

Customer Satisfaction Tracking Annual Report 2009

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 2009. 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 2009, a total of 12,700 screeners were completed and 5,076 questionnaires returned. A more detailed explanation of the research design is included in the *Research Methodology* section, in the Appendix of this report.

Findings

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

Satisfaction with BC Ferries Overall

- A total of 91% of passengers in 2009 reported to be satisfied overall with their experience travelling on BC Ferries, an increase from 86% in 2008. An overall score of 4.3 has been achieved (on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'), the highest average score recorded since the inception of the Customer Satisfaction Tracking research in 2002.
- Ratings have improved among virtually all passenger segments (e.g. frequent travellers, business travellers, etc.) and on virtually all routes, except Route 4 which experienced delays in sailings during the June measure, impacting overall satisfaction levels.

Satisfaction before Arriving at Terminal

- Ratings of the BC Ferries web site have been stable while satisfaction with the phone service and specifically the reservation's system, as well as highway signage has improved slightly.

Satisfaction at the Terminal

- Overall satisfaction with the experience at the terminal before boarding has also strengthened with 86% satisfied in contrast to 81% a year ago, resulting in an increase in the average score from 4.0 to 4.1.
- The most notable improvement was at Horseshoe Bay but minor increases in ratings also were recorded at Tsawwassen and Departure Bay.
- Ratings have been stable with respect to the food and retail services at the terminal but have improved for the *overall look and décor inside terminal and outside appearance*. Ratings also have reached their highest point for *professionalism of terminal staff, availability of washrooms, and for cleanliness of washrooms*.
- In addition, scores have improved among foot passengers for *cleanliness of pre-boarding lounges, ease of using passenger drop-off and pick-up areas* and for *usefulness of TV information screens*.

Satisfaction Onboard

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

- A total of 90% of passengers in 2009 were satisfied with their overall experience onboard, for an overall rating of 4.2 on the 5-point scale, which is the highest score achieved to-date. Most routes with the exception of Route 4 have slightly improved scores.
- Satisfaction levels have been trending upwards with respect to all aspects of the gift shop/news stand and food services, with the exception of value for money (stable in food services but slight decline in the gift shop/news stand).
- Furthermore, scores have improved for cleanliness of washrooms, for both *cleanliness and comfort of lounge seating*, and for a number of other onboard facilities and services, most notably *ease of access for those with disabilities*.

Satisfaction with Sailing Schedules

- Ratings have strengthened on many aspects of the sailing schedules—*ability to get on desired sailing, sailing frequency*, and in particular *departing on time*.

Satisfaction with Safety

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

Satisfaction with Overall Value

- Ratings had declined for *value for money of fares* in 2007 and 2008; however, in the past year ratings have rebounded to a level witnessed in earlier years. The decrease in fuel surcharges and introduction of the CoastSaver program, combined with improvement to services have likely contributed to this upturn.

Key Conclusions

Satisfaction levels overall, and on a number of specific attributes and services at the terminal and onboard have improved over the past year or have continued to trend upwards. The key areas of success have been in the following areas:

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

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

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

The key drivers of satisfaction continue to be related to on-time departures, ability to get on the desired sailing, sailing frequency, and perceived value for money of fares and food. With improvements in customer satisfaction in a number of these particular areas, as well as improvements in many other areas, the overall satisfaction score has strengthened to its highest level.

Detailed Findings

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

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

Ferry Routes Included in Customer Satisfaction Survey - 2009	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay-Descanso Bay, Gabriola Island
Route 21	Denman-Buckley Bay
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

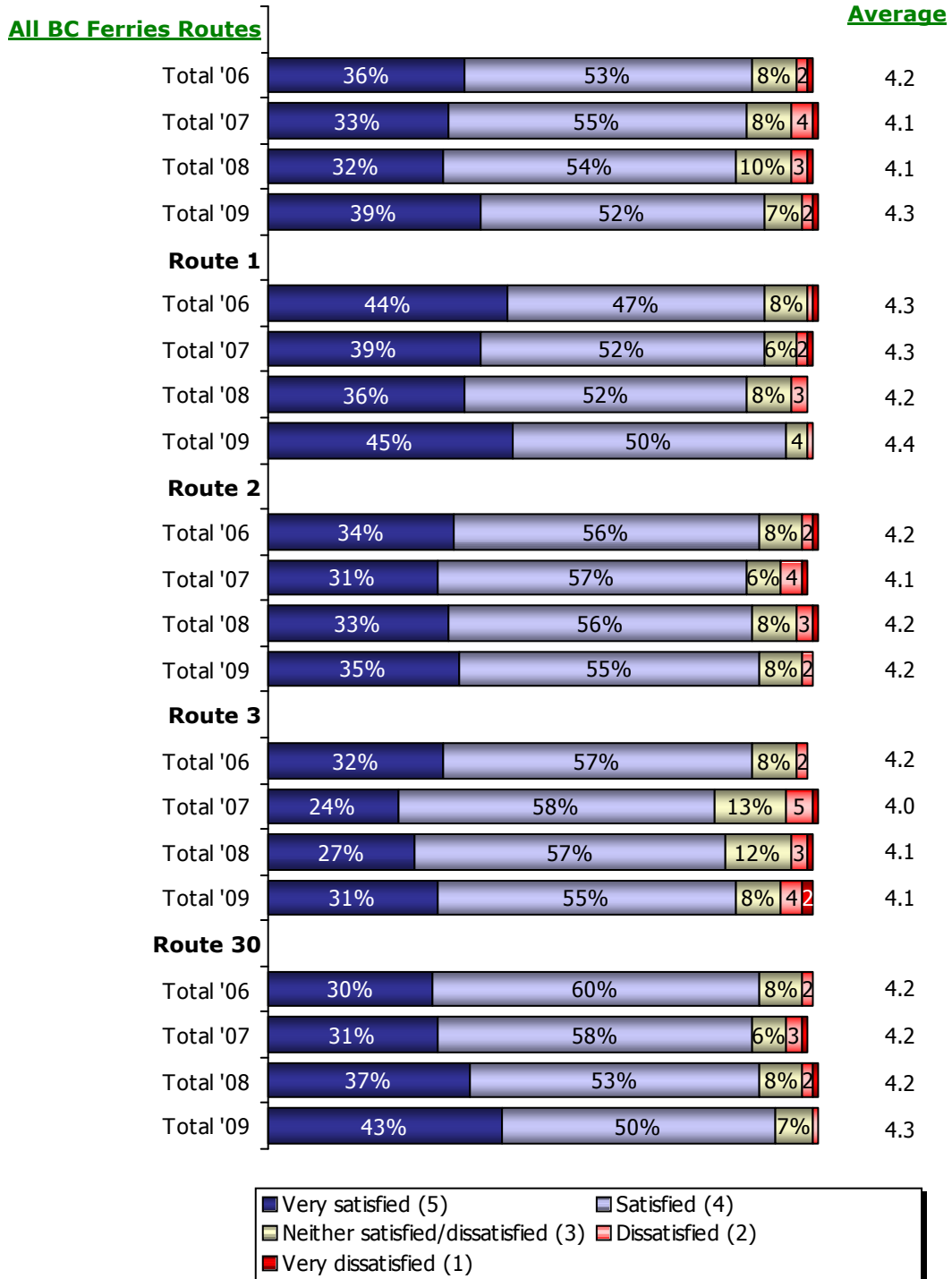
Overall Satisfaction with BC Ferries

A total of 91% of passengers in 2009 reported to be satisfied overall with their experience travelling on BC Ferries, an increase from 86% in 2008. An overall score of 4.3 has been achieved (on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'), the highest average score recorded since the inception of the Customer Satisfaction Tracking research in 2002.

Ratings have improved on virtually all routes except Route 4 which experienced delays in sailings during the June measure impacting overall satisfaction levels.

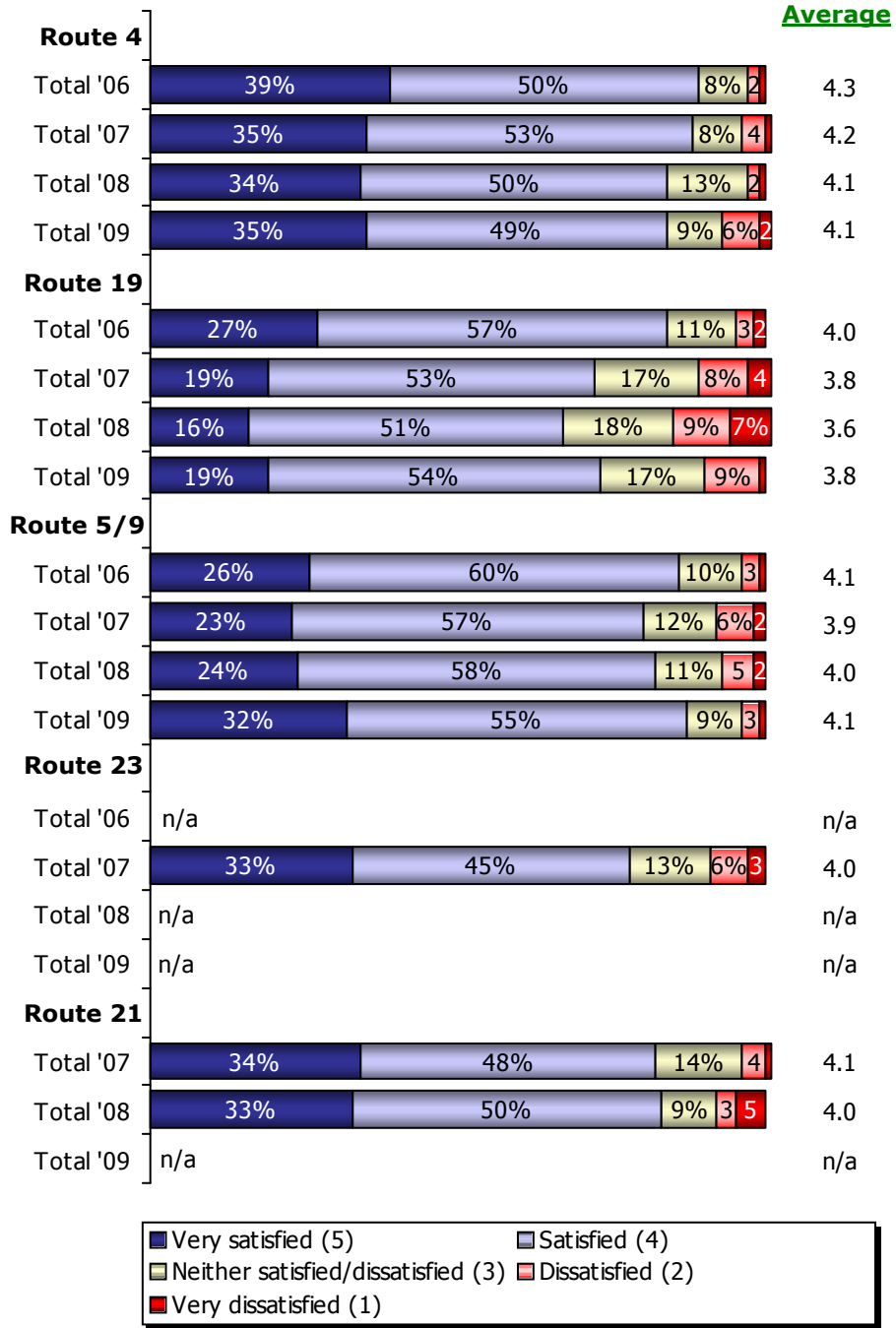
[NOTE: Refer to page 5 for route number codes]

Overall Satisfaction Level with Recent Experience Travelling with BC Ferries



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

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

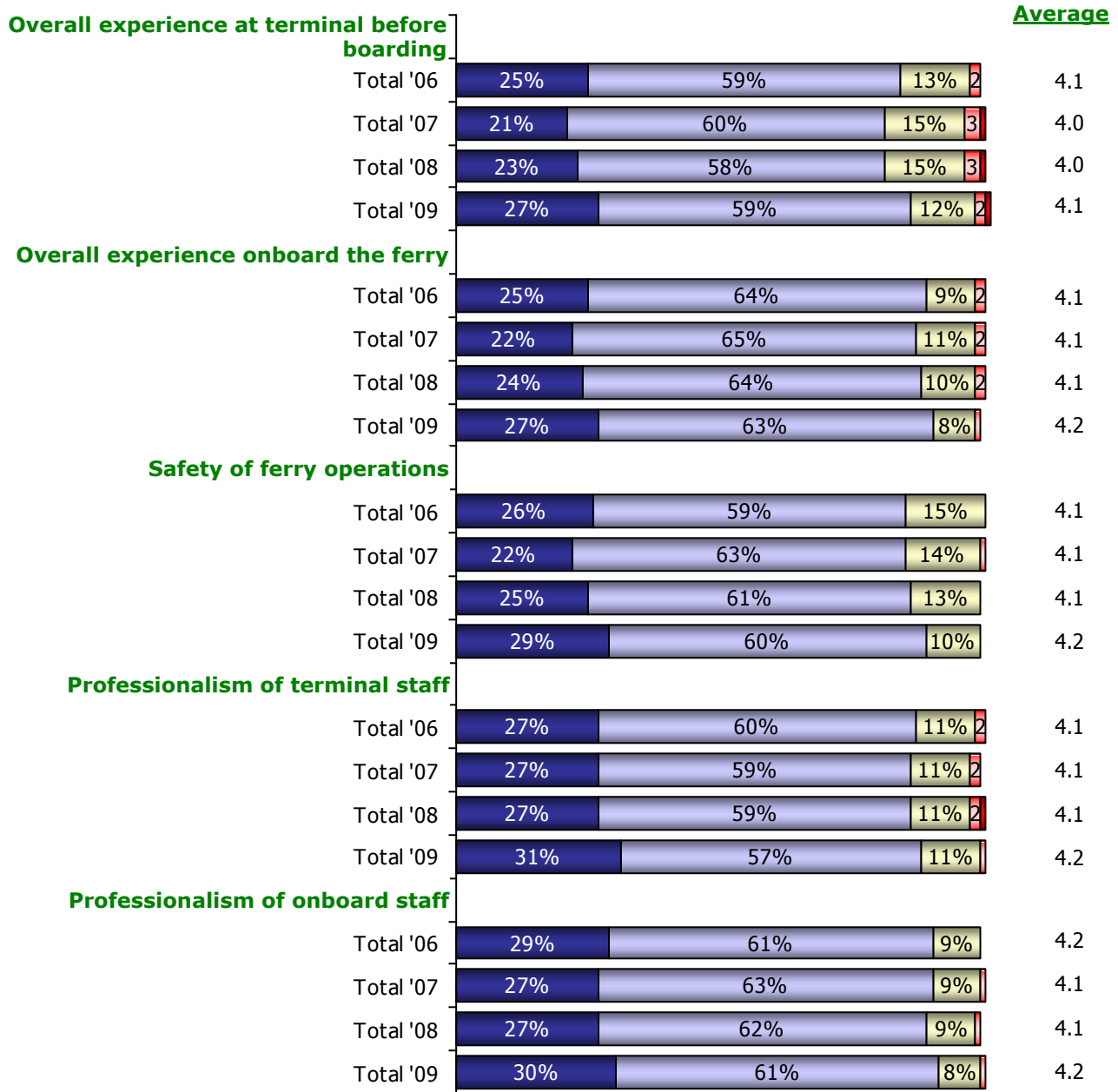


Q.1) How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?

