

# **Customer Satisfaction Tracking Annual Report 2004**

## **British Columbia Ferry Services Inc.**

### **Presented to:**

British Columbia Ferry Services Inc.  
Victoria, British Columbia



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# Executive Overview

## Background

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British Columbia Ferry Services Inc., known as BC Ferries, conducts a Customer Satisfaction Tracking (CST) study each year. The CST study is designed to monitor customer satisfaction with various aspects of service on BC Ferries in order to determine areas that passengers believe are performing well and areas that require improvement. This study is part of a regular program of ongoing research conducted each year by BC Ferries.

The following report provides annual customer satisfaction results for the following:

- Overall ferry service
- Service prior to arriving at the terminal
- Service at the ferry terminal
- Service onboard the ferry
- Service pertaining to loading/unloading
- Overall safety of operations, and
- Value for money of fares paid

For each of the more than sixty attributes, the score for last year (2003) is shown on the graphs next to the score for this year (2004), to allow for easy comparison.

In addition to graphs showing the overall scores, this report includes detailed tables by route - in the Appendix - showing satisfaction scores for each of the 69 service attributes for 2004. The Appendix also includes detailed satisfaction scores for each of the 28 terminal-related attributes, shown separately for each of the main terminals.

## Methodology

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

A total of 13,748 screener interviews were conducted and 4,403 longer questionnaires were completed and returned to the research firm. Interviews were

distributed across different routes, both larger and smaller routes, during three different times of the year; peak season, shoulder season and low season. A sample of eight designated routes was included in the survey, representing 80% of the annual passenger traffic carried by BC Ferries. A more detailed explanation of the research design is included in the *Research Methodology* section, in the Appendix of this report.

## Findings

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Customers were asked to rate their satisfaction with 69 different aspects of the services they received from BC Ferries on a scale from 1 to 5 where 1 means Very Dissatisfied and 5 means Very Satisfied.

### ***Satisfaction with BC Ferries Overall***

A total of 88% of passengers in 2004 reported to be satisfied overall with their experience travelling on BC Ferries, higher than the satisfaction level in 2003 (82%). On the five-point satisfaction scale, an average score of 4.1 was achieved.

This overall improvement may be due to increasing satisfaction related to ferry scheduling, specifically with *on-time departures* and the *ability to get on the desired sailing*. Ratings have been increasing on these scheduling aspects and tend to drive overall passenger satisfaction.

### ***Satisfaction Before Arriving at Terminal***

- Passengers who used the Web site continue to be quite satisfied with the *usefulness* of the site, and *ease of using online reservations*, with no significant changes to report in the ratings.
- Passengers making phone contact with BC Ferries continue to be less complimentary of the *usefulness of BC Ferries phone service*, and specifically the *ease of using the automated system*, with no significant improvement in ratings since 2003.
- Highway signage receives a reasonable rating of 3.8 (similar to last year), with Duke Point and Swartz Bay terminal passengers continuing to be slightly more satisfied than others, and Horseshoe Bay and Langdale passengers being more critical.

### **Satisfaction at the Terminal**

- In 2004, passengers provided an overall satisfaction rating of 3.9 with their terminal experience before boarding, identical to last year. Only at Duke Point do we see an increase in the rating—from 3.8 in 2003 to 4.1 in 2004.
- Satisfaction levels continue to be high with all aspects of the ticket purchase process with no significant shifts from last year.
- Passengers using food and beverage services at the terminal continue to be critical of the *food/beverage offered* and the *value for money*. *Value for money*, in fact, has dropped slightly from 2003 (most likely due to the major terminal construction underway at Tsawwassen, resulting in a temporarily reduced food service offering).
- Satisfaction levels with other retail services at the terminal are similar to those recorded in 2003.
- Overall, foot passengers continue to be dissatisfied with many of their services. In fact satisfaction has declined with *ease of using passenger drop-off/pick-up area*, *availability of parking spaces* and *parking value for money*. Dissatisfaction with the parking facilities is highest at Tsawwassen.
- Satisfaction levels with other terminal services have been quite consistent throughout the year with no significant changes to report from 2003. Passengers continue to be most positive about the *professionalism of terminal staff*, *procedures for loading*, and *availability of washrooms* at the terminal. Satisfaction levels are slightly lower for *cleanliness of washrooms* and *announcements when you need to be informed*. The *clarity of the public address system* still receives the most criticism of these terminal services. Moderate satisfaction ratings are provided on two new attributes, *overall look and décor inside the terminal* and *outside appearance of the terminal* (3.6 and 3.8 respectively).

### **Satisfaction Onboard**

- Onboard satisfaction achieved a rating of 4.0 this year, same as in 2003.

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

- A total of 85% of passengers in 2004 were satisfied with their overall experience onboard, compared to 83% in 2003. Scores are similar on each route with the following exceptions:
  - Route 3: satisfaction levels have improved from 77% in 2003 to 86% this year.
  - Route 30: satisfaction levels have dropped slightly from 85% in 2003 to 78% this year.
- Satisfaction levels continue to be highest for *staff courtesy* and *variety/selection of merchandise* in the onboard gift shop/news stand, with no movement from the 2003 levels. The rating for *ease of moving around inside the shop* has increased slightly, but it continues to be lower than the other two gift shop measures, as does *value for money*.
- Food services continue to perform well for *staff courtesy*, *cleanliness of seating area* and *availability of seating*. Satisfaction levels are lower, however, for *comfort of seating*, *length of time in line*, *food/beverages offered* and *value for money*. These tend to be areas of concern on most vessels, with no significant movement in ratings over the past year.
- Passengers continue to be relatively satisfied with the *availability of washrooms* but are more critical of the *cleanliness* on most vessels, with no changes to report year over year.
- Travellers continue to be relatively satisfied with the *comfort* and *cleanliness* of indoor lounge seating with no change in ratings from 2003.
- In terms of other onboard facilities and services, satisfaction levels continue to be reasonably high, with passengers most complimentary of the *professionalism of onboard staff* and least satisfied with the *video arcade*, *play area for children* and *ease of access for people with disabilities*, with no movement in ratings over last year.

### **Satisfaction with Sailing Schedules**

Many aspects of the sailing schedule still are not fully meeting passengers' requirements. However, perceptions have improved over the year with respect to *on-time departures* (72% now satisfied in contrast to 61% a year ago) and *ability to get on their desired sailing* (72% satisfied in contrast to 64% a year ago). Passengers continue to be critical of *sailing frequency*, *last ferry late enough* and the *ability to make connections*.

Differences by route follow a pattern similar to last year, specifically:

- *On-time departures*: Route 1 and minor routes except 5/9 have the highest ratings, Routes 2 and 5/9 have the worst.
- *Ability to get onto desired sailing*: Route 19 passengers claim to have the most difficulty.
- *Sailing frequency*: Route 3 has the lowest rating.
- *Latest ferry late enough*: Routes 3 and 4 record the lowest ratings.

### **Satisfaction with Safety**

- Perceptions of the *safety of the ferry operations* continue to be quite strong on all routes, with no significant change from last year. The *safety of loading/unloading* follows virtually the same pattern.

### **Satisfaction with Overall Value**

- Satisfaction levels are low with perceived *value for money of fares*. Further analysis shows that travellers who were unable to get on the sailing they arrived for are most critical of *value for money*, perhaps understandably. Older passengers and tourists, on the other hand, are most positive about the value they receive.

## **Key Conclusions**

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Passengers on the whole are satisfied with their BC Ferries' experience.

The *professionalism of the staff* is a key contributor to overall satisfaction; this relates to staff in all areas of service, and in particular at the terminal. The customer's terminal experience, otherwise, is generally rated slightly lower than their experience onboard the ferry. *Safety of ferry operations* consistently rates high.

In summary, BC Ferries continues to perform well on the following:

- Staff in all areas - phone, ticket booth, retail, terminal, onboard, food services
- Safety of ferry operations and safety of loading/unloading
- Usefulness of the Web site
- Ease of using on-line reservations
- Efficiency of ticket purchase transaction
- Procedures for unloading
- Availability of tourist and travel info
- Availability of washrooms

However, the research identifies several opportunities to enhance the customer experience. The most significant gains in overall satisfaction will likely be achieved through the continued improvement of:

- On-time departures, and,
- Ability to get on the desired sailing

The research also suggests that improvements to the following services are required:

***Pre-terminal***

- Ease of using automated phone system

***Terminal***

- Cleanliness of washrooms
- Clarity of public address system
- Announcements when you need to be informed
- Food/beverages offered and value for money
- Variety selection and value for money of merchandise (gift shop/news stand/outdoor market area)
- Availability, comfort and cleanliness of seating in pre-boarding lounge for foot passengers
- Availability of parking spaces
- Parking value for money

***Onboard***

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



**Schedules**

- Latest ferry late enough
- Sailing frequency
- Ability to connect

**Overall**

- Value for money of fares

## Detailed Findings

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

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

<b>Ferry Routes Included in Customer Satisfaction Survey - 2004</b>	
<b>Route No.</b>	<b>Description of Route</b>
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay-Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

## Overall Satisfaction with BC Ferries

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A total of 88% of passengers in 2004 reported to be satisfied overall with their experience travelling on BC Ferries, higher than satisfaction levels measured in 2003 (82%). On a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied' an average score of 4.1 is achieved.

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

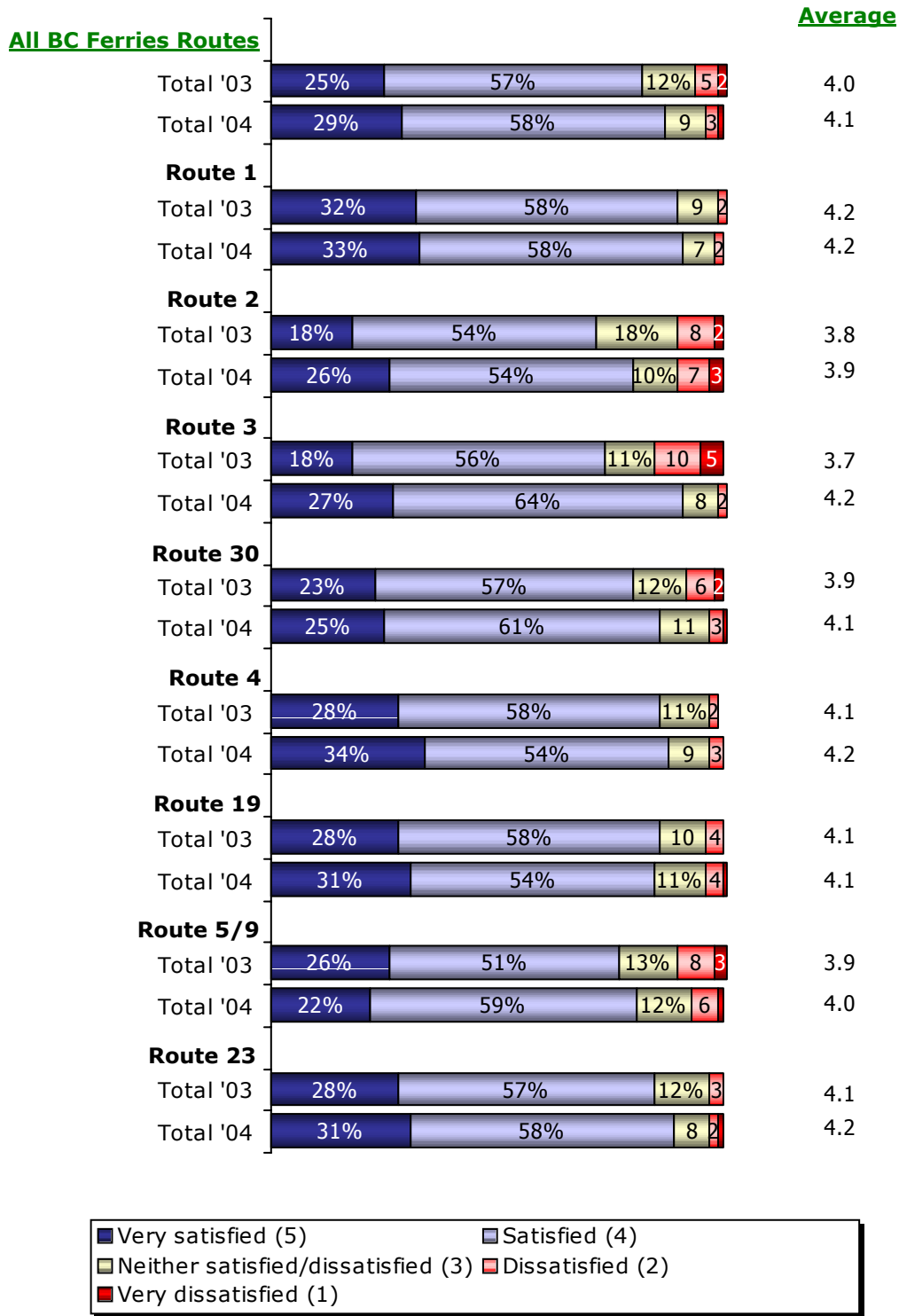
Overall satisfaction levels have strengthened on:

- Route 2 (80% satisfied compared to 72% in 2003),
- Route 3 (91% satisfied up from 72% in 2003),
- Route 30 (86% compared to 80% a year ago), and
- Route 4 (88% satisfied up slightly from 86% but the 'very' satisfied level has increased from 28% in 2003 to 34%).

