



Jane Helleur & Associates Inc.



**PASSENGER AMENITIES FOR THE
FUTURE MARINE ATLANTIC FLEET**

FINAL REPORT

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And

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1.0 Introduction

Various stakeholders have raised issues regarding the experience of passengers who utilize the Marine Atlantic ferries to access the province, particularly the experiences of tourists during the summer months.

Hospitality Newfoundland and Labrador (HNL) has been responding to issues regarding the quality of Marine Atlantic services for many years. Based on feedback from their members, tourists and other stakeholders, HNL is concerned that current ferry services do not provide a good experience for travelling passengers. Issues that arise include poor scheduling, schedule delays, the lack of cabin and berth accommodations, poor cabin/berth quality, poor food quality, poor availability of on-board assistance from crew, lack of information services and the absence or poor quality of passenger amenities.

To respond to these issues with more clarity, HNL commissioned this study to identify the specific on-board services/amenities currently available on Marine Atlantic crossings, to assess the extent to which these services/amenities are meeting passenger requirements/expectations and to identify what changes and/or additional passenger amenities should be considered for the next generation of Marine Atlantic ferry vessels.

2.0 Research Methodologies

In support of this project the following tasks were undertaken:

- A literature review;
- Interviews with industry stakeholders;
- On-board passenger surveys; and
- A comparative review of ferries currently in use in other jurisdictions.

These are outlined briefly below and the detailed results are provided in the subsequent sections.

2.1 Literature Review

There is very little definitive information that addresses the quality of amenities on Marine Atlantic vessels. There is antidotal information in some tourism reports, but this is limited. For example, *A Special Place, A Special People* (Economic Planning Group, 2004) indicated that the then ferry services were “...a weak point in the provincial tourism infrastructure in terms of costs, low standards of customer services, schedules and capacity during

the peak summer season".¹ This assessment was based on research undertaken at that time and the results of 1997 exit surveys undertaken by the province. Concerns that Marine Atlantic viewed itself as being a transportation provider primarily, as opposed to part of the provincial tourism infrastructure, were also identified. There was also data available through Marine Atlantic by way of their annual customer satisfaction surveys as presented in their annual reports. This data demonstrated positive customer feedback, but the methodology for data collection was not confirmed.

The consultants do not feel it is appropriate to place too much emphasis on historic data regarding customer satisfaction on Marine Atlantic crossings. Improvements and changes to Marine Atlantic services are ongoing and it was felt that the results of this project should stand alone in reflecting direct and current information regarding passenger satisfaction levels.

2.2 Key Informant Interviews

Key informant interviews were undertaken with a number of key stakeholders who could speak to the issue of passenger amenities on the Port aux Basques-North Sydney and the Argentia-North Sydney ferry crossings, including government and industry officials and tourism operators.

Interviews were qualitative in nature and focused on the various amenities (accommodations, food and beverage, entertainment, technology and other services including personal hygiene) available on the two ferry crossings and the quality of these services.

In total, 23 full interviews were undertaken including the following:

- 7 industry representatives (e.g. Association of Seafood Producers, Independent Trucker's Assoc. – refer to Appendix A);
- 2 government representatives;
- 13 tourism operators; and
- 1 naval architect.

Three additional front line staff with the tour operator "Ambassadors" responded to a limited number of interview questions, bringing the total sample for front line tourism operators to 16. As this is a relatively limited sample of provincial tours operators, the consultants caution that a more comprehensive consultation process with frontline tourism workers may demonstrate more conclusive results.

¹ *A Special Place, A Special People* (Economic Planning Group, 2004). P57.

The results of these consultations are outlined in Section 3.0 below. It is noted that there were no substantial differences in the nature of the comments provided by the different informant groups. A listing of all interviewees and interview protocols is provided in Appendix A.

2.3 On Board Passenger Surveys

Passenger surveys were undertaken during the week of July 7 – July 12, 2008 on round trips of the Argentia-North Sydney route, travelling on the *MV Clara and Joseph Smallwood* and the Post aux Basques-North Sydney route, travelling on the *MV Caribou*. These vessels are “sister” ships and are comparable in their amenities and services. Weather conditions for both sailings were excellent. The Argentia ferry was 2 1/2 hours late leaving North Sydney but all other crossings were on time.

A total of 119 surveys were completed for the Argentia-North Sydney round trip and 39 of these were completed by parties of 2 more, implicitly increasing the real sample size. On the Post aux Basques-Sydney service 77 surveys were completed on the round trip with 22 surveys being completed by parties of 2 or more.

With regards to the statistical reliability of these surveys, a number of 300 completed surveys normally provide a high level of reliability. However, when collecting data to indicate directional assessment (E.g. a scale of 1-5), it is acceptable to undertake fewer surveys/samples and, in such circumstances, 100-200 completes can be undertaken without being too concerned with statistical validity.

A copy of the passenger survey is provided in Appendix B and the results are discussed in Section 4 below.

