.

**Satisfaction Onboard**

- A total of 89% of passengers in 2013 were satisfied with their overall experience onboard, for an overall rating of 4.13 on the 5-point scale, consistent with the average score achieved in 2012 (4.14). Ratings are stable on most routes.

- Satisfaction levels have also been stable on most aspects of onboard services; however, ratings have improved with perceptions of the value for money of food/beverage services (from 3.14 rating a year ago to 3.24). We also note a directional increase in ratings for selection of food/beverages.
Satisfaction with Sailing Schedules

➢ Satisfaction levels with many aspects of sailing schedules improved in 2012. However, ratings overall have slipped back with respect to on-time departures, and ability to get on desired sailing.

Satisfaction with Safety

➢ Perceptions of safety of ferry operations have strengthened (4.20 compared to 4.17 in previous two years).

Satisfaction with Overall Value

➢ Satisfaction levels with value for money of fares have been stable.
Key Conclusions

In summary, customer satisfaction levels have been very stable in 2013 with some improvements noted in opinions of on-line reservations and the value perception of terminal and onboard food and beverages. The key areas of success in 2013 have continued to be in the following areas:

- Staff at the terminal and onboard
- 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
- Outside decks and overall appearance of vessels
- 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
- 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.

<table>
<thead>
<tr>
<th>Route No.</th>
<th>Description of Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1</td>
<td>Tsawwassen-Swartz Bay</td>
</tr>
<tr>
<td>Route 2</td>
<td>Horseshoe Bay-Departure Bay</td>
</tr>
<tr>
<td>Route 3</td>
<td>Horseshoe Bay-Langdale</td>
</tr>
<tr>
<td>Route 30</td>
<td>Tsawwassen-Duke Point</td>
</tr>
<tr>
<td>Route 4</td>
<td>Swartz Bay-Fulford Harbour, Salt Spring Island</td>
</tr>
<tr>
<td>Route 19</td>
<td>Departure Bay-Descanso Bay, Gabriola Island</td>
</tr>
<tr>
<td>Route 5/9</td>
<td>Southern Gulf Islands (from Swartz Bay/from Tsawwassen)</td>
</tr>
</tbody>
</table>
Overall Satisfaction with BC Ferries

A total of 87% of passengers in 2013 reported to be satisfied overall with their experience travelling on BC Ferries. An overall score of 4.17 has been achieved (on a five-point scale where ‘1’ means ‘very dissatisfied’ and ‘5’ means ‘very satisfied’). These findings are consistent with those recorded in 2012 (4.19 average score, 88% satisfied).

Furthermore, the overall satisfaction scores have been stable by route except levels have weakened on Route 3 (3.96 average score, versus 4.11 in 2012). Ratings were lowest in the June and August measure but recovered in November on this route.

Also note that Route 5/9 is trending upward, now at 4.15 (versus 4.02 three years ago).

[NOTE: Refer to page 5 for route number codes]
Overall Satisfaction Level with Recent Experience
Travelling with BC Ferries
(%)  

<table>
<thead>
<tr>
<th>All BC Ferries Routes</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
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<tbody>
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<td>4.18</td>
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<td>Route 19</td>
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<td>49</td>
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</tr>
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<td>Total '12</td>
<td>34</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>4.11</td>
</tr>
<tr>
<td>Total '13</td>
<td>36</td>
<td>48</td>
<td>48</td>
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<td>4.13</td>
</tr>
<tr>
<td>Route 5/9</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>28</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>4.02</td>
</tr>
<tr>
<td>Total '11</td>
<td>30</td>
<td>55</td>
<td>55</td>
<td>55</td>
<td>4.07</td>
</tr>
<tr>
<td>Total '12</td>
<td>31</td>
<td>55</td>
<td>55</td>
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<tr>
<td>Total '13</td>
<td>31</td>
<td>57</td>
<td>57</td>
<td>57</td>
<td>4.15</td>
</tr>
</tbody>
</table>

Legend:
- Very satisfied (5)
- Satisfied (4)
- Neither satisfied/dissatisfied (3)
- Dissatisfied (2)
- Very dissatisfied (1)

Q.1) How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?
The following chart summarizes the results from overall measures of each main point of contact and specifically with BC Ferries staff. Performance ratings have been stable on these key measures.

<table>
<thead>
<tr>
<th>Summary of Main Satisfaction Scores (%)</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall experience at terminal before boarding</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>26 58 12 3</td>
</tr>
<tr>
<td>Total '11</td>
<td>27 58 12 3</td>
</tr>
<tr>
<td>Total '12</td>
<td>26 58 13 3</td>
</tr>
<tr>
<td>Total '13</td>
<td>26 59 12 3</td>
</tr>
<tr>
<td><strong>Overall experience onboard the ferry</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>28 62 8 1</td>
</tr>
<tr>
<td>Total '11</td>
<td>26 62 10 1</td>
</tr>
<tr>
<td>Total '12</td>
<td>26 64 8 1</td>
</tr>
<tr>
<td>Total '13</td>
<td>25 64 10 1</td>
</tr>
<tr>
<td><strong>Safety of Ferry operations</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>31 57 12 3</td>
</tr>
<tr>
<td>Total '11</td>
<td>30 59 11 1</td>
</tr>
<tr>
<td>Total '12</td>
<td>29 59 11 1</td>
</tr>
<tr>
<td>Total '13</td>
<td>31 58 11 1</td>
</tr>
<tr>
<td><strong>Professionalism of terminal staff</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>32 56 11 3</td>
</tr>
<tr>
<td>Total '11</td>
<td>31 56 11 1</td>
</tr>
<tr>
<td>Total '12</td>
<td>31 57 11 1</td>
</tr>
<tr>
<td>Total '13</td>
<td>33 55 11 1</td>
</tr>
<tr>
<td><strong>Professionalism of onboard staff</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>32 59 9 1</td>
</tr>
<tr>
<td>Total '11</td>
<td>30 59 10 1</td>
</tr>
<tr>
<td>Total '12</td>
<td>32 59 9 1</td>
</tr>
<tr>
<td>Total '13</td>
<td>32 59 8 1</td>
</tr>
</tbody>
</table>

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

**Web site and Phone Contact**

Satisfaction with the web site and the on-line reservation system had declined in 2011 but ratings for each of have recovered, particularly for on-line reservations (3.93 in ’13 up from 3.78 in ’11).

