



# Washington State Transportation Commission 2018 WSF Customer Research Consolidated Report Summary of Findings

# Preface



The following is the process Washington State Transportation Commission (WSTC) has used to conduct research regarding Washington State Ferries (WSF):

Before 2010, stand-alone research projects were executed, but given the longitudinal nature (changes over time) of the issues, WSTC made the decision to create the Ferry Riders' Opinion Group (FROG) and Voice of Washington State (VOWS) panels. FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys. VOWS is an online community where any Washington resident had a similar opportunity to weigh in on statewide and regional transportation issues. VOWS was discontinued by the legislature in 2017 and last used in 2018. The FROG panel has been supplemented with on-board surveys of summer recreational and occasional riders to gather input from out-of-area, out-of-state, and local ferry riders who are not part of the FROG panel. The FROG panel currently has roughly 27,000 members with 18,500 having done 1 or more surveys since 2010.

The WSF customer research initiative in 2018-2019 consists of the following main phases:

- **Winter 2018 Performance & Customer Service 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 and Recreational Study** (target audience: commuter and social/recreational riders)
- **WSF Policy Study** (target audience: commuter riders) via FROG
- **Winter 2019 Performance & Customer Service Study** (target audience: commuter riders) via FROG (not in this report)

The focus of this consolidated report is to provide a summary of the 2018-19 WSF customer research initiative.

The detailed individual study reports/presentation can be found on the Washington State Transportation Commission website at: <http://wstc.wa.gov/> ; Please call the commission offices at: (306) 705-7070 for other study documents.

# Key Take-Aways



- ▶ Overall satisfaction (76%) with the service provided by WSF is strong and has remained constant for the last 5 years. Overall dissatisfaction increased 1 percentage point in 2018 to 16%.
- ▶ Winter 2018 dissatisfaction for each individual attribute is largely unchanged except for “terminals are comfortable” where dissatisfaction grew by 6 percentage points.
- ▶ Summer 2018 dissatisfied has increased 6% points to 31% of all summer FROG riders, highest on the San Juan Interisland (45%), Fauntleroy/Vashon (44%), and Point Defiance/Tahlequah (39%) routes.
- ▶ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (89%) and Puget Sound tourism (90%).
- ▶ The majority of the WSF reservation system users (79%) are satisfied with the system (11% dissatisfied).
- ▶ Importantly, ferry fares as a percentage of the total recreational trip cost has declined for both FROG panel members and occasional riders.
- ▶ Just over half (55%) of the current reservation users said the no-show fees should be raised from the current \$10 to \$17 to cut down on multiple reservations.
- ▶ When asked about WSF developing a reservation system for the Central Puget Sound routes, thirty-six percent of riders on those routes would support it, while 41% would oppose it.
- ▶ Riders system-wide would be willing to increase the current \$0.25/ticket ferry surcharge and pay, on average \$0.59 per ticket provided the funds continue to be dedicated to new ferries.



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# Executive Summary By Survey

# Executive Summary – Travel Habits



## WINTER / SUMMER RIDERSHIP TRAVEL HABITS

- ▶ The Coupeville/Port Townsend and Anacortes/San Juan routes experience the most change between winter and summer travel periods (both up 8 percentage points in ridership winter to summer periods).
- ▶ Boarding method shows only a small shift away from vehicle drive-on to walk-on between winter and summer.
- ▶ All routes saw a change in the trip purpose from more commuting in the winter to more recreational in the summer seasons. The least likely to see a change is the Seattle/Bainbridge route.
- ▶ All routes except Coupeville/Pt. Townsend, Anacortes/San Juan Islands, and Point Defiance/Tahlequah are primarily used for commuting during the winter period. Anacortes/San Juan has a high percentage of “other” winter trips (shopping, medical appointments, etc.).
- ▶ The average number of summer trips per month ranges from 1.3 per rider for Anacortes/Sidney (average is 1-2 trips per rider for heavy recreational routes) to 7.5 per rider for Fautleroy/Vashon (average is 5-6 trips per rider for heavy commuter routes) during the summer period.
- ▶ Seattle/Bremerton (63%), Seattle/Bainbridge (57%) and Southworth/Vashon (52%) have the highest proportion of summer walk-on travelers; on all other routes, drive-on has a majority percentage.
- ▶ Anacortes/Sidney B.C. (95%), Coupeville/Pt. Townsend (83%), and Anacortes/San Juan Island (73%) have significantly more summer riders than other routes, saying their ride was for recreational/social purposes.

# Executive Summary - Performance



## WINTER PERFORMANCE / CUSTOMER SERVICE: RIDERS

- ▶ Winter 2018 dissatisfaction for each individual attribute is largely unchanged when compared to 2017/16 except for “terminals are comfortable” where dissatisfaction grew by 6 percentage points.
- ▶ Overall winter dissatisfaction remains highest in 2018, for “adequate parking near terminals” (30%), “terminals are comfortable” (23%) and “terminal bathrooms are clean” (21%).
- ▶ As in 2017/16, the greatest opportunity for winter 2018 was to improve rider satisfaction system wide for “terminal bathroom cleanliness” and “clear loading crew directions.”
- ▶ Winter dissatisfaction is highest regarding “clean and well maintained terminal bathrooms” in Seattle (35% of Seattle/Bainbridge and 32% of Seattle/Bremerton riders report dissatisfaction).
- ▶ One in five (20%) winter vehicle drivers say hand signals are somewhat (13%) or very (7%) inconsistent between crews.
- ▶ About one-in-fourteen (7%) winter riders have contacted WSF customer service by phone and most (79%) are satisfied with their experience.
- ▶ About one in two winter riders have used the WSF reservation system (47% in both 2018 & 2017 vs. 34% in 2016) and the majority are satisfied with their experience (87% in 2018 up from 84% in 2017).
- ▶ “No space available” (21%) and “website issues” (19%) are the dominate reasons for dissatisfaction.

# Executive Summary - Freight



## FREIGHT COMPANY DECISION-MAKERS EVALUATION OF WSF

- ▶ More than half of freight customers (57%) use WSF at least weekly, similar to 2016 (52%). The average number of one-way trips per month by all freight companies is 15.8, similar to 2016 (15.3).
- ▶ About half (45%) of freight customers do see a seasonal difference between October-March versus April-September in the average number of ferry crossings made by their trucks.
- ▶ Freight trips are skewed towards peak hours (71%), with few freight trips at night (9%). Edmonds/Kingston (25%) and Anacortes/San Juan (24%) are the most used routes, followed by Mukilteo/Clinton (18%) and Fautleroy/Vashon (11%).
- ▶ The majority of freight companies (63%) say their current frequency of ferry use has not changed, with a quarter (28%) increasing and 9% (n=9) decreasing frequency. One-in-four (26%) freight companies anticipate their ferry usage will grow in the next 12 months with 5% saying it will shrink.
- ▶ Most freight companies (89%) say Washington State Ferries provides a good value. Overall, the perception of WSF as a good value has remained similar for both 2016 and 2014.
- ▶ Similar to 2016 (83%), over four-fifths (84%) of freight customers in 2018 are aware of WSF's vehicle reservation system, up from 72% in 2014.
- ▶ Of those freight customers who use the reservation system, most are satisfied (82% in 2018 compared to 89% in 2016 and 92% in 2014). One-in-ten (8% - 2018, 11% - 2016) are dissatisfied with WSF reservation system.

# Executive Summary – General Public



## GENERAL PUBLIC (STATEWIDE & PUGET SOUND BASIN) ATTITUDES TOWARDS WSF

- ▶ Approximately 9 in 10 state residents (96%) in 2018 have ridden a Washington State Ferry (WSF) at some point in their lives. As expected, residents living in westside communities in the Puget Sound (PS) basin have a considerably higher travel frequency on WSF than residents living in eastside Puget Sound basin communities or in non-Puget Sound areas.
- ▶ Non-Puget Sound basin residents, like their Puget Sound basin eastside counterparts, use the ferries more for tourism/recreation (54%, 41%) and to see friends (19%, 25%) than their Puget Sound westside counterparts (15%, 14% respectively). Westside of Puget Sound respondents use the ferries for work (19%) more so than Puget Sound eastside (2%).
- ▶ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (89%) and Puget Sound tourism (90%). The perceived economic importance of WSF is only 4 percentage points higher in Puget Sound-East (90%) than non-Puget Sound (86%). The perceived importance of WSF to Puget Sound tourism for both the Puget Sound basin and non-Puget Sound residents is approximately nine out of ten.
- ▶ A slightly higher percent of Puget Sound residents in 2018 (76%) as in 2016 (72%) and 2014 (70%), feel that daily WSF operations should be paid for by a mix of rider's fares and general gas taxes. Non-Puget Sound residents in 2018 are more likely (41%) to say "riders only" should pay the daily operation costs than their Puget Sound counterparts (19%).
- ▶ Statewide, about seven in ten (69%) citizens say daily operations should be paid for by a mix (riders and non-riders) and that the rider portion/farebox of costs should be 63.3%.



## CURRENT RESERVATION PROGRAM SATISFACTION

- ▶ The majority of the 3,270 WSF reservation system users (79%) are satisfied with the system, with 11% being dissatisfied. This is similar to 2016 (79% Satisfied / 13% dissatisfied) but an improvement over 2015 (67% satisfied / 21% dissatisfied).
  - The percentage of very satisfied reservation users (49%) continues to be ten times as large as the percentage of very dissatisfied users (5%).
  - Broken out by last route used, the survey finds the riders on the Anacortes/Sidney (11%) and Port Townsend/Coupeville (9%) routes are less dissatisfied with the reservation system than those who last used the Anacortes/San Juan Islands route (16%).
  - Broken out by San Juan County residency, riders living on Orcas (21%) are the most dissatisfied followed by San Juan Island (19%) and Lopez (16%).
  - Similar to 2016 and 2015, completing or not completing their reservation with a problem does not appear to drive dissatisfaction as 49% of those dissatisfied with the reservation system had no problems completing their reservation(s).
- ▶ Of the 418 riders who are dissatisfied, the most cited: “Reservations are Hard to Use” (30%) and “Program is Frustrating” (22%) followed by “Favors Tourists Over Locals” (15%).
  - The most often mentioned needed change is to “Make Reservation Program Functionality Better” (28%) and “Give Priority To Locals” (12%). Eleven percent (11%) of the dissatisfied say to “Kill The Reservation Program.”
  - Full time San Juan residents’ most often mentioned needed change is to “Give Priority To Locals” (32%) followed by “Make Reservation Program Functionality Better” (19%) and “Kill The Reservation Program” (13%).



## RECREATIONAL AND SOCIAL TRAVEL PATTERN

- ▶ The vast majority of riders' most recent recreational/social trips were in September, with Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton the top three last recreational routes ridden both in 2018 and 2016.
- ▶ The majority (73%) of summer recreational riders boarded as either a vehicle driver or passenger. Of those that drove on, seven in ten (71%) boarded in a mid sized auto/SUV/pick-up (14-22 feet).
- ▶ Walk-on riders account for one in five (23%) of all recreational riders in both 2018 and 2016. Walk-on ridership is highest on the Seattle/Bremerton route (56%).
- ▶ Round trip on the same ferry route is the most popular crossing method for both panel (80%) and occasional (65%) recreational riders. Anacortes/San Juan (5.3 days) and Anacortes/Sidney (5.1 days) continue to have the longest mean recreational trip duration with Seattle/Bremerton (1.5 days) the least.
- ▶ Ferry fares as a percent of total recreational/social trip cost is significantly higher for FROG panel members than for non-FROG respondents (those occasional recreational riders intercepted on-board). Importantly, the ferry fare as a percentage of the total trip costs has declined since 2016 for both FROG panel members and occasional riders.
- ▶ Almost all respondents, both FROG panel (87%) and occasional riders (85%) say they are likely to use WSF again for their next recreational or social trip. "Better schedules/routes" (51%) and "fix up terminals/boats" (34%) are the top two mentioned ways to increase the number of recreational or social trips in the future.



## SUMMER RIDERS' PERFORMANCE ASSESSMENT

- ▶ The percentage of summer riders saying they are satisfied with the level of service provided by WSF during the summer months has slightly declined overall compared to 2016 (62% vs. 64%). Onboard survey respondents are more satisfied by a 28 point margin (90% satisfied).
- ▶ Those dissatisfied has increased 6% points since 2016 to 31% of all summer FROG riders with dissatisfaction highest on the San Juan Interisland (45%), Fauntleroy/Vashon (44%), and Point Defiance/Tahlequah (39%) routes.
- ▶ The percentage of summer riders saying WSF is a “good” or “very good” value in the summer period has increased compared to 2016 (81% vs.72%). Overall good value is up from summer 2016 across all routes except Southworth/Fauntleroy, Fauntleroy/Vashon, and San Juan Interisland.
- ▶ Summer dissatisfaction with terminal comfort is highest among Seattle/Bainbridge (48%), Seattle/Bremerton (44%), Anacortes/SJI (25%), and Edmonds/Kingston (20%) routes.
- ▶ Summer dissatisfaction with “WSF loading crews provide clear directions” is highest on Point Defiance/Tahlequah (24%), Fauntleroy/Vashon (20%), and Interisland (25%) routes.



## RIDERS' REACTIONS TO POTENTIAL CHANGES IN WSF POLICIES

### Changes in Reservation No Show Fees:

- ▶ Just over half (55%) of the 3,270 current reservation users said the no-show fees should be raised from the current \$10 to \$17 to cut down on multiple reservations.
  - Visitors to San Juan Islands (57%) are more likely to say increase the no-show fees than either part time residents (54%) or full time San Juan Islands residents (39%).

### Freight Companies' Reactions to Possible Congestion Pricing:

- ▶ About half of freight customers (48%) who travel in peak times say they would move trips to off-peak times if they were charged 3 times the current freight vehicle fare. This is also similar to 2016 (42%).
- ▶ One-in-five of all freight customers (22%) say they would move trips to overnight if fares were cut in half for that time period. Most freight customers (79% - 2018, 82% - 2016) say a secure arrival side parking area would not make them more likely to schedule ½-priced late-night ferry sailings.

### Capital Funding Source Preference by General Public and Puget Sound Basin Residence:

- ▶ Statewide residents are roughly divided when it comes to who should pay for capital investments (Everyone – 31%, PS Residents – 38%, Ferry Riders – 26%). Seven in ten (69%) statewide citizens feel that WSF should get the same level of funding as road/bridges.

# Executive Summary



## Travel Changes: Fare Increases on Anacortes/Sidney B.C Route:

- ▶ Riders who have taken or are likely to take the Anacortes/Sidney BC route were asked if they would take the trip under the current fare structure versus if fares were increased by 10% and 25%.
  - Five percent (5%) said they would “most likely not take the trip” even at the current fare levels.
  - When fares are increased by 10%, 13% of respondents say they most likely will not take the trip, and when fares are increased by 25%, 32% say they most likely will not take the trip.

## Possible Central Puget Sound Reservation Program:

- ▶ Thirty-six percent of central Puget Sound route users would support, while 41% would oppose, WSF implementing a reservation system for Central Puget Sound routes.
- ▶ When given three options for implementing central Puget Sound reservations, 33% of central PS users selected “have reservations only for Friday afternoon through Sunday sailings (weekends only).”
  - 20% would put reservations on all sailings.
  - 21% gave alternatives, a lot of which included “reservations will not work” and “don’t do reservations at all.”
- ▶ When given two options for reservation management, 38% of central Puget Sound users selected the current tiered release (which is two months ahead of any individual travel/sailing day, 30% of the space becomes available for reservations; two weeks prior to any individual travel day, an additional 30% becomes available; the remaining 30% becomes available two days prior to the travel day and 10% is not reservable) program.



## **Freight Decision-makers: Views on Possible Central Puget Sound Reservation Expansion:**

- ▶ Of those freight customers who use Central Puget Sound ferry routes (sample of 72 in 2018 and 75 in 2016), two thirds (62% in 2018, 63% in 2016) would not change their ferry usage given a potential Central Puget Sound reservation system. About one-in-seven (15% in 2018, 16% in 2016) would increase usage with a Central Puget Sound reservation system in place.
- ▶ Of those freight company's who would be open to a vehicle reservation system for Central Puget Sound routes (n=72), similar to 2016 (54%), over half (58%) in 2018 say they would be likely to use the system as described with a 25% deposit.
- ▶ Almost four-in-ten (41%) freight companies say charging 20% more for reservations, but only requiring trucks show-up 10 minutes instead of 30 minutes prior to sailing, would make some difference in their likelihood to use the system.

## **Lopez/Shaw Eastbound Travels – Currently No Reservations Offered:**

- ▶ 59% of the 618 riders who travelled to/from Lopez/Shaw islands said they would favor WSF offering Eastbound reservations.
  - 60% of those who travelled to/from Lopez/Shaw islands say they are negatively impacted on their eastbound travel for those islands.

# Executive Summary



## Ferry Funding Issues:

- ▶ When asked to select a preferred funding source for long-term capital needs from a list of options, “Establishing a new tax in Western Washington ferry served communities” (26%) and “Increase the statewide gas tax” (25%) received the most mentions. They are followed by “Establish a new statewide tax dedicated to funding ferry capital needs” (23%) and “Increase vehicle registration fees” (21%).
- ▶ Without any further information, riders system-wide would be willing to increase the current \$0.25/ticket ferry surcharge and pay, on average \$0.59 per ticket provided the funds continue to be dedicated to new ferries.
- ▶ After reading a short statement about what the current \$0.25 surcharge raises and the cost of a new 144 class ferry, riders systemwide would on average be willing to pay a surcharge of \$0.73 per ticket provided the funds continue to be dedicated to new ferries.

## Impact Of Passenger To Vehicle Fare Increase Differential:

- ▶ One in four (23%) riders systemwide feel the impact of lower increases in passenger fares has encouraged their walk-on behavior.

## Potential Amenities Desired:

- ▶ The 5,141 riders ranked thirteen potential amenities from top priority to do not care about it. The top three highest ranked potential amenities systemwide were “free Wi-Fi” (49% gave it a top-priority or high-priority rating), “park & ride lots” (41% top/high priority) and “designated terminal pickup / drop-off area” (39% top/high priority).



# Study Background & Methodology

# Study Background



The Washington State Transportation Commission (WSTC) has been conducting surveys of ferry riders of Washington State Ferries since 2008. The initial 2008 surveys were done with paper questionnaires passed out on the boats. The commission found that many of the issues facing ferry operations were of a longitudinal nature (changes over time) and in 2010 created the Ferry Rider's Opinion Group (FROG) online panel. This online community allowed ferry travelers an ongoing opportunity to weigh in on ferry issues through web based surveys. The FROG panel has been used as the main source for WSF policy and performance surveys since. The FROG panel has been supplemented with on-board surveys of summer recreational and occasional riders to gather input from out-of-area, out-of-state, and local ferry riders who are not part of the FROG panel. The FROG panel currently has roughly 27,000 members with 18,500 having done 1 or more surveys since 2010.

The following laws direct the Washington State Transportation Commission's ferry rider surveys:

## **RCW 47.60.286**

- 1) The commission shall, with the involvement of the department, conduct a survey to gather data on ferry users to help inform level of service, operational, pricing, planning, and investment decisions. The survey must include, but is not limited to:
  - (a) Recreational use;
  - (b) Walk-on Customer Usage;
  - (c) Vehicle Customer Usage
  - (d) Freight and goods movement demand; and
  - (e) Reactions to potential operational strategies and pricing policies described under RCW 47.60.327 and 47.60.290.
- 2) The commission shall develop the survey after providing an opportunity for ferry advisory committees to offer input.
- 3) The survey must be updated at least every two years and maintained to support the development and implementation of adaptive management of ferry services.

# Study Background



## RCW 47.64.355

Performance targets must be established by an ad hoc committee with members from and designated by the office of the governor, which must include at least one member from labor. The committee may not consist of more than eleven members. By December 31, 2011, the committee shall present performance targets to the representatives of the legislative transportation committees and the joint transportation committee for review of the performance measures listed under this section. The committee may also develop performance measures in addition to the following:

- 1) Safety performance as measured by passenger injuries per one million passenger miles and by injuries per ten thousand revenue service hours that are recordable by standards of the federal occupational safety and health administration and related to standard operating procedures;
- 2) **Service effectiveness measures including, but not limited to, passenger satisfaction of interactions with ferry employees, cleanliness and comfort of vessels and terminals, and satisfactory response to requests for assistance. Passenger satisfaction must be measured by an evaluation that is created by a contracted market research company and conducted by the Washington State Transportation Commission as part of the Ferry Riders' Opinion Group survey. The Washington State Transportation Commission shall, to the extent possible, integrate the passenger satisfaction evaluation into the ferry user data survey described in RCW 47.60.286;**
- 3) Cost-containment measures including, but not limited to, operating cost per passenger mile, operating cost per revenue service mile, discretionary overtime as a percentage of straight time, and gallons of fuel consumed per revenue service mile; and
- 4) Maintenance and capital program effectiveness measures including, but not limited to: Project delivery rate as measured by the number of projects completed on time and within the omnibus transportation appropriations act; vessel and terminal design and engineering costs as measured by a percentage of the total capital program, including measurement of the ongoing operating and maintenance costs; and total vessel out-of-service time.

The ad hoc committee described in subsection (1) of this section expires December 31, 2011.

# Methodology



The 2018-19 research initiative consisted of the following studies:

<b>Survey</b>	<b>Sample Universe</b>	<b>Completed Interviews</b>	<b>Interviewing Month</b>
Winter Rider Survey	FROG Panel Members	n=4,214	March-April 2018
Freight Shipper Survey	Freight Companies Using WSF	n= 100	May 2018
General Public Survey	VOWS Panel Members	n=5,419	June 2018
Spring Reservation Survey	FROG Panel Members	n=4,988	July 2018
Summer Onboard Rider Survey	Ferry Riders Not in FROG Panel	n=7,810	August 2018
Summer Rider Survey	FROG Panel Members	n=4,925	October 2018
Winter Policy Survey	FROG Panel Members	n=5,141	January 2019
Winter Rider Survey	FROG Panel Members	(Not Yet Conducted)	March-April 2019

The objective of the 2018 survey research was to understand travel behavior, satisfaction with WSF performance on key attributes and opinions regarding key issues currently facing the state ferry system among key customers including: ferry riders who are part of the FROG panel, freight shippers who use WSF, infrequent WSF riders who are not part of the panel, users of the WSF reservation system, and the general statewide public. This overall objective resulted in the following main areas of exploration:

- Winter/Summer Rider satisfaction with WSF performance overall and on key attributes
- Winter/Summer Rider travel behavior and satisfaction
- Current and potential recreational usage of WSF
- Freight shipper’s usage and attitudes towards WSF
- Attitudes towards WSF held by the general public statewide
- Attitudes about the WSF reservation system

Data was analyzed and reported on by Research Assurance. More detailed information for each survey can be found in the technical reports that are posted on the WSTC web site: [www.wstc.wa.gov](http://www.wstc.wa.gov)



# Overview of Individual Survey Reports

# Overview of Individual Survey Reports



Results of each study are documented in detail in their own survey report posted on the WSTC web site, and are briefly outlined below.

## **Winter Rider Survey (FROG Panel)**

- An in-depth study of rider satisfaction was fielded at the end of the 2017 & 2018 winter travel period (both in late March). The 2018 study, based on 4,214 completed surveys conducted from March 26 to April 23, 2018, resulted in a detailed understanding of WSF performance at all levels of contact.

## **Freight Shipper Survey (Freight Shippers using WSF)**

- A general usage and satisfaction survey was conducted in May 2018 with freight shipping companies testing: WSF usage, value perception, congestion pricing, and reservation system opinions. A total of 100 executive level telephone interviews were conducted (between May 14 – June 1, 2018).

## **General Statewide Public Survey (Voice of Washington State (VOWS) Panel)**

- A study of the general public was conducted in June 2018 to gauge ferry ridership, trip purpose, importance of WSF to the state, capital funding issues, and fare recovery levels. A total of 5,419 completed surveys were collected via the VOWS statewide survey panel between June 1 and June 20, 2018.

## **Reservation Survey (FROG Panel)**

- A study of the FROG panel was conducted in July 2018 concerning the reservation system, including user satisfaction with the system and potential central Puget Sound expansion. 4,988 completed surveys were collected between July 9 and August 3, 2018.

## **Summer On-Board Recreational Rider Survey (In-person On-Board Survey)**

- A short on-board usage/satisfaction survey was conducted during the peak summer travel period with riders who are not part of the FROG panel testing: satisfaction, ferry fares as part of total trip costs, and future WSF usage. A total of 7,810 surveys were completed (July 12 to Aug 11, 2018).

## **Summer Recreational & Performance Survey (FROG Panel)**

- A survey was conducted of FROG panel members in October 2018 focusing on customer service performance issues and recreational usage of WSF. A total of 4,925 completed surveys were collected (between Sept 30 to Oct 21, 2018).

## **Winter Policy Survey (FROG Panel)**

- A survey was conducted in January 2019 focusing on potential WSF policy changes. A total of 5,141 completed surveys were collected (between Jan 12 to Jan 28, 2019).



# Detailed Findings



# Travel Habits - Winter / Summer Ridership



### Contains Information Regarding:

- ❖ Overall Ridership by Route by Winter / Summer Periods
- ❖ Boarding Method / Trip Purpose / Ticket Type by Winter / Summer Periods
- ❖ Winter Period – Route Ridership / Trip Purpose / Boarding Method / Ticket Type
- ❖ Summer Period – Route Ridership / Trip Purpose / Boarding Method / Ticket Type

### Information Gathered From The Following Surveys:

- ❖ Winter Riders Survey (FROG panel)
- ❖ Summer Riders Survey (FROG panel)

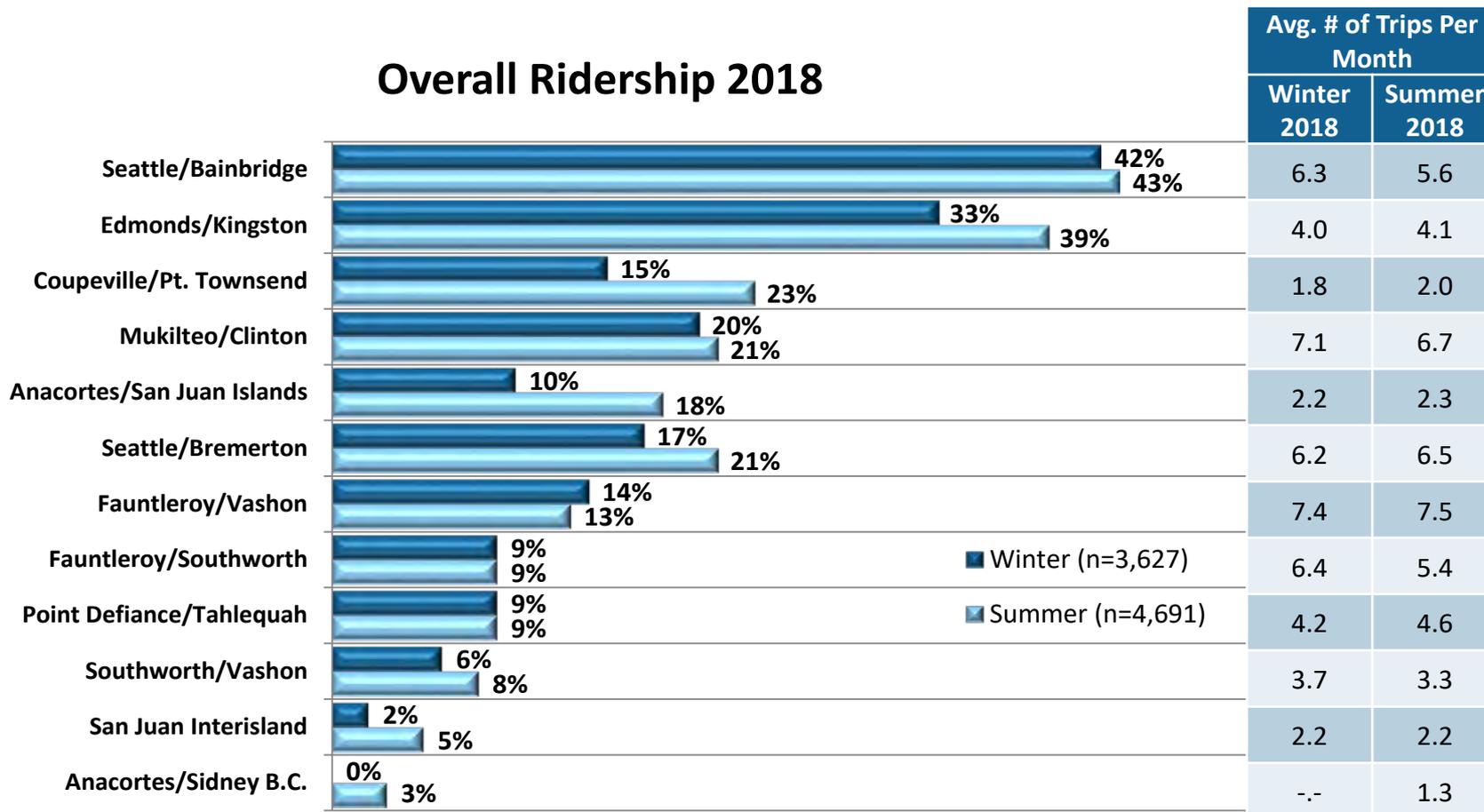
### Key Findings

- ❖ *The Coupeville/Port Townsend and Anacortes/San Juan routes experience the most change in overall ridership (both increased 8 percentage points) between winter and summer.*
- ❖ *Boarding method shows only a small shift away from vehicle drive-on to walk-on between winter and summer. The change in trip purpose is more dramatic with a larger shift to recreational / social trips.*
- ❖ *In the winter, all routes are primarily used for commuting except Coupeville/Pt. Townsend, Anacortes/San Juan, Point Defiance/Tahlequah.*
- ❖ *The percentage of summer riders driving on in a vehicle (either driver or passenger) as well as those reporting they walked on has remained steady since 2016.*
- ❖ *Seattle/Bremerton (63%), Seattle/Bainbridge (57%) and Southworth/Vashon (52%) have the highest proportion of summer walk-on travelers; on all other routes, drive-on has a majority percentage.*



The Coupeville/Port Townsend and Anacortes/San Juan routes experience the most change between winter and summer travel periods (both up 8 percentage points) followed by Edmonds/Kingston (up 6 percentage points).

### Overall Ridership 2018

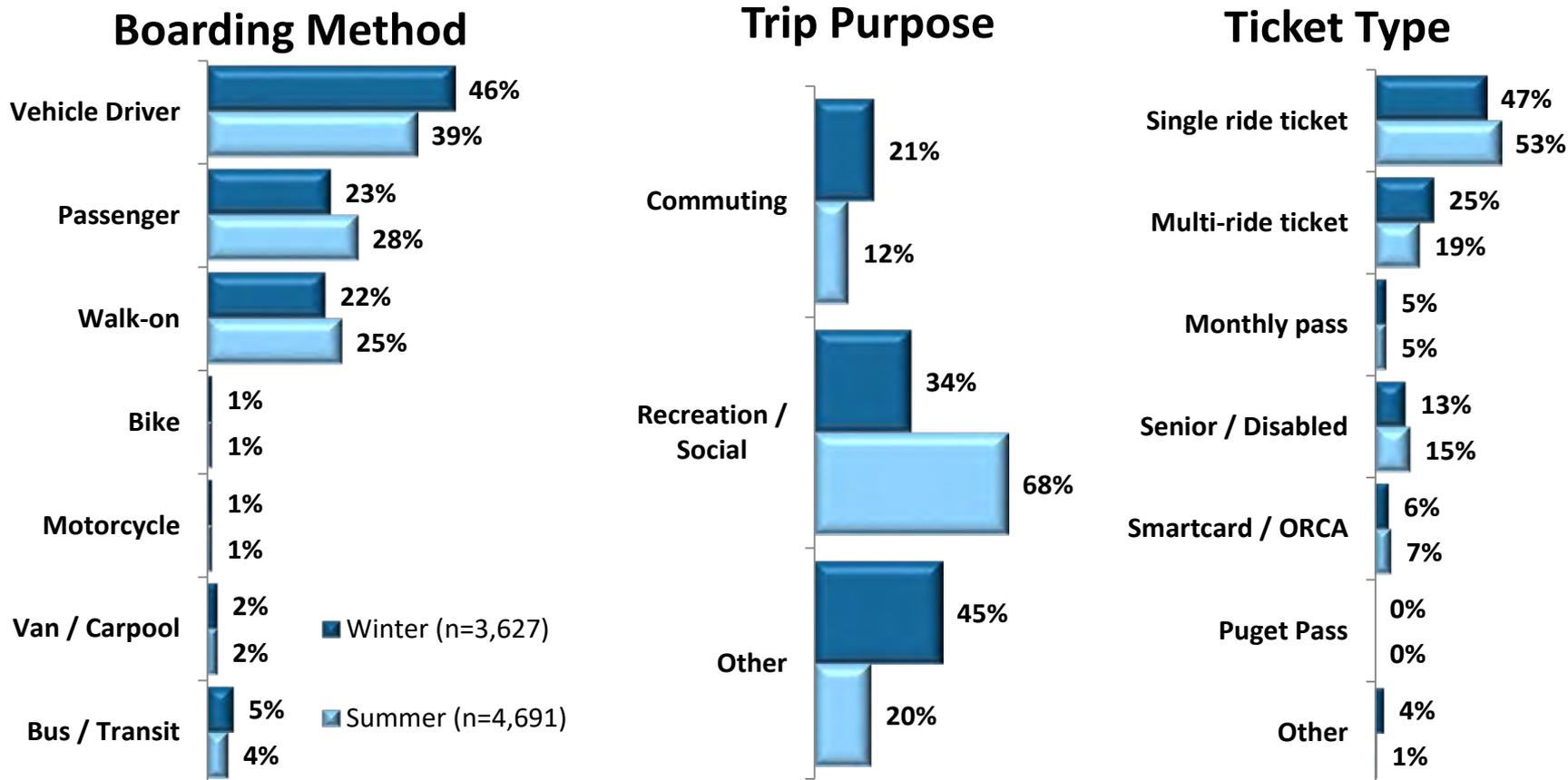


Q2. Which of the following route(s) have you ridden during the Winter period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018)? [CHECK ALL THAT APPLY]

Q3. To get an idea of how people are using the ferry system in the winter months, could you please give us a guesstimate for the route(s) shown below - how many round trips (two one-way trips = one round trip) per month you take during the Winter period?



*Boarding method shows only a small shift away from vehicle drive-on to walk-on between winter and summer. The change in trip purpose is more dramatic with a larger shift to recreational / social trips. There are more single ride tickets used in the summer period.*

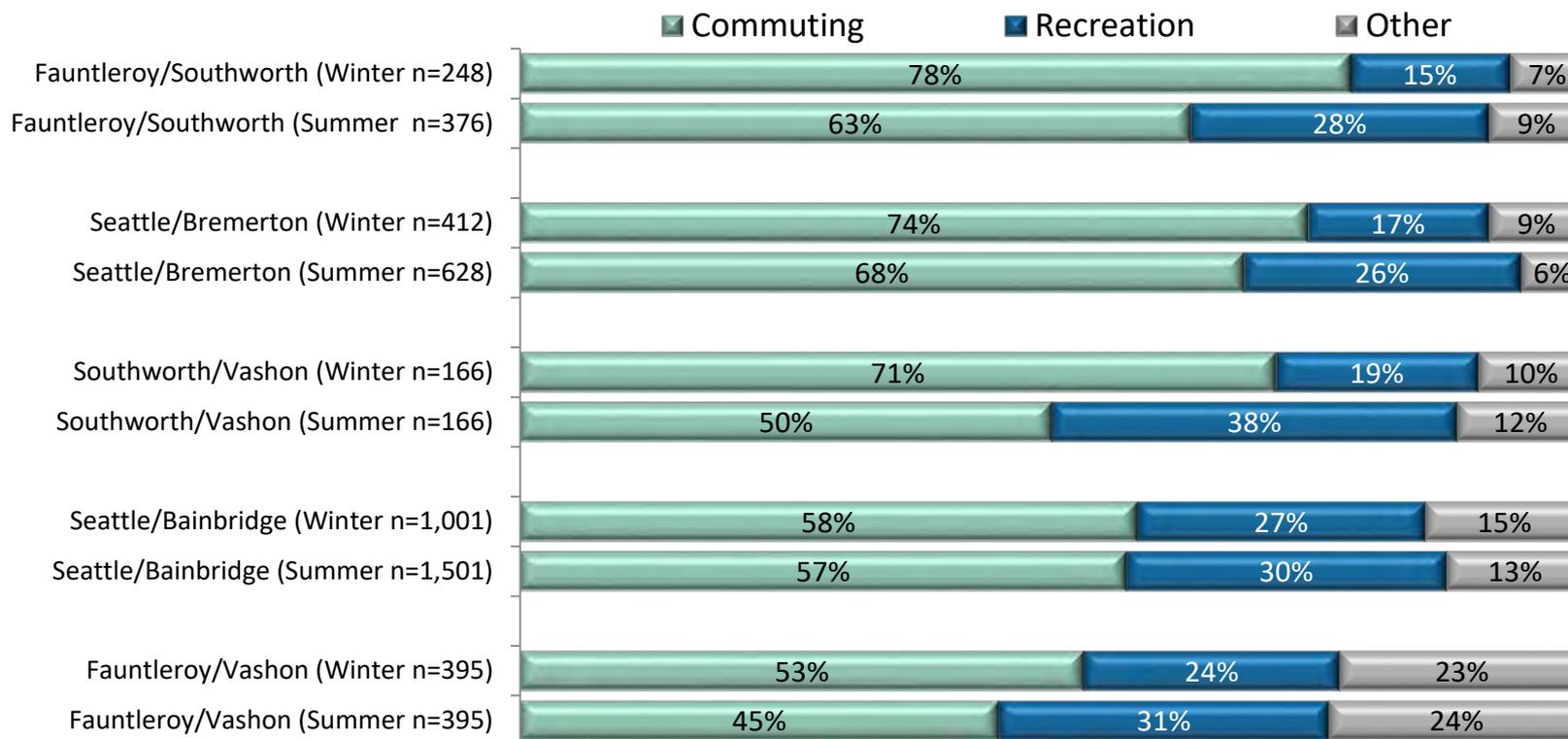


Q15. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, which of the following was the PRIMARY PURPOSE for that specific trip?  
 Q16. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, how did you board the ferry?



*All routes saw a change in the trip purpose between seasons. The least likely to see a change is the Seattle/Bainbridge route.*

### Trip Purpose by Route by Season (1 of 2)

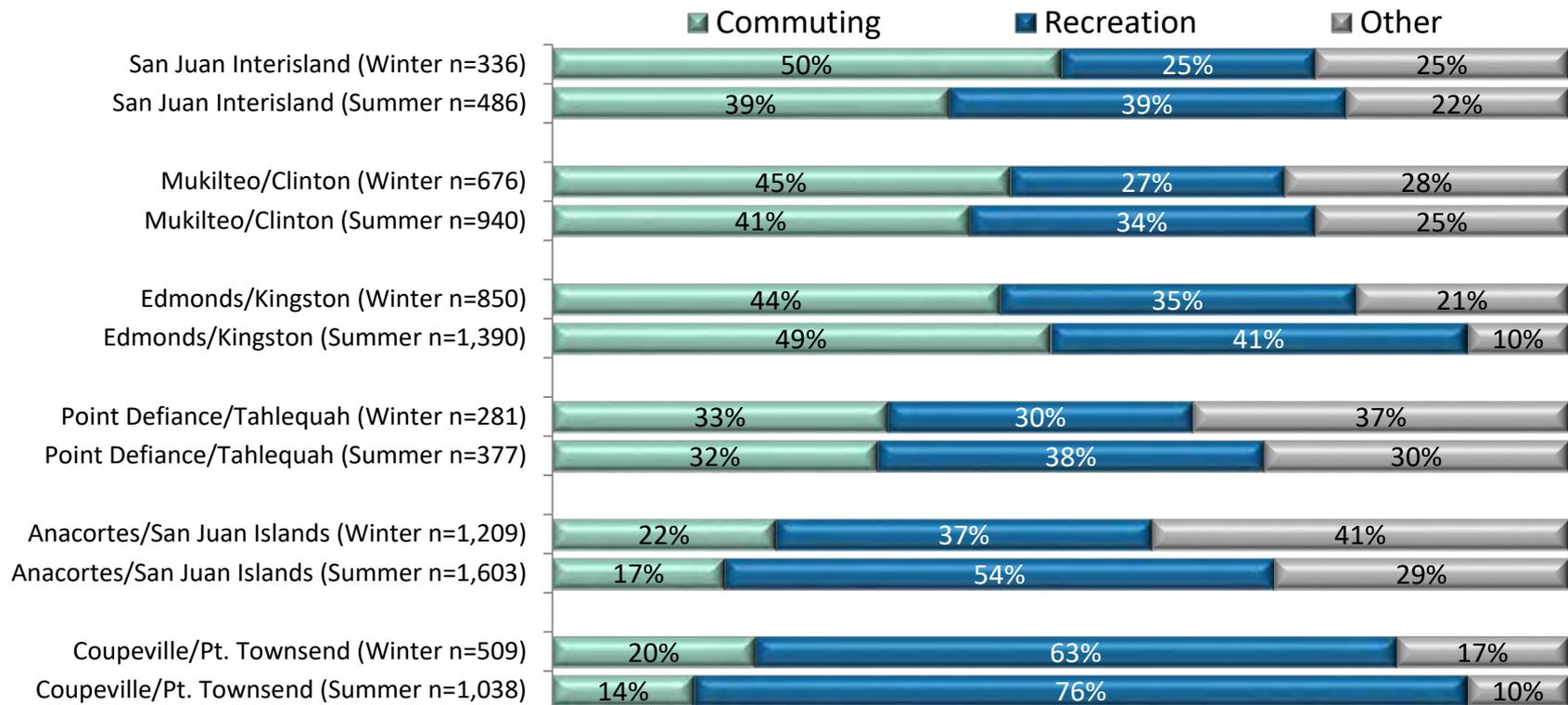


*Q4. Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?*



*All routes saw a change in the trip purpose between seasons. The least likely to see a change is the Seattle/Bainbridge route.*

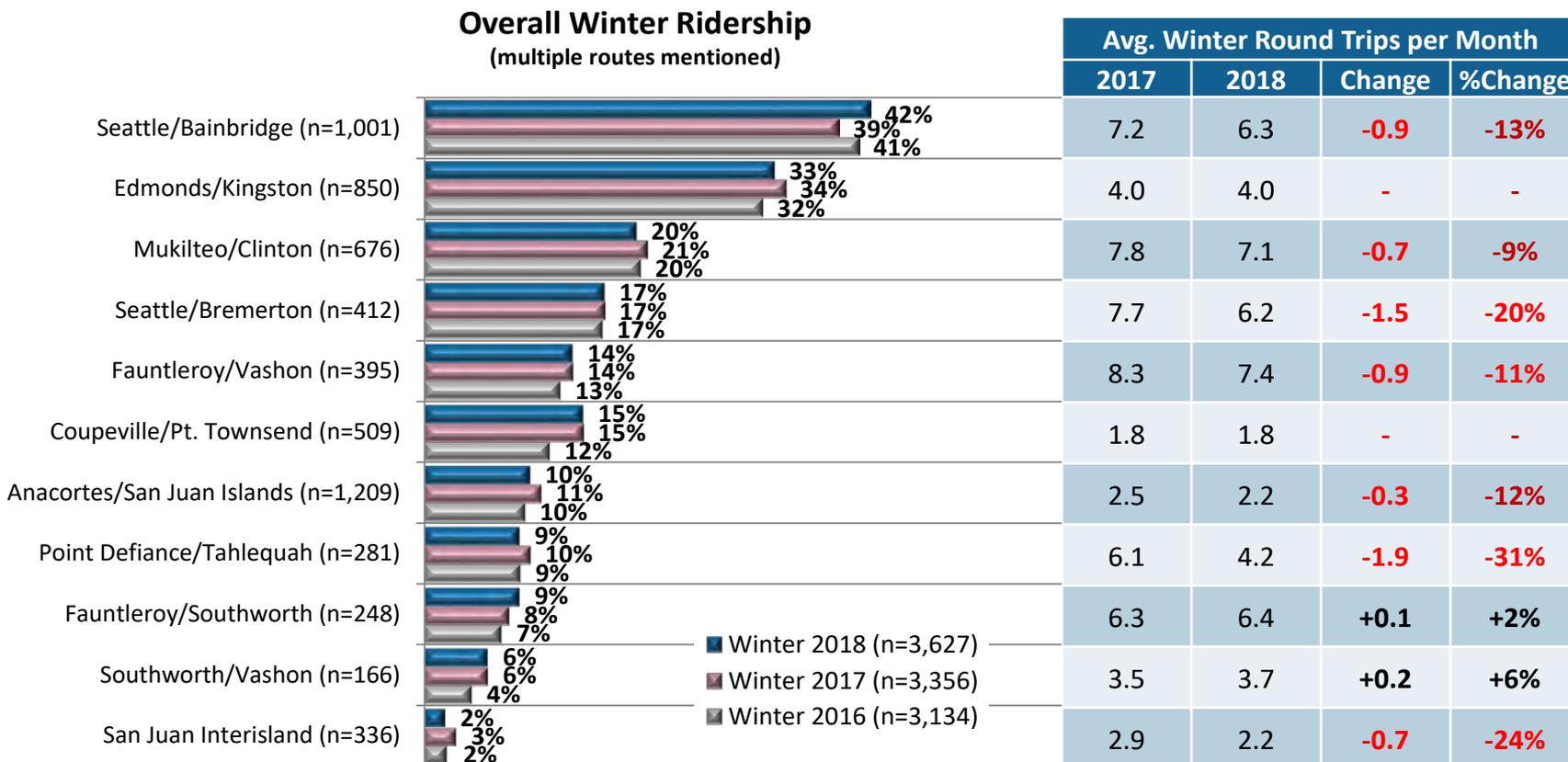
### Trip Purpose by Route by Season (2 of 2)



Q4. *Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?*



Compared to 2017, there is little difference in the routes people rode this winter - Seattle/Bainbridge (42%) and Edmonds/Kingston (33%) continue to top the list. However, average round trips per month this winter showed declines on all routes except Edmonds/Kingston, Coupeville/Pt. Townsend, Fauntleroy/Southworth, and Southworth/Vashon.



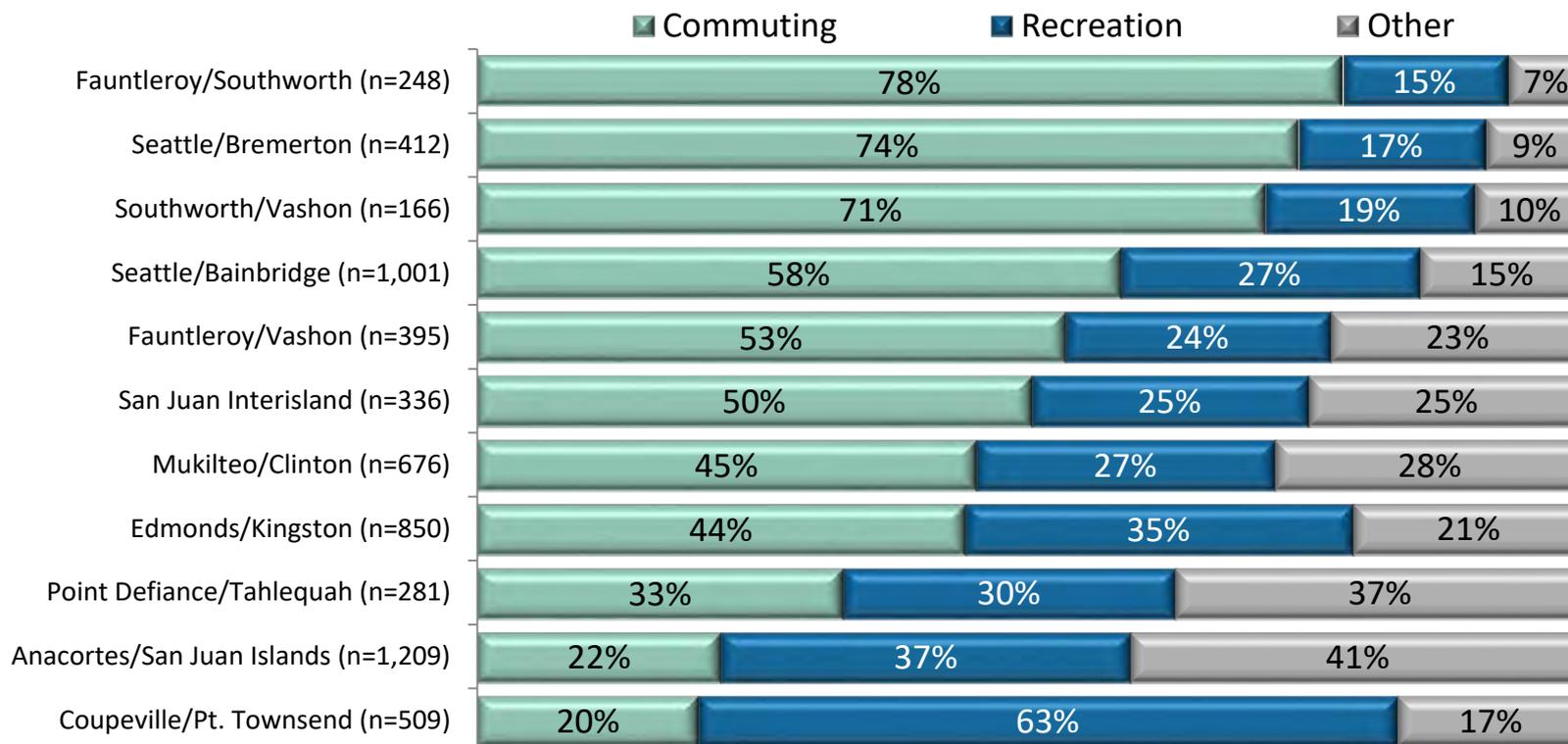
Q2. Which of the following route(s) have you ridden during the Winter period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018)? [CHECK ALL THAT APPLY]

Q3. To get an idea of how people are using the ferry system in the winter months, could you please give us a guesstimate for the route(s) shown below - how many round trips (two one-way trips = one round trip) per month you take during the Winter period?



*All routes except Coupeville/Pt. Townsend, Anacortes/San Juan Islands, Point Defiance/Tahlequah are primarily used for commuting during the winter period. Anacortes/San Juan has a high percentage of “other” trips (shopping, medical appointments, etc.).*

### Winter Trip Purpose by Route



*Q4. Approximately how many of those per month round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were primarily recreational/social purposes (seeing friends/going to events, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?*



*The routes with the highest summer ridership are Seattle/Bainbridge (43%) and Edmonds/Kingston (39%). The average number of trips per month ranges from 1.3 per rider for Anacortes/Sidney (average is 1-2 trips per rider for heavy recreational routes) to 7.5 per rider for Fauntleroy/Vashon (average is 5-6 trips per rider for heavy commuter routes) during the summer period.*

### Summer Route Ridership - 2018

n=4,691

	Route Ridership		Average # of Trips Per Month Per Rider
	2016 n=4,807	Shift	2018
Seattle/Bainbridge	43%	0%	5.6
Edmonds/Kingston	41%	-2%	4.1
Coupeville/Pt. Townsend	25%	-2%	2.0
Mukilteo/Clinton	23%	-2%	6.7
Seattle/Bremerton	19%	+2%	6.5
Anacortes/San Juan Islands	20%	-2%	2.3
Fauntleroy/Vashon	12%	+1%	7.5
Fauntleroy/Southworth	9%	0%	5.4
Point Defiance/Tahlequah	8%	+1%	4.6
Southworth/Vashon	7%	+1%	3.3
San Juan Interisland	6%	-1%	2.2
Anacortes/Sidney B.C.	4%	-1%	1.3

Q21. Which of the following route(s) have you ridden for any purpose during the Summer period? (Multiple Response)

Q22. How many round trips (1 one-way = .5 round trip; 2 one-way = 1 round trip) did you take per month, on average, during the summer period?

# Travel Habits

## Summer Period - Purpose of Last Ferry Ride By Route



*Anacortes/Sidney B.C. (95%), Coupeville/Pt. Townsend (83%), and Anacortes/San Juan Island (73%) have significantly more summer riders saying their last ride was for recreational/social purposes than all other routes. Fauntleroy/Southworth (23%) and Seattle/Bremerton (21%), Southworth/Vashon (18%) and Seattle/Bainbridge have the largest percentage of riders claiming their last ride was for commuting to work.*

Purpose of Last Summer Ferry Ride 2018	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	4,691	1,150	634	158	816	343	188	43	184	775	471	38	52
Tourism / Recreation / Social	<b>60%</b>	54%	57%	52%	63%	54%	56%	49%	<b>83%</b>	61%	<b>73%</b>	52%	<b>95%</b>
Commute to / from work	<b>12%</b>	15%	21%	9%	11%	11%	23%	18%	3%	8%	1%	6%	--
Medical appointment	<b>6%</b>	8%	1%	6%	3%	10%	1%	--	2%	9%	8%	5%	--
Travel to / from to see family / friends	<b>6%</b>	4%	5%	10%	9%	5%	8%	7%	6%	6%	4%	3%	--
Work related activity / business	<b>5%</b>	6%	5%	4%	6%	7%	3%	11%	2%	4%	4%	19%	--
Personal business / activity	<b>4%</b>	6%	--	3%	4%	4%	3%	9%	--	4%	3%	8%	2%
Travel to / from special event	<b>2%</b>	3%	5%	4%	1%	2%	3%	--	--	2%	2%	1%	--
Shopping excursion	<b>1%</b>	--	1%	2%	--	2%	--	--	--	2%	1%	--	2%
Everyday shopping	<b>1%</b>	--	2%	5%	--	1%	1%	--	2%	1%	1%	--	--
Commute to / from school	<b>0%</b>	--	1%	1%	--	--	2%	--	--	--	--	--	--
Other	<b>3%</b>	2%	1%	4%	2%	5%	--	7%	1%	3%	3%	6%	--

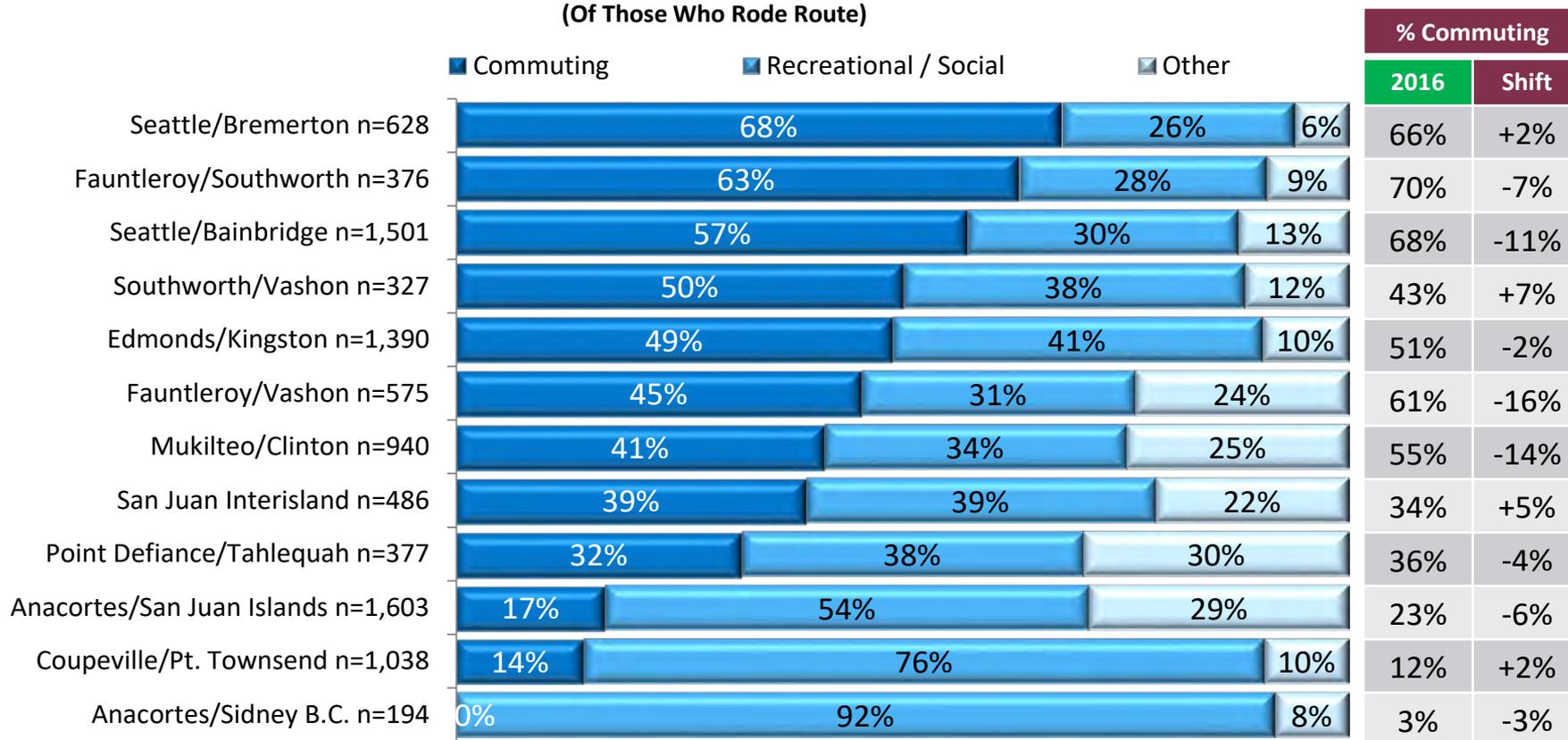
Q33. Thinking about your LAST FERRY RIDE ONLY on the [INSERT] route, which of the following was the primary purpose of that specific trip?  
(merged with Q3B)



*Seattle/Bremerton (68%), Fautleroy/Southworth (63%) and Seattle/Bainbridge (57%) have the highest percentage of summer commuting trips per month, with Anacortes/San Juan Islands (17%), Coupeville/Pt. Townsend (14%) and Anacortes/Sidney B.C. (0%) the lowest.*

### Ratio of Summer Trips by Purpose

(Of Those Who Rode Route)



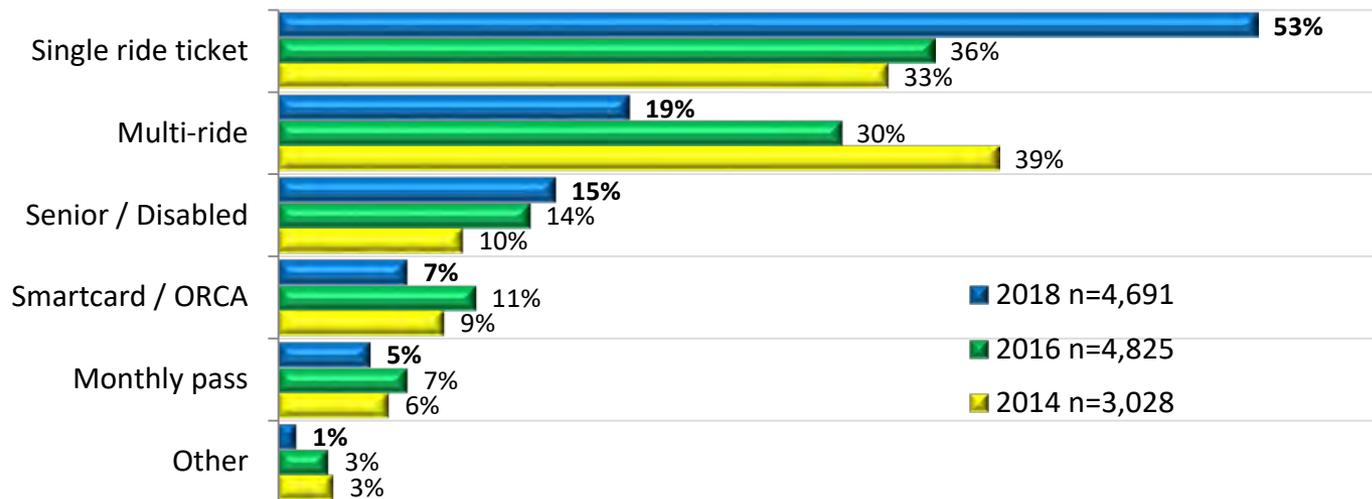
Q23. How many of those per month round trips, for each route, were for the primary purpose of commuting, how many were primarily recreational/social purposes, and how many were for other purposes?



Since 2014 there has been a shift from multi-ride tickets towards single ride ticket usage in the summer. 2018 summer riders are twice as likely to use single ride tickets than multi-ride tickets when traveling.

**Summer Ticket Type**  
Among FROG panel respondents

Difference ('18-'16)



+17%

-11%

+1%

-4%

-2%

-2%

Ticket Used on Last Ferry Ride 2018	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	4,691	1,150	634	158	816	343	188	43	184	775	471	38	52
Single ride ticket	53%	61%	61%	36%	53%	39%	53%	45%	58%	46%	53%	52%	57%
Multi-ride	19%	15%	13%	40%	15%	38%	23%	28%	4%	24%	17%	45%	3%
Senior / Disabled	15%	10%	11%	9%	19%	14%	11%	5%	32%	18%	20%	2%	38%
Smartcard / ORCA	7%	7%	11%	6%	6%	6%	6%	15%	4%	6%	6%	--	--
Monthly pass	5%	7%	5%	4%	6%	2%	5%	7%	1%	4%	1%	--	--
Other	1%	--	--	6%	1%	1%	2%	--	1%	1%	3%	2%	3%

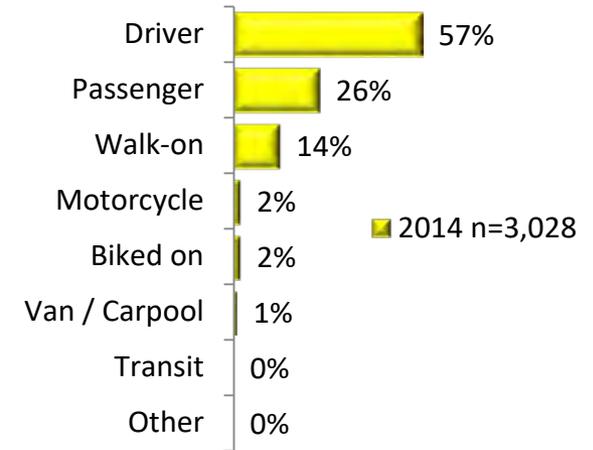
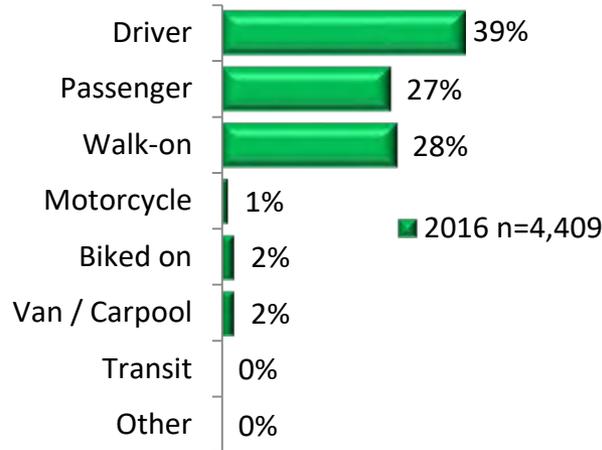
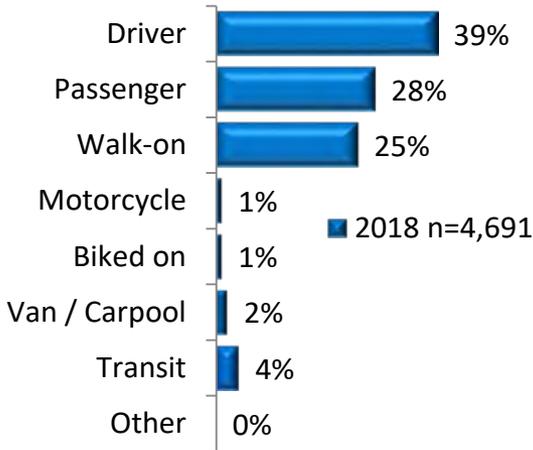
Q37. On what kind of ticket were you travelling? (merged with Q8)

# Travel Habits

## Summer Period - Boarding Method of Last Ferry Ride



The percentage of summer riders driving on in a vehicle (either driver or passenger), as well as those reporting they walked on, has remained steady since 2016. Walk-on is highest on the Seattle/Bremerton route (61%).