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

This overall improvement may be due to increasing satisfaction with ferry scheduling, specifically with perceptions of on-time departures, and ability to get on their desired sailing. Ratings have been increasing on these aspects of scheduling, which are known to be key drivers of passenger satisfaction.

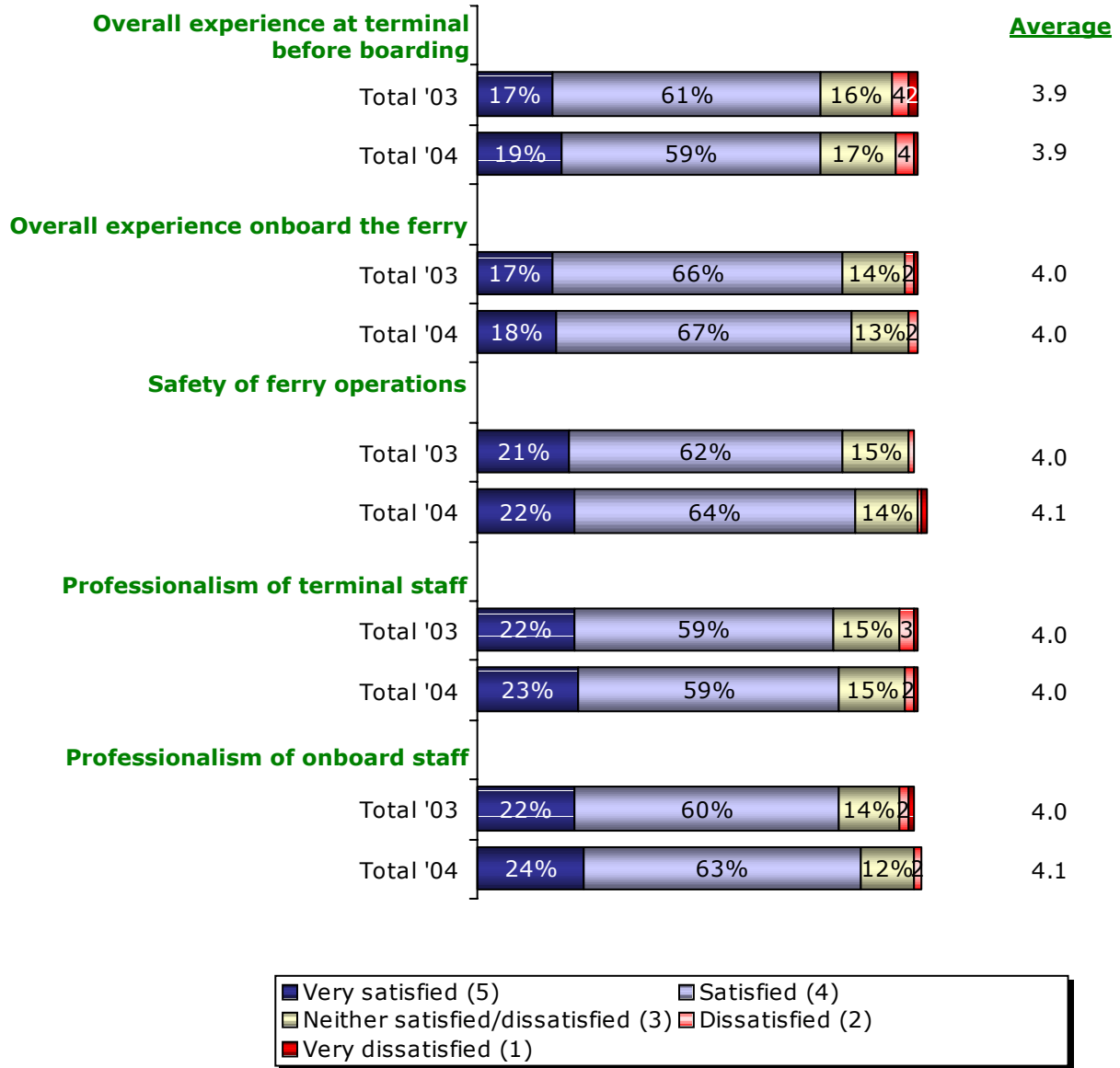
**Overall Satisfaction Level with Recent Experience Travelling with BC Ferries**



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

The following chart summarizes the results from overall measures of each main point of contact and with BC Ferries staff specifically. Overall, results are similar to those obtained in 2003. Further analysis of each measure is provided in subsequent sections.

**Summary of Main Satisfaction Scores**



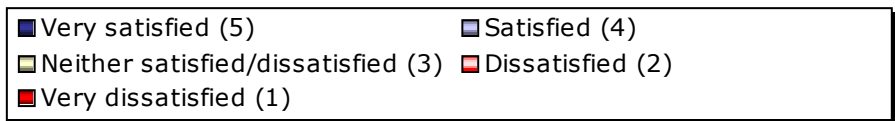
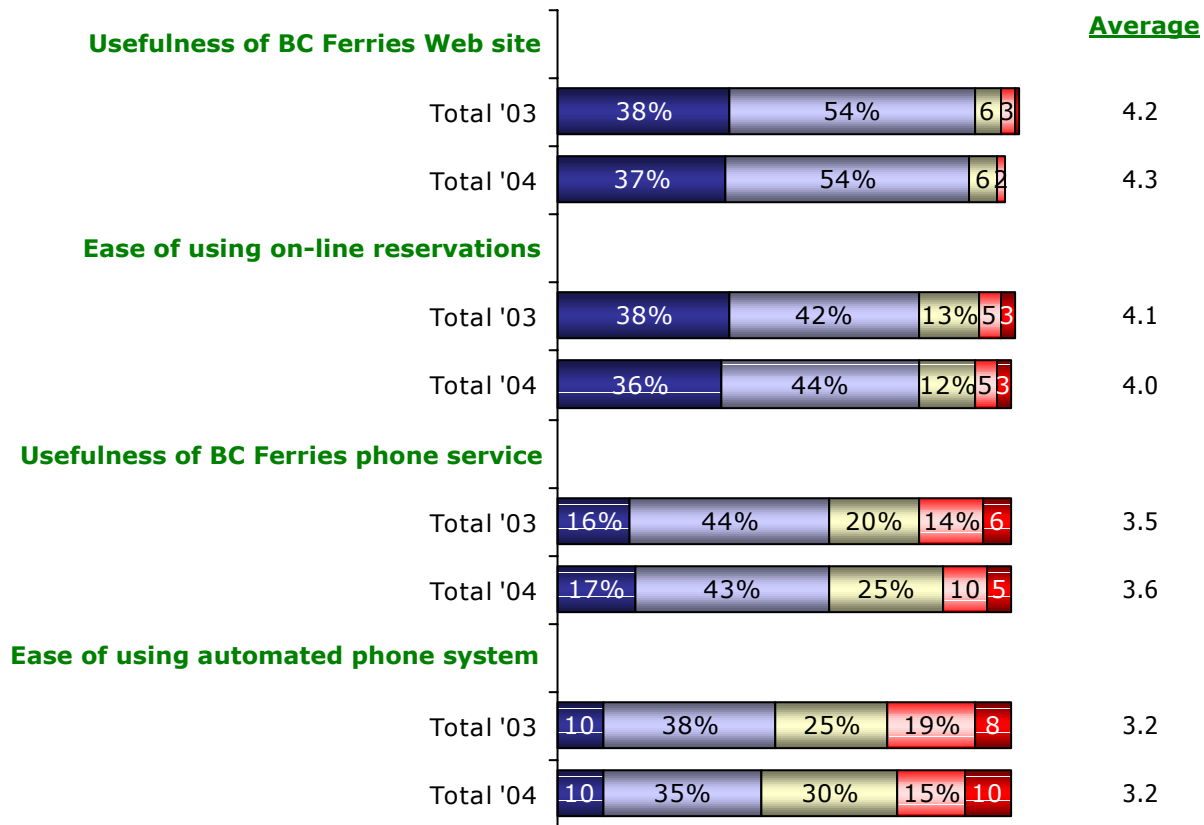
## Before Arriving at Terminal

### Web site and Phone Contact

Passengers who used the Web site continue to be quite satisfied with the *usefulness* of the site and *ease of using online reservations*, with no significant changes to report in the ratings.

Passengers making phone contact with BC Ferries continue to be less complimentary of the *usefulness of BC Ferries phone service* and specifically the *ease of using the automated system*, with no significant changes in ratings since 2003.

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

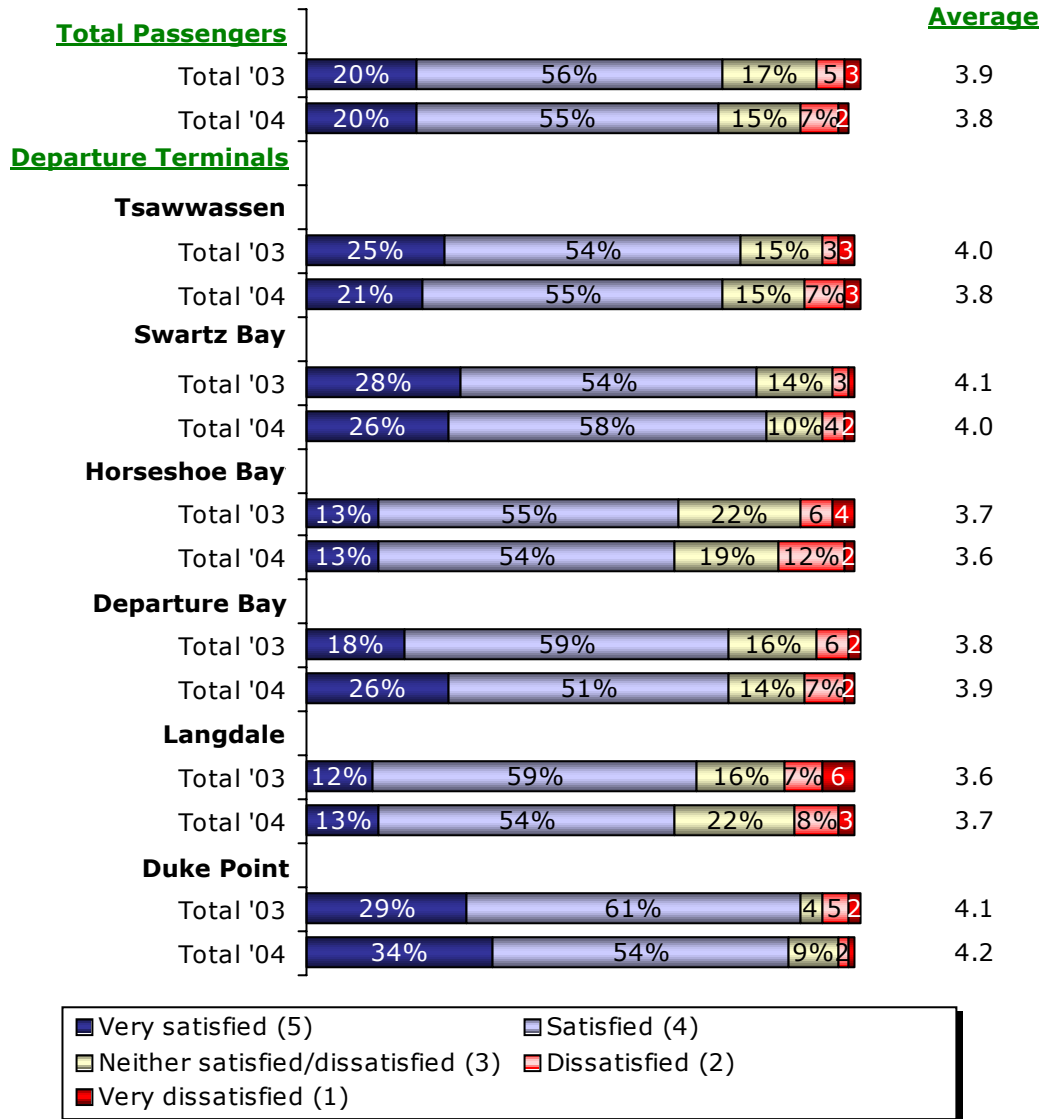


Q.2) Please rate how satisfied or dissatisfied you were with each of the following.  
 \* 53% usage Web site, 24% for on-line reservations  
 \*\* 32% usage phone service, 27% for automated system

**Highway Signage**

Highway signage receives a rating of 3.8 (similar to last year), with Duke Point and Swartz Bay terminal passengers continuing to be slightly more satisfied than others, and Horseshoe Bay and Langdale passengers being more critical.

