

Customer Satisfaction Tracking Annual Report 2005

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., known as 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 3 years are shown on the graphs, to allow for easy comparison.

In addition to graphs showing the overall scores, this report includes detailed tables by route - in the Appendix - showing satisfaction scores for each of the 69 service attributes for 2005. The Appendix also includes detailed satisfaction scores for each of the 28 terminal-related attributes, shown separately for each of the main terminals.

Methodology

Results are based on a comprehensive two-phased research approach. First a random sample of passengers was intercepted onboard using a screener questionnaire to collect basic information about frequency of travel on BC Ferries, purpose of trip, area of residence, origin/destination, and standard demographic data. Immediately following this screener, passengers were given a separate longer questionnaire, which they were asked to complete *after* they disembarked and left the terminal.

A total of 14,285 screener interviews were conducted and 5,431 longer questionnaires were completed and returned to the research firm. Interviews were distributed across different routes, both larger and smaller routes, during three different times of the year; peak season, shoulder season and low season. A sample of eight designated routes was included in the survey, representing almost 80% of

the annual passenger traffic carried by BC Ferries. 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 69 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 86% of passengers in 2005 reported to be satisfied overall with their experience travelling on BC Ferries, very similar to the satisfaction level measured in 2004. On a five-point scale, an average score of 4.1 was achieved.

Satisfaction Before Arriving at Terminal

- Ratings of BC Ferries Web site have improved, increasing for both the *usefulness of the website*, and the *ease of using online reservations*.
- Passengers making phone contact with BC Ferries continue to be less complimentary of the *usefulness of BC Ferries phone service*, and specifically with *ease of using the automated system*, but ratings have improved slightly for the *automated system* compared to a year ago.
- Satisfaction levels with highway signage have improved over the year at all terminals with the exception of Duke Point, which declined just slightly to 4.1 from the high 4.2 score last year. Passengers continue to be most critical of signage at Horseshoe Bay.

Satisfaction at the Terminal

- Overall satisfaction levels with the terminal experience are similar to a year ago, except at the Tsawwassen terminal, where ratings have strengthened significantly, to 4.1 from an average score of 3.9 in 2004 and 2003.
- Satisfaction levels continue to be high with all aspects of the ticket purchase process with no shifts from last year.
- While passengers using food and beverage services at the terminal continue to be critical of the *food/beverages offered*, and *value for money*, both have seen improvements in ratings since last year, particularly at Tsawwassen terminal.

- Overall satisfaction has increased with retail services at the terminal with *variety/selection of merchandise at the gift shop/news stand* showing a significant increase.
- Overall, foot passengers continue to be somewhat dissatisfied with many of their services. However, there are improvements in ratings with respect to *cleanliness of pre-boarding lounge, availability of seating, comfort of seating and usefulness of TV info screens*. For *ease of using passenger drop-off/pick-up area, availability of parking spaces, and parking value for money*, ratings had declined significantly in 2004; this year the decline has been reversed and ratings have returned to their 2003 levels.
- Satisfaction levels with other terminal services have been quite consistent, with a slight improvement in some areas; namely, *cleanliness of washrooms, and overall look and décor inside the terminal*.

Satisfaction Onboard

- Onboard satisfaction maintained a high rating of 4.0 this year, same as in 2004 and 2003.

[NOTE: For route-specific results that follow, please refer to page 8 for all the route number codes]

- A total of 86% of passengers in 2005 were satisfied with their overall experience onboard, similar to 2004 levels (85%). Scores are similar on each route with the following exceptions:
 - Route 1: an increase in the 'very satisfied' top box score to 26%, from a level of 20% in 2004, with a resulting increase in the overall average score to 4.2 out of 5 from 4.1 last year;
 - Route 4: decrease from 81% satisfied in 2004 to 75% satisfied this year;
 - Routes 5/9: decrease from 82% satisfied last year to 77% satisfied this year.
- Satisfaction levels continue to be highest with the *staff courtesy* and *variety/selection of merchandise* in the gift shop/news stand, with no significant changes from last year. Ratings continue to be lower for *ease of moving around inside the shop*, and for *value for money*, but ratings have improved for *ease of moving around inside*.
- Food services continue to perform well for *staff courtesy*, *cleanliness of seating area*, and *availability of seating*. Satisfaction levels are still lower with respect to *comfort of seating*, *length of time in line*, *food/beverages offered*, and *value for money*. However, there has been some improvement in ratings for *food/beverage offered* and continued improvement in ratings for *length of time in line*.
- Passengers continue to be satisfied with the *availability of washrooms* with no change in ratings from last year, but are more critical of the *cleanliness*, although *cleanliness* has been gradually improving.
- Travellers continue to be relatively satisfied with the *comfort* and *cleanliness of indoor lounge seating* with no change in ratings.
- In terms of other onboard facilities and services, satisfaction levels continue to be reasonably high; passengers are most complimentary of the *professionalism of onboard staff* and less satisfied with the *video arcade*, *play area for children*, and *ease of access for people with disabilities*, with no movement in ratings.

Satisfaction with Sailing Schedules

- Some aspects of the sailing schedule still are not meeting passengers' requirements; however, the gains made in 2004 with respect to *on-time departures* have been sustained, with further improvement in the 'very satisfied' top box score (24% this year compared with 20% a year ago).
- Passengers continue to be most critical of *sailing frequency*, *last ferry late enough*, and with *ability to make connections* (although ratings have improved for both *connections* and *last ferry late enough*).

[NOTE: Refer to page 8 or page 30 for Route number codes]

- Individually, each route (except 3 and 19) has seen an increase in satisfaction with *on-time departures*; the most significant improvement was on route 2 which went from 3.3 out of 5 last year to 3.7 this year.
- Satisfaction with *on-time departure* also improved for route 5/9 but continues to score low compared with all other routes.

Satisfaction with Safety

- Perceptions of the *safety of the ferry operations* continue to be quite strong on all routes, with no significant changes over the year.

Satisfaction with Overall Value

- Satisfaction levels continue to be low with perceived *value for money of the fares*, with 28% reporting to be dissatisfied, an increase of four percentage points over the year – this seems to be attributable to the introduction of a fuel surcharge.

Key Conclusions

Overall passenger satisfaction levels have been maintained over the year but with improvements in several areas including:

- Usefulness of the Web site;
- Ease of using on-line reservations;
- Slight improvement in ease of using automated phone system;
- Highway signage;
- Food/beverage services and gift shop/ news stand at Tsawwassen and Swartz Bay terminals;
- Overall look and décor inside the Tsawwassen and Swartz Bay terminals;
- Cleanliness of pre-boarding lounge for foot passengers;

- Availability and comfort of seating for foot passengers;
- Usefulness of TV info screens;
- Cleanliness of washrooms both at the terminal and onboard;
- Ease of moving around onboard gift shop;
- Food/beverage offered on board;
- Length of time in line for food service;
- Ability of connect with other sailings.

The gains made in 2004 with respect to on-time departures have been maintained and, in fact, the average length of delay is gradually declining. A slightly higher number than in 2004 were unable to board their desired sailing, but average terminal wait times have been stable.

BC Ferries also continues to perform well on:

- Staff in all areas;
- Efficiency of ticket purchase transaction;
- Procedures for loading/unloading;
- Availability of seating in food services area;
- Cleanliness of onboard lounge and food services seating areas;
- Availability of onboard washrooms;
- Availability of tourist and travel info;
- Earliest ferry early enough;
- Safety of ferry operations and safety of loading/unloading.

Areas of opportunity to enhance the customer experience include:

Terminal

- Ease of using the automated phone system;
- Food/beverages offered at terminals;
- Value for money of food/beverages at terminals;
- Value for money of merchandise at terminal(gift shop/ news stand/ outdoor market area);
- Variety selection of merchandise at terminal (including outdoor market);
- Clarity of public address system;
- Ease of using passenger drop-off / pick-up area;
- Availability of parking spaces;
- Parking value for money;
- Comfort of seating in pre-boarding lounge.

On-board

- Ease of moving inside gift shop/ news stand;
- Value for money of gift shop/ news stand/ food services;
- Length of time in line for food services;
- Food/ beverages offered;
- Value for money of food services;
- Play area for children;
- Video arcade;
- Ease of access for those with disabilities.

Schedules

- Frequent enough;
- Latest ferry late enough;
- Ability to connect.

Overall

- Value for money of fares

Detailed Findings

The following section shows the detailed findings from the study. It graphically displays the satisfaction scores for each of the sixty-nine 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 - 2005	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay–Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

Overall Satisfaction with BC Ferries

A total of 86% of passengers in 2005 reported to be satisfied overall with their experience travelling on BC Ferries, very similar to the satisfaction level measured in 2004 (88%). On a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied' an average score of 4.1 is achieved.

[NOTE: Refer to page 8 for route number codes]

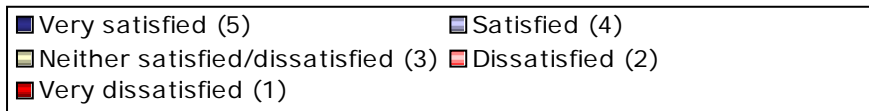
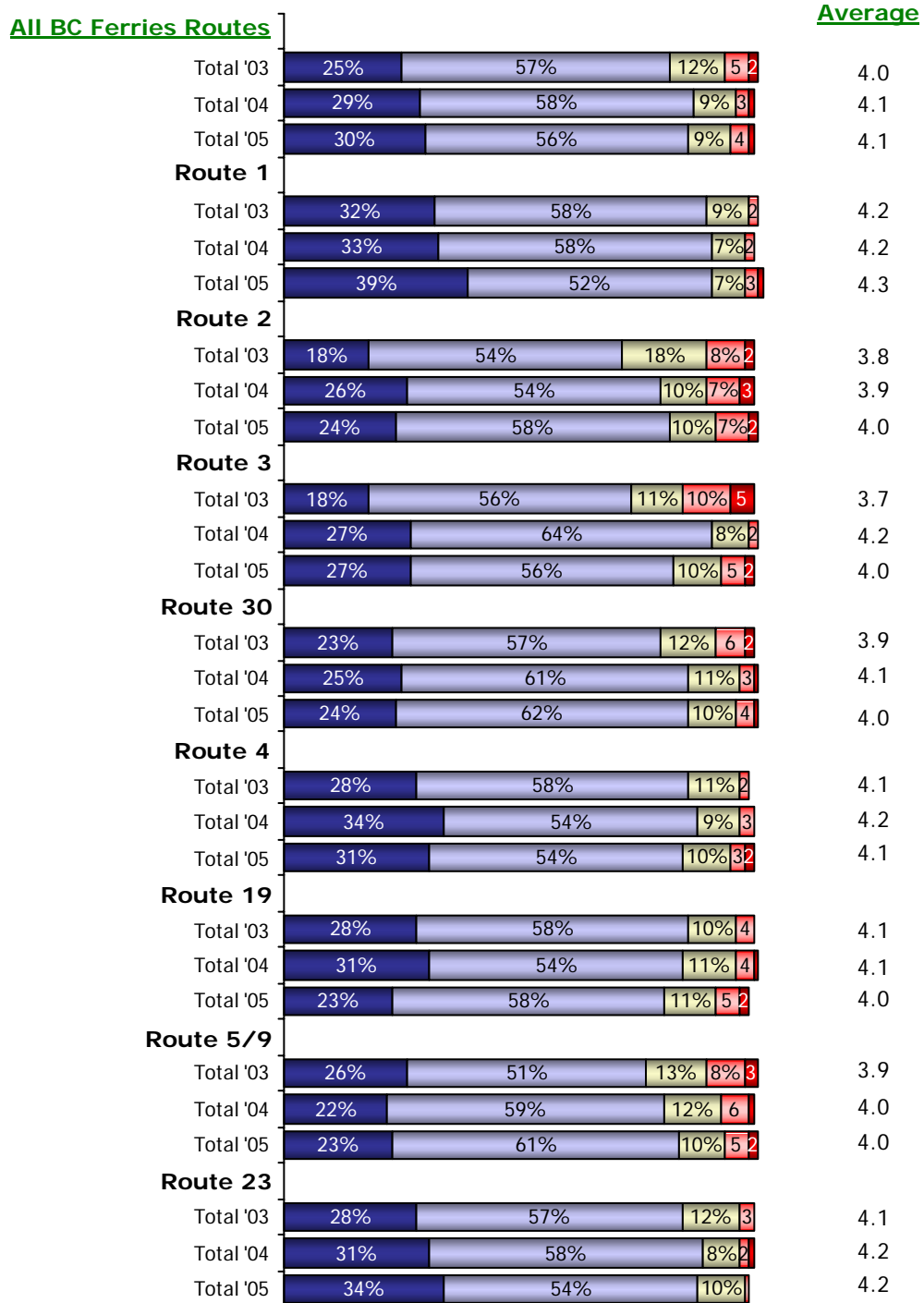
Overall satisfaction levels have strengthened on:

- Route 2 (82% satisfied compared to 80% in 2004)

Satisfaction has remained at a high level on Route 1 (91% satisfied).