Ratings are also directionally higher with respect to the usefulness of BC Ferries phone service.

<table>
<thead>
<tr>
<th>Usefulness of BC Ferries Web site</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total ’10</td>
<td></td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>39</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>53</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
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<tr>
<td>Dissatisfied (2)</td>
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<tr>
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<td>5</td>
</tr>
<tr>
<td>4.28</td>
<td></td>
</tr>
<tr>
<td>Total ’11</td>
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<tr>
<td>Very satisfied (5)</td>
<td>30</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>56</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>8</td>
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<tr>
<td>Dissatisfied (2)</td>
<td>12</td>
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<tr>
<td>Very dissatisfied (1)</td>
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<tr>
<td>4.09</td>
<td></td>
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<tr>
<td>Total ’12</td>
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<tr>
<td>Very satisfied (5)</td>
<td>31</td>
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<tr>
<td>Satisfied (4)</td>
<td>57</td>
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<tr>
<td>Neither satisfied/dissatisfied (3)</td>
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<tr>
<td>4.13</td>
<td></td>
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<tr>
<td>Total ’13</td>
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<tr>
<td>Very satisfied (5)</td>
<td>31</td>
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<tr>
<td>Satisfied (4)</td>
<td>56</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>9</td>
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<tr>
<td>Dissatisfied (2)</td>
<td>14</td>
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<tr>
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<tr>
<td>4.13</td>
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<table>
<thead>
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<th>Ease of using on-line reservations</th>
<th>Average</th>
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<td>Satisfied (4)</td>
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<tr>
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<td>Satisfied (4)</td>
<td>38</td>
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<td>Dissatisfied (2)</td>
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<td>3.54</td>
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<table>
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<tr>
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<tr>
<td>3.30</td>
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<tr>
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<tr>
<td>Dissatisfied (2)</td>
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<td>3.33</td>
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<td>14</td>
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<tr>
<td>Satisfied (4)</td>
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<td>Dissatisfied (2)</td>
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<tr>
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</tr>
</tbody>
</table>

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

* 69% usage web site, 32% for on-line reservations

** 18% usage phone service, 14% for automated system
**Highway Signage**

Ratings have been stable for highway signage.

<table>
<thead>
<tr>
<th>Satisfaction with Highway Signage* (%)</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Passengers</strong></td>
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</tr>
<tr>
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<tr>
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<tr>
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<td>25</td>
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<tr>
<td>Total '13</td>
<td>26</td>
</tr>
<tr>
<td><strong>Departure Terminals</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Tsawwassen</strong></td>
<td></td>
</tr>
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<td>Total '12</td>
<td>25</td>
</tr>
<tr>
<td>Total '13</td>
<td>29</td>
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<tr>
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</tr>
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</tr>
<tr>
<td>Total '11</td>
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<tr>
<td><strong>Horseshoe Bay</strong></td>
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</tr>
<tr>
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<tr>
<td>Total '11</td>
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<td>Total '13</td>
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<td>30</td>
</tr>
<tr>
<td>Total '13</td>
<td>30</td>
</tr>
</tbody>
</table>

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

*Usage: 76%*

- Very satisfied (5)
- Satisfied (4)
- Neither satisfied/dissatisfied (3)
- Dissatisfied (2)
- Very dissatisfied (1)
At the Terminal

**Overall Experience at the Terminal**

Overall satisfaction with the experience at the terminal before boarding is consistent with a year ago, with 85% satisfied and no change in the average score (4.08). Satisfaction ratings also have not changed significantly by terminal.

### Overall Satisfaction with Experience at the Terminal Before Boarding (%)

<table>
<thead>
<tr>
<th>Total Passengers</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>26</td>
<td>58</td>
<td>12</td>
<td>3</td>
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<td>26</td>
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#### Major Terminals

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<thead>
<tr>
<th>Tsawwassen</th>
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<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
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</thead>
<tbody>
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<th>Total '12</th>
<th>Total '13</th>
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<td>10</td>
<td>3</td>
<td>4.14</td>
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<tr>
<td></td>
<td>26</td>
<td>63</td>
<td>18</td>
<td>3</td>
<td>4.09</td>
</tr>
<tr>
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<th>Total '13</th>
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<th>Total '13</th>
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<td></td>
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<th>Total '13</th>
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<th>Total '13</th>
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<td>26</td>
<td>59</td>
<td>10</td>
<td>4</td>
<td>4.06</td>
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</tbody>
</table>

Legend:
- **Very satisfied** (5)
- **Satisfied** (4)
- **Neither satisfied/dissatisfied** (3)
- **Dissatisfied** (2)
- **Very dissatisfied** (1)

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

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

### Satisfaction with Aspects of Ticket Purchase (\%)

<table>
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<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied (5)</td>
<td>52</td>
<td>42</td>
<td>50</td>
<td>53</td>
<td>4.44</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4.41</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
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<td></td>
<td></td>
<td></td>
<td>4.42</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
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<td></td>
<td></td>
<td></td>
<td>4.45</td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
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<table>
<thead>
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<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied (5)</td>
<td>53</td>
<td>40</td>
<td>50</td>
<td>53</td>
<td>4.44</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4.41</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4.44</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4.46</td>
</tr>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Clarity of staff directions</th>
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<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
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</thead>
<tbody>
<tr>
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<td>49</td>
<td>50</td>
<td>4.37</td>
</tr>
<tr>
<td>Satisfied (4)</td>
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<td></td>
<td></td>
<td></td>
<td>4.35</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
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<td></td>
<td></td>
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<td>4.38</td>
</tr>
<tr>
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<td>Very dissatisfied (1)</td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

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 offered at terminals also are relatively unchanged, but we do note an improvement in value for money ratings (from 2.98 to 3.09), with ratings improving at all terminals.

