



Washington State Transportation Commission

WSF Summer Ferry Performance – FROG Survey

2016 Summary Presentation

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.

The FROG research initiative in 2016 consists of the following main phases:

- Winter Customer Survey Study (target audience: commuter riders) via FROG
- Freight Survey (target audience: WSF freight customers) via executive telephone survey
- Spring Reservation Study via FROG
- General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS
- **Summer On-board Recreational Survey (target audience: Out of state riders)**
- **Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)**

The focus of this report is the Summer Ferry Performance Recreational Study

Methodology:

- ▶ A total of four thousand twenty seven (n=4827) ferry riders completed the Summer 2016 FROG performance, recreational and policy survey yielding a maximum sample variable of +/- 1.4% at the 95% confidence level.
- ▶ A total of seven thousand seventy nine (n=7279) ferry riders completed the Summer 2016 onboard recreational survey yielding a maximum sample variable of +/- 1.1% at the 95% confidence level.

EMC Project # 16-6231

EMC was not part of the data collection process. Some percentages may not add up to 100% due to rounding.



Satisfaction

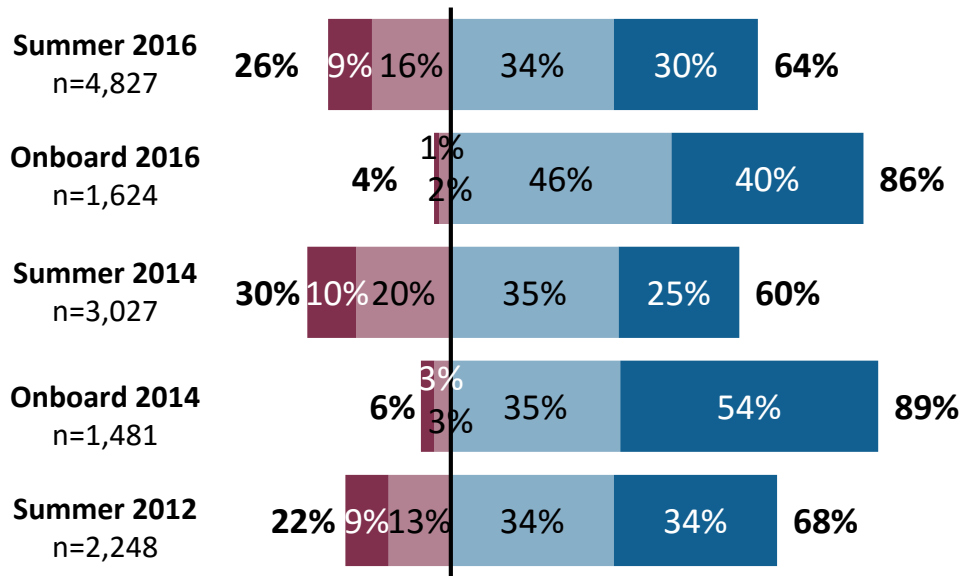
Overall Satisfaction



The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has increased overall compared to 2014 (64% vs. 60%). Onboard survey respondents are more satisfied by a 22 point margin. The Fauntleroy/Vashon route, Fauntleroy/Southworth, Mukilteo/Clinton routes all have higher dissatisfaction rates then the overall. The greatest positive shift from 2014 by route has been among Anacortes/San Juan Island and Southworth/Vashon.

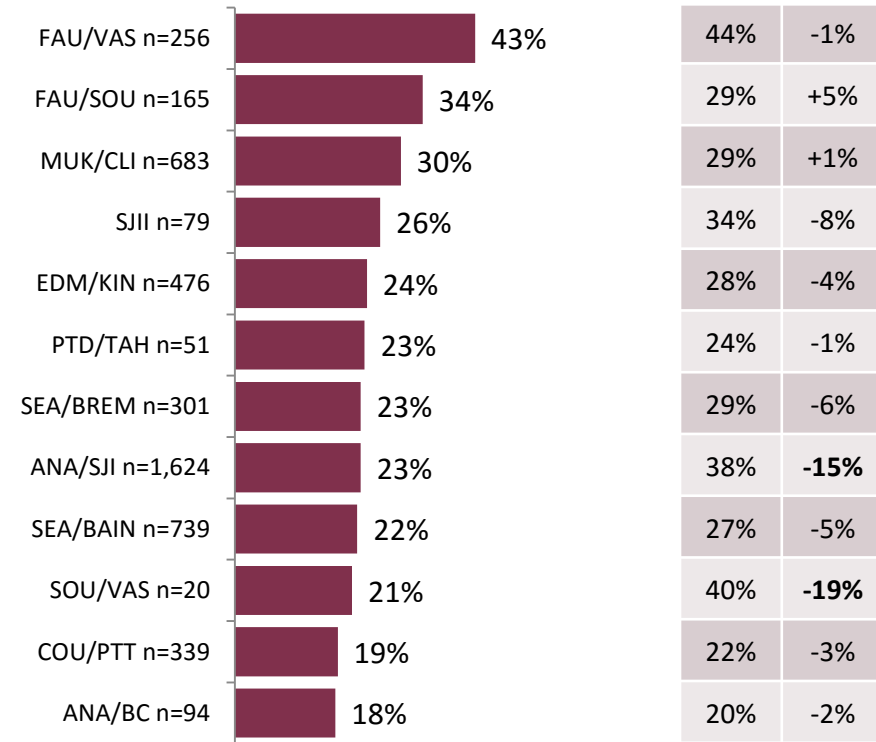
Overall Satisfaction with WSF

Extremely dissatisfied Dissatisfied Satisfied Extremely satisfied



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.
The bold percentages represents the corresponding total dis/satisfaction

Overall Dissatisfaction by Route (Total dissatisfied)



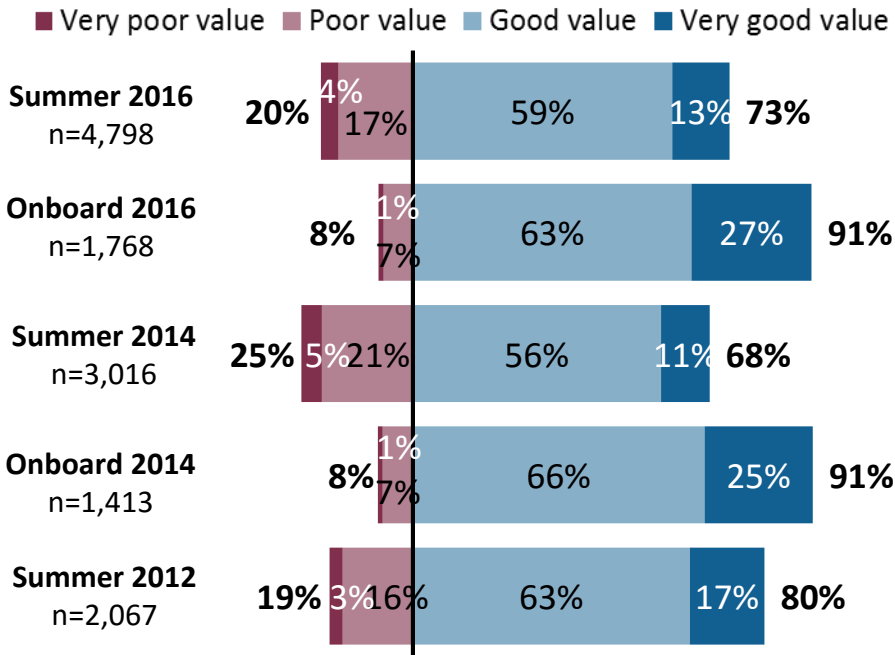
Q20. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer period, June 12th through September 17th. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period?

Overall Value



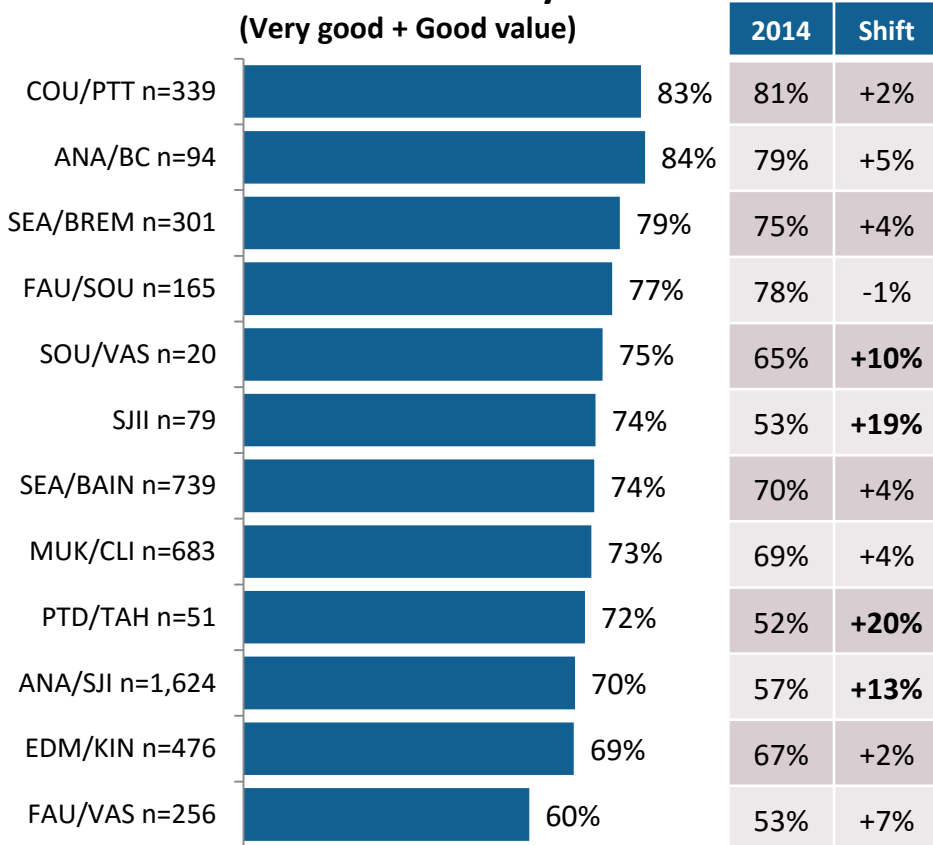
The percentage of riders saying WSF is a “good” or “very good” value in the summer period has increased slightly compared to 2014 (73% vs. 68%). Overall good value is up from summer 2014 across all routes but Fauntleroy/Southworth with most significant increases among riders using Point Defiance/Tahlequah, San Juan Inter Island, Anacortes/San Juan Island and the Southworth/Vashon routes.

Overall Perceived Value of WSF



Only ratings of good or poor are shown, don't know responses are not shown. The **bold** percentages represents the corresponding total good/poor value

Overall 'Good Value' by Route



Q26. For the Summer period (June 12th through September 17th), do you feel that Washington State Ferries is...?

