

Customer Satisfaction Tracking Annual Report 2008

British Columbia Ferry Services Inc.

Presented to:

British Columbia Ferry Services Inc.
Victoria, British Columbia



MUSTEL GROUP

402 – 1505 West Second Avenue Vancouver BC V6H 3Y4

general@mustelgroup.com www.mustelgroup.com Tel 604.733.4213 Fax 604.733.5221

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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 2008. 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 eight routes in total, both larger and smaller, during three different time periods: June, August and November. In 2008, a total of 13,545 screeners were completed and 5,152 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 86% of passengers in 2008 reported to be satisfied overall with their experience travelling on BC Ferries, similar to the satisfaction level measured in 2007 (88%) with an overall score of 4.1 on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'.
- Ratings are relatively consistent by route with the exception that satisfaction levels have improved on Route 30 with the top box score ('very satisfied') increasing from 31% in 2007 to 37%, likely in response to the addition of the new vessel on this route.
- Although overall satisfaction levels are unchanged from 2007, business travellers are less satisfied this year (77% satisfied compared to 83% in 2007 and 86% in 2006).

Satisfaction before Arriving at Terminal

- Ratings of BC Ferries web site, phone service, reservation's system and highway signage are similar to levels attained in 2007.

Satisfaction at the Terminal

- Overall satisfaction levels with the experience at the terminal before boarding also are similar to a year ago (81% satisfied; 4.0 average score).
- As in the past, passengers who did not get on their desired sailing were less satisfied with their terminal experience, as were those travelling for business purposes, and frequent travellers (who tend to overlap).
- Satisfaction levels with specific terminal services are also quite consistent with 2007 measures.

Satisfaction Onboard

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

- A total of 88% of passengers in 2008 were satisfied with their overall experience onboard, similar to the 2007 level (87%) for an overall rating of 4.1 on the 5-point scale. Ratings which declined slightly in 2007 on Routes 1, 2, 3 and 19 have rebounded on all routes except Route 19 on which ratings have fallen further (3.7 in comparison to 3.9 in the past). Late departures is likely the key reason.
- Further improvements are noted on Route 30 (4.2 average rating in comparison to 4.0 in 2007) with year to year ratings improving most significantly in November. The introduction of the Coastal Inspiration to this route has likely contributed to this increase.
- The new vessels, Coast Renaissance and Coastal Inspiration, receive average satisfaction scores of 4.2 with approximately 30% being 'very' satisfied with their onboard experience.

(Note that sufficient interviews have not been completed on Coastal Celebration for separate reporting.)

- Satisfaction levels with all aspects of onboard services have been stable with the exception that ratings have strengthened slightly for 'ease of moving around the gift shop' with the new vessels posting slightly higher scores (3.7-3.8) than other vessels.

Satisfaction with Sailing Schedules

- Ratings have been relatively consistent to 2007 with respect to sailing schedule attributes, although there were challenges in August with on-time departures.

Satisfaction with Safety

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

Satisfaction with Overall Value

- Satisfaction levels continue to decline with respect to value for money of fares, with the 2008 average rating falling to 2.9 from 3.0 in 2007 and from 3.2 in 2006.

Key Conclusions

Satisfaction levels overall and on specific attributes and services have been stable with BC Ferries continuing to perform particularly well in the following areas:

- Staff in all areas
- Usefulness of the web site
- Ease of using on-line reservations
- Highway signage
- All aspects of the ticket purchase
- Availability of terminal and onboard washrooms
- Variety/selection in onboard gift shop/ news stand
- Availability and cleanliness of seating area of onboard food/beverage services
- Cleanliness of onboard lounge seating
- Availability of tourist and travel info
- Procedures for loading and unloading
- Safety of ferry operations and loading/unloading

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

- Value for money of fares, parking, food/beverages, and retail merchandise
- On-time departures
- Sailing frequency
- Latest ferry late enough
- Ability to connect
- Ease of using automated phone system
- Look/décor inside terminal
- Clarity of public address system
- Usefulness of TV screens
- Comfort/availability of seating for foot passengers
- Food/beverages offered at the terminal and onboard
- Ease of access for people with disabilities
- Problem resolution

The key drivers of dissatisfaction continue to be related to late departures, sailing frequency, and perceived value for money. Perceptions of the value of fares in particular declined following two significant tariff adjustments in 2008. In April 2008 fares were increased by 7.3% on major routes and 4.0% on minor routes followed in August 2008 by implementation of a fuel surcharge of 10.3% on major routes and 17.6% on minor routes.

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 - 2008	
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

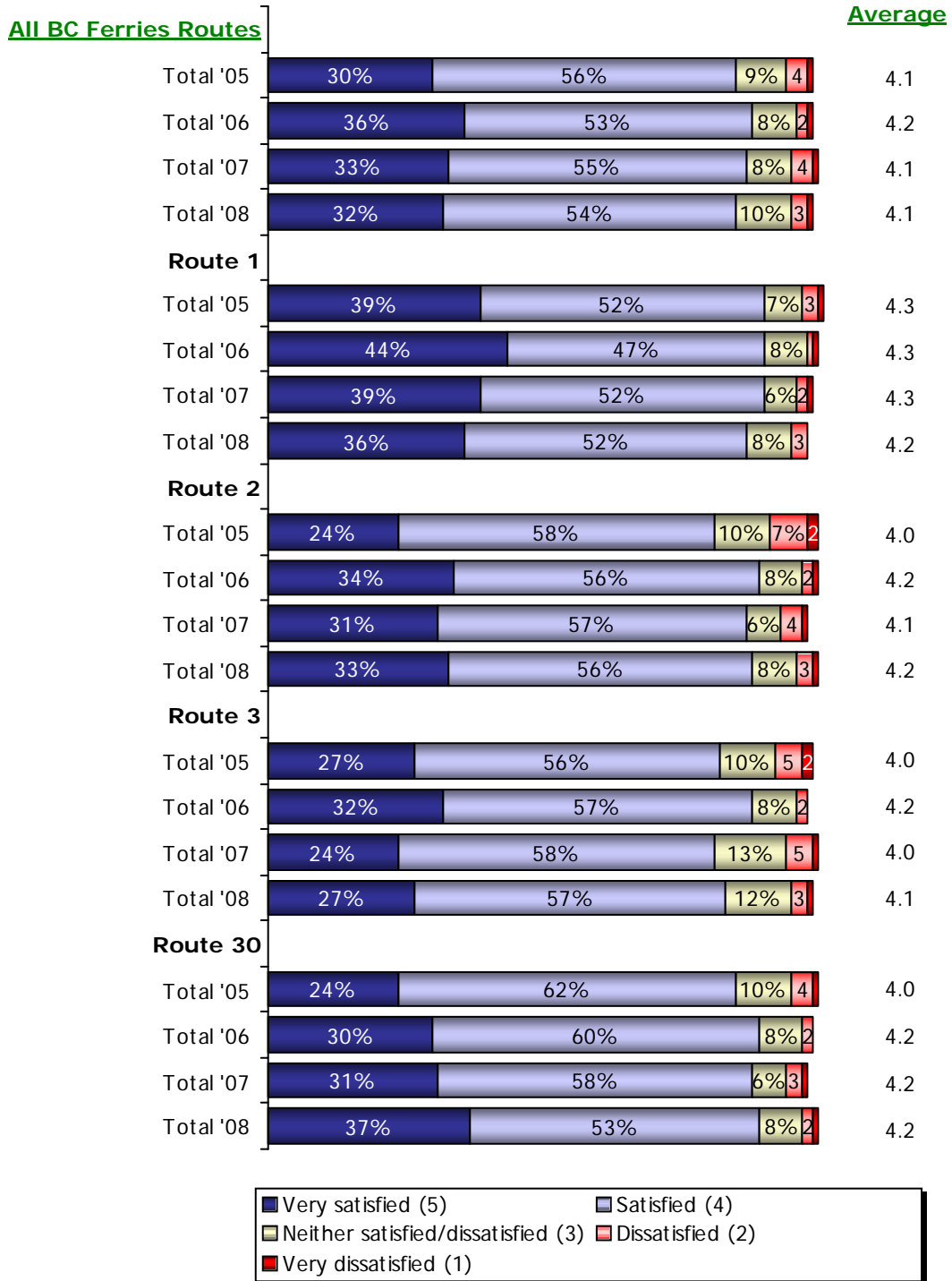
Overall Satisfaction with BC Ferries

A total of 86% of passengers in 2008 reported to be satisfied overall with their experience travelling on BC Ferries, similar to the satisfaction level measured in 2007 (88%) with an overall score of 4.1 (on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied').

Ratings are relatively consistent by route with the exception that satisfaction levels have improved on Route 30 with the top box score ('very satisfied') increasing from 31% in 2007 to 37%, likely in response to the addition of the new vessel on this route.

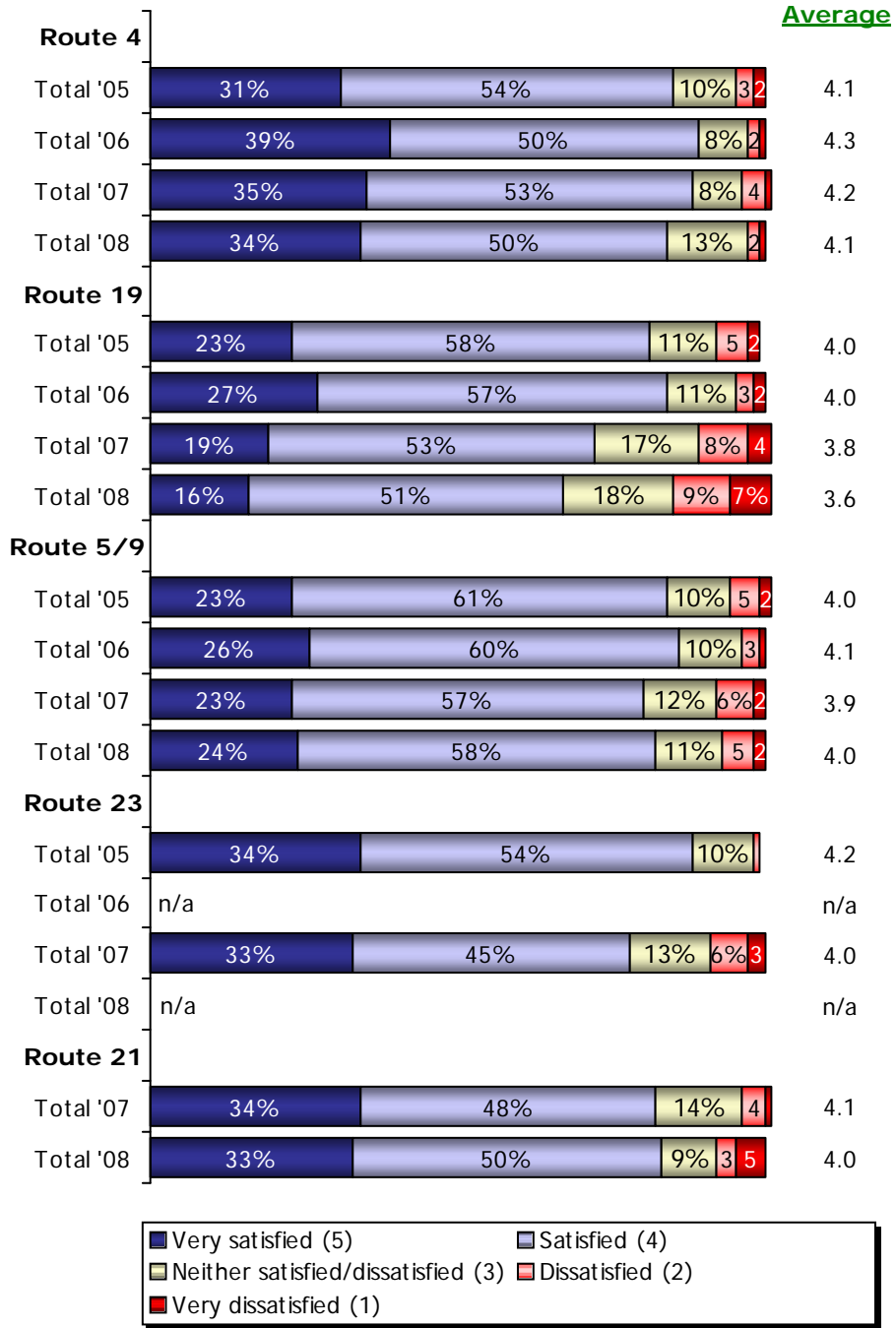
[NOTE: Refer to page 5 for route number codes]

Overall Satisfaction Level with Recent Experience Travelling with BC Ferries



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

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

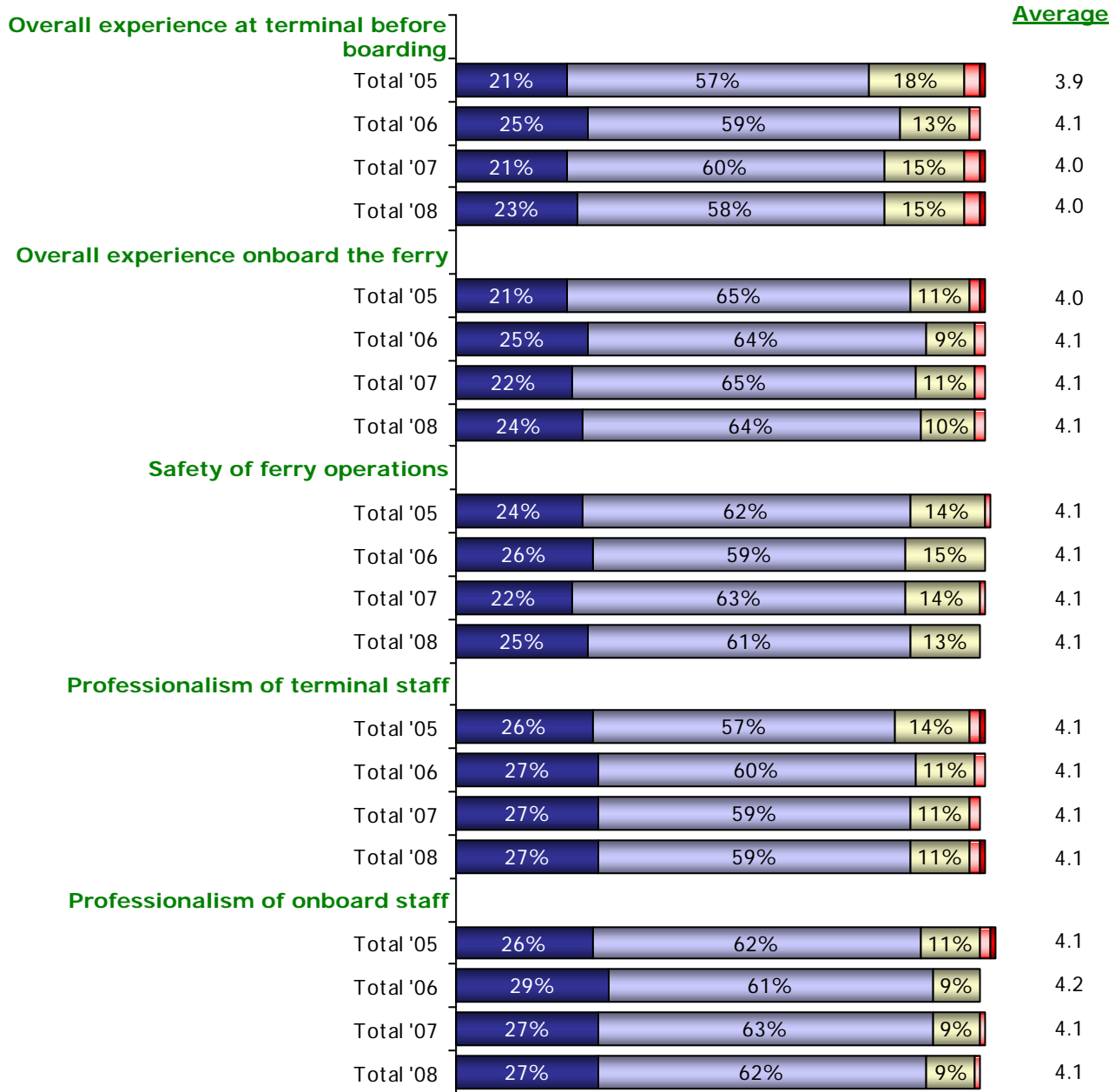


Q.1) How satisfied or dissatisfied were you, overall, with your recent experience travelling with BC Ferries?