**Satisfaction with Highway Signage\***



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

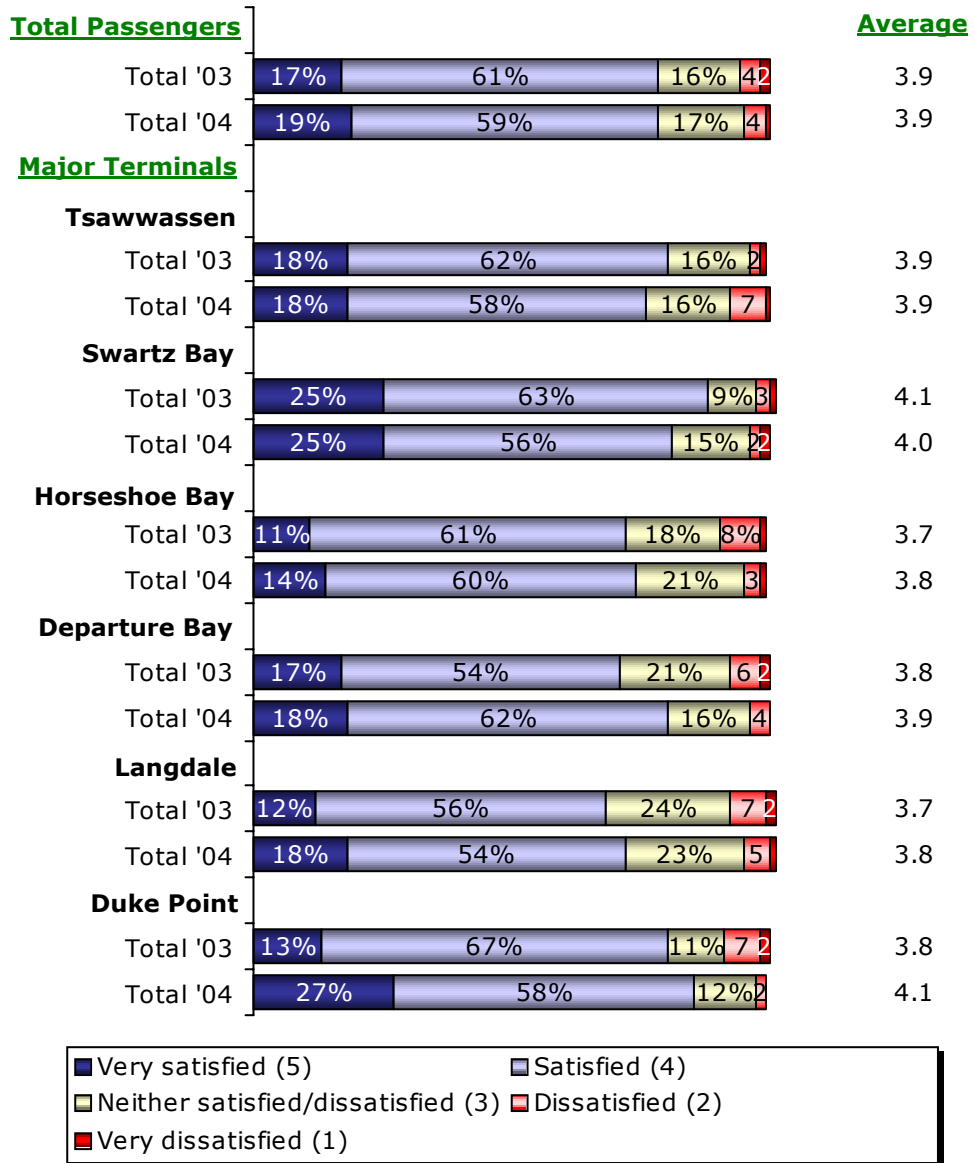
\* Usage: 73%

## At the Terminal

### Overall Experience at the Terminal

In 2004, passengers provided an overall satisfaction rating of 3.9 with their terminal experience before boarding, identical to last year. Only at Duke Point do we see an increase in the rating—from 3.8 in 2003 to 4.1 this year.

### Overall Satisfaction with Experience at the Terminal Before Boarding



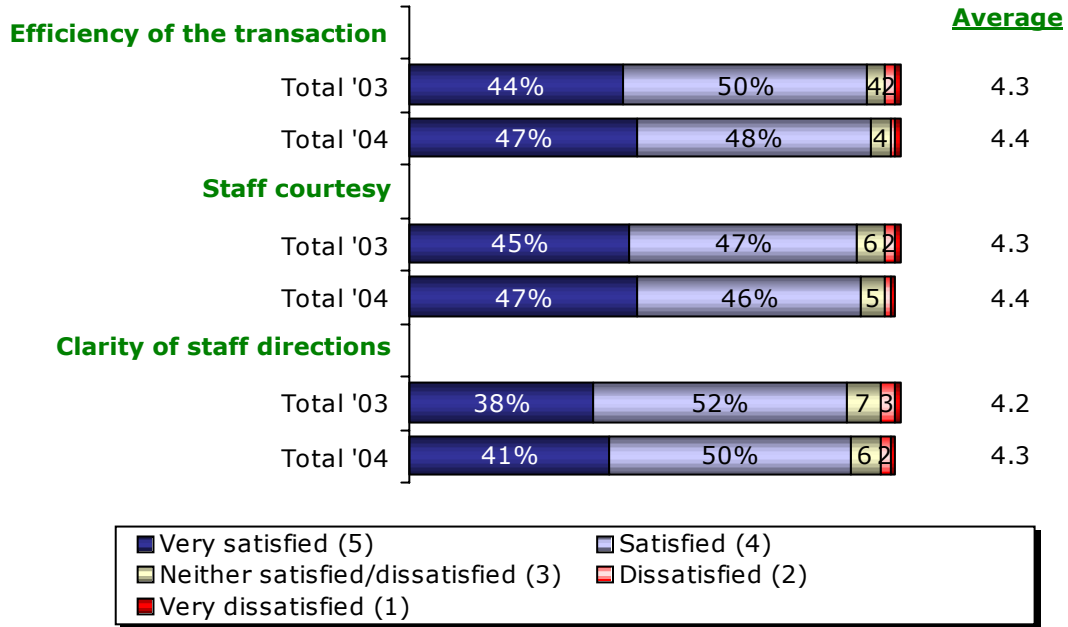
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.



**Ticket Purchase**

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

**Satisfaction with Aspects of Ticket Purchase**

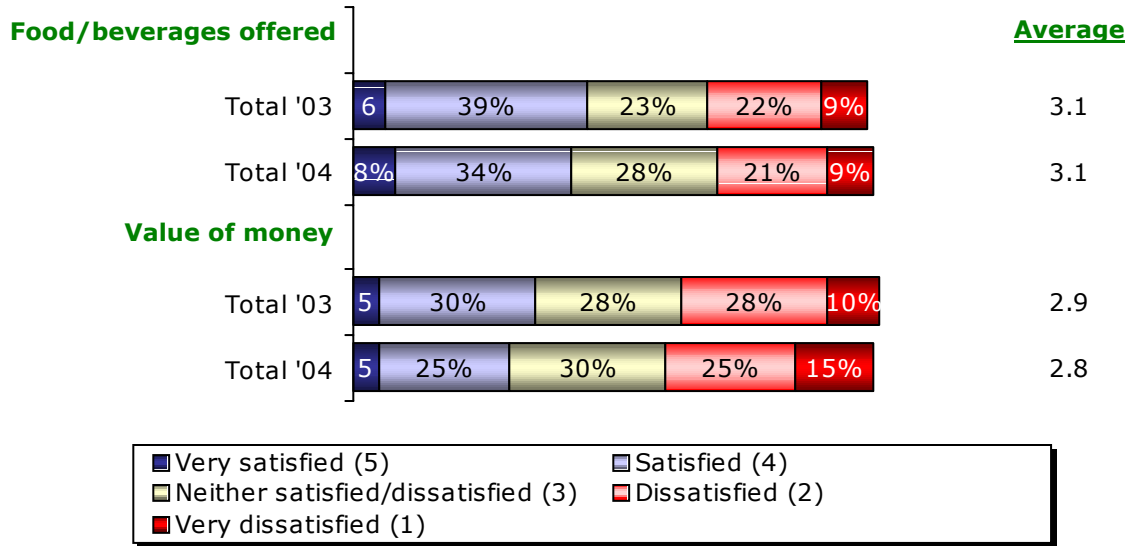


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

**Food/Beverage Services at Terminal**

Passengers using food and beverage services at the terminal continue to be critical of the *food/beverage offered* and *value for money*, with perception of *value* dropping very slightly from 2003.

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



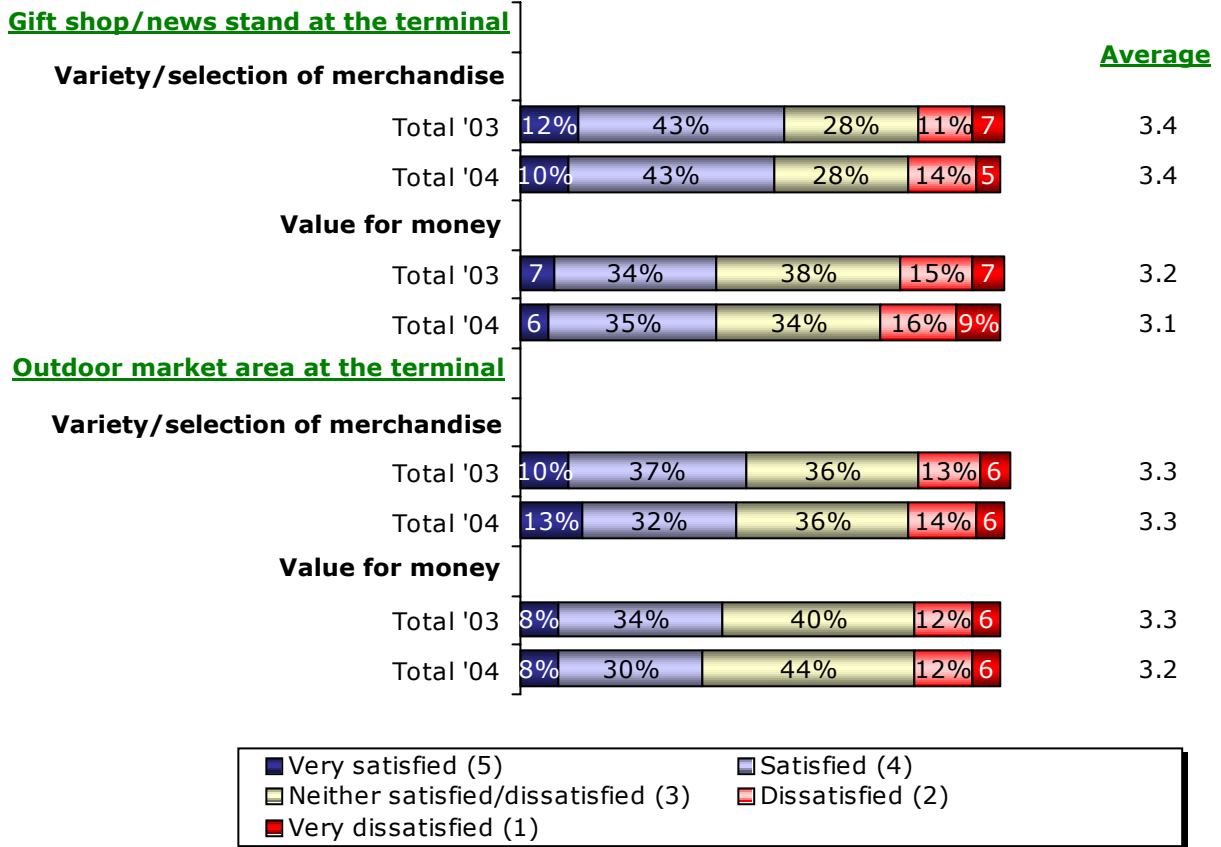
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

\* 43% usage overall; excluding routes 19 and 23.