2.4 Jurisdictional Comparison: Ferry Services

As part of this review, ferry services provided in other jurisdictions and their level of on-board amenities were reviewed. The selection of ferry services was intended to include international and Canadian services with a focus on routes that were of similar distance and duration as the Newfoundland routes. Five ferry routes were considered:

- two routes in British Columbia and operated by BC Ferries;
- the CAT service for Yarmouth-Portland Main;
- the Prince Edward Island service to Magdalene Islands; and
- the Poole to Cherboough service.

3.0 Results of Key Informants Interviews

3.1 Tourism Operators

As noted, 13 tourism operators, including a primary mainland tourism operator who conducts annual tours to the province, were interviewed; another 3 front line staff also responded to the interview questions (see Appendix A) for a total of 16 interviewees.

Of the 13 operators surveyed, 8 indicated that they hear very little from their clients and that, for the most part, the ferry services seems to be meeting passenger needs. Five respondents indicated that the ferry services do not meet client needs and are having an adverse impact on the tourism industry; two of these respondents were very strong in their comments regarding the poor quality of Marine Atlantic services. In terms of how Marine Atlantic ferries compare with those in other jurisdictions, 8 respondents indicated that they thought them to be worse.

The issues of most concern to operators and which they feel have a negative impact on the provincial tourism industry included:

- Insufficient availability of sleeping accommodations;
- Poor scheduling and schedule interruptions due to mechanical failures or other reasons;
- Fees being too high, especially with the fuel surtax; and
- Food quality and speed of food service.

Table I below provides a summary of the responses from tourism operators.

TABLE I: Results of Interviews with Tourism Operators			
Survey Question	Response	#	Comments
Do/have many of your clients utilize (d) either of the 2 Marine Atlantic ferries in accessing the province? (16)	Yes No	16 0	All operators have clients who use the ferry and some are highly dependent on ferry travel, notably those who provide accommodation.
Based on your knowledge, is the current level of amenities provided on the designated ferry crossings meeting passenger needs and expectations? (13)	Yes No Sometimes	6 5 2	The majority of operators indicated they hear few complaints from clients.

Based on your knowledge, how do the noted Marine Atlantic ferries and their on-board amenities compare with ferries that service like routes elsewhere in Canada and/or Europe? Please explain. (13)	Same	2	Feedback was mixed with very little conclusive evidence/knowledge offered by operators.
	Worse	7	
	Don't Know	4	
What on-board amenities and other service issues are priorities and need to be incorporated into the design of future ferries servicing the province? (16)	More cabins/sleeping Capacity	10	-Comfortable cabins. Should include 2 berth cabins; more privacy on berths; alternative sleepers/cots; -Needs to be better sleeping options for bus drivers especially while waiting to board at terminal
	Food quality	8	-Better quality; more choices; more reasonable pricing (too expensive for quality); faster moving service
	Better schedules	8	-Leaving too early; arriving too late
	Seating	7	-Better more comfortable seating; all reclining
	Fees	6	-Fees too high
	Fewer delays	6	-Associated with mechanical delays
	Reservation system	3	-Needs to be improved, notably Internet site
	On-board information	3	-Needs to be improved with tourism and operator brochures and assistance
	Entertainment	3	-Finishes too early; not long enough
	Formal Dining	2	-Make available
	Honesty	2	B-e honest with passengers regarding delays, cancellations, etc.
	Escalators from car decks	2	-Or elevators
	Quiet area	2	Away from entertainment and TV's
	Cleanliness	3	-Needs to be cleaner especially washrooms
	Internet access	2	-Should be free
	Misc: All with single rating:		
-Better viewing of TV			
-Personal Pay TV			
-Better availability of staff			
-Blankets for colder crossings			
-Need to improve animal kennels – people are concerned that they are not clean and their pets could pick up a disease			

Do you feel that current level of service available on Marine Atlantic affects the provincial tourism industry? Please explain (13)	Yes	8	-Ferry deters travel -It's a "cattle cart"
	No	2	
	Don't Know	3	
	Reasons: -Scheduling and delays	5	
	-Price and fuel surcharge	4	
	-Capacity	2	
Do you have any further Comments?	None	0	

3.2 Industry and Government Representatives

Responses from key informants representing government and industry were mixed. A limited number of informants indicated they have heard few complaints regarding Marine Atlantic services. However, two issues were raised with consistency:

- Increases in fees, notably fuel surcharges; and
- Cancellations and delays due to mechanical and other issues.

Other issues also raised consistently by industry respondents were:

- The lack of cabins and other comfortable sleeping facilities. Suggested that options need to be explored for increasing the availability of cabins or sleeping berths during the summer tourism season, be it with temporary modules or other innovative options;
- The poor quality of food selection along with high prices;
- The absence of staff to assist with passenger needs;
- Availability of an information center with tourism information; and
- Long lineups.

It is noted that for all key informant interviews, many respondents expressed frustration that they were being asked to identify issues regarding the quality of ferry services noting that many of these issues are historic and are routinely raised with no real improvements.