Boarding Method of Last Ferry Ride 2018	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
Vehicle driver	39%	27%	20%	54%	46%	53%	53%	55%	40%	50%	37%	91%	30%
Vehicle passenger	28%	22%	12%	35%	30%	32%	23%	4%	42%	35%	41%	8%	30%
Walk-on	25%	36%	61%	10%	17%	7%	14%	39%	14%	7%	17%	1%	28%
Motorcycle	1%	2%	1%	1%	3%	--	5%	--	1%	1%	--	--	3%
Biked on	1%	2%	2%	--	1%	1%	1%	2%	1%	--	1%	--	10%
Van / Carpool	2%	--	--	--	4%	--	4%	--	--	4%	--	--	--
Transit	4%	11%	4%	--	--	7%	--	--	--	3%	4%	--	--
<b>Onboards: Vehicle Driver / Passenger</b>	<b>58%</b>	Boarding method is based on the 612 non-FROG summer recreational riders that were intercepted on the vessels.											
<b>Onboards: Walk-on</b>	<b>39%</b>												
<b>Onboards: Bike on</b>	<b>2%</b>												
<b>Onboards: Motorcycle</b>	<b>1%</b>												

Q34. In which of the following ways have you boarded the ferry? (combined with Q5)

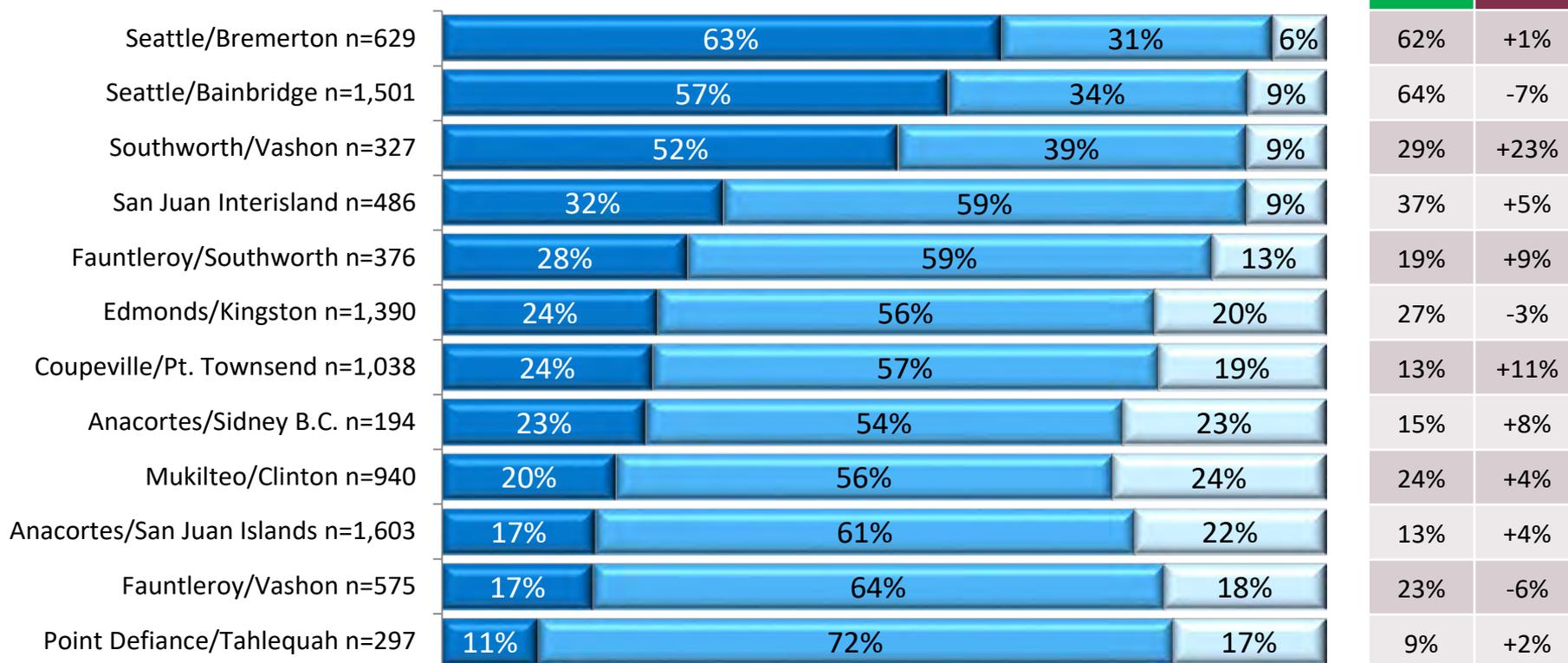


*Seattle/Bremerton (63%), Seattle/Bainbridge (57%), and Southworth/Vashon (52%) have the highest proportion of summer walk-on travelers; on all other routes, drive-on has a majority percentage.*

### Ratio of Summer Trips by Boarding Method

(Of Those Who Rode Route)

■ Walk-on ■ Drive-on ■ Passenger



Q25. During the Summer period ... How many of your ferry trips per month for each route were boarded using the following methods?



# Winter WSF Performance – Measured by FROG Panel



### Contains Information Regarding:

- ❖ Rider Interaction with WSF
- ❖ Satisfaction with WSF Winter Performance
- ❖ Perceived Good Value for WSF
- ❖ Importance and Satisfaction of 26 Key WSF Service Aspects
- ❖ Satisfaction Levels by Route and by Key Aspect
- ❖ Terminal & Vessel Staff Satisfaction
- ❖ Consistency of Hand Signals & Direction
- ❖ Usage and Satisfaction of WSF Reservation Program
- ❖ Satisfaction of WSF Website
- ❖ Satisfaction of WSF Phone Customer Service

### Information Gathered From The Following Surveys:

- ❖ Winter Riders Survey (FROG panel)
  - ❖ An in-depth study of rider satisfaction was fielded at the end of the 2017 & 2018 winter travel periods (both in late March). The 2018 study, based on 4,214 completed surveys, was conducted from March 26 to April 23, 2018, and resulted in a detailed understanding of WSF performance at all levels of contact.

### Key Findings

- ❖ *Overall satisfaction (76%) with the service provided by WSF is strong and has remained constant for the last 5 years. Dissatisfaction increased 1 percentage point in 2018 to 16%.*
- ❖ *Riders on the Southworth/Vashon\* (39%), Fauntleroy/Vashon (30%), and San Juan Inter-Island (27%) routes show both an increase in and higher levels of dissatisfaction than other routes. All other route's level of dissatisfaction has remained approximately the same.*
- ❖ *The highest importance is placed on "ferries bathrooms are clean," "vessel crew is helpful," and "vessel crew is friendly."*
- ❖ *Dissatisfaction on all attributes is largely unchanged. "Adequate parking near terminals" (30%), "terminals are comfortable" (23%), and "terminal bathrooms are clean" (21%) had the highest dissatisfaction levels.*
- ❖ *Dissatisfaction continues to be the highest in Seattle/Bainbridge (35%) followed by Seattle/Bremerton (28%) for terminals are comfortable.*

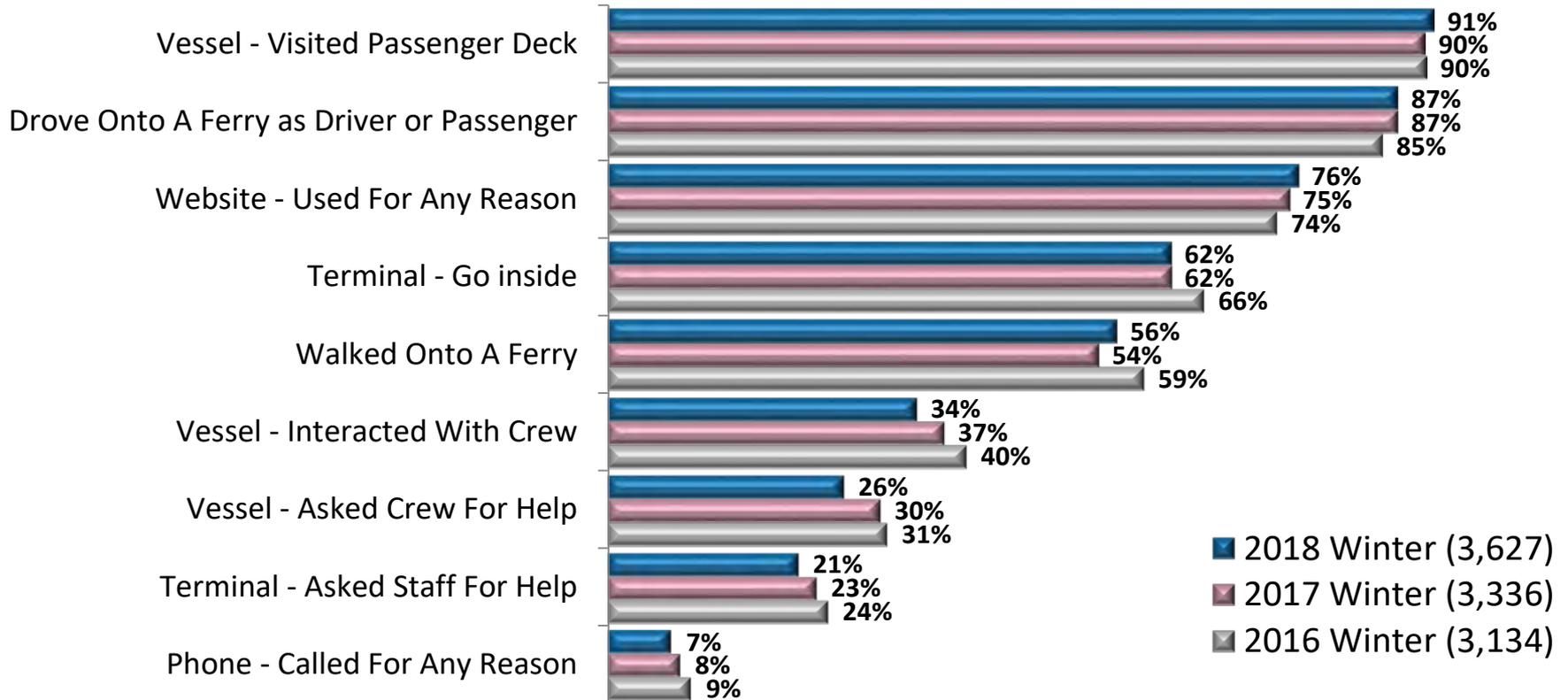
# Winter WSF Performance

## Rider Interaction With WSF



*Riders are most likely to visit the passenger vessel deck (91%) and 87% drive onto the ferry. Three quarters (76%) say they have used the WSF website. These percentages are unchanged from winter 2017.*

**WSF Touch Points With Winter Riders**



*Q(s) During the winter period, did you ... Q20 Go inside a ferry terminal for any reason? Q100 Did you specifically ask a WSF terminal staff member for help/assistance? Q30 Did you walk onto a ferry? Q43 Did you either drive onto a ferry or board as a passenger in a vehicle? Q70 Did you use/visit the vessel passenger deck area? Q80 Did you have any interaction with any of the vessel crew? Q103 Did you specifically ask a WSF vessel staff member for help/assistance? Q90 Use the WSF website? Q93 Call WSF customer service by phone?*

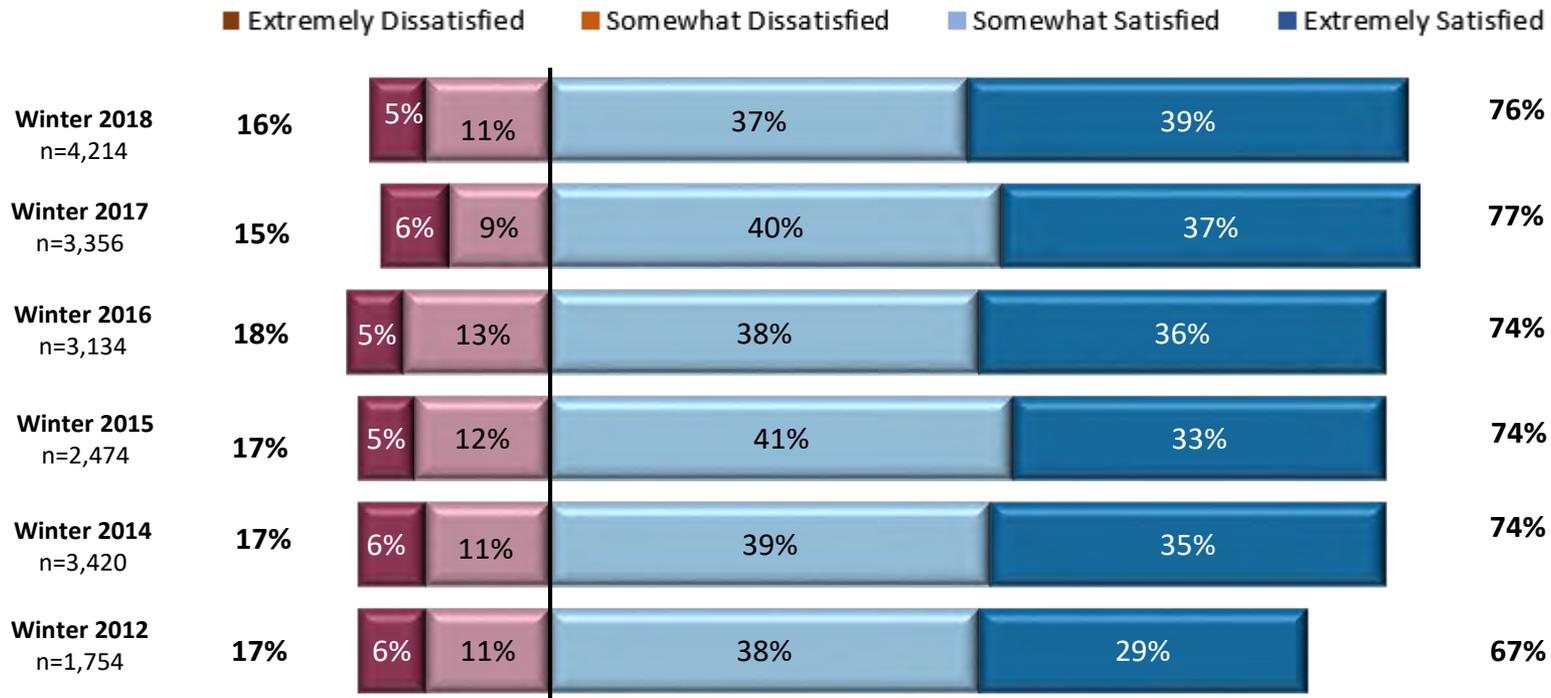
# Winter WSF Performance

## Overall Satisfaction



Overall satisfaction (76%) with the service provided by WSF is strong (37% Satisfied / 39% Extremely Satisfied) and has remained constant for the last 5 years. Dissatisfaction increased 1 percentage point in 2018 to 16%, but the extremely dissatisfied (5%) declined 1 percentage point over 2017.

### Overall Satisfaction with WSF



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 represent the corresponding total dissatisfaction/satisfaction

Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 7<sup>th</sup> through March 31<sup>st</sup> 2018. All things considered, how satisfied are you with the service provided by Washington State Ferries?

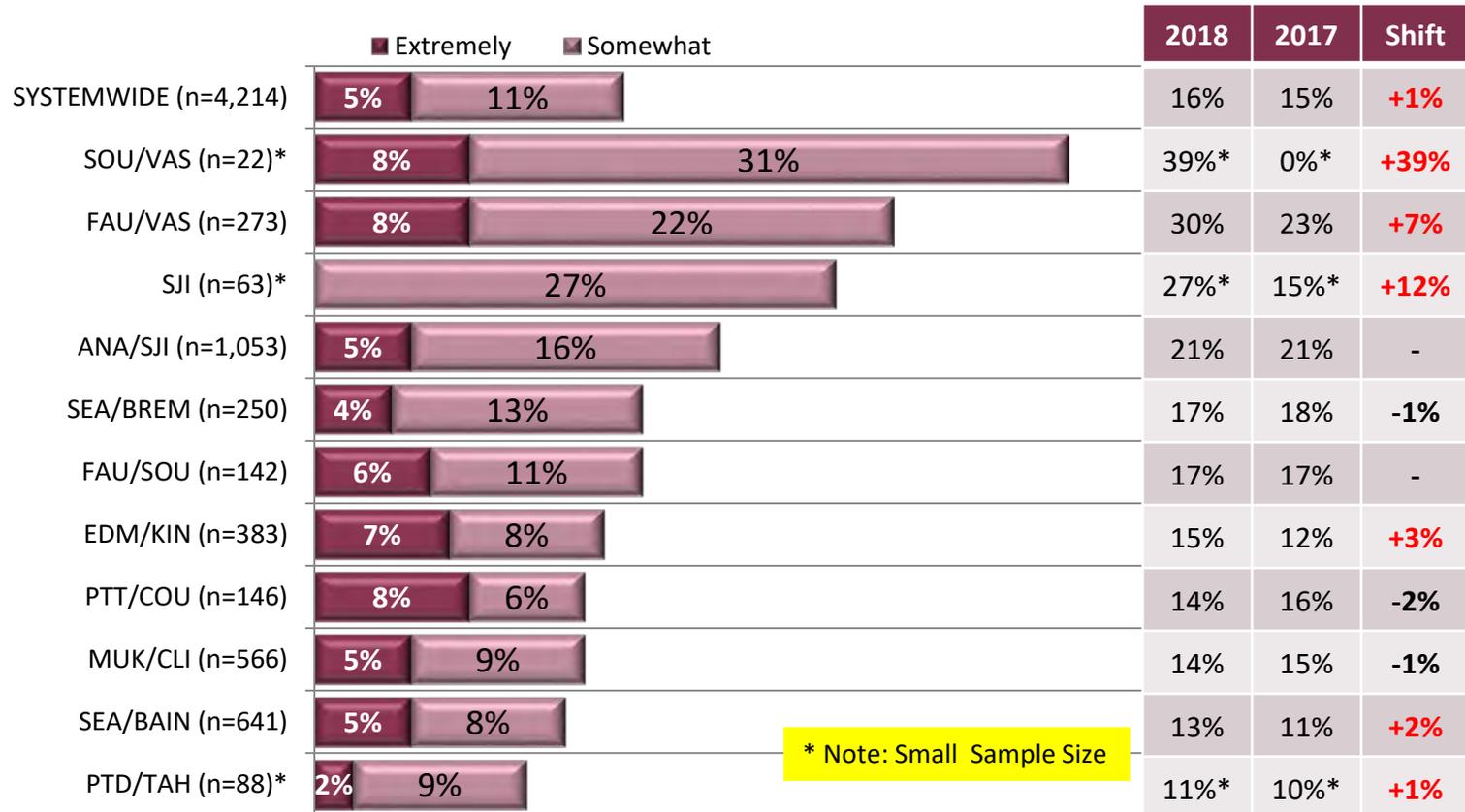
# Winter WSF Performance

## Overall Dissatisfaction by Route



Riders on the Southworth/Vashon\* (39%), Fauntleroy/Vashon (30%),m and San Juan Inter-Island\* (27%) routes show both an increase in and higher levels of dissatisfaction than other routes. All other routes' level of dissatisfaction has remained approximately the same as was found in winter 2017.

**Overall Dissatisfaction by Route (Total Dissatisfied)**



Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 7<sup>th</sup> through March 31st 2018. All things considered, how satisfied are you with the service provided by Washington State Ferries?

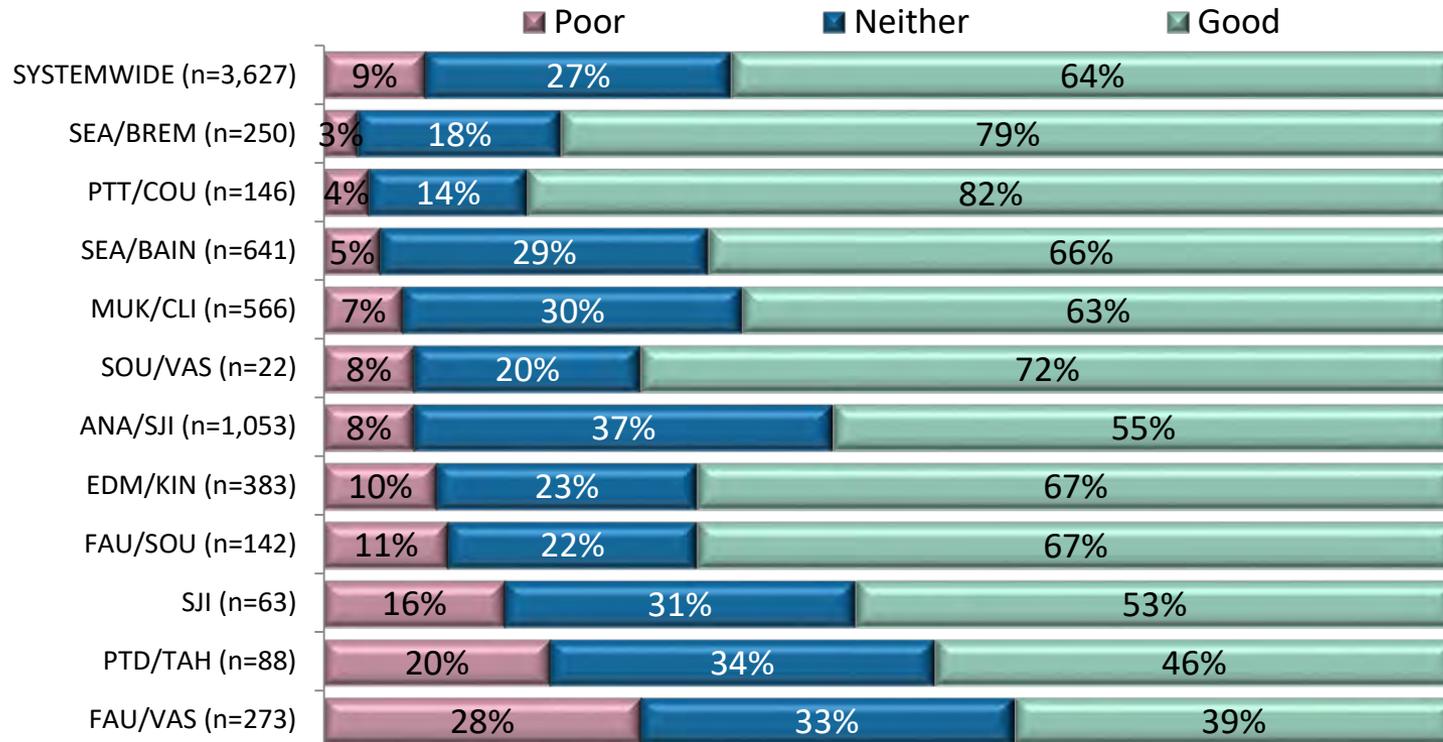
# Winter WSF Performance

## Perceived Good Value by Route



Systemwide the vast majority (64%) of riders say WSF is a good value to them. In comparison, 9% say it is a poor value. Seattle/Bremerton (3%), Port Townsend/Coupeville (4%), and Seattle/Bainbridge (5%) had the lowest poor value rating while San Juan Inter-Island (16%), Point Defiance/Tahlequah (20%), and Fautleroy/Vashon (28%) had the highest rating.

### Perceptions of Value by Route



Q116. Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries?

# Winter WSF Performance Importance by Attribute



*Importance of all attributes is largely unchanged compared to 2017. The highest importance is placed on “ferries bathrooms are clean” (98%), “vessel crew is helpful” (98%), and “vessel crew is friendly” (97%).*

Code	Attributes	Importance (4-5)			
		2018	2017	Change	2016
21	Ferries bathrooms are clean	98%	97%	+1%	96%
24	Vessel crew is helpful	98%	97%	+1%	97%
23	Vessel crew is friendly	97%	96%	+1%	96%
4	Terminal bathrooms are clean	96%	94%	+2%	94%
12	Efficiently processes vehicles	96%	97%	-1%	96%
22	Vessels are well maintained	96%	95%	+1%	96%
20	Passenger seating areas are clean	96%	95%	+1%	96%
16	Loading crews provide clear directions	95%	96%	-1%	95%
14	Vehicle loading procedures efficient	95%	96%	-1%	95%
11	Buying tickets easy and quick	95%	96%	-1%	95%
18	Vehicle unloading procedures efficient	94%	95%	-1%	94%
19	Unloading crews provide clear direction	94%	94%	-	94%
1	Terminals are clean	93%	92%	+1%	92%
7	Easy loading/ unloading for walk-on	91%	93%	+2%	92%
15	Loads ferries to capacity	90%	89%	+1%	88%
8	Passenger loading efficient	90%	93%	-3%	91%
9	Passenger unloading efficient	90%	92%	-2%	90%
25*	Terminal to vessel walkway is safe	90%			
10	Toll booth staff is friendly	90%	92%	-2%	91%
13	Vehicle loading crew is friendly	86%	87%	-1%	88%
3	Terminal staff is helpful	86%	85%	+1%	87%
17	Unloading crew is friendly	86%	87%	-1%	87%
26*	Dock-side holding area fully utilized	85%			
2	Terminals are comfortable	84%	81%	+3%	82%
6	Adequate parking near terminals	77%	79%	-2%	78%
5	WSF and transit schedules coordinated	69%	67%	+2%	70%

- ❖ This table gives an overview of the individual attribute quad charts (see page 51) that follow for importance.
- ❖ Importance [1 = Not Important, 5 = Very Important] was asked on a 1 to 5 scale of those that used that attribute.
- ❖ For each attribute, the table shows:
  - The percent of people who rated the attribute as 4 or 5 on the Importance scale
  - Total importance (4-5) for **Winter 2018, Winter 2017** and **Winter 2016** are shown
  - The **Change** in importance from 2017 to 2018. **Red** indicates **lesser importance** in 2018 than in 2017.
  - \* New attributes added in 2018

# Winter WSF Performance

## Dissatisfaction by Attribute



*Dissatisfaction on all attributes is largely unchanged. “Adequate parking near terminals” (30%), “terminals are comfortable” (23%), and “terminal bathrooms are clean” (21%) had the highest dissatisfaction levels.*

Code	Attributes	Importance (4-5)	Dissatisfaction (1-2)			2016
			2018	2017	Change	
6	Adequate parking near terminals	77%	<b>30%</b>	30%	-	31%
2	Terminals are comfortable	84%	<b>23%</b>	17%	<b>+6%</b>	17%
4	Terminal bathrooms are clean	96%	<b>21%</b>	20%	<b>+1%</b>	20%
5	WSF and transit schedules coordinated	69%	<b>14%</b>	13%	<b>+1%</b>	15%
16	Loading crews provide clear directions	95%	<b>13%</b>	13%	-	14%
12	Efficiently processes vehicles	96%	<b>12%</b>	12%	-	11%
14	Vehicle loading procedures efficient	95%	<b>10%</b>	10%	-	9%
15	Loads ferries to capacity	90%	<b>10%</b>	10%	-	9%
8	Passenger loading efficient	90%	<b>9%</b>	10%	<b>-1%</b>	11%
7	Easy loading/ unloading for walk-on	91%	<b>9%</b>	9%	-	11%
9	Passenger unloading efficient	90%	<b>9%</b>	8%	<b>+1%</b>	9%
1	Terminals are clean	93%	<b>9%</b>	8%	<b>+1%</b>	7%
25*	Terminal to vessel walkway is safe	90%	<b>9%</b>			
26*	Dock-side holding area fully utilized	85%	<b>8%</b>			
21	Ferries bathrooms are clean	98%	<b>8%</b>	7%	<b>+1%</b>	8%
13	Vehicle loading crew is friendly	86%	<b>7%</b>	7%	-	6%
3	Terminal staff is helpful	86%	<b>7%</b>	8%	<b>-1%</b>	8%
11	Buying tickets easy and quick	95%	<b>6%</b>	6%	-	6%
18	Vehicle unloading procedures efficient	94%	<b>5%</b>	6%	<b>-1%</b>	7%
22	Vessels are well maintained	96%	<b>5%</b>	5%	-	8%
20	Passenger seating areas are clean	96%	<b>5%</b>	4%	<b>+1%</b>	5%
19	Unloading crews provide clear direction	94%	<b>4%</b>	5%	<b>-1%</b>	5%
23	Vessel crew is friendly	97%	<b>4%</b>	3%	<b>+1%</b>	4%
24	Vessel crew is helpful	98%	<b>4%</b>	4%	-	3%
10	Toll booth staff is friendly	90%	<b>3%</b>	4%	<b>-1%</b>	3%
17	Unloading crew is friendly	86%	<b>2%</b>	4%	<b>-2%</b>	3%

- ❖ This table gives an overview of the individual attribute quad charts that follow on page 51.
- ❖ Importance [1 = Not Important, 5 = Very Important] and Satisfaction [1 = Very Dissatisfied, 5 = Very Satisfied] were asked on a 1 to 5 scale of those that used that attribute.
- ❖ For each attribute, the table shows:
  - The percent of people who rated the attribute as 4 or 5 on the Importance scale.
  - Total dissatisfaction (1-2) for **Winter 2018, Winter 2017** and **Winter 2016**.
  - The **Change** in dissatisfaction from 2017 to 2018. **Red** indicates **greater dissatisfaction** in 2018 than in 2017.
  - \* New attributes added in 2018.

# Winter WSF Performance

## Summary of Attribute Dissatisfaction by Route



Color Code: Dissatisfaction Light (10-19%), Medium (20-29%), Heavy (>30%)	Dissatisfaction by Route													
	Import (4-5)	Dissat. (1-2)	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI	
Number of Respondents Varies by Question (Max n Shown)	4,214	4,214	641	250	88	383	273	142	22	146	566	1,053	63	
Adequate parking near the terminals (attribute code # 6)	77%	30%	19%	30%	41%	20%	55%	23%	29%	30%	57%	10%	0%	
Terminals are comfortable (2)	84%	23%	35%	28%	22%	17%	15%	8%	20%	6%	8%	15%	10%	
Bathrooms in the terminals are clean and well maintained (4)	96%	21%	35%	32%	13%	11%	7%	3%	3%	1%	7%	13%	18%	
Sailing schedule is adequately coordinated w/transit services (5)	69%	14%	7%	25%	27%	15%	15%	13%	26%	5%	12%	36%	15%	
Vehicle loading crews provide clear directions/hand signals (16)	95%	13%	12%	5%	24%	9%	21%	13%	17%	5%	15%	15%	23%	
Efficiently processes vehicles through ticket lanes (12)	96%	12%	10%	6%	31%	7%	45%	19%	15%	1%	4%	10%	21%	
Vehicle loading procedures are efficient (14)	95%	10%	6%	7%	26%	6%	29%	15%	24%	4%	7%	10%	13%	
Loads ferries to capacity with little room between vehicles (15)	90%	10%	7%	4%	22%	6%	27%	15%	50%	5%	7%	8%	16%	
Walk-on passenger loading procedures are efficient (8)	90%	9%	11%	13%	6%	3%	6%	12%	0%	3%	9%	4%	0%	
Provides easy loading/unloading for walk-on passengers (7)	91%	9%	11%	10%	3%	3%	6%	16%	9%	5%	12%	4%	9%	
Walk-on passenger unloading procedures are efficient (9)	90%	9%	13%	7%	3%	1%	5%	15%	0%	1%	12%	6%	2%	
Terminals are clean and well maintained (1)	93%	9%	18%	15%	2%	3%	2%	3%	0%	0%	1%	4%	0%	
Terminal to vessel walkway is safe (25)	90%	9%	9%	10%	3%	5%	2%	15%	0%	6%	18%	5%	11%	
Dock-side holding area fully utilized (26)	85%	8%	5%	2%	21%	3%	27%	18%	32%	1%	3%	4%	4%	
Bathrooms on the ferries are clean and well maintained (21)	98%	8%	9%	12%	4%	10%	4%	5%	7%	3%	5%	8%	5%	
Vehicle loading crew is friendly, courteous and polite (13)	86%	7%	6%	4%	15%	5%	8%	4%	11%	4%	10%	11%	13%	
Terminal staff is helpful, competent and knowledgeable (3)	86%	7%	8%	10%	20%	4%	5%	5%	12%	1%	6%	5%	8%	
WSF makes buying tickets easy and quick (11)	95%	6%	4%	4%	22%	3%	21%	7%	13%	1%	2%	6%	5%	
Vehicle unloading procedures are efficient (18)	94%	5%	4%	4%	24%	7%	5%	5%	2%	2%	3%	5%	5%	
Vessels are well maintained and safe (22)	96%	5%	5%	5%	0%	5%	8%	5%	15%	4%	3%	15%	10%	
Ferry passenger seating areas are clean/comfortable (20)	96%	5%	3%	23%	2%	6%	2%	5%	9%	1%	1%	7%	5%	
Vehicle unloading crew provide clear direction/hand signals (19)	94%	4%	2%	2%	14%	4%	4%	7%	2%	2%	3%	4%	4%	
Vessel crew is friendly, courteous and polite (23)	97%	4%	2%	2%	1%	7%	5%	0%	3%	5%	6%	6%	0%	
Vessel crew is helpful, competent, knowledgeable (24)	98%	4%	3%	5%	7%	5%	7%	0%	3%	1%	5%	5%	0%	
Toll booth staff is friendly, courteous and polite (10)	90%	3%	3%	1%	2%	3%	7%	3%	2%	1%	1%	5%	5%	
Vehicle unloading crew is friendly, courteous and polite (17)	86%	2%	1%	1%	12%	2%	1%	2%	2%	1%	2%	3%	0%	

# Winter WSF Performance

## Dissatisfied Riders – Dissatisfaction by Attribute

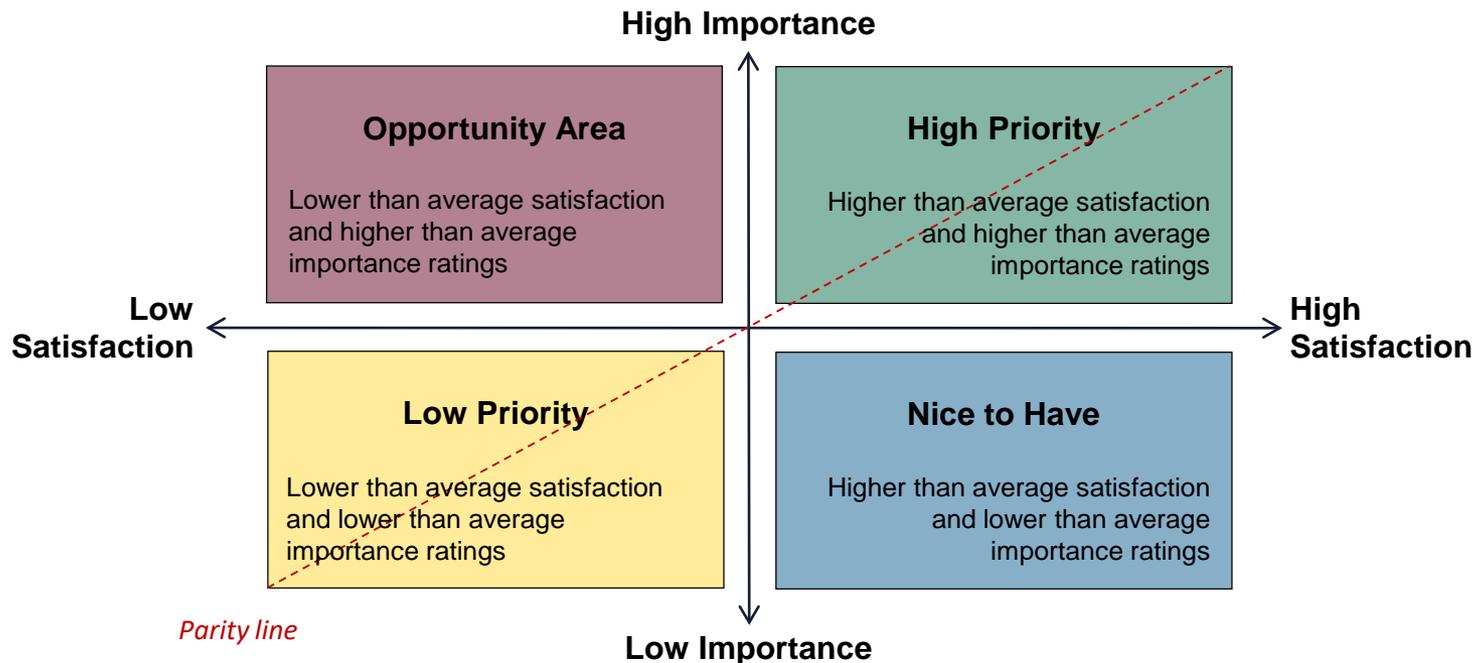


*As expected, riders who are dissatisfied with WSF overall have higher dissatisfaction levels on every individual attribute tested. By far, dissatisfied riders are most unhappy with parking availability (42%).*

	<span style="color: #0056b3;">■</span> Very Dissatisfied <span style="color: #4f81bd;">■</span> Somewhat Dissatisfied		Dissatisfaction		
			Dissat Riders	All Riders	Difference
Adequate parking near terminals ( 6)	26%	16%	42%	30%	+12
Terminals are comfortable ( 2)	12%	20%	32%	23%	+9
Terminal bathrooms clean ( 4)	17%	13%	30%	21%	+9
Efficiently processes vehicles (12)	21%	9%	30%	12%	+18
WSF and transit schedules coordinated ( 5)	13%	13%	26%	14%	+12
Loads ferries to capacity (15)	14%	12%	26%	10%	+16
Loading crews provide clear directions (16)	10%	15%	25%	13%	+12
Vehicle loading procedures efficient (14)	14%	10%	24%	10%	+14
Easy loading / unloading for walk-on ( 7)	12%	7%	19%	9%	+10
Buying tickets easy and quick (11)	11%	8%	19%	6%	+13
Dock-side holding area fully utilized (26)	13%	6%	19%		
Passenger loading efficient ( 8)	11%	6%	17%	9%	+8
Vehicle loading crew is friendly (13)	6%	11%	17%	7%	+10
Terminal staff is helpful ( 3)	6%	10%	16%	7%	+9
Ferry bathrooms are clean (21)	7%	8%	15%	8%	+7
Vessel crew is helpful (24)	5%	10%	15%	4%	+11
Passenger unloading efficient ( 9)	9%	6%	15%	9%	+6
Terminals are clean ( 1)	8%	6%	14%	9%	+5
Terminal to vessel walkway is safe (25)	9%	5%	14%		
Vessels are well maintained (22)	4%	7%	11%	5%	+6
Vessel crew is friendly (23)	6%	5%	11%	4%	+7
Vehicle unloading procedures efficient (18)	5%	5%	10%	5%	+5
Passenger seating areas are clean (20)	4%	6%	10%	5%	+5
Toll booth staff is friendly (10)	3%	5%	8%	3%	+5
Unloading crews provide clear directions (19)	3%	4%	7%	4%	+3
Vehicle unloading crew is friendly (17)	2%	2%	4%	2%	+2



- ❖ The following slides present quadrant charts comparing the relative satisfaction for each ferry attribute to the relative importance of that attribute.
- ❖ 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 are equal, and identifies the ferry attributes with the greatest disparity between satisfaction and importance.
- ❖ Attributes considered important, but with low satisfaction (performance), are opportunity areas for WSF. Increasing awareness of these important attributes may help promote more positive impressions of the ferry system, and boost overall satisfaction.



# Winter WSF Performance

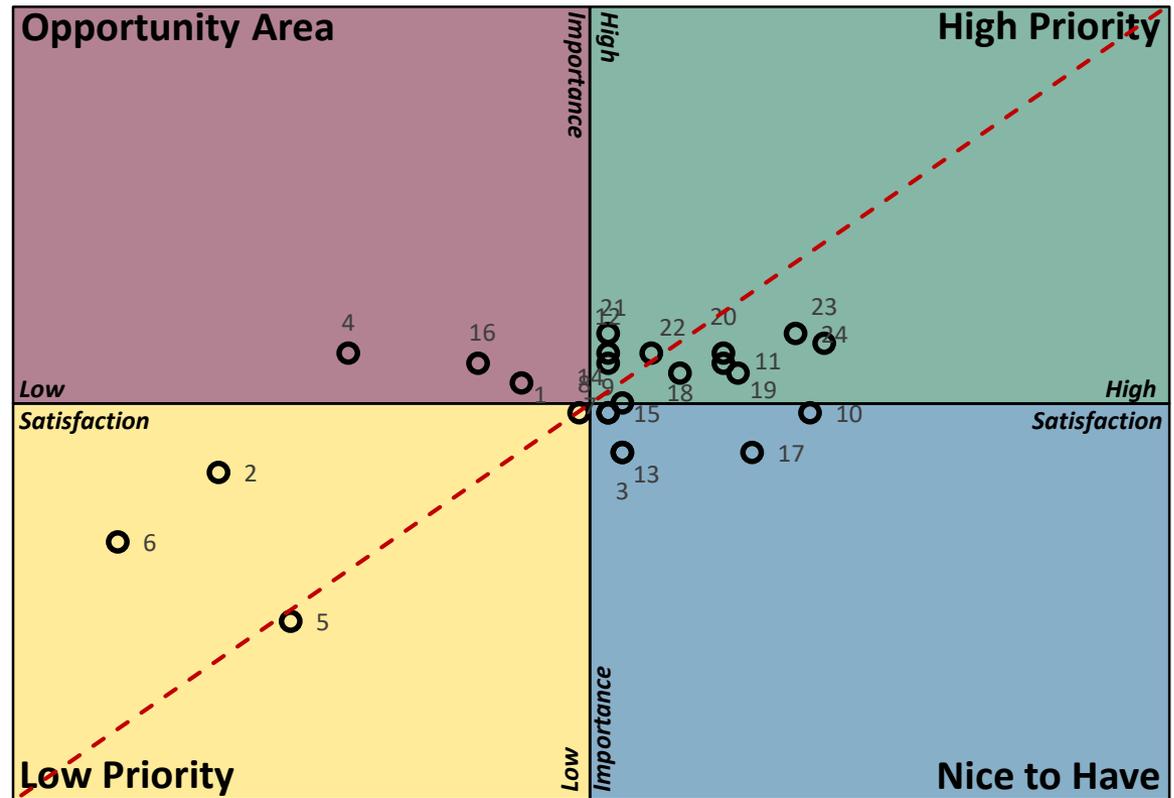
## Gap Analysis: Overall - 2018



**2018 Opportunity Areas:** Similar to past years, terminal bathroom cleanliness (4) and clear loading crew directions (16) are the key opportunity areas. While of lower priority to riders, the amount of parking near terminals (6) and terminals are comfortable (2) are underperforming by a wide margin.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=1,278-3,490)**



# Winter WSF Performance

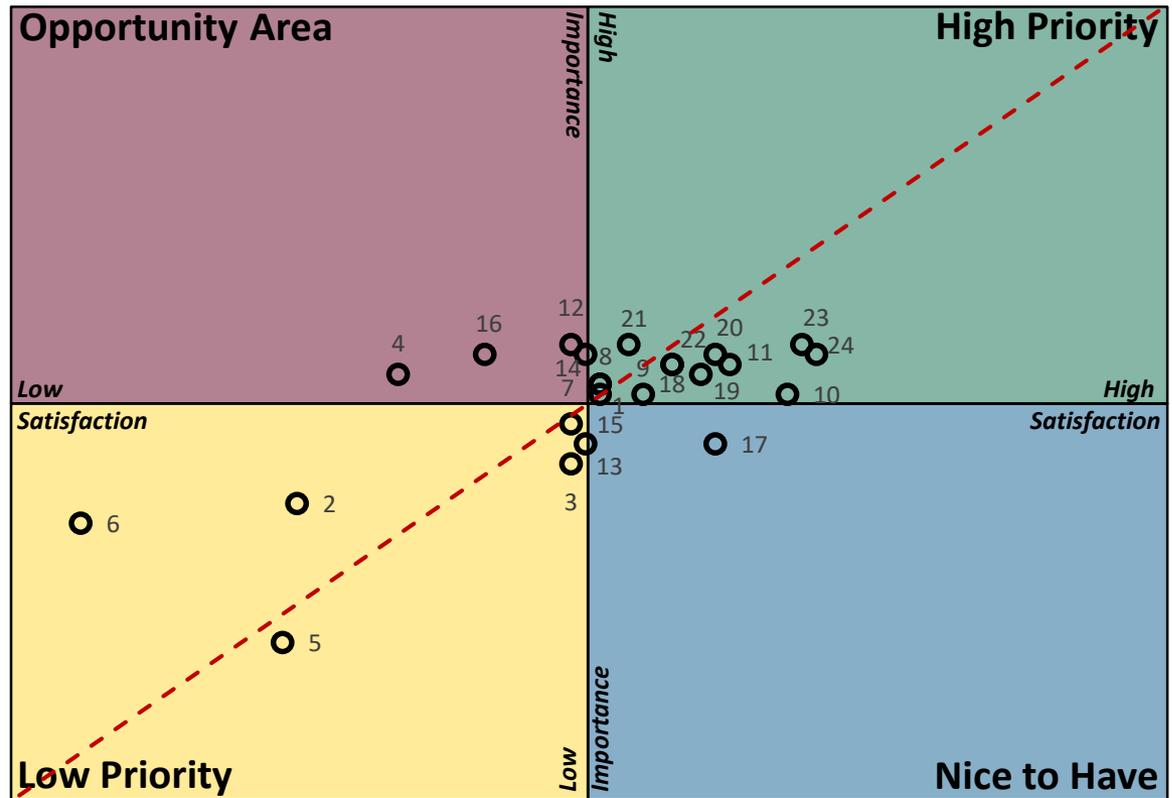
## Gap Analysis: Overall - 2017



**2017 Opportunity Areas:** Terminal bathroom cleanliness (4) and clear loading crew directions (16) are the key opportunity areas. While of lower priority to riders, the amount of parking near terminals (6) and terminals are comfortable (2) are underperforming by a wide margin.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=1,246-3,043)**

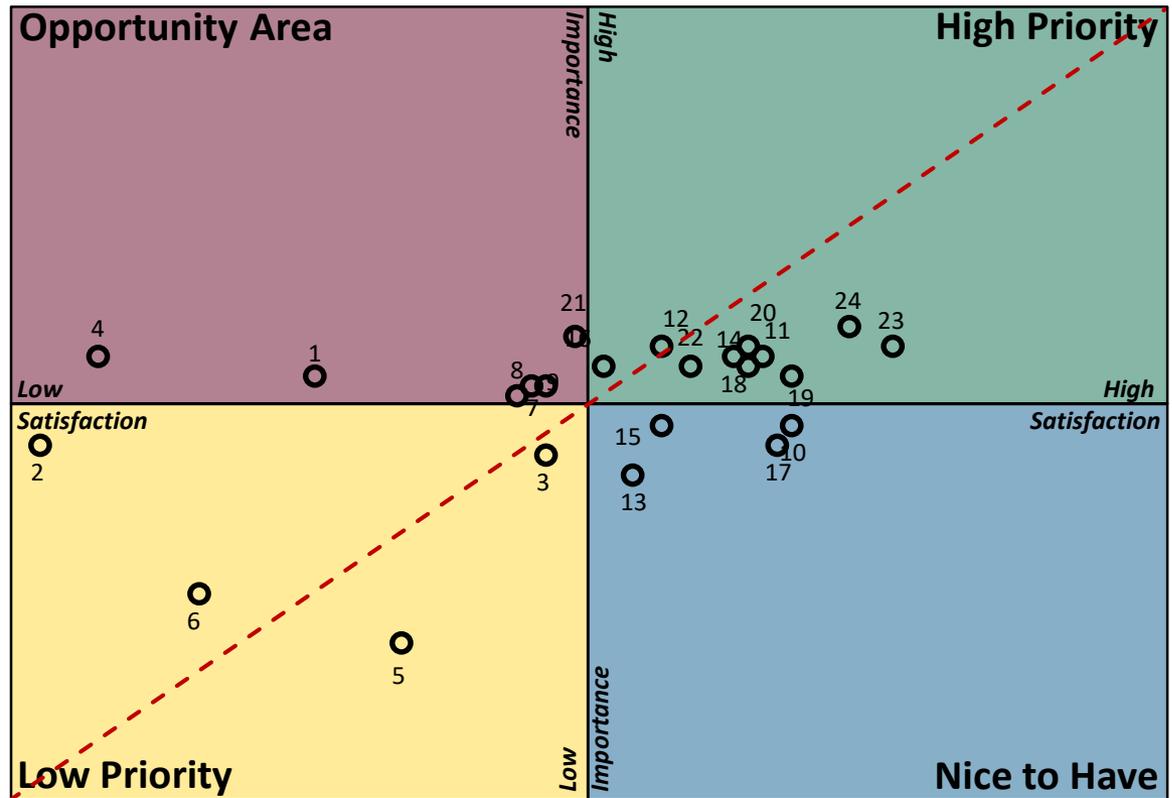




**Seattle/Bainbridge Opportunity Areas:** Terminal bathroom cleanliness (4) and terminal cleanliness (1) are the biggest opportunity areas. Terminal comfort (2) and adequate parking near terminals (6) are lower priority, but still underperforming by a wide margin. Aspects 4, 1, and 2 received worse ratings than in years past.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=337-1,006)**



# Winter WSF Performance

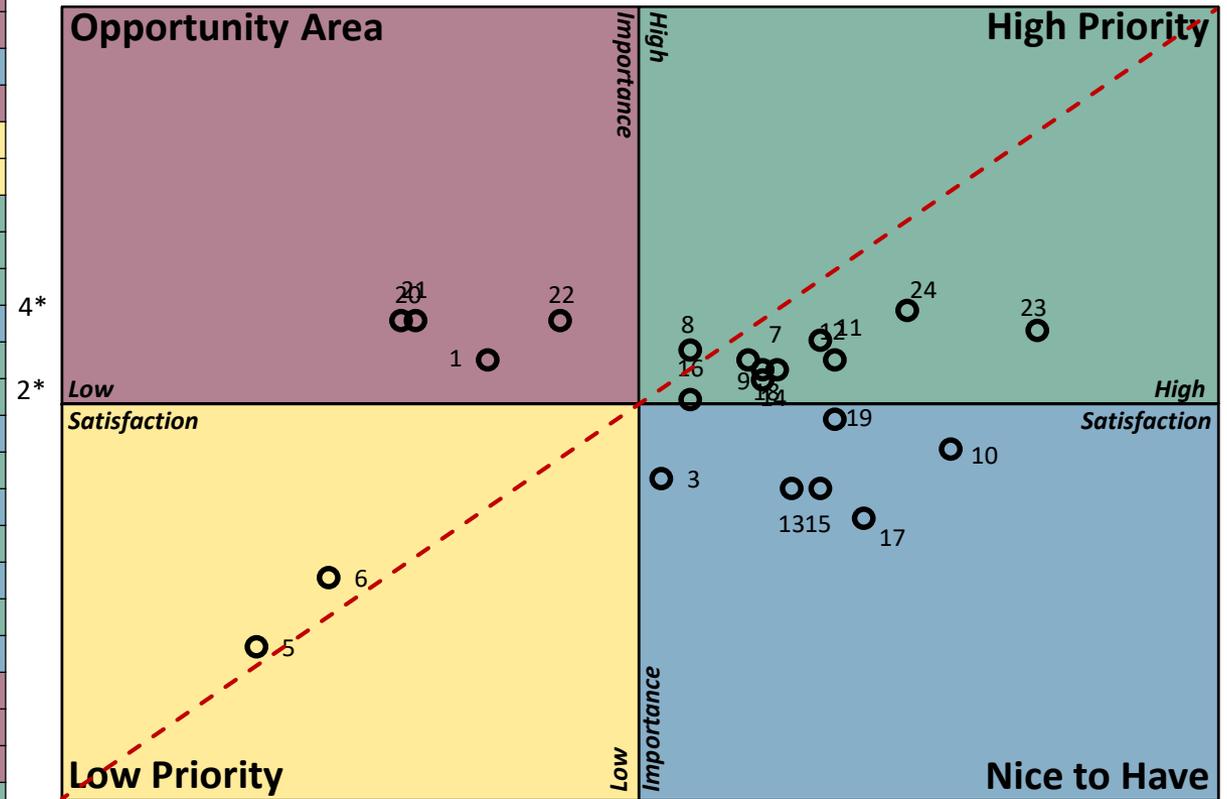
## Gap Analysis: Seattle/Bremerton - 2018



**Seattle/Bremerton Opportunity Areas:** Much more so than in past years, terminal bathroom cleanliness (4), and terminal comfort (2) are by far the key opportunity areas. Ferry bathrooms(21), vessel maintenance (22), and cleanliness of seating areas (20) are also opportunity areas to improve.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=154-390)**



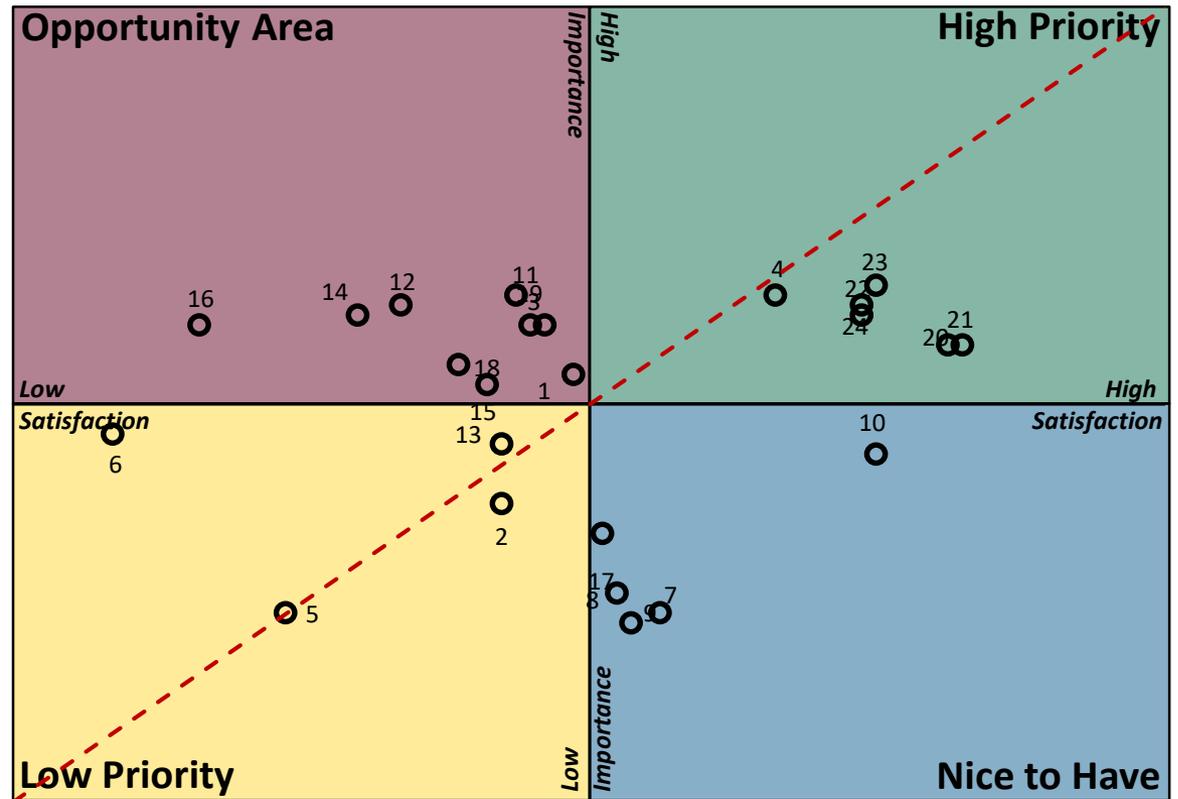
\* 4, 2 are outside of displayed graph area.



**Pt. Defiance/Tahlequah Opportunity Areas:** Providing clear loading instructions (16), loading efficiencies (14), and efficiently processes vehicles (12), are the biggest opportunities for improvement. Adequate parking near terminals (6) is also an opportunity area.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=64-113)**

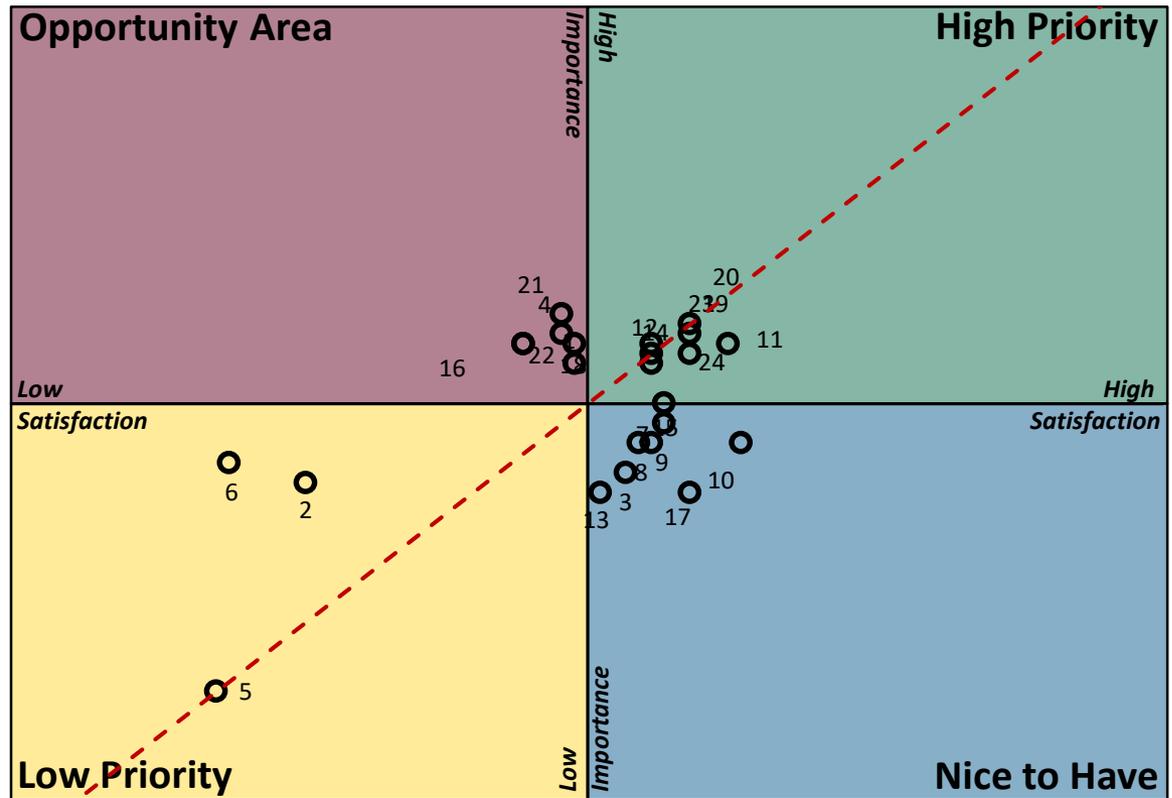




**Edmonds/Kingston Opportunity Areas:** *Opportunity Areas: The attributes generally have not changed much over the last three winters. However, parking availability (6), terminals are comfortable (2), and coordination with transit schedules (5) have improved over 2017.*

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated*
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=109-291)**



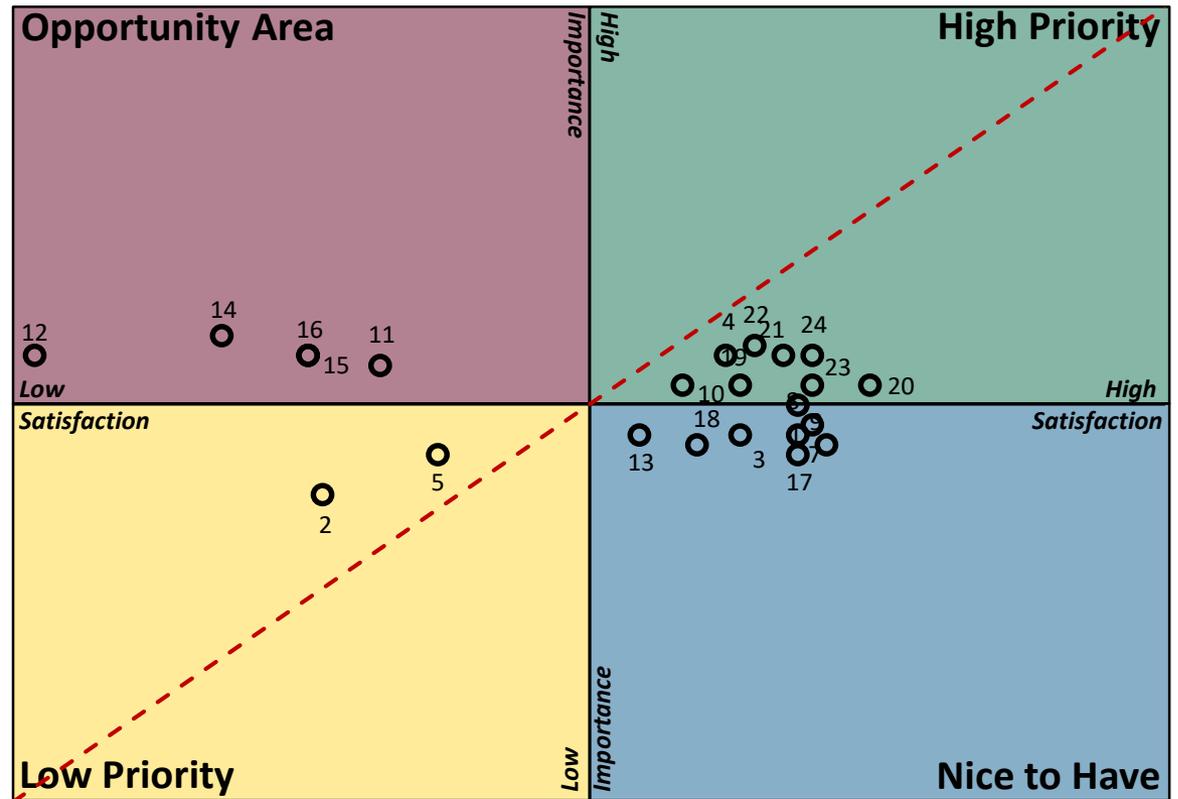
\* 5 is outside of displayed graph area.



**Fautleroy/Vashon Opportunity Areas:** Not much has changed from 2017. Efficiency of processing vehicles (12), loading procedures efficiency (14), loading crew's directions (16), loading ferries to capacity (15), and buying tickets easy and quick (11) are the biggest opportunity areas. Adequate parking near terminal (6) is rated worse than 2017.

Attribute Key
1 Terminals are clean
2 Terminals are comfortable
3 Terminal staff is helpful
4 Terminal bathrooms clean
5 WSF and transit schedules coordinated
6 Adequate parking near terminals*
7 Easy loading / unloading for walk-on
8 Passenger loading efficient
9 Passenger unloading efficient
10 Toll booth staff is friendly
11 Buying tickets easy and quick
12 Efficiently processes vehicles
13 Vehicle loading crew is friendly
14 Loading procedures efficient
15 Loads ferries to capacity
16 Loading crews provide clear directions
17 Unloading crew is friendly
18 Unloading procedures efficient
19 Unloading crews provide clear directions
20 Passenger seating areas are clean
21 Ferries bathrooms are clean
22 Vessels are well maintained
23 Vessel crew is friendly
24 Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=98-197)**



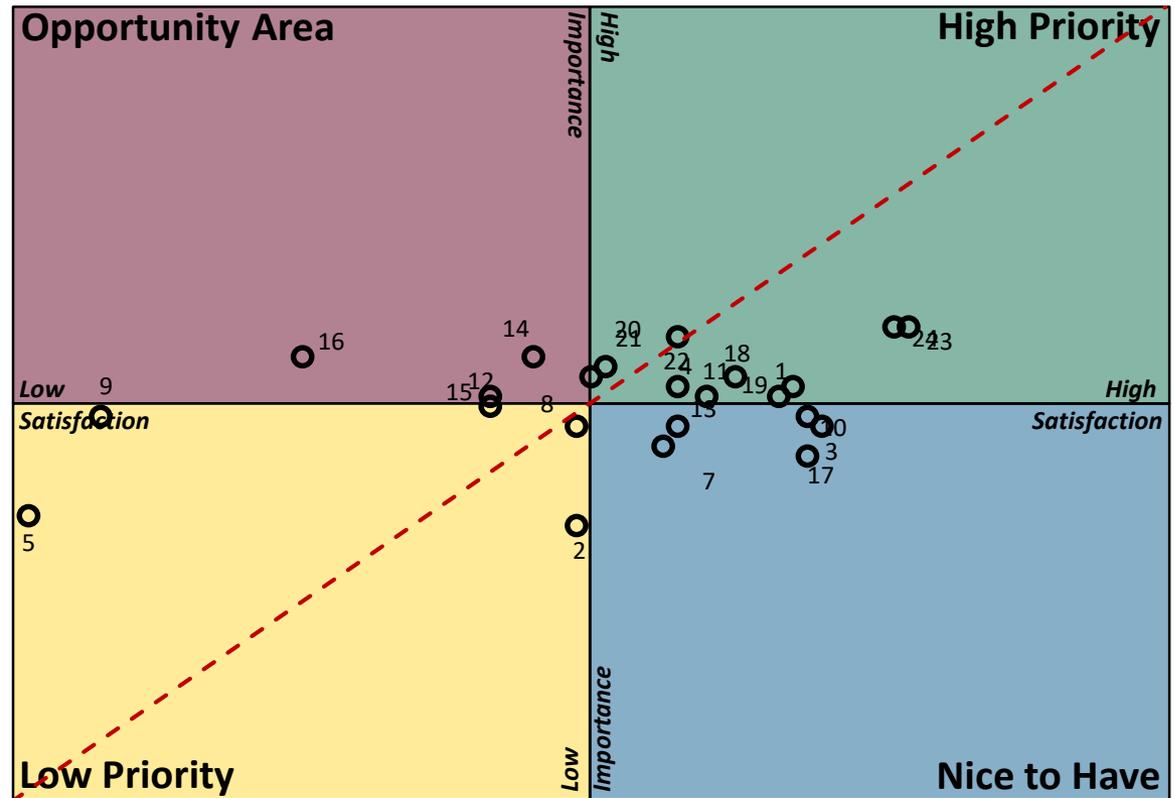
\* 6 is outside of displayed graph area.