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

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

Summary of Main Satisfaction Scores



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



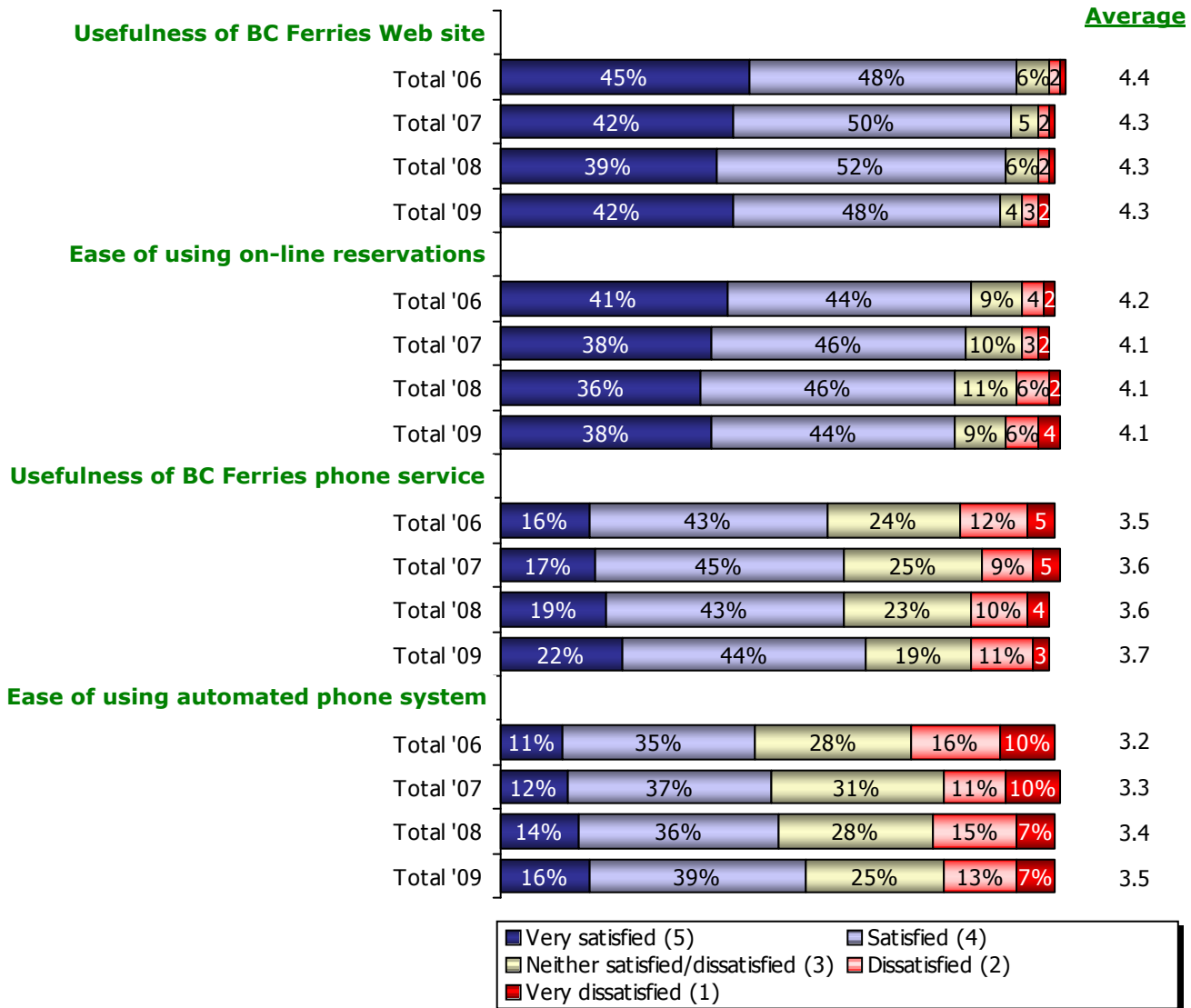
Before Arriving at Terminal

Web site and Phone Contact

Ratings are stable with respect to the *usefulness of BC Ferries web site* and to the *ease of making on-line reservations*.

Passengers are slightly more complimentary than in the past of the *usefulness of BC Ferries phone service*, and specifically with the *ease of using the automated system*. Since 2008, ratings have increased for the phone service from 3.6 to 3.7, and for the automated system from 3.4 to 3.5.

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



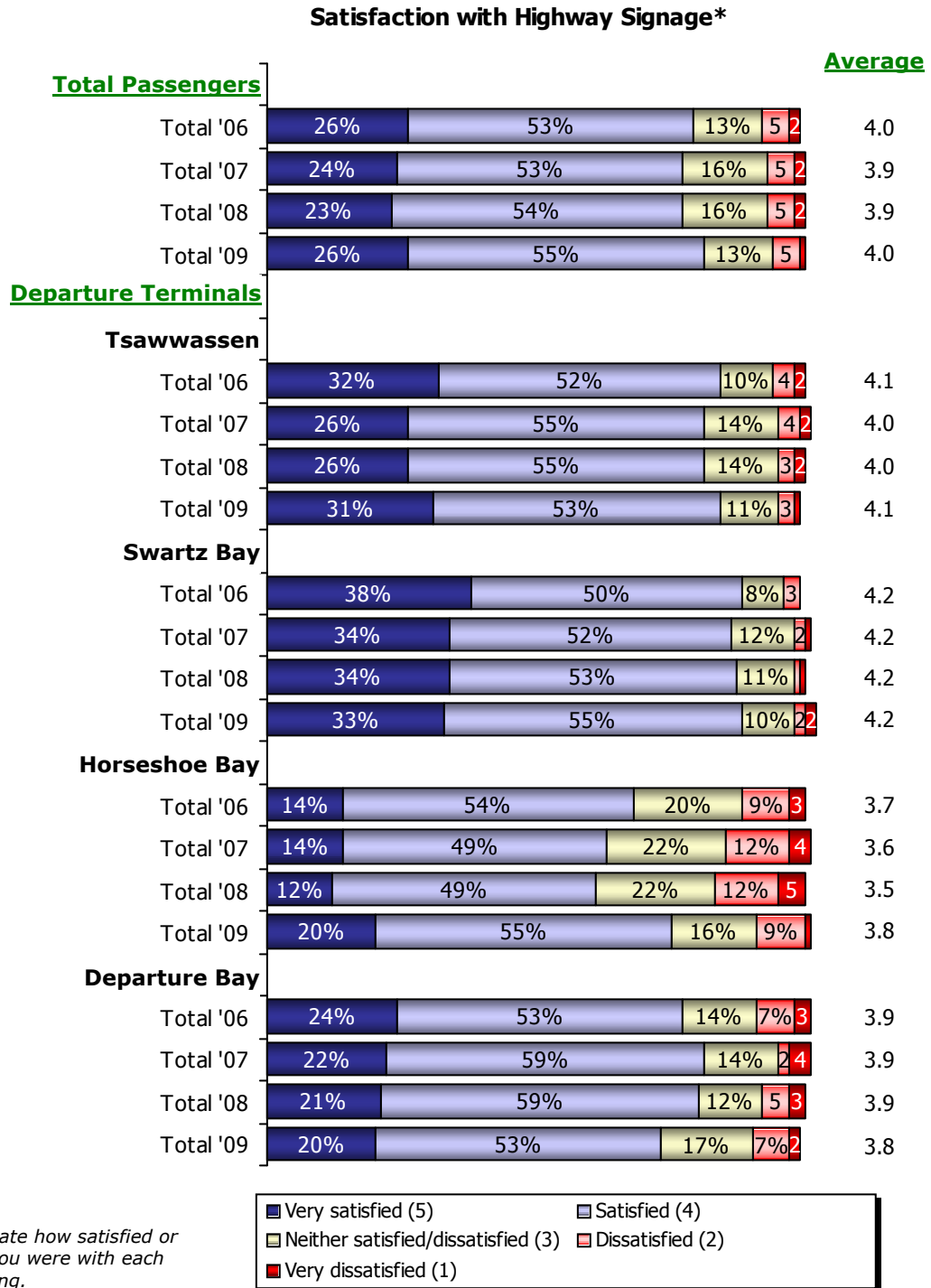
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* 68% usage Web site, 36% for on-line reservations

** 26% usage phone service, 21% for automated system

Highway Signage

Satisfaction levels with highway signage also have improved slightly since 2008, most notably at Horseshoe Bay.



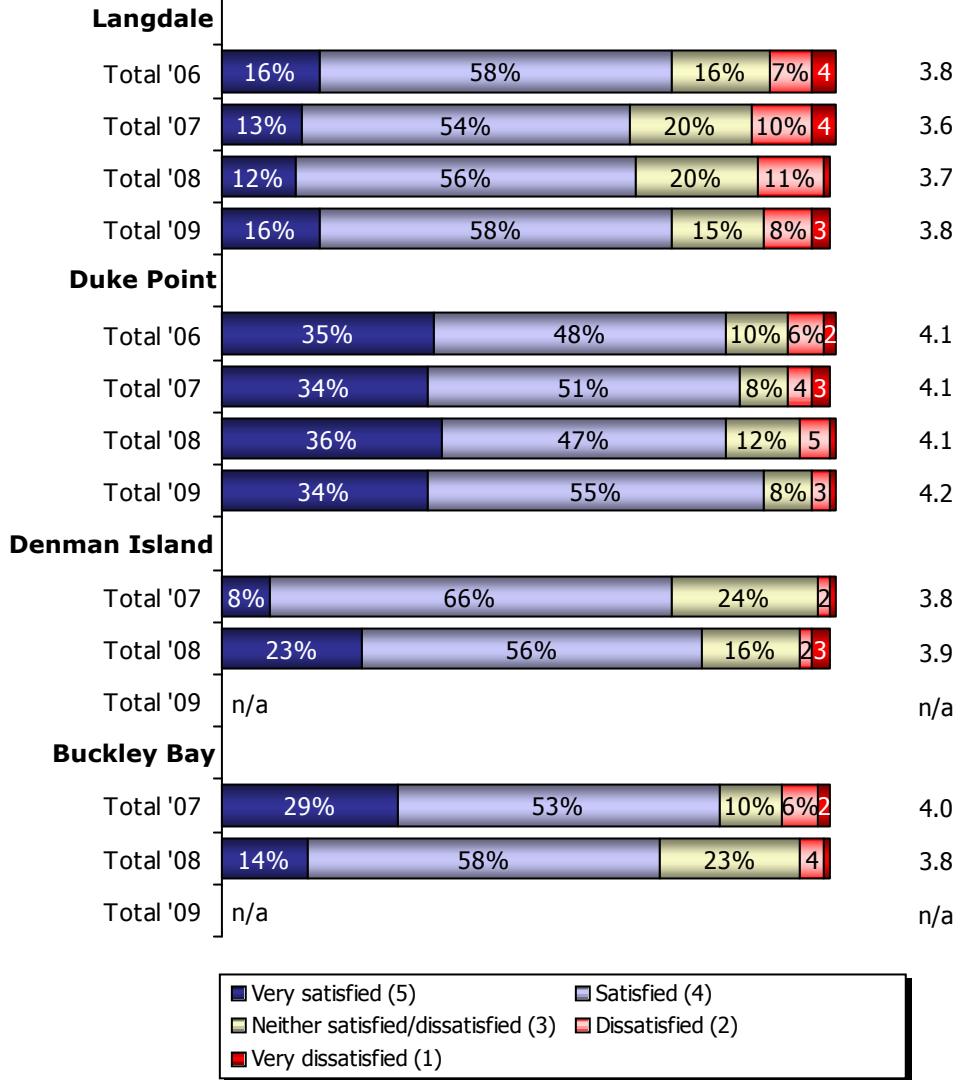
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* Usage: 79%

**Satisfaction with Highway Signage*
(cont'd)**

Departure Terminals

Average



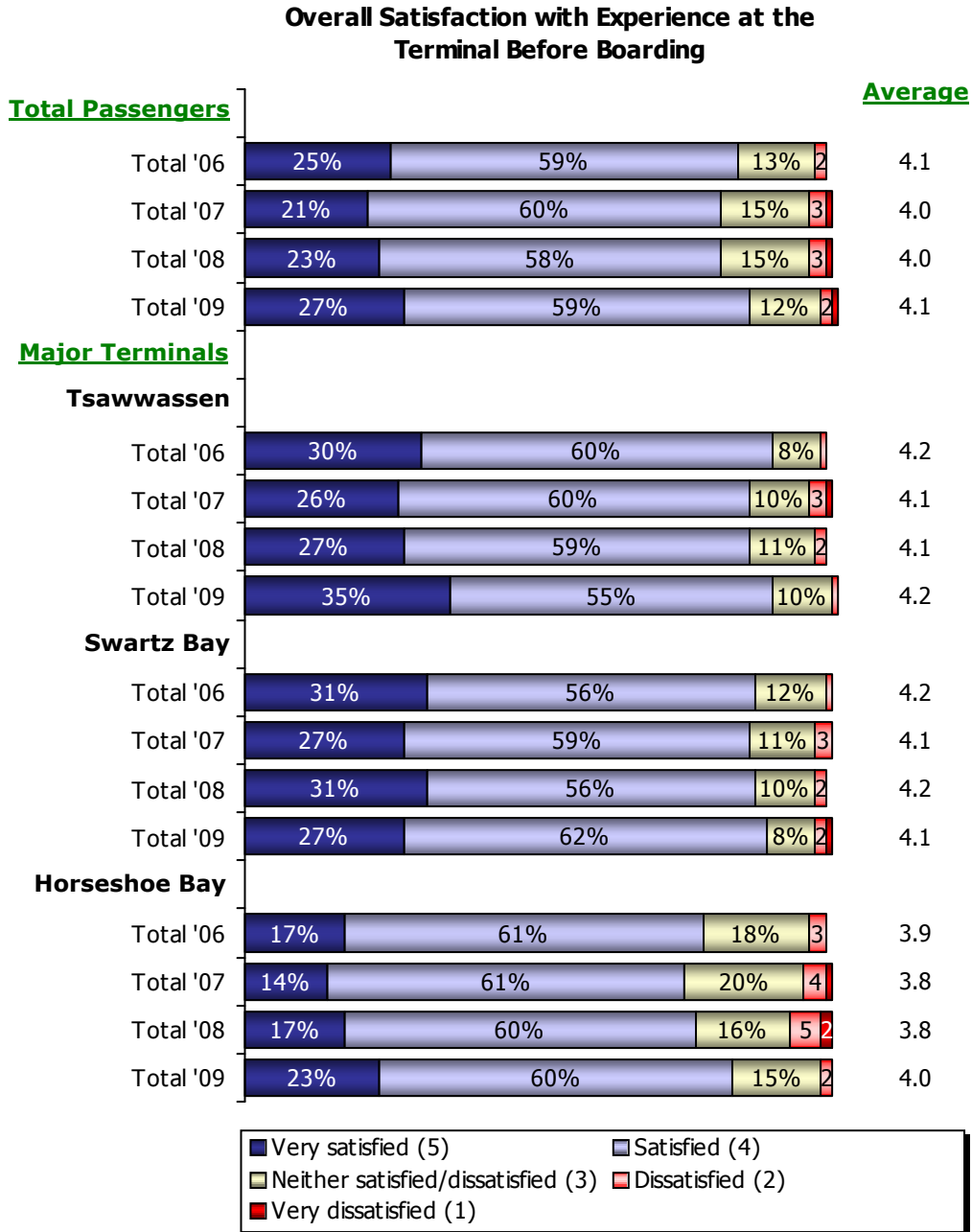
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* Usage:79%