### Satisfaction with Aspects of Food and Beverage Services at Terminal*

<table>
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<tr>
<th></th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
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<td>16</td>
<td>15</td>
<td>16</td>
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</tr>
<tr>
<td></td>
<td>50</td>
<td>46</td>
<td>48</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>21</td>
<td>22</td>
<td>21</td>
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</tr>
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<td></td>
</tr>
<tr>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Food/beverages offered**

<table>
<thead>
<tr>
<th></th>
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<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
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<td>8</td>
<td>8</td>
<td>2.99</td>
</tr>
<tr>
<td></td>
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<td>29</td>
<td>33</td>
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<td>25</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>11</td>
<td>11</td>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>

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

* 44% usage overall; excluding Route 19.
### Retail Services at Terminal

Satisfaction ratings are not statistically different from 2012 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*

<table>
<thead>
<tr>
<th></th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gift Shop/News Stand</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>variety/selection</td>
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<td>53</td>
<td>21</td>
<td>42</td>
<td>3.85</td>
</tr>
<tr>
<td></td>
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* Usage: 38% gift shop, 23% outdoor market; excluding Route 19.

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

Furthermore there are no significant changes in satisfaction levels with foot passenger services from a year ago.

### Satisfaction with Foot Passenger Services (%)

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<th>Total '13</th>
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Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

Usage: 35% are foot passengers (including bus).

Other Terminal Services

Satisfaction levels have been stable on all other terminal services as well.

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<th>Total '12</th>
<th>Total '13</th>
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<th>Announcements when you need to be informed</th>
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<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
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<tbody>
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<th>Total '12</th>
<th>Total '13</th>
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<th>Total '12</th>
<th>Total '13</th>
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<td>58</td>
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</table>

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

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

A total of 89% of passengers in 2013 were satisfied with their overall experience onboard, for an overall rating of 4.13 on the 5-point scale, consistent with the average score achieved in 2012 (4.14).

Ratings are stable on all routes.

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

#### Overall Satisfaction with Onboard Experience

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<td>65</td>
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<td>0</td>
<td>4.19</td>
</tr>
<tr>
<td>Total '13</td>
<td>27</td>
<td>64</td>
<td>8</td>
<td>0</td>
<td>4.16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Route 4</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>22</td>
<td>62</td>
<td>4</td>
<td>0</td>
<td>4.02</td>
</tr>
<tr>
<td>Total '11</td>
<td>20</td>
<td>65</td>
<td>14</td>
<td>1</td>
<td>4.01</td>
</tr>
<tr>
<td>Total '12</td>
<td>19</td>
<td>63</td>
<td>6</td>
<td>1</td>
<td>4.00</td>
</tr>
<tr>
<td>Total '13</td>
<td>20</td>
<td>63</td>
<td>6</td>
<td>1</td>
<td>4.01</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Route 19</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>12</td>
<td>56</td>
<td>22</td>
<td>8</td>
<td>3.65</td>
</tr>
<tr>
<td>Total '11</td>
<td>15</td>
<td>64</td>
<td>18</td>
<td>10</td>
<td>3.89</td>
</tr>
<tr>
<td>Total '12</td>
<td>22</td>
<td>62</td>
<td>13</td>
<td>1</td>
<td>4.02</td>
</tr>
<tr>
<td>Total '13</td>
<td>20</td>
<td>65</td>
<td>14</td>
<td>1</td>
<td>4.02</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Route 5/9</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>20</td>
<td>63</td>
<td>17</td>
<td>5</td>
<td>3.97</td>
</tr>
<tr>
<td>Total '11</td>
<td>23</td>
<td>62</td>
<td>14</td>
<td>5</td>
<td>4.04</td>
</tr>
<tr>
<td>Total '12</td>
<td>20</td>
<td>67</td>
<td>9</td>
<td>6</td>
<td>4.05</td>
</tr>
<tr>
<td>Total '13</td>
<td>23</td>
<td>64</td>
<td>12</td>
<td>5</td>
<td>4.09</td>
</tr>
</tbody>
</table>

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

- Very satisfied (5)
- Satisfied (4)
- Neither satisfied/dissatisfied (3)
- Dissatisfied (2)
- Very dissatisfied (1)
**Onboard Gift Shop/News Stand**

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

<table>
<thead>
<tr>
<th>Operational Area</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff courtesy</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>58</td>
<td>55</td>
<td>58</td>
<td>58</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td>4.21</td>
<td>4.17</td>
<td>4.19</td>
<td>4.21</td>
</tr>
<tr>
<td><strong>Variety/selection of merchandise</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>24</td>
<td>23</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>24</td>
<td>23</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>57</td>
<td>59</td>
<td>59</td>
<td>58</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td>4.02</td>
<td>4.02</td>
<td>4.04</td>
<td>4.05</td>
</tr>
<tr>
<td><strong>Value for money</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>9</td>
<td>10</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>9</td>
<td>10</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>41</td>
<td>39</td>
<td>43</td>
<td>39</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>33</td>
<td>32</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td>3.37</td>
<td>3.36</td>
<td>3.38</td>
<td>3.39</td>
</tr>
<tr>
<td><strong>Ease of moving around inside shop</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>13</td>
<td>12</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>13</td>
<td>12</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>49</td>
<td>47</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>26</td>
<td>27</td>
<td>24</td>
<td>26</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td>3.61</td>
<td>3.56</td>
<td>3.62</td>
<td>3.62</td>
</tr>
</tbody>
</table>

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

* Excludes Routes 4 & 19.