**Retail Services at Terminal**

Satisfaction levels with retail services at the terminal are similar to those recorded last year.

**Satisfaction with Aspects of Retail Services at Terminal\***



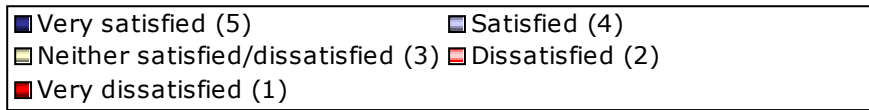
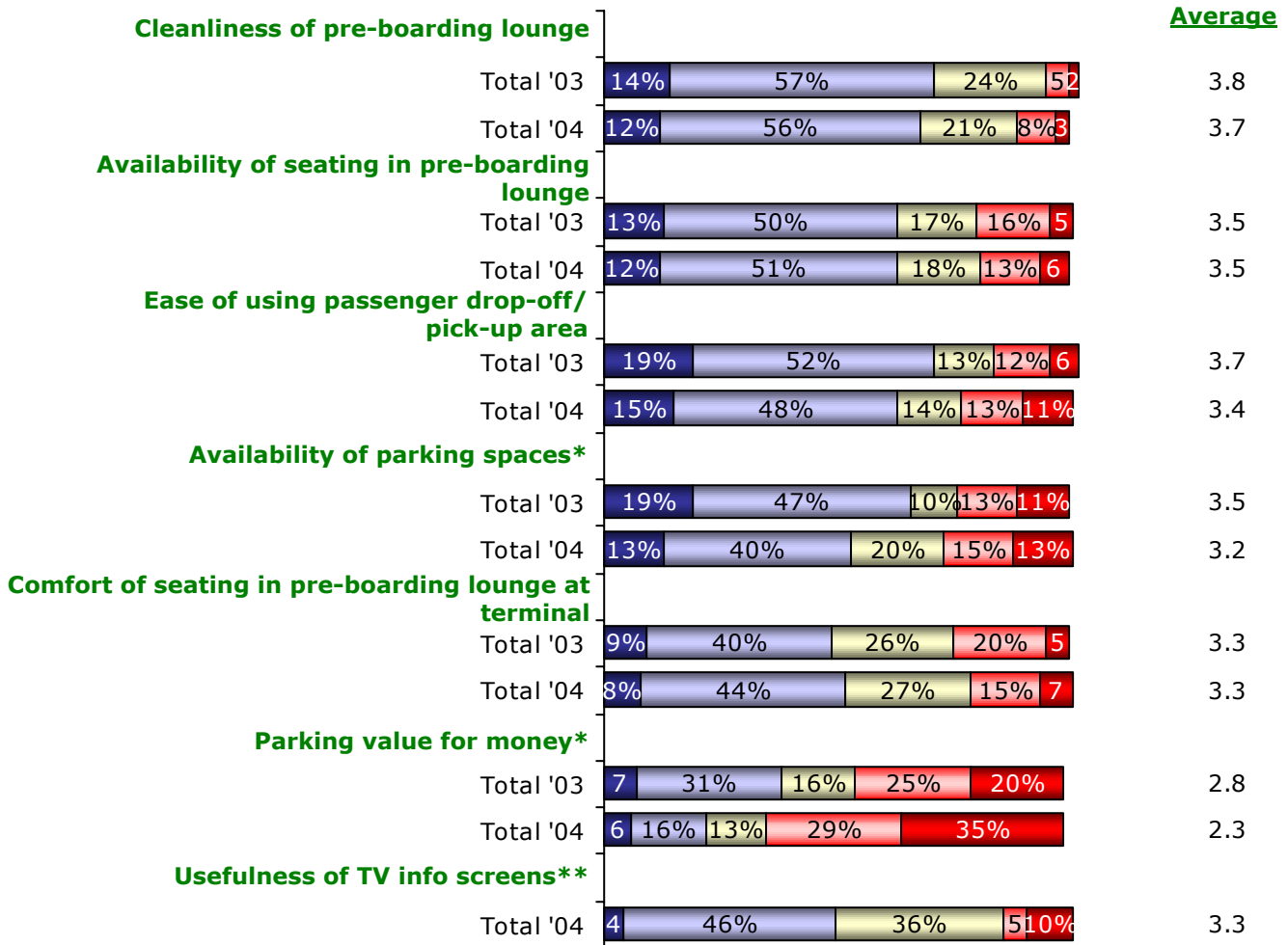
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

\* 29% usage gift shop, 26% usage outdoor market; excludes route 19, and route 23.

**Foot Passenger Services**

Overall, foot passengers continue to be dissatisfied with many of their services. In fact satisfaction has declined with *ease of using passenger drop-off/pick-up area*, *availability of parking spaces* and *parking value for money*. Dissatisfaction with the parking facilities is highest at Tsawwassen.

**Satisfaction with Foot Passenger Services\***



Q.3) Please rate how satisfied or dissatisfied you were with each of the following.  
31% are foot passengers (including bus).

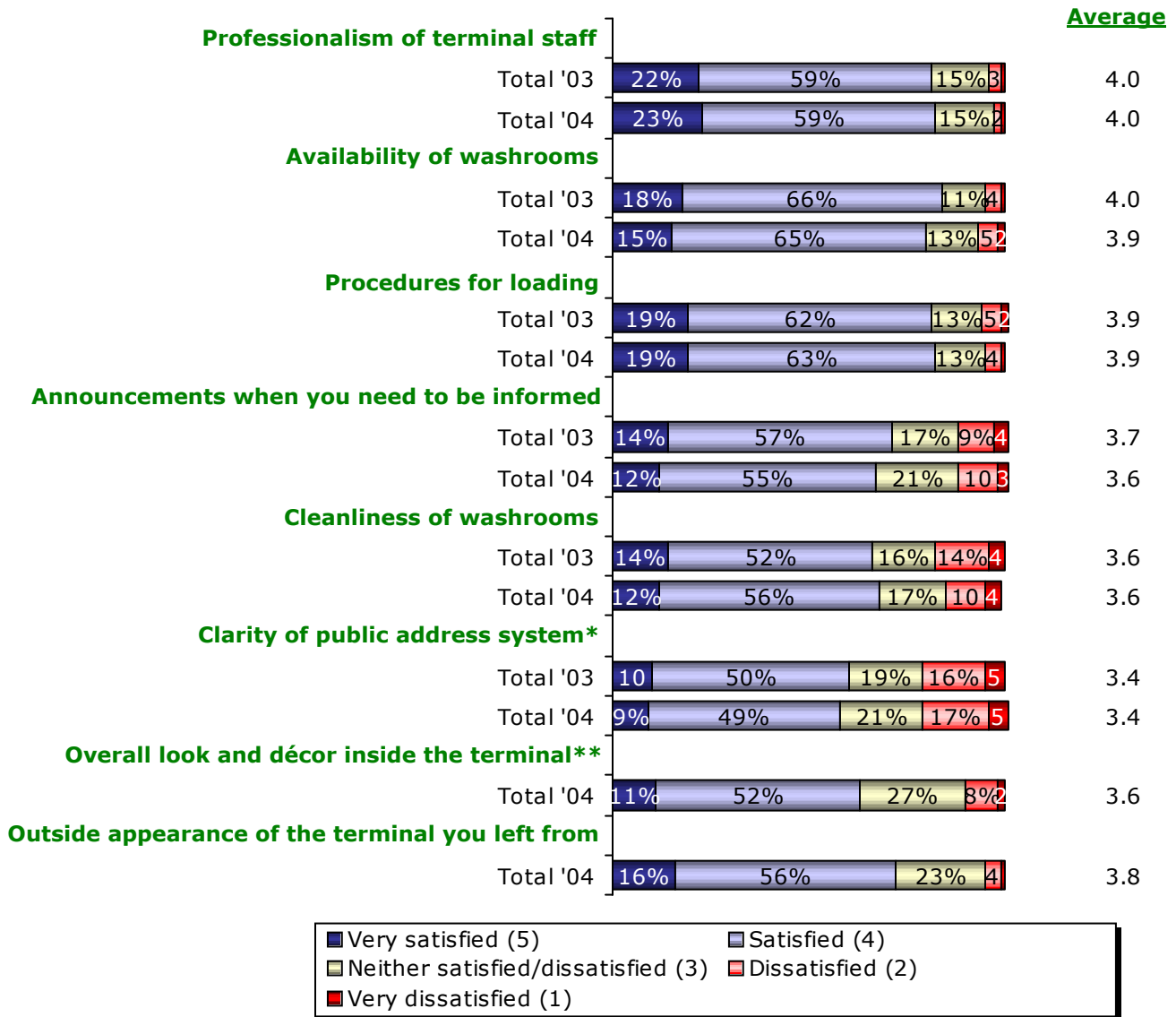
\* Excludes Route 23.

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

**Other Terminal Services**

Satisfaction levels with other terminal services have been quite consistent with no significant changes from 2003. Passengers continue to be most positive about the *professionalism of terminal staff, procedures for loading, and availability of washrooms* at the terminal. Satisfaction levels are slightly lower for *cleanliness of washrooms* and for *announcements when you need to be informed*. The *clarity of the public address system* still receives the most criticism of these terminal services. Moderate satisfaction ratings are provided on two new attributes, *overall look and décor inside the terminal* and *outside appearance of the terminal* (3.6 and 3.8 respectively).

**Satisfaction with Other Terminal Services**



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

\* Excluding Route 23.

\*\* Excludes Route 19 & 23.

## Onboard Experience

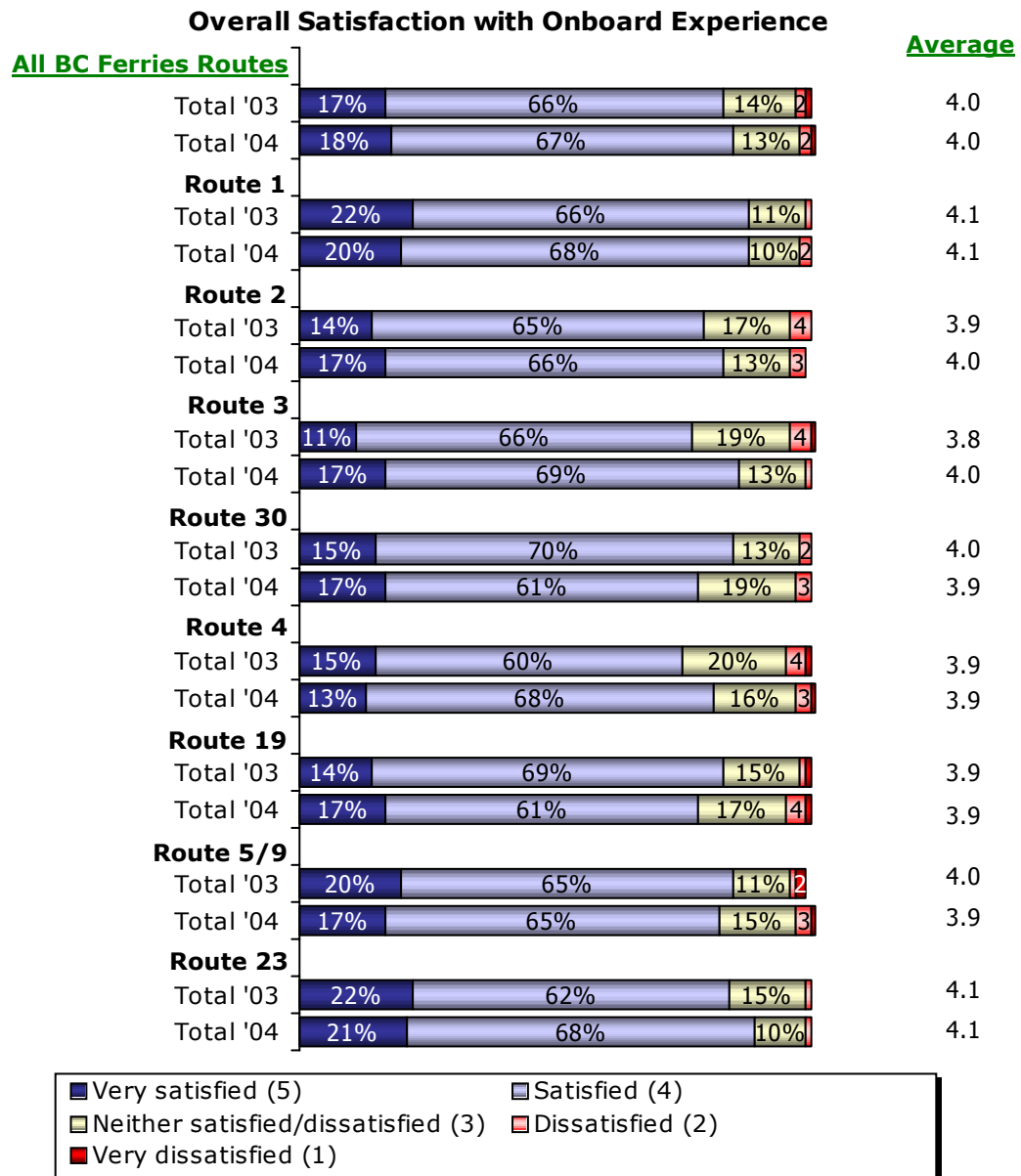
### Overall Onboard Experience

Onboard satisfaction achieved a rating of 4.0 this year, same as in 2003.