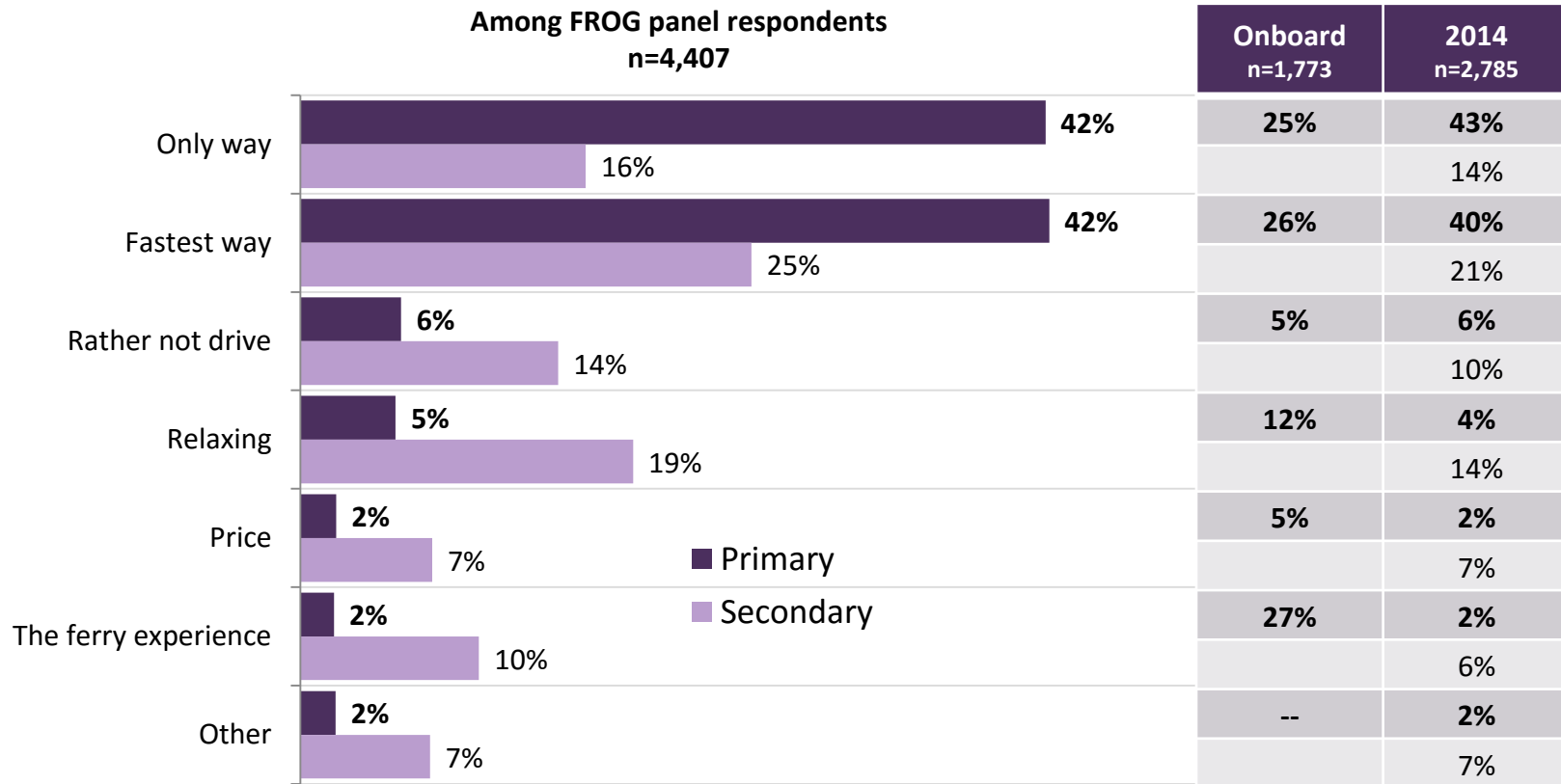
Factors Driving Ferry Decision



Both panel and onboard respondents say “Only way” and “fastest way” are the primary reasons for choosing WSF rather some other way to make a recreational or social trip. Onboard respondents list the ferry experience as a top reason as well.

Factors determining ferry travel

Among FROG panel respondents
n=4,407



Q15a. Which of the following reasons best describes why you chose WSF rather than some other way to make your most recent recreational or social trip?

Q15b. Which other reasons describe why you chose WSF rather than some other way to make your most recent recreational or social trip? (Multiple Response)



Recreation

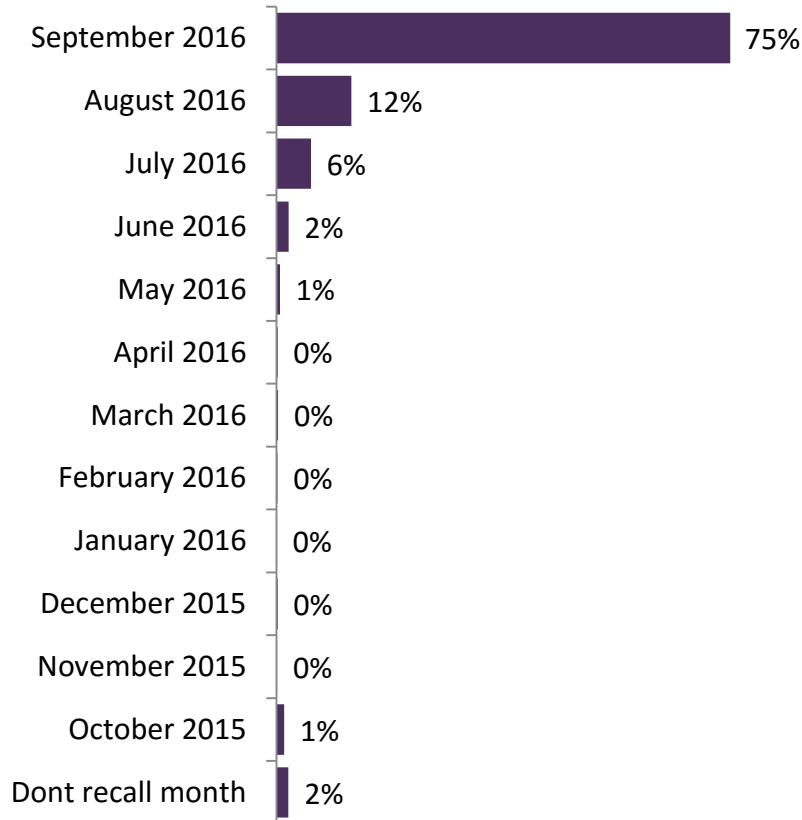
Last Recreational/Social Trip



The vast majority of respondents most recent recreational/social trips were in September, with Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton the top three last recreational routes ridden.

Month of last Recreational/Social Trip

n=4,651



Route of last Recreational/Social Trip

n=4,409

Route	2016	2014	Shift
Seattle/ Bainbridge	25%	26%	-1%
Edmonds/ Kingston	17%	17%	0%
Mukilteo/ Clinton	15%	16%	-1%
Anacortes/ San Juan Islands	11%	11%	0%
Seattle/ Bremerton	10%	9%	+1%
Fauntleroy/ Vashon	7%	7%	0%
Coupeville/ Port Townsend	6%	6%	0%
Point Defiance/ Tahlequah	3%	3%	0%
Fauntleroy/ Southworth	3%	3%	0%
Anacortes/ Sidney B.C.	1%	1%	0%
Southworth/ Vashon	1%	1%	0%
San Juan Interisland	0%	1%	0%

Q2. In which month did you take your most recent recreational or social trip that used WSF?

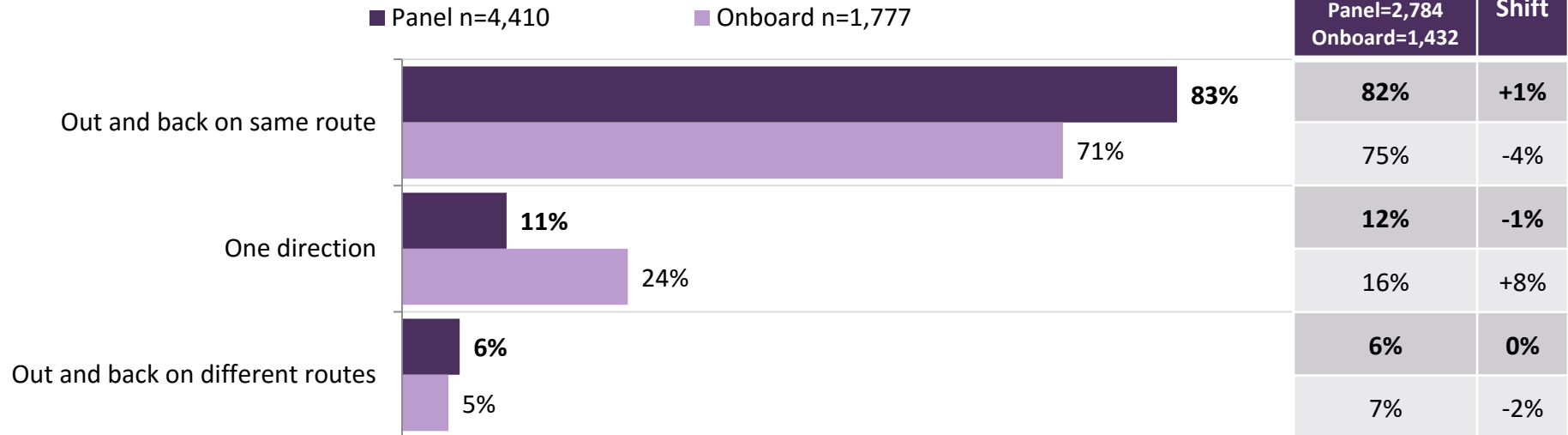
Q3. What was the route that you rode for your most recent recreational or social trip?

Crossings and Trip Duration



Out and back on same route is the most popular crossing for both panel and onboard respondents. ANA/SJI and ANA/BC continue to have the longest mean trip duration.

Number of Crossings on Most Recent Trip



Trip Duration		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		4,345	676	253	46	440	236	145	19	317	613	1448	68	84
2016	Mean number of days	2	2	1	1	2	2	1	1	3	2	4	2	4
2014	Mean number of days	2	2	1	2	2	2	1	2	3	2	4	2	5
2012	Mean number of days	1	1	1	1	1	1	1	1	3	1	3	1	4

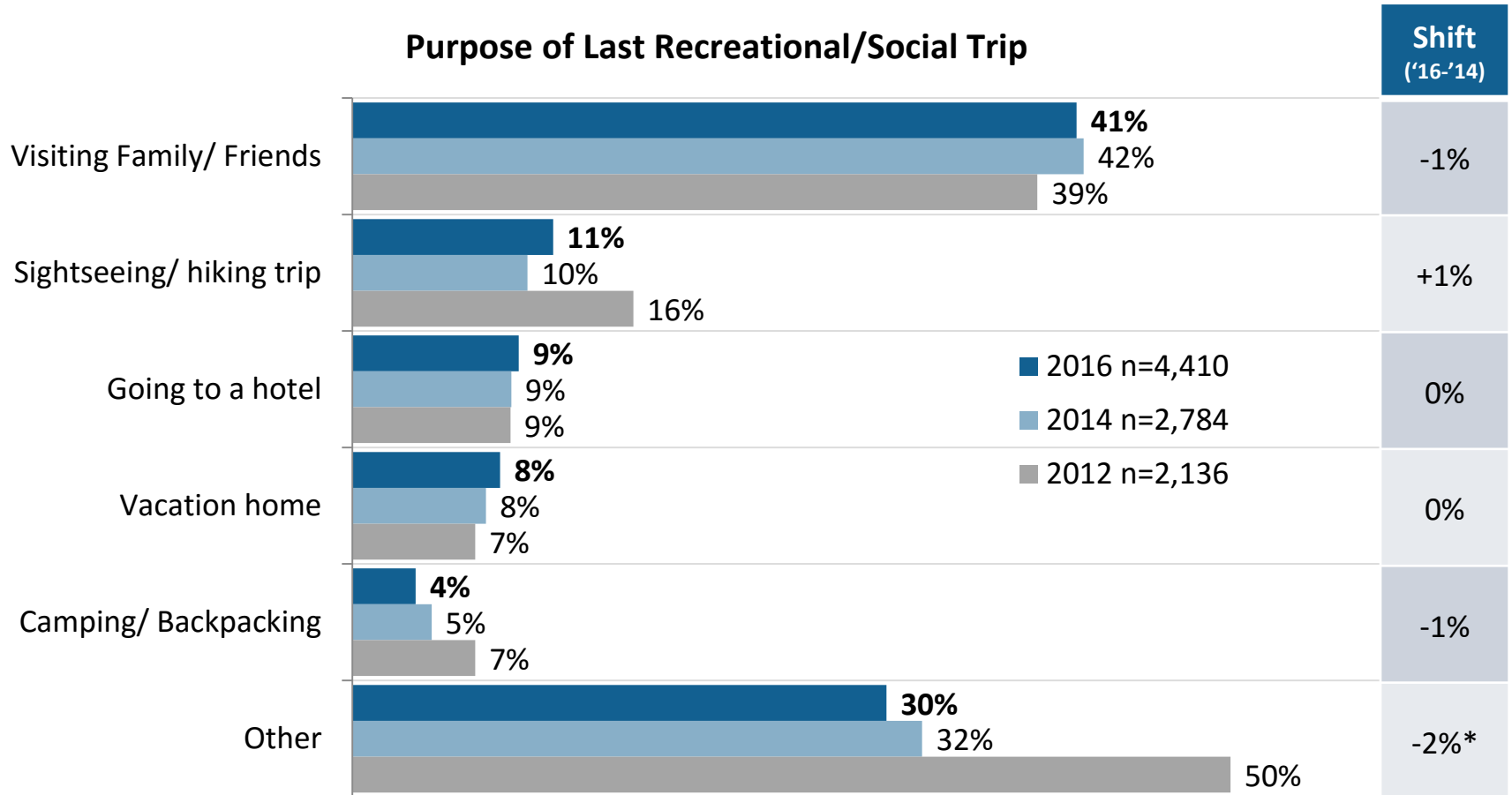
Q11. How many crossings or sailings on Washington State Ferries (WSF) did you take?