4.0 Passengers Survey Results

The detailed results of the passenger surveys are provided in Appendix B. In the case of both surveys the following observations are provided:

- The majority of travelers (54-60%) have used the ferry before with 40-46% being first time users;
- The majority of travelers on the Argentia run (78%) will use the ferry no more than once per year compared to 56.5% for the Port aux Basques link;
- Between 84-90% of travelers on both crossings were travelling for recreational or vacation purposes; and
- Most people travel in parties of two with approximately 70% of travelers in parties of 2-4 people.

Of particular interest for the survey results is the rating travelers provided for specific amenities offered on board the ferries. Ratings on the survey questionnaire were between 1-7, with one indicating the lowest level of satisfaction (completely dissatisfied) and 7 indicating the highest level of satisfaction (completely satisfied). Based on the responses, average ratings were developed for each indicator.

Final average indicators for each ferry crossing are listed in Table 2 below, which also provides for a comparative analysis of average rating for each indicator on both ferry crossings.

Indicator	Port aux Basques- North Sydney	Argentia – North Sydney
Reservations call service	6.04	5.71
Internet based reservations	4.44	4.88
Sailing Schedule	5.85	5.16
Boarding wait times	5.93	5.32
On board tourism & other information	5.63	5.83
Staff availability for questions or help	6.06	6.25
Places to eat	5.64	5.18
Quality of food	5.52	5.31
Availability of seating	6.33	5.97
Quality of seating	6.01	5.89
Availability of cabins	3.46	3.14
Quality of cabins	5.27	6.00
Lounges	5.96	6.09

On Board entertainment	5.35	6.22
Children's facilities	4.93	5.42
Availability of washrooms	6.04	5.88
Cleanliness of washrooms	5.61	5.91
Communications / Internet services	4.89	5.08
Baggage service	5.62	6.21
Animal care	5.27	6.10
Overall comfort and quality	5.84	5.86
Overall customer service	5.49	5.94
Rating were between 1-7 with one indicating the lowest level of satisfaction (completely dissatisfied) and 7 indicating the highest level of satisfaction (completely satisfied).		

Tables III and IV provide a summary of passenger satisfaction by ranking the amenities from lowest level of satisfaction to the highest level of satisfaction.

TABLE III		
Issues Ranking - Ports aux Basques-North Sydney Service		
Ranking	Issue	Avg. rating
1	Availability of cabins	3.46
2	Internet based reservations	4.44
3	Communications / Internet	4.89
4	Children's facilities	4.93
5	Quality of cabins	5.27
6	Animal care	5.27
7	On Board entertainment	5.35
8	Overall customer service	5.49
9	Quality of food	5.52
10	Cleanliness of washrooms	5.61
11	Baggage service	5.62
12	On board tourism/ other info	5.63
13	Places to eat	5.64
14	Overall comfort and quality	5.84
15	Sailing Schedule	5.85
16	Boarding wait times	5.93
17	Lounges	5.96
18	Quality of seating	6.01
19	Availability of washrooms	6.04
20	Reservations call service	6.04
21	Staff available for questions/ help	6.06
22	Availability of seating	6.33

Ranking	Issue	Avg. rating
1	Availability of cabins	3.14
2	Internet based reservations	4.88
3	Communications / Internet	5.08
4	Sailing Schedule	5.16
5	Places to eat	5.18
6	Quality of food	5.31
7	Boarding wait times	5.32
8	Children's facilities	5.42
9	Reservations call service	5.71
10	On board tourism/ other info	5.83
11	Overall and quality	5.86
12	Availability of washrooms	5.88
13	Quality of seating	5.89
14	Cleanliness of washrooms	5.91
15	Overall customer service	5.94
16	Availability of seating	5.97
17	Quality of cabins	6.00
18	Lounges	6.09
19	Animal care	6.10
20	Baggage service	6.21
21	On Board entertainment	6.22
22	Staff available for questions/ help	6.25

On both crossings, the top three services with the poorest rating were the same. These included:

- the availability of cabins - on the Argentia run 39.5 per cent of passengers specifically complained they could not get a cabin; some did not know of a waiting list;
- Internet based reservations systems – the system is considered to be very slow and frustrating. Speed of moving among pages is very slow and, when a reservation time is not available, users have to return to the original page and input all data again; and
- Communications - with regards to communications, 29.6 per cent of passengers on the Argentia crossing complained they could not understand communications made via the ship's Public Address system.

Other issues of note are:

- The lack of on-board tourism information was ranked 10 on both services;
- The sailing schedule and wait times seems to be more problematic for the Argentia run; and
- Quality of food receives similar lower rankings on both service runs;
- On the Port aux Basques run the availability of seating, washrooms and staffing received the highest level of satisfaction rating; and
- On the Argentia run the availability of staff, on-board entertainment and baggage services received the highest ratings.

A minimum target rating for all amenities has not been established for the purposes of this project and therefore, there are no conclusions respecting amenities that fail to meet minimum levels of performance; however, the following observations are provided:

5.0 Jurisdictional Comparison: Ferry Services

One aspect of this project was to assess how the Marine Atlantic ferry services compared with like services in other jurisdictions.