Satisfaction levels are relatively unchanged on all other routes with the exception of Route 3. Ratings had improved considerably in 2004 on this route and these higher satisfaction levels were maintained for much of 2005 except during the peak season. As a result, the overall satisfaction level for 2005, 4.0, is lower than it was a year ago, 4.2.

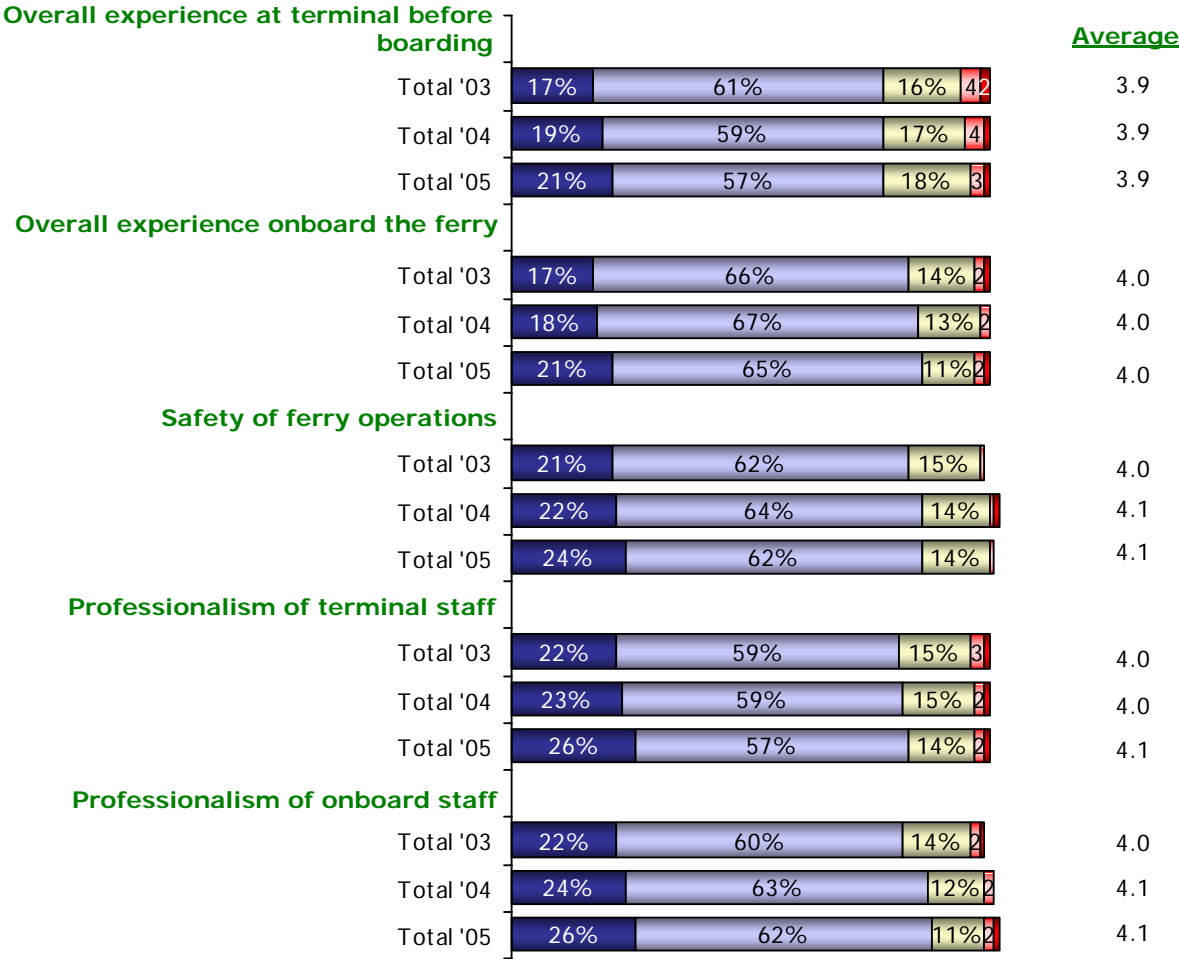
Overall Satisfaction Level with Recent Experience Travelling with BC Ferries



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

The following chart summarizes the results from overall measures of each main point of contact and with BC Ferries. Overall, results are similar to those obtained in 2004. Further analysis of each measure is provided in subsequent sections.

Summary of Main Satisfaction Scores



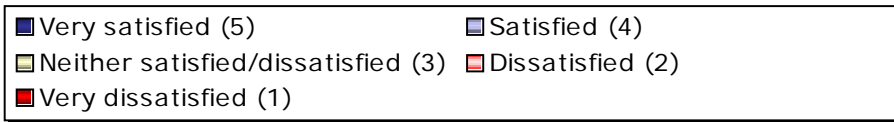
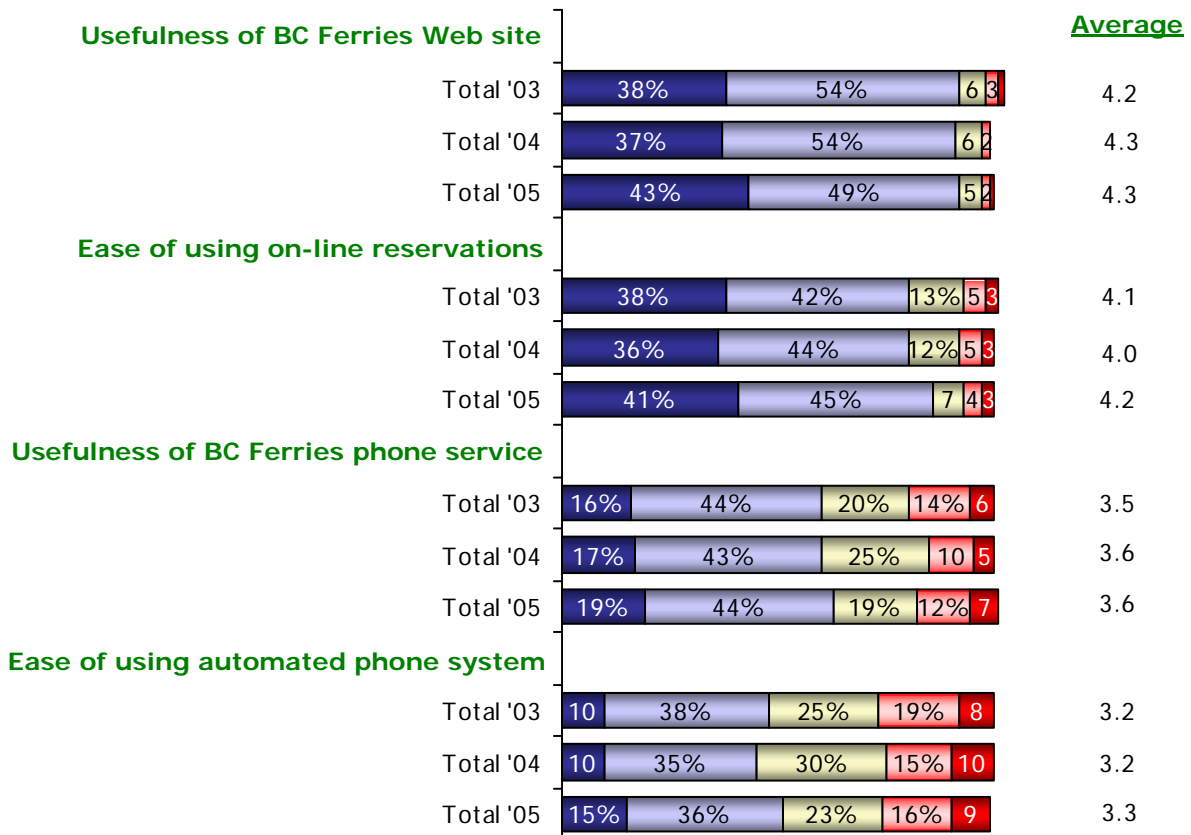
Before Arriving at Terminal

Web site and Phone Contact

Ratings of BC Ferries Web site have improved, increasing for both the *usefulness of the website*, and the *ease of using online reservations*.

Passengers making phone contact with BC Ferries continue to be less complimentary of the *usefulness of BC Ferries phone service*, and specifically with *ease of using the automated system*, but ratings have improved slightly for the *automated system* compared to a year ago.

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



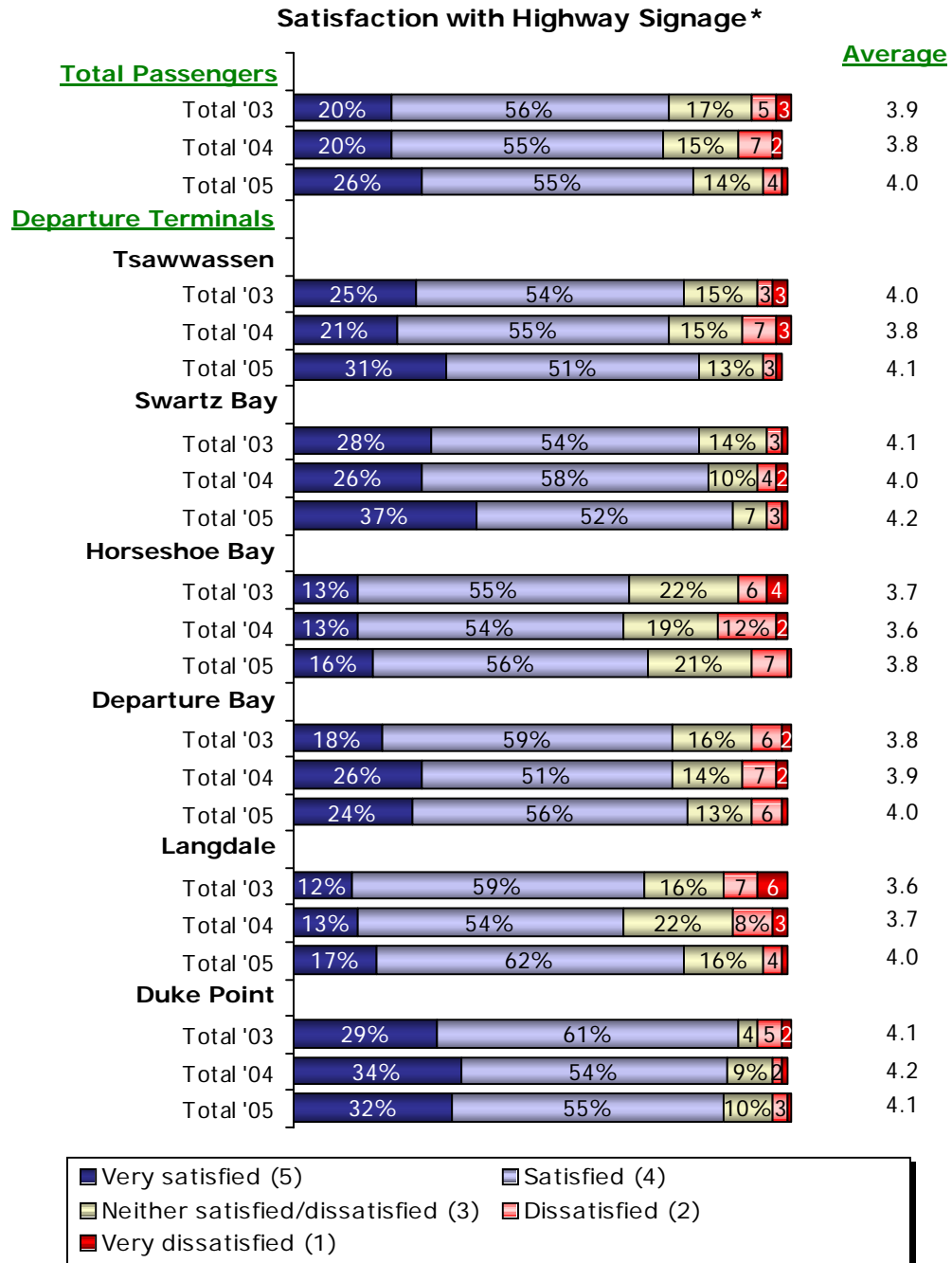
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* 55% usage Web site, 30% for on-line reservations

** 30% usage phone service, 26% for automated system

Highway Signage

Satisfaction levels with highway signage have improved over the year at all terminals with the exception of Duke Point, which declined just slightly to 4.1 from the high 4.2 score last year. Passengers continue to be most critical of signage at Horseshoe Bay.