At the Terminal

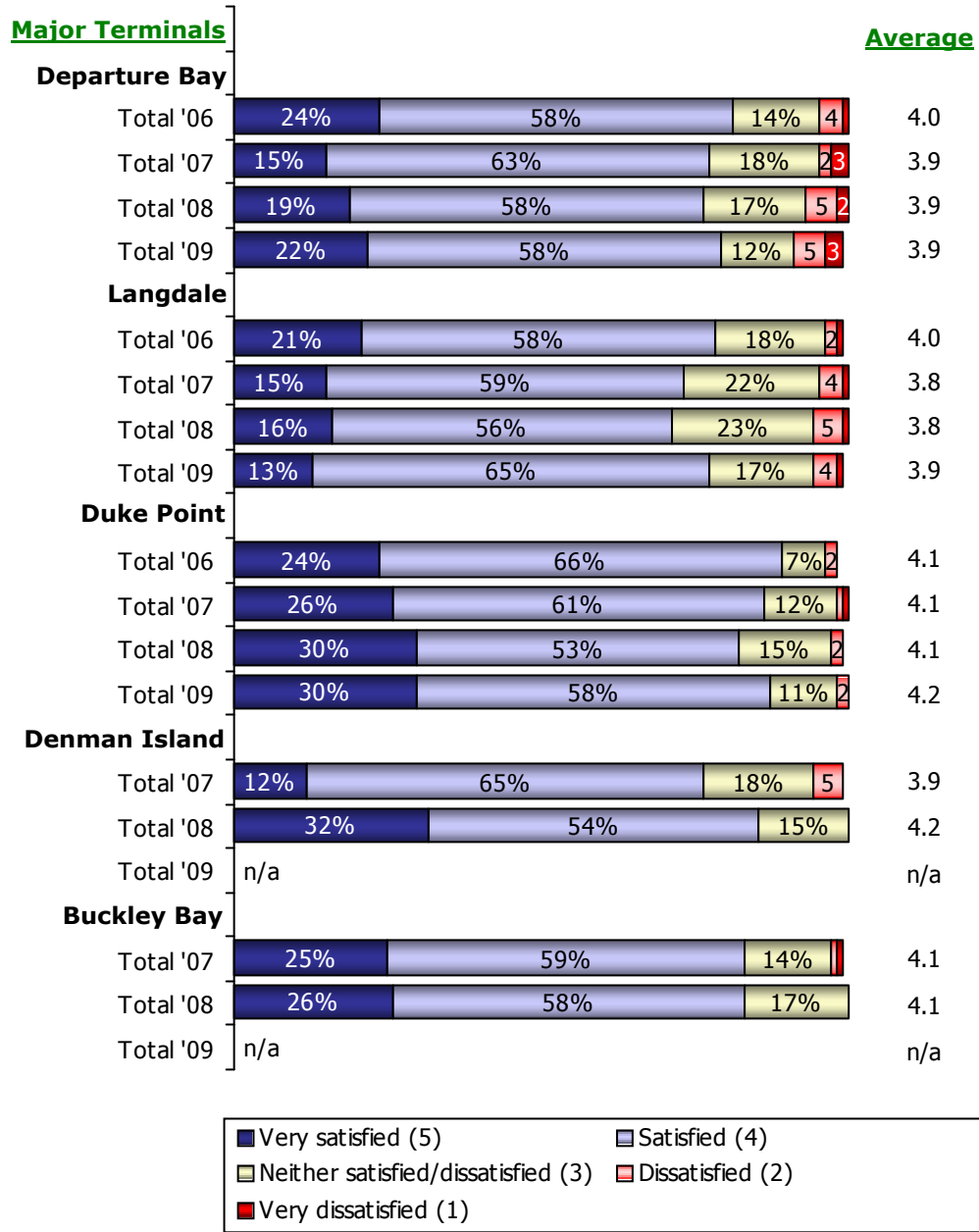
Overall Experience at the Terminal

Overall satisfaction with the experience at the terminal before boarding has also strengthened with 86% satisfied in contrast to 81% a year ago, resulting in an increase in the average score from 4.0 to 4.1. The most notable improvement was at Horseshoe Bay but minor increases in ratings also were recorded at Tsawwassen and Departure Bay.



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

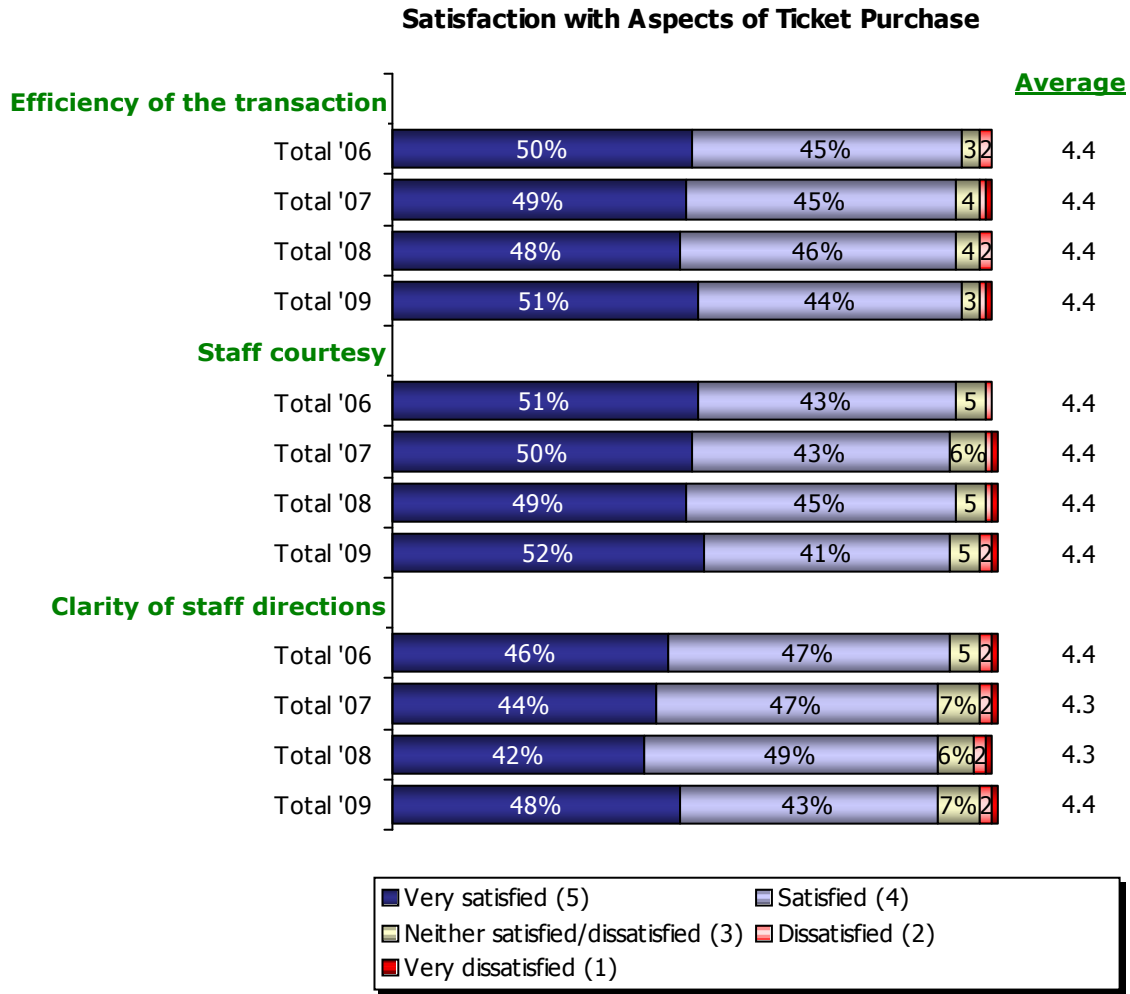
Overall Satisfaction with Experience at the Terminal Before Boarding (cont'd)



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

Ticket Purchase

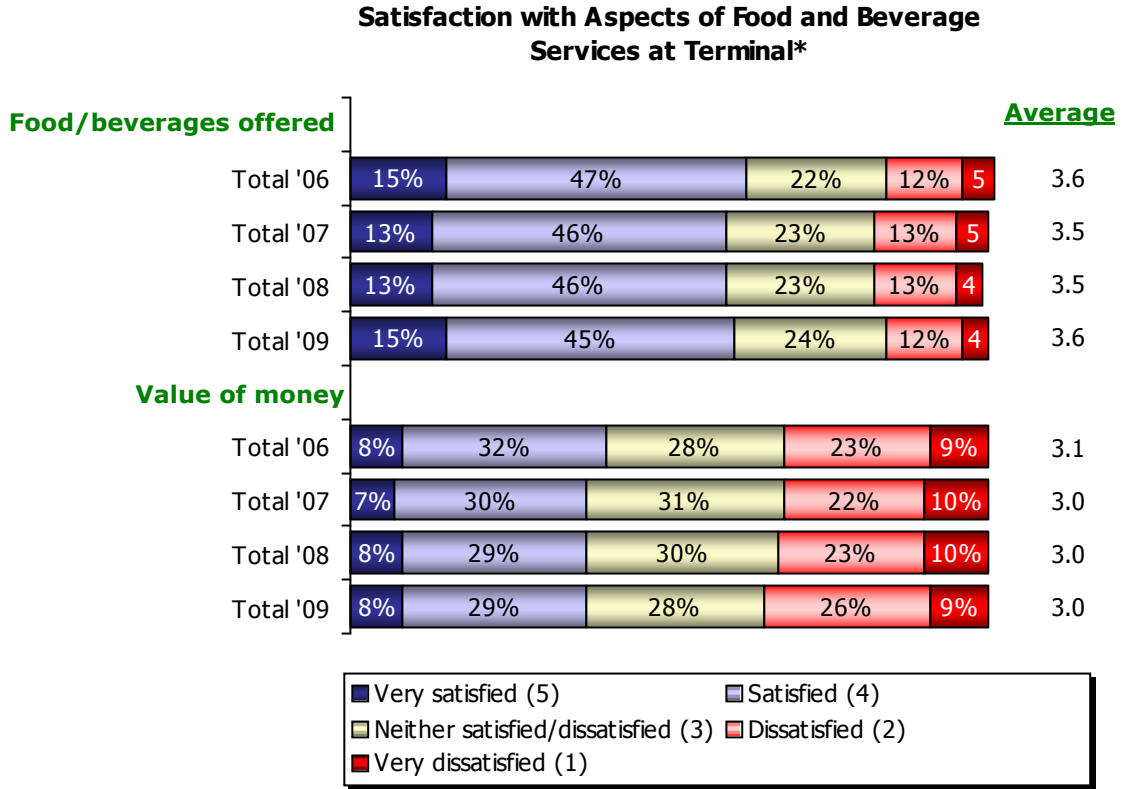
Satisfaction levels continue to be high with all aspects of the ticket purchase process with average ratings more or less similar to a year ago.



