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LINER SHIPPING ROUTE STUDY

FINAL REPORT

VOLUME IV

NORTHERN ISLANDS SHIPPING SERVICES

EVALUATION REPORT

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FOREWORD

The Liner Shipping Route Study (LSRS) and the MARINA and SHIPPERCON STUDY (MARSH Study) were conducted, during 1993-1994, under the Philippine Sea Transport Consultancy (PSTC). The Final Report of the LSRS comprises 14 volumes and the Final Report of the MARSH Study comprises 5 volumes.

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Annex A

Results of Northern Islands Cargo Services Surveys

Annex B

Northern Island Passenger Survey Results

PORT OF BATANGAS



*Cargo trucks and jeepneys lined up to board the
Ro-Ro vessel*



*Cargo jeep loaded with vegetables and fruits
arriving at Batangas*

- d

1. INTRODUCTION & SUMMARY OF FINDINGS

Introduction

The terms of reference (TOR) for the Liner Shipping Route Study (LSRS) specify, as one objective of the study, that the LSRS shall "survey and review the adequacy of existing liner shipping services, including ferry services, in the Philippines, and ... identify priorities for new franchises and franchise amendments to provide expanded services, new types of services, and better standards of service". The workscope section of the TOR states that, "The LSRS must identify, from shipping operators reports on operations, from SHIPPERCON records, and from extensive field interviews with users of cargo and passenger liner services, the standards of services being performed on each liner shipping route, including especially the availability of appropriate services, convenience of schedule, service reliability, passenger care and comfort standards, and safety considerations...". The TOR go on to state that, "current low service standards, as well as high load factors, annually or seasonally, are to be criteria by which the LSRS will identify needs for increasing service frequency, including just seasonal frequency increases, and for approving new route franchises".

The TOR also identify the limits of LSRS responsibility regarding shipping service evaluation stating that, "It is not expected that the LSRS will recommend precise adjustments to service schedules, but merely will indicate where, and the approximate extent to which, service schedule flexibility should be incorporated in existing and new route franchises, and to indicate, approximately, the new route franchises that should be approved during the cargo rate deregulation period, i.e., 1993-1996", and further that, "It will subsequently be the responsibility of MARINA to invite applications for new or expanded services, and then to evaluate applications received...".

To carry out the shipping service evaluation portion of the LSRS workscope, the LSRS divided the areas to be surveyed into six groups:

- **Northern Islands.** The areas surveyed include the islands of Mindoro, Marinduque, Romblon, Tablas, Sibuyan, Masbate, and Catanduanes, and survey ports include the principal ports of these islands, as well as the Luzon ports of Manila, Batangas, Lucena (Dalahican), Tabaco, and Legaspi.
- **Eastern Visayas.** This survey area is Region VIII of the Philippines, and ports where LSRS surveys were conducted included Tacloban and Catbalogan.

- **Central & Western Visayas.** This area corresponds to Regions VI and VII. LSRS survey ports included Cebu, Iloilo, San Jose De Buenavista, Dumaguít, New Washington, Culasi, Bacolod, Dumaguete, San Carlos, Tagbilaran, and the ports of Guimaras Island.
- **Northern Mindanao.** This area approximately corresponds to Region X and the northern provinces of Region XII, and includes the survey ports of Cagayan de Oro, Surigao, Nasipit, Iligan, and Ozamis.
- **Southern Mindanao.** This area approximately corresponds to Region XI, the southern provinces of Region XII, and the mainland provinces of the Autonomous Region of Muslim Mindanao (ARMM), and includes the survey ports of Davao, General Santos, and Cotabato/Polloc.
- **Zamboangá & Sulu Archipelago.** This area includes the ARMM offshore provinces of Sulu and Tawi Tawi, Basilan Island, and most of the Zamboanga Peninsula, and ports where LSRS surveys were conducted include Zamboanga, Pagadian and Jolo.

The LSRS prepared a draft shipping service evaluation report on each of the six areas identified above. In this Final Report, however, the Northern Mindanao and Southern Mindanao reports have been combined in Volume VII. The other service evaluation reports are Volumes IV through VI, and Volume VIII.

The shipping services of Palawan Province are discussed in the Final Report's Volume IX, wherein the LSRS focus is mainly on the needs for additional services, rather than on the improvement of existing services.

The port of Manila North Harbor (MNH) is discussed to some extent in most volumes of the Final Report, because of the importance of shipping connections to the MNH for all other areas of the Philippines. The principal discussion of the MNH is included in Volume XII, however, which focuses on the potential role of Batangas Port as a terminus for interisland liner shipping services.

Northern Luzon and the Bicol Peninsula have very limited interisland liner shipping services, in 1994. The LSRS did not conduct any developmental route evaluations for these two large areas of Luzon, but both areas are discussed in Volume III of this Final Report, which provides profiles of the sea trade of various areas and islands of the Philippines.

Each of the five service evaluation reports examines the adequacy of both cargo and passenger liner shipping and ferry services, identifying routes that are franchised and the extent to

which they are being operated; operators and vessels, with vessel rated or estimated capacities; route capacities for passenger traffic and capacity utilization, including seasonality; shipping service standards and problems; underlying, contributory causes for any identified low service standards and problems; and desirable actions to be taken to better ensure that shipping service standards are satisfactory in the future.

After this brief introduction, each of the shipping service evaluation reports presents its findings and recommendations as the remainder of Chapter 1, and is comprised of five other chapters and two or three annexes. Chapters 2 through 6 of each report present, respectively, available information on services franchised and operated, an evaluation of cargo services, an evaluation of passenger services, the identification of factors affecting service adequacy, and a recommended approach to improving the adequacy of services. Annexes A and B, in each of the five reports, provide detailed cargo and passenger survey information, respectively. Only Volume VIII, discussing the shipping services of the Zamboanga Peninsula, Basilan Island, and Sulu Archipelago (ZAMBASULA) area, includes a third annex which examines the economy and trade of the area.

Fieldwork for the Northern Islands Shipping Services Evaluation Report (Northern Islands Report), which is Volume IV of this Final Report, was carried out in both provinces of Mindoro, on the islands of Romblon, Tablas and Marinduque, and at the Luzon ports of Batangas, Lucena, Legaspi and Tabaco, in May 1993, and on the islands of Catanduanes and Masbate, in June and July 1993, respectively. Most of the operators serving the northern islands have not been submitting complete annual reports to MARINA on their operations, so the LSRS fieldwork was necessary even to identify what services were actually being operated.

Summary of Findings

The findings of this LSRS Northern Islands Report are summarized below, by island or island group, and separately for cargo and passenger services.

Mindoro

- Cargo Services

There was essentially very little wrong with Mindoro interisland cargo services, in 1993, that a good road network would not cure, and improvement of the road connecting San Jose to Abra de Ilog is especially needed, for both passenger and cargo traffic. There were very few complaints by shippers, who were moving their

goods between Mindoro and Batangas by vehicles accommodated aboard RORO ferries. The exception was that a few small shippers who were utilizing cargo jeepneys indicated that, during peak shipment seasons (palay harvest/post-harvest periods), the large shippers who were utilizing cargo trucks monopolized large proportions of RORO vessel vehicle-carrying capacity, thereby delaying by a few hours some loaded jeepney movements. Some of the shippers indicated that the advent of RORO services on the Batangas-Calapan route, more than a decade earlier, had lured Luzon palay/rice traders to Mindoro, thereby increasing competition among buyers and improving the market prices for Mindoro producers.

Not all Mindoro shippers were enamored of RORO services, however. Those shippers who continued to prefer breakbulk shipment were finding that the rapid turnaround of RORO vessels did not permit much loading and unloading of breakbulk cargo per trip, and such cargo, therefore, sometimes needed to complete 1.5 or 2.5 round-trips before it was finally and fully unloaded from a RORO vessel that was keeping to schedule. The principal shipper interviewed by the LSRS with this complaint of inadequate cargo-handling time was the National Food Authority (NFA). The NFA preferred (the LSRS did not learn why) shipping palay and rice as breakbulk cargo, and estimated that it was possible to accommodate only 20 percent of its outward shipments from Mindoro on RORO vessels because of the short handling periods for breakbulk cargo. (Not all of the NFA palay/rice shipments were destined for Luzon, and small-consignment breakbulk shipments aboard bancas probably represented the least-coast option of transporting rice to nearby islands, including the islands of Tablas and Marinduque.)

There were three port inadequacies that were adversely affecting the accommodation of cargo (and to some extent also of passengers) between Batangas and Mindoro: (i) most important, was the delay in implementing a plan to expand the capacity of Batangas Port; (ii) the port of Calapan has poor landside access; and (iii) the RORO ramp at Abra de Ilog was in a state of disrepair.

Passenger Services

Three ferry routes and two liner shipping routes between Batangas and five Mindoro ports were surveyed by the LSRS, to ascertain the adequacy of passenger services. Results of these surveys showed that:

- ▶ The Batangas-Calapan route was being adequately served, although services of one of the four RORO vessels surveyed on the route needed to be upgraded, and less important improvements were needed in the other three cases as well. Most passengers interviewed were frequent travelers on the route, and accordingly should have been good judges of all aspects of service. On the three vessels rated highest, more than 80 percent of the survey

samples rated the respective operators highly with regard to concern for safety, adequacy of services to meet demand, and service reliability.

- ▶ Despite the poor condition of the San Jose-Mamburao-Abra de Ilog road, it was cheaper and quicker, in 1993, to travel by road from San Jose to Abra de Ilog and take the ferry to Batangas, than to sail directly from San Jose to Batangas. Abra de Ilog traffic grew by a remarkable 31.8 percent from 1991 to 1992, and even without improvement of the road, the port and its ferry connection to Batangas may have been serving most of the traffic between Occidental Mindoro and Luzon in 1993. With this traffic growth rate, it was not surprising that only 31 percent of the 108 passengers interviewed on the Batangas Abra de Ilog route felt that services were adequate to meet demand. Passengers on the largest of the three RORO vessels surveyed did not rate the operator highly in regard to adherence to service schedule, but in the case of this vessel the complaint was of early departure. An hour layover was scheduled, but the vessel was usually ready to head back to Batangas within 30 minutes of its Abra de Ilog arrival.
- ▶ The Batangas-Puerto Galera route was being adequately served, in 1993, with passengers aboard both vessels surveyed giving services high marks for adherence to schedule, concern for safety, boarding procedure, baggage accommodation, space reservation, and adequacy to meet demand.
- ▶ The liner service between San Jose and Batangas was satisfactory in most regards, in 1993, but a sizable proportion of passengers thought that a more frequent service would be desirable (this route was being served twice a week, and a direct connection to Manila was being provided once a week).
- ▶ Similarly, service on the Sablayan-Batangas route was not rated by passengers as being adequate to meet demand, but the service was considered satisfactory in many other important respects, including reliability, safety, space reservation, baggage accommodation, and vessel boarding procedure.
- ▶ A rather common complaint of passengers, but by no means a universal one, was that cleanliness was not being adequately maintained aboard the vessels.

Marinduque

Cargo Services

Although there were RORO services being provided between Marinduque and Lucena, in 1993, they had low vehicle-carrying capacity, which was limited not only by the size and designs of the vessels but also by the regular overflow of passengers into the areas designed for vehicle accommodation. Despite this capacity constraint, shippers of fishery products indicated to the LSRS that the 1987 advent of RORO services had ended their need to ship their cargoes by air. The shift to the sea mode had not only reduced their shipment costs but had also improved shipment frequency. Marinduque also produces fruits and some of these were being regularly shipped on ferries to Lucena. Handicrafts producers were continuing to ship by air, but their shipments amounted to only around 200 kgs./week. Lower value goods, such as copra outflows and rice inflows, were being accommodated mainly by motorized bancas.

Passenger Services

Passenger services were being provided by the same RORO ferries that provided most of Marinduque's cargo services. Passenger traffic levels were relatively high on a per-capita basis (approximately 0.9 round-trip/person/annum), with a 1992 daily two-way flow of approximately 900 persons at Marinduque's two principal ports of Sta. Cruz and Balanacan. Most of the passengers interviewed by the LSRS on a vessel serving the Balanacan-Dalahican (Lucena) route felt that services were adequate to meet demand, but only half of those sailing the Sta. Cruz-Dalahican route expressed that same view. On both routes passengers indicated that there was good adherence to schedule. Only on the Balanacan route, however, did large majorities of passengers express favorable views of the operator's concern for safety and the space reservation system.

Catanduanes

Cargo Services

Cargo services between Catanduanes and Luzon were not satisfactory in 1993. The following was true at that time:

- ▶ The majority of large-scale abaca traders were employing motorized bancas to accommodate their cargo, since the RORO ferry operating between Tabaco and Virac, according to the traders, was often encountering engine trouble, and for that reason was not reliable. The smaller traders of abaca were generally being permitted by the larger traders to utilize any available space not required by the latter on chartered vessels (abaca fiber

deteriorates in quality if stocked even for a week, so guaranteed outward shipment is essential to the survival of both producers and traders).

- ▶ The RORO vessel, in addition to its engine problems, had limited vehicle-carrying capacity, and shippers interviewed by the LSRS indicated that there was a need for an additional vessel on the route, one that would be larger in capacity and could accommodate heavy vehicles as well as light ones.
- ▶ Shippers of fisheries products had experienced ferry shut-outs, and had then had to ship their fish by air or by motorized banca.
- ▶ Consignees at Virac were having trouble inducing arrastre workers at the port to unload their cargoes whenever trucks were not standing by, with the result that the cargoes had sometimes to make another entire round-trip before being unloaded.

Passenger Services

The LSRS passenger survey on the Tabaco-Virac route was of limited usefulness; although the sample size of 104 passengers was satisfactory, response to many LSRS survey questions was poor. Most of the interviewed passengers were probably infrequent travelers; only 21 passengers indicated that they traveled the route 3 or more times a year. There was a good response to the question regarding service reliability, however, and 88 percent of the entire sample thought that reliability was good. This was definitely not the view of Catanduanes shippers, as identified above, who complained of the unreliability of the same vessel. The LSRS ascribes the difference of opinion to the low frequency of passenger travel, which may mean that a large majority of all passengers neither knew nor cared if the vessel was closely adhering to its schedule throughout the year. Many of the interviewed passengers may have based their response to the schedule-adherence question on whether or not the vessel left on time for their particular voyage.

Romblon

Cargo Services

Most cargo shipped between the islands of Romblon Province and the island of Luzon was being shipped as breakbulk cargo, in 1993, although RORO vessels were serving both Romblon Port and Odiongan (Poctoy Port). The only complaint heard by the LSRS regarding the service between Romblon and Manila was that it was not sufficiently frequent. Shippers were less pleased about the services between

Odiongan and Batangas, complaining that they were sometimes being shut out, for lack of space aboard the vessel, and that the vessel's crew was not giving adequate attention and care to proper stowage of cargo aboard the vessel. Shippers of fish nevertheless preferred shipping to Batangas, rather than to Manila, because the shorter time at sea and the availability of ice at Batangas made it possible to avoid significant spoilage in transit.

Passenger Services

There was a high proportion of frequent travelers on the Odiongan-Batangas route, which boded well for obtaining useful results from passenger surveys. Nearly all of the passengers surveyed by the LSRS indicated that they traveled the route at least once a year, and more than one-third traveled the route between 1 and 4 times per month. Of respondents to the travel-purpose question, 51 percent indicated that they were traveling for business purposes.

Fully two-thirds of these seasoned travelers expressed the view that services were not adequate to meet demand. The only service characteristic which interviewed passengers viewed favorably was operator adherence to schedule, where 83 percent viewed operator service schedule reliability as good. Otherwise passengers were more highly critical of this service than of any other service that surveyed by the LSRS, and a very high 87 percent of the passengers interviewed expressed the view that traffic congestion constituted a serious problem during the peak travel season. Another very high figure, relative to other vessels and routes surveyed by the LSRS, was that 37 percent of the passengers interviewed rated the attitude of the vessel's crew toward passengers as unacceptable; another 22 percent rated crew courtesy and helpfulness as poor. There was, also, a litany of other grievances about the service, namely: inadequate operator concern for safety; unsatisfactory space reservation system; disorganized vessel boarding; inadequate space for baggage stowage; poor baggage security; inadequate space to move about during the voyage (with 44 percent rating space availability as unacceptable); insufficient supply of drinking water; unsatisfactory state of toilets and sanitation facilities (fully three-quarters of passengers interviewed rated these as poor or unacceptable); and ventilation was poor to unacceptable (80 percent of respondents to the question). In the view of the LSRS, the willingness of the passengers to give the operator "his due", and rate his schedule adherence as good, despite all of their complaints about other aspects of his services, says something about the fairmindedness of the passengers. (A member of the LSRS team sailed this voyage during the survey and, thus, was able to personally vouch for the accuracy of passenger assessments of service inadequacies.) To "add insult to injury", the liner shipping operator was substantially overcharging for these services (30 percent above MARINA's 1993 official fork tariff maximum for third class passage

on the route).

Masbate

Cargo Services

Masbate was being served by twice-a-week liner service to Manila and once-a-week service to Cebu, in 1993, and by ferry services to the Sorsogon ports of Bulan and Pilar. The ferries were passenger ferries, and Masbate did not have any RORO ferry service at that time (the LSRS understands, however, that RORO ferry services were inaugurated between Masbate and Bulan in 1994). Masbate is an island that produces mainly for interisland trade and export (fisheries products, livestock, and copra) and requires inflows of nearly everything else. As recently as 1989 or 1990, fisheries products were being shipped from the island of Masbate mainly by air. By 1993, however, air shipment appeared to have become the "fallback" option. Fisheries products were instead going directly to Manila by sea whenever a vessel bound for Manila was due to call first at Masbate (i.e., on most Saturdays and Sundays), and, on other days, the fisheries products were being shipped by ferry to Bulan and trucked to Manila from there.

Shippers of livestock complained of occasional shut-outs, due to limited cargo space available in liner vessels, and shippers of copra complained of more regular shut-outs, which they ascribed to the personal interests of the shipping agents of the two liner operators serving Masbate.

Shippers did not complain about having only twice-a-week liner service to Manila, perhaps because service frequency was nevertheless relatively better than in the past, and there was reduced reliance on air transport. Shippers indicated that ferry service to Bulan was not adequate, but they did not specifically identify any need for RORO ferry service.

Passenger Services

The LSRS conducted passenger surveys on two liner shipping routes and two ferry routes serving Masbate. Principal findings are:

- ▶ The Manila-Masbate route was serving primarily vacationers, and those travelers generally rated the liner service highly, in terms of adequacy to meet demand, service reliability, operator concern with safety, boarding procedure, space reservation, and baggage accommodation. Most aspects of physical accommodation (ventilation, toilets, water, food, etc.) were rated as fair by majorities of the passengers, but sizable minorities in each case gave those aspects a

rating of poor. Of all the northern island routes surveyed by the LSRS, however, it was only in regard to this Manila-Masbate service that not a single passenger surveyed rated a single aspect of physical accommodation as unacceptable.

- ▶ The Masbate-Cebu service was being provided by the same vessel that the LSRS surveyed on the Manila-Masbate route, but passengers on the Masbate-Cebu route included businessmen, travel frequency was high (43 percent of LSRS' survey sample saying that they traveled the route one or more times per month); these passengers appear to have been more demanding, than those accommodated on the Masbate-Manila voyage leg. Once-a-week service to Cebu appears not to have been entirely satisfactory for these passengers, as one-third of the interviewed passengers expressed the view that services were inadequate to meet demand. The Masbate-Cebu passengers agreed with the majority of Manila-Masbate passengers that the operator showed adequate concern for safety; however, smaller proportions (but nevertheless majorities) of the former group than of the Manila-Masbate passengers graded service as satisfactory in regard to service reliability, space reservation, boarding procedure, and baggage accommodation.

- ▶ The two ferry services surveyed were viewed favorably by large majorities of small LSRS samples (22 passengers in one case and 13 in the other) in regard to adequacy to meet demand, except in the peak travel season, and operator concern for safety. On the Masbate-Pilar route, however, all 12 of the passengers responding to a question regarding crew courtesy and helpfulness rated the crew's attitude as unacceptable.

2. NORTHERN ISLANDS LINER SHIPPING & FERRY SERVICES

Introduction

The Northern Islands, as they are being defined in this LSRS Final Report, include the Romblon and Masbate groups of islands, and the islands of Mindoro, Marinduque, and Catanduanes. All of these islands are included in Regions IV and V of the Philippines, and in all cases their most important interisland connections are to the island of Luzon. Because of the nearness of most of these islands to Luzon, interisland shipping services are mainly ferry services, and many of these services are provided by RORO vessel. The islands of Mindoro and Masbate and the Romblon island group are also served by liner shipping operators.

Most of the liner shipping services to the Northern Islands originate from the Manila North Harbor (MNH), although there are also a few liner shipping connections to the principal ports of the Central and Western Visayas. Ferry service connections with Luzon originate at the Luzon ports of Batangas (all Mindoro ferry services), Bulan and Pilar (Masbate ferry services), Lucena (Marinduque ferry services), and Tabaco (Catanduanes ferry services). The ferry and liner shipping ports of the Northern Islands themselves are:

- The Mindoro principal ports of Calapan and San Jose, the ferry ports of Puerto Galera and Abra de Ilog, and the minor ports of Sablayan, Pinamalayan, Roxas, Mansalay and Mamburao.
- Marinduque principal ports of Balanacan and Sta. Cruz, and minor ports of Cawit (Boac) and Gasan.
- Romblon Province principal ports of Romblon and Poctoy (at Odiongán, Tablas Island), and the minor ports of San Agustin and Looc on Tablas Island, and Magdiwang and Cajidiocan on Sibuyan Island.
- The Masbate principal port of Masbate, and the minor ports of Cataingan, Esperanza, Cawayan, Placer, Balud, Mandaon, Aroroy, Baleno, and Uson on Masbate Island, and the Burias Island ports of San Pascual and Claveria and Ticao Island ports of Monreal and San Jacinto.
- Catanduanes principal ports of Virac and San Andres, and minor ports of Bato and Baras.

The lack of complete, clear reporting on the part of the operators serving the northern islands, and the voyage deviations

from franchised routes, make it impossible to accurately identify passenger capacity on several routes, much less levels of capacity utilization. Even less information was available at MARINA, during 1993-1994, on the cargo capacities of vessels, including vessel capacities for the accommodation of container twenty-foot equivalent units (TEUs), and RORO vessel accommodation of passenger car units (PCUs) or bus equivalent units (BEUs).

In 1994, MARINA and the LSRS made a joint effort to improve the vessel and shipping service records of MARINA, and a first Annual Domestic Shipping Route Inventory (ADSRI) was produced. Although ADSRI leaves much to be desired in regard to presenting a complete picture of services being operated in the northern islands (and elsewhere in the Philippines) it nevertheless represents an improvement over what existed before the joint effort was made. The tables presented in this chapter are based on information taken from the first ADSRI.

Shipping Operators, Routes & Vessels

Ferry services and liner shipping services which were franchised to ports of the northern islands, as of April 1994, are identified in Tables 2.1 and 2.2, respectively. Figure 2.1 shows the Sibuyan Sea island group of Mindoro, Marinduque and the Romblon islands, and the ferry and liner services being operated, in 1993-1994, to ports of those islands. Figure 2.2 shows the Bicolandia area, which includes the Bicol Peninsula of Luzon, the island of Catanduanes, and the Masbate Province islands. Of the ports of this area, only the port of Masbate is served by liner shipping services, with connections to both MNH and Cebu. Most of the ferry routes shown in the two figures are served by one or more RORO ferries, as well as by passenger ferries; exceptions are the Tabaco-San Andres route and the Masbate-Pilar route, where only passenger ferries are operating in 1994.

The figures do not include some routes where only motorized bancas are providing ferry services. Routes that are being regularly served by one or more motorized bancas, in 1993-1994, include the intraprovincial services of Romblon and Masbate provinces. Romblon Island has frequent banca service between Romblon Port and the Tablas port of San Agustin, and there are also banca services between Romblon and the Sibuyan Island port of Magdiwang. There are also regular banca services which operate from the Mindoro minor ports of Pinamalayan and Roxas to the islands of Marinduque and Tablas, respectively. These banca services and the needs for higher-standard services among the islands of Mindoro, Marinduque and Romblon Province are discussed in Volume XI of this LSRS Final Report.

Shipping services franchised to the ports of the six provinces

TABLE 2.1
FERRY VESSELS CALLING NORTHERN ISLAND PORTS
AS OF APRIL 1994

OPERATOR NAME VESSEL NAME	GRT	PAX CAP	SERV. TYPE	FRANCHISED ROUTE	NO. OF ROUND TRIPS/YEAR	VESSEL ANNUAL PASS. CAP/VYG LEG
AC SHIPPING LINES						
MB QUEEN AC VII			PASS/FERRY	PGAL-BTGS-PGAL		
MV PRINCESS AC - IV	70.3	276	PASS/FERRY	PGAL-BTGS-PGAL		
MB QUEEN AC - II	91.39	230	PASS/FERRY	PGAL-BTGS-TGLY-BTGS-PGAL	700	192,200
MB PRINCESS AC VI	34.43	149	PASS/FERRY	PGAL-PISA-TGLY-BTGS-TGLY-PISA-PGAL	350	80,500
ATIENZA, ALFREDO M.					350	52,150
MV PRINCESS MERMAID	229.47	285	PASS/CARGO	CLPN-BTGS-CLPN		
ATIENZA, BERNARDO					700	199,500
MB AC - I			PASS/FERRY	PGAL-BTGS-PGAL		
ATIENZA, EDUARDO N.						
MV ACE - I			PASS/FERRY	BTGS-CLPN-BTGS		
BALLESTEROS, VICTOR						
MBca THE SISTERS	10.33	30	PASS/FERRY	PBDM-BULN-PBDM		
MBC/ THREE SISTERS			PASS/FERRY	PBLN-BULN-PBLN	350	10,500
BICOLANDIA LINES, INC.						
MV EUGENIA			PASS/FERRY	TBCO-VRAC-TBCO		
CENTRAL RP LIGHTERAGE INC						
BRGE CRPL - VIII			N.D.	PREZ-ATMN-PREZ		
E. TABINAS-SAN PABLO ENT.						
MV MASBATE SP-I	94.35	153	PASS/FERRY	MSBT-BULN-MSBT		
MV NORTHERN SAMAR	466.87	498	PASS/FERRY	MTNG-ALLN-MTNG	350	53,550
EXEQUIEL ADONIS					700	348,600
MB ELENA			PASS/FERRY	GSAN-PMLY-GSAN		
FRANCO, ARISTOTILES						
MB JOJUN - III	14.43		PASS/FERRY	BLAN-SFER-LGND-MSBT-BLAN		
LECAROZ, FRANCISCO						
MV VIVA ANTIPOLLO - III	61.74	227	PASS/FERRY	COTT-SCRZ-COTT		
MONTENEGRO SHPG LINES INC					350	79,450
MB DOÑA MATILDE	37.31	150	PASS/FERRY	BTGS-ABDI-BTGS		
MB DON FRANCISCO	38.65	150	PASS/FERRY	BTGS-ABDI-BTGS	700	105,000
N.: MB DON VICENTE	53.88	155	PASS/FERRY	BTGS-ABDI-BTGS	700	105,000
MV N.S. DE ANTIPOLLO ST. JOHN			PASS/CARGO	LCNA-SCRZ-LCNA	700	108,500
PELLJERA, EFREN						
MBca GLORIA	11.81		PASS/FERRY	MSBT-PLAR-MSBT		
REGINA SHPG. LINES, INC.						
MV REGINA CALIXTA	198.25	254	PASS/FERRY	SAND-TBCO-SAND		
SI-KAT FERRIES, INC.					350	88,900
MB SI-KAT - II	148.89	138	PASS/FERRY	PGAL-BTGS-PGAL		
TAN, HORACIO T.					700	96,600
MV VIVA ANTIPOLLO - IV	98.91	345	PASS/CARGO	VRAC-CTDN-TBCO-CTDN-CTDB-VRAC		
MV VIVA ANTIPOLLO - V			N.D.	VRAC-TBCO-VRAC	350	120,750

TABLE 2.1
FERRY VESSELS CALLING NORTHERN ISLAND PORTS
AS OF APRIL 1994

(Continued)

OPERATOR NAME VESSEL NAME	GRT	PAX CAP	SERV. TYPE	FRANCHISED ROUTE	NO. OF ROUND TRIPS/YEAR	VESSEL ANNUAL PASS. CAP/VYG LEG
TAN, LILIA LO						
MV VIVA ANTIPOLLO - VI	142.5	420	PASS/FERRY	LCNA-SCRZ-LCNA	350	147,000
VIVA SHIPPING LINES, INC.						
MV LADY OF LOURDES			PASS/FERRY	BTGS-CLPN-BTGS		
MV VIVA PEÑAFRANCIA - IV	202.9	454	PASS/FERRY	BTGS-CLPN-BTGS	700	317,800
MV VIVA PEÑAFRANCIA - IX	310.05	615	PASS/FERRY	BTGS-CLPN-BTGS	700	430,500
MV VIVA PEÑAFRANCIA - VI	266	597	PASS/FERRY	BTGS-CLPN-BTGS	700	417,900
MV VIVA PEÑAFRANCIA - I	45	196	PASS/FERRY	COTT-BLNC-COTT	350	68,600
MV VIVA PEÑAFRANCIA - VII	327.18		PASS/FERRY	COTT-BLNC-COTT		
CANTELA, LUCIA						
MBca ROMA CHALLENGER - 2	4	30	PAS 3/FERRY	MNRL-MSBT-MNRL-PLAR-MNRL-BULN-MNRL	100	3,000
MBca ROMA CHALLENGER - I	9	30	PASS/FERRY	MNRL-MSBT-MNRL-PLAR-MNRL-BULN-MNRL	100	3,000

Reference: Annual Domestic Shipping Route Inventory

TABLE 2.2
LINER VESSELS CALLING NORTHERN ISLAND PORTS
AS OF APRIL 1994

OPERATOR VESSEL NAME	GRT	PAX CAP	SERV. TYPE	FRANCHISED ROUTE	NO. OF ROUND TRIPS/YEAR	VESSEL ANNUAL PASS. CAP/ VYG LEG
E.C. FABULA CORPORATION						
MV EUGENE - II	72		GEN. CARGO	MNLA-SABL-SJOS-BSNG-SIBL-NIBA-MNLA		
GRACE SHIPPING LINES						
MV YOUNG LADY			PASS/FERRY	CEBU-CTING-CEBU-CTING-CEBU-KWYN-CTING-CEBU		
KALAYAAN SHPG. LINES, INC						
MV KALAYAAN - VII	97	213	PASS/CARGO	COTT-ROMB-MGDG-SFER-CJCN-SFER-MGDG-ROMB-COTT	88	18,638
MV KALAYAAN - IX CHALLENGE	70	380	PASS/FERRY	COTT-SAGU-CRMN-ROMB-MGDG-SFER-CLSI-SFER-MGDG-ROMB-CRMN-SAGU-COTT	88	33,250
MERS LINES, INC.						
MV SALVE JULIANA			PASS/CARGO	MNLA-SAGN-ROMB-CJCN-ROMB-ABLG-SAGN-MNLA-ODIO-ROMB-ODIO-MNLA		
NEGROS NAV. CO., INC.						
MS STA. MARIA	1,110	963	PASS/CARGO	MNLA-CLSI-BCLD-CLSI-MNLA-ROMB-ILOI-ROMB-MNLA	70	67,410
SULFICIO LINES, INC.						
MV SURIGAO PRINCESS	1,036	812	PASS/CARGO	MNLA-MSBT-ORMC-CEBU-ORMC-MSBT-MNLA	50	40,600
MV DAVAO PRINCESS	3,395	1,427	PASS/CARGO	MNLA-ODIO-CEBU-DVAO-CEBU-ODIO-MNLA	50	71,350
VISAYAN TRANS. CO., INC.						
MV GOVERNOR TAFT			PASS/CARGO	CEBU-CBYG-ROMB-MNLA-ROMB-CBYG-CEBU		
VIVA SHIPPING LINES, INC.						
MV VIVA PENAFRANCIA - II	468	93	N.D.	BTGS-BUAN-GSAN-ODIO-LOOC-SAGU-ROMB-SAGU-LOOC-ODIO-GSAN-BUAN-BTGS	50	4,650
MV VIVA STA. ANA	337	684	PASS/FERRY	BTGS-SAJA-BTGS	100	68,400
MV VIVA PENAFRANCIA - III			PASS/FERRY	COTT-BLNC-PMLY-BLNC-COTT		
MV VIVA PENAFRANCIA - V			PASS/FERRY	COTT-BLNC-PMLY-BLNC-COTT		
WILLIAM LINES, INC.						
MV WILCON - VI			CONTAINER	MNLA-CDOR-NSPT-CEBU-MSBT-MNLA		
MV CEBU CITY	2,452	807	PASS/CARGO	MNLA-DMGT-CDOR-DMGT-MNLA-MSBT-MNLA	50	40,350
MV WILCON - II			CONTAINER	MNLA-TCLB-NSPT-TGBL-CEBU-MSBT-MNLA		

Reference: Annual Domestic Shipping Route Inventory, 1994

FIGURE 2.1
 NORTHERN ISLANDS LINER SHIPPING & FERRY SERVICES 1993

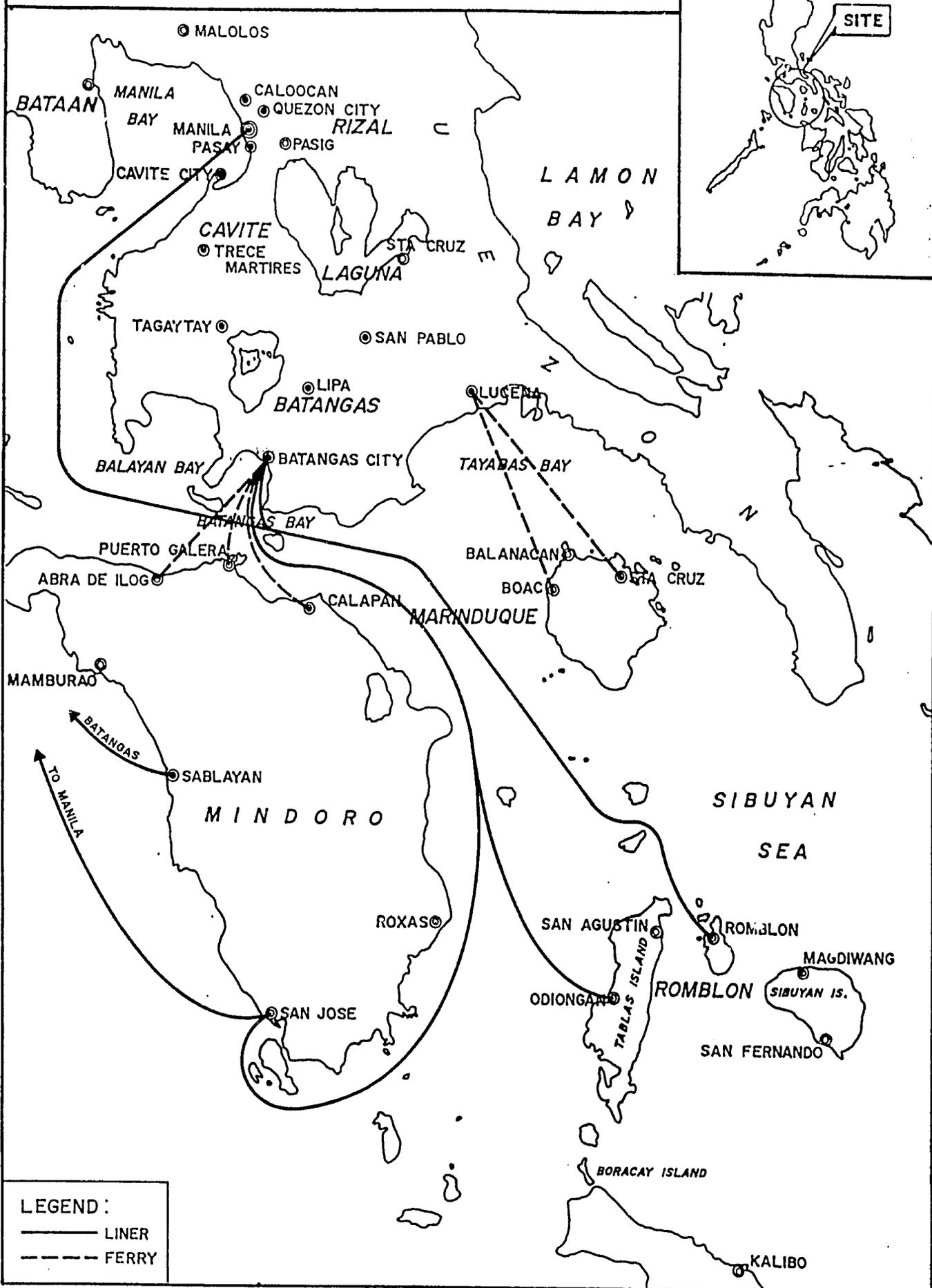
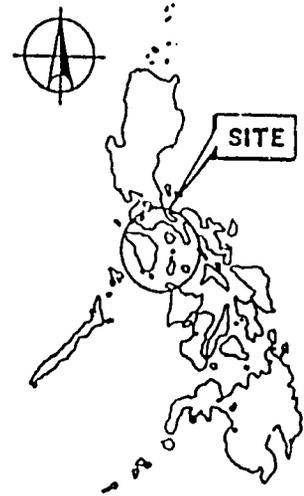
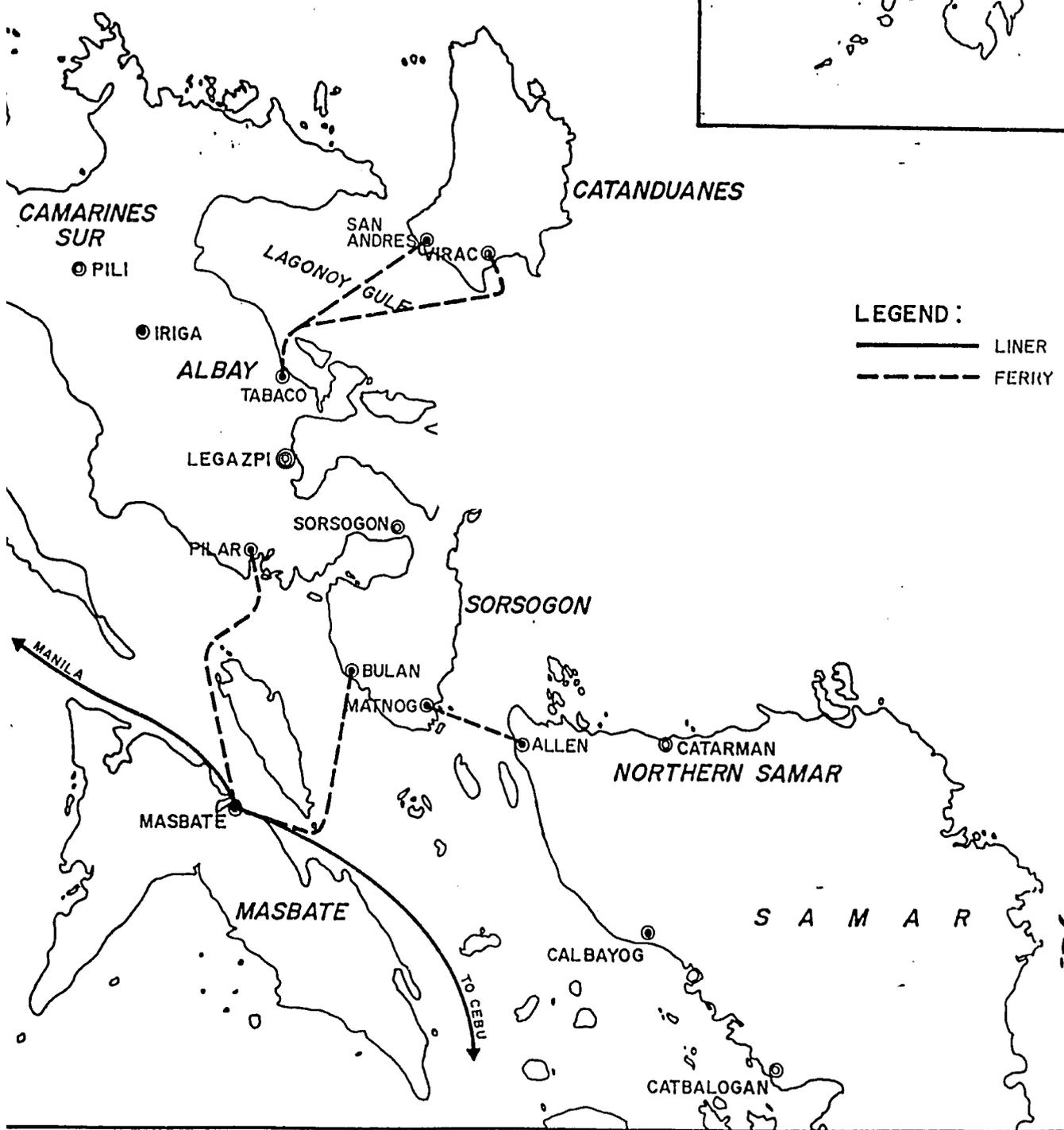
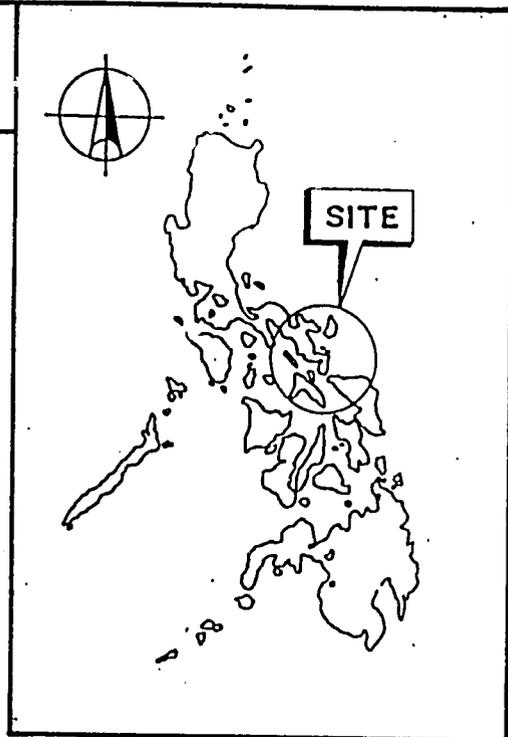


FIGURE 2.2
 BICOLANDIA LINER SHIPPING & FERRY SERVICES, 1994



comprising the northern islands are summarized below:

- **Oriental Mindoro.** This province has no liner shipping services, but is served by a number of ferries operating between the port of Batangas and the Oriental Mindoro ferry ports of Calapan and Puerto Galera. As shown in Table 2.1, Viva Shipping Lines is the principal operator on the Batangas-Calapan route, and had four vessels franchised for the route in April 1994. Competition to Viva on the route is being provided by two vessels operated by Alfredo and Eduardo Atienza. The Batangas-Puerto Galera route is being served by four small vessels of AC Shipping Lines, as well as by a vessel owned by Bernardo Atienza and by the Si-Kat II of Si-Kat Ferries, Inc. Other operators were applying for franchises to operate between Batangas and Calapan, in 1994, but a chief constraint is the capacity of the port of Batangas. Because of a long delay in the implementation of a Batangas Port development project, Viva Shipping was permitted by the PPA to construct RORO berths at the port, and Viva's vessels have preferential use of those berthing facilities.

- **Occidental Mindoro.** The principal shipping services of this province are the ferry services being operated between Batangas and the Mindoro north coast port of Abra de Ilog and the liner shipping services operated between the port of San Jose, on the far southwest coast of Mindoro, to both Batangas and Manila. The former services are provided mainly by three vessels of Montenegro Shipping Lines. The LSRS also surveyed a Viva Shipping vessel on this route, in 1993. The service connection between San Jose and Batangas is provided by a Viva Shipping Lines vessel, which has a rated capacity for 684 passengers. In 1993, the same Viva vessel was also serving the port of Sablayan. A cargo vessel is providing a service connection between MNH and the Mindoro ports of San Jose and Sablayan in 1994. At the time of LSRS fieldwork, in May 1993, a passenger/cargo vessel was serving the Manila-San Jose route once a week.

- **Marinduque.** The island is served mainly by RORO ferries operating between the Lucena City ports of Dalahican and Cotta and the Marinduque ports of Balanacan and Sta. Cruz. Viva is the only operator calling at the port at Balanacan, and two Viva vessels are franchised for the route. A vessel of Montenegro Shipping Lines and one owned by Francisco Lecaroz serve the Sta. Cruz-Lucena ferry route.

- **Romblon.** The province of Romblon has liner shipping service connections from its ports of Romblon and Poctoy

to the Luzon ports of MNH, Batangas and Lucena. Sulpicio Lines is franchised to provide services at Poctoy Port, with connections to MNH, Cebu and Davao. Another large liner shipping operator, Negros Navigation Company (NENACO) is franchised to serve the port of Romblon, providing service connections to MNH and Iloilo, but NENACO indicated to the LSRS that the Romblon legs of the route were no longer being served by the company, in 1993-1994, because they had proven to be unprofitable. Viva is franchised to serve both Poctoy and Romblon out of Batangas and to call at the Tablas Island ports of San Agustin and Looc, as well. Visayan Transport Company is franchised to provide service connections to Romblon from the ports of MNH, Cebu and Calbayog, Northern Samar. A vessel of MBRS Lines is franchised to serve both Poctoy and Romblon from MNH. Finally, vessels of Kalayaan Shipping Lines are franchised to serve Romblon Port, San Agustin and Magdiwang from Lucena.

- **Masbate.** Two of the largest interisland shipping operators, Sulpicio and William Lines, have passenger/cargo vessels which are franchised to directly serve Masbate Port from the MNH. Both Sulpicio's MV Surigao Princess and William Lines' MV Cebu City have rated capacities for slightly more than 800 passengers. The Sulpicio vessel provides Masbate with service connections to Cebu and Ormoc, as well as to the MNH. Two containerships of William Lines are also franchised to serve Masbate Port, providing service connections to both MNH and Cebu. The MV Young Lady of Grace Shipping Lines regularly operates between the Masbate Island port of Cataingan and Cebu. Ferry services are performed between Masbate Port and the Sorsogon port of Bulan by a vessel of E. Tabinas-San Pablo Enterprise. The LSRS was informed that RORO ferry services had been introduced, during 1994, between Masbate and Bulan, although PPA had not provided a RORO berth at either port. Small vessels are franchised to provide services between Masbate and the Sorsogon port of Pilar.

- **Catanduanes.** The island of Catanduanes is served from Tabaco Port on the east coast of Albay Province. Two vessels of Horacio Tan compete with the MV Eugenia of Bicolandia Lines on the Tabaco-Virac route. The MV Regina Calixta of Regina Shipping Lines is franchised to serve the Tabaco-San Andres route.

Route Capacity

It should be possible to estimate theoretical route capacities

from knowledge of the characteristics of vessels which are franchised to serve the routes and from knowledge of their service schedules. It should also be possible, from annual operator reports submitted to MARINA, to identify how theoretical route capacity has, for any year, differed from actual capacity because of: (i) extended downtime for some vessels; (ii) vessels being shifted in and out of routes by operators; and (iii) temporary and permanent changes in service schedules. As indicated in the introductory section of this chapter, however, the lack of complete information on vessel cargo capacities makes estimation of even the theoretical cargo capacities impossible.

MARINA also receives very incomplete information from operator annual reports on services actually performed to ports of the northern islands and traffic volumes actually accommodated. Table 2.3 presents the information in MARINA's records on cargo traffic accommodated over route links having northern island ports as ports of origin and/or destination. The most usable information presented in the table is that provided by NENACO for its Romblon Port links and the William Lines cargo data for the Manila-Masbate route link. The traffic data shown for Sulpicio Lines are as reported to MARINA.

Passenger capacities can be estimated for some routes because the rated capacities are known for a number of vessels, and estimates of the annual capacities of these vessels per voyage leg are shown in the right-hand columns of Tables 2.1 and 2.2. On the basis of these estimates, the following conclusions are possible:

- ▶ Of the six vessels franchised to serve the Batangas-Calapan route, annual passenger capacities are known for four vessels, and these add to more than 1.3 million per direction. In contrast, traffic on the route did not reach 425,000 passengers per direction in any year of the 1991-1993 period. Although the capacities of the other two vessels serving the route are not known, it seems likely that capacity utilization, in 1993-1994, was significantly less than one-third. Moreover, this estimate is based on a schedule of two round-trips per day. The route is only 24 n.m. in length, and three round-trips per vessel could be operated over an 18-hour schedule of services, as might be desirable during a period of peak travel demand.