Q10. What was the duration (# of days from when you left home to when you returned home) of the trip?

Recreational/Social Trip Purpose



The plurality of respondents describe visiting family or friends as the purpose of their last recreational trip.



Q12. Which of the following best describes your most recent recreational or social trip? (Multiple Response)

*2012 has 4 more categories, which have been collapsed into 'other', amounting to an increase of 16%.

Destination & Relative Ferry Cost

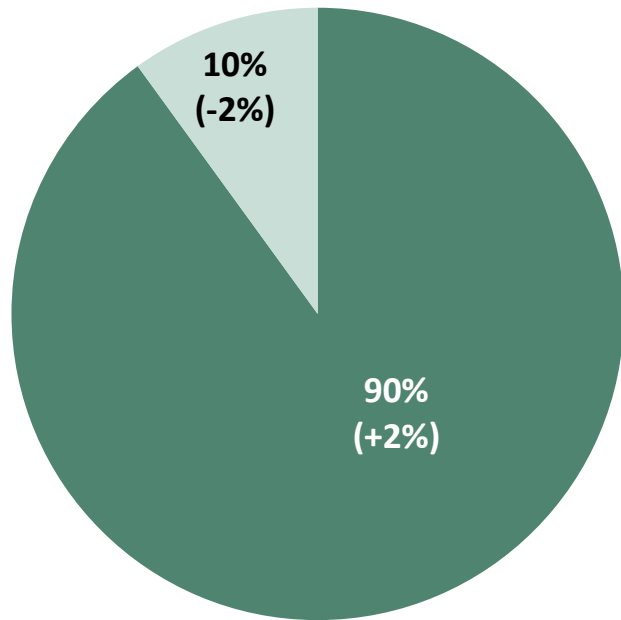


Most respondents say their most recent recreational or social trip was a WA State only trip. Total cost of the ferry fare for the trip is more significant for panel members than for the onboard.

Destination of Last Recreational/Social Trip

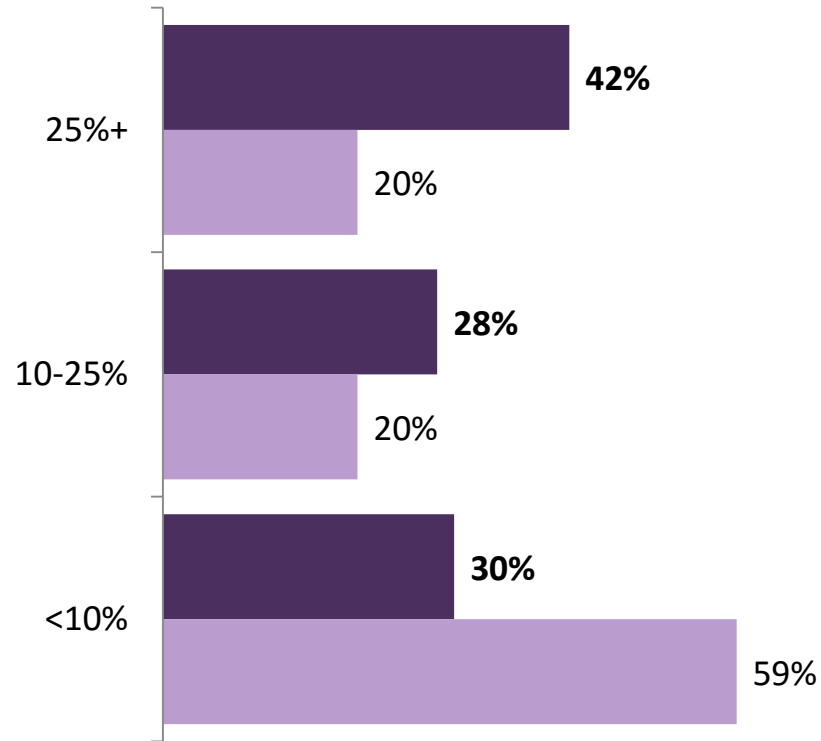
n=4,409

■ Washington State ■ Multistate/Multination



Relative Cost of Last Recreational/Social Trip

■ Panel n=4,410 ■ Onboard n=1,776



2014 P=2,784 O=1,418	Shift
40%	+2%
27%	-7%
30%	-2%
21%	-1%
30%	0%
52%	+7%

Q13. Was your most recent recreational or social trip part of a...?

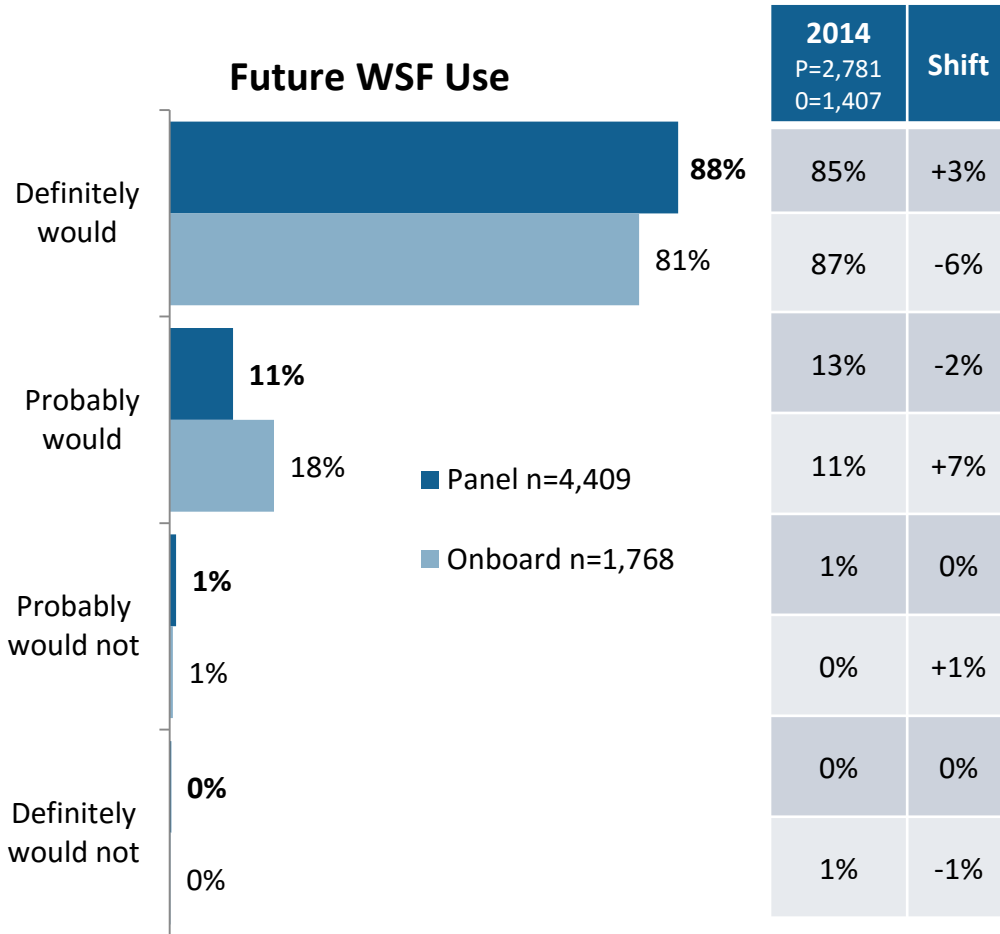
Q14. How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent trip?

Future Recreational/Social Use



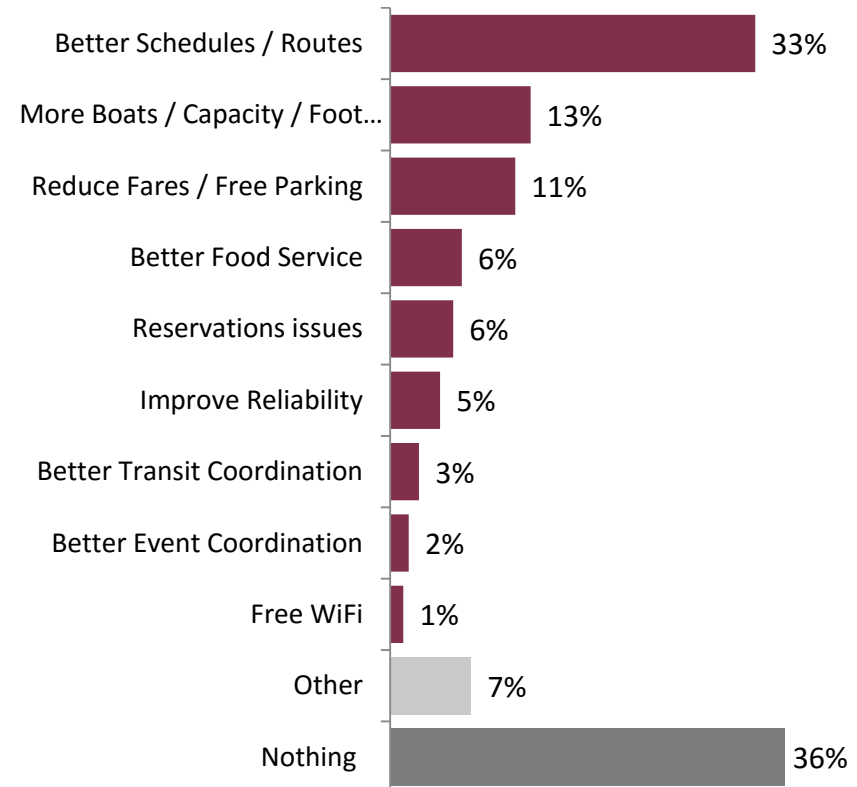
Almost all respondents say they are likely to use WSF again for a recreational or social trip. Better schedules/routes is the top mentioned way to increase the number of recreational or social trips.

Future WSF Use



Influencing More Recreational Use

FROG Panel n=4,385



Q16. How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...?