**Fautleroy/Southworth Opportunity Areas:** Adequate parking (6), passenger unloading efficiency (9), and transit coordination (5) are considerably worse than in 2017. Those aspects plus loading crews providing clear directions (16) are the key opportunity areas.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals*
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=54-95)**



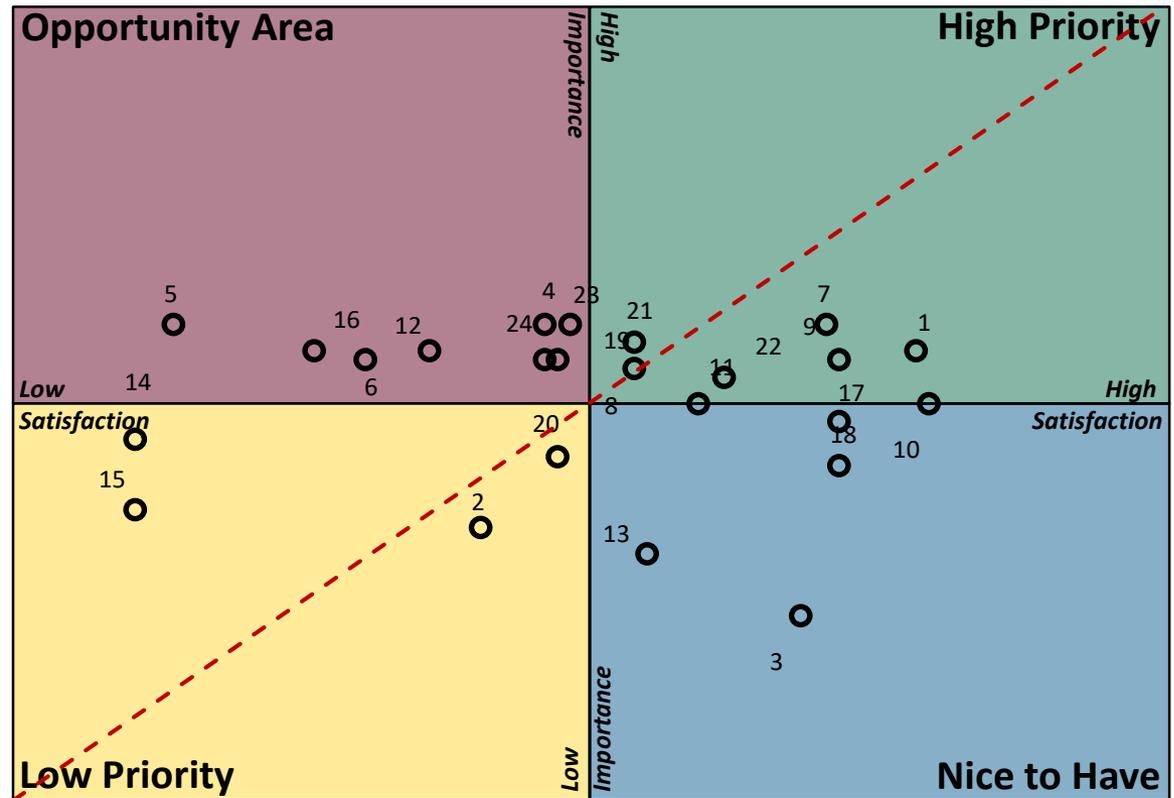
\* 6 is outside of displayed graph area.



**Southworth/Vashon Opportunity Areas:** Sample sizes are extremely small for this route. Coordination with transit schedules (5), loading procedure efficiency (14), and loading to capacity (15) appear to be the key opportunity areas.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=5-9)**

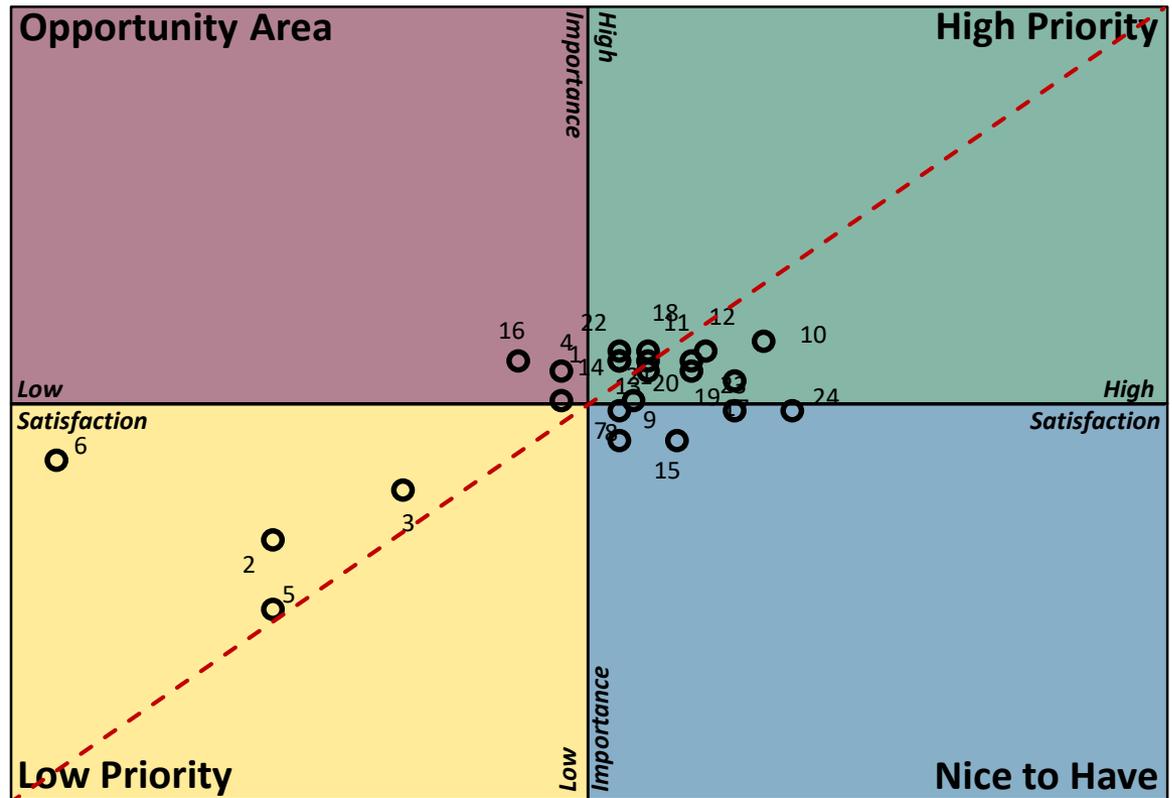




**Coupeville/Pt. Townsend Opportunity Areas:** The attributes have changed little from 2017. Adequate parking near terminal (6) is the key opportunity area. Terminals are comfortable (2) and loading crews provide clear directions (16) are not a high priority, but are slightly underperforming.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=40-129)**

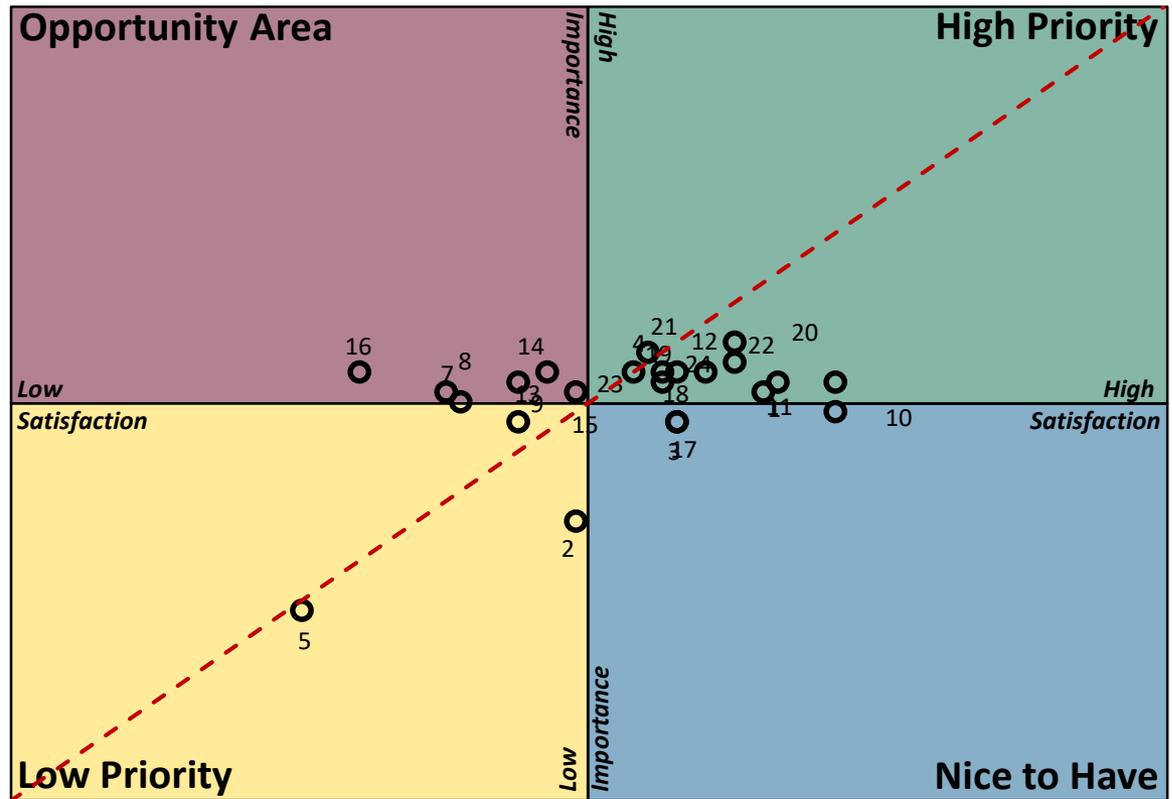




**Mukilteo/Clinton Opportunity Areas:** The attributes have not changed much over the last three years. Adequate parking near terminals (6) and loading crews providing clear directions (16) remain the key opportunity areas. Ease of loading and unloading (7) and passenger loading efficiency (8) are opportunities.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated
6	Adequate parking near terminals*
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

Satisfaction vs. Importance Ratings (n=170-483)



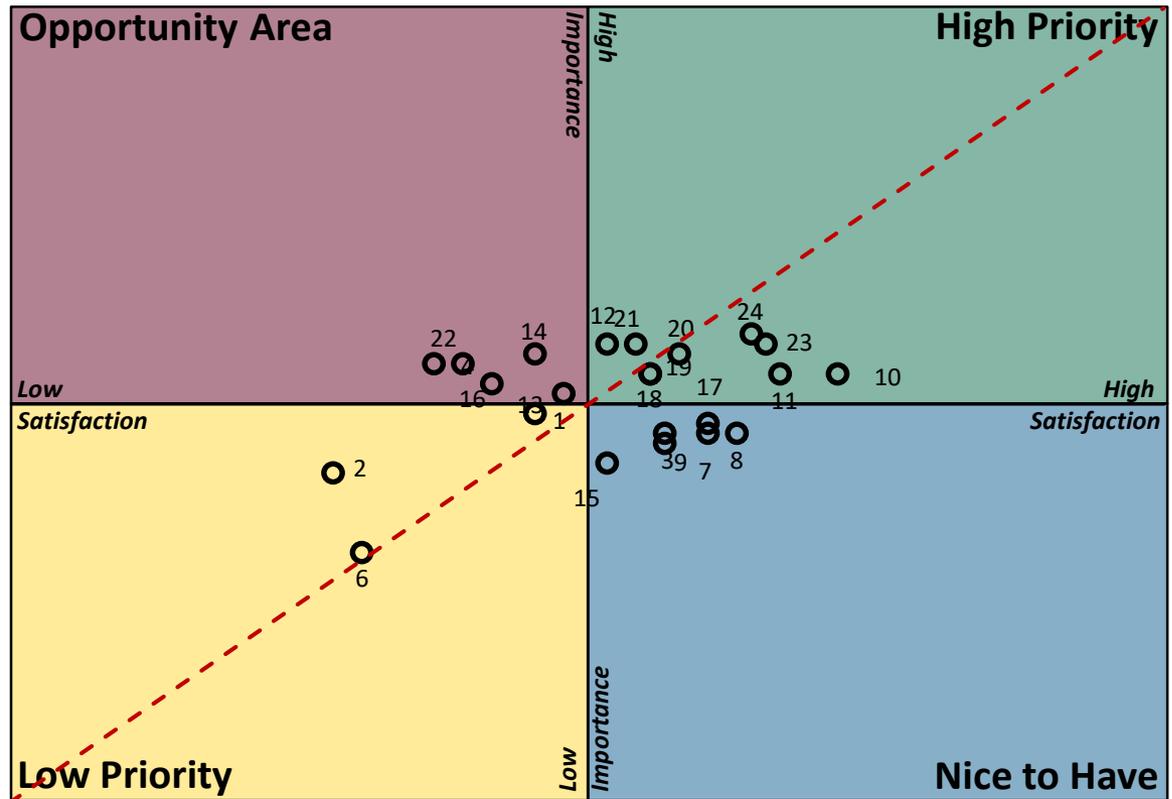
\* 6 is outside of displayed graph area.



**Anacortes/San Juan Islands Opportunity Areas:** The attributes have changed little since 2017. Well maintained vessels (22), terminal bathrooms clean (4), and loading crews provide clear directions (16) remain the key opportunity areas. Of lesser importance but still underperforming is transit schedule coordination (5).

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated*
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=408-975)**



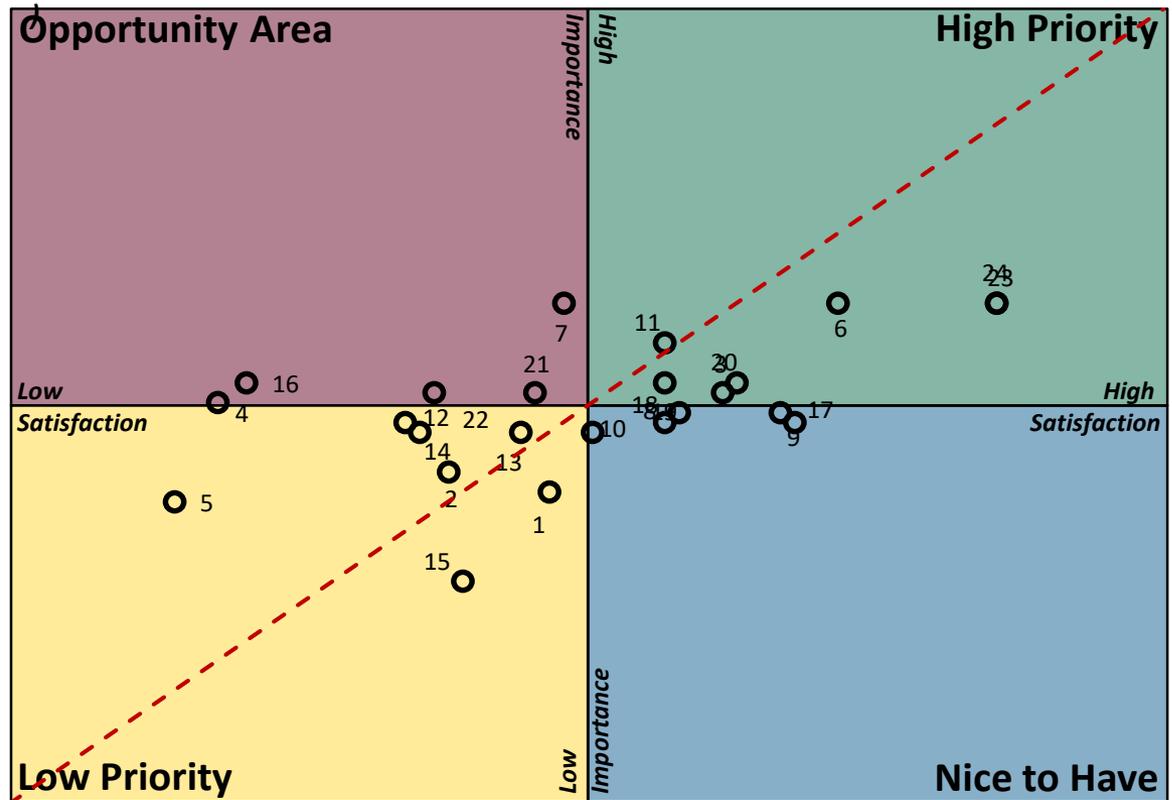
\* 5 is outside of displayed graph area.



**San Juan Interisland Opportunity Areas:** Clear loading crew directions (16), terminal bathroom cleanliness (4) and well maintained vessels (22) remain the biggest opportunity areas followed by coordination with transit schedules (5).

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal staff is helpful
4	Terminal bathrooms clean
5	WSF and transit schedules coordinated*
6	Adequate parking near terminals
7	Easy loading / unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

**Satisfaction vs. Importance Ratings (n=34-60)**



# Winter WSF Performance

## The Terminals are Comfortable



*Dissatisfaction continues to be the highest in Seattle/Bainbridge (35%) followed by Seattle/Bremerton (28%) for terminals are comfortable\*. The vast majority of that dissatisfaction is for the Seattle terminal.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		2122	514	178	46	196	192	80	18	103	293	456	41
The terminals are comfortable (seating, temperature, etc.)	Imp. (4-5)	84%	87%	90%	78%	81%	83%	78%	77%	80%	81%	84%	83%
	Sat. (4-5)	46%	33%	23%	62%	54%	51%	72%	60%	63%	74%	53%	62%
	Dissat. (1-2)	23%	35%	28%	22%	17%	15%	8%	20%	6%	8%	15%	10%
2017	Dissat.	17%	22%	26%	18%	16%	11%	7%	0%	2%	8%	18%	10%
Change	Dissat.	+6	+13	+2	+4	+1	+4	+1	+20	+4	-	-3	-

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals	
Seattle	75%
Bainbridge	12%
Fauntleroy	12%
Vashon	6%
Kingston	5%

Example of Verbatim Complaints – (complete sorted verbatims in separate document)
<b>Anacortes</b> - The terminals are not user friendly. I have watched visitors who were confused and frustrated by not being able to either get service (due to staff cut backs) or not able to easily see instructions. So embarrassing.
<b>Anacortes</b> - That terminal should have been replaced years ago. Uncomfortable seating. Drafty. Unpleasant atmosphere. Poor lighting. Overall very unpleasant, outdated, and depressing.
<b>Seattle</b> - holding/waiting area chairs are incredibly uncomfortable and not conducive to either privacy or socializing. Sometimes you are stuck there for an hour waiting, especially at night when you're also tired.
<b>Seattle</b> - The reduction of tables, chairs and general seating which is an obvious attempt to run people without homes out of the ferry terminal is troubling. Not only are the signs indicating areas restricted only to ticketholders unfriendly to those who do ride
<b>Seattle</b> - is pretty limited and not very comfortable nor particularly clean and the terminal is not well-heated. Waiting more than 20 minutes at night in the winter at Colman Dock is a pretty big bummer.
<b>Fauntleroy</b> - Come on. The terminal is very small and way past outdated. Very uncomfortable seating, bathroom is small and always a mess. The exit through turnstiles door is always open, making it cold and uncomfortable in the terminal.
<b>Fauntleroy</b> - The seating in this terminal is very uncomfortable for my bad back, and when walking on my back is already cranky from carrying bags. I would prefer a variety of bench styles so people could choose.

Attribute Key Code - 2  
Overall Gap Analysis:  
Low Priority Area

# Winter WSF Performance

## Help/Assistance From Terminal Staff

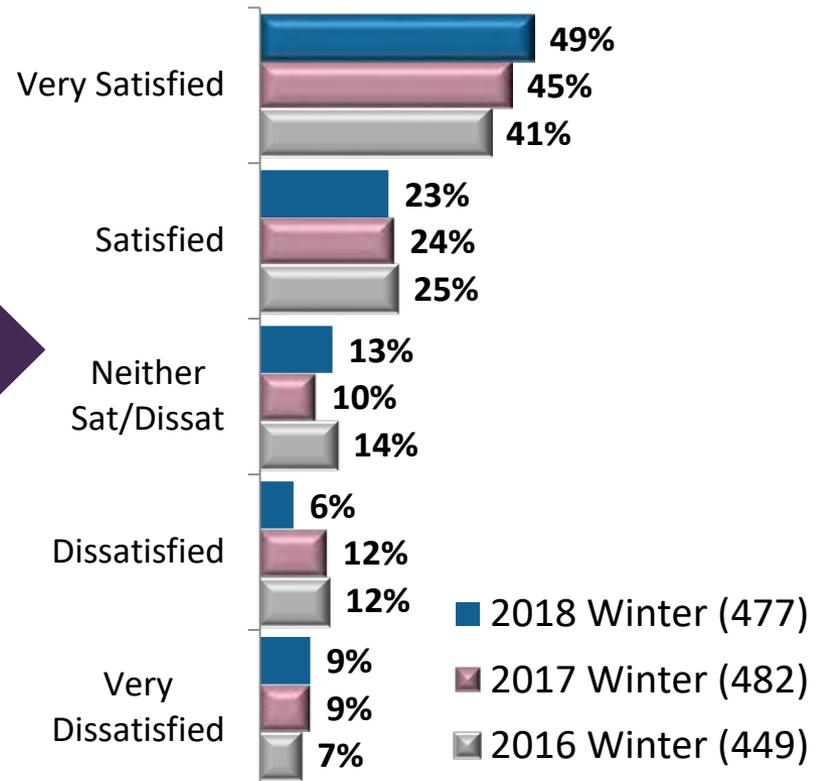


About one in five riders have asked the terminal staff for help (21%) and most (72%) say they are satisfied with the assistance they received. Just one in six (15%) of those were dissatisfied with the terminal staff performance.

**Asked WSF Terminal Staff For Help / Assistance**



**Satisfaction With WSF Terminal Staff Help / Assistance**



Q100. Did you specifically ask a WSF terminal staff member for help/assistance during the Winter period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018)?

Q101. How satisfied were you with the help/assistance the WSF terminal staff member gave you?

# Winter WSF Performance

## Terminal Bathrooms Clean & Well Maintained



*Dissatisfaction is highest for Seattle/Bainbridge (35%) and Seattle/Bremerton (32%) followed by Anacortes/San Juan (13%) and Edmond/Kingston (11%)\*. The Seattle terminal continues to receive the vast majority of negative mentions.*

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	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents		2122	514	178	46	196	192	80	18	103	293	456	41
The bathrooms in the terminals are clean and well maintained	Imp. (4-5)	96%	96%	96%	99%	95%	97%	92%	100%	97%	96%	93%	90%
	Sat. (4-5)	55%	37%	20%	81%	71%	79%	79%	67%	83%	78%	64%	46%
	Dissat. (1-2)	21%	35%	32%	13%	11%	7%	3%	3%	1%	7%	13%	18%
2017	Dissat.	20%	30%	35%	20%	13%	7%	6%	0%	5%	8%	15%	12%
Change	Dissat.	+1	+5	-3	-7	-2	-	-3	+3	-4	-1	-2	+6

*\*Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	
Seattle	82%
Bremerton	11%
Edmonds	4%
Anacortes	4%
Bainbridge	4%

### Example of Verbatim Complaints – (complete sorted verbatims in separate document)

- Anacortes** - The toilets are clean at the terminal but they are cramped, cold and really need to be overhauled, just as the whole terminal needs attention.
- Bremerton** - The bathroom always stinks like someone has been smoking pot in it overnight. Also one or more of the stalls has been closed due to vandalism quite a bit. Lately a guard has been on duty in the terminal so it hasn't been as bad.
- Edmonds** - Bathrooms are frequently dirty, toilets dirty and no towels to dry your hands, just the useless air dryers.
- Faultleroy** - No noticeable heat. Women's bathroom door always propped open and the men's is always closed. Not a comfortable feeling that everyone in the lobby can hear your personal business (females) and males personal business remains personal.
- Mukilteo** - The bathrooms always smells like there is a pool of urine in there. Summertime when the window is open and the fan is supposed to be on it smells. Winter time with the windows closed it smells. It just always smells awful in there.
- Point Defiance** - Reopen and maintain the bathrooms! It is ridiculous there is no restroom at the terminal. Porta Potties are not acceptable for such a public use area.
- Seattle** - This is all being improved so really at this point doesn't matter, but the Seattle bathrooms are filthy and scary and I hate to have to use them and mostly will wait till I'm on the ferry
- Seattle** - Paper towels and water all over the place. Filled toilets. In general, I avoid the Seattle terminal restroom unless absolutely necessary. Other terminal bathrooms are generally satisfactory.

Attribute Key Code - 4  
Overall Gap Analysis:  
Opportunity Area

# Winter WSF Performance

## Sailing Schedule Coordinated w/Transit



*Dissatisfaction is highest for Anacortes/San Juan Island (36%) followed by Seattle/Bremerton (25%)\*. All routes except Seattle/Bainbridge (7%) and Port Townsend/Coupeville (5%) received double digit dissatisfaction scores.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1786	498	179	44	198	149	61	15	53	255	291	43
WSF sailing schedule is adequately coordinated with transit services available at the terminal	Imp. (4-5)	69%	67%	65%	67%	60%	87%	79%	100%	73%	72%	75%	80%
	Sat. (4-5)	51%	58%	42%	47%	47%	59%	34%	36%	63%	55%	26%	43%
	Dissat. (1-2)	14%	7%	25%	27%	15%	15%	13%	26%	5%	12%	36%	15%
2017	Dissat.	13%	10%	13%	23%	19%	13%	18%	0%	2%	6%	36%	44%
Change	Dissat.	+1	-3	+12	+4	-4	+2	-5	+26	+3	+6	-	-29

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)
Seattle	42%	<b>Anacortes</b> - 1. Poor coordination with airport shuttle; 2. First ferry of the morning from Orcas gets in too late to catch Amtrak in Mt Vernon although Lopez and Friday Harbor generally do; 3. Only fair coordination with transit.
Fauntleroy	13%	<b>Anacortes</b> - Air porter to/ from SeaTac schedule does not change, but ferry schedule does. Sometimes the schedule is convenient, while other times it is VERY inconvenient. It would be nice to coordinate with them.
Bremerton	11%	<b>Bremerton</b> - Ferry arrives in Bremerton at 3:50PM. Kitsap Transit buses designated as 'ferry take home' sit at the ferry terminal until 4:05. Other 'ferry take home' for the later ferry runs leave the terminal as soon as the walk off ramps are clear.
Anacortes	9%	<b>Bremerton</b> - I use Kitsap Transit bus #24 to/from the ferry terminal in Bremerton. Some times the bus is scheduled to meet and leave the terminal at the exact time the ferry is scheduled to arrive, so causing me to have to wait an hour to catch the next one.
Mukilteo	8%	<b>Fauntleroy</b> - Coordination with the c line bus to downtown from Fauntleroy is poor. Bus is often seen leaving the stop during the passenger unloading process requiring up to a 25 minute wait on weekends for the next bus. <b>Seattle</b> - the Chimacum is ALWAYS late- ALWAYS! People cannot consistently show up late for work, and it is unreasonable to have to take the earlier ferry just because a crew cannot keep a schedule. <b>Seattle</b> - The ferry arrives with barely enough time for me to make the 550 bus in the bus tunnel. If we are late, or passengers are slow unloading I miss it. Although this bus runs every ten minutes, traffic ten minutes later makes me 20-30 minutes later to work.

Attribute Key Code - 5  
Overall Gap Analysis:  
Low Priority Area

# Winter WSF Performance

## Adequate Parking Near Terminals



*Dissatisfaction is highest for Mukilteo/Clinton (57%) and Fauntleroy/Vashon (55%) followed by Seattle/Bremerton (30%)\*. All routes (except San Juan Inter-Island) performed poorly on adequate parking near terminal.*

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	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents		1786	498	179	44	198	149	61	15	53	255	291	43
There is adequate parking near the terminals	Imp. (4-5)	77%	72%	72%	85%	83%	76%	88%	96%	88%	86%	76%	100%
	Sat. (4-5)	39%	44%	47%	35%	48%	17%	26%	51%	48%	19%	55%	89%
	Dissat. (1-2)	30%	19%	30%	41%	20%	55%	23%	29%	30%	57%	10%	0%
2017	Dissat.	30%	19%	24%	34%	25%	45%	17%	46%	43%	58%	20%	10%
Change	Dissat.	-	-	+6	+7	-5	+10	+6	-17	-13	-1	-10	-10

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals	Example of Verbatim Complaints – (complete sorted verbatims in separate document)
Seattle 24%	<b>Bainbridge</b> - The upper parking lot (the cheap one) is cramped and hard to get in and out of. The concrete is broken and needs repair.
Mukilteo 23%	<b>Bainbridge</b> - The lots are full after the 11:30am sailing. There is then NOWHERE legal to park. <b>Clinton</b> - There is a long walk down - or, when returning, up - a steep hill to get to the nearest public parking lot.
Bainbridge 18%	<b>Clinton</b> - The pay parking at the Clinton terminal went up-- there is no where reasonably close to park and it is difficult to meet and pick up passengers off the ferry.
Fauntleroy 17%	<b>Coupeville, Mukilteo</b> - Not enough spaces to leave your car on the Coupeville ferry side. It used to be possible to leave a car on the receiving end and not have to wait in ferry lines on the Mukilteo ferry. All the good parking is gone from Mukilteo.
Bremerton 15%	<b>Edmonds</b> - There is nominal parking for ferry riders and the cost is high. Sounder has free parking and has taken over the majority of parking within a reasonable distance. <b>Mukilteo</b> - Specifically, because there is NO parking at Mukilteo. Family members who wanted to come to our house for Easter had to cancel because the lines were so long and there was NO PARKING ANYWHERE. <b>Seattle, Bainbridge</b> - There's nothing there. What there is, is outrageously expensive. On Bainbridge, there's a sea of spaces, all full, and again, much too expensive considering how terrible the options for public transportation are.

Attribute Key Code - 6  
Overall Gap Analysis:  
Low Priority Area

# Winter WSF Performance

## Efficiently Process Vehicles



*Dissatisfaction is highest for Fauntleroy/Vashon (45%) and Southworth/Fauntleroy (19%) \*. The Fauntleroy terminal is cited by the vast majority of dissatisfied riders.*

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	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF efficiently processes vehicles through ticket lanes	Imp. (4-5)	96%	97%	94%	98%	94%	97%	90%	97%	97%	96%	97%	88%
	Sat. (4-5)	73%	76%	82%	55%	81%	31%	66%	56%	92%	83%	72%	59%
	Dissat. (1-2)	12%	10%	6%	31%	7%	45%	19%	15%	1%	4%	10%	21%
2017	Dissat.	12%	10%	4%	11%	5%	47%	22%	57%	4%	7%	13%	3%
Change	Dissat.	-	-	+2	+20	+2	-2	-3	-42	-3	-3	-3	+18

*\*Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	Example of Verbatim Complaints – (complete sorted verbatims in separate document)
Fauntleroy 53%	<b>Anacortes</b> - Ticket booth attendants can be overly chatty, even when there are long lines. I don't think this should be the place for tourists to get travel info. I appreciate friendly, polite attendants, but several are way too chatty when there are line ups.
Seattle 24%	<b>Anacortes</b> - Not impressed with customer service. Staff is not friendly. Why do you have a second booth after I have paid to tell me what lane to get into? Is the Union driving this staffing? Totally a waste of tax payer money during the winter months.
Bainbridge 10%	<b>Bremerton</b> - There are multiple booths but I only ever see one in use. There's always a backup and a worry they won't get through everyone in time.
Edmonds 8%	<b>Clinton</b> - Wish we could have a single lane. Very aggravating to get in a lane where someone doesn't have the money, can't find their credit card, talks too much with the ticket taker while the other lane has processed 5 cars and you end up missing the boat.
Anacortes 6%	<b>Fauntleroy</b> - WSF staff waves cars along without signage or ?- you don't know what they want you to do and they act frustrated if you don't know what their waving arms mean.
	<b>Fauntleroy</b> - WSF require that all cars have their ticketed manually validated (checked) before boarding. WSF does NOT at Fauntleroy accommodate this action to take place for one full ferry load, causing traffic at booth to stand still and severe backup.
	<b>Fauntleroy</b> - Everyone has to stop at the toll booth even if they already have a ticket. The agents don't just swipe the ticket; they also give you a receipt. It just isn't necessary and takes time.
	<b>Fauntleroy</b> - Drivers with prepaid tickets or passes are processed through the same booth as drivers without tickets. This creates a bottleneck at the booth and often, boats sail only partially full with a long line of cars up Fauntleroy Way.

Attribute Key Code - 12  
Overall Gap Analysis:  
High Priority Area

# Winter WSF Performance

## Vehicle Loading Efficiency



*Dissatisfaction is highest for Fauntleroy/Vashon (29%) and Fauntleroy/Southworth (15%) followed by Anacortes/San Juan Islands (10%)\*. Fauntleroy terminal is cited the most.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF vehicle loading procedures are efficient	Imp. (4-5)	95%	95%	93%	97%	93%	99%	95%	87%	98%	96%	96%	87%
	Sat. (4-5)	73%	82%	77%	52%	81%	44%	69%	33%	87%	72%	67%	60%
	Dissat. (1-2)	10%	6%	7%	26%	6%	29%	15%	24%	4%	7%	10%	13%
2017	Dissat.	10%	8%	9%	11%	7%	24%	10%	2%	6%	9%	14%	12%
Change	Dissat.	-	-2	-2	+15	-1	+5	+5	+22	-2	-2	-4	+1

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints – (complete sorted verbatims in separate document)	
Fauntleroy	42%	<b>Anacortes</b> - The results of loading procedures are inefficient because drivers are unable to exit their car easily. Its presents a safety hazard when someone can not get out of their car because large vehicles such as SUV and Trucks are parked next to each other.	<b>Anacortes</b> - Understanding the importance of schedules- at times the loads seem too rushed and space is not used effectively.
Seattle	17%	<b>Coupeville</b> - Ramp was not adjusted properly resulting ramp hitting underside of car	<b>Coupeville, Port Townsend</b> - For some reason, the deck loading crew on this run seem to be 'bossy' and 'short tempered' yelling at drivers after confusing them using erratic hand signals and often in situations where more than one person is directing without coordination to each other.
Mukilteo	12%	<b>Edmonds, Kingston</b> - Do not understand why they always wait until 10 mins before sailing to load cars when there is usually more time to do so. The staff on the docks and on the boats should have LIGHTED guide sticks like airport workers so their directions can be clearly understood.	<b>Fauntleroy</b> - Southworth bound vehicles often can't get to loading area so partially empty ferries leave, and we sit on the street, often for long times.
Bainbridge	11%	<b>Fauntleroy</b> - Vashon is favored over Southworth . Vashon has 3 plus lanes Southworth has 1. Vashon are pulled around Southworth people waiting to fill shared boat . Vashon cars are loaded off street leaving cars already passed booth on dock not loaded	<b>Seattle, Bainbridge</b> - On more than one occasion I had missed the ferry by a couple of cars. When the next ferry loaded, the WSF workers did not start loading with the car that they left off on with the last ferry. This is not fair.
Edmonds	11%		

Attribute Key Code - 14  
Overall Gap Analysis:  
High Priority Area

# Winter WSF Performance

## Loads Ferries to Capacity



*Dissatisfaction is highest for Fauntleroy/Vashon (27%) and Fauntleroy/Southworth (15%)\*. Southworth/Vashon (50%) received the highest negative score. Fauntleroy terminal is cited most often.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3189	524	174	80	351	257	127	18	127	517	954	60
WSF loads ferries to capacity with little room between vehicles	Imp. (4-5)	90%	89%	81%	90%	89%	97%	91%	79%	90%	94%	85%	72%
	Sat. (4-5)	73%	76%	81%	61%	82%	50%	66%	33%	91%	74%	72%	63%
	Dissat. (1-2)	10%	7%	4%	22%	6%	27%	15%	50%	5%	7%	8%	16%
2017	Dissat.	10%	11%	8%	15%	4%	22%	14%	45%	4%	10%	9%	8%
Change	Dissat.	-	-4	-4	+7	+2	+5	+1	+5	+1	-3	-1	+8

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals	
Fauntleroy	45%
Seattle	22%
Mukilteo	13%
Bainbridge	13%
Edmonds	11%

### Example of Verbatim Complaints – (complete sorted verbatims in separate document)

- All-of-them** - I think a ferry crew member should guide drivers to pull forward tight against the vehicle in front of them. This only occasionally happens, usually there is no guidance and drivers leave too much space between vehicles.
- Edmonds** - Deck hands used to guide each car up tight to the car in front of them, lately they let people stop on their own leaving lots of room. I walked the main deck one day and they could have gotten at least 2 more cars in each row if they parked efficiently.
- Fauntleroy** - Boats regularly leave half empty when the dock is full but the booths aren't processing vehicles fast enough.
- Fauntleroy** - It is extremely infuriating to see a boat get underway that is less than full when there are multiple cars still on the dock. In my opinion insisting that the WSF adhere to 'on time' metrics at the expense of 'moving people and vehicles' metrics is wrong.
- Friday Harbor** - Can not get out of our large pickup unless we now tell them we will not park too close to the wall and we have to be able to get out on both sides. They are usually rude when we tell them no we will not park right up against the wall.
- Lopez, Anacortes** - If there is less room between cars and all available legal space is utilized, fewer cars would be left behind. Some loaders are VERY good. Some are not good at all.
- Seattle** - Noted that when tourists (cars with out of state plates) were loading, deck workers were not directing them in parking, or parking closely to other vehicles-and this was during winter season, not spring or summer peak times.
- Seattle** - Seems they are under pressure just to get the cars on as quickly as possible so the boat can leave

Attribute Key Code - 15  
Overall Gap Analysis:  
Nice To have Area

# Winter WSF Performance

## Vehicle Loading Crews Provide Clear Directions



*Dissatisfaction continues to be highest for Fautleroy/Vashon (21%) followed by Mukilteo/Clinton (15%), Anacortes/San Juan Islands (15%), and Fautleroy/Southworth (13%)\*. Seattle and Fautleroy are the most cited terminals.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
	<b>Respondents</b>	3189	524	174	80	351	257	127	18	127	517	954	60
WSF vehicle loading crews provide clear directions / hand signals	<b>Imp. (4-5)</b>	<b>95%</b>	95%	90%	96%	95%	97%	95%	97%	98%	96%	95%	92%
	<b>Sat. (4-5)</b>	<b>64%</b>	72%	72%	41%	71%	50%	53%	47%	80%	59%	62%	48%
	<b>Dissat. (1-2)</b>	<b>13%</b>	12%	5%	24%	9%	21%	13%	17%	5%	15%	15%	23%
	<b>2017 Dissat.</b>	<b>13%</b>	10%	9%	14%	7%	22%	17%	12%	11%	16%	15%	8%
	<b>Change Dissat.</b>	<b>-</b>	<b>+2</b>	<b>-4</b>	<b>+10</b>	<b>+2</b>	<b>-1</b>	<b>-4</b>	<b>+5</b>	<b>-6</b>	<b>-1</b>	<b>-</b>	<b>+15</b>

*\*Among those routes that have a substantial number of respondents.*

Top 5 Unsatisfactory Terminals	
Seattle	25%
Fautleroy	24%
Bainbridge	17%
Mukilteo	17%
Clinton	16%

### Example of Verbatim Complaints – (complete sorted verbatims in separate document)

- Anacortes** - crew needs to look at the car they are directing so we know who they are directing.
- Anacortes** - You really have to watch because they will signal one way then change their minds and have you go another.
- Anacortes** - Yelling at vehicles with closed windows surrounded by running engines is ineffective. Clear, unambiguous hand signals should be used.
- Bainbridge** - On many occasions, the traffic director is not paying direct attention to the loading vehicles. Sometimes, the loader delays a vehicle, causing the driver to miss the sailing when room existed on the vessel.
- Bainbridge** - Not all were wearing orange or yellow gloves. Very distracting to drive on the ferry. Drive into a dark ferry from daylight. Hard to see hand directions if bright gloves not being worn. Or, lighted arrows.
- Coupeville, Port Townsend** - For some reason, the deck loading crew on this run seem to be 'bossy' and 'short tempered' yelling at drivers after confusing them using erratic hand signals and often where more than one person is directing.
- Fautleroy** - When the sun is right in the eyes of the driver, the workers can't figure out their little gestures are not visible.
- Fautleroy** - We sometimes don't know what they want. They get really mad when we guess wrong including hitting the car.
- Friday Harbor, Anacortes** - Hand signals not clear and ferry worker giving the signals acting angry with driver when the driver couldn't figure out his signals.
- Mukilteo, Clinton** - The new gloves with red palms help BUT they do not have consistent signals which is very poor training. They are impatient and they yell at you.

Attribute Key Code - 16  
Overall Gap Analysis:  
Opportunity Area

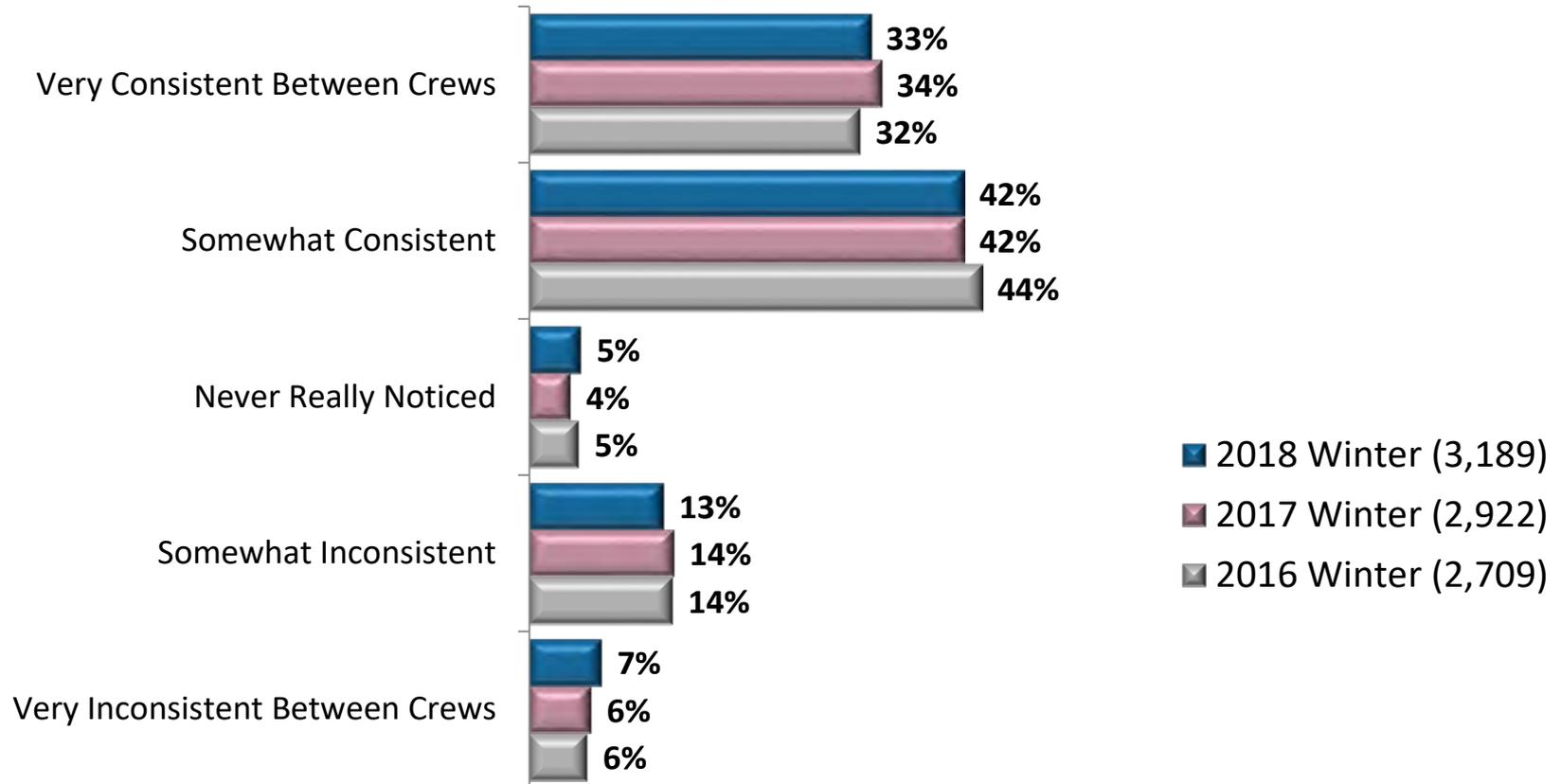
# Winter WSF Performance

## Consistent Hand Signals/Directions



*Most riders (75%) continue to say the loading/unloading crews hand signals/directions are consistent across crews. About one in five (20%) over the last three years continue to say they are not consistent.*

### Consistency of Hand Signals Asked Of Vehicle Drivers Only



Q97. (ASKED OF VEHICLE DRIVERS ONLY) How would you rate the consistency of the vehicle loading/unloading hand signals/directions you get from the different ferry/dock crews?

# Winter WSF Performance

## Passenger Seating Areas Clean and Comfortable



*Dissatisfaction continues to be highest for Seattle/Bremerton (23%)\*. The Kaleetan is cited most often.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3305	606	230	70	351	249	132	20	129	483	975	60
The ferry passenger seating areas are clean and comfortable (seating, temperature, etc.)	Imp. (4-5)	96%	97%	98%	94%	97%	94%	93%	85%	98%	95%	96%	91%
	Sat. (4-5)	81%	82%	52%	94%	84%	89%	73%	66%	89%	92%	77%	81%
	Dissat. (1-2)	5%	3%	23%	2%	6%	2%	5%	9%	1%	1%	7%	5%
2017	Dissat.	4%	3%	15%	1%	3%	2%	1%	0%	2%	1%	6%	7%
Change	Dissat.	+1	-	+8	+1	+3	-	+4	+9	-1	-	+1	-2

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Vessels		Example of Verbatim Complaints – (complete sorted verbatims in separate document)
Kaleetan	43%	<b>Cathlamet</b> - Spilled liquid had dried on to seat. Large, 2 foot area on seat. Also, tables tend to be gross, especially after the school commuters use the ferry.
Chimacum	25%	<b>Chelan, Hyak, Elwha</b> - The tables are dirty, and the areas are not swept regularly. Someone should wipe down the table areas.
Wenatchee	18%	<b>Chetzemoka</b> - The area doesn't always appear clean.... spills dirty/messy with cup marks and floors not appear washed.
Tacoma	14%	<b>Chimacum</b> - is a substandard boat. The women's restroom stalls are not adequately supported with stability bars to the ceiling, causing the entire 20 foot row to warp and multiple doors no longer work. This is substandard construction.
Puyallup	12%	<b>Hyak, Yakima</b> - Tables and benches seldom cleaned thoroughly between sailings, benches often have footprints on them, heat not always working well in winter, air in cabin often stale.
		<b>Issaquah, Tillikum, Elwha</b> - dirty bathrooms, garbage on the floor in the main cabin.
		<b>Kaleetan</b> - Restrooms are gross. Floors in the passenger cabin are dirty/soiled. Crew just walk around and you never see them with a mop or broom. Just the opposite on the Chimacum. Crews cleaning!
		<b>Kaleetan</b> - Sometimes the seats or tables are dirty to the point where you can't sit there.
		<b>Samish</b> - Brand new ferry - almost the pride of the fleet, and the bench seats along the windows are EXTREMELY uncomfortable.
		<b>Samish</b> - Don't know what is causing it, but the heating system on the Samish is truly weird. We ride this boat more than any other and rarely is the heating system in balance. It seems to rotate around the boat and of course there are the usual stairwell drafts.

Attribute Key Code - 20  
Overall Gap Analysis:  
High Priority Area

# Winter WSF Performance

## Ferries Bathrooms are Clean/Maintained



*Dissatisfaction is highest for Seattle/Bremerton (12%) and Edmond/Kingston (10%) routes\*. The Puyallup is cited most often.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3305	606	230	70	351	249	132	20	129	483	975	60
The bathrooms on the ferries are clean and well maintained	Imp. (4-5)	98%	98%	98%	94%	98%	97%	94%	98%	99%	98%	97%	91%
	Sat. (4-5)	73%	70%	53%	93%	74%	83%	74%	72%	87%	79%	74%	68%
	Dissat. (1-2)	8%	9%	12%	4%	10%	4%	5%	7%	3%	5%	8%	5%
2017	Dissat.	7%	9%	16%	1%	7%	3%	4%	0%	2%	4%	7%	5%
Change	Dissat.	+1	-	-4	+3	+3	+1	+1	+7	+1	+1	+1	-

\*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Vessels	Example of Verbatim Complaints – (complete sorted verbatims in separate document)
Puyallup 35%	<b>Cathlamet</b> - The accessible stall in the ladies head has been out for monthes, I'm close to filing a complaint with the state regarding the ADA. Also, very tired of crew locking half of the stalls so they can't be used and won't need to be cleaned.
Wenatchee 33%	<b>Chelan, Hyak, Elwha</b> - There are usually a couple stalls that are out of service. Ferry stopped supplying tissue toilet seat covers and it just looks dirty.
Tacoma 29%	<b>Chelan, Yakima</b> - The bathroom stalls have dirty walls.
Walla Walla 25%	<b>Chetzemoka</b> - Bathroom always smells.
Spokane 22%	<b>Chimacum</b> - Bathroom stalls are marked with yellow caution tape - been this way for months
	<b>Chimacum</b> - where to begin.... Chimacum's men's restroom was filthy, one of the faucets didn't work, and there was no t.p. in the first stall I tried.
	<b>Elwha</b> - Urine on floor, no paper towels.
	<b>Elwha, Samish</b> - They smell like piss and at least one stall is always marked out of order
	<b>Elwha, Yakima</b> - Floors not clean. Lots of water around sinks, need better design and towels nearer. Locks loose or out of alignment, so go open while occupied. And some toilets flush while you are still on. What is a child supposed to do about reaching tissue?
	<b>Hyak, Elwha, Yakima</b> - The boats on the San Juan run have dirty women's bathrooms. Floor is mopped but never clean. Corner filthy. Even worse on a busy weekend.

Attribute Key Code - 21  
Overall Gap Analysis:  
High Priority Area

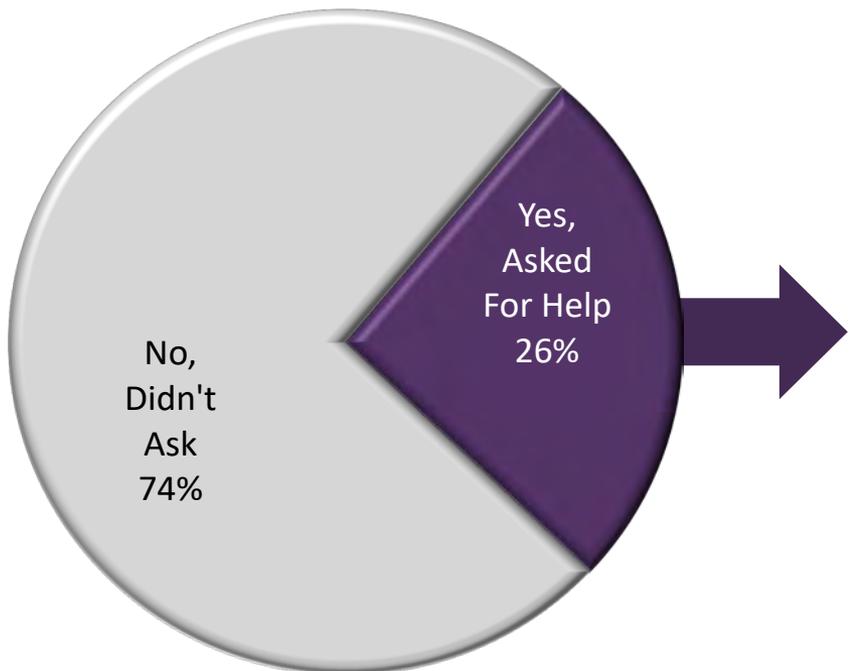
# Winter WSF Performance

## Help/Assistance From Vessel Staff

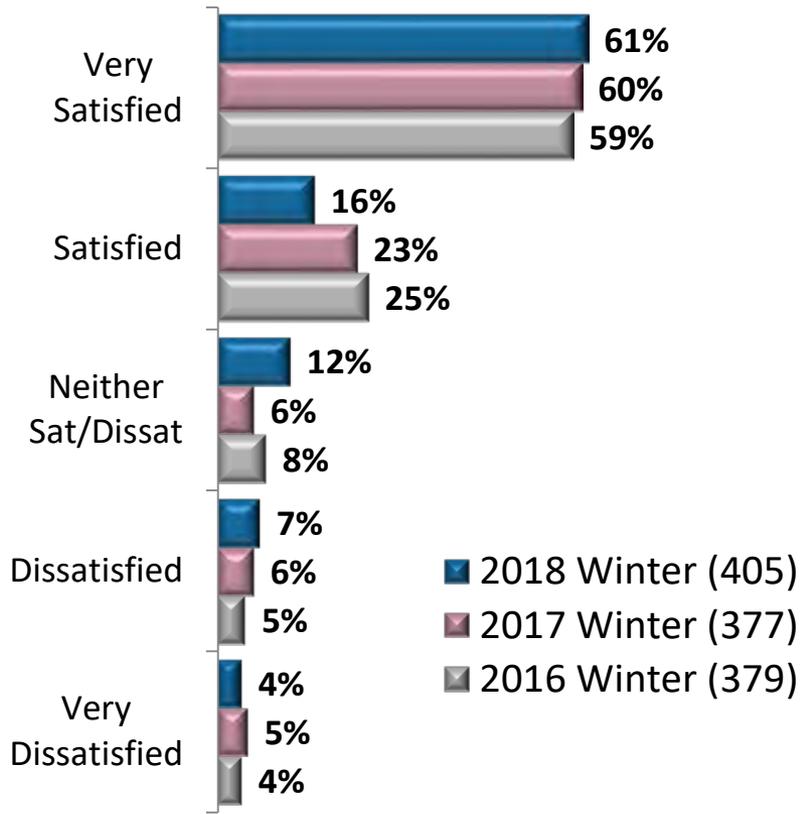


About one-in-four riders have asked the vessel staff for help (26%) and most (77%) were satisfied with the assistance they received. About one in ten (11%) continue to be dissatisfied with the vessel staff help/assistance.

**Asked WSF Vessel Staff For Help / Assistance**



**Satisfaction With WSF Vessel Staff Help / Assistance**



Q103. Did you specifically ask a WSF vessel staff member for help/assistance during the Winter period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018)?

Q104. How satisfied were you with the help/assistance the WSF vessel staff member gave you?

# Winter WSF Performance

## On Time Departures



*Dissatisfaction is highest for Fauntleroy/Vashon (24%), Seattle/Bremerton (17%), and Fauntleroy/Southworth (14%) routes\*. On-time departure dissatisfaction increased the most on the Seattle/Bremerton route.*

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3627	641	250	88	383	273	142	22	146	566	1053	63
WSF has on-time/dependable departures	Imp. (4-5)	97%	98%	98%	96%	97%	87%	97%	89%	99%	96%	98%	100%
	Sat. (4-5)	74%	77%	68%	60%	88%	40%	64%	53%	91%	81%	72%	81%
	Dissat. (1-2)	9%	6%	17%	14%	4%	24%	14%	19%	1%	7%	9%	2%
2017	Dissat.	8%	7%	4%	21%	3%	24%	13%	0%	4%	7%	10%	4%
Change	Dissat.	+1	-1	+13	-7	+1	-	+1	+19	-3	-	-1	-2

\*Among those routes that have a substantial number of respondents.

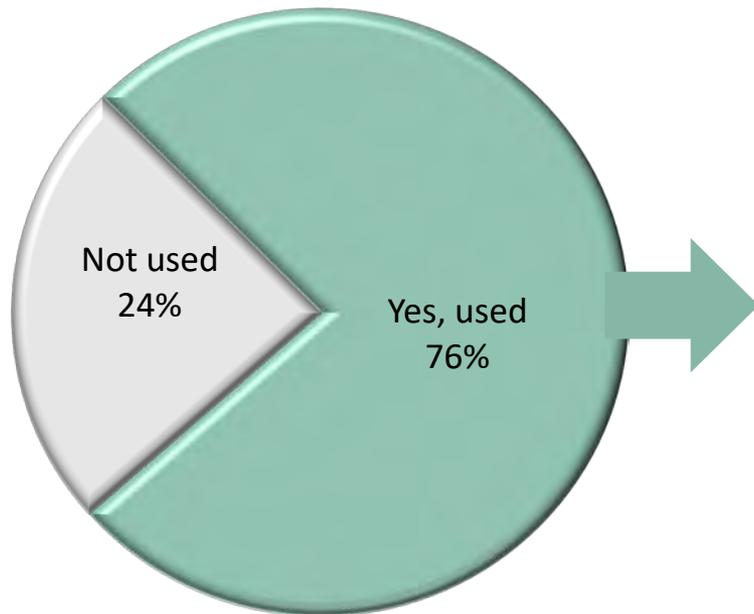
Top 5 Unsatisfactory Routes		Example of Verbatim Complaints (complete sorted verbatims in separate document)
FAU/VASHON	30%	<b>Seattle/Bainbridge</b> - Better traffic coordination with City of Seattle. We've been on the island nearly 40 years and the situation is getting worse, not better.
SEA/BAINBRIDGE	22%	<b>Seattle/Bainbridge</b> - Get back on schedule faster. If the boat is delayed leaving speed up so we arrive at the same time and the issue doesn't compound.
SEA/BREMERTON	21%	<b>Seattle/Bremerton</b> - Boats are probably late 50% of the time. Late announcements. No accountability: no reason given, no apology. Sometimes boats sit at the dock and NOTHING is happening, yet it leaves late.
MUK/CLINTON	12%	<b>Seattle/Bremerton</b> - Ferry delays are a very common occurrence, most often due to staffing issues or repairs needed on the vessels. Managing staffing and having appropriate back up plans will assist with on time departures from Bremerton.
ANA/SAN JAUN	8%	<b>Point Defiance/Tahlequah</b> - Figure out the problem of loading cars at the Fauntleroy ferry terminal. <b>Edmonds/Kingston</b> - The issue at the dock has gone on way too long. 1) Keep a police person on the site at all times, 2) allow those with permanent passes to by pass (go around) the ticket booth and be scanned on the other side quickly and efficiently. <b>Fauntleroy/Vashon</b> - better loading/unloading and ticket purchase procedures, better procedure in place for late or missing crew. <b>Fauntleroy/Vashon</b> - cancelled ferry due to not enough crew or not enough qualified crew. Really. What if your hospital operated like the ferry. Missing my flight because I can't depend on the ferry system to keep boats in good mechanical order and employees on time is wrong.

# Winter WSF Performance Using WSF Website

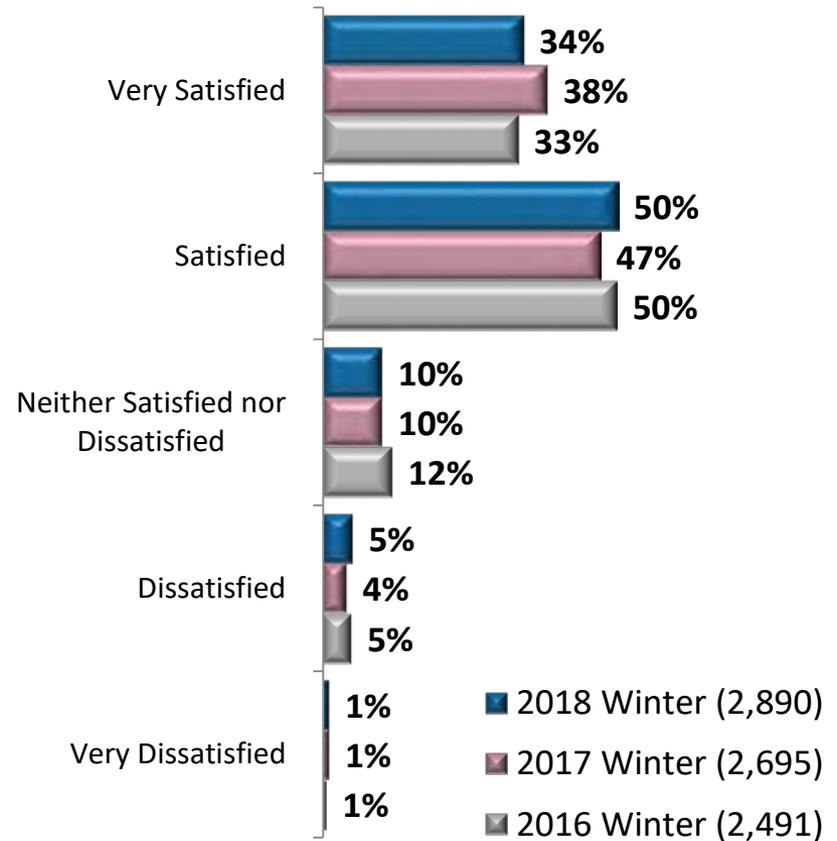


Three-fourths of riders (76%) have used the WSF website and most (84%) continue to say they are satisfied with their experience while 6% say they are dissatisfied.

**Used WSF Website**



**Experience Using Website**



Q90. During the Winter Schedule period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018), have you for any reason used the WSF website?

Q91. How satisfied were you with your experience using the WSF website?

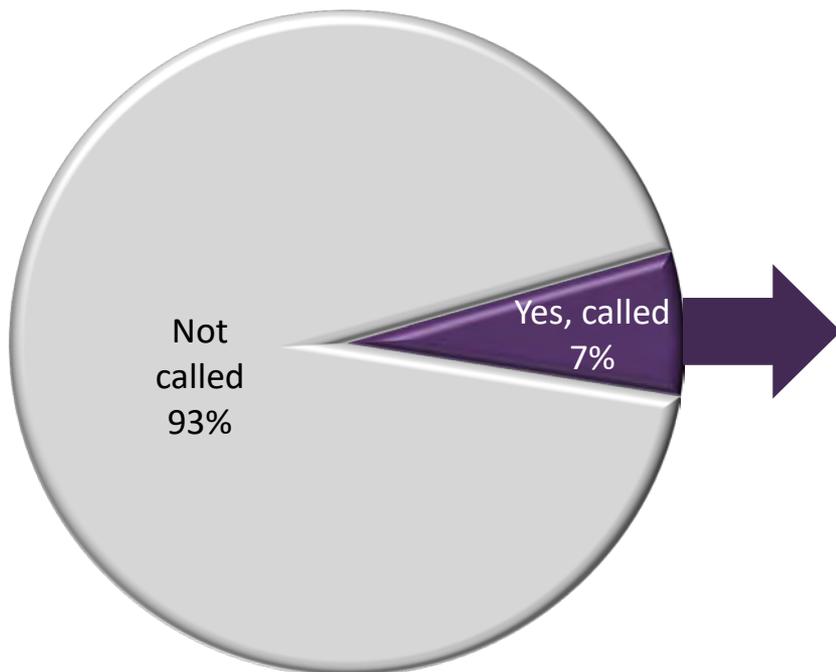
# Winter WSF Performance

## Calling WSF Customer Service by Phone

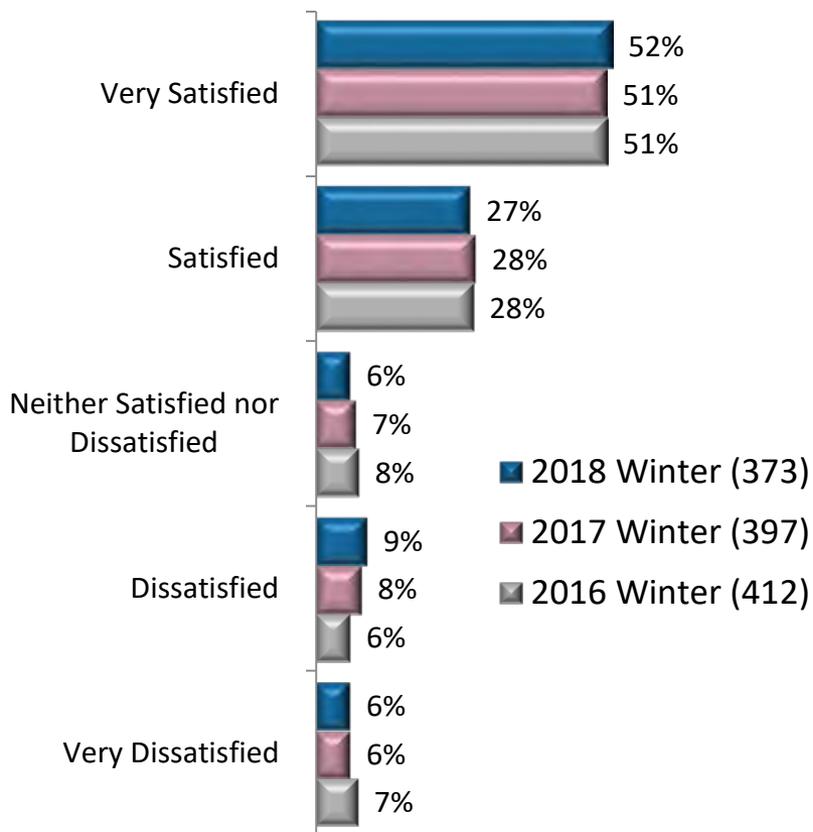


Only one-in-ten (7%) riders have contacted WSF customer service by phone and most (79%) are satisfied and 15% are dissatisfied with their experience.