Note: Route 23 not surveyed in 2006 and 2008.

The following chart summarizes the results from overall measures of each main point of contact and specifically with BC Ferries staff. As a whole, performance ratings have remained stable on most key measures.

Summary of Main Satisfaction Scores



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



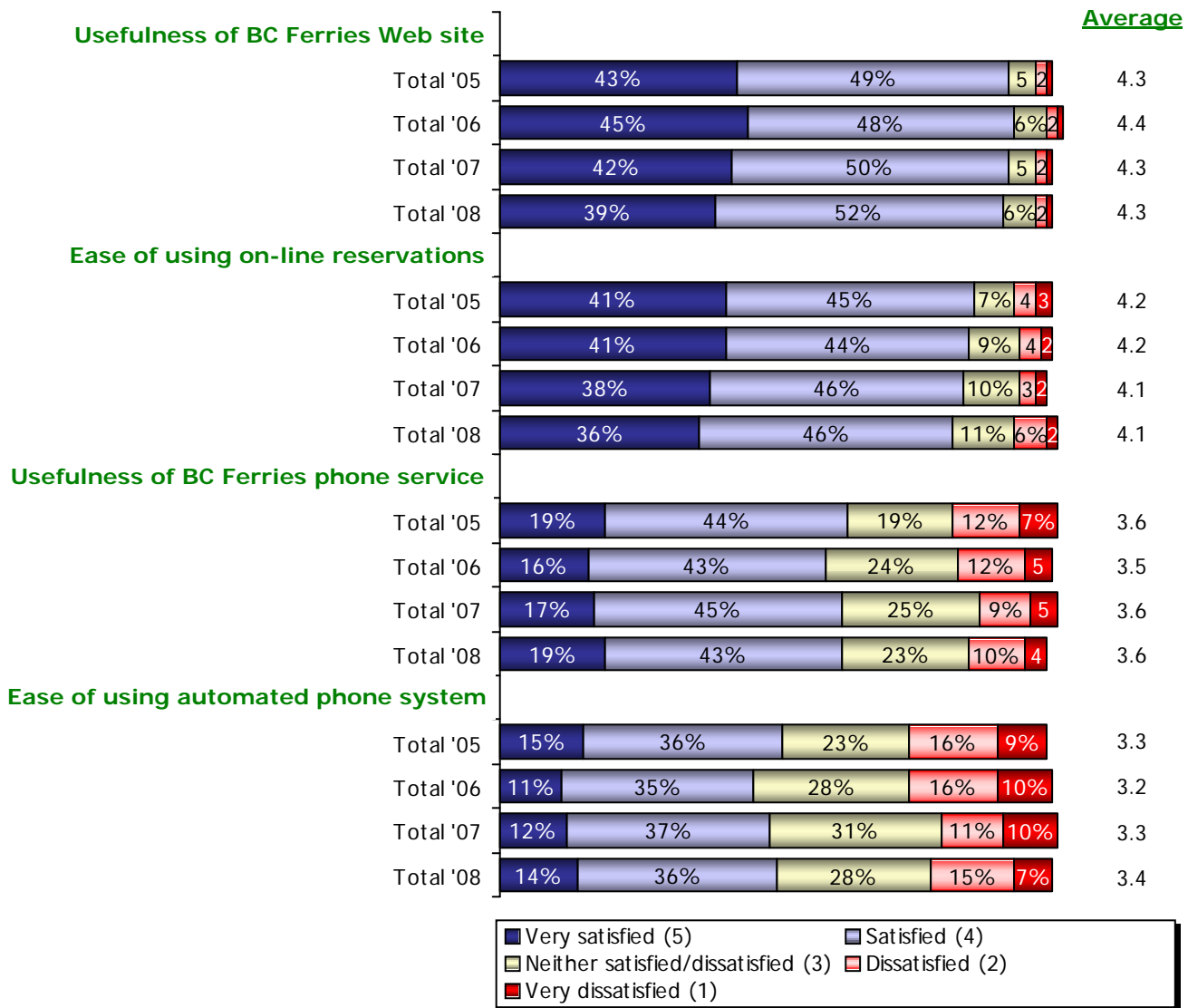
Before Arriving at Terminal

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 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*, with ratings unchanged from a year ago.

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



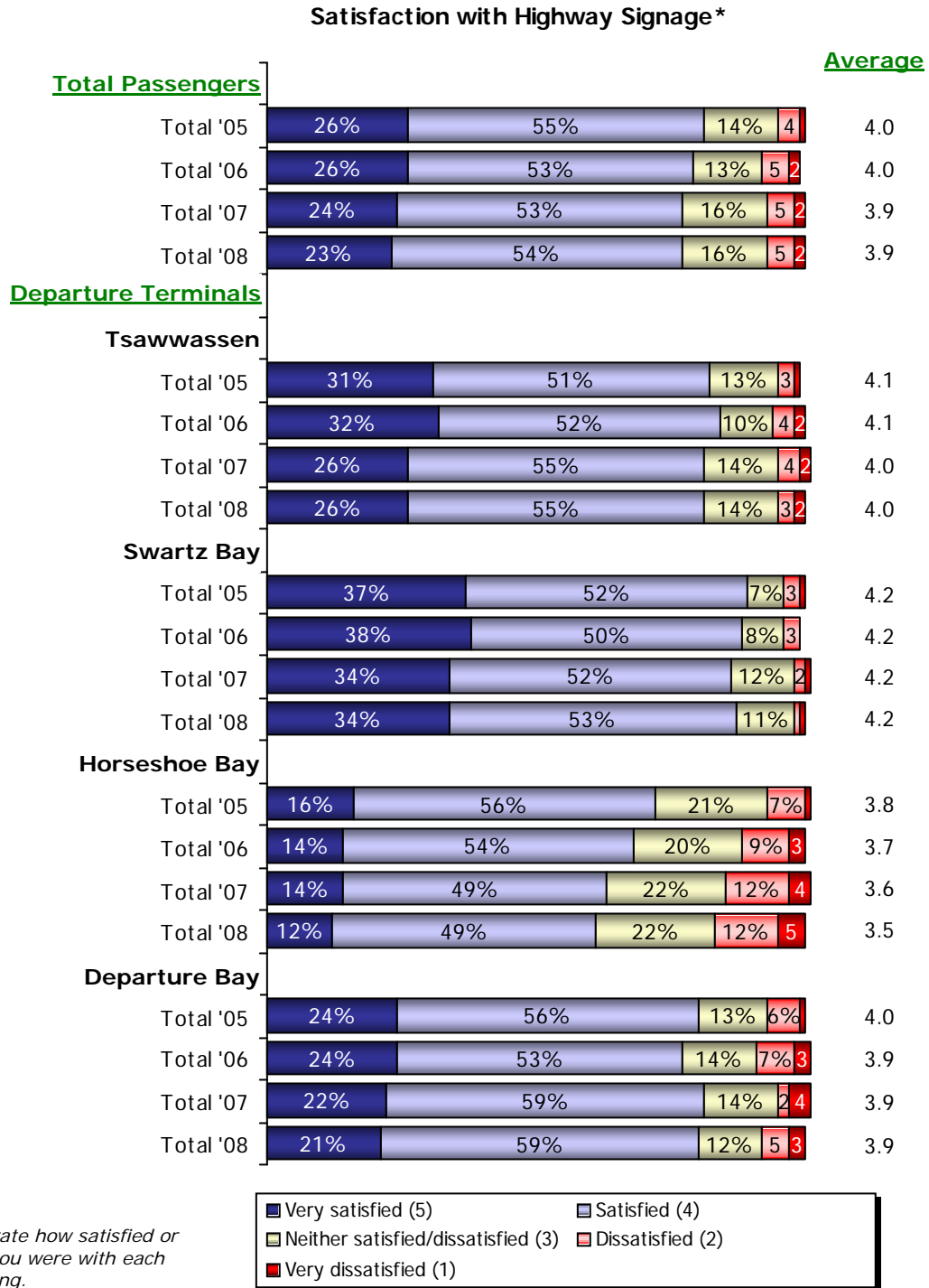
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* 65% usage Web site, 36% for on-line reservations

** 25% usage phone service, 22% for automated system

Highway Signage

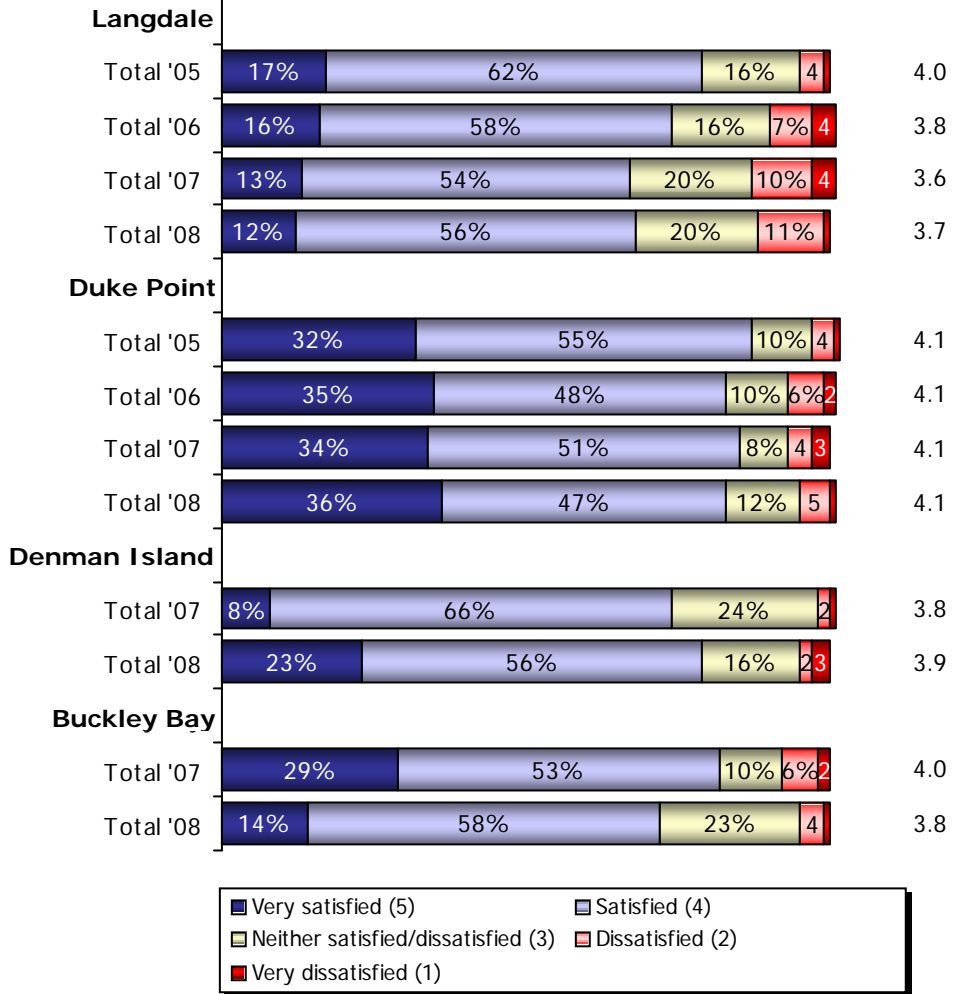
Satisfaction levels with highway signage also have been stable with passengers continuing to be most critical of signage at Horseshoe Bay and Langdale. (Note that due to limited base sizes, changes in ratings at Denman Island and Buckley Bay are not statistically significant.)



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

Departure Terminals

Average



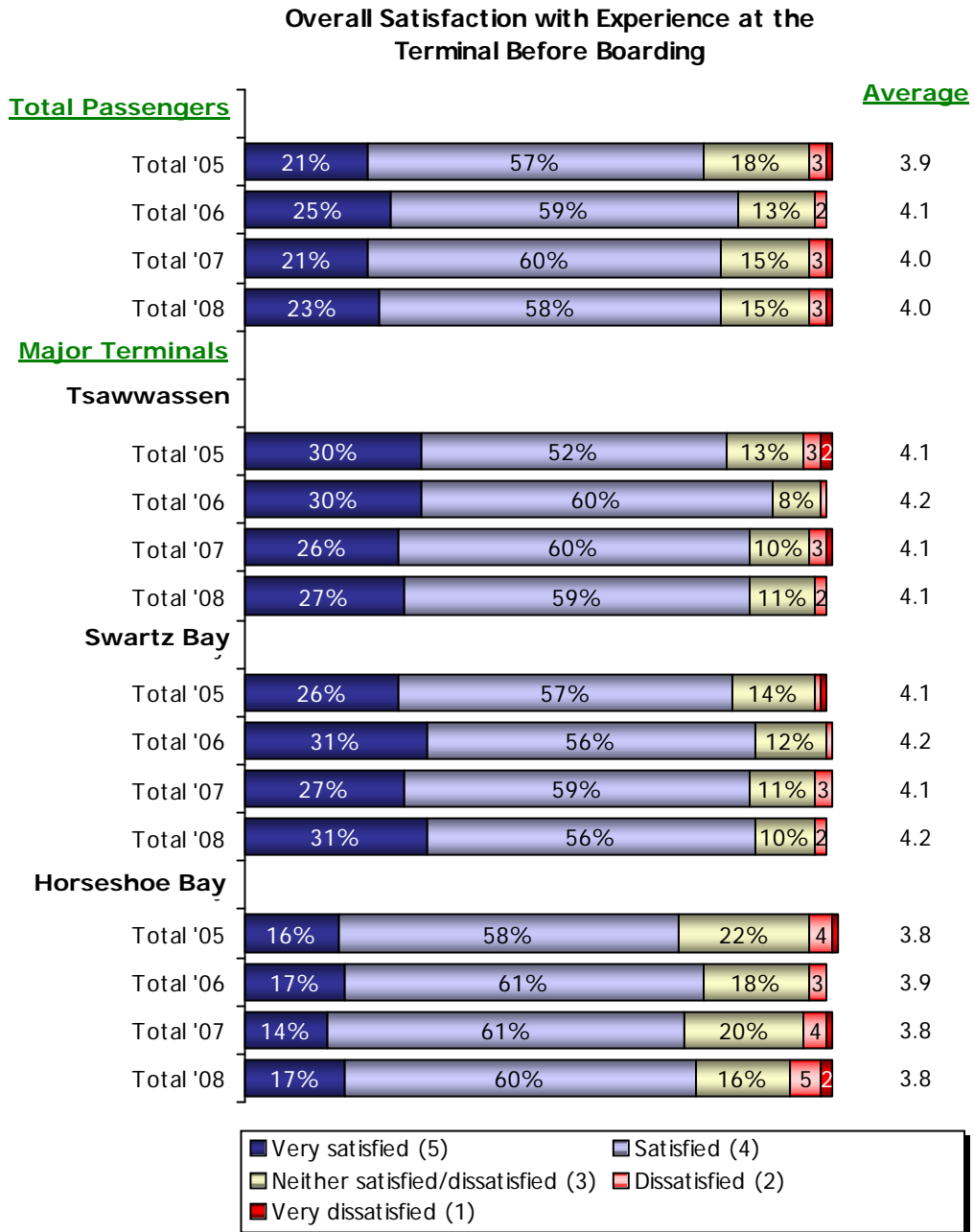
Q.2) Please rate how satisfied or dissatisfied you were with each of the following.