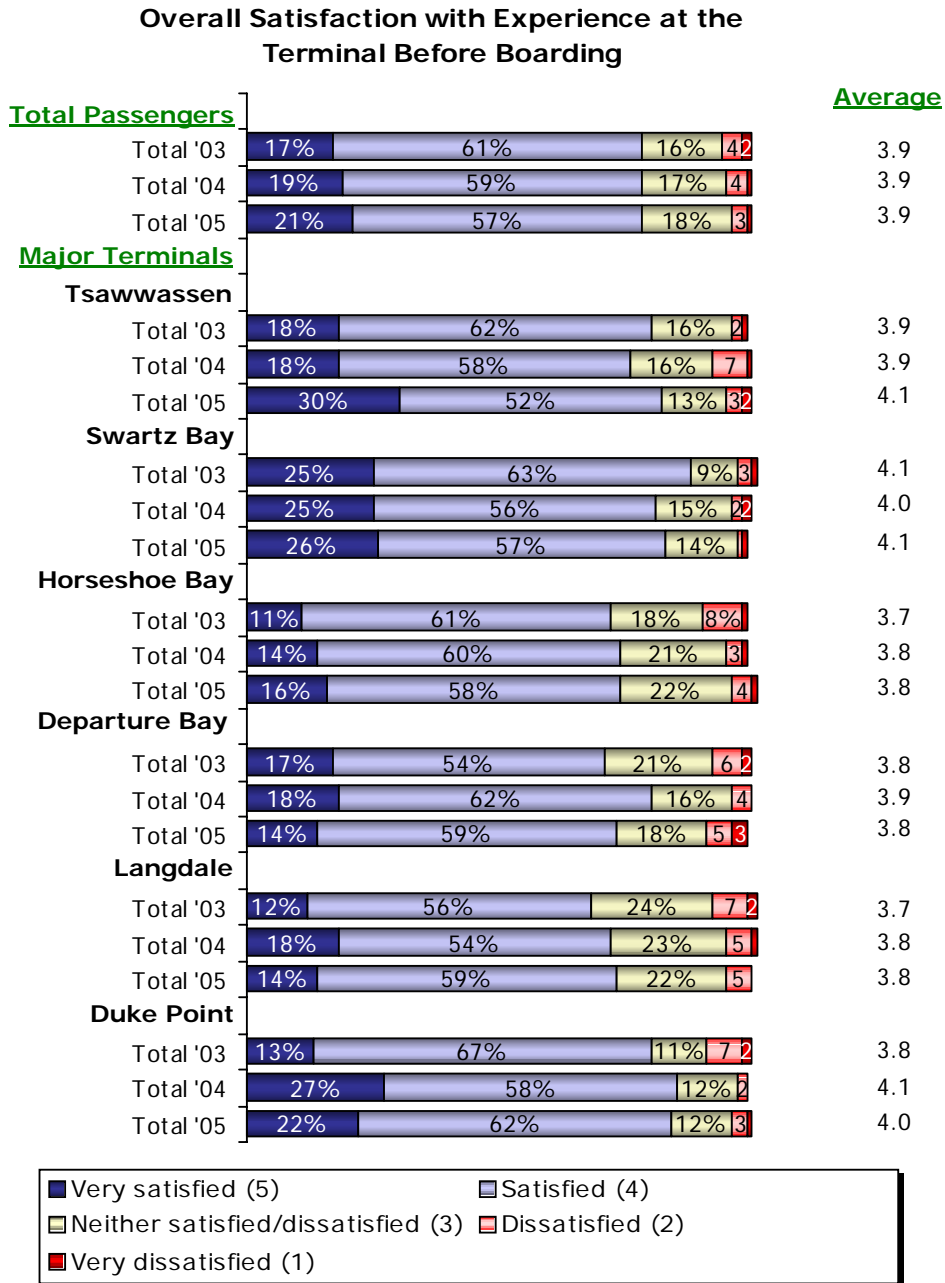
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* Usage: 74%

At the Terminal

Overall Experience at the Terminal

Overall satisfaction levels with the terminal experience are similar to a year ago, except at the Tsawwassen terminal, where ratings have strengthened significantly to 4.1 from an average score of 3.9 in 2004 and 2003.

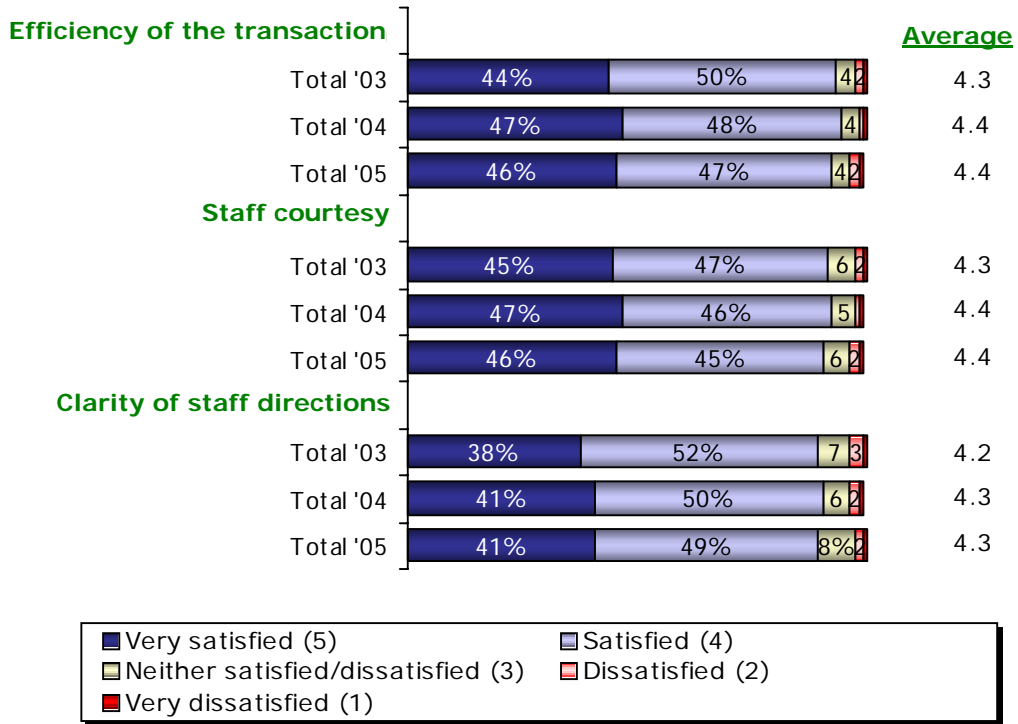


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

Ticket Purchase

Satisfaction levels continue to be high with all aspects of the ticket purchase process with no shifts from last year.

Satisfaction with Aspects of Ticket Purchase

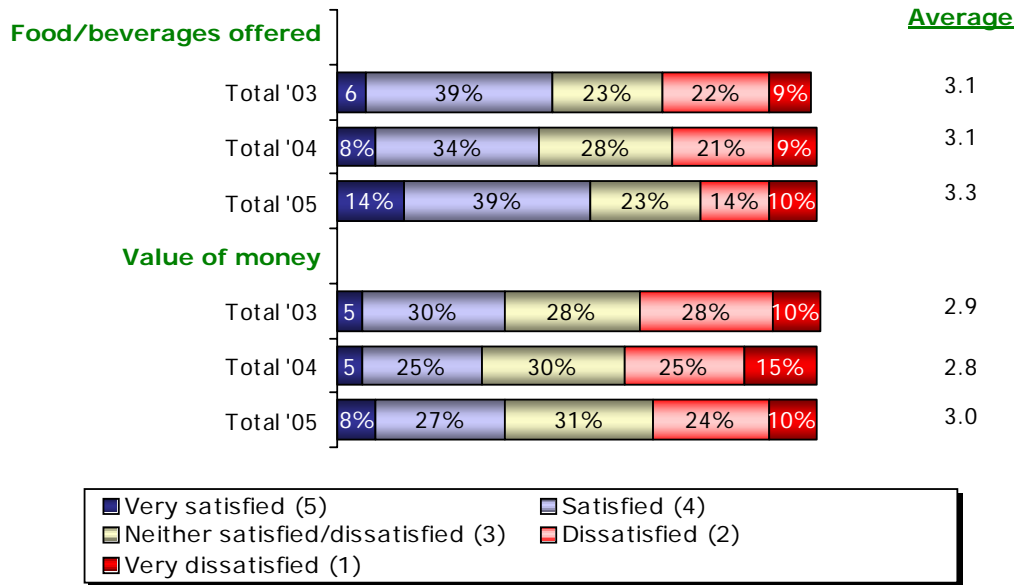


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

Food/Beverage Services at Terminal

While passengers using food and beverage services at the terminal continue to be critical of the *food/beverages offered*, and *value for money*, both have seen improvements in ratings since last year, particularly at Tsawwassen terminal.

Satisfaction with Aspects of Food and Beverage Services at Terminal*



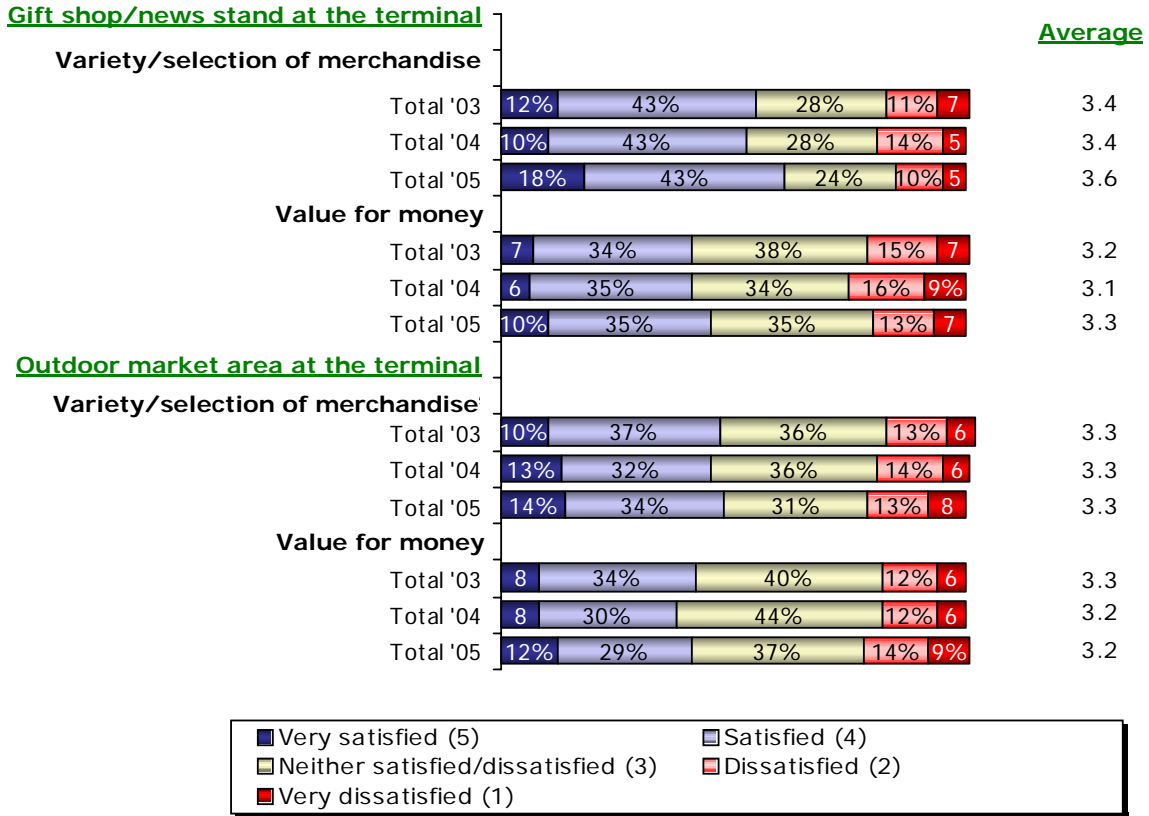
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

* 35% usage overall; excluding routes 19 and 23.