**Called WSF Customer Service**



**Experience Calling WSF**



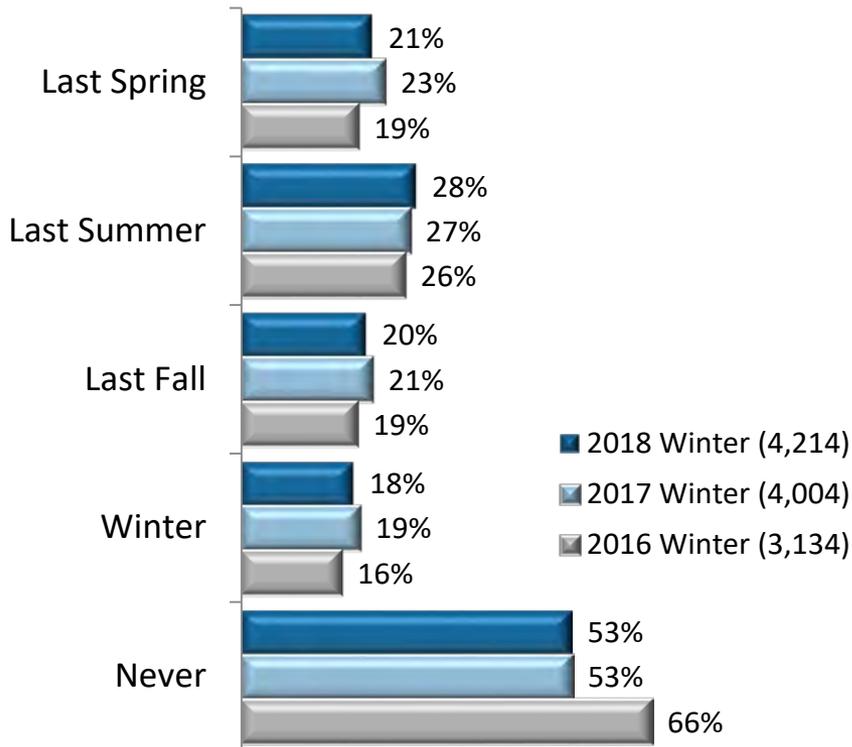
Q93. During the Winter Schedule period (January 7<sup>th</sup> through March 31<sup>st</sup> 2018), have you for any reason called WSF Customer Service by phone?  
 Q94. How satisfied were you with your experience calling the WSF by phone?

# Winter WSF Performance Using WSF Reservation System

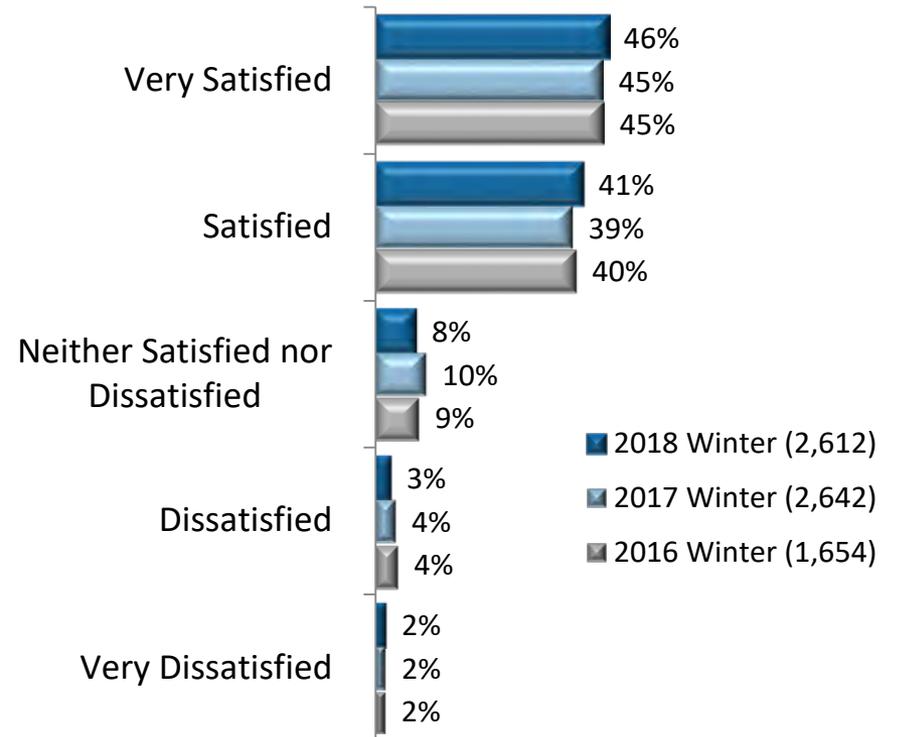


Among the 47% of riders who used WSF reservation system, the vast majority (87%) say that they are satisfied with their experience. Only 5% of those that use the system are dissatisfied with it.

**Used WSF Reservation System  
(Multiple Response)**



**Experience with the WSF reservation system**



Q113. Have you used WSF reservation system during ... (Circle all that apply)

Q114. How satisfied were you with your experience with WSF reservation system?



# Freight Company Decision Makers – Evaluation of WFS



### Contains Information Regarding:

- ❖ Fleet Profile
- ❖ WSF Usage & Routes Traveled
- ❖ Frequency of WSF Usage
- ❖ WSF Value Perception
- ❖ Impact of Fare versus Wait Times
- ❖ Scheduling Flexibility
- ❖ Wait-time Impact
- ❖ Reservation Usage and Satisfaction

### Information Gathered From The Following Surveys:

- ❖ Freight Shippers Survey (Executive Interviews)
  - ❖ A general usage and satisfaction survey conducted in May 2018 with freight shipping companies testing: WSF usage, value perception, congestion pricing, and reservation system opinions. A total of 100 executive level telephone interviews were conducted (between May 14 – June 1, 2018).

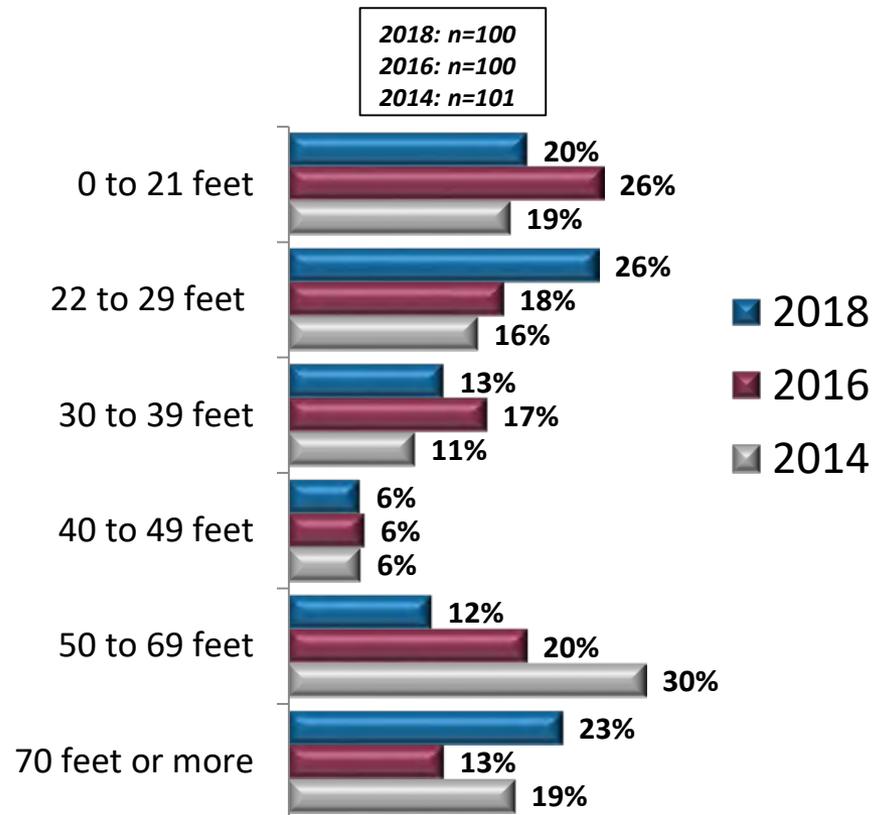
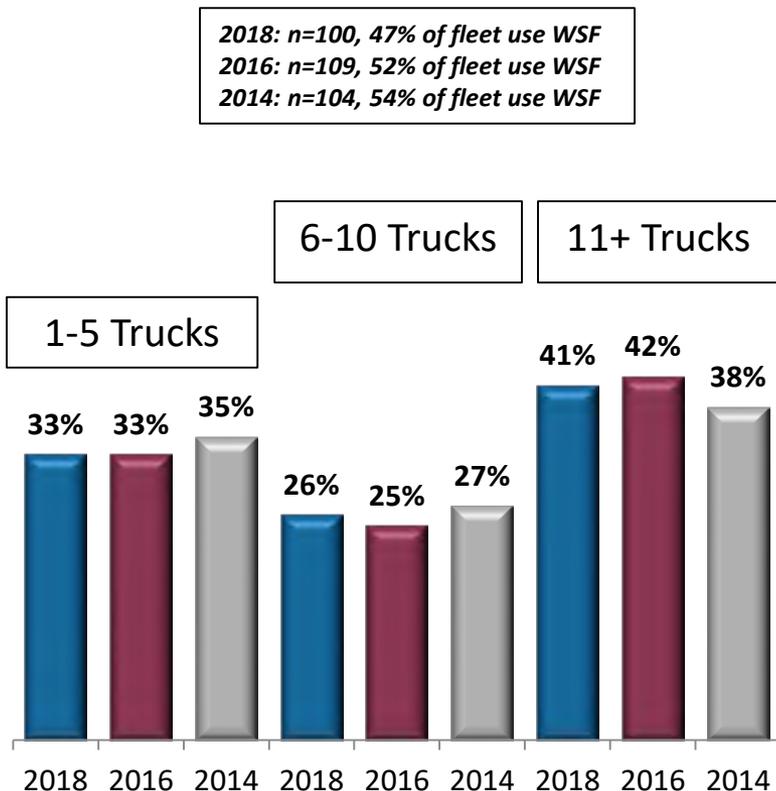
### Key Findings

- ❖ *Average freight trips per month, and seasonal truck crossings have remained similar from 2014 to 2018.*
- ❖ *More freight companies reported using the Anacortes/San Juan and Fauntleroy/Vashon routes to the decline of the Seattle/Bainbridge.*
- ❖ *Freight travel behavior has remained consistent from 2014/2016 to 2018.*
- ❖ *Perception of WSF as a good value remains the same between 2012/14/16 and 2018 at over eight out of ten.*
- ❖ *By a large margin, the time trucks have to wait has a much greater impact than the fares WSF charges for trucks on whether to use or not use WSF.*
- ❖ *The issue of wait times impacts about three out of four companies. Per boat wait times are also similar on all the routes between 2016 and 2018.*
- ❖ *Overall satisfaction with reservations has decreased, but the total number of companies using the system has also increased.*

# Freight Company Fleet Profile – Comparison



Fleet sizes and make up for the freight companies interviewed in the 2018 survey are similar to the 2016 and 2014 survey. The percent of freight companies' fleets using WSF has also remained constant at about 50% since 2014.



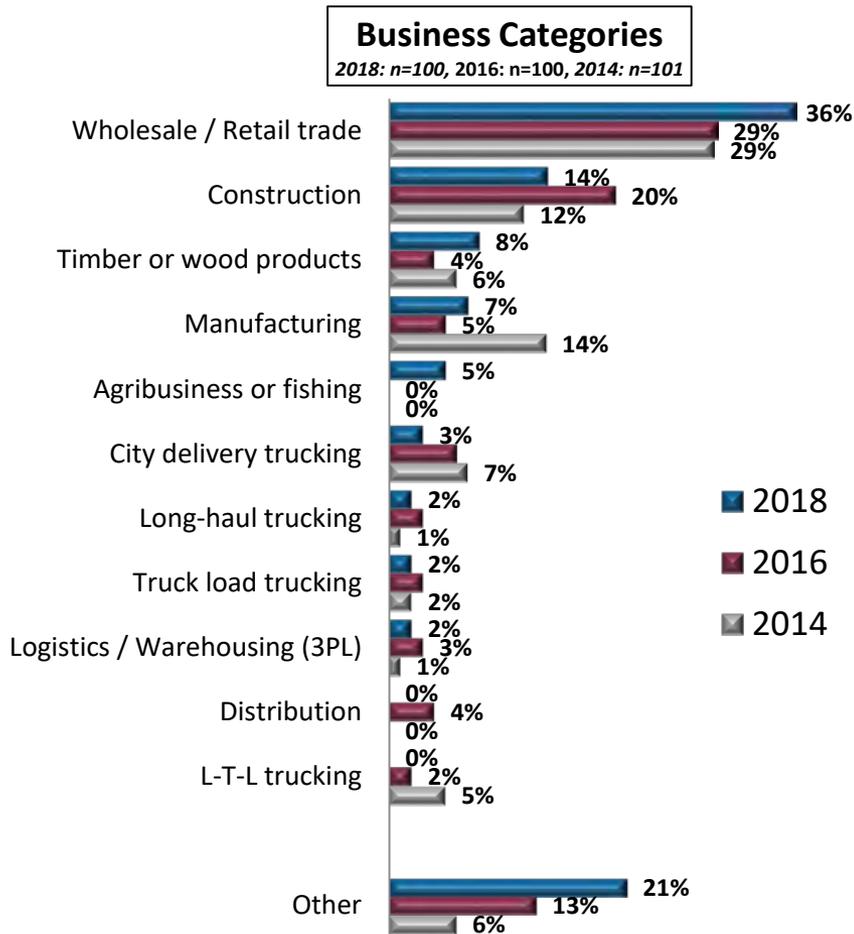
Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

Q7a-f. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

# Freight Company Fleet Profile – Comparison



Wholesale / Retail trade is up from 29% in 2014 and 2016 to a over a third in 2018 (36%). Many of these differences in these tables are a function of the limited sample size of the study not market changes.



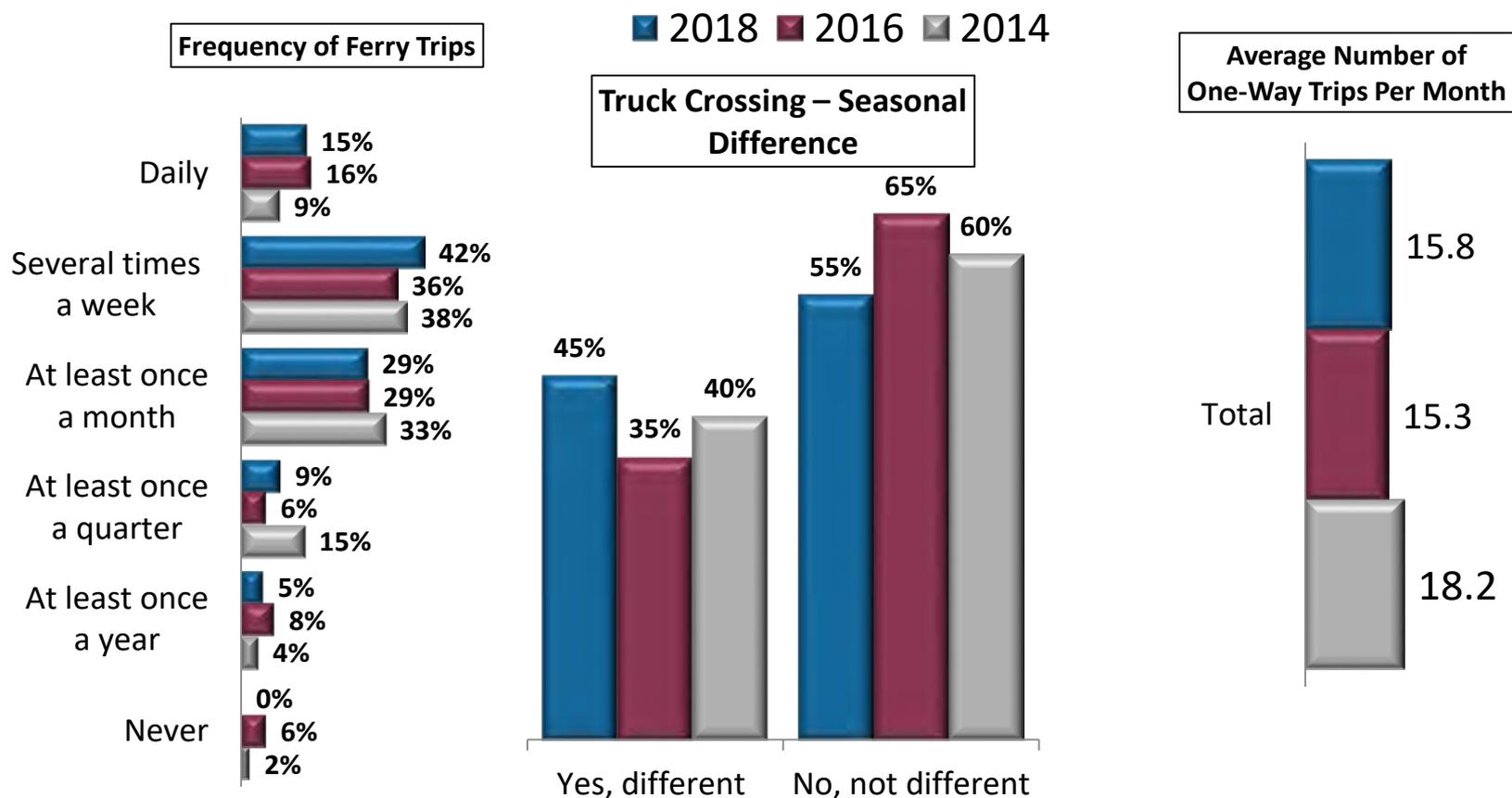
Location Delivered to (by types)	Total (Multiple Mentions)			Most Freight		
	2018	2016	2014	2018	2016	2014
Retail or commercial businesses	78%	53%	56%	48%	27%	19%
Residential locations	45%	33%	40%	19%	27%	30%
Construction sites	46%	28%	30%	17%	23%	41%
Warehouses	27%	26%	8%	3%	10%	--
School / Educational locations	26%	2%	3%	1%	--	--
Military Locations	16%	--	--	2%	--	--
Some other type of place or location	13%	10%	6%	9%	3%	4%

Q11. Which of the following categories best describes your company’s line of business? Q12. Using the ferries, which location type do you deliver freight to? [MULTI RESPONSE] Q13. And, which location type do you deliver the most freight to?

# Freight Company Ferry Usage – Comparison



Frequency of ferry trips over the year, average number of one-way trips per month, and seasonal truck crossings are all similar in 2018 to 2016/2014 given study sample size.



Q4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?

Q5. Is the average number of ferry crossings made by your trucks different October through March than April through September?

Q6/Q7/Q8. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March, April through September, and in a typical month? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

# Freight Company Routes Traveled – Comparison



*More of the companies in 2018 reported using most often the Anacortes/San Juan and Fauntleroy/Vashon routes than in 2016 to the decline of the Seattle/Bainbridge route.*

Route	Total Use		Most Often Used	
	2018	2016	2018	2016
Anacortes/San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	42%	33%	24%	10%
Edmonds/Kingston	36%	41%	25%	19%
Mukilteo/Clinton	35%	33%	18%	23%
Fauntleroy/Vashon	23%	15%	11%	2%
Seattle/Bainbridge	19%	28%	8%	15%
Coupeville/Port Townsend	17%	15%	5%	2%
Seattle/Bremerton	14%	12%	1%	4%
Point Defiance/Tahlequah	9%	8%	4%	2%
Vashon/Southworth	6%	10%	2%	2%
Fauntleroy/Southworth	4%	7%	--	--
Interisland San Juan Includes Shaw, Orcas, Lopez, and Friday Harbor	4%	7%	1%	--
Anacortes/Sidney	--	6%	--	--
Routes used equally	4%	--	5%	19%
Don't know/Refused	--	5%	--	2%

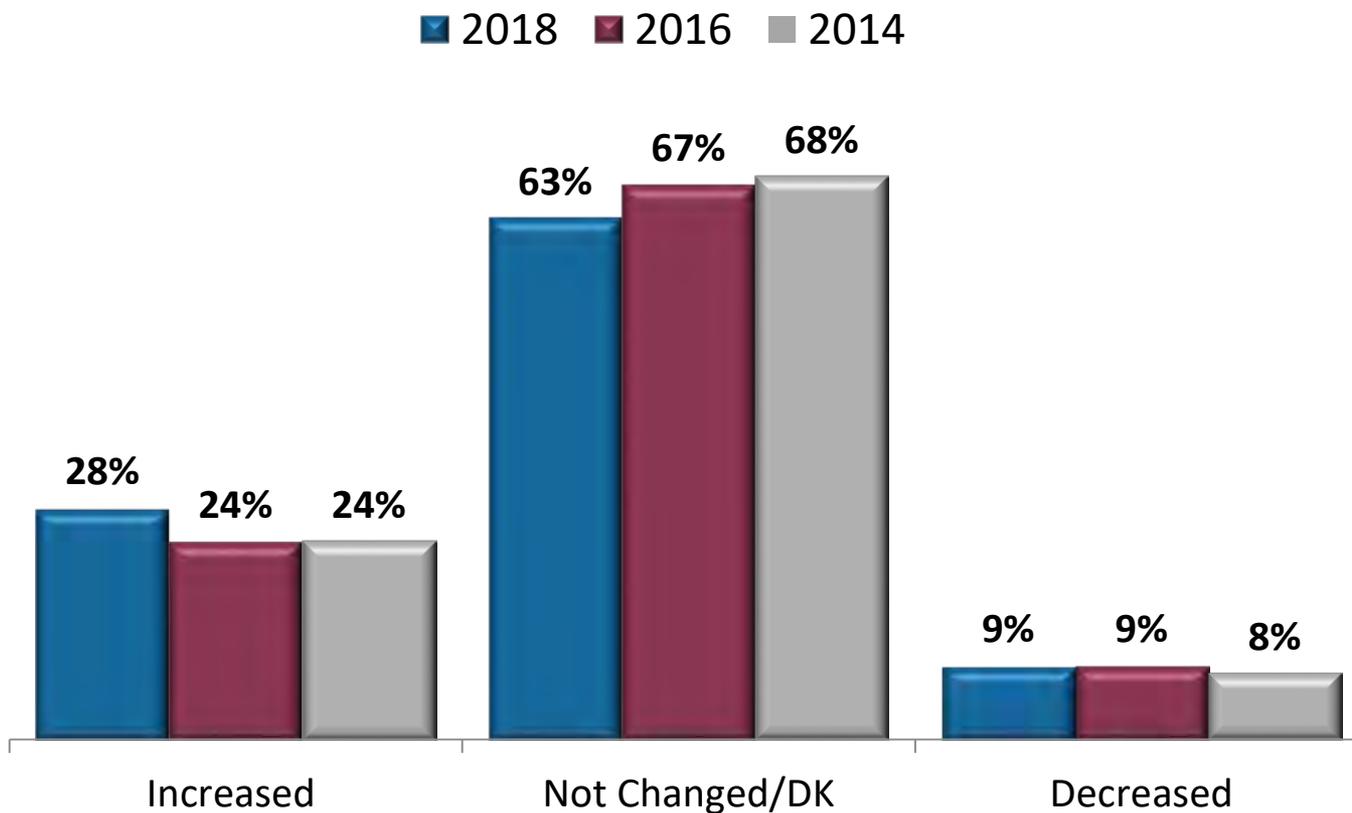
Q9. What ferry routes do you use for moving freight? [MULTI RESPONSE] [IF MORE THAN ONE ROUTE MENTIONED IN Q9 ASK FOLLOW-UP Q10]

Q10. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q9]

# Freight Company Travel Behavior – Comparison



*Travel behavior has remained consistent from 2014/2016 to 2018.*



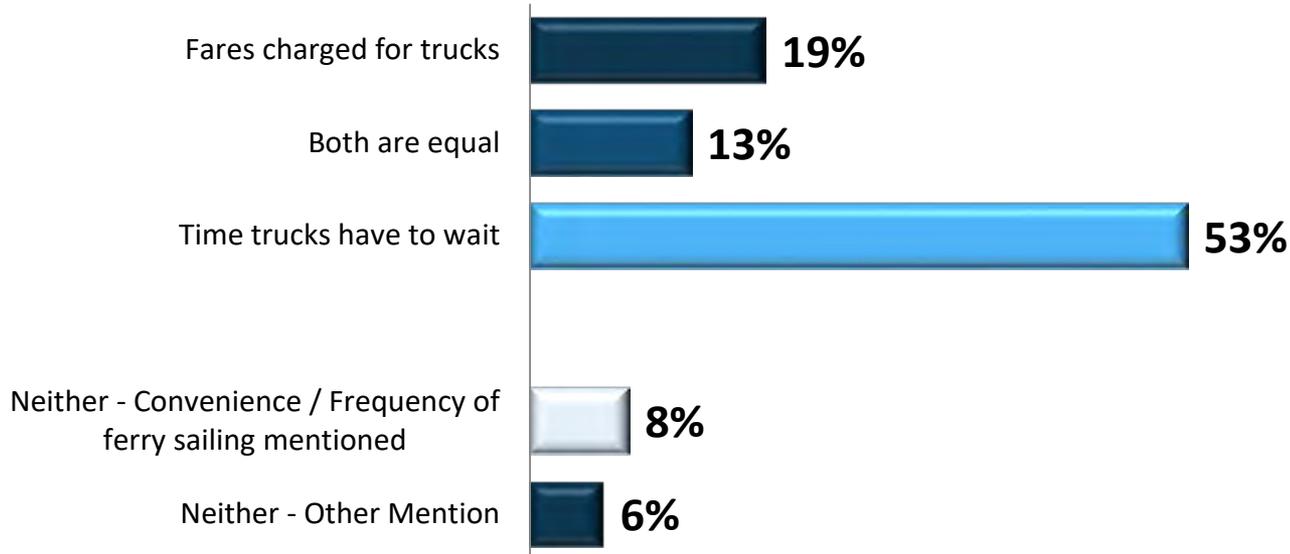
Q39. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?  
Q39b. What is the primary reason for the decrease?



*By a large margin, the time trucks have to wait (53%) has a much greater impact than the fares WSF charges for trucks (19%) on whether to use or not use WSF.*

### Fares vs. Waiting Time Impact on WSF Usage

(n=98)



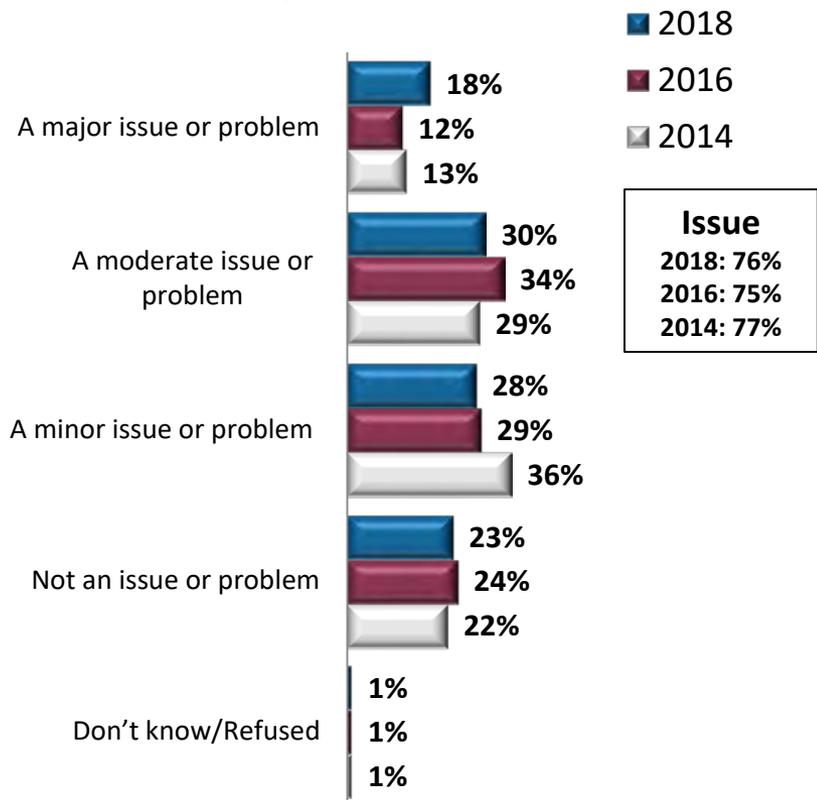
Q17. Which of the following has a greater impact on your decision to use or not use Washington State Ferries? The fares charged for your trucks or the time your trucks have to wait at the terminal?

# Freight Company Wait Times – Comparison



Similar to 2014/16, the issue of wait times impacts about three out of four companies in 2018. Per boat wait times are also similar on all the routes between 2016 and 2018.

## Impact of Wait Times



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2018 n=71	2016 n=75	2018	2016
Anacortes/San Juans	28%	19%	1.6 [n=17]	1.9 [n=12]
Edmonds/Kingston	20%	16%	1.4 [n=11]	1.1 [n=10]
Mukilteo/Canton	14%	13%	1.2 [n=8]	1.6 [n=9]
Fauntleroy/Vashon	10%	1%	1.4 [n=5]	1.0 [n=1]
Seattle/Bainbridge	8%	11%	1.3 [n=6]	1.0 [n=6]
Coupeville/Port Townsend	7%	4%	1.5 [n=4]	1.0 [n=3]
Point Defiance/Tahlequah	7%	--	1.2 [n=5]	--
Interisland San Juan	3%	3%	2.0 [n=2]	1.0 [n=2]
Seattle/Bremerton	1%	1%	1.0 [n=1]	1.0 [n=1]
Vashon/Southworth	1%	1%	1.0 [n=1]	--
All routes	--	3%	--	--
Don't know	5%	--	--	--

Q22. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers?

Q23. On what route or routes do your drivers experience excessively long wait times? [MULTI RESPONSE]

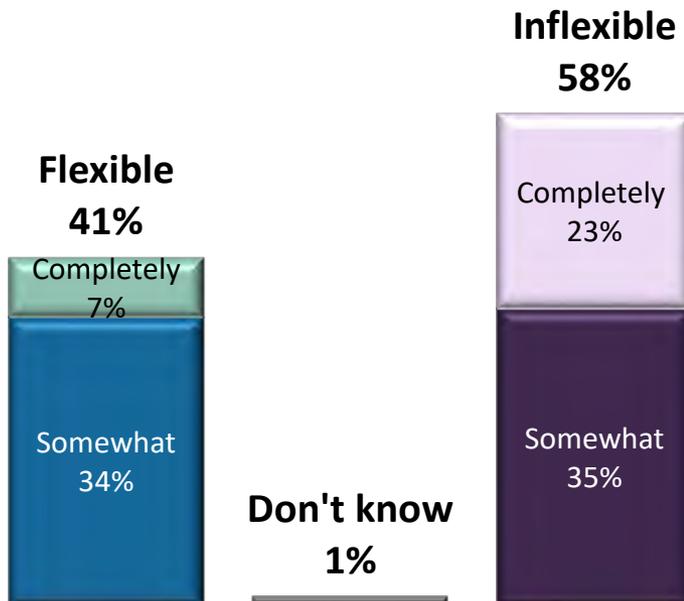
Q24. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

# Freight Company Scheduling Flexibility

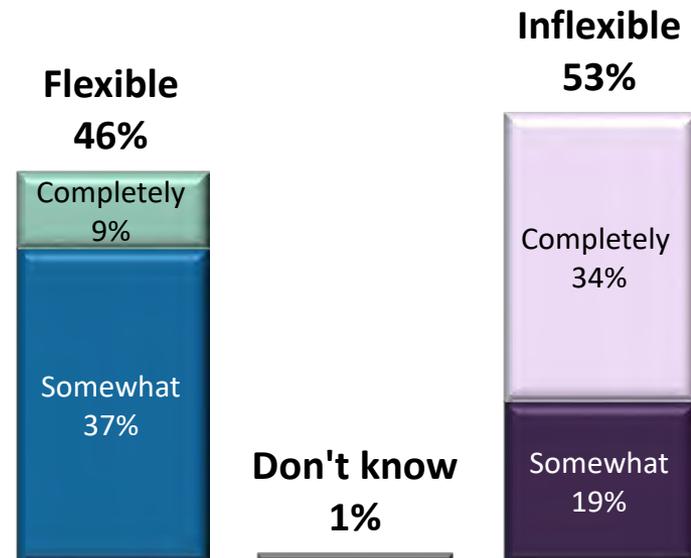


Almost four in ten (41%) have flexibility when selecting the ferry travel time to go, and almost half (46%) have flexibility when selecting which ferry travel day to use. However, there is a quarter to a third that are completely inflexible on time or day of week to use.

## Time of Day - 2018



## Day of Week - 2018



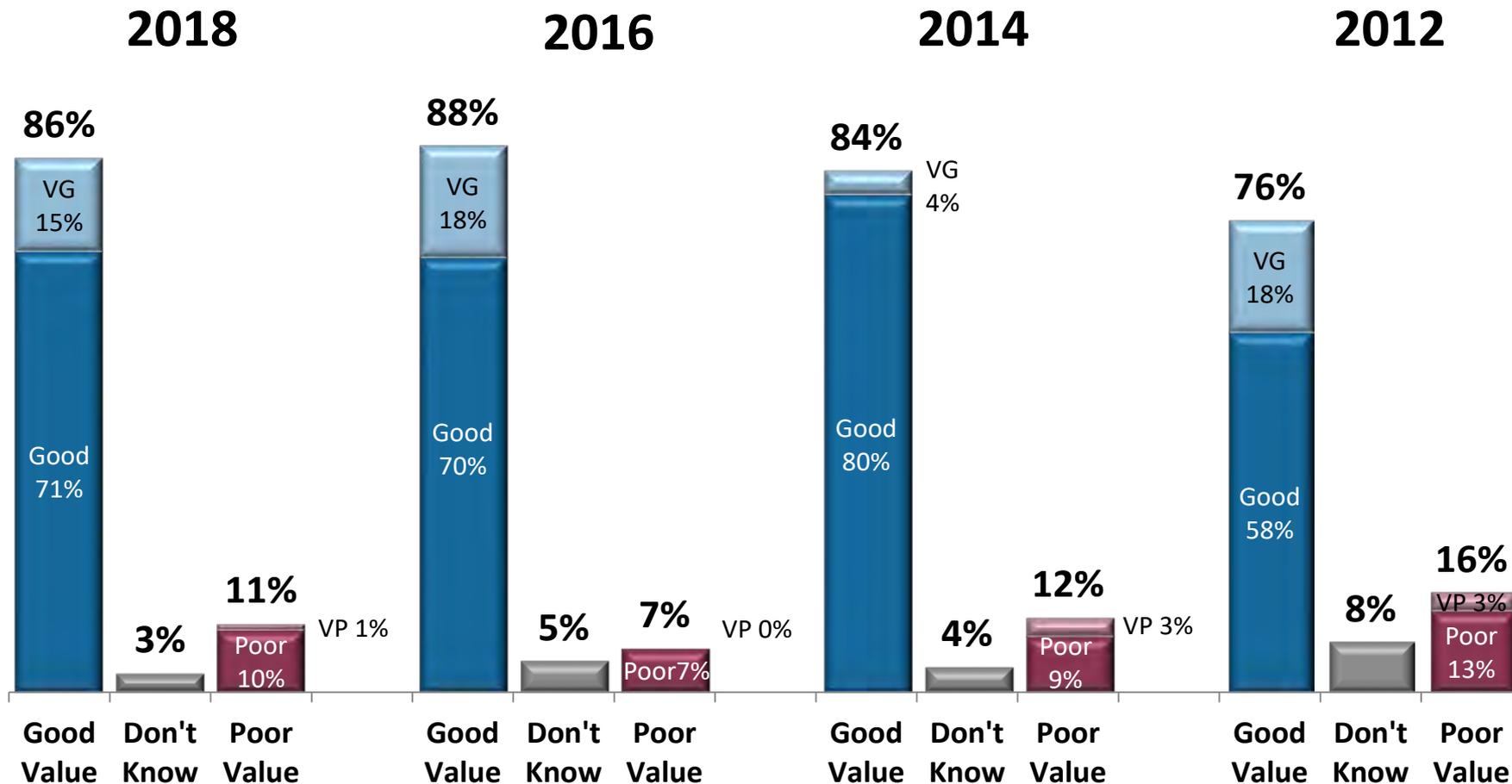
Q18. What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your drivers? Would you say you are... ?

Q19. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?

# Freight Company Value Perception – Comparison



Overall, the perception of WSF as a good value remains the same between 2012/14/16 and 2018 at over eight out of ten (76% to 86%).

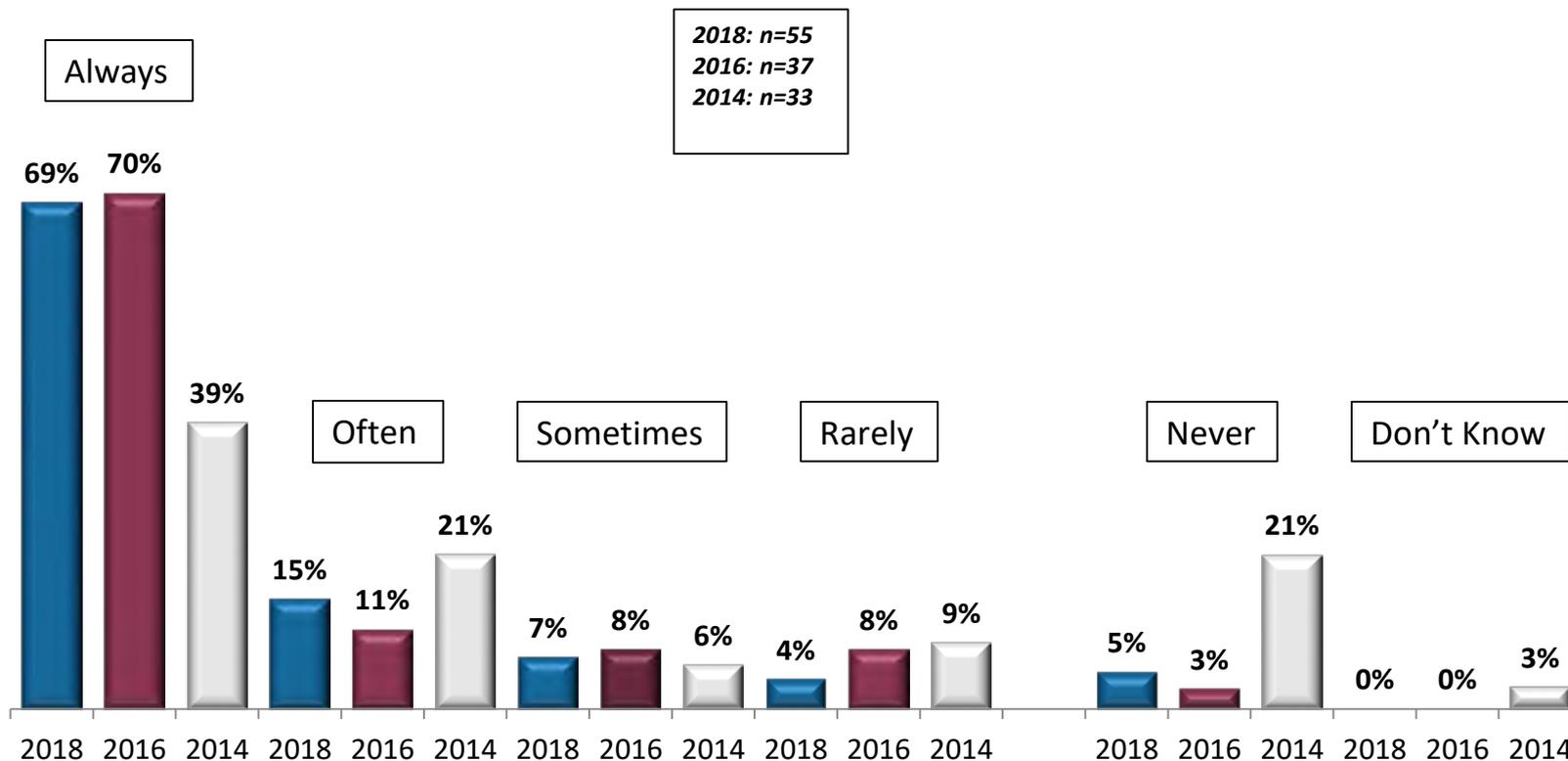


Q40. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

# Freight Company Reservations – Usage Comparison



*The Coupeville/Port Townsend and Anacortes reservation system usage has remained constant between 2018 and 2016 but has increased dramatically from 2014.*



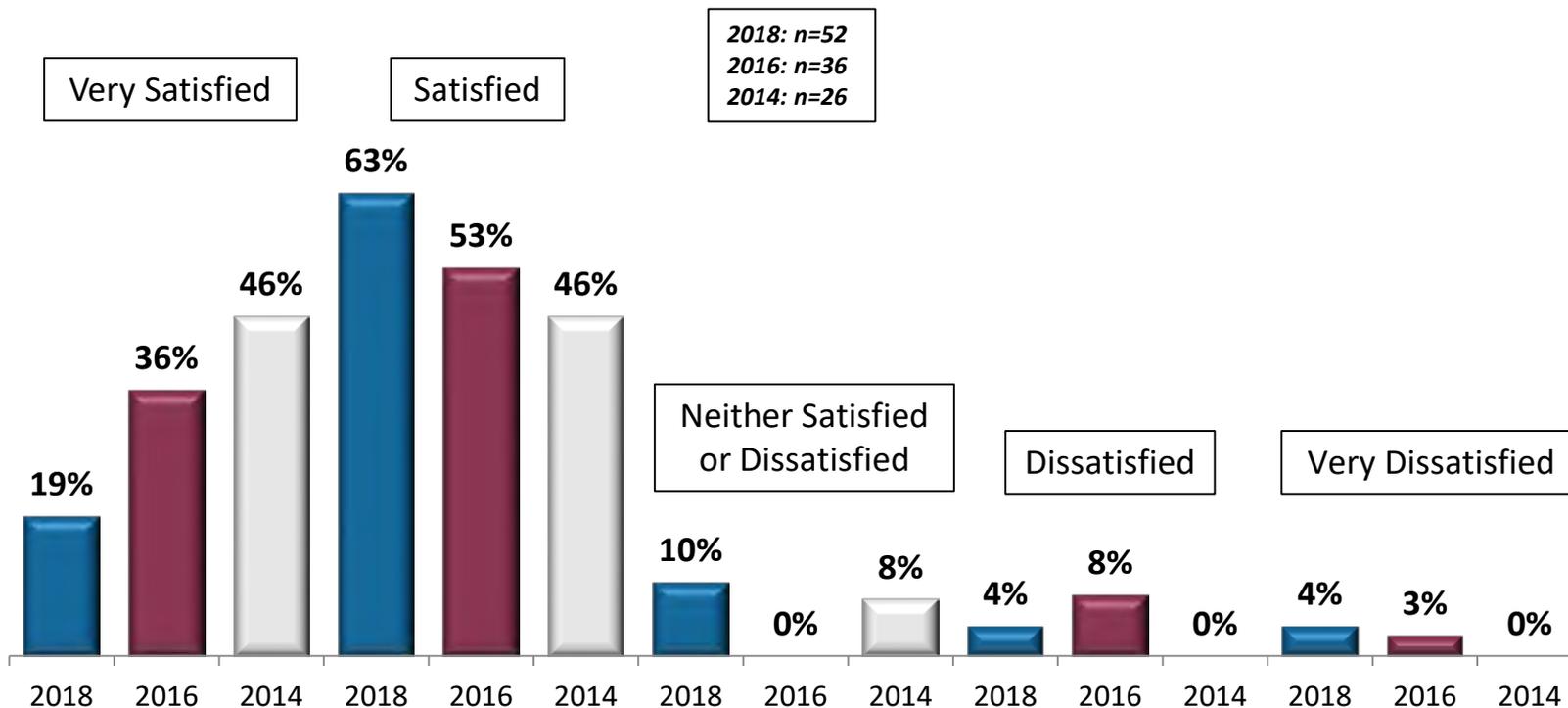
*\*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.*

Q27. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's vehicle reservation system? Would you say... ?

# Freight Company Reservations – Satisfaction Comparison



Overall satisfaction in 2018 (82%) has decreased from 2016 (89%) and 2014 (92%), but the total number of companies using the system has also increased.



\*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.

Q28. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?



# General Public – Attitudes Towards WSF by Statewide and Puget Sound Basin Citizens



### Contains Information Regarding:

- ❖ Statewide Citizens Ridership of WSF
- ❖ WSF Travel Frequency & Routes Used
- ❖ WSF Travel Purpose
- ❖ WSF Travel Behavior Changes & Reasons
- ❖ Importance of WSF to Puget Sound Economy
- ❖ Importance of WSF to Tourism
- ❖ Operations Funding
- ❖ Fare Box Recovery

### Information Gathered From The Following Surveys:

- ❖ General Public Survey (VOWS panel)
  - ❖ The Voice Of Washington State (VOWS) panel was an online community developed by the WSTC where any Washington resident had an opportunity to weigh in on statewide and regional transportation issues. VOWS funding was discontinued by the legislature in 2017 and last use by the WSTC for the 2018 General Public Survey.
  - ❖ A study of the general public conducted in June 2018. A total of 5,419 completed surveys were collected via the VOWS statewide survey panel between June 1 and June 20, 2018.

### Key Findings

- ❖ *Approximately 9 in 10 state residents have ridden WSF at some point in their lives.*
- ❖ *Residents living on the westside of the Puget Sound basin have a higher WSF travel frequency than those living on the eastside Puget Sound basin or in Non-Puget Sound areas.*
- ❖ *Non-Puget Sound basin residents and Puget Sound basin Eastside counterparts use the ferries more for tourism/recreation/to see friends than westside residents.*
- ❖ *About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth and Puget Sound tourism.*
- ❖ *Statewide, about seven in ten say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 63.3%.*
- ❖ *Citizens feel a farebox recovery of 2/3 to 3/4 is appropriate to cover annual operation costs.*
- ❖ *Over 40% of Non-Puget Sound residents feel riders should pay more than 75% of the daily operating costs.*



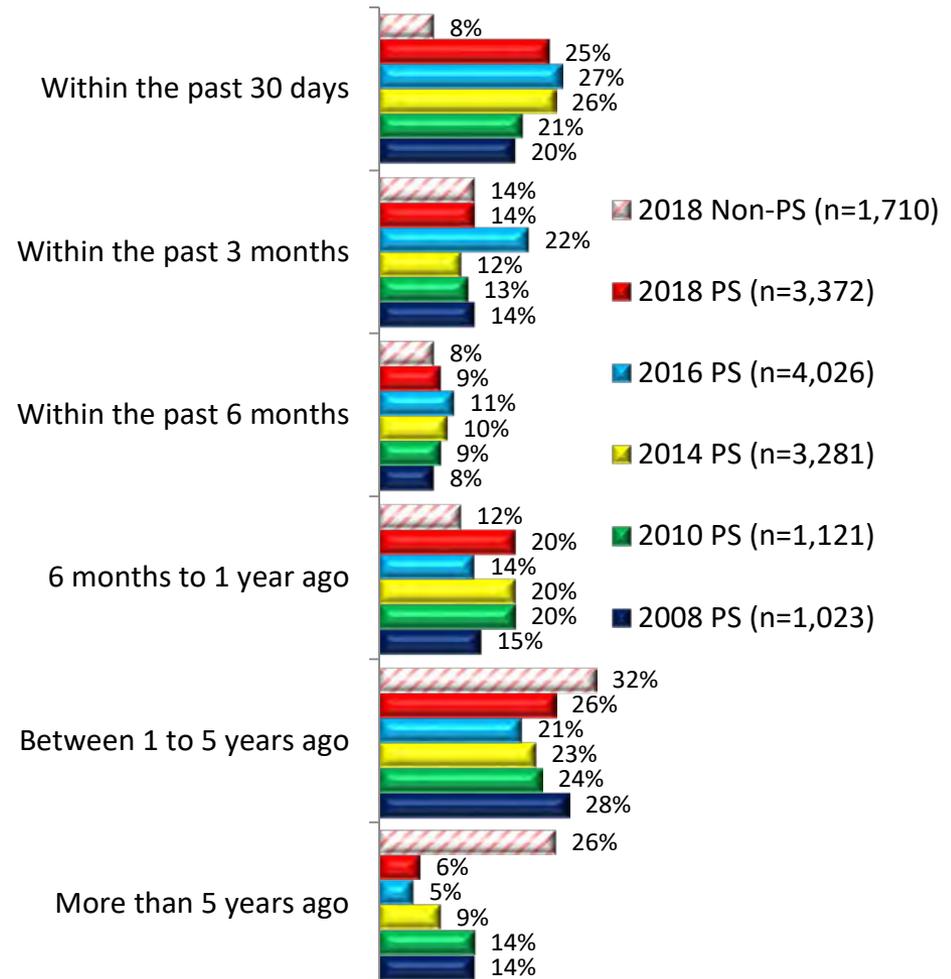
Approximately 9 in 10 state residents (96%) in 2018 have ridden a WSF at some point in their lives.

- ❖ Puget Sound (PS) basin residents “ever” ridership in 2018 is 98% compared to non-Puget Sound (Non-PS) basin of 92%
- ❖ Timing of the last trip has been consistent since 2008 in the Puget Sound basin where two out of three have used WSF in the last 12 months.

### Ferry Ridership (2008-2018)



### Last trip on WSF (2008-2018)



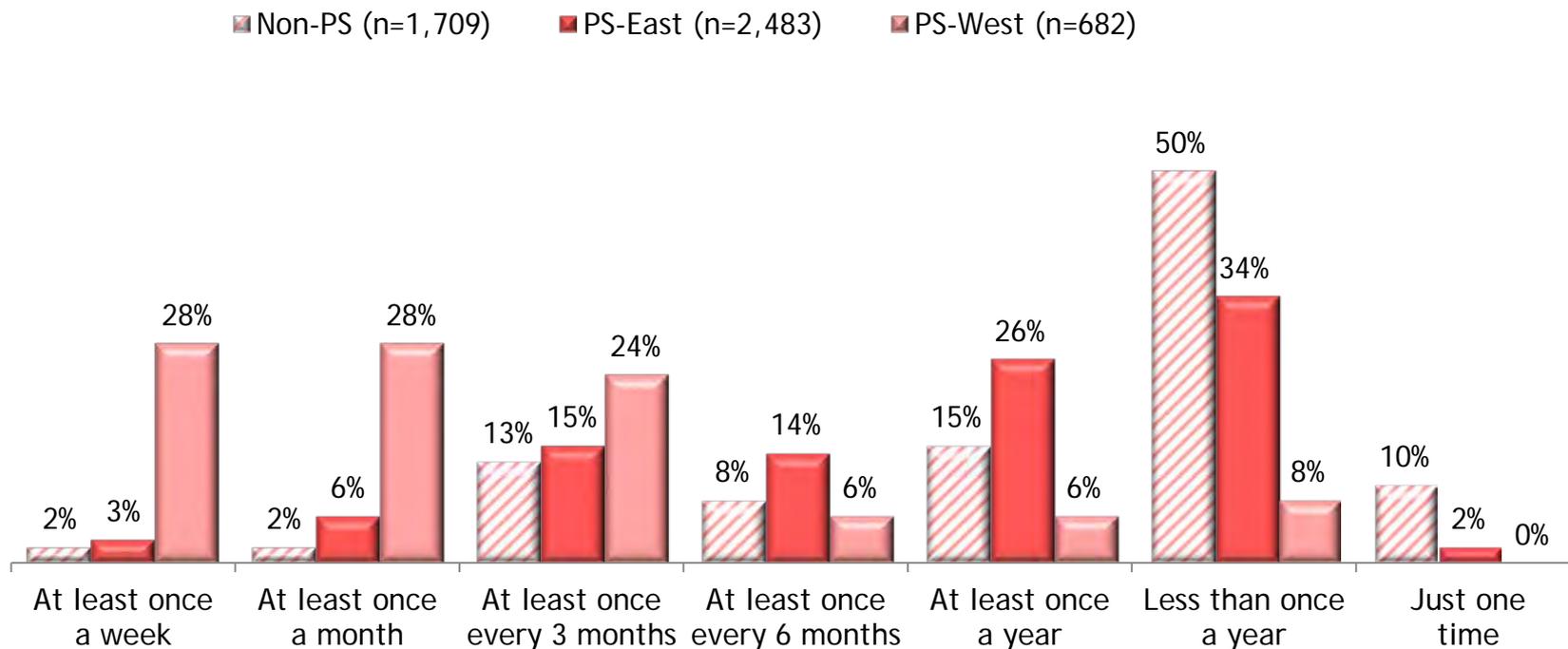
# General Public

## Travel Frequency – 2018 Overall



Residents living in Westside communities in the Puget Sound basin have a higher travel frequency on WSF than residents living in Eastside Puget Sound basin communities or in Non-Puget Sound areas.

### Travel Frequency (2018)



Q8 Approximately how often do you ride Washington State Ferries?

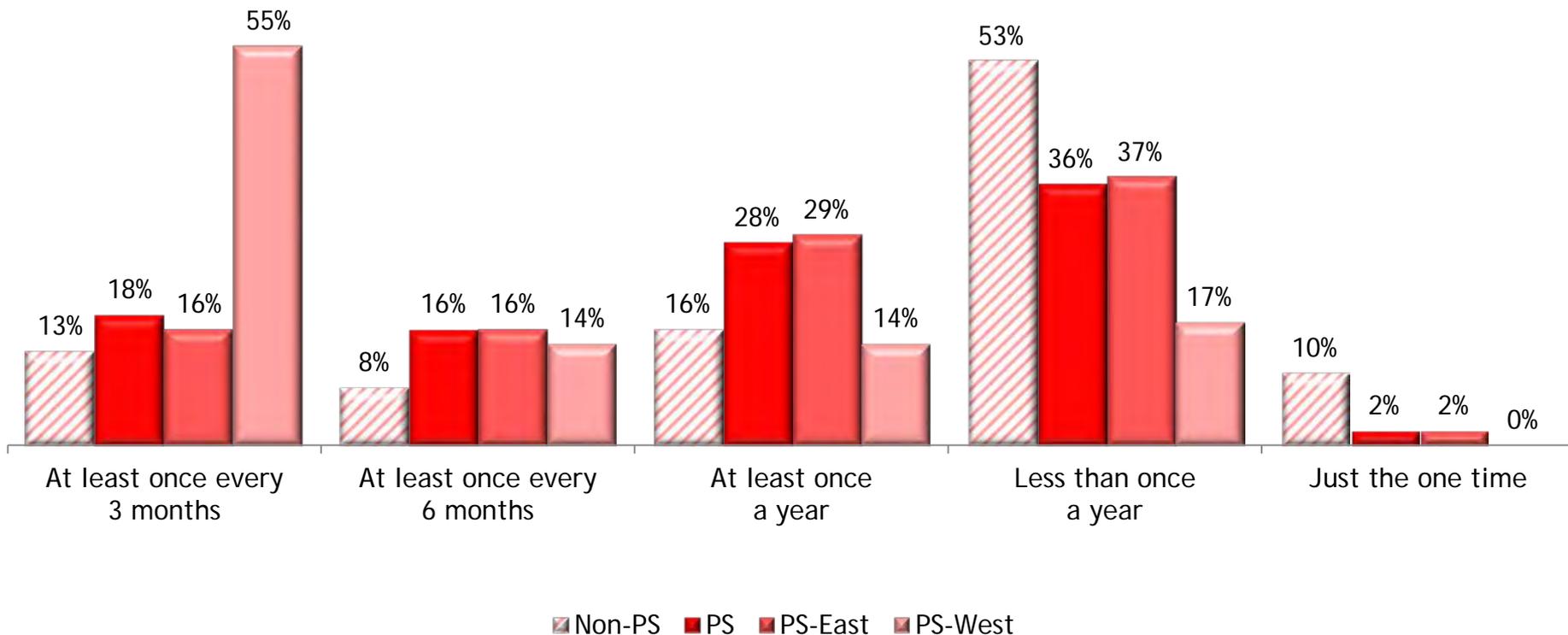
# General Public

## Travel Frequency – Infrequent Rider



When looking at infrequent travelers (riders that travel less than once a month) the WSF travel frequency varies greatly by location. Half (53%) of non-Puget Sound residents use WSF less than once a year vs. Puget Sound Westside residents where half (55%) use WSF at least once every 3 months.

### Travel Frequency by Infrequent Riders (2018)

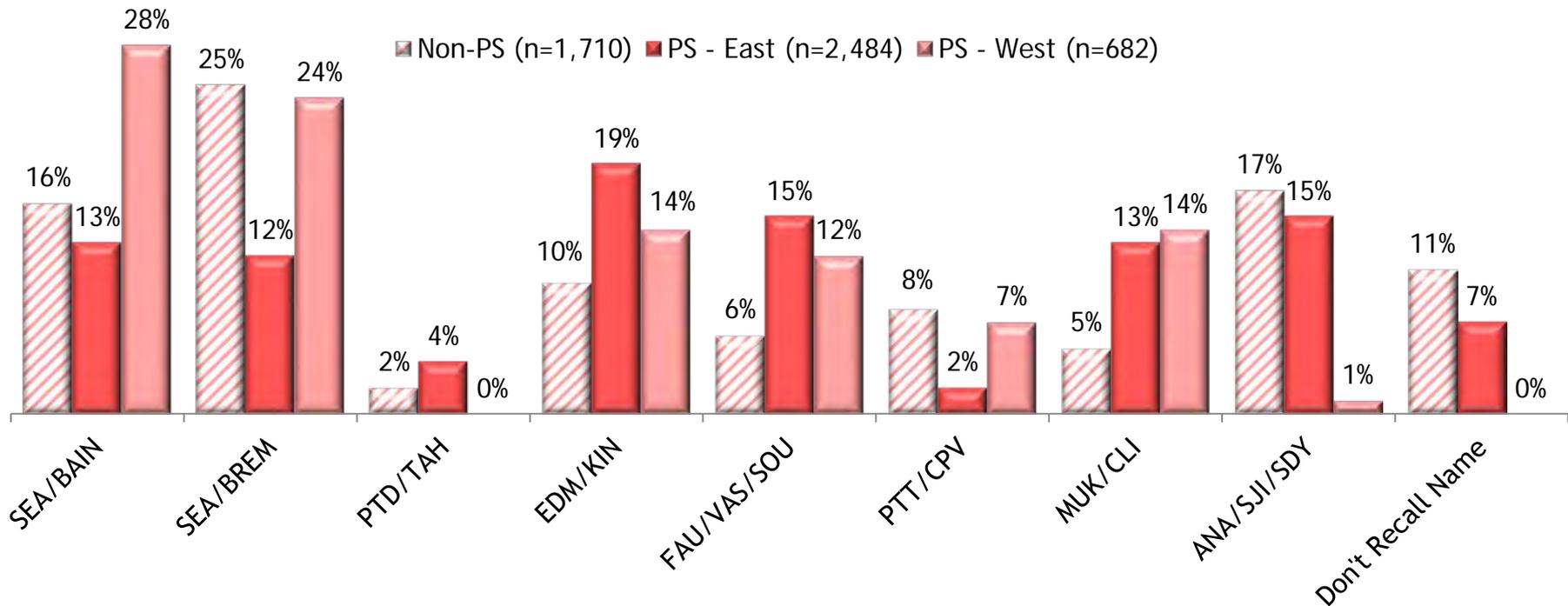


Q8 Approximately how often do you ride Washington State Ferries?



Residents in Westside Puget Sound basin communities tend to use Bainbridge (28%) and Bremerton (24%) more than their Eastside PS counterparts (13%, 12% respectively). Non-Puget Sound basin residents use Anacortes (17%) more often than their Westside Puget Sound counterparts (1% Westside).

### Last Route Traveled (2018)



Q4 What was the last Washington State Ferry route that you took?

# General Public

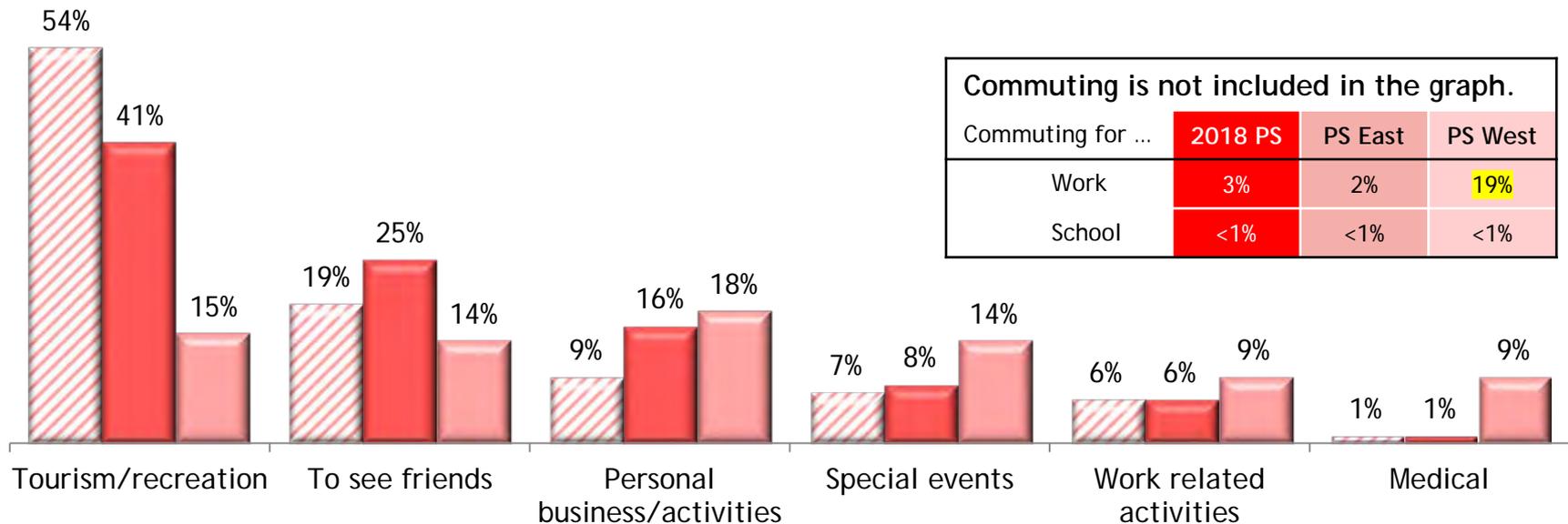
## Last Trip Purposes - 2018



*Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 41%) and to see friends (19%, 25%) than their Westside counterparts (15%, 14% respectively). Those living on the Westside use the ferries for work (19%) and medical (9%) more so than Puget Sound Eastside (2%, 1%) residents.*

### Most Frequently Mentioned Trip Purpose (2018)

■ 2018 Non-PS (n=1,709) 
 ■ 2018 PS-East (n=2,483) 
 ■ 2018 PS-West (n=682)



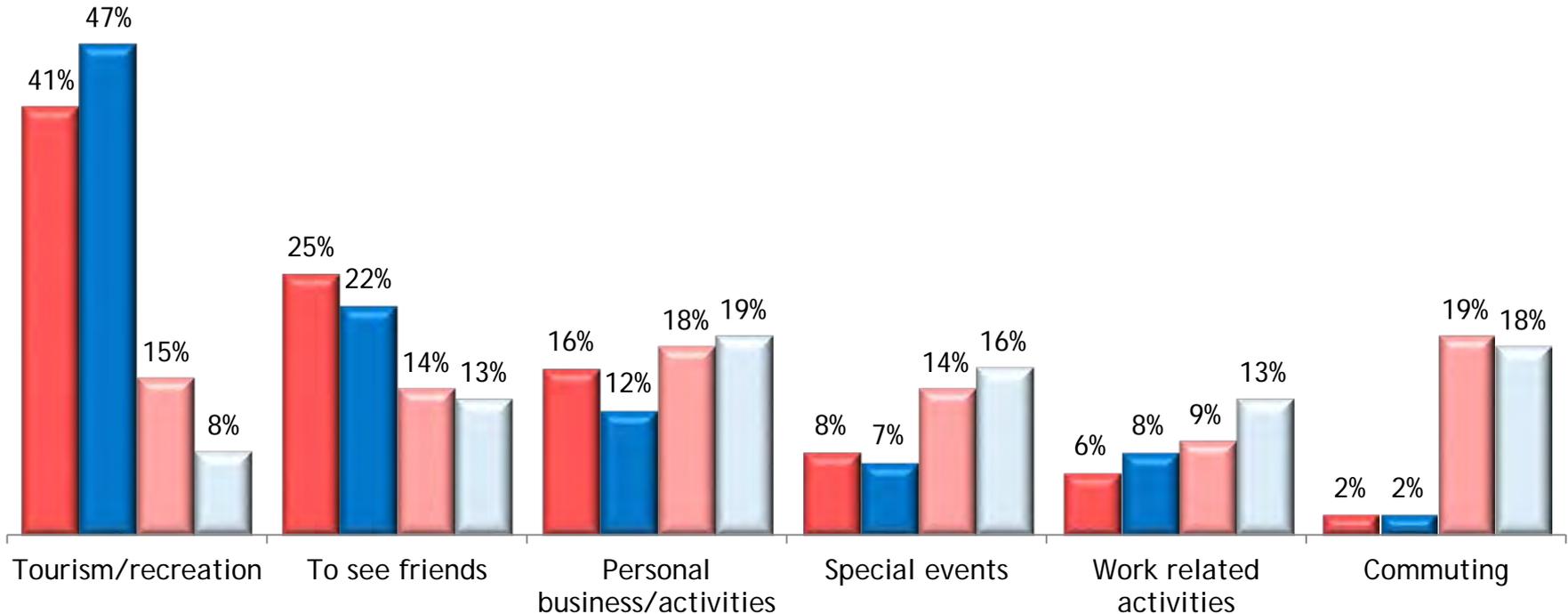
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?