Q18. Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips that people, like you, make in a year? (Multiple Response)

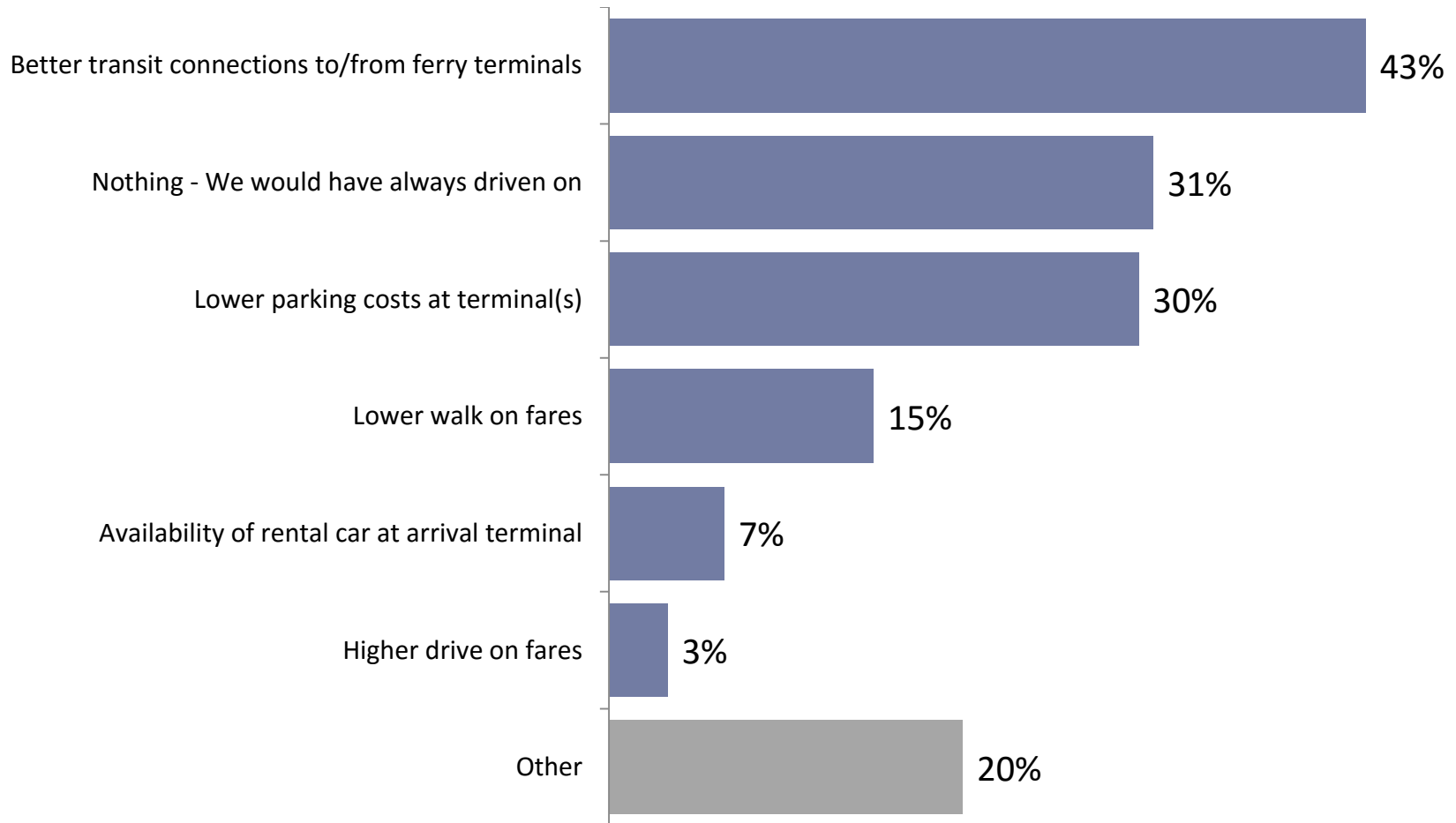


Encouraging Walk-Ons & Funding

Methods of Encouraging Walk



Better transit connections to and from ferry terminals was the top mentioned method of encouraging walk-ons by respondents.

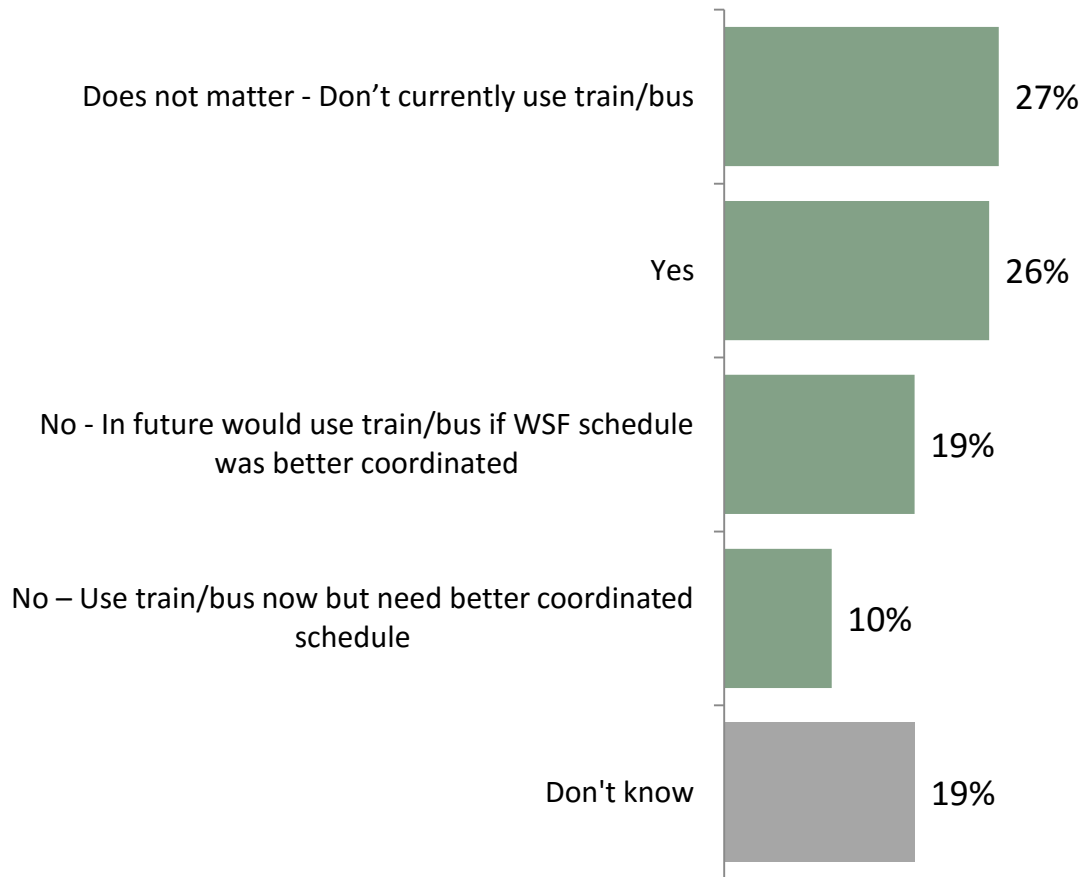


Q71. Thinking about the ferry route you take most often as a driver and vehicle. What, if anything, would encourage you to walk on rather than drive on? (Multiple Response, n=4,826)

Connections Matching Up



Three in ten (29%) say that the ferry schedule does not match up with their needed train or bus connections.

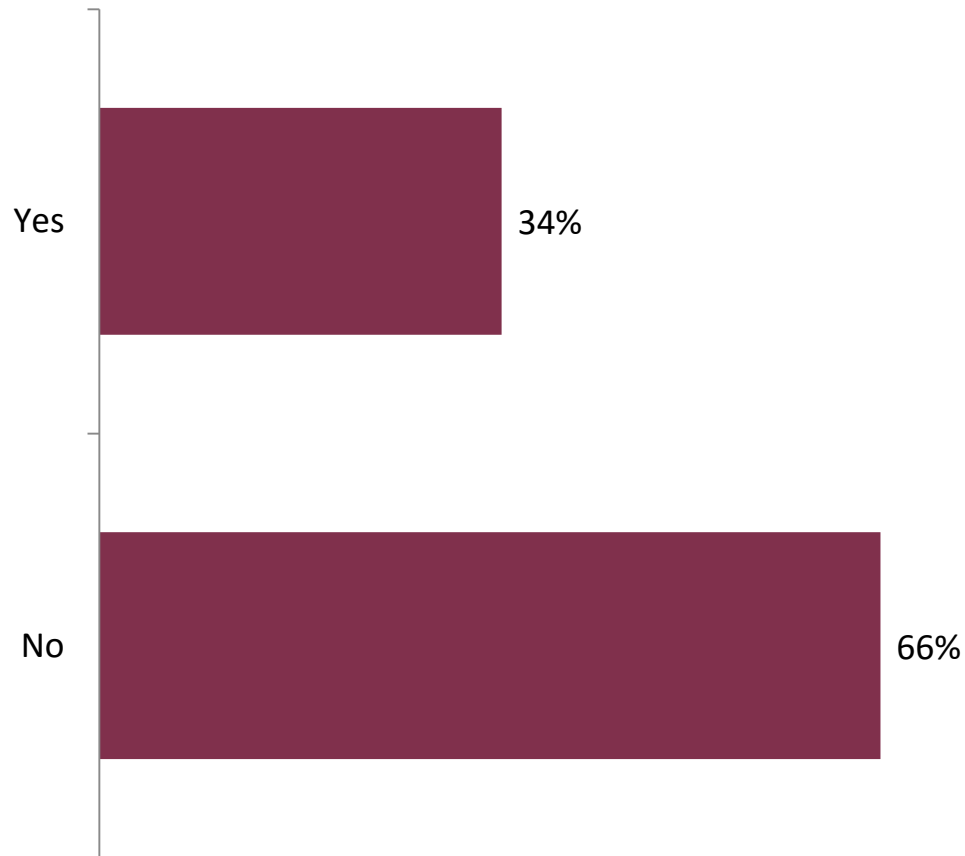


Q72. If you currently make train and bus connections as part of your trip on the ferry, or may make such connections in the future. Does the current ferry schedule (departures/arrivals) on the route you take most often adequately match up with your needed (or potentially needed) train or bus connection? (n=4,825)

Fare and Boarding Type



A third (34%) of respondents believe that the faster growth rate of vehicle fares has encouraged them to travel more as a foot passenger or carpool.



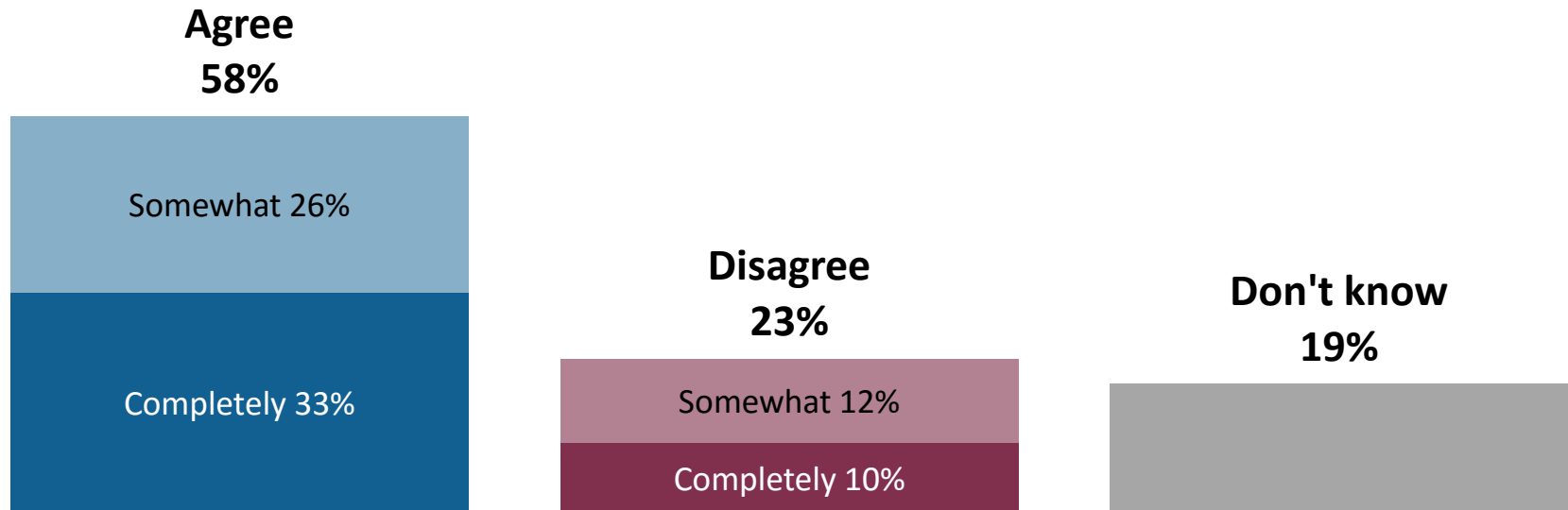
Q73. Over the past few years, passenger fares have been going up at a lower rate than vehicle fares. Has this encouraged you, or not, to travel more as a foot passenger or to carpool? (n=4,827)

Need to Enlarge/Redesign Terminals



58% of respondents agree that some ferry terminals need to be enlarged and /or redesigned to provide more efficient service.