* Usage: 78%

At the Terminal

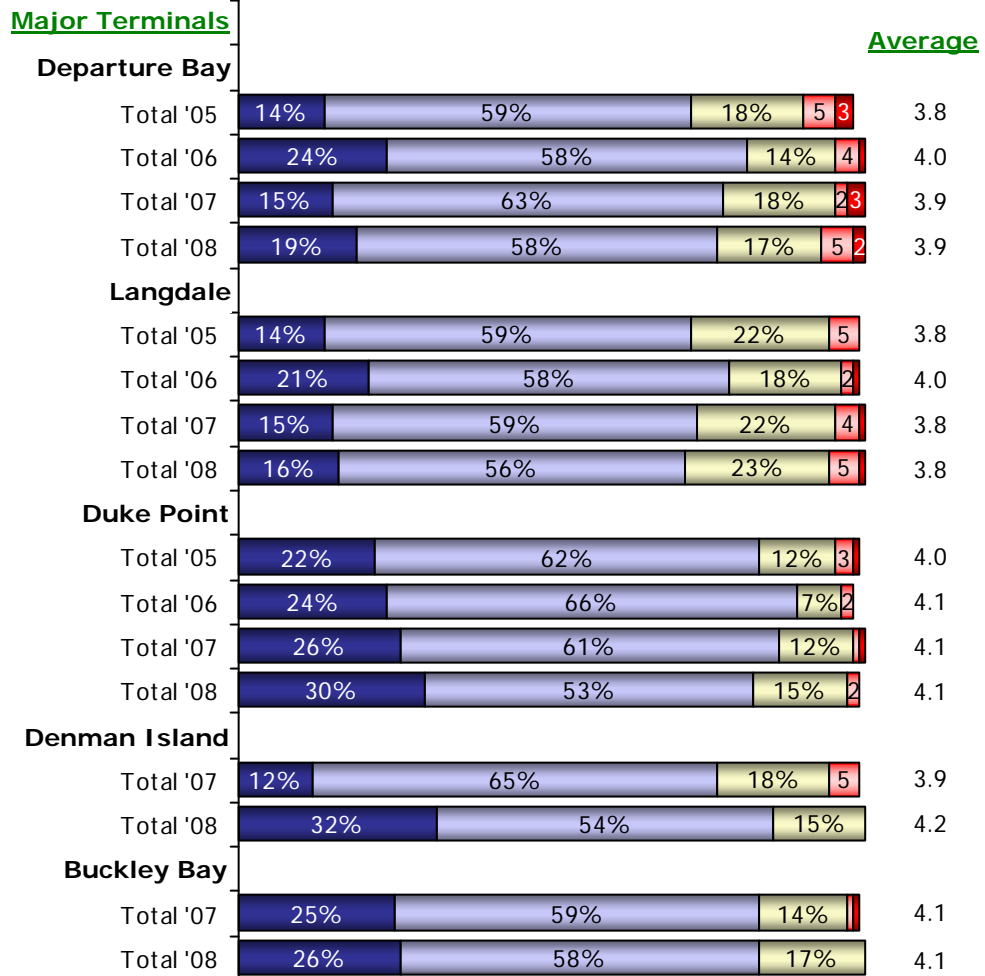
Overall Experience at the Terminal

Overall satisfaction levels with experience at the terminal before boarding are similar to a year ago (81% satisfied; 4.0 average score). Furthermore ratings are relatively consistent by terminal to previous years.



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

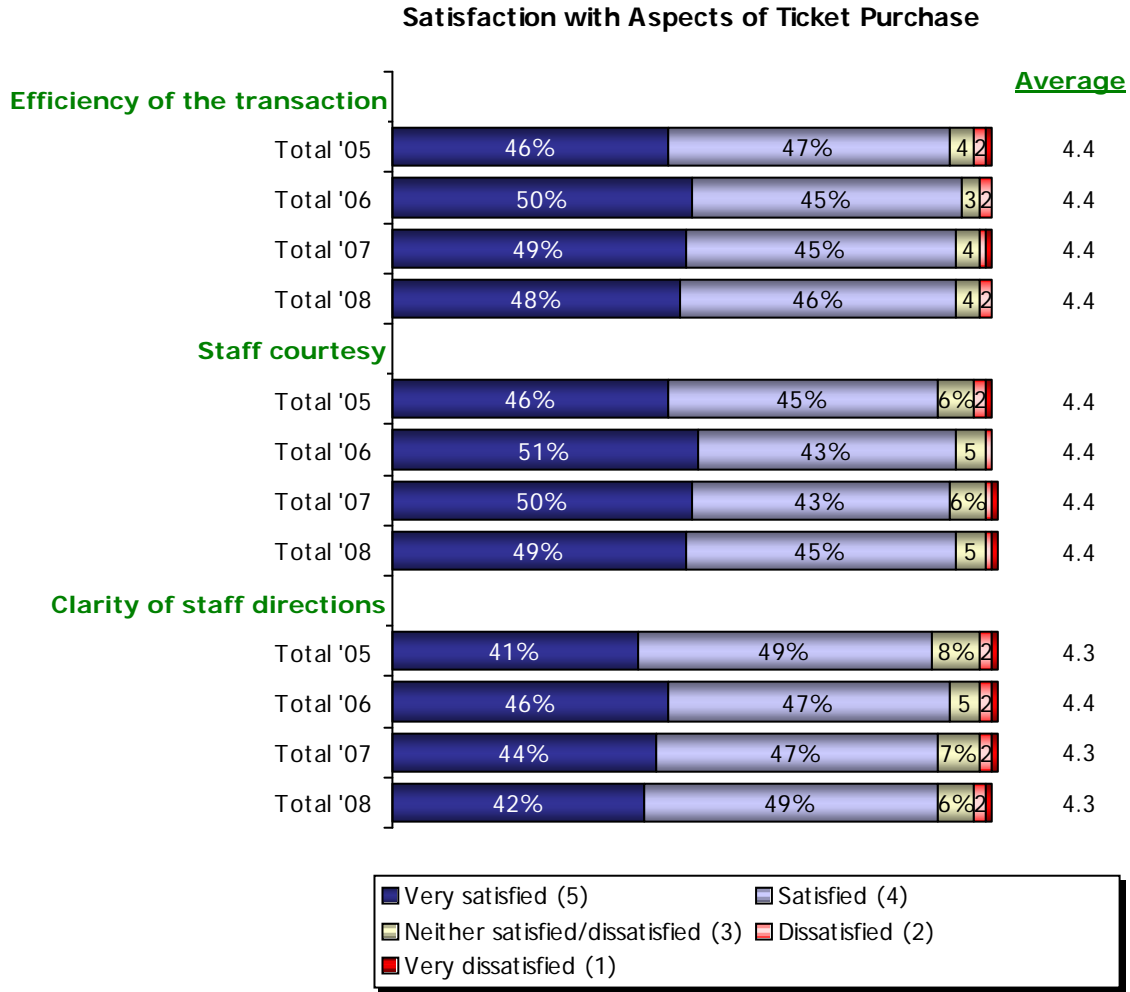
Overall Satisfaction with Experience at the Terminal Before Boarding (cont'd)



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

Ticket Purchase

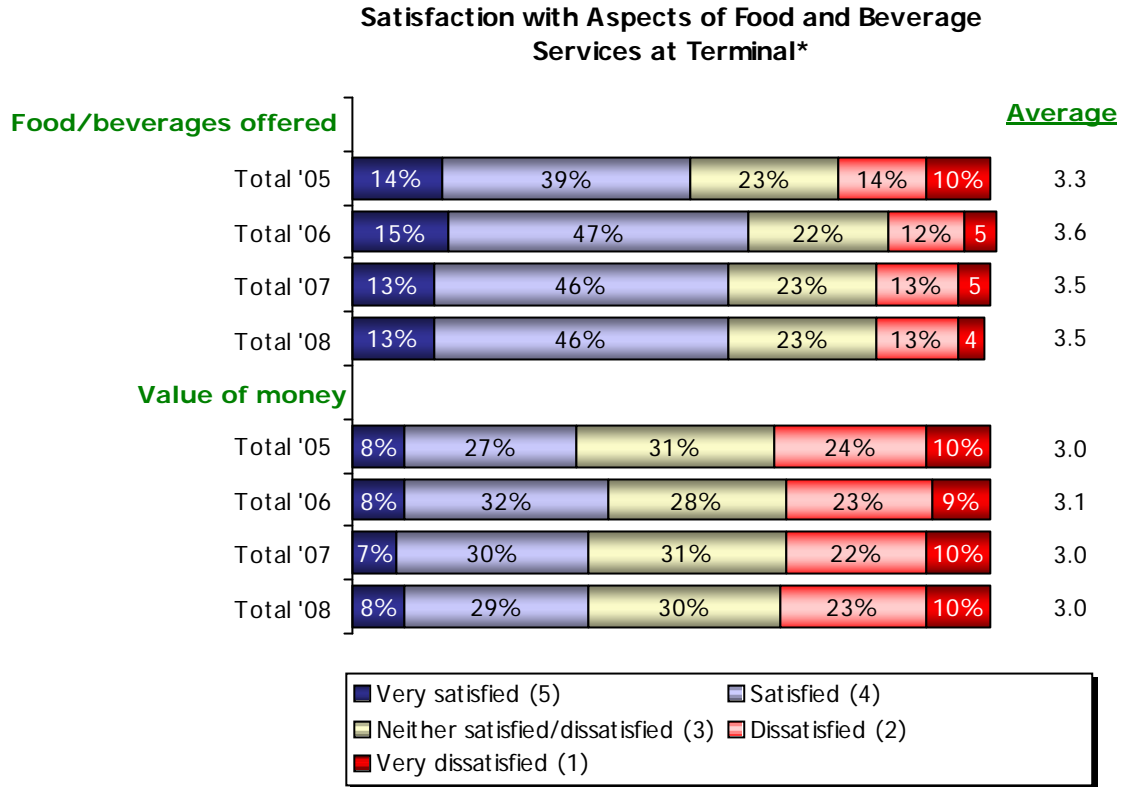
Satisfaction levels continue to be high with all aspects of the ticket purchase process with average ratings more or less similar to a year ago.



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.

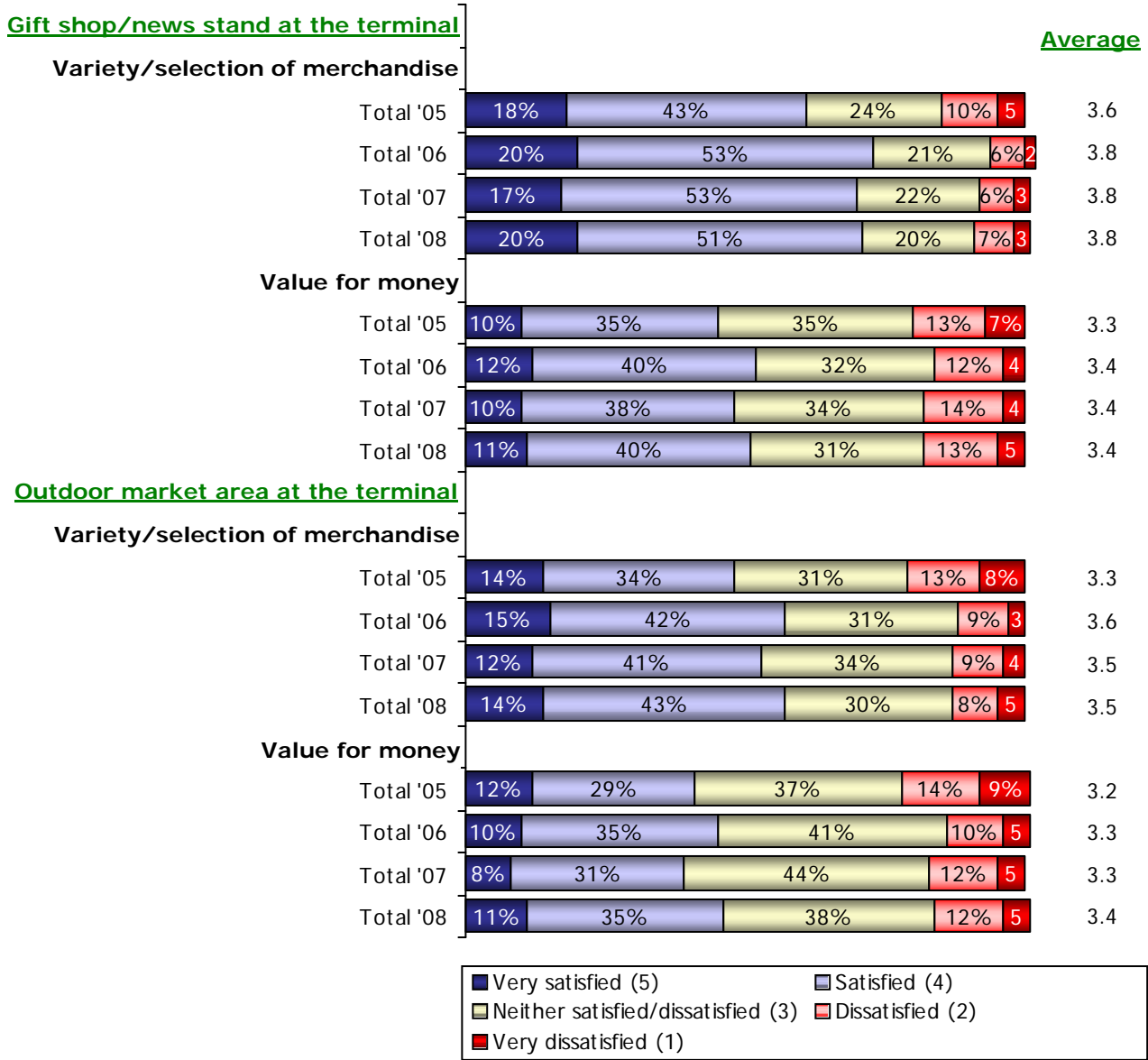
* 44% usage overall; excluding routes 19, 21 and 23.