*Puget Sound Eastside residents use ferries less for recreational purposes in 2018 (41%) than 2016 (47%). Puget Sound Westside residents use ferries more for recreational purposes in 2018 (15%) than 2016 (8%).*

### Most Frequently Mentioned Trip Purpose East/West (2016-2018)

■ 2018 PS-East (n=2,483) ■ 2016 PS-East (n=3,019) ■ 2018 PS-West (n=682) ■ 2016 PS-West (n=801)



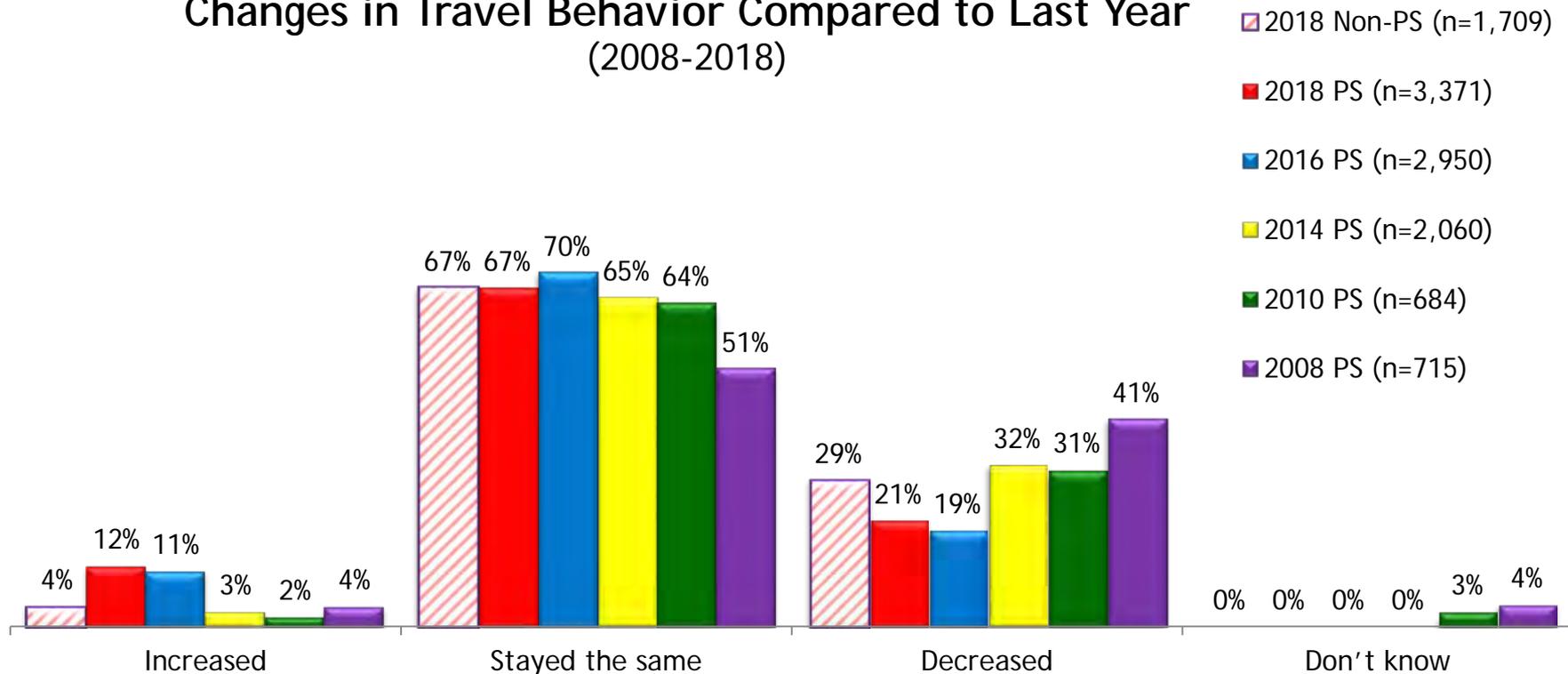
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

# General Public Travel Behavior Changes



*The change in travel behavior has remained constant between 2016 and 2018 with one in ten increasing usage, two in ten decreasing usage and three in ten staying the same in the Puget Sound basin. About one in three (29%) 2018 Non-Puget Sound basin riders say their WSF travel behavior has decreased over last year compared to 33% in 2016.*

## Changes in Travel Behavior Compared to Last Year (2008-2018)

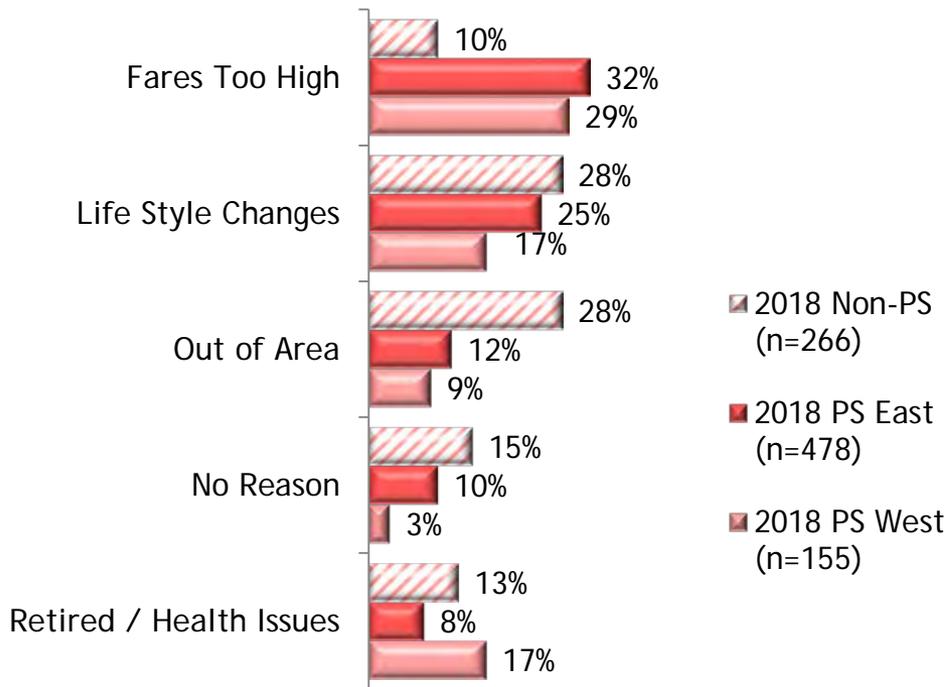


Q10 Over the past year, would you say the frequency with which you ride Washington State Ferries has... [READ LIST]



Among the 21% (n=1,477) statewide who say they have decreased or stopped their ridership of WSF, the three most frequently mentioned reasons for riding less frequently or stopping are: “out of the area” (21%), “change in life style” (20%), and “ferry fares are too high” (19%).

### Main Reasons for Riding Less: (but not stopping totally)



❖ Among the 9% (n=545) statewide who have stopped riding completely, the main reasons for doing so are:

- 31% Out of area
- 29% No Reason / No need
- 15% Life style changes
- 12% Fares too high

❖ Among the 9% (n=403) statewide who have increased their ridership of WSF, the main reasons for doing so are:

- 63% Recreational outings
- 51% Life style changes
- 41% Work / School changes
- 9% Retirement

Q11 What is the primary reason you are riding Washington State Ferries less often?

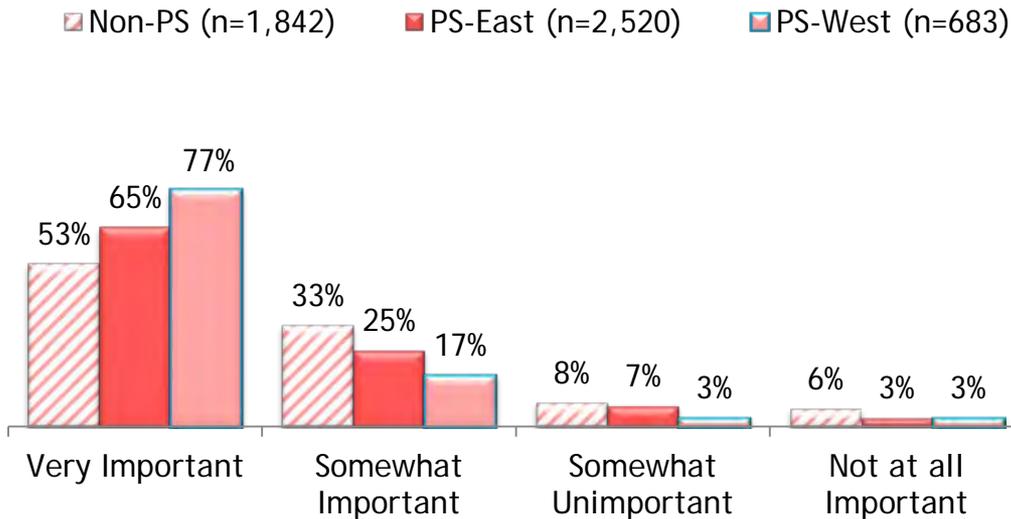
Q12 What is the primary reason you have stopped riding Washington State Ferries completely?

Q13 What would you say are the primary reasons that you are riding WSF more often?

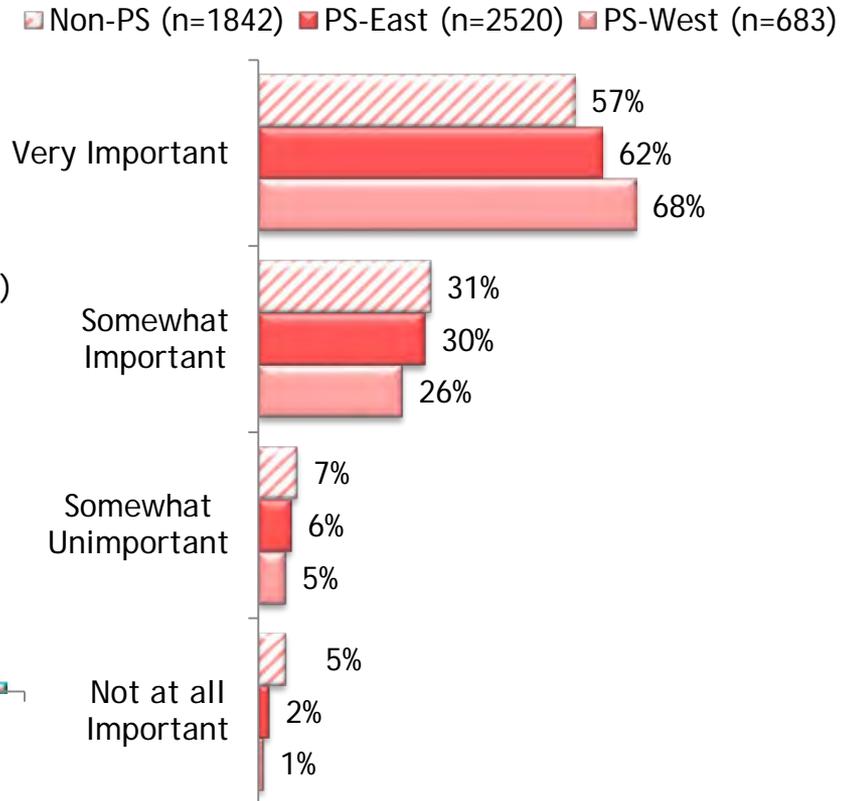


About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (89%) and PS tourism (90%). The perceived economic importance of WSF is only 4 percentage points higher in PS-East (90%) than Non-PS (86%).

### Importance of WSF to Economy and Growth of the PS Basin (2018)



### Importance of WSF to Encouraging Tourism in PS Basin (2018)



- Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...
- Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

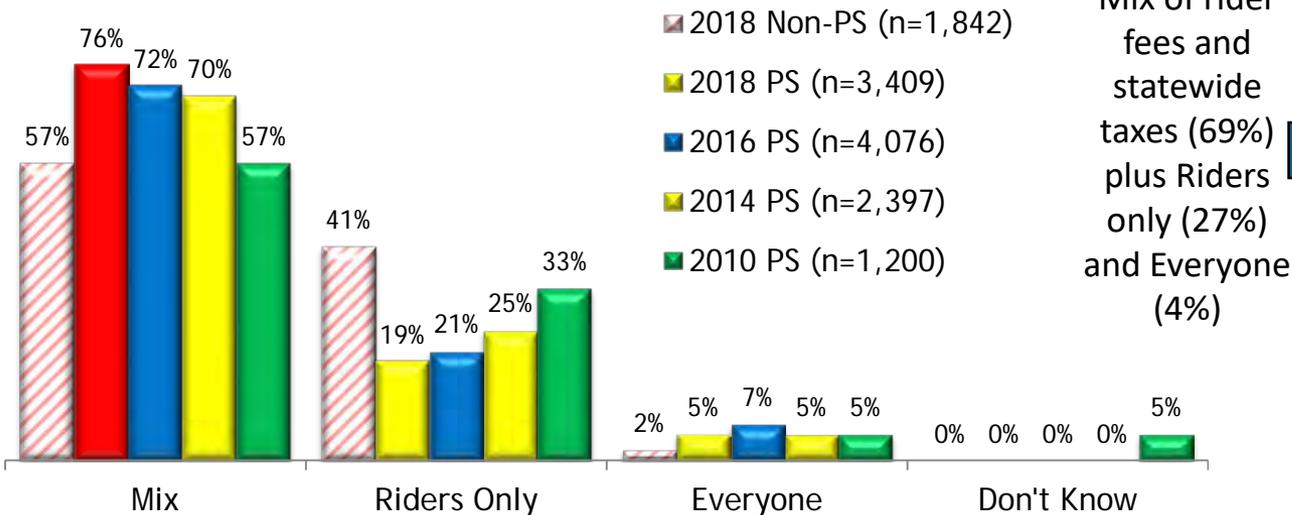
# General Public

## Funding for Daily Operations – 2010-2018



*Slightly more PS riders in 2018 (76%) than in 2016/14 (72%/70%) feel that daily operations should be paid for by a mix of rider fares and gas taxes. Non-PS residents in 2018 as in 2016 are more likely (41% in 2018, 39% in 2016) to say “riders only” should pay the daily operation costs than their Puget Sound counterparts (19% in 2018, 21% in 2016). Statewide, about seven in ten (69%) say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 63.3%.*

### How WSF Daily Operations Should Be Funded (2010 - 2018)



**Statewide**  
 Mix of rider fees and statewide taxes (69%) plus Riders only (27%) and Everyone (4%)

In 2018 citizens statewide suggested ferry riders should pay on average 63.3% of WSF’s daily operating costs (58.2% PS, 71.6% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 58.9%
- In comparison PS Westside residents said 51.6%, while Island dependent residents said 34.6%.

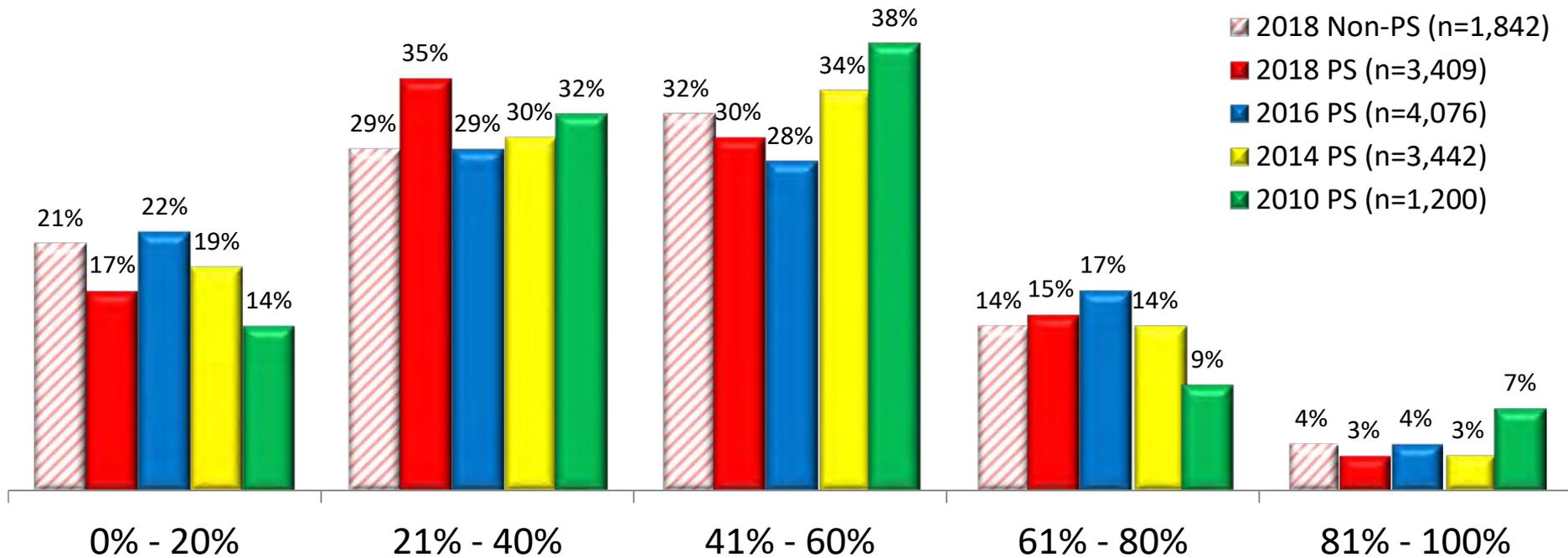
- Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:
- Q18 What percent of the daily operation costs do you feel riders should pay?

# General Public Funding for Annual Operations – 2010-2018



*On average, 2018 Puget Sound residents think that fares cover 43.1% of WSF's annual operating expenses (Eastside 42.6% vs. 48.4% Westside vs. 41.6% Non-PS regions). The average perception of how much fares cover has changed little between 2010 and 2018 within the Puget Sound basin.*

## How Much Do Fares Cover of Annual Operating Costs (2010-2018)

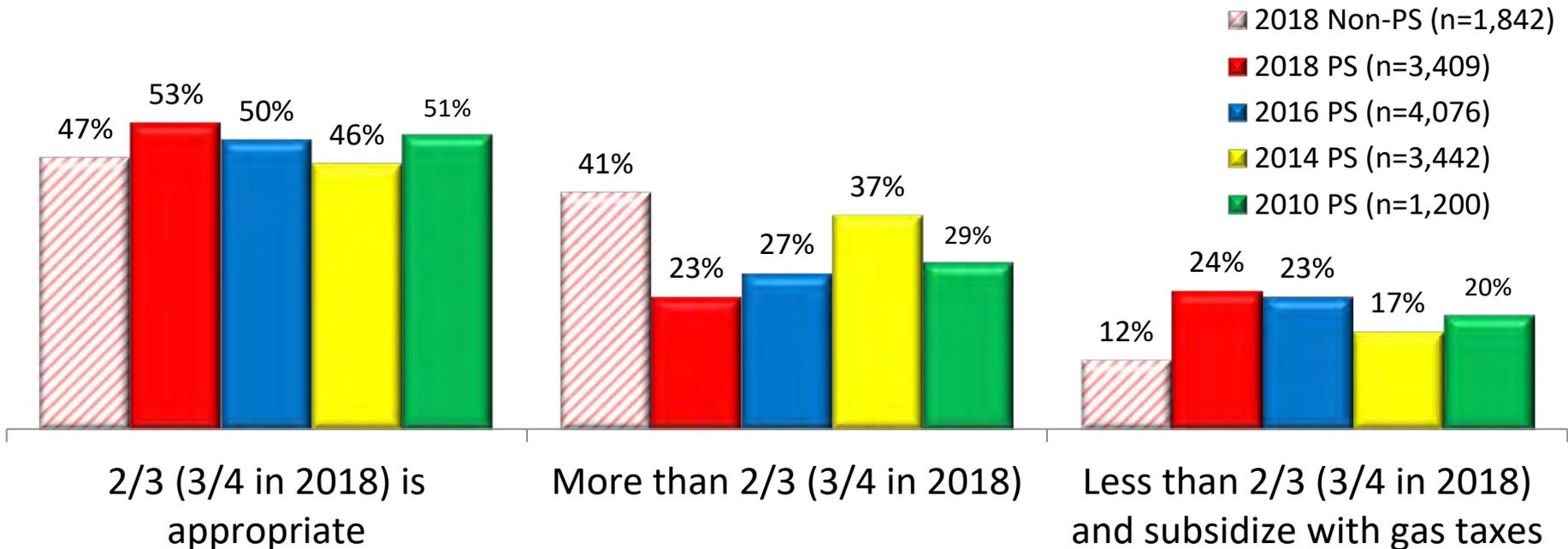


Q19 What percentage of WSF's annual operational costs do you think fares currently cover?



*There is little change in what citizens feel is an appropriate farebox recovery at either the 2/3 or 3/4 cost of annual operations rates. Over four in ten (41%) Non-PS residents feel riders should pay more than 75% of the daily operating costs (down slightly from 43%). One-in-four PS residents feel riders should pay more (23%) while one-in-four feel they should pay less (24%) than 75% of the daily operating costs.*

### How Much Should Fares Cover of Annual Operating Costs



Q20 *On average, fares cover about 75% (three-quarters) of the ferries' yearly operating costs. The other 25% (one-quarter) is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?*



# Reservations – Evaluation of WSF Program by Current Users



### Contains Information Regarding:

- ❖ Usage of WSF Reservation System
- ❖ Usage of WSF Website or Phone for Reservation
- ❖ Satisfaction with WSF Reservation Program
- ❖ Reasons for Reservation Problems / Dissatisfaction
- ❖ Reasons for Reservation Satisfaction
- ❖ Reasonableness of Reservation Program
- ❖ Terminal Staff Handling of Reservation
- ❖ Satisfaction With Phone Handling of Fee Issues

### Information Gathered From The Following Surveys:

- ❖ Reservation Survey (FROG panel)
  - ❖ A study of the FROG panel was conducted in July 2018 concerning the reservation system, including user satisfaction with the system and potential central Puget Sound expansion. 4,988 completed surveys were collected between July 9 and August 3, 2018.

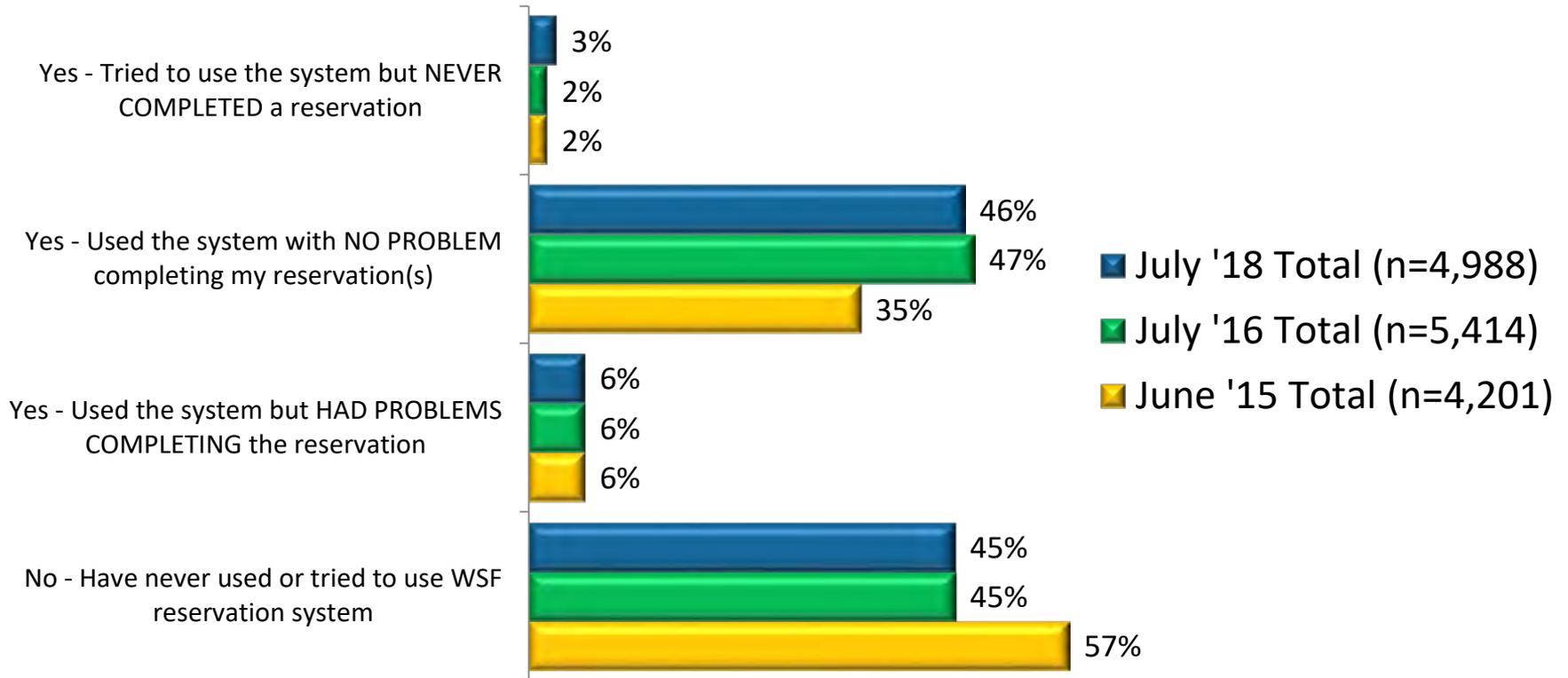
### Key Findings

- ❖ *Eighty-five percent of those who have used the WSF reservation system had no problems. Eleven percent had problems and five percent tried but never could complete their reservation.*
- ❖ *Of the riders that have had no problems, 92% used the WSF website and 4% called WSF.*
- ❖ *The majority of riders who have used the WSF reservation system are satisfied with the system (79%) with 11% being dissatisfied.*
- ❖ *Over half of all riders who said they were satisfied with the reservation system cited as reasons the “Ease Of Website Use” followed by the “Reservation Program Works Well,” and “Can Make Before I Go.”*
- ❖ *The most often cited dissatisfaction reasons with the reservation system are “Hard To Use / Frustrating” followed by “Favors Tourists Over Locals” and “Unreserved Portion – Too Small.”*
- ❖ *Full time San Juan Islands residents are significantly less dissatisfied in 2018 than in 2016.*



Similar to 2016, fifty five percent (55%) of the FROG panel members responding to the 2018 survey have used or tried to use the WSF reservation system. Again, similar to 2016, approximately 85% of those who used the reservation system had no problems completing their reservation. Eleven percent (11%) that used the system had problems and 5% tried to use the system but never completed the reservation.

### WSF Reservation System Usage By All Riders

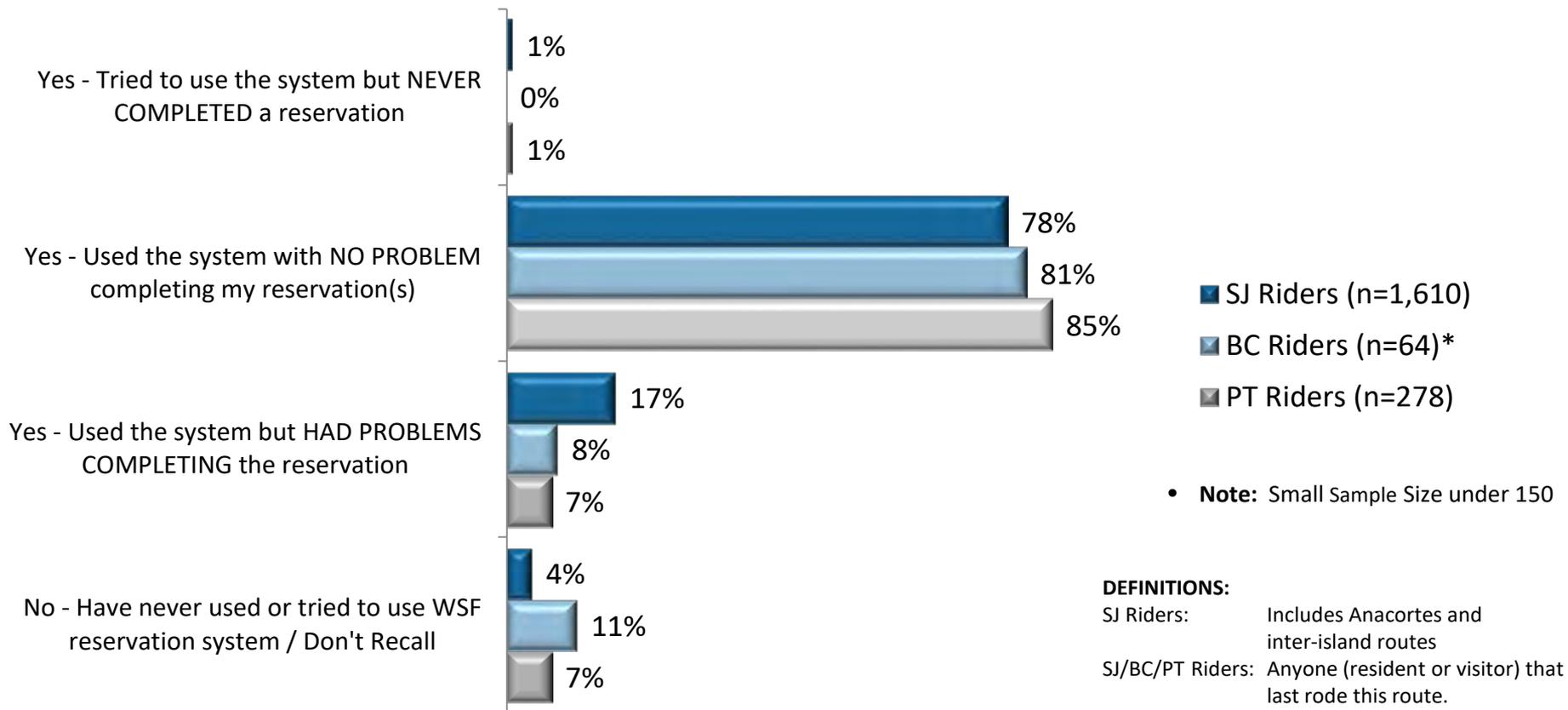


Q.4a Have you ever used or tried to use WSF web/phone reservation program?



*The highest concentration of those having problems completing their reservation are riders in the San Juan Islands (17% in 2018, 19% in 2016).*

**WSF Reservation System Usage by Route**

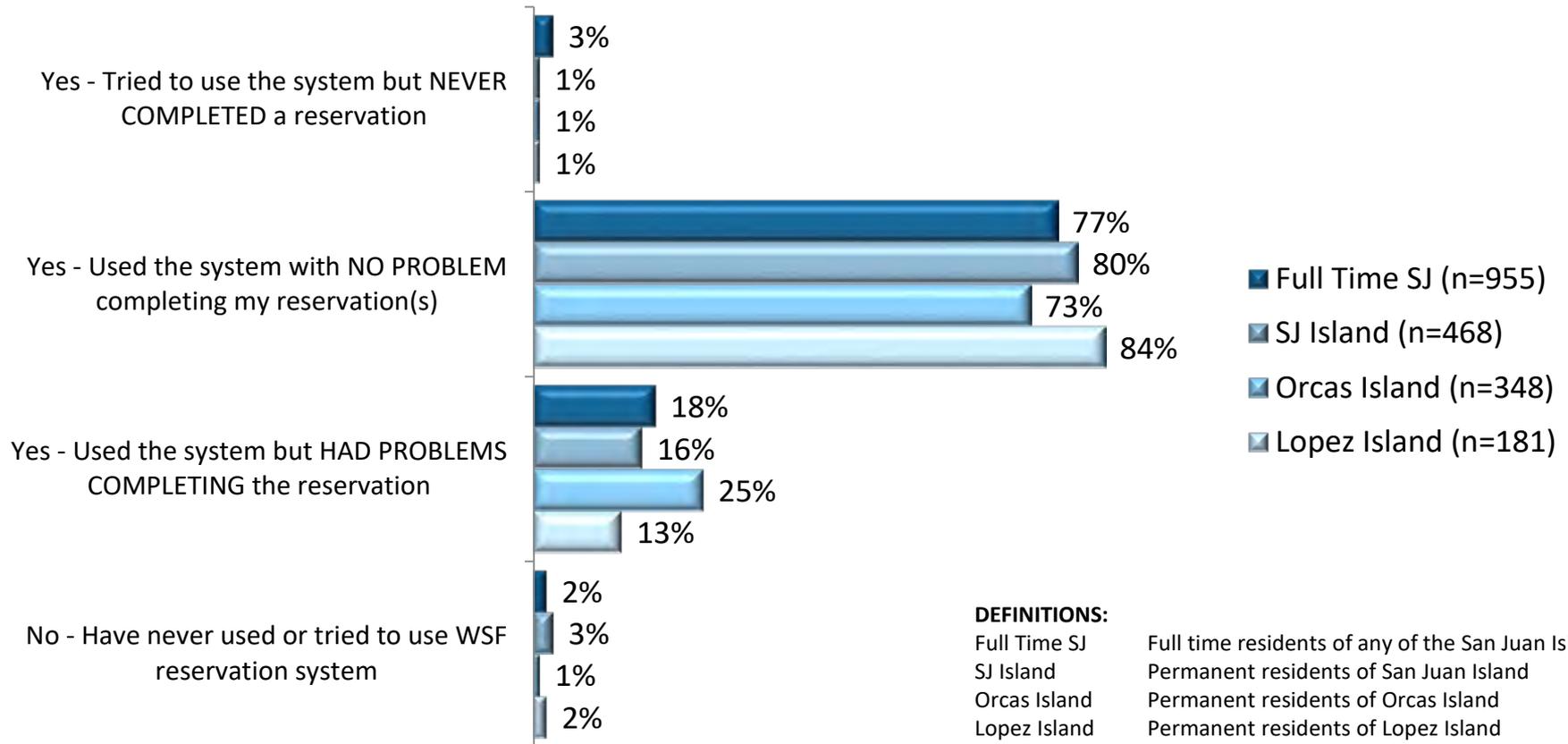


Q.4a Have you ever used or tried to use WSF web/phone reservation program?



*Residents of Orcas Island (25%) had a slightly higher concentration of problems completing their reservations than residents on either San Juan (16%) or Lopez (13%) islands.*

### San Juan Route Reservation System Usage By Full Time SJ Island Residents



Q.4a Have you ever used or tried to use WSF web/phone reservation program?

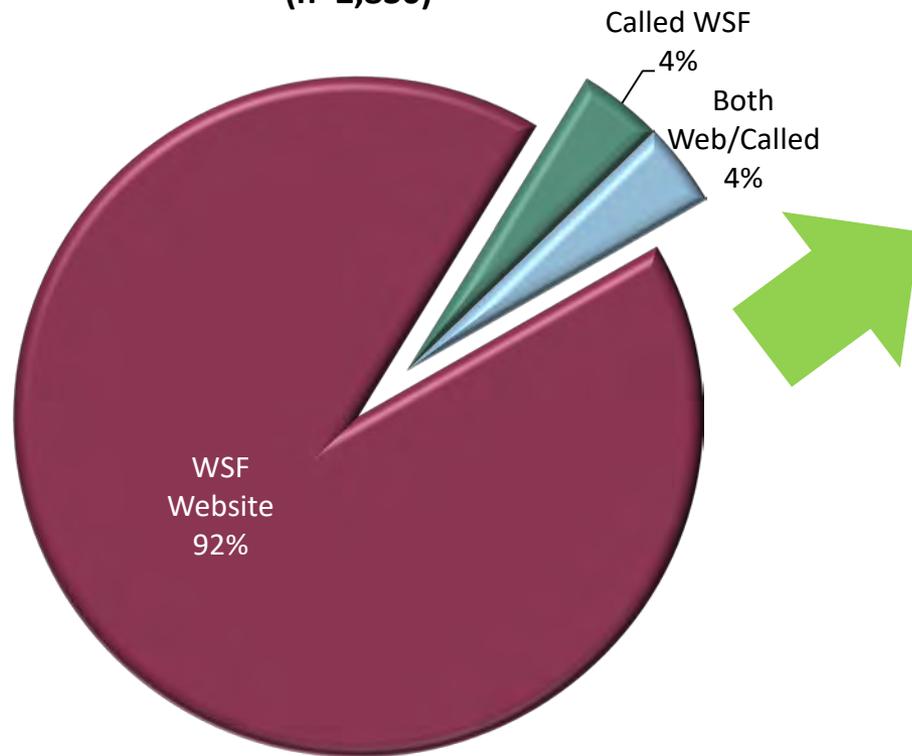
# Reservations

## No Reservation Problems

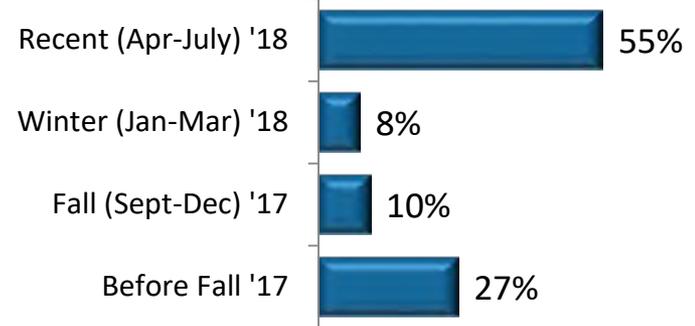


Of the 2,830 riders that have had no problems making reservations, 92% used the WSF website and 4% called WSF, with the majority reporting this activity happened recently (55%).

**Mode of Reservation Contact**  
(n=2,830)



**Reservation Contact Period**  
(multiple mentions)

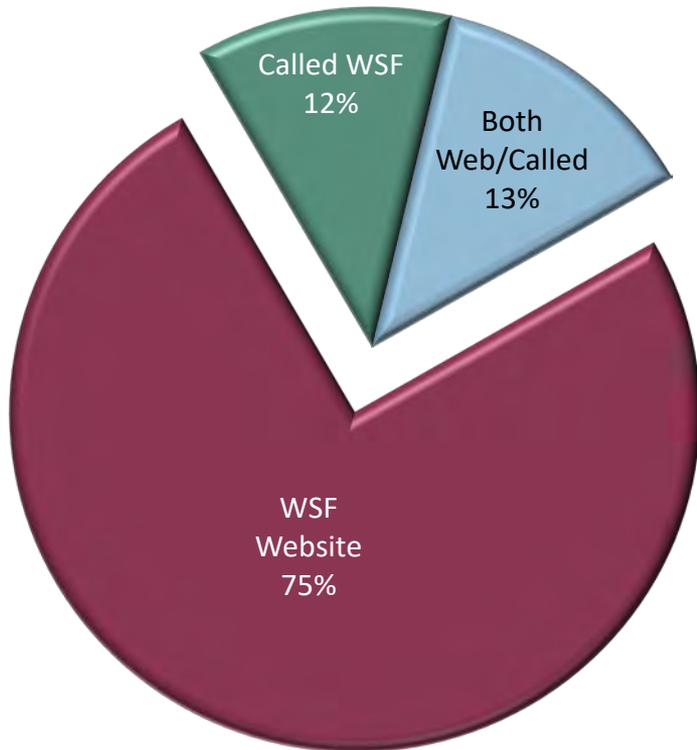


Q4a3a Your LAST reservation was in which month? Q4a3b Which of the following options (web or phone) did you use to complete your LAST reservation?

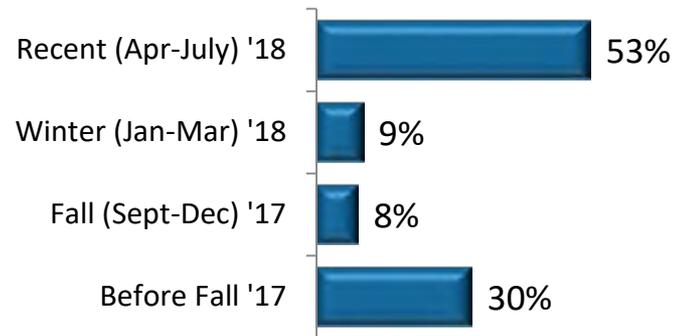


*Of the 440 riders that had problems using reservations, 75% used the WSF website and 12% called WSF, with the majority reporting this activity happened in the last four months (53%). The problem was reported as the last time they used reservations in 61% of the cases.*

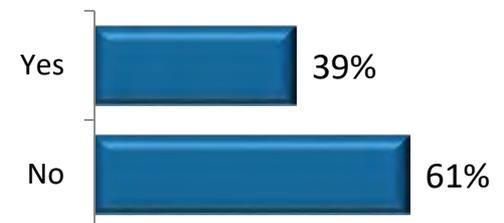
**Mode of Reservation Contact  
(n=440)**



**Problem Reservation Contact Period  
(multiple mentions)**



**Used Reservation Since Last Problem**

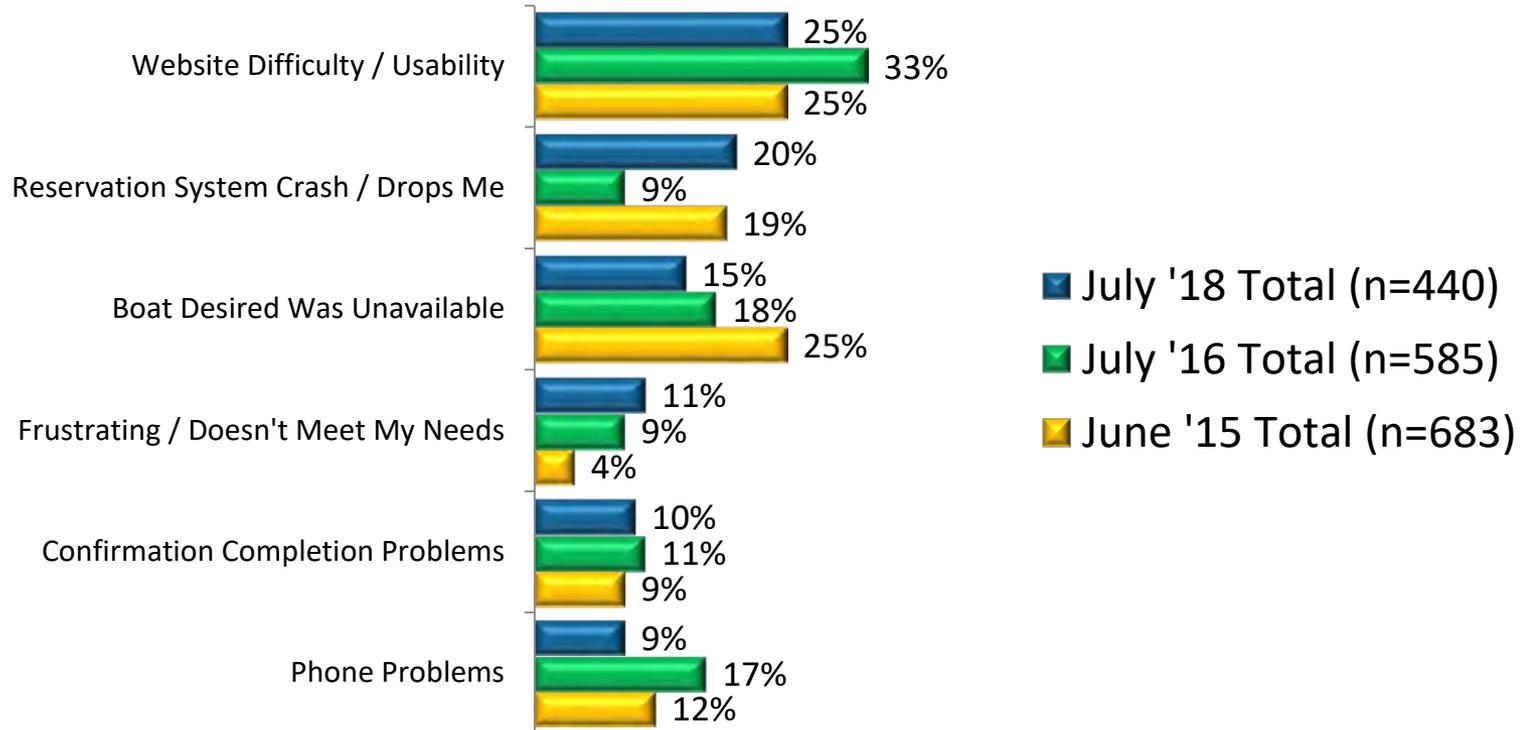


*Q4a2a The LAST time you had problems completing your reservation was in which month? Q4a2b Which of the following options (web or phone) did you use the LAST time you had problems completing your reservation? Q4a2d Have you made any further reservations since you had your last problem?*



*Of the 440 riders who had problems completing their reservation, the most mentioned reason was “Website Difficulty/Usability” issues (25%). The next reason for the reservation system failing them is “Reservation System Crash/Drops Me” (20%) and “Boat Desired Was Unavailable” (15%).*

**Tried To Use WSF Reservation System  
Reason Why It Failed**

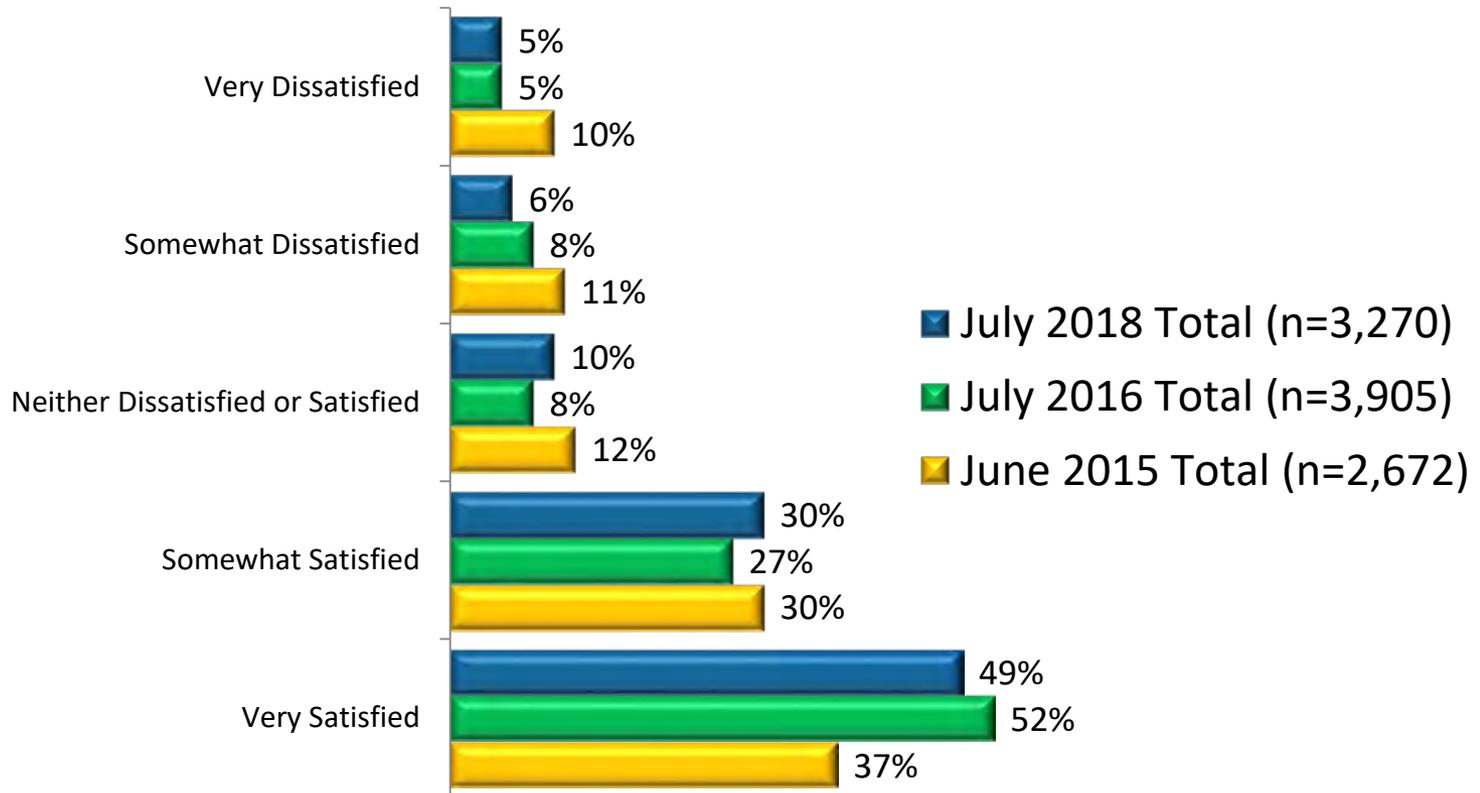


Q.4a2c What issues or problems did you have in completing your reservation?



The 3,270 riders who have used the WSF reservation system were asked how they would rate it. Similar to 2016, the majority of 2018 users are satisfied with the system (79%) with 11% being dissatisfied. This is an improvement over the results from 2015 but no real change from 2016 (79% satisfaction / 13% dissatisfaction).

### WSF Reservation System Rating – All Routes

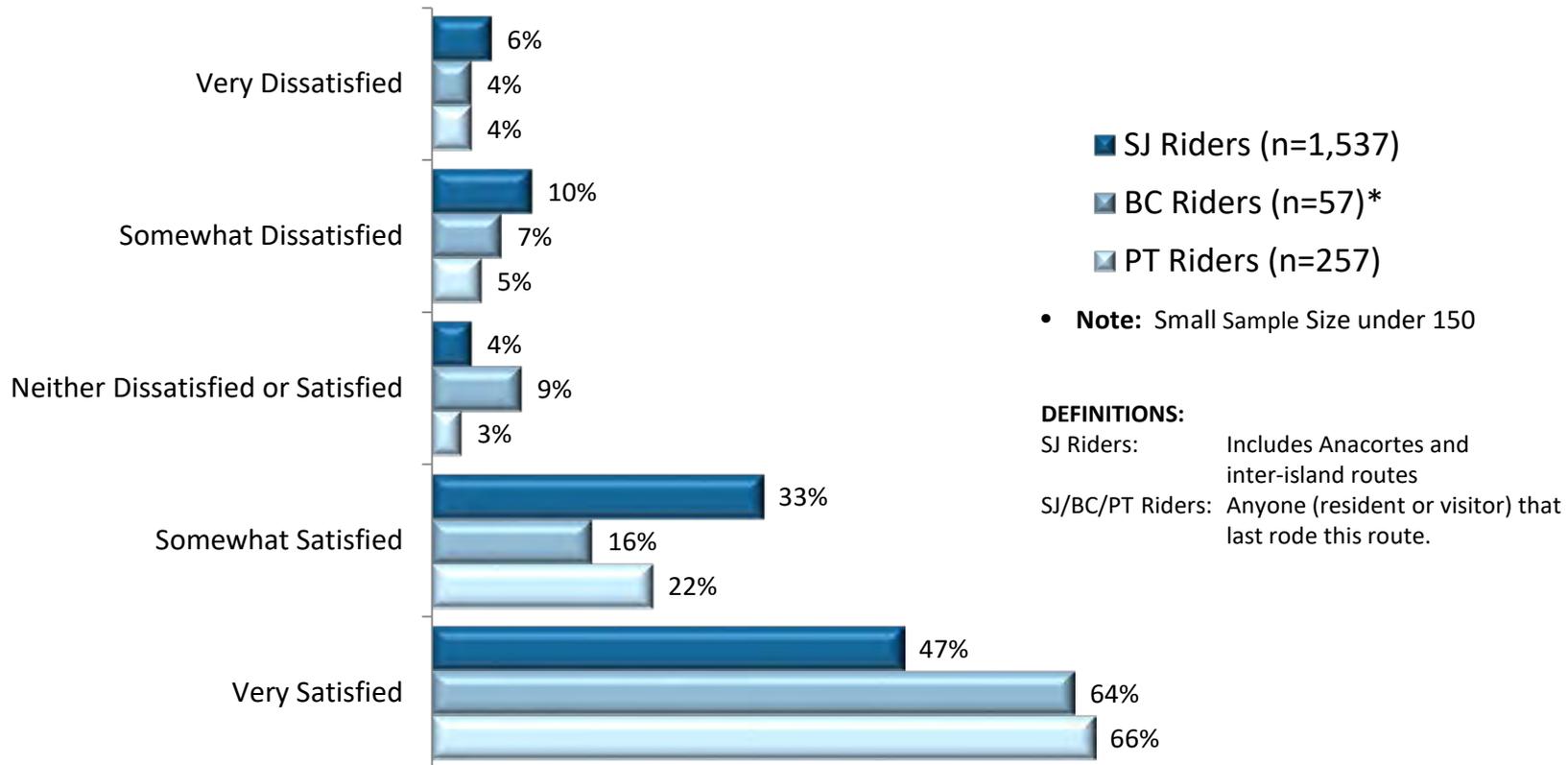


Q.5 Overall, based on your experience, how would you rate the reservation system?



When broken out by last route used, the riders on the Anacortes - San Juan Island routes have a slightly higher level of dissatisfaction (16%) than found on the Anacortes - Sidney (11%) and Port Townsend – Coupeville (9%) routes. However, the dissatisfaction is lower in 2018 (16%) than found in 2016 (21%) for San Juan riders.

**WSF Reservation System Rating by Last Route Taken**

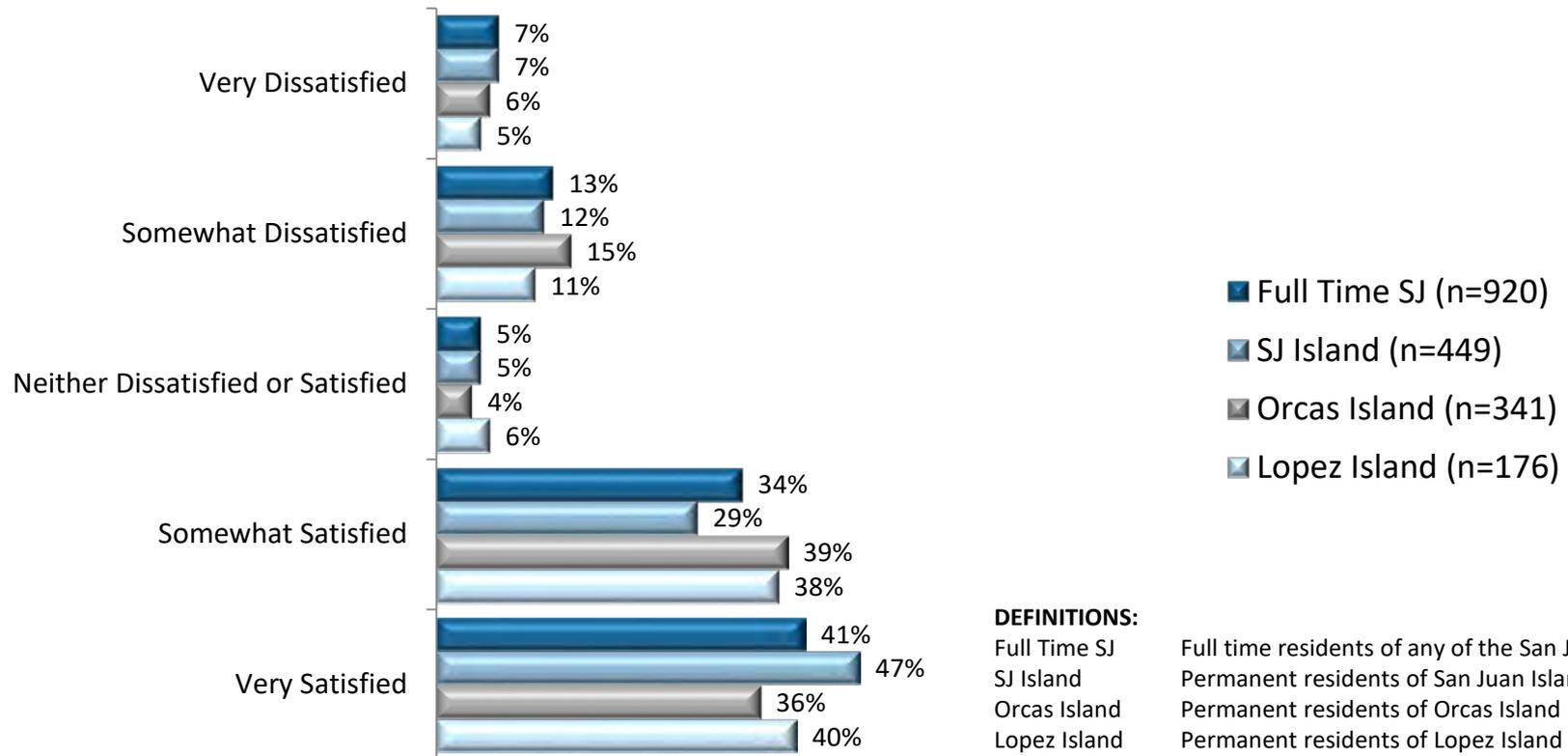


Q.5 Overall, based on your experience, how would you rate the reservation system?



*Dissatisfaction is down for permanent residents on all islands (20% in 2018 – down from 26% in 2016). When broken out by the San Juan County residency, riders living on Orcas (21% - down from 23% in 2016) are the most dissatisfied (Very + Somewhat) followed by San Juan Island (19% - down from 25% in 2016) and Lopez Island (16% - down from 32% in 2016).*

### WSF Reservation System Rating - Full Time Resident By Island

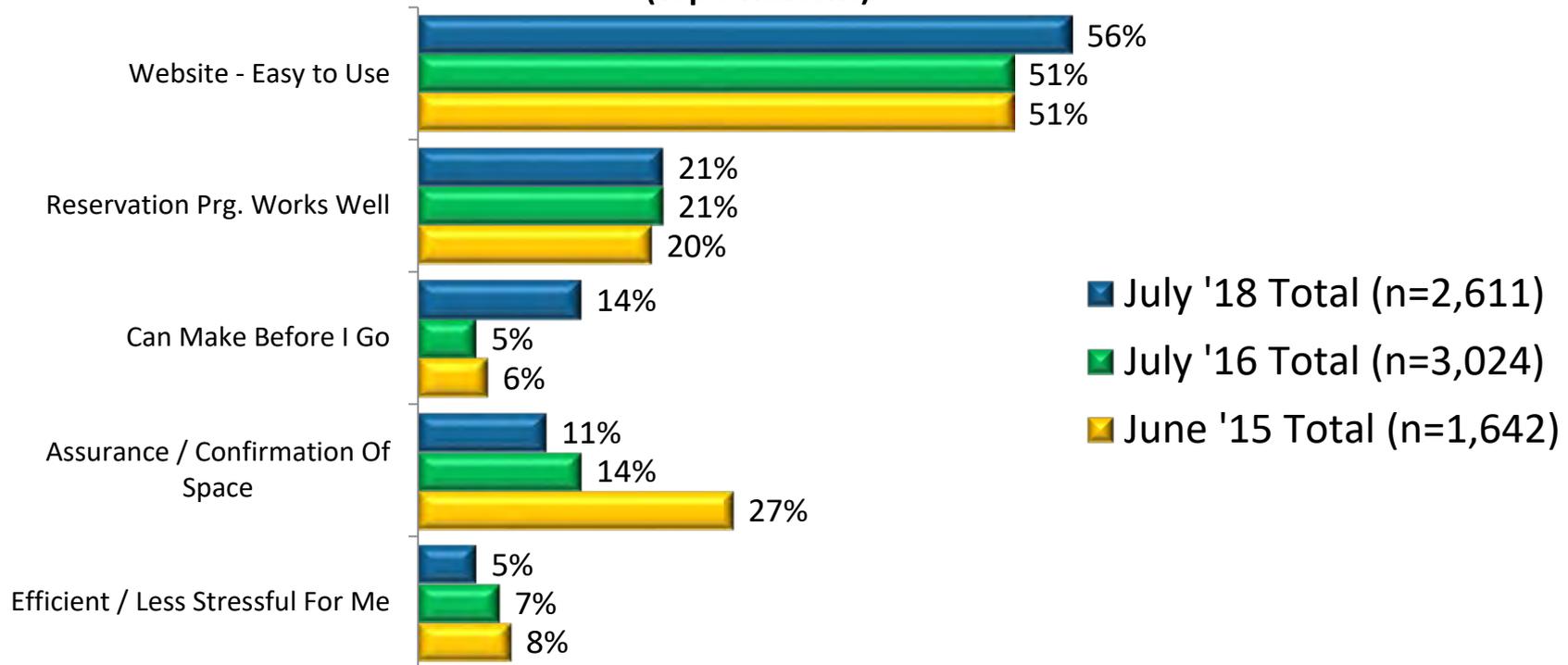


Q.5 Overall, based on your experience, how would you rate the reservation system?



System-wide 2,611 riders said they were very or somewhat satisfied with the reservation system and were asked what specific parts they were satisfied with. Over half (56%) cited the “Ease Of Website Use” followed by the “Reservation Program Works Well” (21%) and they “Can Make Before I Go” (14%).

**The Part(s) Of The Reservation System I Am Satisfied With Are ...  
(Top 5 Reasons)**

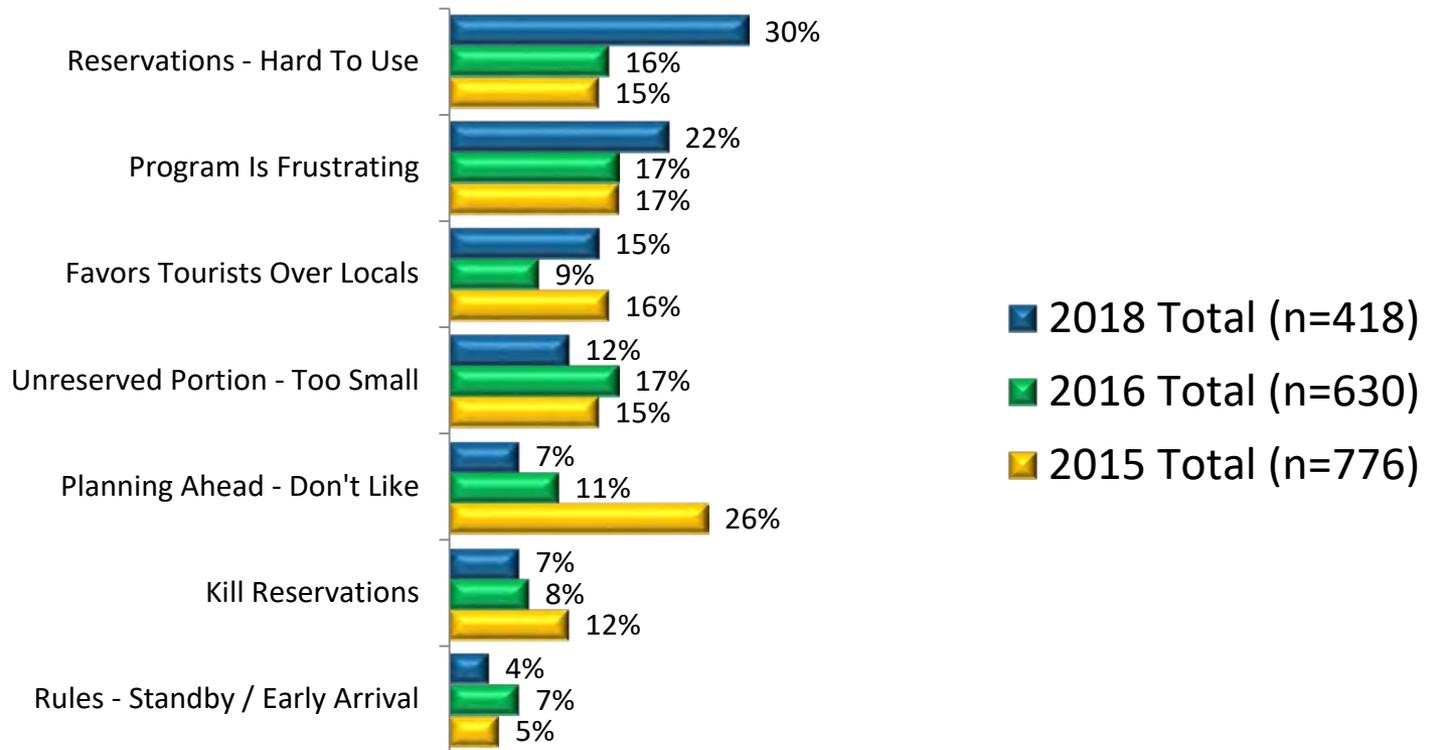


Q.6c Based on your experience, what specific parts of the reservation system are you satisfied with?