Retail Services at Terminal

Overall satisfaction has increased with retail services at the terminal with *variety/selection of merchandise at the gift shop/news stand* showing a significant increase.

Satisfaction with Aspects of Retail Services at Terminal*



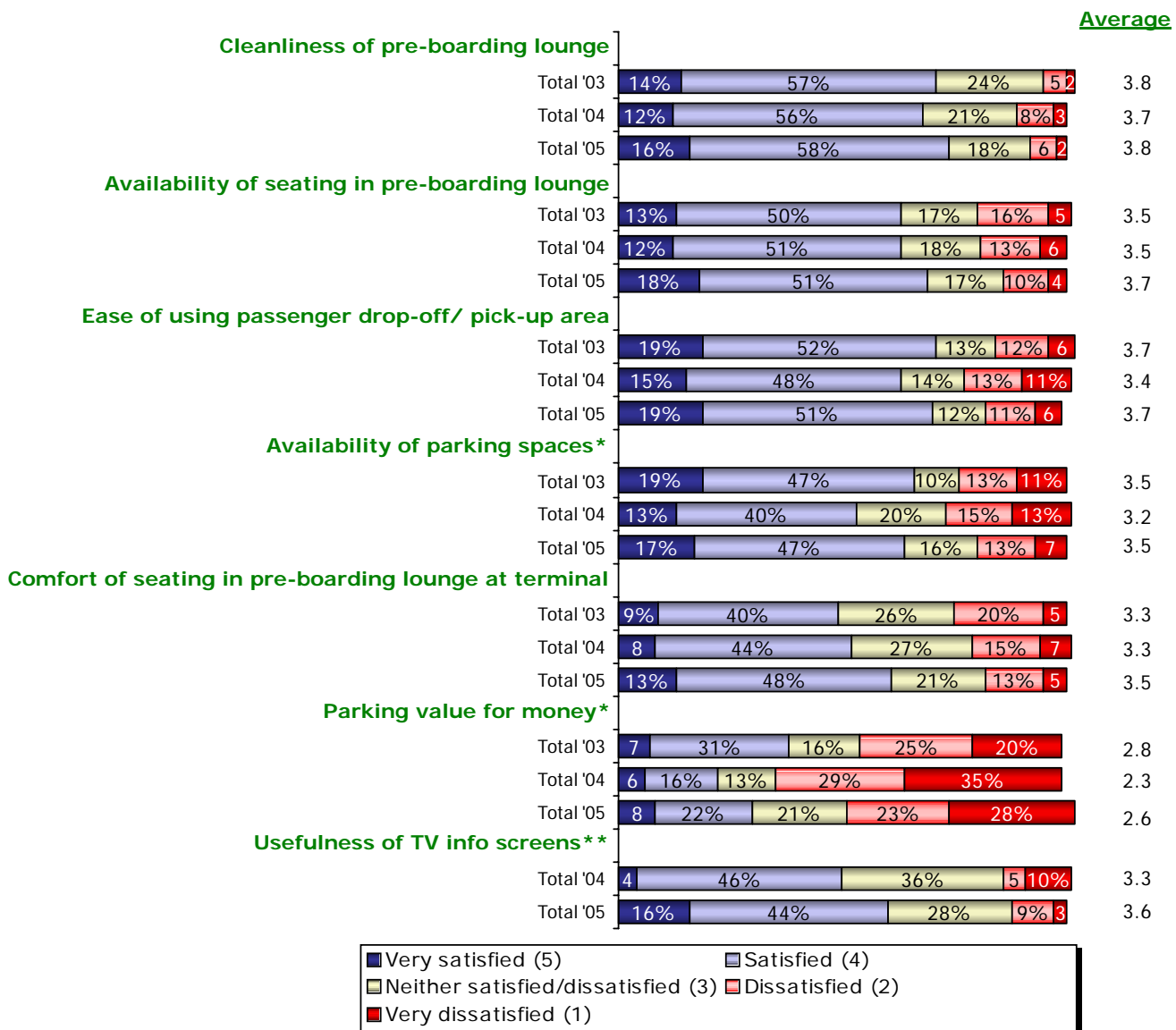
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

* 31% usage gift shop, 22% usage outdoor market; excludes route 19, and route 23.

Foot Passenger Services

Overall, foot passengers continue to be somewhat dissatisfied with many of their services. However, there are improvements in ratings with respect to *cleanliness of pre-boarding lounge, availability of seating, comfort of seating and usefulness of TV info screens*. For *ease of using passenger drop-off/pick-up area, availability of parking spaces, and parking value for money*, ratings had declined significantly in 2004; this year the decline has been reversed and ratings have returned to their 2003 levels.

Satisfaction with Foot Passenger Services*



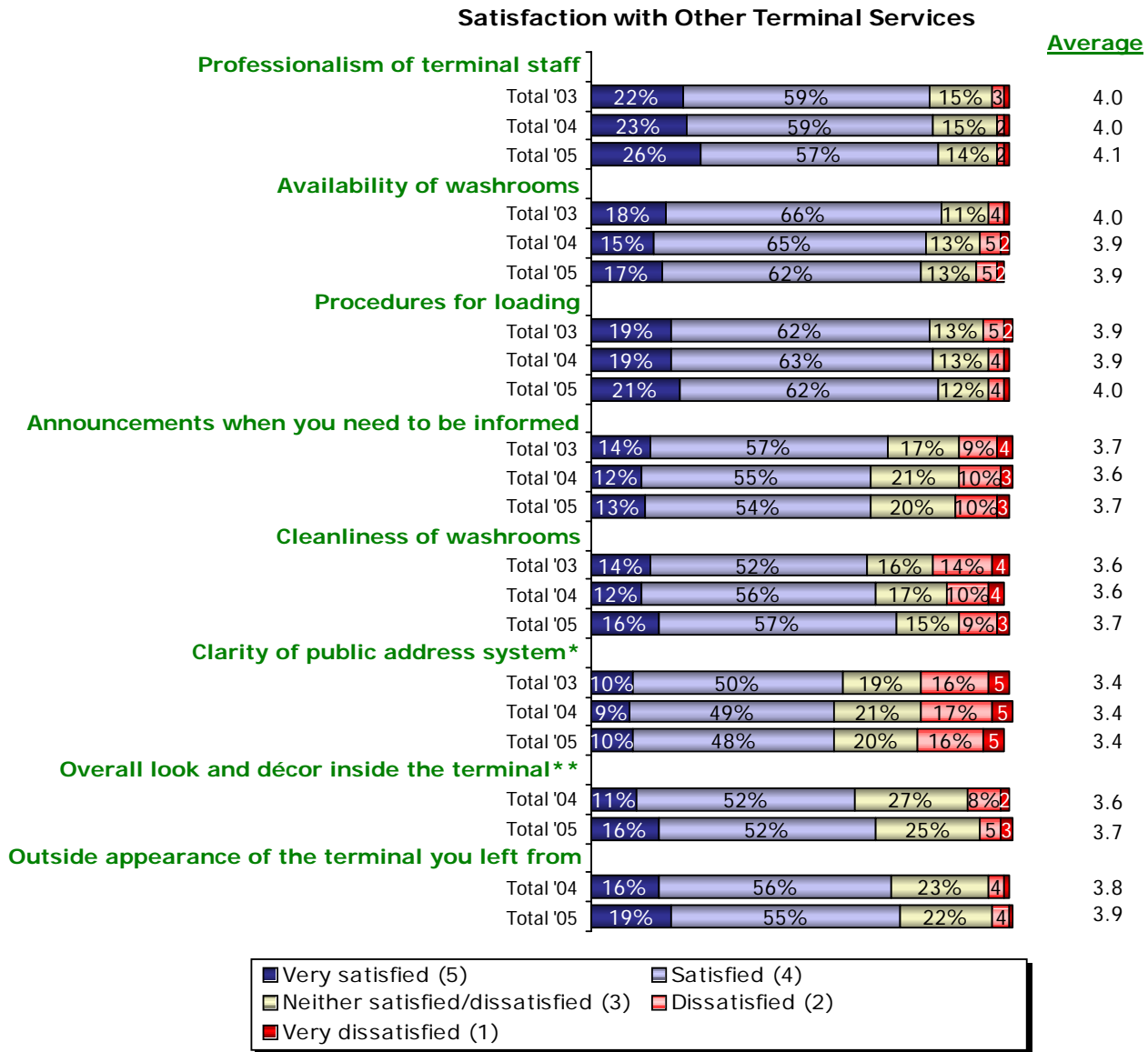
Q.3) Please rate how satisfied or dissatisfied you were with each of the following. 29% are foot passengers (including bus).

* Excludes Route 23.

** Includes Routes 1,2,3 & 30 & 4

Other Terminal Services

Satisfaction levels with other terminal services have been quite consistent, with a slight improvement in some areas; namely, *cleanliness of washrooms*, and *overall look and décor inside the terminal*.



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.
 * Excluding Route 23.
 ** Excludes Route 19 & 23.

Onboard Experience

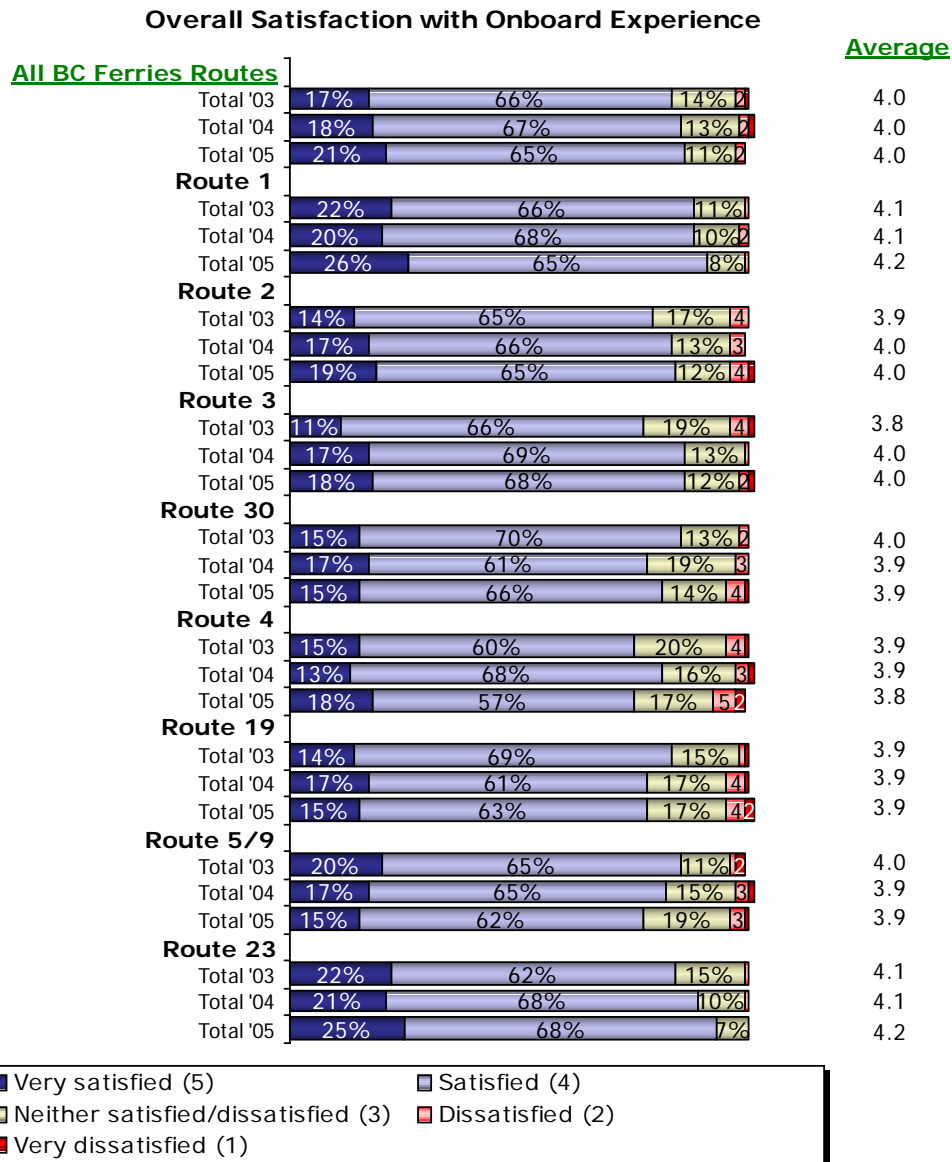
Overall Onboard Experience

Onboard satisfaction maintained a high rating of 4.0 this year, same as in 2004.