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

Food/Beverage Services at Terminal

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



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

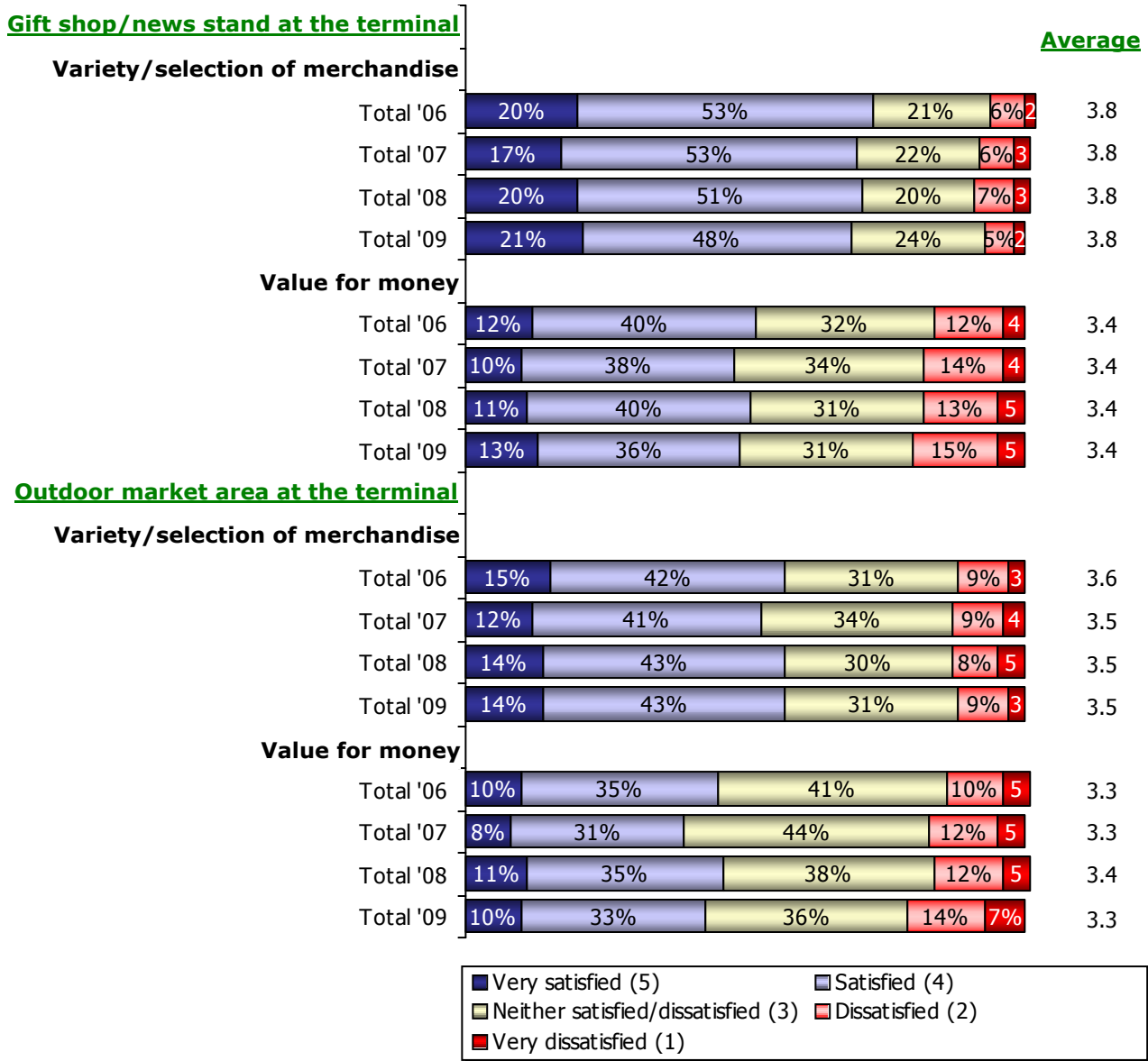
*** 46% usage overall; excluding routes 19, 21 and 23.**

Retail Services at Terminal

Similarly, satisfaction ratings are not statistically different from 2008 with respect to the gift shop/news stand services at the terminals, in terms of both *variety/selection* and *value for money*.

Satisfaction levels are also relatively stable with respect to the outdoor market areas.

Satisfaction with Aspects of Retail Services at Terminal*



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

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

Foot Passenger Services

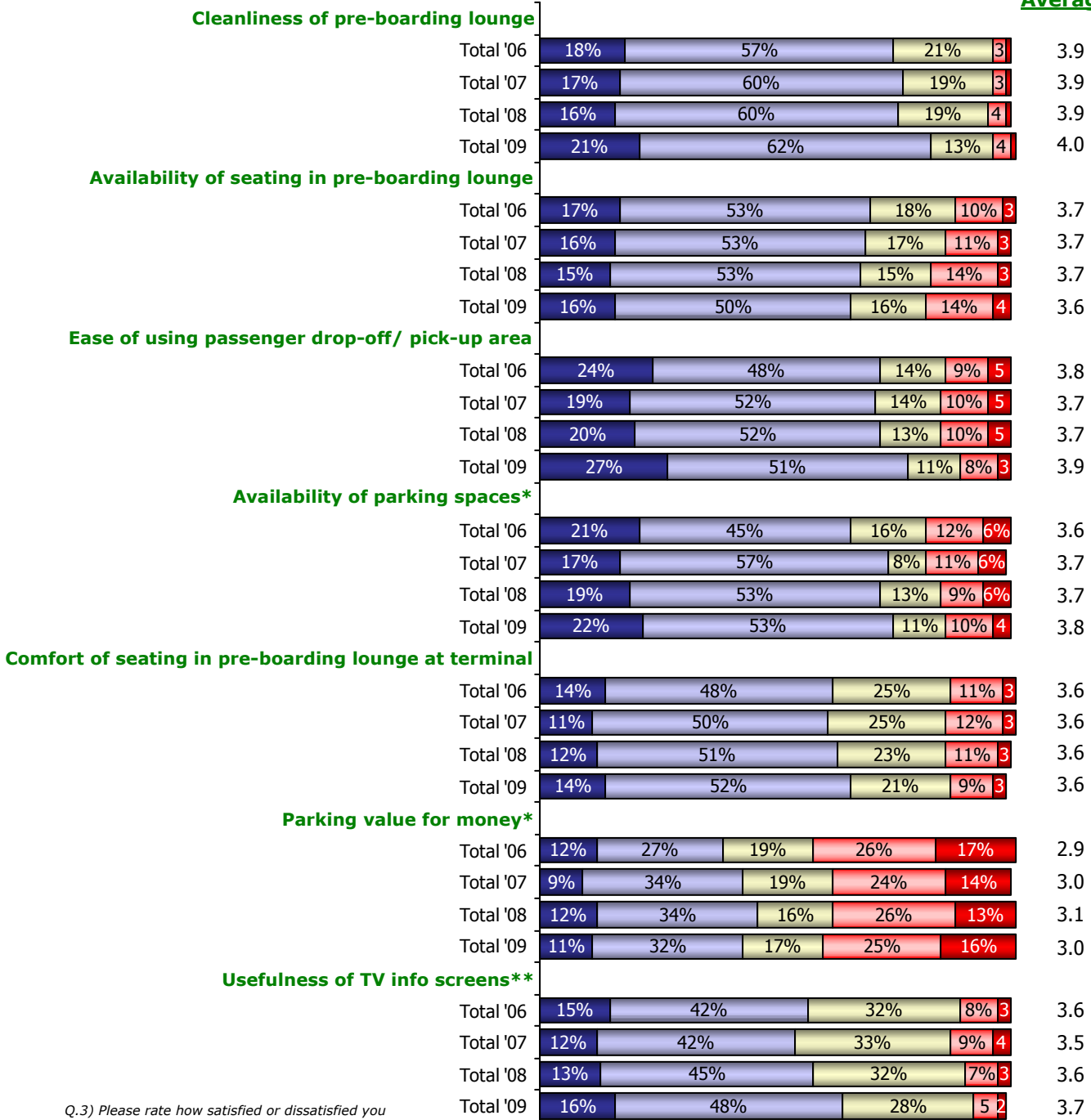
Foot passengers are reporting higher levels of satisfaction with the *cleanliness of pre-boarding lounges*, with *ease of using the passenger drop-off and pick-up areas* and with the *usefulness of TV information screens*, with ratings increasing at most major terminals.

In addition, passengers at Departure Bay are providing higher ratings for *availability of parking spaces*.

Satisfaction levels, however, have softened with respect to *parking value for money*.

Satisfaction with Foot Passenger Services

Average



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

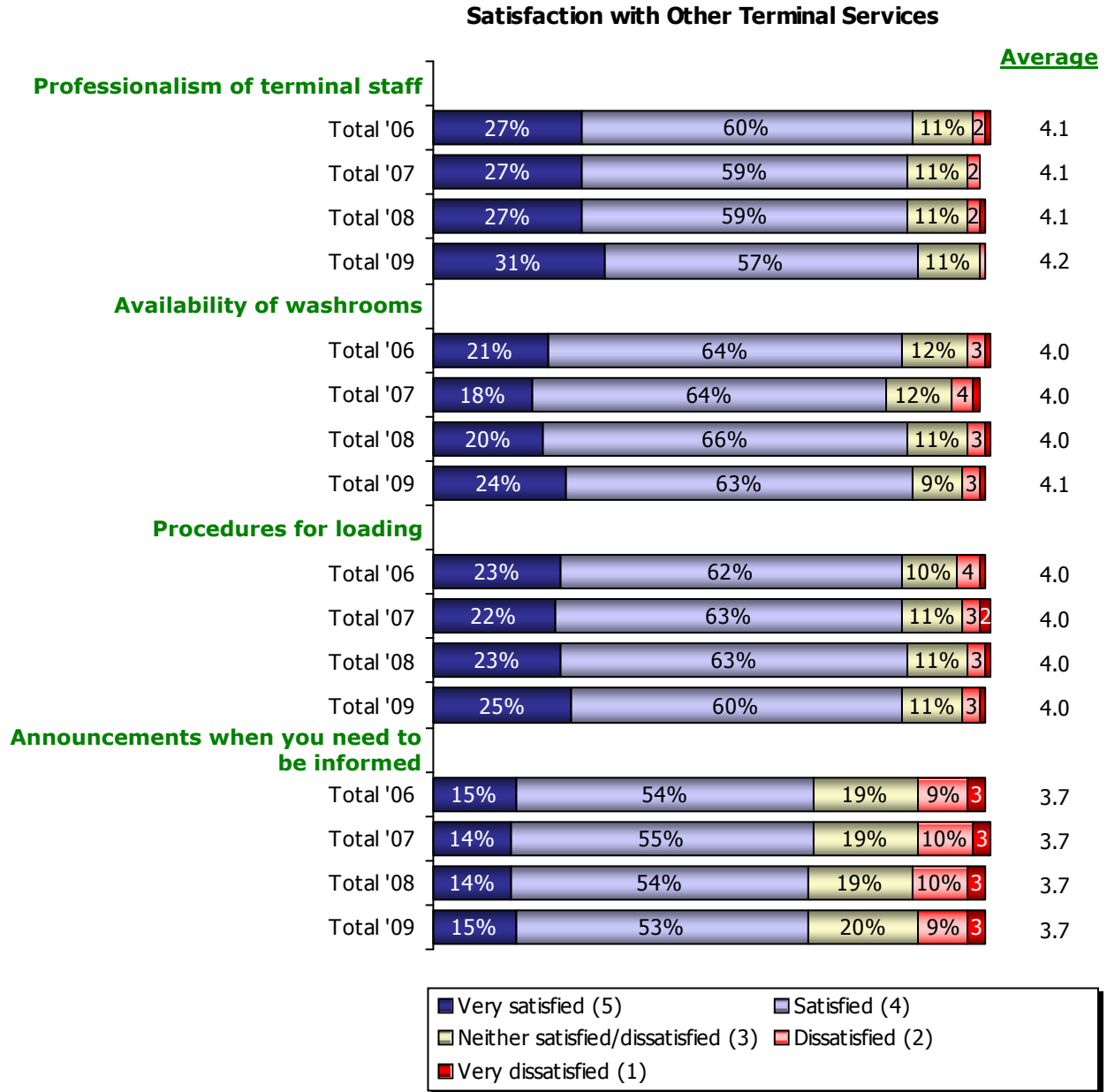
39% are foot passengers (including bus).
 * Excludes Route 23.
 ** Excludes Routes 19, 21, 23, & 5/9



Other Terminal Services

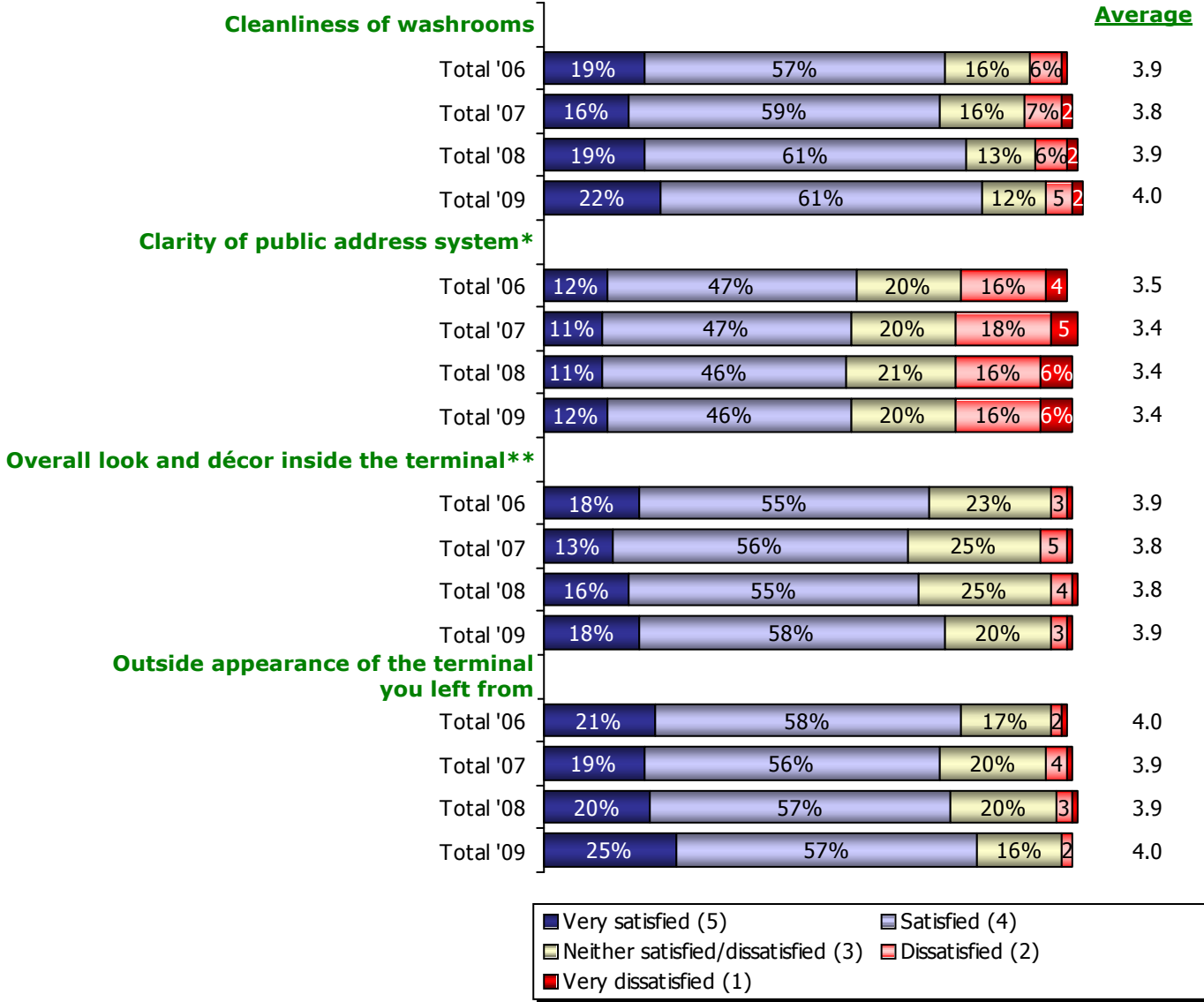
Passengers are more complimentary of the *overall look and décor of the inside terminal and outside appearance* than a year ago (ratings up 5 percentage points over the year) with ratings again improving at almost all major terminals.