The most often cited reasons for being dissatisfied with the reservation system are “Reservations – Hard To Use” (30%) and “Program Is Frustrating” (22%) followed by “Favors Tourists Over Locals (15%) and “Unreserved Portion – Too Small” (12%).

**The Part Of The Reservation System I Am Dissatisfied With Is ...**  
**Top 7 Reasons**

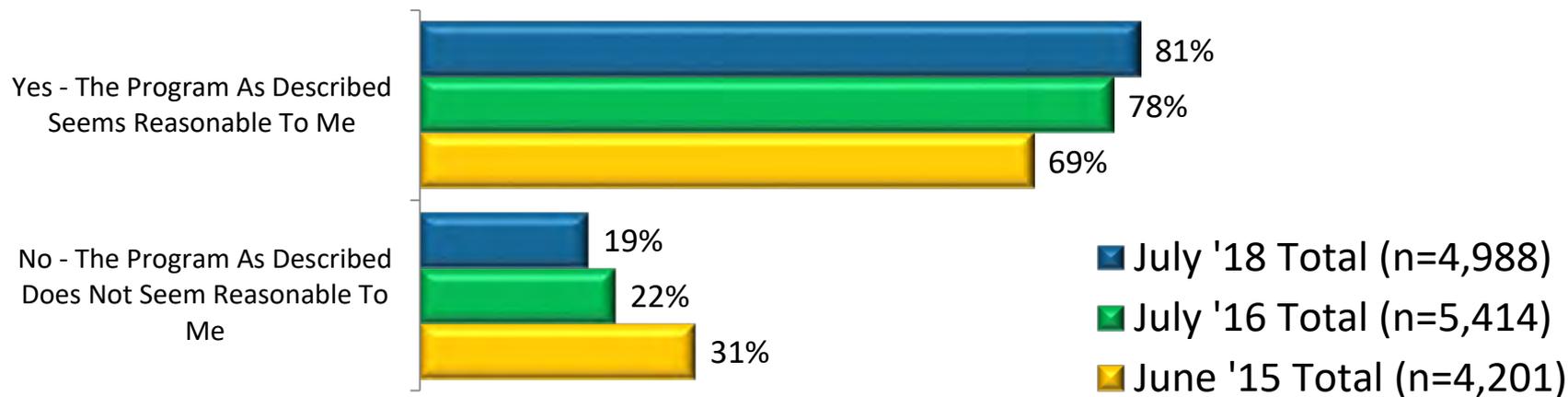


Q.6a Based on your experience, what specific parts of the reservation system are you dissatisfied with and how might we change it?



A description of the current WSF reservation system was provided and respondents were asked if it seemed reasonable to them. A majority in 2018 (81%) said it did seem reasonable, while 19% said it seemed unreasonable. This is similar to what was found in 2016 (78%, 22% respectively).

### Reasonableness of WSF Reservation Program



*Q.7a Reservations have been implemented on limited routes in the North Sound to better accommodate high travel demand on longer routes with consistently large numbers of occasional/recreational riders. Reservations provide predictability around travel times and allows travelers to plan their trips with more reliability. The current approach to reservations is done via a tiered reservation system and here is how it currently works:*

**For Port Townsend/ Coupeville & Anacortes/ Sidney BC sailings:**

*All reservations for a sailing schedule season are available two months prior to the start of the season. Up to 80% of the space on the Port Townsend route and 100% of the space on the Anacortes (99% on Sidney B.C.) route can be reserved.*

**For San Juan sailings:**

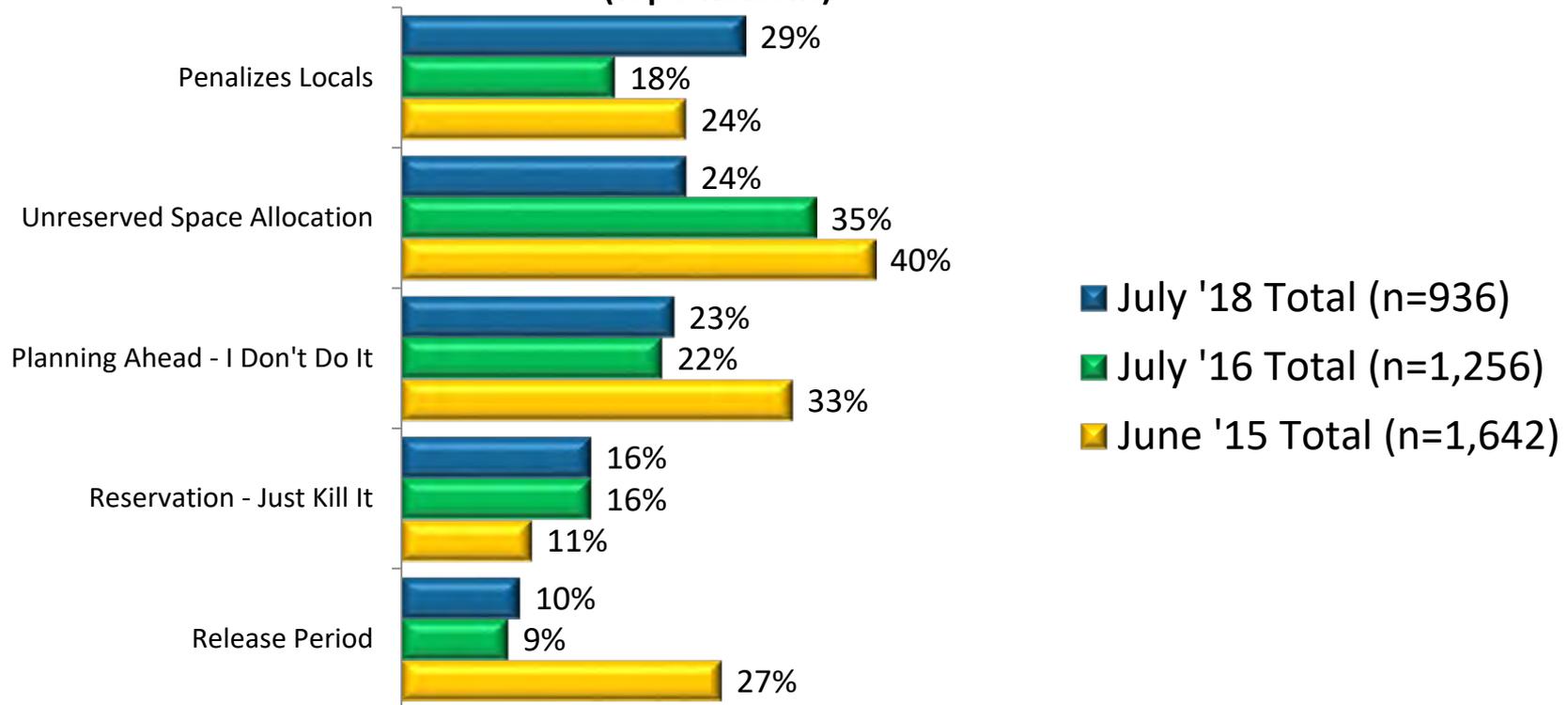
*Reservations are available for up to 90% of the San Juan Island sailing space. Two months ahead of the sailing schedule season, 30% of the regular height space (typically general vehicles) and 100% of all tall height space (vehicles over 7'2" high or over 30' long – typically commercial vehicles/Motorhomes/RVs) becomes available for reservations. At 7 am two weeks prior to any individual travel day, an additional 30% of the regular height space becomes available. The remaining 30% becomes available at 7 am two days prior to the travel day.*

*Based upon the above, does the WSF reservation program seem reasonable to you?*



The 936 riders who felt the reservation system description as presented was unreasonable were asked why and what they might change. The most often mentioned reason for being unreasonable was “Penalizes Locals” (29%) followed by “Unreserved Space Allocation” (24%) and the rider not liking to “Plan Ahead” (23%). Sixteen percent (16%) said they would just kill the reservation program.

**The Parts Of The Reservation System That Are Unreasonable  
(Top 5 Reasons)**

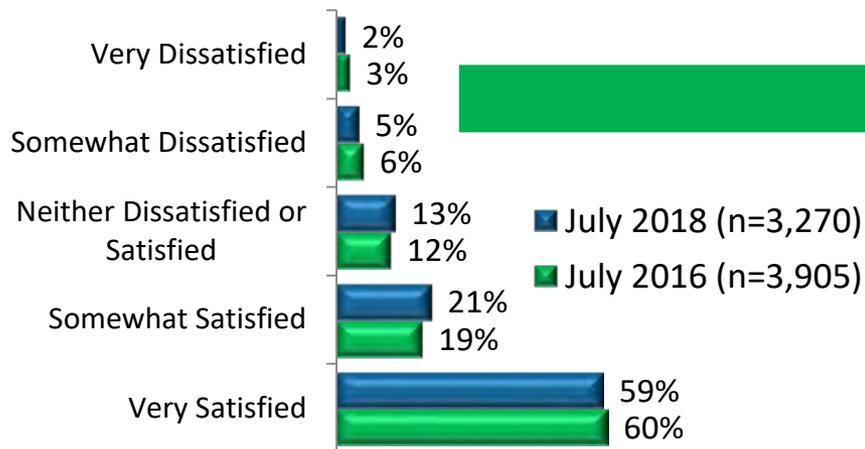


Q.7b Please tell us why it does not seem reasonable to you and how we might change it.

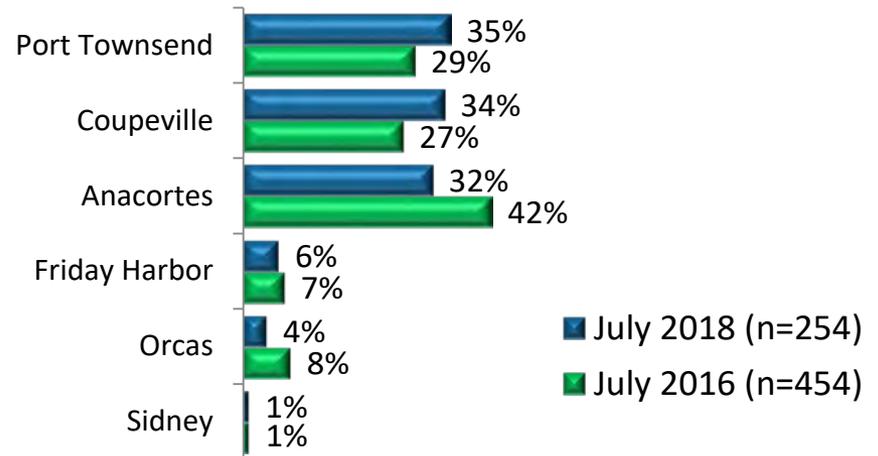


The 3,270 riders who have used the WSF reservation system were asked to rate the customer service they received when they arrived at the terminal. Similar to 2016, only 7% in 2018 are dissatisfied with the terminal customer service with Port Townsend, Coupeville, and Anacortes terminals each getting about a third of the mentions. Full time San Juan Islands residents are significantly less dissatisfied (10%) in 2018 than in 2016 (19%). Part time residents (8%) and San Juan Islands visitors (5%) in 2018 are similar to 2016 (9%, 8% respectively). Those reporting they had a problem with their reservation (19%) are significantly more likely to say they are dissatisfied with terminal staff than those reporting no reservation problems (6%). San Juan Island residents reported more problems with terminal staff (11%) than Orcas Island (9%) or Lopez (7%) residents. However, dissatisfaction with terminal staff handling of reservation is down in all three islands from the 2016 study.

**Terminal Staff Reservation Handling Rating**



**Problem Terminal for Dissatisfied**

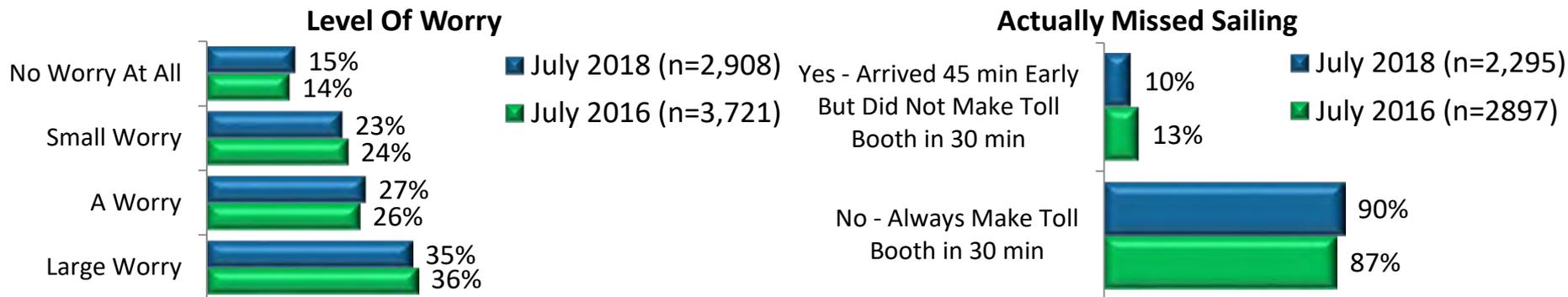


Q6f We would like to get your ratings on a couple specific aspects of the reservation process. For this question, please think of only your arrival(s) at the terminal when you have a reservation. How would you rate WSF's handling of your reservation when you arrived at the terminal? Q6f2 At which terminal(s) were you dissatisfied with how the terminal staff handled your reservation? Q6f3 What specifically was the issue or problem that you had with how the terminal staff handled your reservation?



The 2,908 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were asked about their level of anxiety over not making the tollbooth in time and thus losing their reservation.

- Similar to 2016, 35% in 2018 say it is a large worry while 62% say it is either a worry or large worry to them.
- Similar to 2016, only 10% in 2018 actually have experience not getting to the tollbooth on time.
- Full time San Juan Islands residents worry (“A worry” + “Large Worry”) more so (71% in 2018, 77% in 2016) than part time San Juan Islands residents (64% in both 2018/2016) or San Juan Islands visitors (62% in 2018, 57% in 2016).
- San Juan (74%) and Lopez (72%) residents worry more than Orcas (67%) Island residents.
- Full time San Juan Islands residents have actually missed sailings (18% in 2018, 21% in 2016) more often than part time San Juan Islands residents (11% in 2018, 12% in 2016) or San Juan Islands visitors (7% in 2018, 9% in 2016).
- Actual missed sailings is highest among San Juan (21%) residents following by Orcas (16%) and Lopez (14%).

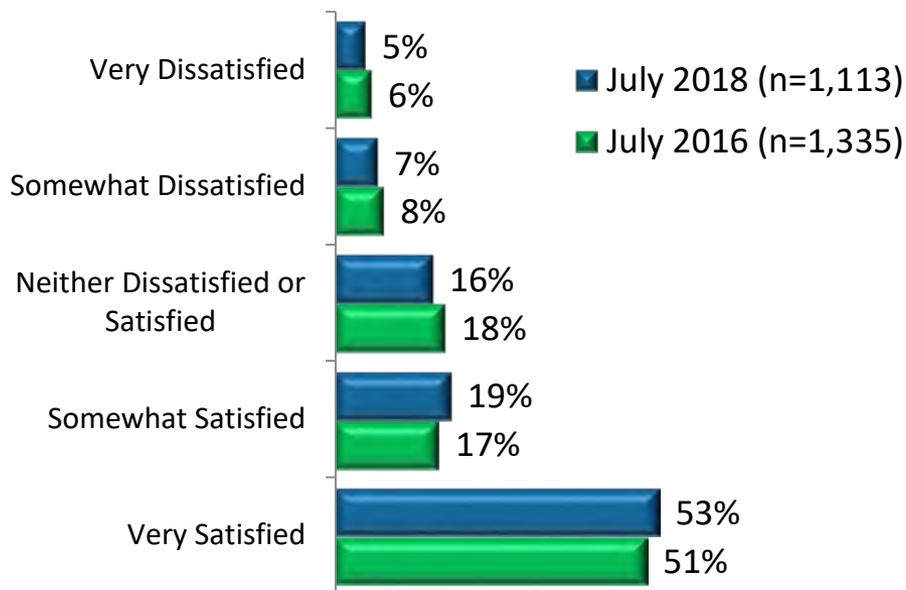


*Q6g Background: At Anacortes, Friday Harbor and Orcas Island, vehicles with reservations must check in at the toll booth at least 30 minutes prior to their reserved departure time. Vehicles that do not check in at the toll booth 30 minutes ahead of the reservation time will lose their reservation and just travel standby. Drivers are encouraged to arrive at the end of the line at least 45 minutes prior to their reserved departure time so that they reach the toll booth within 30 minutes of reserved departure time. Drivers are responsible for ensuring that they reach the toll booth 30 minutes in advance of their reservation. Question: During the summer, how big a worry to you is arriving at the terminal within 45 minutes of your reserved departure time, knowing you can lose your reservation if you are late, and thus put on standby because you did not make the toll booth within 30 minutes of your reserved departure time. Q6h During the last 12 months have you ever arrived within 45 minutes of your reserved departure time and not made the tollbooth within 30 minutes of your reserved departure sailing?*



*The 1,113 riders who have used the WSF phone staff to handle reservation issues and no-show fee reversals were asked how they would rate the customer service of the phone staff. Similar to 2016, 12% in 2018 are dissatisfied with how they were handled. Full time San Juan Islands residents (15% in 2018, 20% in 2016) are more likely to be dissatisfied with the phone staff handling of fee issues than part time San Juan Islands residents (11% in 2018, 12% in 2016) or San Juan Islands visitors (11% in 2018, 10% in 2016). Orcas Island residents (17%) are slightly more likely to be dissatisfied with the phone staff than either San Juan (14%) or Lopez (14%) Island residents.*

### Phone Staff Handling Fee Issues



❖ Comments given by riders as to the phone staff issue or problem they encountered included:

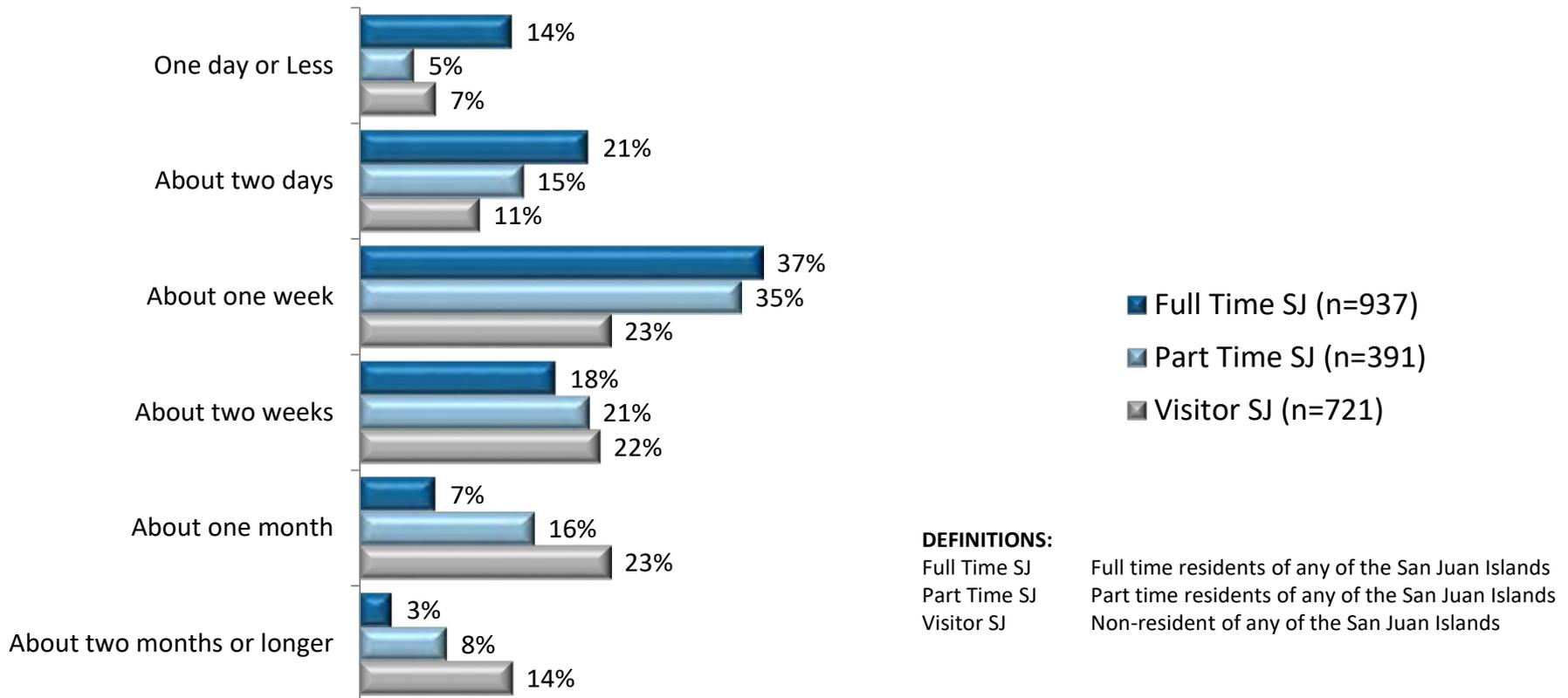
- It can take a long time to speak with someone.
- I shouldn't have to call to straighten things out after I was checked in on some handheld computer.
- I have either never gotten through to a person or the person on the other end could not answer my question. I don't think it's a help for islanders to call anyone off island.
- The operator immediately took a suspicious attitude toward me, which is insulting, then she refused to believe I was telling the truth. I still had my ferry ticket as proof I was on the boat and that is the only reason the no-show fee was removed.

*Q6m Based on your experience, if any (mark don't know if none), how would you rate WSF telephone customer service when you have called to have reservation fees or no-show fees reversed? Q6m2 What specifically was the issue or problem that you had with reversing a reservation or no show fee?*



*Full time and part time island residents along with visitors who have taken or are likely to take the Anacortes / San Juan Islands route were asked to describe their typical lead time before they need to take the ferry. Full time residents of the San Juan Islands (14%) are two to three times more likely to say they only know one day or less in advance compared to part time residents (5%) or visitors (7%).*

### Anacortes-San Juan Islands Travel - I Typically Know In Advance Of The Time/Date



Q.9c Which statement below best describes your typical (80% to 90% of the time) lead time before you need to take the:



# Recreational Riders – Usage and Evaluation of WSF During Summer Season



### Contains Information Regarding:

- ❖ Last Recreational Trip Timing & Route Used
- ❖ Boarding Method, Vehicle Size and Ticket Type Uses
- ❖ Number of Crossings & Trip Duration
- ❖ Purpose of Recreational Trip
- ❖ Relative Cost of Ferry Fare to Total Trip Costs
- ❖ Factors Influencing Ferry Usage For Recreational Travel

### Information Gathered From The Following Surveys:

- ❖ Summer Riders Survey (FROG panel)
  - ❖ A survey was conducted of FROG panel members in October 2018 focusing on customer service performance issues and recreational usage of WSF. A total of 4,925 completed surveys were collected (between Sept 30 to Oct 21, 2018).
- ❖ Onboard Intercepts of Non-FROG riders
  - ❖ The onboard intercepts are a short recreational usage and satisfaction survey conducted with non-FROG members across all WSF routes. The survey is conducted during the peak summer travel period with ferry riders who are not part of the FROG panel testing: A total of 7,810 surveys were completed (July 12 to Aug 11, 2018).

### Key Findings

- ❖ *The most recent recreational/social trips were in September, with Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton the top three last recreational routes*
- ❖ *The majority of summer recreational riders boarded as either a vehicle driver or passenger.*
- ❖ *Walk-on riders account for one in five of all recreational riders and is highest on the Seattle/Bremerton route.*
- ❖ *The plurality of respondents visit family or friends as the main recreational trip purpose. Going to a vacation home is highest on the Anacortes/San Juan route while camping / backpacking is highest on the Coupeville/Port Townsend route.*
- ❖ *The ferry fare as a percent of total recreational/social trip cost is significantly lower for non-FROG respondents (those intercepted on-board) than for FROG panel members.*
- ❖ *Ferry fare as a percentage of the total trip costs has declined since 2016 for both panel members and onboard riders.*

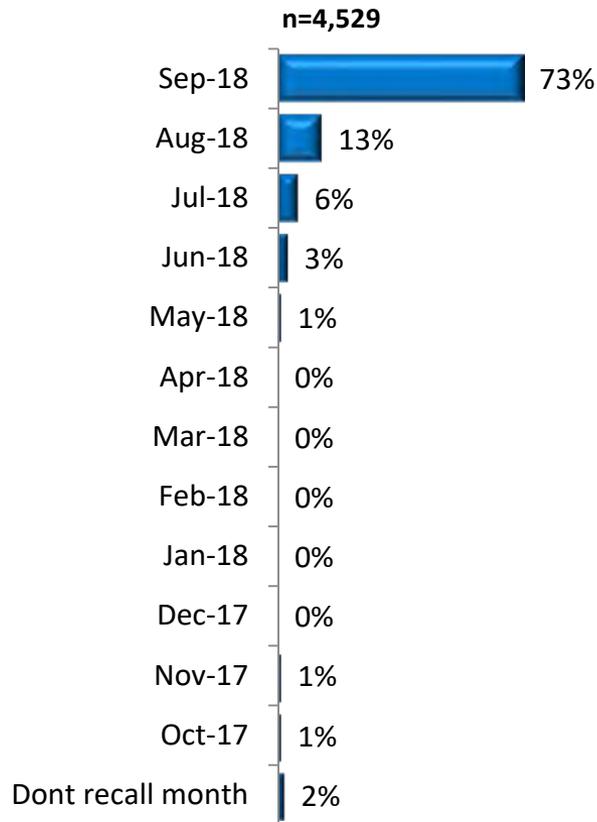
# Recreational Riders

## 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 both in 2018 and 2016. Overall there has been little change in routes riders use for recreational/social trips.*

### Month of last Recreational/Social Trip



### Route of last Recreational/Social Trip

n=3,761

Route	2018	2016	Shift
Seattle/Bainbridge	23%	25%	-2%
Edmonds/Kingston	17%	17%	0%
Mukilteo/Clinton	15%	15%	0%
Seattle/Bremerton	12%	10%	+2%
Anacortes/San Juan Islands	11%	11%	0%
Fauntleroy/Vashon	7%	7%	0%
Coupeville/Port Townsend	6%	6%	0%
Fauntleroy/Southworth	4%	3%	+1%
Point Defiance/Tahlequah	2%	3%	-1%
Anacortes/Sidney B.C.	1%	1%	0%
Southworth/Vashon	1%	1%	0%
San Juan Interisland	1%	0%	+1%

Q2. In which month did you take your most recent recreational or social trip that used WSF (of those using WSF during summer period)?

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

# Recreational Riders

## Most Recent Boarding Terminal



*The following information outlines the boarding terminals respondents used on their most recent recreational or social trip. The majority of recreational/social riders board from the westside of Puget Sound or the island side in the case of Vashon. Coupeville/Pt. Townsend and Anacortes are the only routes where more riders enter from the eastside terminals.*

### Boarding Terminal Of Recreational Riders' Last Route Taken

Seattle/ Bainbridge		Seattle/ Bremerton		Point Defiance/ Tahlequah		Edmonds/ Kingston		Fautleroy/ Vashon		Fautleroy/ Southworth	
n=403		n=141		n=44		n=275		n=149		n=89	
Seattle	34%	Seattle	33%	Point Defiance	34%	Edmonds	43%	Fautleroy	42%	Fautleroy	45%
<b>Bainbridge</b>	66%	<b>Bremerton</b>	67%	<b>Tahlequah</b>	66%	<b>Kingston</b>	57%	<b>Vashon</b>	58%	<b>Southworth</b>	55%

Southworth/ Vashon		Coupeville/ Pt. Townsend		Mukilteo/ Clinton		Anacortes/ San Juan Islands		San Juan Interisland		Anacortes/ Sidney B.C.	
n=17		n=184		n=347		n=844		n=24		n=34	
Southworth	29%	<b>Coupeville</b>	56%	Mukilteo	34%	Orcas	29%	<b>Orcas</b>	55%	<b>Anacortes</b>	65%
<b>Vashon</b>	71%	Pt Townsend	44%	<b>Clinton</b>	66%	Shaw	1%	Shaw	0%	Sidney BC	25%
						Lopez	11%	Lopez	20%	Friday Harbor	11%
						Friday Harbor	26%	Friday Harbor	25%		
						<b>Anacortes</b>	33%				

Q4. To start with, from which terminal did you depart on your most recent trip?

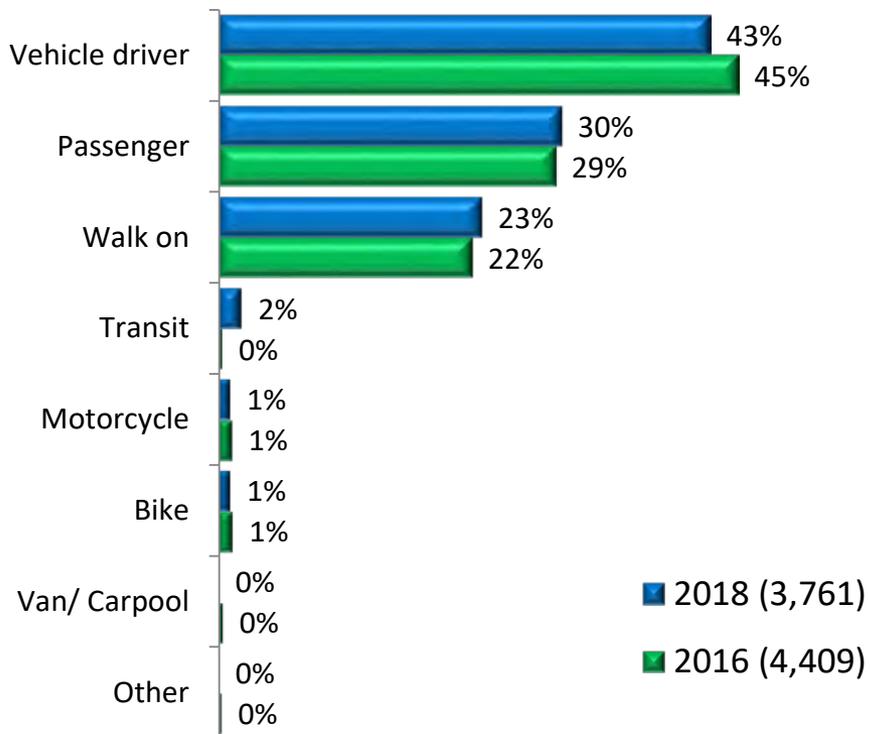
# Recreational Riders Boarding Method



The majority (73%) of summer recreational riders boarded as either a vehicle driver or passenger. Of those that drove on, seven in ten (71%) boarded in a mid sized auto/SUV/pick-up (14-22 feet). Walk-on riders account for one in five (23%) of all recreational riders in both 2018 and 2016. Walk-on ridership is highest on the Seattle/Bremerton route (56%).

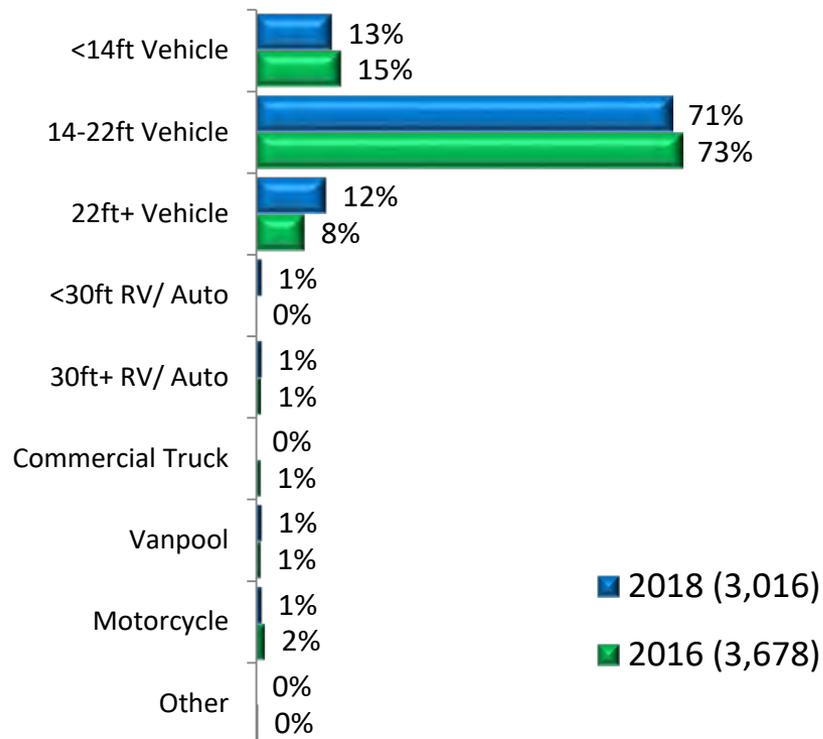
## Boarding Method

Among FROG panel recreational riders



## Vehicle Type

Among FROG panel recreational riders



Q5. How did you board your last ferry ride? (Multiple Response)

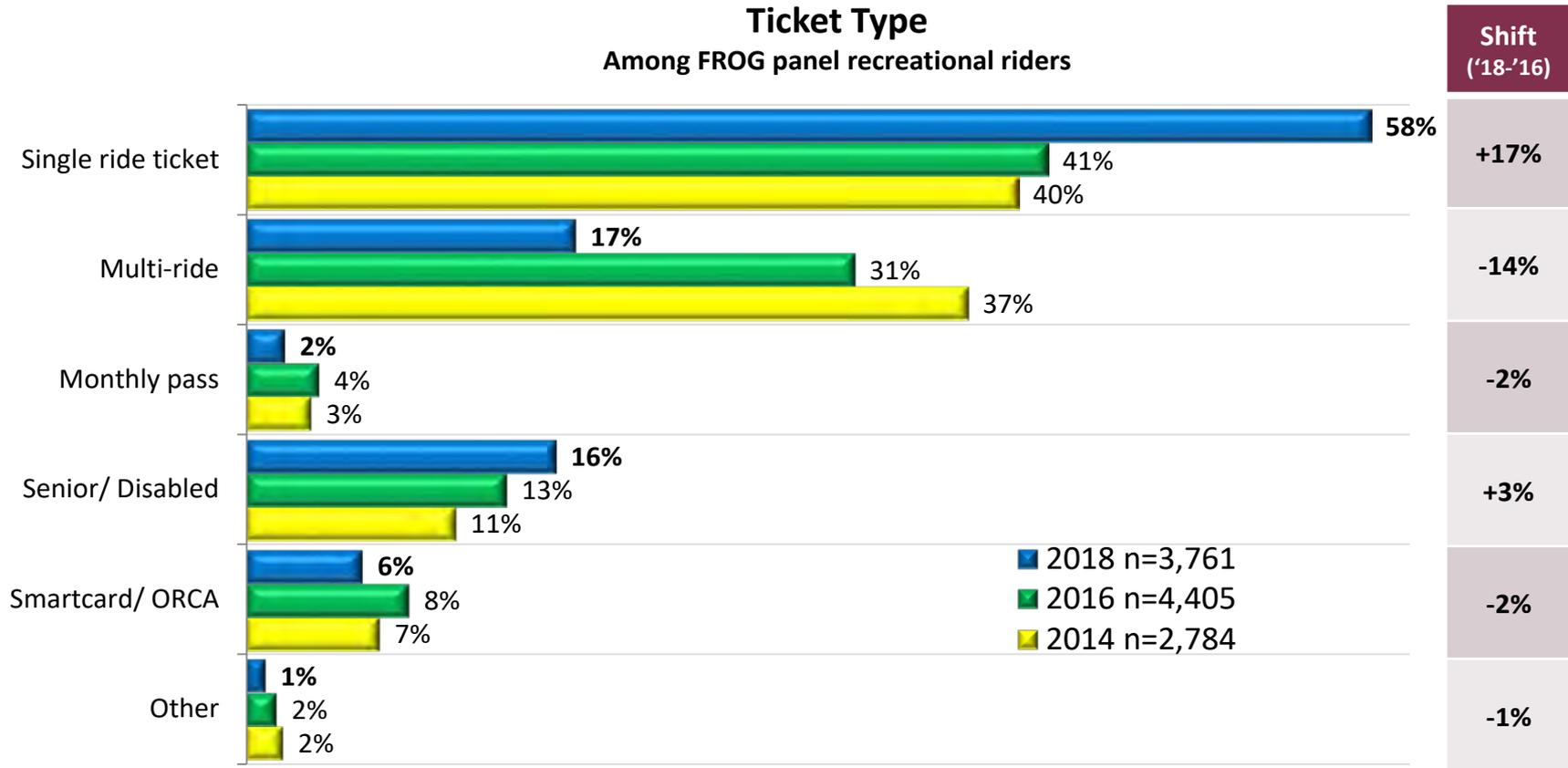
Q6. Which of the following best describes the vehicle you drove on the ferry?

# Recreational Riders

## Ticket Type



Summer recreational riders are likely to use single ride tickets more than multi-ride tickets when traveling. Since 2014 there has been a downward shift in multi-ride ticket type usage (dropping from 37% to 17%) while single ride tickets increased from 40% to 58%. Single ride tickets are more often used on Seattle/Bainbridge (66%) and Seattle/Bremerton (69%) routes.



Q8. On what kind of ticket were you travelling?

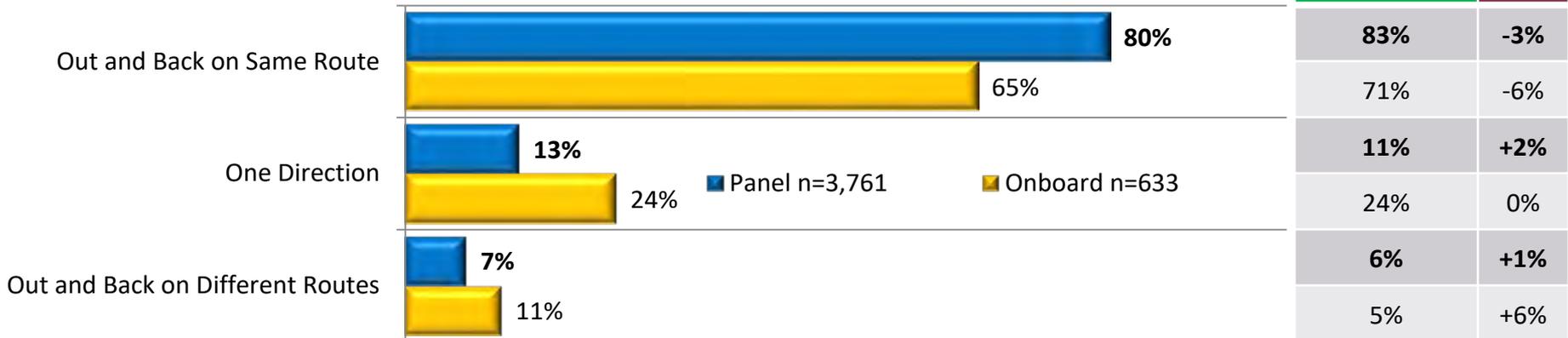
# Recreational Riders

## Crossings and Trip Duration



Anacortes/San Juan (5.3 days) and Anacortes/Sidney (5.1) continue to have the longest average trip duration with Seattle/Bremerton (1.5) having the shortest. Non-FROG summer recreational riders trip duration is 5.6 days.

### Number of Crossings on Most Recent Trip - 2018



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
2018 Respondents		3,761	700	243	73	386	274	151	27	209	533	1,076	51	38
2018 FROG	Mean number of days	2.5	2.2	1.5	2.6	2.1	1.8	1.7	1.6	3.3	2.3	5.3	4.4	5.1
2016 FROG	Mean number of days	2	2	1	1	2	2	1	1	3	2	4	2	4
2014 FROG	Mean number of days	2	2	1	2	2	2	1	2	3	2	4	2	5
2018 Onboard	Mean number of days	5.6	Based on the 633 intercepts with non-FROG summer recreational riders: This trip was the first WSF ride for 25% of them. There were 2.9 people on average in their traveling unit.											

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?

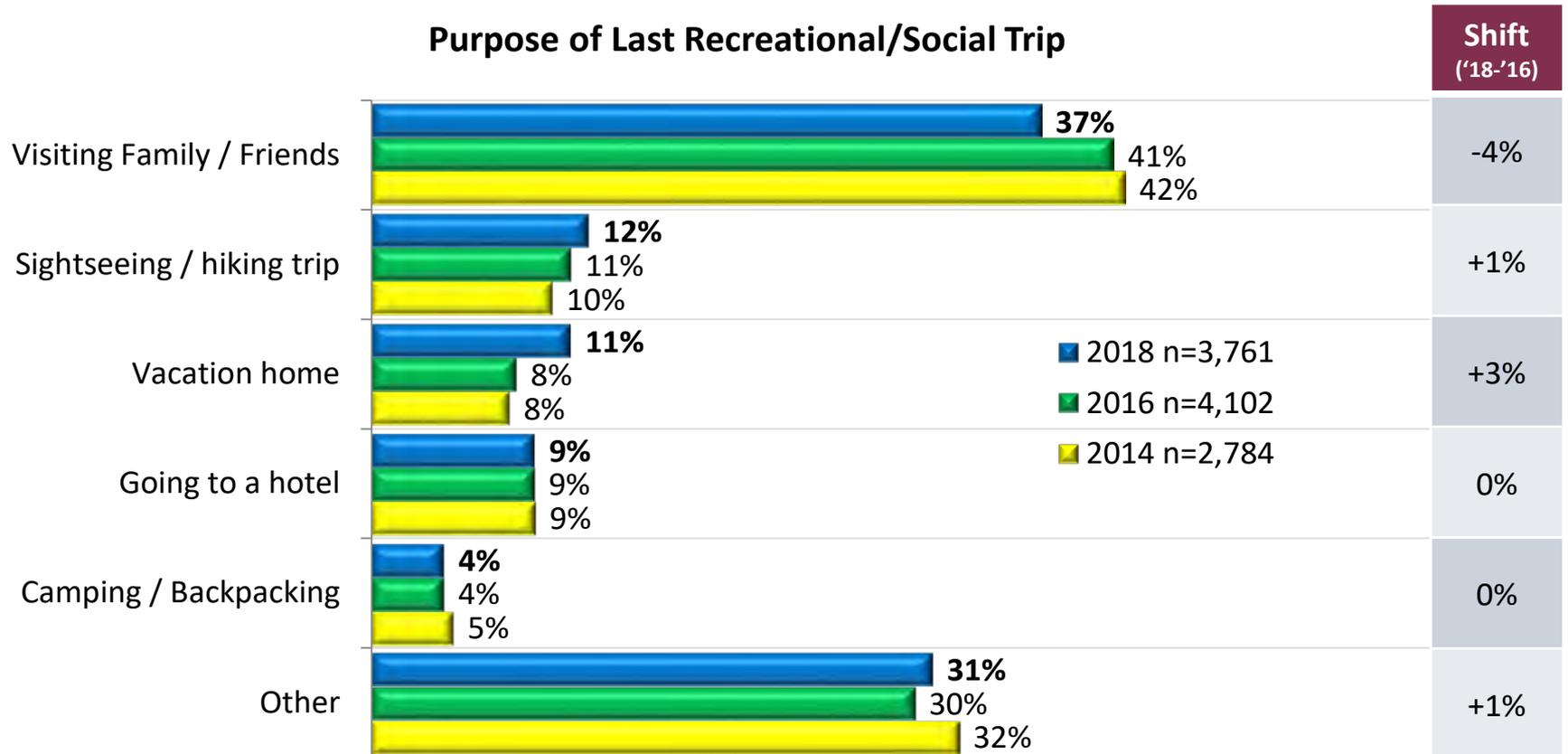
# Recreational Riders

## Recreational/Social Trip Purpose



The plurality of respondents (37%) describe visiting family or friends as the purpose of their last recreational trip in all three studies. Going to your vacation home is highest for recreational riders on the Anacortes/San Juan route (28%) while camping/backpacking is highest for recreational riders on the Coupeville/Port Townsend (13%) route.

**Purpose of Last Recreational/Social Trip**



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

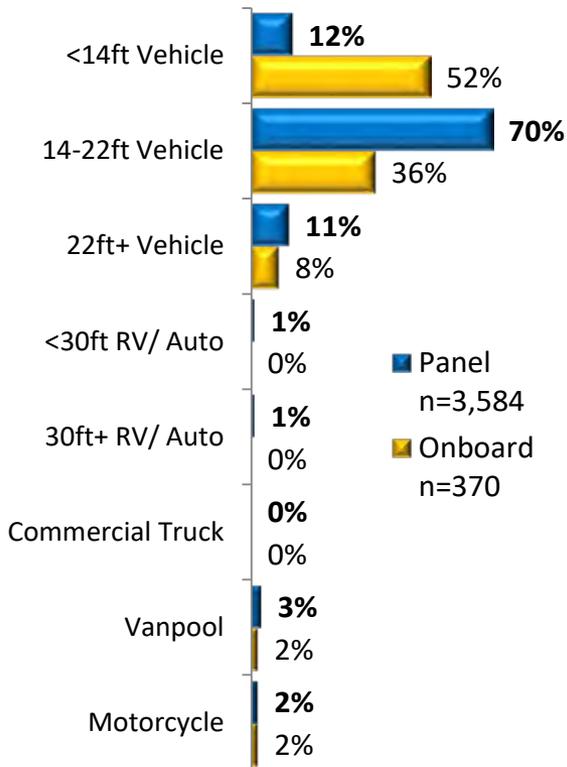
# Recreational Riders

## Vehicle Type Driven On-board

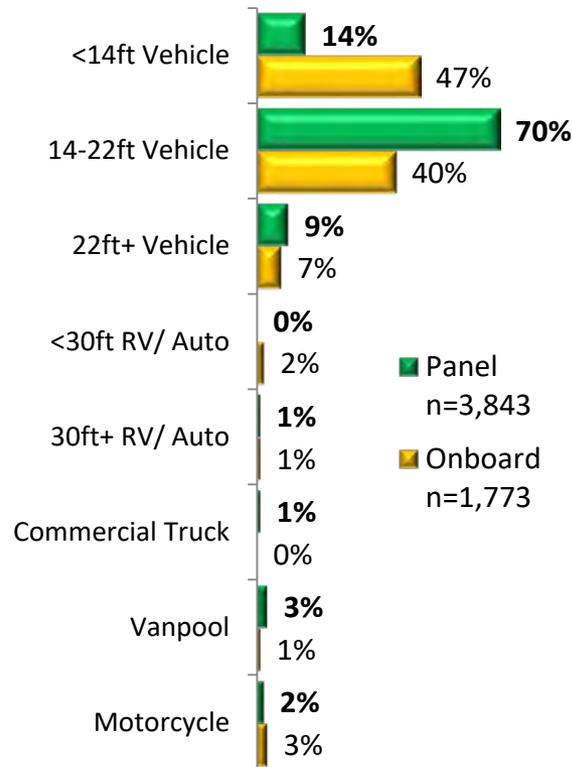


*As in both 2016 (70%) and 2014 (66%), midsized auto/SUV/Pickup (14-22ft) is the dominate vehicle type driven onto the ferry. (note: an explanation for the discrepancy between onboard and panel data may be attributed to the panel getting visual examples of the categories, where as the onboard respondents were not shown the list of vehicles)*

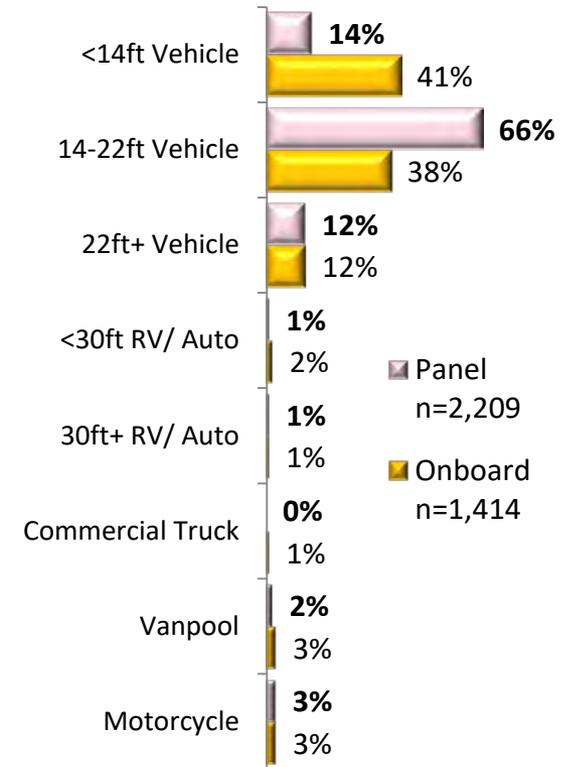
### 2018 Vehicle Type



### 2016 Vehicle Type



### 2014 Vehicle Type



Q35. Which of the following best describes the vehicle you drove on the ferry? (merged with Q6)  
Onboards: Vehicle Type is based on only those non-FROG summer recreational riders.

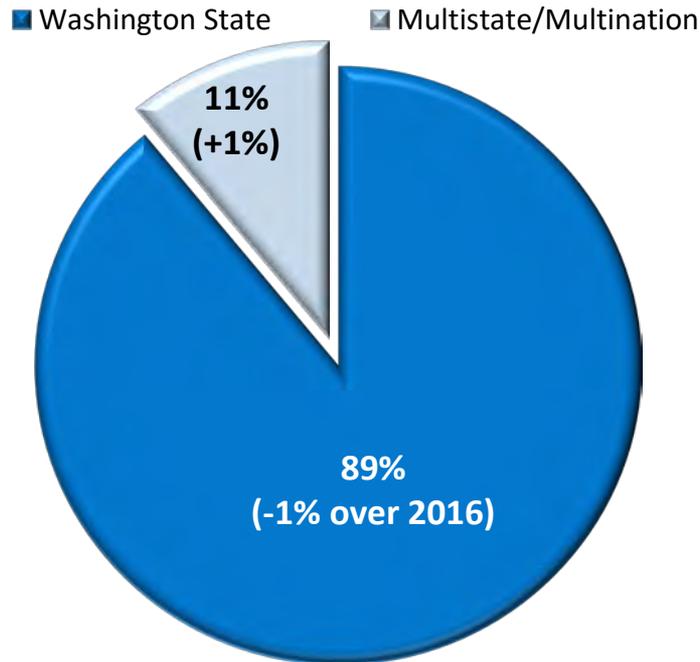
# Recreational Riders

## Destination & Relative Ferry Cost

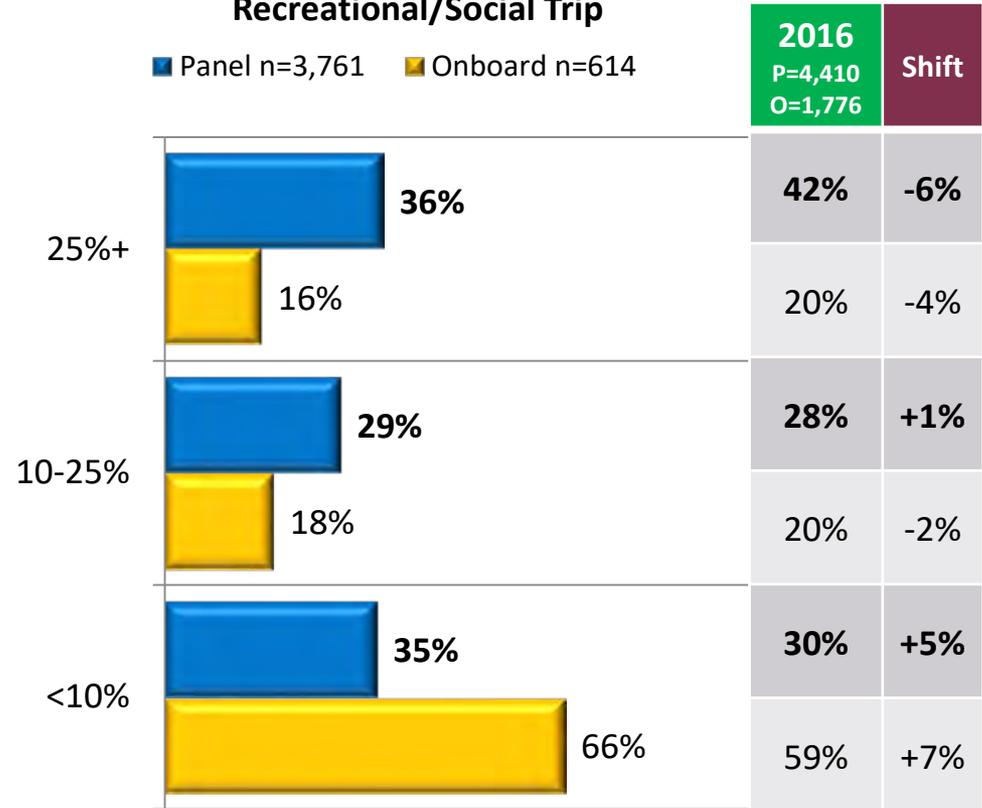


Most respondents say their most recent recreational or social trip was a WA State only trip (did not involve going out-of-state/country). The ferry fare as a percent of total recreational/social trip cost is significantly higher for panel members than for non-FROG respondent (those intercepted on-board). However, the ferry fare as a percentage of the total trip costs has declined since 2016 for both panel members and onboard riders.

**Destination of Last Recreational/Social Trip**  
n=3,761



**Relative Cost of Last Recreational/Social Trip**



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?

# Recreational Riders

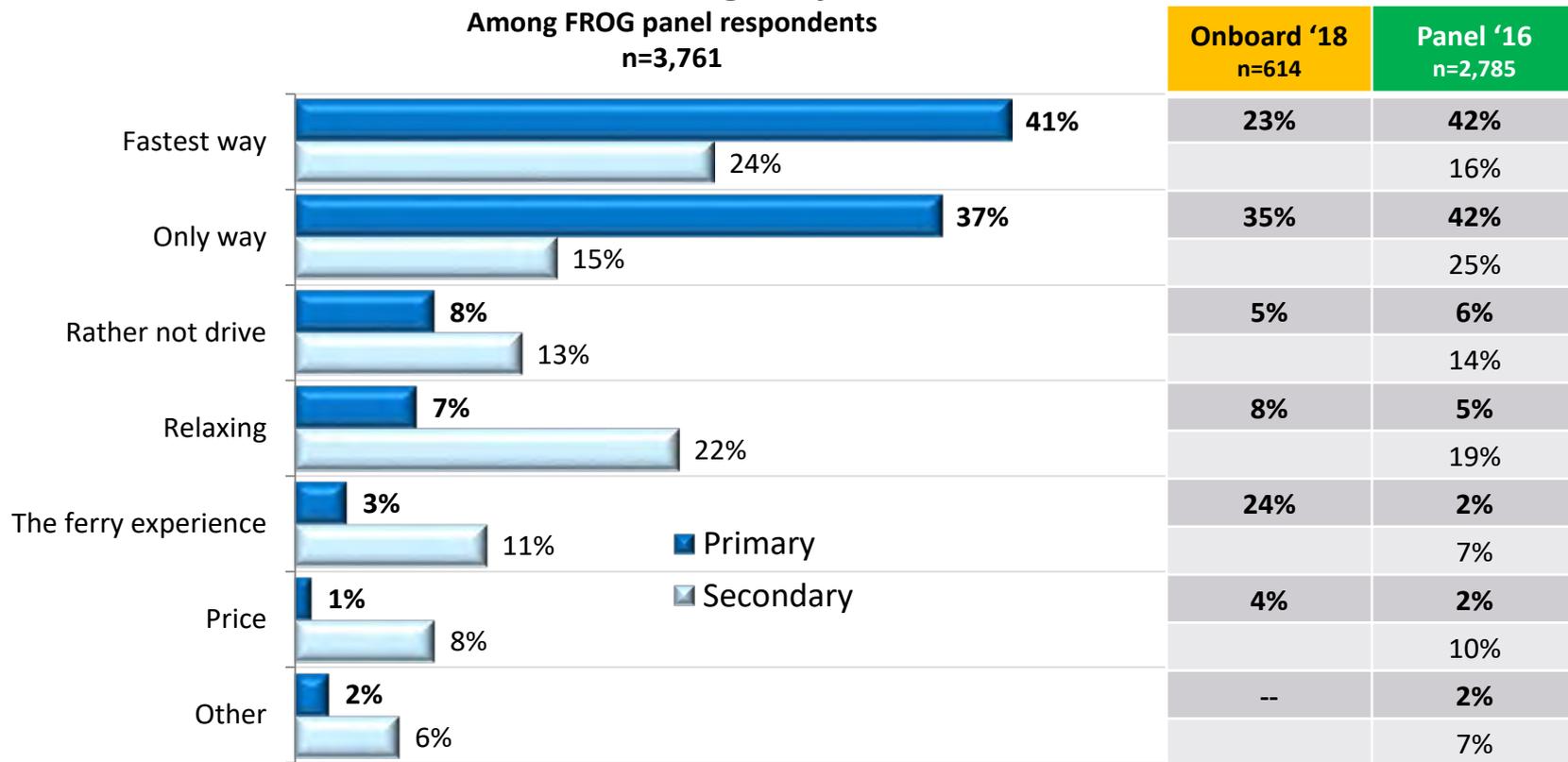
## Factors Driving Ferry Ride Decision



Both panel and onboard respondents say “fastest way” and “only way” are the primary reasons for choosing WSF for their recent recreational or social trip. A secondary reason is it is a “relaxing way to travel.” Onboard respondents also listed the “uniqueness of the ferry experience” as a top reason as well.

### Factors determining ferry travel

Among FROG panel respondents  
n=3,761



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)

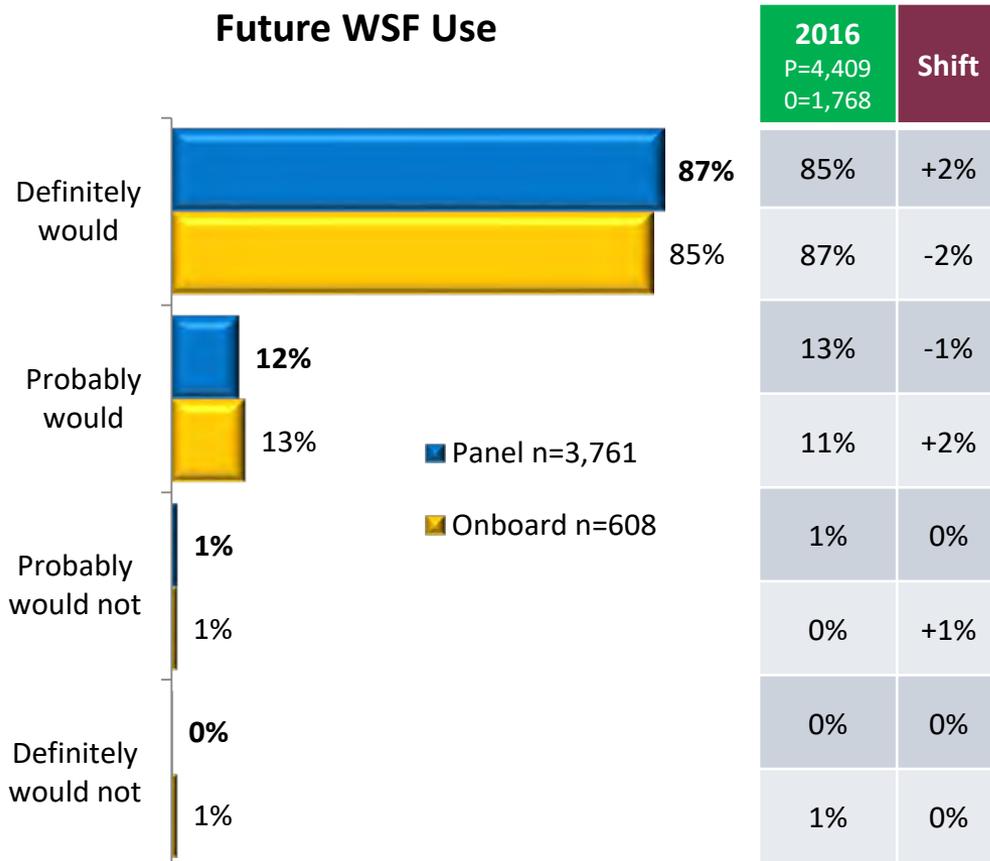
# Recreational Riders

## Future Recreational/Social Use

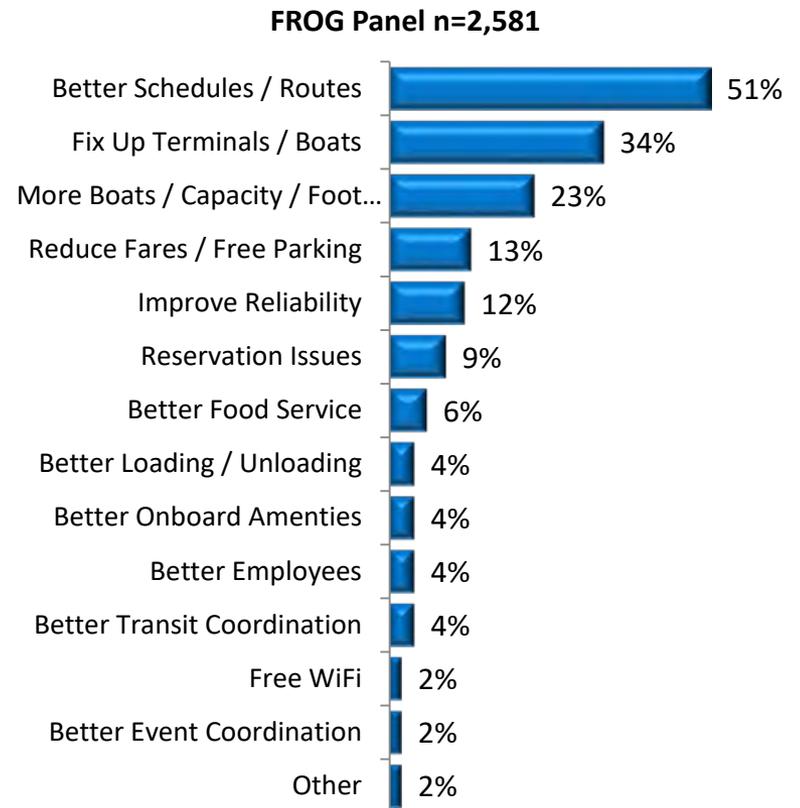


Almost all respondents, both FROG panel (87%) and onboard intercepts (85%) say they are likely to use WSF again for their next recreational or social trip. “Better schedules/routes” (51%) and “fix up terminals/boats” (34%) are the top two mentioned ways to increase the number of recreational or social trips in the future.