- ▶ Of the six vessels serving the Batangas-Puerto Galera route, annual capacities for passenger accommodation are known for four vessels, and these add to 374,000 passengers per direction. The LSRS does not know the level of traffic on this route in 1993, but in 1992, traffic averaged approximately 60,000 passengers per direction (up from an average of 51,000 passengers per direction in 1991). The direct Batangas-Puerto Galera

TABLE 2.3
NORTHERN ISLAND LINER VESSEL CARGO TRAFFIC, 1992
(FREIGHT TONS)

COMPANY VESSEL & ROUTES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ANNUAL TOTAL	AVE MONTHLY
ASUNCION SHPG. LINES, INC														
ASUNCION - VI														
MANILA - BANTON				11									11	11
AIDA - II														
BANTON - PINAMALAYAN	11			67	38	8							116	29
PINAMALAYAN - BANTON	32			76	69	58	57	47	36	35	46	25	481	49
ABELON, REYNALDO														
DEO FRANCO														
STA. ANA PIER - PENAFRANCIA	10		9	9	11	9	9	9	7	6	9	11	100	9
BAHIAN, TORCUATO														
EARLY BIRD														
CEBU - CATAINGAN		10				12				14			36	12
BAZARTE, JESUS														
PETPAUL														
PENAFRANCIA - STA. ANA PIER	4	6	4	5	3	2	5	5	4	4	4	5	51	4
STA. ANA PIER - PENAFRANCIA	5	5	3	6	3	5	4	6	5	5	5	3	55	5
FLORES, PATRICIO F.														
ORIENT PRINCESS														
BANTON - PINAMALAYAN	36	33	36	13									118	30
HERAMIL, GEREMIAS B.														
BANWAG														
PENAFRANCIA - STA. ANA PIER	63	69	83	89	69	59	54	60	47	49	52	63	755	63
MAGONCIA, GENOVEVA														
MARVIN														
PENAFRANCIA - STA. ANA PIER	7	8	6	6	6	8	7	7	6	7	7	6	60	7
STA. ANA PIER - PENAFRANCIA	7	7	8	7	6	5	6	6	5	6	6	6	75	6
MACABATA, DANIELL M.														
JOHN DAVE														
ROMBLON - BAYBAY		156											156	156
NEGROS NAV. CO., INC.														
DON CLAUDIO														
ILOILO - ROMBLON										4	5	8	17	6
ROMBLON - MANILA									31	66	125	14	235	59
BACLOD - ROMBLON									57	54	15	7	133	33
MANILA - ROMBLON									57	99			156	78
ROMBLON - ILOILO									50	217	211	150	628	157
ROMBLON - BACOLOD									11	112	173	65	361	90
STA. MARIA														
MANILA - ROMBLON	248	51	721	5	3	23	104	792					1,946	243
ROMBLON - ILOILO	204	244	88	184	299	171	143	96					1,421	178
ROMBLON - BACOLOD	120	285	88	114	114	48	121	60					861	108
ILOILO - ROMBLON	44	51	5	21	17	3	7	7					159	29

TABLE 2.3
NORTHERN ISLAND LINER VESSEL CARGO TRAFFIC, 1992
(FREIGHT TONS)
(Continued)

COMPANY VESSEL & ROUTES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ANNUAL TOTAL	AVE MONTHLY
BACOLOD - ROMBLON	31	34	10	28	61	8	34	14					219	27
ROMBLON - MANILA	162	189	63	103	283	238	211	177					1,427	178
REGINO NARANDAN LYN														
BANTAYAN - ABRA DE ILOG		14		14		14		14				14	70	14
SAN RAFAEL BANTAYAN - ABRA DE ILOG	15		15		15					15	15		75	15
MNC CHARTERING CO., INC. CONSOLACION														
DAVAO - MASBATE			1,400										1,400	1,400
DAVID JR. DAVAO - VIRAC										1,240			1,240	1,240
DON EUGENIO DAVAO - VIRAC			1,200			1,212							2,412	1,206
GAZELLE DAVAO - VIRAC												1,440	1,440	1,440
SOLID TRES DAVAO - MASBATE							1,880						1,880	1,880
FLAYDA, CESAR JOAN REX - III														
PENAFRANCIA - STA. ANA PIER	6	6	7	8	6	8	8	6					55	7
STA. ANA PIER - PENAFRANCIA	12	14	12	11	14	11	12	8	8	6	8	8	124	10
REQUINA, ISIDRO SAMAL QUEEN														
PENAFRANCIA - STA. ANA PIER	6	5	6	6	7	8	6	4	6	7	6	8	74	6
ROY, JERSON MARGIELYN														
ROMBLON - ABRA DE ILOG	450	349		400	450			350	350			450	2,799	400
ROMBLON - ABRA DE ILOG	450	349		400	450			350	350			450	2,799	400
ROMBLON - CATICLAN			350							350			700	350
ROMBLON - BOFACAY							450						450	450
ROMBLON - AKLAN												359	359	359
SULFICIO LINES, INC. CEBU PRINCESS														
CEBU - MASBATE	843,895	793,605	383,317	617,834	942,078	964,087	253,124	919,701	370,147	364,764		291,482	6,744,834	613,894
ORMOC - MASBATE	33,811	80,405	31,530	156,347	170,753	171,517	60,945	243,405	128,387	121,098		5,007	1,203,205	109,382
CALBAYOG - MASBATE	260	402	85										747	249
MASBATE - MANILA	487,160	461,555	360,823	1,139,854	1,246,590	169,180	53,592	540,398	291,512	124,835		59,000	4,934,709	448,610
MANILA - MASBATE	405,909	337,561	122,254	285,353	498,096	479,379	150,549	635,774	285,507	138,272		52,976	3,391,624	308,329
MASBATE - CALBAYOG	11	241	2	190	132								577	96
MASBATE - ORMOC	3,358	2,696	2,813	5,601	211	5,009	80	194	2,476	1,058		380	22,076	2,007
MASBATE - CEBU	60,372	175,804	43,860	73,218	34,091	115,245	53	173,106	555,527	367,290		16,923	1,615,489	146,863

TABLE 2.3
NORTHERN ISLAND LINER VESSEL CARGO TRAFFIC, 1992
(FREIGHT TONS)
(Continued)

COMPANY VESSEL & ROUTES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	ANNUAL TOTAL	AVE MONTHLY
SAN VICENTE SHPG. LINES														
SAMPAGUITA - VI														
HAGNAYA - MASBATE					198	191	22						411	137
MASBATE - HAGNAYA					295	306	27						628	209
VARGAS, ANDREA F.														
ANNA														
PENAFRANCIA - STA. ANA PIER	16	16	18	8	10	12	11	12	10	11	12	13	149	12
STA. ANA PIER - PENAFRANCIA	13	10	7	9	5	8	8	10	9	9	10	12	111	9
WILLIAM LINES, INC.														
CEBU CITY														
MANILA - BATUAN	964	73	208	480	321	571	433	407	685	345	877		5,364	488
BATUAN - MANILA	345	234		301	708	763	1,243	324	1,593	874	1,115	171	7,669	697
BATUAN - TAGBILARAN	98										107		205	103
TAGBILARAN - BATUAN			8										8	8
MANILA - MASBATE	3,675	4,963	6,852	3,310	4,394	7,124	5,767	7,136	4,850	4,765	5,035	5,648	63,519	5,293
MASBATE - MANILA	3,677	4,157	3,596	2,026	4,368	2,747	2,130	3,430	1,350	3,528	2,599	1,542	35,140	2,928
TACLOBAN CITY														
MANILA - PANDAN	55	11	352	119	629						38	731	1,964	281
PANDAN - OZAMIS				70	19							13	102	34
PANDAN - MANILA		6	751	198	282						68		1,305	261
OZAMIS - PANDAN					2								2	2

Source : Shipping Operators Annual Report , 1992

route is only 17 n.m. in length, so that three round-trips per vessel per day would be possible within a 15-hour operating day. Thus, this route appears to have ample capacity in 1993-1994.

- ▶ The three vessels franchised to serve the Batangas-Abra de Ilog route have a combined annual capacity to accommodate 318,500 passengers per direction, operating two round-trips per day (route length is 24 n.m.). In comparison to this level of capacity, the 1992 traffic level was approximately 58,000 passengers per direction, up from 44,000 per direction in 1991 (the LSRS does not have information on the 1993 traffic level on the route).
- ▶ The Viva Shipping vessel which performs two round-trips per week between San Jose and Batangas can accommodate 68,400 passengers per direction per year, with allowance for two weeks of downtime. Passenger traffic on this route averaged 22,000 per direction, in 1992, up slightly from 21,000 per direction the preceding year. In 1993, total passenger traffic at the port of San Jose numbered about 49,000 passengers, or an average of less than 25,000 per direction (including the San Jose-Manila route, as well as the route to Batangas). Thus, the single Viva vessel has sufficient capacity to accommodate current levels of traffic through the port. However, the LSRS learned, during the course of fieldwork carried out at San Jose, that service frequency was not sufficient at San Jose to accommodate all potential demand, and some travelers were opting to travel by road to Abra de Ilog, where they could board a ferry for Batangas.
- ▶ The ferry routes between Marinduque and the Lucena City ports are somewhat longer than those between Batangas and the Mindoro north coast (Balanacan-Dalahican has a route length of 28 n.m., and Sta. Cruz-Dalahican is slightly longer). The franchised vessels can perform only one round-trip during daylight hours, so the annual capacities for these vessels, as shown estimated in Table 2.1, are significantly less than the passenger accommodation capacities of vessels operating between Batangas and the Mindoro north coast. The Viva Shipping vessel serving the Balanacan-Dalahican route, for which passenger capacity is known, can accommodate 68,600 passengers per annum. The other Viva vessel franchised for the route is much larger. Passenger traffic at the port of Balanacan, in 1993, exceeded 70,000 passengers per direction, and LSRS fieldwork on Marinduque in that year suggests that there was at least a seasonal passenger capacity constraint on the route. The two vessels serving the Sta. Cruz-Dalahican route have a combined annual capacity for the accommodation of 226,000

passengers per direction. Passenger traffic at the port of Sta. Cruz totaled nearly 100,000 passengers per direction in 1993.

- ▶ The only vessel franchised to serve the Batangas connections to a number of Romblon Province ports has an estimated capacity of fewer than 5,000 passengers per voyage leg per annum, as shown in Table 2.2. When the LSRS surveyed this route, in 1993, a different Viva Shipping vessel was operating it, and there was a severe capacity constraint, as well as low service standards (see Chapter 4 discussion and Annex B detailed survey results). In 1991, an average of more than 33,000 passengers per direction traveled between Poctoy Port and Batangas Port, and this traffic declined to approximately 27,000 passengers per direction the following year. From the April 1994 information on franchised vessels, it would appear that the capacity constraint on this route had not yet been eliminated.
- ▶ The route between Poctoy and Manila has an annual passenger accommodation capacity of more than 70,000 passengers per direction, provided that Sulpicio's franchised vessel, the MV Davao Princess, regularly calls at Poctoy, as it is franchised to do. Although 70,000 passengers could then be accommodated between Poctoy and Manila in each direction, the majority of these passengers would not be Poctoy-MNH passengers, but would be traveling between Davao and MNH or Cebu and MNH. A ten percent allocation of space for Poctoy-MNH passengers would mean that about 7,000 of these passengers could be accommodated in each direction over the period of a year. The MV Salve Juliana, for which the LSRS could obtain no capacity information, also serves the Poctoy (and Romblon) connection to MNH. Total passenger traffic at Poctoy, in 1993, numbered more than 94,000 passengers. On the basis of vessel franchising information, passenger/cargo vessels serving Poctoy were probably fully utilized for all service connections, during 1993.
- ▶ The two vessels providing Masbate Port with service connections to MNH each have annual capacities for the accommodation of 40,000 passengers on the route link, but one of the vessels is also accommodating Cebu-MNH and Ormoc-MNH passengers between Masbate and Manila. Thus, the combined annual capacity for the accommodation of Masbate-MNH passengers is probably around 50,000 passengers per direction per annum. Total passenger traffic at Masbate Port, in 1993, was just under 100,000 per direction. Many of these were ferry passengers, however, and others were traveling between Masbate and Cebu, so capacity for the accommodation of passengers on

the Masbate-MNH route link was probably adequate. Ferry capacity, including services connecting Masbate Port to the Sorsogon ports of Bulan and Pilar, significantly exceeded 50,000 passengers per direction per annum. Total passenger traffic at Bulan Port, in 1993, was slightly less than 50,000, or an average of 25,000 passengers per direction, most of whom were traveling to or from Masbate Port. With the advent of ROKO ferry services on the Masbate-Bulan route, in 1994, as reported to the LSRS by PPA, Masbate probably has adequate passenger accommodation capacity for its connections to Luzon.

Only one of the vessels serving the Tabaco-Virac route has a capacity known to the LSRS, and this capacity exceeds 120,000 passengers per direction per annum. Passenger traffic at Virac averaged under 50,000 per direction in 1993, so capacity for passengers appears to have been ample in that year. The MV Regina Calixta, which is franchised to serve the Tabaco-San Andres route, has a capacity for accommodating nearly 89,000 passengers per direction per annum. The port of San Andres had a total of nearly 26,000 passengers per direction in 1992, and traffic declined to 19,000 per direction in the following year.

3. CARGO SERVICES EVALUATION

Introduction

Chapter 2 has identified the ferry and liner shipping services which are franchised, in 1994, to serve ports of the northern islands (defined in this LSRS Final Report to include the islands of Mindoro, Marinduque, Catanduanes, Romblon Province, and Masbate Province). Chapter 3 examines the cargo services which were being provided by most of these same operators and vessels, during mid-1993, i.e., at the time that LSRS fieldwork was conducted in the northern islands to determine the extent to which services were adequate, and met the needs of northern island shippers and buyers. This chapter first reviews cargo traffic levels at ports of the northern islands and of the Bicol Peninsula. The results of LSRS surveys are then presented, by island or island group.

Cargo Traffic

In terms of cargo volumes shipped, RORO shipping services dominate the Batangas-Mindoro shipping routes (to the Mindoro ports of Calapan, Abra de Ilog, Puerto Galera and San Jose). The majority of the traders and shippers utilize RORO vessels in transporting agricultural products loaded on cargo jeeps and trucks from Mindoro to Manila via Batangas. Most of the cargo jeeps are elongated vehicles, many with a four-tired rear axle, that have the capacity to accommodate 5 or 6 tons of agricultural commodities and other cargoes.

RORO services are provided, also, between the Lucena City port of Dalahican and the two Marinduque ports of Balanacan and Sta. Cruz, but the vessels are smaller, and have less capacity for the accommodation of road vehicles. Such is also the case on the Tabaco-Virac route. The LSRS has no information regarding the RORO services which were initiated on the Masbate-Bulan route, in 1994, several months after the LSRS surveys had been completed in the area.

Tables 3.1 through 3.6 present cargo traffic information for the principal ports of the northern islands and the Bicol Peninsula. Because of the importance of RORO ferries, large volumes of "cargo" comprise road vehicles moved aboard RORO ferries, rather than any cargoes being traded. Calapan Port accommodates much higher levels of road vehicles than any of the other ports of the northern islands, with tonnages of vehicles being in the range of 250,000 to 300,000 per annum, in each-year of the 1991-1993 period. These vehicles were hauling only about 40,000 tons of cargo per annum from Batangas to Calapan, but were

TABLE 3.1

**MINDORO ISLAND PORT
CARGO TRAFFIC, 1993**
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
CALAPAN														
Domestic Cargo	53,018	50,963	48,533	61,052	59,671	60,607	55,541	57,268	69,755	61,488	60,795	44,883	683,594	56,966
Inbound (Breakbulk)	23,254	18,010	12,943	17,939	17,215	18,622	16,978	18,529	23,004	18,682	19,431	15,458	220,065	18,339
Outbound (Breakbulk)	29,764	32,953	35,610	43,113	42,456	41,985	38,563	38,739	46,751	42,806	41,364	29,425	463,529	38,627
Seasonality Index	93	89	85	107	105	106	97	101	122	108	107	79		
SAN JOSE														
Domestic Cargo	19,863	22,023	21,795	18,599	23,076	28,195	25,797	20,378	19,304	15,788	22,778	21,925	259,521	21,627
Inbound (Breakbulk)	6,554	6,574	7,164	7,302	6,925	9,325	10,204	7,155	7,664	7,381	8,447	7,986	92,681	7,723
Outbound (Breakbulk)	13,309	15,449	14,631	11,297	16,151	18,870	15,593	13,223	11,640	8,407	14,331	13,939	166,840	13,903
Seasonality Index	92	102	101	86	107	130	119	94	89	73	105	101		
GRAND-TOTAL MINDORO														
Domestic Cargo	72,881	72,986	70,348	79,651	82,747	88,802	81,338	77,646	89,059	77,276	83,573	66,808	943,115	78,593
Inbound (Breakbulk)	29,808	24,584	20,107	25,241	24,140	27,947	27,182	25,684	30,668	26,063	27,878	23,444	312,746	26,062
Outbound (Breakbulk)	43,073	48,402	50,241	54,410	58,607	60,855	54,156	51,962	58,391	51,213	55,695	43,364	630,369	52,531
Seasonality Index	93	93	90	101	105	113	103	99	113	98	106	85		

Note: At Berth Only

Source: Philippine Ports Authority

TABLE 3.2

**MARINDUQUE ISLAND PORT
CARGO TRAFFIC, 1993**
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
BALANACAN														
Domestic Cargo	8,659	11,224	10,275	13,072	11,704	10,605	12,178	11,859	12,849	9,057	8,862	7,225	127,569	10,631
Inbound (Breakbulk)	5,097	7,220	6,201	8,106	7,030	5,937	7,243	7,259	8,414	5,291	5,145	4,168	77,111	6,426
Outbound (Breakbulk)	3,562	4,004	4,074	4,966	4,674	4,668	4,935	4,600	4,435	3,766	3,717	3,057	50,458	4,205
Seasonality Index	81	104	97	123	110	100	115	112	121	85	83	68		
STA. CRUZ														
Domestic Cargo	2,039	3,325	4,135	3,974	7,103	8,378	4,969	8,284	7,799	11,175	18,034	18,468	97,683	8,140
Inbound (Breakbulk)	1,261	1,770	2,883	2,834	3,851	4,932	2,983	4,725	4,029	6,045	11,216	11,067	57,596	4,800
Outbound (Breakbulk)	778	1,555	1,252	1,140	3,252	3,446	1,986	3,559	3,770	5,130	6,818	7,401	40,087	3,341
Seasonality Index	25	41	51	49	87	109	61	102	98	157	222	227		
GRAND-TOTAL MARINDUQUE														
Domestic Cargo	10,698	14,549	14,410	17,046	18,807	18,983	17,147	20,143	20,648	20,232	26,896	25,693	225,252	18,771
Inbound (Breakbulk)	6,358	8,990	9,084	10,940	10,881	10,869	10,226	11,984	12,443	11,336	16,361	15,235	134,707	11,226
Outbound (Breakbulk)	4,340	5,559	5,326	6,106	7,926	8,114	6,921	8,159	8,205	8,896	10,535	10,458	90,545	7,545
Seasonality Index	57	78	77	81	100	101	91	107	110	108	143	157		

Note: At Berth Only

Source: Philippine Ports Authority

TABLE 3.3
ROMBLON ISLAND PORT
CARGO TRAFFIC, 1993
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
ROMBLON														
Domestic Cargo	7,556	5,581	5,177	3,516	6,863	2,356	4,400	4,094	4,450	5,324	4,469	2,650	56,436	4,703
Inbound (Breakbulk)	3,378	1,990	1,487	1,138	1,720	1,379	1,980	1,634	1,457	1,597	1,766	1,049	20,575	1,715
Outbound (Breakbulk)	4,178	3,591	3,690	2,378	5,143	977	2,420	2,460	2,993	3,727	2,703	1,601	35,861	2,988
Seasonality Index	101	119	111	95	106	90	94	87	95	113	95	86		
POCTOY (ODIONGAN)														
Domestic Cargo	3,460	1,515	2,575	2,312	2,372	2,575	1,120	1,306	2,546	2,918	2,751	2,738	28,188	2,349
Inbound (Breakbulk)	2,588	899	1,780	1,275	814	1,876	640	815	1,182	1,816	1,587	1,825	17,097	1,425
Outbound (Breakbulk)	872	616	795	1,037	1,558	699	480	491	1,364	1,102	1,164	913	11,091	924
Seasonality Index	107	64	110	98	101	110	86	86	108	124	117	117		
GRAND-TOTAL ROMBLON														
Domestic Cargo	11,016	7,096	7,752	5,828	9,235	4,931	5,520	5,400	6,996	8,242	7,220	5,388	84,624	7,052
Inbound (Breakbulk)	5,966	2,889	3,267	2,413	2,534	3,255	2,620	2,449	2,639	3,413	3,353	2,874	37,672	3,139
Outbound (Breakbulk)	5,050	4,207	4,485	3,415	6,701	1,676	2,900	2,951	4,357	4,829	3,867	2,514	46,952	3,913
Seasonality Index	106	101	110	83	101	90	98	97	99	117	102	96		

TABLE 3.4
MASBATE PORT
CARGO TRAFFIC, 1993
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
Total Cargo Throughput	14,317	10,615	16,936	10,631	13,901	13,477	14,778	14,339	14,693	12,036	10,325	10,687	156,735	13,061
Domestic Cargo	14,317	10,615	11,936	10,631	13,901	13,477	14,778	14,339	14,693	12,036	10,325	10,266	151,314	12,610
Inbound	8,902	5,232	6,535	5,526	8,292	6,663	8,788	7,791	7,998	7,604	6,244	6,462	86,037	7,170
Breakbulk	7,386	4,287	5,266	4,417	7,024	5,320	7,508	6,478	6,287	6,123	4,377	4,884	69,357	5,780
Containerized	1,516	945	1,269	1,109	1,268	1,343	1,280	1,313	1,711	1,481	1,867	1,578	16,680	1,390
Outbound	5,415	5,383	5,401	5,105	5,609	6,814	5,990	6,548	6,695	4,432	4,081	3,804	65,277	5,440
Breakbulk	5,146	4,767	4,680	4,633	4,885	5,931	5,201	5,856	6,014	3,986	3,169	2,891	57,159	4,763
Containerized	269	616	721	472	724	883	789	692	681	446	912	913	8,118	677
Foreign Cargo (Breakbulk)			5,000										421	452
Import													421	421
Export			5,000										5,000	417
Seasonality Index	114	84	134	84	110	107	117	114	117	95	82	85		

TABLE 3.5
VIRAC PORT
CARGO TRAFFIC, 1993
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
Domestic Cargo (Breakbulk)	2,448	3,933	4,532	4,643	5,757	6,313	4,757	7,962	7,332	6,237	7,009	6,766	67,689	5,641
Inbound	2,059	3,268	3,831	3,593	4,071	5,173	3,434	6,357	5,785	4,941	5,590	5,198	53,300	4,442
Outbound	389	665	701	1,050	1,686	1,140	1,323	1,605	1,547	1,296	1,419	1,568	14,389	1,199
Seasonality Index	83	90	80	82	102	112	84	141	130	111	124	120		

Note: At Berth Only

Source: Philippine Ports Authority

TABLE 3.6
BICOL PENINSULA PORT
CARGO TRAFFIC, 1993
(In Metric Tons)

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE.
LEGASPI PORT														
Total Cargo Throughput	18,131	20,240	12,059	15,210	25,524	16,972	30,237	10,079	17,293	7,356	18,171	17,594	214,866	17,906
Domestic Cargo (Breakbulk)	18,131	20,240	12,059	15,210	25,524	16,972	26,941	16,079	17,293	7,356	18,171	17,594	211,570	17,631
Inbound	14,293	16,201	8,759	9,939	19,283	9,615	19,736	13,136	14,594	6,082	16,075	15,663	163,376	13,615
Outbound	3,838	4,039	3,300	5,271	6,241	7,357	7,205	2,943	2,699	1,274	2,096	1,931	48,194	4,016
Foreign Cargo							3,296						3,296	275
Import (Breakbulk)							3,296						3,296	275
Seasonality Index	107	118	48	96	145	96	172	91	98	42	143	109		
BULAN PORT														
Total Cargo Throughput	2,017	2,381	4,175	3,015	3,577	2,990	4,384	3,878	3,983	3,260	2,291	2,301	38,252	3,188
Domestic Cargo	2,012	2,381	4,170	3,015	3,557	2,990	4,374	3,868	3,983	3,250	2,291	2,301	38,192	3,183
Inbound (Breakbulk)	609	495	246	1,170	460	460	676	405	1,504	433	576	1,289	8,223	694
Outbound	1,403	1,886	3,924	1,845	3,097	2,530	3,698	3,463	2,479	2,817	1,715	1,012	29,869	2,489
Breakbulk	1,085	1,500	3,410	900	2,100	1,656	2,685	2,638	1,773	2,420	1,300	570	22,037	1,836
Containerized	318	386	514	945	997	874	1,013	825	706	397	415	442	7,832	653
Foreign Cargo (Breakbulk)	5		5		20		10	10		10			60	5
Import	5		5		20								30	3
Export							10	10		10			30	3
Seasonality Index	83	76	131	96	112	94	122	122	123	102	72	72		
MATNOG PORT														
Total Cargo Throughput	52,567	58,106	55,105	68,561	76,858	73,231	63,193	63,789	62,799	61,840	57,774	65,623	759,446	63,287
Domestic Cargo (Breakbulk)	52,567	58,106	55,105	68,561	76,858	73,231	63,192	63,789	62,799	61,840	57,774	65,623	759,445	63,287
Inbound	26,833	30,011	28,100	34,799	38,503	36,699	31,045	32,275	30,849	30,646	29,152	31,720	380,640	31,720
Outbound	25,734	28,095	27,005	33,762	38,355	36,532	32,147	31,514	31,950	31,194	28,622	33,895	378,805	31,567
Foreign Cargo							1						1	0
Export (Breakbulk)							1						1	0
Seasonality Index	81	92	87	108	121	116	100	103	99	91	81	104		
PASACAO PORT														
Domestic Cargo (Breakbulk)	7,895	7,587	5,562	9,264	9,156	6,726	5,593	4,469	7,484	4,434	5,260	7,746	81,176	6,765
Inbound (Breakbulk)	6,661	6,186	5,014	6,798	6,215	6,072	5,241	3,669	7,268	4,221	4,930	7,229	69,504	5,792
Outbound	1,234	1,401	548	2,466	2,941	654	352	800	216	213	330	517	11,672	973
Breakbulk	1,234	1,401	548	2,466	411	654	352		216	213	330	517	8,342	695
Bulk					2,530			800					3,330	278
Seasonality Index	117	112	82	137	133	99	83	86	113	88	71	118		
TABACO PORT														
Total Cargo Throughput	9,781	10,427	5,001	4,447	9,700	11,670	9,991	11,727	13,633	9,579	7,926	6,563	110,445	9,204
Domestic Cargo	3,716	6,427	5,001	4,447	8,216	11,670	5,121	10,992	8,133	5,850	7,926	6,488	83,987	6,999
Inbound (Breakbulk)	883	4,092	3,103	1,439	5,538	7,363	2,686	8,301	4,923	3,364	3,731	4,249	49,672	4,139
Outbound	2,833	2,335	1,898	3,008	2,678	4,307	2,435	2,691	3,210	2,486	4,195	2,239	34,315	2,860
Breakbulk	1,444	2,335	1,598	2,052	2,678	2,448	2,435	2,691	3,210	2,486	2,439	2,239	28,055	2,338
Bulk	1,389		300	956		1,859			3,210	2,486	1,756		6,260	522
Foreign Cargo	6,065	4,000			1,484		4,870	735	5,500	3,729		75	26,458	2,205
Import	1,065				1,484		4,870	735	5,500	3,729			17,383	1,449
Breakbulk									5,500	3,729			9,229	769
Bulk	1,065				1,484		4,870	735					8,154	680
Export (bulk)	5,000	4,000										75	9,075	756
Seasonality Index	83	92	71	64	117	147	73	147	116	84	113	93		
GRAND-TOTAL BICOL PENINSULA														
Total Cargo Throughput	90,391	98,741	81,902	100,497	124,815	111,589	113,398	99,942	105,192	86,469	91,422	99,827	1,204,185	100,349
Domestic Cargo	84,321	94,741	81,897	100,497	123,311	111,589	105,221	99,197	99,692	82,730	91,422	99,752	1,174,370	97,864
Inbound (Breakbulk)	49,279	56,985	45,222	54,145	69,999	60,269	59,384	57,786	59,138	44,746	54,464	60,158	671,515	55,960
Outbound	35,042	37,756	36,675	46,352	53,312	51,380	45,837	41,411	40,554	37,984	36,958	39,594	502,855	41,905
Breakbulk	33,335	37,370	35,861	44,451	49,785	48,647	44,824	39,786	39,848	37,587	34,787	39,152	485,433	40,453
Bulk	1,389		300	956	2,530	1,859		800			1,756		9,590	799
Containerized	318	386	514	945	997	874	1,013	825	706	397	415	442	7,832	653
Foreign Cargo	6,070	4,000	5		1,504		8,177	745	5,500	3,739		75	29,815	2,485
Import	1,070		5		1,504		8,166	735	5,500	3,729			20,709	1,726
Breakbulk	5		5		20		3,296		5,500	3,729			12,555	1,046
Bulk	1,065				1,484		4,870	735					8,154	680
Export	5,000	4,000						11	10			75	9,106	759
Breakbulk								11	10				31	3
Bulk	5,000	4,000										75	9,075	756
Total (Breakbulk, Bulk & Containerized)	90,391	98,741	81,902	100,497	124,815	111,589	113,398	99,942	105,192	86,469	91,422	99,827	1,204,185	100,349
Breakbulk	82,619	94,355	81,088	98,596	119,804	108,856	107,515	97,582	104,486	86,072	89,251	99,310	1,169,534	97,461
Bulk	7,454	4,000	300	956	4,014	1,859	4,870	1,535			1,756	75	26,819	2,235
Containerized	318	386	514	945	997	874	1,013	825	706	397	415	442	7,832	653
Seasonality Index	92	101	84	103	128	114	116	102	107	88	93	102		

Note: At Berth Only
Source: Philippine Ports Authority

mostly filled to capacity in the opposite direction. In 1993, more than 320,000 tons were hauled aboard cargo vehicles from Calapan to Batangas. Prior to 1993, there had also been fairly substantial quantities of breakbulk cargoes moved aboard Batangas-Calapan ferries, but these considerably diminished in 1993. The cargo throughput of 684,000 tons in 1993 (see Table 3.1) was considerably down from the record level of 796,000 tons in 1992, and was slightly lower than the throughput levels of 1990 and 1991. The 1990-1993 throughput average of 724,000 tons per annum was nearly one-half million tons higher than the 1980-1983 throughput average of just 229,000 tons per annum, and was 60 percent higher than the 452,000 ton annual throughput average of the 1984-1988 period.

The 1993 cargo throughput total of nearly 260,000 tons shown in Table 3.1 for San Jose Port excludes approximately 22,000 tons of cargo accommodated at anchorage in that year. In 1992, approximately 30,000 tons of road vehicles was moved in each direction between San Jose and Batangas, and this traffic grew by approximately one-third to exceed 40,000 tons per direction in 1993. During the same two-year period, an annual average of 66,000 tons of palay and milled rice was shipped from the port, and shipments of "crude minerals" (mostly salt) averaged more than 42,000 tons per annum.

Cargo traffic at the Marinduque ports of Balanacan and Sta. Cruz increased by nearly 50 percent from 1992 to 1993 because of the introduction of RORO vessel service at Sta. Cruz in the latter year. In 1989, cargo throughput had increased by more than 100 percent above the levels of any year of the 1981-1988 period, because of the 1988 start-up of RORO services at Balanacan Port. In 1992, Balanacan had 27,000 tons of road vehicles moving in each direction through the port, and this traffic rose to 30,000 tons per direction of the following year. Whereas road vehicle movement through Sta. Cruz had been virtually nil (7 tons) in 1992, the port registered an average of 27,000 tons of road vehicles per direction in 1993. Copra outflows through the two ports averaged a combined 19,000 tons per annum during 1992-1993.

Cargo traffic at the two principal ports of Romblon Province has never reached a combined total of 100,000 tons in any year, and the combined throughput level in 1993 was under 85,000 tons (see Table 3.3). The principal commodity shipped from the province is marble, with outflows from Romblon Port exceeding 20,000 tons, in 1991, before dropping to 14,000 tons and 10,000 tons in 1992 and 1993, respectively. Much of the cargo traffic at Poctoy, in 1993, consisted of road vehicles (14,000 tons) carrying cargo (4,000 tons). In 1991, vehicle tonnage had been just 4,000 tons, and they had accommodated just 2,000 tons of freight.

Table 3.4 indicates the month-by-month cargo flows accommodated at Masbate Port in 1993. The total shown in the table excludes approximately 24,000 tons of cargo that was handled at

anchorage. Until 1994, there was no significant level of road vehicle movement through the port, due to the absence of RORO ferries. Outbound copra from the port averaged more than 40,000 tons per annum during 1992-1993, including an average of 7,500 tons of direct exports per annum. Principal inflows at the port, over the same two-year period, included 63,000 tons of bottled beverages, 44,000 tons of petroleum products, 27,000 tons of cement, and 20,000 tons of rice.

At some of the other northern island ports, the advent of RORO ferry services at Virac Port created a sharp statistical rise in "cargo" volumes, although the actual growth of trade was modest. Table 3.5 shows that Virac had a 1993 throughput level of 68,000 tons of cargo handled at berth, and another 8,000 tons was handled at the port's anchorages. In 1992, the two-direction total of road vehicle passing through Virac was approximately 1,700 tons, but this traffic rose to more than 17,000 tons the following year. This rapid growth occurred despite the fact that the RORO ferry serving the port, in 1993, was incapable of accommodating large vehicles. The principal commodity inflow at Virac, during 1992-1993, was cement, with approximately 26,000 tons being moved to the port over the two-year period. The Catanduanes port of San Andres accommodates mainly passengers, and had an average annual cargo throughput of only slightly more than 7,000 tons during 1991-1993.

Table 3.6 shows the cargo accommodated at the five principal ports of the Bicol Peninsula. The RORO ferry port of Matnog accommodates very little "cargo" other than road vehicles. Much of the cargo traffic accommodated at Tabaco and Bulan is related to the ferry operations between those ports and the islands of Catanduanes and Masbate, respectively. Tabaco also accommodates large inflows of cement shipped from Mindanao public and private wharves.

Cargo Service Standards

Mindoro

Grains

Both provinces of Mindoro are areas that produce large surpluses of rice and palay. Grain shippers based in Oriental Mindoro are mainly private traders who, in 1993, were averaging shipping about 30-50 sacks (1.5-2.5 mt) to Manila about eight times a month. They were utilizing the RORO services, which allow fast unloading and loading of cargoes, and they had no complaints as regards the adequacy of shipping services, indicating that the RORO services were generally adequate to serve the large volume of cargo jeeps and trucks from Calapan Port. They indicated that RORO service had tremendously contributed to rice trading activities in

Oriental Mindoro, and had induced an influx of traders from Batangas. Further, they considered the RORO rates charged for cargo vehicles to be reasonable.

During peak months, however, some grain shippers were encountering a problem of limited vessel capacity for cargo jeeps because of the large numbers of cargo trucks on the Batangas-Calapan route.

The NFA in Batangas indicated that they were shipping rice only in small consignments from Oriental Mindoro to their NFA warehouse in Batangas, due to strong competition from private traders who were shipping in truckloads. From Occidental Mindoro, however, and particularly from San Jose and Sablayan, NFA was shipping larger volumes of rice to Batangas and Manila. NFA considered these areas to constitute the rice granary of Mindoro Island. There had reportedly been an increase in rice production in Occidental Mindoro due to the expansion in land area for rice cultivation, and due, as well, to the use of high-yielding and fancy palay varieties.

In Occidental Mindoro, the private grain shippers who were shipping through the port of Abra de Ilog indicated that they were being inconvenienced by the early departure of the Viva Shipping Lines vessel on its second trip in the afternoon; its scheduled departure time was 1800 hours but the vessel was usually leaving at 1730 hours. Hence, shippers and passengers had to wait for the next day's first vessel trip from Batangas. In the view of the LSRS, however, this complaint is a relatively minor one, and it would behoove shippers to just accept the early departures as normal, and plan for them.

The NFA at Mamburao was shipping mostly palay through the port of Tayamaan in Mamburao, Occidental Mindoro, to Batangas for milling, because of the inadequate milling capacity in Occidental Mindoro. Palay shipments were being loaded on chartered conventional cargo vessels. However, these vessels had to wait for high tide before they could load their palay shipments of 300 to 500 bags (9-15 mt; there is one cavan, or 50 kgs. per bag) through this port. In peak months they were having difficulty chartering cargo vessels for their palay and rice shipments because of the low freight rates that NFA was offering.

NFA was not utilizing the RORO vessel that was calling at the port of Abra de Ilog, since they considered the short loading time of only 30 minutes to be inadequate for the loading/unloading of significant volumes of breakbulk cargo (first trip arrival in Abra de Ilog was 0900 hours and departure at 0930 hours and second trip arrival was 1700 hours with departure at 1730 hours). NFA was utilizing, instead, the conventional passenger/cargo vessel of Viva Shipping Lines that called at the port of Sablayan for its rice shipments of 500-1,000 sacks per shipment, during the months of

October to June.

There were often rice shipments of the NFA San Jose to other destination ports, such as those of Marinduque and Romblon, via Batangas, since there is no direct liner service between Mindoro and these islands and volumes of rice were not sufficient to make chartering of tramper service between Occidental Mindoro and these islands economic. In the ports of these islands, NFA had problems with slow handling, with the use of batels or barges, and with pilferage and spillage, which resulted in losses of weight from their warehouse to the point of destination. NFA San Jose indicated that it was experiencing problems of lack of trucking services in Romblon, Marinduque, and Coron, Palawan.

NFA in San Jose was being served by Viva Shipping Lines which provided a limited allocation of space, sufficient for only 1,000 bags (50 mt), on its RORO vessel calling the port of San Jose. The breakbulk cargo limitation was necessary because of the limited unloading and loading time of one hour at the port of Batangas. There were times when portions of NFA's breakbulk shipments of rice were still on board the vessel on its return trip to San Jose. NFA Batangas indicated that only about 20 percent of their shipping requirements could be accommodated by scheduled RORO and passenger/cargo vessels serving the different ports of Mindoro island. NFA has the option, of course, of discontinuing shipment of their rice as breakbulk cargo, by hiring trucks to carry it to Batangas, but NFA had, in 1993, not yet opted to do this.

Large rice traders based in San Jose, Occidental Mindoro, were regularly shipping rice to Manila either on their own vessels or in chartered cargo vessels. Other traders shipped about 6,000 bags (300 mt) on ten-wheel trucks (which each carry 500 bags, or 25 mt) to Batangas aboard a RORO vessel. Still others were shipping their rice to Samar and other islands or provinces. NFA had had problems with pilferage in unloading their rice shipments at the Manila North Harbor (Piers 8 and 14), resulting in weight losses which averaged about 1 kilo per bag.

As regards corn shipments, there were a few movements from Calapan, Oriental Mindoro, and these were being loaded on cargo jeeps bound for Batangas, intended for the poultry industry there. NFA Mamburao was not procuring corn since the corn requirements of NFA Batangas were being sourced primarily from the NFA warehouses in Cebu, Negros Oriental and Northern Mindanao.

Fruits and Vegetables

Large quantities of bananas and citrus, which are the major fruits grown in several municipalities of Oriental Mindoro, are transported on cargo jeeps to Metro Manila and neighboring provinces. During a period of several years prior to 1993, a lot of Mindoro farms planted in coffee had been converted to planting

citrus and bananas.

Due to lack of storage facilities, the farmers were forced either to sell their produce immediately to traders or to bring their produce themselves to Manila. Both producers and traders credited RORO ferry services with helping to create a proliferation of Luzon-based traders on the island of Mindoro, but the same services had also made it easily possible for Mindoro producers to move their own produce to Manila. Price differentials between Mindoro and Manila were sufficiently wide in 1993 (and earlier years) to make trading activities profitable in regard to a number of fruits and vegetables including bananas, watermelon, jackfruit, calamansi, and rootcrops. The price differentials were sufficient to cover the costs of delivery to Manila, and, according to some producers, were sometimes sufficiently wide to make it worthwhile for producers to arrange for their own transport services. When interviewed by the LSRS, the Luzon-based traders operating in Mindoro noted the adequacy and efficiency of the RORO shipping services in the Batangas-Calapan route.

A few traders indicated the need to look after the security of their fruit and vegetable shipments while on board the RORO vessels on the Batangas-Calapan route, and said that they felt compelled to stay in the cargo jeeps for the duration of the trip.

There were shippers or traders who were shipping other agricultural products, such as peanuts, mango, watermelon, watermelon seeds, mango and onions from Sablayan and Mamburao, Occidental Mindoro, in small consignments (one jeepload) bound for Manila. These shippers noted the reliability, frequency and efficiency of RORO service in the Batangas-Abra de Ilog route and they indicated that they preferred to utilize the RORO vessel calling daily at the port of Abra de Ilog rather than the one calling at the port of San Jose, which called only twice a week.

Fishery Products

Fishery products that originated from Mindoro were being shipped mainly by fish traders who were directly buying the fish catch from fishermen at the fish landing areas in the different municipalities of Oriental Mindoro. Average consignment size and frequency were about 1 ton twice a week. The buying price of fish was P10 to P20 per kilo and the fish were being sold to Manila buyers at P40 per kilo. The official freight fork tariff for fish, which is a Class A commodity, was P96.50-124.85 per ton, Calapan to Batangas, as shown in Table 3.7.

Fishermen and/or fish traders from the port of Coron, Palawan were bringing their fish catch to the municipality of Bulalacao, Oriental Mindoro in small fishing boats. These fish were then bought by Mindoro-based fish traders who were regularly shipping to Manila. Their fishery product shipments were being transported by

TABLE 3.7

SCHEDULE OF NORTHERN ISLAND ROUTE CARGO SHIPPING RATES

(Effective January 1993)

PORT LINKS		NM	(PESOS / FREIGHT TON)							
			CLASS A		CLASS B		CLASS C		BASIC CLASS	
			MIN.	MAX.	MIN.	MAX.	MIN.	MAX.	MIN.	MAX.
BATAN	ODIONGAN	66	122.40	158.40	97.94	126.75	79.61	103.03	70.77	91.58
CAGAYAN	MASBATE	264	219.32	283.83	175.40	227.00	142.76	184.74	126.89	164.19
CAGAYAN	ODIONGAN	338	240.06	310.66	191.99	248.46	156.26	202.21	138.89	179.72
CALBAYOG	MASBATE	66	122.40	158.40	97.94	126.75	79.61	103.03	70.77	91.58
CATBALOGAN	MASBATE	88	135.98	175.97	108.80	140.81	88.46	114.47	78.63	101.75
CEBU	MASBATE	148	152.51	197.36	121.98	157.85	99.24	128.43	88.21	114.15
CEBU	ODIONGAN	228	198.59	256.99	158.82	205.54	129.25	167.26	114.89	148.66
CORON	MANILA	192	177.85	230.16	142.24	184.08	115.75	149.79	102.88	133.13
CORON	PTO. PRINCESA	190	176.70	228.67	141.32	182.89	115.00	148.82	102.22	132.27
DUMAGUETE	MASBATE	253	212.99	275.63	170.34	220.45	138.63	179.40	123.22	159.45
ESTANCIA	ODIONGAN	127	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
ILIGAN	MASBATE	282	229.69	297.24	183.70	237.73	149.51	193.47	132.89	171.96
ILIGAN	ODIONGAN	320	240.06	310.66	191.99	248.46	156.26	202.21	138.89	179.72
ILOILO	ODIONGAN	172	166.33	215.25	133.03	172.16	108.25	140.08	96.22	124.50
ILOILO	PTO. PRINCESA	242	206.65	267.43	165.27	213.89	134.50	174.06	119.55	154.70
ILOILO	ROMBLON	167	163.45	211.52	130.73	169.18	106.37	137.65	94.55	122.35
MAASIN	MASBATE	170	165.18	213.76	132.11	170.97	107.50	139.11	95.55	123.64
MANILA	MASBATE	260	217.02	280.84	173.56	224.62	141.26	182.79	125.55	162.47
MANILA	ODIONGAN	180	170.94	221.21	136.71	176.93	111.25	143.96	98.88	127.96
MANILA	ROMBLON	184	173.24	224.19	138.56	179.31	112.75	145.90	100.22	129.68
MANILA	SABLAYAN	136	145.59	188.41	116.45	150.70	94.74	122.61	84.21	108.97
MANILA	SAN JOSE	277	226.81	293.52	181.39	234.75	147.63	191.05	131.22	169.80
MASBATE	ODIONGAN	115	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
NEW WASHINGTON	ROMBLON	70	124.87	161.59	99.92	129.31	81.22	105.11	72.20	93.43
SAN JOSE	BALANACAN	104	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
DALAHICAN	BALANACAN	28	98.94	128.04	79.18	102.47	64.34	83.27	57.20	74.01
BATANGAS	SAN AGUSTIN	105	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
SAN AGUSTIN	ROMBLON	8	86.60	112.07	69.31	89.69	56.30	72.86	50.05	64.77
ROMBLON	AMBULONG	20	94.01	121.65	75.23	97.36	61.13	79.11	54.34	70.32
BATANGAS	ROMBLON	107	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
BATANGAS	AMBULONG	119	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
BATANGAS	SAN FERNANDO	133	143.87	186.18	115.07	148.91	93.62	121.15	83.21	107.68
BATANGAS	CAJIDIOCAN	145	150.78	195.12	120.59	156.07	98.12	126.97	87.21	112.86
SAN AGUSTIN	AMBULONG	23	95.86	124.05	76.71	99.28	62.33	80.67	55.41	71.70
SAN AGUSTIN	SAN FERNANDO	32	101.41	131.24	81.16	105.03	65.95	85.35	58.62	75.86
SAN AGUSTIN	CAJIDIOCAN	51	113.14	146.42	90.54	117.17	73.59	95.23	65.41	84.65
ROMBLON	SAN FERNANDO	31	100.80	130.44	80.66	104.39	65.55	84.83	58.27	75.40
ROMBLON	CAJIDIOCAN	43	108.20	140.03	86.59	112.06	70.37	91.07	62.55	80.95
ODIONGAN	MALAY	30	100.18	129.64	80.17	103.75	65.15	84.31	57.91	74.94
PTO. PRINCESA	SAN JOSE	223	195.71	253.26	156.52	202.56	127.38	164.84	113.22	146.51
ROMBLON	ROXAS	68	123.64	160.00	98.93	128.03	80.42	104.07	71.49	84.65
DUMAGUETE	MASBATE	165	162.30	210.03	129.81	167.99	105.62	136.68	93.88	121.48
MALAY	PTO. PRINCESA	240	205.50	265.94	164.35	212.70	133.75	173.09	118.89	153.84
MASBATE	TAGBILARAN	193	178.43	230.90	142.70	184.68	116.12	150.27	103.22	133.56
ODIONGAN	PTO. PRINCESA	275	225.66	292.02	180.47	233.56	146.88	190.08	130.56	168.94
ODIONGAN	ZAMBOANGA	345	240.06	310.66	191.99	248.46	156.26	202.21	138.89	179.72
BATANGAS	CALAPAN	24	96.47	124.85	77.21	99.92	62.73	81.19	55.77	72.17
BATANGAS	ROXAS	87	135.36	175.17	108.31	140.17	88.05	113.95	78.28	101.29
BATANGAS	ODIONGAN	102	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
BATANGAS	SAN JOSE	141	148.47	192.14	118.75	153.68	96.62	125.03	85.88	111.13
BATANGAS	DALAHICAN	51	113.14	146.42	90.54	117.17	73.59	95.23	65.41	84.65
BATANGAS	BALANACAN	55	115.61	149.61	92.51	119.72	75.19	97.31	66.84	86.50
CALAPAN	ROXAS	65	121.78	157.60	97.45	126.11	79.12	102.51	70.42	91.12
CALAPAN	ODIONGAN	79	130.43	168.78	104.36	135.06	84.84	109.79	75.42	97.59
CALAPAN	SAN JOSE	117	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
CALAPAN	DALAHICAN	34	102.65	132.84	82.14	106.30	66.75	86.39	59.34	76.79
CALAPAN	BALANACAN	37	104.50	135.23	83.63	108.22	67.96	87.95	60.41	78.18
ROXAS	ODIONGAN	29	99.56	128.84	79.68	103.11	64.74	83.79	57.55	74.48
ROXAS	SAN JOSE	45	109.44	141.62	87.58	113.33	71.17	92.11	63.27	81.87
ROXAS	DALAHICAN	129	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
ROXAS	BALANACAN	107	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30
ODIONGAN	SAN JOSE	64	121.17	156.80	96.96	125.47	78.81	101.99	70.06	90.66
ODIONGAN	DALAHICAN	92	138.45	179.17	110.78	143.36	90.06	116.55	80.06	103.60
ODIONGAN	BALANACAN	64	121.17	156.80	96.96	125.47	78.81	101.99	70.06	90.66
SAN JOSE	DALAHICAN	129	143.39	185.56	114.73	148.47	93.28	120.71	82.92	107.30

SOURCE: MARINA (Maritime Industry Authority).

land to Calapan port (4-hour trip), shipped on a RORO vessel to Batangas (2.5 hours) and finally transported to Manila by road (2-hour trip).

There were a few shippers of fishery products who indicated that the cargo jeeps loaded with fishery products were being given low preference for space allocation inside the RORO vessel by Viva Shipping Lines mainly due to the strong odor of fishery product shipments. Nevertheless, whenever they missed one sailing, they were usually able to obtain space for accommodation of their cargoes in the next vessel, considering that there were four daily RORO vessel trips to Batangas. The Viva RORO vessel on the route had a 60-jeepney capacity. The transport hire for a cargo jeepney loaded with 5 tons of fishery products was around P5,000 per trip, and was charged a rolling freight rate of P550 by the vessel operator. As per MARINA guidelines, a pick-up or a cargo jeepney should be charged P500 and hence, the charge by the operator was higher by P50 (see Table 3.8). On the other hand, the official rates for jeepneys were intended for the standard-sized type jeepney, and not for the elongated version of this vehicle type.

The sea freight of fishery products, at P110 per ton, constituted around 10 percent of the total transport cost of P5,628, including arrastre of P78.10 per cargo jeepney, for a 5-ton load of fishery products from Calapan to Manila. Hence shippers considered this buy-and-sell of fishery products a profitable business, buying fish in Mindoro at P20 per kilo and selling in Manila markets at P40-50 per kilo. The RORO shipping service enabled these shippers of fishery products to derive savings from elimination of handling at ports of origin and destination as well as time savings (reduction in spoilage) in transporting these products. In 1993, the shippers were seldom experiencing spoilage, even when they were shut out of one voyage and had to await the next one; the limited spoilage was mainly due to the adequacy of ice, the short waiting time of 1 hour, and short travel time of 2.5 hours.

Shippers of fishery products in Calapan indicated that they had not encountered delays in arrival and departure of vessels. A fishpond operator and shipper based in the municipality of Magsaysay, Occidental Mindoro, was selling his fish directly to traders or to the public market in Manila at P50 per kilo.

Other Products

Other products which were being shipped out from Occidental Mindoro included green stone (Mamburao jade) and pebbles from the towns of Paluan and Abra de Ilog. Shippers of these products were utilizing the RORO vessel calling at the port of Abra de Ilog. Shippers of salt, garlic and tobacco, who were shipping via the port of San Jose, indicated that they had had a problem (a few cases) of theft and loss of personal property on board the RORO

vessel of Viva Shipping Lines, and that the operator never acted upon their claims in such cases.

Further, shippers of general cargo in Occidental Mindoro indicated that Viva Shipping Lines was not issuing bills of lading, but only freight receipts. Complaints on this matter had been filed with the Sangguniang Pambayan to compel Viva Shipping Lines to issue bills of lading but nothing had yet happened. A RORO vehicle transport rate of P6,240 for a six-wheel truck with cargo was considered by the shippers to be expensive. Table 3.8 presents MARINA's approved rates for the accommodation of vehicles aboard RORO ferries serving routes between Batangas and Mindoro.

Shippers of copra and handicrafts from Puerto Galera, Oriental Mindoro, destined to Manila indicated that RORO shipping services in the Batangas-Puerto Galera route were adequate, considering the low volume of RORO traffic in the route even during peak season. The RORO freight rates for vehicles were the same as the RORO rates in the Batangas-Calapan route, even though the Batangas-Puerto Galera route is shorter in distance (17 n.m.) and the voyage required less travel time.

Shippers of dry goods preferred the conventional passenger/cargo vessels of AC Shipping Lines, partly because it was charging shippers lower freight rates for breakbulk cargo, but also because the vessel conveniently docked at the municipal port inside the town. The Viva Shipping Lines vessel was docking at the public port outside the town since its RORO vessel could not dock at the port in the town proper (because of the narrow entrance between the offshore islands at Puerto Galera). Shippers were having to hire tricycles to bring goods to the town proper, with tricycle charges of P10 per passenger or P20 if loaded with cargo. A shipper who was at the same time a vehicle owner found it easier to transport his goods by utilizing the Viva RORO service than to ship by the conventional cargo/passenger vessel of AC Shipping, which required shipping cargo as breakbulk.

Marinduque

The island of Marinduque is a rice deficit area and, in 1993, it was obtaining its supplemental rice supply from the municipalities of Pinamalayan, Oriental Mindoro, and San Jose, Occidental Mindoro. Rice consignments were being loaded on conventional cargo vessels chartered by NFA Batangas or San Jose or by private traders. Chartering was necessary because of the absence of direct liner services between Mindoro and Marinduque.

Vegetables

Shippers, who were shipping jeeploads of assorted vegetables from the port of Sta.Cruz to Dalahican Port at Lucena City,

TABLE 3.8

RORO VEHICLE TRANSPORT RATES, 1993

TYPE OF VEHICLES	Batangas-Calapan (24 n.m.)		Batangas-Puerto Galera (17 n.m.)		Batangas-San Jose (141 n.m.)		Batangas-Abra de Hog (25.37 n.m.)			
	MARINA		MARINA		ACTUAL		MARINA			
Automobiles	P	380	P	267	P	370	P	2,218	P	400
Land Cruiser		430		303		410		2,511		450
Trooper		430		303		410		2,511		450
Land Rover		430		303		410		2,511		450
Mini-Ace		430		303		410		2,511		450
Hi-Ace		500		353		480		2,929		530
Van		570		404		550		3,348		600
Coaster		970		686		940		5,692		1,020
Tamaraw / Fiera		360		252		340		2,092		380
Pick - up		500		353		480		2,929		530
Owner Type Jeep		300		244		340		2,025		360
Passenger Jeep (short)		300		244		340		2,025		360
6-Wheel Truck (Mini)		570		404		550		3,348		600
6-Wheel Truck (Reg.)		800		575		n.a.		4,771		860
6-Wheel Truck (Long Body)		900		646		880		5,357		960
6-Wheel Dump Truck		960		681		930		5,650		1,020
10-Wheel Truck		1,920		1,362		1,860		11,299		2,030
10-Wheel Dump Truck		1,280		908		1,240		7,533		1,360
14-Wheel Trailer		2,560		1,816		2,480		15,066		2,710
18-Wheel Trailer		3,700		2,624		3,580		21,762		3,920
Passenger Bus (Big)		1,280		908		1,240		7,533		1,360
Passenger Bus (Mini)		1,050		747		1,020		6,194		1,110

Source : Domestic Shipping Office, MARINA and Survey

indicated that shipping services, consisting of one RORO vessel and a passenger/cargo vessel, were adequate in terms of reliability and efficiency. The RORO vessel, however, generally could accommodate only two cargo jeepneys per trip since half of the area intended for vehicles was being occupied by passengers. The freight charge for breakbulk cargoes was P42 for 50 kilograms, or shipment aboard a vehicle was bearing a RORO vehicle transport rate of P500 for a cargo jeepney with a load of 5 tons. The shipper, therefore, found it cheaper to transport his cargoes already loaded on a cargo jeepney, in which case he paid only P100 per ton (P0.10 per kilo), whereas for breakbulk loading he was paying sea freight of P840 per ton (P0.84 per kilo). This comparison, of course, must also take into account the time value of the vehicle loaded with cargo on a RORO crossing and the cargo-handling and storage cost differentials between the breakbulk and loaded vehicle shipment options.