Usage: 57% gift shop/news stand.
Onboard Food Services

Satisfaction levels with the value for money of onboard food/beverage services have improved (from 3.14 rating a year ago to 3.24). We also note a directional increase in ratings for food/beverages offered.

<table>
<thead>
<tr>
<th>Satisfaction with Aspects of Food and Beverage Services Onboard* (%)</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff courtesy</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>32</td>
</tr>
<tr>
<td>Total '11</td>
<td>32</td>
</tr>
<tr>
<td>Total '12</td>
<td>31</td>
</tr>
<tr>
<td>Total '13</td>
<td>33</td>
</tr>
<tr>
<td><strong>Cleanliness of seating area</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>26</td>
</tr>
<tr>
<td>Total '11</td>
<td>25</td>
</tr>
<tr>
<td>Total '12</td>
<td>23</td>
</tr>
<tr>
<td>Total '13</td>
<td>24</td>
</tr>
<tr>
<td><strong>Availability of seating</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>25</td>
</tr>
<tr>
<td>Total '11</td>
<td>24</td>
</tr>
<tr>
<td>Total '12</td>
<td>22</td>
</tr>
<tr>
<td>Total '13</td>
<td>24</td>
</tr>
<tr>
<td><strong>Comfort of seating</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>19</td>
</tr>
<tr>
<td>Total '11</td>
<td>20</td>
</tr>
<tr>
<td>Total '12</td>
<td>18</td>
</tr>
<tr>
<td>Total '13</td>
<td>18</td>
</tr>
<tr>
<td><strong>Length of time in line for food service</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>15</td>
</tr>
<tr>
<td>Total '11</td>
<td>14</td>
</tr>
<tr>
<td>Total '12</td>
<td>13</td>
</tr>
<tr>
<td>Total '13</td>
<td>15</td>
</tr>
<tr>
<td><strong>Food/beverage offered</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>12</td>
</tr>
<tr>
<td>Total '11</td>
<td>11</td>
</tr>
<tr>
<td>Total '12</td>
<td>11</td>
</tr>
<tr>
<td>Total '13</td>
<td>13</td>
</tr>
<tr>
<td><strong>Value for money</strong></td>
<td></td>
</tr>
<tr>
<td>Total '10</td>
<td>9</td>
</tr>
<tr>
<td>Total '11</td>
<td>8</td>
</tr>
<tr>
<td>Total '12</td>
<td>8</td>
</tr>
<tr>
<td>Total '13</td>
<td>10</td>
</tr>
</tbody>
</table>

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

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

* Excludes Routes 4 & 19.

Usage: 72% food & beverage services.
**Onboard Washrooms and Onboard Seating**

Ratings for availability and cleanliness of washrooms have been stable.

Ratings are also relatively unchanged for onboard seating.

<table>
<thead>
<tr>
<th>Satisfaction with Onboard Washrooms (%)</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Availability of washrooms</strong></td>
<td></td>
</tr>
<tr>
<td>Total ’10</td>
<td>25</td>
</tr>
<tr>
<td>Total ’11</td>
<td>25</td>
</tr>
<tr>
<td>Total ’12</td>
<td>24</td>
</tr>
<tr>
<td>Total ’13</td>
<td>25</td>
</tr>
<tr>
<td><strong>Cleanliness of washrooms</strong></td>
<td></td>
</tr>
<tr>
<td>Total ’10</td>
<td>24</td>
</tr>
<tr>
<td>Total ’11</td>
<td>24</td>
</tr>
<tr>
<td>Total ’12</td>
<td>23</td>
</tr>
<tr>
<td>Total ’13</td>
<td>23</td>
</tr>
<tr>
<td><strong>Comfort of indoor lounge seating</strong></td>
<td></td>
</tr>
<tr>
<td>Total ’10</td>
<td>24</td>
</tr>
<tr>
<td>Total ’11</td>
<td>24</td>
</tr>
<tr>
<td>Total ’12</td>
<td>22</td>
</tr>
<tr>
<td>Total ’13</td>
<td>22</td>
</tr>
<tr>
<td><strong>Cleanliness of indoor lounge seating area</strong></td>
<td></td>
</tr>
<tr>
<td>Total ’10</td>
<td>28</td>
</tr>
<tr>
<td>Total ’11</td>
<td>27</td>
</tr>
<tr>
<td>Total ’12</td>
<td>25</td>
</tr>
<tr>
<td>Total ’13</td>
<td>27</td>
</tr>
</tbody>
</table>

Legend:
- Very satisfied (5)
- Satisfied (4)
- Neither satisfied/dissatisfied (3)
- Dissatisfied (2)
- Very dissatisfied (1)

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.

<table>
<thead>
<tr>
<th>Professionalism of onboard staff</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>4.21</td>
</tr>
<tr>
<td>Total '11</td>
<td>4.18</td>
</tr>
<tr>
<td>Total '12</td>
<td>4.21</td>
</tr>
<tr>
<td>Total '13</td>
<td>4.21</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outside decks</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>4.00</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>4.01</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>4.00</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>4.03</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Availability of tourist and travel information</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>4.02</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>4.01</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>4.02</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>4.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Procedures for unloading</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>3.99</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>3.96</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>3.99</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>3.98</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ease of finding facilities/services</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>3.91</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>3.92</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>3.93</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>3.92</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Atmosphere/environment</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>3.99</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>3.98</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>3.98</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>3.96</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Announcements when you need to be informed</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total '10</td>
<td>3.86</td>
<td></td>
</tr>
<tr>
<td>Total '11</td>
<td>3.88</td>
<td></td>
</tr>
<tr>
<td>Total '12</td>
<td>3.87</td>
<td></td>
</tr>
<tr>
<td>Total '13</td>
<td>3.91</td>
<td></td>
</tr>
</tbody>
</table>