Assessing ferries based on information available through print does not provide for a fair comparative review. Information available through promotional and other literature reflects the best side of vessels serving the route and this may not reflect the actual experience of the respective crossing and service provided. For this reason, while amenities available on other ferry services have been compared, it is difficult to assess the quality, accessibility and adequacy of the services.

One of the key issues that determine overall customer satisfaction with a ferry crossing is the timeliness and efficiency of the service. Service delays arising from mechanical problems, weather delays and other technical considerations was a particular irritant for passengers and while these problems can affect most ferry services, they are more generally associated with aging vessels. Information that would enable a comparison of mechanical or technical delays with vessels in other jurisdictions was not available.

Other factors that determine the service availability on ferries are the overall demand for services and the ability to meet this demand, (i.e. capacity, and overall cost efficiencies). An assessment of these issues is not within the scope of this project.

A comparison of fares is not practical due to the differences in passenger categories among vessels, changes in fares to account for seasonal demand and travel incentives which are sometimes provided on crossings to balance peak demand periods.

The following tables provide an outline of the basic amenities provided on ferries. Again, the information does not address issues of quality that impact passenger satisfaction levels.

5.1 *British Columbia*

The first two vessels are operating in British Columbia waters by BC Ferry Services Inc., which, with a fleet of 38 vessels, has the most experience in ferry service in Canada. It serves a diverse range of communities - up to 47 ports of call - along the coast of British Columbia and it services these ports with a wide range of vessels in terms of size and class. BC Ferries also provide large terminals with kiosks, office services and marketplace for food and supplies. These services are often contracted out to private sector operators. The two routes considered are the "Inside Passage" and Horseshoe Bay-Departure Bay

runs. The vessels that serve these runs are essentially new and provide a modern, clean and very comfortable environment.

Tables V and VI provide a summary of the BC ferry services highlighted.

TABLE V British Columbia: Inside Passage and Queen Charlotte Islands	
Ferry name	➤ Northern Adventure
Year Built, Place	➤ 2004, Greece. Launched in BC after an \$18million refit
Distance	➤ 274 miles
Speed and travel time	➤ 19.0 knots; 15 hours crossing
Size	➤ Overall length: 117 meters ➤ Gross tonnage: 9,925
Car and passenger capacity	➤ Passengers and crew: 600 ➤ Cars: 100
Food and beverage	➤ 1 Café; 1 lounge with movies
Entertainment	➤ Unconfirmed
Accommodations/seating	➤ Cabins (luxury, outboard and inboard options) ➤ Private 4 berths rooms
Washroom facilities	➤ Fully accessible
Technology/Internet	➤ Telephone service
Children's services	➤ "Kids Zone" - includes activities and children's movies
Air conditioning	➤ Yes, designated areas
Information services	➤ Yes
Handicap services	➤ Fully accessible
Other on board amenities	➤ Gift shop ➤ Elevator
Innovative approaches	➤ Purser's Square
Best practices	➤ The experience is designed as an extension of the travel experience for vacationing passengers and others. ➤ Services are designed to be fully available within 20 minutes of ferry sailing and are available throughout up until 20 minutes of docking.

TABLE VI
British Columbia:
West Van - Nanaimo (Horseshoe Bay-Departure Bay)

Ferry name	➤ MV Coastal Renaissance
Year Built, Place	➤ 2007, Germany
Distance	➤ 30 miles
Speed and travel time	➤ 21 knots; 1 hour 35 minutes
Size	➤ Gross tonnage: 1,777 ➤ Length: 160.0 meters
Car and passenger capacity	➤ Passengers: 1,600 ➤ Crew: 35 (unconfirmed) ➤ Cars: 370
Food and beverage	➤ Sitka Coffee Place – an upscale coffee lounge providing panoramic views. A fee of \$10.00 provides full access and complimentary hot and cold beverages and snack options served such as zucchini loaves, mountain flax bars, biscotti, and oat & fruit bars. ➤ Coastal Cafe, Coast Cafe Express ➤ The Seawest Lounge (also exclusive at \$10.00 per person)
Entertainment	➤ Unconfirmed
Accommodations/seating	➤ No dedicated sleeping facilities
Washroom facilities	➤ Offers large washrooms with modern conveniences
Technology	➤ Internet, telephone and banking Kiosk ➤ Business work stations in quiet area
Children’s services	➤ Kid zone play area
Air conditioning	➤ Unconfirmed
Information services	➤ Tourism information and vacation planning support in main area.
Handicap Services	➤ Full access; dedicated washrooms
Other on board amenities	➤ 1500 square foot onboard gift shop offering high end apparel and accessories; ➤ Conference room ➤ 2 sheltered solariums
Innovative approaches	➤ Offering business support services to business travelers ➤ Offers quiet locations with more conveniences on a user pay basis
Best practices	➤ A new BC Ferries Experience™ Card is an electronic swipe card that can be loaded with money and used to pay for ferry travel including reduced fares wherever they’re available. Cardholders also receive Loss protection for your card’s balance, capability to transfer money between cards, a travel history report showing travel on your card, an ability to secure priority travel on three major Vancouver Island/Mainland routes ➤ Specific service for business passengers including work station with Internet access ➤ Terminal services which include internet access, banking, food and beverage services

5.2 Nova Scotia

The “CAT” which operates out of Nova Scotia is a faster vessel and just 6 years old. Again, its décor, polish and level of amenities offer passengers an enhanced experience. A focus on tourism travel and services to help tourist integrate the ferry crossing with other tourism products is seen as being effective.