“There are ferry terminals that need to be enlarged and/or redesigned to provide more efficient service.”

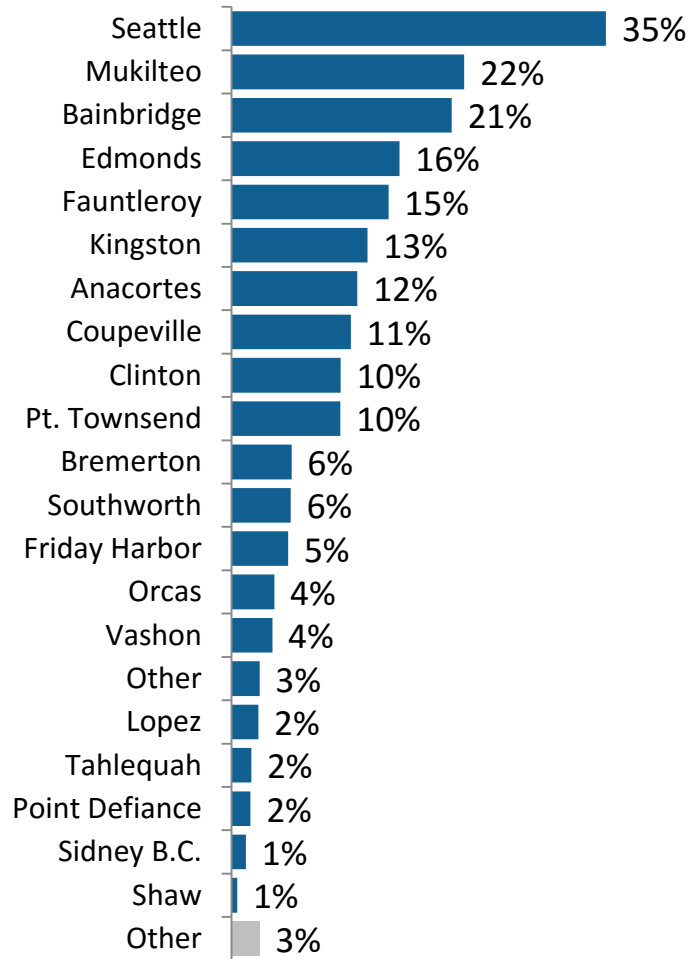


Q77. How much do you agree or disagree with the statement? (n=4,826)

Which Terminals to Enlarge



Seattle, Mukilteo, and Bainbridge are the most frequently mentioned ferry terminals that need to be enlarged and /or redesigned.

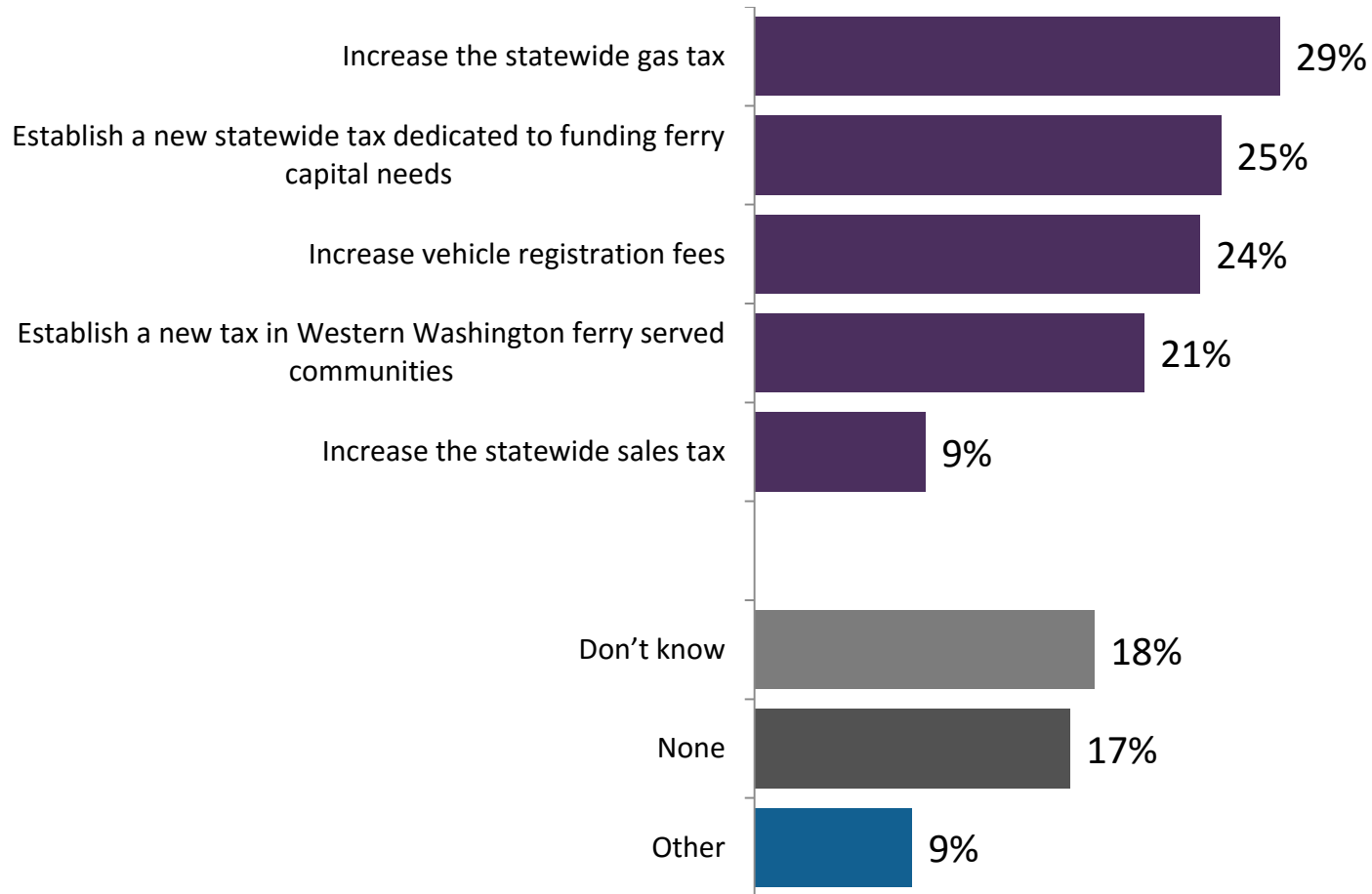


Q78. Which ferry terminals need to be enlarged and/or redesigned to provide more efficient service? (Multiple Response, n=2,652)

Suggested Funding Methods



Among the items offered, increasing the statewide gas tax was the top selected method of funding capital needs (29%), followed closely by establishing a new statewide tax dedicated to funding ferry capital needs (25%) and increasing vehicle registrations fees (24%). A plurality (44%) said they either didn't know, other, or selected none as an option.



Q79. Which of the following funding methods, if any, would you recommend be used to fund the capital needs of the ferries? (Multiple Response, n=4,825)

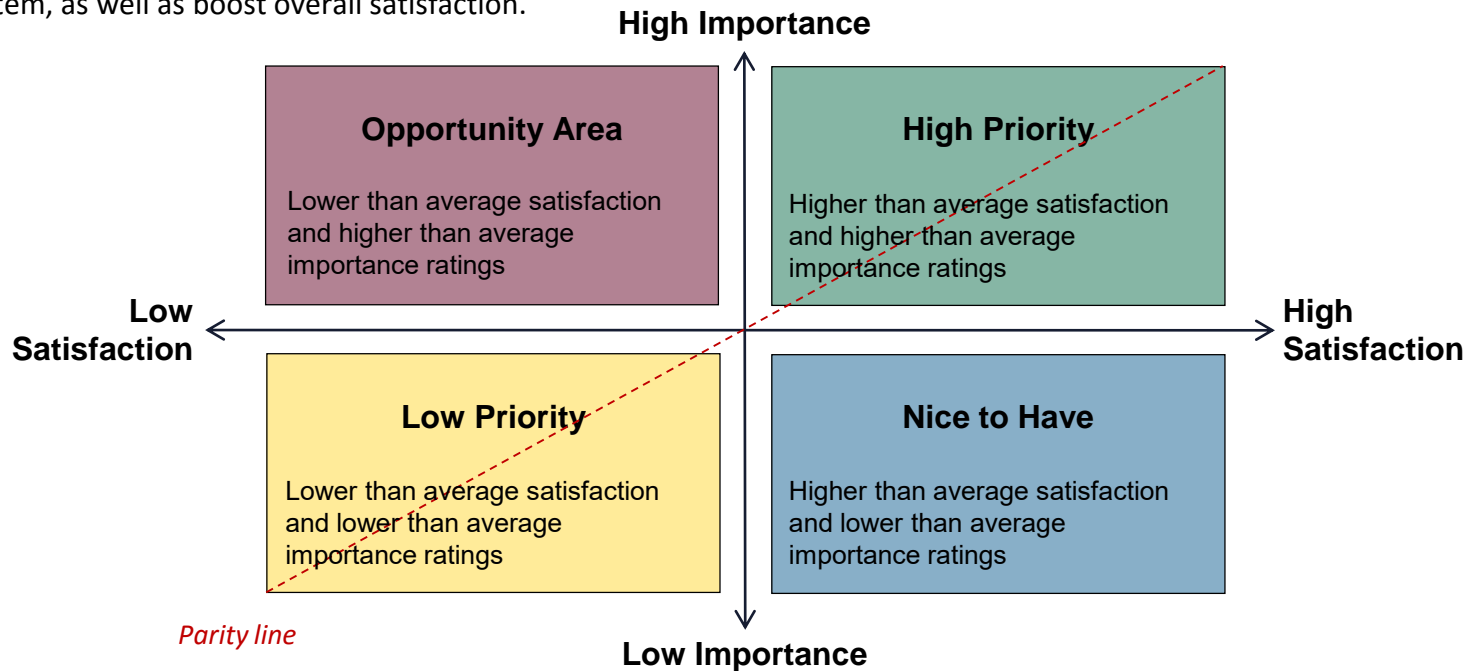


Ferry Attributes

Gap Analysis



- ❖ The following slides present quadrant charts outlining the relative importance of each ferry attribute and the relative satisfaction of each attribute.
 - The two sample sizes shown on each chart represent the maximum and minimum number of riders rating any given attribute, due to embedded skip logic.
- ❖ Each quad chart consists of four quadrants:
 - Opportunity area (red) | High priority (green) | Nice to have (blue) | Low priority (yellow)
- ❖ Each quad chart is also overlaid with a parity line.
 - The parity line represents where importance and satisfaction is equal, and identifies the ferry attributes with the greatest disparity between satisfaction and importance.
- ❖ Attributes considered highly important, but with low satisfaction (performance), indicate opportunity areas for improvement by WSF. Increasing awareness of these important attributes may help promote more positive impressions of the ferry system, as well as boost overall satisfaction.