Ratings have also reached their highest point for *professionalism of terminal staff, availability of washrooms, and for cleanliness of washrooms.*



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

Satisfaction with Other Terminal Services (cont'd)



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

* Excludes Route 21 & 23.

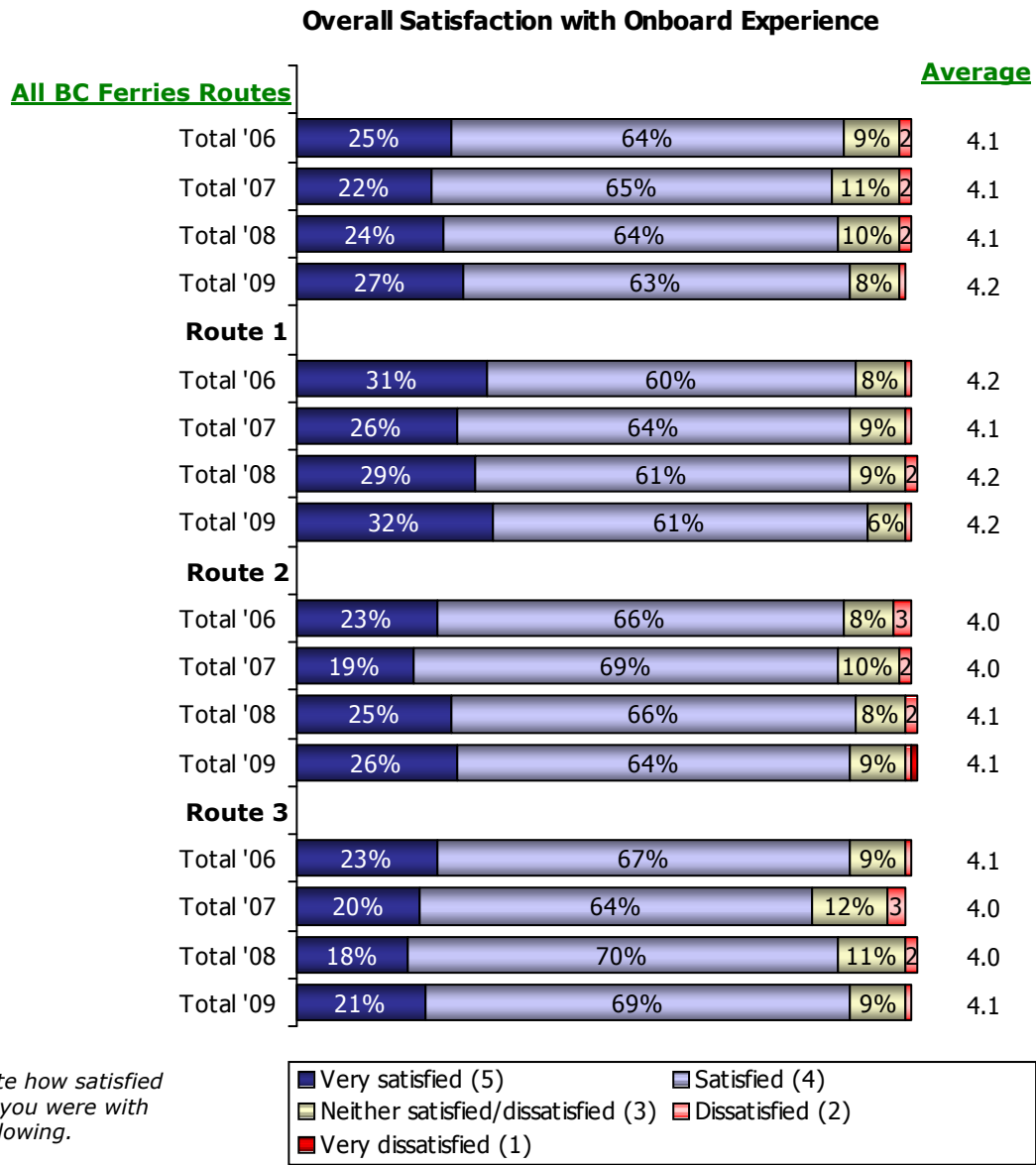
** Excludes Route 19, 21 & 23.

Onboard Experience

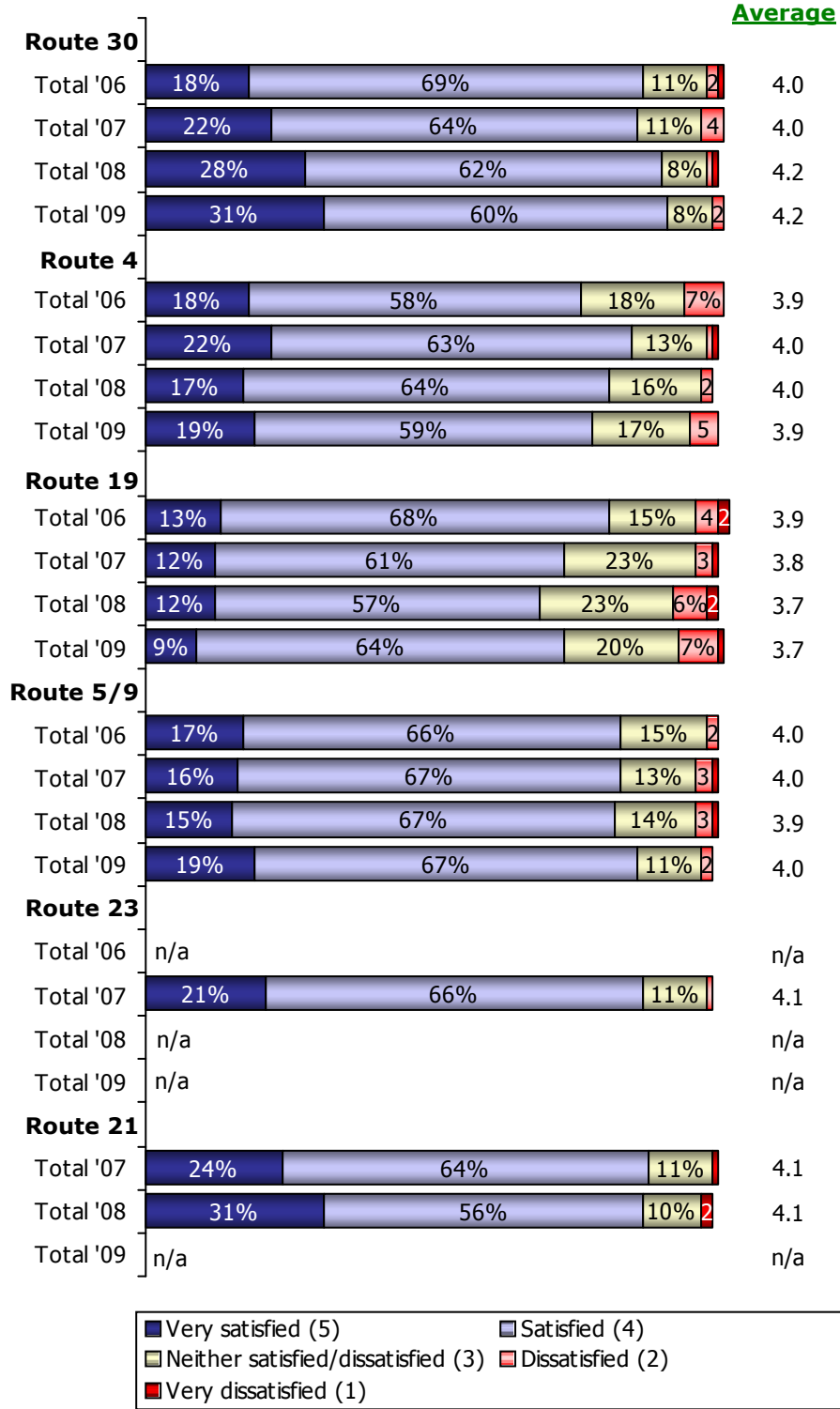
Overall Onboard Experience

A total of 90% of passengers in 2009 were satisfied with their overall experience onboard, for an overall rating of 4.2 on the 5-point scale, which is the highest score achieved to-date. Most routes with the exception of Route 4 have slightly improved scores.

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



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



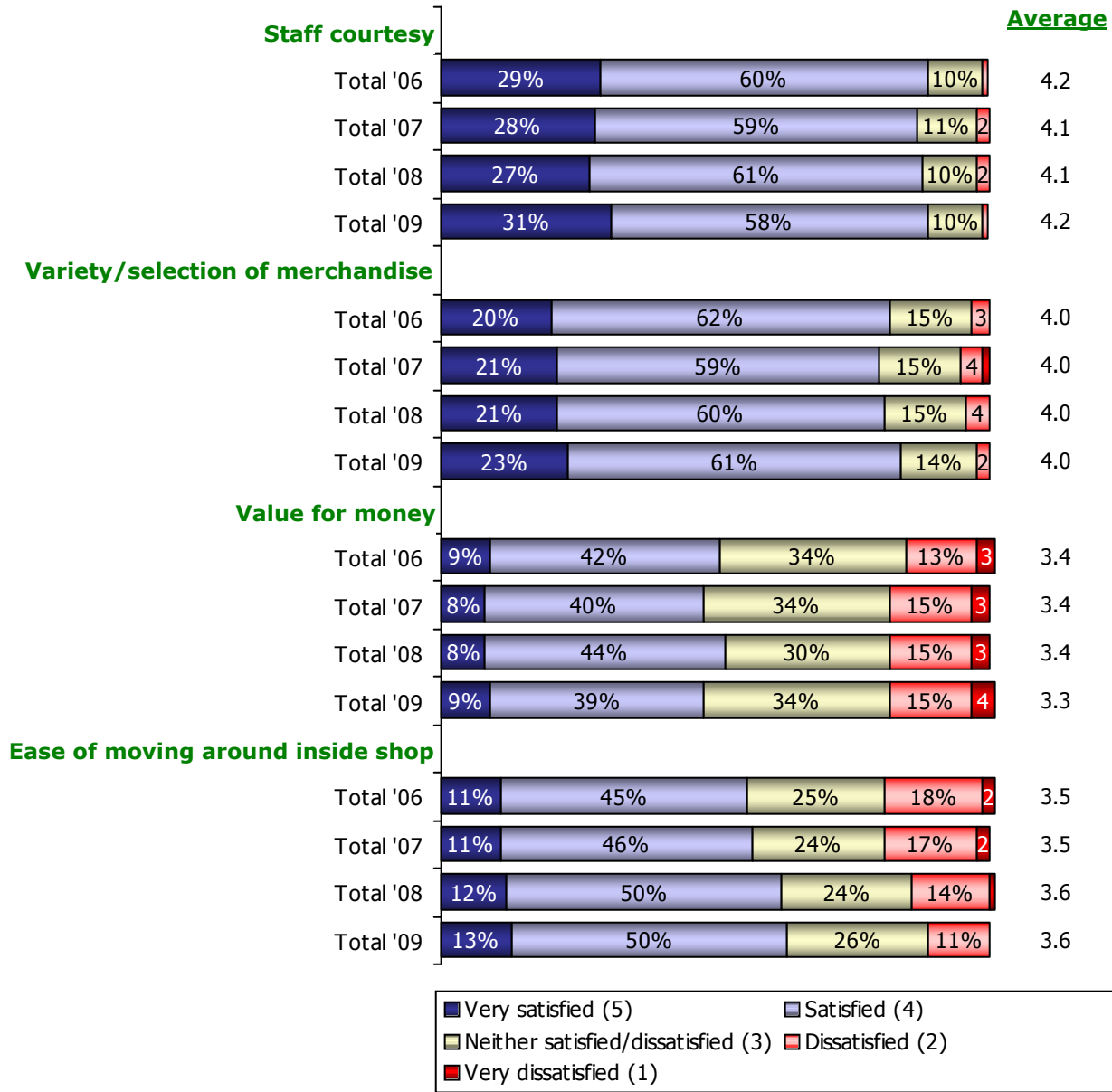
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

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

Onboard Gift Shop/News Stand

Satisfaction levels with different aspects of the onboard gift shop/news stand have been stable but trending upward over the years, with the exception of *value for money*, which shows a slight decline in ratings this year (3.4 to 3.3)

Satisfaction with Aspects of Gift Shop/News Stand Onboard*



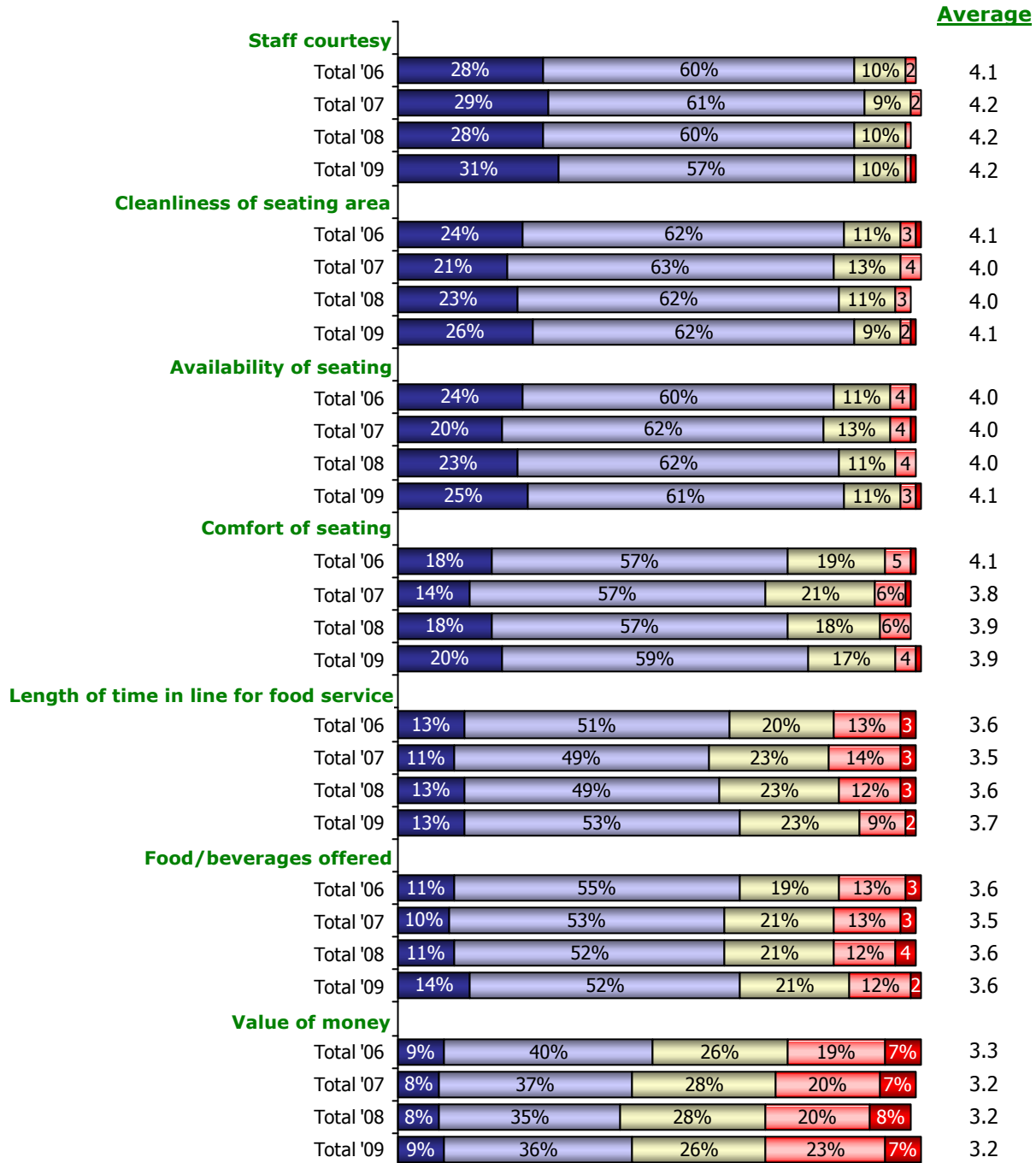
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

* 57% usage; .excludes Routes 4, 19, 21 and 23.