A total of 85% of passengers in 2004 were satisfied with their overall experience onboard, compared to 83% in 2003. Scores are similar on each route with the following exceptions:

- Route 3: satisfaction levels have improved from 77% in 2003 to 86% this year.
- Route 30: satisfaction levels have dropped slightly from 85% in 2003 to 78% this year.

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

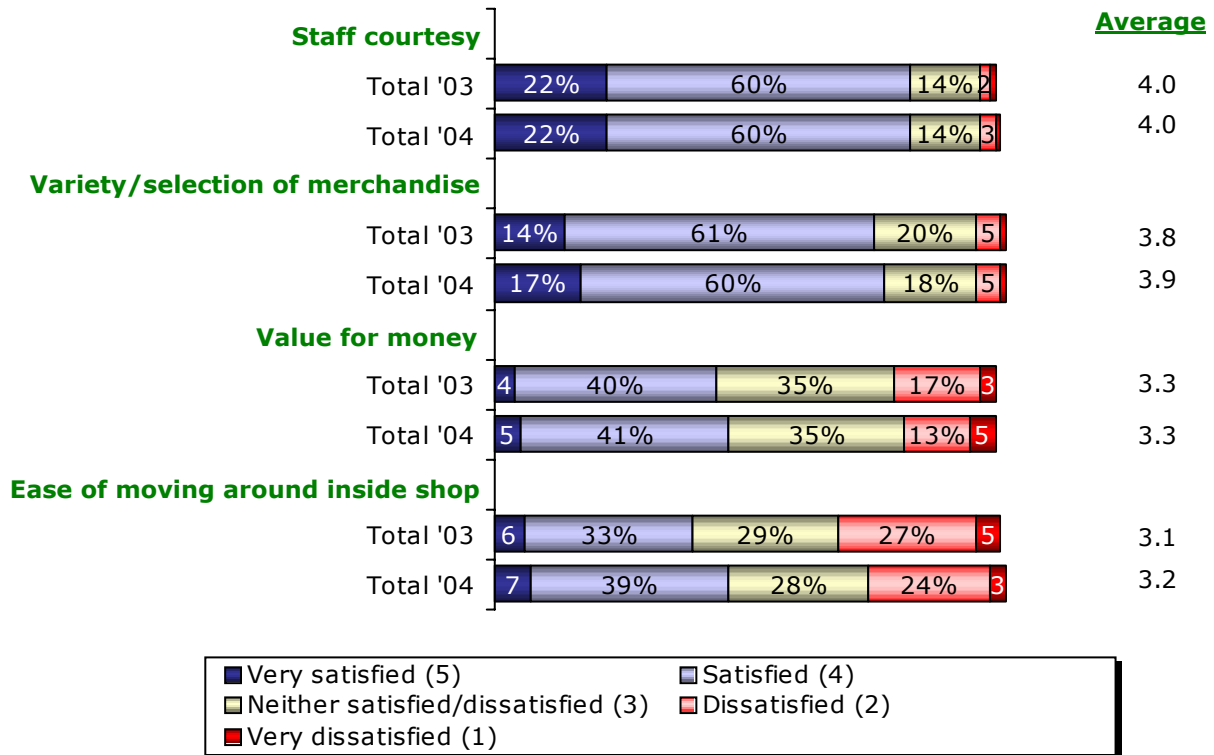


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Onboard Gift Shop/News Stand**

Satisfaction levels continue to be highest for *staff courtesy* and *variety/selection of merchandise* in the gift shop/news stand, with no changes from 2003. The rating for *ease of moving around inside the shop* has increased slightly, but it continues to be lower than the other two gift shop aspects, as does *value for money*.

**Satisfaction with Aspects of Gift Shop/News Stand Onboard\***



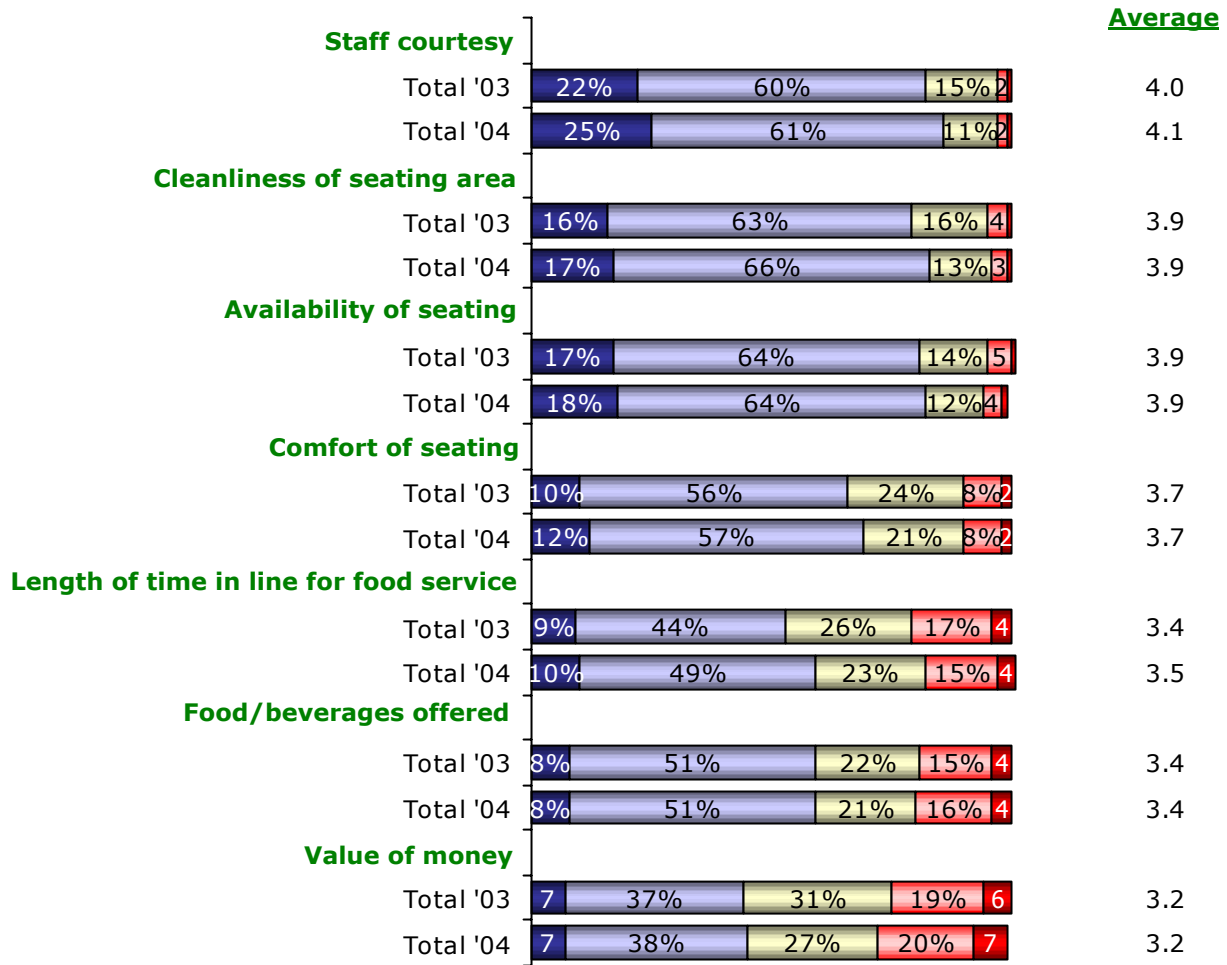
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

\* Excludes Routes 4, 19 and 23. Otherwise usage is 57%.

**Onboard Food Services**

Food services continue to perform well for *staff courtesy, cleanliness of seating area and availability of seating*. Satisfaction levels are lower, however, for *comfort of seating, length of time in line, food/beverages offered and value for money*. These tend to be areas of concern on most vessels, with no significant movement in ratings over last year.

**Satisfaction with Aspects of Food and Beverage Services Onboard\***



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

\* Excludes Routes 4, 19 and 23. Usage 77%

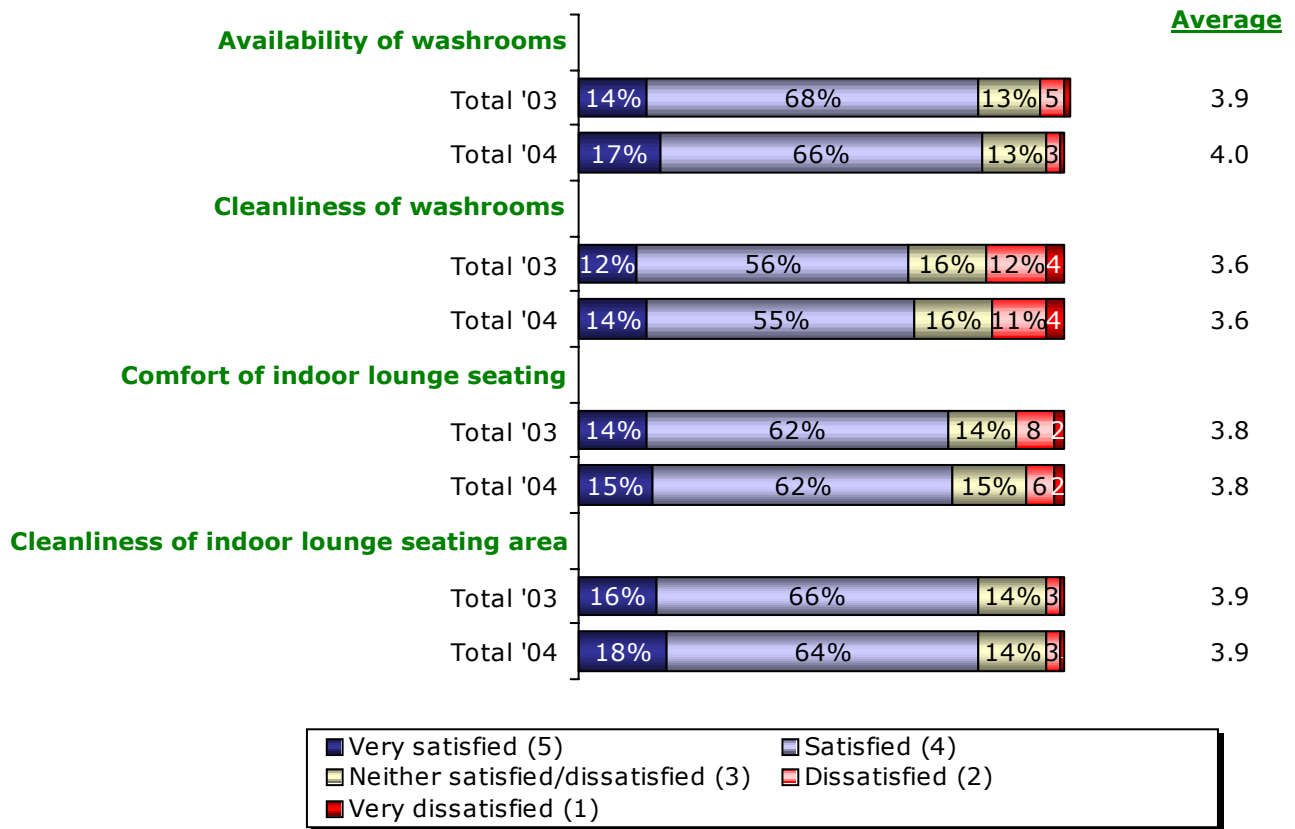


**Onboard Washrooms and Onboard Seating**

Passengers continue to be relatively satisfied with the *availability of washrooms* but more critical of the *cleanliness* on most vessels, with no changes to report year over year.

Travellers continue to be relatively satisfied with the *comfort and cleanliness* of indoor lounge seating with no change in ratings from 2003.

