

# **Customer Satisfaction Tracking Annual Report 2003**

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

### **Presented to:**

British Columbia Ferry Services Inc.  
Victoria, British Columbia



MUSTEL GROUP

402 - 1505 West Second Avenue Vancouver BC V6H 3Y4

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

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# Executive Overview

## Background

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Beginning April 2003, BC Ferry Corporation changed from being a Crown Corporation to become British Columbia Ferry Services Inc., an independent regulated company referred to as BC Ferries. The new company provides ferry services to its customers under terms defined in the Coastal Ferry Services Contract between the Province of British Columbia and BC Ferries.

One of the many terms of that contract is that BC Ferries hire an independent professional market research firm to conduct a customer satisfaction survey each year. The annual results of that survey are to be reported to the Government of British Columbia, to the Independent Regulator who is appointed to monitor adherence to the Coastal Ferry Services Contract and to the public via posting on the BC Ferries website.

To fully satisfy the terms of the contract as specified, this report provides annual customer satisfaction results for the following:

- Overall ferry service, including a comparison with stated objectives
- 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

In keeping with the spirit of the agreement, this report also includes in the Appendix detailed tables of satisfaction scores for all 65 service attributes by route. The Appendix also includes detailed satisfaction scores for the 25 terminal-related attributes, broken out by major terminal.

## Methodology

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

A total of 11,539 screener interviews were conducted and 3,626 questionnaires were completed and returned. Interviews were distributed across major and minor routes over the year during three different periods: 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. Further explanation of the research design can be found in the *Research Methodology* section of the report in the Appendix.

## Findings

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Customers were asked to rate their satisfaction with 65 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**

- In 2003, 82% of passengers report being satisfied overall with their experience travelling with BC Ferries, translating to an average score of 4.0 on a 5-point scale where 5 means Very Satisfied.
- This compares favourably with the stated management objective. As recorded in the *Corporate Strategic Plan 2003-2025* posted on the BC Ferries website, the objective for overall customer satisfaction for 2003 is 4.0 out of 5; this objective was achieved.

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

- Passengers who used the BC Ferries website are quite satisfied with the *usefulness* of the site, and *ease of using online reservations*.
- Passengers making phone contact with BC Ferries are less complimentary of the *usefulness of BC Ferries phone service*, and specifically of the *ease of using the automated system*.
- Highway signage receives a reasonably consistent high rating of 3.9; passengers at Langdale and Horseshoe Bay terminals, however, are slightly less satisfied than others.

### **Satisfaction at the Terminal**

- Passengers provided an overall satisfaction rating of 3.9 with their terminal experience before boarding.

- Passengers who did not get on their desired sailing are understandably less satisfied with their terminal experience.
- Satisfaction levels are high with all aspects of the ticket purchase process, including satisfaction with *staff courtesy*, with the *efficiency of the transaction* and with the *clarity of directions* about where to go.
- Passengers using food/beverage and retail services at the terminal are critical of the *selection* and the *value for money*.
- Foot passengers are not particularly satisfied with many of their services. Dissatisfaction with parking *availability* and *value for money* of parking is highest among foot passengers at Horseshoe Bay and Departure Bay.
- Among other terminal services, passengers are most positive about the *professionalism of terminal staff*, *procedures for loading*, and *availability of washrooms* at the terminal. Satisfaction levels are slightly lower with respect to *cleanliness of washrooms*, and with *announcements when you need to be informed*. The *clarity of the public address system* receives the most criticism of all these terminal services.

### **Satisfaction Onboard**

- A total of 83% of passengers are satisfied with their overall experience onboard. For the most part, this satisfaction level does not vary by route; however, it is slightly lower (75%) on Route 4 between Swartz Bay and Saltspring Island.
- With respect to the gift shop/news stand, satisfaction levels are relatively high for *staff courtesy* and *variety/selection of merchandise*. Ratings are low, however, for *ease of moving around inside the shop* and *value for money*.
- Food services perform well on *staff courtesy*, *cleanliness of seating area*, and *availability of seating*. Satisfaction levels are lower with respect to *comfort of seating*, *length of time in line*, *food/beverages offered* and *value for money*.
- Passengers are relatively satisfied with the *availability of washrooms* but are more critical of the *cleanliness*.
- Travellers are generally satisfied with the *comfort* and *cleanliness* of indoor lounge seating.

- In terms of other onboard facilities and services, satisfaction levels are quite consistent, with passengers most complimentary of the *professionalism of onboard staff*, and least satisfied with the *video arcade*, and *ease of access for people with disabilities*.

### **Satisfaction with Sailing Schedules**

- Customers are reasonably satisfied with *earliest ferry early enough*. However, many aspects of the sailing schedule are not fully meeting passenger needs; they are least satisfied with the *latest ferry late enough* and the *ability to connect with other sailings* (for those connecting).

### **Satisfaction with Safety**

- Perceptions of the *safety of the ferry operations* are consistently strong overall and on all routes. This appears to be one of the main strengths of the service offered by BC Ferries.

### **Satisfaction with Overall Value**

- Satisfaction levels are low with perceived *value for money of the fares*. Further analysis shows that travellers who were unable to get on the sailing they arrived for are most critical of *value for money*, while older passengers and tourists 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.

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

- 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-five 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, and where appropriate the route-by-route scores are shown as well.

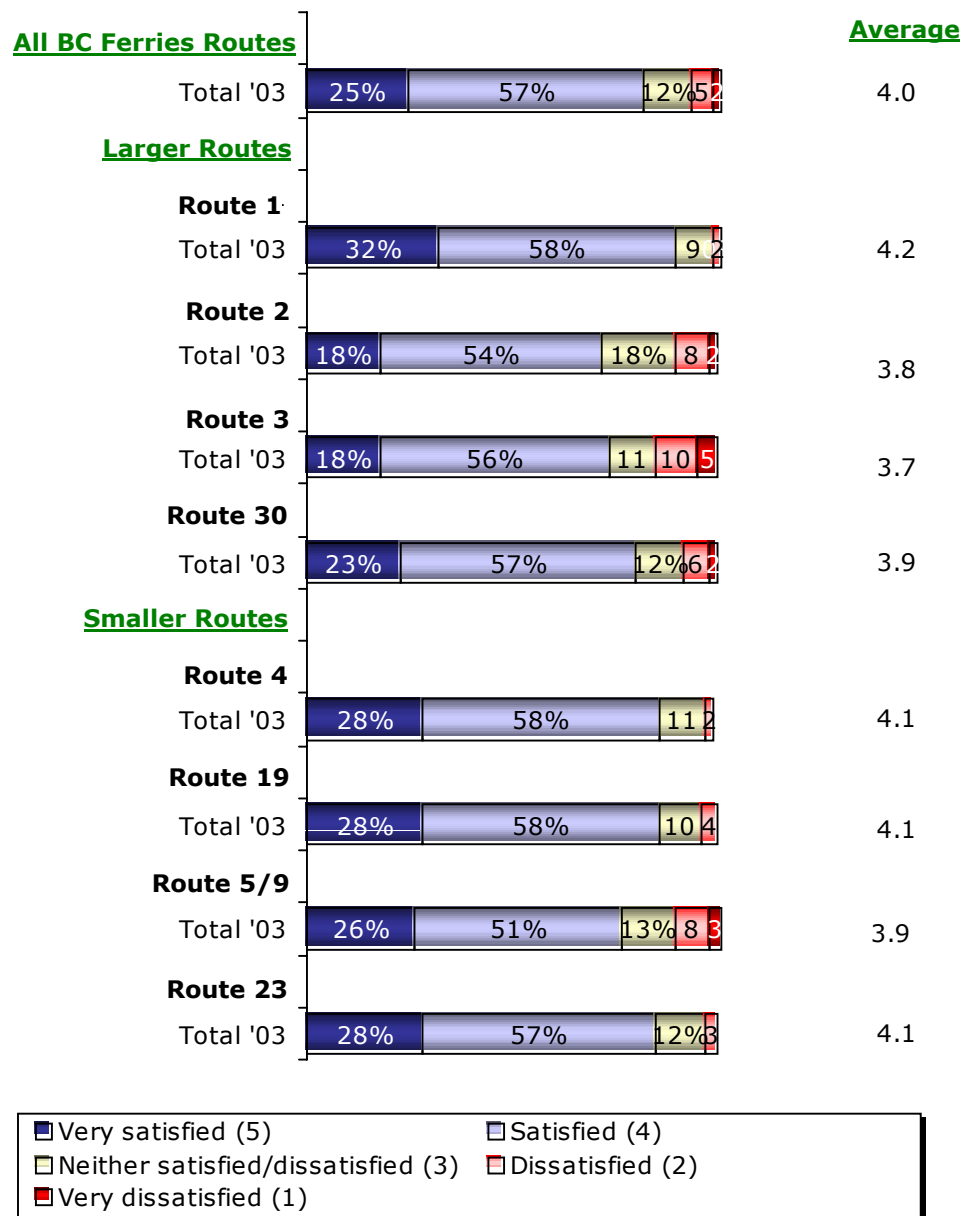
**NOTE: When route numbers are shown in the graphs, please refer to the following table that explains each route number.**

<b>Ferry Routes Included in Customer Satisfaction Survey - 2003</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, Saltspring 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

- Over the year, 82% of passengers report being satisfied. This translates to an average score of 4.0 on a five-point scale where '1' means 'very dissatisfied' and '5' means 'very satisfied'. [NOTE: Refer to page 6 for Route number codes]
- Ratings by route are also relatively consistent, ranging from 3.7 for Route 3 to 4.2 for Route 1. All other routes scored between 3.8 and 4.1 out of 5.