Onboard Food Services

Satisfaction levels with all aspects of onboard food services also continue to trend upwards, with exception of *value for money* for which ratings have been relatively unchanged.

Satisfaction with Aspects of Food and Beverage Services Onboard*



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

* Usage 73%; excludes Routes 4, 19, 21 and 23.

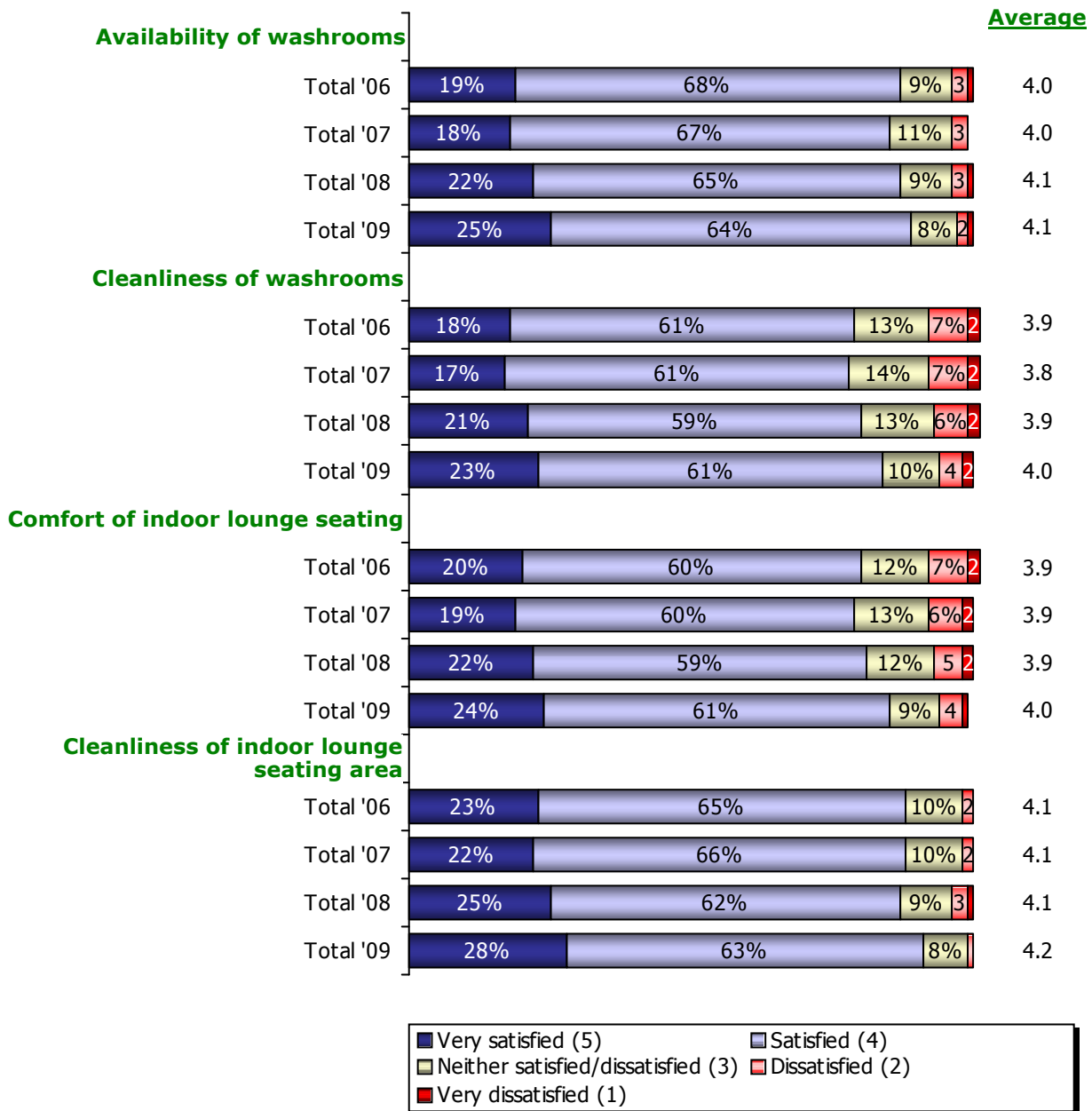


Onboard Washrooms and Onboard Seating

Ratings for *availability of washrooms* have been relatively stable but have improved for *cleanliness* achieving an all time high average score of 4.0.

Ratings have improved for both *comfort* and *cleanliness* of indoor lounge seating reaching average scores of 4.0 and 4.2 respectively.

Satisfaction with Onboard Washrooms and Onboard Seating

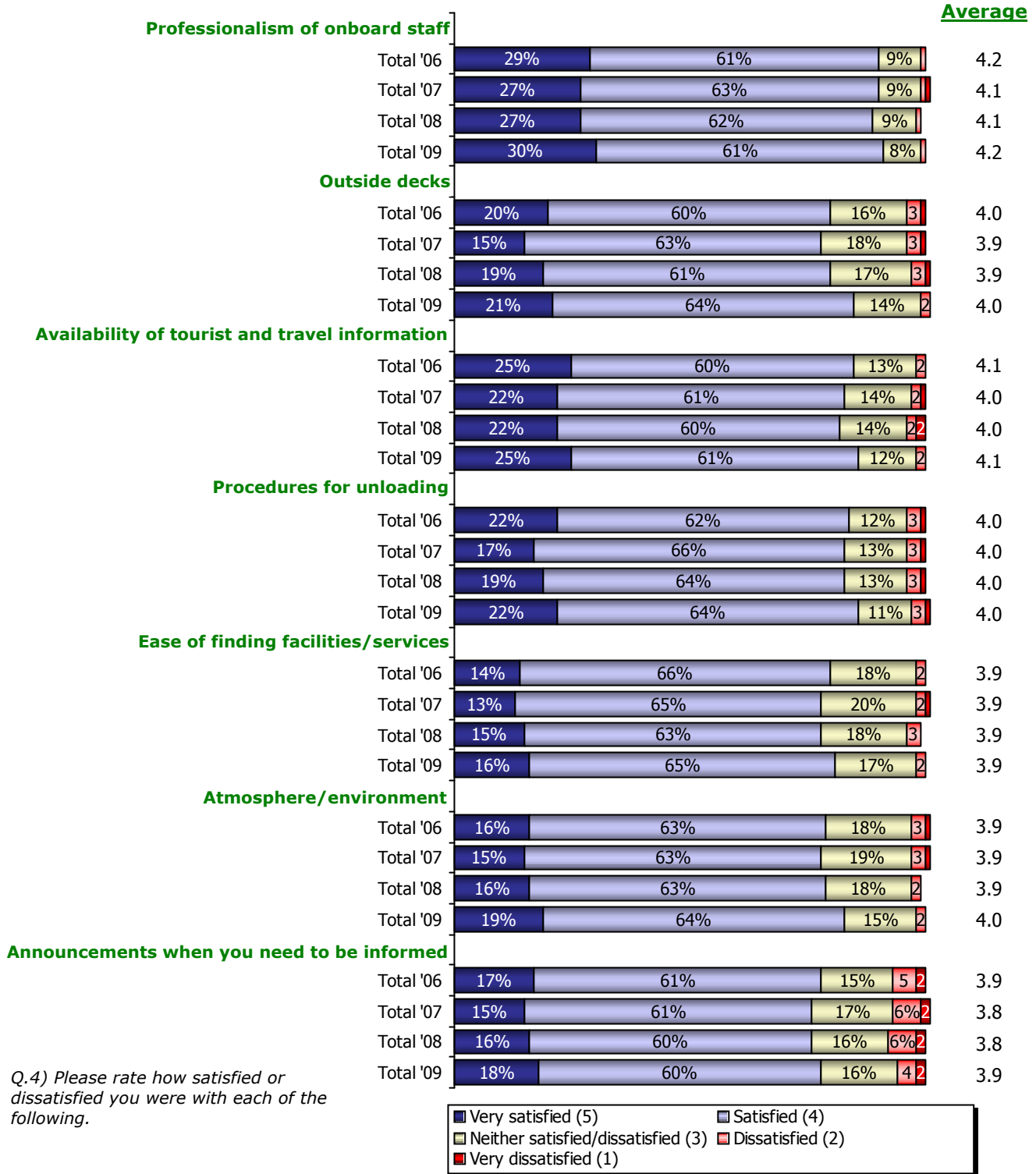


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Other Onboard Facilities/Services

Satisfaction ratings have improved on virtually all other onboard facilities and services, in particular for ease of access for those with disabilities.

Satisfaction with Other Facilities/Services Onboard



Other Onboard Facilities/Services (cont'd)

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



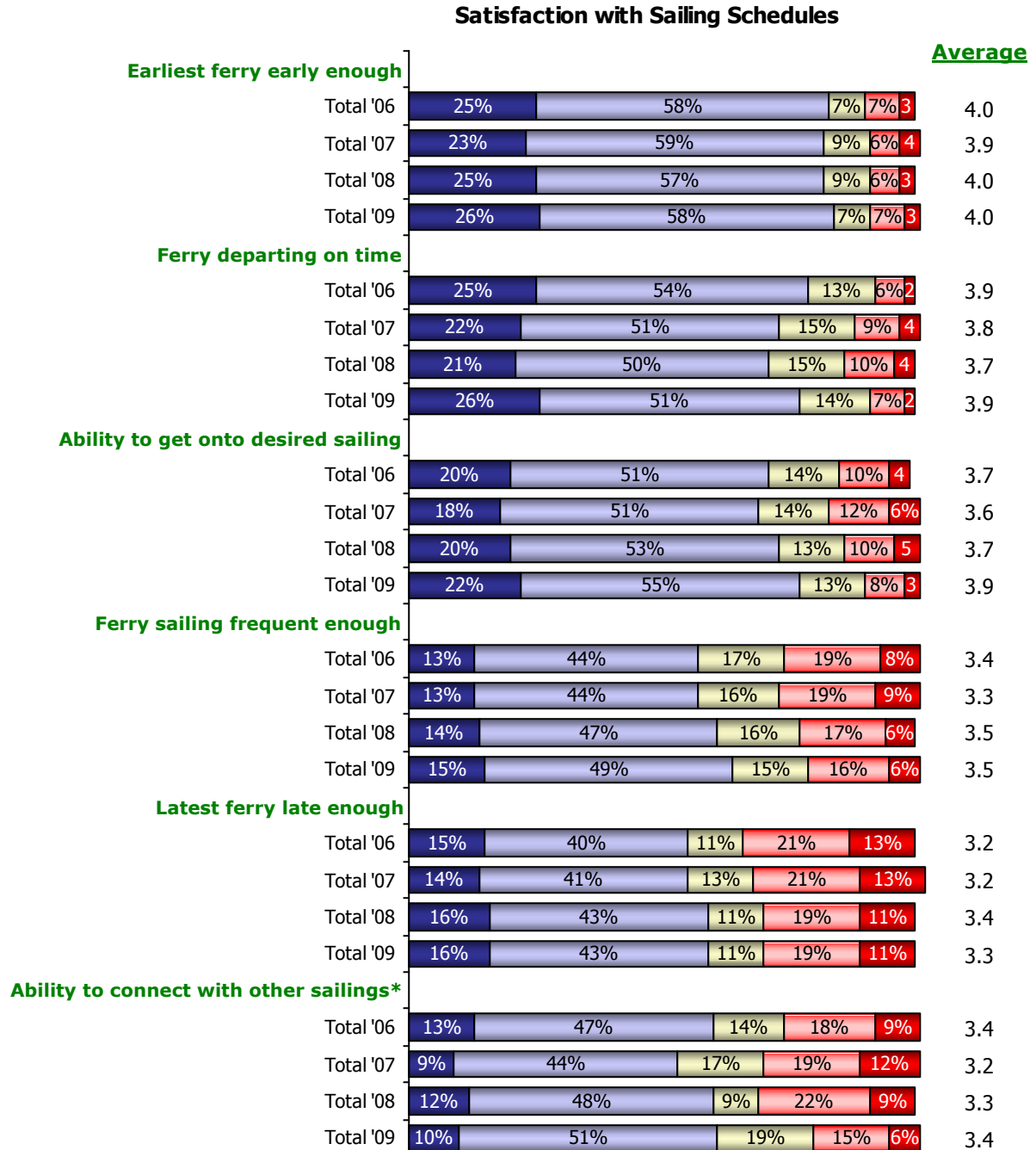
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

* Excludes routes 4, 19, 21 and 23.

Sailing Schedules

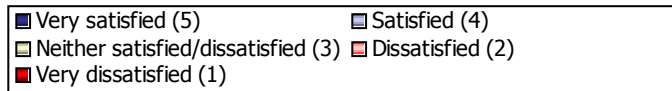
Various Aspects of Sailing Schedules

Ratings have strengthened on many aspects of sailing schedules, most notably for *on-time departures*. But ratings have been static for *earliest ferry early enough* and *latest late enough*.