### Future WSF Use



### Influencing More Recreational Use



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)



# Summer Performance – Measured by FROG Panel And Occasional Riders



### Contains Information Regarding:

- ❖ Overall Satisfaction & Value
- ❖ Satisfaction by terminal comfort, easy loading/unloading, clear directions, and vessel maintenance
- ❖ Satisfaction with WSF website
- ❖ Satisfaction with WSF phone customer service

### Information Gathered From The Following Surveys:

- ❖ Summer Riders Survey (FROG panel)

### Key Findings

- ❖ *Those dissatisfied with WSF summer performance has increased to 31% from 25% in 2016 with dissatisfaction highest on the San Juan Interisland (45%), Fauntleroy/Vashon (44%) and Point Defiance/Tahlequah (39%) routes.*
- ❖ *Total dissatisfaction remains consistent with 2016 at about 10% for “easy loading / unloading,” “clear directions,” and “well maintained vessels” but has increased sharply to 28% for “terminal comfort.”*
- ❖ *Dissatisfaction with terminal comfort is highest among Seattle/Bainbridge/Bremerton, Anacortes/SJI, and Edmonds/Kingston routes.*
- ❖ *Dissatisfaction with WSF loading crews provide clear directions is highest in Point Defiance/Tahlequah, Fauntleroy/Vashon, and Interisland routes.*
- ❖ *Dissatisfaction with WSF vessels being well maintained and safe centers around general dirty / unclean / odor and bad bathrooms.*

# Summer Performance

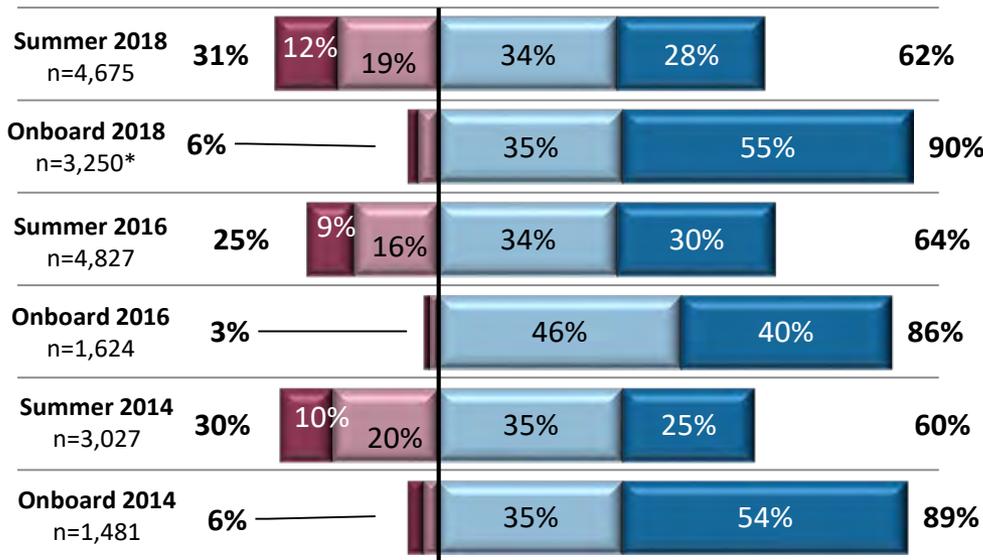
## Overall Satisfaction



The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has slightly declined overall compared to 2016 (62% vs. 64%). Onboard survey respondents are more satisfied by a 28 point margin (90% vs. 82%). Those dissatisfied has increased (from 25% in 2016) to 31% of all summer FROG riders with dissatisfaction highest on the San Juan Interisland (45%), Fauntleroy/Vashon (44%) and Point Defiance/Tahlequah (39%) routes.

### Overall Satisfaction with WSF

Extremely Dissatisfied   Somewhat Dissatisfied   Somewhat 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

\* Onboard 2018 represent all non-FROG intercepted riders

### Overall Dissatisfaction by Route (Total dissatisfied - 2018)

Route	2018 Dissatisfied	2016	Shift
SJII n=61	45%	26%	+19%
FAU/VAS n=366	44%	43%	+1%
PTD/TAH n=99	39%	23%	+16%
ANA/SJI n=1,283	36%	23%	+13%
SEA/BAIN n=873	32%	22%	+10%
FAU/SOU n=188	30%	34%	-4%
MUK/CLI n=683	30%	30%	0%
COU/PTT n=234	27%	19%	+8%
EDM/KIN n=485	25%	24%	+1%
SEA/BREM n=330	23%	23%	0%
SOU/VAS n=32	22%	21%	+1%
ANA/BC n=41	12%	18%	-6%

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

# Summer Performance

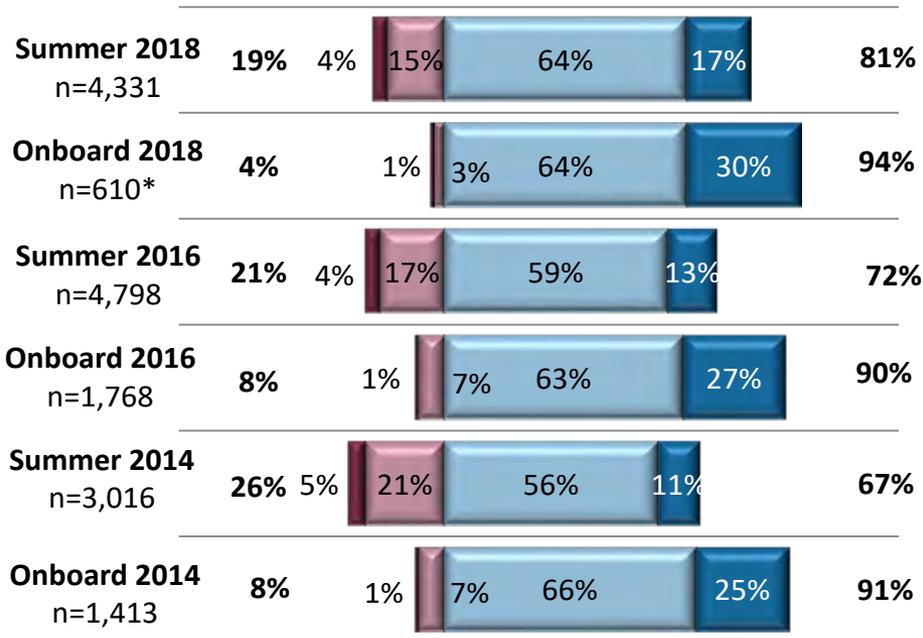
## Overall Value



The percentage of riders saying WSF is a “good” or “very good” value in the 2018 summer period has increased compared to 2016 (81% vs. 72% respectively). Overall good value is up from summer 2016 across all routes except Southworth/Fauntleroy, Fauntleroy/Vashon, and San Juan Interisland. The most significant increases over 2016 were among riders using Seattle/Bremerton and Mukilteo/Clinton routes.

### Overall Perceived Value of WSF

■ Very poor value ■ Poor value ■ Good value ■ Very good value



### Overall ‘Good Value’ by Route (Very good + Good value)

Route	2018	2016	Shift
COU/PTT n=234	92%	83%	+9%
ANA/BC n=41	91%	84%	+7%
SEA/BREM n=330	90%	79%	+11%
MUK/CLI n=682	83%	73%	+10%
FAU/SOU n=188	83%	77%	+6%
SEA/BAIN n=873	83%	74%	+9%
ANA/SJI n=1,282	78%	70%	+8%
EDM/KIN n=484	78%	69%	+9%
PTD/TAH n=99	73%	72%	+1%
SOU/VAS n=32	72%	75%	-3%
SJII n=61	64%	74%	-10%
FAU/VAS n=366	58%	60%	-2%

Only ratings of good or poor are shown, don't know responses are not shown.

The **bold** percentages represent the corresponding total good/poor value

\* Onboard scores represent only those non-FROG recreational riders intercepted

Q26. For the Summer period, do you feel that Washington State Ferries is...?

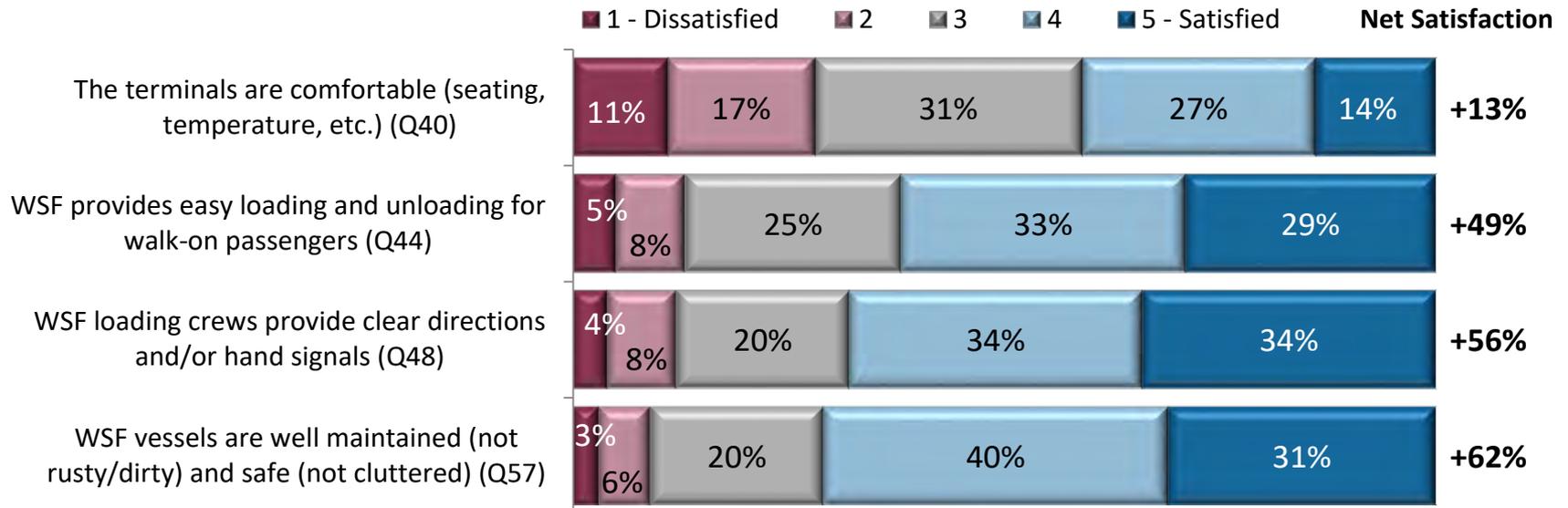
# Summer Performance Satisfaction by Attribute



*Satisfaction across all four attributes remains positive. Total dissatisfaction remains consistent with 2016 at about 10% for “easy loading/unloading,” “clear directions,” and “well maintained vessels” but has increased sharply for “terminal comfort” (12 percentage points greater dissatisfaction – now at 28%).*

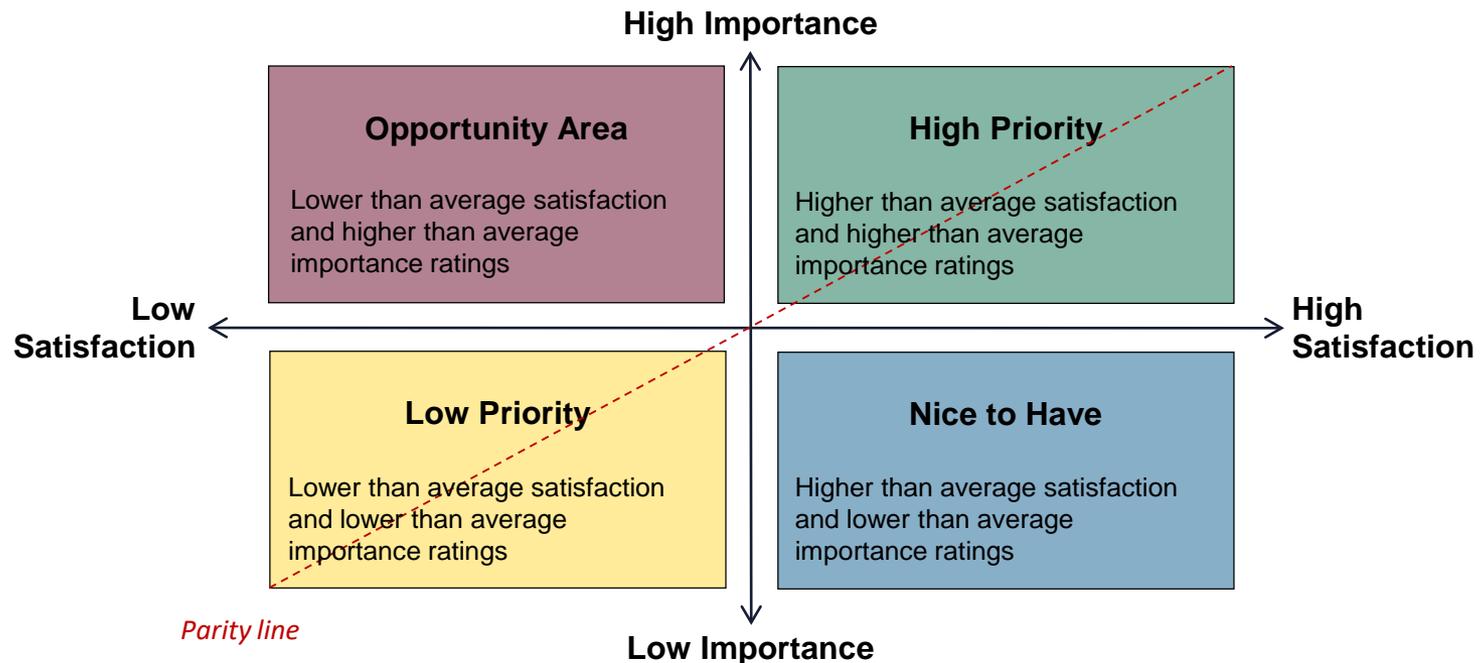
- ❖ The following table presents an overview of the following slides containing the quad chart analysis.
- ❖ The following table shows the total dissatisfaction (1-2) of each individual attribute, relative to the 2016 dissatisfaction.
- ❖ The **Shift** is 2018 dissatisfaction minus 2016 dissatisfaction.

Attributes	Summer Total Dissatisfaction		
	2018	2016	Shift
Terminals are comfortable	28%	16%	+12%
WSF provides easy loading and unloading for walk-ons	13%	14%	-1%
WSF loading crews provide clear directions and/or hand signals	12%	11%	+1%
WSF Vessels are well maintained and safe	9%	11%	-2%





- ❖ The following slides present quadrant charts outlining the relative importance of each ferry attribute and the relative satisfaction of each attribute.
- ❖ 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.



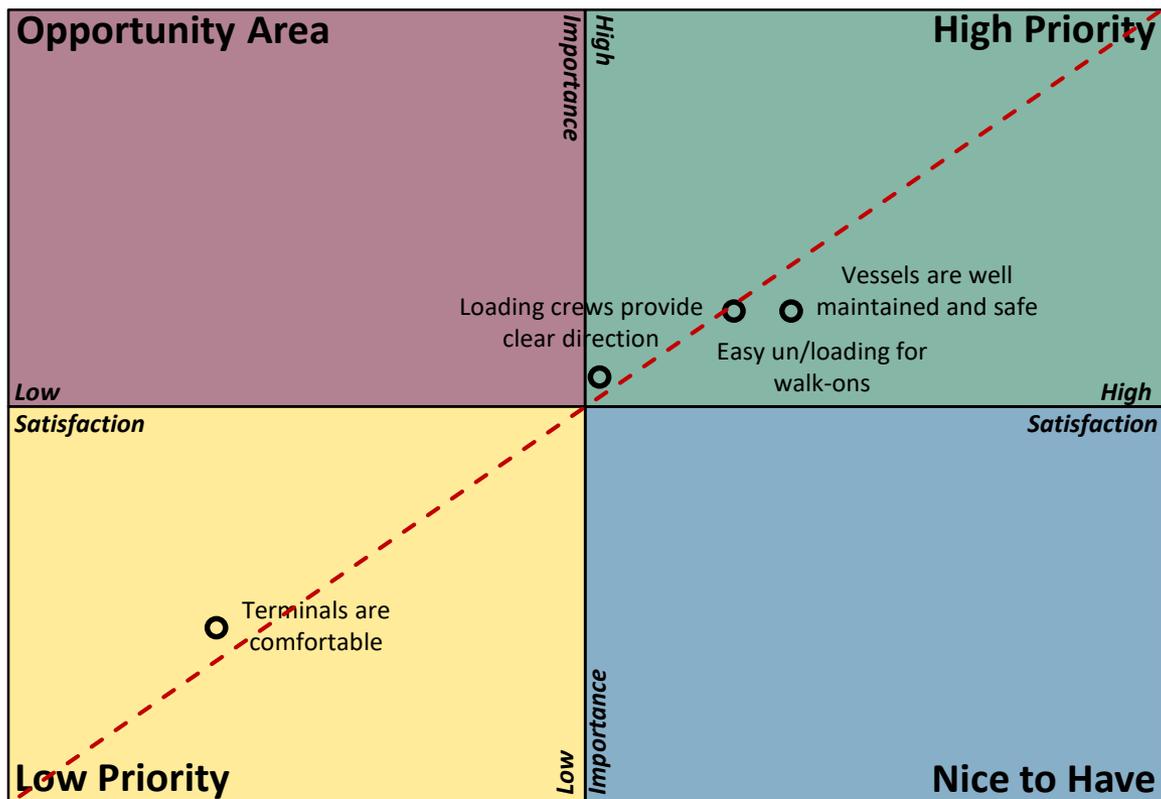
# Summer Performance

## Gap Analysis: Overall - 2018



Systemwide, all four attributes tested have approximately equal levels of satisfaction with their corresponding level of importance. While there are no opportunity areas systemwide, the most notable change is the lower satisfaction with “terminals are comfortable” between 2018 and 2016.

**Satisfaction vs. Importance Ratings (n=2808-4410)**

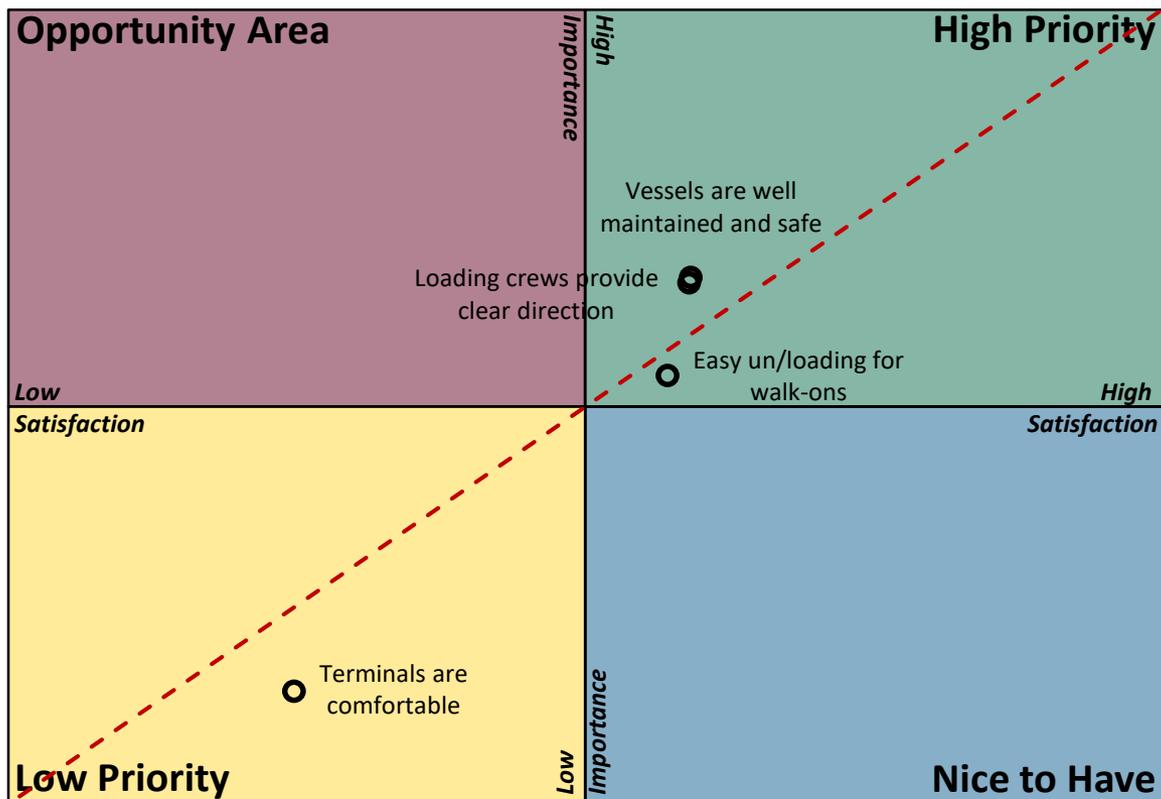


# Summer Performance Gap Analysis: Overall - 2016



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 2016 summer respondents.

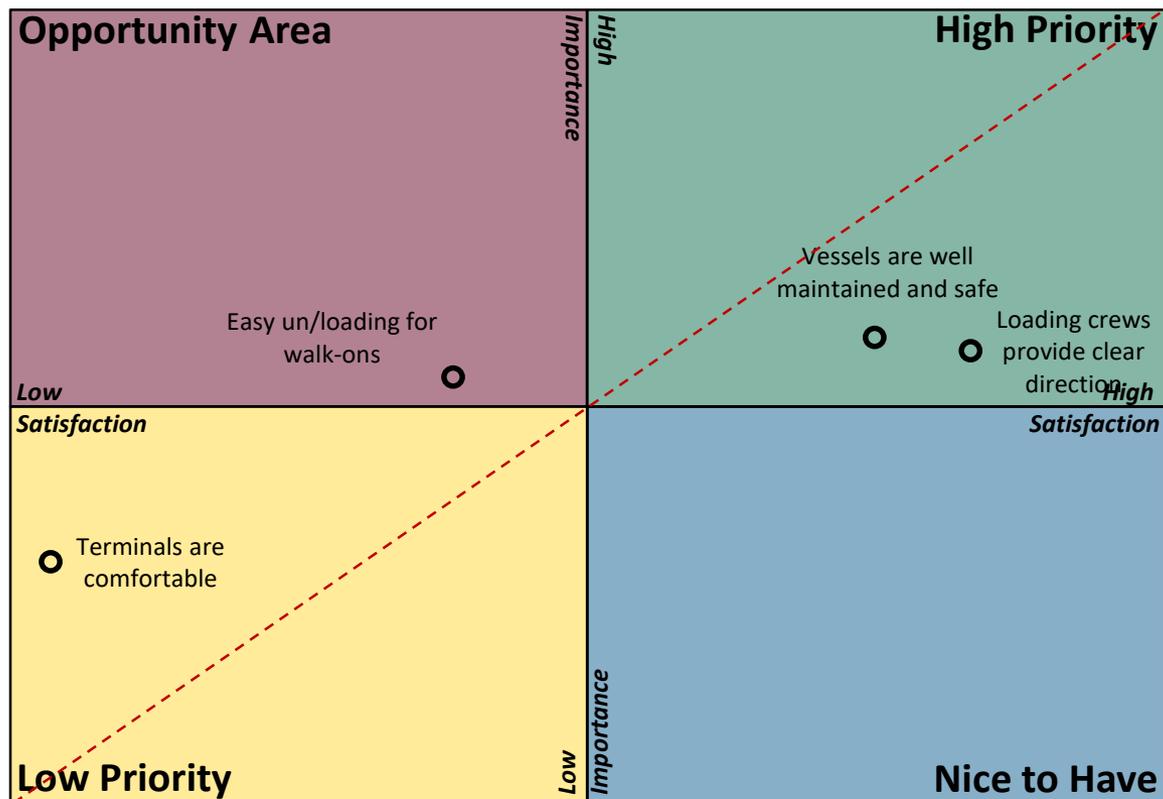
Satisfaction vs. Importance Ratings (n=2620 - 4535)





Among Seattle/Bainbridge riders, “easy loading and unloading for walk-on’s” and “terminals are comfortable” are the greatest area for improvement (furthest to the left of the red parity line) for summer riders.

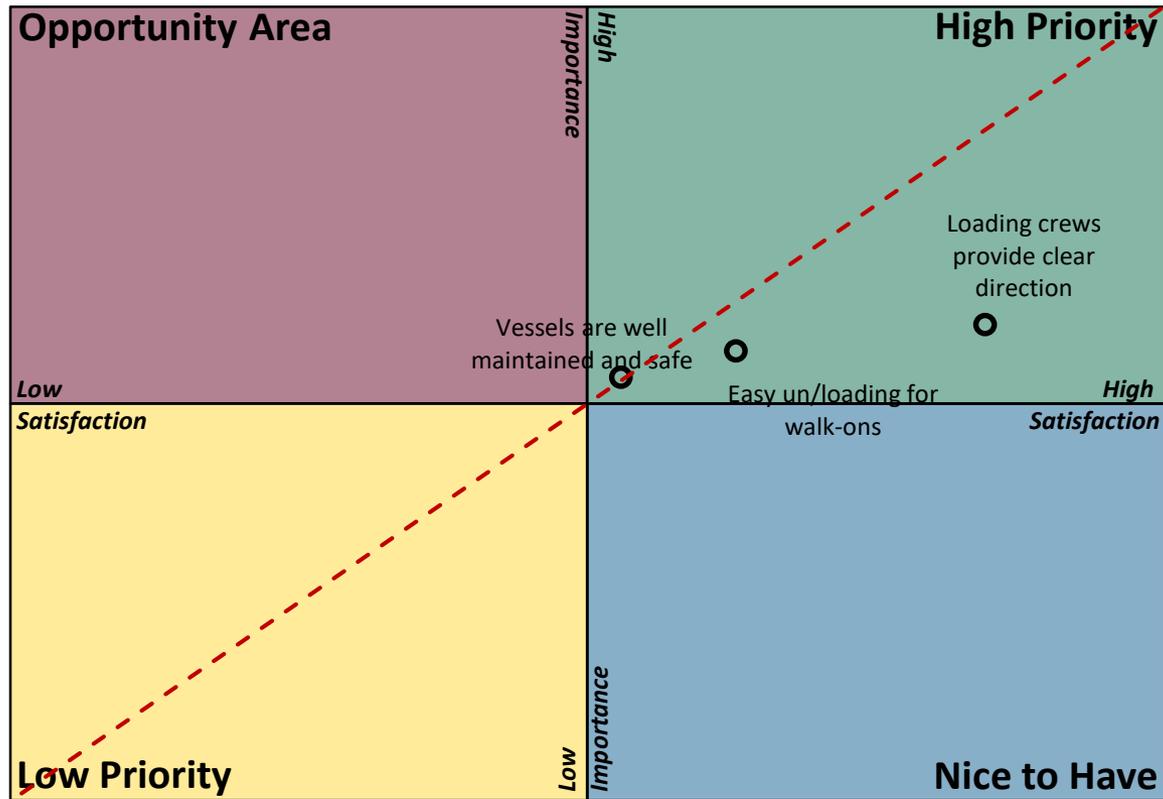
Satisfaction vs. Importance Ratings (n=741-831)





Among Seattle/ Bremerton riders, satisfaction with the “terminals are comfortable” attribute is considerably low and is the greatest area of opportunity for improving Seattle/Bremerton riders overall satisfaction.

**Satisfaction vs. Importance Ratings (n=258-314)**



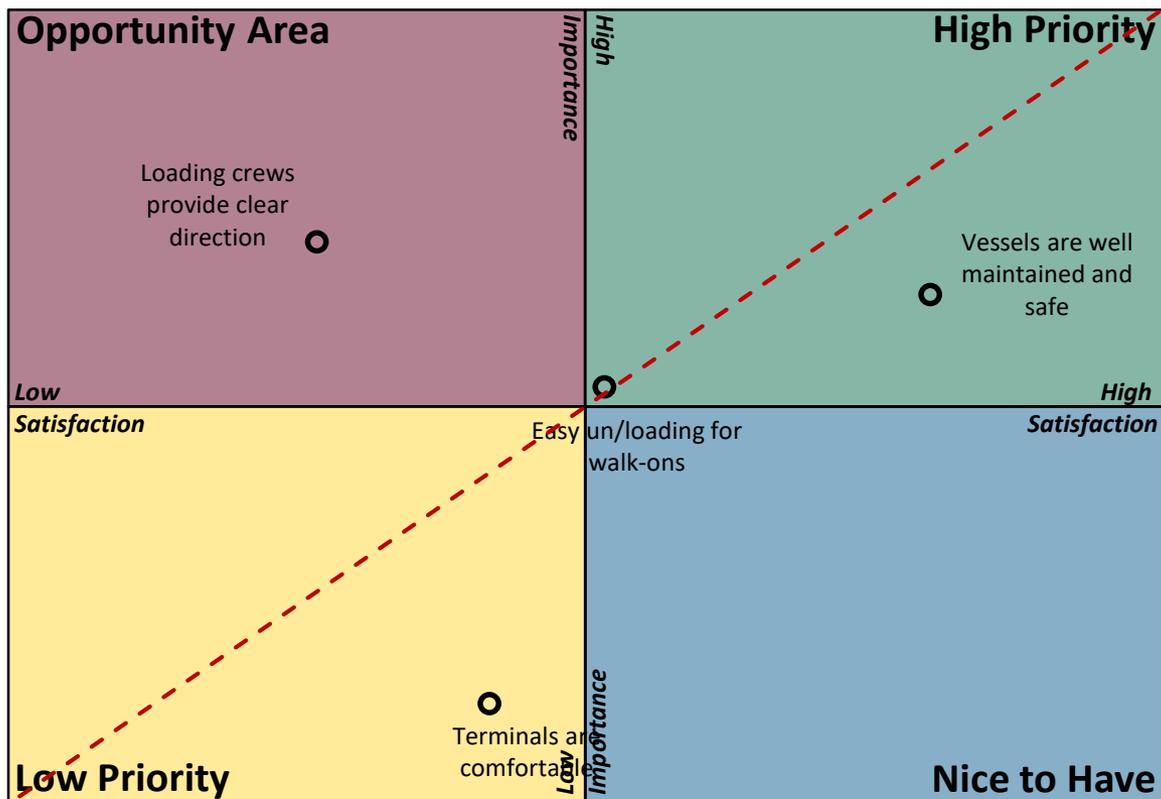
○ Terminals are Comfortable\*

\* Satisfaction scores outside of graph area



*“Loading crews providing clear directions” is the greatest opportunity for improving overall satisfaction in both 2018 and 2016 for Point Defiance/Tahlequah summer riders.*

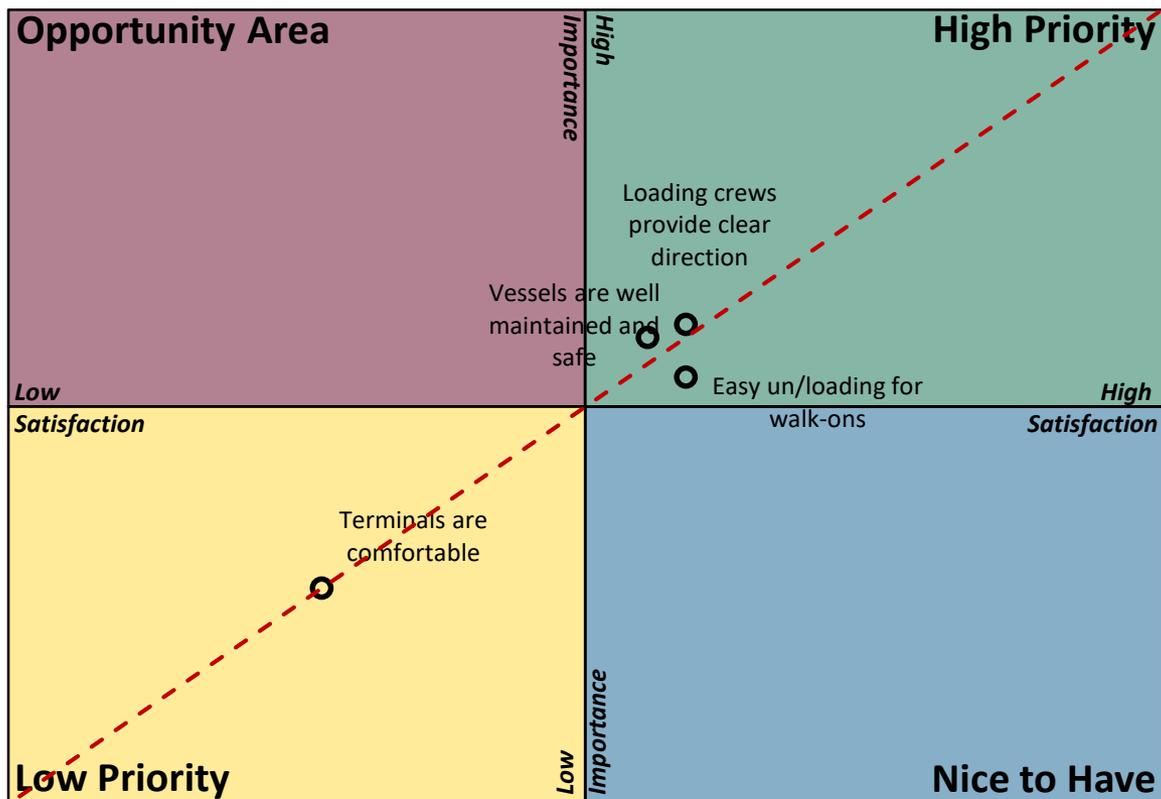
**Satisfaction vs. Importance Ratings (n=66-144)**





The 2018 summer study found that all four attributes tested are in balance with their satisfaction scores approximately equal to their corresponding importance scores for summer riders.

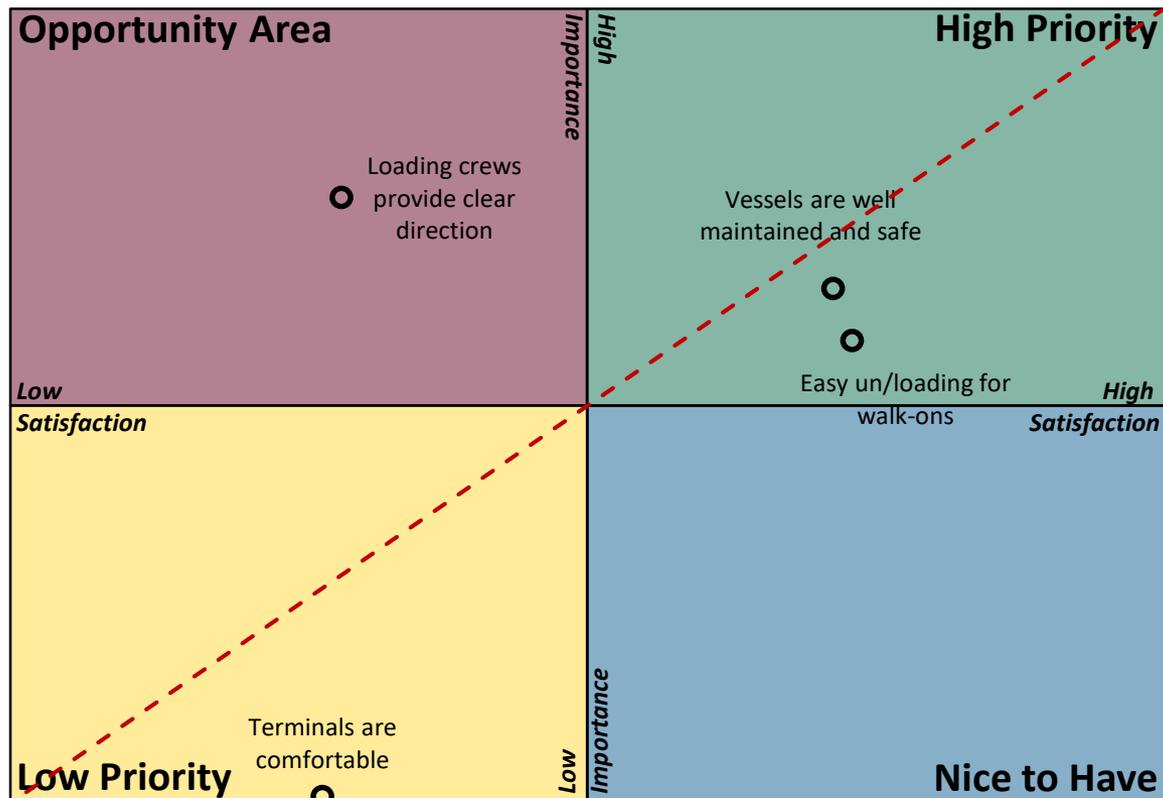
Satisfaction vs. Importance Ratings (n=291-458)





Improvements in “loading crews providing clear directions” in both 2018 and 2016 is by far the top opportunity for improving overall satisfaction according to Fauntleroy/Vashon summer riders.

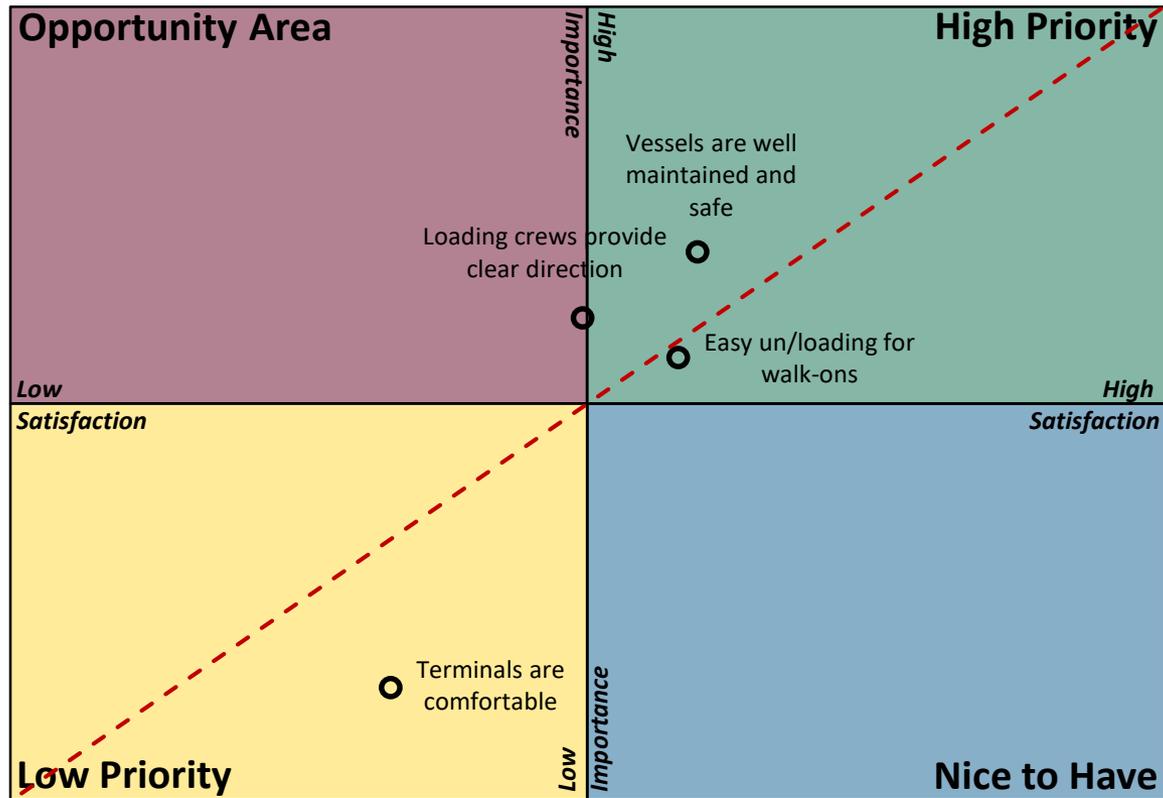
Satisfaction vs. Importance Ratings (n=232-359)





For Fautleroy/Southworth summer riders, both “loading crews providing clear directions” (in both 2018 and 2016) and “vessels are well maintained and safe” (2018) are the top two opportunity areas to look into for overall performance improvement.

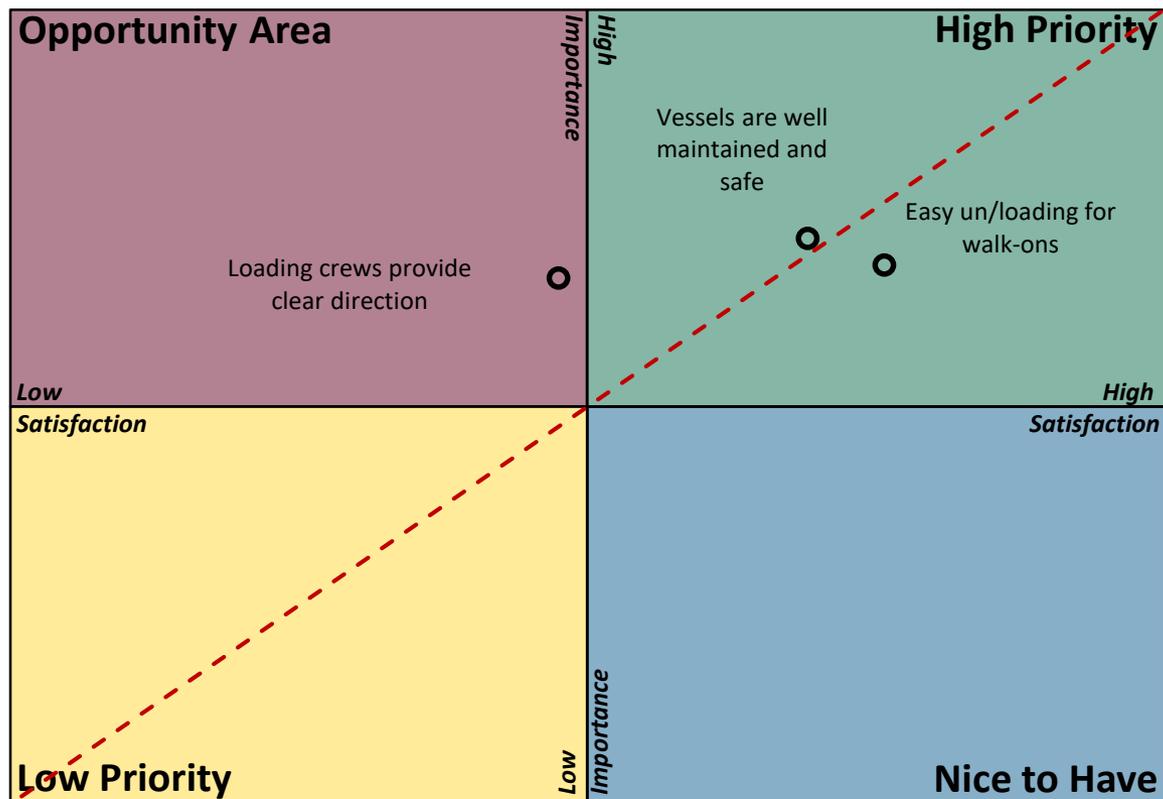
**Satisfaction vs. Importance Ratings (n=108-183)**





Southworth/Vashon summer riders' top opportunity area for improvement is "loading crews provide clear directions" (in both 2018 and 2016) and to a lesser extent "terminals are comfortable."

**Satisfaction vs. Importance Ratings (n=25-31)**



○

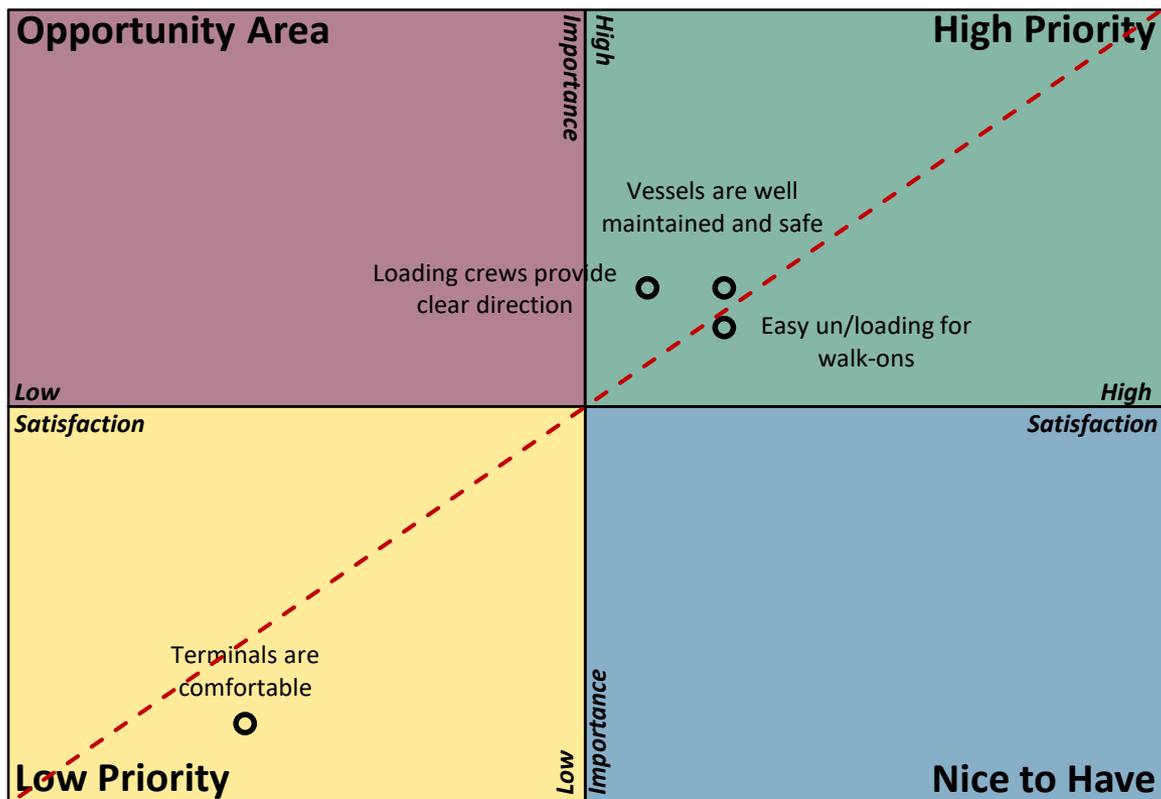
Terminals are Comfortable\*

\* Satisfaction scores outside of graph area



For the most part performance is equal to importance for the four attributes tested in Coupeville/Pt. Townsend. However, “loading crews providing clear directions” is the greatest opportunity area for improvement reported by Coupeville/Pt. Townsend summer riders in both 2018 and 2016.

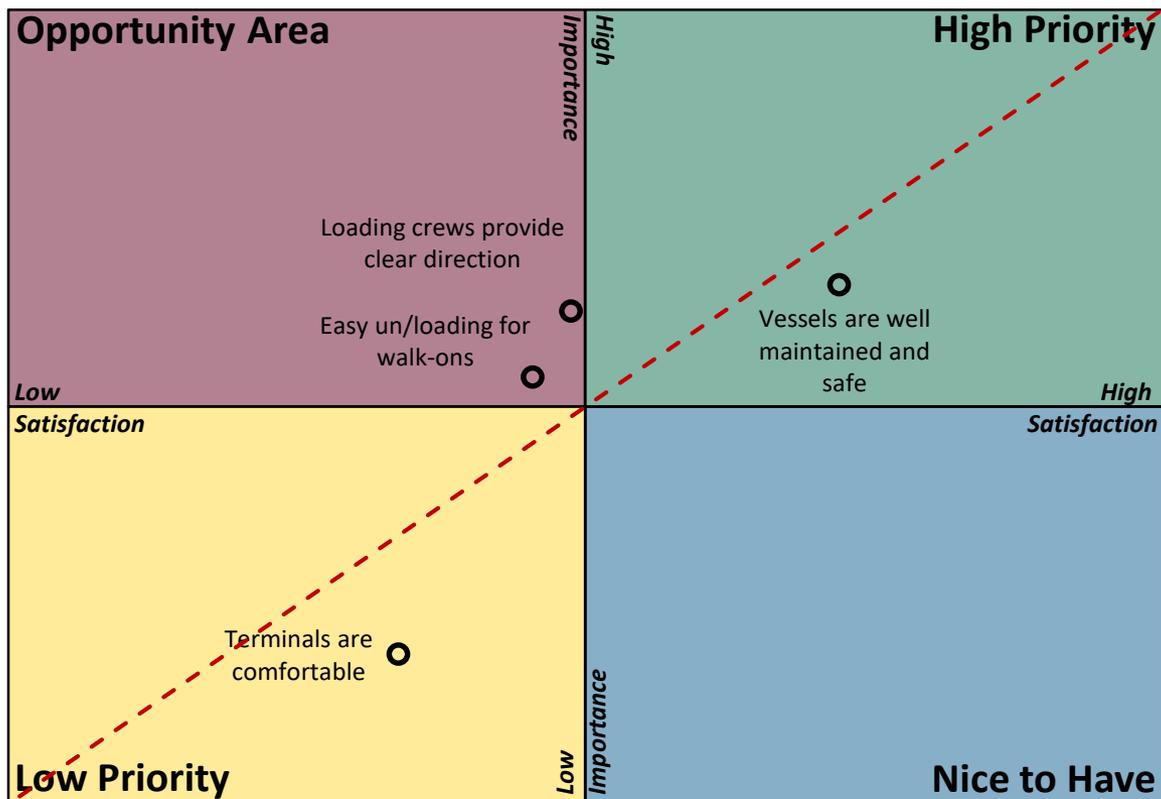
**Satisfaction vs. Importance Ratings (n=112-222)**





For Mukilteo/Clinton summer riders, “loading crews providing clear directions” and “easy loading and unloading for walk-ons” continue to be the top two opportunity areas. However, there appears to be improvements in both attributes since 2016.

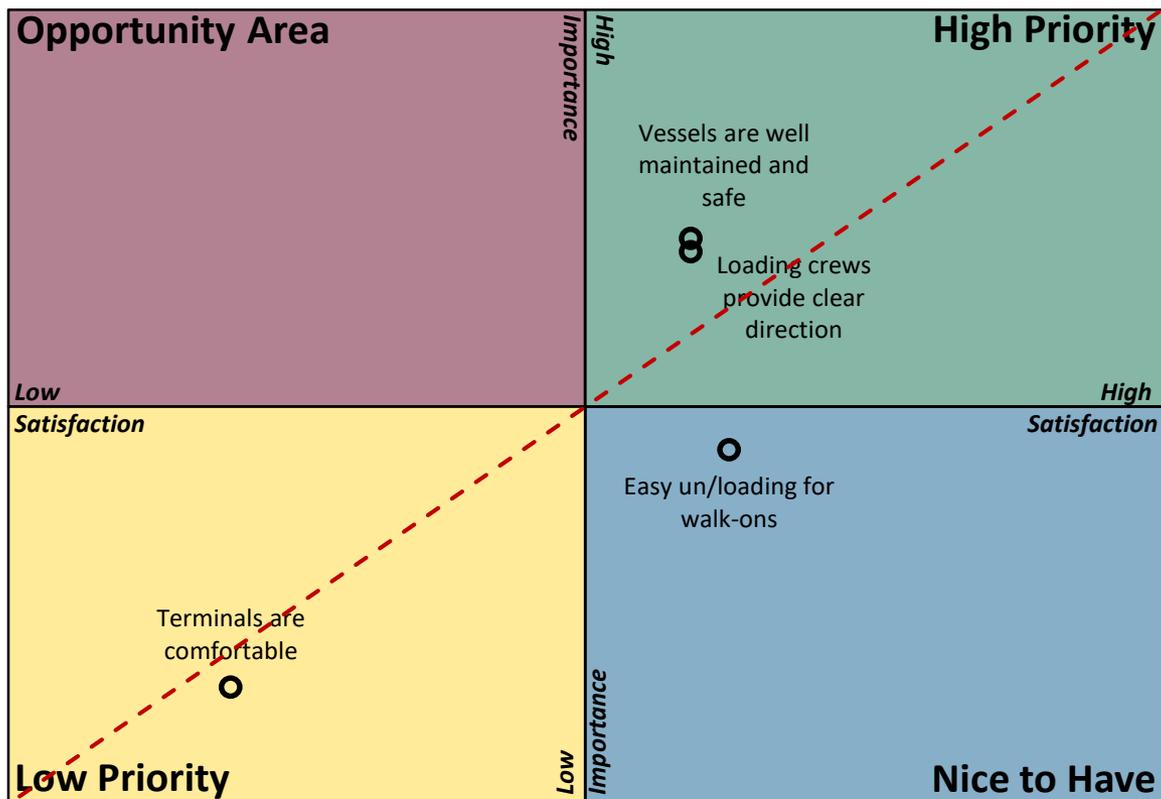
**Satisfaction vs. Importance Ratings (n=395-709)**





For Anacortes/San Juan Island summer riders “vessels that are well maintained and safe” and “loading crews providing clear directions” are still two areas for performance improvements in both 2018 and 2016.

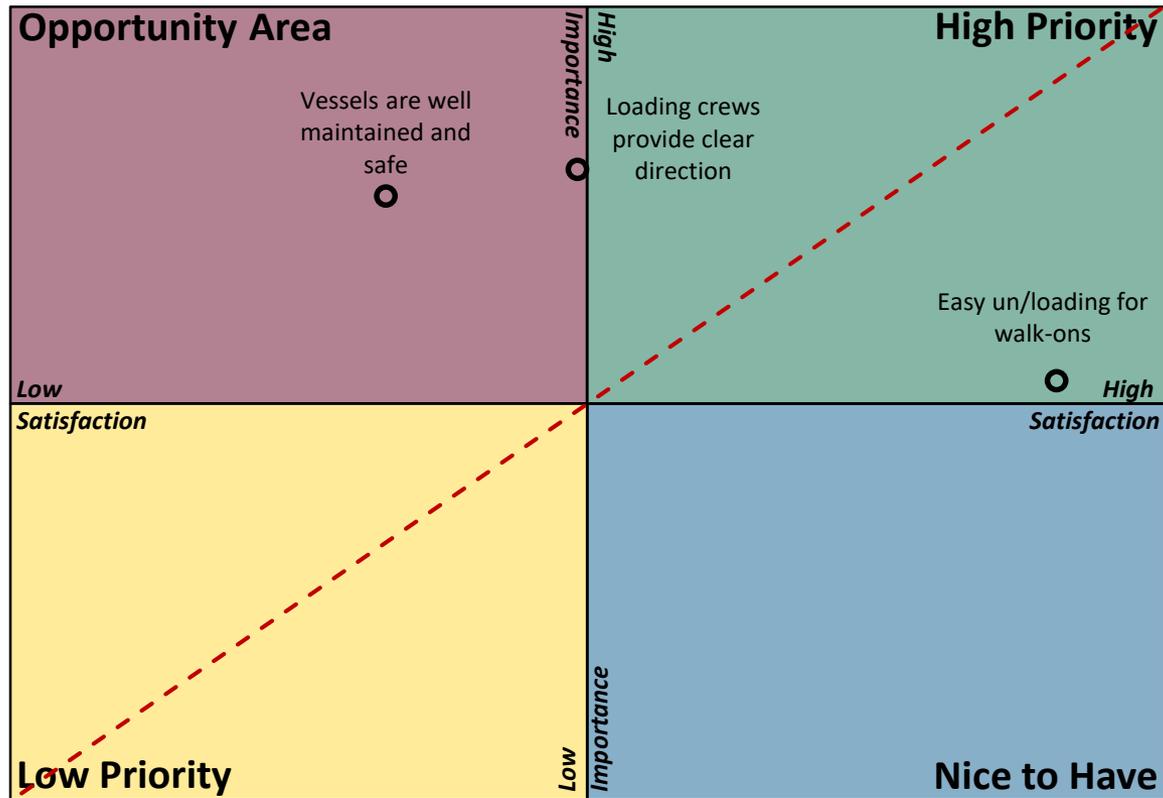
**Satisfaction vs. Importance Ratings (n=523-1239)**





For San Juan Interisland summer riders, keeping “vessels well maintained and safe” along with “loading crews providing clear directions” are the two high priority areas for service improvements in 2018.

Satisfaction vs. Importance Ratings (n=30-60)



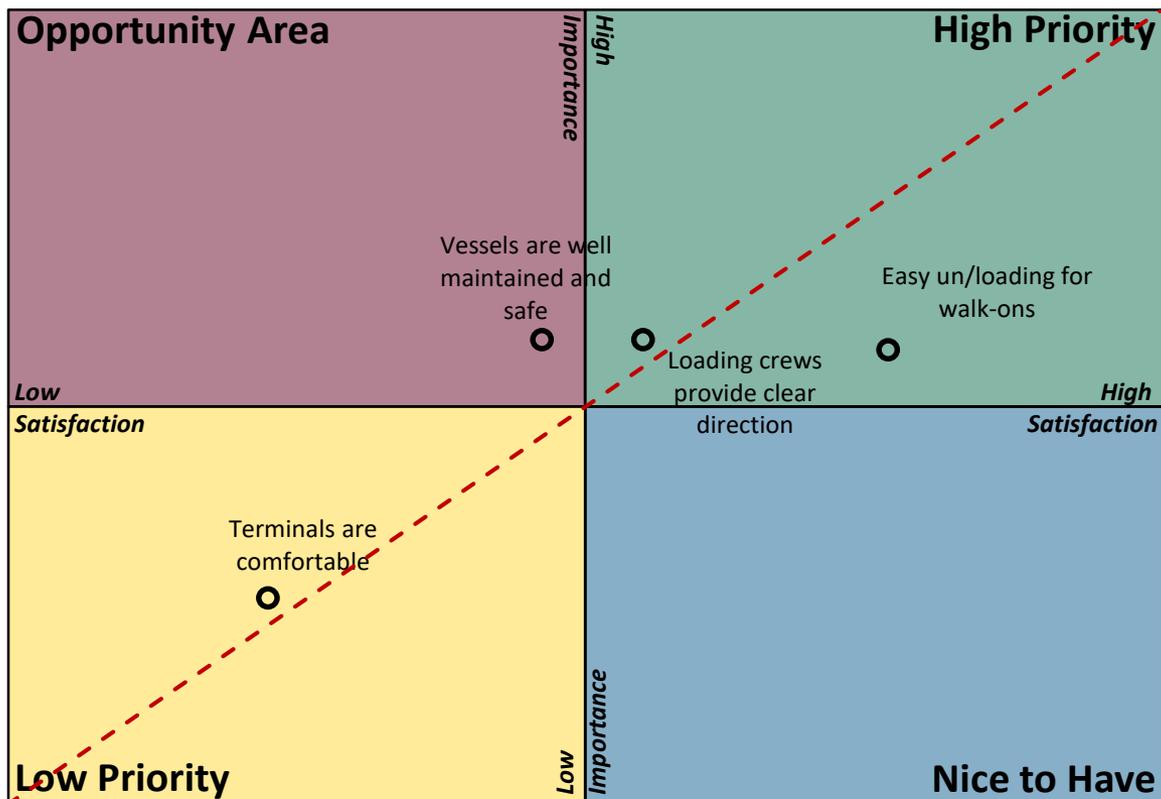
○  
Terminals are  
Comfortable\*

\* Satisfaction scores outside of graph area



For 2018 summer Anacortes/Sidney BC riders “vessels are well maintained and safe” is the greatest area for improvement.

Satisfaction vs. Importance Ratings (n=18-40)





- ❖ The proceeding slides present an overview of each Ferry attribute individually and include the following:
  - The percentage providing top ratings (5 + 4) on a 5-point scale for importance and satisfaction for each of the ferry attributes, by route.
  - The percentage providing bottom ratings (1 + 2) on a 5-point scale for satisfaction for each of the ferry attributes, by route.
  - Randomly selected verbatim responses specify what made riders dissatisfied
  - 2016 Summer Ferry Comparison data for bottom ratings (1 + 2) on a 5-point scale for satisfaction for each of the ferry attributes, by route.

# Summer Performance

## Terminals are Comfortable



*Dissatisfaction with terminal comfort is highest among Seattle/Bainbridge (48%), Seattle/Bremerton (44%), Anacortes/SJI (25%), and Edmonds/Kingston (20%) routes. The dissatisfaction is greatest among the Seattle terminal users.*

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		3,306	767	270	67	313	278	139	27	185	425	768	38	29
Terminals are comfortable (2018)	Imp. (4-5)	69%	77%	76%	58%	71%	50%	64%	52%	61%	67%	61%	39%	74%
	Sat. (4-5)	41%	27%	23%	59%	50%	48%	55%	47%	60%	60%	39%	44%	57%
	Dissat. (1-2)	28%	48%	44%	5%	20%	12%	12%	9%	10%	10%	25%	13%	12%
<b>2016</b>	Dissat.	16%	24%	25%	9%	9%	8%	4%	4%	6%	7%	24%	5%	14%
<b>Change</b>	Dissat.	+12%	+24%	+19%	-4%	+11%	+4%	+8%	+5%	+4%	+3%	+1%	+8%	-2%

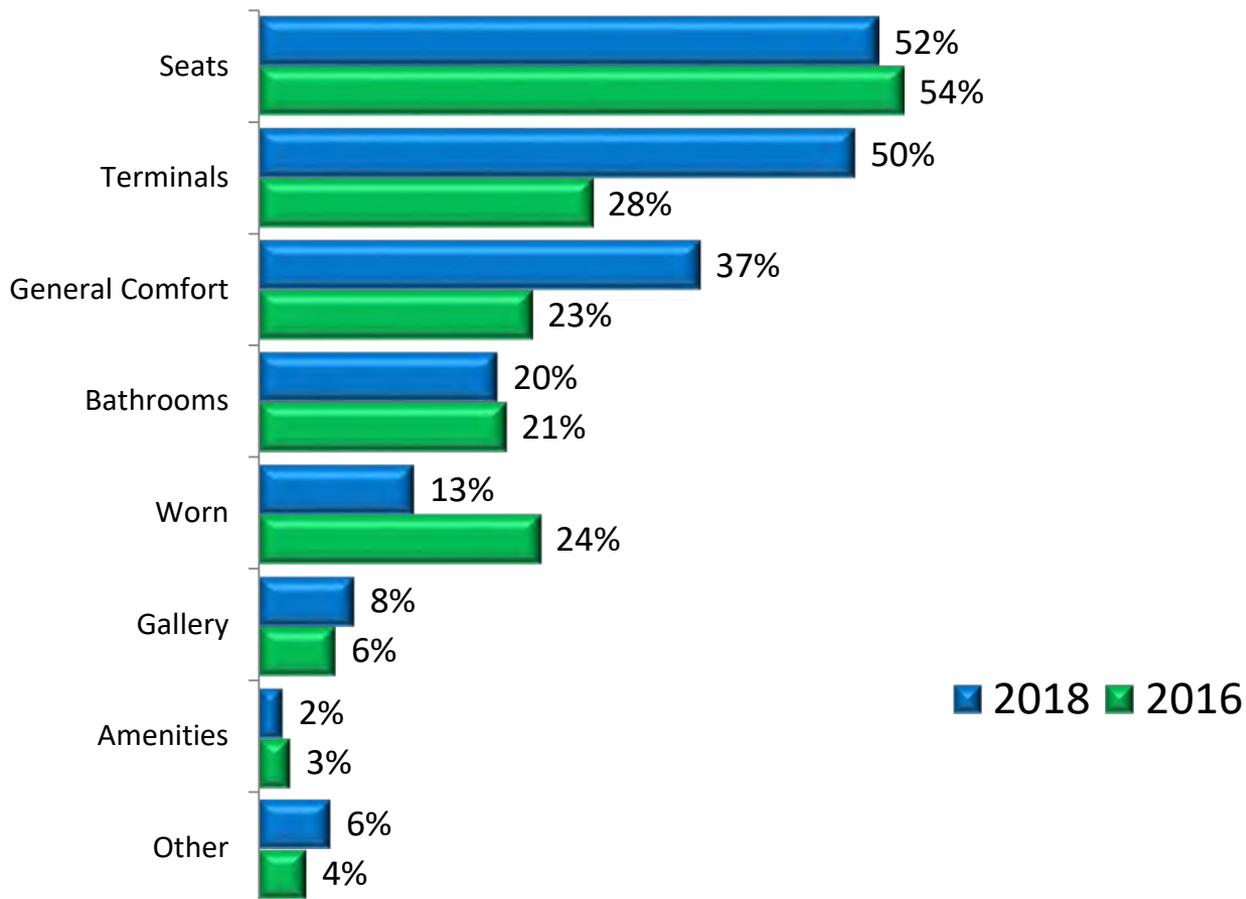
Top 3 Unsatisfactory Terminals	
Seattle	77%
Bainbridge	9%
Anacortes	9%

Example of Verbatim Complaints	
Seattle	#1 There is not enough seating and it's uncomfortable. #2 The women's bathroom is disgusting. The doors are cut so low that it is humiliating to use the toilet. There are no toilet seat covers and no paper towels.
Seattle	As an elderly passenger the horrible terminal conditions mortify me. Lack of seating is torture.
Seattle	Construction makes the terminal crowded and has no seating. People who do not usually ride the ferry have no idea what they are doing and just stand around in the way.
Seattle	Line for Bainbridge inside terminal was hot with small fans and tight lines, no place to sit, announcer telling people to cram forward. Awful. Feels like a third world terminal now.
Seattle	The terminal is a zoo; there is not enough seating or standing area; the bathrooms are awful; there are not enough retail facilities.
Seattle	Workers are rude and inconsistent. Restrooms are dirty and terminal is either hot with fans not running or cold with fans not running too often.
Anacortes	Hard seats are very uncomfortable and terminal is unkempt, bathrooms are often dirty.
Anacortes	The terminal just like the ferries themselves are shabby and run-down. The food and refreshment options are abhorrent. The bathrooms are disgusting and the customer service is non-existent at best.