Retail Services at Terminal

Similarly, satisfaction ratings are not statistically different from 2007 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, however we do note a slight improvement in value perceptions.

Satisfaction with Aspects of Retail Services at Terminal*



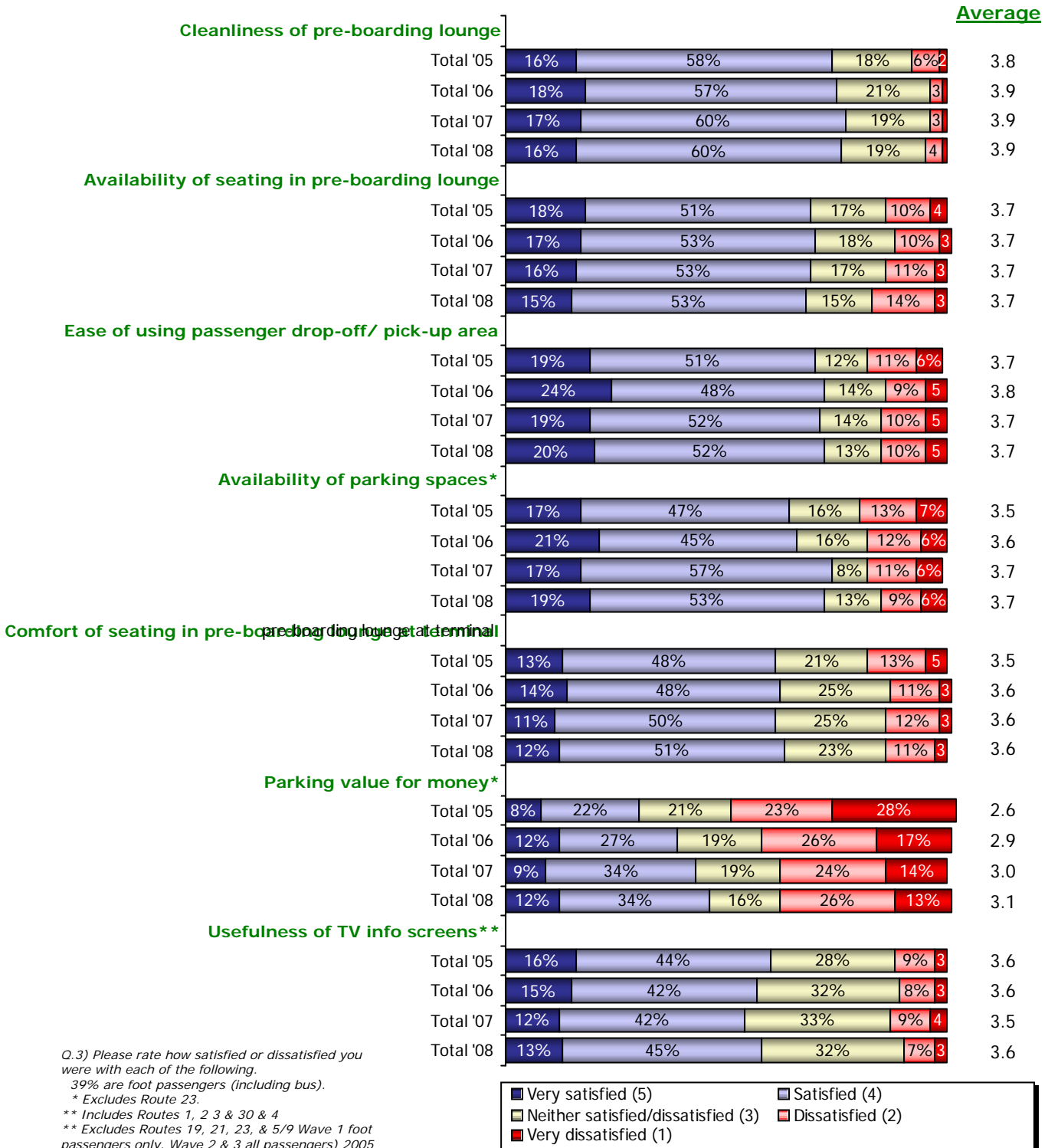
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

* 36% usage gift shop, 23% usage outdoor market; excludes route 19, 21 and route 23.

Foot Passenger Services

Overall, there have been no dramatic changes in satisfaction levels with foot passenger services since 2007.

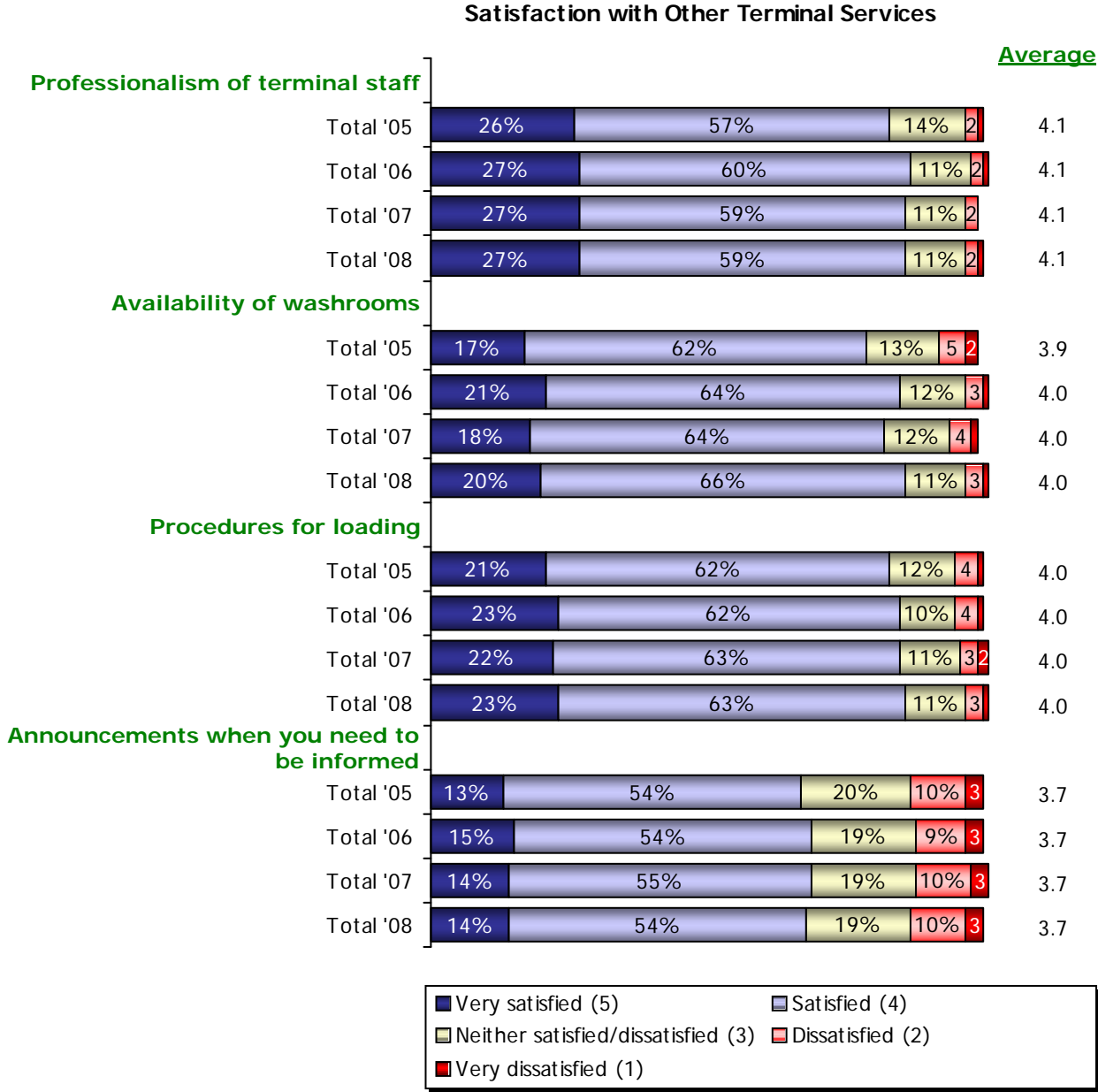
Satisfaction with Foot Passenger Services*



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.
 * 39% are foot passengers (including bus).
 * Excludes Route 23.
 ** Includes Routes 1, 2, 3 & 30 & 4
 ** Excludes Routes 19, 21, 23, & 5/9 Wave 1 foot passengers only, Wave 2 & 3 all passengers) 2005

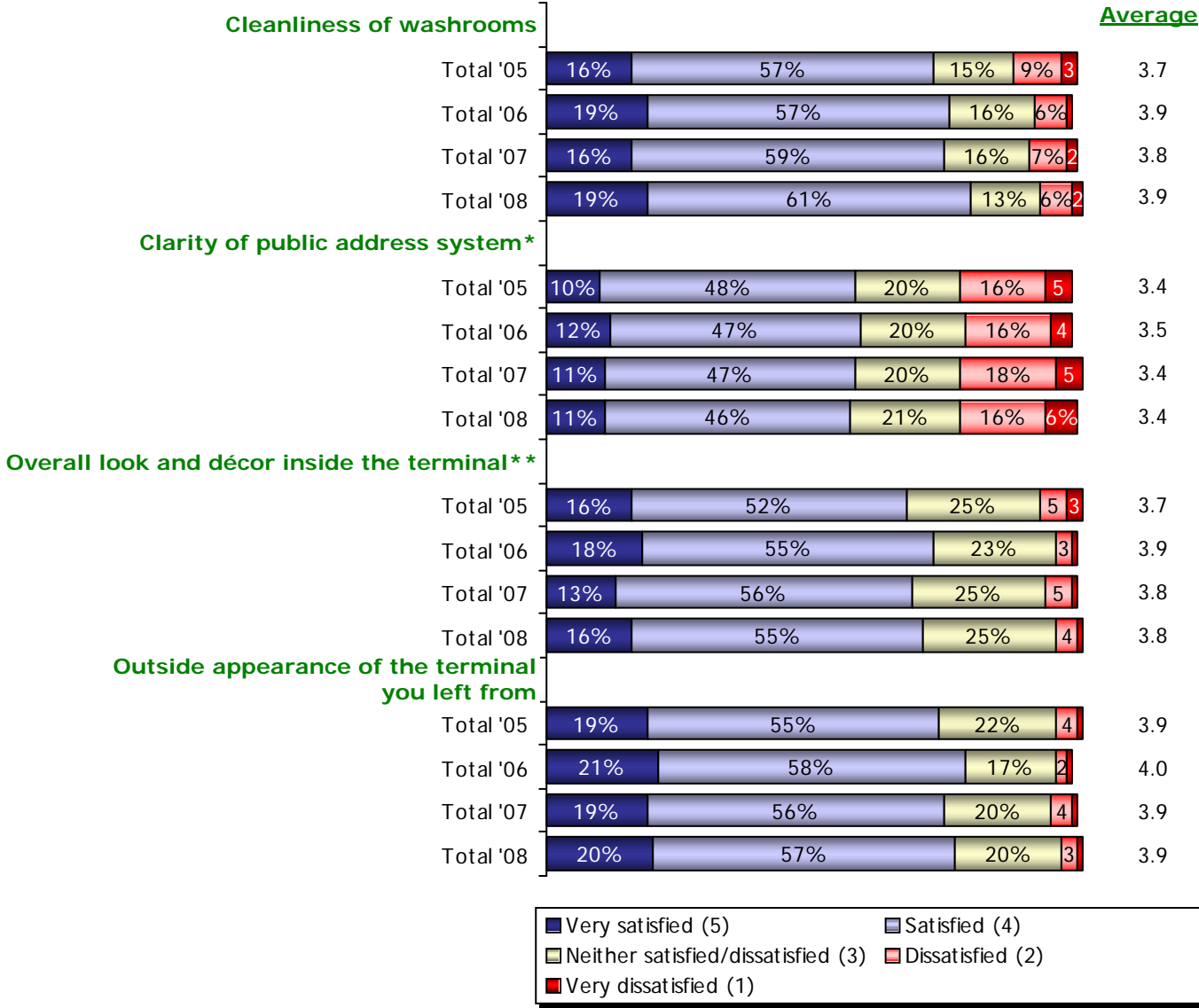
Other Terminal Services

Satisfaction levels with other terminal services are quite consistent with past measures.



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.

* Excluding Route 21 & 23.