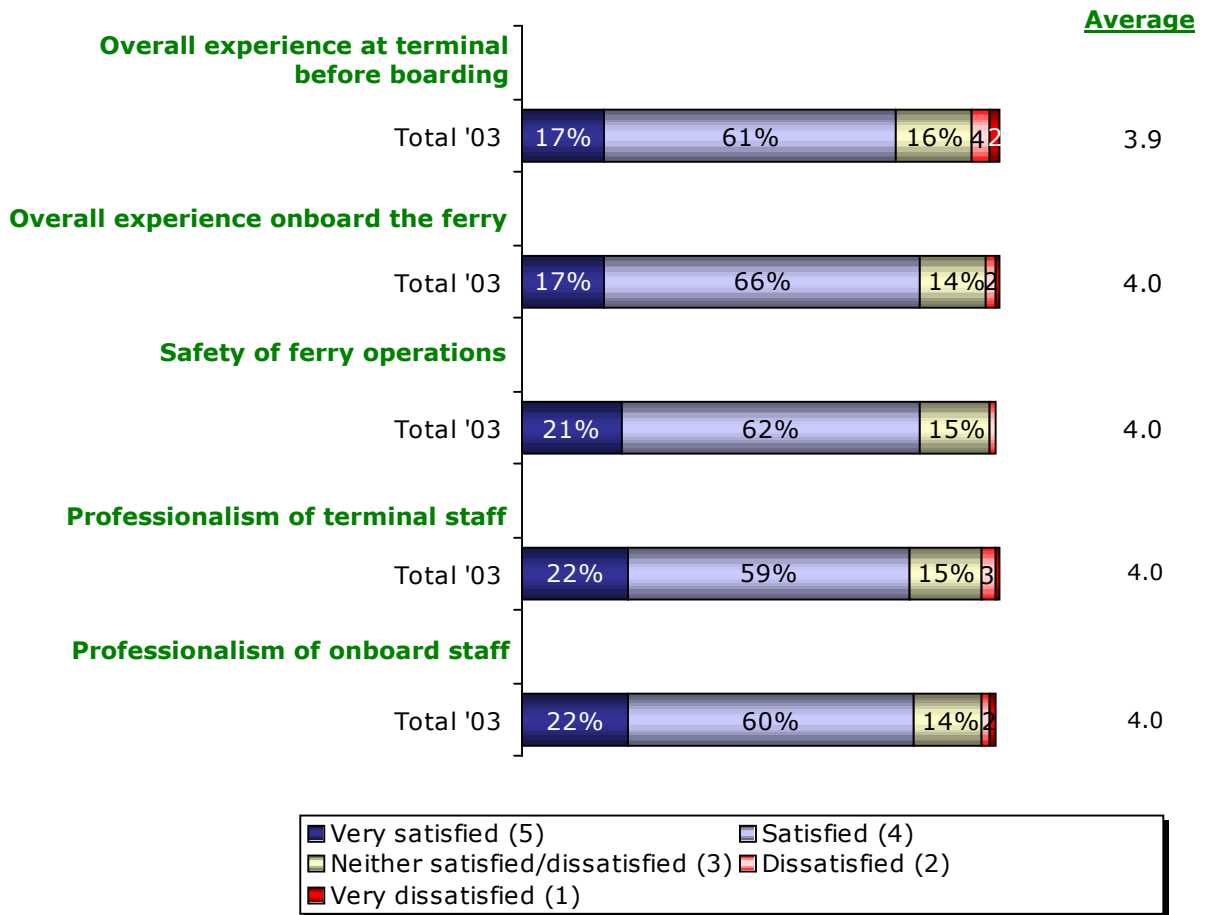
### Overall Satisfaction Level with Recent Experience Travelling with BC Ferries



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. Most results are consistent at 4.0 out of 5, with experience at the terminal scoring slightly lower at 3.9 out of 5.

**Summary of Main Satisfaction Scores**

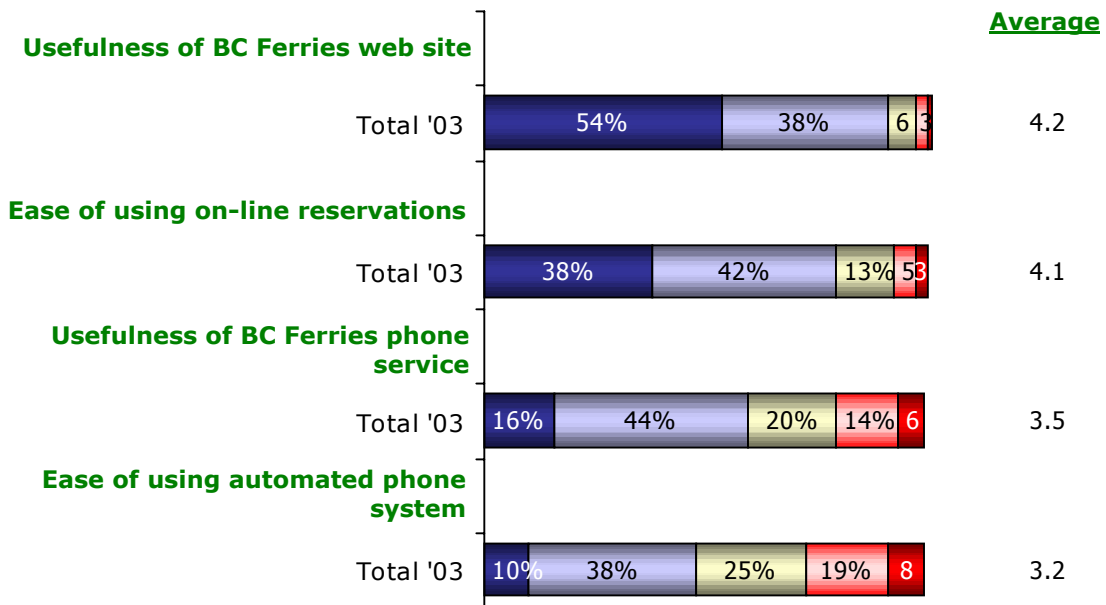


## Before Arriving at Terminal

### Web Site and Phone Contact

- Passengers who used the Web site are quite satisfied with the *usefulness* of the site, and *ease of using online reservations*.
- Passengers making phone contact with BC Ferries are less complimentary of the *usefulness of BC Ferries phone service*, and specifically of *ease of using the automated system*.

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



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

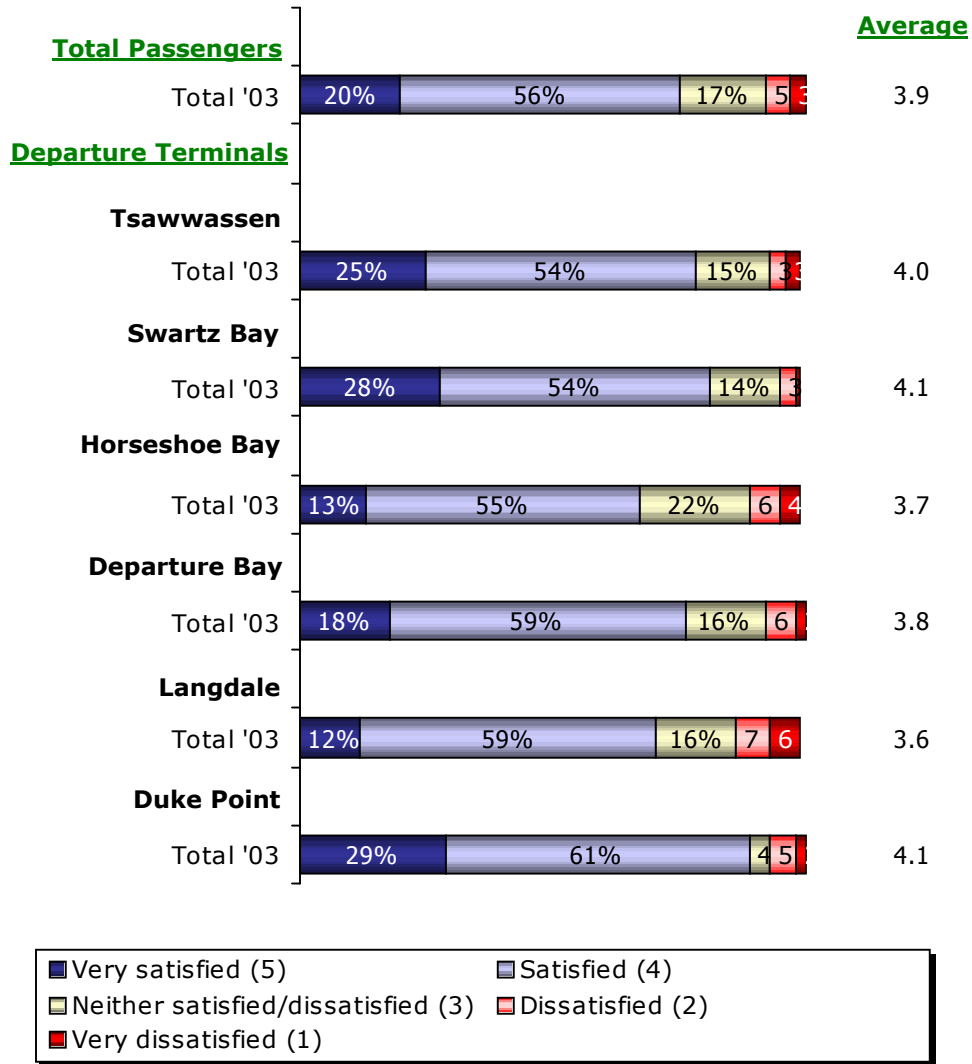
\* 46% usage website, 25% usage on-line reservations.

\*\* 35% usage phone service, 27% usage automated phone system.

**Highway Signage**

- Highway signage receives a rating of 3.9, with Langdale and Horseshoe Bay terminal passengers slightly less satisfied than others.