A total of 86% of passengers in 2005 were satisfied with their overall experience onboard, similar to 2004 levels (85%). Scores are similar on each route with the following exceptions:

- Route 1: an increase in the top box score (very satisfied) from 20% in 2004 to a current level of 26% and the overall average increasing from 4.1 to 4.2;
- Route 4: decrease from 81% in 2004 satisfied to 75% satisfied;
- Routes 5/9: decrease from 82% satisfied to 77% satisfied.

[NOTE: Refer to page 8 or page 30 for Route number codes]

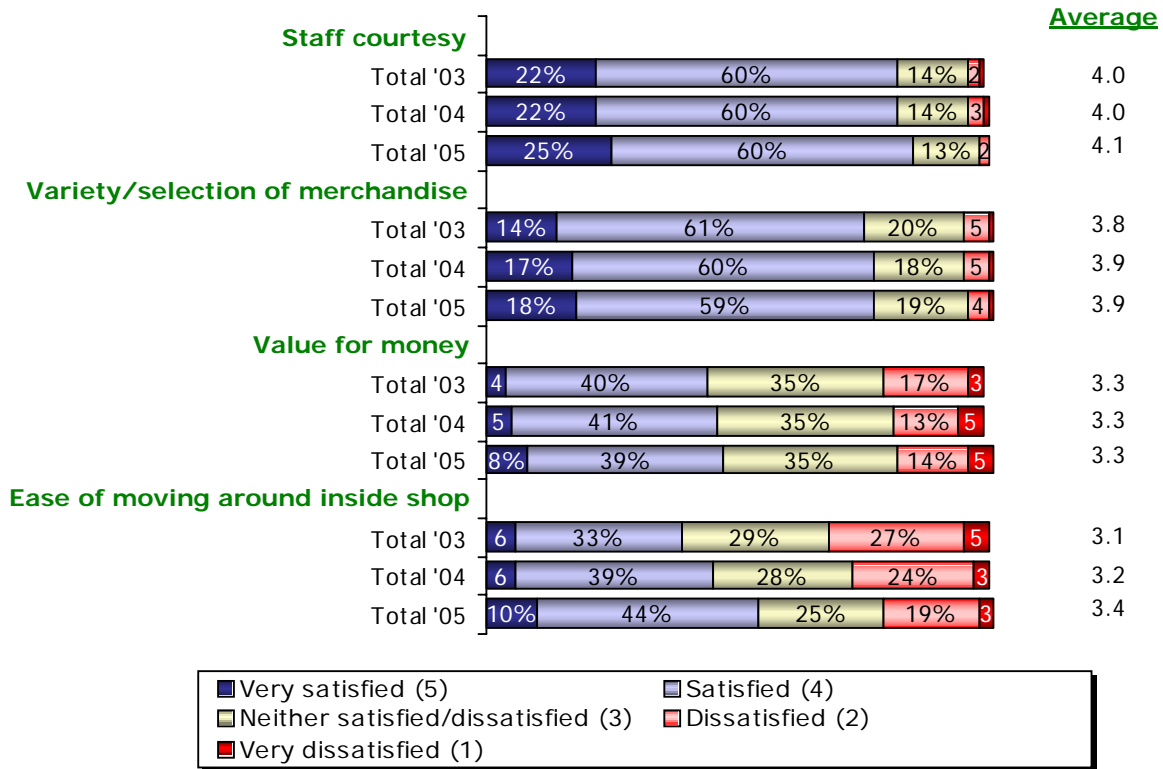


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Onboard Gift Shop/News Stand

Satisfaction levels continue to be highest with the *staff courtesy* and *variety/selection of merchandise* in the gift shop/news stand, but with no significant changes. Ratings continue to be lower for *ease of moving around inside the shop*, and for *value for money*, but ratings have improved for *ease of moving around inside*.

Satisfaction with Aspects of Gift Shop/News Stand Onboard*



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

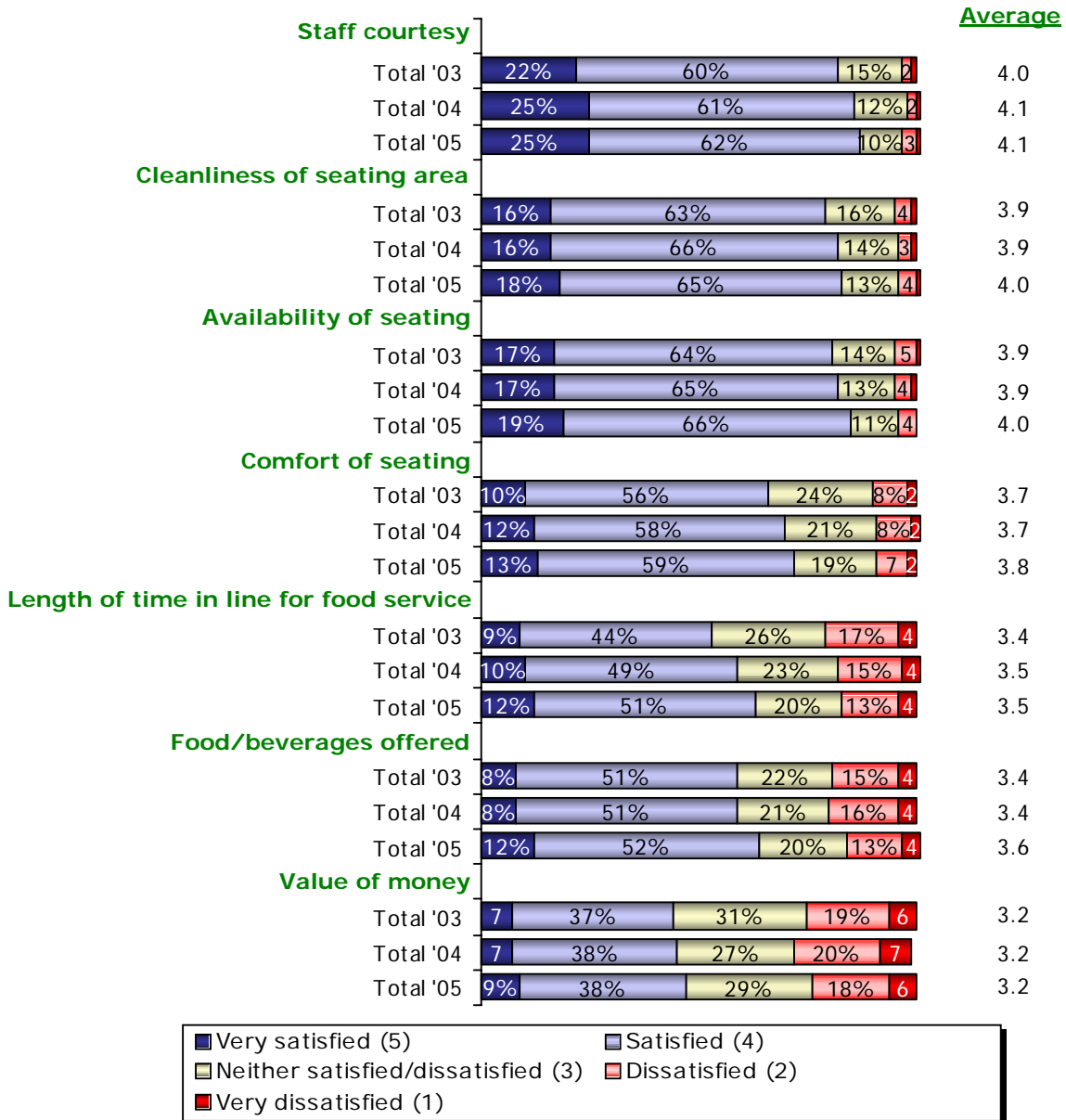
* Excludes Routes 4, 19 and 23. Otherwise usage is 56%.

Onboard Food Services

Food services continue to perform well for *staff courtesy, cleanliness of seating area, and availability of seating*. Satisfaction levels are still lower with respect to *comfort of seating, length of time in line, food/beverages offered, and value for money*.

However, there has been some improvement in ratings for *food/beverage offered* and continued improvement for *length of time in line*.

Satisfaction with Aspects of Food and Beverage Services Onboard*



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

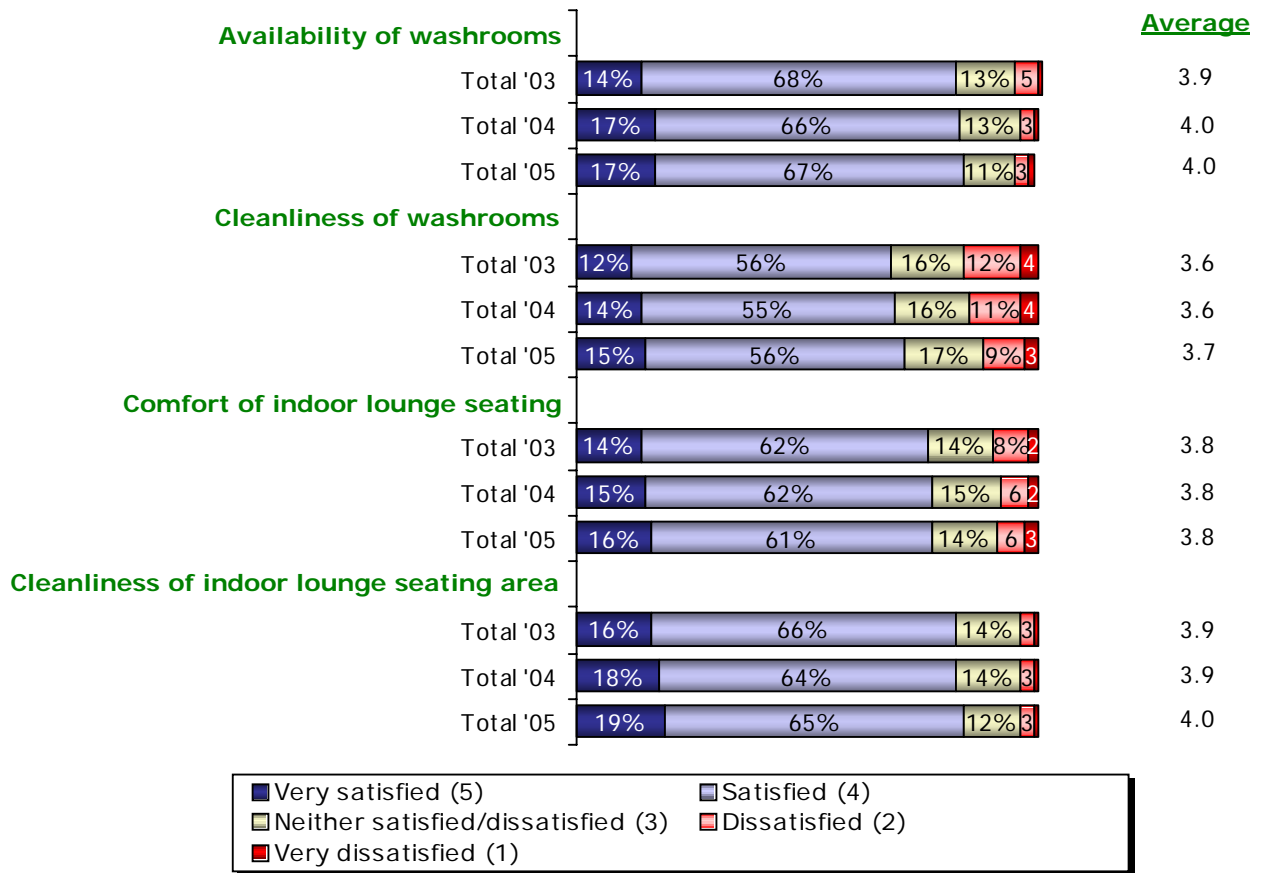
* Excludes Routes 4, 19 and 23. Usage 75%

Onboard Washrooms and Onboard Seating

Passengers continue to be satisfied with the *availability of washrooms* with no change in ratings, but are more critical of the *cleanliness*, although *cleanliness* has been gradually improving.

Travellers continue to be relatively satisfied with the *comfort and cleanliness of indoor lounge seating* with no change in ratings.