** Excludes Route 19, 21 & 23.

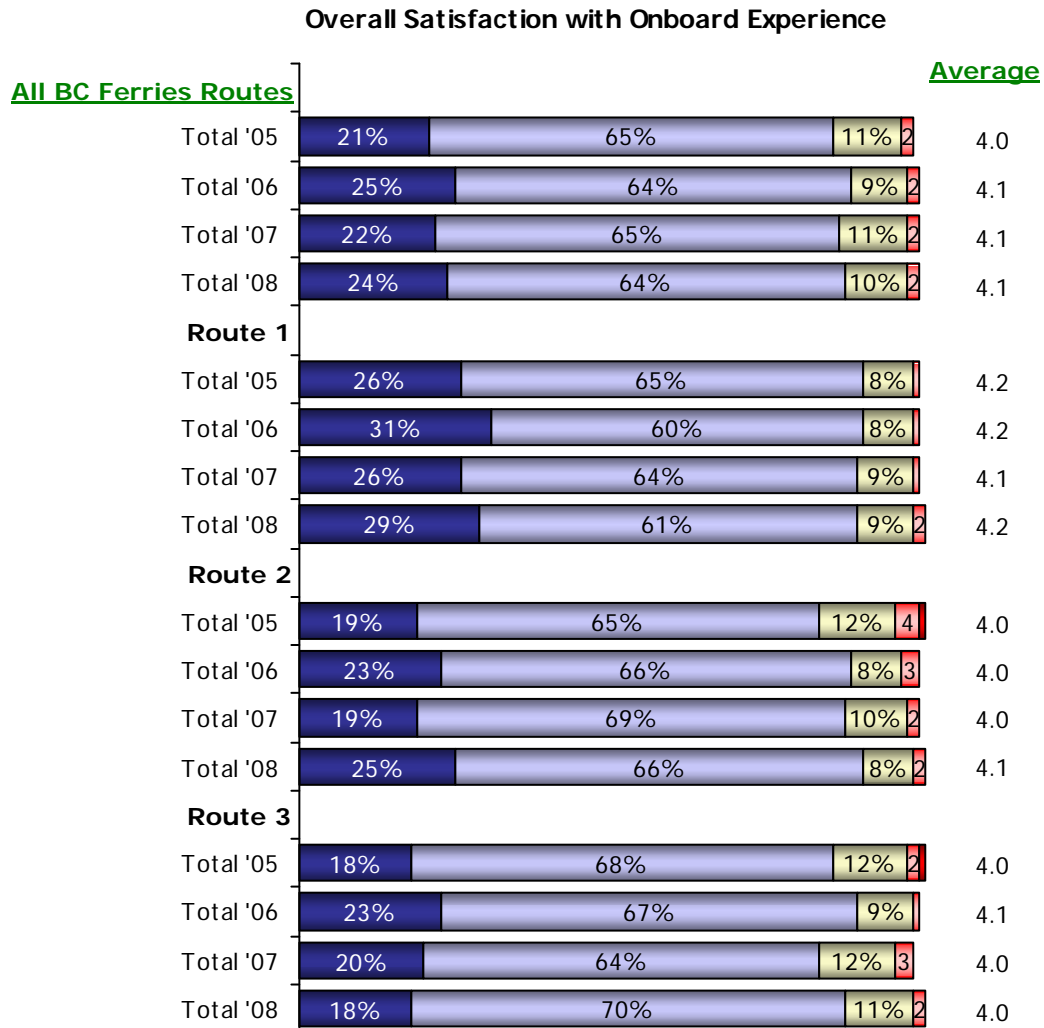
Onboard Experience

Overall Onboard Experience

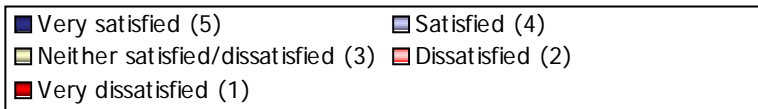
A total of 88% of passengers in 2008 were satisfied with their overall experience onboard, similar to the 2007 level (87%) for an overall rating of 4.1 on the 5-point scale. Ratings which declined slightly in 2007 on Routes 1, 2, 3 and 19 have rebounded on all routes except Route 19 on which ratings have fallen further (3.7 in comparison to 3.9 in the past).

Further improvements are noted on Route 30 (4.2 average rating in comparison to 4.0 in 2007) with year to year ratings improving most significantly in November. The introduction of the Coastal Inspiration to this route has likely contributed to this increase.

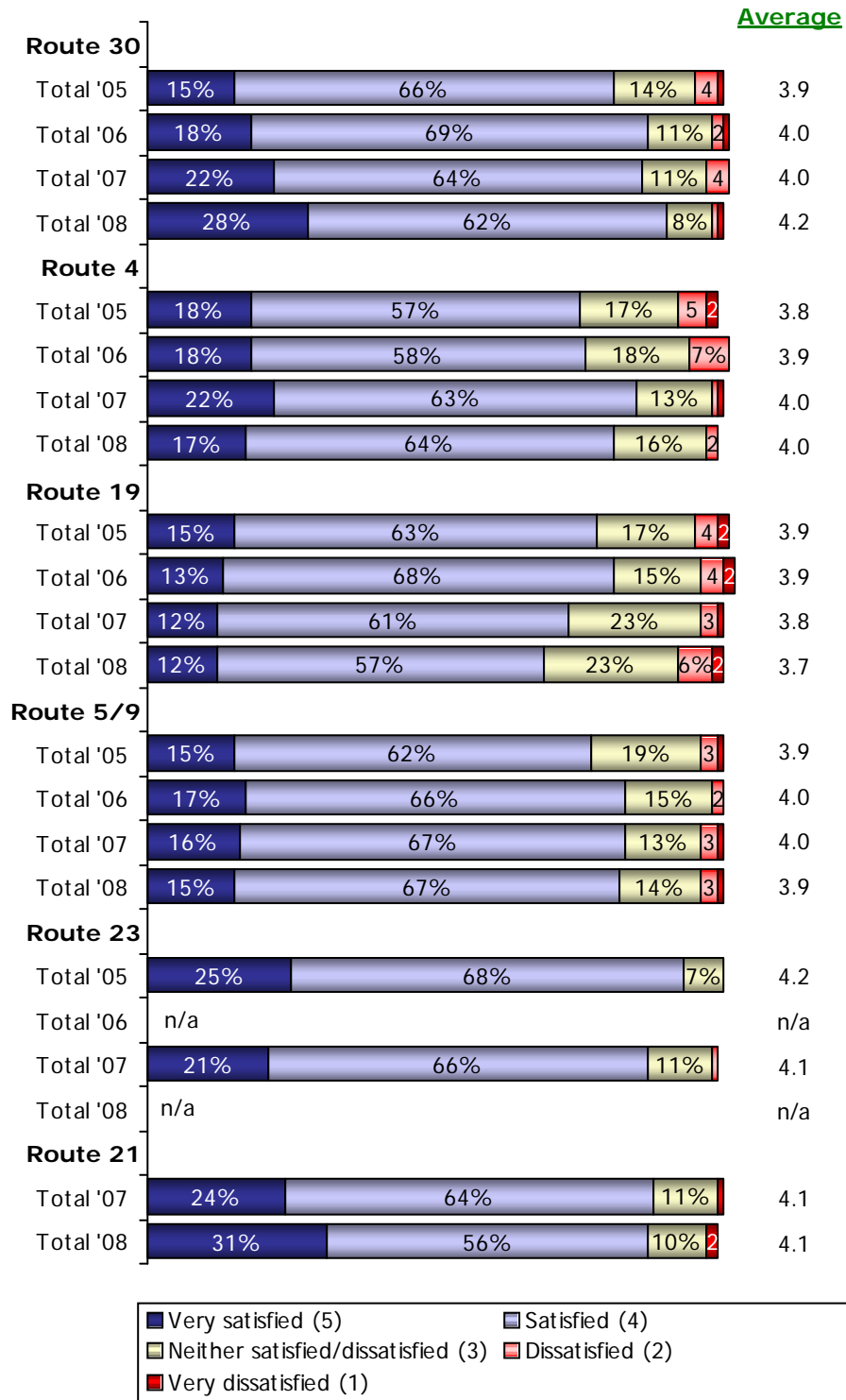
[NOTE: Refer to page 5 or page 33 for Route number codes]



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



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



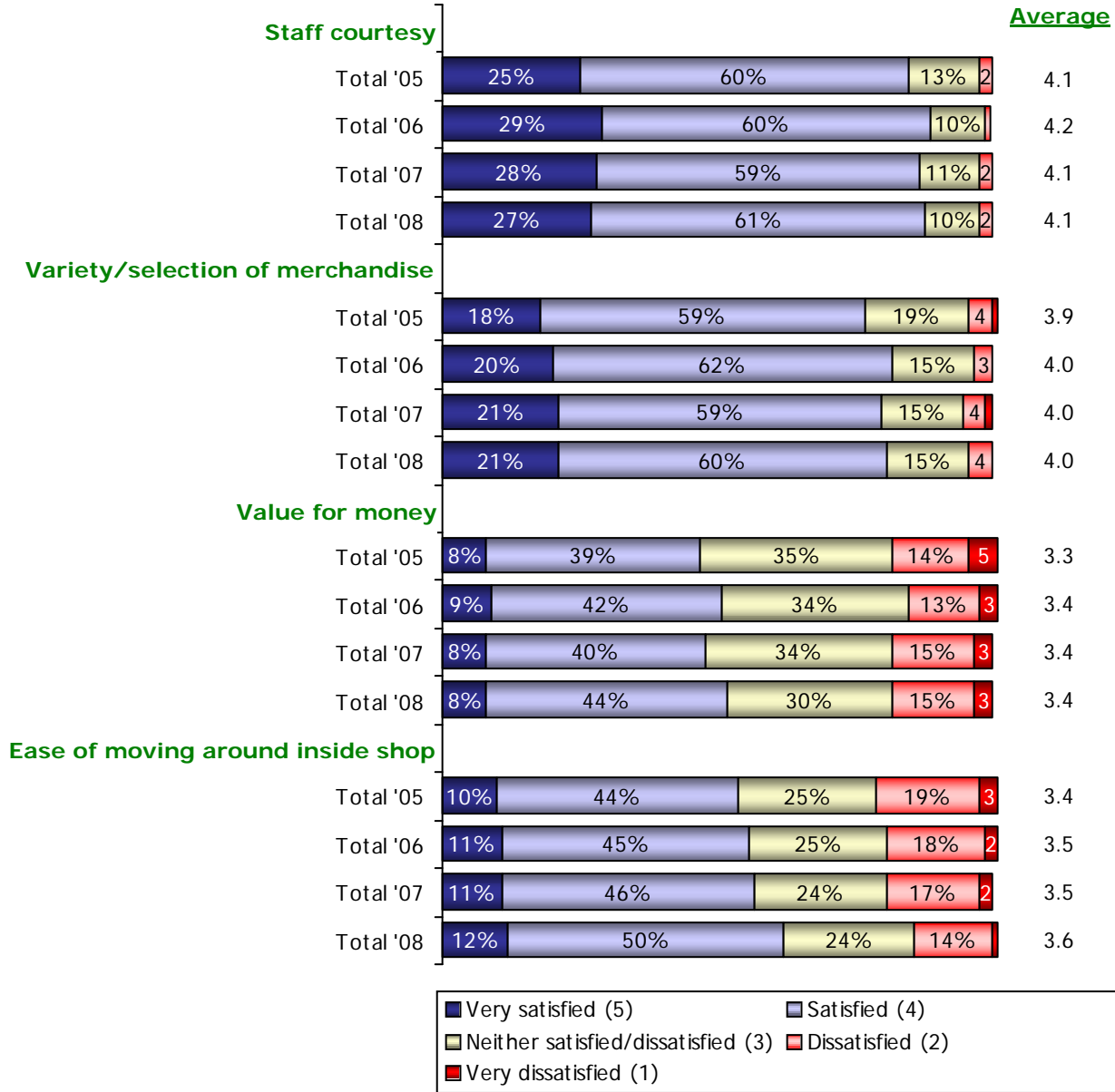
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Note: Route 23 not surveyed in 2006 or 2008.

Onboard Gift Shop/News Stand

Satisfaction levels with all aspects of the onboard gift shop/news stand have been stable over the past year with the exception that ratings have strengthened slightly for 'ease of moving around' with the new vessels posting slightly higher scores (3.7-3.8) than other vessels.

Satisfaction with Aspects of Gift Shop/News Stand Onboard*



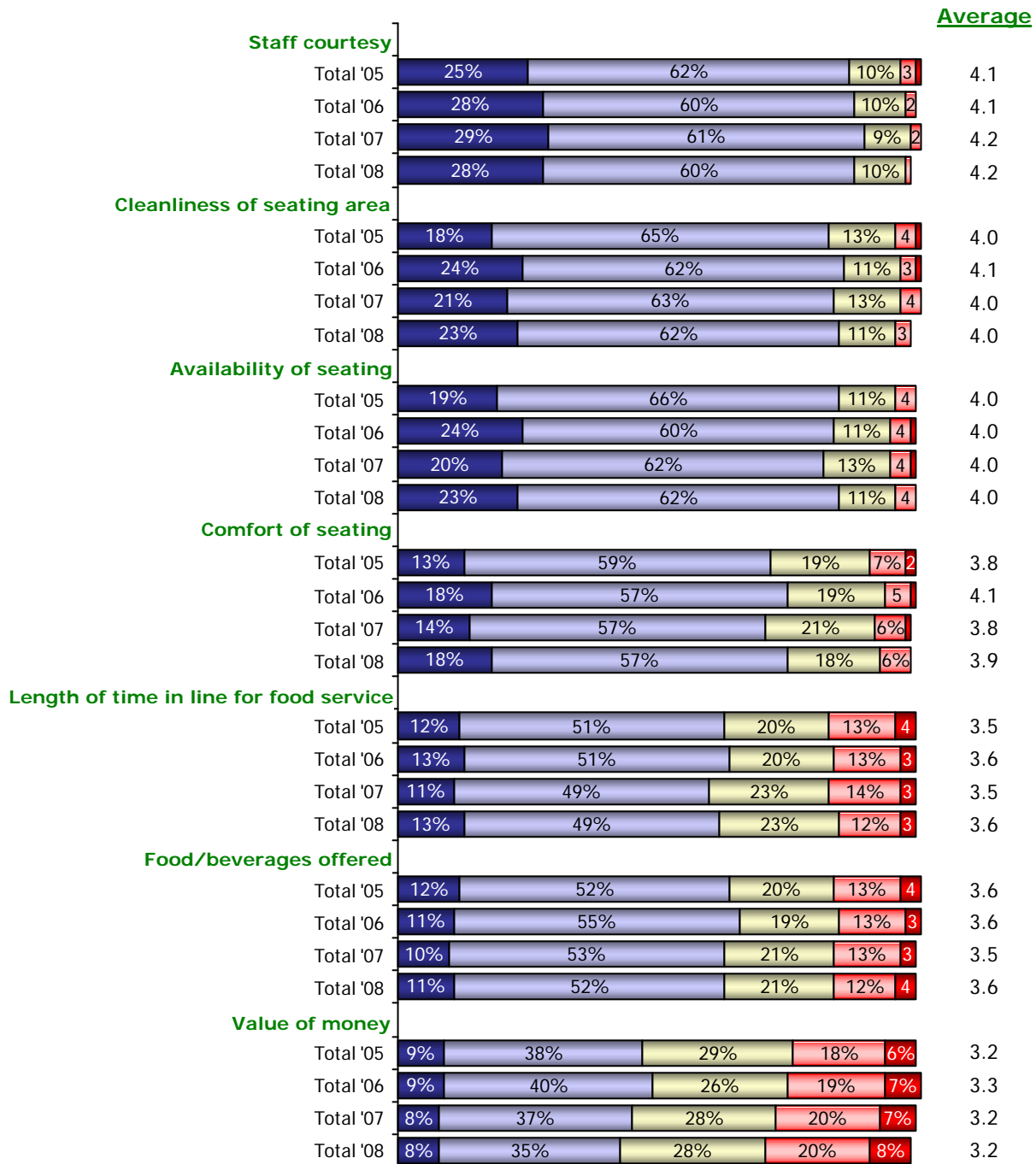
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

* Excludes Routes 4, 19, 21 and 23. Otherwise usage is 56%.

Onboard Food Services

Satisfaction levels with all aspects of onboard food services are relatively unchanged from a year ago.