In 1993, the municipal port of Gasan in Marinduque was the unloading port of rice and vegetable shipments from Pinamalayan (about 100 sacks per week). Freight cost was P5 per sack of 50 kilograms, or P0.10 per kilo, and was in line with MARINA's rate for liner services. Romblon Province was the destination of most of the rice shipments in consignment sizes of 100-500 sacks originating mainly from Mindoro.

Fishery Products

Shippers of fishery products in Balanacan indicated that, prior to the operation of a RORO vessel in 1987, in the Balanacan-Dalahican route, they shipped bangus fry and meat products by air to Manila. By 1993, they were shipping these products on the RORO vessel to Dalahican and transporting their shipments by road to Manila. This method of shipment had reduced their dependence on the limited air transport services, and they were able to ship these perishable products more frequently.

Other Products

Shippers of copra, who were utilizing the Sta.Cruz-Dalahican route, shipped in small consignments of 40-50 sacks on the RORO vessel serving the route. Shippers of such small consignments were limited to the ferry transport option since the owner/operators of batels, the alternative transport means, normally only accepted consignments of 100 sacks or more. They liked to have a full load of 400 sacks per voyage. Each shipper was being charged around P9 for 50 kilos (P0.18 per kilo), when shipping in small breakbulk consignments aboard the ferry.

In Balanacan, Marinduque, the shippers of handicrafts and other softwood products (e.g., products of members of the Softwood Producers Association and the Marinduque Handicraft Producers Association) encountered frequent shut-outs due to lack of vessel capacity during peak months. The shipping operators were giving

priority to perishable commodities such as bananas (for catsup processing) and the shippers of handicrafts then had to transport their cargo by air in order to meet their export shipment schedules in Manila. Philippine Airlines was accommodating about 200 kilos of handicrafts (baskets, hats, novelty items) from Gasan airport every week to Manila.

Shipping services, consisting of three motorized bancas, were considered by shippers to be adequate in the Cotta (Lucena)-Cawit (Boac) route; these services were mainly serving the fifteen commercial copra traders.

Catanduanes

The island province of Catanduanes is linked to the Bicol region of the Luzon mainland by the ports of Virac and San Andres. In 1993, the Tabaco-Virac route was being served mainly by two ferry vessels, one of which was a RORO vessel that operated one round-trip daily. The RORO ferry carried both passengers and cargoes to and from Virac. In addition, there were six motorized bancas that were plying the route. One vessel was serving the Tabaco-San Andres route, transporting abaca, copra, cement and fishery products.

The majority of the large-scale abaca traders were shipping their cargo through privately-owned motorized bancas (of about 30 GRT), since the regular RORO vessel was encountering problems with engine malfunctioning at sea, and had a limited capacity for only two or three cargo jeeps or pick-ups. Hence, shippers who were interviewed by the LSRS indicated the need for an additional vessel, larger in capacity, that would be able to accommodate both heavy and light vehicles.

Shut-outs of shipments were being experienced at Virac Port once or twice a month, even during the lean season, and were caused mainly by the alleged recalcitrance of arrastre laborers, who were said to be refusing to unload cargoes whenever the consignees' trucks were not yet available. Further, according to shippers, the arrastre operator was not practicing a "first-come, first-served" policy. Hence, shippers often had to wait for one day for their cargo to be loaded.

Shippers of fishery products at Virac port were experiencing shut-outs by shipping lines, during peak months, and were having to transport their shipments by air to avoid spoilage. There were also fish traders who shipped to Sorsogon on motorized bancas.

Shippers at Virac also were experiencing cases of cargoes remaining in the vessel for a round-trip, and then being unloaded when the vessel returned to the destination port the next day. This was due to the short unloading and loading time of the RORO

vessel, i.e., 2 hours.

Small abaca traders were having to request the large traders, who owned or chartered cargo vessels, to accommodate their shipments, considering that abaca fiber deteriorates in quality after being stocked for a week. The large traders indicated that they willingly provided space not required for their own cargo, and charged these small abaca shippers the stipulated shipping rates for their shipments.

In Tabaco, shippers of dry goods, electrical appliances, rice, cement and copra were experiencing shut-outs during peak season due to lack of space in the vessel; some shippers attributed this difficulty to the fact that the Tabaco-Virac route was monopolized by one shipping operator with two vessels (one RORO vessel and one conventional passenger/cargo vessel). They indicated other problems of: slow vessel turnaround, due to engine trouble and poor maintenance of old vessels; cargoes not being insured against theft or damage; and pilferage losses of sugar and palay shipments due to poor handling. The vessel crew members were characterized by shippers interviewed by LSRS as being rude, arrogant and unprofessional to both shippers and passengers. It was maintained by shippers that there was a need for newer and larger vessels to be operated by another shipping line to accommodate cargo trucks, jeeps and bulk shipments.

Regular shippers of dry goods and electronic equipment and other manufactured products were shipping one or two truckloads (of 120 cartons weighing 15 kilos each) and the freight rate was P10-P15 per carton, or up to P1 per kilo. Dry goods and electronic equipment are classified as Class A commodities, bearing relatively high freight charges, as compared with freight charges for copra or other agricultural products. Nevertheless, the rates being charged for these manufactured commodities on the Tabaco-Virac route appear to have been quite high, as MARINA's approved rate for Class A cargo, for a voyage distance of 37 n.m., was P135 per ton or about P0.14 per kilo.

Romblon

Fruits

Shippers of fruits based in Romblon were shipping about 20-30 baskets (50 kgs each) of starapples to Manila and 50-60 baskets of mangoes bound for Batangas twice a month during the harvest season. The shippers had to pay various transfer, handling and transport costs considering that they normally were shipping breakbulk, and cargoes were not being loaded on any cargo vehicle. The sea freight constituted about 23 percent of the total transport and handling cost of P1,950 per ton. Despite these transport and incidental costs, shippers were still able to make a large profit,

considering that they could sell the fruits in Manila at prices that were up to ten times the buying prices in Romblon.

Fishery Products

The fish traders based on the island of Tablas were shipping 30 styrofoam boxes (each weighing 50 kilos) to Batangas and Manila per week. Fishery products in styrofoam boxes constitute breakbulk cargoes, and were being moved to the port on hired cargo jeeps, and were then being stowed inside vessels by stevedores. The sea freight charge for fishery products from Odiongan, Romblon to Batangas was three times higher than the MARINA stipulated rate of P0.18 per kilo. Upon cargo arrival at Batangas Port, the shipper had to hire a porter to bring the shipment out of the port's premises for loading on hired cargo jeepneys, which then transported the cargoes from Batangas to Manila.

Based on the costs of handling and transport, amounting to P2,362 per trip (30 boxes), fish traders were making a profit of P7,000 per trip whenever they sold the cargo in Batangas, or even more than this amount whenever they sold in Manila markets. Some shippers complained that they were being obliged to give to the cook of the vessel some 5 kilos of assorted fish every time they shipped.

There were shippers of fishery products who were experiencing shut-outs particularly when the vessel was full or overloaded, and they were then forced to sell the fish in neighboring towns. When their cargoes were accommodated in the vessel, they encountered the problem of lack of ice to enable them to maintain the quality of their shipment.

Most shippers of fish preferred to ship to Manila via Batangas since they could buy ice in Batangas before proceeding to Manila. In past years, they had shipped directly to Manila from Odiongan, Romblon; the trip to Manila North Harbor took 12-14 hours, and the lack of ice resulted in substantial spoilage of their fishery product shipments. Shippers suggested that shipping operators should have ice to make available to shippers and that the freight rates should be lowered.

There was a passenger/cargo vessel (MV Zamboanga) that once called at the port of Odiongan bound for Manila, but this service had continued for only about one month. Odiongan, being an intermediate port-of-call, was given low priority by the operator, who preferred the accommodation of through traffic. During its brief period of "serving" Odiongan, the vessel was almost always full when arriving at Odiongan, and was therefore unable to accommodate much of Romblon's demand for passenger and cargo shipping services.

Livestock

Hog shippers were transporting their hogs from Odiongan to Manila about four times a month (60-80 heads per trip). The shippers hired a cargo jeepney to bring the hogs to Odiongan port and the hogs were then brought out of the cargo jeepney to the vessel by arrastre laborers at P25 per head (higher than the sea freight). The hog shipments were normally given last priority in loading. The freight rate per hog was P23.45. They were then unloaded at Batangas Port and transferred to a jeepney hired in Batangas bound for Manila. Shippers were encountering problems of shrinkage loss per hog of around 3 kilos in each shipment, or an equivalent cost of P120 per hog.

The shippers still were making a profit of around P24,000 after deducting the cost of transport, handling and incidental costs per hog. This was made possible because of the low buying price per kilo^v of hog (live) and the relatively high selling price in Manila markets.

According to Tablas shippers, the vessel crew members of the RORO vessel serving the Odiongan-Batangas route were not properly stowing the cargoes inside the vessel, and hog shipments were being mixed with fruits, vegetables or with other cargoes, without consideration of the potential damage to these commodities.

Other Products

Shippers of marble from Romblon indicated the need for an increase in frequency of trips to Romblon, but found no problem in regard to security of cargo on board the RORO vessel. A copra shipper, who was shipping copra to Manila on a RORO liner vessel weekly, indicated that the service was adequate, although he proposed that arrastre and stevedoring charges be reduced.

Shippers in Romblon indicated that there were two passenger/cargo vessels that used to call at the port of Looc, a neighboring town of Odiongan. These vessels had stopped calling at the port of Looc and were operating, in 1993 in the Batangas-Calapan and Batangas-Palawan routes.

Masbate

In 1993, the port of Masbate was being served by a RORO vessel, the MV Cebu Princess, which plied the Manila-Masbate-Cebu route once a week (every Saturday), and by the MV Cebu City of William Lines, which plied the Manila-Masbate-Manila route also once a week (every Sunday).

Fishery Products

There were seven commercial dealers of fresh fish in Masbate who were shipping fishery products to Manila, Legaspi City, Tabaco, Naga City, Sorsogon and Cebu. Shippers of shellfish, i.e., prawns, giant crabs, shrimps, were shipping via Bulan Port to Manila.

The 1993 freight being charged for fish (classified as Class A commodity) by the two shipping lines operating in the Masbate-Manila route was almost ten times higher than the MARINA stipulated rate on a per-kilo basis. Between the two shipping lines which operate in the route, the sea freight charged by William Lines was 20 percent higher than the rate charged by Sulpicio Lines.

When scheduled vessels failed to call at the port of Masbate (once in three months during the dry season and two times a month during the rainy season), shippers had to transport their cargoes on motorboat to the port of Bulan and then transport them by land via South Road to Manila. The sea freight for fish per box in the Masbate-Bulan route approximated that of the sea freight for fish per box in the Masbate-Manila route. The shippers therefore were incurring incremental transport costs when shipping to Manila via the port of Bulan.

The arrastre and stevedoring rates for fish differed by type of packaging and the size of one unit of shipment, and the charges were lower by around 10 percent for palletized cargo.

Shippers were able to reap profits, despite high shipping charges, due to the wide price differential between the Masbate buying price of fish and the selling prices in Manila, which more than enabled them to cover their total transport and handling cost.

Shippers of shellfish products were encountering problems with spoilage losses comprising 5 percent of total volume, whenever vessels were delayed in arrival for about five hours, which was occurring, on the average, about once a month (due to delays in the loading of cargoes in Manila North Harbor). Shippers then had to ship via Bulan Port, and from there by land to Manila. In some cases, they were shipping via air, which cost three times the sea freight cost for fish.

The largest shipper of giant crabs was shipping out 250 kilos per week and he paid 33 percent more whenever he shipped his shipment by air than when he shipped by sea. The sea freight costs comprised 6-10 percent of his total revenues and he was still able to earn a large profit from the buying-and-selling of marine products.

Cattle

In 1991, the average number of cattle shipped to Manila with

a final destination of Central Luzon was 620 head per month (155 head per week). These animals were being shipped as loose cargo, since there were no cattle vans available. The animals were being loaded on one side of the ship, where an improvised cage made of bamboo was set up near the container vans. The poles of bamboo were tied horizontally to the railings to prevent the animals from jumping overboard. There were shut-outs experienced by shippers of cattle due to limited vessel capacity. During January-July 1993, the average number of cattle shipped to Manila was 120 head per week, which was lower than the 1991 average.

Copra

The 1993 sea freight cost for copra in the Masbate-Manila route was double the stipulated freight rate of MARINA. Copra was also being shipped via Bulan Port on motorized bancas. The sea freight cost charged by the banca operators was 5 times higher than the MARINA rate (however, MARINA rates were not meant to apply to tramper services, such as those being provided by these banca operators).

Copra traders noted that only one trader was able to ship copra to Cebu via Sulpicio Lines since the shipper was also the shipping agent of that shipping line. Likewise, only one copra trader was using William Lines to ship to Manila, and this trader was also the shipping agent of William Lines in Masbate. According to copra shippers who shipped to Manila, they experienced shut-outs with William Lines, but they were able to ship via Sulpicio Lines weekly.

Charcoal

The only shipper of charcoal from Masbate to Cebu was experiencing shut-outs twice a month, brought about by large shipments of copra by the copra trader who was at the same time a shipping agent of Sulpicio Lines. The freight cost for charcoal from Masbate to Cebu was almost double the MARINA stipulated rate for a Class C commodity.

Handicrafts

A shipper of assorted handicrafts to Cebu, mostly hats, complained about the lack of "taremas", or protective sheets, to cover cargoes from intense heat and rains. Whenever cargoes were unloaded from the vessel bound for Cebu, the taremas were transferred to other commodities, e.g., sugar, flour and dry goods. The lack of taremas, particularly during the rainy season, caused damage to their shipments of handicrafts which resulted in rejection of the shipments.

The sea freight cost for handicrafts in the Masbate-Cebu route was three times higher than the MARINA stipulated rate per kilo of

handicrafts (Class A).

Consumer Goods

Shippers of consumer goods considered breakage and spoilage losses to be minimal, but indicated that such losses as did occur would be further minimized if all their cargoes could be shipped in containers. There was a clamor for additional container vans from shippers of dry goods, grocery items, bottled cargo, and other general cargo, to minimize spoilage and breakage losses.

PORT OF BATANGAS



Disembarking passengers intermingling with cargo jeepneys upon vessel arrival at the port.



Typical cargo jeepney carrying heavy loads of agricultural products from the island of Mindoro.

4. PASSENGER SERVICES EVALUATION

Introduction

The LSRS conducted passenger surveys in May and June, 1993, at the ports of Batangas, Dalahican (Lucena City), and Tabaco, and the liner vessel serving the Manila-Masbate-Cebu route was surveyed at the MNH. A vessel serving the Poctoy (Odiongan)-Batangas route was surveyed both at Batangas and during the voyage from Poctoy. During 30 July-1 August, 1993, surveys were also conducted at the port of Masbate. The detailed results of these surveys are presented in Annex B of this volume. Chapter 4 presents only the principal findings for each of the 13 routes which were surveyed.

The following section of this chapter presents a brief review of the 1991 and 1992 passenger traffic on a number of routes connecting the port of Batangas to ports of Mindoro Island and ports of Romblon Province, and of the 1993 passenger volumes at ports of the northern islands and of the Bicol Peninsula. Passenger service standards are then discussed, as these were identified through the surveys conducted by the LSRS. A final section of the chapter briefly reviews passenger fares which were being charged for northern island ferry and liner shipping services in mid-1993.

Passenger Traffic

Mindoro

Five ports of Mindoro serve significant volumes of passenger traffic, but the volumes accommodated at the port of Calapan are much higher than the combined totals of the other four ports together. Tables 4.1 and 4.2 indicate, respectively, the passenger volumes between Batangas and the various Mindoro ports in 1991 and in 1992. Although two years constitute too short a period to discern a trend, traffic between Batangas and Calapan declined significantly from 1991 to 1992 (by 8.5 percent), whereas traffic between Batangas and both Puerto Galera and Abra de Ilog grew considerably, rising by 16.5 percent and a whopping 31.8 percent, respectively. The former growth in traffic was due to the initiation of RORO services to Puerto Galera in 1992. The minor port of Sablayan experienced a very steep decline of traffic to and from Batangas, from 1991 to 1992.

Traffic seasonality between Batangas and the various Mindoro ports is shown graphically in Figures 4.1 and 4.2. The seasonality of traffic between Batangas and the ports of Puerto Galera and Abra de Ilog is similar to the seasonality identified for many other

TABLE 4.1
PASSENGER TRAFFIC AT BATANGAS SAILING TO
OR FROM MINDORO PORTS, 1991

MINDORO PORTS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVE
CALAPAN														
Disembarked	43,115	36,905	28,669	34,713	30,394	25,271	21,775	37,410	32,301	40,873	42,487	47,956	421,863	35,155
Embarked	39,410	37,118	28,815	32,758	35,585	31,682	22,963	28,568	25,724	37,534	39,987	54,182	413,676	34,473
Seasonality Index														
Disembarked	123	105	82	99	86	72	62	106	92	116	121	136		
Embarked	114	108	84	95	103	92	65	83	75	109	116	157		
PUERTO GALERA														
Disembarked	2,727	3,837	3,601	5,481	5,012	3,900	2,668	2,437	2,638	3,282	4,611	5,658	45,852	3,821
Embarked	3,281	4,465	4,669	7,411	5,388	4,188	3,490	3,728	3,323	3,957	4,650	8,224	58,774	4,731
Seasonality Index														
Disembarked	71	100	94	143	131	102	70	64	69	86	121	148		
Embarked	69	94	89	157	114	89	74	79	70	84	98	174		
ABRA DE ILOG														
Disembarked	3,748	3,527	2,504	3,363	4,641	4,097	3,284	3,109	1,030	2,011	4,300	6,767	42,381	3,532
Embarked	3,655	4,031	3,303	4,798	4,130	3,613	3,029	3,556	1,323	2,142	4,725	7,169	45,474	3,790
Seasonality Index														
Disembarked	106	100	71	95	131	116	93	88	29	57	122	192		
Embarked	96	106	87	127	109	96	80	94	85	57	125	189		
SAN JOSE														
Disembarked	2,780	1,945	1,550	2,050	2,130	2,120	1,119	1,528	1,894	1,795	1,547	3,071	23,529	1,961
Embarked	1,510	1,462	1,085	1,727	1,800	1,435	666	1,101	1,574	1,278	2,117	2,480	18,215	1,518
Seasonality Index														
Disembarked	142	99	79	105	109	108	57	78	97	92	79	157		
Embarked	89	86	71	114	119	95	44	73	104	84	139	162		
SABLAYAN														
Disembarked	1,228	400	509	425	485	372	60	126	183	337	356	290	4,771	398
Embarked	801	542	521	502	439	475	151	193	146	514	395	409	5,088	424
Seasonality Index														
Disembarked	309	101	128	107	122	94	15	32	46	85	90	73		
Embarked	189	128	123	118	104	112	36	46	34	121	93	96		
TOTAL														
Disembarked	53,598	46,614	36,827	46,032	42,662	35,780	28,906	44,610	38,046	48,298	53,301	63,742	538,396	44,866
Embarked	48,657	47,618	38,393	47,196	47,342	41,393	29,699	37,146	32,090	45,425	51,874	72,394	539,227	44,936
Seasonality Index														
Disembarked	119	104	82	103	95	80	64	99	85	108	119	142		
Embarked	108	106	85	105	105	92	66	83	71	101	115	161		

Source: PPA Batangas

TABLE 4.2
PASSENGER TRAFFIC AT BATANGAS SAILING TO
OR FROM MINDORO PORTS, 1992

MINDORO PORTS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVE.
ALAPAN														
Disembarked	30,177	35,931	40,371	36,362	30,930	29,096	19,934	25,725	30,576	27,344	31,510	32,265	370,221	30,852
Embarked	33,190	33,297	38,206	39,184	36,354	34,939	25,712	27,065	30,780	30,172	31,567	34,072	394,538	32,878
Seasonality Index														
Disembarked	98	116	131	118	100	94	65	83	99	89	102	105		
Embarked	101	101	116	119	111	106	78	82	94	92	96	104		
PIERTO GALERA														
Disembarked	5,339	3,514	4,369	8,526	7,912	5,399	3,512	3,618	3,044	4,248	3,803	6,001	59,285	4,940
Embarked	5,578	4,613	4,813	9,119	4,939	6,461	3,394	3,656	3,420	4,112	4,056	7,066	60,227	5,019
Seasonality Index														
Disembarked	108	71	88	173	160	109	71	73	62	86	77	121		
Embarked	111	82	96	182	88	109	68	73	68	82	81	141		
RA DE ILOG														
Disembarked	3,019	3,603	5,464	8,444	9,849	6,773	3,014	2,620	2,448	2,897	3,337	5,294	66,752	4,729
Embarked	4,407	4,109	6,085	6,250	6,906	6,612	2,981	2,875	3,198	3,605	4,578	7,394	69,000	4,917
Seasonality Index														
Disembarked	64	76	116	179	208	143	64	55	52	61	71	112		
Embarked	90	84	124	127	140	134	61	58	65	73	83	150		
SAN JOSE														
Disembarked	3,195	1,800	1,750	1,893	2,876	2,415	1,560	1,870	2,281	1,282	1,970	2,296	25,188	2,099
Embarked	2,110	950	1,614	1,401	1,732	1,532	1,293	1,167	1,393	1,618	2,174	2,528	19,512	1,626
Seasonality Index														
Disembarked	152	86	83	90	137	115	74	89	109	61	94	109		
Embarked	130	58	99	86	107	94	80	72	86	100	134	155		
TABLAYAN														
Disembarked	498	400	509	425	485	372	60	126	183	337	356	290	4,041	337
Embarked	543	542	521	502	439	475	151	193	146	514	395	469	4,830	403
Seasonality Index														
Disembarked	148	119	151	126	144	110	18	37	54	100	106	86		
Embarked	135	135	129	125	109	118	38	48	36	128	38	102		
TOTAL														
Disembarked	42,228	45,248	52,463	55,650	52,052	44,055	28,080	33,959	38,532	36,098	40,976	46,146	515,487	42,967
Embarked	45,828	43,511	51,239	56,456	50,370	49,019	33,531	34,956	38,937	40,021	42,770	51,469	538,107	44,842
Seasonality Index														
Disembarked	98	105	122	130	121	103	65	78	90	84	95	107		
Embarked	102	97	114	126	112	109	75	78	87	89	95	115		

Source : PPA Batangas

FIGURE 4.1
SEASONALITY OF PASSENGER TRAFFIC BETWEEN
BATANGAS AND MINDORO PORTS, 1991

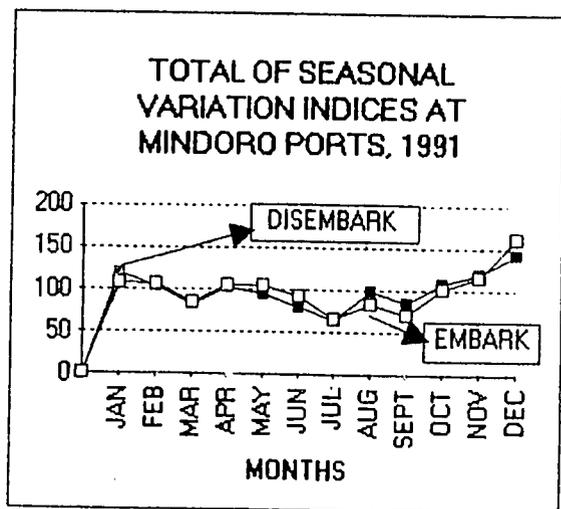
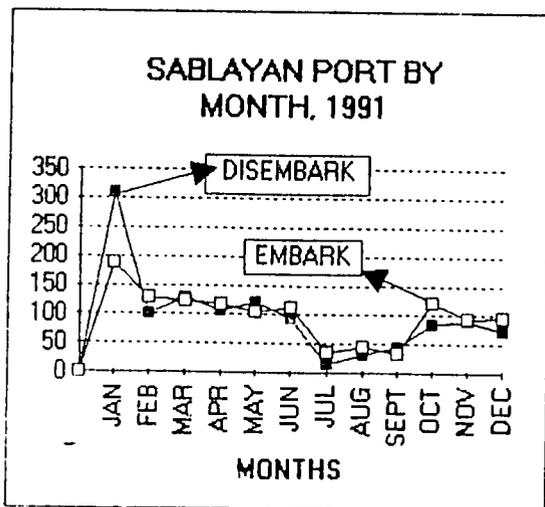
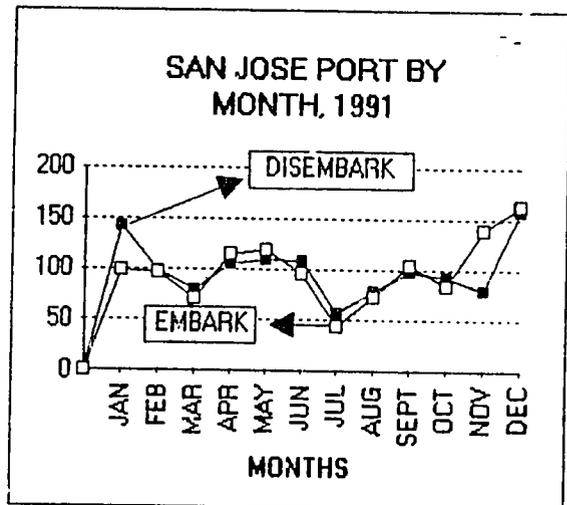
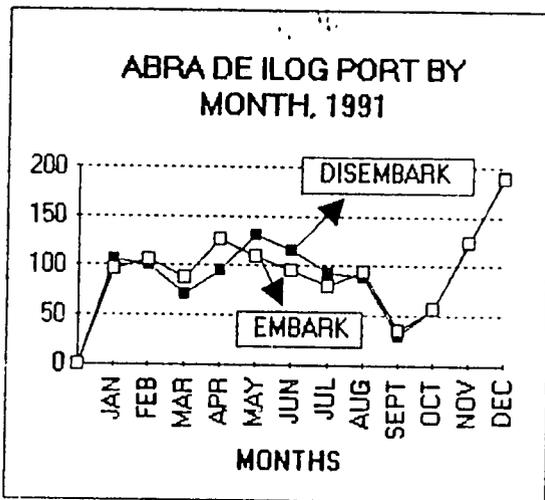
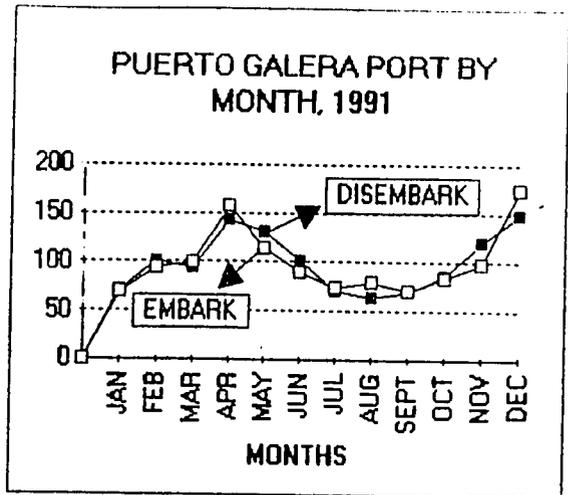
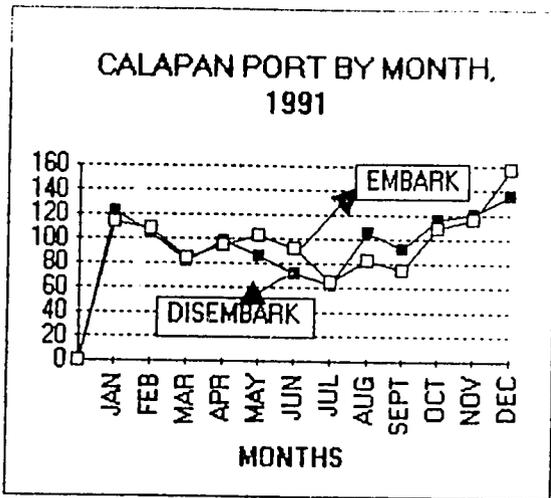
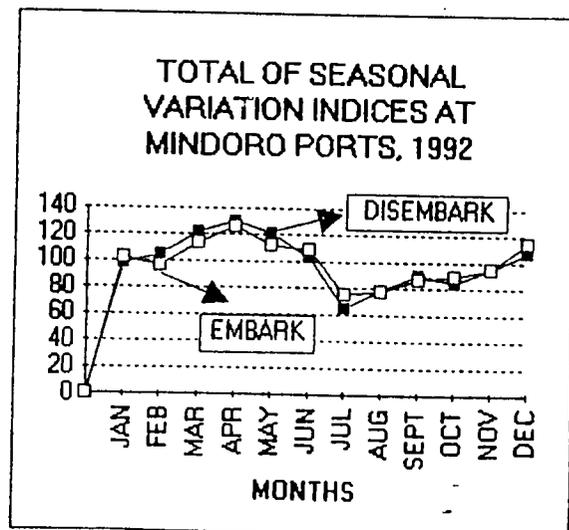
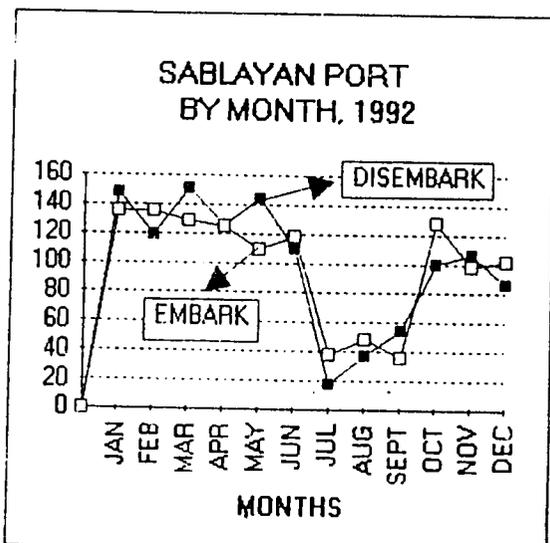
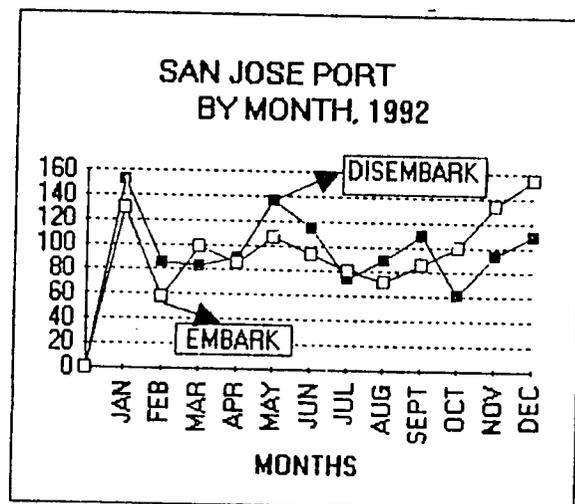
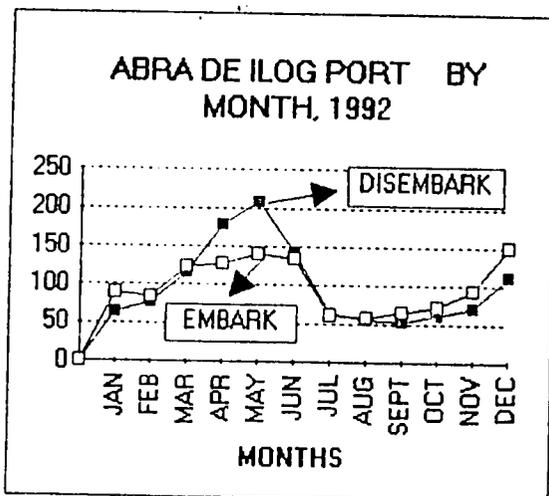
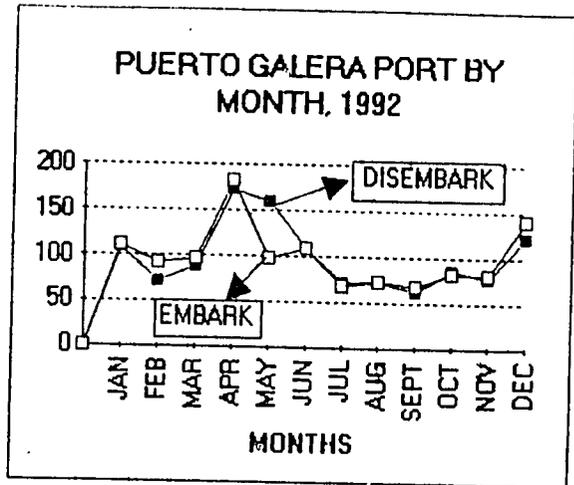
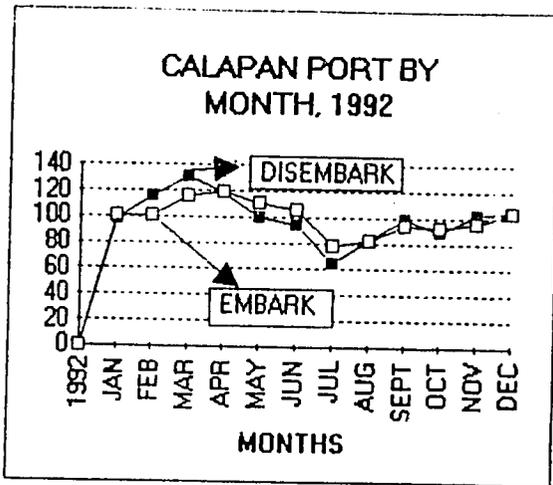


FIGURE 4.2
SEASONALITY OF PASSENGER TRAFFIC BETWEEN
BATANGAS AND MINDORO PORTS, 1992



routes in the Philippines (see the LSRS Report on Preparatory Work for a Seasonal Rates Pilot Project, dated June 1994), i.e., passenger volumes tend to peak in the periods of April-May or April-June. Calapan, however, experienced different seasonality patterns between the two years, 1991 and 1992, and statistics for a longer period would be needed in order to discern the "normal" seasonality of traffic between Batangas and that port.

The Table 4.2 total of 1,053,594 passengers traveling between Batangas and five ports of Mindoro represents approximately 92 percent of all passenger traffic through the port of Batangas in 1992. The three Mindoro ferry ports had virtually no other passenger traffic than these volumes of ferry passengers, but San Jose Port had an additional 6,500 passengers, according to PPA statistics, the majority of whom were probably traveling on the weekly voyage to and from Manila.

Table 4.3 indicates that passenger volumes at Calapan Port declined to around 729,000 in 1993, which represented declines of 5 percent and 13 percent from the 1992 and 1991 traffic levels, respectively. The more than 49,000 passengers at the port of San Jose, in 1993, represented a rise of 10 percent from 1992, and was 18 percent above the traffic level of 1991.

Marinduque

The passenger traffic was nearly 38 percent higher at Sta. Cruz Port than at Balanacan Port, in 1993, as shown in Table 4.4. The higher traffic at Santa Cruz was probably due to the fact that six vessels were regularly serving passenger traffic at Sta. Cruz, in mid-1993, and only one vessel was providing passenger services at Balanacan. On a daily basis, average traffic at the two ports was 270 passengers per direction at Sta. Cruz and nearly 200 passengers per direction at Balanacan in 1993. Traffic at both ports showed a very pronounced peak in the April-May period, and Sta. Cruz also had a pronounced peak of traffic in the month of December. The combined passenger traffic at the two ports was up only slightly from the combined levels of the preceding two years (when passenger traffic was averaging 332,000 per annum, and was down from the traffic levels of 1989 and 1990, when annual volumes exceeded 400,000 passengers. Prior to 1992, Balanacan was the principal Marinduque port for the accommodation of passenger traffic, although Sta. Cruz accommodated more passengers during the depression years of 1985-1986.

Romblon

Romblon Province has three principal islands, two of which, Romblon Island and Tablas Island, are important traffic generators. Romblon Island's principal port is Romblon Port and Tablas is

TABLE 4.3

**MINDORO ISLAND PORT
PASSENGER TRAFFIC, 1993**

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
ALAPAN														
Total passengers	54,278	52,511	43,634	70,410	62,524	72,758	68,072	66,721	65,947	57,338	58,649	55,846	728,688	60,724
Disembarked	24,843	24,821	21,818	36,980	30,289	35,629	37,452	37,123	37,452	31,437	31,427	28,691	377,962	31,497
Embarked	29,435	27,690	21,816	33,430	32,235	37,129	30,620	29,598	28,495	25,901	27,222	27,155	350,726	29,227
Seasonality Index														
Disembarked	79	79	69	117	96	113	119	118	119	100	100	91		
Embarked	101	95	75	114	110	127	105	101	97	89	93	93		
AN JOSE														
Total passengers	5,193	3,091	3,206	4,919	6,168	5,341	2,809	2,696	3,582	3,814	3,434	4,981	49,234	4,103
Disembarked	1,965	1,482	1,570	2,081	3,967	2,024	1,102	974	1,522	1,939	1,516	2,152	22,314	1,860
Embarked	3,228	1,609	1,636	2,838	2,181	3,317	1,707	1,722	2,060	1,875	1,918	2,829	26,920	2,243
Seasonality Index														
Disembarked	106	80	84	112	214	109	59	52	82	104	82	116		
Embarked	144	72	73	127	97	148	76	77	92	84	85	126		
RAND-TOTAL MINDORO														
Total passengers	59,471	55,602	46,840	75,329	68,692	78,099	70,881	69,417	69,529	61,152	62,083	60,827	777,922	64,827
Disembarked	26,808	26,303	23,388	39,061	34,276	37,653	38,554	38,097	38,974	33,376	32,943	30,843	400,276	33,356
Embarked	32,663	29,299	23,452	36,268	34,416	40,446	32,327	31,320	30,555	27,776	29,140	29,984	377,646	31,471
Seasonality Index														
Disembarked	80	79	70	117	103	113	116	114	117	100	99	92		
Embarked	104	93	75	115	109	129	103	100	97	88	93	95		

Site: At Berth Only

Source: Philippine Ports Authority

TABLE 4.4

**MARINDUQUE ISLAND PORT
PASSENGER TRAFFIC, 1993**

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
ALANACAN														
Total passengers	12,330	11,985	10,383	19,460	15,765	12,720	7,634	9,023	10,217	10,027	10,272	13,930	143,746	11,979
Disembarked	5,286	5,659	5,117	10,496	8,073	5,780	3,511	4,394	5,083	5,214	5,000	7,311	70,924	5,910
Embarked	7,044	6,326	5,266	8,964	7,692	6,940	4,123	4,629	5,134	4,813	5,272	6,619	72,822	6,069
Seasonality Index														
Disembarked	89	96	87	178	137	98	59	74	86	88	85	124		
Embarked	116	104	87	148	127	114	68	76	85	79	87	109		
LA CRUZ														
Total passengers	21,686	13,193	15,081	25,827	23,404	13,651	9,843	10,370	8,396	11,553	17,217	27,881	198,102	16,509
Disembarked	11,191	6,979	7,591	12,592	11,521	6,813	4,948	5,013	4,252	6,262	8,877	18,876	104,915	8,743
Embarked	10,495	6,214	7,490	13,235	11,883	6,838	4,895	5,357	4,144	5,291	8,340	9,005	93,187	7,766
Seasonality Index														
Disembarked	128	80	87	144	132	78	57	57	49	72	102	216		
Embarked	135	80	96	170	153	88	63	69	53	68	107	116		
RAND-TOTAL MARINDUQUE														
Total passengers	34,016	25,178	25,464	45,287	39,169	26,371	17,477	19,393	18,613	21,580	27,489	41,811	341,848	28,487
Disembarked	16,477	12,638	12,708	23,088	19,594	12,593	8,459	9,407	9,335	11,476	13,877	26,187	175,839	14,653
Embarked	17,539	12,540	12,756	22,199	19,575	13,778	9,018	9,986	9,278	10,104	13,612	15,624	166,009	13,834
Seasonality Index														
Disembarked	112	86	87	158	134	86	58	64	64	78	95	179		
Embarked	127	91	92	160	141	100	65	72	67	73	98	113		

Site: At Berth Only

Source: Philippine Ports Authority

served mainly by the port of Odiongan, or Poctoy. Intraprovincial traffic (i.e., between Romblon and Tablas islands) passes through the Tablas port of San Agustin, which is just a short distance (8 n.m.) west of the island of Romblon and its port.

Tables 4.5 and 4.6 indicate the passenger traffic between Batangas and the ports of Odiongan and Romblon in 1991 and 1992, respectively. From 1991 to 1992, the traffic on the Batangas-Odiongan route declined by 19 percent. As the two tables show, the decline was not spread evenly over the year, but was mainly due to the precipitous drop in traffic from 1991's peak month of May, when approximately 9,000 passengers traveled the Batangas-Odiongan route, to 1992's leanest month for passenger traffic, when only 1,700 passengers traveled the route. The route to Romblon showed a similar decline of traffic from May 1991 to May 1992, but that route's annual passenger traffic nevertheless grew slightly (by 3.5 percent) from 1991 to 1992. Figure 4.3 shows the seasonality of traffic on the routes from Batangas to Odiongan and Romblon, including their combined seasonality, in 1991 and 1992.

The Table 4.6 total of approximately 67,600 passengers on the routes between Batangas and the two Romblon Province ports represented just under six percent of total passenger traffic passing through the port of Batangas, in 1992, and, together with the Batangas-Mindoro traffic shown in Table 4.2, constituted 98 percent of total Batangas passenger traffic. The port of Odiongan also registered 19,200 passengers leaving for or arriving from other ports than Batangas. Where the port of Romblon is concerned, the Batangas route traffic represented only 17 percent of port passengers, totaling more than 77,000 in 1992. Much of that port's traffic comprises intraprovincial passenger volumes.

Table 4.7 presents 1993 passenger traffic data for the two Romblon Province ports. Traffic at Romblon Port grew only slightly from 1992 to 1993, but the levels in each year were historically high, as the annual traffic level had averaged 53,500, during 1989-1991, and the average for the 1981-1988 period was only 20,000 passengers per annum.

Masbate

Table 4.8 indicates the passenger traffic which was accommodated at Masbate Port in 1993. The peak month was March in that year, when nearly 15 percent of the annual total passenger traffic was accommodated at the port. The peak period continued through the month of April, but the most common months for traffic peaking, i.e., May, June and December, were not high-traffic months at Masbate. The 1993 traffic total was down from the 1992 traffic level of nearly 212,000 passengers, but exceeded the traffic volumes accommodated in any year of the 1980-1991 period.

TABLE 4.5

PASSENGER TRAFFIC AT BATANGAS SAILING TO
OR FROM ROMBLON PORTS, 1991

ROMBLON PORTS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVE.
ODIONGAN														
Disembarked	4,380	2,445	1,378	3,779	5,600	3,185	1,676	1,829	3,002	2,095	3,520	2,766	35,665	2,972
Embarked	3,930	2,997	2,166	3,568	3,410	1,625	1,247	2,111	3,470	1,730	2,167	2,990	31,411	2,618
Seasonality Index														
Disembarked	147	82	48	127	189	108	56	62	101	70	118	93		
Embarked	150	114	83	196	130	62	48	81	133	66	83	114		
ROMBLON														
Disembarked	214	525	476	450	525	301	276	141	403	748	128	473	4,660	388
Embarked	173	698	524	778	1,250	800	358	392	833	899	390	955	8,050	671
Seasonality Index														
Disembarked	55	135	123	116	135	78	71	38	104	193	33	122		
Embarked	28	104	78	116	188	119	53	58	124	134	58	142		
TOTAL														
Disembarked	4,594	2,970	1,854	4,229	6,125	3,486	1,952	1,970	3,405	2,843	3,648	3,239	40,325	3,860
Embarked	4,103	3,695	2,690	4,346	4,660	2,425	1,605	2,503	4,303	2,629	2,557	3,945	39,461	3,288
Seasonality Index														
Disembarked	137	88	65	126	182	104	68	69	101	85	109	98		
Embarked	125	112	82	132	142	74	49	76	131	80	78	120		

TABLE 4.6

PASSENGER TRAFFIC AT BATANGAS SAILING TO
OR FROM ROMBLON PORTS, 1992

ROMBLON PORTS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVE.
ODIONGAN														
Disembarked	2,550	1,750	1,900	1,560	1,305	2,683	2,311	2,302	1,100	2,808	3,141	3,571	26,981	2,248
Embarked	2,490	2,550	1,485	3,152	400	2,180	799	1,783	2,706	2,676	1,690	5,523	27,444	2,287
Seasonality Index														
Disembarked	113	78	85	69	58	119	103	102	49	125	140	159		
Embarked	109	111	65	138	17	96	35	78	118	117	74	241		
ROMBLON														
Disembarked	383	540	363	417	212	436	247	292	576	530	520	364	4,890	407
Embarked	932	365	360	493	352	998	722	715	781	733	978	840	8,269	609
Seasonality Index														
Disembarked	94	133	89	103	52	107	61	72	142	130	128	90		
Embarked	135	63	52	72	61	145	105	104	113	106	142	122		
TOTAL														
Disembarked	2,933	2,290	2,263	1,977	1,517	3,119	2,558	2,594	1,676	3,338	3,661	3,935	31,861	2,655
Embarked	3,422	2,915	1,845	3,645	752	3,188	1,521	2,498	3,487	3,409	2,668	6,363	35,713	2,976
Seasonality Index														
Disembarked	110	86	85	74	57	117	96	98	63	126	138	148		
Embarked	115	98	62	122	25	107	61	84	117	115	90	214		

Source : PPA Batangas

FIGURE 4.3
SEASONALITY OF PASSENGER TRAFFIC BETWEEN BATANGAS
AND ROMBLON PORTS, 1991 AND 1992

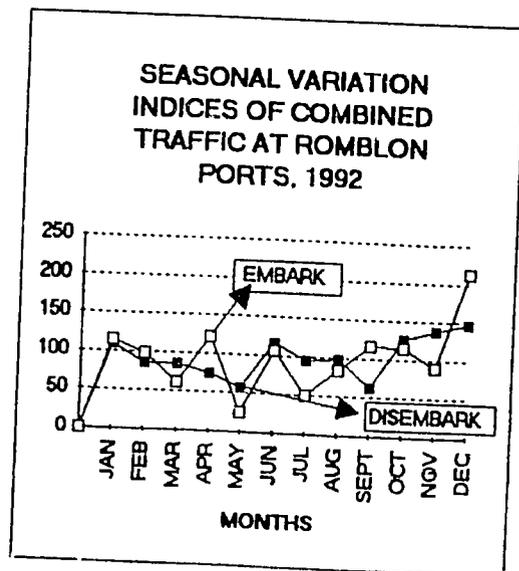
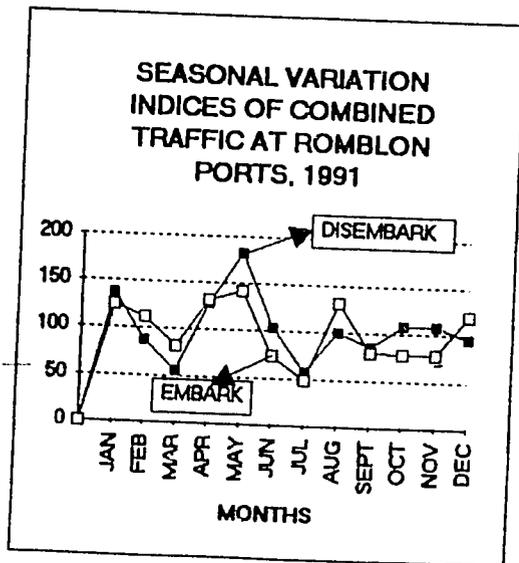
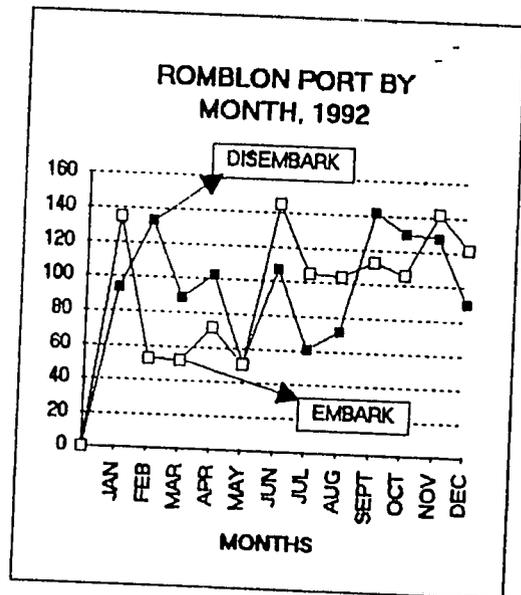
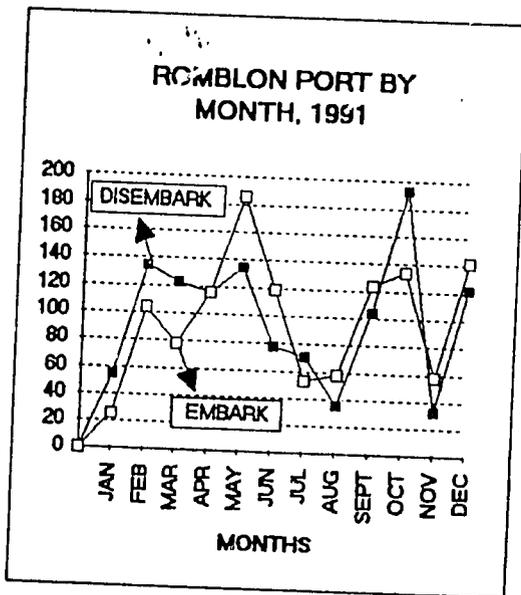
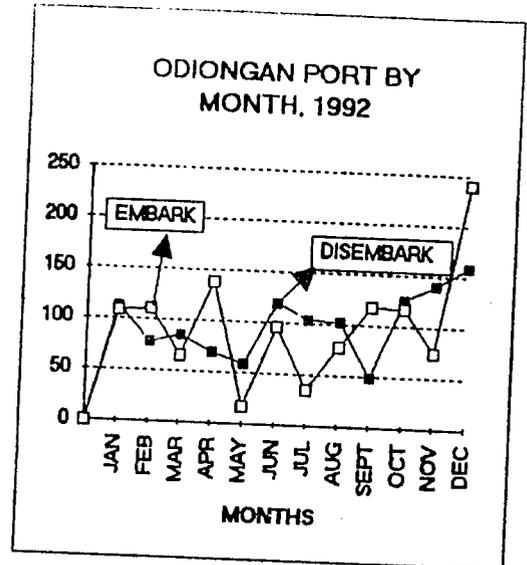
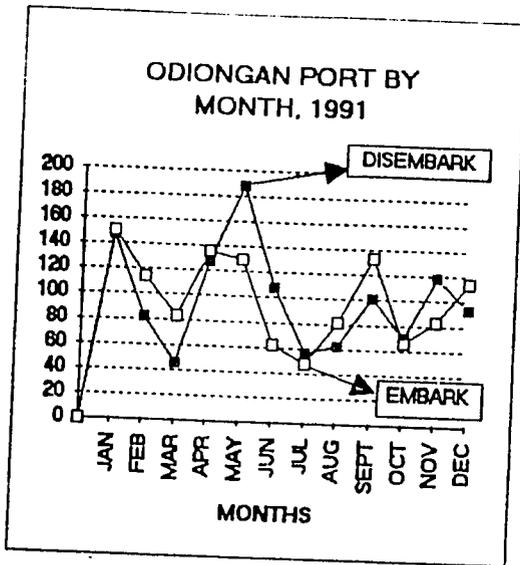


TABLE 4.7
ROMBLON ISLAND PORT
PASSENGER TRAFFIC, 1993

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
ROMBLON														
passengers	10,020	7,009	6,603	7,928	9,517	8,630	5,769	5,223	4,915	4,977	4,575	4,746	79,932	6,661
embarked	4,914	3,663	3,356	3,763	4,401	4,175	2,763	2,428	2,645	2,414	2,205	2,360	39,087	3,257
disembarked	5,106	3,346	3,247	4,165	5,116	4,455	3,026	2,795	2,270	2,563	2,370	2,386	40,845	3,404
Quality Index														
embarked	151	112	103	116	135	128	85	75	81	74	68	72		
disembarked	150	98	95	122	150	131	89	82	67	75	70	70		
BOY (ODIONGAN)														
passengers	8,862	5,006	6,257	5,369	12,876	9,665	6,563	7,299	8,913	6,593	9,098	8,216	94,717	7,893
embarked	5,003	2,054	3,200	3,979	3,840	4,130	2,385	3,051	4,286	2,873	3,390	3,166	41,357	3,446
disembarked	3,859	2,952	3,057	1,390	9,036	5,535	4,178	4,248	4,627	3,720	5,708	5,050	53,360	4,447
Quality Index														
embarked	145	60	93	115	111	120	69	89	124	83	98	92		
disembarked	87	66	69	31	203	124	94	96	104	84	128	114		
GRAND-TOTAL ROMBLON														
passengers	18,882	12,015	12,860	13,297	22,393	18,295	12,332	12,522	13,828	11,570	13,673	12,962	174,649	14,554
embarked	9,917	5,717	6,556	7,742	8,241	8,305	5,148	5,479	6,931	5,287	5,595	5,526	80,444	6,704
disembarked	8,965	6,298	6,304	5,555	14,152	9,990	7,204	7,043	6,897	6,283	8,078	7,436	94,205	7,850
Quality Index														
embarked	148	85	98	115	123	124	77	82	103	79	83	82		
disembarked	114	80	80	71	180	127	92	90	88	80	103	95		

TABLE 4.8
MASBATE PORT
PASSENGER TRAFFIC, 1993

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
passengers	17,364	17,063	29,616	25,173	17,892	14,727	11,764	9,055	12,940	13,669	12,969	16,045	198,277	16,523
embarked	9,465	9,310	10,145	12,733	8,973	7,732	6,237	4,664	6,815	7,413	6,877	8,946	99,308	8,276
disembarked	7,899	7,753	19,473	12,440	8,919	6,995	5,527	4,391	6,125	6,256	6,092	7,099	98,969	8,247
Quality Index														
embarked	114	112	123	154	108	93	75	56	82	90	83	108		
disembarked	96	94	236	151	108	85	67	53	74	76	74	86		

TABLE 4.9
VIRAC PORT
PASSENGER TRAFFIC, 1993

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	AVE
passengers	8,843	8,009	6,227	8,617	13,314	10,021	5,711	7,314	6,099	5,217	12,055	6,795	98,227	8,186
embarked	5,012	3,916	3,585	4,550	6,584	4,583	2,765	3,608	3,477	3,085	7,311	2,538	51,014	4,251
disembarked	3,836	4,093	2,642	4,067	6,730	5,438	2,946	3,706	2,622	2,132	4,744	4,257	47,213	3,934
Quality Index														
embarked	118	92	84	107	155	108	65	85	82	73	172	60		
disembarked	97	104	67	103	171	138	75	94	67	54	121	108		

At Berth Only
: Philippine Ports Authority

Catanduanes

Table 4.9 presents the 1993 passenger traffic statistics for Virac Port. The port had a typical peaking of traffic during May-June, but then had an unusual second peak in the month of November (rather than the more common second peak in December). The 1993 annual traffic level was significantly above the average of 82,000 passengers per annum accommodated during 1991-1992, but was lower than the totals recorded at the port in 1980 and 1988. The LSRS has information on only the annual passenger totals at San Andres Port during 1991-1993, and these volumes were, respectively, 25,000, 51,400, and 38,000 passengers.