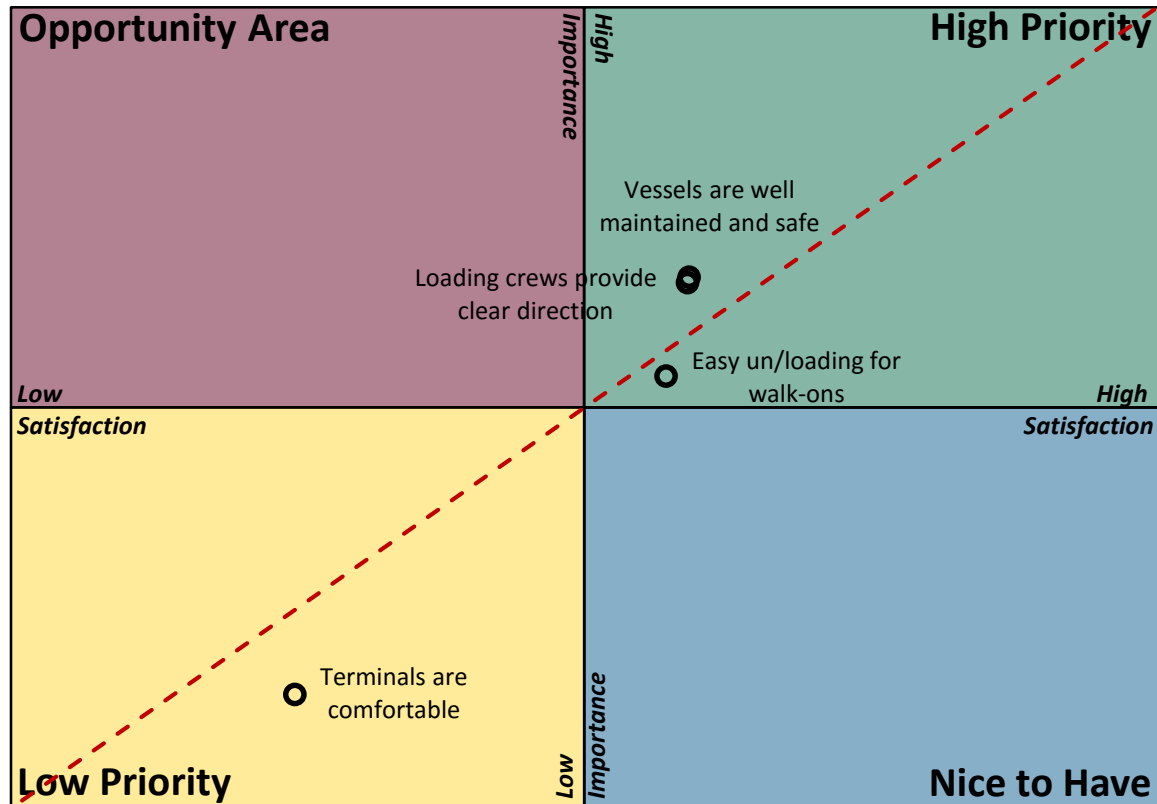


Gap Analysis: Overall



While there are no opportunity areas overall, loading crews providing clear directions, vessels are well maintained and safe, and easy unloading and loading for walk-ons are the three highest priority attributes for summer respondents.

Satisfaction vs. Importance Ratings (n=2620 - 4535)



Terminals are comfortable



Dissatisfaction of terminals comfortable is highest among Seattle/Bainbridge Routes and Seattle/Bremerton and Anacortes/SJI.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		3,137	639	243	26	280	201	101	16	217	409	911	45	49
Terminals are comfortable (2016)	Imp. (4-5)	65%	76%	70%	68%	54%	58%	65%	73%	60%	60%	58%	48%	33%
	Sat. (4-5)	47%	39%	43%	51%	53%	57%	53%	64%	57%	57%	39%	60%	32%
	Dissat. (1-2)	16%	24%	25%	9%	9%	8%	4%	4%	6%	7%	24%	5%	14%
2014	Dissat.	17%	23%	18%	3%	13%	11%	14%	0%	10%	10%	26%	27%	3%
Change	Dissat.	-1%	+1%	+7%	+6%	-4%	-3%	-10%	+4%	-4%	-3%	-2%	-22%	+11%

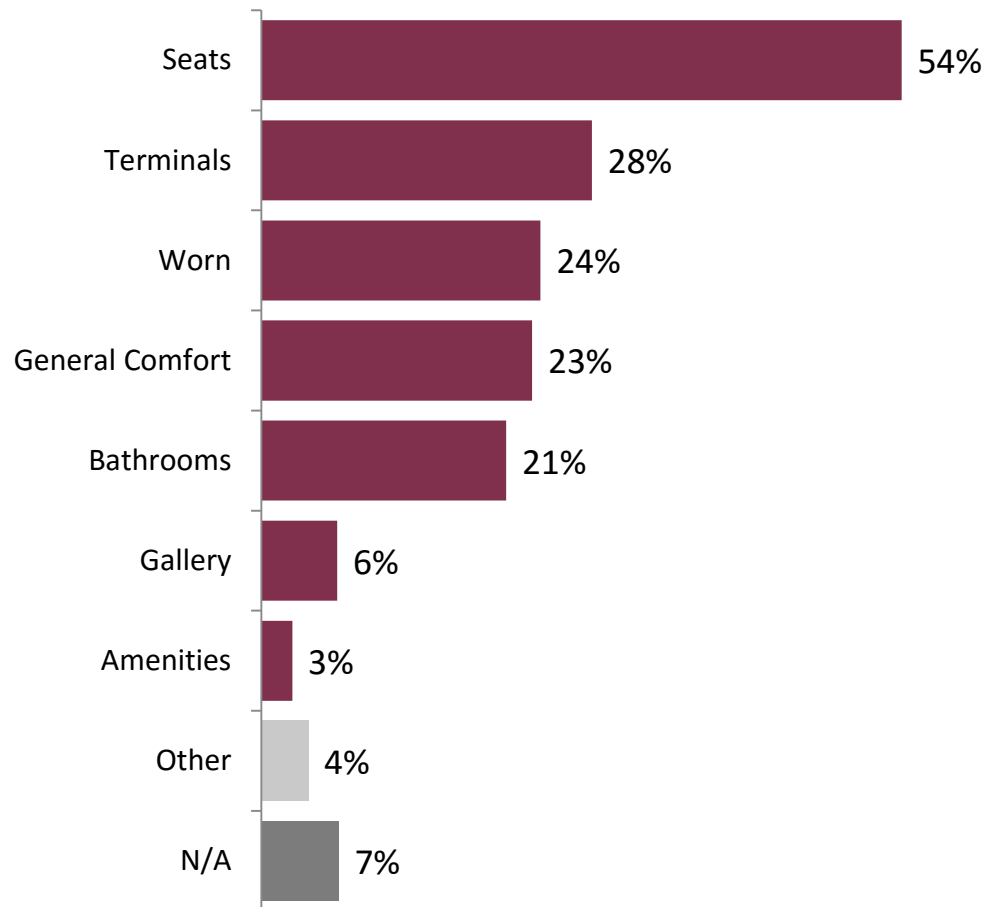
Top 3 Unsatisfactory Terminals	
Seattle	64%
Bainbridge	19%
Anacortes	15%

Example of Verbatim Complaints
Seattle - Dirty, uncomfortable seating, dirty bathroom.
Seattle - The seats in the waiting area near the turnstiles have ripped upholstery, and are dirty.
Seattle - Consistently either too hot or too cold.
Seattle - Not enough seating in Seattle terminal. Restrooms are poorly maintained.
Bainbridge - No comfortable seating. Concessions outside rather than inside.
Bainbridge - Very long walk on and off.
Anacortes - Very crowded and noisy. Very limited food selection.
Anacortes - The food service was not open, the seats are very uncomfortable. No tables for long waits.

Terminal Issues Mentioned



Seating is the top complaint among people who are dissatisfied.



Q42b. What specific conditions (about the terminal) made you dissatisfied? (Multiple Response, n=499)

WSF provides easy loading and unloading for walk-ons



Dissatisfaction is highest for Seattle Bainbridge, Seattle Bremerton, and Mukilteo Clinton.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		2,633	604	227	31	269	157	86	14	135	397	631	52	30
WSF provides easy loading and unloading for walk-ons (2016)	Imp. (4-5)	89%	91%	94%	77%	87%	85%	90%	100%	87%	85%	84%	82%	74%
	Sat. (4-5)	64%	55%	63%	67%	76%	84%	74%	70%	75%	59%	70%	79%	54%
	Dissat. (1-2)	14%	21%	16%	10%	6%	7%	10%	0%	5%	15%	8%	5%	4%
2014	Dissat.	12%	16%	14%	5%	5%	8%	8%	9%	5%	15%	10%	12%	5%
Change	Dissat.	+2%	+5%	+2%	+5%	+1	-1%	+2%	-9%	0%	0%	-2%	-7%	-1%

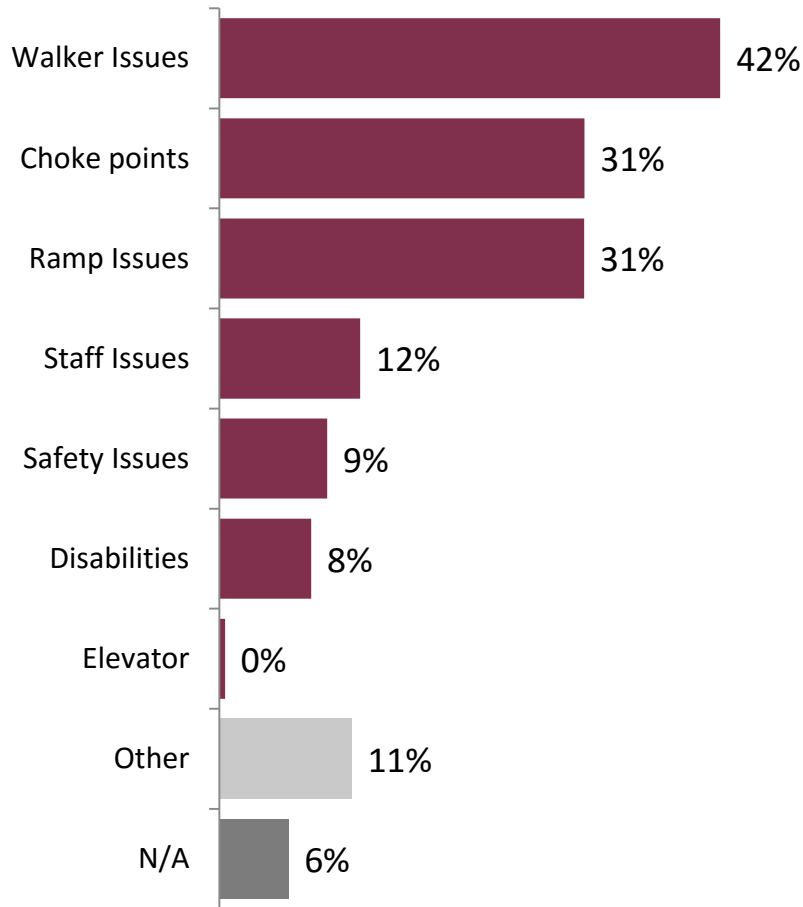
Top 3 Unsatisfactory Terminals	
Seattle	55%
Bainbridge	27%
Bremerton	13%

Example of Verbatim Complaints
Seattle - Having the gate partially closed creates TERRIBLE traffic flow. REALLY unnecessary. PLEASE open it up all the way.
Seattle - People block the walkway when exiting the ferry due to heavy lines. When boarding the ferry, the gate is partially closed and this slows everyone up.
Seattle - Unfriendly and often overcrowded. Not 'commuter friendly'.
Bainbridge - Line cutting when loading at Bainbridge - it reinforces a negative sense in the local culture.
Bainbridge - Crowded, lame transit area, long ass walk to get to the boat.
Bainbridge - It is a very poorly designed Rube Goldberg walk ramp.
Mukilteo - Awkward turn stiles. Corral is inadequate...tight waiting area.
Mukilteo - Occasionally walk on passengers have to wait on the dock until cars load to save time because ferries are behind schedule.

Walk on Issues Mentioned



The loading and unloading of walk on passengers is the top complaint among people who are dissatisfied.