**Satisfaction with Highway Signage\***



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

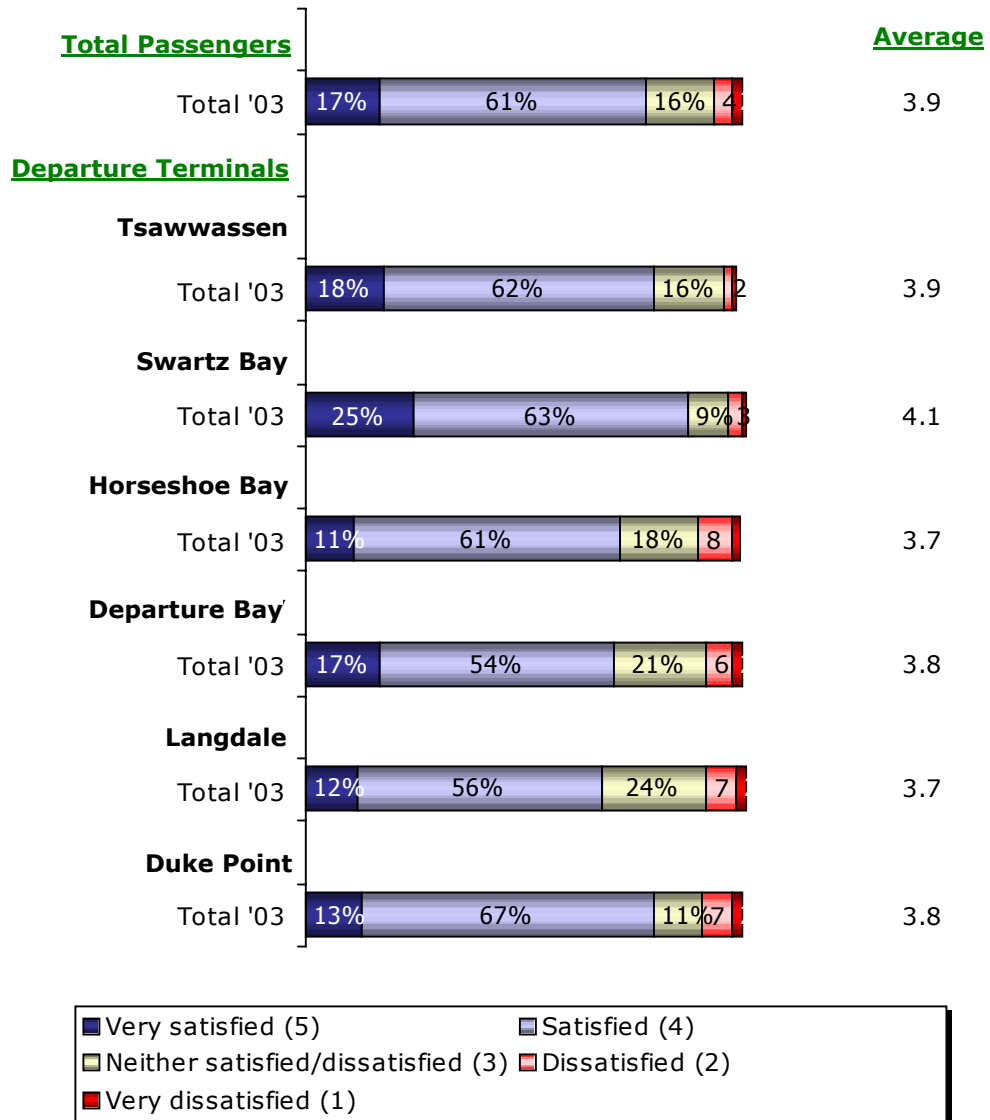
\* Usage: 74%

## At the Terminal

### Overall Experience

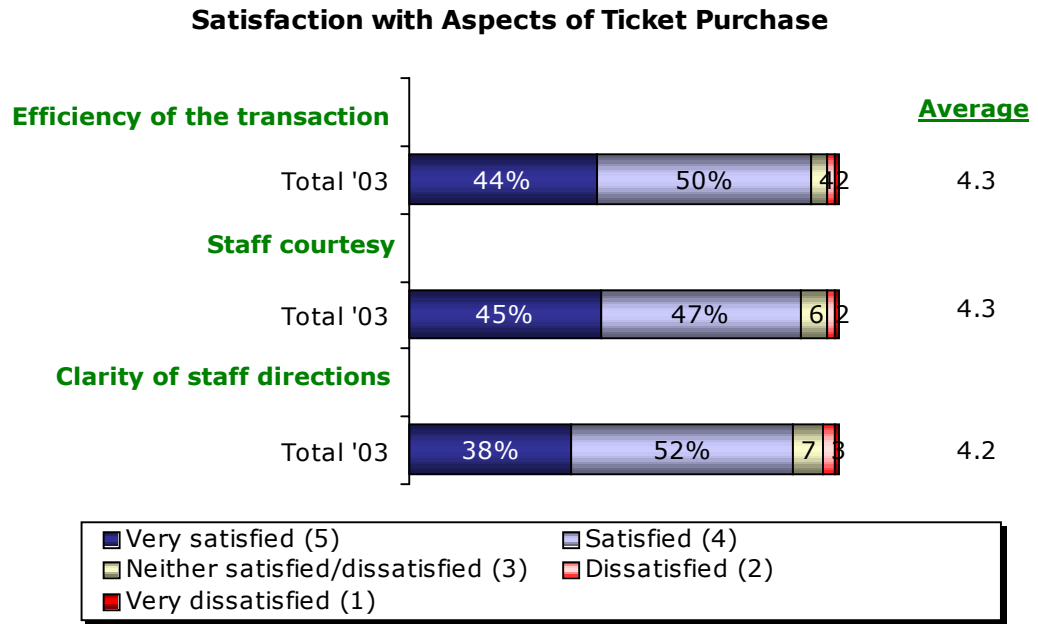
- Passengers provided an overall satisfaction rating of 3.9 with their terminal experience before boarding. Scores by terminal are similar ranging from 3.7 at Horseshoe Bay and Langdale to 4.1 at Swartz Bay.

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



**Ticket Purchase**

- Satisfaction levels are very high with all aspects of the ticket purchase process.

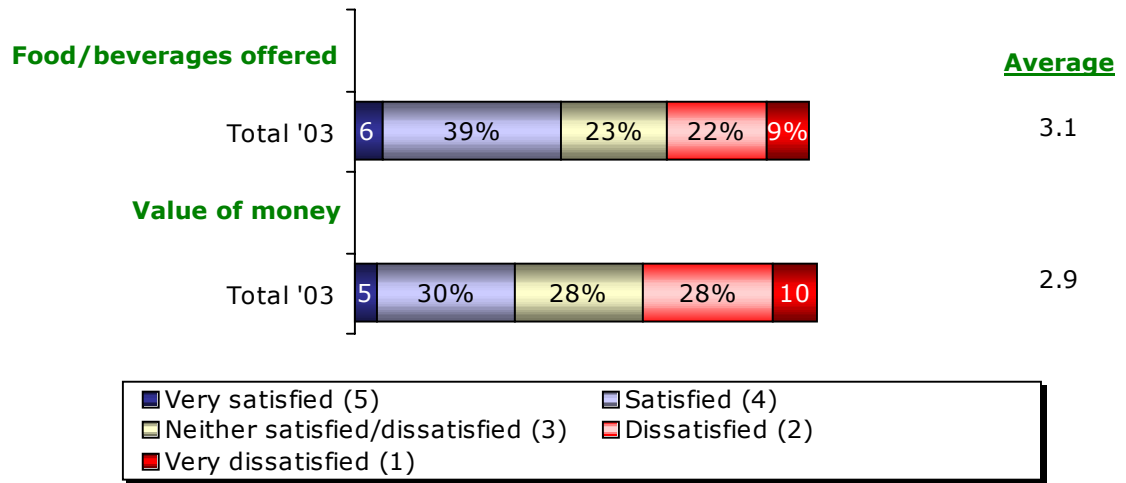


Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

**Food/Beverage Services at Terminal**

- Passengers using food and beverage services at the terminal are critical of the *food/beverage offered* and with *value for money*.

**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.

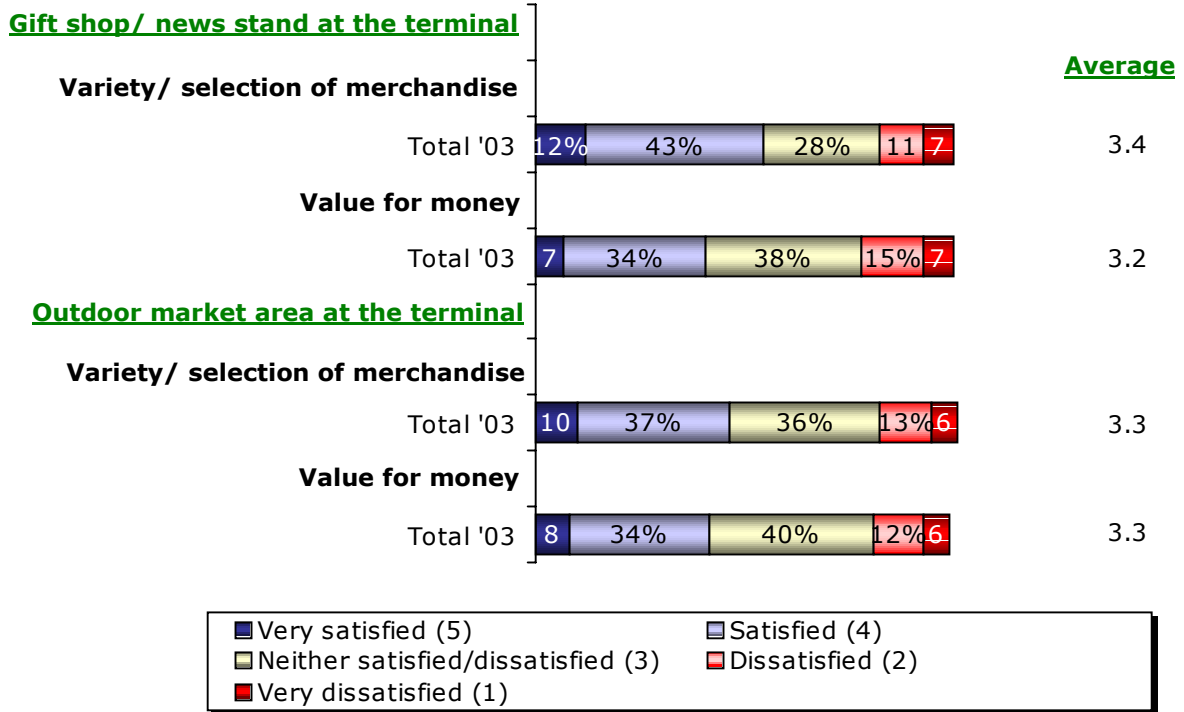
\* 34% usage overall; excludes Routes 19 and 23.



**Retail Services at Terminal**

- Satisfaction levels with retail services at the terminal are above those for food and beverage services, but also show room for improvement.

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



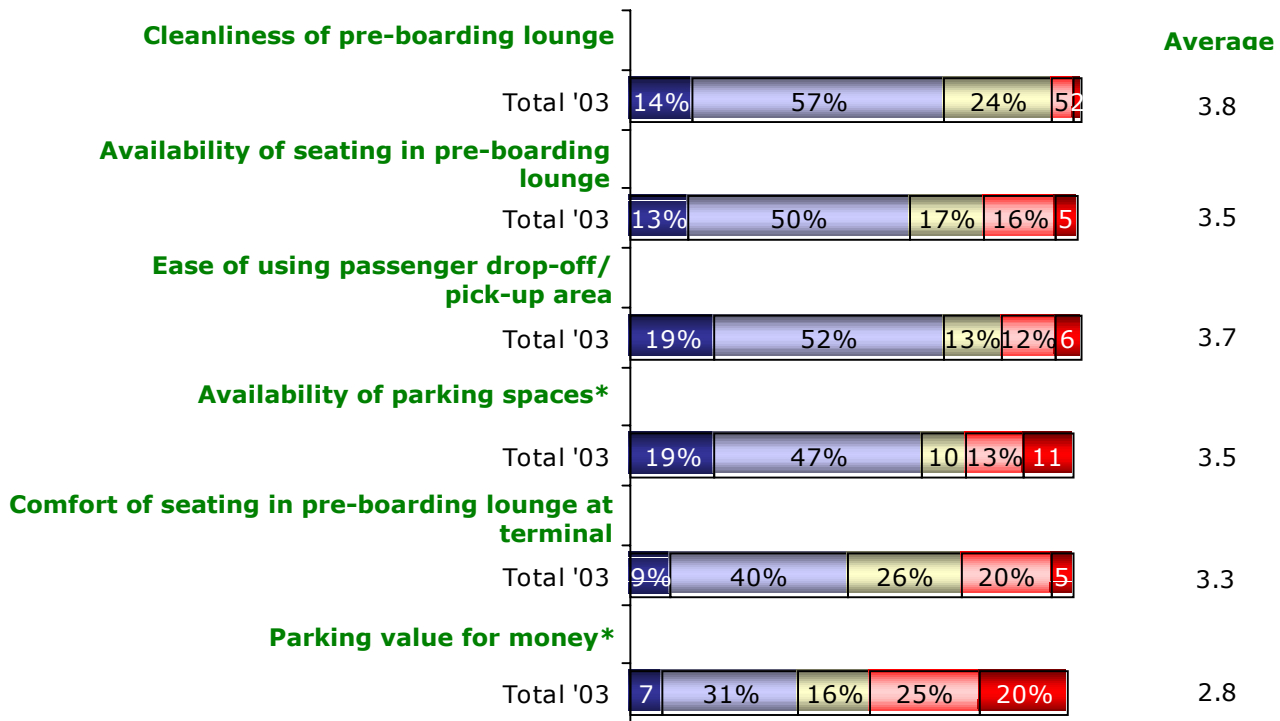
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

\*23% usage gift shop, 22% usage outdoor market; excludes Routes 19 and 23.