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, 21 and 23.
Usage 73%

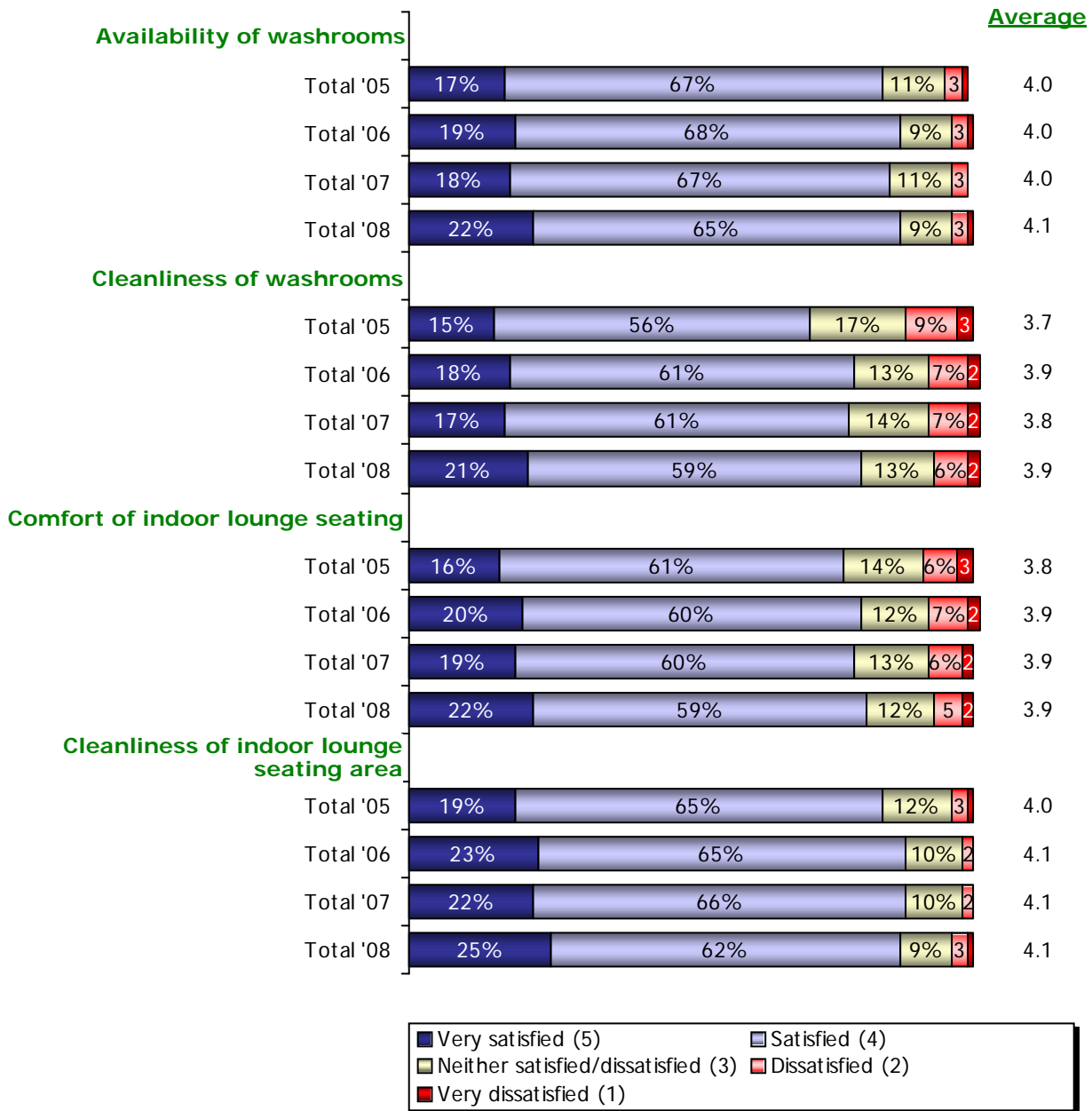


Onboard Washrooms and Onboard Seating

Satisfaction levels with aspects of the washrooms have been relatively stable.

Ratings for *comfort* and *cleanliness* of indoor lounge seating are also unchanged from a year ago.

Satisfaction with Onboard Washrooms and Onboard Seating

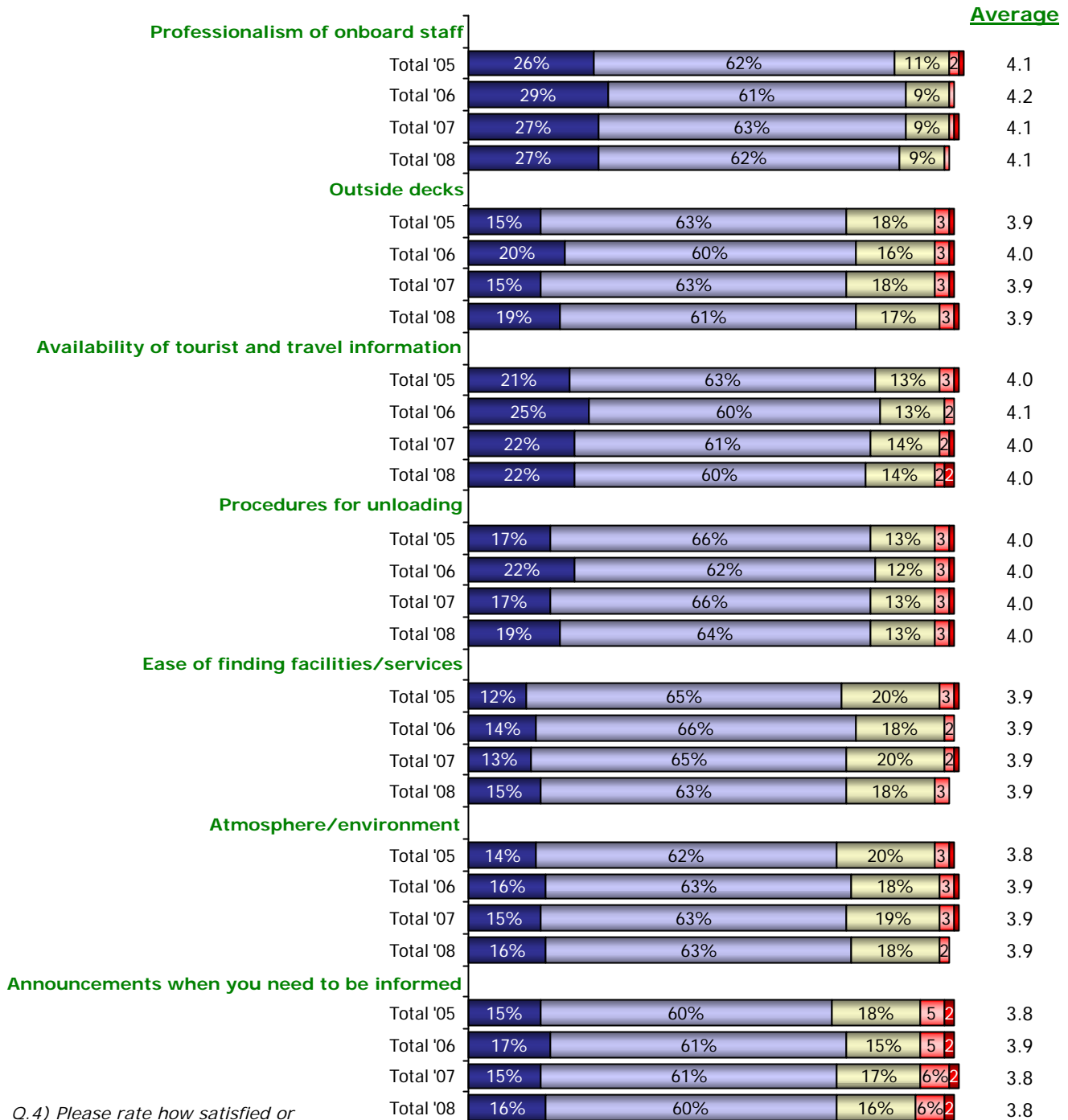


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

Other Onboard Facilities/Services

Satisfaction ratings are also quite consistent with 2007 measures for all other onboard facilities and services (see following page also).

Satisfaction with Other Facilities/Services Onboard

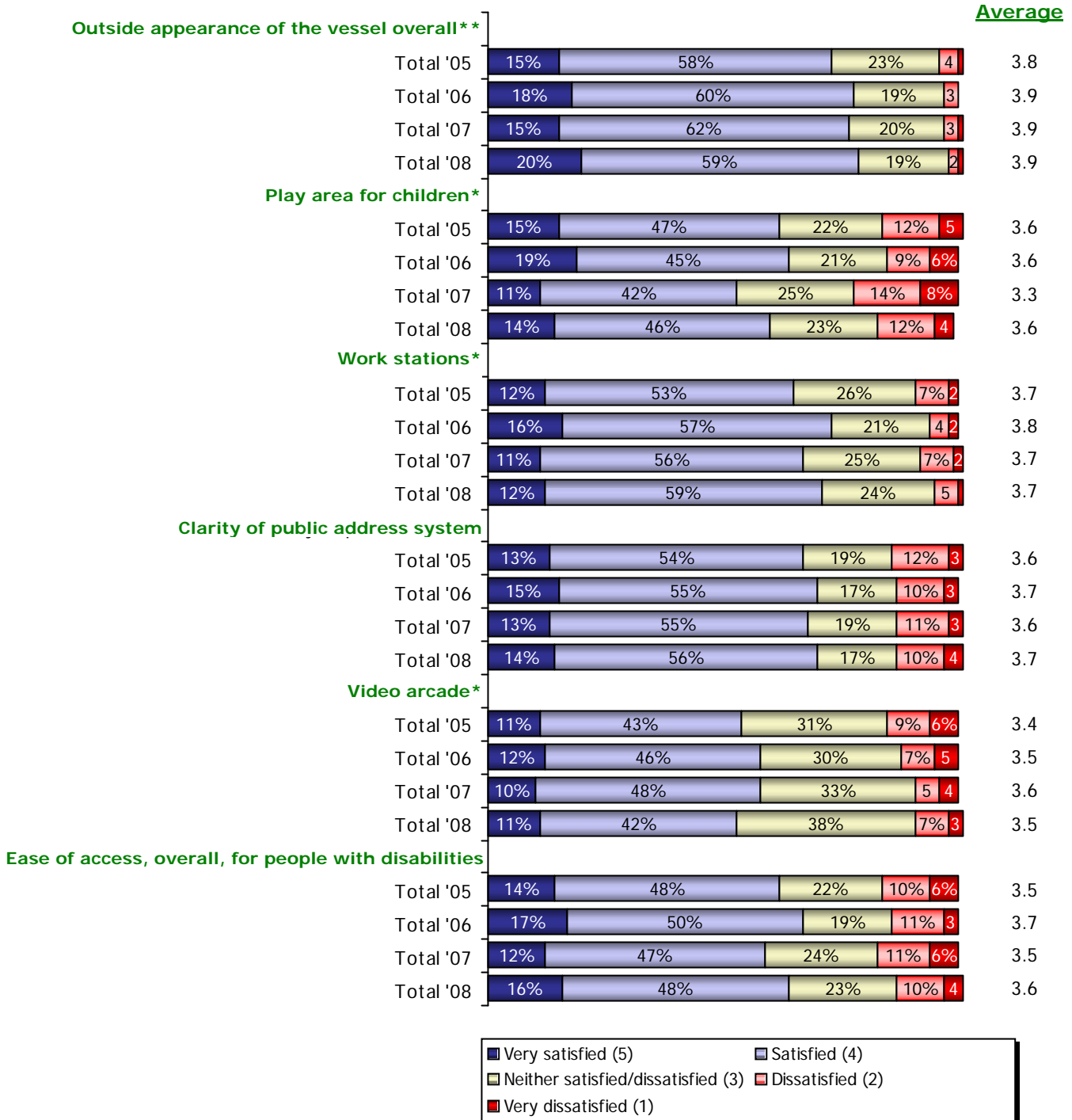


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.



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.

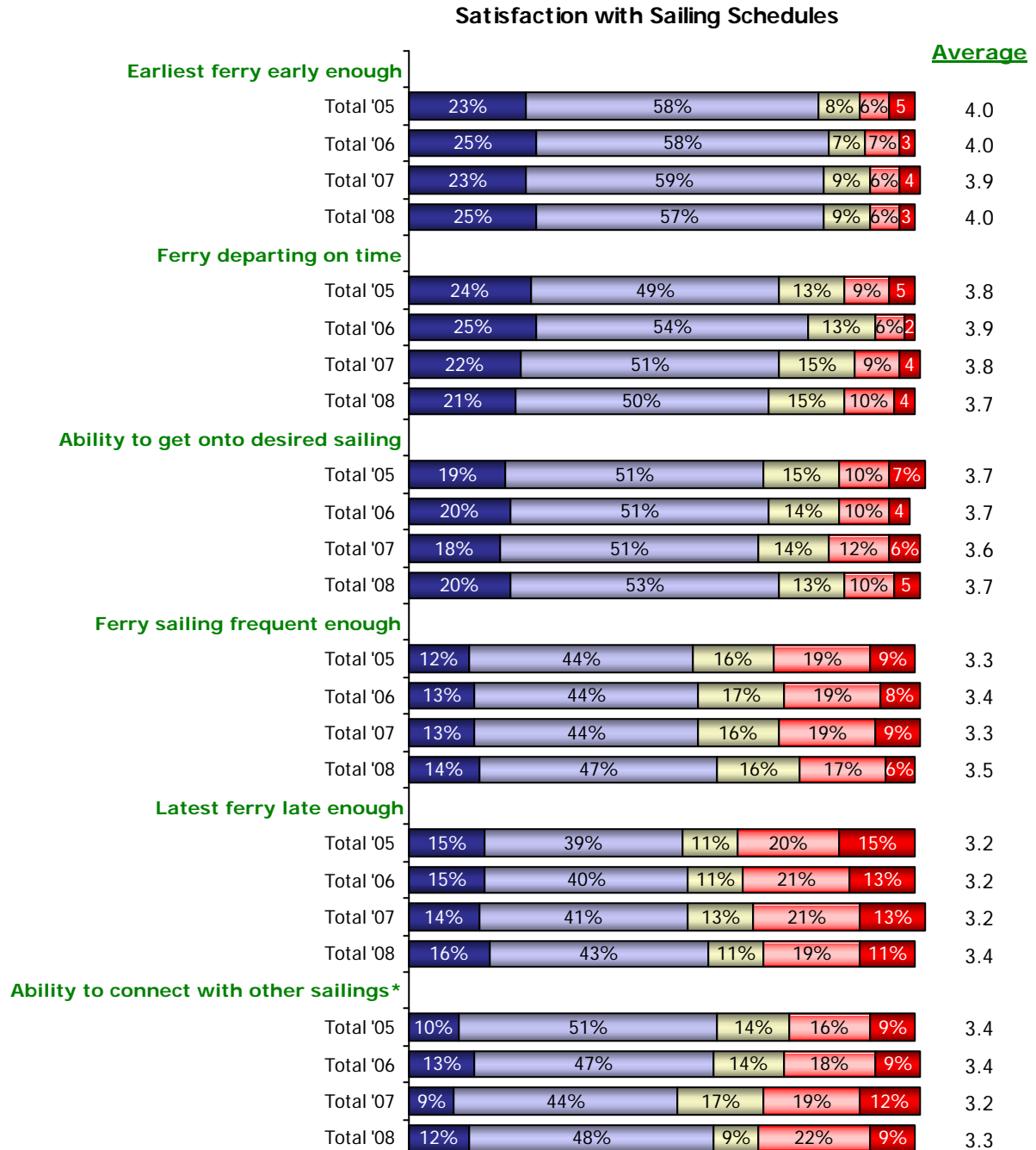
* Excludes routes 4, 19, 21 and 23.