Q.4) Please rate how satisfied or dissatisfied you were with each of the following.
<table>
<thead>
<tr>
<th>Service</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside appearance of the vessel overall</td>
<td>22</td>
<td>61</td>
<td>58</td>
<td>60</td>
<td>4.00</td>
</tr>
<tr>
<td>Play area for children*</td>
<td>12</td>
<td>47</td>
<td>27</td>
<td>48</td>
<td>3.64</td>
</tr>
<tr>
<td>* Excludes Routes 4 &amp; 19.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work stations*</td>
<td>16</td>
<td>58</td>
<td>20</td>
<td>61</td>
<td>3.76</td>
</tr>
<tr>
<td>* Excludes Routes 4 &amp; 19.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clarity of public address system</td>
<td>16</td>
<td>55</td>
<td>18</td>
<td>9</td>
<td>3.74</td>
</tr>
<tr>
<td>Video arcade*</td>
<td>9</td>
<td>47</td>
<td>31</td>
<td>10</td>
<td>3.49</td>
</tr>
<tr>
<td>* Excludes Routes 4 &amp; 19.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ease of access for people with disabilities</td>
<td>17</td>
<td>52</td>
<td>20</td>
<td>8</td>
<td>3.70</td>
</tr>
</tbody>
</table>

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

Various Aspects of Sailing Schedules

Satisfaction levels with many aspects of sailing schedules improved in 2012. However, ratings have slipped back with respect to on-time departures, and ability to get on desired sailing.

<table>
<thead>
<tr>
<th>Various Aspects of Sailing Schedules</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earliest ferry early enough</td>
<td>4.01</td>
</tr>
<tr>
<td>Ferry departing on time</td>
<td>3.87</td>
</tr>
<tr>
<td>Ability to get on to desired sailing</td>
<td>3.82</td>
</tr>
<tr>
<td>Ferry sailing frequent enough</td>
<td>3.51</td>
</tr>
<tr>
<td>Latest ferry late enough</td>
<td>3.44</td>
</tr>
<tr>
<td>Ability to connect with other sailings*</td>
<td>3.33</td>
</tr>
</tbody>
</table>

* Based on total connecting to another ferry (n=374).

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

- Very satisfied (5)
- Satisfied (4)
- Neither satisfied/dissatisfied (3)
- Dissatisfied (2)
- Very dissatisfied (1)
**Departing on Time**

The following graph details the ratings for “departing on time” by route. Ratings have fallen on Routes 1 and 3 but have strengthened on Route 2 (reversing a downward trend), Route 4 and 5/9.

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

![Graph showing satisfaction with "Departing on Time" by route. Ratings have fallen on Routes 1 and 3 but have strengthened on Route 2 (reversing a downward trend), Route 4 and 5/9.]

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

Perceptions of safety of ferry operations have strengthened (4.2 compared to 4.17 in previous two years).

<table>
<thead>
<tr>
<th>Safety of ferry operations</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>31</td>
<td>30</td>
<td>29</td>
<td>31</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>57</td>
<td>59</td>
<td>59</td>
<td>58</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>12</td>
<td>11</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>4.19</strong></td>
<td><strong>4.17</strong></td>
<td><strong>4.17</strong></td>
<td><strong>4.20</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Safety of loading/unloading</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>31</td>
<td>30</td>
<td>29</td>
<td>32</td>
</tr>
<tr>
<td>Very satisfied (5)</td>
<td>58</td>
<td>59</td>
<td>60</td>
<td>58</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>10</td>
<td>11</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>4.19</strong></td>
<td><strong>4.18</strong></td>
<td><strong>4.18</strong></td>
<td><strong>4.20</strong></td>
</tr>
</tbody>
</table>

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

Satisfaction levels with *value for money of fares* are stable.

<table>
<thead>
<tr>
<th>Value of money of fares</th>
<th>Total '10</th>
<th>Total '11</th>
<th>Total '12</th>
<th>Total '13</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td></td>
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<td>Very satisfied (5)</td>
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<td></td>
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<td>27</td>
<td>3.12</td>
</tr>
<tr>
<td>Satisfied (4)</td>
<td>32</td>
<td>27</td>
<td>28</td>
<td>27</td>
<td>2.94</td>
</tr>
<tr>
<td>Neither satisfied/dissatisfied (3)</td>
<td>26</td>
<td>24</td>
<td>23</td>
<td>26</td>
<td>2.94</td>
</tr>
<tr>
<td>Dissatisfied (2)</td>
<td>22</td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>2.93</td>
</tr>
<tr>
<td>Very dissatisfied (1)</td>
<td>10</td>
<td>14</td>
<td>14</td>
<td>14</td>
<td></td>
</tr>
</tbody>
</table>

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

Route-by-Route Satisfaction Score for Each Attribute

<table>
<thead>
<tr>
<th>Route No.</th>
<th>Description of Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1</td>
<td>Tsawwassen-Swartz Bay</td>
</tr>
<tr>
<td>Route 2</td>
<td>Horseshoe Bay-Departure Bay</td>
</tr>
<tr>
<td>Route 3</td>
<td>Horseshoe Bay-Langdale</td>
</tr>
<tr>
<td>Route 30</td>
<td>Tsawwassen-Duke Point</td>
</tr>
<tr>
<td>Route 4</td>
<td>Swartz Bay-Fulford Harbour, Salt Spring Island</td>
</tr>
<tr>
<td>Route 19</td>
<td>Departure Bay–Descanso Bay, Gabriola Island</td>
</tr>
<tr>
<td>Route 5/9</td>
<td>Southern Gulf Islands (from Swartz Bay/from Tsawwassen)</td>
</tr>
</tbody>
</table>