Bicol Peninsula

Table 4.10 presents passenger traffic information for three ports of the Bicol Peninsula. The volumes at Matnog Port dwarf the levels accommodated at the other two ferry ports, and traffic peaking at Matnog extended for four months, in 1993, with passengers moving in the Luzon-to-Eastern Visayas direction peaking during April-June, and traffic moving in the opposite direction peaking during May-July. The traffic peak at Tabaco Port was April-June. The Bulan Port traffic peak was unusual, falling in the final quarter of the calendar year.

Passenger Service Standards

Mindoro

The LSRS surveyed five routes between Batangas and ports of Mindoro Island. Three of these are ferry service routes, with voyages of between 1.5 and 2.5 hours, and the others are liner service routes, with sailing time of 10 hours and 12 hours. There is some evidence that the latter two may no longer be viable for passenger traffic if the Mindoro road network is considerably improved. Survey results and service standards are discussed below, by surveyed route.

Batangas-Calapan Route. The LSRS interviewed 199 passengers, sailing on four vessels (identified in Table B.1 and other tables of Annex B), on the Batangas-Calapan route. Three-quarters of the surveyed passengers responded to a survey question regarding frequency, and, of those responding, fully 90 percent of all respondents indicated that they traveled the route 10 or more times a year. Thus, passengers interviewed on this route knew the services well, and their judgments of service adequacy or inadequacy therefore deserve to be taken as authoritative. Eighty-seven percent of the passengers interviewed responded to the question as to purpose of their travel, and, of those responding,

TABLE 4.10

**BICOL PENINSULA FERRY
PASSENGER TRAFFIC, 1993**

CLASSIFICATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL	AVE.
JLAN PORT														
Total passengers	3,939	3,954	3,205	3,930	4,121	3,754	2,854	3,235	4,390	5,222	4,674	6,487	49,765	4,147
Disembarked	1,775	1,710	1,262	1,688	1,767	1,636	1,673	1,456	1,891	2,399	2,252	3,178	22,687	1,891
Embarked	2,164	2,244	1,943	2,242	2,354	2,118	1,181	1,779	2,499	2,823	2,422	3,309	27,078	2,257
Seasonality Index														
Disembarked	94	90	67	89	93	87	88	77	100	127	119	168		
Embarked	96	99	86	99	104	94	52	79	111	125	107	147		
ATNOG PORT														
Total passengers	68,122	46,260	46,128	76,509	100,401	87,931	74,513	71,202	70,436	63,255	60,226	66,436	831,419	69,285
Disembarked	33,225	23,682	21,874	36,594	46,671	45,201	47,406	35,785	33,964	30,921	30,044	32,557	417,924	34,827
Embarked	34,897	22,578	24,254	39,915	53,730	42,730	27,107	35,417	36,472	32,334	30,182	33,879	413,495	34,458
Seasonality Index														
Disembarked	95	68	63	105	134	130	136	103	98	89	86	93		
Embarked	101	66	70	116	156	124	79	103	106	94	88	98		
ABACO PORT														
Total passengers	9,487	7,011	7,003	12,427	15,387	15,688	9,118	11,068	9,663	8,327	8,584	11,255	125,018	10,418
Disembarked	4,068	3,620	3,004	6,271	8,907	9,185	4,980	5,855	4,994	4,203	4,760	6,235	66,082	5,507
Embarked	5,419	3,391	3,999	6,156	6,480	6,503	4,138	5,213	4,669	4,124	3,824	5,020	58,936	4,911
Seasonality Index														
Disembarked	74	66	55	114	162	167	90	106	91	76	86	113		
Embarked	110	69	81	125	132	132	84	106	95	84	78	102		
LAND-TOTAL BICOL PENINSULA														
Total passengers	81,548	57,225	56,336	92,866	119,909	107,373	86,485	85,505	84,489	76,804	73,484	84,178	1,006,202	83,850
Disembarked	39,068	29,012	26,140	44,553	57,345	56,022	54,059	43,096	40,849	37,523	37,056	41,970	506,693	42,224
Embarked	42,480	28,213	30,196	48,313	62,564	51,351	32,426	42,409	43,640	39,281	36,428	42,208	499,509	41,626
Seasonality Index														
Disembarked	93	69	62	106	136	133	128	102	97	89	88	99		
Embarked	102	68	73	116	150	123	78	102	105	94	88	101		

te: At Berth Only

srce: Philippine Ports Authority

40 percent were traveling for business reasons, including marketing of agricultural or other produce and travel assignments from the offices where they were employed. Students represented 17 percent of the respondents to the purpose of travel question, which was not surprising since this particular LSRS Survey was conducted near the end of the peak travel period (June), when many students were on vacation. Non-student vacationers represented 28 percent of the purpose-of-travel question respondents.

Passengers on three of the four vessels where LSRS surveys were conducted viewed services being provided favorably, whereas passengers on the fourth vessel expressed themselves as being largely dissatisfied with services. The fact that they continued to patronize this fourth vessel must mean that they placed a heavy weight on the convenience of the service schedule (although the LSRS did not specifically ask that question). The principal findings of this survey are:

- ▶ On every vessel, at least 84 percent of the passengers surveyed responded to a question regarding adequacy of services to meet demand. On three of these vessels between 88 and 98 percent of those responding rendered a judgment that services were adequate. On the fourth vessel surveyed, however, 19 of the 30 passengers responding (31 passengers were interviewed) found services of the vessel to be inadequate to accommodate all service demand.
- ▶ Regarding adherence to service schedule, at least 80 percent of surveyed passengers responded on every vessel, and on the vessel considered to be not fully responsive to service demand all 31 passengers interviewed responded to this question. On that vessel, 58 percent of the passengers surveyed viewed the operator as reliably keeping to schedule. On the other three vessels, those passengers who rated service schedule adherence as good ranged from 84 to 95 percent of respondents to the question.
- ▶ A similar pattern of response was obtained in regard to safety. Between 73 and 94 percent of passengers surveyed on the four vessels responded to a question regarding the adequacy of the operator's concern for safety, and, on the same three of four vessels where favorable responses were obtained in regard to service adequacy and reliability, the respondents viewed operator concern for safety favorably; between 80 and 93 percent of respondents on each of these vessels viewed operator concern for safety as being satisfactory. On the fourth vessel, however, nearly two-thirds (66 percent) of respondents felt that the operator did not give adequate concern to safety.

- ▶ There was more general dissatisfaction with baggage accommodation and security. On only one of the four vessels surveyed did a majority of respondents (57 percent), but nevertheless a minority of total passengers surveyed (46 percent), agree that space for baggage accommodation was adequate. Where security of baggage was concerned, however, only 40 percent of passengers interviewed, and 46 percent of respondents to the question, on this same vessel, felt that security was satisfactory. Very few passengers on the other three vessels found either the space for baggage accommodation or baggage security to be adequate; only 23 passengers out of 136 interviewed on these three vessels viewed space as adequate, and even fewer, 18 passengers, expressed satisfaction with baggage security. On one of these three vessels, however, most surveyed passengers did not respond to this question. The proportion of passengers on these three vessels who responded negatively in regard to baggage space was 56 percent of surveyed passengers and 77 percent of total respondents. The proportion who viewed baggage security as unsatisfactory was 54 percent of interviewed passengers and 81 percent of respondents.
- ▶ Three of the four vessels surveyed were thought by a small majority (51 percent) of the combined survey sample for those vessels to have well organized boarding procedures, and the proportion of respondents to this question who held this view was 74 percent. Where the fourth vessel was concerned, most surveyed passengers (94 percent) responded to the question regarding boarding procedure, and nearly two-thirds of the respondents indicated that the boarding procedure was unsatisfactory.

Besides these principal findings of the LSRS Batangas-Calapan passenger survey, there were several more specific findings that are of interest and shed light on route service adequacy:

- ▶ More than half of the passengers interviewed (29 out of 55) on one vessel indicated that services of the vessel had improved over the preceding period of two years.
- ▶ Although one-third of passengers surveyed said that congested travel was a problem in the peak travel season, only one of the 199 passengers suggested that it would be desirable to increase the number of vessels serving the route during the peak season. (Ten passengers, however, suggested that franchising additional operators on the route was desirable to offer competition to the dominant operator.)
- ▶ The most common suggestion among passengers was that

cleanliness of vessels should be better maintained. Approximately 70 percent of interviewed passengers on each of two of the four surveyed vessels indicated that toilets were poor or unacceptable. On a third vessel, providing services which otherwise were highly rated, 13 passengers, nearly equally divided between first and third class, specifically suggested that there was a need to improve the cleanliness of the vessel's toilets.

- ▶ Vessel crew courtesy and assistance was rated highly for one vessel, rated as fair in the cases of two other vessels, and found to be poor in the case of the fourth vessel.
- ▶ Despite the fact that the survey was being conducted in the peak travel season, more than 40 percent of the interviewed passengers on each of two vessels indicated that space to move around during the voyage was good-to-excellent, and on all four vessels, 60 percent or more of interviewed passengers, and 84 percent of respondents to the question regarding space, found space availability for movement to at least be satisfactory. Only three passengers, all first class, aboard two vessels, viewed space limitations as unacceptable.
- ▶ A few passengers on each vessel complained of insufficient availability of water for drinking, but this was apparently a serious problem aboard just one vessel, where slightly over half of the interviewed passengers complained of lack of drinking water.
- ▶ On three of the four vessels surveyed, the passengers mostly rated the ferry canteen and food as at least fair, and on one vessel fully 56 percent of surveyed passengers expressed the view that the vessel's canteen and food were good to excellent.
- ▶ Ventilation was a problem on the same vessel, with 35 percent of interviewed passengers rating ventilation as poor or unacceptable. On each of the other three surveyed vessels, fewer than ten percent of surveyed passengers indicated that ventilation was a problem.

Business World, on 27 July, 1993, carried an article to the effect that the provincial government of Oriental Mindoro wanted to acquire "at least three ferry boats in an effort to put an end to the sea transport monopoly" that served the province. The article indicated that the same individual owned both Viva Shipping Lines and Sto. Domingo Shipping Lines which "are the two shipping firms said to be enjoying a virtual monopoly of the interisland shipping trade in Oriental Mindoro".

Two of the three vessels surveyed by the LSRS that were performing well in the Batangas-Calapan route were vessels of the Manila International Shipping Company (MISC). The third vessel surveyed by the LSRS which was performing well, and had improved services in comparison with what they were two years earlier (according to more than half of the vessel's surveyed passengers), was a Viva Shipping Line vessel which had been diverted to Batangas-Calapan from its franchised Batangas-Masbate route. The one surveyed vessel which was not performing well belonged to Sto. Domingo Shipping Lines, which, as the newspaper article indicated, was owned by the same individual that owned Viva.

This LSRS Final Report volume is, in places, critical of services which were being performed by Viva Shipping Lines, in 1993, but, on the Batangas-Calapan route, Viva was operating in a competitive environment and performing mostly adequate services. The services of its sister company required upgrading on the route, but the situation was far from the undesirable one portrayed in the article.

Batangas-Abra de Ilog Route. Voyage time on this 24 n.m. ferry route is approximately 2.5 hours in each direction. In 1993, there were three RORO vessels serving the Batangas-Abra de Ilog ferry route, and the LSRS conducted passenger surveys aboard each of these vessels in June of that year. A combined total of 108 passengers were interviewed. Unlike the Batangas-Calapan route, not many passengers were travelling between Batangas and Abra de Ilog on business; just 10 percent of surveyed passengers indicated that their purpose of travel was business or a work assignment as an employee. Students constituted a high 26 percent of passengers interviewed, and non-student vacationers and holiday takers constituted only slightly higher, 27 percent of the survey sample.

One-third of the passengers interviewed were taking the Batangas-Abra de Ilog voyage at least once a month, and this percentage rises to 56 percent when only respondents to the frequency question are considered. Although this latter percentage is considerably lower than the average travel frequency on the Batangas-Calapan route (where 90 percent of respondents to the travel-frequency question indicated that they traveled the route 10 times or more per year), the Batangas-Abra de Ilog passenger travel frequency was nevertheless high, meaning that a large proportion of responses to LSRS questions were provided by individuals who were quite knowledgeable about the service being evaluated. This circumstance provides a measure of confidence in the reliability of passenger responses to accurately reflect the quality of services being performed.

Principal findings of the Batangas-Abra de Ilog passenger survey are:

- ▶ The passengers on only one of the three vessels surveyed

thought that services were adequate to meet demand; all of the respondents to that survey question (50 percent of passengers surveyed on that vessel) rated services as adequate. On the other two vessels, however, the majority of passengers answered that services were not adequate to meet demand. (The June 1993 survey was probably being conducted within the peak period of passenger travel on this route, however, so the levels of dissatisfaction with available shipping capacity would not reflect the more "normal" situation in other seasons of the year. See Tables 4.1 and 4.2 for the seasonality experienced on the Batangas-Abra de Ilog route during 1991 and 1992, respectively.)

- ▶ All passengers interviewed on one of the three surveyed vessels indicated a satisfaction with the operator's adherence to schedule, and, on a second vessel, most respondents to the question answered that service schedule reliability was good, but more than half of the passengers surveyed on this vessel did not respond to the question. Passengers on the third vessel were less pleased with service schedule adherence, with one-third of total passengers surveyed (and 40 percent of respondents to the service-reliability question) expressing dissatisfaction.
- ▶ In regard to operator concern with safety, 50 of 88 passengers interviewed on two vessels expressed dissatisfaction with operator attention to safety considerations, whereas, on the third vessel, only one of ten responding passengers expressed dissatisfaction.
- ▶ Baggage space for stowage and baggage security were adjudged by passengers on two vessels to be largely satisfactory; in fact, none of the passengers on one vessel had any complaint regarding either space availability or security, and, on the other vessel, only one passenger expressed dissatisfaction in each case. Passengers on the third vessel surveyed, however, were less pleased with baggage accommodation, with slightly more than half of the respondents to the space and security questions, and 36-40 percent of total passengers interviewed, indicating that both space for stowage and security were inadequate.
- ▶ Where a boarding procedure is concerned, passengers on two of the three vessels expressed satisfaction in that boarding was organized, whereas on the third vessel only 43 percent of interviewed passengers expressed this view.

All of the foregoing results need to be weighted, since the vessel providing the services with which the passengers were least

pleased is the largest vessel on the route, and provided 70 percent of the LSRS survey sample. Thus, only 31 percent of the combined total of passengers surveyed viewed services on the route as adequate to meet demand; 55 percent found service schedule adherence to be good; just 39 percent thought adequate attention was being given to safety; 35 percent viewed baggage stowage space as adequate; 56 percent were satisfied with baggage security; and 46 percent were satisfied with the boarding procedure.

As in the case of the Batangas-Calapan route, only the passengers aboard the Viva Shipping Lines vessel indicated that there had been a noticeable improvement of services over the past two years. Thus, it may be that the passengers on this vessel were not so much expressing their satisfaction with services on any absolute scale, as they were cognizant of how much better services were in 1993, relative to what they had been in earlier years.

Besides these principal findings of the LSRS Batangas-Abra de Ilog passenger survey, there were a few more specific findings that offer insight into needs for services improvement:

- ▶ Slightly over two-thirds of the passengers surveyed rated toilets/sanitary facilities as poor or (2 passengers) unacceptable. The percentage of passengers expressing this view ranged from 55 to 83 percent on the three vessels surveyed.
- ▶ Ventilation was rated as poor on the largest ferry by about 37 percent of passengers interviewed, and nearly 60 percent of respondents to the question, whereas more than 80 percent of the interviewed passengers on the other two vessels rated ventilation as fair to excellent.
- ▶ On one of three vessels, 95 percent of the passengers interviewed rated the vessel canteen and food as fair to excellent, whereas majorities of passengers interviewed on the other two vessels found the vessel canteens and food to be poor.
- ▶ Most of the interviewed passengers on all three vessels found the courtesy and helpfulness of the respective crews to be satisfactory, but only 7 passengers rated the crews highly in this regard.
- ▶ Only a minority of the passengers on each vessel (ranging from 26 to 42 percent) found drinking water availability to be satisfactory.
- ▶ A statistically remarkable result is that exactly one-half of the passengers surveyed on each of the three vessels answered that space to move about during the voyage was satisfactory. Most of the other passengers

(35 percent) did not find space to move about to be satisfactory (this group ranged from 20 to 42 percent on the three vessels).

- ▶ The most common suggestion of passengers for service improvement was that more attention should be given to maintaining vessel cleanliness; 34 percent of interviewed passengers made this suggestion, and another 3 passengers (on one vessel) noted the desirability of toilets having water.
- ▶ The only other suggestion made by more than 5 passengers was that additional vessels should be put on the route; 12 passengers made this suggestion, and another 4 passengers suggested that an end should be put to the monopolization of the route.

Batangas-San Jose Route. Passengers at San Jose, Occidental Mindoro, were generally not satisfied with the passenger services that linked the area to the ports of Manila and Batangas, and despite the poor condition of the San Jose-Abra de Ilog road, travelers often were going to Abra de Ilog to catch a ferry rather than sailing by liner vessel to Batangas or to Manila. The ferry operated every day and closely adhered to schedule; it also required less time (5 hours by road to Abra de Ilog plus 2.5 hours for the crossing to Batangas by ferry versus 12 hours to sail from San Jose to Batangas) and, on most days, the road transport/ferry alternative cost less (P100 for road transport to Abra de Ilog and P50 for ferry passage versus a passenger fare of P240 for the San Jose-Batangas voyage). On Sundays, however, Viva Shipping Lines, which operated the RORO vessel, the MV Marian, plying the San Jose-Batangas route, was lowering the passenger fare by P100 to P140, and passengers reported that the lower fare caused the vessel to depart overloaded. MV Marian passengers surmise that the Sunday discount policy was designed to attract passengers who otherwise might have sailed the next day on the MV Melody, which was providing once-a-week direct sailing to Manila at fares of P350 for airconditioned class and P250 for ordinary class. This voyage required 24 or 25 hours, roughly 14 hours longer than by taking the road/ferry transport alternative through Abra de Ilog, and nearly 10 hours longer than traveling from San Jose to Batangas by sea and continuing to Manila by road.

The LSRS surveyed passengers on Viva's MV Marian, obtaining a sample of 50 passengers. One-half of these passengers were traveling for business reasons, and about one-quarter were traveling on vacation. Half of the interviewed passengers traveled the route at least once a month, and 80 percent traveled the route at least twice a year. The principal findings of this LSRS survey are:

- ▶ Passengers generally rated the service highly in several

important respects including schedule reliability, the accommodation of baggage, the space reservation system, and operator concern for safety. In each of these cases a minimum of 68 percent of interviewed passengers, and a minimum of 76 percent of respondents to the survey questions viewed the performance of the vessel operator favorably.

- ▶ Passengers were less favorable in regard to the adequacy of services to meet demand. Although 56 percent were of the view that services were adequate, another 38 percent thought they were not.
- ▶ Where an organized boarding procedure was concerned, 56 percent felt that the procedure was satisfactory, and just 18 percent of interviewed passengers found fault with the procedure.
- ▶ In regard to physical accommodation and the vessel crew, the majority of passengers interviewed judged nearly everything to be satisfactory, or fair, with the exception of bedding and blankets, where 34 percent of interviewed passengers, and 44 percent of respondents to the question, viewed the situation as poor or unacceptable.
- ▶ In making suggestions as to how services might be improved, only three passengers identified a need to improve the cleanliness of the vessel, which is a very different survey result than those obtained on the Batangas-Mindoro ferry routes. The only suggestions made by more than 10 percent of the interviewed passengers were that bedding should be provided and that there should be more leisure facilities and drinking fountains.

Batangas-Sablayan Route. A conventional passenger/cargo vessel, the MV Sta. Ana, was serving the Batangas-Sablayan route, providing only third class passenger accommodation, and the voyage time in one direction was 10 hours. As in the case of the travelers from San Jose, those from Sablayan had the option of traveling by road to Abra de Ilog and taking the ferry to Batangas, which entailed a combined 5-6 hours of travel. Referring back to Tables 4.1 and 4.2, it appears that the jump in traffic at Abra de Ilog from 1991 to 1992 and the sharp decline of passenger volumes at Sablayan resulted largely from decisions by Sablayan-based travelers to opt for the road/ferry travel alternative.

From the LSRS survey, only about 30 percent of the passengers on the MV Sta. Ana were traveling on business, and, given the usually higher value placed on time by business travelers as compared with most other travelers, it is quite possible that a disproportionate number of business travelers had opted for the

time-saving road/ferry transport alternative, which would save them at least 9-10 hours per round-trip. Travelers on the Batangas-Sabluyan sea voyage did not travel the route as frequently as the average passenger on other Batangas-Mindoro port routes, which correlates with the lower proportion of business travelers. Just 19 percent of the MV Sta. Ana passengers surveyed indicated that they traveled the route one or more times per month, and fully 41 percent of the passengers said that their travel frequency on the route was fewer than four times per year.

The LSRS survey sample of MV Sta. Ana passengers was 70, and the principal findings of the survey are:

- ▶ Just 41 percent of passengers surveyed were of the view that the services being offered at Sablayan were adequate to meet demand, whereas 57 percent of the passengers interviewed stated that services were not adequate.
- ▶ The majority of passengers interviewed, ranging between 59 and 69 percent of the total, viewed the services performed by the MV Sta. Ana favorably in terms of adherence to schedule, space reservation, baggage accommodation and security, operator concern for safety, and an organized boarding procedure.
- ▶ Where standards of physical accommodation were concerned, approximately half of the passengers interviewed rated both toilet/sanitary facilities and food/canteen as either poor or unacceptable. Only a minority of passengers responded to questions regarding bedding and blankets and leisure facilities, but most who responded were negative, with 40 percent of passengers rating the bedding/blanket situation as poor or unacceptable, and 34 percent of the survey sample expressing similar views in regard to leisure facilities. Where ventilation was concerned, half the passengers surveyed found that aspect of accommodation to be satisfactory (fair to good), and 27 percent found ventilation to be unsatisfactory. One-third of the passengers complained of the insufficient availability of drinking water. Only where space to move around was concerned, of the various aspects of physical accommodation, did a clear majority of the passengers surveyed (60 percent) find the situation to be fair to good.
- ▶ The majority of passengers interviewed (61 percent) judged the courtesy of the vessel's crew and their willingness to provide assistance to be fair to good, but 28 percent of the survey sample expressed the opposing view, indicating that the crew were neither very courteous nor very helpful to passengers.

- ▶ By far the most common suggestion (advanced by 54 percent of the passengers) was that bedding and/or drinking fountains should be provided on the vessel. Only five passengers suggested that it would be desirable to initiate services of a second vessel on the route.

Batangas-Puerto Galera Route. This route is the shortest (17 n.m.) between Batangas and Mindoro, and requires under two hours of sailing. The LSRS conducted surveys of passengers on two vessels plying the route, one of them a RORO vessel and the other a wooden-hulled passenger ship. The survey sample was 100 passengers (53 on one vessel and 47 on the other). Relatively higher proportions of travelers were traveling for vacation and holiday on this route than on other routes linking Batangas and Mindoro, and, correspondingly, there were lower proportions of business travelers on the route. The survey identified that business travelers represented just 11 percent of the passengers on one vessel and 19 percent on the other. Nearly one-quarter of surveyed passengers, making the voyage one or more times a month on the average, and just over half of the passengers responded that they sailed the route at least four times a year. A significant number of passengers (26 percent) did not respond to the travel-frequency question, however.

The principal findings of the LSRS passenger survey on the Batangas-Puerto Galera route are:

- ▶ More so than on any of the other Batangas-Mindoro routes surveyed by the LSRS, passengers on the Batangas-Puerto Galera route expressed satisfaction that services offered were adequate to meet demand. The proportion expressing this view was 69 percent of passengers surveyed, and 80 percent of respondents to the question.
- ▶ An even higher proportion of surveyed passengers were of the view that operators closely adhered to schedule; 84 percent stated this view, or 95 percent of total respondents to the schedule-adherence question.
- ▶ Majorities of surveyed passengers also viewed favorably the space reservation system of each operator, the space availability and security of baggage stowage, operator concern for safety, and the vessel boarding procedures. In these cases, the majorities ranged from 53 percent to 81 percent of passengers interviewed on the individual vessels, or from 58 to 74 percent when the two vessels are taken together. When non-respondents are excluded, the proportions of passengers expressing favorable views jumps to the range of 72 to 90 percent, considering both vessels together.
- ▶ Responses to questions were similar on both vessels

surveyed in most cases, but where several aspects of physical accommodation were concerned, one vessel was rated much higher than the other. Nearly half of the passengers on the former vessel rated the vessel's canteen/food and toilet/sanitary facilities as good to excellent, and the availability of drinking water as fair to good. Three-quarters of the passengers on this vessel were also satisfied with the space to move about the vessel during the voyage, and nearly the same proportion rated the crew's attitude and helpfulness to passengers as being fair to excellent. The second vessel was given a fair rating in most of these same aspects.

- ▶ More than half of the passengers interviewed on the higher-rated vessel had no suggestions for service improvement, and the only suggestion made by more than 10 percent of the survey sample on that vessel was for greater attention to cleanliness (7 of 53 passengers offered this suggestion). On the second vessel, one-quarter of the survey sample indicated a need to improve cleanliness, and 17 percent expressed a general request that services and facilities be improved.

Marinduque

The LSRS surveyed one RORO vessel on each of the two routes that serve Dalahican-Marinduque traffic. The principal findings from these surveys are presented in the following paragraphs and the detailed findings are presented in Tables B.88 through B.119 of Annex B.

Sta. Cruz-Dalahican Route. Passengers were surveyed aboard the MV John, which provided only third class service, and the survey sample was 51 passengers. Of these, 25 were traveling on business or as an employee, and 23 were students. Approximately one-third of the passengers interviewed traveled the route more than 4 times per year, one-quarter traveled the route between 2 and 4 times per year, and one-third indicated that they took the journey just once a year. The remainder did not answer the travel frequency question or were infrequent travelers. Principal findings of the survey are:

- ▶ Passengers were nearly equally divided on the question of adequacy of services to meet demand, with 51 percent viewing services as adequate and 43 percent viewing services as inadequate.
- ▶ Two-thirds of the passengers surveyed indicated that shipping operator adherence to service schedule was good, but one-fifth of the passengers disagreed.

- ▶ All interviewed passengers agreed that there was no system of space reservation.
- ▶ Most passengers (90 percent of the survey sample) indicated that space for stowing baggage was not adequate, but most of these same passengers viewed baggage security as satisfactory. (Only 20 percent of the passengers were estimated (by themselves) to be carrying more than 15 kgs of baggage, and the average number of pieces per passenger was approximately two.)
- ▶ According to 94 percent of the passengers, the vessel had no organized boarding procedure. The other 6 percent (3 passengers) did not answer the boarding-procedure question.
- ▶ Most passengers (61 percent) thought that the operator showed sufficient concern for safety, but what might be considered as a disturbing minority of 35 percent of the interviewed passengers disagreed with the majority view.
- ▶ The LSRS obtained a poor response to the question on facets of physical accommodation, but most passengers responded in regard to the supply of drinking water and the adequacy of space to move about during the voyage; in the case of water availability, 60 percent of respondents (and 45 percent of passengers interviewed) rated drinking water availability as poor or unacceptable, and, where space was concerned, 24 of the 47 responding passengers considered space availability to be fair, while most of the others considered space to move about to be inadequate.
- ▶ Nearly all passengers interviewed offered suggestions for improvement, with 15 percent or more requesting more space, blankets, additional comfort rooms and drinking fountains, and improved attention to cleanliness, and 18 percent arguing that anyone with a ticket should be provided with a seat.

Balanacan-Dalahican Route. This is a ferry route of just 28 n.m. The LSRS surveyed the only vessel serving this route, the MV Seagold, which provided only third class passenger service. The vessel is the RORO type, but passengers routinely occupied a portion of the space designed to accommodate vehicles. The survey sample obtained by the LSRS on this route was 75 passengers. Like the Sta. Cruz-Dalahican route, students represented a sizable proportion of the survey sample, in this case 41 percent, whereas business travelers represented just 21 percent. Only 14 percent of the passengers surveyed indicated that they traveled the route more than five times per year, and 42 percent of the survey sample indicated that their travel frequencies did not exceed one voyage

per annum on this route.

The principal findings of the LSRS passenger survey on board the MV Seagold are:

- ▶ Nearly three-quarters of the interviewed passengers (and 78 percent of respondents to the question) viewed the vessel's passenger services as being adequate to meet demand on the route.
- ▶ Nearly all of the passengers (92 percent, and 95 percent of respondents to the question) were of the opinion that the ferry operator's adherence to schedule was good.
- ▶ Unlike the Sta. Cruz-Dalahican ferry, the MV Seagold operator had a satisfactory space reservation system, according to 69 percent of the MV Seagold survey sample, and 78 percent of respondents to the question.
- ▶ MV Seagold passengers were also more sanguine about safety than were the passengers sailing from Sta. Cruz, with 77 percent of the former holding the view that the operator showed adequate concern for safety, and just 17 percent (half the proportion on the other route) expressing dissatisfaction with evidence of operator concern.
- ▶ The majority of MV Seagold passengers were not impressed that the boarding procedure was organized, but a sizeable minority (28 percent) found the procedure to be satisfactory.
- ▶ Only 12 percent of the interviewed passengers judged stowage space for baggage to be adequate, and just 2 of the 75 passengers in the sample viewed baggage security as good.
- ▶ More than half of the passengers interviewed (55 percent, and 59 percent of respondents to the question) expressed the view that services had improved over the past two years.
- ▶ A sizable proportion of the passengers, 69 percent, indicated that congested travel during the peak season constituted a serious problem.
- ▶ A large 86 percent of the survey sample rated space to move about during the voyage as fair to excellent.
- ▶ Only 57 percent of the passengers interviewed offered any suggestions for service improvement, with the only suggestion made by 15 percent or more of the passengers

being that the number of seats should correspond to the number of tickets.

Catanduanes

The LSRS surveyed only the Tabaco-Virac route connecting Catanduanes to Luzon, and the principal results of this survey are discussed below, with more detailed results being presented in Tables B.120 through B.136 of Annex B.

Tabaco-Virac Route. The LSRS surveyed the only RORO vessel on the route, the MV Eugenia. The survey sample was 104 passengers. Only 57 of these passengers responded to the LSRS question about trip purpose, so it's not possible for the LSRS to be very accurate on this matter. Those who responded were nearly equally divided among three groups: business travelers, students, and non-student vacationers and others. Nearly half of the passengers interviewed also did not respond to the question regarding travel frequency on the route, and only 12 passengers indicated that they traveled the route more than six times per year; another 9 passengers traveled the route at least three times per year. Average travel frequency was probably significantly less on this route than on the Batangas-Mindoro and the Dalahican-Marinduque ferry routes discussed in the foregoing pages of this chapter.

Principal findings of the survey of passengers on the MV Eugenia are:

- ▶ Slightly over half of the survey sample (53 passengers) indicated that they deemed services to be adequate to meet demand; 41 passengers disagreed with this view.
- ▶ A sizeable proportion of the survey sample, 88 percent, expressed the view that operator adherence to schedule was good. This was contrary to the views of shippers in Catanduanes regarding this particular vessel, which they claimed had frequent engine trouble, forcing interruption of service. The difference of opinion may be due to a generally low travel frequency among the passengers, which would make them poor judges of service reliability. Some may have responded to this question merely on the basis of operator schedule adherence on the day of the survey.
- ▶ Large proportions of the survey sample (ranging from 35 percent to 90 percent) did not respond to LSRS questions regarding the adequacy of space reservation, baggage accommodation and security, operator concern for safety, and the boarding procedure. Most of the results are therefore not useful, but 65 percent answered the question regarding operator concern for safety, and it

might be useful to note that 60 percent of respondents viewed operator concern favorably and the remaining 40 percent (26 percent of the entire sample) were not convinced that the operator showed sufficient concern for safety.

- ▶ Passengers were much more inclined to answer questions regarding physical accommodation and the attitude of the vessel's crew. In regard to the latter, 72 percent of the interviewed passengers found the courtesy and helpfulness of the crew to be at least fair, and only 20 percent of the passengers thought otherwise. In the passengers' view, there was insufficient availability of drinking water on board (so 81 percent said) and toilets and sanitary facilities were poor (the view of 79 percent). Other aspects of physical accommodation, including space to move about, the canteen and food, ventilation, and leisure facilities, were mostly rated as fair.
- ▶ Although only 38 percent of the passengers indicated that they had also sailed the route aboard another vessel, 43 percent of the passengers were of the opinion that the services of the MV Eugenia were superior to other services provided on the route. Just 6 percent of the survey sample preferred the services of another operator on the route.
- ▶ Despite the fact that 72 percent of surveyed passengers rated crew courtesy and helpfulness as fair or better, a high 45 percent suggested that crew courtesy ought to be improved. The only other suggestion by 15 percent or more of the passengers was that seats should be provided for all passengers.

Romblon

The LSRS surveyed only the Odiongan-Batangas route, which is the principal route serving Romblon Province. The voyage distance is 102 n.m., slightly less than the 107 n.m. between Batangas and Romblon Port. The LSRS surveyed passengers aboard the MV Kristoffer at Odiongan, and supplemented this with a passenger survey at Batangas, so that a total survey sample of 101 passengers was obtained. The results of these surveys are discussed below.

Odiongan-Batangas Route. A fairly high 38 percent of the passengers surveyed on the Odiongan-Batangas route indicated that they were traveling for business purposes, and these passengers represented 51 percent of the respondents to the travel-purpose question. Travel frequency was high, although there were two distinct groups of passengers from the standpoint of frequency of

traveling the Odiongan-Batangas route: 35 percent of the passengers surveyed (and 39 percent of respondents to the question) had a travel frequency of between 1 and 4 times per month; and 54 percent of the passengers surveyed (and 60 percent of respondents to the question) traveled the route between 1 and 5 times per year.

Principal findings of the LSRS surveys on the Odiongan-Batangas route are:

- ▶ Fully two-thirds of the passengers expressed the view that services were not adequate to meet demand.
- ▶ The only service characteristic which interviewed passengers viewed favorably was operator adherence to schedule, where 83 percent viewed operator service schedule reliability as being good. This service-reliability judgment is probably accurate, because, unlike on the Virac-Tabaco route, there was a large proportion of frequent travelers on the Odiongan-Batangas route.
- ▶ Otherwise, passengers were not favorably impressed with MV Kristoffer services. More than half of the passengers surveyed (56 percent of the total, and 60 percent of respondents to the question) felt that the operator did not show adequate concern for safety; 79 percent indicated that there was not a satisfactory space reservation system; 75 percent were not favorably impressed with the boarding procedure; a high 37 percent found the crew attitude toward passengers to be unacceptable, and another 22 percent rated crew courtesy and helpfulness as poor; and an average of three-quarters of the passengers were dissatisfied with space for stowage of baggage (70 percent) and baggage security (78 percent). Where physical accommodation was concerned, the MV Kristoffer earned unacceptable ratings not even approached on other routes surveyed by the LSRS, including space to move about during the voyage (44 percent unacceptable and 21 percent poor), availability of drinking water (47 percent unacceptable and 26 percent poor), canteen/food standards (46 percent unacceptable and 24 percent poor), toilets/sanitary facilities (44 percent unacceptable and 31 percent poor), bedding and blankets (51 percent unacceptable and 20 percent poor), and ventilation (46 percent unacceptable and 19 percent poor). When non-respondents are taken into account, the proportions of passengers responding to the questions who were of the view that the various aspects of physical accommodation were either unacceptable or poor were: space availability (74 percent), drinking water (88 percent), canteen/food (72 percent), toilets/sanitary facilities (77 percent), bedding/blankets (97 percent),

and ventilation (80 percent). Given these high percentages of dissatisfaction, it says something about the fairness of the interviewed passengers that they were overwhelmingly willing to give the operator "his due" by attesting to his good adherence to schedule (see above).

- ▶ A very high proportion of the passengers, 87 percent, expressed the view that congested travel in the peak season constituted a serious problem.

Masbate

The LSRS surveyed three vessels on a total of four routes. The MV Cebu Princess was surveyed for the Manila-Masbate leg of its route in Manila and was subsequently surveyed in Masbate for its Masbate-Cebu leg. The respective survey samples obtained for these two legs were 73 passengers and 66 passengers. The ferry routes were being operated by smaller vessels, which were conventional passenger ferries; Masbate was not being served by any RORO ferry in 1993 (but such services were initiated in 1994, according to the PPA). The LSRS surveyed the MV Masbate on the Masbate-Bulan route, and the survey sample obtained was 22 passengers. The MV Gloria was surveyed on the Masbate-Pilar route, and the survey sample obtained was just 13 passengers. The LSRS Survey results for each of these four routes are discussed below.

Manila-Masbate Route. The MV Cebu Princess was loaded with vacationers when surveyed in Manila, with 71 percent of the LSRS survey sample comprising non-student vacationers and holiday-takers, and students (also on vacation) representing 10 percent of the sample. Only 4 business travelers were included in the sample. Principal findings of the Manila-Masbate route passenger survey are:

- ▶ A large majority of the passengers surveyed (82 percent) thought that services were adequate to meet demand, and only 3 third class passengers dissented from this view.
- ▶ An even larger majority (88 percent), with only 2 second class passengers dissenting, deemed operator concern for safety to be satisfactory.
- ▶ The proportion of interviewed passengers who thought that the boarding procedure was well organized was also high, at 81 percent (and just over 90 percent of respondents to the question).
- ▶ Nearly three-quarters of the interviewed passengers were of the view that the space reservation system of the operator was satisfactory.

- ▶ The passenger majorities expressing favorable views in regard to baggage accommodation were not as large as the majorities identified above, but nevertheless more than 60 percent of interviewed passengers thought baggage stowage areas were adequate, and just over half of the passengers surveyed expressed the view that baggage security was satisfactory. In regard to this latter view, there were just 4 dissenters, as a sizable proportion (42 percent) of the surveyed passengers did not respond to the baggage-security question.
- ▶ With regard to physical accommodation standards, passengers rated various aspects of physical accommodation as fair (40 to 66 percent), but sizable minorities of the interviewed passengers were mildly disapproving of toilets/sanitary facilities (37 percent), leisure facilities (34 percent), ventilation (29 percent), drinking water availability (27 percent), and space to move about (26 percent). It is noteworthy, however, that not a single passenger rated a single aspect of physical accommodation as unacceptable.
- ▶ Roughly three times as many passengers rated the vessel crew's attitude toward passengers as fair (60 percent) as those who felt that the crew's attitude required improvement (21 percent).
- ▶ Despite the high rating given by passengers to service adequacy to meet demand (see above), fully 42 percent of the survey sample felt that congestion during the peak travel season constituted a serious problem.
- ▶ There were only two suggestions offered by more than five passengers, and one of these should please the operator: 12 passengers requested that management improve the sanitary facilities and maintaining their cleanliness; whereas another 12 passengers (4 in first class and 8 in third) requested only that the operator maintain his high standards of service.

Masbate-Cebu Route. Whereas Masbateños were traveling by sea to Manila preponderantly for vacation (or, so the LSRS survey just described would suggest), the sea voyage from Masbate to Cebu was patronized by both businessmen and vacationers. Of the 66 passengers who constituted the LSRS survey sample for the Masbate-Cebu voyage, 19 were traveling on business, 29 were non-student holiday-takers, 7 were students on holiday, and 11 were either traveling for some other purpose or did not answer the travel-purpose question. The willingness of business travelers to go by sea between Masbate and Cebu may be because the voyage is only 148 n.m., whereas the voyage from Masbate to Manila is 260 n.m. A high 43 percent of the passengers interviewed indicated that their

travel frequencies on the route were one or more times per month, and with the exception only of one passenger who did not respond to the travel-frequency question, all passengers interviewed traveled the route at least once a year. With such travel frequencies, it can be expected that the passengers interviewed were very knowledgeable about the services they were being asked to rate, and the survey results, therefore, should accurately reflect the adequacy of service.

Principal findings of the LSRS survey of the Masbate-Cebu route are:

- ▶ A sizable majority (62 percent) of the interviewed passengers viewed services as being adequate to meet demand on the route, but nearly one-third of the survey sample disagreed.
- ▶ Passengers gave the operator an unusually low reliability rating, with 42 percent of the passengers indicating dissatisfaction with schedule adherence. A small majority (52 percent) nevertheless expressed themselves as finding service reliability satisfactory.
- ▶ The operator's highest rating from the passengers came in regard to safety, with 83 percent of the survey sample expressing satisfaction with the operator's concern for safety.
- ▶ Most passengers viewed the space reservation system of the operator favorably, but in regard to this aspect of shipping line service there was some difference of view among passenger classes. Whereas all ten of the first class passengers who were interviewed thought space reservation was satisfactory, the percentages of second class and third class passengers who agreed with the prevailing view were 77 and 67 percent, respectively.
- ▶ Passengers viewed less favorably the vessel boarding procedure, with 42 deeming it to be organized, and 48 percent finding fault with the procedure.
- ▶ Only the first class passengers were satisfied with the vessel's baggage stowage space and baggage security. Second class passengers were about evenly divided between favorable and unfavorable views of both aspects (space and security) of baggage accommodation, and an average of 30 percent of third class passengers were satisfied with one or the other aspect of baggage accommodation.
- ▶ Nearly two-thirds (64 percent) of the mostly frequent travelers of the survey sample indicated that there had been a noticeable improvement of services on the route

over the preceding period of two years.

- ▶ A high 55 percent of the survey sample deemed congested travel conditions, during the peak travel season, to constitute a serious problem.
- ▶ With regard to aspects of physical accommodation, very few passengers gave high ratings or very low ratings to any aspect, and, as might be expected, first class passengers found facilities to be more nearly satisfactory than did passengers of second and third class. The first class rated facilities, bedding/blankets, food and drinking water supplies to be mostly fair, whereas majorities of second and third class passengers rated space to move about, drinking water availability, and the canteen and food as poor. All classes, however, rated both toilet facilities and ventilation as fair (73 percent and 77 percent of total respondents, respectively).
- ▶ There were just three suggestions for service improvement made by more than 4 passengers: a total of 19 passengers (including 7 of the 10 first class passengers) requested that greater attention be given to maintaining vessel cleanliness; 15 passengers (mostly in third class) asked that food services be improved; and 8 passengers (all but 1 in third class) asked that baggage compartments be provided.

One LSRS survey question, which was not well answered in most passenger surveys, was fairly well answered in the Masbate-Cebu route survey, and this question has to do with other sea voyages which the passengers had taken in the preceding period of two years. Perhaps surprisingly, none of the passengers responding to the question indicated that they had sailed to Manila during the period. Connections to Cebu dominated the answers, and most had traveled the Masbate-Cebu route, and a few had also traveled to Cebu from Sorsogon, Cataingan, Ormoc, and Bulan.

Masbate-Bulan Route. All 22 of the passengers interviewed on the Masbate-Bulan passenger ferry, MV Masbate, had traveled the route before with 41 percent (9 passengers) sailing the route between 1 and 10 times a month, and most of the other passengers (12) indicating that their frequency of sailing the route was in the range of 1 to 10 times per year. Only 2 passengers were traveling on business, and another 2 were students; 10 passengers indicated that they were on vacation; and the remainder of the passengers either did not answer the travel-purpose question or had some travel purpose other than business or vacation. Principal findings of the Masbate-Bulan ferry service survey are:

- ▶ The ferry service was rated favorably by 19 of the 22

demand and operator concern for safety.

- ▶ Most of the passengers (16) were critical of the operator's lack of any organized boarding procedure.
- ▶ Survey results were not significant where space reservation and baggage accommodation were concerned, as the small survey sample was about evenly divided between holding favorable and unfavorable views on these aspects of service.
- ▶ A striking result, however, was that 17 of the 22 interviewees rated toilet/sanitary facilities as good to excellent. The LSRS did not obtain such a favorable result on this important aspect of physical accommodation on any other vessel surveyed on northern island routes.
- ▶ Other aspects of physical accommodation where at least 15 of the 22 passengers expressed the same view were food/canteen (fair), bedding/blankets (poor), drinking water availability (fair), and ventilation (good to excellent - a unanimous view).
- ▶ Regarding travel congestion in the peak travel season, 17 of the 22 passengers indicated that they considered congestion to constitute a serious problem.

Masbate-Pilar Route. Because the sample size that the LSRS obtained on this route was only 13 passengers, the only survey results that are of significance are those points on which passengers were unanimous or nearly unanimous. Thus, the only passenger views presented below are those held by 11 or more of the 13 passengers interviewed. On this basis, the survey results do not permit the LSRS to say anything useful about passenger trip purposes or travel frequency. Some useful results were obtained, however, viz.:

- ▶ Nearly all of the passengers (11) viewed services as adequate to meet demand, and 12 passengers felt that services were being reliably operated.
- ▶ All passengers interviewed agreed that the operator was showing adequate concern for safety.
- ▶ All 12 passengers answering the baggage-accommodation question decried the inadequacy.
- ▶ All 12 passengers responding to a question regarding crew courtesy and helpfulness rated the crew's attitude as unacceptable.

- ▶ Either 12 or 13 passengers rated each of the following aspects of physical accommodation as poor or unacceptable: food/canteen, drinking water availability, space to move about during the voyage, toilet/sanitary facilities, and bedding/blankets. Only in regard to ventilation did the vessel earn a rating of fair from the passengers (11 of 12 responding).
- ▶ Eleven passengers expressed the view that congested travel constituted a serious problem during the peak travel season.

Passenger Service Fares

For the most part, operators on the principal liner shipping and ferry routes were adhering to officially sanctioned rates for third class passengers, i.e., the passage was within MARINA's 1993 fork tariffs for the respective routes. Table 4.11 identifies the actual passage paid by first, second, and third class passengers interviewed by the LSRS, and Table 4.12 presents the official 1993 fork tariffs for third class passage on a number of northern island routes. The third class passage for the Batangas-Calapan crossing and for the liner routes connecting Manila to Masbate and Masbate to Cebu, were within the official ranges. Two of the other ferry routes had one or more operators that were in compliance with MARINA rates for the route, or for routes of comparable distance; these two routes are Batangas-Abra de Ilog, and Masbate-Bulan. Third class passage on the Batangas-Puerto Galera route was on the high side, considering that this route was only 17 n.m., or about 70 percent of the length of the Batangas-Calapan route.

Some of the other liner and ferry services imposed high passages on third class passengers, including:

- ▶ Batangas-Odiongan liner service, where third class passage was 30 percent higher than the upper end of the official fork tariff, despite the fact that these passenger services were among the poorest surveyed by the LSRS.
- ▶ Marinduque ports-Dalahican ferry service, where third class passage was as much as 62 percent above the upper end of the official passage range for the route.
- ▶ Manila-San Jose liner service, where the rate was approximately 50 percent above the maximum allowable rate. However, on Sundays, the operator was reducing third class passage to P140, which was within the-MARINA-specified fork tariff.