** Question not asked in 2003

Sailing Schedules

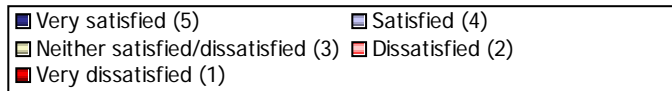
Various Aspects of Sailing Schedules

Ratings have been relatively consistent with respect to sailing schedule attributes, although there were challenges in August with *on-time departures*.



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

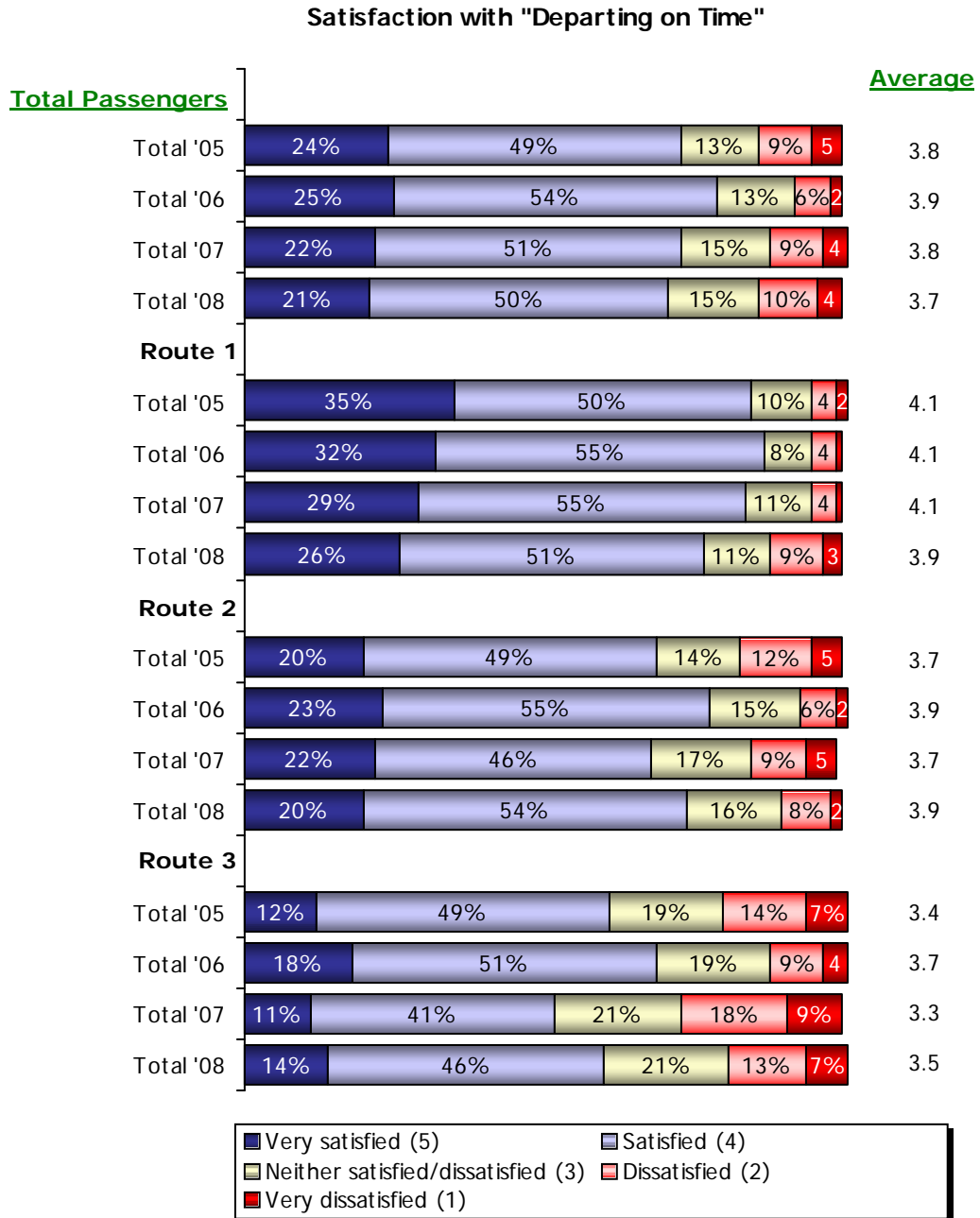
* Based on those connecting (n=361).



Departing on Time

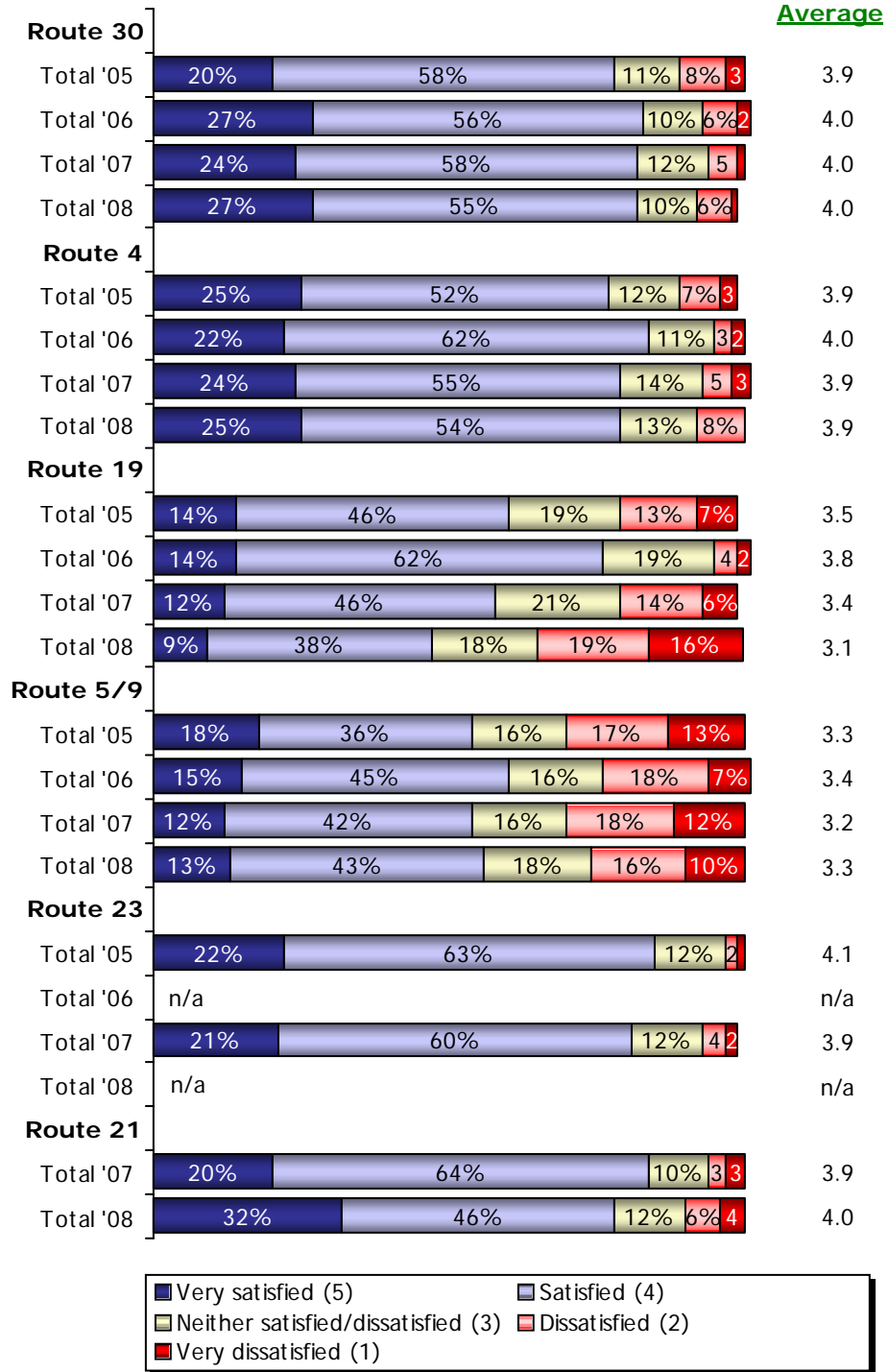
The following graph details the ratings for “departing on time” by route. In comparison to 2007, ratings are slightly lower on Routes 1 (August specifically), and 19, and have rebounded on Routes 2 and 3 after weaker performances in 2007.

[NOTE: Refer to page 5 or page 33 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)



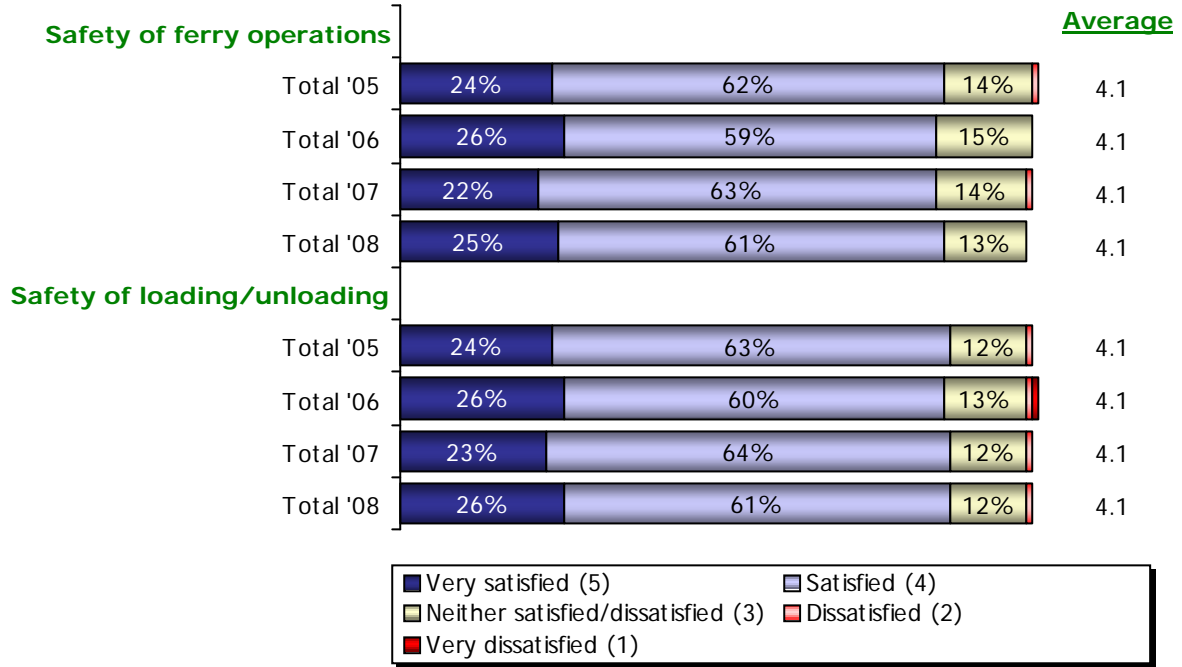
Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

Note: Route 23 not surveyed in 2006 or 2008

Safety

Perceptions of safety continue to be relatively strong.

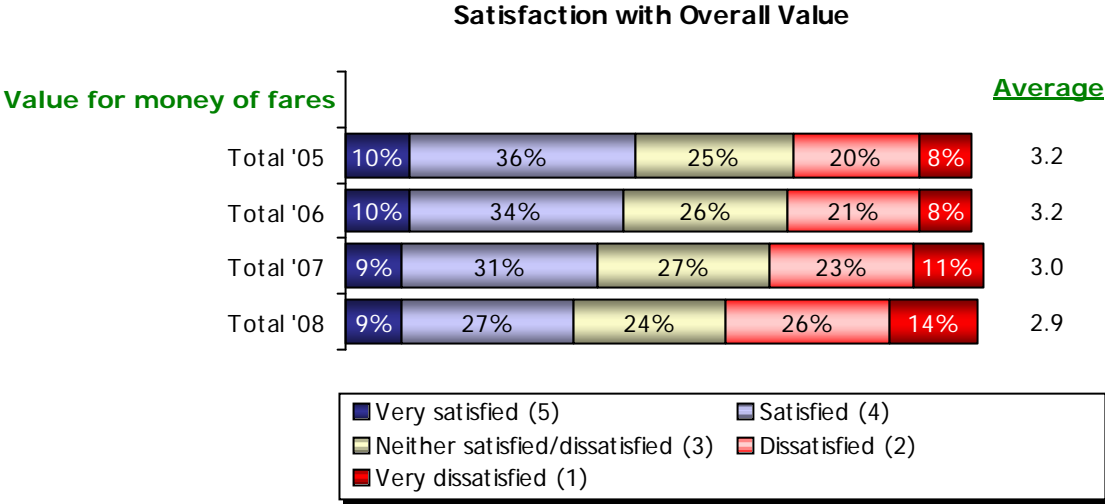
Satisfaction with Aspects of Safety



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

Overall Value

Satisfaction levels continue to decline with respect to *value for money of fares*, with the 2008 average rating falling to 2.9 from 3.0 in 2007 and from 3.2 in 2006.