**Satisfaction with Onboard Washrooms and Onboard Seating**

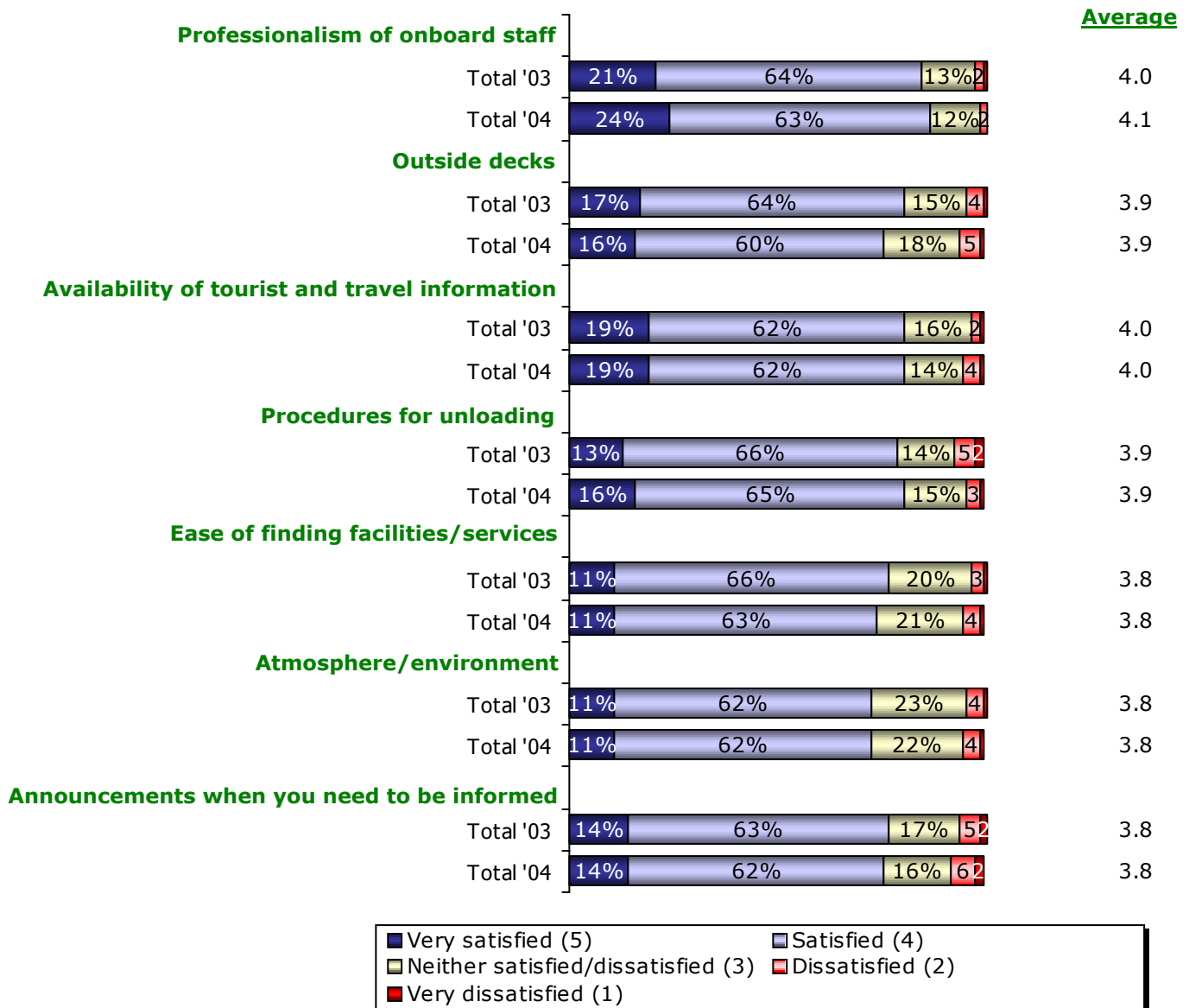


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Other Onboard Facilities/Services**

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

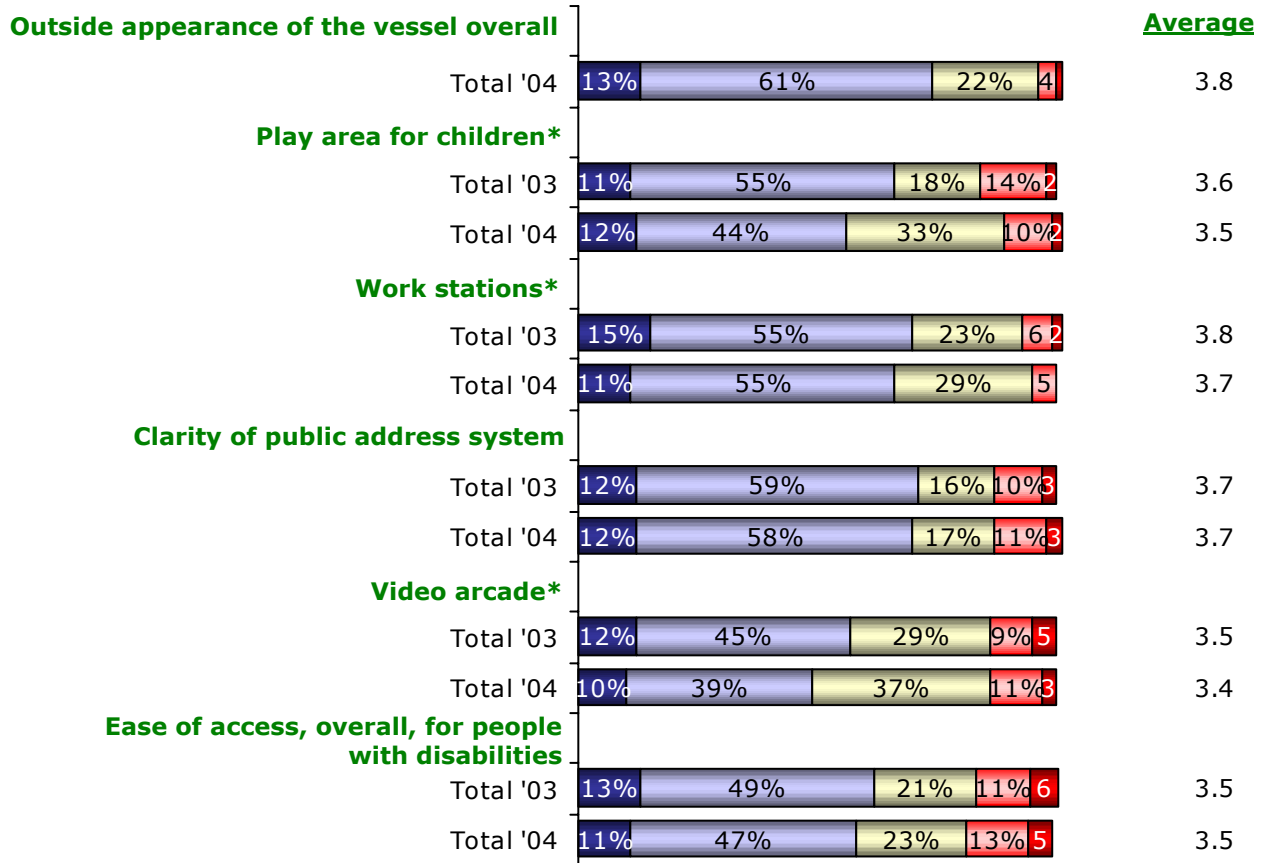
**Satisfaction with Other Facilities/Services Onboard**



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

**Other Onboard Facilities/Services (cont'd)**

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



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

\* Excludes Routes 4, 19 and 23.

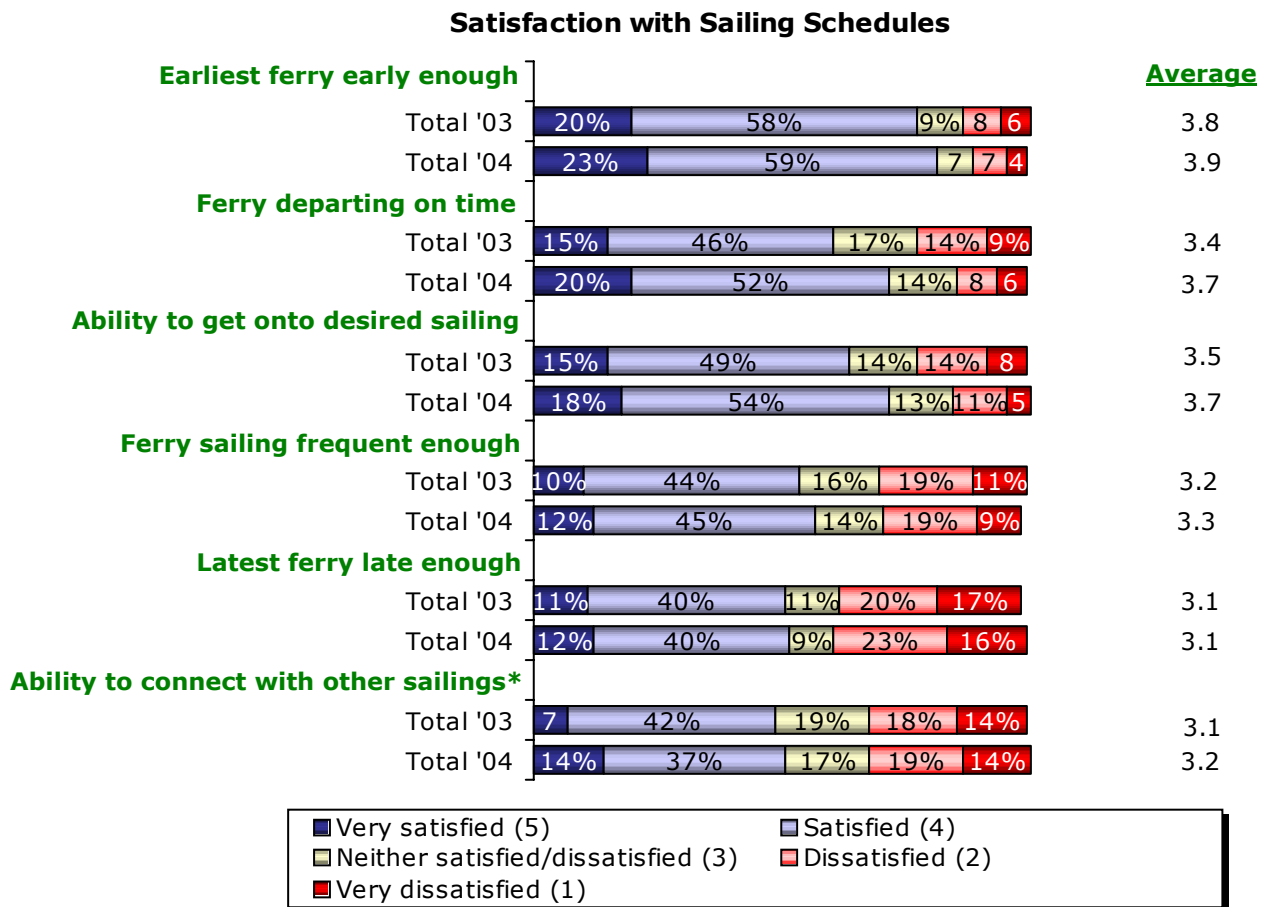
## Sailing Schedules

### Various Aspects of Sailing Schedules

Many aspects of the sailing schedule still are not fully meeting passengers' requirements. However, perceptions have improved over the year with respect to *on-time departures* (72% now satisfied in contrast to 61% a year ago) and *ability to get on their desired sailing* (72% satisfied in contrast to 64% a year ago). Passengers continue to be critical of *sailing frequency*, *last ferry late enough* and the *ability to make connections*.

Differences by route follow a pattern similar to last year, specifically:

- *On-time departures*: Route 1 and minor routes except 5/9 have the highest ratings, Routes 2 and 5/9 have the worst.
- *Ability to get onto desired sailing*: Route 19 passengers claim to have the most difficulty.
- *Sailing frequency*: Route 3 has the lowest rating.
- *Latest ferry late enough*: Routes 3 and 4 record the lowest ratings.