TABLE 4.11

ACTUAL PASSENGER FARES BY ROUTE, 1993

(In Pesos)

ROUTES NAME OF VESSELS	FIRST CLASS	SECOND CLASS	THIRD CLASS
BATANGAS - CALAPAN			
MV Diamond	45-60	-	30
MV Sto. Domingo	35	-	30
MV San Lorenzo Ruiz	40	-	30
MV Sta. Maria	-	-	30
BATANGAS - ABRA DE ILOG			
MV Don Vicente	60	40	28
MV Peñafrañcia	-	-	52
MV Doña Matilde	-	-	40
BATANGAS - SAN JOSE			
MV Marjan	-	-	240
BATANGAS - SABLAYAN			
MV Sta. Ana	-	-	140
BATANGAS - PUERTO GALERA			
MV Queen ACVIII	70	48	28
MV San Miguel de Ilijen	-	-	40
ODIONGAN - BATANGAS			
MV Kristopher	247	160	160
STA. CRUZ - DALAHICAN			
MV John	-	-	50
BALANACAN - DALAHICAN			
MV Seagold	-	-	56
TABACO - VIRAC			
MV Eugenia	-	-	33
MASBATE - PILAR			
MV Gloria	-	-	50
MASBATE - ZULAN			
MV Masbate	-	-	24
MASBATE - CEBU			
MV Cebu Princess	265-525	220-265	159
MANILA - MASBATE			
MV Cebu Princess	525-610	300-425	264

TABLE 4.12

SCHEDULE OF OFFICIAL NORTHERN ISLAND ROUTE
THIRD CLASS PASSAGE
 (Effective January 1993)

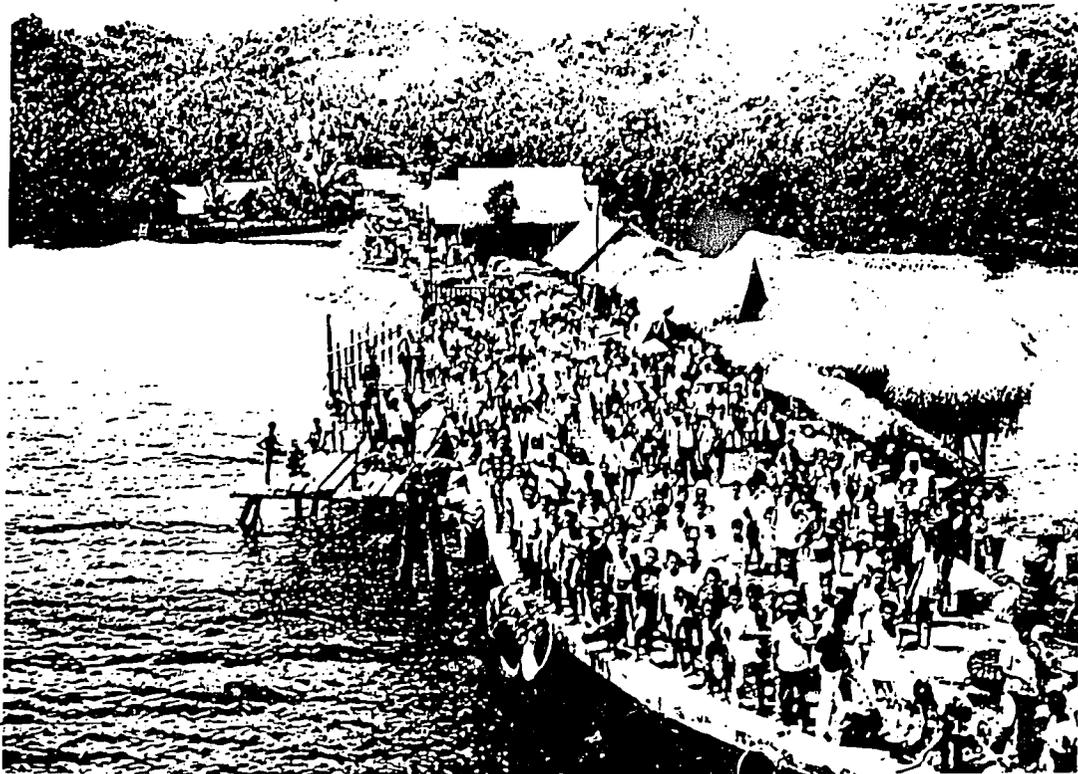
PORT LINKS		THIRD CLASS PASSAGE (Pesos)		
		NM	MINIMUM	MAXIMUM
BATAH	ODIONGAN	66	62.75	81.20
CAGAYAN	MASBATE	264	230.55	298.35
CAGAYAN	ODIONGAN	338	269.15	348.30
CALBAYOG	MASBATE	66	62.75	81.20
CAPIZ	ROMBLON	69	65.60	84.90
CATBALOGAN	MASBATE	88	83.65	102.25
CEBU	MASBATE	148	129.25	167.25
DUMAGUETE	MASBATE	253	220.95	285.90
DUMAGUETE	ROMBLON	71	67.50	87.35
ESTANCIA	ODIONGAN	127	110.90	143.50
ILIGAN	MASBATE	282	246.25	318.70
ILIGAN	ODIONGAN	320	262.00	339.10
ILOILO	ODIONGAN	172	150.20	194.40
ILOILO	ROMBLON	167	145.85	188.75
MAASIN	MASBATE	170	148.45	192.10
MANILA	MASBATE	260	227.10	293.80
MANILA	ODIONGAN	180	157.20	203.40
MANILA	ROMBLON	184	160.70	207.95
MANILA	SABLAYAN	136	118.75	153.70
MANILA	SAN JOSE	277	241.90	313.00
MASBATE	ODIONGAN	115	100.45	129.95
MASBATE	ORMOC	134	117.00	151.45
MASBATE	TACLOBAN	117	102.20	132.20
ODIONGAN	PULUPANDAN	184	160.70	207.95
ROMBLON	ROXAS	68	64.65	83.65
MASBATE	TAGBILARAN	193	168.55	218.10
ODIONGAN	PTO. PRINCESA	275	240.15	310.80
ODIONGAN	ZAMBOANGA	345	274.70	355.50
SAN JOSE	TILIK	122	106.55	137.90
BATANGAS	CALAPAN	24	22.80	29.50
BATANGAS	ROXAS	87	82.70	107.00
BATANGAS	ODIONGAN	102	95.00	123.00
BATANGAS	SAN JOSE	141	123.15	159.35
BATANGAS	DALAHICAN	51	48.50	62.75
BATANGAS	BALANACAN	55	52.30	67.65
CALAPAN	ROXAS	65	61.80	79.95
CALAPAN	ODIONGAN	79	75.10	97.15
CALAPAN	SAN JOSE	117	102.20	132.20
CALAPAN	DALAHICAN	34	32.30	41.80
CALAPAN	BALANACAN	37	35.20	45.50
ROXAS	ODIONGAN	29	27.55	35.70
ROXAS	SAN JOSE	45	42.75	55.35
ROXAS	DALAHICAN	129	112.65	145.80
ROXAS	BALANACAN	107	95.00	123.00
ODIONGAN	SAN JOSE	64	60.80	78.70
ODIONGAN	DALAHICAN	92	87.45	113.15
ODIONGAN	BALANACAN	64	60.85	78.70
SAN JOSE	DALAHICAN	129	112.65	145.80
SAN JOSE	BALANACAN	104	95.00	123.00
DALAHICAN	BALANACAN	28	26.65	34.45
BATANGAS	SAN AGUSTIN	105	95.00	123.00
SAN AGUSTIN	ROMBLON	8	7.60	9.85
ROMBLON	AMBULONG	20	19.00	24.60
BATANGAS	ROMBLON	107	95.00	123.00
BATANGAS	AMBULONG	119	103.90	134.50
BATANGAS	CAJIDIOCAN	145	126.60	163.90
SAN AGUSTIN	AMBULONG	23	21.85	28.30
SAN AGUSTIN	SAN FERNANDO	32	30.40	39.35
SAN AGUSTIN	CAJIDIOCAN	51	48.50	62.75
ROMBLON	SAN FERNANDO	31	29.45	38.15
ROMBLON	CAJIDIOCAN	43	40.85	52.90
AMBULONG	CAJIDIOCAN	16	15.20	19.70

SOURCE: MARINA (Maritime Industry Authority)

PORT OF ODIONGAN, ROMBLON



Apron area is full of local people, passenger jeepneys, tricycles and goods for loading.



People at the apron include those awaiting for arriving passengers and those who are embarking.

5. FACTORS AFFECTING SERVICE ADEQUACY

Introduction

The discussions of Chapters 3 and 4 have identified that RORO ferry services have constituted a boon to the island of Mindoro, especially, and to a lesser extent to the islands of Marinduque, Tablas, and Catanduanes. The island of Masbate was bereft of such services at the time that the LSRS conducted its fieldwork on that island (July 1993), but PPA indicates that the private sector provided makeshift RORO berths at the ports of Masbate and Bulan, and introduced RORO services on the Masbate-Bulan ferry route in 1994. Although RORO services have considerably facilitated the movement of goods, and stimulated the growth of trade, between the northern islands and Luzon, none of the islands had entirely satisfactory services, during 1993. The principal underlying causes for the service inadequacies identified in Chapters 3 and 4 were:

- ▶ Inadequate port development and/or access, and unsatisfactory arrastre services and/or irrational charging for services.
- ▶ Insufficient shipping operator competition.

The remainder of this chapter looks at the individual islands or island groups of the northern islands, and examines in each case the extent to which the port system, road access to ports, and arrastre services were satisfactory, during 1993-1994, to enable the shipping industry to effectively respond to demand for liner shipping and ferry services. The chief constraint in this regard is not discussed below, however: the long delay in the commencement of the Batangas Port development project has created severe congestion at that port, and has effectively prevented the desirable proliferation of services performed to the port. In November 1994, the development project is finally getting underway. (See Volume XII of this LSRS Final Report for a complete discussion of this port, and the potential for expanding the interisland shipping services operated to Batangas Port.)

The discussion which follows also looks at the competitiveness of services on routes serving the northern islands, and identifies where insufficient competition had resulted, in 1993, in ferry and shipping service inadequacies.

Mindoro Island

Except for the need to expand and upgrade the port of

Batangas, the island of Mindoro has only one real need where shipping services are concerned, and that is the improvement of access to its north coast ports. The following is true:

- ▶ The port of Calapan has only a narrow two-lane road connecting it to the main Oriental Mindoro highway, and this access already constituted a severe bottleneck in 1993.
- ▶ The east coast highway was severed at more than one location by a typhoon, in December 1993, which destroyed or severely damaged bridges.
- ▶ The Occidental Mindoro highway, which links the southwestern coast port city of San Jose to the provincial capital of Mamburao and the ferry port of Abra de Ilog, was in very poor condition at the time of LSRS fieldwork, and the Department of Public Works and Highways (DPWH) had not yet scheduled upgrading of this road in 1994.
- ▶ The road which links the two provinces of Mindoro in the south (San Jose to Bulalacao) is a winding, low-standard road passing through marshy land, and effectively prevents access to Calapan from southern Occidental Mindoro.

The potential benefits of the north coast ferry services are being only partially realized, during 1993-1994, because of the poor access to these services for large portions of the island. In 1993, it was primarily two-thirds of the province of Occidental Mindoro which was being prevented from fully realizing the potential benefits of RORO ferry services, but after the typhoon damage caused to east coast highway bridges, in late 1993, two-thirds of the entire island of Mindoro had grossly inadequate access to the north coast shipping services.

In addition to improvement of access to the north coast ports, the quay at Abra de Ilog was in unrepaired condition, in 1993, and the same typhoon which caused damage to Oriental Mindoro highway bridges also, reportedly, damaged the quay at Calapan.

Finally, there is a general need throughout the Philippines to remove the barriers that prevent full realization by users of the benefits of RORO ferry services. These barriers are of three types:

- ▶ Arrastre contractors are permitted to impose charges on goods accommodated on trucks and other goods vehicles which move between ports aboard RORO ferries. In most cases no services at all are performed by the arrastre contractors, and even when minor services are provided,

they bear no real relationship to the level of charges imposed. A principal benefit of RORO services is that they eliminate the needs for cargo-handling at both the port of origin and the port of destination. When charges for arrastre services are imposed, despite the absence of significant services, portions of the potential benefits to RORO service users are lost to them. Shippers in the Philippines nevertheless generally favor the use of RORO services, especially for perishable commodities, because of the large time savings. In comparison to shipping cargo as breakbulk cargo, the RORO service shipment option also offers much improved cargo security.

- ▶ Whereas once trucks were prohibited from operating on other islands than the one on which they were registered, they only require "clearance", in 1993-1994, to move from one island to another. This need for obtaining clearance acts as a deterrent to developing and maximizing the use of RORO services, and the costs of obtaining such clearances reduce the benefits of RORO services to the shipper-users.
- ▶ Ferry operators are tenants of ports and should be treated as such by the port owner/operators. PPA requires ferry operator payment of fees upon entering and leaving ports, and the manner of making payment needs to be converted to monthly or quarterly arrangements, such as the payment of "rentals".

(Although the improvement of port access and the removal of barriers to the full realization by users of the benefits of RORO ferry services represent the principal needs for the improvement of existing shipping services to Mindoro ports, the LSRS is also recommending in Volume XI of this Final Report that the east coast port of Mansalay be developed for the institution of new RORO ferry services between Mindoro and the island of Tablas. Mansalay Port development might be undertaken by a private sector developer, or by a consortium which would include both the private sector and the municipal government of Mansalay.)

Marinduque

Prior to 1993, the RORO ferry operator serving Balanacan Port had no competition for the accommodation of road vehicles between Marinduque and Luzon, but the advent of RORO services at the port of Sta. Cruz resulted in an increase in vehicle accommodation from 54,000 tons at Balanacan only, in 1992, to 105,000 tons at the two ports the following year. This near doubling of vehicular-traffic, in a single year, suggests that the monopolized service had been imposing a capacity constraint up to that time. LSRS fieldwork on

Marinduque was carried out after there were already competing RORO services at the two ports, and shippers maintained that the constraint on vehicle accommodation had not yet been entirely removed. There remained a need, according to the shippers, to attract a different operator, with a larger RORO vessel, to serve the port of Balanacan, thereby enabling large goods vehicles to be moved between Marinduque and Luzon, and increasing the overall level of ferry operator competition. The LSRS endorses this view.

The NFA indicated in an LSRS interview that Marinduque and the islands of Romblon Province did not have adequate trucking services, in 1993, and another source indicated that trucks delivering cargoes to Tablas Island were frequently going in search of backhaul cargoes before again boarding the RORO liner vessel calling at Poctoy Port. Thus, these Sibuyan Sea islands may have some latent demand for RORO services that will only come into being when their respective road networks and trucking industries are more fully developed than they were in 1993.

Romblon Province

Despite the fact that vehicular traffic through Poctoy Port grew from 4,000 tons in 1991, to 10,000 tons and 14,000 tons, in 1992 and 1993, respectively, the island of Tablas had, in 1993, severe constraints which limited the growth of RORO ferry vehicle accommodation. As mentioned in the foregoing discussion of Marinduque, Tablas Island did not have either a well-developed road network or a well-developed trucking industry in 1993. Other constraints were:

- ▶ The RORO shipping service was monopolized, and both shippers and passengers attested to the adverse effects of route monopolization, i.e., capacity constraints, poor service standards (extending to operator staff disregard for users of all types), and high service charges.
- ▶ The port of Poctoy had severe constraints, including especially inadequate water depth, which created delays for both road vehicles and the RORO vessel.

(In 1993, there were no regularly scheduled services between the Romblon Province islands of Tablas and Sibuyan, not even motorized banca services. To travel or ship goods between Sibuyan and Tablas islands, it was necessary to utilize banca services between the Sibuyan port of Magdiwang and Romblon Port, and then between Romblon and the Tablas port of San Agustin. Banca charges for cargo accommodation were such as to practically price trade between Sibuyan and Tablas "out of the market". Volume XI of this Final Report considers the need for the introduction of new intraprovincial shipping services in Romblon Province.)

Masbate Province

Masbate Island is another island which had, at least as late as 1993, a road network which was in poor condition. Upgrading of Masbate Port was ongoing at the time of LSRS fieldwork, but the upgrading project did not include the provision of RORO berths at the port. In the draft Northern Islands Report, the LSRS took issue with this failure on the part of PPA and MARINA to jointly plan for the introduction of RORO services at Masbate Port. In 1994, however, the private sector "stepped in", and provided at least makeshift RORO berths at Masbate and Bulan, to enable RORO ferry services to be introduced on the Masbate-Bulan route.

Improvement of road access to Masbate Port is essential in order to make possible full realization by Masbate Island of the potential benefits of RORO ferry services, and it may also be necessary to provide second, and better-standard, RORO berths at both Masbate and Bulan.

Liner shipping connections for Masbate to both Manila and Cebu were competitive and being well operated, in 1993. Despite the charge, sometimes heard or read, that CISO constitutes a cartel, the LSRS found that wherever two or more members of CISO are serving the same route, services are generally performed well and there is evidence of competitive efforts being made by the operators. Such was the case, in 1993, when the LSRS surveyed the services of William Lines and Sulpicio Shipping on the Manila-Masbate route.

Catanduanes Island

The LSRS did not obtain very useful results from its passenger survey on the Tabaco-Virac route (see Chapter 4 discussion), but shippers on Catanduanes Island and in Albay Province viewed services between Tabaco and Virac to be inadequate for two reasons:

The route was monopolized. As a result, the operator was able to retain his 100 percent market share, despite the employment of an antiquated and unreliable RORO vessel, which moreover was incapable of accommodating large vehicles. (The operator's share of the Virac-Tabaco ferry service market might have been 100 percent, but the size of the market was diminishing as a result of the inadequate services. Large shippers had acquired their own vessels or had entered into charter arrangements with tramper vessel operators, and some small shippers were "piggy-backing" their consignments on the vessels owned or arranged for by the larger shippers. A few shippers were even opting for air cargo services. Much of this

converted traffic from ferry services is potentially reconvertible, so that the introduction of competition on the Virac-Tabaco route could create rapid growth of ferry cargo traffic. This is likely to be the case, especially, whenever a larger RORO vessel is franchised to serve the route.)

- ▶ Arrastre services at both Tabaco and Virac were unsatisfactory. Shippers characterized the pilferage at Tabaco as being "rampant". In 1994, PPA was still maintaining that the arrastre contractors installed at PPA's ports were not as bad as shippers and shipping operators were claiming. (In general, throughout the Philippine Archipelago, the LSRS found that both shippers and shipping operators were willing to commend arrastre contractors when they thought they had reason to do so.) In any case, the quality of arrastre services at Tabaco and Virac appeared to the LSRS to constitute one factor leading to shipper preference for RORO services on the route.

6. APPROACH TO IMPROVING SERVICE ADEQUACY

Institutional Responsibilities & Policies

For the most part, the northern islands could be assured of satisfactory domestic shipping services if MARINA, SHIPPERCON, and PPA were to fully implement policies and plans already announced or under consideration by them, and if shippers on the individual islands or island groups were sufficiently organized to deal effectively with their own needs. With regard to MARINA, SHIPPERCON, and PPA responsibilities, policies and plans, the following are adopted in theory, and to a limited extent in practice, or are under active consideration:

Monitoring of Cargo Services & Charges. There cannot be an LSRS conducted every year or every other year, so it is necessary that MARINA and SHIPPERCON develop a system of monitoring the adequacy of cargo services and the reasonableness of charges imposed for those services. Assistance could also be provided by PPA through the keeping of records on vessel adherence to port-call schedules, and submitting this information on a regular basis to MARINA.

The principal effort to monitor the adequacy of cargo services must be SHIPPERCON's because of the bureau's responsibility to all Filipino shippers to ensure that services provided to them are adequate and appropriate and charges are reasonable. SHIPPERCON has never carried out this role effectively where interisland shipments and cargo services are concerned, and a regional presence will be required if the bureau is to become effective in this regard in the future. In the short to medium term, such a regional presence might only be obtained by enlisting the assistance of Trade and Industry Regional Offices (TIROs) and Provincial Offices (TIPOs) to carry out SHIPPERCON monitoring functions outside of Manila.

For reasons discussed below, MARINA should know at all times what services are being provided on which routes. In 1994, MARINA receives much of this information a year after the fact, when operator annual reports are submitted, and even these reports are often incomplete, inaccurate, or unclear. Up-to-the-moment information on services actually being operated (rather than only being franchised to operate) should be obtained by MARINA's DSO from four sources:

- ▶ PPA vessel arrival and departure records, which might desirably be submitted by PPA to the DSO for all PPA ports on a monthly basis.
- ▶ SHIPPERCON monthly collections of shipper complaints,

some of which will have to do with failures to closely adhere to schedules.

- ▶ Maritime Regional Office (MRO) reports, which should also be monthly, on adjustments of service schedules on routes under their respective jurisdictions. (MARINA is already implementing a policy of decentralization of functions, which should make such report preparation by the MROs both possible and mandatory.)
- ▶ Quarterly shipping operator conference reports, identifying service adjustments of their members (see discussion of service schedule flexibility below).

In November 1994, the status of establishing effective cargo service monitoring and consultative mechanisms is:

- ▶ Both MARINA and SHIPPERCON are committed to the establishment of the Domestic Shipping Service Monitoring System (DOSSMONS), included in this report as Annex B of Volume I, and the LSRS also obtained through interviews favorable opinions on the establishment of DOSSMONS from the Visayan Association of Ferryboat and Coastwise Shipping Operators (VAFCSO), the Iloilo Shipping Operators Association (ISOA), and the Southwestern Mindanao Shipowners Association (SMSA).
- ▶ The Domestic Shipping Industry Consultative Council (DSICC) has been formed, with charter members including MARINA, SHIPPERCON, CISO, and the Distribution Management Association of the Philippines (DMAP). CISO indicated, in an LSRS interview, that it was the intention of the members to give the DSICC a regional presence by inducing other shipping conferences and shipper associations to join.
- ▶ Regional Shipper Associations (RSAs) have been established, with assistance from SHIPPERCON, at Cagayan de Oro, Davao, General Santos, Zamboanga, Cebu, Iloilo, Legaspi, and on the island of Marinduque.

Monitoring of Passenger Services & Charges. MARINA will receive no assistance from SHIPPERCON or TIROs and TIPOs on the monitoring of passenger services, but the PPA monthly vessel arrival and departure records would keep the DSO informed of most regularly scheduled passenger services, including the degree of schedule adherence of such services. For MARINA to be aware of other aspects of service standards, however, it will be necessary for MARINA staff to evaluate liner shipping and ferry passenger services from time-to-time. The Passenger Service Rating System (PSRS), an LSRS output which does not constitute any portion of this Final Report, provides a means of doing this.

Service Schedule Flexibility. However good MARINA's domestic shipping database and MARINA staff analytical capabilities might become in the future, MARINA will never be able to calibrate the balance of demand and supply of shipping services, including seasonal and (for ferry services) daily and hourly demand-supply balances, as well as any imbalances of supply and demand could be responded to by a shipping industry which has a measure of flexibility in its service scheduling. Limitations on the extent of service schedule flexibility are mainly "truth in packaging" (i.e., services posted should be the services provided) and avoidance of port congestion due to "bunching" of vessel calls.

The LSRS recommends the following in regard to liner shipping and ferry service schedule flexibility:

- ▶ That ferry operators not be restrained from adjusting service schedules to meet fluctuations in demand, and that their franchises be amended, in fact, to require that they respond to demand levels, to whatever extent it may be reasonable to expect that they are able to do so.
- ▶ That MARINA continue to permit a degree of flexibility in liner shipping scheduling and that such flexibility be incorporated into any new route franchises.
- ▶ That, however, MARINA undertake to identify cases of liner shipping schedule deviations in the absence of advance posting to advise all shippers and passengers of the actual schedule to be operated, with MARINA giving warnings to operators, who fail to post advance notification of schedule change, that their franchises are liable to suspension or revocation if postings of intended adjustments of service schedule are not given.

Franchising of New Services. MARINA's MC 71 and MC 80 (issued in October 1992 and November 1993, respectively) established a change of route franchising philosophy, from primary concern for existing operators to primary concern for the adequacy of shipping services to meet shipper and passenger demand. During the first two years of MC 71 effectiveness, a number of new franchises were issued on the basis that applicants were offering a technology and service standard not formerly available on the routes for which they were applying for franchises. These cases might be regarded, however, as "easy", in that the technology differentials between what existed and what the applicants were offering were readily observable. The more difficult applications of MC 71 and MC 80, requiring some evaluation expertise on the part of MARINA staff, will be when the vessel technology, condition, and size do not greatly differ, and what is being offered is a management differential.

Specific LSRS recommendations for new franchising on existing

routes are made in this Final Report on the basis that: (i) existing vessels on a route are not entirely satisfactory for meeting demand, i.e., either one or more vessels on the route are in poor condition, or their combined capacity is insufficient, or some new type of capacity might usefully be provided; or (ii) management of existing services is not entirely satisfactory, i.e., service standards and/or market responsiveness are poor, as is generally the case with monopolized routes and is only rarely the case on competitive routes.

The LSRS is making the following institutional recommendations in regard to the franchising process:

- ▶ That MARINA become cognizant of the options for services, including the introduction of liner shipping and ferry services to public and private ports which are not in the PPA system. For example, Atlantic Gulf & Pacific Corporation (AG & P) has good port facilities in Batangas Bay, and has applied to PPA (in 1992) to be permitted to accommodate third party cargoes, i.e., to become a common-user port. Use of this port would offer immediate opportunities for franchising new interisland services, that otherwise could not be franchised until implementation of the Batangas Port development project is fairly advanced. A general consideration in franchising services might be that it is often useful to serve a market by franchising parallel routes, i.e., routes that do not operate to exactly the same pair of terminals. In this manner, the port terminals at one or both ends of parallel routes become part of the competition.

- ▶ MARINA and PPA establish regular working meetings to discuss port development priorities and the expanded utilization of heretofore dedicated (industrial) private ports. The Presidential Task Force (PTF) on Interisland Shipping identified in its April 1989 report that there was a need for greatly improved coordination between port system development and shipping industry development, yet more than five years later that improved coordination does not yet exist. DOSSMONS extends to the establishment of these MARINA/PPA regular working meetings, but, in November 1994, PPA has yet to endorse DOSSMONS, or to commit itself to otherwise developing a close working relationship with MARINA.

Once MARINA has identified shipping service needs, and has coordinated with PPA to ensure that specific ports will be capable of effectively and efficiently accommodating new shipping services, MARINA might desirably become proactive in inducing the private sector to submit franchise applications to provide all necessary

services.

Port Infrastructure & Operations Improvement. All cargo handlers at PPA ports should be selected through local or international competitive bidding and their investment proposals and intended charges for services should constitute two of the prime criteria by which a winning bidder is selected. The contracts subsequently entered into should contain performance, penalty, and termination clauses. PPA indicates, in 1994, that it has been using this approach to enter into its contracts with cargo-handlers. What PPA does not appear to be doing effectively, however, is to monitor and enforce all of the clauses in its contracts with arrastre contractors. The introduction of competition at ports is a PPA policy, and a desirable one, but it can only be implemented over a period of several years (as existing contracts, some of which extend beyond the year 2000, expire), unless PPA were to take the necessary steps to force early termination of the contracts of those arrastre organizations that are performing poorly.

Action Plan for Northern Island Shipping Service Improvement

Specific actions that are needed to improve liner shipping and ferry services of the northern islands are identified and briefly discussed below, by island or island group. These actions do not extend to the initiation of services on routes not now operated, which is a concern of other volumes of this LSRS Final Report.

Mindoro

The principal actions that are needed to improve Mindoro ferry services are:

- ▶ **Implementation of PPA's Development Plan for Batangas Port.** After a lengthy delay, this project got underway in late 1994. The LSRS understands from PPA that all phases of the development program are to be implemented without interruption to bring the overall development program for the port back on schedule.
- ▶ **Improvement of Abra de Ilog Port Facilities.** Considering the rapid traffic growth at this port in 1992, and the potential of the port to serve most of the cargo and passenger traffic of the entire province of Occidental Mindoro, upgrading of the port should be accorded high priority. Advertising for upgrading on a build-operate-transfer (BOT) basis should be considered, if the upgrading project could not otherwise be implemented

during 1995.

- ▶ **Upgrading of the San Jose-Mamburao-Abra de Ilog Road.** Even the southern extremity of Occidental Mindoro would be well-served by Abra de Ilog if the west coast highway of Mindoro Island were upgraded to good, paved condition; Batangas would then be just 6 hours away for passengers and cargoes from the San Jose vicinity, with several times a day ferry services between Batangas and Abra de Ilog.
- ▶ **Improvement of Land-Side Calapan Port Access.** Poor road access to the port is a common complaint of users, and the congestion problem will only worsen as cargo and vehicular traffic grow.
- ▶ **Incorporation of Service Schedule Flexibility Within Ferry Service Franchises.** Any of the ferry operators should be permitted to add an extra voyage whenever desirable to do so in order to satisfactorily accommodate all demand, and a "Spring" and/or a "December" schedule may be in order, especially on the Batangas-Puerto Galera and Batangas-Abra de Ilog routes (which appear to have more pronounced peaks than the Batangas-Calapan ferry route). The "basic schedule" should then be designed to easily permit the addition of a third round-trip voyage when such is needed (round-trips, including 30-minute turnarounds at both termini require between 4 and 5 hours on the Batangas-Puerto Galera route and approximately 6 or 6.5 hours on the other two routes).

Provided that all of the foregoing actions are taken to improve Mindoro ferry services, little or no additional actions will be required to improve the island's liner shipping services since: (i) nearly all traffic between Mindoro and Luzon will move by ferry; and (ii) Batangas will become the principal liner shipping port for Mindoro as well as for the Cavite-Laguna-Batangas-Rizal-Quezon (CALABARZON) development area.

Marinduque

Although 1993-1994 ferry services are more-or-less adequate to meet demand, additional capacity on the Sta. Cruz-Dalahican route will soon be needed, probably both for passengers and cargo vehicles. This does not necessarily mean franchising another operator or requiring the current RORO operator to place another vessel on the route. Increasing capacity by adjusting the schedule to two round-trips daily or just on certain days (requiring an 18-hour operating day, and two crew shifts) would relieve any short-term capacity constraint.

Catanduanes

A second, larger RORO vessel is required to serve the Tabaco-Virac route, or the vessel might preferably be placed in the parallel Tabaco-San Andres route, provided that San Andres is equipped to accommodate such a vessel satisfactorily. The LSRS understands that the RORO vessel which had been (up to the time of the LSRS survey) unreliably performing services between Tabaco and Virac, due mainly to recurrent engine trouble, has since been re-engined. Presumably this will largely correct the past problem of service unreliability. Shippers have also argued, however, for a vessel with a higher vehicle-carrying capacity, and for an end to the RORO service monopoly, so that a second vessel on a different, yet competing route appears as the best option; this conclusion, however, is before taking into account possible port RORO vessel accommodation constraints at San Andres. MARINA and PPA need to confer on the additional RORO vessel accommodation options.

Romblon Province

A second liner operator should be franchised to serve the Odiongan-Batangas route. The services of the existing operator are wholly unsatisfactory, and the operator overcharges, as well. This operator, however, responds fairly well to competition, and the franchising of a second operator would probably, therefore, have the dual effects of adding desirable capacity and, indirectly, upgrading existing services.

Dredging of Odiongan Port is reportedly required if vessels able to accommodate heavy vehicles are to be able to enter, load, and depart the port at all times.

Masbate

Shippers in Masbate identified a need to increase Masbate-Bulan ferry capacity, but did not indicate a preference for RORO ferry services. In 1994, however, RORO ferry operations between Masbate Port and Bulan were introduced, but without a well-designed RORO berth at either port. The LSRS recommends that MARINA and PPA confer on the possibility of adding a second, and better designed, RORO ferry berth at both Masbate Port and Bulan.

PORT OF BATANGAS



RORO vessels at berth and cargo vehicles lining up to board the RORO ship.



Passenger accommodation onboard the RORO vessel.

ANNEX A

RESULTS OF NORTHERN ISLANDS CARGO SERVICES SURVEYS

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Introduction

Shipper surveys were conducted by the LSRS in the Northern Islands, including in both provinces of Mindoro Island, and on the islands of Catanduanes, Marinduque, Romblon, Tablas, and Masbate. Surveys were also conducted in the Bicol Peninsula province of Albay. Surveys were conducted during May-June, 1993.

These surveys aimed at identifying any problems and constraints with regard to shipping services, and the causes and the consequences of such problems and shipping services constraints. The survey team covered more than forty shippers/traders, five shipping operators, seven arrastre contractors, government agencies such as the Philippine Ports Authority, the Department of Trade and Industry, the National Food Authority, the Department of Agriculture, the Office of the Governor, the Romblon Provincial League of Governors, the People's Economic Council, and various shipper associations in the northern islands.

Oriental Mindoro

Calapan

The shipper survey was undertaken on board the RORO vessel bound for Calapan and on the return trip to Batangas, considering that the majority of the traders and shippers were based in the different municipalities of Oriental Mindoro, and did not maintain an office or store in Batangas.

The twelve shippers interviewed were mainly traders based in the municipalities of Socorro, Pinamalayan, Gloria, Roxas, Mansalay, Bansud, Bongabong and Bulalacao. These shippers mainly utilized the RORO vessels in the Batangas-Calapan route in transporting their produce from these municipalities to the Batangas and Metro Manila markets.

According to the shippers, shipping services play a crucial role in the trade of agricultural produce and the mobility of people and they welcomed the introduction of RORO vessels in 1980, with the improvement of Calapan port's berthing facilities. While allowing for higher cargo movement per trip, these vessels reduced the demand for arrastre services and storage facilities, as cargo trucks were able immediately to carry to and from the vessels.

They had no problems with the schedule of vessels and the average travel time for the Calapan-Batangas route was approximately 2.5 hours.

Rice Shippers

A shipper of rice was shipping about 30 sacks from the municipality of Baco to Calapan port bound for Batangas once a month. He was paying arrastre of P80 at Calapan port (a one-time collection consisting of P40 for Calapan port and P40 for Batangas port). He was charged a freight rate of P340 for the cargo jeep.

The traffic congestion on the national highway providing access to Calapan Port was resulting in delays in meeting the vessel schedules. When delays occurred, shipments were then accommodated in the next vessel, considering that there were three or four daily vessel trips between Calapan and Batangas. Shippers had no complaints as regards adequacy of shipping services in the Batangas-Calapan route since the different vessels serving the route could adequately serve the large volume of cargo jeeps and trucks from Calapan Port. RORO service had tremendously contributed to rice trading activities in Oriental Mindoro, with the influx of traders from Batangas.

However, Viva Shipping Lines, which used to give free passage to at least two passengers who boarded RORO vessels with cargo vehicles, was, in May 1993, charging passenger fares to drivers and their assistants. The shippers considered these fares as additional expenses, i.e., P80 per passenger, for round-trips. Shippers were informed by Viva Shipping Lines that this was in accordance with MARINA's ruling that free passage would no longer be given to passengers of vehicles on board RORO vessels.

Another shipper based in Calapan was shipping 50 cavans of rice to the Cainta Market in Manila about 8 times a month. The shipper was buying rice at P400-P450 per sack from nearby municipalities and was selling the rice in Manila at P600 per sack. He preferred to use scheduled RORO vessels over conventional cargo vessels, used in the early 1980s, because of the faster and more efficient cargo transport and handling. Shippers utilizing cargo jeepneys were encountering a problem of limited space for cargo jeeps because of the large numbers of cargo trucks on the Batangas-Calapan route. During peak season, most vessels were fully loaded.

The shippers sometimes experienced delays in vessel departure because of engine trouble but this was not a usual occurrence. RORO rates charged by the shipping lines were considered to be reasonable, and the services to shippers to be adequate. However, the shippers complained of the indifferent and arrogant attitude of vessel crews of Viva Shipping Lines to shippers and passengers alike.

One shipper-farmer based in the municipality of Bansud was selling about 80 percent of his palay production to traders, at a pick-up price of P5.80 per kilo. He said that he was able to directly ship out his produce to Batangas because of the efficient land and water transport connection, although he preferred to sell his rice to traders during harvest season. During the lean season, he was selling about 100 sacks of milled rice, at P450 per sack, to traders who bought from various millers and then transported the rice to Manila.

The National Food Authority (NFA) in Batangas indicated that there were only a few movements of rice from Calapan to their NFA warehouse in Batangas since rice production in Oriental Mindoro was being shipped out by traders from Batangas. NFA was paying a shipping rate of P6 per bag from Oriental Mindoro to Batangas based on a canvass of offers.

Fruits and Vegetables Shippers

It was learned that large quantities of bananas and citrus, the major fruits grown in the different municipalities of Oriental Mindoro, were being transported to Metro Manila and other provinces. Fruit production and marketing offered the highest income potential for farmers. However, due to lack of storage facilities, the farmers were forced to sell their produce immediately, thereby reducing the possibility of getting a higher price.

One trader was shipping about 6 metric tons of bananas from the municipality of Bansud about twice a month during peak season, and had hired a cargo jeep bound for Manila via Batangas at the rate of P3,300 per trip. One shipment of bananas (saba variety) of 6,000 kilos (a kilo constituted about 10 bananas) was valued at P21,000 computed at P3.50/kilo. Bananas (saba variety) were being sold in Manila at P0.80 per piece or P8.00/kilo.

Another shipper of bananas based in the municipality of Baco was paying transport hire of about P2,500/trip for transporting bananas to Manila with one load consisting of 50,000 pieces (5 mt). On the other hand, a shipper of bananas from the municipality of Naujan hired a cargo jeep at P3,500 per trip. Transport rates depended on the distance of these municipalities from Calapan and whether the shipment was being transported directly from the farm or from the market.

A shipper of bananas based in Calapan was shipping about 5 metric tons of bananas (saba and lakatan varieties) twice a month to Manila. In some cases, he shipped bananas together with other agricultural products; such as calamansi, rootcrops, mangoes and papayas. There were four traders from the municipality of Pola who shipped the same agricultural products growing in that municipality

about twice a month.

Another agricultural product commonly being shipped, in May 1993, was calamansi which was being bought by traders at P80 per small basket (batibot, with 150-200 pieces), or at P400 to P600 per medium-size basket (1,000-1,200 pieces), or a "bulldozer" basket (1,600-2,000 pieces) costing more than P1,000 each. However, shippers indicated that the price of calamansi was fluctuating from day to day. A shipper in Naujan hired a cargo jeep to ship citrus products to Manila for P 1,200 per trip or P80 per basket.

Gabi, a rootcrop variety, was being bought at P35 per bundle while other fruits like papaya and mango were being bought at P50 per sack and P40 per sack, respectively. Considering the low buying prices, and the high selling prices in Manila, their revenues could easily cover their transportation and marketing costs.

There were about 50 traders (viajeros) from the municipality of Roxas who were shipping 5 to 8 tons of various fruits and vegetables (bananas, watermelon, jackfruit, calamansi, rootcrops, etc.) each day destined for Manila. Six shippers who were interviewed by the LSRS said that they had no problems with shipping capacity. A cargo jeep was being charged a freight rate of P340 by Viva Shipping Lines, whereas the MV Diamond vessel of Manila International Shipping Lines was charging only P300 per cargo jeep.

A farmer/trader based in Bulalacao usually shipped ginger during the months of March to May to Batangas in the amount of about two metric tons, together with other rootcrops. He said that the crew of Viva Lines did not look after the security of shipper cargo consignments, and the shippers were therefore compelled for security reasons to stay in the cargo jeeps for the duration of the voyages. He likewise was harvesting watermelon, melons and corn in the second cropping season and the produce was then being brought directly to Manila.

Pick-up prices of agricultural products vary by municipality, as indicated in Table A.1.

Fishery Products Shippers

Fishery products were mainly being shipped out by fish traders who were buying their fish catch from fishermen at the fish landing areas in the different municipalities of Oriental Mindoro. Buying prices of fish were P10 to P20 per kilo and the fish were being sold to Manila buyers at P40 per kilo. A fish trader from the municipality of Bulalacao was shipping about twenty styrofoam boxes or a total of 1 ton twice a week. There were fishery products being brought to the municipality of Bulalacao from Coron,

Table A.1
Buying Prices of Agricultural Products
(Pesos per Kilo)

Crop	Municipalities of Oriental Mindoro			
	Bansud	Bongabong	Baco	Naujan
Palay	5.00	-	5.50	
Coconut	4.00		4.00	
Banana	4.00	.45/piece	2.00	.30/piece
Mongo	4.00			
Corn	4.00	6.00		
Ginger	5.00	10.00		
Pepper	5.00			
Starapple	-	5.00		
Rambutan	-		8.00	
Black pepper	-		30.00	
Lanzones	-		12.00	
Rootcrops	-		60.00/sack	3.00
Mango	-	200.00/basket		
Peanut	-	400.00/sack		

Source: Interviews with shippers

Palawan by small fishing boats, and these shipments were then being transported by land to Calapan port (4-hour trip), shipped on a RORO vessel to Batangas (2.5 hours) and then transported to Manila (2-hour trip).

Three shippers of fishery products indicated that the cargo jeeps loaded with fishery products were being given low preference for space allocation inside the RORO vessel by Viva Shipping Lines because of the strong odor of fishery shipments, particularly during peak season, but they nevertheless could be accommodated in the next vessel, considering that the RORO vessel had a capacity for 60 jeeps. Transport hire for a cargo jeep loaded with about 5 tons of fishery products was P5,000 per trip.

Shippers experienced no delays in arrival and departure of vessels. They complained of Viva Shipping Lines' new policy, instituted on June 1, 1993, of charging all passengers of cargo vehicles (including the driver of the vehicle) passenger fare, whereas the driver and an attendant had previously received free passage. Shippers were therefore being penalized if found not to have bought passenger tickets when there were ticket inspections by the vessel crew. A passenger ticket on-board cost double the standard price.

Another shipper of fishery products hired a ten-wheel truck which could carry about 35-40 tons and was charged a rolling freight rate of P1,800. The shipper indicated that the benefits of introduction of RORO vessels were the reduction of vessel time in port and the elimination of double-handling of cargoes. Further, with a conventional passenger/cargo vessel, sailing time on the Batangas-Calapan route was about 5-6 hours in the 1970s, whereas the RORO vessel, in May 1993, required only 2.5 hours.

There were about 20 cargo jeeps transporting fish from the municipality of Mansalay, each loaded with about 8 tons of fish per trip, and these jeeps were charged a rolling freight rate of P550. The fish shippers found the shipping services to be adequate and efficient, although the road access to the port of Calapan was poor. The limited road capacity of the national highway caused traffic congestion at the port entrance, and hence compounded their difficulty in meeting the departure schedule of the RORO vessel. The PPA and the arrastre operator were trying to work out a traffic rerouting plan, even inside the pier, in order that the vehicles parked (passenger buses, jeepneys, tricycles, etc.) for arriving passengers would not cause traffic problems.

Shippers and vehicle owners indicated that there was a problem of leaving the vessel upon arrival at the ports of Batangas and Calapan, because of the mix of passengers and cargo jeeps, which resulted in traffic congestion and sometimes injury to passengers. The shippers considered that Viva Shipping Lines should initiate a systematic disembarking procedure for passengers and cargo

vehicles.

The port of Batangas had limited road capacity for all cargo vehicles that were leaving and entering the port. PPA Batangas had a development plan to be implemented on the condition that the squatters living near the port could be relocated. With rapid traffic growth on existing routes, and possibilities for new interisland services there was a real need to expand the berthing area of the pier for both domestic and foreign vessels.

Arrastre Operator

Based on an interview with the arrastre operator in Calapan, Oriental Mindoro, Calapan Labor Service Cooperative, Inc., cargo jeeps and four-wheelers comprised 62 percent of the vehicular traffic, 6-wheeler and larger cargo trucks (10, 14 and 18-wheelers) represented 16 percent, and private vehicles comprised the remaining 22 percent. A lot of the cargo jeeps were loaded with fishery products in styrofoam boxes from the municipality of Bulalacao, and with calamansi, which originated from the municipalities of Pinamalayan, Roxas and Pola.

They noted that the congestion in the port occurred because of the mix of cargo vehicles, tricycles and passenger jeepneys which were parked waiting for disembarking passengers. Ten-wheel trucks had problems in entering the port because of the narrow highway connection with the port of Calapan, resulting in delays and heavy traffic. The PPA operations personnel were currently studying a possible traffic plan that could ease the flow of traffic in and out of the port. They said that they were not consulted by the consultants of the Fourth IBRD Ports Project, in 1985, as to the design of the port, and that the design should have taken into consideration the port's narrow entrance.

The arrastre operator indicated the possibility of charging freight by measuring the height and length of vehicles to replace the standard rates for vehicles, classified as to vehicle type. Table A.2 indicates the RORO vehicle transport rates in the routes Batangas-Calapan and Batangas-Puerto Galera. Table A.3 indicates the arrastre and port charges at the Port of Calapan.

Shipping Operator

The Viva Shipping Lines manager indicated that the port of Batangas was becoming congested, and that he had had problems with the lack of RORO berths for the company's new vessels. To solve the problem of inadequate berthing capacity of the port, he funded the construction of three RORO ramps costing him P800,000 each, or a total of P2.4 million.

Whenever there was problem with shallow water depth at any of the ports of call of its vessels, Viva Shipping Lines was

Table A.2

RORO Vehicle Transport Rates, 1993

	Batangas- Calapan	Batangas- Puerto Galera
Automobiles	P 380	P 267
Land Cruiser	430	303
Trooper	430	303
Land Rover	430	303
Mini-Ace Pick-up	430	303
Hi-Ace Pick-up	500	353
Van	570	404
Coaster	970	686
Tamaraw/Fiera	360	252
Pick-up	500	353
Owner Type Jeep	300	244
Passenger Jeep (short)	300	244
6-Wheel Truck (Mini)	570	404
6-Wheel Truck (Reg.)	800	575
6-Wh.Truck (Long Body)	900	646
6-Wh.Dump Truck	960	681
10-Wheel Truck	1,920	1,362
10-Wheel Dump Truck	1,280	908
14-Wheel Trailer	2,560	1,816
18-Wheel Trailer	3,700	2,624
Passenger Bus (Big)	1,280	908
Passenger Bus (Mini)	1,050	747

Source: MARINA's Domestic Shipping Office

Table A.3

Port of Calapan Arrastre & Port Charges, 1993

Rolling Cargoes 1/		VAT	Wharfage	Total	
Private Vehicles					
- Non-Cargo	P 22.00	2.20	4.00	28.20	
Cargo Jeep					
- 4 wheeler	55.00	5.60	16.50	78.10	
- 6 wheeler	113.00	11.30	33.00	157.30	
Cargo Truck					
- 6 wheeler	211.00	21.10	62.00	294.10	
- 10 wheeler	423.00	42.30	124.00	589.30	
- 14 wheeler	493.00	49.30	144.50	686.80	
- 16 wheeler	564.00	56.40	165.00	785.40	
		Non-Palletized		Palletized	
		Arrastre	Stev.	Arrastre	Stev.
General Cargo					
Non-Prime Cargoes (RT)	56.70	14.75		44.20	10.05
Cargoes in Kaings (MT)	88.15	22.15		68.70	17.10
Prime Commodities (RT)					
Rice	24.00	5.95		18.70	4.70
Palay	24.05	6.05		18.75	4.80
Milk	36.05	9.00		28.10	6.10
School Supplies	39.30	9.90		30.60	7.00
Edible oil	37.10	9.30		28.90	6.60
Sugar	44.90	11.35		34.95	8.05
Corn	25.25	6.35		19.70	4.50
Canned Fish & Eggs	56.70	14.15		44.20	10.05
Live Animals					
Crated (RT)	87.80	21.90			
Uncrated (Per head)	8.50	2.15			
Lumber (1000 Bd.Ft.)	43.30	10.85			
Vehicles (RT)	83.35	20.75			
Heavy lift Cargo (MT)					
5 to 15 tons	39.25	9.90			
Over 15 to 20 tons	70.90	17.75			
Over 50 tons	74.05	18.50			

1/ These were one-time RORO charges collected only at the port of loading (Calapan) which covers as well the arrastre/port charges at the port of unloading (Batangas). The break-bulk cargoes, however, pay separate arrastre and port charges at the ports of loading and unloading.

shouldering the cost of dredging to enable its vessels to dock. The manager said that port development should complement the development of shipping services, but that this was not always the case.

He indicated that the other operator in the Batangas-Calapan route might pull out because of financial difficulties and he therefore saw the need to deploy another vessel. Likewise, there was a need to provide shipping services on other routes, and he was considering deploying a new vessel in the Batangas-Roxas-Estancia-Cebu route. However, he was finding the acquisition cost of vessels to be prohibitive, viz., about US\$1.5-2.0 million for a 9-11 year old RORO vessel from Japan. The approved cargo and passage rates of MARINA, on the other hand, were considered very low by the manager, and he thought that he might not have sufficient income to maintain the vessels or to pay off their loan obligations. Deregulation, he believed, should include freight rates, and not only shipping routes.

Further, the manager believed that MARINA should ask for a reasonable number of requirements from the operators and not burden them, particularly the ferry operators. Ferry operators, he argued, should be distinguished from interisland operators, who should be given stricter requirements. Drydocking expense alone was too high, costing him about P3 million per vessel for 15 days. He did not agree with MARINA's regulation of allocating 50 percent of passenger capacity to third class for ferry services, and recommended that there should be only ordinary class and first class services.

He indicated that, during peak season, there was a need to deploy more vessels and not solely to increase the frequency of vessel schedule, and MARINA must be flexible with this kind of policy. In May, 1993, Viva's RORO vessels in the Batangas-Calapan route could accommodate 700-1,000 vehicles per day.

There was also a problem with the heavy load of cargo vehicles, e.g., with excess cargoes being placed on top of cargo jeepneys. A cargo jeep was supposed to load 5 tons of cargo at a maximum, but most often the operators were overloading the jeep to about 8 tons. The ferry operator was having a problem with some of the shippers who were using the long-body jeepneys to carry more cargo, because they insisted that they should be paying the standard jeepney rate for RORO service, since their vehicles were certainly "jeepneys" in appearance.

The manager of Viva Shipping Lines pointed out that ten-wheel trucks were likewise being overloaded; when these vehicles were carrying 35-40 tons of cargo, and passed over the ramp of the vessel, the hinge of the ramp might break, and this had already happened on one occasion a year earlier. Thus, it would be desirable if the shipping authorities would institute a policy to

limit the loads of RORO-accommodated vehicles, in order that safety would not be compromised. The MARINA should therefore look into and monitor the shipper malpractices which the shipping operators had no control over. There was a proposal with MARINA to charge vehicles freight rates based on their lengths.

Viva Shipping Lines had no intention of providing service in the Batangas-Mamburao route, since such a service would require a much larger vessel because of the big waves at Calavite Point. Considering the limited potential for passenger and cargo traffic on that route, the high cost of maintaining a larger vessel, and the poor condition of the existing port facility at Mamburao, it would not be a wise decision for an operator to invest in a vessel for that route. Instead, he was trying to develop the Batangas-Abra de Ilog route, and hoping that PPA or the local government at Abra de Ilog would construct a new RORO ramp to replace the damaged ramp being utilized there in May 1993.

Puerto Galera

The shippers/traders from Batangas were buying copra, handicrafts and bananas from Puerto Galera and selling these products in Manila. The locally-based traders were buying vegetables, rice, dry goods (soap, canned goods), cement and construction materials from Batangas for the local population and tourists. A shipper of a jeepload of wooden handicrafts had been shipping twice a week via Batangas to Manila and was hiring a jeepney for P3,000 per trip, and paying a P340 freight cost for vehicle accommodation on the RORO ferry. He had no complaint in regard to the services of Viva Shipping Lines; there was not much RORO vehicular traffic in the route, and the shipper was therefore finding the service to be adequate even during the peak season.

Shippers of dry goods also had no complaint regarding the shipping services in the Batangas-Puerto Galera route. They indicated that they preferred to use the RORO vessel of Viva Shipping Lines because it was faster and safer than the wooden-hulled vessels of the other operator, AC Shipping. However, two shippers indicated that they preferred the services of AC Shipping since they were being charged lower freight rates for breakbulk cargo, and the vessel was docking at the municipal port inside the town. The vessel of Viva Shipping Lines was docking at another municipal port outside the town proper, and shippers had to hire a tricycle to bring their goods into the town.

AC Shipping had been operating in the Batangas-Puerto Galera route since 1975, and the manager complained about the stiff competition from Viva Shipping Lines, since that shipping line had started operating in 1992. AC Shipping had three passenger/cargo vessels with cargo capacity of 70-100 tons. The operator noted that Viva Shipping Lines had not submitted to MARINA's

classification requirements, and that it was transacting business directly with the Manila office of MARINA, and not the Maritime Regional Office (MRO) in Batangas. Further, AC Shipping alleged, Viva Shipping Lines did not reach a compromise agreement (on service schedules) with the other operators in the Batangas-Puerto Galera route, since the arrival and departure schedule of its vessels tended to change according to passenger demand during the day. Viva was also deploying an additional vessel in the Batangas-Calapan route without first obtaining MARINA's approval.

Another shipping operator in the Batangas-Puerto Galera route, Sikat Express, was catering only to tourists arriving from Manila, who were on package tours. A package tour with travel agencies cost about P520 per passenger, which included transportation fare from Manila to Batangas, from Batangas to Puerto Galera, and return via the same route.

Table A.4 presents a summary of the cargo traffic in the ports of Calapan and Puerto Galera via Batangas.

Occidental Mindoro

In general, the shippers based in Occidental Mindoro complained about the problems with the shallow water depth of Tayamaan Port, particularly during low tide. The port is located at the capital town of Mamburao.

As per discussion with the provincial government officials at the Office of the Governor, a tremendous amount of investment would be required to dredge the port and to construct a breakwater. They indicated that it was their preference to improve the port of Abra de Ilog, instead, considering that it already could accommodate the large RORO vessel serving the Batangas-Abra de Ilog route. However, such a plan had to be complemented by the development of a good road connection between Abra de Ilog and Mamburao, as well as with other Occidental Mindoro municipalities to the south of Mamburao.

According to the government officials, the existing gravel roads became impassable during rainy months, and would have to be improved to paved and all-weather condition, to facilitate movement of both cargo and passengers in and out of the port of Abra de Ilog.

Further, the RORO ramp would have to be improved to replace the improvised RORO ramp that was then being used at the port, and which was in damaged condition.

Further, the Planning Development Officer noted that the port required a breakwater, considering the occurrence of strong wave

action during the months of November to March. There was no arrastre operator based in the port, but each shipper was being charged P50 by the local government for the maintenance of the pier.

According to the Office of the Governor, Occidental Mindoro still lacked basic infrastructure, in 1993. The Provincial Government was prioritizing the use of local development funds for the construction of an all-season road network. In 1993, there were still problems of periodically impassable roads, fallen or dangerously weak bridges, flooded sections of road, and, for most of the province, uncertain access to the ferry port of Abra de Ilog.