**Foot Passenger Services**

- Overall, foot passengers are not particularly satisfied with many of their services, especially with *value for money* of parking.
- Dissatisfaction with *availability* and *value for money* of parking is highest with the Horseshoe Bay and Departure Bay terminal services for foot passengers.

**Satisfaction with Foot Passenger Services\***



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

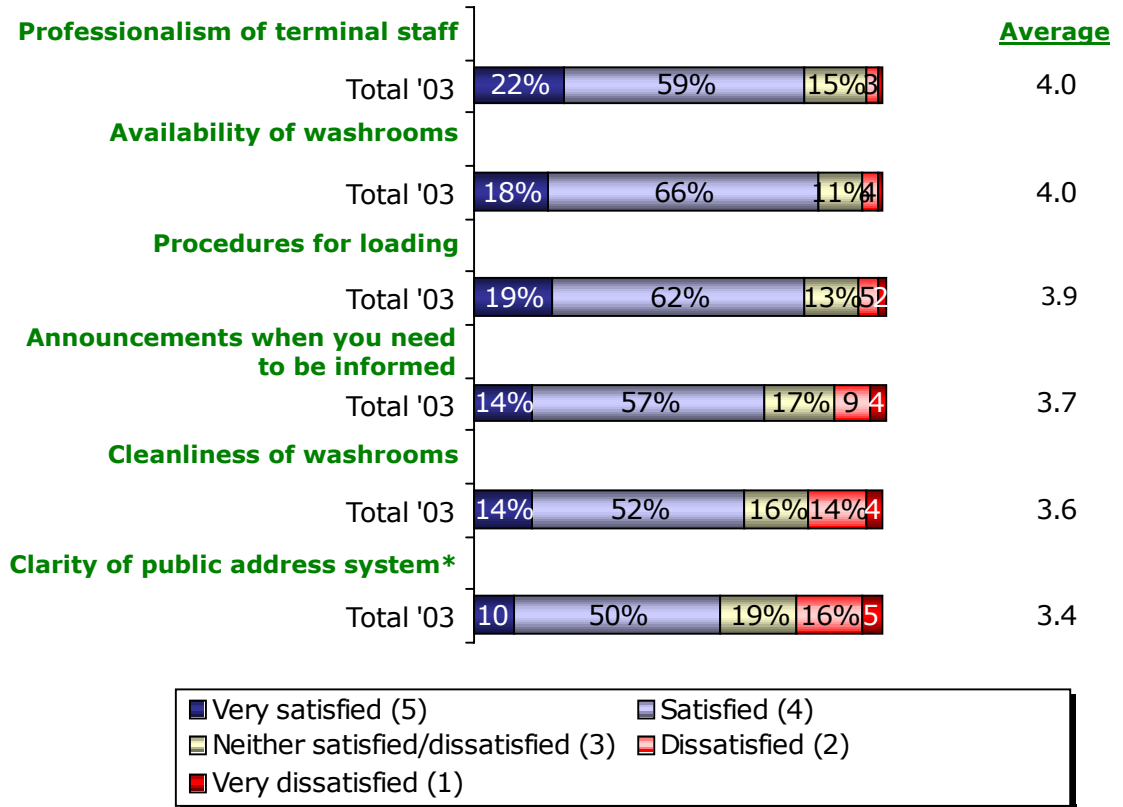
Q.3) Please rate how satisfied or dissatisfied you were with each of the following.

37% are foot passengers (including bus).  
 \* Excludes Route 23.

**Other Terminal Services**

- Satisfaction levels with other terminal services have been generally quite high, with passengers most positive about the *professionalism of terminal staff*, *procedures for loading*, and *availability of washrooms* at the terminal.
- Satisfaction levels are slightly lower with respect to *cleanliness of washrooms*, and with *announcements when you need to be informed*. The *clarity of the public address system* receives the most criticism of all these terminal services.

**Satisfaction with Other Terminal Services**



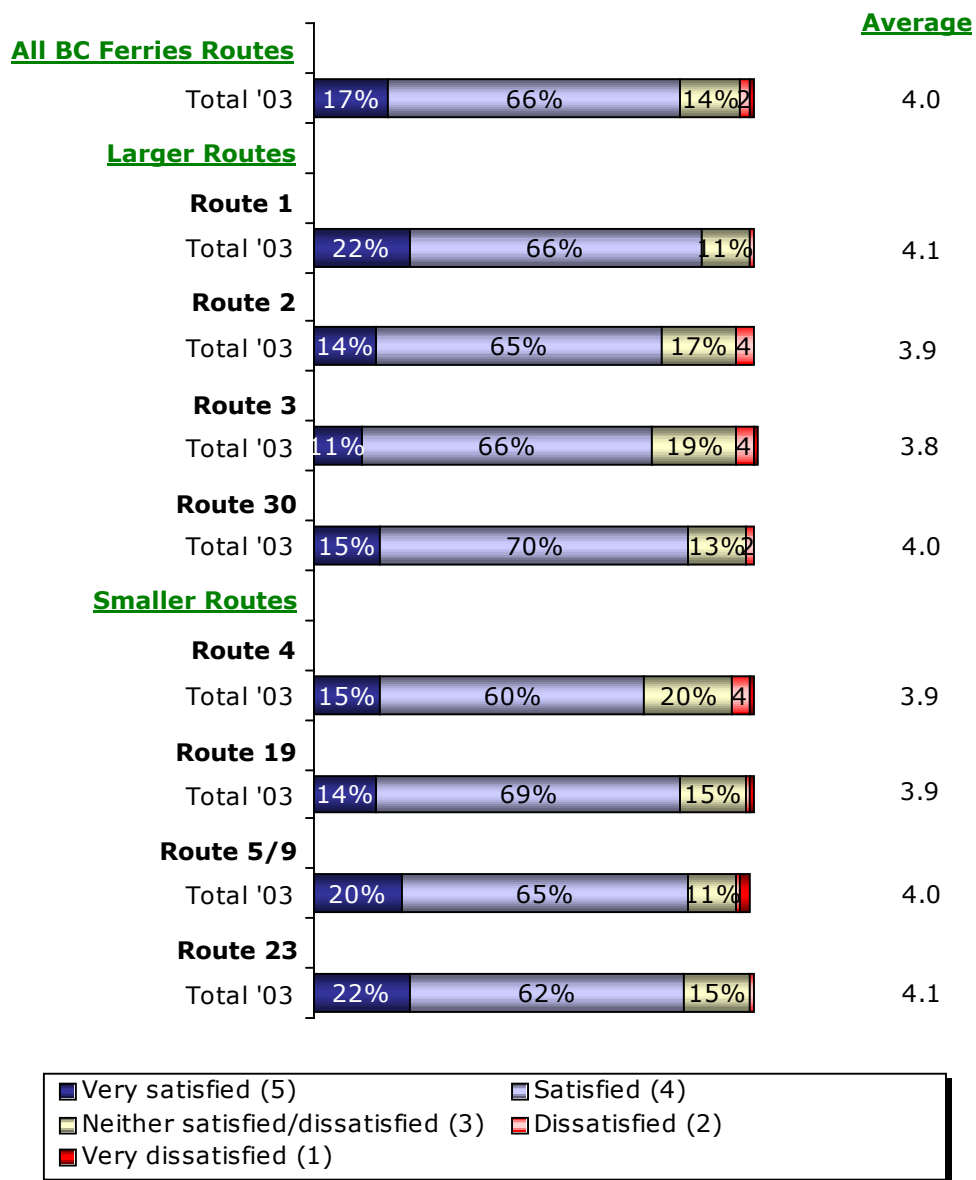
Q.3) Please rate how satisfied or dissatisfied you were with each of the following. \*Excludes Route 23.

## Onboard Experience

### Overall Onboard Experience

- A total of 83% of passengers were satisfied with their overall experience onboard. Scores are very similar across all routes, varying only slightly, between 3.8 and 4.1 out of 5, with highest satisfaction on Route 1 between Tsawwassen and Swartz Bay and on Route 23 between Campbell River and Quadra Island. [NOTE: Refer to page 6 or page 27 for Route number codes]

### Overall Satisfaction with Onboard Experience

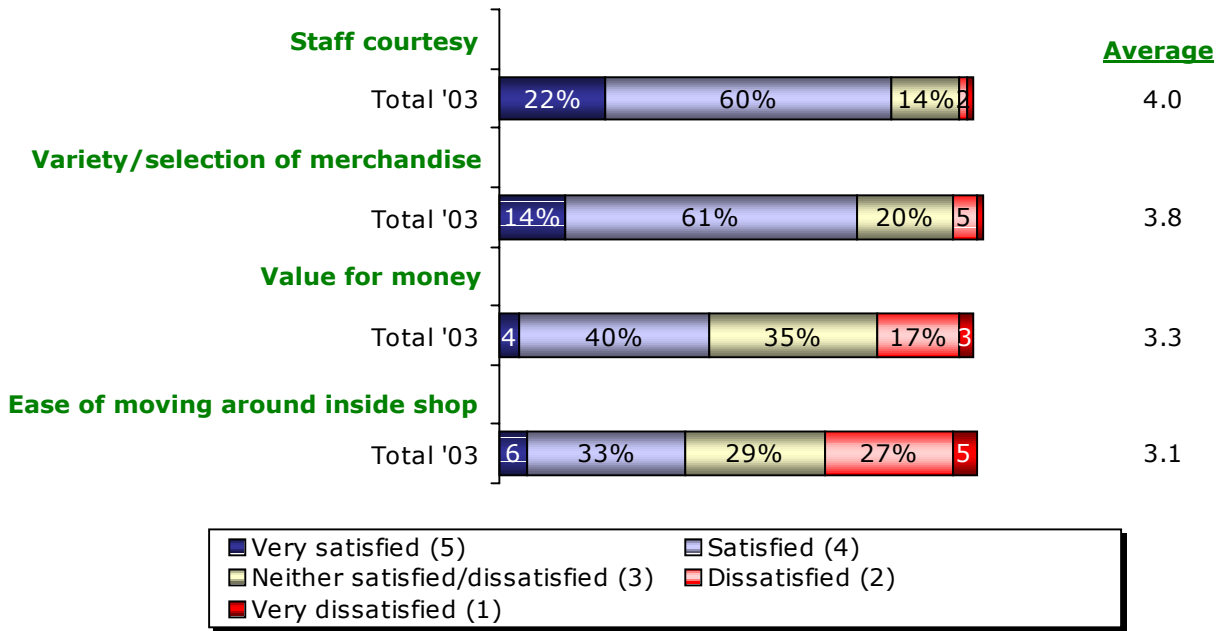


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Onboard Gift Shop/News Stand**

- Satisfaction levels are relatively high with the *staff courtesy* and *variety/selection of merchandise* in the gift shop/news stand. But ratings are low for *ease of moving around inside the shop* and *value for money*.