Satisfaction with Onboard Washrooms and Onboard Seating

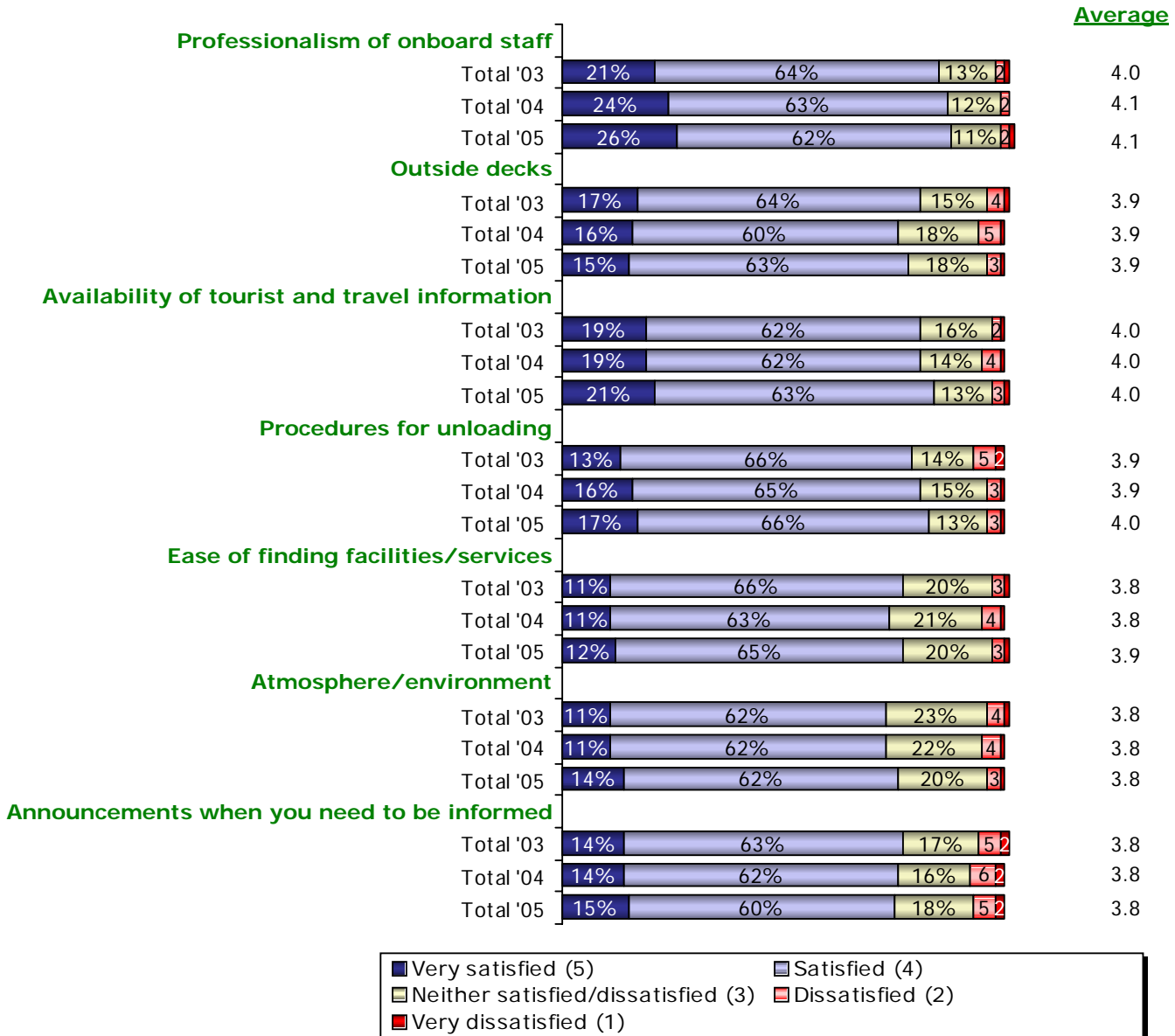


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Other Onboard Facilities/Services

In terms of other onboard facilities and services, satisfaction levels continue to be reasonably high, with passengers most complimentary of the *professionalism of onboard staff* and less satisfied with the *video arcade, play area for children and ease of access for people with disabilities*, with no movement in ratings over last year (see following page also).

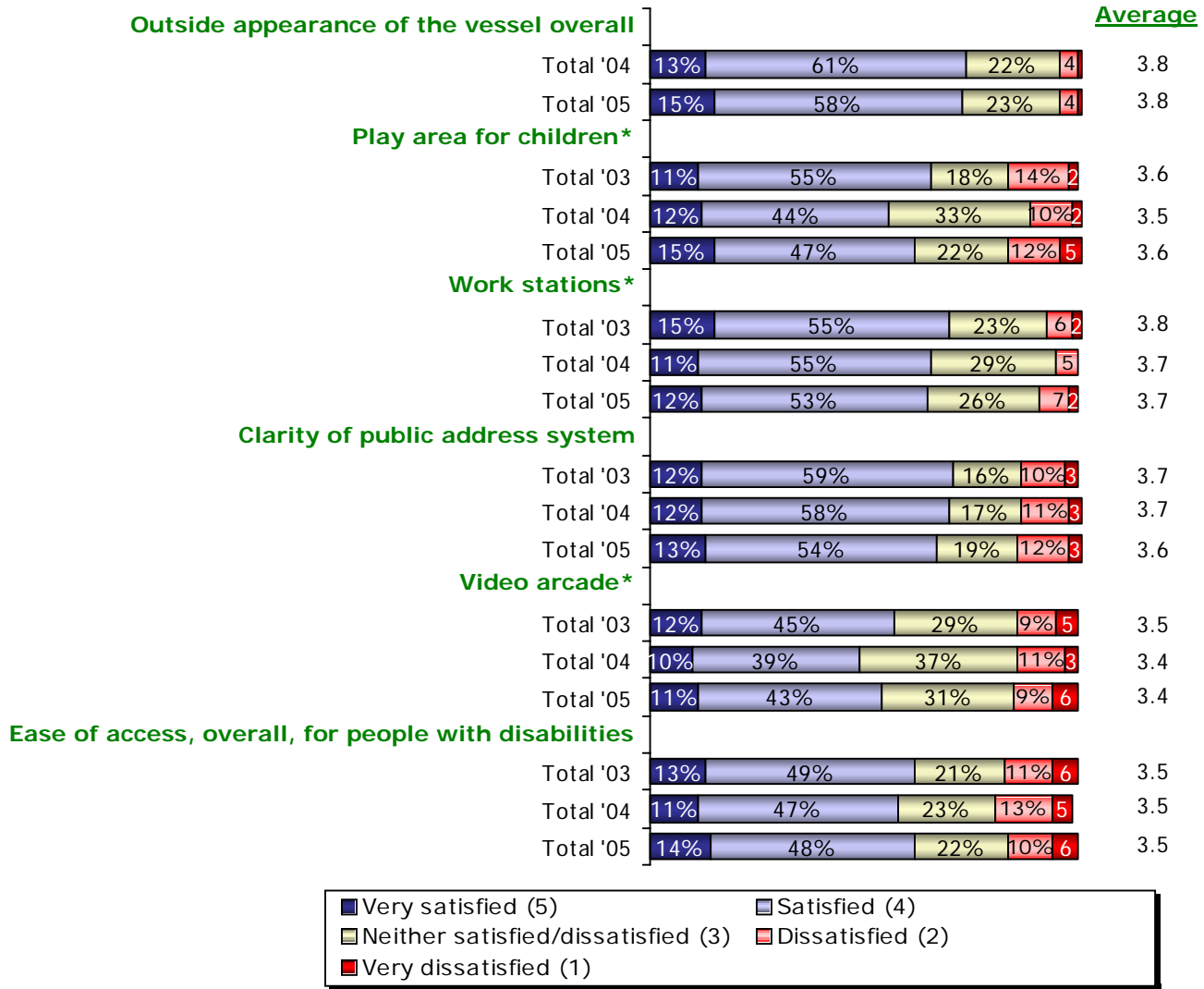
Satisfaction with Other Facilities/Services Onboard



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.

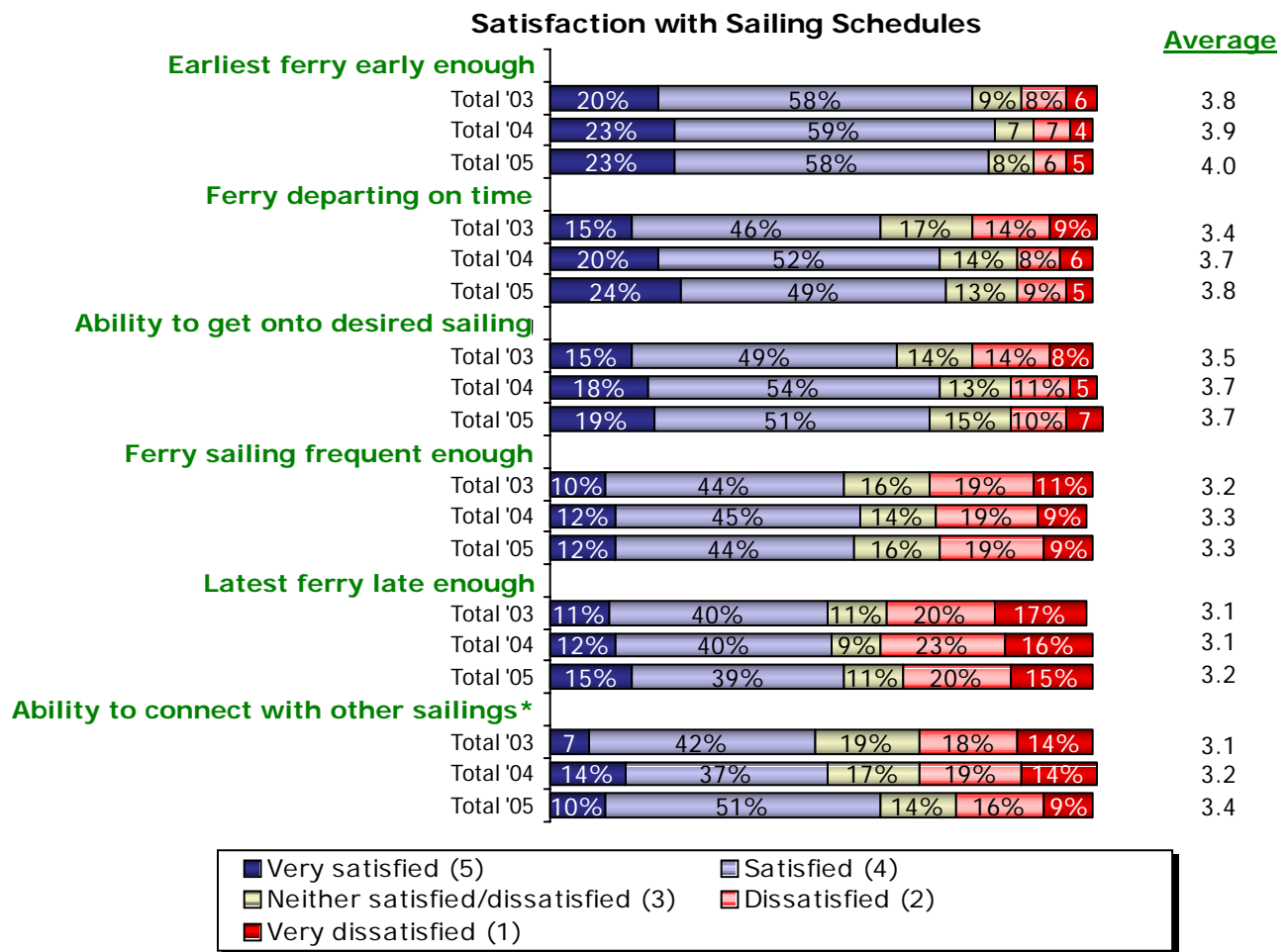
* Excludes Routes 4, 19 and 23.

Sailing Schedules

Various Aspects of Sailing Schedules

Some aspects of the sailing schedule still are not meeting passengers' requirements; however, the gains made in 2004 with respect to *on-time departures* have been sustained, with some further improvement in the top box score (24% now 'very satisfied' in contrast to 20% a year ago).

Passengers continue to be most critical of *sailing frequency*, *last ferry late enough*, and with *ability to make connections* (although ratings have improved for both connections and last ferry late enough).