In regard to the province's planned agro-industrial development, the local government was intending to tap the existing cooperatives for livelihood assistance. An industrial estate was being planned at Sta. Theresa in the municipality of Magsaysay, and that would be provided with a port facility to be operated by the local government. All these development projects depended, however, on the availability of local funds.

Grains

Three shippers of rice and copra (in addition to the Office of the Governor) indicated that there was a the problem of early departure of the RORO vessel of Viva Shipping Lines on its second trip in the afternoon; its scheduled departure was 1800 hours, but the vessel was usually leaving at 1730 hours. Passengers were likewise inconvenienced with such a practice.

The trucking cost of a cavan of palay or rice from Mamburao to Batangas was P25. A six-wheel truck which transported rice could usually carry 200 bags of 50 kilos each. NFA Mamburao noted that there had been an increase in rice production in Occidental Mindoro due to the use of high-yielding and fancy varieties of palay. NFA was shipping its rice or palay procurements in Mamburao through Tayamaan Port, and loaded its shipments on chartered cargo vessels. However, these vessels had to wait for high tide before they could load their rice shipments of 300 to 500 bags, due to the shallow water depth at the port.

Milling capacity in Mamburao was considered by the NFA to be short of requirements, and NFA could only buy and ship palay to Batangas for milling. NFA Mamburao was encountering a problem in the chartering of cargo vessels for its palay shipments because of the low freight rates that NFA offered.

NFA Mamburao was not using the ferry that called at the port of Abra de Ilog and served the Batangas-Abra de Ilog route, because the loading time for a RORO vessel was too short, i.e., the RORO ferry had a turnaround time of only 30 minutes. The first trip

Table A.4
Major Commodities Shipped via Batangas, 1992
(in metric tons)

Commodity	Calapan		Puerto Galera	
	In	Out	In	Out
Vehicles	187,089	171,159	2,065	2,514
Fertilizer	9,949	78	33	6
Coconut oil	6,567	64	3	-
Cement	17,635	65	854	171
Wheat	2,180	58	-	9
Fruits/Veg.	2,414	56,130	100	298
Sugar	2,601	41	106	2
Animal Feeds	6,770	3,560	153	61
Bottled Cargo	21,483	586	371	28
Refined Petrol.	1,107	21	13	1
Live Animals	529	5,730	7	219
Fish prep.	271	3,502	30	22
Palay/rice	578	33,568	68	168
Corn	82	2,307	-	25
Copra	488	20,708	192	2,076
Lumber	218	2,520	51	23
Other Cargoes	63,768	56,909	2,315	1,622
TOTAL	323,729	357,006	6,361	7,245

Source: PPA Statistics, 1992

arrival at Abra de Ilog was 0900 hours, and the vessel departed at 0930 hours. In the afternoon, the vessel arrived at 1700 hours and left the port at 1730 hours.

For their shipments destined for Bauan, NFA complained of the slow loading and unloading at that port. They claimed that the arrastre operator charged extra for their vessels by about P100-300, in addition to the standard arrastre and stevedoring charges which NFA had to pay for having their cargo unloaded.

At certain times, the NFA was using the municipal port of Sablayan, located on the western coast of Mindoro Occidental (in cases where NFA Batangas needed additional stocks during the lean months). NFA Mamburao was shipping about 500-1,000 bags per shipment on the regular wooden-hulled passenger/cargo vessel of Viva Shipping Lines that was serving the Batangas-Sablayan route. NFA was shipping about 150,000 bags annually, and shipments starting in October or November of one year and continuing into June of the following year. NFA did not ship during the months of July to September, because of floods which made the Mindoro roads impassable. They were paying about P7.25 per cavan of rice in 1993.

NFA was also shipping rice to Marinduque and Romblon via Batangas, since there were no direct ferry services between Mindoro and those islands. Volumes of rice shipped to Marinduque and the Romblon islands were also not sufficient to make it worthwhile to charter tramper vessels to accommodate the shipments. NFA was paying tramper rates of P7.55 per bag from Sablayan to Batangas and P9.25 per bag from Sablayan to Lucena.

NFA said that there had been an increase in rice production in Occidental Mindoro because of an increase in land area used for rice cultivation, as well as because of the use of high-yielding and fancy palay varieties.

There were three other shippers of rice (besides the NFA) who were using the Tayamaan Port for rice shipment, and were chartering their own vessels. The consignments of these shippers were small, only around 200 bags on the average, and they were bound for either Marinduque or the Romblon islands. In Sablayan municipality, where there was commercial corn production, there were five major Batangas traders buying palay, rice and corn. These traders claimed that arrastre rates being charged in the different ports of Mindoro Island were not uniform. The arrastre operator in Batangas charged higher arrastre and stevedoring rates than at any of the Mindoro ports. The highest charges at a Mindoro port were at San Jose, followed by Sablayan and Mamburao. At Tayamaan Port, arrastre and stevedoring rates were P1.55 and P0.43 per 50-kg. sack, respectively. In the municipal port of Sablayan, the arrastre rate was P1.62 per sack, while the stevedoring rate was P0.39 per sack.

NFA San Jose was shipping about 5,000 to 10,000 bags of rice annually to Metro Manila, Batangas, Marinduque and Romblon. They were having problems with slow cargo-handling, and with the use of batels or barges, which could contain 1,200 bags maximum, i.e., a load of only 60 tons. Another NFA problem was the rice pilferage and spillage which was occurring, which NFA maintained resulted in significant weight reductions between their warehouse and the points of destination.

NFA was being provided by Viva Shipping Lines with a limited allocation of space, sufficient for 1,000 bags only, on Viva's RORO vessel calling at the port of San Jose. Whenever NFA's rice shipment exceeded 1,000 bags in size, they were not able to fully unload at Batangas Port on a single voyage, since the Viva RORO vessel had only one hour at port before starting on its return voyage. This time was insufficient for unloading and loading of breakbulk cargoes, including any large (greater than 50 tons) NFA consignment. NFA could charter a cargo vessel to accommodate its larger consignments, but they were being charged a charter freight rate of P7.25 per bag from San Jose Port to Batangas. In 1991, NFA rice, palay and corn shipments from Occidental Mindoro ports amounted to about 270,000 bags. Destinations of these shipments included the ports of Catanduanes, Marinduque and Romblon. In May 1993, NFA was shipping Occidental Mindoro rice only out of San Jose Port.

In May 1993, there were five Occidental Mindoro rice millers active in trading, and they were regularly shipping out rice to Manila. One trader was shipping about 6,000 bags on ten-wheel trucks (500 bags, or 25 tons, per truck) or trailers (600-800 bags, or 30-40 tons), which were using the Viva RORO vessel to Batangas. Another trader owned his own vessel and was shipping 10,000 bags (500 tons) per voyage to Samar and other provinces. These shippers were paying P1.36 per bag for arrastre/stevedoring service at San Jose (this was also the rate being paid by NFA). According to grain shippers, the trucking cost from the warehouse to San Jose Port was about P2,600 for a ten-wheel truck and P2,370 for a six-wheel truck.

NFA San Jose indicated that there was a problem of lack of trucking services in Romblon and Marinduque. They also had a problem of pilferage in unloading their rice shipments at the Manila North Harbor (Piers 8 and 14). This had resulted in an average reduction in weight of about 1 kilo per bag, i.e., a 2 percent weight loss. NFA was trying to limit the average weight loss to 0.56 percent of every shipment.

NFA Batangas confirmed that they could not rely on regular RORO vessels which were calling at the different ports of Mindoro Island, since these vessels were accommodating passengers as well as cargo, and were therefore on tight schedules, which did not permit sufficient time in ports for the loading/unloading of

breakbulk cargoes. Accordingly, only 20 percent of their shipping requirements were being accommodated by these RORO vessels.

NFA indicated that San Jose, Occidental Mindoro was considered to be the rice granary of Mindoro Island, and that most of the rice shipments were shipped via Batangas to Manila and Cebu. NFA was buying about one-half million to one million bags (25,000-50,000 metric tons) of rice a year in Occidental Mindoro, and was shipping this rice to various destinations.

NFA and the private grain shippers indicated that they had no problem with the existing facilities of San Jose Port, which had recently been upgraded under the Fourth IBRD Ports Project.

Fishery Products

A fishpond operator and shipper based in the municipality of Magsaysay had 50 hectares of fishponds and was producing about 40 tons of milkfish three times a year. He was selling his milkfish production to traders or in the public market at P50 per kilogram. He also had 10 hectares of coastal area which was being used for salt production, and he was able to produce about 100 sacks per day, during the dry months of February to May. He was selling his salt production at P38 per sack to traders or was directly transporting the salt to Manila, where he was able to obtain a price of P65 per sack for the salt.

A member of the fishery association in Mamburao, Occidental Mindoro, indicated that they were hiring a cargo jeep at P3,000 per trip for shipping fish to Manila via Batangas. They were selling their catch at P60 per kilogram in Manila. At times, they sold the fish in the Mamburao public market at P20 per kilo.

Other Shippers

Shippers who were shipping via Abra de Ilog, in May 1993, were mainly traders who bought agricultural produce, such as peanuts, mango, watermelon, watermelon seeds, mango, calamansi, green stone (Mamburao jade), onions, cattle and fishery products from the Occidental Mindoro municipalities of Mamburao, Sablayan and Sta. Cruz. There were also pebbles being shipped out from the towns of Paluan and Abra de Ilog.

Shippers of fish, garlic, salt, tobacco, live animals and fruits, who were shipping via the port of San Jose, indicated that there had been cases of theft and loss of personal property on board the RORO vessel of Viva Shipping Lines, and that the shipping line management had yet to process claims in regard to these losses.

The arrastre operator at San Jose Port and three shippers of general cargo said that Viva Shipping Lines was not issuing bills of lading, but only gave freight receipts. Complaints regarding this practice had been filed with the Sangguniang Pambayan, requesting that MARINA compel Viva Shipping Lines to issue bills of lading, but nothing had yet happened, as of May 1993. These shippers found the freight rate to be expensive, i.e., P6,240 for a ten-wheel truck laden with cargo.

The road transport cost from the municipality of Sablayan to Mamburao or to San Jose was P20-25 per cavan (50 kgs.) of any cargo. Floods became a problem during the rainy season and this hampered the movement of goods between Occidental Mindoro municipalities.

Garlic was being bought by traders at P40-45 per kilogram and was being sold in Manila at P90 per kilo. Prices (May 1993) of other agricultural products bought in Occidental Mindoro were:

Palay	260/cavan
Peanut	200/sack, P 8-11/kg., or P65/can
Corn	250/sack or 4.50/kg.
Camote	120/sack or P 20/can
Cassava	20/can or 1.50/kilo
Mango	8/kilo
Banana	70/100 pieces
Amargoso	10/kilo
Watermelon seeds	70/ganta
Mongo	70/ganta or 13.50/kg.
Watermelon	20/piece
Stringbeans	2/bundle
Onions	30/kilo
Eggplant	100/sack
Squash	20/sack
Gabi	3/kg.
Mango	100/sack
Ginger	6/kilo

Tobacco was being bought at P 26-28 per kilo of first class variety and the same tobacco was being sold at P50-60 per kilo in Manila. Copra was being bought at P3.80 per kilogram, coffee at P24 per kilo and rootcrop (ube) at P6 per kilo.

Arrastre

According to the arrastre operator at Tayamaan Port in Mamburao, 85 percent of the cargo traffic at the port had been diverted to Abra de Ilog, since the introduction of RORO service at that port. He said that he was paying PPA its share of arrastre charges, but that the port was not getting any assistance from PPA for maintenance, since it was not included within the PPA port

system. The port was adequate only for the accommodation of vessels with drafts of 4 meters and below because of the shallow water depth at the pier. (The LSRS notes that 4 meters is sufficient water depth alongside a pier for larger vessels than were calling at Mamburao in 1993. The actual controlling water depth at this port was probably significantly less than 4 meters.)

Further, he indicated that the port needed a 20-30 meter additional berth to enable the port to accommodate at least three batels at one time. Incoming cargoes from Manila and Batangas were mainly bottled cargoes and fertilizer (100-500 bags per consignment), while outgoing cargoes were palay, rice and carabao destined to the Bicol region, Quezon province and Batangas.

Table A.5 indicates the arrastre rates charged by the different arrastre operators in Occidental Mindoro. Table A.6 presents the RORO rates for vehicles in the Batangas-Abra de Ilog and Batangas-San Jose routes. The cargo volumes of major commodities that were loaded and unloaded in the different ports of Occidental Mindoro were compiled from PPA statistics for 1992 and are presented in Table A.7.

MARINDUQUE

The survey conducted on the island of Marinduque covered four of six municipalities, viz., Sta. Cruz, Boac, Gasan and Mogpoc. Four ports were visited, namely: Sta. Cruz, Balanacan Port in Mogpoc, Cawit Port in Boac, and Gasan Port, which is about one kilometer from the Gasan Airport and eight kilometers from the capital town of Boac.

Sta. Cruz and Balanacan ports accommodate passenger and cargo ferry services to and from Dalahican Port at Lucena City, Quezon. Prior to utilizing this port, vessels plying the route used to dock at Cotta Port, also at Lucena City. However, the siltation problem at Cotta forced the authorities to shift to Dalahican as an alternative port.

The ports of Gasan and Cawit accommodate small vessels which provide passenger and cargo services to small ports of Mindoro Island and to Lucena City, respectively, although shipping and passenger traffic were relatively low, as compared to the volumes being accommodated at Sta. Cruz and Balanacan ports.

Interviews were also conducted with the Department of Trade and Industry (DTI), the People's Economic Council (PEC), the Philippine Ports Authority (PPA), Philippine Airlines (PAL), the municipal government of Gasan and ten manufacturers/shippers.

Table A.5

**Cargo Handling Tariffs for Non-Palletized Cargo
at Ports of Occidental Mindoro ***
(pesos)

	Mamburao		San Jose	
	Arrastre	Steved.	Arrastre	Steved.
1. General Cargo				
Non-Prime Commo.	19.25	8.60	32.75	8.80
Prime Commodities				
Rice	18.55	5.20	18.55	8.80
Corn Grits	19.25	5.20	22.70	8.80
Sugar	17.75	7.85	18.55	8.80
Milk	19.25	7.50		
Canned Fish	19.25	7.85		
School Supplies	19.25	7.85		
Fresh Eggs	19.25	7.85		
Edible Oil	18.35	7.75	31.55	8.80
Dressed Chicken	18.35	7.85		
Live Animals (Per head)				
Large (Cattle, etc.)	12.10	8.25	22.00	4.30
Small (Hogs, etc.)	6.15	1.75	8.20	0.60
Vehicles	11.40	8.60	15.50	8.80
Iron and Steel Prods.	67.15	8.60	39.90	8.80
Heavy Lift Cargo (MT)				
5 to 15 tons	31.40	8.25	65.10	8.80
Over 15-20 tons	56.75	8.60		
Over 50 tons	59.25	8.60		
Lumber (1,000 Bd.Ft)	40.00	11.90	43.30	10.85
Ro-Ro Cargo (MT)	6.85		9.40	

* Palletized cargo is given a 15% discount, i.e., rates are 85% of these shown in the table. Dangerous cargo is charged 150% of the standard rate for non-prime commodities.

Source: Arrastre Operators

Table A.6

RORO Vehicle Transport Rates, 1993

	Batangas- San Jose (141 n.m.)	Batangas- Abra de Ilog (26 n.m.)
Automobiles	P 2,216	P 400
Land Cruise	2,511	450
Trooper	2,511	450
Land Rover	2,511	450
Mini-Ace	2,511	450
Hi-Ace	2,929	530
Van	3,348	600
Coaster	5,692	1,020
Tamaraw/ Fiera	2,092	380
Pick-up	2,929	530
Owner Type Jeep	2,025	360
Passenger Jeep (short)	2,025	360
6-Wheel Truck (mini)	3,348	600
6-Wheel Truck (reg.)	4,771	860
6-Wh.Truck (long-body)	5,357	960
6-Wh.Dump Truck	5,650	1,020
10-Wheel Truck	11,299	2,030
10-Wheel Dump Truck	5,533	1,360
14-Wheel Trailer	15,066	2,710
18-Wheel Trailer	21,762	3,920
Passenger Bus (big)	7,533	1,360
Passenger Bus (mini)	6,194	1,110

Source: Domestic Shipping Office
MARINA

Table A.7

Major Commodities Shipped via Batangas, 1992
(in metric tons)

Commodity	Abra de Ilog		San Jose		Sablayan	
	In	Out	In	Out	In	Out
Vehicles	11,386	11,836	8,164	7,760	230	641
Cement	1,396	37	364	1,016	816	-
Fertilizer	233	6	652	149	980	-
Refined Petroleum	160	2	126	124	6	-
Live Animals	240	608	188	2,766	42	690
Palay/Rice	116	2,985	173	5,204	416	10,446
Wheat	162	5	302	21	436	15
Sugar	233	169	298	33	525	12
Fruits/Vegetables	133	2,615	280	1,025	33	540
Animal Feeds	239	198	953	1,466	98	1,163
Bottled Cargo	331	6	353	36	282	-
Other Cargoes	4,988	3,793	3,966	7,553	450	4,854
TOTAL	19,617	22,260	15,819	27,153	4,314	18,361

Source: Philippine Ports Authority

Sta. Cruz

The port of Sta. Cruz is situated in the northeastern portion of Marinduque. In May 1993, there was one RORO vessel and one conventional passenger/cargo vessel that were serving the Sta. Cruz-Dalahican route. Batels or motorized bancas were plying the Sta. Cruz-Dalahican and Sta. Cruz-Cotta routes with capacities of 50-100 passengers.

Major commodities being shipped into the port were wheat, fish, fruits and vegetables, sugar, animal feeds, petroleum products, fertilizer, lumber, coconut oil, textile/garments, palay/rice, cement, iron/steel, metal products, electrical and transport equipment, bottled cargo, furniture and handicrafts. In the outward direction, the only commodity of importance was copra. The total volume handled at the port in 1992 was 39,000 metric tons, of which copra outflows amounted to more than 16,000 tons.

Fruits and Vegetables

Shippers of assorted vegetables and fruits, who were shipping by jeeploads aboard the RORO ferry, disclosed that shipping services (one RORO vessel and a passenger/cargo vessel) were adequate in terms of reliability and efficiency. However, it was observed that the franchised RORO vessel could not accommodate more than two vehicles at one time (cargo jeeps only). Half of the area allocated for vehicles was normally being occupied by passengers. The freight charge was P25 for every 30 kilos of cargo, or P500 per jeepload. The arrastre fee was P2 per sack.

Copra

As a rule, the size of copra shipments on the RORO vessel was in the range of 40-50 sacks, whereas batel operators would accept shipments of more than 100 sacks per shipper. Normally, one batel carried a maximum of 400 sacks (20 tons) per voyage at a charge of P5 for every 30 kilos.

Balanacan

Balanacan Port is situated in the municipality of Mogpoc, about 25 kilometers from the capital town of Boac. In May 1993, only one shipping line was providing cargo and passenger services in the Balanacan-Dalahican route.

According to PPA traffic records, there appears to be substantially more shipping activity at Balanacan, compared to traffic at Sta. Cruz Port. Balanacan had a recorded cargo throughput of more than 114,000 metric tons, in 1992, but nearly half of that total constituted the vehicles that were being moved aboard the RORO ferry operating between Balanacan and Dalahican.

Thus, actual trade being accommodated through Balanacan amounted to 60,000 metric tons in 1992.

Major commodities shipped from the port included live animals, fruits and vegetables, handicrafts, copra, coco lumber and fish preparations. These products were being sourced from the municipalities of Gasan, Boac, Buenavista and Mogpoc.

Shippers generally rated shipping services as fair. Viva Shipping Lines, the lone company serving the route, was reported to have a professional vessel crew who were pleasant, properly dressed, and adequately trained.

Table A.8 presents the 1992 and 1993 commodity flows at the ports of Sta. Cruz and Balanacan.

Government Agencies

Based on interviews with the PCG and PPA officials, the shipping operators were not abiding by the rules and regulations with regard to vessel capacity. The PCG officer stressed the need for an additional shipping line to provide services, in order that rates would become competitive. The MV Sea Gold, operated by Viva Shipping Lines, was traveling once a day to Dalahican Port in Lucena. It was leaving Balanacan Port at 0400 hours and arriving at Dalahican at 0800 hours.

The Chairman of the People's Economic Council (PEC) disclosed that shippers of handicrafts and other softwood products, e.g., products of the Softwood Producers Association and the Marinduque Handicraft Producers Association, had encountered shut-outs due to the lack of vessel capacity, particularly during peak months. The chairman stressed that the prevailing situation had failed to attract investors.

To minimize shut-outs, the shipping authorities were prioritizing shipments of perishable commodities, such as bananas for catsup processing. Shippers of handicrafts who had to meet their export shipment schedule had, therefore, to transport their cargo by air instead.

The Philippine Airlines (PAL) Manager at Gasan Airport said that about 200 kilos of handicrafts (baskets, hats, novelty items from Marinduque) were transported by air every week to meet the immediate requirements of Manila buyers. He further disclosed that, prior to the operation of RORO vessels in 1987, meat products, bangus fry and handicrafts were normally shipped by air.

Gasan

Gasan municipal port was the unloading point for rice and

Table A.8

Commodity Flows at Marinduque Ports, 1992 - 1993*

(In Metric Tons)

Commodity	Annual Totals		2-yr totals
	1992	1993	
BALANACAN			
DOMESTIC			
Inbound			
Transport Equipment	27,196	29,967	57,163
Other Gen. Cargo	25,552	30,502	56,054
Cement	5,227	4,665	9,892
Bottled Cargo	4,590	4,135	8,725
Palay & Rice	1,989	4,993	6,982
Animal Feeds	887	613	1,500
Fruits & Vegetables	665	634	1,299
Wheat	707	160	867
Ref. Petroleum & Prod.	849	1	850
Iron & Steel	258	202	460
Other Commodities	1,343	1,239	2,582
"Total"	69,263	77,111	146,374
Outbound			
Transport Equipment	26,688	30,073	56,761
Other Gen. Cargo	9,258	16,000	25,258
Copra	5,086	2,009	7,095
Lumber	2,646	854	3,500
Fruits & Vegetables	660	385	1,045
Live Animals	591	353	944
Metaliferous Ores/Scrap	44	60	652
Fish & Fish Preparation	69		216
Bottled Cargo	72	0	72
Animal Feeds	58	0	58
Other Commodities	40	29	69
"Total"	45,212	50,458	95,670
STA. CRUZ (MARINDUQUE)			
DOMESTIC			
Inbound			
Transport Equipment	7	29,823	29,830
Cement	7,005	14,700	21,705
Other Gen. Cargo	5,002	4,132	9,134
Palay & Rice	2,644	1,685	4,329
Sugar	1,220	1,433	2,653
Animal Feeds	943	1,346	2,289
Wheat	1,023	1,068	2,091
Crude Minerals	1,077	701	1,778
Iron & Steel	288	702	990
Lumber	510	406	916
Other Commodities	1,604	1,600	3,204
"Total"	21,323	57,596	78,919
Outbound			
Copra	16,285	14,667	30,952
Transport Equipment	-	24,423	24,423
Other Gen. Cargo	238	650	888
Bottled Cargo	377	-	377
Fruits & Vegetables	279	80	359
Textile Fiber	209	-	209
Live Animals	47	83	130
Manufactures of Metal	68	55	123
Plywood & Veneer	-	96	96
Fish & Fish Preparation	46	4	50
Other Commodities	22	29	51
"Total"	17,571	40,087	57,658

* No foreign cargo was accommodated at the ports of Balanacan & Sta. Cruz, 1992 - 1993.
All 1992-1993 cargo was breakbulk, and no containerized or bulk cargo was accommodated at either port.

Note: At berth

Source: PPA Annual Statistical Report, 1992 - 1993.

vegetable shipments from Pinamalayan, Oriental Mindoro. One or two pumpboats were transporting these cargoes daily from Gasan to Pinamalayan. Per interview with the Gasan Arrastre and Stevedoring Services, approximately 100 sacks of rice per week were being shipped from Pinamalayan, Oriental Mindoro, which was, as a consequence, considered to be the source of 90 percent of Marinduque's rice requirements. The arrastre charge was P2 per sack while freight cost was P5 per sack of 50 kilograms. There were 5 to 6 pumpboats on regular schedules which were transporting passengers to and from Pinamalayan, Oriental Mindoro. The passenger fare was about P50 per head for a 2 1/2-hour trip.

Cawit

The port of Cawit was being upgraded and developed to serve shippers originating from Boac, Gasan and Buenavista. According to small shippers of copra, the port could possibly serve as a link between Marinduque and Romblon and the Visayan islands. The infrastructure development project was being funded by the United States Agency for International Development (USAID) and was scheduled for completion by the end of the third quarter of 1993.

It was observed that shipping activity at this port was characterized by copra trading between Cotta (Lucena) and Boac. There were three motorized bancas providing shipping services to about fifteen commercial shippers of copra. Shippers indicated that shipping services were adequate for their purpose.

During coconut harvest season, which is from January to May, the buying price of copra was generally quite low, about P3.80 per kilo, as compared with P5 during lean months, and this price differential provided an incentive for dealers to stock their produce in private warehouses for about three months. When the price improved, commercial shippers started to trade, and they haggled at the ports for shipping space starting in June.

Average volume of shipment per trader was 150 sacks per month. The trucking cost was P3 per sack of 52 kilos, the arrastre charge was P2 per sack, and the freight cost was P5 for every 30 kilos.

ALBAY

The survey conducted in the province of Albay covered two major ports, namely Tabaco and Legaspi. Site inspections at the ports of Tabaco and Legaspi were undertaken to determine cargo movements within the province. Interviews were conducted with the Department of Trade and Industry (DTI) regional office, the National Food Authority (NFA), the Philippine Ports Authority (PPA), the Albay Chamber of Commerce and Industry (ACCI), five shippers (electronic equipment, grocery items and dry goods), three

truckers and the two arrastre operators at the two ports.

Tabaco

The port of Tabaco is located some 30 kilometers from Legaspi. Compared to Legaspi port, it has a wider berthing space and can accommodate international vessels. It serves as the link between Albay and Catanduanes, particularly the ports of Virac and San Andres. Passenger ferry services were being provided in the Tabaco-Virac, Catanduanes route while Legaspi port was handling purely cargo services.

Commodities shipped via Tabaco port to and from Virac, Catanduanes were flour, sugar, copra, lumber, plywood, abaca, metal, live animals, fish and fish products, furniture, palay, chemicals, fertilizer, cement, scrap iron, fruits and vegetables, bottled cargo, iron/steel and animal feeds.

Table A.9. shows the commodity flows at Tabaco Port during 1992-1993. As shown in the table, the volume of "transport equipment" accommodated at the port, i.e., vehicles moving by RORO ferry, expanded tenfold from 1992 to 1993, albeit from a very low 1992 base.

Shippers

Based on interviews with Albay's two largest commercial establishments (with an aggregate annual cargo volume of 18,000 mt of various dry goods and electrical appliances) and three other major shippers of rice, cement and copra (with an aggregate annual cargo volume of approximately 11,000 mt), the following problems were identified:

- ▶ Shipment shut-outs were being experienced during peak season due to lack of space.
- ▶ Slow vessel turnaround was occurring, due to engine trouble and poor maintenance of old vessels.
- ▶ Cargoes were not insured against theft or damage.
- ▶ Pilferage losses of sugar and palay shipments were occurring due to poor handling.

Despite these problems, shippers had no choice but to ship their cargoes with the lone shipping company serving the Tabaco-Virac route. Further, vessel crew members were rude, arrogant and unprofessional. This negative attitude of the crew was believed to stem from their knowledge that shippers would definitely ship with them, for lack of another shipping operator.

Table A.9

Commodity Flows at Tabaco Port, 1992 - 1993

(In Metric Tons)

Commodity	Annual Totals		2-yr totals	2-year Totals of Cargo		
	1992	1993		Breakbulk	Bulk	Cont.
DOMESTIC						
Inbound						
Cement	21,563	19,793	41,356	41,356	-	-
Wheat	6,333	6,363	12,696	12,696	-	-
Abaca	6,106	5,003	11,109	11,109	-	-
Transport Equipment	754	7,740	8,494	8,494	-	-
Copra	3,118	4,945	8,063	8,063	-	-
Fertilizer	3,100	4,625	7,725	7,725	-	-
Sugar	4,818	445	5,263	5,263	-	-
Iron & Steel	1,761	-	1,761	959	802	-
Other Gen. Cargo	349	249	598	598	-	-
Metaliferous Ores/Scrap	499	26	525	525	-	-
Other Commodities	703	483	1,186	1,186	-	-
"Total"	49,104	49,672	98,776	97,974	802	
Outbound						
Palay & Rice	8,428	7,229	15,657	15,657	-	-
Copra	6,381	5,371	11,752	1,366	10,386	-
Other Gen. Cargo	6,558	4,978	11,536	11,536	-	-
Transport Equipment	810	5,974	6,784	6,784	-	-
Wheat	1,566	1,878	3,444	3,444	-	-
Bottled Cargo	1,743	1,649	3,392	3,392	-	-
Iron & Steel	1,894	1,382	3,276	3,276	-	-
Abaca	2,550	138	2,688	2,688	-	-
Sugar	1,205	1,373	2,578	2,578	-	-
Animal Feeds	648	1,894	2,542	1,653	889	-
Other Commodities	4,907	2,449	7,356	5,656	1,700	-
"Total"	36,690	34,315	71,005	58,030	12,975	
FOREIGN						
Import						
Fertilizer	15,943	6,646	22,589	7,448	15,141	-
Cement	10,211	1,760	11,971	10,906	1,065	-
Other Gen. Cargo	-	5,500	5,500	5,500	-	-
Chemicals	1,714	2,269	3,983	1,240	2,743	-
Lumber	-	1,208	1,208	1,208	-	-
"Total"	27,868	17,383	45,251	26,302	18,949	0
Export						
Copra	-	5,000	5,000	-	5,000	-
Animal Feeds	-	4,075	4,075	-	4,075	-
"Total"	-	9,075	9,075	-	9,075	

Note: At berth and anchorage

Source: PPA Annual Statistical Report, 1992 - 1993.

The former president of the Albay Chamber of Commerce suggested that there was a need for newer and larger vessels to be operated by another shipping line, in order to accommodate cargo trucks, jeepneys and bulk shipments. He further added that providing an environment of healthy competition would improve shipping services and hopefully would increase cargo movement in the province.

Shippers of dry goods, electronic equipment and other manufactured products, were shipping one or two truckloads every other day. A truck had a capacity of about 120 cartons and each carton weighed 15 kilograms (i.e., a load of 1.8 metric tons). The freight rate was between P10 and 15 per carton, or P1,820 for hire of a 10-wheel truck and P1,300 for a 6-wheel truck.

Arrastre

Shippers noted that arrastre services in Tabaco Port were less efficient than arrastre services in Legaspi port. They further revealed the following issues :

- ▶ Ironically, the availability of handling equipment (e.g., 4 forklifts, 2 cranes) and 4 trucks had not improved the quality of handling services. Shippers attributed this to inefficiency and poor work attitudes of the arrastre workers.
- ▶ Pilferage was rampant at the port due to lack of discipline of arrastre labor.

The Tabaco arrastre management was hesitant to provide the LSRS with the arrastre rates they were charging when the team requested the information. The manager (Tabaco vice-mayor) referred the survey team to the Legaspi arrastre management instead.

Legaspi Port

Commodities transported via Legaspi Port were cement, sugar, bottled cargo, fertilizer, live animals, copra, iron/steel, abaca, plywood, palay, wheat, petroleum products, electrical appliances, and animal feeds. Inflows were mainly sourced from Cebu, Davao, Misamis Oriental, Samar, and Masbate. Shipping activity at the port was largely limited to chartered vessels (e.g., barges) carrying breakbulk cargoes such as sugar, cement, and bottled cargo from Davao, Iloilo, Negros and Cebu. The companies serving this cargo traffic were Candano Shipping Lines and Numitraco Shipping Lines.

About 3 or 4 cargo vessels (up to 5,000 GRT) can be accommodated at legaspi Port at one time. During peak season,

which is July to September, vessels were waiting at anchorage for about 3 to 4 days before they could unload cargo due to the limited berthing space.

Problems gathered from shipping operators were basically port management concerns (i.e., berthing space and non-dredging of port basin) while shippers generally complained about the slow turnaround of vessels, delays in shipments and lack of warehousing facilities. Arrastre services at the port were adequate, according to the shippers, and the arrastre rates were based on PPA approved cargo-handling tariffs.

Cement dealers in Legaspi City were selling about 3,000 bags each month to retailers in Allen, Samar. Any surpluses of cement, after allocations for other provinces near Albay (i.e., Sorsogon, Camarines Sur and Camarines Norte), were shipped to Virac via Tabaco.

Table A.10 presents the cargo-handling rates at the port of Legaspi.

CATANDUANES

The island province of Catanduanes is linked to the Bicol mainland by the ports of Virac and San Andres. In June, 1993, there were two vessels alternately plying the Virac-Tabaco route, one trip, daily. MV Eugenia (488.2 GRT), a RORO vessel, and MV Virac (97.86 GRT) were carrying both passengers and cargoes to and from Virac. In addition to these services, there were six motorized bancas plying the route. MV Calixta (198.25 GRT) was operating one trip to San Andres Port daily.

Major commodities transported to and from Virac, in 1992, were abaca (6,105 mt), copra (3,116 mt), cement (21,562 mt), flour (6,329 mt), and fertilizer (3,100 mt). Fish, lobsters, mudcrabs, and giant tiger prawns were shipped out of Virac but in smaller quantities.

There is a port in San Andres, Catanduanes which is located some 17 kilometers from Virac seaport. San Andres is one of the eleven municipalities of the island province of Catanduanes. Cargoes handled in San Andres port were abaca, copra, cement and general cargo.

Abaca Shippers

Four shippers (two were marginal and two were commercial traders) were based in San Vicente, Virac. Marginal shippers were those who were shipping out some 20 metric tons of abaca fiber per month, whereas the commercial ones shipped an average of 10 metric

Table A.10
Arrastre and Stevedoring Rates, 1993
Port of Legaspi
(pesos)

I. Cargo handling rates	Non-Palletized		Palletized	
	Arrastre	Stev.	Arrastre	Stev.
A. General cargo (Revenue Ton)				
Nonprime Commodities	36.30	10.80	28.30	7.65
Prime Commodities				
Rice	24.90	9.85	19.40	6.95
Corngrits	25.25	9.85	19.70	6.95
Milk	36.30	9.85	28.30	6.95
Sugar	36.30	9.85	28.30	6.95
Eggs	36.30	9.85	28.30	6.95
Sch: supplies	36.30	9.85	28.30	6.95
Edible oil	36.30	9.85	28.30	6.95
Canned fish	36.30	9.85	28.30	6.95
Dressed chicken	36.30	9.85	28.30	6.95
B. Live Animals (Per Head)				
cattle & carabao	33.05	10.80	-	-
Hogs & goats	4.90	2.15	-	-
C. Vehicles (Revenue Ton)				
	15.70	10.80	-	-
D. Iron & Steel Prod. (Revenue Ton)				
	76.90	10.80	-	-
E. Lumber (Per 1,000 Brd.Ft.)				
	160.00	22.50	59.95	7.65
F. Heavy Lift				
5 tons & over (Metric Ton)	175.40	10.80	-	-
G. Dangerous/Hazardous Cargo (Revenue Ton)				
	To be charged in accordance with PPA Adm. Ord. Nos. 02-89 & 01-90			
H. Bulk Cargoes (Metric Ton)				
	32.10	16.80	-	-

tons per day during peak season (March-May) and 45 metric tons per month during the lean season (rainy periods). Following are the June 1993 charges for shipping one bundle of abaca fiber (125 kgs. per bundle):

	Per bundle
Freight cost (Virac-Tabaco)	P 11.95
Arrastre (Virac)	4.60
Trucking (Catanduanes Port)	6.50
Truck Loading/unloading	3.50
Total	P 26.55

The majority of large-scale abaca traders were shipping their cargo through privately-owned motorized bancas ranging from 12.91 GRT to 34.67 GRT. The overcrowded situation at the port of Virac had prompted them to provide their own transportation facilities. However, it was observed that during the rainy season, strong currents caused some of these small vessels to capsize.

The abaca traders complained about the aging vessel, the MV Eugenia, which frequently had engine malfunctioning at sea. During the survey period, the said vessel failed to reach Virac for two consecutive days. It was replaced by a smaller vessel, the MV Virac, which could not accommodate the cargoes due to insufficient cargo space.

Although the MV Eugenia is a RORO vessel, it can only accommodate two or three cargo jeeps or pick-ups at one time, and cannot accommodate larger vehicles. Shippers found this mode of transport cheaper since it was providing free passage to those on board the cargo vehicle (including the driver). Thus, they were clamouring for an additional RORO vessel which would be large enough to accommodate heavy and light vehicles.

Small traders were shipping regularly with the MV Eugenia and the MV Virac. However, shut-outs were being experienced once or twice a month even during the lean season. They believed that these shut-outs were due to the increase in the number of shippers waiting for their cargo to be loaded. The problem was aggravated by the failure of the arrastre management to implement a "first-come-first-served" policy.

However, an interview with the PPA revealed that the shut-outs were caused by the inefficiency of arrastre laborers who refused to unload cargoes whenever the trucks of consignees were not available. In addition, the vessel was normally leaving the port of Virac one and one-half to two hours after arrival. In this case, portions of the incoming cargoes remained in the vessel and would then be unloaded when the vessel returned on the following day. In some instances, small abaca traders were requesting the

larger traders (e.g., Chingbee and Poa), who had their own vessels, for possible space, since abaca fiber deteriorates in quality or grade if stocked for more than one week. According to these large traders, they were accommodating these shipments as long as there was enough space in the vessel. These vessels had very little capacity, however, an average of only 25 GRT each, so that it was difficult to accommodate all demand for abaca shipment. They did not impose extra charges beyond the stipulated shipping rates when accommodating the assignments of small shippers.

According to the PPA port terminal supervisor, the Catanduanes Port Arrastre Services Cooperative, Inc. (CPASCI) had a very strong labor group backed by the municipal mayor who once harassed him regarding regulations being imposed by the PPA. The inefficiency of CPASCI had not been formally complained of by shippers and shipping operators. It was unfortunate that the local chapter of the Chamber of Commerce was not active on these problems; its membership, he thought, was not cohesive, and thus was incapable of assessing the problems at hand, and providing remedial measures for their correction.

Fishery Products

There were five major fish dealers in Virac and a few small traders. Their average daily shipment was 3-5 styrofoam boxes per shipper during peak months, and there were 30 kilos per box.

Per Box Charges

Freight cost (Virac-Tabaco)	P3.00
Arrastre (Virac)	6.00
Trucking (Bato-Virac port)	3.50
Labor	7.00
Total	P19.50

Catanduanes fish traders were selling their fishery products to Sorsogon traders who dictated the prices of fish on the basis of demand. Further, the supply of fish was heavily affected by the weather disturbances on the Pacific Ocean.

Two shippers who were interviewed mentioned the presence of a Taiwanese trader in 1992, who had stopped operating due to lack of a regular supply of fish, particularly of red snappers and blue marlin. A Chinese trader who was once transporting red snappers by air had likewise stopped due to the same problem. Meanwhile, those who experienced shut-outs by the shipping line transported their fishery products by air to avoid spoilage. Fish traders dealing with the Sorsogon buyers were taking the risk of shipping on motorized bancas which traveled faster.

Other Shippers

The San Miguel Corporation and Coca-Cola port supervisors were interviewed. Their average rate of shipment was 15,000 cases a month, of 12 bottles or 24 bottles per case. Bottled cargoes were transported by barge from Mandaue, Cebu to Legaspi and Virac.

The tramper vessels being utilized by the Albay Rice Mill in Legaspi City were considered by the rice mill to be providing satisfactory shipping services. Nevertheless, Albay Rice Mill did not discount the possibility of utilizing the Virac-Tabaco route once the company would decide to set up a depot in Bicol. SMC depots were located in the Visayas (i.e., Tacloban, Cebu, Tagbilaran, Bacolod and Iloilo) and Mindanao (Cagayan de Oro, Gen. Santos, Davao and Zamboanga). Coca-Cola had a manufacturing plant in Naga. All of its shipments were being made via Tabaco Port.

Table A.11 indicates the arrastre and stevedoring rates charged at the port of Virac, in accordance with PPA Memorandum Circular No. 13-91.

ROMBLON

Shippers interviewed in Romblon were transporting fishery products, marble, fruits and vegetables, livestock, manufactures and dry goods to Manila and Batangas.

Fishery Products

The fish traders interviewed on the island of Tablas, Romblon were sourcing their fish from the municipalities of San Agustin and Looc, Romblon. Average shipment of fishery products was 30 styrofoam boxes, each box weighing about 40-50 kilos. Buying price of fish was P8-10 per kilo on Tablas Island, and the wholesale price in Batangas was P700-800 per box and a sales price of P1,200 per box could be obtained in Manila. Each shipper was incurring the following expenses for every shipment:

	Per Box
Jeepney Hire (San Agustin-Poctoy Port)	P 16-17
Arrastre (Poctoy Port, Odiongan)	2.75
Freight rate (Odiongan-Batangas)	30
Arrastre (Batangas Port)	5
Porter	2
Jeepney Hire (Batangas-Manila)	36-39
Total	95.75
Total Cost (30 boxes)	P 2,872.50

Table A.11

Arrastre and Stevedoring Rates, 1993
 Port of Virac
 (pesos)

I. General Cargo	Non-palletized		Palletized	
	Arrastre	Stev.	Arrastre	Stev.
A. Non-Prime Commod. Rev.ton	32.20	8.60	25.10	6.05
Rice	16.10	7.80	12.50	6.50
Corngrits	22.25	7.80	19.70	5.50
Sugar	20.95	7.80	25.10	5.50
Chicken	32.90	7.80	25.10	5.50
Eggs	32.20	7.80	25.10	5.50
Canned fish	32.20	7.80	25.10	5.50
Milk	32.20	7.80	25.10	5.50
Sch. Supplies	32.20	7.80	25.20	5.50
II. Dangerous Cargo	To be charged 150% of applicable rates stipulated in PPA Adm. Nos. 02-89 & 01-90			
III. Live Animals (Per Head)				
A. Hogs & goats	4.90	1.75		
B. cattle & carabao	22.85	8.60		
IV. Iron & Steel Prod. (Rev.ton)	76.90	8.60	59.95	6.05
V. Vehicles (Rev.Ton)	15.70	8.60		
VI. Heavy Lift				
5 tons & over	Met.tons	57.30	8.60	
VII. Logs	Per 1000			
	Bd.ft.	157.00	17.90	
VIII. Lumber	Per 1000			
	Bd.ft.	159.80	17.90	124.50 12.60

Delays in departure of the vessel were being experienced about two to three times a month due to the following reasons: (a) waiting for the high tide in order for bigger vehicles to board the vessel and for the vessel to depart without touching the bottom; and (b) waiting for the captain of the vessel and favored passengers and shippers.

There were times that shippers were experiencing shut-outs, particularly when the vessel was full or overloaded. In such cases, they just sold the fish in the neighboring towns of Tablas Island.

The crew of Viva Lines reportedly were not properly stowing the cargoes and vehicles inside the vessel. Shippers had to closely guard their shipments for the whole duration of the trip. Only because of this close attention by shippers to their cargoes were there no reports of theft and damage to shipments. The shippers considered, however, that shipping line management should explore the possibility of selling ice to shippers of fishery products, to maintain the quality of their shipments. The cook of the vessel, MV Kristoffer, was usually asking for at least five kilos of fish from the shippers for free.

Shippers used to ship fish directly to Manila from Odiongan, Romblon but it required a longer time, about 12-14 hours, to reach North Harbor from Odiongan, and the lack of ice resulted in spoilage of their fish shipments. They preferred to ship via Batangas since they could buy ice in Batangas before proceeding to Manila.

One vessel, the M/V Zamboanga, had called at Odiongan Port for only about a month. Odiongan was its last port of call before going to Manila, and the vessel was always overloaded, so that both shippers and passengers found it difficult to get a booking.

Shippers recommended that the freight rates be lowered, that operators have ice available on board, that passengers be provided cots and food, and that shippers be given free passage (which had once been the practice). They were generally of the view that MARINA should encourage more operators to introduce additional shipping services in the route.

Livestock

Shippers of hogs were shipping about 60-80 head per trip and these weighed about 20-50 kilos per head. They shipped hogs from Odiongan to Manila (Baclaran and La Loma, Manila) about four times a month. They bought hogs at Odiongan and in neighboring municipalities at P28-30 per kilo (liveweight) and the selling price in Manila was P37-38 per kilo. Expenses incurred by each shipper were as follows:

Jeepney Hire (Libertad, Odiongan-Poctoy port)	P600-700
for 50 head	
Arrastre (Poctoy Port)	P 25/head
Freight rate (Odiongan-Batangas)	23.45/head
Jeepney hire (Batangas-Manila)	1,100/pack.
Escort (2)	500/month
Feed and water (two drums) during voyage	1,000/trip

Other shippers were using their own jeepneys when shipping hogs to Manila and the freight rate was P945/jeep. A double-decker jeep could load 40 large hogs or 80 small hogs while an ordinary jeep could only load about 30 hogs. They incurred cost of P100/head and shrinkage was about 3 kilos per head in each shipment.

There were some problems with the stowage of various cargoes inside the vessel, so much so that hog shipments were mixed with other shipments and might be placed near fruits/vegetables or with other cargoes. Shippers were fully responsible for their shipments during the voyage since the vessel crew did not seem to be concerned about the potential damage if cargoes were mixed.

There had, at one time, been reported cases of hog switching, but shippers now put a distinct mark on their hogs, i.e. they cut the hair at the back of the hog to form a sign or symbol in order for shippers to immediately identify their hogs from the others, and this method had proven to be effective.

Marble

The shipper of marble who was interviewed had no complaint with regard to the service of Viva Lines, but he indicated a need to have the existing operator, or a new operator, increase the frequency of trips to Romblon. They had no problem with the security of their shipment on board. They shipped about once or twice a week to Manila and the average monthly volume was 300 cubic meters. Their cargo was breakbulk and was being placed inside the cargo hold of the RORO vessel.

Other Shippers

One shipper of copra was shipping about 6,000 metric tons of copra to Manila annually and he had chartered a tramper vessel once a week during 1991 and 1992. About 80 percent of his shipments were transported by liner vessel and 20 percent by tramper and he had no problem with capacity.

-----The copra shipper had the following backhaul cargoes: steel products, cement, dry goods, bottled cargoes and grocery items. They were experiencing losses from breakage or spillage with every

shipment. He preferred RORO vessels over conventional cargo vessels, and proposed a reduction in arrastre and stevedoring charges, since such services were not required when cargoes were accommodated aboard RORO vessels.

Fruits and Vegetables

About five shippers of fruits and vegetables were interviewed. Fruits being shipped were starapple and mango (indian and carabao varieties).

The shipper of starapples usually shipped to Manila about 20-30 rattan baskets (tiklis) which were about 50 kilos each. They bought the fruit from Odiongan, Romblon at a farmgate price of P2 per kilo during the months of February to May. These were then being sold in Batangas for P10 per kilo or in Manila for P20 per kilo.

The average shipment of mango fruit (carabao variety) was in the range of 50-60 rattan baskets by each shipper and the average weight per basket was 55 kilos. These were being bought at an average of P2,000 per tree (not yet harvested). The mango trader was the one who harvested the fruits at an average of 40 rattan baskets per tree. Shipments were usually bound for Batangas, and were sold there at P10 per kilo during the months of February to May.

As regards indian mangoes, shipments ranged from 25 to 30 sacks in size, at 30 kilos per sack, or about 400 pieces per sack. The buying price was P30 per 100 pieces and the mangoes were being sold in the Batangas market at P120 per sack wholesale or a retail price of P1.25 apiece.

Expenses incurred by each fruit shipper were as follows:

	Per Rattan Basket
Jeepney hire (downtown-Poctoy Port, Odiongan) -	P 10.00
Arrastre (Poctoy port)	2.75
Freight rate (Odiongan-Batangas)	15.00
Arrastre (Batangas port)	5.00

Shippers were having problems with the arrastre gang who asked for an extra fee of P25 to 30 per rattan basket once these arrastre workers entered the ship to assist in stowage of the shipments. The shippers were also paying an exit fee of P 10 per jeep (empty) from the Poctoy Port compound.

Delays in departure were being experienced from thirty minutes to one hour due to reasons such as the low tide condition at the

port, waiting for the captain of the ship to arrive, and waiting for shippers who were given preferential treatment or privilege. RORO vessels usually departed at 1930 hours and this was usually when low tide occurred.

Shippers complained of the lack of concern on the part of the vessel crew in regard to proper stowage of the cargoes and vehicles inside the vessels. They had to arrange their own shipments on-board on a first-come-first-served basis. Sometimes fruit shipments were placed beside the hogs, cattle and goats, particularly when there was limited space available.

The shippers indicated that there were two passenger/cargo vessels (MV Diamond and MV Ruby) that used to call at Looc port, which was a neighboring town of Odiongan. In 1993, however, the vessels had stopped operating in the Romblon-Batangas route, and were operating in the Batangas-Calapan and Palawan routes.

Masbate

The island of Masbate was being served by a RORO vessel, the MV Cebu Princess, which plied the Manila-Masbate-Cebu route once a week. The MV Cebu City of William Lines was also serving Masbate once a week.

Fishery Products

There were seven commercial dealers of fresh fish in Masbate who were shipping fishery products to Manila, Legaspi City, Tabaco, Naga City, Sorsogon and Cebu. Shippers of shellfish, i.e., prawns, giant crabs, shrimps, were shipping via Bulan Port to Manila.

The freight cost to Manila differed between the two shipping lines that were serving the Masbate-Manila route. William Lines was charging higher than Sulpicio Lines by around 20 percent. These rates were as shown in Table A.12.

When vessels failed to call at the port of Masbate (once in three months during the dry season and two times a month during the rainy season) shippers were transporting their cargoes on motorboats to the port of Bulan and then transporting them by land via South Road to Manila. The freight cost by motorboat from Masbate to Bulan was P150 for a small box (under 40 kgs), P250 for a medium sized box (40-80 kgs), and P350 for larger boxes of up to 100 kgs.

They were paying P100 transport cost from the warehouse to the pier. The buying price of fish in Masbate was P70/kg. and the fish was being sold in Manila markets at P120/kg. Hence, the difference in price could cover the cost of transport and handling of fish.

(The price differential was P5,000 for a 100-kg box of fish purchased at Masbate and sold at Manila, and the ferry cost plus arrastre and stevedoring cost amounted to less than 10 percent of the differential. Direct shipment on a liner vessel cost even less.)

Shippers of shellfish products were encountering problems of spoilage losses (5 percent of total volume) whenever the vessels calling at the port of Masbate were delayed in arrival for as long as five hours, which was occurring once a month due to delays in their loading of cargoes in Manila North Harbor. In such cases, the shippers instead shipped via Bulan port and then by land to Manila and occasionally they shipped via air, in which case they paid P6 per kilo.

The largest shipper of giant crabs was shipping out 250 kilos per week at P85/kg. The selling price in Manila was P180-P185/kilo. The sea freight was P90/ice chest (at 20-24 kgs./chest) on motorboat or a total freight cost of P1,125. If shipped by air, PAL freight charges were P6 per kilo for cargoes weighing 250 kgs. and above, while the charge for cargoes of less than 250 kgs. was P9 per kilo.

One sack of copra weighed approximately 55 kilograms. One Chinese trader was shipping out an average of 1,500 sacks per week to Manila through Sulpicio Lines. Two other Chinese traders were shipping out through the same shipping line an average of 2,000 sacks of copra per week. Freight cost for copra for Masbate-Manila was P17.50/sack or P0.32/kilo. The rate was higher than the MARINA stipulated rate of P0.18 per kilo.

Copra was also being shipped via Bulan port with the use of motorized bancas. Freight cost on motorized banca was around P23/sack or P0.42 per kilo in the Masbate-Bulan route. This rate was higher than the MARINA rate of P0.09 per kilo.

Charcoal

The only charcoal shipper from Masbate to Cebu was experiencing shut-outs twice a month, brought about by large shipments of copra by the copra trader who was at the same time a shipping agent of Sulpicio Lines. He was shipping an average of 200 sacks per week at 50 kgs./sack. Freight cost for charcoal from Masbate to Cebu was P12.42/sack, while arrastre rate at Masbate port was P3.25/sack.