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



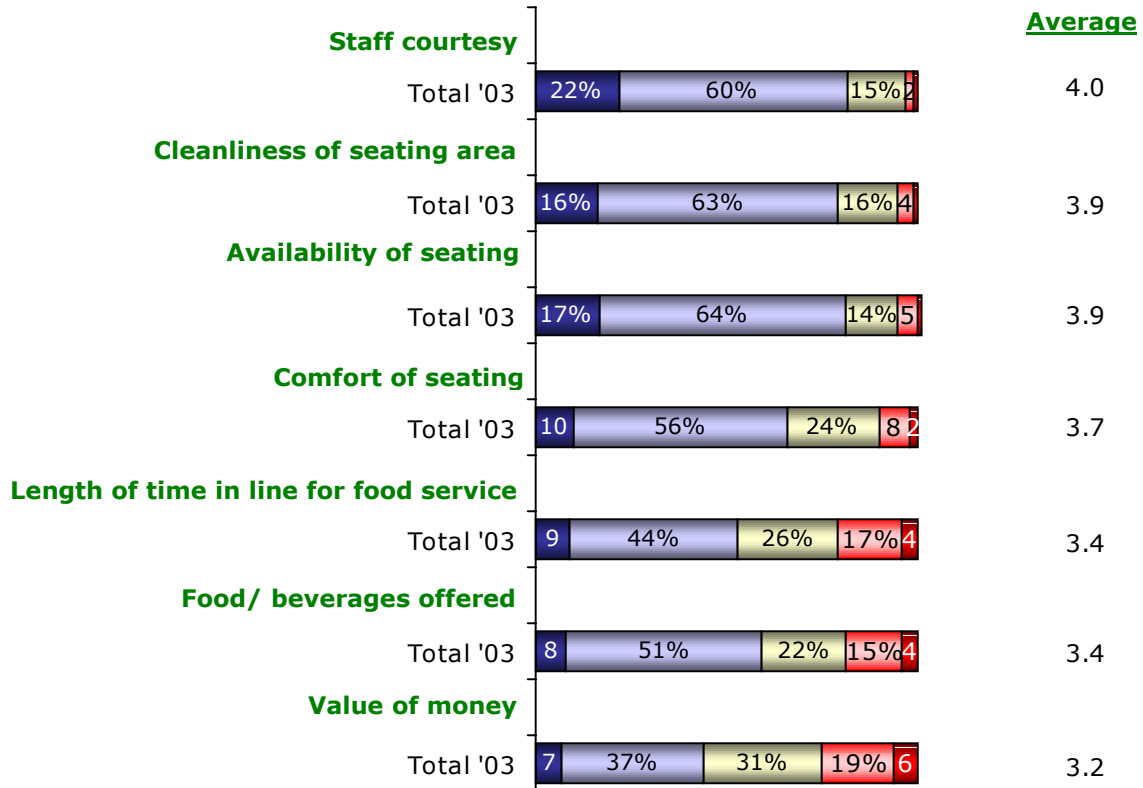
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

\* Excludes Routes 4, 19 and 23. Otherwise usage is 54%.

**Onboard Food Services**

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

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



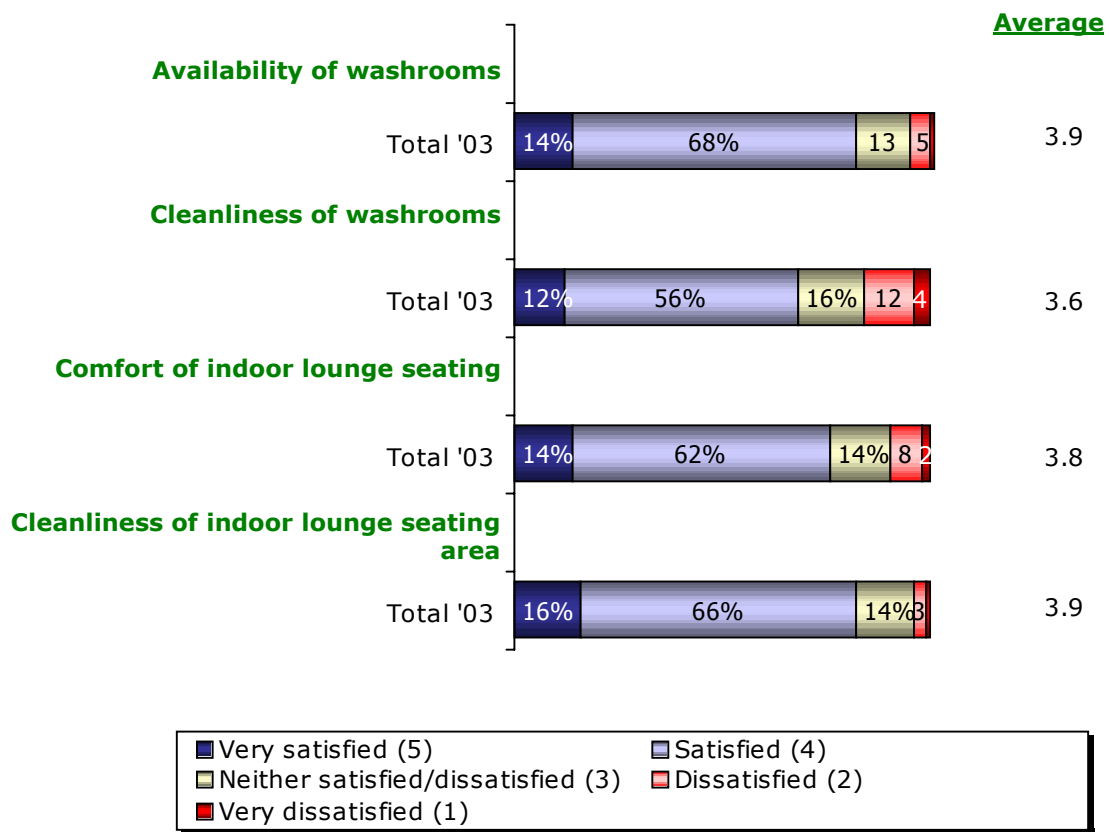
Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

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

**Onboard Washrooms and Onboard Seating**

- Passengers are relatively satisfied with the *availability of washrooms* but more critical of the *cleanliness* on most vessels.
- Passengers are also satisfied with the *comfort* and *cleanliness* of indoor lounge seating. Further analysis, however, shows that passengers are critical of seating comfort on the Quinsam, Skeena Queen and Mayne Queen.

**Satisfaction with Onboard Washrooms and Onboard Seating**

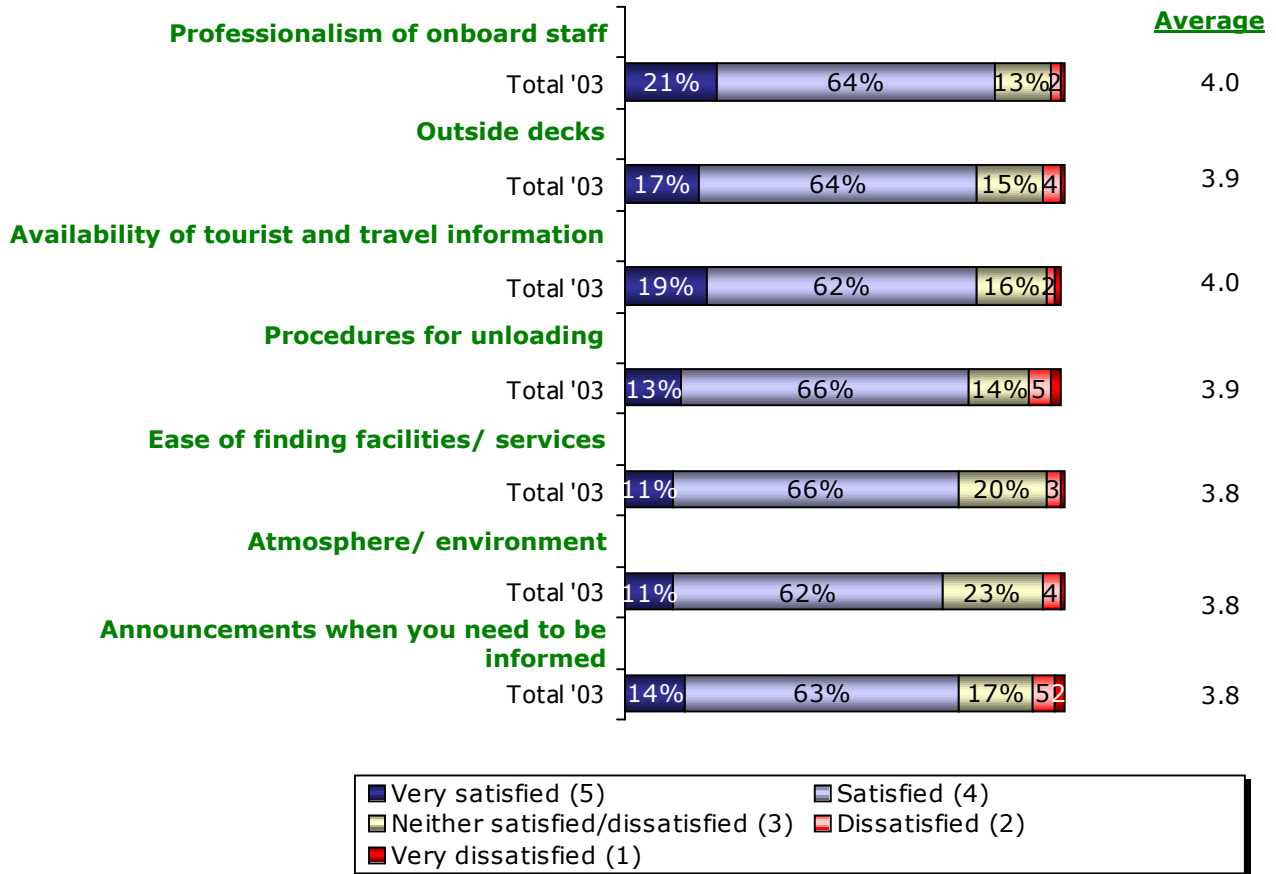


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.