TABLE VII: Yarmouth-Portland Maine	
Ferry name	➤ The CAT
Year Built, Place	➤ 2002
Distance	➤ unconfirmed
Speed and travel time	➤ 36 knots; 5.5 - 7 hours crossing
Size	➤ 97.22m
Car and passenger capacity	<ul style="list-style-type: none"> ➤ Passengers: 175 ➤ Crew: 125 ➤ Cars: 240 ➤ Motor homes: 14
Food and beverage	<ul style="list-style-type: none"> ➤ Café serves meals throughout the day and offers a variety of choices for breakfast, lunch and dinner; ➤ Two bar lounges serve a variety of specialty drinks and cocktails
Entertainment	<ul style="list-style-type: none"> ➤ Two sitting lounges ➤ Two movie lounges, one showing general audience movie features and the other featuring sports events featuring large screen TV's ➤ Casino with 71 slot machines
Accommodations/seating	<ul style="list-style-type: none"> ➤ Lounges provide reclining seating ➤ No dedicated sleeping facilities provided
Washroom facilities	➤ Yes
Technology/Internet	➤ Unconfirmed
Children's services	➤ One children's lounge featuring children's movies
Air conditioning	➤ Yes
Information services	➤ Yes-Tourism information, Itineraries and Interactive modules
Handicap Services	➤ Full access to all services
Other on board amenities	<ul style="list-style-type: none"> ➤ Large duty free gift shop ➤ Covered viewing deck with floor to ceiling panoramic viewing ➤ On board pet kennel
Innovative approaches	➤ Have integrated service into broader tourism products. Web site has linkages to other tourism products/venues and facilitates vacation planning for a wide range of travelling experiences.
Best practices	<ul style="list-style-type: none"> ➤ All services are available within 20 minutes of the vessels departing. ➤ Promoted as an overall tourism experience offering day cruises and quick “get-away” packages. ➤ Also collaborates with other tourism offerings to provide opportunities for complete travel packages including land tours, accommodations and meals.

5.3 International

The number of ferries operating in Britain, Europe and the Mediterranean are too numerous to fully assess. The type of vessel, age, duration of trip and fees vary considerably. For the purposes of this project two routes were selected, again based on comparative considerations with Marine Atlantic routes.

TABLE VIII: Poole to Cherbourg Route	
Ferry Name	➤ MV Barfleur (Brittany Ferries)
Year Built, Place	➤ 1992,Finand
Distance	➤ Unconfirmed
Speed and travel time	➤ 19.5 knots ➤ Classic cruise: 4 ½ hours (day); 6 ½ hours (overnight)
Size	➤ Gross tonnage: 20,133; Length: 157.65 meters
Car and passenger capacity	➤ Passengers: 1,212; ➤ Crew: 92 ➤ Cars: 547
Food and beverage	➤ 1 main restaurant (Les Dunes) ➤ 1 self service restaurant (Turquoise) ➤ 1 coffee and tea shop (Arc en Ciel) ➤ 1 bar (Les Alizés) ➤ Gift shop sells wines and spirits
Entertainment	➤ Seasonal ➤ Adult games room with slot machines
Accommodations/seating	➤ Cabins: 72 (4 berth; all air conditioned) ➤ Cots: 200 ➤ Reclining seats: 295
Washroom facilities	➤ As per industry standards
Technology/Internet	➤ Full internet access ➤ Telephone services
Children's services	➤ Children's playroom, change rooms and entertainment ➤ Video games room for teenage
Air conditioning	➤ Yes –in all areas and cabins
Information services	➤ Tourism information and services ➤ Currency exchange
Handicap services	➤ Yes – accessible cabins
Other on board amenities	➤ Baggage room ➤ Sick bay ➤ Elevator ➤ Sun deck
Innovative approaches	➤ None identified
Best practices	➤ All services are available 20 minutes after the ship has departed ➤ Amenities designed for teenagers;