Table A.12
Masbate-Manila Freight Charges for Fish Shipments
 (pesos)

Volume/Size	Sulpicio Lines		William Lines	
	Per Box	Per Kg.	Per Box	Per Kg.
Small (20-39 kgs)	100	2.56-5.00	120	3.10-P6.00
Medium (40-79 kgs)	140	1.77-3.50	160	2.00-P4.00
Large (80-100 kgs)	180	1.80-2.25	200	2.00-P2.50

Table A.13
Arrastre and Stevedoring Rates for Fish *
 (pesos)

	<u>Non-Palletized</u>		<u>Palletized</u>	
	Arrastre	Stev.	Arrastre	Stev.
Iced fish Thermo chest (box)	3.66	0.95	3.35	0.79
Double (box)	8.25	2.11	7.56	1.76
Crate-double	14.83	3.82	13.60	3.18
Big crate	46.37	7.62	42.50	6.35

Arrastre and stevedoring rates for fish differ by type of packaging.

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Handicrafts

A shipper of assorted handicrafts to Cebu, mostly hats, complained about the lack of "taremas" or protective sheets to cover cargoes from intense heat and rain. Upon unloading of cargoes from the vessel that arrived from Cebu, the tarema was being transferred to other commodities, e.g., sugar, flour and dry goods. During the rainy season, colored hats were soaked and soiled by the rains resulting in the rejection of his shipment.

Shut-outs were also being experienced as a result of shipping delays (5 hours) brought about by delays in loading at the port of origin (North Harbor). These delays occurred once or twice a month during the dry season and twice a month during the rainy season.

Freight cost was P15 per bundle and one bundle weighed approximately 30 kilograms, so that there was a charge of P0.50 a kilo. This rate was higher than the MARINA stipulated rate for handicrafts (Class A) of a maximum of P0.19 per kilo for the Masbate-Cebu route. PPA arrastre cost was P3.75 per bundle.

Consumer Goods

Shippers of consumer goods considered that breakage and spoilage losses were minor, but they nevertheless believed that such losses could be further reduced if all their cargoes would be shipped in containers. Shippers of dry goods, grocery items, and bottled cargo, were clamoring for additional containers to minimize spoilage and breakage losses.

ANNEX B

NORTHERN ISLAND PASSENGER SURVEY RESULTS

ANNEX B

NORTHERN ISLAND PASSENGER SURVEY RESULTS

Passenger surveys to assess the adequacy of Northern Island ferry and liner shipping services were conducted during the period May-August 1993. Surveys were conducted aboard 18 vessels to assess the adequacy of services on 13 routes. The LSRS survey schedule is shown in Table B.1.

Questions asked of passengers for the purposes of shipping service evaluation had to do with the following:

- Passenger travel purpose and frequency of traveling the route being evaluated.
- Adequacy of services to meet demand on the route
- Adherence to service schedule (service reliability)
- Space reservation system
- Baggage accommodation (including stowage space adequacy and baggage security).
- Operator concern for safety (as viewed by passengers)
- Vessel boarding procedure
- Physical accommodation standards
- Vessel crew attitude toward passengers (courtesy and helpfulness).
- Passenger baggage and extra charges paid (in addition to passage), if any.
- Service improvement, if any, over 2-year period
- Other services taken by passengers, and comparison of service standards.
- Seriousness of problem of traffic congestion during peak travel period.
- Passenger suggestions for service improvement.

Results of LSRS surveys are presented in tables B.2 through B.222. The tables that apply to each of the 13 routes surveyed are:

- Batangas-Calapan (B.2 through B.19)
- Batangas-Abra de Ilog (B.20 - B.37)
- Batangas-San Jose (B.38 - B.54)
- Batangas-Sablayan (B.55 - B.71)
- Batangas-Puerto Galera (B.72 - B.87)
- Sta. Cruz-Dalahican (B.88 - B.103)
- Balanañan-Dalahican (B.104 - B.119)
- Tabaco-Virac (B.120 - B.136)
- Odiongan-Batangas (B.137 - B.152)
- Manila-Masbate (B.153 - B.170)
- Masbate-Cebu (B.171 - B.187)
- Masbate-Bulan (B.188 - B.205)
- Masbate-Pilar (B.206 - B.222)

TABLE B.1

**Schedule of Vessel Surveys
and Number of Passengers Interviewed**

Routes Date of Interview	Name of Vessel/Company	Sample			Total
		1st	2nd	3rd	
Batangas - Calapan					
06/09-20/93	Diamond/MISC	22	-	41	63
06/08-14/93	Sto. Domingo/SDL	3	-	47	50
06/19/93	San Lorenzo Ruiz/SDL	2	-	29	31
06/10-17/93	Sta. Maria/VSL	-	-	55	55
Sub-total : Batangas - Calapan		27	-	172	199
Batangas - Abra de Ilog					
06/16-18/93	Don Vicente/MSL	9	22	45	76
06/18/93	Penafrancia/VSL	-	-	20	20
06/16/93	Dona Matilde/MSL	-	-	12	12
Sub-total : Batangas - Abra de Ilog		9	22	77	108
Batangas - San Jose					
06/16/93	Marian/VSL	-	-	50	50
Batangas - Sablayan					
05/07-11/93	Sta. Ana/NN	-	-	70	70
Batangas - Puerto Galera					
06/10-16/93	Queen AC VIII/ACSL	4	19	30	53
06/19/93	San Miguel de Ilijan/VSL	-	-	47	47
Sub-total : Batangas - Puerto Galera		4	19	77	100
Sta. Cruz - Dalahican					
05/18/93	John/VA	-	-	51	51
Balanacan - Dalahican					
05/20/93	Seagold/VSL	-	-	75	75
Tabaco - Virac					
05/21 & 27/93	Eugenia/BL	-	-	104	104
Odiongan - Batangas					
05/20/93	Kristopher/VSL	18	1	62	81
06/11 & 16/93		8	4	8	20
Sub-total : Odiongan - Batangas		26	5	70	101

Manila - Masbate 05/07-08/93	Cebu Princess/SLI	16	19	38	73
Masbate - Cebu 07/31/93	Cebu Princess/SLI	10	13	44	67
Masbate - Bulan 06/30-31/93	Masbate/SPC	-	-	22	22
Masbate - Pilar 08/01/93	Gloria	-	-	13	13
Total		92	78	863	1,033

Note :

MISC (Manila International Shipping Co. LTD), SDL (Sto. Domingo Lines), VSL (Viva Shipping Lines), MSL (Montenegro Shipping Lines), ACSL (AC Shipping Lines), VA (Viva Antipolo), NN (Negros Navigation), SLI (Sulpicio Lines), BL (Bicolandia Liner).

BATANGAS - CALAPAN ROUTE

TABLE B.2
PURPOSE OF TRAVEL

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
EMPLOYEE	2	4	6	10		5	5	10		2	2	6		3	3	5	2	14	16	8
BUSINESS		9	11	26		11	11	22	1	7	8	26	15	15	27	10	44	54	27	
VACATION	2	11	13	21		13	13	26		4	4	13	4	4	7	2	32	34	17	
STUDENT					1	6	7	14	1	5	6	19	16	16	29	2	27	29	15	
HOLIDAY	5	2	7	11		2	2	4		2	2	6	2	2	4	5	8	13	7	
OTHERS	1	4	5	8		4	4	8		9	9	29	9	9	16	1	26	27	14	
NO ANSWER	3	9	12	19	2	6	8	16					6	6	11	5	21	26	13	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.3
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
2 times a day	1		1	2														1	1	1
12-18 times a month	1		1	2					1		1	3	1	1	2	2	1	3	2	
5-8 times a month		2	2	3		2	2	4					1	1	2			5	3	
2-4 times a month	7	9	16	25		11	11	22		6	6	19	33	33	60	7	59	66	33	
10-18 times a year	8	7	15	24		12	12	24	1	14	15	48	16	16	29	9	49	58	29	
2-8 times a year	5	9	14	22		1	1	2		2	2	6			5	12	17	9		
Occasionally		2	2	3									1	1	2			3	2	
No answer		12	12	19	3	21	24	48		7	7	23	3	3	5	3	43	46	23	
Total	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.4
SERVICES ADEQUATE FOR DEMAND

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
YES	19	33	52	83	1	36	37	74		11	11	35	43	43	78	20	123	143	72	
NO		1	1	2	1	4	5	10	2	17	19	61	3	3	5	3	25	28	14	
NO ANSWER	3	7	10	16	1	7	8	16		1	1	3	9	9	16	4	24	28	14	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.5
RELIABLE ON TIME

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
YES	20	30	50	79	1	36	37	74		18	18	58	42	42	76	21	126	147	74	
NO	1	5	6	10	1	6	7	14	2	11	13	42	2	2	4	4	24	28	14	
NO ANSWER	1	6	7	11	1	5	6	12					11	11	20	2	22	24	12	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.6
GOOD SPACE RESERVATION

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
YES	15	22	37	59	1	33	34	68	1	9	10	32	17	17	31	17	81	98	49	
NO	1	4	5	8	1	5	6	12	1	18	19	61	14	14	25	3	41	44	22	
NO ANSWER	6	15	21	33	1	9	10	20		2	2	6	24	24	44	7	50	57	29	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.7
GOOD BAGGAGE ACCOMMODATION/SECURITY

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
YES	13	21	34	54	1	33	34	68		14	14	45	12	12	22	14	80	94	47	
NO	5	13	18	29	1	5	6	12	2	14	16	52	34	34	62	8	66	74	37	
NO ANSWER	4	7	11	17	1	9	10	20		1	1	3	9	9	16	5	26	31	16	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.8
ADEQUATE CONCERN FOR SAFETY

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	
YES	17	26	43	68	1	32	33	66		10	10	32	43	43	78	18	111	129	65	
NO		3	3	5	1	7	8	16	2	17	19	61	5	5	9	3	32	35	18	
NO ANSWER	5	12	17	27	1	8	9	18		2	2	6	7	7	13	6	29	35	18	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

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**TABLE B.9
ORGANIZED-BOARDING PROCEDURE**

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA			TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
YES	12	19	31	49		30	30	60		10	10	32	25	25	45	12	84	96	48
NO		5	5	8	1	8	9	18	2	17	19	61	17	17	31	3	47	50	25
NO ANSWER	10	17	27	43	2	9	11	22		2	2	6	13	13	24	12	41	53	27
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100

**TABLE B.10
ACCOMMODATION STANDARDS**

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA			TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
FOOD/CANTEEN																			
UNACCEPTABLE						3	3	6		1	1	3				2	6	8	4
POOR	4	2	6	10		15	15	30	2	14	16	52	2	2	4	6	33	39	20
FAIR	10	24	34	54	1	22	23	46		7	7	23	16	16	29	11	69	80	40
GOOD/EXCEL.	5	7	12	19	1	6	7	14		4	4	13	31	31	56	6	48	54	27
NO ANSWER	1	6	7	11	1	1	2	4		3	3	10	6	6	11	2	16	18	9
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
TOILET/SANITARY FACILITIES																			
UNACCEPTABLE	2	3	5	8		10	10	20		5	5	16	3	3	5	2	21	23	12
POOR	5	7	12	19	2	23	25	50	2	15	17	55	16	16	29	9	61	70	35
FAIR	13	20	33	52		11	11	22		5	5	16	29	29	53	13	65	78	39
GOOD/EXCEL.		9	9	14		3	3	6		3	3	10	4	4	7		19	19	10
NO ANSWER	2	2	4	6	1	1	2	4		1	1	3	3	3	5	3	6	9	5
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
BEDDINGS/BLANKETS																			
UNACCEPTABLE	2		2	3		3	3	6		2	2	6	1	1	2	2	6	8	4
POOR	2	1	3	5		3	3	6		8	8	26	1	1	2	2	13	15	8
FAIR	5	3	8	13		8	8	16		3	3	10	4	4	7	5	18	23	12
GOOD/EXCEL.		4	4	6						2	2	6	7	7	13		13	13	7
NO ANSWER	13	33	46	73	3	33	36	72	2	14	16	52	42	42	76	18	122	140	70
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
LEISURE FACILITIES																			
UNACCEPTABLE	2		2	3		1	1	2		1	1	3	1	1	2	2	3	5	3
POOR	1	4	5	8	1	2	3	6		12	12	39	2	2	4	2	20	22	11
FAIR	10	8	18	29	1	9	10	20	1	11	12	39	4	4	7	12	32	44	22
GOOD/EXCEL.	3	5	8	13						2	2	6	2	2	4	3	9	12	6
NO ANSWER	6	24	30	48	1	35	36	72	1	3	4	13	46	46	84	8	108	116	58
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100

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TABLE B.10
(Continued)
ACCOMMODATION STANDARDS

	MV DIAMOND				MV S/O DOMINGO				MV SAN LORENZO RUZ				MV STA MARIA			TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
VENTILATION																			
UNACCEPTABLE	1		1	2		1	1	2		2	2	6				1	3	4	2
POOR	1	2	3	5	1	2	3	6	1	8	9	29	5	5	9	3	17	20	10
FAIR	9	8	17	27	1	9	10	20	1	14	15	48	13	13	24	11	44	55	28
GOOD/EXCEL.	9	20	29	46						2	2	6	24	24	44	9	46	55	28
NO ANSWER	2	11	13	21	1	35	36	72		3	3	10	13	13	24	3	62	65	33
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
CREW'S COURTESY/ASSISTANCE																			
UNACCEPTABLE	2	1	3	5		1	1	2	1	3	4	13				3	5	8	4
POOR		5	5	8		16	16	32	1	12	13	42	7	7	13	1	40	41	21
FAIR	6	5	11	17	2	21	23	46		9	9	29	32	32	58	8	67	75	38
GOOD/EXCEL.	13	24	37	59		2	2	4		2	2	6	8	8	15	13	36	49	25
NO ANSWER	1	6	7	11	1	7	8	16		3	3	10	8	8	15	2	24	26	13
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
DRINKING FOUNTAINS ETC.																			
UNACCEPTABLE	2	1	3	5		2	2	4	1	3	4	13				3	6	9	5
POOR	4	3	7	11	2	7	9	18	1	15	16	52	7	7	13	7	32	39	20
FAIR	9	16	25	40		5	5	10		7	7	23	34	34	62	9	62	71	36
GOOD/EXCEL.	2	7	9	14		3	3	6		3	3	10	2	2	4	2	15	17	9
NO ANSWER	5	14	19	30	1	30	31	62		1	1	3	12	12	22	6	57	63	32
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
SPACE TO MOVE AROUND																			
UNACCEPTABLE	2		2	3					1		1	3				3		3	2
POOR		2	2	3	2	4	6	12	1	7	8	26	6	6	11	3	19	22	11
FAIR	10	10	20	32		25	25	50		18	18	58	15	15	27	10	68	78	39
GOOD/EXCEL.	9	18	27	43		5	5	10		1	1	3	24	24	44	9	48	57	29
NO ANSWER	1	11	12	19	1	13	14	28		3	3	10	10	10	18	2	37	39	20
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100

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**TABLE B.11
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA			TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%
BAGS																			
1-2	15	29	15	27	2	38	40	93	2	23	25	66	27	36	97	19	117	136	79
3-4	1	1	1	20		1	1	100		3	3	60	8	7	58	1	13	14	61
BOXES																			
1-2	2	8	2	4		3	3	7	1	4	5	13	8	8	22	3	23	26	15
3-4	2	1	2	40					1	1	2	40	4	4	33	3	6	9	39
5 Above						1	1	100					1	1	100		2	2	100
SACKS																			
1-2	1		1	2									2	2	5	1	2	3	2
TOTAL																			
1-2 Baggage	18	37	55	87	2	41	43	86	3	35	38	86	37	37	67	23	150	173	82
3-4 Baggage	3	2	5	8		1	1	2	1	4	5	11	12	12	22	4	19	23	11
5 Above Baggage						1	1	2					1	1	2		2	2	1
NO ANSWER	1	2	3	5	1	4	5	10		1	1	2	5	5	9	2	12	14	7
TOTAL	22	41	63	100	3	47	50	100	4	40	44	100	55	55	100	29	183	212	100

**TABLE B.12
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA			TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	FIRST CLASS	THIRD CLASS	TOTAL	%
WEIGHT																			
1-10 kilos	3	3	6	10		3	3	6		19	19	61				3	25	28	14
11-25 kilos						1	1	2		2	2	6					3	3	2
30-50 kilos						8	8	16	2	2	4	13	1	1	2	2	11	13	7
10-30 lbs.	2	3	5	8									1	1	2	2	4	6	3
50 lbs.	2	1	3	5		2	2	4								2	3	5	3
Hand carry													1	1	2		1	1	1
No answer	15	34	49	78	3	33	36	72		6	6	19	52	52	95	18	125	143	72
Total	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100
EXTRA CHARGES PAID																			
None	1		1	2		4	4	8		2	2	6	5	5	9	1	11	12	6
No Answer	21	41	62	98	3	43	46	92	2	27	29	94	50	50	91	26	161	187	94
Total	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100

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TABLE B.13
ADEQUATE BAGGAGE STORAGE

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
YES	10	19	29	46	1	7	8	16		10	10	32	5	5	9	11	41	52	26	
NO	6	16	22	35	1	11	12	24	2	18	20	65	44	44	80	9	89	98	49	
NO ANSWER	6	6	12	19	1	29	30	60		1	1	3	6	6	11	7	42	49	25	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.14
IS BAGGAGE STORAGE SECURED

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
YES	12	13	25	39		3	3	6		5	5	16	9	9	16	12	30	42	21	
NO	6	23	29	46	1	12	13	26	2	18	20	65	40	40	73	9	93	102	51	
NO ANSWER	4	5	9	14	2	32	34	68		6	6	19	6	6	11	6	49	55	28	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.15
CHANGE OF SERVICES OVER THE PAST TWO YEARS

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
YES	10	14	24	38	1	4	5	10		5	5	16	29	29	53	11	52	63	32	
NO	10	19	29	46	2	34	36	72	2	22	24	77	19	19	35	14	94	108	54	
NO ANSWER	2	8	10	16		9	9	18		2	2	6	7	7	13	2	26	28	14	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.16
OTHER COMPANY/VESSEL TRIED FOR SAME ROUTE AND
COMPARISON ADEQUACY AND QUALITY OF SERVICES

Company / vessel	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
Viva Shipp. Lines/MV Sta. Maria	16	33	49	78		11	11	22	1	1	2	6	8	8	15	17	53	70	35	
Sto. Domingo Shipping Lines	2	2	4	6						2	2	6	19	19	35	2	23	25	13	
MV Maynilad											1	3							1	
Manda International					1	1	2	4		2	2	6	6	6	11	1	9	10	5	
No answer	4	6	10	16	2	35	37	74	1	23	24	77	22	22	40	7	86	93	47	
Total	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	
Comparison of Adequacy/ Quality of Services																				
Services about the same						1	1	2					3	3	5		4	4	2	
This company performs better													4	4	7		4	4	2	
Other company performs better													2	2	4		2	2	1	
No answer	22	41	63	100	3	45	49	98	2	29	31	100	46	46	84	27	162	189	95	
Total	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

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**TABLE B.17
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS**

ORIGIN	DESTINATION	NO. OF TIMES	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
			FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
Batangas	Puerto Galera	Once	2	2	4	6							1	3					2	3	5	3
		2-4 times		5	5	8		2	2	4						1	1	2			8	4
Calapan	Batangas	1-7 times/yr.	3	6	9	14	1	2	3	6		1	1	3	1	1	2		4	10	14	7
		12 times/yr.	2		2	3													2			1
		36 times/yr.		1	1	2									1	1	2				2	1
Lucena	Marinduque		2		2	3						1	1	3		2			2	2	2	1
Abra	Batangas		1	1	2	3		1	1	2								2	1	3	2	
Batangas	San Jose	Once										1	1	3	2	2	4	1	4	5	3	
Calapan	Marinduque	Once										2	2	6					3	3	2	
Davao City	Marinduque	Once										2	2	6					2	2	1	
Calapan	Abra											2	2	6					2	2	1	
Batangas	Isla Verde	Can't count												1	1	2			1	1	1	
No Answer			12	26	38	60	2	42	44	88	2	21	23	74	46	46	84	16	135	151	76	
Total			22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

**TABLE B.18
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM**

	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	6	15	24	1	7	8	16	2	22	24	77	20	20	36	12	55	67	34	
NO	7	25	32	51	1	28	29	58		7	7	23	24	24	44	8	64	92	46	
NO ANSWER	6	10	16	25	1	12	13	26					11	11	20	7	33	40	20	
TOTAL	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100	27	172	199	100	

TABLE B.19
PASSENGER SUGGESTIONS

SUGGESTIONS	MV DIAMOND				MV STO. DOMINGO				MV SAN LORENZO RUIZ				MV STA. MARIA				TOTAL			
	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	THIRD CLASS	TOTAL	% SHARE
Avoid selling of liquor inside the vessel										2	2	6						2	2	
Cleanliness of drinking fountains										2	2	6						2	2	
Crew must be courteous						3	5	10			3	10		4	4	7			12	12
Exact capacity of passengers to a certain vessel						1	1	2											1	1
Improve good services										1	1	3							1	1
Improve slow voyages										1	1	3							1	1
Provide bedding/baggage storage & gadgets for the passengers																			1	1
Provide leisure facilities/space reservation						3	3	6			2	6							5	5
Provide trash cans/seats						2	2	4											2	2
Put rules and regulations to follow														4	4	7			4	4
Additional vessel to cut monopoly for Viva	5	2	7	11	1	2	3	6											1	1
Change the time interval of travel		1	1	2						1	1	3					6		5	11
Improve food services	1		1	2															1	1
Lessen the 100% of ticket surcharge			1	2													1			1
Maintain cleanliness of the vessel	8	11	19	30	1	26	27	54	1	6	7	23	41	41	75		10		84	94
More ticket booth	3	2	5	8		1	1	2						2	2	4	3		5	8
No overloading			1	2															1	1
Strict in the implementation of rules and regulations (arrival & departure)																			3	3
No Answer/no suggestion		2	2	3		1	1	2						1	1	2			4	4
Total	5	21	26	41	1	5	6	12	1	8	9	29	1	1	2		7		35	42
	22	41	63	100	3	47	50	100	2	29	31	100	55	55	100		27		172	199

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BATANGAS - ABRA DE ILOG ROUTE

TABLE B.20
PURPOSE OF TRAVEL

	MV DON VICENTE					MV PENA FRANCLA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
EMPLOYEE		1	1	2	3								1	1	2	2
BUSINESS	1		1	2	3	5	5	25	2	2	17					
VACATION	2	4	9	15	20	2	2	10	3	3	25	2	4	14	20	
STUDENT	2	2	17	21	28	5	5	25	2	2	17	2	2	24	28	
HOLIDAY		4	3	7	9	2	2	10					4	5	9	
OTHERS		10	13	23	30				5	5	42		10	18	28	
NO ANSWER	4	1	1	6	8	6	6	30				4	1	7	12	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	

TABLE B.21
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

	MV DON VICENTE					MV PENA FRANCLA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
3 - 4 times a month			3	3	4										3	3
Twice a month	1		6	7	9										6	7
Once a month	1	5	16	22	29	5	5	25				1			21	27
4-10 times a year		3	4	7	9	1	1	5					3	5	8	7
2-3 times a year	1	3	6	10	13	1	1	5				1	3	7	11	
Once a year		3	5	8	11	1	1	5					3	6	9	
No answer	6	8	5	19	25	12	12	60	12	12	100			3	6	
Total	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	

TABLE B.22
SERVICES ADEQUATE FOR DEMAND

	MV DON VICENTE					MV PENA FRANCLA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	8	4	9	21	28	10	10	50	2	2	17	8	4	21	33	
NO		11	35	46	61				9	9	75		11	44	55	
NO ANSWER	1	7	1	9	12	10	10	50	1	1	8	1	7	12	20	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	

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TABLE B.23
RELIABLE AND ON TIME

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	7	5	27	39	51	8	8	40	12	12	100	7	5	47	59	55
NO		9	17	26	34	1	1	5					9	18	27	25
NO ANSWER	2	8	1	11	14	11	11	55				2	8	12	22	20
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.24
GOOD SPACE RESERVATION

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	6	4	15	25	33	9	9	45	7	7	58	6	4	31	41	38
NO	2	9	27	38	50	1	1	5	4	4	33	2	9	32	43	40
NO ANSWER	1	9	3	13	17	10	10	50	1	1	8	1	9	14	24	22
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.25
GOOD BAGGAGE ACCOMMODATION/SECURITY

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	8	9	18	35	46	9	9	45	7	7	58	8	9	34	51	47
NO		11	26	37	49	1	1	5	4	4	33		11	31	42	39
NO ANSWER	1	2	1	4	5	10	10	50	1	1	8	1	2	12	15	14
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.26
ADEQUATE CONCERN FOR SAFETY

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	9	10	28	37	9	9	45	5	5	42	9	9	24	42	39
NO		11	33	44	58	1	1	5	6	6	50		11	40	51	47
NO ANSWER		2	2	4	5	10	10	50	1	1	8		2	13	15	14
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

**TABLE B.27
ORGANIZED BOARDING PROCEDURE**

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%
YES	5	6	22	33	43	10	10	50	7	7	58	5	6	39	50	46
NO			19	29	38				2	2	17		10	21	31	29
NO ANSWER	4	6	4	14	18	10	10	50	3	3	25	4	6	17	27	25
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

**TABLE B.28
ACCOMMODATION STANDARDS**

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%
FOOD/CANTEEN																
UNACCEPTABLE			1	1	1											
POOR	6	11	30	47	62				10	10	83			1	1	1
FAIR	2	8	7	17	22	15	15	75				6	11	40	57	53
GOOD/EXCEL		1		1	1	4	4	20				2	8	22	32	30
NO ANSWER	1	2	7	10	13	1	1	5	2	2	17		1	4	5	5
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100
TOILET/SANITARY FACILITIES																
UNACCEPTABLE		2		2	3											
POOR	7	9	34	50	66	11	11	55	10	10	83		2		2	2
FAIR	2	7	5	14	18	5	5	25	1	1	8	7	9	55	71	66
GOOD/EXCEL		2	2	4	5	3	3	15				2	7	11	20	19
NO ANSWER		2	4	6	8	1	1	5	1	1	8		2	5	7	6
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100
BEDDINGS/BLANKETS																
UNACCEPTABLE																
POOR	4		7	11	14	2	2	10								
FAIR	1		5	6	8	14	14	70				4		9	13	12
GOOD/EXCEL			2	2	3	1	1	5				1		19	20	19
NO ANSWER	4	22	31	57	75	3	3	15						3	3	3
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	46	72	67
LEISURE FACILITIES																
UNACCEPTABLE	2			2	3				1	1	8	2		1	3	3
POOR	3	8	20	31	41	2	2	10	1	1	8	3	8	23	34	31
FAIR	4	3	5	12	16	12	12	60				4	3	17	24	22
GOOD/EXCEL						3	3	15						3	3	3
NO ANSWER		11	20	31	41	3	3	15	10	10	83			3	3	3
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

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TABLE B.28
(Continued)
ACCOMMODATION STANDARDS

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATH DE			TOTAL					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	
VENTILATION																	
UNACCEPTABLE	1			1	1				1	1	8	1			1	2	2
POOR	3	5	20	28	37	3	3	15	.			3	5	23	31	29	
FAIR	5	7	9	21	28	12	12	60	10	10	83	5	7	31	43	40	
GOOD/EXCEL			1	1	1	4	4	20						5	5	5	
NO ANSWER		10	15	25	33	1	1	5	1	1	8		10	17	27	25	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100	
CREW'S COURTESY/ASSISTANCE																	
UNACCEPTABLE	2			2	3							2			2	2	
POOR		3	10	13	17	2	2	10	3	3	25		3	15	18	17	
FAIR	7	15	32	54	71	13	13	65	8	8	67	7	15	53	75	69	
GOOD/EXCEL		3	1	4	5	3	3	15					3	4	7	6	
NO ANSWER		1	2	3	4	2	2	10	1	1	8		1	5	6	6	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100	
DRINKING FOUNTAINS ETC.																	
UNACCEPTABLE			2	2	3	3	3	15						5	5	5	
POOR	5	10	31	46	61	7	7	35	6	6	50	5	10	44	59	55	
FAIR	3	8	9	20	26	6	6	30	5	5	42	3	8	20	31	29	
GOOD/EXCEL		1		1	1								1		1	1	
NO ANSWER	1	3	3	7	9	4	4	20	1	1	8	1	3	8	12	11	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100	
SPACE TO MOVE AROUND																	
UNACCEPTABLE																	
POOR	4	6	19	29	38	4	4	20	5	5	42	4	6	28	38	35	
FAIR	5	12	21	38	50	10	10	50	6	6	50	5	12	37	54	50	
GOOD/EXCEL		1	2	3	4	2	2	10					1	4	5	5	
NO ANSWER		3	3	6	8	4	4	20	1	1	8		3	8	11	10	
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100	

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TABLE B.29
BAGGAGE CARRIED BY PASSENGERS

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
BAGS																
1-2	7	10	41	58	97	17	17	89	12	12	100	7	10	41	58	64
3-4	2	2	2	6	100							2	2	2	6	100
5 Above		4		4	27								4		4	27
BOXES																
1-2						2	2	11						2	2	2
5 Above		5		5	33								5		5	33
SACKS																
1-2		1		1	2								1		1	1
5 Above		5		5	33								5		5	33
CANS																
1-2		1		1	2								1		1	1
5 Above		1		1	7								1		1	7
TOTAL																
1-2 Baggage	7	12	41	60	70	19	19	95	12	12	100	7	12	72	91	77
3-4 Baggage	2	2	2	6	7							2	2	2	6	5
5 Above Baggage		15		15	17								15		15	13
NO ANSWER		3	2	5	6	1	1	5						3	3	5
TOTAL	9	32	45	86	100	20	20	100	12	12	100	9	32	77	118	100

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TABLE B.30
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
WEIGHT																
1-10 kilos	1	5	29	35	46	1	1	5	5	5	42	1	5	35	41	38
11-20 kilos		5	7	12	16				2	2	17		5	9	14	13
No answer	8	12	9	29	38	19	19	95	5	5	42	8	12	33	53	49
Total	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100
EXTRA CHARGES PAID																
No extra charges		9	15	24	32								9	15	24	22
Big baggage is equivalent to a passenger fare			14											14	14	13
No answer	9	13	16	38	50	20	20	100	12	12	100	9	13	48	70	65
Total	9	22	45	76	143	20	20	100	12	12	100	9	22	77	108	100

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TABLE B.31
ADEQUATE BAGGAGE STORAGE

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES		4	23	27	36	1	1	5	10	10	83		4	34	38	35
NO	3	12	20	35	46	1	1	5				3	12	21	36	33
NO ANSWER	6	6	2	14	18	18	18	90	2	2	17	6	6	22	34	31
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.32
IS BAGGAGE STORAGE SECURED

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	5	6	21	27	40	17	17	85	12	12	100	5	6	50	61	56
NO		9	21	30	45	1	1	5					9	22	31	29
NO ANSWER	4	7	3	10	15	2	2	10				4	7	5	16	15
TOTAL	9	22	45	67	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.33
CHANGE OF SERVICES OVER THE PAST TWO YEARS

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	1	3	6	8	10	10	50				2	1	13	16	15
NO	5	13	30	48	63				10	10	83	5	13	40	58	54
NO ANSWER	2	8	12	22	29	10	10	50	2	2	17	2	8	24	34	31
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.24
OTHER COMPANY/VESSEL TRIED FOR SAME ROUTE AND
COMPARISON OF ADEQUACY AND QUALITY OF SERVICES

Company / Vessel	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Penafancia/Viva Shipp. Lines	1	10	26	37	49	14	14	70				1	10	40	51	47
Montenegro Shipping Lines						2	2	10						2	2	2
No answer	8	12	19	39	51	4	4	20	12	12	100					
Total	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100
Comparison of Adequacy/Quality of Service																
Services about the same																
Only Penafancia is bigger		5	6	11	14								5	6	11	10
Viva has better services			1	1	1									1	1	1
Just the same	1		1	2	3				1	1	8	1		2	3	3
No answer	8	17	37	62	82	20	20	100	11	11	92	8	17	68	93	86
Total	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE 35
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS

ORIGIN	DESTINATION	NO. OF TIMES	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
			FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Abra de Ilog	Batangas			1		1	1											
Batangas	Puerto Galera	Once a year		2	4	6	8								1		1	1
Batangas	Calapan	2 times a year			11	11	14							2	4	6	6	
San Jose	Manila	15 times a year									4	4	33			15	14	
No Answer			9	19	30	58	76	20	20	100	7	7	58	9	19	57	85	79
Total			9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.36
CONGESTED TRAVEL DURING PEAK SEASON BEEN A SERIOUS PROBLEM

	MV DON VICENTE					MV PENAFRANCIA			MV DONA MATILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES		13	21	34	45											
NO	7	1	21	29	38	2	2	10	12	12	100		13	21	34	31
NO ANSWER	2	8	3	13	17	18	18	90				7	1	35	43	40
TOTAL	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

TABLE B.37
PASSENGER SUGGESTIONS

SUGGESTIONS	MV DON VICENTE					MV PENAFRANCIA			MV DOÑA MARILDE			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	THIRD CLASS	TOTAL	%	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	%
Make sure to have adequate safety measures for all kinds of weather	2			2	3										2	2
Maintain the cleanliness of the toilet/vessel		5	14	19	25	14	14	70	1	1	8	2			2	2
Provide drinking fountains		2		2	3								5	29	34	31
Provide ventilation on the third class			1	1	1								2		2	2
Have an organized procedure during the arrival of the passengers													1		1	1
Don't overload the vessel		2		2	3								2		2	2
Provide water for the toilet		3	1	4	5	1	1	5					3	2	5	5
Provide life jackets		1	2	3	4								1	2	3	3
Have baggage storage for the security of the baggages			2	2	3									2	2	2
Fair ordinance to the passengers			2	2	3	1	1	5							3	3
Strict time schedule of departure & provide service information														2	2	2
Put suggestion boxes inside the vessel & strict implementation of rules & regulations	1		2	3	4				1	1	8	1		3	4	4
Additional vessel so that it can accommodate more passengers			3	3	4										3	3
Improve the standard of passenger service			8	8	11				4	4	33				12	11
Stop monopolizing the shipping lines here	1		1	2	3							1		1	2	2
Upgrade the services & not just gaining profit			2	2	3				2	2	17			4	4	4
No answer			2	2	3				3	3	25				5	5
Total	5	8	4	17	22	4	4	20	1	1	8	5	8	9	22	20
	9	22	45	76	100	20	20	100	12	12	100	9	22	77	108	100

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BATANGAS - SAN JOSE ROUTE

**TABLE B.38
PURPOSE OF TRAVEL**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
EMPLOYEE	4	8
BUSINESS	21	42
STUDENT	2	4
VACATION	12	24
OTHERS	10	20
NO ANSWER	1	2
TOTAL	50	100

**TABLE B. 39
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
1-4 times a month	25	50
3-10 times a year	7	14
Twice a year	8	16
Once a year	5	10
No Answer	5	10
Total	50	100

**TABLE B. 40
SERVICES ADEQUATE FOR DEMAND**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	28	56
NO	19	38
NO ANSWER	3	6
TOTAL	50	100

**TABLE B. 41
RELIABLE AND ON TIME**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	38	76
NO	3	6
NO ANSWER	9	18
TOTAL	50	100

TABLE B. 42
GOOD SPACE RESERVATION

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	34	68
NO	11	22
NO ANSWER	5	10
TOTAL	50	100

TABLE B. 43
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	35	70
NO	9	18
NO ANSWER	6	12
TOTAL	50	100

TABLE B. 44
ADEQUATE CONCERN FOR SAFETY

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	35	70
NO	8	16
NO ANSWER	7	14
TOTAL	50	100

TABLE B. 45
ORGANIZED BOARDING PROCEDURE

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	28	56
NO	9	18
NO ANSWER	13	26
TOTAL	50	100

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**TABLE B. 46
ACCOMMODATION STANDARDS**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
UNACCEPTABLE	2	4
POOR	8	16
FAIR	29	58
GOOD/EXCEL	4	8
NO ANSWER	7	14
TOTAL	50	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	2	4
POOR	13	26
FAIR	31	62
GOOD/EXCEL	1	2
NO ANSWER	3	6
TOTAL	50	100
BEDDINGS/BLANKETS		
UNACCEPTABLE	6	12
POOR	11	22
FAIR	21	42
GOOD/EXCEL	1	2
NO ANSWER	11	22
TOTAL	50	100
LEISURE FACILITIES		
UNACCEPTABLE	7	14
POOR	1	8
FAIR	25	50
GOOD/EXCEL	0	0
NO ANSWER	14	28
TOTAL	50	100
VENTILATION		
UNACCEPTABLE	3	6
POOR	2	4
FAIR	31	62
GOOD/EXCEL	5	10
NO ANSWER	9	18
TOTAL	50	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	2	4
POOR	8	16
FAIR	31	62
GOOD/EXCEL	5	10
NO ANSWER	4	8
TOTAL	50	100
DRINKING FOUNTAINS, ETC.		
UNACCEPTABLE	2	4
POOR	8	16
FAIR	31	62
GOOD/EXCEL	5	10
NO ANSWER	4	8
TOTAL	50	100
SPACE TO MOVE AROUND		
UNACCEPTABLE	6	12
POOR	1	2
FAIR	31	62
GOOD/EXCEL	2	4
NO ANSWER	10	20
TOTAL	50	100

**TABLE B. 47
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV MARIAN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	23	82
3-4	2	100
BOXES		
1-2	5	18
5 Above	5	100
TOTAL		
1-2 Baggage	28	56
3-4 Baggage	2	4
5 above Baggage	5	10
NO ANSWER	15	30
TOTAL	50	100

**TABLE B. 48
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV MARIAN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1-4 kilos	1	2
5-15 kilos	14	28
16-20 kilos	5	10
20-50 kilos	7	14
No answer	23	46
TOTAL	50	100
EXTRA CHARGES PAID		
P38.00	1	2
P340.00 (jeep)	1	2
P310.00	1	2
None	14	28
No answer	33	66
TOTAL	50	100

**TABLE B. 49
ADEQUATE BAGGAGE STORAGE**

	MV MARIAN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	26	52
NO	15	30
NO ANSWER	9	18
TOTAL	50	100

**TABLE B. 50
IS BAGGAGE STORAGE SECURED**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	24	48
NO	17	34
NO ANSWER	9	18
TOTAL	50	100

**TABLE B. 51
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	14	28
NO	31	62
NO ANSWER	5	10
TOTAL	50	100

**TABLE B. 52
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS**

MV MARIAN (3rd Class Only)				
ORIGIN	DESTINATION	NO. OF TIMES	NO. OF PASSENGERS	% SHARE
Manila	Cebu	Once a year	1	2
Batangas	Mindoro	Once a year	1	2
Batangas	San Jose		2	4
Manila	San Jose		4	8
Batangas	Calapan	Once a year	7	14
Batangas	Leyte	Thrice a year	1	2
San Jose	Mindoro	Twice a year	1	2
Batangas	Puerto Galera	Once a year	4	8
No Answer			29	58
Total			50	100

**TABLE B. 53
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM**

MV MARIAN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	16	32
NO	26	52
NO ANSWER	8	16
TOTAL	50	100

TABLE B. 54
PASSENGER SUGGESTIONS

SUGGESTIONS	MV MARIAN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
Additional comfort room	2	4
All passengers must have seats	2	4
Be on time	2	4
Don't increase the passenger fare	5	10
First the stairway and the sanitary facilities	1	2
Improve the cleanliness inside the vessel	3	6
No monopoly of sea transportation	1	2
Organize disembarking procedure	3	6
Overloading passenger should be avoided	2	4
Provide bedding & leisure facilities	14	28
Provide drinking fountains	6	12
Provide sufficient ship to the passenger	2	4
Upgrade/check the system of service	1	2
Why can we just buy ticket aboard the ship	4	8
No Answer	2	4
Total	50	100

BATANGAS - SABLAYAN ROUTE

TABLE B.55
PURPOSE OF TRAVEL

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
EMPLOYEE	3	4
BUSINESS	18	26
STUDENT	5	7
OTHERS	17	24
VACATION	20	29
NO ANSWER	7	10
TOTAL	70	100

TABLE B.56
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
Weekly	6	9
2-3 times a month	4	6
12 times a year	3	4
4-8 times a year	7	10
1-3 times a year	29	41
No answer	21	30
Total	70	100

TABLE B.57
SERVICES ADEQUATE FOR DEMAND

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	29	41
NO	40	57
NO ANSWER	1	1
TOTAL	70	100

TABLE B.58
RELIABLE AND ON TIME

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	48	69
NO	21	30
NO ANSWER	1	1
TOTAL	70	100

TABLE B.59
GOOD SPACE RESERVATION

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	48	69
NO	20	29
NO ANSWER	2	3
TOTAL	70	100

TABLE B.60
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	42	60
NO	22	31
NO ANSWER	6	9
TOTAL	70	100

TABLE B.61
ADEQUATE CONCERN FOR SAFETY

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	45	64
NO	17	24
NO ANSWER	8	11
TOTAL	70	100

TABLE B.62
ORGANIZED BOARDING PROCEDURE

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	41	59
NO	21	30
NO ANSWER	8	11
TOTAL	70	100

TABLE R.63
ACCOMMODATION STANDARDS

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
UNACCEPTABLE	4	6
POOR	30	43
FAIR	18	26
GOOD/EXCEL	5	7
NO ANSWER	13	19
TOTAL	70	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	6	9
POOR	30	43
FAIR	29	41
NO ANSWER	5	7
TOTAL	70	100
BEDDINGS/BLANKETS		
UNACCEPTABLE	11	16
POOR	17	24
FAIR	4	6
GOOD/EXCEL	2	3
NO ANSWER	36	51
TOTAL	70	100
LEISURE FACILITIES		
UNACCEPTABLE	5	7
POOR	19	27
FAIR	6	9
GOOD/EXCEL.	1	1
NO ANSWER	39	56
TOTAL	70	100
VENTILATION		
UNACCEPTABLE	2	3
POOR	17	24
FAIR	30	43
GOOD/EXCEL.	5	7
NO ANSWER	16	23
TOTAL	70	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	1	1
POOR	19	27
FAIR	38	54
GOOD/EXCEL.	6	9
NO ANSWER	6	9
TOTAL	70	100
DRINKING FOUNTAINS, ETC.		
UNACCEPTABLE	2	3
POOR	21	30
FAIR	28	40
GOOD/EXCEL.	2	3
NO ANSWER	17	24
TOTAL	70	100
SPACE TO MOVE AROUND		
UNACCEPTABLE	3	4
POOR	13	19
FAIR	36	51
GOOD/EXCEL.	6	9
NO ANSWER	12	17
TOTAL	70	100

**TABLE B.64
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV STA. ANA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	21	58
3-4	10	50
BOXES		
1-2	11	31
3-4	3	15
5 Above	4	100
SACKS		
1-2	4	11
3-4	7	35
TOTAL		
1-2 Baggage	36	51
3-4 Baggage	20	29
5 above Baggage	4	6
NO ANSWER	10	14
TOTAL	70	100

**TABLE B.65
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV STA. ANA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
10-15 kilos	21	30
20 kilos	2	3
50 kilos	2	3
65 kilos	2	3
No answer	43	61
TOTAL	70	100
EXTRA CHARGES PAID		
P250.00 porter	1	1
No answer	69	99
TOTAL	70	100

**TABLE B.66
ADEQUATE BAGGAGE STORAGE**

	MV STA. ANA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	29	41
NO	34	49
NO ANSWER	7	10
TOTAL	70	100

**TABLE B.67
IS BAGGAGE STORAGE SECURED**

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	23	33
NO	40	57
NO ANSWER	7	10
TOTAL	70	100

**TABLE B.68
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	20	29
NO	40	57
NO ANSWER	10	14
TOTAL	70	100

**TABLE B.69
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS**

MV STA. ANA (3rd Class Only)				
ORIGIN	DESTINATION	NO. OF TIMES	NO. OF PASSENGERS	% SHARE
Batangas	Palawan	Once a year	2	3
	Puerto Galera	Once a year	6	9
	San Jose	Once a year	2	3
	Calapan	Once a year	1	1
		Twice a year	1	1
Calapan	Batangas	Once a year	1	1
		Twice a year	1	1
No Answer			56	80
Total			70	100

**TABLE B.70
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM**

MV STA. ANA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	28	40
NO	23	40
NO ANSWER	14	20
TOTAL	70	100

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TABLE B.71
PASSENGER SUGGESTIONS

SUGGESTIONS	MV STA. ANA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
Provide first class accommodation	4	6
Why do they charge extra amount (P100) when buying ticket inside the vessel	1	1
Improve crew's courtesy	3	4
Improve the cleanliness inside the vessel	6	9
Don't increase the passenger fare	1	1
Additional ferry boat	5	7
Provide bedding/drinking fountains	38	54
Listen to the passenger suggestions and dont think of the profit	4	6
No Answer	8	11
Total	70	100

BATANGAS - PUERTO GALERA ROUTE

TABLE B.72
PURPOSE OF TRAVEL

	MV QUEEN ACVII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
EMPLOYEE			2	2	4						2	2	2
BUSINESS		3	5	8	15	5	5	11		3	10	13	13
STUDENT		1	8	9	17	17	17	36			1	25	26
OTHERS		1	4	5	9	13	13	28		1	17	18	18
VACATION	3	12	6	21	40	7	7	15	3	12	13	28	28
NO ANSWER	1		5	8	15	5	5	11	1	2	10	13	13
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.73
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

REASONS	MV QUEEN ACVII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
1-4 times a month	1	2	2	5	9	5	5	11	1	2	7	10	10
15 times above a year						2	2	4			7	2	2
12 times a year		2	4	6	11	5	5	11		2	9	11	11
4-10 times a year		3	11	14	26	14	14	30		3	25	28	28
2-3 times a year		3	2	5	9	9	9	19		3	11	14	14
Once a year	1	3	1	5	9	4	4	9	1	3	5	9	9
No Answer	2	6	10	18	34	8	8	17	2	6	18	26	26
Total	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.74
SERVICES ADEQUATE FOR DEMAND

	MV QUEEN ACVII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	1	28	32	60	37	37	79	3	1	65	69	69
NO		13	1	14	26	3	3	6		13	4	17	17
NO ANSWER	1	5	1	7	13	7	7	15	1	5	8	14	14
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.75
RELIABLE AND ON TIME

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	15	26	44	83	40	40	85	3	15	66	84	84
NO		1	2	3	6	1	1	2		1	3	4	4
NO ANSWER	1	3	2	6	11	6	6	13	1	3	8	12	12
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.76
GOOD SPACE RESERVATION

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	16	24	43	81	28	28	60	3	16	52	71	71
NO		2	5	7	13	11	11	23		2	16	18	18
NO ANSWER	1	1	1	3	6	8	8	17	1	1	9	11	11
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.77
GOOD BAGGAGE ACCOMMODATION/SECURITY

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	11	22	35	66	28	28	60	2	11	50	63	63
NO		6	5	11	21	10	10	21		6	15	21	21
NO ANSWER	2	2	3	7	13	9	9	19	2	2	12	16	16
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.78
ADEQUATE CONCERN FOR SAFETY

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	12	24	38	72	36	36	77	2	12	60	74	74
NO		4	2	6	11	2	2	4		4	4	8	8
NO ANSWER	2	3	4	9	17	9	9	19	2	3	13	18	18
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.79
ORGANIZED BOARDING PROCEDURE

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	1	11	21	33	62	25	25	33	1	11	46	58	58
NO	1	5	6	12	23	11	11	23	1	5	17	23	23
NO ANSWER	2	3	3	8	15	11	11	23	2	3	14	19	19
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.80
ACCOMMODATION STANDARDS

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
FOOD/CANTEEN													
UNACCEPTABLE		1	1	2	4	2	2	4		1	3	4	4
POOR		5	2	7	13	8	8	17		5	10	15	15
FAIR	2	5	9	16	30	22	22	47	2	5	31	38	38
GOOD/EXCEL.		8	16	24	45	7	7	15		8	23	31	31
NO ANSWER	2		2	4	8	8	8	17	2		10	12	12
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
TUILETS/SANITARY FACILITIES													
UNACCEPTABLE			1	1	2	2	2	4			3	3	3
POOR		7	4	11	21	10	10	21		7	14	21	21
FAIR	2	4	8	14	26	20	20	43	2	4	28	34	34
GOOD/EXCEL.		8	16	24	45	8	8	17		8	24	32	32
NO ANSWER	2		1	3	6	7	7	15	2		8	10	10
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
BEDDINGS/BLANKETS													
UNACCEPTABLE		2		2	4	1	1	2		2	1	3	3
POOR		2	2	4	8	2	2	4		2	4	6	6
FAIR	2	5	16	23	43	14	14	30	2	5	30	37	37
GOOD/EXCEL.			2	2	4	4	4	9			6	6	6
NO ANSWER	2	10	10	22	42	26	26	55	2	10	36	48	48
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
LEISURE FACILITIES													
UNACCEPTABLE		1	1	2	4	2	2	4		1	3	4	4
POOR		4	4	8	15	1	1	2		4	5	9	9
FAIR	2	6	15	23	43	21	21	45	2	6	36	44	44
GOOD/EXCEL.			2	2	4	7	7	15			9	9	9
NO ANSWER	2	8	8	18	34	16	16	34	2	8	24	34	34
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.80
(Continued)
ACCOMMODATION STANDARDS

	MV QUEEN ACVH					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
VENTILATION													
UNACCEPTABLE		1	1	2	4					1	1	2	2
POOR		1	1	2	4	3	3	6		1	4	5	5
FAIR		10	18	28	53	28	28	60		10	46	56	56
GOOD/EXCEL	2	1	4	7	13	6	6	13	2	1	10	13	13
NO ANSWER	2	6	6	14	26	10	10	21	2	6	16	24	24
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
CREW'S COURTESY/ASSISTANCE													
UNACCEPTABLE		2	1	3	6					2	1	3	3
POOR		2	1	3	6					2	1	3	3
FAIR		6	6	12	23	27	27	57		6	33	39	39
GOOD/EXCEL	2	6	18	26	49	4	4	9	2	6	22	30	30
NO ANSWER	2	3	4	9	17	16	16	34	2	3	20	25	25
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
DRINKING FOUNTAINS ETC.													
UNACCEPTABLE		1	2	3	6	1	1	2		1	3	4	4
POOR		3	3	8	15	3	3	6		5	6	11	11
FAIR	1	2	7	10	19	24	24	51	1	2	31	34	34
GOOD/EXCEL	1	4	10	15	28	5	5	11	1	4	15	20	20
NO ANSWER	2	7	8	17	32	14	14	30	2	7	22	31	31
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100
SPACE TO MOVE AROUND													
UNACCEPTABLE		1		1	2	2	2	4		1	2	3	3
POOR		4	1	5	9	2	2	4		4	3	7	7
FAIR		8	9	17	32	22	22	47		8	31	39	39
GOOD/EXCEL	2	4	16	22	42	10	10	21		4	26	32	32
NO ANSWER	2	2	4	8	15	11	11	23	2	2	15	19	19
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.81
BAGGAGE CARRIED BY PASSENGERS

KIND OF BAGGAGE NO. OF BAGGAGE	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
BAGS													
1-2	4	13	18	21	42	32	21	53	4	13	50	67	75
3-4			1	1	50	5	10	50				6	43
BOXES													
1-2		4	9	13	26	4	11	28		4	13	17	19
3-4			1	1	50		3	15			1	1	7
5 Above						1	4	100			1	1	100
SACKS													
1-2		1		1	2	2	4	10		1	2	3	3
3-4						7	7	35			7	7	50
CANS													
1-2		1		1	2	1	4	10		1	1	2	2
TOTAL													
1-2 Baggage	4	19	27	50	94	39	40	58	4	19	66	89	81
3-4 Baggage			2	2	4	12	20	29			14	14	13
5 Above Baggage						1	4	6			1	1	1
NO ANSWER			1	1	2	5	5	7			6	6	5
TOTAL	4	19	30	53	100	57	69	100	4	19	87	110	100