**NOTE:** Combined, these routes represent approximately 80% of the annual passenger traffic volume on BC Ferries.
<table>
<thead>
<tr>
<th>Average Satisfaction Ratings by Route – All Waves 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>(See page 27 for Route Number Codes)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OVERALL EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip overall</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BEFORE ARRIVING AT TERMINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usefulness of BC Ferries website</td>
</tr>
<tr>
<td>4.13</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TERMINAL EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terminal overall</td>
</tr>
<tr>
<td>4.08</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ticket Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency of the transaction</td>
</tr>
<tr>
<td>4.45</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Food &amp; Beverage Services at the Terminal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food beverages offered</td>
</tr>
<tr>
<td>3.62</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gift Shop/ News Stand at the Terminal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety/ selection of merchandise</td>
</tr>
<tr>
<td>3.86</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outdoor Market Area at the Terminal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety/ selection of merchandise</td>
</tr>
<tr>
<td>3.59</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Terminal Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarity of public address system</td>
</tr>
<tr>
<td>3.59</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

| continued...                                          |
## Average Satisfaction Ratings by Route – All Waves 2013

*(See page 27 for Route Number Codes)*

<table>
<thead>
<tr>
<th>Foot Passenger Services at the Terminal</th>
<th>Total</th>
<th>Larger Routes</th>
<th>Smaller Routes</th>
<th>Smaller Routes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Route 1</td>
<td>Route 2</td>
<td>Route 3</td>
</tr>
<tr>
<td>Usefulness of TV info screens</td>
<td>3.73</td>
<td>3.78</td>
<td>3.79</td>
<td>3.68</td>
</tr>
<tr>
<td>Availability of parking spaces</td>
<td>3.79</td>
<td>4.00</td>
<td>4.15</td>
<td>3.73</td>
</tr>
<tr>
<td>Parking value for money</td>
<td>2.96</td>
<td>2.83</td>
<td>3.02</td>
<td>2.61</td>
</tr>
<tr>
<td>Ease of using passenger drop-off/pick-up area</td>
<td>3.96</td>
<td>4.06</td>
<td>4.12</td>
<td>3.95</td>
</tr>
<tr>
<td>Availability of seating in pre-boarding lounge at terminal</td>
<td>3.70</td>
<td>3.67</td>
<td>3.55</td>
<td>3.82</td>
</tr>
<tr>
<td>Comfort of seating in pre-boarding lounge at terminal</td>
<td>3.69</td>
<td>3.72</td>
<td>3.66</td>
<td>3.77</td>
</tr>
<tr>
<td>Cleanliness of pre-boarding lounge</td>
<td>4.02</td>
<td>4.03</td>
<td>4.00</td>
<td>4.05</td>
</tr>
</tbody>
</table>

### ONBOARD EXPERIENCE

| Onboard overall | 4.13  | 4.17   | 4.21   | 4.11   | 4.16   | 4.03   | 4.05   | 4.01   | 4.02   | 4.09   |

<table>
<thead>
<tr>
<th>Gift Shop/ News Stand</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety/ selection of merchandise</td>
<td>4.05</td>
<td>4.06</td>
<td>4.08</td>
<td>4.05</td>
<td>4.02</td>
<td>4.05</td>
<td>3.77</td>
<td>-</td>
<td>-</td>
<td>3.77</td>
</tr>
<tr>
<td>Staff courtesy</td>
<td>4.21</td>
<td>4.22</td>
<td>4.24</td>
<td>4.23</td>
<td>4.17</td>
<td>4.18</td>
<td>4.08</td>
<td>-</td>
<td>-</td>
<td>4.08</td>
</tr>
<tr>
<td>Ease of moving around inside shop</td>
<td>3.62</td>
<td>3.66</td>
<td>3.70</td>
<td>3.55</td>
<td>3.71</td>
<td>3.46</td>
<td>3.55</td>
<td>-</td>
<td>-</td>
<td>3.55</td>
</tr>
<tr>
<td>Value for money</td>
<td>3.39</td>
<td>3.42</td>
<td>3.41</td>
<td>3.44</td>
<td>3.38</td>
<td>3.36</td>
<td>3.18</td>
<td>-</td>
<td>-</td>
<td>3.18</td>
</tr>
</tbody>
</table>

### Food Services

| Length of time in line for food services | 3.62  | 3.61  | 3.61  | 3.60  | 3.65  | 3.66  | 3.65  | -     | -     | 3.65  |
| Food/ beverages offered           | 3.65  | 3.68  | 3.71  | 3.66  | 3.61  | 3.67  | 3.35  | -     | -     | 3.35  |
| Staff courtesy                   | 4.21  | 4.22  | 4.25  | 4.18  | 4.20  | 4.18  | 4.12  | -     | -     | 4.12  |
| Availability of seating           | 4.05  | 4.04  | 4.02  | 4.01  | 4.16  | 4.09  | 4.01  | -     | -     | 4.01  |
| Comfort of seating                | 3.86  | 3.88  | 3.87  | 3.88  | 3.94  | 3.80  | 3.77  | -     | -     | 3.77  |
| Cleanliness of seating area       | 4.05  | 4.05  | 4.01  | 4.09  | 4.11  | 4.04  | 4.05  | -     | -     | 4.05  |
| Value for money                   | 3.24  | 3.27  | 3.34  | 3.20  | 3.20  | 3.13  | 3.13  | -     | -     | 3.13  |

### Washrooms

| Availability of washrooms         | 4.11  | 4.14  | 4.18  | 4.06  | 4.16  | 4.07  | 4.02  | 4.00  | 3.92  | 4.09  |
| Cleanliness of washrooms          | 4.00  | 4.03  | 4.06  | 3.94  | 4.08  | 3.97  | 3.95  | 3.88  | 3.80  | 4.06  |

### Lounge Seating

| Comfort of indoor lounge seating | 4.01  | 4.07  | 4.10  | 4.00  | 4.07  | 3.99  | 3.77  | 3.46  | 3.61  | 4.00  |
| Cleanliness of indoor lounge seating area | 4.15  | 4.19  | 4.21  | 4.15  | 4.20  | 4.09  | 4.05  | 3.95  | 3.92  | 4.16  |