**TABLE IX:
Prince Edward Island to Magdalen Islands**

Ferry name	➤ MV Madeleine
Year Built	➤ 1979, Ireland
Distance	➤ 140 miles
Speed and Travel Time	➤ 20 knots; 5 hours
Size	➤ 122.5 m ➤ 6807 tones
Car and Passenger capacity	➤ Passengers: 450 (unconfirmed) ➤ Cars: Undetermined
Food and beverage	➤ Family cafeteria ➤ More formal dining lounge ➤ Islander Bar ➤ A higher end "Club" Lounge serving wines and spirits
Entertainment	➤ A separate movie theatre ➤ A Games room for teenage children
Accommodations/seating	➤ 220 cabins with single or double beds and full washrooms, including shower; linens provided ➤ 4 seating lounges with reclining chairs: one with large screen TV; 2 adjoining TV lounges and one quiet lounge
Washroom facilities	➤ Available on all decks
Technology/Internet	➤ Unconfirmed
Children's services	➤ Children's recreational center with toys ➤ Children's shows and activities
Air conditioning	➤ Unconfirmed
Information services	➤ Information booth and staff located in main Hall
Handicap services	➤ All services fully accessible
Other on board amenities	➤ First Aid area ➤ Elevator ➤ Pet Services ➤ Convenience store ➤ Observation Lounge and Sundeck ➤ Fitness room and massage services
Innovative approaches	➤ Focus is on tourism aspect of trip and marketed as cruise opportunity. ➤ Cold Water cruises developed with thematic approach that includes observation of seals and ice flows and includes outdoor and cultural activities. \
	➤ Have also linked the service to other tourism venues such as tours and bicycle tours
Best practices	➤ Offers a range of "higher level" luxury services ➤ Tourism focus

Table X on the following pages provides a brief comparison of how the noted ferries compare in terms of age, capabilities, amenities and other considerations. Where appropriate, best practices have been identified. These were referenced in relation to opportunities to enhance amenities and service levels on Marine Atlantic crossings.

TABLE X
Comparative Summary of Amenities Available on Noted Ferry Services

Route and Distance	Inside Passage-Queen Charlotte Islands	Horseshoe Bay-Departure Bay	Yarthumbouth-Portland Maine	Poole to Cherbourg Route	PEI to Magdalen Islands	Port aux Basques-Sydney	Argentia-Sydney
Vessel	Northern Adventure	MV Coastal Renaissance	The CAT	MV Barfleur	MV Madeleine	MV Caribou	MV Joseph and Clara Smallwood
Year Built	2004	2007	2002	1992	1979	1990	1990
Size	117 meters	160 meters	97.23 meters	158 meters	122.5 Meters	179 meters	179 meters
Distance	274 miles	30 miles	175 miles		140 miles		280 miles
Speed and time	19 knots; 15 hrs	21 knots; 1 hr 35 min	36 knots; 5.5 hrs	19 knots, 4.5-6.5 hrs	20 knots; 5 hrs		15-22 knots; 14-17 hours
Passenger Capacity	600	1600	175 + crew	1,212	450	1200	1200
Car capacity	100	370	240 + 14 motor homes	547	Unconfirmed	340	340
Food and Beverage Lounge	-1 cafeteria -1 lounge	-1 self service cafeteria -Upscale coffee lounge (\$10.00) -Express coffee outlet -Upscale lounge (\$10.00 fee)	-Cafeteria throughout voyage -2 Bar lounges -Coffee outlet	-1 main restaurant -1 cafeteria -1 coffee/tea shop -1 bar lounge	-1 family cafeteria -1 formal dining area -1 bar lounge -A high end lounge with wines/spirits (\$10.00 fee)	-1 cafeteria -1 bar lounge 1-snack	-1 cafeteria -1 bar lounge 1-snack
Entertainment	-1 lounge with movies	-Unconfirmed	-2 movie lounges -Casino	-Adult games -Slot machines -Seasonal entertainment	-A movie theatre	-TV lounge -Seasonal entertainment	-TV lounge -Seasonal entertainment
Cabins/ Berths	-Luxury cabins -4 bunk berths	-None	-None	-72 cabins; -200 cots -295 reclining seats		-Cabins with 4 berths and full wshrm/shower -Dormitory	-Cabins with 4 berths and full wshrm/shower -Dormitory

*Passenger Amenities for Future Marine Atlantic Fleet
Final Report*

						sleepers	Sleepers
Washrooms	Consistent with industry standards. Newer vessels tend to provide more space						
Technology/Internet	Telephone service	-Internet -Telephone -Banking Kiosk		Full internet and telephone services			
Children's Facilities	"Kid's Zone" with movies and activities	Kid's play zone	-Kid's lounge with toys and movie	-Children's play area and entertainment -Video gaming room for older children	-Kid's recreational area with shows and activities -A games room for older children	-Children's play area with toys	-Children's play area with toys
Air Conditioning	In designated areas	Unconfirmed	Yes	Yes-throughout	Unconfirmed	No	No
Information/Tourism services	Yes	Yes, facilitates tourism planning	Yes-vacation planning	Yes Currency exchange	Main information center	No	No
Handicap Services	Yes	--Dedicated washroom	Fully accessible	Fully a accessible	Full accessible	Fully accessible	Fully accessible
Other on board amenities	-Gift shop -Elevator	-Large gift shop -Conference room -Sheltered solariums	Large gift store Observation with panoramic view	Sun deck	-Convenience store -Sundeck -Fitness Room -Massage Services	-Meeting facilities -Gift Shop	-Meeting facilities -Gift Shop
Innovative approaches		-Electronic swipe cards -Services for business pass. -Terminal services include banking, food and beverage	-Information centre provides support for vacation planning with links to other tourism providers		-Focus on tourism with seasonal cruise themes. -Established links with other tourism providers to facilitate vacation planning	-None Noted	-None Noted
Best practices			All services available within 20 minutes of vessel departure	All services available within 20 minutes of vessel departure	Focus on marketing tourism focus	-None Noted	-None Noted

6.0 Summary

This project was intended to identify passenger satisfaction levels with current on board amenities available on Marine Atlantic crossing and identify areas where passenger needs are not being met. The project was not intended to identify solutions for gaps in service levels. Notwithstanding, there are a number of issues which were raised with a fair degree of consistency and these can be highlighted.