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

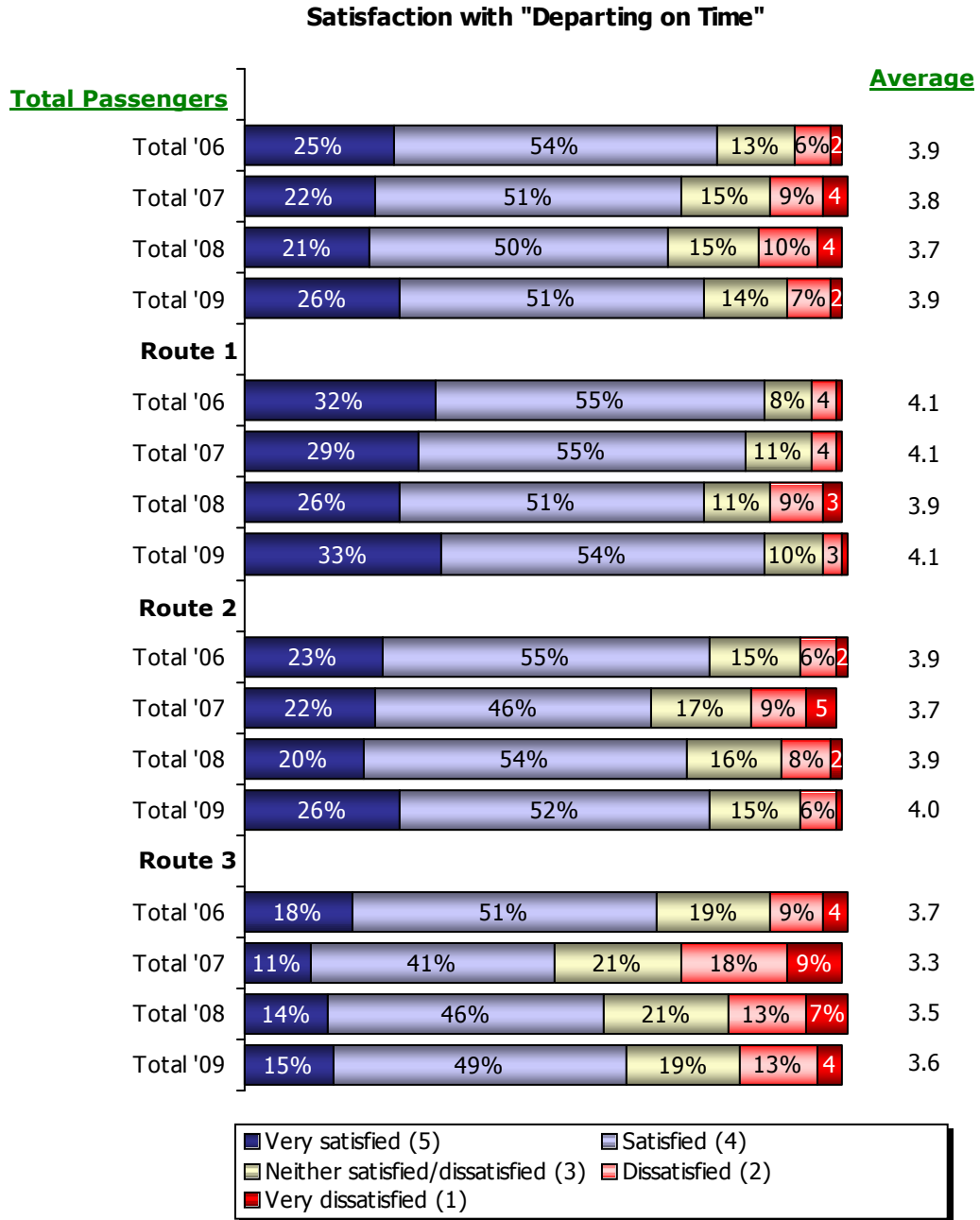
* Based on those connecting (n=374).



Departing on Time

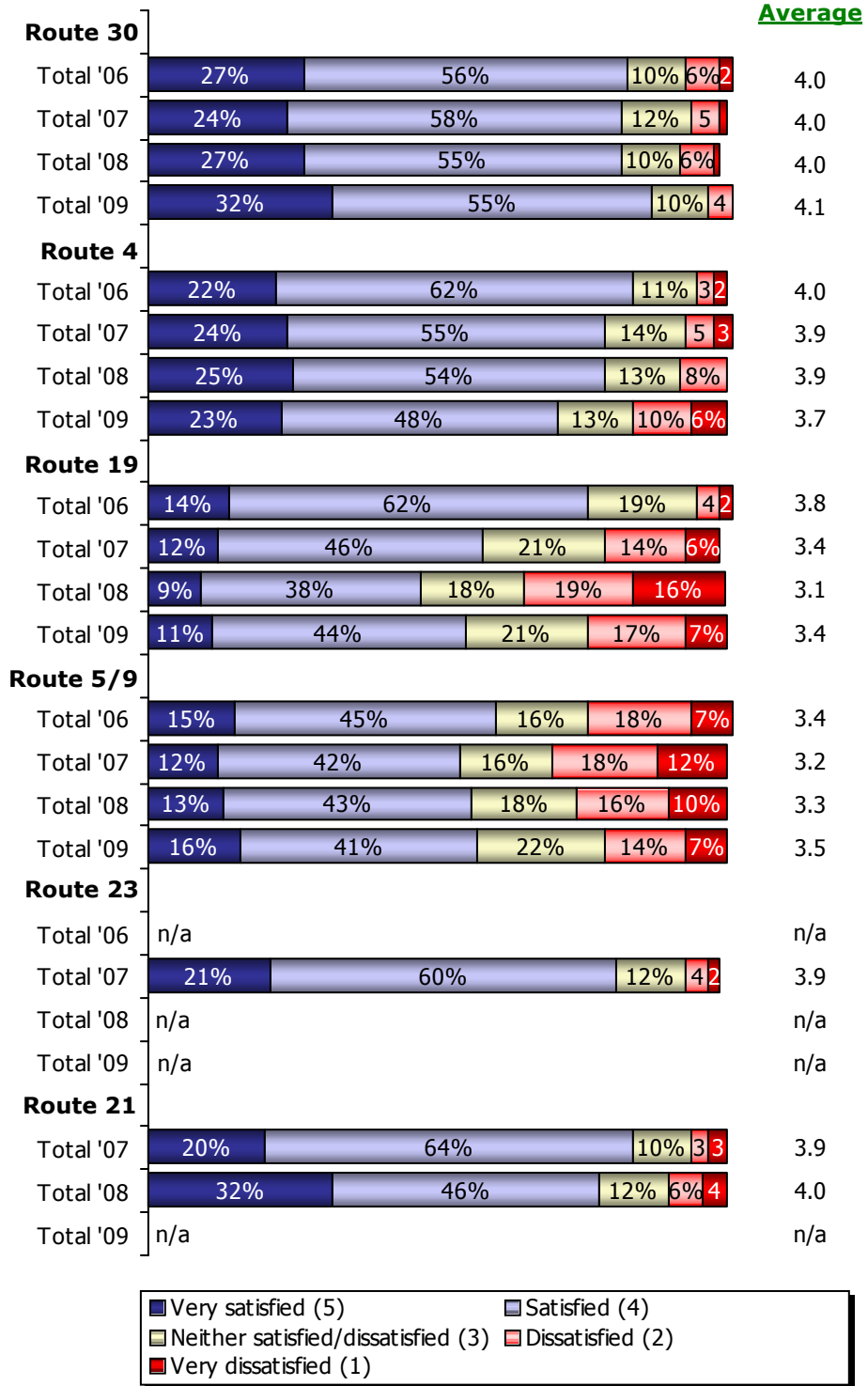
The following graph details the ratings for “departing on time” by route. Improvements have been made on virtually all routes with the exception of Route 4 where in fact ratings have slipped.

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



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

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



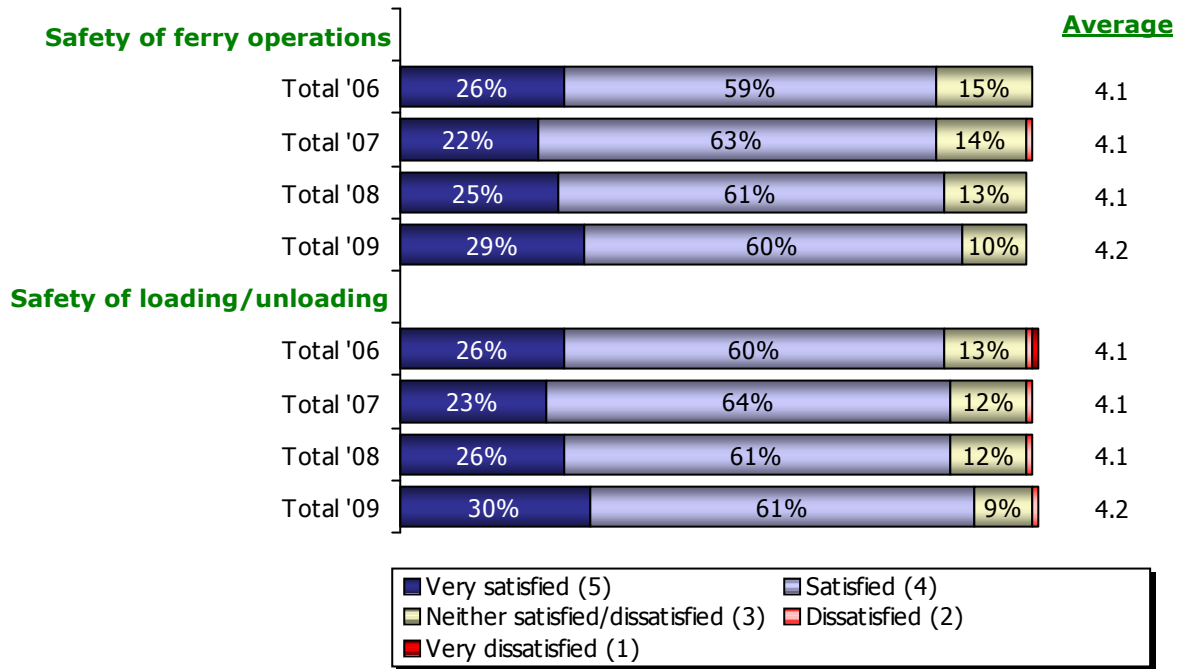
Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

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

Safety

Perceptions of safety continue to be relatively strong with average scores in fact increasing over the past year to their highest level ever (4.2).

Satisfaction with Aspects of Safety

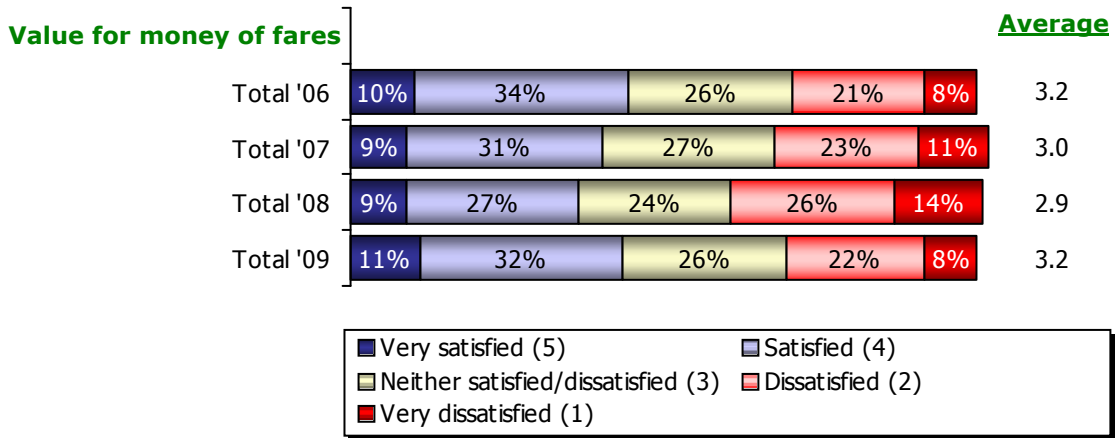


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Overall Value

Ratings declined for *value for money of fares* in 2007 and 2008; however, in the past year the rating has rebounded to a level witnessed in earlier years. The decrease in fuel surcharges and introduction of the CoastSaver program, combined with improvement to services have likely contributed to this upturn.

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 - 2009	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay–Descanso Bay, Gabriola Island
Route 21	Denman-Buckley Bay
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

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

Average Satisfaction Ratings by Route – All Waves 2009
(See page 34 for Route Number Codes)

	Total	Larger Routes				Route	Smaller Routes					
		Total	1	2	30	3	Total	4	19	21	5/9	23
OVERALL EXPERIENCE												
Trip overall	4.3	4.3	4.4	4.2	4.3	4.1	4.1	4.1	3.8	-	4.1	-
BEFORE ARRIVING AT TERMINAL												
Usefulness of BC Ferries website	4.3	4.3	4.3	4.2	4.3	4.2	4.2	4.3	4.1	-	4.2	-
Ease of using on-line reservations	4.1	4.1	4.1	3.9	4.2	4.1	4.1	4.0	3.8	-	4.1	-
Usefulness of BC Ferries phone service	3.7	3.7	3.8	3.7	3.6	3.7	3.7	3.7	3.2	-	3.8	-
Ease of using automated phone service	3.5	3.5	3.5	3.4	3.4	3.5	3.3	3.2	3.0	-	3.5	-
Highway signage	4.0	4.1	4.1	3.8	4.2	3.8	4.0	3.9	3.8	-	4.0	-
TERMINAL EXPERIENCE												
Terminal overall	4.1	4.1	4.2	4.0	4.2	3.9	4.0	4.0	3.6	-	4.1	-
Outside appearance of the terminal	4.0	4.1	4.2	4.0	4.2	3.8	3.9	3.9	3.3	-	4.1	-
Ticket Purchase												
Efficiency of the transaction	4.4	4.5	4.5	4.4	4.5	4.4	4.4	4.4	4.3	-	4.4	-
Staff courtesy	4.4	4.4	4.4	4.4	4.5	4.4	4.4	4.4	4.4	-	4.5	-
Clarity of staff directions	4.4	4.4	4.4	4.3	4.5	4.3	4.3	4.2	4.3	-	4.3	-
Food & Beverage Services at the Terminal												
Food beverages offered	3.6	3.6	3.7	3.5	3.6	3.3	3.3	3.2	-	-	3.3	-
Value for money	3.0	3.1	3.1	2.9	3.1	2.8	2.8	2.8	-	-	2.9	-
Gift Shop/ News Stand at the Terminal												
Variety/ selection of merchandise	3.8	3.8	3.9	3.8	3.9	3.8	3.5	3.3	-	-	3.6	-
Value for money	3.4	3.4	3.4	3.3	3.5	3.4	3.1	3.1	-	-	3.1	-
Outdoor Market Area at the Terminal												
Variety/ selection of merchandise	3.5	3.6	3.7	3.5	3.5	3.4	3.4	3.4	-	-	3.4	-
Value for money	3.3	3.3	3.3	3.2	3.3	3.1	3.2	3.2	-	-	3.2	-
Other Terminal Services												
Clarity of Public address system	3.4	3.5	3.6	3.5	3.5	3.1	3.2	3.4	3.1	-	3.1	-
Announcements when you need to be informed	3.7	3.8	3.8	3.7	3.8	3.4	3.5	3.6	3.3	-	3.5	-
Overall look & décor inside terminal	3.9	4.0	4.0	3.8	4.0	3.6	3.8	3.8	-	-	3.8	-
Usefulness of TV info screens	3.7	3.8	3.8	3.7	3.7	3.6	3.6	3.6	-	-	-	-
Availability of washrooms	4.1	4.1	4.1	4.1	4.1	4.0	3.9	4.0	3.3	-	4.0	-
Cleanliness of washrooms	4.0	4.0	4.0	3.9	4.1	3.9	3.9	4.0	3.1	-	4.0	-
Procedures for loading	4.0	4.1	4.2	4.0	4.1	3.9	3.9	4.0	3.9	-	3.9	-
Professionalism of terminal staff	4.2	4.2	4.2	4.2	4.2	4.1	4.1	4.1	4.2	-	4.1	-

continued...