*continued...*
<table>
<thead>
<tr>
<th>Average Satisfaction Ratings by Route – All Waves 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>(See page 27 for Route Number Codes)</td>
</tr>
</tbody>
</table>

### Other Onboard Facilities/ Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Total</th>
<th>Larger Routes</th>
<th>Route</th>
<th>Smaller Routes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>30</td>
</tr>
<tr>
<td>Play area for children</td>
<td>3.64</td>
<td>3.70</td>
<td>3.91</td>
<td>3.38</td>
</tr>
<tr>
<td>Video arcade</td>
<td>3.57</td>
<td>3.59</td>
<td>3.78</td>
<td>3.31</td>
</tr>
<tr>
<td>Work stations</td>
<td>3.76</td>
<td>3.78</td>
<td>3.89</td>
<td>3.58</td>
</tr>
<tr>
<td>Outside decks</td>
<td>4.03</td>
<td>4.12</td>
<td>4.19</td>
<td>4.01</td>
</tr>
<tr>
<td>Outside appearance of the vessel overall</td>
<td>4.00</td>
<td>4.09</td>
<td>4.21</td>
<td>3.92</td>
</tr>
<tr>
<td>Availability of tourist and travel information</td>
<td>4.00</td>
<td>4.07</td>
<td>4.13</td>
<td>4.01</td>
</tr>
<tr>
<td>Ease of access, overall, for people with disabilities</td>
<td>3.70</td>
<td>3.82</td>
<td>3.85</td>
<td>3.75</td>
</tr>
<tr>
<td>Ease of finding facilities/ services</td>
<td>3.92</td>
<td>3.96</td>
<td>4.00</td>
<td>3.90</td>
</tr>
<tr>
<td>Clarity of public address system</td>
<td>3.74</td>
<td>3.79</td>
<td>3.81</td>
<td>3.72</td>
</tr>
<tr>
<td>Announcements when you need to be informed</td>
<td>3.91</td>
<td>3.96</td>
<td>3.98</td>
<td>3.95</td>
</tr>
<tr>
<td>Atmosphere/ environment</td>
<td>3.96</td>
<td>4.02</td>
<td>4.04</td>
<td>3.96</td>
</tr>
<tr>
<td>Procedures for unloading</td>
<td>3.98</td>
<td>4.03</td>
<td>4.07</td>
<td>3.94</td>
</tr>
<tr>
<td>Professionalism with onboard staff</td>
<td>4.21</td>
<td>4.25</td>
<td>4.29</td>
<td>4.18</td>
</tr>
</tbody>
</table>

### Experience with the Sailing Schedule

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Total</th>
<th>Larger Routes</th>
<th>Route</th>
<th>Smaller Routes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>30</td>
</tr>
<tr>
<td>Earliest ferry earliest enough</td>
<td>4.01</td>
<td>4.03</td>
<td>3.99</td>
<td>4.06</td>
</tr>
<tr>
<td>Latest ferry late enough</td>
<td>3.52</td>
<td>3.65</td>
<td>3.70</td>
<td>3.54</td>
</tr>
<tr>
<td>Ferry sailing frequent enough</td>
<td>3.54</td>
<td>3.65</td>
<td>3.76</td>
<td>3.49</td>
</tr>
<tr>
<td>Ability to get onto desired ferry</td>
<td>3.85</td>
<td>3.92</td>
<td>4.04</td>
<td>3.75</td>
</tr>
<tr>
<td>Ability to connect with other sailings (based on those connecting)</td>
<td>3.35</td>
<td>3.34</td>
<td>3.15</td>
<td>3.26</td>
</tr>
<tr>
<td>Ferry departing on time</td>
<td>3.80</td>
<td>3.95</td>
<td>4.05</td>
<td>3.71</td>
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</tbody>
</table>

### Safety

<table>
<thead>
<tr>
<th>Safety</th>
<th>Total</th>
<th>Larger Routes</th>
<th>Route</th>
<th>Smaller Routes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>30</td>
</tr>
<tr>
<td>Safety of ferry operations</td>
<td>4.20</td>
<td>4.24</td>
<td>4.30</td>
<td>4.13</td>
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</table>

### OVERALL VALUE

<table>
<thead>
<tr>
<th>Value for money of fares</th>
<th>Total</th>
<th>Larger Routes</th>
<th>Route</th>
<th>Smaller Routes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.93</td>
<td>2.98</td>
<td>3.06</td>
<td>2.91</td>
</tr>
<tr>
<td>TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal - All Waves 2013 -</td>
<td>Terminals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>OVERALL EXPERIENCE</strong></td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trip overall</td>
<td>4.17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TERMINAL EXPERIENCE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terminal overall</td>
<td>4.08</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outside appearance of the terminal</td>
<td>4.06</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ticket Purchase</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Efficiency of the transaction</td>
<td>4.45</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff courtesy</td>
<td>4.46</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clarity of staff directions</td>
<td>4.40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Food &amp; Beverage Services at the Terminal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food beverages offered</td>
<td>3.62</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td>3.09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gift Shop/ News Stand at the Terminal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety/ selection of merchandise</td>
<td>3.86</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td>3.39</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outdoor Market Area at the Terminal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variety/ selection of merchandise</td>
<td>3.59</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td>3.33</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other Terminal Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clarity of Public address system</td>
<td>3.59</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Announcements when you need to be informed</td>
<td>3.81</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall look &amp; décor inside terminal</td>
<td>3.89</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usefulness of TV info screens</td>
<td>3.73</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of washrooms</td>
<td>4.07</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleanliness of washrooms</td>
<td>3.98</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procedures for loading</td>
<td>4.06</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionalism of terminal staff</td>
<td>4.19</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Foot Passenger Services at the Terminal</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of parking spaces</td>
<td>3.79</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking value for money</td>
<td>2.96</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ease of using passenger drop-off/ pick-up area</td>
<td>3.96</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of seating in pre-boarding lounge at terminal</td>
<td>3.70</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comfort of seating in pre-boarding lounge at terminal</td>
<td>3.69</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cleanliness of pre-boarding lounge</td>
<td>4.02</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>OVERALL VALUE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Value for money of fares           | 2.93        |