Q46c. What specific (walk on) conditions made you dissatisfied? (Multiple Response, n=324)

WSF loading crews provide clear directions / hand signals



Dissatisfaction with WSF loading crews provide clear directions is highest in Point Defiance/Tahlequah , Fautleroy/Vashon, and Interisland.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		4,501	667	228	47	451	250	153	16	322	649	1,555	75	88
WSF loading crews provide clear directions/ hand signals (2016)	Imp. (4-5)	94%	94%	91%	95%	93%	96%	95%	100%	93%	94%	92%	97%	87%
	Sat. (4-5)	69%	72%	74%	59%	76%	55%	64%	76%	72%	62%	65%	70%	84%
	Dissat. (1-2)	11%	9%	8%	20%	8%	17%	15%	6%	9%	14%	13%	22%	2%
2014	Dissat.	15%	11%	10%	23%	12%	26%	21%	18%	9%	16%	24%	27%	3%
Change	Dissat.	-4%	-2%	-2%	-3%	-4%	-9%	-6%	-12%	0%	-2%	-11%	-5%	-1%

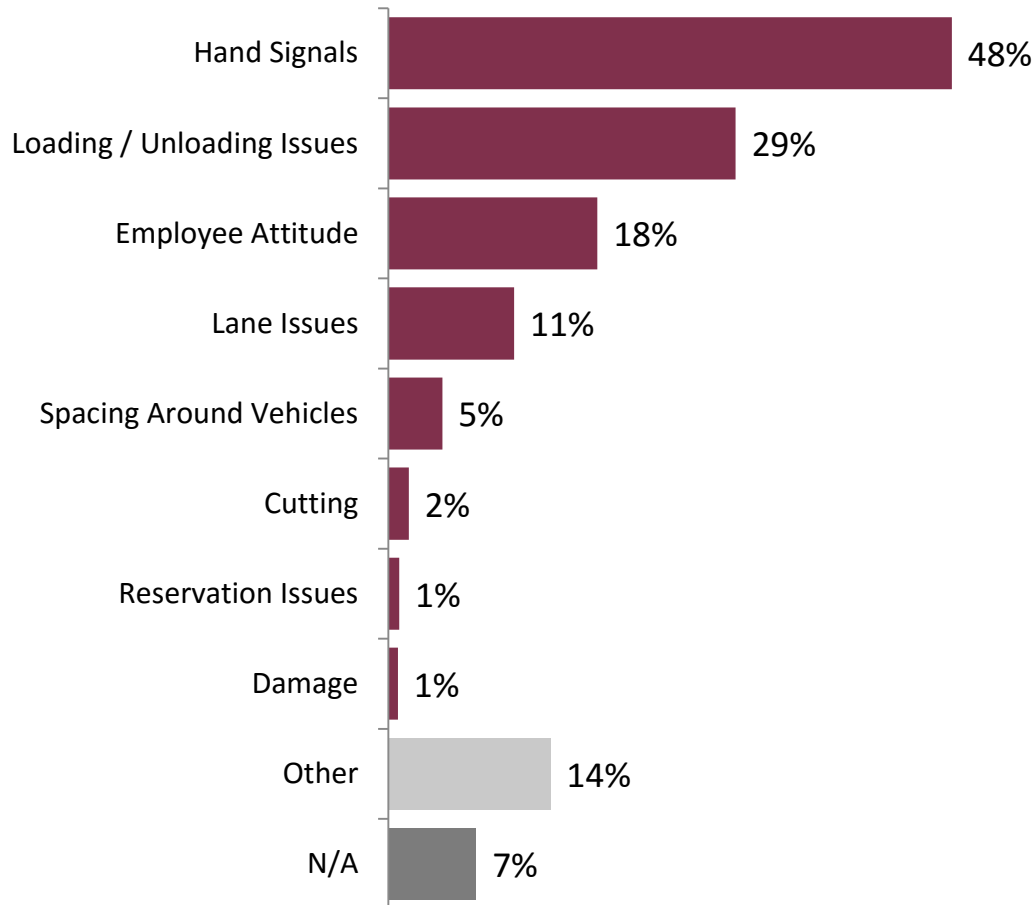
Top 3 Unsatisfactory Terminals	
Seattle	24%
Mukilteo	20%
Fautleroy	16%

Example of Verbatim Complaints
Seattle - Crews do not help first time drivers understand proper loading or unloading. So it takes way too long.
Seattle - Long lines, slow, cashiers too chatty and slow the swift movement of cars into the staging area.
Seattle - Parking staff have ZERO tolerance if any drivers do not understand their confusing and always changing systems of parking and loading; very often heard them scream at and call drivers names that don't understand the instructions.
Seattle - Crews do not help first time drivers understand proper loading or unloading. So it takes way too long.
Seattle - Long lines, slow, cashiers too chatty and slow the swift movement of cars into the staging area.
Mukilteo – It's a mess! Not sure what else can be done! I sure hope the new terminal has a walk on only ramp! Need on in Clinton as well.
Mukilteo - The crews cannot manage the people, cars, park traffic, train traffic. Loading gets all messed up due to the congestion, and the boats end up 25 minutes late. 5 busses come down the hill, and the boat leaves, stranding 100 walk- ons in a 30 square foot.
Fautleroy - Must have an excellent state patrol at Fautleroy.

Vehicle Loading Issues Mentioned



The Employees giving hand signals are the top complaint among people who are dissatisfied.



Q51d. What specific (vehicle loading) conditions made you dissatisfied? (Multiple Response, n=531)

WSF Vessels are well maintained and safe



Dissatisfaction with WSF vessels well maintained and safe is highest in Seattle/Bremerton.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Sat. Respondents		4,535	714	281	46	440	243	146	20	306	619	1558	75	87
WSF Vessels are well maintained and safe (2016)	Imp. (4-5)	94%	95%	92%	93%	93%	91%	95%	96%	94%	95%	95%	89%	95%
	Sat. (4-5)	67%	62%	48%	76%	68%	76%	72%	76%	78%	80%	62%	72%	69%
	Dissat. (1-2)	11%	12%	26%	8%	12%	3%	4%	7%	5%	4%	15%	10%	10%
2014	Dissat.	13%	14%	23%	5%	8%	8%	14%	7%	6%	6%	24%	31%	34%
Change	Dissat.	-2%	-2%	+3%	+3%	+4%	-5%	-10%	0%	-1%	-2%	-9%	-21%	-24%

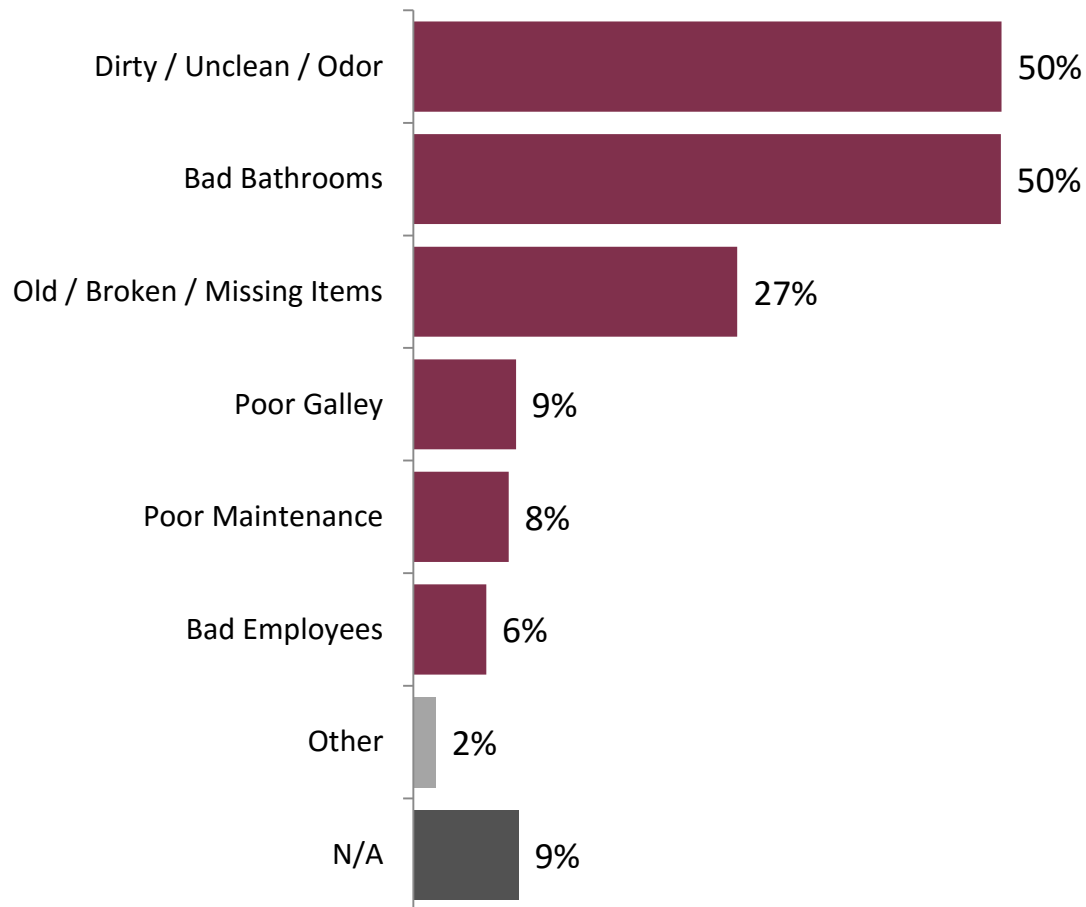
Top 4 Unsatisfactory Vessels	
Don't recall name	39%
Wenatchee	17%
Hyak	17%
Puyallup	16%

Example of Verbatim Complaints
Wenatchee - Bathrooms are poorly cleaned, sometimes toilet tissue is empty, towels empty, sink faucets not working; dirty stalls; doors not latching properly.
Wenatchee - Boats are all showing signs of wear and tear not to mention breaking down.
Hyak - Gross soil of boats - tables/booths/floors/bathrooms - ugh! And the staff is almost always standing around talking and doing nothing that looks like maintenance.
Puyallup - Unclean. Dirty bathrooms.
Walla Walla - Sometimes the toilets won't flush.
Tacoma - Tables and seats are almost always dirty (food scraps and crumbs).

Vessel Issues Mentioned



General dirty unclean and Bathrooms are the top complaints among people who are dissatisfied.



Q59c. What specific (vessel) conditions made you dissatisfied? (Multiple Response, n=476)

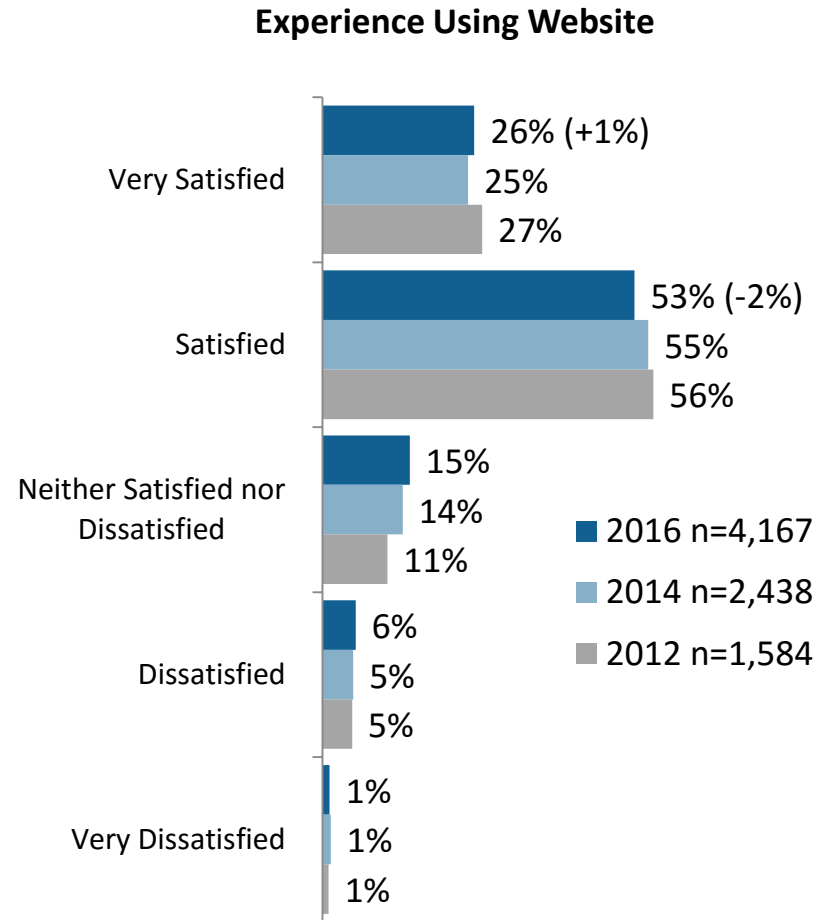
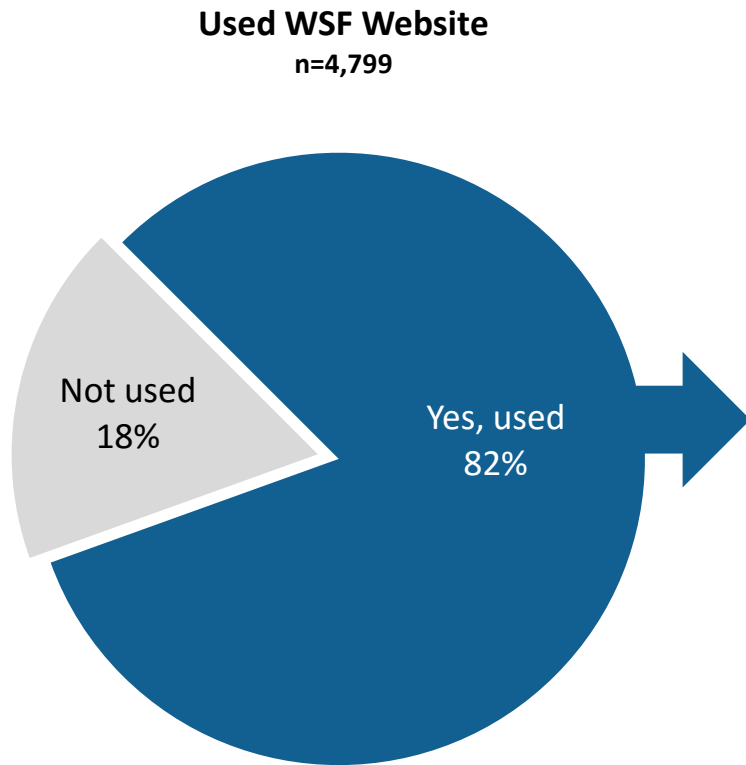


Web and Phone Satisfaction Issues

Using WSF Website



More than three quarters of summer respondents have used the WSF website for some reason and almost all say they are satisfied with their experience.