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

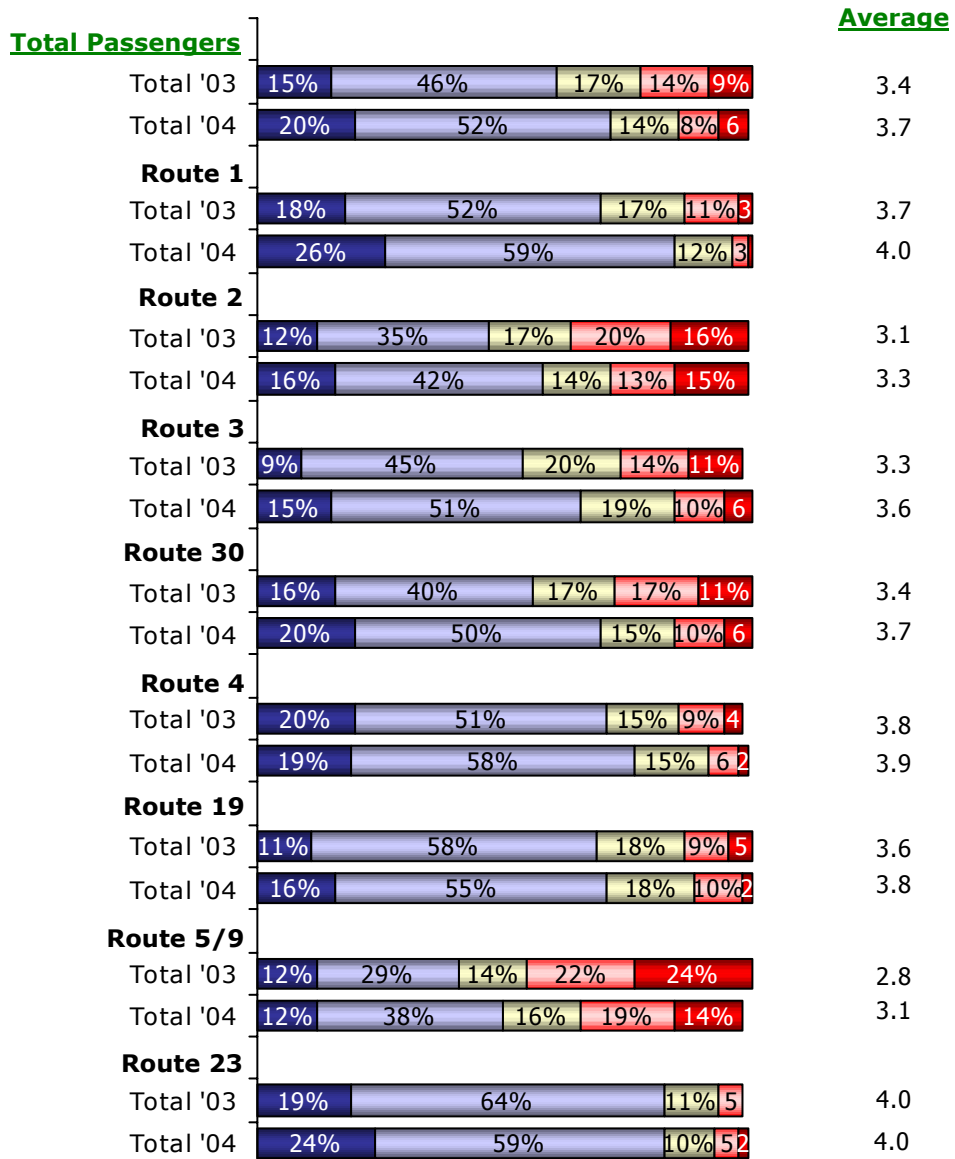
\* Based on those connecting (n=275).

**Departing on Time**

The following graph details the ratings for “departing on time” by route. Ratings have improved on almost all routes. As noted earlier, Route 1 and the minor routes (except 5/9) have the highest ratings, and Routes 2 and 5/9 have the worst. It appears that these routes are most affected by the increase in volume during the peak season.

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

**Satisfaction with "Departing on Time"**



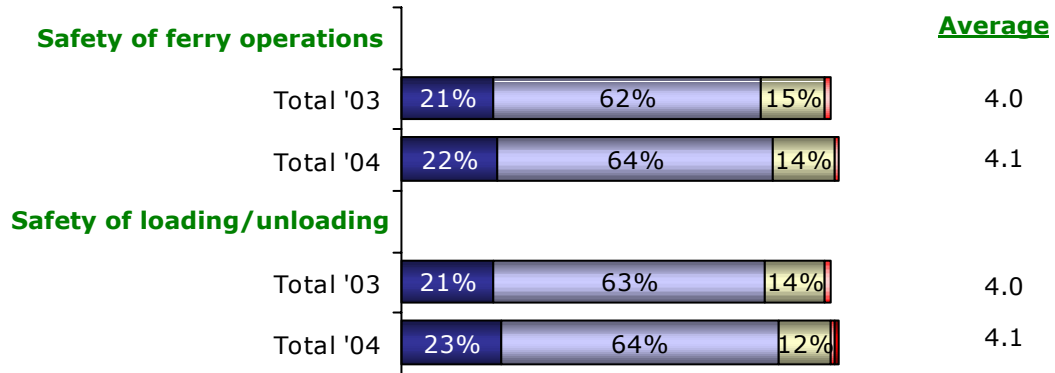
Very satisfied (5)
  Satisfied (4)
  Neither satisfied/dissatisfied (3)
  Dissatisfied (2)
  Very dissatisfied (1)

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

## Safety

Perceptions of the *safety of the ferry operations* continue to be quite strong on all routes, with no significant change from last year. The safety of loading/unloading follows virtually the same pattern.

### Satisfaction with Aspects of Safety



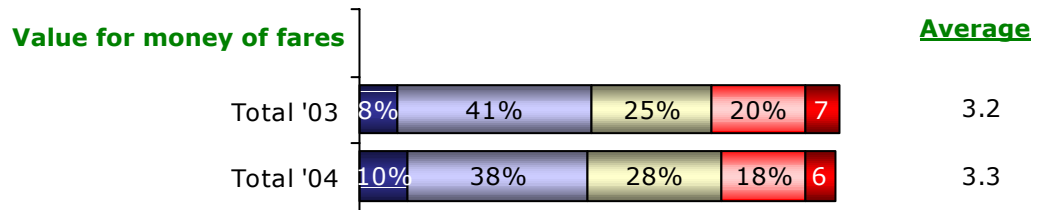
Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

## Overall Value

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Satisfaction levels continue to be low with perceived *value for money of fares*, with no significant change in perception to report.

### Satisfaction with Overall Value



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

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

# Appendices

## Route-by-Route Satisfaction Score for Each Attribute:

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Ferry Routes Included in Customer Satisfaction Survey - 2004	
Route No.	Description of Route
Route 1	Tsawwassen-Swartz Bay
Route 2	Horseshoe Bay-Departure Bay
Route 3	Horseshoe Bay-Langdale
Route 30	Tsawwassen-Duke Point
Route 4	Swartz Bay-Fulford Harbour, Salt Spring Island
Route 19	Departure Bay-Descanso Bay, Gabriola Island
Route 5/9	Southern Gulf Islands (from Swartz Bay/from Tsawwassen)
Route 23	Campbell River-Quathiaski Cove, Quadra Island

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



<b>Average Satisfaction Ratings by Route - Total 2004</b> (see page 30 for Route Number Codes)											
	<b>Total</b>	<b>Larger Routes</b>			<b>Route 3</b>	<b>Smaller Routes</b>					
		<b>Total</b>	<b>1</b>	<b>2</b>		<b>30</b>	<b>Total</b>	<b>4</b>	<b>19</b>	<b>5/9</b>	<b>23</b>
<b>OVERALL EXPERIENCE</b>											
Trip overall	4.1	4.1	4.2	3.9	4.1	4.2	4.1	4.2	4.1	4.0	4.2
<b>BEFORE ARRIVING AT TERMINAL</b>											
Usefulness of BC Ferries website	4.3	4.3	4.3	4.3	4.4	4.2	4.2	4.2	4.2	4.2	4.2
Ease of using on-line reservations	4.0	4.1	4.0	4.1	4.2	4.0	4.0	3.8	4.1	4.0	4.0
Usefulness of BC Ferries phone service	3.6	3.6	3.7	3.6	3.5	3.3	3.7	3.7	3.6	3.9	3.4
Ease of using automated phone service	3.2	3.3	3.3	3.3	3.2	3.0	3.2	3.1	3.2	3.4	3.0
Highway signage	3.8	3.9	3.9	3.8	4.0	3.6	3.8	3.9	3.6	4.0	3.8
<b>TERMINAL EXPERIENCE</b>											
Terminal overall	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.8	3.9	3.9
Outside appearance of the terminal	3.8	3.9	3.9	3.9	3.9	3.8	3.7	3.8	3.6	3.8	3.8
<b>Ticket Purchase</b>											
Efficiency of the transaction	4.4	4.4	4.4	4.4	4.5	4.3	4.4	4.2	4.5	4.4	4.3
Staff courtesy	4.4	4.4	4.4	4.4	4.4	4.3	4.4	4.3	4.5	4.5	4.5
Clarity of staff directions	4.3	4.3	4.3	4.2	4.3	4.2	4.4	4.3	4.5	4.4	4.4
<b>Food &amp; Beverage Services at the Terminal</b>											
Food beverages offered	3.1	3.2	3.2	3.2	3.0	2.9	3.0	3.1	-	3.0	-
Value for money	2.8	2.8	2.8	2.8	2.8	2.7	2.8	2.9	-	2.8	-
<b>Gift Shop/News Stand at the Terminal</b>											
Variety/selection of merchandise	3.4	3.5	3.5	3.5	3.3	3.2	3.1	3.2	-	3.1	-
Value for money	3.1	3.1	3.1	3.2	3.1	3.1	3.0	3.2	-	2.9	-
<b>Outdoor Market Area at the Terminal</b>											
Variety/selection of merchandise	3.3	3.4	3.4	3.5	3.2	2.9	3.5	3.7	-	3.3	-
Value for money	3.2	3.3	3.3	3.3	3.1	3.0	3.3	3.5	-	3.2	-
<b>Other Terminal Services</b>											
Clarity of Public address system	3.4	3.4	3.5	3.4	3.4	3.4	3.3	3.2	3.1	3.3	-
Announcements when you need to be informed	3.6	3.7	3.7	3.6	3.7	3.6	3.6	3.5	3.5	3.6	3.7
Overall look/décor inside the terminal	3.6	3.7	3.7	3.6	3.8	3.5	3.6	3.6	-	3.7	-
Availability of washrooms	3.9	3.9	3.9	3.8	3.9	3.8	3.9	4.0	3.8	4.0	4.0
Cleanliness of washrooms	3.6	3.6	3.7	3.5	3.8	3.5	3.7	3.8	3.4	3.9	3.9
Procedures for loading	3.9	4.0	4.0	3.9	4.0	3.8	4.0	3.9	4.1	3.8	4.1
Professionalism of terminal staff	4.0	4.0	4.1	3.9	4.0	3.9	4.2	4.0	4.3	4.1	4.3