**Other Onboard Facilities/Services**

- In terms of other onboard facilities and services, satisfaction levels have been satisfactory overall, with passengers most complimentary of the *professionalism of onboard staff*, and least satisfied with the *video arcade and ease of access for people with disabilities* (see graph continuing on next page).

**Satisfaction with Other Facilities/Services Onboard**

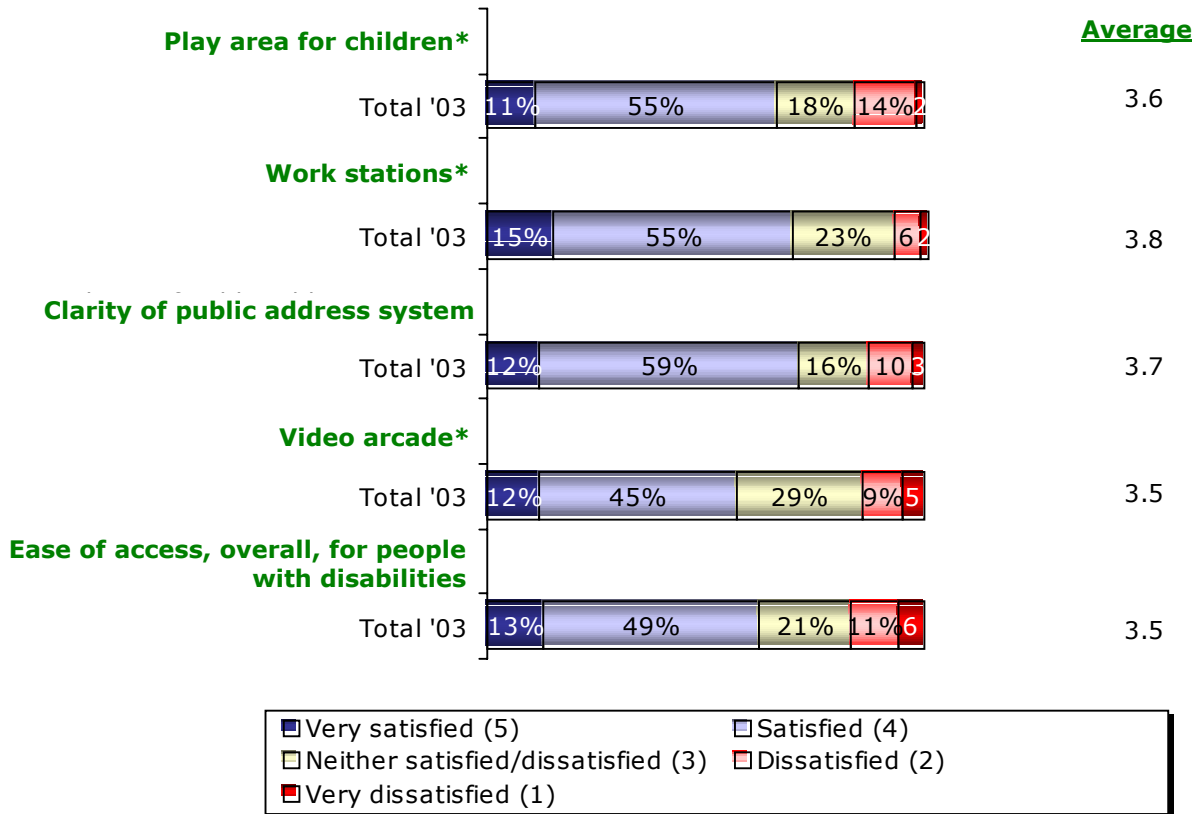


Q.4) Please rate how satisfied or dissatisfied you were with each of the following.



**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.

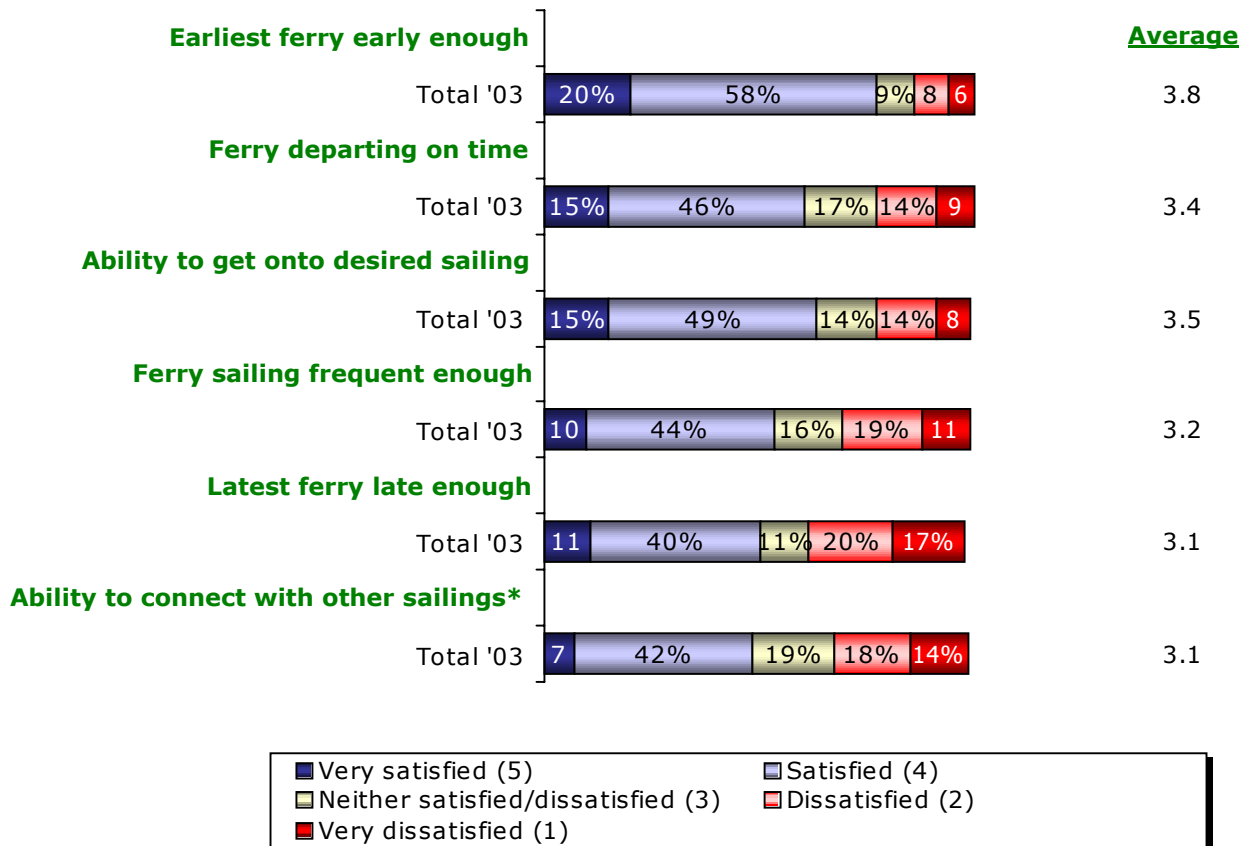
## Sailing Schedules

### Various Aspects of Sailing Schedules

Many aspects of the sailing schedule are not meeting passenger requirements. Key differences by route include the following: [NOTE: Refer to page 6 or page 27 for Route number codes.]

- *On-time departures:* The Tsawwassen-Swartz Bay route (Route 1) and most minor routes have the highest ratings. Route 2 between Horseshoe Bay and Nanaimo and Route 5/9 to various Southern Gulf Islands have the lowest ratings.
- *Ability to get onto desired sailing:* Route 2, 3 and 19 passengers seem to have most difficulty.
- *Sailing frequency:* Passengers on Route 3 report the greatest dissatisfaction.
- *Ability to connect:* Route 1 has the highest rating, Routes 3, 4 and 19 the lowest.
- *Latest ferry late enough:* Routes 3 and 4 record the lowest ratings.

### Satisfaction with Sailing Schedules

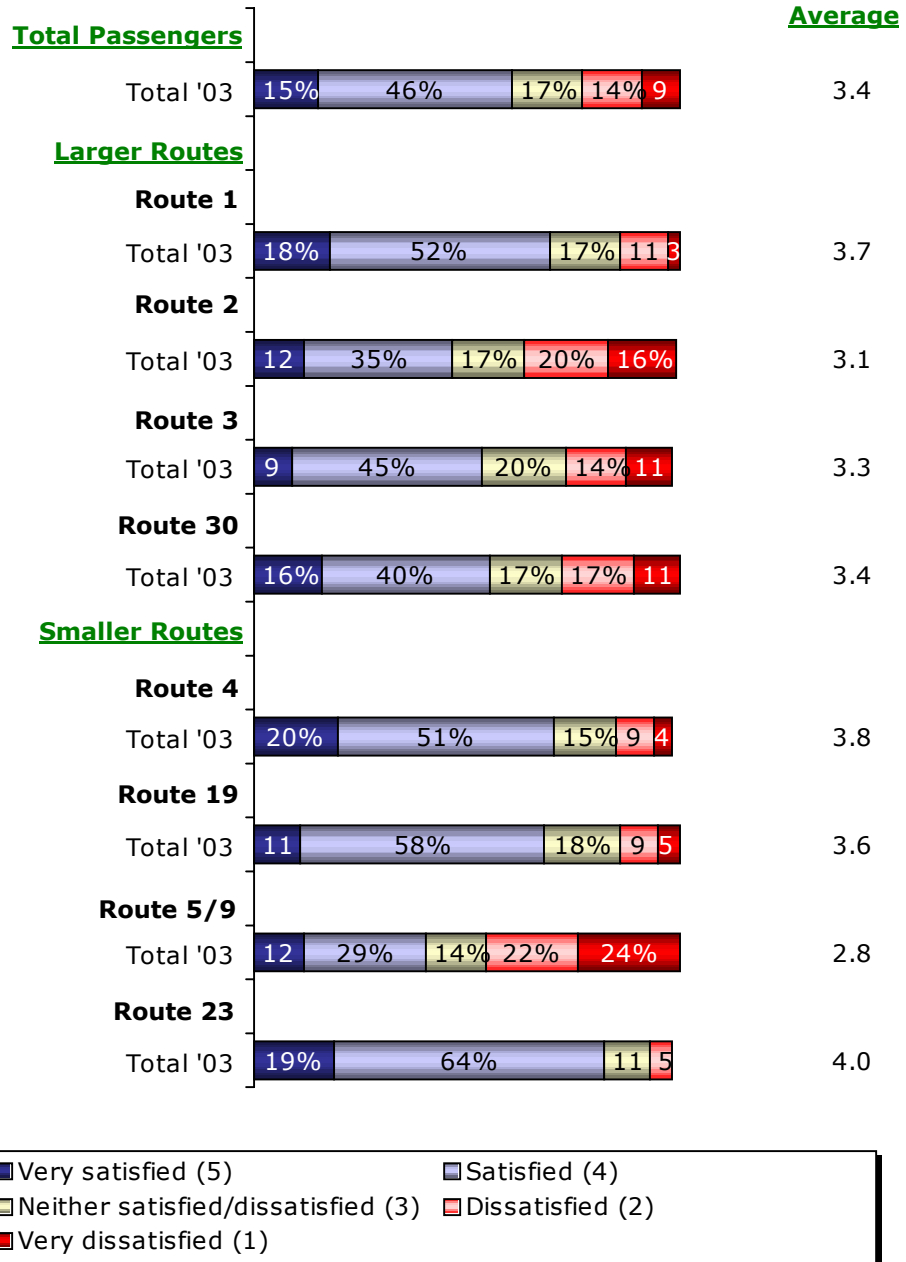


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

**Departing on Time**

- The following graph details the ratings for *departing on time* by route.  
 [NOTE: Refer to page 6 or page 27 for Route number codes]