Passengers consistently identified the lack of available and quality of sleeping accommodations, schedule delays, the effectiveness of the Internet-based reservation system and on board communications as the areas of greatest dissatisfaction. Some of these issues, such as sleeping accommodations, will require longer-term solutions while others, notably the speed and efficiency of the Internet site, can be addressed relatively quickly. This is also the case with the poor quality of the on board public address system which was identified as a source of frustration for passengers.

As well, in reviewing ferry services in other jurisdictions, a number of best practices were identified that could improve Marine Atlantic's services for its passengers. These include:

- Ensuring all services are available throughout the duration of the voyage;
- Ensuring services are fully available within 20 minutes of departure and throughout the voyage until just 20 minutes before arrival;
- Integrating tourism marketing with the trip by providing on board tourism information and the capacity to plan a trip prior to arriving at port. The ability to develop partnerships with other tourism operators and potentially enable passengers to make bookings while on board would also enhance tourism services;
- Availability of banking services; and
- On board activities for teenage children.

On a final note, there is merit in monitoring passenger satisfaction levels on a go forward basis. To support an ongoing assessment it may be appropriate to establish minimum ratings or "benchmarks" for passenger amenities and then track customer satisfaction over time. This should be undertaken using a consistent methodology.

APPENDICES

Appendix A:

Key Informant Interview

A-1 Interviewees

Operators:

Paul Alcock	Northland Discovery Tours
Richard Arnold+3 field staffers	Ambassadors Greyline
Rex Avery	Glynmill Inn
Peter Fenwick	Inn on the Cape, Cape St. George
Barb Genge	Tuckamore Lodge
John Kelly	Harold's Hotel
Alice Keeping	Codroy Valley Vacations Business Network
Angus Kettle	Crabbes River Outfitters
Sue Rendell	Gros Morne Adventures
Connie Rose	Glynmill Inn
Mike Wakeman	My NL Adventures
Scott Parsons	Parsons and Sons Transportation
Unconfirmed	Anqusk Outfitters

Government and Industry Representatives:

Charlotte Jewczyk	Provincial Dept of Tourism
Cathy Anderson	Provincial Dept of Tourism
John Summers	NL/ Lab Independent Trucker's Assoc
Derek Butler	Association of Seafood Producers
Nancy Healey	Board of Trade
Jeanette Yetman	Destination St. John's
Judy Bond	Western NL Destination Marketing Organization
Nora Mercer	Western NL Destination Marketing Organization
Melissa Byrne	NL and Lab Outfitter's

Other:

Gareth Iglolioute	BMT Fleet Technology
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A-2: Key Informant Interview Protocols

**Interview Guide: Tourism Operators
Marine Atlantic Newfoundland Crossings**

Thinking of the two noted ferry services to NL:

1. Do/have many of your clients utilize (d) either of the 2 Marine Atlantic ferries in accessing the province?
Yes
No
2. Based on your knowledge, is the current level of amenities provided on the designated ferry crossings meeting passenger needs and expectations?
Yes
No
3. Based on your knowledge, how do the noted Marine Atlantic ferries and their on-board amenities compare with ferries that service like routes elsewhere in Canada and/or Europe? Please explain.
Same
Better
Worse
Don't know
4. What on-board amenities and other service issues are priorities and need to be incorporated into the design of future ferries servicing the province?
5. Do you feel that current level of service available on Marine Atlantic affects the provincial tourism industry? Please explain.
6. Are there any further comments regarding service issues you would like to make?

**Interview Guide: Government Representatives
Marine Atlantic Newfoundland Crossings**

Narrative Introduction

Thinking of the two noted ferry services to NL:

1. Has your office undertaken any assessments of amenities on these ferry services and if they are meeting the needs and expectations of users/passengers?
If so: What were the findings? - *Access copy*
2. Are there any other sources of customer feedback that you would reference for the purposes of this study?
3. Based on your knowledge, is the current level of amenities provided on the designated ferry crossings meeting passenger needs and expectations? Please explain.
4. Based on your knowledge, how do the noted Marine Atlantic ferries and their on-board amenities compare with ferries that service like routes elsewhere in Canada and/or Europe? Please Explain
5. What on-board amenities and other service issues are priorities and need to be incorporated into the design of future ferries servicing the province?
6. Do you feel that current level of service available on Marine Atlantic affects the provincial tourism industry? Please explain.
7. Are there any special concerns regarding the incidence or services available to commercial truck traffic?