continued

<b>Average Satisfaction Ratings by Route - Total 2004 (cont'd)</b> (see page 30 for Route Number Codes)											
	<b>Total</b>	<b>Larger Routes</b>			<b>Route 3</b>	<b>Smaller Routes</b>					
		<b>Total</b>	<b>1</b>	<b>2</b>		<b>30</b>	<b>Total</b>	<b>4</b>	<b>19</b>	<b>5/9</b>	<b>23</b>
<b>Foot Passenger Services at the Terminal</b>											
Usefulness of TV Info Screens	3.3	3.4	3.4	3.3	3.4	2.7	4.1	4.1	-	-	-
Availability of parking spaces	3.2	3.2	3.2	3.2	3.3	3.6	2.7	3.1	2.4	3.1	-
Parking value for money	2.3	2.1	2.1	2.2	1.9	3.0	2.6	2.1	2.9	2.1	-
Ease of using passenger drop-off/ pick-up area	3.4	3.4	3.3	3.7	3.2	3.7	3.5	2.9	3.3	3.5	4.1
Availability of seating in pre-boarding lounge at terminal	3.5	3.5	3.5	3.5	3.4	3.5	3.5	3.4	3.5	3.5	3.6
Comfort of seating in pre-boarding lounge at terminal	3.3	3.4	3.5	3.2	3.2	3.2	3.0	3.2	2.9	3.2	3.0
Cleanliness of pre-boarding lounge	3.6	3.7	3.6	3.7	3.7	3.4	3.6	3.7	3.6	3.6	3.5
<b>ONBOARD EXPERIENCE</b>											
Onboard overall	4.0	4.0	4.1	4.0	3.9	4.0	4.0	3.9	3.9	3.9	4.1
<b>Gift Shop/ News Stand</b>											
Variety/ selection of merchandise	3.9	3.9	3.9	3.8	3.8	3.9	3.6	-	-	3.6	-
Staff courtesy	4.0	4.0	4.0	4.0	4.0	4.0	4.1	-	-	4.1	-
Ease of moving around inside shop	3.2	3.3	3.3	3.2	3.0	3.1	3.4	-	-	3.4	-
Value for money	3.3	3.2	3.3	3.2	3.3	3.4	3.3	-	-	3.3	-
<b>Food Services</b>											
Length of time in line for food services	3.5	3.4	3.5	3.4	3.5	3.5	3.8	-	-	3.8	-
Food/ beverages offered	3.4	3.4	3.4	3.5	3.5	3.4	3.1	-	-	3.1	-
Staff courtesy	4.1	4.1	4.1	4.1	4.1	4.1	4.2	-	-	4.2	-
Availability of seating	3.9	3.9	3.9	3.9	3.9	4.1	4.1	-	-	4.1	-
Comfort of seating	3.7	3.7	3.7	3.8	3.5	3.8	3.4	-	-	3.4	-
Cleanliness of seating area	3.9	3.9	3.9	4.0	3.9	4.0	4.0	-	-	4.0	-
Value for money	3.2	3.2	3.2	3.1	3.2	3.2	3.1	-	-	3.1	-
<b>Washrooms</b>											
Availability of washrooms	4.0	4.0	4.0	3.9	4.0	4.0	3.9	3.9	3.7	4.0	4.1
Cleanliness of washrooms	3.6	3.6	3.7	3.5	3.7	3.7	3.6	3.7	3.2	3.9	3.9
<b>Lounge Seating</b>											
Comfort of indoor lounge seating	3.8	3.9	3.9	3.8	3.7	3.9	3.3	2.8	2.8	3.6	3.9
Cleanliness of indoor lounge seating area	3.9	4.0	4.0	4.0	4.0	4.0	3.8	3.7	3.4	4.0	4.0

continued

<b>Average Satisfaction Ratings by Route - Total 2004 (cont'd)</b> (see page 30 for Route Number Codes)											
	<b>Total</b>	<b>Larger Routes</b>			<b>Route 3</b>	<b>Smaller Routes</b>					
		<b>Total</b>	<b>1</b>	<b>2</b>		<b>30</b>	<b>Total</b>	<b>4</b>	<b>19</b>	<b>5/9</b>	<b>23</b>
<b>Other Onboard Facilities/ Services</b>											
Play area for children	3.5	3.6	3.8	3.4	3.5	3.4	3.4	-	-	3.4	-
Video arcade	3.4	3.6	3.8	3.4	3.3	3.0	3.1	-	-	3.1	-
Work stations	3.7	3.8	3.9	3.8	3.4	3.5	3.5	-	-	3.5	-
Outside decks	3.9	3.9	4.0	3.8	3.8	3.8	3.8	3.8	3.6	3.8	4.0
Outside appearance of the Vessel overall	3.8	3.8	3.9	3.7	3.7	3.7	3.8	3.9	3.7	3.8	3.9
Availability of tourist and travel information	4.0	4.0	4.0	4.0	4.0	4.0	3.7	3.8	3.3	3.9	3.8
Ease of access, overall, for people with disabilities	3.5	3.6	3.6	3.7	3.8	3.4	3.1	3.6	2.9	3.4	2.7
Ease of finding facilities/ services	3.8	3.8	3.8	3.8	3.8	3.8	3.7	3.7	3.4	3.9	3.8
Clarity of public address system	3.7	3.7	3.7	3.7	3.6	3.8	3.4	3.5	3.2	3.6	3.3
Announcements when you need to be informed	3.8	3.8	3.8	3.8	3.8	3.9	3.6	3.7	3.4	3.7	3.6
Atmosphere/ environment	3.8	3.8	3.9	3.8	3.6	3.8	3.6	3.6	3.4	3.8	3.8
Procedures for unloading	3.9	3.9	4.0	3.8	3.9	3.9	4.0	3.9	4.1	3.8	4.1
Professionalism with onboard staff	4.1	4.1	4.1	4.0	4.0	4.1	4.1	4.0	4.2	4.1	4.2
<b>Experience with the Sailing Schedule</b>											
Earliest ferry earliest enough	3.9	3.8	3.8	3.9	4.0	3.9	4.0	3.9	4.2	3.8	4.0
Latest ferry late enough	3.0	3.2	3.2	3.0	3.6	2.5	3.3	2.8	3.3	3.5	3.6
Ferry sailing frequent enough	3.3	3.4	3.5	3.1	3.1	2.8	3.6	3.5	3.7	3.1	3.8
Ability to get onto desired ferry	3.7	3.7	3.8	3.6	3.7	3.6	3.6	3.8	3.3	3.8	3.5
Ability to connect with other sailings	3.2	2.9	3.2	2.7	2.8	3.4	3.4	3.8	3.3	2.9	3.2
Ferry departing on time	3.7	3.8	4.0	3.3	3.7	3.6	3.7	3.9	3.7	2.9	4.0
<b>Safety</b>											
Safety of ferry operations	4.1	4.1	4.1	4.0	4.0	4.0	4.1	4.1	4.1	4.1	4.2
Safety of loading/unloading	4.1	4.1	4.1	4.0	4.0	4.1	4.2	4.2	4.1	4.1	4.2
<b>OVERALL VALUE</b>											
Value for money of fares	3.3	3.2	3.3	3.1	3.0	3.3	3.5	3.5	3.5	3.5	3.3

<b>TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal - Total 2004</b>							
	<b>Total</b>	<b>Tsawwassen</b>	<b>Swartz Bay</b>	<b>Horseshoe Bay</b>	<b>Departure Bay</b>	<b>Langdale</b>	<b>Duke Point</b>
<b>OVERALL EXPERIENCE</b>							
Overall	4.1	4.2	4.3	4.0	4.0	4.2	4.1
<b>TERMINAL EXPERIENCE</b>							
Terminal overall	3.9	3.9	4.0	3.8	3.9	3.8	4.1
Outside appearance of the terminal	3.8	3.7	3.9	3.8	4.0	3.6	4.1
<b>Ticket Purchase</b>							
Efficiency of the transaction	4.4	4.4	4.4	4.3	4.5	4.3	4.5
Staff courtesy	4.4	4.3	4.4	4.3	4.4	4.3	4.5
Clarity of staff directions	4.3	4.3	4.4	4.2	4.3	4.1	4.3
<b>Food &amp; Beverage Services at the Terminal</b>							
Food beverages offered	3.1	3.1	3.2	3.0	3.4	2.9	3.0
Value for money	2.8	2.8	2.9	2.7	3.0	2.7	2.9
<b>Gift Shop/News Stand at the Terminal</b>							
Variety/selection of merchandise	3.4	3.3	3.5	3.3	3.6	3.3	3.4
Value for money	3.1	3.1	3.2	2.9	3.3	3.4	3.0
<b>Outdoor Market Area at the Terminal</b>							
Variety/selection of merchandise	3.3	3.4	3.4	2.9	3.6	3.1	3.1
Value for money	3.2	3.5	3.1	2.9	3.4	3.2	2.9
<b>Other Terminal Services</b>							
Clarity of Public address system	3.4	3.5	3.4	3.4	3.4	3.3	3.4
Announcements when you need to be informed	3.6	3.7	3.7	3.6	3.6	3.5	3.7
Overall look/décor inside the terminal	3.6	3.6	3.7	3.5	3.7	3.3	3.9
Availability of washrooms	3.9	3.8	4.0	3.8	3.8	4.1	4.0
Cleanliness of washrooms	3.6	3.6	3.8	3.5	3.5	3.6	4.0
Procedures for loading	3.9	4.0	4.0	3.8	3.9	3.9	4.1
Professionalism of terminal staff	4.0	4.0	4.2	3.9	4.0	4.0	4.1
<b>Foot Passenger Services at the Terminal</b>							
Usefulness of TV info screens	3.3	3.3	3.5	2.8	3.3	3.1	3.8
Availability of parking spaces	3.2	3.1	3.3	3.1	3.5	3.9	3.4
Parking value for money	2.3	2.0	2.2	2.4	2.3	3.1	2.0
Ease of using passenger drop-off/ pick-up area	3.4	3.2	3.3	3.5	3.9	3.6	3.5
Availability of seating in pre-boarding lounge at terminal	3.5	3.3	3.7	3.5	3.5	3.4	3.5
Comfort of seating in pre-boarding lounge at terminal	3.3	3.3	3.6	3.2	3.3	3.1	3.5
Cleanliness of pre-boarding lounge	3.6	3.6	3.6	3.6	3.6	3.2	4.0
<b>Overall Value</b>							
Value for money of fares	3.3	3.2	3.4	3.2	3.2	3.3	3.2

## **Research Methodology**

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### ***Background***

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

### ***Project Overview***

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

### ***Research Objectives***

The specific objectives are as follows:

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

### ***Sample Selection***

First, a random sample of passengers aged 18 or older was intercepted onboard to collect key "screener" data including frequency of travel on BC Ferries, purpose of trip, area of residence, origin/destination, and standard demographic questions. Each questionnaire also included coding of the route, the departure time, location of interview, the vessel name and any other information of value for internal analysis. This information was collected in the form of a "batch header", which was attached to all the "screeners" completed on each sailing.

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

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

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

**Sample Size**

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

Routes surveyed and the number of screeners and completed returned surveys from each route during 2004 are as follows:

	<b>Screeners</b>	<b>Returns</b>
<b>Larger Routes:</b>	6,858	2,388
Route 1: Tsawwassen-Swartz Bay	1,878	665
Route 2: Horseshoe Bay-Departure bay	2,030	628
Route 3: Horseshoe Bay-Langdale	1,250	511
Route 30: Tsawwassen-Duke Point	1,700	584
<b>Smaller Routes:</b>	6,890	2,015
Route 4: Swartz Bay-Fulford Harbour, Salt Spring Island	1,519	459
Route 19: Departure Bay-Descanso Bay, Gabriola Island	1,431	455
Route 5/9: Southern Gulf Islands	2,105	611
Route 23: Campbell River-Quadra Island	1,835	490
<b>TOTAL</b>	<b>13,748</b>	<b>4,403</b>

**Sample Validation and Weighting**

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

- within each wave, by routes selected for surveying,
- within each route by daypart,

- within each route by weekday and weekend traffic, and
- within the year by known BC Ferries traffic volume by season

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

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

<b>Actual &amp; Weighted Distribution of the Sample -2004 -</b>				
	<b>Screeners</b>		<b>Returns</b>	
	<u>Actual</u> (13,748) %	<u>Weighted</u> (13,748) %	<u>Actual</u> (4,403) %	<u>Weighted</u> (4,658) %
<b>Larger Routes</b>	<b>50</b>	<b>86</b>	<b>54</b>	<b>83</b>
Weekend	14	28	16	26
30	4	2	4	3
3	2	6	4	7
2	4	6	4	5
1	4	13	5	11
Weekday	36	59	38	57
30	9	4	9	5
3	7	12	8	13
2	11	15	11	13
1	10	28	11	26
<b>Smaller Routes</b>	<b>50</b>	<b>19</b>	<b>46</b>	<b>17</b>
Weekend	14	5	11	4
19	2	1	2	1
4	3	1	3	1
5/9	5	1	4	1
23	4	1	3	1
Weekday	36	15	34	13
19	8	4	9	4
4	8	3	8	3
5/9	11	3	10	3
23	9	4	8	4

**Data Collection**

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

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

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

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

### ***Data Analysis***

The data entry system used for this study includes an internal edit program. This immediate verification during the data entry process reduces entry error. After entry of the data, a further more detailed computer edit is performed. For standard cross-tabulations, software designed expressly for marketing research was employed. Special editing and cleaning features of this database package ensure that the records are data entered and coded with accuracy. Further rigorous checks for inherent logic and consistency were performed prior to final data tabulation.



**Response Rate**

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

<b>Response Rates</b>	
<b>Larger Routes</b>	<b>Total 2004</b>
Route 1	35%
Route 2	31%
Route 3	41%
Route 30	34%
<b>Smaller Routes</b>	
Route 4	30%
Route 19	32%
Route 5/9	29%
Route 23	27%
<b>Overall response</b>	<b>32%</b>

**Margin of Error**

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

<b>Tolerance Limits – 2004</b>		
	<b>Actual Sample Size</b>	<b>Approximate Tolerance Limits % Points</b>
Total Screeners	13,748	+/-0.8%
Total Returns	4,403	+/-1.5%
Total Larger Route Returns	2,388	+/-2.0%
Total Smaller Route Returns	2,015	+/-2.2%

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