**Satisfaction with "Departing on Time"**

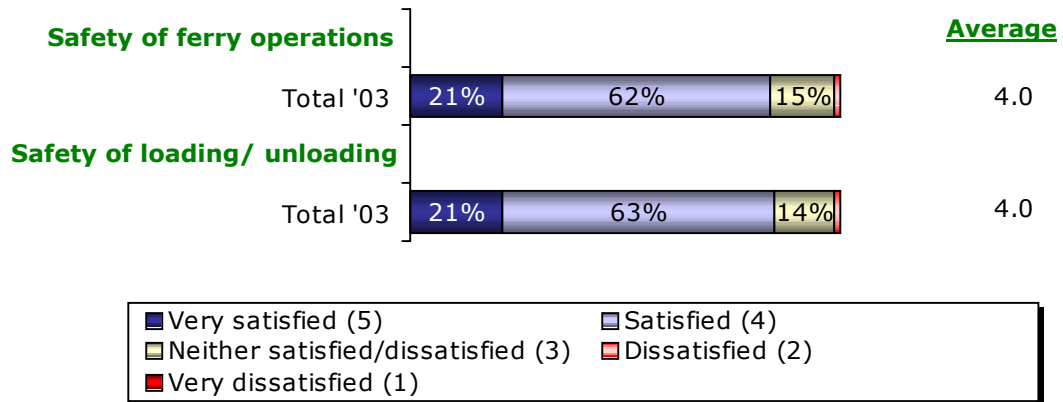


Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

## Safety

- Perceptions of the *safety of the ferry operations* are very strong overall, and on each route. This appears to be one of the main strengths of the service provided by BC Ferries.

### Satisfaction with Aspects of Safety of Ferry Operations



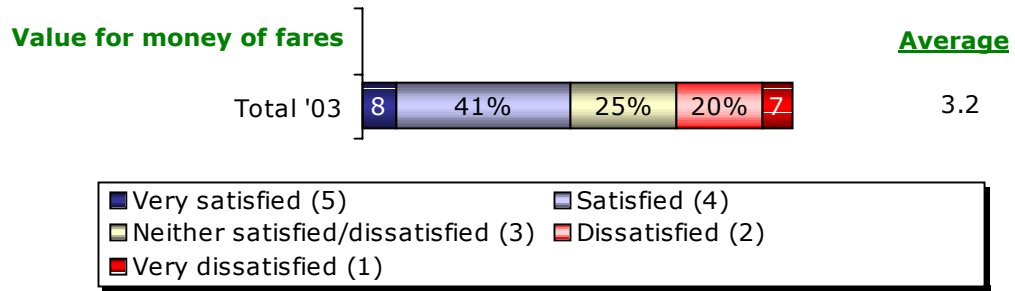
Q.5) Please rate how satisfied or dissatisfied you were with each of the following.

## Overall Value

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- Satisfaction levels are low with perceived value for money of the fares. As a rule, frequent travellers and those unable to get on the sailing they arrived for are most critical. Further analysis shows that passengers on the smaller routes, older passengers, tourists and Gulf Island residents are most positive about the value they receive.

### Satisfaction with Overall Value



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

# Appendix

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

<b>Ferry Routes Included in Customer Satisfaction Survey - 2003</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, Saltspring 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</b> (see page 27 for Route Number codes)											
	<b>Total</b>	<b>Major Routes</b>			<b>Route 3</b>	<b>Minor 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	4.0	4.0	4.2	3.8	3.9	3.7	4.0	4.1	4.1	3.9	4.1
<b>BEFORE ARRIVING AT TERMINAL</b>											
Usefulness of BC Ferries website	4.2	4.3	4.3	4.3	4.2	4.2	4.2	4.2	4.3	4.3	4.2
Ease of using on-line reservations	4.1	4.1	4.1	4.2	4.1	3.8	4.0	3.9	4.0	4.1	4.0
Usefulness of BC Ferries phone service	3.5	3.6	3.6	3.5	3.6	3.2	3.7	3.9	3.4	3.6	3.7
Ease of using automated phone service	3.2	3.4	3.4	3.3	3.3	2.8	3.2	3.5	3.0	3.2	2.8
Highway signage	3.9	4.0	4.0	3.8	4.0	3.6	3.8	3.9	3.7	3.9	3.6
<b>TERMINAL EXPERIENCE</b>											
Terminal overall	3.9	3.9	4.0	3.8	3.9	3.7	3.9	4.0	3.9	3.9	4.0
<b>Ticket Purchase</b>											
Efficiency of the transaction	4.3	4.4	4.4	4.3	4.4	4.2	4.4	4.4	4.4	4.4	4.4
Staff courtesy	4.3	4.4	4.4	4.3	4.4	4.1	4.5	4.4	4.5	4.5	4.5
Clarity of staff directions	4.2	4.3	4.3	4.2	4.3	4.0	4.3	4.3	4.4	4.3	4.4
<b>Food &amp; Beverage Services at the Terminal</b>											
Food beverages offered	3.1	3.2	3.3	3.1	3.1	2.8	3.1	3.1	-	3.2	-
Value for money	2.9	3.0	3.0	2.8	2.9	2.8	2.9	2.8	-	3.0	-
<b>Gift Shop/News Stand at the Terminal</b>											
Variety/selection of merchandise	3.4	3.5	3.6	3.4	3.2	3.2	3.2	3.2	-	3.1	-
Value for money	3.2	3.3	3.4	3.1	3.2	3.0	3.1	3.2	-	3.0	-
<b>Outdoor Market Area at the Terminal</b>											
Variety/selection of merchandise	3.3	3.3	3.4	3.3	3.2	3.1	3.6	3.6	-	3.5	-
Value for money	3.3	3.2	3.2	3.2	3.2	3.2	3.4	3.6	-	3.3	-
<b>Other Terminal Services</b>											
Clarity of Public address system	3.4	3.5	3.6	3.4	3.6	3.3	3.2	3.1	3.0	3.4	-
Announcements when you need to be informed	3.7	3.8	3.9	3.6	3.8	3.4	3.5	3.4	3.3	3.6	3.7
Availability of washrooms	4.0	4.0	4.1	3.9	4.0	3.8	3.9	4.1	3.8	4.0	4.0
Cleanliness of washrooms	3.6	3.6	3.6	3.5	3.8	3.4	3.7	3.9	3.4	3.8	3.7
Procedures for loading	3.9	4.0	4.1	3.8	4.0	3.7	3.9	4.0	4.0	3.7	4.1
Professionalism of terminal staff	4.0	4.0	4.0	3.9	4.0	3.8	4.1	4.0	4.2	4.0	4.2

continued

<b>Average Satisfaction Ratings by Route (cont'd)</b> (see page 27 for Route Number codes)												
	<b>Total</b>	<b>Major Routes</b>					<b>Route 3</b>	<b>Minor 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>												
Availability of parking spaces	3.5	3.6	3.7	3.4	3.9	3.6	3.0	2.7	2.7	3.7	-	
Parking value for money	2.8	2.8	2.9	2.5	3.0	2.8	2.9	2.5	3.0	2.8	-	
Ease of using passenger drop-off/ pick-up area	3.7	3.7	3.6	3.7	4.1	3.6	3.5	3.3	3.2	3.8	3.8	
Availability of seating in pre-boarding lounge at terminal	3.5	3.5	3.6	3.4	3.3	3.4	3.5	4.0	3.6	3.2	3.5	
Comfort of seating in pre-boarding lounge at terminal	3.3	3.3	3.4	3.1	3.3	3.1	3.2	3.6	3.1	3.2	3.1	
Cleanliness of pre-boarding lounge	3.8	3.8	3.9	3.7	3.6	3.7	3.7	4.0	3.8	3.7	3.5	
<b>ONBOARD EXPERIENCE</b>												
Onboard overall	4.0	4.0	4.1	3.9	4.0	3.8	4.0	3.9	3.9	4.0	4.1	
<b>Gift Shop/ News Stand</b>												
Variety/ selection of merchandise	3.8	3.8	3.9	3.8	3.7	3.8	3.6	-	-	3.6	-	
Staff courtesy	4.0	4.1	4.1	4.1	4.1	3.9	4.1	-	-	4.1	-	
Ease of moving around inside shop	3.1	3.1	3.1	3.1	3.0	3.0	3.2	-	-	3.2	-	
Value for money	3.3	3.3	3.3	3.2	3.3	3.2	3.3	-	-	3.3	-	
<b>Food Services</b>												
Length of time in line for food services	3.4	3.4	3.5	3.1	3.6	3.3	3.7	-	-	3.7	-	
Food/ beverages offered	3.4	3.5	3.5	3.4	3.4	3.3	3.3	-	-	3.3	-	
Staff courtesy	4.0	4.0	4.0	4.0	4.1	4.0	4.2	-	-	4.2	-	
Availability of seating	3.9	3.9	3.9	3.8	4.0	3.9	4.1	-	-	4.1	-	
Comfort of seating	3.7	3.7	3.7	3.7	3.5	3.6	3.6	-	-	3.6	-	
Cleanliness of seating area	3.9	3.9	3.9	3.9	3.9	3.9	4.1	-	-	4.1	-	
Value for money	3.2	3.2	3.3	3.1	3.1	3.1	3.3	-	-	3.3	-	
<b>Washrooms</b>												
Availability of washrooms	3.9	3.9	3.9	3.9	4.0	3.8	3.9	3.9	3.8	4.1	4.1	
Cleanliness of washrooms	3.6	3.6	3.7	3.5	3.7	3.6	3.6	3.7	3.3	3.9	3.7	
<b>Lounge Seating</b>												
Comfort of indoor lounge seating	3.8	3.9	4.0	3.7	3.7	3.8	3.3	2.9	3.0	3.6	3.8	
Cleanliness of indoor lounge seating area	3.9	4.0	4.0	3.9	3.9	3.9	3.8	3.7	3.5	4.1	3.9	