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 - 2008	
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 2008 (See page 33 for Route Number Codes)											
	Total	Larger Routes				Route	Smaller Routes				
		Total	1	2	30	3	Total	4	19	21	5/9
OVERALL EXPERIENCE											
Trip overall	4.1	4.2	4.2	4.2	4.2	4.1	3.9	4.1	3.6	4.0	4.0
BEFORE ARRIVING AT TERMINAL											
Usefulness of BC Ferries website	4.3	4.3	4.3	4.3	4.3	4.3	4.2	4.3	4.1	4.2	4.2
Ease of using on-line reservations	4.1	4.1	4.1	4.1	4.2	4.1	4.1	4.1	3.8	3.8	4.2
Usefulness of BC Ferries phone service	3.6	3.6	3.7	3.5	3.6	3.6	3.7	3.6	3.2	3.6	3.8
Ease of using automated phone service	3.4	3.4	3.5	3.3	3.3	3.4	3.3	3.2	3.0	3.2	3.4
Highway signage	3.9	4.0	4.1	3.8	4.1	3.6	3.9	4.1	3.7	3.9	4.0
TERMINAL EXPERIENCE											
Terminal overall	4.0	4.1	4.1	3.8	4.2	3.9	3.9	4.0	3.5	4.1	4.0
Outside appearance of the terminal	3.9	4.0	4.1	3.7	4.1	3.8	3.8	4.0	3.3	4.1	3.9
Ticket Purchase											
Efficiency of the transaction	4.4	4.4	4.5	4.4	4.5	4.3	4.3	4.3	4.1	4.2	4.3
Staff courtesy	4.4	4.4	4.4	4.4	4.5	4.3	4.4	4.3	4.4	4.4	4.4
Clarity of staff directions	4.3	4.3	4.4	4.3	4.4	4.2	4.3	4.2	4.3	4.3	4.3
Food & Beverage Services at the Terminal											
Food beverages offered	3.5	3.6	3.6	3.5	3.6	3.3	3.3	3.4	-	-	3.3
Value for money	3.0	3.1	3.2	3.0	3.1	2.8	2.9	3.1	-	-	2.8
Gift Shop/ News Stand at the Terminal											
Variety/ selection of merchandise	3.8	3.8	3.7	3.8	3.9	3.9	3.6	3.5	-	-	3.6
Value for money	3.4	3.4	3.4	3.4	3.4	3.4	3.3	3.2	-	-	3.3
Outdoor Market Area at the Terminal											
Variety/ selection of merchandise	3.5	3.6	3.7	3.4	3.6	3.4	3.5	3.6	-	-	3.5
Value for money	3.4	3.4	3.5	3.2	3.3	3.3	3.3	3.2	-	-	3.3
Other Terminal Services											
Clarity of Public address system	3.4	3.5	3.5	3.5	3.6	3.1	3.2	3.6	3.0	-	3.2
Announcements when you need to be informed	3.7	3.8	3.8	3.7	3.8	3.4	3.5	3.7	3.1	3.9	3.5
Overall look & décor inside terminal	3.8	3.9	3.9	3.7	4.0	3.6	3.8	3.8	-	-	3.7
Availability of washrooms	4.0	4.1	4.1	4.0	4.1	3.9	3.9	4.0	3.6	4.2	3.9
Cleanliness of washrooms	3.9	3.9	3.9	3.9	4.1	3.9	3.8	3.8	3.2	4.1	4.0
Procedures for loading	4.0	4.1	4.1	4.0	4.1	3.9	3.9	4.0	3.8	4.1	3.9
Professionalism of terminal staff	4.1	4.1	4.2	4.1	4.2	4.0	4.1	4.1	4.1	4.3	4.1

Average Satisfaction Ratings by Route – All Waves 2008 (See page 33 for Route Number Codes)											
	Total	Larger Routes			Route	Smaller Routes					
		Total	1	2	30	3	Total	4	19	21	5/9
Foot Passenger Services at the Terminal											
Usefulness of TV info screens	3.6	3.6	3.6	3.6	3.8	3.3	3.6	3.6	-	-	-
Availability of parking spaces	3.7	3.8	4.0	3.5	4.1	3.8	3.2	3.7	2.2	-	3.6
Parking value for money	3.1	2.9	2.9	3.0	2.9	3.6	2.9	2.8	3.1	-	2.8
Ease of using passenger drop-off/ pick-up area	3.7	3.7	3.8	3.4	4.0	4.0	3.6	3.7	3.1	3.9	3.8
Availability of seating in pre-boarding lounge at terminal	3.7	3.6	3.5	3.7	3.9	3.7	3.8	3.9	3.2	4.1	3.9
Comfort of seating in pre-boarding lounge at terminal	3.6	3.6	3.6	3.6	3.7	3.6	3.5	3.8	2.7	3.6	3.7
Cleanliness of pre-boarding lounge	3.9	3.9	4.0	3.7	4.1	3.8	3.8	4.1	3.3	3.8	4.0
ONBOARD EXPERIENCE											
Onboard overall	4.1	4.2	4.2	4.1	4.2	4.0	3.9	4.0	3.7	4.1	3.9
Gift Shop/ News Stand											
Variety/ selection of merchandise	4.0	4.0	3.9	4.1	4.1	4.0	3.7	-	-	-	3.7
Staff courtesy	4.1	4.1	4.1	4.1	4.2	4.1	4.1	-	-	-	4.1
Ease of moving around inside shop	3.6	3.6	3.6	3.6	3.7	3.6	3.5	-	-	-	3.5
Value for money	3.4	3.4	3.4	3.4	3.3	3.4	3.4	-	-	-	3.4
Food Services											
Length of time in line for food services	3.6	3.6	3.6	3.5	3.7	3.5	3.7	-	-	-	3.7
Food/ beverages offered	3.6	3.6	3.6	3.6	3.6	3.5	3.2	-	-	-	3.2
Staff courtesy	4.2	4.2	4.1	4.1	4.2	4.2	4.1	-	-	-	4.1
Availability of seating	4.0	4.0	4.0	4.0	4.1	4.1	3.9	-	-	-	3.9
Comfort of seating	3.9	3.9	3.8	3.9	4.0	3.9	3.6	-	-	-	3.6
Cleanliness of seating area	4.0	4.0	4.0	4.1	4.2	4.1	3.9	-	-	-	3.9
Value for money	3.2	3.2	3.2	3.2	3.2	3.1	3.0	-	-	-	3.0
Washrooms											
Availability of washrooms	4.1	4.1	4.1	4.1	4.1	4.1	3.9	4.0	3.5	4.1	4.0
Cleanliness of washrooms	3.9	3.9	3.9	3.9	4.0	4.0	3.7	3.7	3.1	4.1	3.9
Lounge Seating											
Comfort of indoor lounge seating	3.9	4.1	4.1	4.1	4.1	4.0	3.4	3.1	2.8	3.6	3.7
Cleanliness of indoor lounge seating area	4.1	4.2	4.1	4.2	4.2	4.1	3.8	3.8	3.3	4.0	4.0

Average Satisfaction Ratings by Route – All Waves 2008 (See page 33 for Route Number Codes)											
	Total	Larger Routes			Route	Smaller Routes					
		Total	1	2	30	3	Total	4	19	21	5/9
Other Onboard Facilities/ Services											
Play area for children	3.6	3.7	3.8	3.5	3.5	3.3	3.2	-	-	-	3.2
Video arcade	3.5	3.6	3.6	3.4	3.6	3.4	3.0	-	-	-	3.0
Work stations	3.7	3.7	3.7	3.8	3.8	3.9	3.6	-	-	-	3.6
Outside decks	3.9	4.0	4.0	4.0	4.0	3.9	3.8	3.8	3.4	4.0	3.9
Outside appearance of the vessel overall	3.9	4.0	4.0	4.1	4.0	3.9	3.7	3.9	3.3	4.1	3.8
Availability of tourist and travel information	4.0	4.1	4.1	4.1	4.1	4.0	3.7	3.8	3.0	3.8	4.0
Ease of access, overall, for people with disabilities	3.6	3.8	3.7	3.7	3.9	3.6	3.2	3.6	2.4	3.6	3.5
Ease of finding facilities/ services	3.9	3.9	3.9	3.9	4.0	3.9	3.7	3.8	3.3	4.0	3.8
Clarity of public address system	3.7	3.7	3.7	3.7	3.8	3.7	3.4	3.6	2.9	3.5	3.5
Announcements when you need to be informed	3.8	3.8	3.8	3.8	4.0	3.8	3.7	3.8	3.2	3.7	3.8
Atmosphere/ environment	3.9	4.0	4.0	4.0	4.0	3.9	3.7	3.7	3.4	3.9	3.8
Procedures for unloading	4.0	4.0	4.1	3.9	4.1	3.8	3.9	4.0	3.8	4.1	3.8
Professionalism with onboard staff	4.1	4.2	4.2	4.2	4.2	4.1	4.1	4.1	4.0	4.3	4.1
Experience with the Sailing Schedule											
Earliest ferry earliest enough	4.0	4.0	3.9	4.0	4.1	4.0	3.9	4.0	4.0	4.1	3.8
Latest ferry late enough	3.4	3.5	3.5	3.4	3.7	3.0	3.4	2.9	3.5	3.8	3.4
Ferry sailing frequent enough	3.5	3.6	3.7	3.5	3.5	3.1	3.4	3.5	3.6	4.0	3.0
Ability to get onto desired ferry	3.7	3.8	3.9	3.7	3.9	3.5	3.7	3.9	3.2	3.8	3.8
Ability to connect with other sailings (based on those connecting)	3.3	3.2	3.6	2.8	3.1	3.3	3.4	3.5	2.7	3.6	3.6
Ferry departing on time	3.7	3.9	3.9	3.9	4.0	3.5	3.5	3.9	3.1	4.0	3.3
Safety											
Safety of ferry operations	4.1	4.1	4.1	4.1	4.1	4.0	4.1	4.1	3.9	4.3	4.1
Safety of loading/unloading	4.1	4.2	4.2	4.1	4.1	4.0	4.1	4.2	4.0	4.3	4.1
OVERALL VALUE											
Value for money of fares	2.9	3.0	3.0	2.9	3.2	2.9	2.7	2.8	2.5	2.4	2.8

**TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal
- All Waves 2008 -**

	Total	Terminals							
		Tsaw-wassen	Swartz Bay	Horseshoe Bay	Departure Bay	Langdale	Duke Point	Denman Island	Buckley Bay
OVERALL EXPERIENCE									
Trip overall	4.1	4.2	4.3	4.1	4.2	4.0	4.3	4.1	4.0
TERMINAL EXPERIENCE									
Terminal overall	4.0	4.1	4.2	3.8	3.9	3.8	4.1	4.2	4.1
Outside appearance of the terminal	3.9	4.1	4.1	3.8	3.7	3.7	4.1	4.1	4.0
Ticket Purchase									
Efficiency of the transaction	4.4	4.5	4.5	4.3	4.4	4.2	4.4	4.3	4.2
Staff courtesy	4.4	4.4	4.4	4.4	4.4	4.3	4.4	4.5	4.4
Clarity of staff directions	4.3	4.4	4.4	4.2	4.3	4.1	4.4	4.3	4.3
Food & Beverage Services at the Terminal									
Food beverages offered	3.5	3.7	3.6	3.3	3.5	3.3	3.4	-	-
Value for money	3.0	3.1	3.2	2.8	3.0	2.8	3.0	-	-
Gift Shop/ News Stand at the Terminal									
Variety/ selection of merchandise	3.8	3.9	3.6	3.8	3.8	4.0	3.9	-	-
Value for money	3.4	3.5	3.3	3.4	3.4	3.5	3.5	-	-
Outdoor Market Area at the Terminal									
Variety/ selection of merchandise	3.5	3.7	3.7	3.3	3.4	3.5	3.5	-	-
Value for money	3.4	3.4	3.5	3.2	3.1	3.4	3.4	-	-
Other Terminal Services									
Clarity of Public address system	3.4	3.5	3.5	3.3	3.5	3.1	3.7	-	-
Announcements when you need to be informed	3.7	3.8	3.7	3.6	3.7	3.4	3.9	4.0	3.7
Overall look & décor inside terminal	3.8	3.9	3.9	3.7	3.7	3.5	4.1	-	-
Availability of washrooms	4.0	4.0	4.1	4.0	4.0	3.9	4.1	4.2	4.2
Cleanliness of washrooms	3.9	3.9	4.0	3.9	3.9	3.9	4.1	4.1	4.0
Procedures for loading	4.0	4.1	4.1	4.0	4.0	3.9	4.2	4.2	4.0
Professionalism of terminal staff	4.1	4.1	4.2	4.1	4.1	3.9	4.2	4.3	4.3
Foot Passenger Services at the Terminal									
Usefulness of TV info screens	3.6	3.6	3.7	3.4	3.7	3.3	3.9	-	-
Availability of parking spaces	3.7	3.9	4.0	3.7	3.3	3.9	4.2	-	-
Parking value for money	3.1	3.0	2.8	3.2	2.9	3.7	3.1	-	-
Ease of using passenger drop-off/ pick-up area	3.7	3.7	3.8	3.7	3.5	4.0	4.1	3.7	4.1
Availability of seating in pre-boarding lounge at terminal	3.7	3.5	3.7	3.7	3.7	3.7	4.1	4.3	4.1
Comfort of seating in pre-boarding lounge at terminal	3.6	3.5	3.7	3.6	3.5	3.8	3.8	3.9	3.4
Cleanliness of pre-boarding lounge	3.9	3.9	4.1	3.8	3.6	3.8	4.2	4.2	3.5
OVERALL VALUE									
Value for money of fares	2.9	3.0	3.0	2.9	3.0	3.0	3.1	2.7	2.2

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 2008 are as follows:

	All Waves 2008	
	<u>Screeners</u>	<u>Returns</u>
Route 1: Tsawwassen-Swartz Bay	1,972	783
Route 2: Horseshoe Bay-Departure Bay	1,888	594
Route 3: Horseshoe Bay-Langdale	1,034	455
Route 30: Tsawwassen-Duke Point	1,890	724
Route 4: Swartz Bay-Fulford Harbour, Saltspring Island	1,220	499
Route 19: Departure Bay–Descanso Bay, Gabriola Island	1,485	390
Rout 21: Denman-Buckley Bay	580	223
Route 5/9: Southern Gulf Islands	3,476	1,484
Route 23: Campbell River-Quadra Island	n/a	n/a
TOTAL	13,545	5,152

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 2008 –				
	Screeners		Returns	
	<u>Actual</u> (13,545) %	<u>Weighted</u> (13,545) %	<u>Actual</u> (5,152) %	<u>Weighted</u> (5,096) %
Weekend				
Route:				
1	5	13	5	14
2	4	7	4	6
3	2	5	2	5
30	4	3	4	4
4	3	1	3	2
19	3	1	2	1
21	1	1	1	1
5/9	6	2	7	2
23	n/a	n/a	n/a	n/a
Weekday				
Route:				
1	10	23	10	23
2	10	15	8	13
3	6	11	7	13
30	10	7	10	6
4	6	3	7	3
19	8	4	6	3
21	3	1	3	1
5/9	19	4	22	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 2008 study were completed during three different time periods: June, August and November.

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 2007.

Response Rates	
	<u>All Waves 2008</u>
Route 1	40
Route 2	31
Route 3	44
Route 30	38
Route 4	41
Route 19	26
Route 21	38
Route 5/9	43
Route 23	n/a
Overall response	38%

Margin of Error

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 2008		
	<u>Actual Sample Size</u>	<u>Approximate Tolerance Limits % Points</u>
Total Screeners	13,545	+/- .8%
Total Returns	5,152	+/- 1.4%
Individual Route Returns		
Route 1	783	+/- 3.5%
Route 2	594	+/- 4.0%
Route 3	724	+/- 3.6%
Route 30	455	+/- 4.6%
Route 4	499	+/- 4.4%
Route 19	390	+/- 5.0%
Route 21	223	+/- 6.7%
Route 5/9	1,484	+/- 2.5%
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.