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

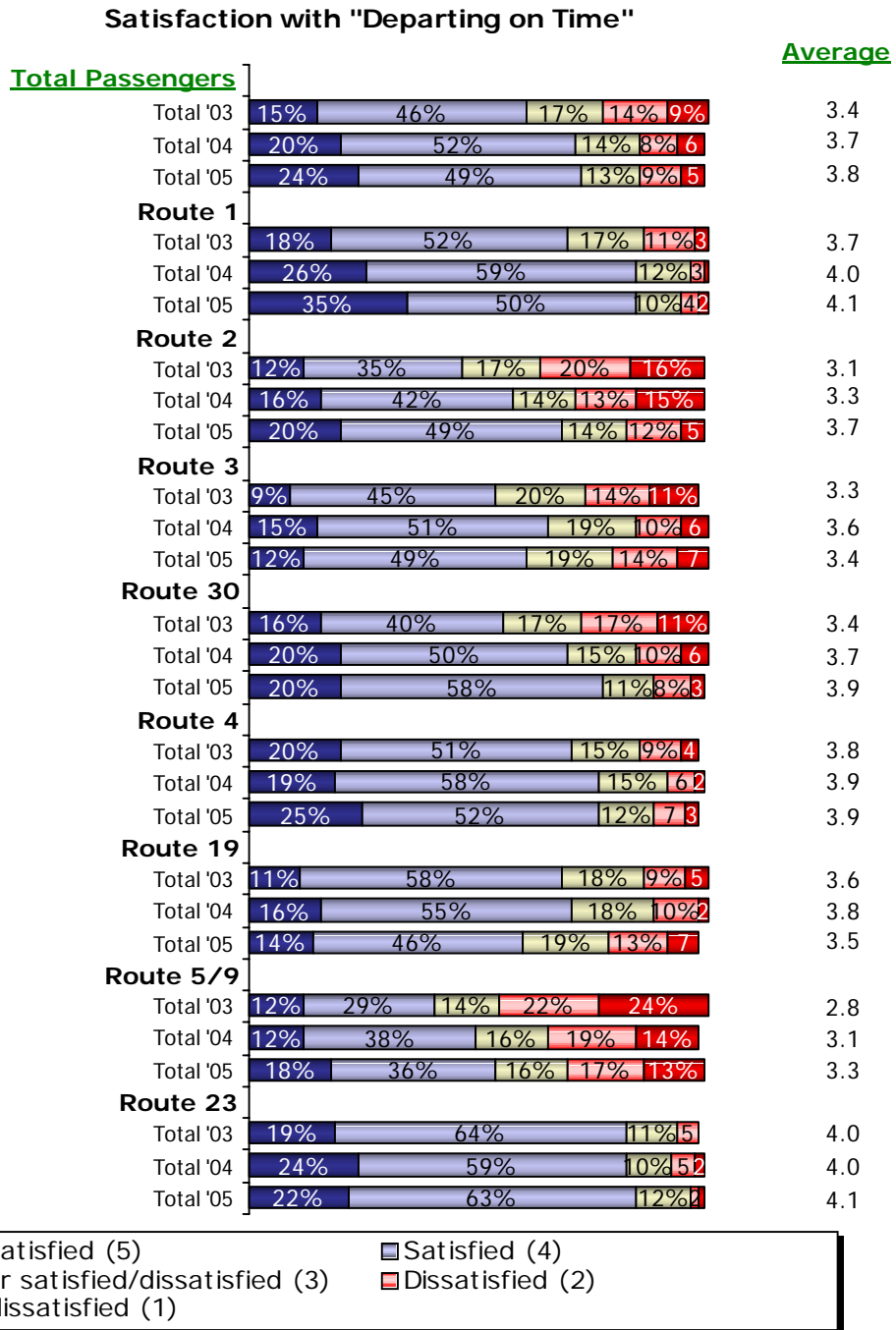
* Based on those connecting (n=136).

Departing on Time

Individually, each route (except 3 and 19) has seen an increase in *on-time departures*; the most significant improvement was on route 2 which went 3.3 out of 5 last year to 3.7 this year.

Satisfaction with *on-time departures* also improved for route 5/9 but continues to score low compared with all other routes.

[NOTE: Refer to page 8 or page 30 for Route number codes]

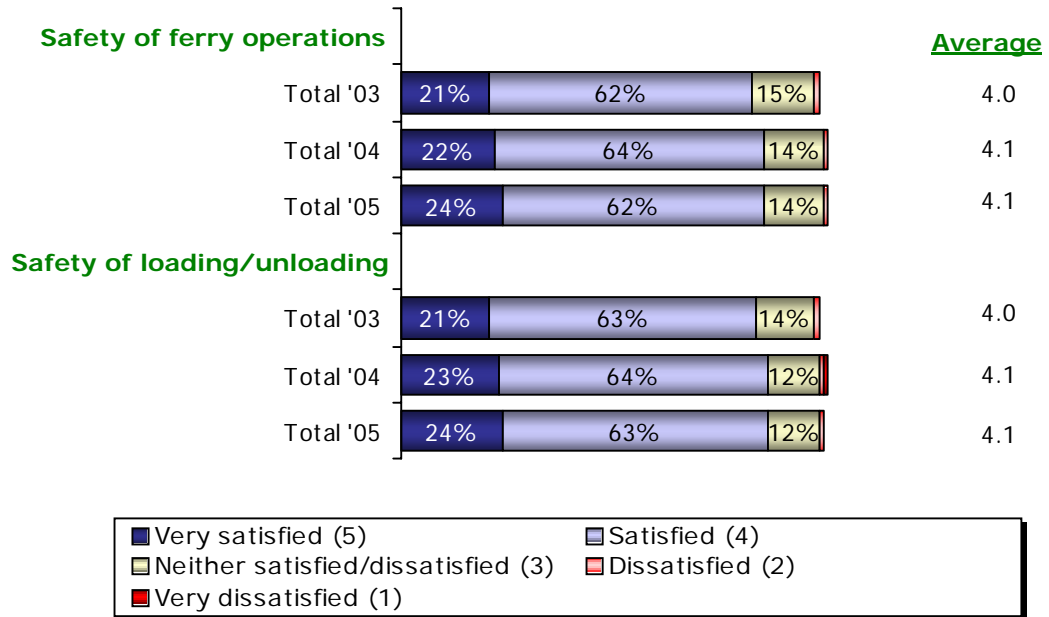


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Safety

Perceptions of the *safety of the ferry operations* continue to be quite strong on all routes, with no significant changes over the year.

Satisfaction with Aspects of Safety

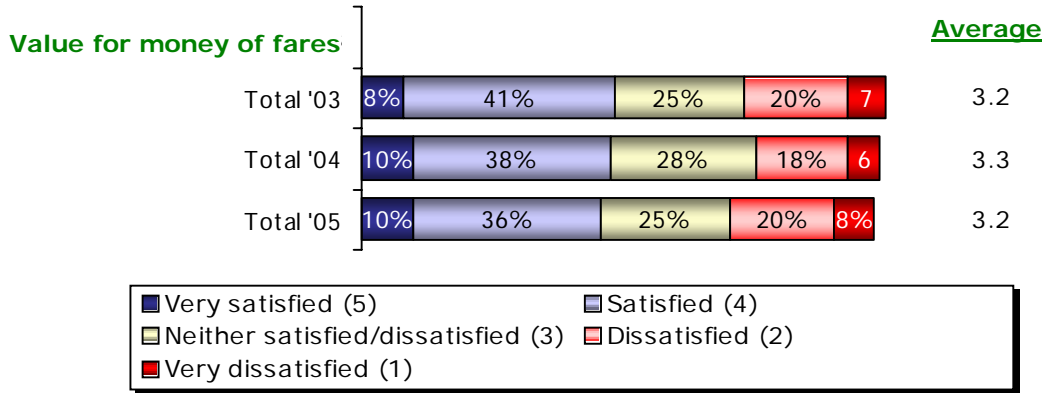


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Overall Value

Satisfaction levels continue to be low with perceived *value for money of the fares*, with 28% reporting to be dissatisfied, an increase of four percentage points over the year, - this seems to be attributable to the introduction of a fuel surcharge.

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 - 2005	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay-Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 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 2005 (see page 30 for Route Number Codes)											
	Total	Larger Routes			Route 3	Smaller Routes					
		Total	1	2		30	Total	4	19	5/9	23
OVERALL EXPERIENCE											
Trip overall	4.1	4.2	4.3	4.0	4.0	4.0	4.0	4.1	4.0	4.0	4.2
BEFORE ARRIVING AT TERMINAL											
Usefulness of BC Ferries website	4.3	4.3	4.3	4.3	4.3	4.3	4.3	4.2	4.3	4.3	4.2
Ease of using on-line reservations	4.2	4.2	4.2	4.2	4.1	4.2	4.1	3.9	4.1	4.1	4.1
Usefulness of BC Ferries phone service	3.6	3.6	3.6	3.6	3.4	3.4	3.8	3.8	3.4	3.9	3.8
Ease of using automated phone service	3.3	3.3	3.4	3.3	3.3	3.3	3.4	3.4	3.1	3.4	3.6
Highway signage	4.0	4.1	4.2	3.9	4.0	3.8	3.9	4.1	3.7	4.0	3.9
TERMINAL EXPERIENCE											
Terminal overall	3.9	4.0	4.1	3.8	4.0	3.8	3.9	3.9	3.8	3.9	3.9
Outside appearance of the terminal	3.9	3.9	4.0	3.9	4.0	3.7	3.8	3.9	3.6	3.9	4.0
Ticket Purchase											
Efficiency of the transaction	4.4	4.4	4.4	4.3	4.4	4.2	4.4	4.4	4.3	4.3	4.5
Staff courtesy	4.3	4.4	4.4	4.3	4.4	4.2	4.4	4.4	4.4	4.4	4.5
Clarity of staff directions	4.3	4.3	4.3	4.2	4.4	4.2	4.3	4.3	4.3	4.3	4.4
Food & Beverage Services at the Terminal											
Food beverages offered	3.3	3.5	3.6	3.3	3.2	3.0	3.1	3.3	-	3.1	-
Value for money	3.0	3.1	3.2	2.8	3.0	2.8	3.0	2.9	-	3.0	-
Gift Shop/News Stand at the Terminal											
Variety/selection of merchandise	3.6	3.7	3.8	3.6	3.5	3.3	3.2	3.4	-	3.2	-
Value for money	3.3	3.3	3.4	3.3	3.2	3.2	3.1	3.1	-	3.2	-
Outdoor Market Area at the Terminal											
Variety/selection of merchandise	3.3	3.4	3.5	3.4	3.3	2.9	3.4	3.4	-	3.5	-
Value for money	3.2	3.3	3.4	3.2	3.1	3.0	3.2	3.1	-	3.3	-
Other Terminal Services											
Clarity of Public address system	3.4	3.5	3.5	3.5	3.4	3.3	3.3	3.2	3.1	3.5	-
Announcements when you need to be informed	3.7	3.7	3.8	3.7	3.7	3.6	3.5	3.5	3.4	3.5	3.9
Overall look & décor inside terminal	3.7	3.9	4.0	3.6	3.9	3.4	3.6	3.8	-	3.5	-
Availability of washrooms	3.9	4.0	4.0	3.9	3.9	3.7	3.8	4.0	3.7	3.7	4.1
Cleanliness of washrooms	3.7	3.8	3.8	3.7	3.8	3.6	3.8	3.9	3.4	3.9	3.9
Procedures for loading	4.0	4.0	4.1	3.9	4.0	3.8	3.9	3.9	4.0	3.8	4.1
Professionalism of terminal staff	4.1	4.1	4.1	4.0	4.1	3.9	4.2	4.1	4.2	4.2	4.3