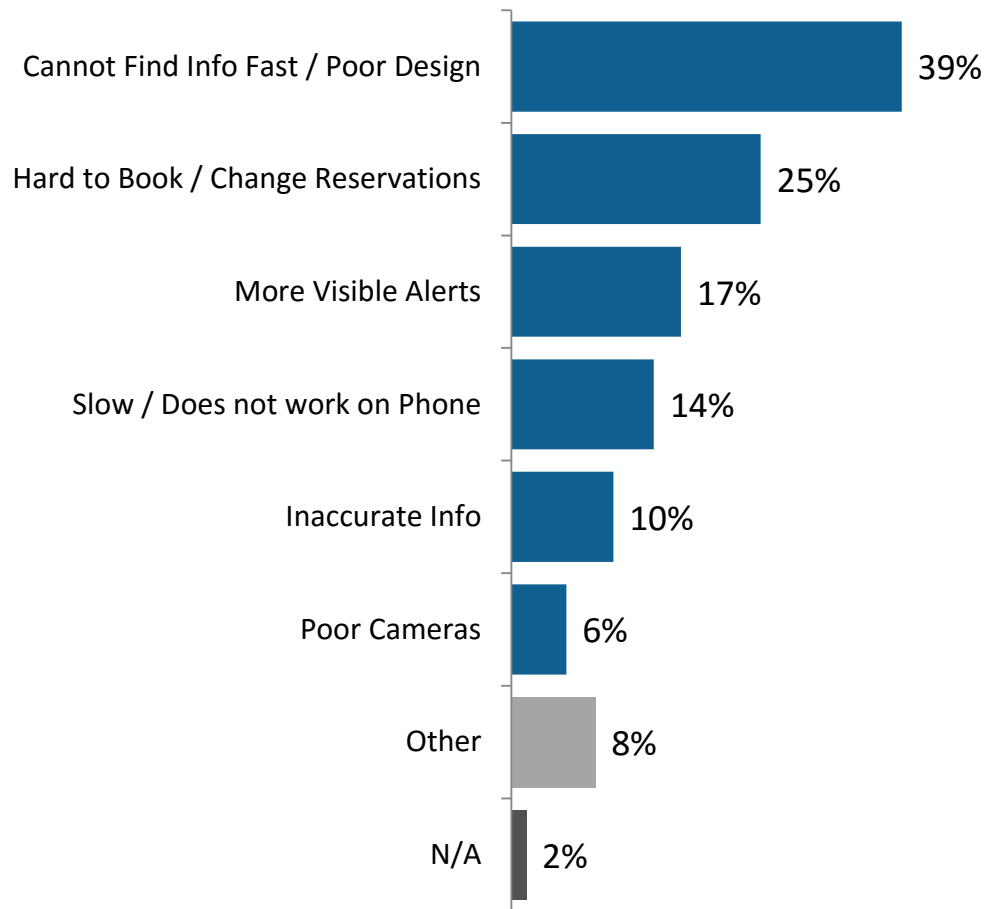
Q65. have you for any reason used the WSF website?

Q66. How satisfied were you with your experience using the WSF website?

Website Issues Mentioned



The ability to find information and hard to book or change reservations were the top mentioned issues



Q67. What specifically about your experience with the WSF website made you dissatisfied? Please be as specific as possible. (n=349)

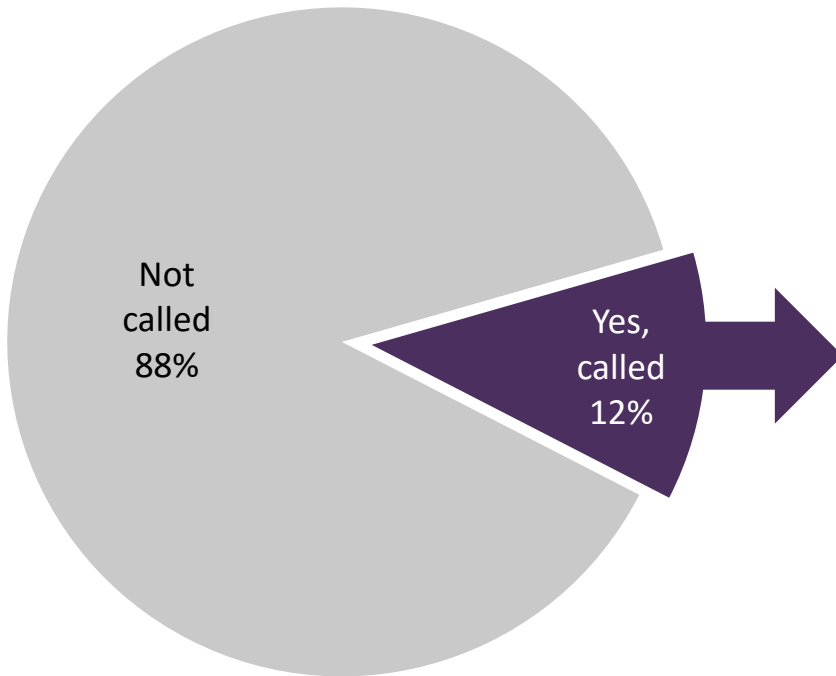
Calling WSF Customer Service by Phone



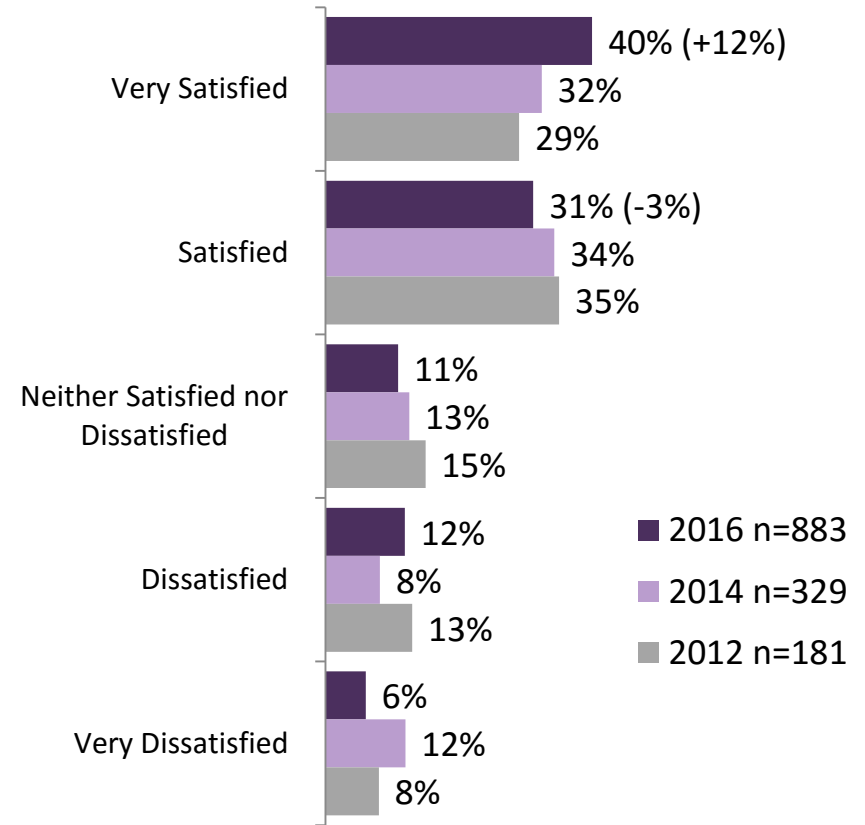
Very few respondents have contacted WSF customer service by phone. Of those respondents saying they have called, the majority are satisfied with their experience.

Called WSF Customer Service

n=4,798



Experience Calling WSF



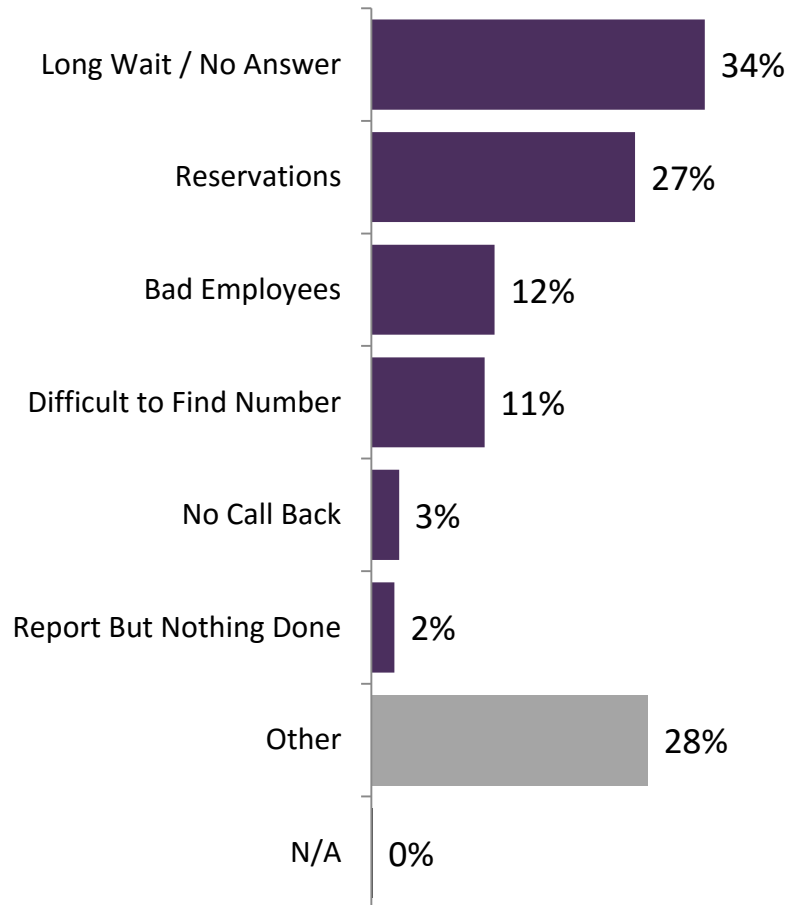
Q65B. During the Summer (June 12th through September 17th) period, have you for any reason called WSF by phone?

Q68. How satisfied were you with your experience calling the WSF by phone?

Phone Issues Mentioned



No answer or long wait times and issues around reservations topped the list of phone complaints among people who are dissatisfied.



Q69. What specifically about your experience calling WSF by phone made you dissatisfied? (Multiple Response, n=133)



Questions & Answers



THANK YOU!

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