**Average Satisfaction Ratings by Route – All Waves 2009
(See page 34 for Route Number Codes)**

	Total	Larger Routes			Route 3	Smaller Routes						
		Total	1	2		30	Total	4	19	21	5/9	23
Foot Passenger Services at the Terminal												
Availability of parking spaces	3.8	4.0	4.0	3.8	4.1	3.5	3.3	3.2	2.3	-	3.7	-
Parking value for money	3.0	2.8	2.8	2.8	3.1	3.6	2.9	2.8	3.4	-	2.8	-
Ease of using passenger drop-off/ pick-up area	3.9	3.9	4.0	3.8	4.0	3.9	3.8	3.9	3.1	-	3.9	-
Availability of seating in pre-boarding lounge at terminal	3.6	3.6	3.7	3.4	3.7	3.6	3.7	3.9	3.0	-	3.9	-
Comfort of seating in pre-boarding lounge at terminal	3.6	3.7	3.8	3.4	3.6	3.6	3.5	3.7	2.6	-	3.7	-
Cleanliness of pre-boarding lounge	4.0	4.0	4.1	3.8	4.1	3.9	3.9	4.0	3.3	-	4.0	-
ONBOARD EXPERIENCE												
Onboard overall	4.2	4.2	4.2	4.1	4.2	4.1	4.0	3.9	3.7	-	4.0	-
Gift Shop/ News Stand												
Variety/ selection of merchandise	4.0	4.1	4.0	4.0	4.1	4.1	3.8	-	-	-	3.8	-
Staff courtesy	4.2	4.2	4.2	4.3	4.2	4.2	4.1	-	-	-	4.1	-
Ease of moving around inside shop	3.6	3.6	3.7	3.5	3.8	3.7	3.5	-	-	-	3.5	-
Value for money	3.3	3.3	3.3	3.3	3.5	3.4	3.2	-	-	-	3.2	-
Food Services												
Length of time in line for food services	3.7	3.7	3.6	3.6	3.7	3.6	3.7	-	-	-	3.7	-
Food/ beverages offered	3.6	3.7	3.7	3.6	3.7	3.6	3.3	-	-	-	3.3	-
Staff courtesy	4.2	4.2	4.2	4.1	4.3	4.2	4.1	-	-	-	4.1	-
Availability of seating	4.1	4.1	4.0	4.0	4.2	4.1	4.0	-	-	-	4.0	-
Comfort of seating	3.9	3.9	3.9	3.9	4.0	4.0	3.7	-	-	-	3.7	-
Cleanliness of seating area	4.1	4.1	4.1	4.1	4.2	4.1	4.0	-	-	-	4.0	-
Value for money	3.2	3.2	3.2	3.2	3.3	3.1	3.0	-	-	-	3.0	-
Washrooms												
Availability of washrooms	4.1	4.2	4.2	4.1	4.2	4.1	3.7	3.5	3.0	-	4.0	-
Cleanliness of washrooms	4.0	4.1	4.1	3.9	4.2	4.0	3.7	3.7	2.9	-	4.0	-
Lounge Seating												
Comfort of indoor lounge seating	4.0	4.1	4.2	4.0	4.2	4.0	3.5	3.3	3.1	-	3.7	-
Cleanliness of indoor lounge seating area	4.2	4.2	4.2	4.1	4.3	4.2	3.9	3.8	3.3	-	4.0	-

continued...

Average Satisfaction Ratings by Route – All Waves 2009
(See page 34 for Route Number Codes)

	Total	Larger Routes			Route 3	Smaller Routes						
		Total	1	2		30	Total	4	19	21	5/9	23
Other Onboard Facilities/ Services												
Play area for children	3.6	3.6	3.7	3.7	3.3	3.5	3.1	-	-	-	3.1	-
Video arcade	3.5	3.5	3.6	3.5	3.3	3.4	3.2	-	-	-	3.2	-
Work stations	3.8	3.9	4.0	3.8	3.8	3.8	3.5	-	-	-	3.5	-
Outside decks	4.0	4.1	4.1	4.1	4.1	3.8	3.9	3.8	3.6	-	4.0	-
Outside appearance of the vessel overall	4.0	4.1	4.2	4.0	4.1	3.9	3.8	3.8	3.6	-	3.8	-
Availability of tourist and travel information	4.1	4.1	4.2	4.1	4.2	4.1	3.9	3.8	3.5	-	4.0	-
Ease of access, overall, for people with disabilities	3.8	3.9	3.9	3.8	3.9	3.8	3.2	3.1	2.6	-	3.4	-
Ease of finding facilities/ services	3.9	4.0	4.0	3.9	4.0	4.0	3.7	3.6	3.5	-	3.9	-
Clarity of public address system	3.7	3.8	3.8	3.8	3.8	3.7	3.4	3.4	3.1	-	3.5	-
Announcements when you need to be informed	3.9	4.0	3.9	3.9	4.0	3.9	3.6	3.6	3.3	-	3.7	-
Atmosphere/ environment	4.0	4.1	4.1	4.0	4.1	4.0	3.7	3.6	3.5	-	3.9	-
Procedures for unloading	4.0	4.1	4.1	4.0	4.1	3.9	3.9	3.9	3.8	-	3.8	-
Professionalism with onboard staff	4.2	4.2	4.3	4.2	4.2	4.1	4.1	4.1	4.1	-	4.1	-
Experience with the Sailing Schedule												
Earliest ferry earliest enough	4.0	4.0	4.0	4.1	3.9	4.1	3.9	3.9	4.1	-	3.8	-
Latest ferry late enough	3.3	3.5	3.5	3.4	3.7	2.9	3.3	2.9	3.5	-	3.5	-
Ferry sailing frequent enough	3.5	3.7	3.8	3.5	3.6	3.1	3.2	3.3	3.8	-	3.0	-
Ability to get onto desired ferry	3.9	3.9	4.0	3.8	3.9	3.7	3.7	3.7	3.4	-	3.9	-
Ability to connect with other sailings (based on those connecting)	3.4	3.5	3.6	3.4	3.7	3.3	3.5	3.3	2.4	-	3.8	-
Ferry departing on time	3.9	4.1	4.1	4.0	4.1	3.6	3.5	3.7	3.4	-	3.5	-
Safety												
Safety of ferry operations	4.2	4.2	4.2	4.2	4.2	4.1	4.1	4.1	4.0	-	4.1	-
Safety of loading/unloading	4.2	4.2	4.3	4.2	4.3	4.1	4.1	4.1	4.1	-	4.1	-
OVERALL VALUE												
Value for money of fares	3.2	3.2	3.2	3.1	3.2	3.1	3.1	3.2	2.9	-	3.1	-

TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal- <u>All Waves 2009</u> -									
	Total	Terminals							
		Tsawwassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Denman Island	Buckley Bay
OVERALL EXPERIENCE									
Trip overall	4.3	4.4	4.4	4.2	4.2	4.1	4.3	-	-
TERMINAL EXPERIENCE									
Terminal overall	4.1	4.2	4.1	4.0	3.9	3.9	4.2	-	-
Outside appearance of the terminal	4.0	4.2	4.1	4.0	3.9	3.7	4.1	-	-
Ticket Purchase									
Efficiency of the transaction	4.4	4.5	4.5	4.4	4.4	4.3	4.5	-	-
Staff courtesy	4.4	4.4	4.4	4.4	4.4	4.4	4.5	-	-
Clarity of staff directions	4.4	4.4	4.3	4.3	4.4	4.3	4.5	-	-
Food & Beverage Services at the Terminal									
Food beverages offered	3.6	3.8	3.6	3.4	3.4	3.4	3.4	-	-
Value for money	3.0	3.2	3.0	2.8	2.9	2.9	3.0	-	-
Gift Shop/ News Stand at the Terminal									
Variety/ selection of merchandise	3.8	3.9	3.8	3.8	3.7	4.0	3.8	-	-
Value for money	3.4	3.5	3.3	3.4	3.2	3.5	3.5	-	-
Outdoor Market Area at the Terminal									
Variety/ selection of merchandise	3.5	3.8	3.5	3.4	3.5	3.4	3.3	-	-
Value for money	3.3	3.4	3.3	3.0	3.3	3.1	3.3	-	-
Other Terminal Services									
Clarity of Public address system	3.4	3.5	3.6	3.4	3.5	3.1	3.7	-	-
Announcements when you need to be informed	3.7	3.8	3.8	3.6	3.7	3.5	3.9	-	-
Overall look & décor inside terminal	3.9	4.1	4.0	3.7	3.9	3.5	4.0	-	-
Usefulness of TV info screens	3.7	3.8	3.8	3.6	3.6	3.6	3.7	-	-
Availability of washrooms	4.1	4.1	4.1	4.1	4.0	4.0	4.2	-	-
Cleanliness of washrooms	4.0	4.0	4.0	3.8	4.0	3.9	4.1	-	-
Procedures for loading	4.0	4.1	4.2	4.0	4.0	3.9	4.1	-	-
Professionalism of terminal staff	4.2	4.3	4.2	4.1	4.2	4.1	4.2	-	-
Foot Passenger Services at the Terminal									
Availability of parking spaces	3.8	4.0	3.9	3.6	4.1	3.5	4.0	-	-
Parking value for money	3.0	2.8	2.9	3.0	2.9	3.8	2.9	-	-
Ease of using passenger drop-off/ pick-up area	3.9	4.0	4.0	3.9	3.7	3.9	4.0	-	-
Availability of seating in pre-boarding lounge at terminal	3.6	3.6	3.8	3.5	3.4	3.5	4.0	-	-
Comfort of seating in pre-boarding lounge at terminal	3.6	3.7	3.9	3.5	3.4	3.5	3.7	-	-
Cleanliness of pre-boarding lounge	4.0	4.0	4.2	3.8	3.8	3.9	4.2	-	-
OVERALL VALUE									
Value for money of fares	3.2	3.2	3.2	3.1	3.1	3.2	3.2	-	-

Research Methodology

Background

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

Project Overview

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

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

Research Objectives

The specific objectives are as follows:

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

Quantitative Tracking Research

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

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

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

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

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

Sample Size

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

Routes surveyed and the number of screeners and completed returned surveys from each route during 2009 are as follows:

	All Waves 2009	
	<u>Screeners</u>	<u>Returns</u>
Route 1: Tsawwassen-Swartz Bay	2,038	912
Route 2: Horseshoe Bay-Departure Bay	1,951	667
Route 3: Horseshoe Bay-Langdale	1,193	503
Route 30: Tsawwassen-Duke Point	1,915	789
Route 4: Swartz Bay-Fulford Harbour, Saltspring Island	1,385	563
Route 19: Departure Bay–Descanso Bay, Gabriola Island	960	220
Rout 21: Denman-Buckley Bay	n/a	n/a
Route 5/9: Southern Gulf Islands	3,258	1,422
Route 23: Campbell River-Quadra Island	n/a	n/a
TOTAL	12,700	5,076

Sample Validation and Weighting

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

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

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

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

Actual & Weighted Distribution of the Sample – All Waves 2009 –				
	Screeners		Returns	
	<u>Actual</u> (12,700) %	<u>Weighted</u> (12,700) %	<u>Actual</u> (5,076) %	<u>Weighted</u> (5,076) %
Weekend				
Route:				
1	5	13	6	15
2	5	7	4	6
3	3	5	3	6
30	4	3	4	4
4	3	1	3	1
19	2	1	1	<1
21	n/a	n/a	n/a	n/a
5/9	7	2	7	2
23	n/a	n/a	n/a	n/a
Weekday				
Route:				
1	11	24	12	26
2	11	15	10	13
3	7	12	7	11
30	11	6	11	6
4	8	3	8	3
19	5	3	3	2
21	n/a	n/a	n/a	n/a
5/9	18	5	21	5
23	n/a	n/a	n/a	n/a

Data Collection

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

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

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

Interviewing and questionnaire placements for the November 2009 Wave was completed between November 24 and December 7, 2009.

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 2009.

Response Rates	
<u>All Waves 2009</u>	
Route 1	45
Route 2	34
Route 3	42
Route 30	41
Route 4	41
Route 19	23
Route 21	n/a
Route 5/9	44
Route 23	n/a
Overall response	40

Margin of Error

Overall, the tolerance limits for the 2009 research year at the 95% level of confidence, based on the most conservative case (i.e., a statistic of 50%) are as follows:

Tolerance Limits – All Waves 2009		
	<u>Actual Sample Size</u>	<u>Approximate Tolerance Limits % Points</u>
Total Screeners	12,700	+/- 0.9%
Total Returns	5,076	+/- 1.4%
Individual Route Returns		
Route 1	912	+/- 3.2%
Route 2	667	+/- 3.8%
Route 3	503	+/- 4.4%
Route 30	789	+/- 3.5%
Route 4	563	+/- 4.1%
Route 19	220	+/- 6.6%
Route 21	n/a	n/a
Route 5/9	1,422	+/- 2.6%
Route 23	n/a	n/a

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