continued

Average Satisfaction Ratings by Route –All Waves 2005 (cont'd)											
(see page 30 for Route Number Codes)											
	Total	Larger Routes				Route	Smaller Routes				
		Total	1	2	30	3	Total	4	19	5/9	23
Foot Passenger Services at the Terminal											
Usefulness of TV info screens	3.6	3.7	3.8	3.2	3.8	3.2	3.5	3.5	-	-	-
Availability of parking spaces	3.5	3.7	3.8	3.4	3.8	3.7	2.9	3.3	2.2	3.6	-
Parking value for money	2.6	2.4	2.3	2.4	2.5	3.2	2.4	2.8	2.9	2.0	-
Ease of using passenger drop-off/ pick-up area	3.7	3.6	3.6	3.6	3.8	3.8	3.6	3.6	3.1	3.8	4.1
Availability of seating in pre-boarding lounge at terminal	3.7	3.7	3.8	3.5	3.9	3.6	3.7	4.0	3.3	3.8	4.0
Comfort of seating in pre-boarding lounge at terminal	3.5	3.7	3.8	3.5	3.7	3.4	3.2	3.8	2.6	3.2	3.7
Cleanliness of pre-boarding lounge	3.8	4.0	4.0	3.8	4.1	3.6	3.6	4.0	3.3	3.5	3.9
ONBOARD EXPERIENCE											
Onboard overall	4.0	4.1	4.2	4.0	3.9	4.0	3.9	3.8	3.9	3.9	4.2
Gift Shop/ News Stand											
Variety/ selection of merchandise	3.9	3.9	3.9	3.9	3.7	3.9	3.6	-	-	3.6	-
Staff courtesy	4.1	4.1	4.1	4.0	4.0	4.0	4.1	-	-	4.1	-
Ease of moving around inside shop	3.4	3.4	3.6	3.3	3.0	3.3	3.5	-	-	3.5	-
Value for money	3.3	3.3	3.4	3.2	3.2	3.3	3.3	-	-	3.3	-
Food Services											
Length of time in line for food services	3.5	3.6	3.6	3.5	3.5	3.4	3.7	-	-	3.7	-
Food/ beverages offered	3.6	3.6	3.7	3.6	3.4	3.4	3.1	-	-	3.1	-
Staff courtesy	4.1	4.1	4.1	4.0	4.1	4.0	4.1	-	-	4.1	-
Availability of seating	4.0	4.0	4.0	3.9	4.0	4.1	4.0	-	-	4.0	-
Comfort of seating	3.6	3.8	3.8	3.7	3.6	3.8	3.5	-	-	3.5	-
Cleanliness of seating area	4.0	3.9	3.9	4.0	3.9	4.0	3.9	-	-	3.9	-
Value for money	3.2	3.3	3.4	3.1	3.1	3.2	3.2	-	-	3.2	-
Washrooms											
Availability of washrooms	4.0	4.0	4.0	4.0	3.9	3.9	3.9	3.9	3.7	3.9	4.2
Cleanliness of washrooms	3.7	3.8	3.8	3.7	3.7	3.6	3.7	3.7	3.2	3.8	4.0
Lounge Seating											
Comfort of indoor lounge seating	3.8	3.9	4.1	3.8	3.6	3.9	3.4	3.0	2.8	4.0	3.9
Cleanliness of indoor lounge seating area	4.0	4.0	4.1	4.0	4.0	4.0	3.8	3.8	3.3	3.9	4.2

continued

Average Satisfaction Ratings by Route –All Waves 2005 (cont'd) (see page 30 for Route Number Codes)											
	Total	Larger Routes			Route 3	Smaller Routes					
		Total	1	2		30	Total	4	19	5/9	23
Other Onboard Facilities/ Services											
Play area for children	3.6	3.7	3.8	3.5	3.6	3.4	3.3	-	-	3.3	-
Video arcade	3.4	3.5	3.5	3.6	3.4	3.4	2.9	-	-	2.9	-
Work stations	3.7	3.7	3.8	3.9	3.4	3.6	3.5	-	-	3.5	-
Outside decks	3.9	4.0	4.1	3.8	3.8	3.8	3.8	3.7	3.5	3.9	4.1
Outside appearance of the vessel overall	3.8	3.9	4.0	3.8	3.6	3.7	3.7	3.8	3.5	3.8	3.9
Availability of tourist and travel information	4.0	4.1	4.1	4.1	4.0	4.0	3.8	3.8	3.2	4.0	4.0
Ease of access, overall, for people with disabilities	3.5	3.8	3.9	3.6	3.6	3.4	3.2	3.5	2.9	3.4	3.1
Ease of finding facilities/ services	3.9	3.9	3.9	3.9	3.8	3.8	3.8	3.7	3.5	3.9	3.9
Clarity of public address system	3.6	3.7	3.6	3.7	3.7	3.7	3.5	3.5	3.1	3.6	3.5
Announcements when you need to be informed	3.8	3.9	3.9	3.8	3.9	3.8	3.7	3.6	3.4	3.8	3.8
Atmosphere/ environment	3.8	3.9	4.0	3.9	3.7	3.8	3.7	3.5	3.4	3.8	3.9
Procedures for unloading	4.0	4.0	4.1	3.9	3.9	3.8	3.9	3.9	3.9	3.8	4.1
Professionalism with onboard staff	4.1	4.1	4.2	4.1	4.0	4.0	4.1	4.1	4.1	4.2	4.2
Experience with the Sailing Schedule											
Earliest ferry earliest enough	3.9	3.9	3.8	3.8	4.0	4.0	3.9	3.9	4.1	3.8	3.9
Latest ferry late enough	3.2	3.3	3.4	3.0	3.6	2.8	3.4	2.9	3.3	3.6	3.6
Ferry sailing frequent enough	3.3	3.5	3.7	3.1	3.2	2.9	3.3	3.4	3.6	2.8	3.6
Ability to get onto desired ferry	3.7	3.7	3.9	3.4	3.7	3.5	3.6	3.8	3.2	3.8	3.4
Ability to connect with other sailings	3.4	3.3	3.3	2.9	3.8	3.5	3.4	3.5	2.6	3.5	3.9
Ferry departing on time	3.8	4.0	4.1	3.7	3.9	3.4	3.6	3.9	3.5	3.3	4.1
Safety											
Safety of ferry operations	4.1	4.1	4.2	4.0	4.0	4.0	4.1	4.2	4.0	4.1	4.2
Safety of loading/unloading	4.1	4.1	4.2	4.1	4.1	4.0	4.1	4.2	4.1	4.1	4.2
OVERALL VALUE											
Value for money of fares	3.2	3.2	3.3	3.0	3.0	3.2	3.3	3.3	3.3	3.4	3.2

TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal - Total 2005							
	Total	Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point
OVERALL EXPERIENCE							
Overall	4.1	4.2	4.3	4.0	3.9	4.0	4.0
TERMINAL EXPERIENCE							
Terminal overall	3.9	4.1	4.1	3.8	3.8	3.8	4.0
Outside appearance of the terminal	3.9	3.9	4.0	3.8	3.9	3.7	4.0
Ticket Purchase							
Efficiency of the transaction	4.4	4.4	4.4	4.3	4.3	4.2	4.4
Staff courtesy	4.3	4.4	4.4	4.3	4.3	4.2	4.5
Clarity of staff directions	4.3	4.4	4.3	4.2	4.2	4.1	4.4
Food & Beverage Services at the Terminal							
Food beverages offered	3.3	3.5	3.6	3.2	3.2	3.0	3.1
Value for money	3.0	3.1	3.2	2.9	2.7	2.8	2.9
Gift Shop/News Stand at the Terminal							
Variety/selection of merchandise	3.6	3.7	3.8	3.5	3.6	3.3	3.3
Value for money	3.3	3.3	3.5	3.3	3.2	3.2	3.1
Outdoor Market Area at the Terminal							
Variety/selection of merchandise	3.3	3.5	3.5	3.0	3.4	2.9	3.1
Value for money	3.2	3.3	3.4	3.1	3.3	3.0	2.8
Other Terminal Services							
Clarity of Public address system	3.4	3.4	3.4	3.4	3.6	3.3	3.6
Announcements when you need to be informed	3.7	3.7	3.7	3.6	3.7	3.5	3.8
Overall look and décor inside terminal	3.7	3.9	4.0	3.6	3.7	3.3	3.9
Availability of washrooms	3.9	3.9	4.1	3.8	3.9	3.8	4.0
Cleanliness of washrooms	3.7	3.8	3.8	3.7	3.6	3.6	3.8
Procedures for loading	4.0	4.1	4.2	3.8	3.9	3.9	4.0
Professionalism of terminal staff	4.1	4.1	4.1	3.9	4.0	4.0	4.1
Foot Passenger Services at the Terminal							
Usefulness of TV info screens	3.6	3.9	3.8	3.2	3.2	3.2	3.6
Availability of parking spaces	3.5	3.6	4.0	3.5	3.3	3.8	4.1
Parking value for money	3.0	2.3	2.4	2.6	2.4	3.4	2.7
Ease of using passenger drop-off/pick-up area	3.7	3.7	3.6	3.8	3.5	3.7	3.9
Availability of seating in pre-boarding lounge at terminal	3.7	3.7	3.9	3.6	3.4	3.6	4.0
Comfort of seating in pre-boarding lounge at terminal	3.5	3.6	3.9	3.5	3.5	3.4	3.8
Cleanliness of pre-boarding lounge	3.8	4.0	4.1	3.7	3.8	3.6	4.2
Overall Value							
Value for money of fares	3.2	3.3	3.3	3.0	3.1	3.2	3.1

Research Methodology

Background

British Columbia Ferry Services Inc. (BC Ferries) commissioned tracking research to gauge customer satisfaction on specific BC Ferries routes to determine and monitor areas of service that passengers believe are performing well and areas that require improvement. This study is part of a regular program of ongoing research conducted by BC Ferries.

Project Overview

The 2005 Customer Satisfaction Tracking study follows the 2003 and 2004 study and is designed to track performance on satisfaction levels overall, as well as satisfaction levels with specific service attributes. The resulting satisfaction scores are published annually on the BC Ferries Web site.

Research Objectives

The specific objectives are as follows:

- Determine customer satisfaction levels with BC Ferries' service, overall,
- Determine satisfaction with specific attributes of the service, spanning the entire range of points of customer contact with BC Ferries,
- Track changes in satisfaction over time,
- Ensure that the tracking research is relevant and credible so as to pass internal and external scrutiny

Sample Selection

First, a random sample of passengers aged 18 or older 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 internal 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.

Completed questionnaires were mailed directly to the professional research firm, not to BC Ferries, in order to maintain respondent anonymity. As well, the practice is in accordance with existing federal and provincial rules related to privacy legislation.

This self-administered portion of the survey was designed to capture satisfaction and usage information from all potential points of contact. The survey related to the customer’s experience on their current/last trip on BC Ferries, when they received the questionnaire, rather than to their general experience onboard a ferry at some time in the past.

Sample Size

The total sample of placements was distributed across larger and smaller routes to ensure a minimum number of interviews per route for reliability. The final results were weighted to reflect actual passenger traffic volumes.

Routes surveyed and the number of screeners and completed returned surveys from each route during 2005 are as follows:

	Screeners	Returns
Larger Routes:	7,075	2,740
Route 1: Tsawwassen-Swartz Bay	1,988	761
Route 2: Horseshoe Bay-Departure bay	2,002	639
Route 3: Horseshoe Bay-Langdale	1,304	618
Route 30: Tsawwassen-Duke Point	1,781	722
Smaller Routes:	7,210	2,691
Route 4: Swartz Bay-Fulford Harbour, Salt Spring Island	1,530	499
Route 19: Departure Bay–Descanso Bay, Gabriola Island	1,348	417
Route 5/9: Southern Gulf Islands	3,545	1,572
Route 23: Campbell River-Quadra Island	787	203
TOTAL	14,285	5,431

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

- within the year by known BC Ferries traffic volume by season

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 – 2005 –				
	<u>Screeners</u>		<u>Returns</u>	
	<u>Actual</u> (14,285) %	<u>Weighted</u> (14,285) %	<u>Actual</u> (5,431) %	<u>Weighted</u> (5,431) %
Larger Routes	50	81	50	82
Weekend	15	27	15	27
30	3	3	3	3
3	3	5	3	6
2	5	7	4	6
1	5	13	5	13
Weekday	34	54	35	55
30	9	5	10	6
3	7	11	8	13
2	9	14	8	12
1	9	24	9	24
Smaller Routes	50	19	50	18
Weekend	14	5	13	4
19	3	1	1	1
4	3	1	2	1
5/9	7	2	8	2
23	2	1	1	1
Weekday	36	14	37	13
19	7	4	6	4
4	8	3	7	3
5/9	18	4	21	5
23	4	3	3	2

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 2005 were completed during shoulder season in June, peak season in August and off-peak season in November, same as in 2003 and 2004. Results were combined for an annual total and were weighted according to actual traffic volumes.

Data Analysis

The data entry system used for this study includes an internal edit program. This immediate verification during the data entry process reduces entry error. After entry of the data, a further more detailed computer edit is performed. 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 final data tabulation.

Response Rate

The following outlines the response rates achieved in 2004 tracking program.

Response Rates	
Larger Routes	Total 2005
Route 1	38%
Route 2	32%
Route 3	47%
Route 30	41%
Smaller Routes	
Route 4	33%
Route 19	31%
Route 5/9	44%
Route 23	26%
Overall response	38%

Margin of Error

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

Tolerance Limits – 2005		
	Actual Sample Size	Approximate Tolerance Limits % Points
Total Screeners	14,285	+/- 0.8%
Total Returns	5,431	+/- 1.3%
Total Larger Route Returns	2,740	+/- 1.9%
Total Smaller Route Returns	2,691	+/- 1.9%

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 rigors have consistently produced an accuracy level well within the tolerance limits described here.