continued



<b>Average Satisfaction Ratings by Route (cont'd)</b> (see page 27 for Route Number codes)											
	<b>Total</b>	<b>Major Routes</b>				<b>Route 3</b>	<b>Minor 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	3.6	3.6	3.8	3.3	3.7	3.5	3.7	-	-	3.7	-
Video arcade	3.5	3.6	3.7	3.3	3.6	3.3	3.3	-	-	3.3	-
Work stations	3.8	3.8	4.0	3.7	3.4	3.5	3.8	-	-	3.8	-
Outside decks	3.9	4.0	4.1	3.9	3.9	3.8	3.8	3.6	3.6	4.0	4.0
Availability of tourist and travel information	4.0	4.0	4.0	4.0	4.1	3.9	3.8	3.8	3.5	3.9	3.8
Ease of access, overall, for people with disabilities	3.5	3.7	3.9	3.4	3.7	3.4	3.2	3.4	3.0	3.6	2.9
Ease of finding facilities/ services	3.8	3.9	3.9	3.8	3.9	3.8	3.7	3.7	3.6	3.9	3.8
Clarity of public address system	3.7	3.7	3.8	3.6	3.8	3.6	3.3	3.3	3.0	3.7	3.4
Announcements when you need to be informed	3.8	3.9	3.9	3.8	3.9	3.7	3.6	3.6	3.3	3.7	3.5
Atmosphere/ environment	3.8	3.8	3.9	3.7	3.8	3.7	3.7	3.5	3.6	3.8	3.8
Procedures for unloading	3.9	3.9	3.9	3.9	3.9	3.6	3.9	3.9	4.0	3.6	3.9
Professionalism with onboard staff	4.0	4.1	4.1	4.0	4.1	3.9	4.1	4.0	4.2	4.0	4.1
<b>Experience with the Sailing Schedule</b>											
Earliest ferry earliest enough	3.8	3.7	3.7	3.7	3.9	3.8	4.0	3.9	4.1	3.8	4.0
Latest ferry late enough	3.1	3.2	3.2	3.0	3.5	2.6	3.3	2.7	3.3	3.4	3.6
Ferry sailing frequent enough	3.2	3.4	3.6	3.1	3.2	2.6	3.5	3.4	3.7	3.2	3.7
Ability to get onto desired ferry	3.5	3.6	3.7	3.3	3.6	3.1	3.6	3.7	3.3	3.8	3.4
Ability to connect with other sailings	3.1	3.3	3.5	3.1	3.3	2.7	3.0	2.7	2.7	3.3	3.6
Ferry departing on time	3.4	3.5	3.7	3.1	3.4	3.3	3.5	3.8	3.6	2.8	4.0
<b>Safety</b>											
Safety of ferry operations	4.0	4.1	4.1	4.0	4.1	3.9	4.1	4.1	4.0	4.1	4.1
Safety of loading/unloading	4.0	4.1	4.1	4.0	4.1	3.9	4.1	4.2	4.1	4.1	4.1
<b>OVERALL VALUE</b>											
Value for money of fares	3.2	3.2	3.3	3.1	3.2	3.2	3.4	3.3	3.5	3.6	3.2

<b>TERMINAL ATTRIBUTES ONLY - Satisfaction Ratings by Terminal</b>							
	<u>Total</u>	<u>Tsawwassen</u>	<u>Swartz Bay</u>	<u>Horseshoe Bay</u>	<u>Departure Bay</u>	<u>Langdale</u>	<u>Duke Point</u>
<b>OVERALL EXPERIENCE</b>							
Overall	4.0	4.1	4.2	3.8	3.8	3.7	3.9
<b>TERMINAL EXPERIENCE</b>							
Terminal overall	3.9	3.9	4.1	3.7	3.8	3.7	3.8
<b>Ticket Purchase</b>							
Efficiency of the transaction	4.3	4.4	4.4	4.2	4.4	4.2	4.4
Staff courtesy	4.3	4.4	4.4	4.2	4.4	4.1	4.4
Clarity of staff directions	4.2	4.3	4.3	4.1	4.2	4.0	4.3
<b>Food &amp; Beverage Services at the Terminal</b>							
Food beverages offered	3.1	3.2	3.4	3.0	3.2	2.6	2.7
Value for money	2.9	3.0	3.1	2.9	2.8	2.7	2.8
<b>Gift Shop/News Stand at the Terminal</b>							
Variety/selection of merchandise	3.4	3.6	3.7	3.3	3.6	3.1	2.9
Value for money	3.2	3.3	3.4	3.1	3.2	3.0	3.0
<b>Outdoor Market Area at the Terminal</b>							
Variety/selection of merchandise	3.3	3.3	3.5	3.2	3.4	3.0	3.0
Value for money	3.3	3.1	3.4	3.2	3.3	3.1	3.2
<b>Other Terminal Services</b>							
Clarity of Public address system	3.4	3.6	3.6	3.3	3.5	3.3	3.5
Announcements when you need to be informed	3.7	3.9	3.9	3.5	3.7	3.5	3.7
Availability of washrooms	4.0	4.0	4.1	3.9	3.9	3.8	4.1
Cleanliness of washrooms	3.6	3.6	3.7	3.5	3.6	3.5	4.0
Procedures for loading	3.9	4.0	4.1	3.7	3.9	3.7	4.1
Professionalism of terminal staff	4.0	4.0	4.1	3.9	4.0	3.8	4.1
<b>Foot Passenger Services at the Terminal</b>							
Availability of parking spaces	3.5	3.6	3.7	3.3	3.4	3.9	4.2
Parking value for money	2.8	3.0	2.9	2.4	2.5	3.1	3.2
Ease of using passenger drop-off/ pick-up area	3.7	3.6	3.6	3.5	3.9	3.8	4.2
Availability of seating in pre-boarding lounge at terminal	3.5	3.4	3.9	3.5	3.4	3.2	3.8
Comfort of seating in pre-boarding lounge at terminal	3.3	3.2	3.7	3.1	3.2	3.0	3.7
Cleanliness of pre-boarding lounge	3.8	3.7	4.0	3.8	3.6	3.7	3.9
<b>Overall Value</b>							
Value for money of fares	3.2	3.3	3.2	3.2	3.1	3.1	3.1

## 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. While the primary purpose of the research for this report is to satisfy contract obligations, this research will ultimately contribute to product and service enhancements for improved service for BC Ferries travellers. This study is part of a regular program of ongoing research conducted by BC Ferries.

### ***Project Overview***

The 2003 Customer Satisfaction Tracking Study will act as a baseline for the newly formed British Columbia Ferry Services Inc. and will track performance on satisfaction levels overall and with specific service attributes. Once a year, the annual satisfaction scores will be published on the BC Ferries website as required by the Coastal Ferry Services Contract.

### ***Research Objectives***

The specific objectives are as follows; to:

- Determine customers satisfaction levels with BC Ferries service, overall,
- Determine satisfaction with the specific attributes of the service that span the entire range of points of customer contact with BC Ferries - including before arriving at the terminal, at the terminal, onboard the vessel, loading/unloading, overall safety and value for money of fares paid,
- Track changes in satisfaction over time, and to
- Ensure 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 2003 are as follows:

	<b>Screeners</b>	<b>Returns</b>
<b>Larger Routes:</b>	6,576	2,149
Route 1: Tsawwassen-Swartz Bay	1,854	620
Route 2: Horseshoe Bay-Departure bay	1,970	602
Route 3: Horseshoe Bay-Langdale	1,338	461
Route 30: Tsawwassen-Duke Point	1,414	466
<b>Smaller Routes:</b>	4,963	1,477
Route 4: Swartz Bay-Fulford Harbour, Saltspring Island	1,280	356
Route 19: Departure Bay-Descanso Bay, Gabriola Island	1,325	360
Route 5/9: Southern Gulf Islands	1,168	403
Route 23: Campbell River-Quadra Island	1,190	358
<b>TOTAL</b>	<b>11,539</b>	<b>3,626</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
- by known BC Ferries traffic volume by wave

The weighting procedures have been professionally scrutinized and approved by a professional statistician specializing in transportation research. The table following outlines the actual and weighted distributions of the sample.

<b>Actual &amp; Weighted Distribution of the Sample -2003 -</b>				
	<b>Screeners</b>		<b>Returns</b>	
	<u>Actual</u> (11,539) %	<u>Weighted</u> (11,539) %	<u>Actual</u> (3,626) %	<u>Weighted</u> (3,626) %
<b>Larger Routes</b>	<b>57</b>	<b>83</b>	<b>59</b>	<b>84</b>
Weekend	18	28	19	29
30	4	3	4	3
3	3	5	4	6
2	5	7	5	6
1	6	13	6	13
Weekday	40	55	40	56
30	9	6	9	5
3	9	11	9	11
2	12	15	12	15
1	10	24	11	25
<b>Smaller Routes</b>	<b>43</b>	<b>17</b>	<b>41</b>	<b>16</b>
Weekend	14	5	11	4
19	3	1	2	1
4	3	1	3	1
5/9	3	1	3	1
23	4	1	4	1
Weekday	29	12	29	12
19	8	4	8	3
4	8	3	7	3
5/9	7	3	9	4
23	6	3	6	3

## **Data Collection**

The interviewers for were personal intercept staff who have completed rigorous training and are experienced with general public studies. A briefing of interviewers 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, as was physically and practically possible:

- 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 decks; 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 often first on and usually the last to leave the main onboard passenger decks), some interviews (the short 'screeners') were conducted on parking decks with vehicle passengers after the announcement they could return to their vehicle.
- Interviewers were instructed not to accommodate customers requesting a survey; however, if individuals were persistent, a specially marked copy was provided which allowed for its later removal from the total sample.

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

## **Data Analysis**

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

### **Response Rates**

The following outlines the response rates achieved in the 2003 tracking program.

<b>Response Rates</b>	
<b>Larger Routes</b>	<b>Total '03</b>
Route 1	33%
Route 2	31%
Route 3	34%
Route 30	33%
<b>Smaller Routes</b>	
Route 4	28%
Route 19	27%
Route 5/9	35%
Route 23	30%
<b>Overall Response Rate</b>	<b>31%</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 –2003</b>		
	<b>Actual Sample Size</b>	<b>Approximate Tolerance Limits % Points</b>
Total Screeners	11,539	+/-0.9%
Total Returns	3,626	+/-1.6%
Total Larger Route Returns	2,149	+/-2.1%
Total Smaller Route Returns	1,147	+/-2.9%

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