TABLE B.82
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILIJAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
WEIGHT													
1-10 kilos	2	3	1	6	11	12	12	26	2	3	13	18	18
11-20 kilos	1	1		2	4	3	3	6	1	1	3	5	5
40-50 kilos	1	1	2	4	8	1	1	2	1	1	3	5	5
None/no baggage			1	1	2						1	1	1
No answer		14	26	40	75	31	31	66			14	57	71
Total	4	19	30	53	100	47	47	100	4	19	77	100	100
EXTRA CHARGES PAID													
None/no extra charge		4	4	8	15	2	2	4		4	6	10	10
No answer	4	15	26	45	85	45	45	96	4	15	71	90	90
Total	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.83
ADEQUATE BAGGAGE STORAGE

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	7	12	21	40	28	28	60	2	7	40	49	49
NO	2	5	4	11	21	15	15	32	2	5	19	26	26
NO ANSWER		7	14	21	40	4	4	9		7	18	25	25
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.84
IS BAGGAGE STORAGE SECURED

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	1	8	12	21	40	31	31	66	1	8	43	52	52
NO	3	4	5	12	23	10	10	21	3	4	15	22	22
NO ANSWER		7	13	20	38	6	6	13		7	19	26	26
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.85
CHANGE OF SERVICES OVER THE PAST TWO YEARS

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES		2	6	8	15	18	18	38		2	24	26	26
NO		7	12	19	36	21	21	45		7	33	40	40
NO ANSWER	4	10	12	26	49	8	8	17	4	10	20	34	34
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

TABLE B.86
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM

	MV QUEEN ACVIII					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES		1	6	7	13	18	18	38		1	24	25	25
NO	4	11	12	27	51	21	21	45	4	11	33	48	48
NO ANSWER		7	12	19	36	8	8	17		7	29	27	27
TOTAL	4	19	30	53	100	47	47	100	4	19	77	100	100

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TABLE B.87
PASSENGER SUGGESTIONS

SUGGESTIONS	MV QUEEN ACVIII					MV SAN MIGUEL DE ILLIAN			TOTAL				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE	THIRD CLASS	TOTAL	% SHARE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Change the whole ferry & renovate it	1	1		2	4	1	1	2	1	1	1	3	3
Put up suggestion boxes		1		1	2					1		1	1
Avoid overloading		1	1	2	4					1	1	2	2
Space for baggages		1	1	2	4					1	1	2	2
Just put emphasis of the word good services & not think of the good income		1		1	2					1		1	1
Maintain cleanliness of vessel/toilet			7	7	13	12	12	26			19	19	19
Provide drinking fountains		1	1	2	2	1	1	2			2	2	2
Training for the crews to be courteous			1	1	2						1	1	1
Maintain the fare			1	1	2						1	1	1
Add more vessels, faster boats, and airconditioned rooms	3		1	4	8	2	2	4	3		3	6	6
Improve services and facilities		1	2	3	6	8	8	17		1	10	11	11
Less congestion						1	1	2			1	1	1
Provide security measures						1	1	2			1	1	1
Add leisure facilities to enjoy the trip						1	1	2			1	1	1
Student fare should have discount						1	1	2			1	1	1
Captain and crew should have uniform						1	1	2			1	1	1
Don't charge penalty for late purchase ticket						3	3	6			3	3	3
Provide baggage compartment						1	1	2			1	1	1
If the fare will increase they have to render good services						1	1	2			1	1	1
Give proper attention about the irregularities not just in writing						1	1	2			1	1	1
So far so good						1	1	2			1	1	1
No Answer		13	15	28	53	11	11	23		13	26	39	39
Total	4	19	30	53	100	47	47	100	4	19	77	100	100

STA. CRUZ - DALAHICAN ROUTE

TABLE B.88
PURPOSE OF TRAVEL

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
EMPLOYEE	9	18
BUSINESS	16	31
STUDENT	23	45
HOLIDAY	1	2
NO ANSWER	2	4
TOTAL	51	100

TABLE B.89
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
Every 2-3 months	6	12
Once a month	8	16
Every 4-5 years	1	2
6-10 times a year	2	4
2-4 times a year	13	25
Once a year	17	33
No answer	4	8
Total	51	100

TABLE B.90
SERVICES ADEQUATE FOR DEMAND

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	26	51
NO	22	43
NO ANSWER	3	6
TOTAL	51	100

TABLE B.91
RELIABILITY OF SERVICE

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	34	67
NO	10	20
NO ANSWER	7	14
TOTAL	51	100

TABLE B.92
GOOD SPACE RESERVATION

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
NO	51	100
TOTAL	51	100

TABLE B.93
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	3	6
NO	48	94
TOTAL	51	100

TABLE B.94
ADEQUATE CONCERN FOR SAFETY

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	31	61
NO	18	35
NO ANSWER	2	4
TOTAL	51	100

TABLE B.95
ORGANIZED BOARDING PROCEDURE

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
NO	48	94
NO ANSWER	3	6
TOTAL	51	100

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**TABLE B.96
ACCOMMODATION STANDARDS**

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
POOR	21	41
FAIR	18	35
GOOD/EXCEL	2	4
NO ANSWER	10	20
TOTAL	51	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	4	8
POOR	17	33
FAIR	26	51
GOOD/EXCEL	3	6
NO ANSWER	1	2
TOTAL	51	100
BEDDINGS/BLANKETS		
UNACCEPTABLE	1	2
POOR	9	18
FAIR	1	2
NO ANSWER	40	78
TOTAL	51	100
LEISURE FACILITIES		
UNACCEPTABLE	1	2
POOR	17	33
GOOD/EXCEL	1	2
NO ANSWER	32	63
TOTAL	51	100
VENTILATION		
UNACCEPTABLE	6	12
POOR	3	6
FAIR	7	14
GOOD/EXCEL	34	67
NO ANSWER	1	2
TOTAL	51	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	3	6
POOR	8	16
FAIR	25	49
GOOD/EXCEL	13	25
NO ANSWER	2	4
TOTAL	51	100
DRINKING FOUNTAINS ETC.		
UNACCEPTABLE	3	6
POOR	23	45
FAIR	17	33
GOOD/EXCEL	1	2
NO ANSWER	7	14
TOTAL	51	100
SPACE TO MOVE AROUND		
UNACCEPTABLE	1	2
POOR	21	41
FAIR	24	47
GOOD/EXCEL	1	2
NO ANSWER	4	8
TOTAL	51	100

**TABLE B.97
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV JOHN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	39	75
3-4	5	100
BOXES		
1-2	10	19
SACKS		
1-2	3	6
TOTAL		
1-2 Baggage	52	91
3-4 Baggage	5	9
TOTAL.	57	100

**TABLE B.98
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV JOHN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1-5 kilos	15	29
6-10 kilos	19	37
11-15 kilos	5	10
16-20 kilos	7	14
21-25 kilos	3	6
No answer	2	4
Total	51	100
EXTRA CHARGES PAID		
No extra charges	33	65
No answer	18	35
Total	51	100

**TABLE B.99
ADEQUATE BAGGAGE STORAGE**

	MV JOHN (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	2	4
NO	46	90
NO ANSWER	3	6
TOTAL.	51	100

TABLE B.100
IS BAGGAGE STORAGE SECURED

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	47	92
NO	4	8
TOTAL	51	100

TABLE B.101
CHANGE OF SERVICES OVER THE PAST TWO YEARS

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	12	24
NO	33	65
NO ANSWER	6	12
TOTAL	51	100

TABLE B.102
CONGESTED TRAVEL DURING PEAK SEASON BEEN A SERIOUS PROBLEM

MV JOHN (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	26	51
NO	21	41
NO ANSWER	4	8
TOTAL	51	100

TABLE B.103
PASSENGER SUGGESTIONS

MV JOHN (3rd Class Only)		
SUGGESTIONS	NO. OF PASSENGERS	% SHARE
Engine must be overhauled to minimize breakdown at sea	2	4
Need to open additional franchise or destroy monopoly	5	10
Shorten travel time	2	4
Passengers with ticket should be seated	9	18
Provide waste basket, micron radio etc.	5	10
Additional comfort rooms and drinking fountains	8	16
More space and blankets	10	20
Maintain cleanliness of comfort rooms & other facilities	8	16
No Answer	2	4
Total	51	100

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BALANACAN - DALAHICAN ROUTE

TABLE B.104
PURPOSE OF TRAVEL

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
BUSINESS	16	21
VACATION	12	16
STUDENT	31	41
OTHERS	11	15
NO ANSWER	5	7
TOTAL	75	100

TABLE B.105
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
Every three months	1	1
3-1 times a month	3	4
1-2 times a month	7	9
Every 2-4 years	2	3
2-5 times a year	28	37
Once a year	29	39
No answer	5	7
Total	75	100

TABLE B.106
SERVICES ADEQUATE FOR DEMAND

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	55	73
NO	15	20
NO ANSWER	5	7
TOTAL	75	100

TABLE B.107
RELIABILITY OF SERVICE

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	69	92
NO	4	5
NO ANSWER	2	3
TOTAL	75	100

**TABLE B.108
GOOD SPACE RESERVATION**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	52	69
NO	15	20
NO ANSWER	8	11
TOTAL	75	100

**TABLE B.109
GOOD BAGGAGE ACCOMMODATION/SECURITY**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	18	24
NO	55	73
NO ANSWER	2	3
TOTAL	75	100

**TABLE B.110
ADEQUATE CONCERN FOR SAFETY**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	58	77
NO	13	17
NO ANSWER	4	5
TOTAL	75	100

**TABLE B.111
ORGANIZED BOARDING PROCEDURE**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	21	28
NO	46	61
NO ANSWER	8	11
TOTAL	75	100

TABLE B.112
ACCOMMODATION STANDARDS

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
UNACCEPTABLE	3	4
POOR	2	3
FAIR	34	45
GOOD/EXCEL	33	44
NO ANSWER	3	4
TOTAL	75	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	2	3
POOR	10	13
FAIR	30	40
GOOD/EXCEL	27	36
NO ANSWER	6	8
TOTAL	75	100
BEDDINGS/BLANKETS		
POOR	42	56
FAIR	7	9
NO ANSWER	26	35
TOTAL	75	100
LEISURE FACILITIES		
POOR	25	33
FAIR	5	7
GOOD/EXCEL	15	20
NO ANSWER	30	40
TOTAL	75	100
VENTILATION		
UNACCEPTABLE	2	3
POOR	10	13
FAIR	6	8
GOOD/EXCEL	50	67
NO ANSWER	7	9
TOTAL	75	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	2	3
POOR	12	16
FAIR	42	56
GOOD/EXCEL	11	15
NO ANSWER	8	11
TOTAL	75	100
DRINKING FOUNTAINS ETC.		
POOR	37	49
FAIR	25	33
GOOD/EXCEL	5	7
NO ANSWER	8	11
TOTAL	75	100
SPACE TO MOVE AROUND		
POOR	3	4
FAIR	26	35
GOOD/EXCEL	38	51
NO ANSWER	8	11
TOTAL	75	100

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**TABLE B.113
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV SEAGOLD (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	56	86
3-4	1	57
BOXES		
1-2	6	9
3-4	3	43
SACKS		
1-2	3	5
5 Above	2	100
TOTAL		
1-2 Baggage	65	87
3-4 Baggage	7	9
5 Above Baggage	2	3
NO ANSWER	1	1
TOTAL	75	100

**TABLE B.114
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV SEAGOLD (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1-10 kilos	48	64
11-20 kilos	10	13
21-30 kilos	4	5
31-40 kilos	1	1
41-50 kilos	2	3
70-1000 kilos	2	3
No answer	8	11
Total	75	100
EXTRA CHARGES PAID		
No extra charges	15	20
Depend to the size of baggage	1	1
Big baggage is equivalent to a passenger fare	1	1
No answer	58	77
TOTAL	75	100

**TABLE B.115
ADEQUATE BAGGAGE STORAGE**

	MV SEAGOLD (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	9	12
NO	48	64
NO ANSWER	18	24
TOTAL	75	100

**TABLE B.116
IS BAGGAGE STORAGE SECURED**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	2	3
NO	47	63
NO ANSWER	26	35
TOTAL	75	100

**TABLE B.117
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	41	55
NO	29	39
NO ANSWER	5	7
TOTAL	75	100

**TABLE B.118
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	52	69
NO	18	24
NO ANSWER	5	7
TOTAL	75	100

**TABLE B.119
PASSENGER SUGGESTIONS**

MV SEAGOLD (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
More organizer to take charge	5	7
More drinking fountains, ventilation or space	9	12
Additional passenger seats with ticket number	12	16
Lack of food or food is too expensive	3	4
Put baggage storage	1	1
Put bigger canteen	1	1
Additional vessel	5	7
Provide Television	1	1
Provide reservation system	1	1
We need assistance from the crew	4	5
Complete improvement	1	1
No answer	32	43
Total	75	100

TABACO - VIRAC ROUTE

TABLE B.120
PURPOSE OF TRAVEL

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
EMPLOYEE	7	7
BUSINESS	11	11
STUDENT	20	19
HOLIDAYS	9	9
OTHERS	10	10
NO ANSWER	47	45
TOTAL	104	100

TABLE B.121
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
Many times	2	2
1-3 times a month	7	7
12 times a year	1	1
7-8 times a year	2	2
3-6 times a year	9	9
1-2 times a year	12	12
Once a year	23	22
Rare	1	1
No Answer	47	45
TOTAL	104	100

TABLE B.122
SERVICES ADEQUATE FOR DEMAND

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	53	51
NO	41	39
NO ANSWER	10	10
TOTAL	104	100

TABLE B.123
RELIABILITY OF SERVICE

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	92	88
NO	5	5
NO ANSWER	7	7
TOTAL	104	100

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TABLE B.124
GOOD SPACE RESERVATION

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	19	18
NO	22	21
NO ANSWER	63	61
TOTAL	104	100

TABLE B.125
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	19	18
NO	39	38
NO ANSWER	46	44
TOTAL	104	100

TABLE B.126
ADEQUATE CONCERN FOR SAFETY

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	41	39
NO	27	26
NO ANSWER	36	35
TOTAL	104	100

TABLE B.127
ORGANIZED BOARDING PROCEDURE

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	16	15
NO	10	10
NO ANSWER	78	75
TOTAL	104	100

TABLE B.128
ACCOMMODATION STANDARDS

MV RUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
POOR	6	6
FAIR	84	81
GOOD/EXCEL.	5	5
NO ANSWER	9	9
TOTAL	104	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	2	2
POOR	80	77
FAIR	9	9
GOOD/EXCEL.	4	4
NO ANSWER	9	9
TOTAL	104	100
BEDDINGS/BLANKETS		
UNACCEPTABLE	2	2
POOR	13	13
FAIR	7	7
GOOD/EXCEL.	1	1
NO ANSWER	81	78
TOTAL	104	100
LEISURE FACILITIES		
POOR	13	13
FAIR	71	68
GOOD/EXCEL.	3	3
NO ANSWER	17	16
TOTAL	104	100
VENTILATION		
POOR	32	31
FAIR	38	37
GOOD/EXCEL.	21	20
NO ANSWER	13	13
TOTAL	104	100
CREW'S COURTESY/ASSISTANCE		
POOR	21	20
FAIR	46	44
GOOD/EXCEL.	29	28
NO ANSWER	8	8
TOTAL	104	100
DRINKING FOUNTAINS ETC.		
UNACCEPTABLE	1	1
POOR	84	81
FAIR	7	7
GOOD/EXCEL.	5	5
NO ANSWER	7	7
TOTAL	104	100
SPACE TO MOVE AROUND		
POOR	37	36
FAIR	49	47
GOOD/EXCEL.	7	7
NO ANSWER	11	11
TOTAL	104	100

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**TABLE B.129
BAGGAGE CARRIED BY PASSENGERS**

KIND OF BAGGAGE NO. OF BAGGAGE	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BOXES		
1 - 2	14	18
3 - 4	4	19
5 - Above	2	50
BAGS		
1 - 2	64	80
3 - 4	17	81
5 - Above	1	25
SACKS		
5 - Above	1	25
CANS		
1 - 2	2	3
TOTAL		
1 - 2 Baggage	80	76
3 - 4 Baggage	21	20
5 - Above Baggage	4	4
TOTAL	105	100

**TABLE B.130
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1-5 kls.	27	26
6-10 kls.	9	9
11-15 kls.	1	1
25-30 kls.	2	2
50-60 kls.	7	7
100 kls.	7	7
None	1	1
No Answer	50	48
Total	104	100
EXTRA CHARGES PAID		
None	14	13
No Answer	90	87
Total	104	100

**TABLE B.131
ADEQUATE BAGGAGE STORAGE**

	MV EUGENIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	1	1
NO	29	28
NO ANSWER	74	71
TOTAL	104	100

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**TABLE B.132
IS BAGGAGE STORAGE SECURED**

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	1	1
NO	9	9
NO ANSWER	94	90
TOTAL	104	100

**TABLE B.133
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	22	21
NO	62	60
NO ANSWER	20	19
TOTAL	104	100

**TABLE B.134
OTHER VESSEL TRIED FOR SAME ROUTE
COMPARISON OF ADEQUACY AND QUALITY OF SERVICES**

MV EUGENIA (3rd Class Only)		
NAME OF VESSEL	NO. OF PASSENGERS	% SHARE
MV Antipolo	1	1
MV Virac	25	24
MV Calixta	14	13
None	12	12
Only one ship	1	1
No answer	51	49
Total	104	100
Comparison of Adequacy/Quality of Services		
Services about the same		
Yes	3	3
Not the same	1	1
More comfortable	1	1
Good crew	1	1
Different in size/capacity	4	4
Sub-total	10	10
This company performs better		
Yes	23	22
Comfortable	1	1
Cheap/safe	5	5
Bigger with more space	7	7
MV Eugenia is better	9	9
Sub-total	45	43
Other company performs better		
Comfortable	1	1
Short travel time	1	1
MV Calixta	2	2
MV Virac/Antipolo is good	2	2
Sub-total	6	6
No. of Respondents	61	59
No Answer	43	41
Total	104	100

TABLE B.135
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	64	62
NO	20	19
NO ANSWER	20	19
TOTAL	104	100

TABLE B.136
PASSENGER SUGGESTIONS

MV EUGENIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
Maintain cleanliness	7	7
With air-conditioned	11	11
Provide seats to passenger	20	19
Proper sanitation	9	9
Provide baggage section	10	10
Improve crew courtesy	47	45
Total	104	100

ODIONGAN - BATANGAS ROUTE

TABLE B.137
PURPOSE OF TRAVEL

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
EMPLOYEE	4	1	8	13	13
BUSINESS	13		12	25	25
STUDENT			22	22	22
VACATION/HOLIDAY	5	3	3	11	11
OTHERS		1	4	5	5
NO ANSWER	4		21	25	25
TOTAL	26	5	70	101	100

TABLE B.138
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
2-4 times a month	12		13	25	25
Once a month	4	2	4	10	10
Once every three years	1			1	1
6-10 times a year			1	1	1
2-5 times a year	1	1	40	42	42
Once a year	4	2	6	12	12
No answer	4		6	10	10
TOTAL	26	5	70	101	100

TABLE B.139
SERVICES ADEQUATE FOR DEMAND

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	3	26	32	32
NO	22	2	44	68	67
NO ANSWER	1			1	1
TOTAL	26	5	70	101	100

TABLE B.140
RELIABILITY OF SERVICE

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	25	4	55	84	83
NO	1	1	14	16	16
NO ANSWER			1	1	1
TOTAL	26	5	70	101	100

TABLE B.141
GOOD SPACE RESERVATION

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	2	16	20	20
NO	24	3	53	80	79
NO ANSWER			1	1	1
TOTAL	26	5	70	101	100

TABLE B.142
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	2	2	16	20	20
NO	24	3	51	78	77
NO ANSWER			3	3	3
TOTAL	26	5	70	101	100

TABLE B.143
ADEQUATE CONCERN FOR SAFETY

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	5	4	29	38	38
NO	21	1	35	57	56
NO ANSWER			6	6	6
TOTAL	26	5	70	101	100

TABLE B.144
ORGANIZED BOARDING PROCEDURE

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	3	15	21	21
NO	23	2	51	76	75
NO ANSWER			4	4	4
TOTAL	26	5	70	101	100

**TABLE B.145
ACCOMMODATION STANDARDS**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
FOOD/CANTEEN					
UNACCEPTABLE	13		33	46	46
POOR	7		17	24	24
FAIR	4	5	18	27	27
GOOD/EXCEL.	1			1	1
NO ANSWER	1		2	3	3
TOTAL	26	5	70	101	100
TOILET/SANITARY FACILITIES					
UNACCEPTABLE	13		31	44	44
POOR	12	3	16	31	31
FAIR	1	2	19	22	22
GOOD/EXCEL.			1	1	1
NO ANSWER			3	3	3
TOTAL	26	5	70	101	100
BEDDINGS/BLANKETS					
UNACCEPTABLE	15	1	36	52	51
POOR	8	3	9	20	20
FAIR	1		1	2	2
NO ANSWER	2	1	24	27	27
TOTAL	26	5	70	101	100
LEISURE FACILITIES					
UNACCEPTABLE	13		33	46	46
POOR	6	2	13	21	21
FAIR	6	2	6	14	14
NO ANSWER	1	1	18	20	20
TOTAL	26	5	70	101	100
VENTILATION					
UNACCEPTABLE	13		33	46	46
POOR	6	2	11	19	19
FAIR	5	2	3	10	10
GOOD/EXCEL.	2		5	7	7
NO ANSWER		1	18	19	19
TOTAL	26	5	70	101	100
CREW'S COURTESY/ASSISTANCE					
UNACCEPTABLE	13		24	37	37
POOR	5		17	22	22
FAIR	5	3	14	22	22
GOOD/EXCEL.	3	1	4	8	8
NO ANSWER		1	11	12	12
TOTAL	26	5	70	101	100
DRINKING FOUNTAINS ETC.					
UNACCEPTABLE	15	1	31	47	47
POOR	8	3	15	26	26
FAIR	2		6	8	8
GOOD/EXCEL.			3	3	3
NO ANSWER	1	1	15	17	17
TOTAL	26	5	70	101	100
SPACE TO MOVE AROUND					
UNACCEPTABLE	14		30	44	44
POOR	7		14	21	21
FAIR	3	3	10	16	16
GOOD/EXCEL.	2	1	2	5	5
NO ANSWER		1	14	15	15
TOTAL	26	5	70	101	100

**TABLE B.146
BAGGAGE CARRIED BY PASSENGERS**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
KIND OF BAGGAGE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
BOXES					
1 - 2	15	2	51	68	65
3 - 4	7		7	14	88
BAGS					
1 - 2	8	3	21	32	31
3 - 4	1		1	2	13
5 - Above			1	1	100
SACKS					
1 - 2			3	3	3
CANS					
1 - 2			1	1	1
TOTAL					
1 - 2 Baggage	23	5	76	104	86
3 - 4 Baggage	8		8	16	13
5 - Above baggage			1	1	1
TOTAL	31	5	85	121	100

**TABLE B.147
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
WEIGHT					
1-10 kilos	15		16	31	31
11-20 kilos	1	1	3	5	5
21-30 kilos above	2	2	3	7	7
50 lbs.			1	1	1
No answer	8	2	47	57	56
TOTAL	26	5	70	101	100
EXTRA CHARGES PAID					
None	10	1	1	12	12
No answer	16	4	69	89	88
TOTAL	26	5	70	101	100

**TABLE B.148
ADEQUATE BAGGAGE STORAGE**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	5	2	15	22	22
NO	21	3	47	71	70
NO ANSWER			8	8	8
TOTAL	26	5	70	101	100

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**TABLE B.149
IS BAGGAGE STORAGE SECURED**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	2	7	12	12
NO	22	3	51	79	78
NO ANSWER	1		9	10	10
TOTAL	26	5	70	101	100

**TABLE B.150
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	1	18	22	22
NO	22	3	39	64	63
NO ANSWER	1	1	13	15	15
TOTAL	26	5	70	101	100

**TABLE B.151
CONGESTED TRAVEL DURING
PEAK SEASON BEEN A SERIOUS PROBLEM**

MV ST. KRISTOPHER (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	23	5	60	88	87
NO	2		5	7	7
NO ANSWER	1		5	6	6
TOTAL	26	5	70	101	100

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TABLE B.152
PASSENGER SUGGESTIONS

SUGGESTIONS	MV ST. KRISTOPHER (Only Vessel Surveyed)				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Discipline the crew	2		2	4	4
Avoid overloading	1		5	6	6
Improve facilities & services	1		1	2	2
Additional vessel operators	7			7	7
Increase travel frequency	1			1	1
Provide food, beddings/blankets, or drinking fountains	5		26	31	31
Provide ticket no. for bedding reservation		1		1	1
Good system in boarding		1	5	6	6
Passenger should be given adequate/good services			8	8	8
Monitor if they are following regulations, penalize violators			2	2	2
Maintain cleanliness of comfort room, vessel, and facilities	2	1	8	11	11
Adequate area for baggages			1	1	1
Additional space for accommodation			1	1	1
Put suggestion boxes			2	2	2
Proper issuance and duplication of ticket			5	5	5
Lower the passenger fare	1			1	1
Provide security guards/janitors		1	1	2	2
Immediate attention/response to our complaints		1	1	2	2
No answer	6		2	8	8
TOTAL	26	5	70	101	100

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MANILA - MASBATE ROUTE

TABLE B.153
PURPOSE OF TRAVEL

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
EMPLOYEE					
BUSINESS	1	2	1	4	5
STUDENT	2	1	4	7	10
HOLIDAY	1	2	1	4	5
OTHERS		3	4	7	10
VACATION	11	10	27	48	66
NO ANSWER	1	1	1	3	4
TOTAL	16	19	38	73	100

TABLE B.154
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
1-2 times a month		4		4	5
Every two years			1	1	1
3-5 times a year	4	2	3	9	12
1-2 times a year	11	10	24	45	62
Summertime		1	3	4	5
Very seldom			2	2	3
First timer			2	2	3
No Answer	1	2	3	6	8
TOTAL	16	19	38	73	100

TABLE B.155
SERVICES ADEQUATE FOR DEMAND

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	14	18	28	60	82
NO			3	3	4
NO ANSWER	2	1	7	10	14
TOTAL	16	19	38	73	100

TABLE B.156
RELIABILITY AND ON TIME

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	11	19	32	62	85
NO	3		6	9	12
NO ANSWER	2		2	2	3
TOTAL	16	19	38	73	100

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TABLE B.157
GOOD SPACE RESERVATION

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	12	14	27	53	73
NO	2	5	10	17	23
NO ANSWER	2		1	3	4
TOTAL	16	19	38	73	100

TABLE B.158
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	17	26	52	71
NO	4	2	9	15	21
NO ANSWER	3		3	6	8
TOTAL	16	19	38	73	100

TABLE B.159
ADEQUATE CONCERN FOR SAFETY

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	13	17	34	64	88
NO		2		2	3
NO ANSWER	3		4	7	10
TOTAL	16	19	38	73	100

TABLE B.160
ORGANIZED BOARDING PROCEDURE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	13	14	32	59	81
NO		3	3	6	8
NO ANSWER	3	2	3	8	11
TOTAL	16	19	38	73	100

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TABLE B.161
ACCOMMODATION STANDARDS

MV CERU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
FOOD/CANTEEN					
POOR	4	3	6	13	18
FAIR	11	10	27	48	66
GOOD/EXCEL.	1			1	1
NO ANSWER		6	5	11	15
TOTAL	16	19	38	73	100
TOILET/SANITARY FACILITIES					
POOR	5	3	19	27	37
FAIR	10	10	12	32	44
GOOD/EXCEL.	1			1	1
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100
BEDDINGS/BLANKETS					
POOR	4	2	9	15	21
FAIR	9	9	22	40	55
GOOD/EXCEL.	3	2		5	7
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100
LEISURE FACILITIES					
POOR	5	3	17	25	34
FAIR	9	8	12	29	40
GOOD/EXCEL.	2	2		4	5
NO ANSWER		6	9	15	21
TOTAL	16	19	38	73	100
VENTILATION					
POOR	6	5	10	21	29
FAIR	10	8	21	39	53
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100
CREW'S COURTESY/ASSISTANCE					
POOR	2	1	9	15	21
FAIR	14	9	21	44	60
GOOD/EXCEL.			1	1	1
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100
DRINKING FOUNTAINS ETC.					
POOR	4	5	11	20	27
FAIR	12	8	20	40	55
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100
SPACE TO MOVE AROUND					
POOR	7	3	9	19	26
FAIR	9	10	22	41	56
NO ANSWER		6	7	13	18
TOTAL	16	19	38	73	100

TABLE B.162
BAGGAGE CARRIED BY PASSENGERS

MV CEBU PRINCESS (Only Vessel Surveyed)					
KIND OF BAGGAGE NO. OF BAGGAGE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
BAGS					
1-2	10	8	27	45	54
3-4	5	9	7	21	62
BOXES					
1-2	5	9	20	34	40
3-4	3	1	9	13	38
BACKS					
1-2		1	3	4	5
CANS					
1-2			1	1	1
TOTAL					
1-2 Baggage	15	18	51	84	69
3-4 Baggage	8	10	16	34	28
NO ANSWER		2	1	3	2
TOTAL	23	30	68	121	100

TABLE B.163
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
WEIGHT					
1-15 kilos	8	4	4	16	22
20-30 kilos	4		2	6	8
31-40 kilos			3	3	4
80 kilos			3	3	4
No answer	4	15	26	45	62
Total	16	19	38	73	100
EXTRA CHARGES PAID					
Porter Charge					
P20.00-P50.00	5	4	1	10	14
P60.00-P100.00	4	4	9	17	23
P150.00 Above	2			2	3
None	5	6	20	31	42
No answer		5	8	13	18
Total	16	19	38	73	100

TABLE B.164
ADEQUATE BAGGAGE STORAGE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	11	25	45	62
NO	6	3	7	16	22
NO ANSWER	1	5	6	12	16
TOTAL	16	19	38	73	100

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TABLE B.165
IS BAGGAGE STORAGE SECURED

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	10	11	17	38	52
NO	1	1	2	4	5
NO ANSWER	5	7	19	31	42
TOTAL	16	19	38	73	100

TABLE B.166
CHANGE OF SERVICES OVER THE PAST TWO YEARS

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	3	9	15	27	37
NO	13	9	16	38	52
NO ANSWER		1	7	8	11
TOTAL	16	19	38	73	100

TABLE B.167
OTHER COMPANY/VESSEL TRIED FOR SAME ROUTE
COMPARISON OF ADEQUACY AND QUALITY OF SERVICES

MV CEBU PRINCESS (Only Vessel Surveyed)					
COMPANY/VESSEL	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Aboitiz /MV Legaspi	4	1	1	6	8
Sulpicio Lines/MV Cebu Princess or Surigao Princess	4	7	4	15	21
Escano/Agustina			1	1	1
William Lines / MV Masbate or MV Tacloban City		1	3	4	5
Gothong/Sacred Heart		2	2	4	5
First timer/same vessel	4	2	3	9	12
No ans./inappropriate answer	4	6	26	36	49
Total	16	19	38	73	100
Comparison of Adequacy/Quality of Service					
Services about the same					
No	2	4	6	12	16
Yes		1	9	10	14
Not Sure	1		4	5	7
Sub-total	3	5	19	27	37
This Co. Performs Better					
Yes	4	4	2	10	14
No	2	1	4	7	10
Maybe	2	4	4	10	14
Sub-total	8	9	10	27	37
Other Co. Performs Better					
Yes	1		2	3	4
No	1	2		3	4
Maybe	2	1	3	6	8
Aboitiz			1	1	1
Sulpicio			1	1	1
Sub-total	4	3	7	14	19
No. of Respondents	15	17	36	68	93
No answer	1	2	2	5	7
Total	16	19	38	73	100

TABLE B.168

OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS

ORIGIN	DESTINATION	NO. OF TIMES	MV CEBU PRINCESS (Only Vessel Surveyed)				% SHARE
			FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	
Manila	Masbate	2 times a year	4			4	5
Legaspi/Manila	Ormoc	Once a year	4			4	5
Ormoc	Manila	2 times a year		2		2	3
Masbate	Manila	2 times a year		3	10	13	18
Ozamis	Manila	Once a year		1	1	2	3
Sorsogon	Masbate	Once a year			3	3	4
No Answer			8	13	24	45	62
Total			16	19	38	73	100

TABLE B.169

CONGESTED TRAVEL DURING PEAK SEASON
BEEN A SERIOUS PROBLEM

	MV CEBU PRINCESS (Only Vessel Surveyed)				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	6	5	20	31	42
NO	9	11	12	32	44
NO ANSWER	1	3	6	10	14
TOTAL	16	19	38	73	100

TABLE B.170

PASSENGER SUGGESTIONS

SUGGESTIONS	MV CEBU PRINCESS (Only Vessel Surveyed)				
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
The management should improve the sanitary facilities/cleanliness	1	1	10	12	16
Improve aircon and food services	4	1		5	7
Not too much higher in baggage fare	1	1		2	3
Maintain your good services	4		8	12	16
Lessen the strictness, for the passenger convenience	3		1	4	5
We are force to pay the porter		2		2	3
The management should arrange the number of boarding system		2	1	3	6
No answer	3	12	18	33	45
TOTAL	16	19	38	73	100

MASBATE - CEBU ROUTE

TABLE B.171
PURPOSE OF TRAVEL

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
EMPLOYEE		1	5	6	9
BUSINESS	4	2	7	13	20
STUDENT	1	1	5	7	11
HOLIDAY	3	7	19	29	44
OTHERS	2	2	5	9	14
NO ANSWER			2	2	3
TOTAL	10	13	43	66	100

TABLE B.172
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Every two months			2	2	3
1-5 times a month	4	4	19	27	41
12 times a year			1	1	2
1-3 times a year	6	8	21	35	53
No Answer		1		1	2
TOTAL	10	13	43	66	100

TABLE B.173
SERVICES ADEQUATE FOR DEMAND

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	7	5	29	41	62
NO	3	7	11	21	32
NO ANSWER		1	3	4	6
TOTAL	10	13	43	66	100

TABLE B.174
RELIABILITY OF SERVICE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	6	2	26	34	52
NO	4	10	14	28	42
NO ANSWER		1	3	4	6
TOTAL	10	13	43	66	100

TABLE B.175
GOOD SPACE RESERVATION

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	10	10	29	49	74
NO		3	11	14	21
NO ANSWER			3	3	5
TOTAL	10	13	43	66	100

TABLE B.176
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	8	3	9	20	30
NO	2	10	33	45	68
NO ANSWER			1	1	2
TOTAL	10	13	43	66	100

TABLE B.177
ADEQUATE CONCERN FOR SAFETY

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	10	11	34	55	83
NO		2	6	8	12
NO ANSWER			3	3	5
TOTAL	10	13	43	66	100

TABLE B.178
ORGANIZED BOARDING PROCEDURE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	6	2	20	28	42
NO	3	9	20	32	48
NO ANSWER	1	2	3	6	9
TOTAL	10	13	43	66	100

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TABLE B.179
ACCOMMODATION STANDARDS

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
FOOD/ CANTEEN					
UNACCEPTABLE		2	4	6	9
POOR	4	10	24	38	58
FAIR	5	1	12	18	27
GOOD/EXCEL.	1		2	3	5
NO ANSWER			1	1	2
TOTAL	10	13	43	66	100
TOILET FACILITIES					
POOR		3	12	15	23
FAIR	10	8	29	47	71
GOOD/EXCEL.		2		2	3
NO ANSWER			2	2	3
TOTAL	10	13	43	66	100
BEDDINGS/BLANKETS					
POOR	1	5	15	21	32
FAIR	9	7	25	41	62
GOOD/EXCEL.		1	2	3	5
NO ANSWER			1	1	2
TOTAL	10	13	43	66	100
LEISURE FACILITIES					
UNACCEPTABLE		5	2	7	11
POOR	7	7	19	33	50
FAIR	3	1	19	23	35
GOOD/EXCEL.			1	1	2
NO ANSWER			2	2	3
TOTAL	10	13	43	66	100
VENTILATION					
POOR		4	3	7	11
FAIR	9	8	19	36	55
GOOD/EXCEL.		1	3	4	6
NO ANSWER	1		18	19	29
TOTAL	10	13	43	66	100
CREW'S COURTESY/ASSISTANCE					
POOR	6	6	8	20	30
FAIR	4	7	33	44	67
NO ANSWER			2	2	3
TOTAL	10	13	43	66	100
DRINKING FOUNTAINS ETC.					
POOR		6	23	29	44
FAIR	10	7	17	34	52
NO ANSWER			3	3	5
TOTAL	10	13	43	66	100
SPACE TO MOVE AROUND					
POOR	3	8	28	39	59
FAIR	7	5	13	25	38
GOOD/EXCEL.					
NO ANSWER			2	2	3
TOTAL	10	13	43	66	100

TABLE B.180
BAGGAGE CARRIED BY PASSENGERS

MV CEBU PRINCESS (Only Vessel Surveyed)					
KIND OF BAGGAGE NO. OF BAGGAGE	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
BOXES					
1 - 2	4		2	6	10
3 - 4		1	3	4	27
5 - Above	1		1	2	20
BAGS					
1 - 2	8	9	34	51	86
3 - 4	1	2	4	7	47
5 - Above	2	2	1	5	50
SACKS					
1 - 2	1		1	2	3
3 - 4	2	1	1	4	27
5 - Above			3	3	30
TOTAL					
1 - 2 Baggage	13	9	37	59	70
3 - 4 Baggage	3	4	8	15	18
5 - Above baggage	3	2	5	10	12
TOTAL	19	15	50	84	100

TABLE B.181
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
WEIGHT					
1-10 kilos	4	6	16	26	39
11-20 kilos	2	1	6	9	14
20-30 kilos			5	5	8
30-40 kilos			2	2	3
40-50 kilos above	3	4	9	16	24
No Answer	1	2	5	8	12
TOTAL	10	13	43	66	100
EXTRA CHARGES PAID					
None/nothing	4	2	11	17	26
PPA, Macai, Macacava, Laborer	4	3	7	14	21
Porter Charge	2		3	5	8
10-50 kilos = P5-15			7	7	11
150-700 kilos = P30- 75			3	3	5
No Answer		8	12	20	30
TOTAL	10	13	43	66	100

TABLE B.182
ADEQUATE BAGGAGE STORAGE

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	5	14	28	42
NO	1	7	22	30	45
NO ANSWER		1	7	8	12
TOTAL	10	13	43	66	100

**TABLE B.183
IS BAGGAGE STORAGE SECURED**

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	7	5	11	23	35
NO	2	6	29	37	56
NO ANSWER	1	2	3	6	9
TOTAL	10	13	43	66	100

**TABLE B.184
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	6	7	29	42	64
NO	4	5	14	23	35
NO ANSWER		1		1	2
TOTAL	10	13	43	66	100

**TABLE B.185
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS**

MV CEBU PRINCESS (Only Vessel Surveyed)							
ORIGIN	DESTINATION	NO. OF TIMES	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Mandaon	Masbate	Once a year	1	-	-	1	2
Masbate	Aroroy	1-2 times a year	1	-	-	1	2
		Monthly	-	1	-	1	2
	Cebu	1-5 times a month	3	1	-	4	6
		1-2 times a year	4	2	6	12	18
		Many times a year	-	-	1	1	2
	Mindanao	3 - 5 times a month	-	-	1	1	2
		Always	-	-	1	1	2
	Mandaue	Monthly	-	-	2	2	3
	Iligan City	1-2 times a year	-	1	-	1	2
	Calbayog	3-4 times a year	-	-	2	2	3
Negros	Cebu City	3-4 times a year	1	-	-	1	2
Sorsogon	Cebu	1-5 times a month	-	1	-	1	2
Durias	Masbate	2 times a month	-	1	-	1	2
Cawayan	Masbate	3 times a week	-	1	-	1	2
Bantique	Masbate	3 times a week	-	1	-	1	2
Polot Baleno	Masbate	Weekly	-	1	-	1	2
		Always	-	-	2	2	3
San Fernando	Bulan	Monthly	-	1	-	1	2
San Jacinto	Masbate	Once a month	-	-	1	1	2
Butuan	Masbate	3-4 times a month	-	-	1	1	2
Cebu	Negros Oriental	3 times a year	-	-	1	1	2
	Bohol	1-2 times a year	-	-	1	1	2
Iligan	Cebu	Once a year	-	-	1	1	2
Cataingan	Cebu	Weekly	-	-	1	1	2
Donsol Sorsogon	Pulanque, Albay	Once a year	-	-	1	1	2
Ormoc	Cebu	Once a year	-	-	1	1	2
Bulan	Cebu	12 times a year	-	-	1	1	2
No answer			-	2	19	21	32
Total			10	13	43	66	100

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TABLE B.186
**CONGESTED TRAVEL DURING PEAK SEASON
 BEEN A SERIOUS PROBLEM**

MV CEBU PRINCESS (Only Vessel Surveyed)					
	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
YES	9	8	19	36	55
NO	1	2	4	7	11
NO ANSWER		3	20	23	35
TOTAL	10	13	43	66	100

TABLE B.187
PASSENGER SUGGESTIONS

MV CEBU PRINCESS (Only Vessel Surveyed)					
SUGGESTIONS	FIRST CLASS	SECOND CLASS	THIRD CLASS	TOTAL	% SHARE
Maintain/improve the cleanliness of the vessel	7	3	9	19	29
Provide security guard for passenger's safety	1	-	3	4	6
Provision for protective sheets for the security of cargo's & baggages	1	1	-	2	3
Follow instruction of the shipping board	-	1	-	1	2
Improve the food services	-	2	13	15	23
Provide baggage compartment/storage	-	1	7	8	12
Stop illegal gambling inside the vessel	-	1	2	3	5
Decrease the fees of PPA, Arrastre outside & inside the port	-	1	-	1	2
Improve the vessel	-	1	4	5	8
Lower the passenger fares	-	-	1	1	2
Increase the number of beddings	-	-	1	1	2
Maintain good services	1	1	-	2	3
No answer		1	3	4	6
TOTAL	10	13	43	66	100

MASBATE - BULAN ROUTE

TABLE B.188
PURPOSE OF TRAVEL

	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BUSINESS	2	9
STUDENT	2	9
VACATION	10	45
OTHER	4	18
NO ANSWER	4	18
TOTAL	22	100

TABLE B.189
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
1 - 10 times a year	12	100
TOTAL	12	100

TABLE B.190
SERVICES ADEQUATE FOR DEMAND

	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	19	86
NO	3	14
TOTAL	22	100

TABLE B.191
RELIABILITY OF SERVICE

	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	8	36
NO	14	64
TOTAL	22	100

TABLE B.192
GOOD SPACE RESERVATION

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	12	55
NO	10	45
TOTAL	22	100

TABLE B.193
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	12	55
NO	10	45
TOTAL	22	100

TABLE B.194
ADEQUATE CONCERN FOR SAFETY

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	19	86
NO	3	14
TOTAL	22	100

TABLE B.195
ORGANIZED BOARDING PROCEDURE

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	5	23
NO	16	73
NO ANSWER	1	5
TOTAL	22	100

TABLE B.196
ACCOMMODATION STANDARDS

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
POOR	2	9
FAIR	15	68
NO ANSWER	5	23
TOTAL	22	100
TOILET/SANITARY FACILITIES		
FAIR	5	23
GOOD/EXCEL.	17	77
TOTAL	22	100
BEDDINGS/BLANKETS		
POOR	15	68
FAIR	5	23
GOOD/EXCEL.	1	5
NO ANSWER	1	5
TOTAL	22	100
LEISURE FACILITIES		
POOR	4	18
FAIR	11	50
GOOD/EXCEL.	7	32
TOTAL	22	100
VENTILATION		
GOOD/EXCEL.	22	100
TOTAL	22	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	2	9
POOR	9	41
FAIR	11	50
TOTAL	22	100
DRINKING FOUNTAINS ETC.		
FAIR	21	95
GOOD/EXCEL.	1	5
TOTAL	22	100
SPACE TO MOVE AROUND		
POOR	7	32
FAIR	8	36
GOOD/EXCEL.	7	32
TOTAL	22	100

TABLE B.197
BAGGAGE CARRIED BY PASSENGERS

MV MASBATE (3rd Class Only)		
KIND OF BAGGAGE NO. OF BAGGAGE	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	19	70
3-4	1	25
BOXES		
1-2	8	30
3-4	3	75
5 - above	1	100
TOTAL		
1-2 Baggage	27	84
3-4 Baggage	4	13
5 Above baggage	1	3
TOTAL	32	100

TABLE B.198
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1- 10 kilos	4	18
11 - 20 kilos	2	9
21 - 30 kilos	1	5
31 - 40 kilos	1	5
40 kilos above	5	23
No answer	9	41
TOTAL	22	100
EXTRA CHARGES PAID		
Labor	2	9
Bill of Macaewa , Macai and Porter	6	27
No extra charges	1	5
No answer	13	59
TOTAL	22	100

TABLE B.199
ADEQUATE BAGGAGE STORAGE

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	8	36
NO	11	50
NO ANSWER	3	14
TOTAL	22	100

**TABLE B.200
IS BAGGAGE STORAGE SECURED**

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	9	41
NO	13	59
TOTAL	22	100

**TABLE B.201
CHANGE OF SERVICES OVER THE PAST TWO YEARS**

MV MASBATE (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	8	36
NO	13	59
NO ANSWER	1	5
TOTAL	22	100

**TABLE B.202
OTHER COMPANY/VESSEL TRIED FOR SAME ROUTE
& COMPARISON OF ADEQUACY AND QUALITY OF SERVICES**

MV MASBATE (3rd Class Only)		
COMPANY/VESSEL	NO. OF PASSENGERS	% SHARE
Sulpicio Lines, Inc.	2	9
San Pablo Company	4	18
Motor Banca	4	18
No answer	12	55
Total	22	100
COMPARISON OF ADEQUACY/QUALITY OF SERVICE		
Services about the same		
Yes	2	9
Sometimes	1	5
No	3	14
Sub - total	6	27
This Company performs better		
Sometimes	2	9
Yes	5	23
No	1	5
Sub - total	8	36
Other Company performs better		
Sometimes	3	14
Yes	1	5
No	2	9
Sub - total	6	27
No. of Respondent	20	91
No. answer	2	9
Total	22	100

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**TABLE B.203
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS**

ORIGIN	DESTINATION	NO. OF TIMES	MV MASBATE (3rd Class Only)	
			NO. OF PASSENGERS	% SHARE
Masbate	Cebu	Many times	1	5
	Bohol	2 times a year	1	5
	Bulan		2	9
		3 times a month	1	5
		2 times a year	1	5
		12 times a year	1	5
		4-7 times a year	1	5
		Many times	1	5
	Cataingan	2 times a year	1	5
	Butuan	Once a year	1	5
Jintotolo	Once a year	1	5	
Capiz	2 times a year	1	5	
Samar	Milagros	3 times a year	1	5
	Tabaco, Albay	Once a year	1	5
Cataingan	Cebu City		1	5
San Jacinto	Legaspi City		1	5
Tabaco	Donsol Sorsogon		1	5
Iligan	Tabaco, Albay		1	5
No answer			3	14
Total			22	100

**TABLE B.204
CONGESTED TRAVEL DURING PEAK SEASON
BEEN A SERIOUS PROBLEM**

	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	17	77
NO	3	14
NO ANSWER	2	9
TOTAL	22	100

**TABLE B.205
PASSENGER SUGGESTIONS**

SUGGESTIONS	MV MASBATE (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
Take care of passenger's safety	3	14
Improve the vessel	1	5
Follow rules and regulations	2	9
Maintain cleanliness, discipline, & organized boarding procedure	4	18
Provide clinic, nurses, & security guard	2	9
Maintain good facilities	6	27
Fix time in boarding	1	5
Put safety gadgets	1	5
No Answer	2	9
Total	22	100

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MASBATE - PILAR ROUTE

TABLE B.206
PURPOSE OF TRAVEL

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BUSINESS	6	46
STUDENT	5	38
HOLIDAY	1	8
NO ANSWER	1	8
TOTAL	13	100

TABLE B.207
FREQUENCY OF TAKING THIS PARTICULAR VOYAGE

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
1- 2 times a month	4	31
1- 2 times a year	2	15
No answer	7	54
Total	13	100

TABLE B.208
SERVICES ADEQUATE FOR DEMAND

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	11	85
NO	2	15
TOTAL	13	100

TABLE B.209
RELIABILITY OF SERVICE

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	12	92
NO	1	8
TOTAL	13	100

TABLE B.210
GOOD SPACE RESERVATION

MV GLORIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
NO	2	15
NO ANSWER	11	85
TOTAL	13	100

TABLE B.211
GOOD BAGGAGE ACCOMMODATION/SECURITY

MV GLORIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
NO	12	92
NO ANSWER	1	8
TOTAL	13	100

TABLE B.212
ADEQUATE CONCERN FOR SAFETY

MV GLORIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	13	100
TOTAL	13	100

TABLE B.213
ORGANIZED BOARDING PROCEDURE

MV GLORIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
YES	8	62
NO	4	31
NO ANSWER	1	8
TOTAL	13	100

TABLE B.214
ACCOMMODATION STANDARDS

MV GLORIA (3rd Class Only)		
	NO. OF PASSENGERS	% SHARE
FOOD/CANTEEN		
UNACCEPTABLE	12	92
POOR	1	8
TOTAL	13	100
TOILET/SANITARY FACILITIES		
UNACCEPTABLE	4	31
POOR	9	69
TOTAL	13	100
BEDDINGS/BLANKETS		
UNACCEPTABLE	4	31
POOR	8	62
NO ANSWER	1	8
TOTAL	13	100
LEISURE FACILITIES		
UNACCEPTABLE	4	31
POOR	6	46
NO ANSWER	3	23
TOTAL	13	100
VENTILATION		
POOR	1	8
FAIR	11	85
NO ANSWER	1	8
TOTAL	13	100
CREW'S COURTESY/ASSISTANCE		
UNACCEPTABLE	12	92
NO ANSWER	1	8
TOTAL	13	100
DRINKING FOUNTAINS ETC.		
UNACCEPTABLE	2	15
POOR	10	77
NO ANSWER	1	8
TOTAL	13	100
SPACE TO MOVE AROUND		
UNACCEPTABLE	1	8
POOR	11	85
FAIR	1	8
TOTAL	13	100

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TABLE B.215
BAGGAGE CARRIED BY PASSENGERS

KIND OF BAGGAGE NO. OF BAGGAGE	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
BAGS		
1-2	9	60
3-4	5	56
BOXES		
1-2	5	33
3-4	1	11
SACKS		
1-2	1	7
3-4	2	22
5 ABOVE	3	100
CANS		
3-4	1	7
TOTAL		
1-2 Baggage	15	63
3-4 Baggage	9	38
5 Above Baggage	3	13
TOTAL	24	100

TABLE B.216
WEIGHT OF BAGGAGE AND EXTRA CHARGES PAID

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
WEIGHT		
1- 10 kilos	7	54
11 - 20 kilos	3	23
500 kilos above	3	23
TOTAL	13	13
EXTRA CHARGES PAID		
No extra charges	4	31
Laborer /Porter	9	69
TOTAL	13	13

TABLE B.217
ADEQUATE BAGGAGE STORAGE

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	7	54
NO	3	23
NO ANSWER	3	23
TOTAL	13	100

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TABLE B.218
IS BAGGAGE STORAGE SECURED

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	1	8
NO	10	77
NO ANSWER	2	15
TOTAL	13	100

TABLE B.219
CHANGE OF SERVICES OVER THE PAST 2 YEARS

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	6	46
NO	6	46
NO ANSWER	1	8
TOTAL	13	100

TABLE B.220
OTHER SEA VOYAGES TAKEN DURING THE PAST TWO YEARS

ORIGIN	DESTINATION	NO. OF TIMES	MV GLORIA (3rd Class Only)	
			NO. OF PASSENGERS	% SHARE
Pilar	Masbate	1-3 times a year	5	38
	Daraga, Albay	1-2 times a month	1	8
	Legaspi City	Once a month	1	8
Ticao	Masbate	3 times a year	1	8
Burias	Masbate	2 times a year	1	8
		Once a month	1	8
Daleno	Masbate	3 times a year	1	8
No Answer			2	15
TOTAL			19	100

TABLE B.221
**CONGESTED TRAVEL DURING PEAK SEASON
BEEN A SERIOUS PROBLEM**

	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
YES	11	85
NO ANSWER	2	15
TOTAL	13	100

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TABLE B.222
PASSENGER SUGGESTIONS

SUGGESTIONS	MV GLORIA (3rd Class Only)	
	NO. OF PASSENGERS	% SHARE
Maintain cleanliness	2	15
Provide life jackets	4	31
Improve toilet facilities	2	15
Put baggage compartment/storage	2	15
Improve crew courtesy	1	8
No Answer	2	15
Total	13	100