Appendix B:

Passenger Survey Response:

B-1 Results of Passenger Survey: Argentia - North Sydney Ferry Crossing

Sample Size: 119 (unless otherwise stated)

	Survey Question	Responses	Incidence	
			#	%
1.	Is this your first time using this ferry? (119)	-Yes -No	55 64	46.2 53.8
2.	How many times a year do you currently use the ferry? (64)	-Less than once a year -Once a year -2-5 times per year -More than 5 times per year	50 13 1 0	78.1 20.3 1.5 0
3.	What is the purpose of today's trip? (119)	-Business/work -Recreation/Vacation -Other	5 107 7	4.2 89.9 5.9
4....	How many people are in your party? (119)	1 person 2 people 3 people 4 people 5 people 6 people 7 people Other	9 37 25 20 14 3 1 1	7.6 31.1 21.0 16.8 11.8 2.5 1.5 1.5
5.	Experience with on board amenities and level of satisfaction where 1 is the lowest level (completely dissatisfied) and 7 being the highest (completely satisfied) (119)	Average Overall Rating		
		Reservations call service	92	5.71
		Internet based reservations	42	4.88
		Sailing Schedule	117	5.16
		Boarding wait times	118	5.32
		On board tourism and other information	71	5.83
		Staff availability for questions or help	98	6.25
		Places to eat	109	5.18
		Quality of food	105	5.31
		Availability of seating	116	5.97
		Quality of seating	116	5.89
		Availability of cabins	78	3.14
		Quality of cabins	36	6.0
		Lounges	112	6.09
	On Board entertainment	104	6.22	
	Children's facilities	19	5.42	

		More cabins with 2 berths	5	4.2
		Better view of movies	5	4.2
		Slot machines	3	2.5
		Free Internet	2	1.7
		Personal TV	2	1.7
		Bookstore/library	2	1.7

B-2 Results of Passenger Survey: Port-aux Basques-North Sydney Route

Sample Size: 77

	Survey Question	Responses	Port-Aux Basques	
			#	%
1.	Is this your first time using this ferry? (77)	-Yes -No	31 46	40.0 60.0
2.	How many times a year do you currently use the ferry? (46)	-Less than once a year -Once a year -2-5 times per year -More than 5 times per year	26 11 7 2	56.5 23.9 15.2 4.3
3.	What is the purpose of today's trip? (77)	-Business/work -Recreation/Vacation -Other	7 65 5	9.1 84.4 6.5
4	How many people are in your party? (77)	-1 person -2 people -3 people -4 people -5 people -6 people -7 people -other	13 39 9 6 2 4 2 2	16.9 50.6 11.7 7.8 2.6 5.2 2.6 2.6
5.	Experience with on board amenities and level of satisfaction where 1 is the lowest level (completely dissatisfied) and 7 being the highest (completely satisfied) (77)	Response Rate and Average Satisfaction Score		
			Number	Score
		Reservations call service	54	6.04
		Internet based reservations	32	4.44
		Sailing Schedule	74	5.85
		Boarding wait times	76	5.93
		On board tourism and other information	43	5.63
		Staff availability for questions or help	51	6.06
		Places to eat	64	5.64
		Quality of food	62	5.52
		Availability of seating	76	6.33
		Quality of seating	76	6.01
		Availability of cabins	28	3.46
		Quality of cabins	15	5.27
		Lounges	52	5.96
		On Board entertainment	62	5.35
	Children's facilities	13	4.93	
	Availability of washrooms	70	6.04	
	Cleanliness of washrooms	69	5.61	

		Communications / Internet services	36	4.89
		Baggage service	12	5.62
		Animal care	14	5.27
		Overall comfort and quality	72	5.84
		Overall customer service	68	5.49
6.	Have you travelled on ferry crossings in other provinces or countries?(77)	Yes→	34	44.2
		How would you compare with your other experience on other ferries (34):		
		-Much better	4	5.2
		-Somewhat better	9	11.7
		-About the same	11	14.3
		-Somewhat worse	3	3.9
		-Much worse	3	3.9
		-Don't Know	4	5.2
		No	43	55.8
7.	Are there amenities that are not provided on board this vessel that you feel should be available? (77)	Blankets	5	6.5
		Personal TV's	4	5.2
		Reading materials (See below # 8)	2	2.6
8.	What would make this ferry crossing a more pleasurable experience for you? (77)	Ability to get a cabin	18	23.4
		More comfortable seating; arm rests could not be moved; too close	15	19.5
		Cleaner washrooms with toilet paper (no toilet paper-8)	11	14.3
		Better food choice & quality	10	13.0
		Longer lasting entertainment	10	13.0
		Better sailing schedule	8	10.4
		Internet access	8	10.4
		Better PA System	7	9.1
		Blankets	5	6.5
		More toys for children	5	6.5
		Personal TV's	4	5.2
		Activities for teens	3	3.9
		Better coffee	3	3.9
		Internet access at terminals	3	3.9
		Slot machines	3	3.9
		Reading materials	2	2.6
		Bathroom on top deck	2	2.6