<table>
<thead>
<tr>
<th>Terminals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tsawwassen</td>
</tr>
<tr>
<td>4.30</td>
</tr>
<tr>
<td>4.20</td>
</tr>
<tr>
<td>4.17</td>
</tr>
<tr>
<td>4.53</td>
</tr>
<tr>
<td>4.50</td>
</tr>
<tr>
<td>4.47</td>
</tr>
<tr>
<td>3.72</td>
</tr>
<tr>
<td>3.22</td>
</tr>
<tr>
<td>4.02</td>
</tr>
<tr>
<td>3.50</td>
</tr>
<tr>
<td>3.86</td>
</tr>
<tr>
<td>3.46</td>
</tr>
<tr>
<td>3.59</td>
</tr>
<tr>
<td>3.82</td>
</tr>
<tr>
<td>3.97</td>
</tr>
<tr>
<td>3.78</td>
</tr>
<tr>
<td>4.10</td>
</tr>
<tr>
<td>3.99</td>
</tr>
<tr>
<td>4.13</td>
</tr>
<tr>
<td>4.20</td>
</tr>
<tr>
<td>4.10</td>
</tr>
<tr>
<td>2.97</td>
</tr>
<tr>
<td>4.14</td>
</tr>
<tr>
<td>3.47</td>
</tr>
<tr>
<td>3.63</td>
</tr>
<tr>
<td>3.96</td>
</tr>
<tr>
<td>3.05</td>
</tr>
</tbody>
</table>
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 are given a longer follow-up survey to complete after they disembark and leave the terminal area. The completed survey is returned in a postage pre-paid envelope. Respondents are instructed to complete the survey within 48 hours of receiving it to ensure top-of-mind experiences are recorded.

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

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

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

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

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

<table>
<thead>
<tr>
<th>Route Description</th>
<th>Screeners</th>
<th>Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1: Tsawwassen-Swartz Bay</td>
<td>1,701</td>
<td>712</td>
</tr>
<tr>
<td>Route 2: Horseshoe Bay-Departure Bay</td>
<td>2,178</td>
<td>830</td>
</tr>
<tr>
<td>Route 3: Horseshoe Bay-Langdale</td>
<td>1,301</td>
<td>512</td>
</tr>
<tr>
<td>Route 30: Tsawwassen-Duke Point</td>
<td>1,526</td>
<td>739</td>
</tr>
<tr>
<td>Route 4: Swartz Bay-Fulford Harbour, Saltspring Island</td>
<td>1,036</td>
<td>482</td>
</tr>
<tr>
<td>Route 19: Departure Bay–Descanso Bay, Gabriola Island</td>
<td>1,269</td>
<td>525</td>
</tr>
<tr>
<td>Route 5/9: Southern Gulf Islands</td>
<td>2,188</td>
<td>1,152</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>11,199</strong></td>
<td><strong>4,952</strong></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th></th>
<th>Screeners Actual (11,199) %</th>
<th>Screeners Weighted (11,199) %</th>
<th>Returns Actual (4,952) %</th>
<th>Returns Weighted (4,952) %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Weekend</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Route: 1</td>
<td>5</td>
<td>13</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>Route: 2</td>
<td>6</td>
<td>8</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Route: 3</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Route: 30</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Route: 4</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Route: 19</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Route: 5/9</td>
<td>6</td>
<td>2</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td><strong>Weekday</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Route: 1</td>
<td>10</td>
<td>24</td>
<td>10</td>
<td>26</td>
</tr>
<tr>
<td>Route: 2</td>
<td>14</td>
<td>15</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Route: 3</td>
<td>8</td>
<td>11</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>Route: 30</td>
<td>10</td>
<td>6</td>
<td>11</td>
<td>7</td>
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<tr>
<td>Route: 4</td>
<td>7</td>
<td>3</td>
<td>7</td>
<td>3</td>
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<tr>
<td>Route: 19</td>
<td>7</td>
<td>4</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Route: 5/9</td>
<td>13</td>
<td>4</td>
<td>16</td>
<td>6</td>
</tr>
</tbody>
</table>
Data Collection

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

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

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

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 2013.

Response Rates

<table>
<thead>
<tr>
<th>Route</th>
<th>All Waves '13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 1</td>
<td>42%</td>
</tr>
<tr>
<td>Route 2</td>
<td>38%</td>
</tr>
<tr>
<td>Route 3</td>
<td>39%</td>
</tr>
<tr>
<td>Route 30</td>
<td>48%</td>
</tr>
<tr>
<td>Route 4</td>
<td>47%</td>
</tr>
<tr>
<td>Route 19</td>
<td>41%</td>
</tr>
<tr>
<td>Route 5/9</td>
<td>53%</td>
</tr>
<tr>
<td>Overall response</td>
<td>44%</td>
</tr>
</tbody>
</table>

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

Tolerance Limits – All Waves 2013

<table>
<thead>
<tr>
<th>Sample Size</th>
<th>Approximate Tolerance Limits % Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Screeners</td>
<td>11,199</td>
</tr>
<tr>
<td>Total Returns</td>
<td>4,952</td>
</tr>
</tbody>
</table>

**Individual Route Returns**

- Route 1: 712, +/- 3.7%
- Route 2: 830, +/- 3.4%
- Route 3: 512, +/- 4.3%
- Route 30: 739, +/- 3.6%
- Route 4: 482, +/- 4.5%
- Route 19: 525, +/- 4.3%
- Route 5/9: 1,152, +/- 4.3%