# Summer Performance Terminal Issues Mentioned



*Seating (52%) is the top complaint among people who are dissatisfied with terminal comfort. More over, negative comments about general terminal conditions (50%) has almost doubled since 2016 (when it was 28%).*



Q42b. What specific conditions (about the terminal) made you dissatisfied? (Multiple Response, n=781)

# Summer Performance

## WSF provides easy loading and unloading for walk-ons



*Dissatisfaction is highest for Seattle/Bainbridge (23%), Seattle/Bremerton (14%), and Fauntleroy/Southworth (14%) routes.*

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		2,808	750	258	66	291	232	108	25	112	395	523	30	18
WSF provides easy loading and unloading for walk-ons (2018)	Imp. (4-5)	<b>88%</b>	91%	90%	82%	87%	85%	89%	96%	91%	88%	79%	76%	99%
	Sat. (4-5)	<b>61%</b>	48%	55%	65%	69%	76%	70%	88%	85%	67%	65%	82%	100%
	Dissat. (1-2)	<b>13%</b>	23%	14%	2%	9%	7%	14%	3%	4%	11%	5%	2%	0%
<b>2016</b>	Dissat.	<b>14%</b>	21%	16%	10%	6%	7%	10%	0%	5%	15%	8%	5%	4%
<b>Change</b>	Dissat.	<b>-1%</b>	<b>+2%</b>	-2%	-8%	<b>+3</b>	0%	<b>+4%</b>	<b>+3%</b>	-1%	-4%	-3%	-3%	-4%

Top 3 Unsatisfactory Terminals	
Seattle	69%
Bainbridge	18%
Bremerton	9%

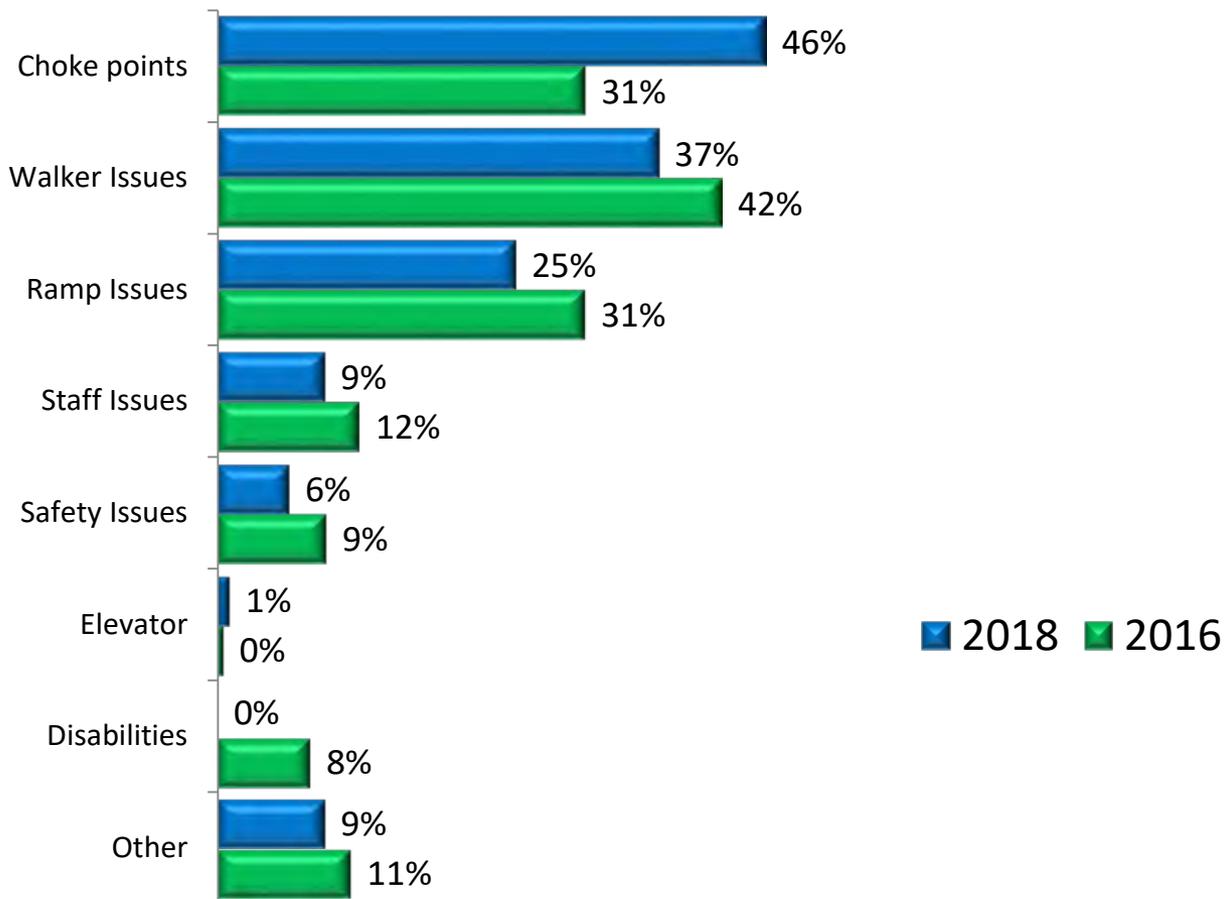
Example of Verbatim Complaints	
Seattle	I feel like a trapped rat looking for cheese as we meander through the hallways or stand crammed into the space with few seats, waiting for habitually late boats....
Seattle	Late ferries, narrowing of the line, and taking too long. Walk on passengers should load once the main cabin is clear and swept. We should not wait for cars to unload.
Seattle	The 2 lanes for Bremerton and Bainbridge are very confusing and we don't get enough turnstiles to load because sometimes we load at the same time.
Seattle	We were told that everybody would make it on, but frequently last call was made before even half the terminal was even loaded. All this does is create individuals to push.
Seattle, Bainbridge	It takes forever to unload at either end. Seriously, it's the worst!!! It takes nearly as long as the ride itself. This could be easily fixed with a dual sided exit set up.
Seattle, Bremerton	In Bremerton, you can't get close to being dropped off unless you have a handicap sign. In Seattle, with all of the construction at the terminal and the viaduct it's a mess and constantly changing.
Southworth	It would be nice to let the passengers waiting in the rain, weather, to load multiple times. Or at least build a shelter area for all the people to stand.

# Summer Performance

## Walk on Issues Mentioned



*The loading and unloading of walk on passengers through choke points (46%) is the top complaint among people who are dissatisfied, followed by complaints about general walk-on issues (37%).*



Q46c. What specific (walk on) conditions made you dissatisfied? (Multiple Response, n=335)

# Summer Performance

## WSF loading crews provide clear directions / hand signals



*Dissatisfaction with WSF loading crews provide clear directions is highest in Point Defiance/Tahlequah (24%), Fautleroy/Vashon (20%), and Interisland (25%) routes.*

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		4,344	741	262	98	458	359	171	28	219	670	1,239	60	39
WSF loading crews provide clear directions / hand signals (2018)	Imp. (4-5)	93%	93%	94%	93%	90%	96%	97%	95%	94%	93%	94%	92%	100%
	Sat. (4-5)	68%	75%	74%	50%	67%	49%	71%	71%	81%	69%	63%	57%	83%
	Dissat. (1-2)	12%	10%	7%	24%	9%	20%	11%	16%	7%	12%	17%	25%	14%
<b>2016</b>	Dissat.	11%	9%	8%	20%	8%	17%	15%	6%	9%	14%	13%	22%	2%
<b>Change</b>	Dissat.	+1%	+1%	-1%	+4%	+1%	+3%	-4%	+10%	-2%	-2%	+4%	+3%	+12%

Top 3 Unsatisfactory Terminals	
Seattle	25%
Fautleroy	21%
Mukilteo	17%

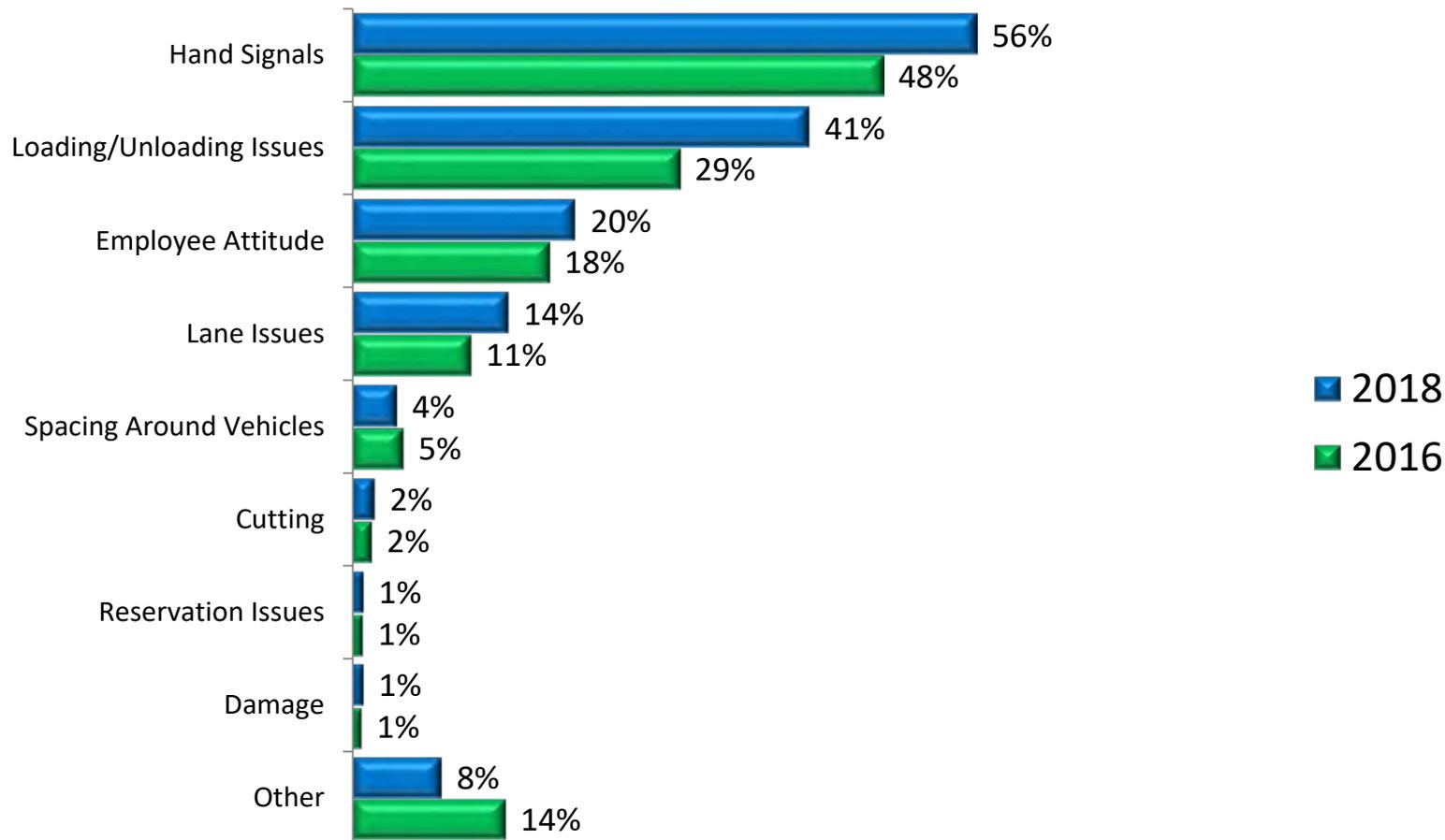
Example of Verbatim Complaints	
<b>Fautleroy</b>	2 deck hands each pointing a different direction
<b>Fautleroy</b>	3 people on the deck, but no two people used the same methods of direction. When driver stopped to clarify, they were yelled at to follow extremely conflicting instructions.
<b>Fautleroy</b>	Every deck person has a different system and they get frustrated when people cant tell what they want them to do.
<b>Anacortes</b>	It seems that the ferry employees that are hardest to figure out are the same ones that get upset when drivers don't know what they want them to do.
<b>Mukilteo</b>	Not enough crew onboard directing cars HOW to park. Results in extra space so fewer vehicles on board and longer wait times.
<b>Pt Defiance, Tahlequah, Fautleroy</b>	Deck hands often seem to assume drivers can read their minds. I commuted for 28 years and have a fair idea of what is expected, but inattention and vague hand signals are confusing. Also, the red/green light at Tahlequah is rarely cycled, use it right or turn it out!
<b>Orcas, Anacortes</b>	Rudeness and lack of experience by employees directing for parking.

# Summer Performance

## Vehicle Loading Issues Mentioned



*The employees giving poor hand signals (56%) and general loading/unloading issues (41%) are the top two complaints among people who are dissatisfied.*



Q51d. What specific (vehicle loading) conditions made you dissatisfied? (Multiple Response, n=567)

# Summer Performance

## WSF Vessels are well maintained and safe



*Dissatisfaction with WSF vessels being well maintained and safe is highest in San Juan Interisland (19%), Anacortes/San Juan (14%), and Seattle/Bremerton (14%) routes.*

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		4,410	831	314	89	453	333	183	31	222	620	1,235	59	40
WSF Vessels are well maintained and safe (2018)	Imp. (4-5)	<b>93%</b>	94%	93%	89%	91%	89%	92%	98%	94%	95%	95%	90%	100%
	Sat. (4-5)	<b>71%</b>	70%	61%	82%	69%	75%	65%	84%	85%	83%	63%	47%	76%
	Dissat. (1-2)	<b>9%</b>	10%	14%	8%	9%	7%	8%	6%	5%	3%	14%	19%	5%
<b>2016</b>	Dissat.	<b>11%</b>	12%	26%	8%	12%	3%	4%	7%	5%	4%	15%	10%	10%
<b>Change</b>	Dissat.	<b>-2%</b>	-2%	-12%	0%	-3%	<b>+4%</b>	<b>+4%</b>	-1%	0%	-1%	-1%	<b>+9%</b>	-5%

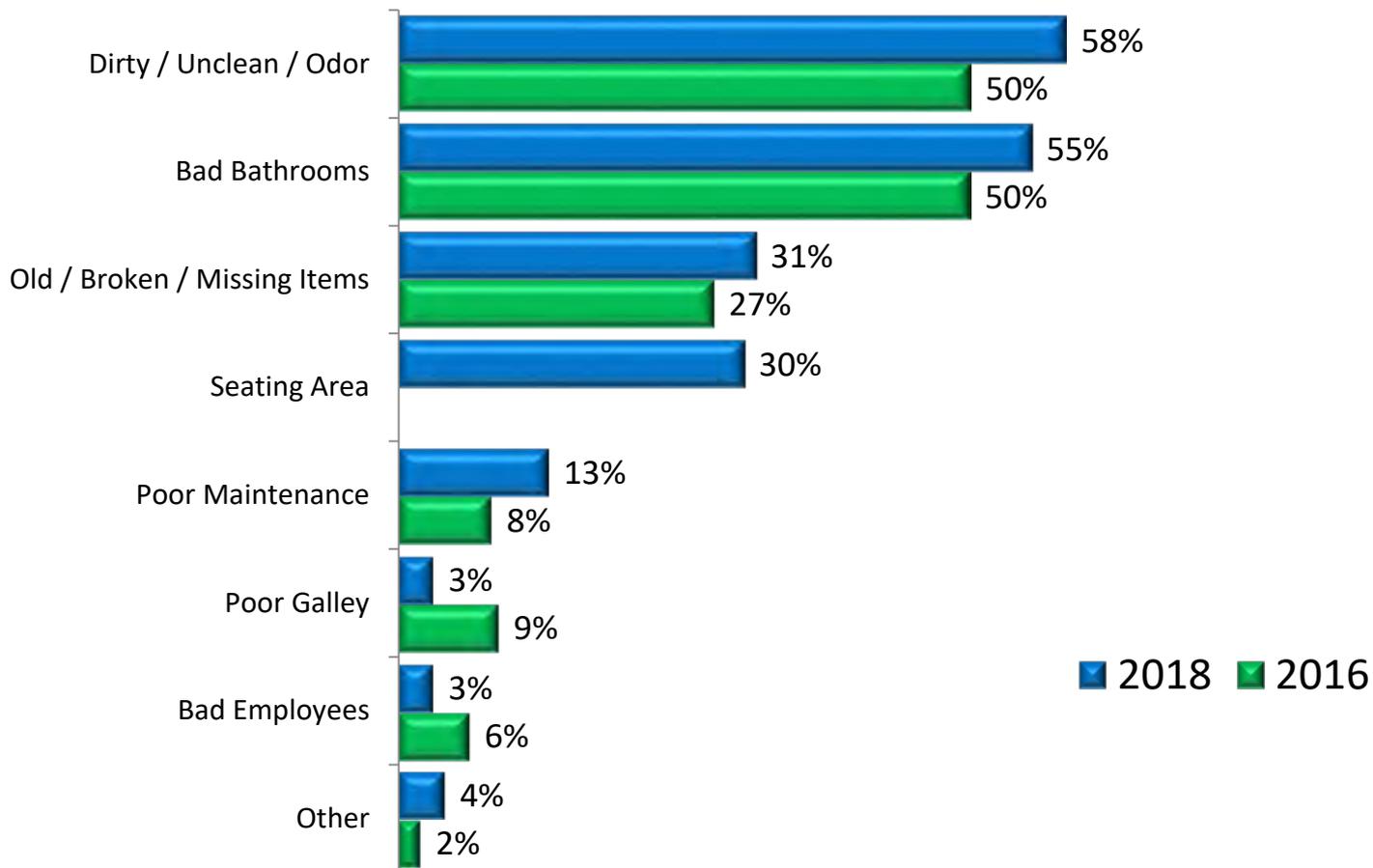
Top 4 Unsatisfactory Vessels	
Don't recall name	43%
Chimacum	12%
Tacoma	11%
Wenatchee	9%

Example of Verbatim Complaints	
<b>Chimacum</b>	No wi-fi, seats too crowded, no place to sit. People lie on bench seats. Seats too far from tables, galley is packed and crowded - no place to sit. Too hot. No hooks for bags or jackets. Floor tiles peeling up. The outside seats are even worse than inside.
<b>Chimacum</b>	Cramped cabin space -worn out / uncomfortable seats - BAD CELL RECEPTION - Poorly designed galley and eating areas. Bathroom on upper deck has been closed for weeks.
<b>Tacoma</b>	Restrooms dirty, leaky toilets, dirty passenger seats
<b>Tacoma</b>	The water sensors in the women's head at the sinks hardly work. Can those be tuned up? The sensors in the Wenatchee work really well.
<b>Wenatchee, Tacoma</b>	On both boats, the men's bathrooms were dirty/unmaintained and there was visible urine on the floor in various areas around the toilets. The automatic sinks were hard to use. Other than that the rest of the boats were very nice and clean.
<b>Wenatchee, Tacoma</b>	Overall condition of boat and bathrooms is shabby at best and just dirty at worst.

# Summer Performance Vessel Issues Mentioned



*General dirty / unclean / odor (58%) and bad bathrooms (55%) are the top two complaints among people who are dissatisfied.*



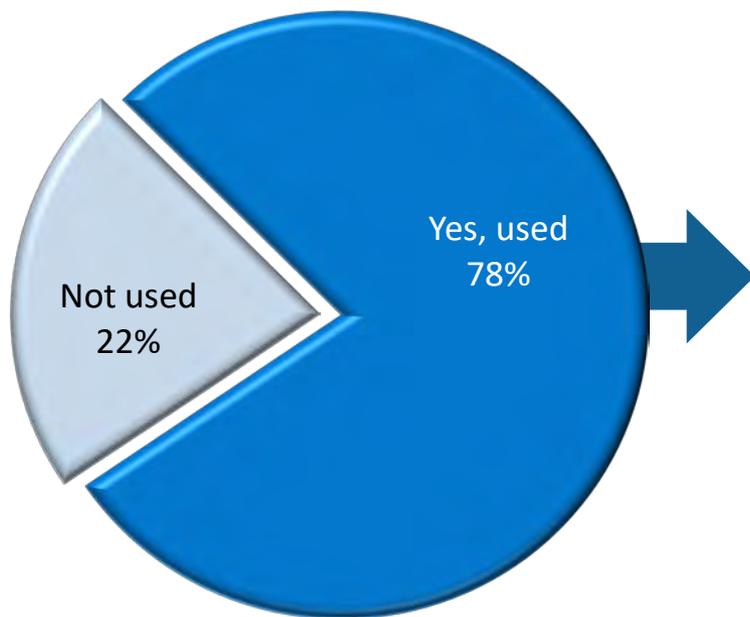
Q59c. What specific (vessel) conditions made you dissatisfied? (Multiple Response, n=425)

# Summer Performance Using WSF Website

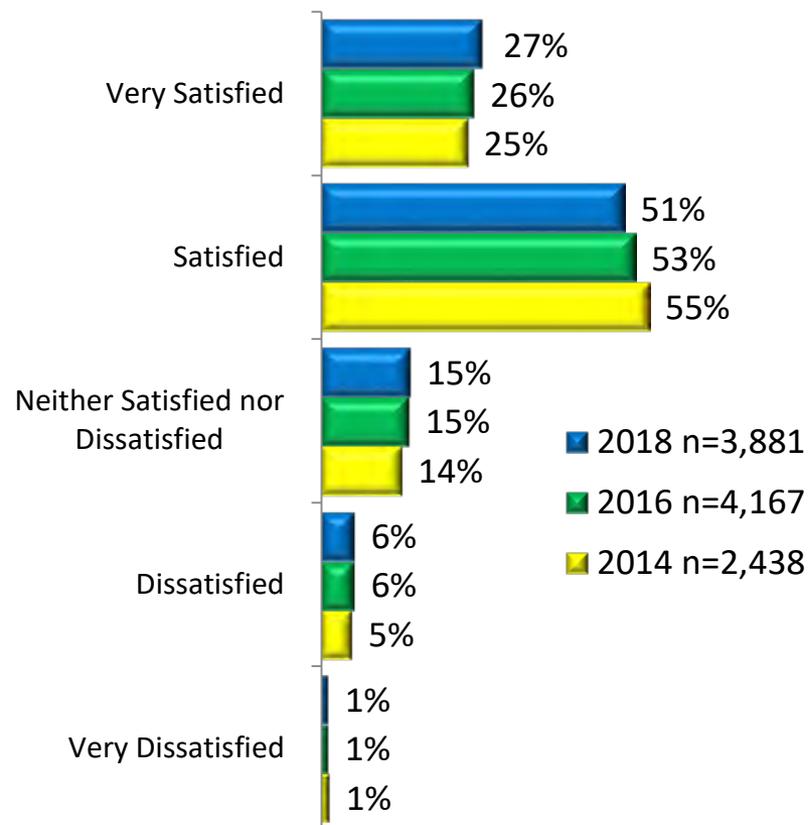


More than three quarters of summer riders (78%) have used the WSF website and a majority (78%) say they are satisfied with their experience (only 7% are dissatisfied with their website experience).

**Used WSF Website**  
n=4,672



**Experience Using Website**



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

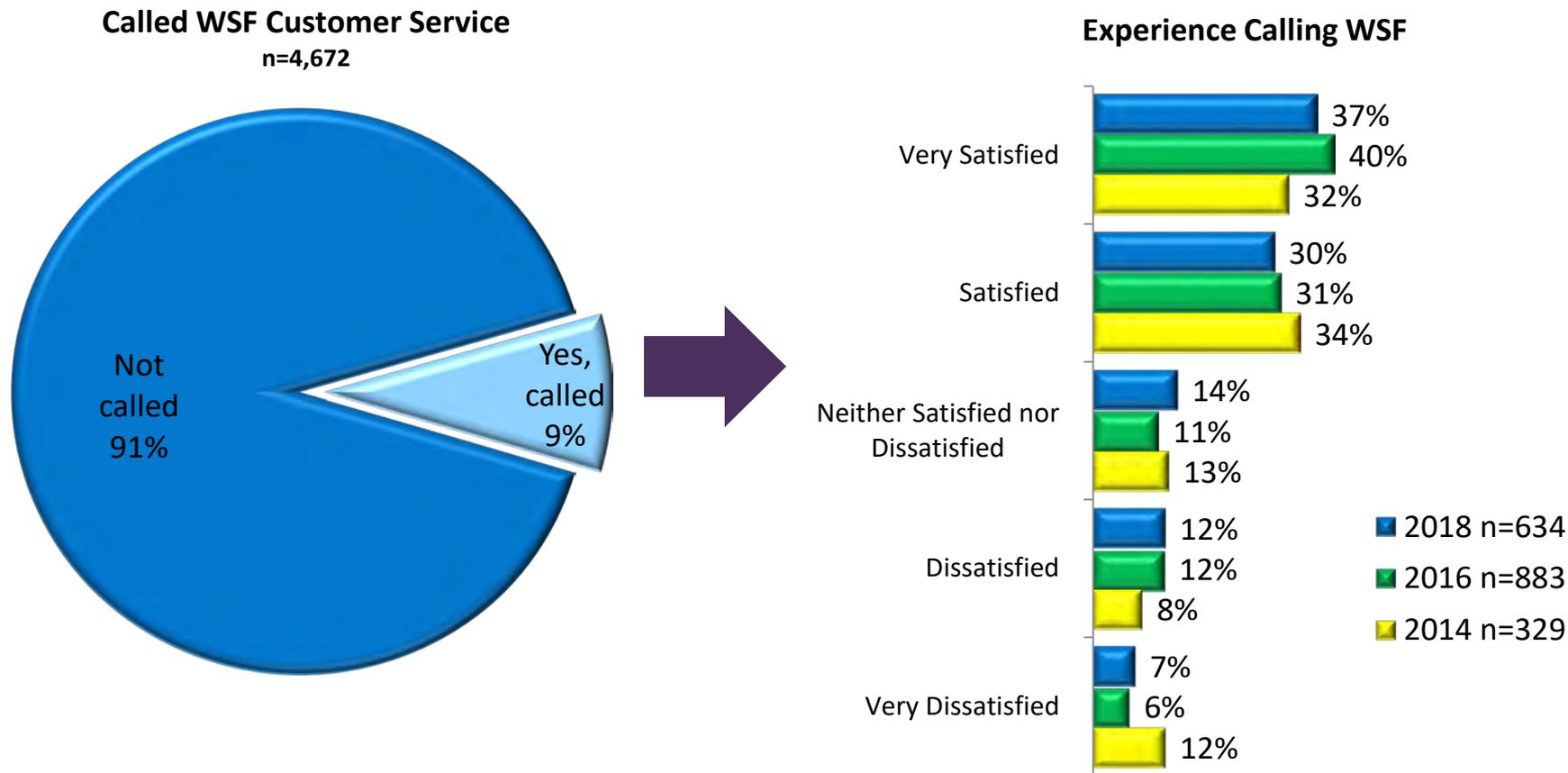
Q66. How satisfied were you with your experience using the WSF website?

# Summer Performance

## Calling WSF Customer Service by Phone



Very few respondents (9%) have contacted WSF customer service by phone. Of those respondents who have called, the majority are satisfied with their experience (67%). However, almost one in five (19%) are dissatisfied with their call.



Q65B. During the Summer period, have you for any reason called WSF by phone?  
 Q68. How satisfied were you with your experience calling the WSF by phone?



# Potential Policy Changes – Riders’ Reactions\*

\*The following questions explored possible changes to policies to inform early discussions and determine rider preferences. No formal proposals on these topics have been issued nor are under consideration.



### Contains Information Regarding:

- ❖ Potential Reservation Program Changes
- ❖ Potential Fare Changes - Anacortes / Sidney B.C.
- ❖ Potential Reservation Expansion
- ❖ Potential Freight Company Reservation Expansion
- ❖ Potential Freight Company Congestion Pricing
- ❖ Capital Funding Issues – General Public / FROG Members
- ❖ Suggested Service Improvements
- ❖ Encouragement of Walk-on Behavior
- ❖ Passenger Only Ferry Service

### Information Gathered From The Following Surveys:

- ❖ Winter Riders Survey (FROG panel)
- ❖ Freight Shippers Survey (Executive Interviews)
- ❖ General Public Survey (VOWS panel)
- ❖ Reservation Survey (FROG panel)
- ❖ Summer Riders Survey (FROG panel)
- ❖ WSF Policy Survey (FROG panel)\*

\* (The WSF Policy Survey was conducted in January 2019 focusing on potential WSF policy changes. A total of 5,141 completed surveys were collected between Jan 12 to Jan 28, 2019)

**\*NOTE:** The following questions explored possible changes to policies to inform early discussions and determine rider preferences. No formal proposals on these topics have been issued nor are under consideration.

### Key Findings

- ❖ *Fifty-nine percent favor WSF offering eastbound reservations from Lopez and Shaw Islands of those who travel to/from Lopez/Shaw.*
- ❖ *Twenty-seven percent of riders who have taken or are likely to take the Anacortes/Sidney BC route say they will not do so if fares increased by 25%.*
- ❖ *Of those who use or will use the Central Puget Sound ferry routes, 36% would support implementing a reservation system while 41% would oppose it.*
- ❖ *Support for putting reservations on only Friday afternoon through Sunday sailings (weekend only) seems to be uniform across all potential reservation routes at about one third.*
- ❖ *Non-Puget Sound (non-PS) residents are divided roughly in thirds when it comes to who should pay for capital investments between “Everyone,” “PS Residents,” “Ferry Riders” but lean towards PS residents paying.*



### Key Findings

- ❖ Westside Puget Sound residents are significantly more likely to say “everybody” should pay for capital improvements, compared to Eastside and non-Puget Sound Basin residents.
- ❖ Fifty percent or greater of all major regional groups (Puget Sound Westside, Puget Sound Eastside and non-Puget Sound residence) feel funding for replacing old ferries and improving terminals should get the same level of statewide funding as replacing old bridges and improving highways.
- ❖ When asked to select a preferred funding source for long-term capital needs from a list of options, “Establishing a new tax in Western Washington ferry served communities” (26%) and “Increase the statewide gas tax” (25%) received the most mentions by WSF riders. They are followed by “Establish a new statewide tax dedicated to funding ferry capital needs” (23%) and “Increase vehicle registration fees” (21%).

### Key Findings

- ❖ Riders would be willing to increase the ferry surcharge and pay, on average \$0.59 per ticket provided the funds continue to be dedicated to new ferries.
- ❖ After a short statement about what the current \$0.25 surcharge raises and the cost of a new 144 class ferry, riders would on average be willing to pay a surcharge of \$0.73 per ticket.
- ❖ One in four (23%) riders systemwide feel the impact of lower increases in passenger fares has encouraged their walk-on behavior.
- ❖ When asked which of four broad issues they felt WSF should focus on to improve its service, one in three (32%) said “Expand service / schedules for current routes” followed by “Build new ferries” (21%).
- ❖ Having private, for-hire ride-share services consistently at your destination terminal (52%) and real time parking availability information (50%) made about half of all riders who drive a vehicle onto the ferries more likely to consider walking on.



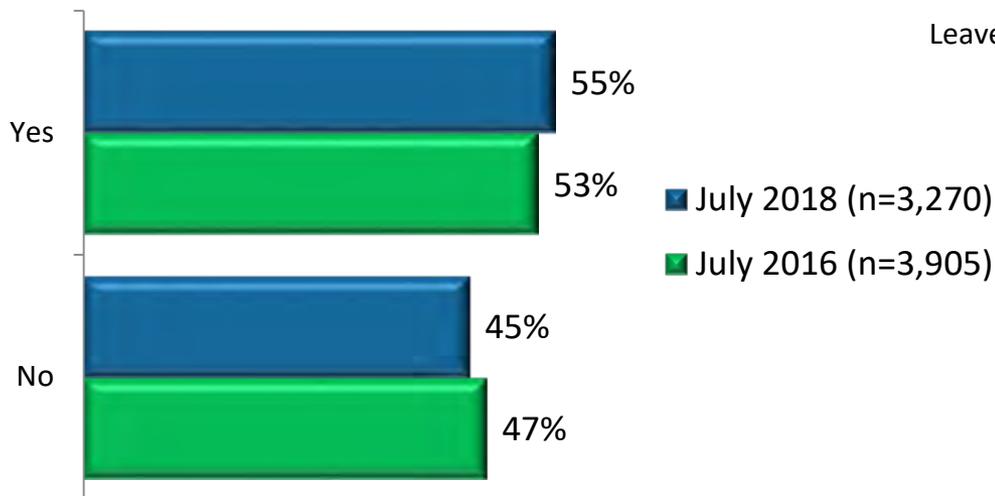
# Potential Reservation Program Changes

# No-Show Fees & Multiple Reservations.

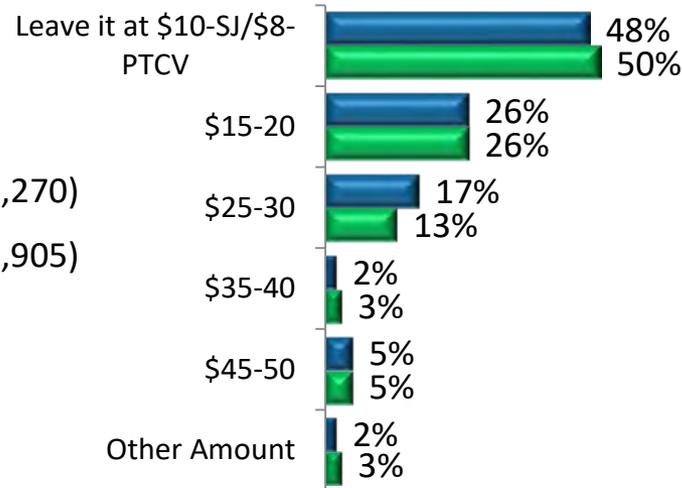


The 3,270 riders who have used the WSF reservation system were given a short background description on the impact of making multiple reservations for the same trip and asked if the no-show fees should be raised. Similar to 2016, 55% in 2018 said the no-show fees should be raised to \$24 compared to \$23 in 2016 (on average). Visitors to San Juan Islands (57%) are more likely to say increase the no-show fees than either part time San Juan Islands residents (54%) or full time San Juan Islands residents (39%). Those living on Lopez Island (46%) are more likely to want the no-show fees increased than Orcas (39%) or San Juan (36%) Island residents. The average increase based on all 3,270 respondents for the no-show fee is \$17 (in both 2018 and 2016).

**Increase No-Show Fees**



**Suggested Amount**



Q6n Background: The current no-show fees that most people pay for standard size vehicles is \$10 per no-show in San Juan (\$8 for Port Townsend/Coupeville). Some riders are booking multiple reservations on multiple sailings for their single trip which causes more boats to show as “full” on the reservation site. It also means boats may leave with space available given the no-shows by those riders. Question: Should the no-show fees be increased to cut down on the multiple reservation bookings on multiple sailings for a single trip? Q6o The current no-show fee for vehicles is \$10 in San Juan (\$8 for Port Townsend/Coupeville) for a standard size vehicle, what would you suggest the fee be increased to in order to cut down on multiple reservation bookings on multiple sailings for a single trip?

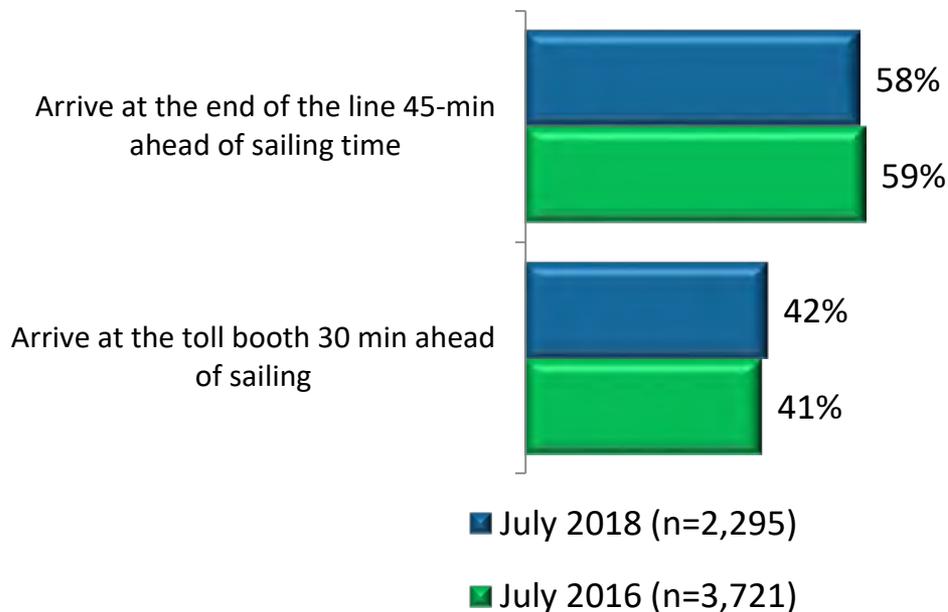
# Potential Reservation Program Changes

## Reservation Check-in Issues - “On-Time” Arrival



*The 2,295 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were given two choices and asked to select which they felt WSF should use to determine if you have arrived on time. Similar to 2016, 58% in 2018 said it should be based on their arrival at the end of the line 45 minutes ahead of sailing time.*

### Determine “On-Time” Arrival, If You ...



- ❖ Comments given by riders as to what method should be used to determine if you have arrived in line within 45 minutes included:
  - Take a camera shot of time/ferry line.
  - 45 minutes prior to the boat departing (not SCHEDULED, but ACTUAL), either have an agent walk down the line and put a slip under the windshield wiper of the last car, or write down the license number of the last car.
  - Have one of the workers walk the line with a hand held devise to confirm who has reservations.
  - Code of Honor. They can ask each car how long they were in line, most will be honest.
  - If I have paid for my ticket it is confusing as to why I have to be at the toll both 30 minutes before. In line 30 minutes before makes sense to me.

*Q6j How should Washington State Ferries determine if a vehicle has arrived “on-time” for their reservation? If they ... Q6k By what method should WSF use to determine if you have arrived in line within 45-minutes ahead of your scheduled sailing?*

# Potential Reservation Program Changes

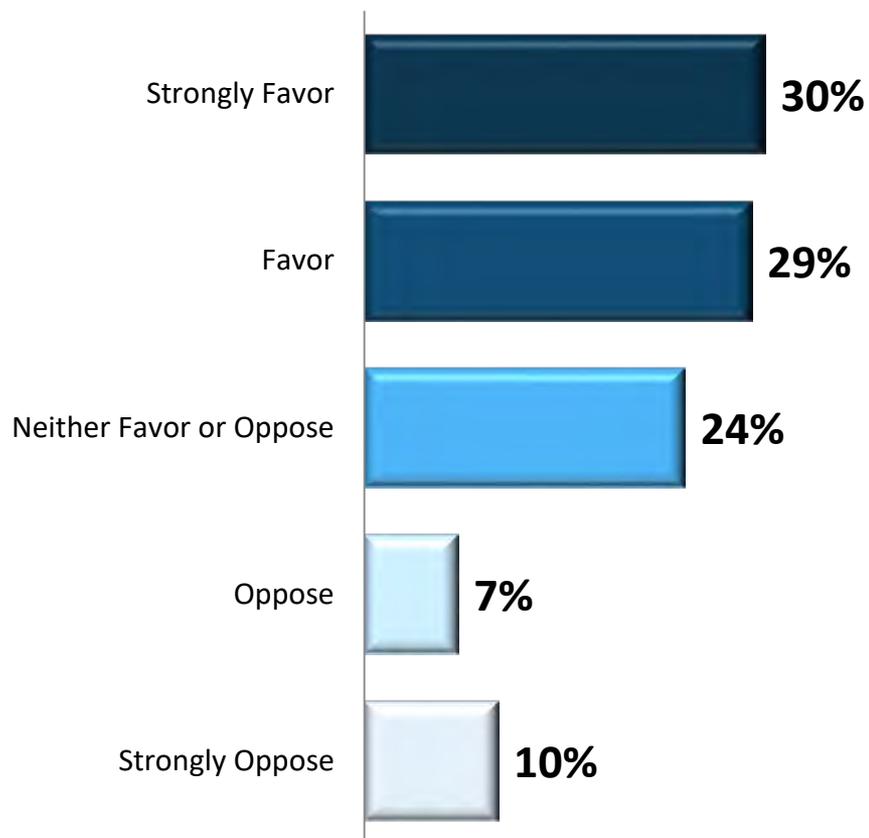
## Eastbound Reservations – Lopez/Shaw



*Of the 618 riders who traveled to/from Lopez and Shaw Islands, 59% favor WSF offering eastbound reservations from Lopez and Shaw Islands with 17% opposing it.*

### Favor or Oppose WSF Offering Eastbound Reservations

(n=618)



Q6q4 Would you favor or oppose WSF offering eastbound reservations from Lopez and Shaw Islands?



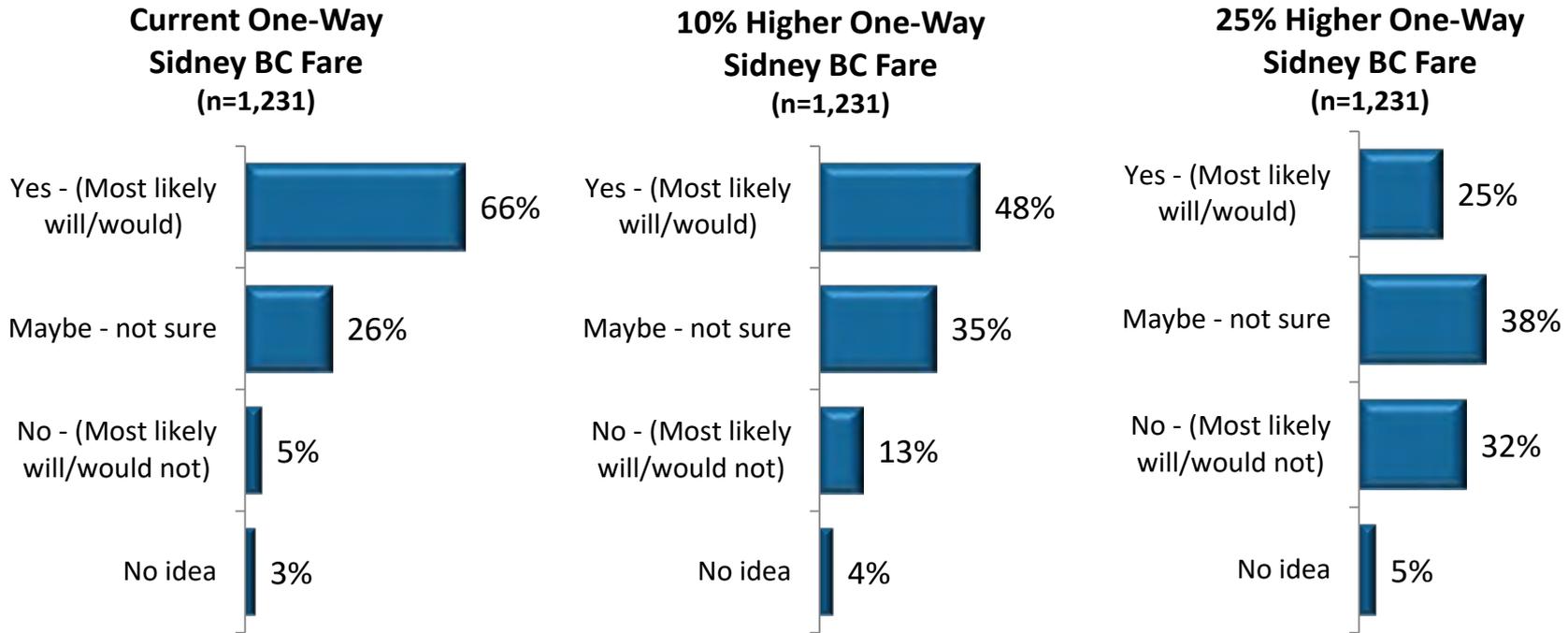
# Potential Fare Changes Anacortes/Sidney B.C.

# Potential Fare Changes -Anacortes/Sidney BC

## Fare Impact on Trip



*The 1,231 riders who have taken or are likely to take the Anacortes/Sidney BC route were asked if they would take the trip under the current fare structure (or if fares increased by 10% and 25%). Five percent (5%) said they would most likely not take the trip at the current fare level. Those saying they would not take the trip increased about 2.5 times when fares increased by 10% and 6.5 times when fares increased 25%.*



Q8b Given the Anacortes to Sidney BC ferry fares (One way fare - Walk-on \$19.85; Car <22ft \$68.95; RV 30> \$106.80; RV 31-40ft \$142.30), will you still take the ferry trip? Q8c If the Anacortes to Sidney BC ferry fare had been 10% higher, will you / would you still take the ferry trip? Q8d If the Anacortes to Sidney BC ferry fare had been 25% higher, will you / would you still take the ferry trip?



# Potential Reservation Expansion

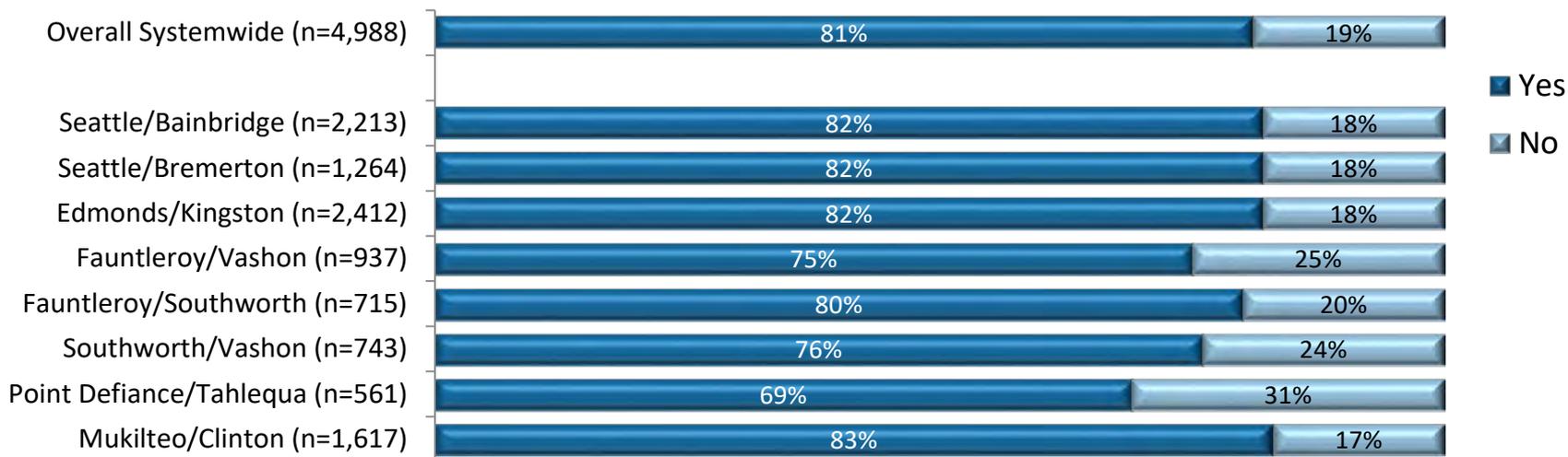
# Potential Reservation Expansion

## Reasonableness of Reservation Program Concept



*Those who are currently travelling or planning to travel on / off of Vashon Island are considerably less likely to see the described reservation program as reasonable compared to all other potential Central Sound routes users.*

### Program Reasonableness By Users of Potential Central Puget Sound Reservation Routes



*Q.7a Reservations have been implemented on limited routes in the North Sound to better accommodate high travel demand on longer routes with consistently large numbers of occasional/recreational riders. Reservations provide predictability around travel times and allows travelers to plan their trips with more reliability. The current approach to reservations is done via a tiered reservation system and here is how it currently works :*

***For Port Townsend/ Coupeville & Anacortes/Sidney BC sailings:***

*All reservations for a sailing schedule season are available two months prior to the start of the season. Up to 80% of the space on the Port Townsend route and 100% of the space on the Anacortes (99% on Sidney B.C.) route can be reserved.*

***For San Juan sailings:***

*Reservations are available for up to 90% of the San Juan Island sailing space. Two months ahead of the sailing schedule season, 30% of the regular height space (typically general vehicles) and 100% of all tall height space (vehicles over 7'2" high or over 30' long – typically commercial vehicles / Motorhomes / RVs) becomes available for reservations. At 7 am two weeks prior to any individual travel day, an additional 30% of the regular height space becomes available. The remaining 30% becomes available at 7 am two days prior to the travel day.*

*Based upon the above, does the WSF reservation program seem reasonable to you?*

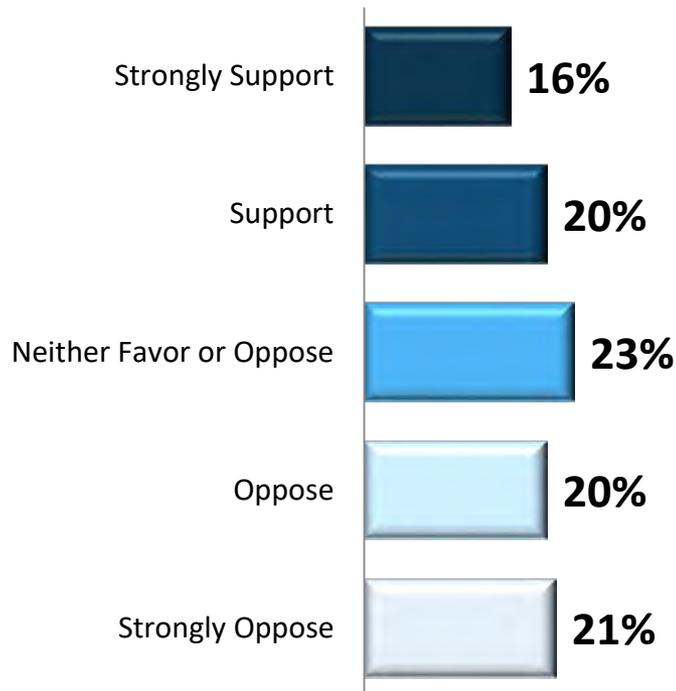
# Potential Reservation Expansion Program Support & Why



Of those 4,088 riders who use or will use the Central Puget Sound ferry routes, slightly over a third (36%) would support developing a reservation system while 41% would oppose the development.

## Support or Oppose the WSF Developing Reservation System for Central Puget Sound Routes

(n=4,088)



❖ Comments given by the 36% (n=1,488) who would support reservation expansion and how they want it to work included:

- 30% Feel WSF should use the existing reservation system
- 22% Feel regular riders should get some sort of priority
- 17% Feel the web/online system is a positive
- 16% Feel there are positive benefits to reservations
- 15% Want more unreserved space for unplanned trips

❖ Comments given by the 41% (n=1,557) who would oppose reservation expansion included:

- 40% Don't feel they can plan ahead effectively
- 35% Feel that it penalizes commuters / regular riders
- 21% Feel it just will not work / make things better
- 12% Feel first come / first serve is a better system
- 11% Feel reservation system is too hard

Q7e In general, would you support or oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7f Why would you oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7g How would you like the central Puget Sound reservation to work?

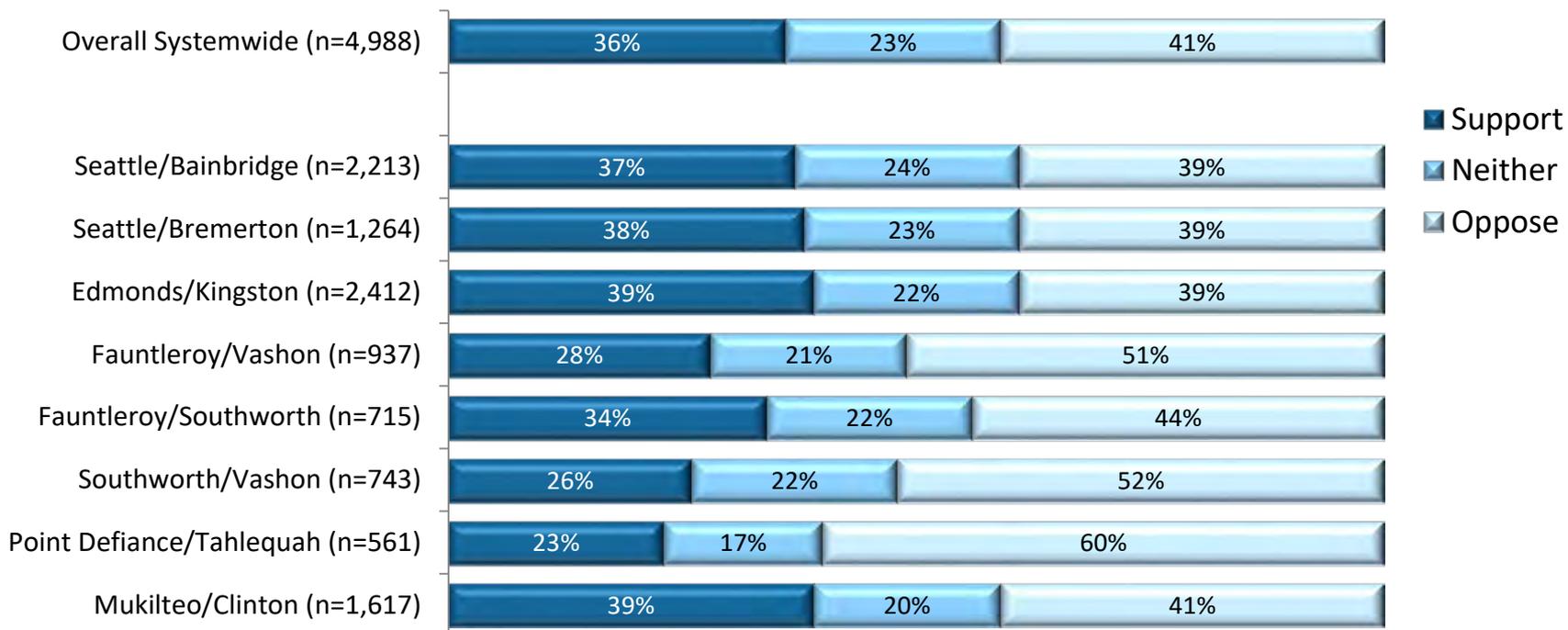
# Potential Reservation Expansion

## Support by Route



*The support for WSF developing a central Puget Sound reservation system is uniform across users of all potential routes (support scores between 37-39 percent) except for those that travel on / off Vashon Island (support scores all under 30%) and to a less extent those that use the Fauntleroy/Southworth route (34% support).*

### Support for WSF Developing Central Puget Sound Reservation System



*Q7e In general, would you support or oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7f Why would you oppose the concept of WSF developing a reservation system for the central Puget Sound ferry routes you take? Q7g How would you like the central Puget Sound reservation to work?*

# Potential Reservation Expansion

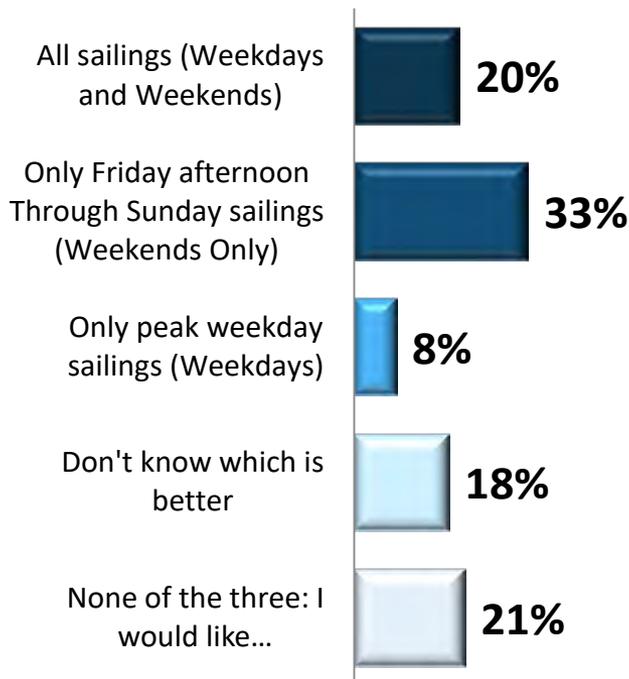
## Sailings Desired for Reservation Expansion



*Of those 4,088 riders who use Central Puget Sound ferry routes, one third (33%) would want reservations on only Friday afternoon through Sunday sailings. About one in five either want it on all sailings (20%), have a suggested alternative method (21%), or just don't know which is better (18%).*

### What Sailings Should Central Sound Reservations Be On?

(n=4,088)



❖ Comments given by the 21% (n=788) who said “none of the three; I would like” .. included:

- Don't want reservations. Want first come as it is.
- Priority to residents of WA state that depend on the ferry for transportation.
- Only during the summer season and only a small percentage like 20% able to be reserved.
- Exactly none of the above... NO RESERVATIONS!
- More frequent sailings.
- I don't see how reservations are even possible given the loading accommodations at some terminals. Also these are more of a commuter run than holiday / vacation plus traffic in Seattle, Tacoma is such that you could miss a ferry. Bad idea.
- Remember! There are NO buses at Bainbridge Island for passengers to use in evenings. The lack of last minute reservations will not then allow people to go on as passengers only when there are NO BUSES.

Q7h If WSF did develop a reservation system for the central Puget Sound ferry routes and there were three choices to select from, would you prefer ... ?

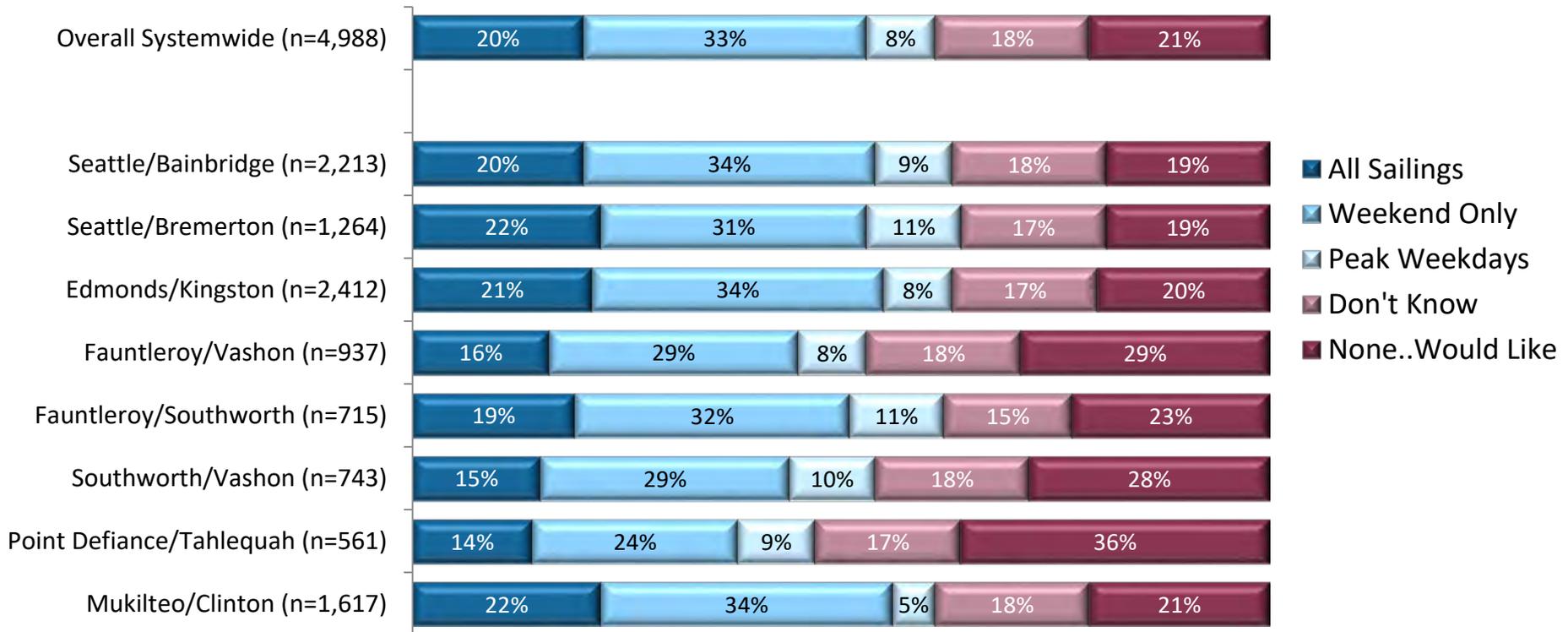
# Potential Reservation Expansion

## Sailings Desired for Reservation Expansion by Route



*Putting reservations on only Friday afternoon through Sunday sailings (weekend only) seems to be uniform across all potential reservation routes at about one third. Again weekend support is weakest for those going on / off of Vashon island.*

### What Sailings Should Central Sound Reservations Be On?



Q7h If WSF did develop a reservation system for the central Puget Sound ferry routes and there were three choices to select from, would you prefer ... ?

# Potential Reservation Expansion

## Approach to Reserving Space



Of those 4,088 riders who use Central Puget Sound ferry routes, over one third (38%) would suggest the current tiered release structure be used. About one in five either want a single release (18%), have a suggested alternative method (21%) or just don't know which is better (23%).

### Tiered or Single Release Preference

(n=4,088)



❖ Comments given by the 21% (n=783) who said “neither; I would like” .. included:

- 50% available for all trips after midnight on weekdays.
- 70% reservation cap for every crossing.. . 30% Always available for travelers and incidental use.
- No reservation system!
- NO NO! Less than 50% un-reservable would be a disaster!
- Similar to the Tiered release, except that each release is only 10% and the third & final release is at 6 hours prior to sailing. Thus, only 30 percent is reservable.
- Commuters are able to reserve a spot for normal commuter trip times and have a monthly pass or something that guarantees commuters first choice on sailings.

Q7i The following is a brief overview for context: San Juan reservations are available for up to 90% of the sailing space, but it is offered up on a tiered basis. Two months ahead of the sailing schedule, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. Questions: If WSF did develop a reservation system for the central Puget Sound ferry routes and there were only two choices to select from, would you prefer it be a tiered release like in the San Juan's, or a single release where all the space is available for reservations at once? Responses: (1) Tiered Release: Two months ahead of any individual travel / sailing day, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. And 10% is not reservable. (2) Single Release: Two weeks ahead of any individual travel / sailing day, 90% of the space becomes available for reservation. And 10% is not reservable (3) Don't know which is better ... (4) Neither: I would want something like ...

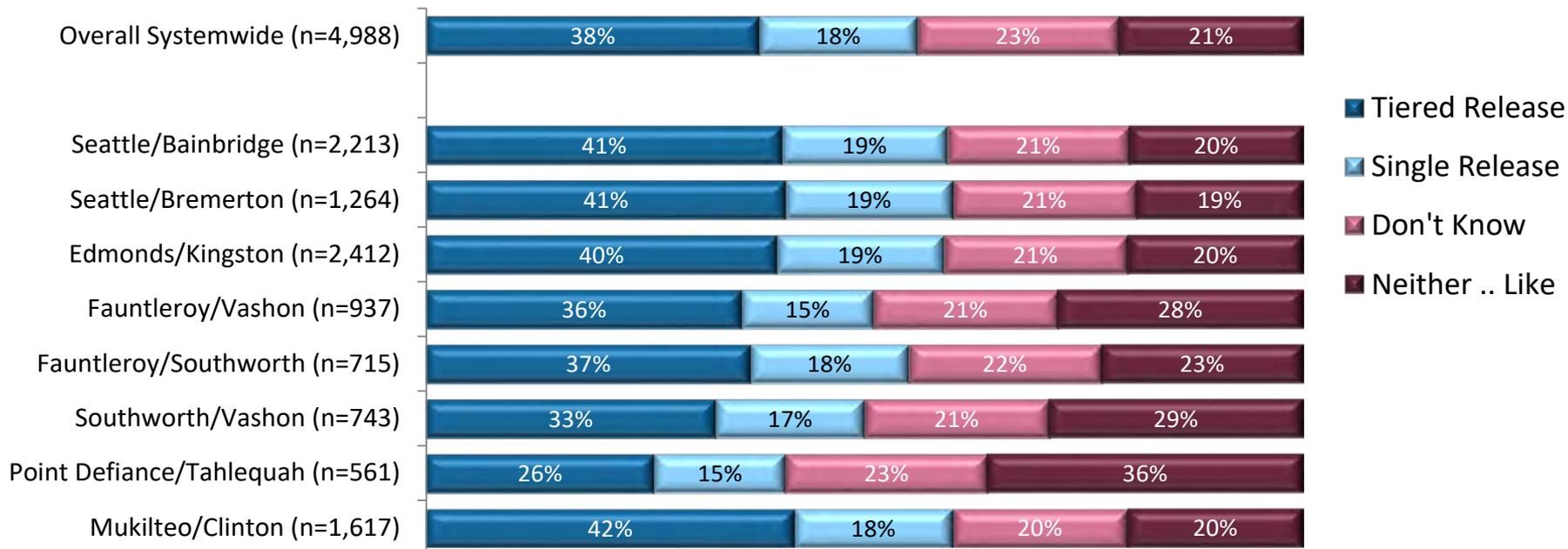
# Potential Reservation Expansion

## Approach to Reserving Space by Route



*The tiered release plan is the most liked by all potential reservation riders except those riding or planning to ride the Point Defiance/Tahlequah route.*

### Tiered or Single Release Preference



*Q7i The following is a brief overview for context: San Juan reservations are available for up to 90% of the sailing space, but it is offered up on a tiered basis. Two months ahead of the sailing schedule, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. Questions: If WSF did develop a reservation system for the central Puget Sound ferry routes and there were only two choices to select from, would you prefer it be a tiered release like in the San Juan's, or a single release where all the space is available for reservations at once? Responses: (1) Tiered Release: Two months ahead of any individual travel / sailing day, 30% of the space becomes available for reservations. Two weeks prior to any individual travel day, an additional 30% becomes available. The remaining 30% becomes available two days prior to the travel day. And 10% is not reservable. (2) Single Release: Two weeks ahead of any individual travel / sailing day, 90% of the space becomes available for reservation. And 10% is not reservable (3) Don't know which is better ... (4) Neither: I would want something like ...*



# Potential Freight Company Reservation Expansion

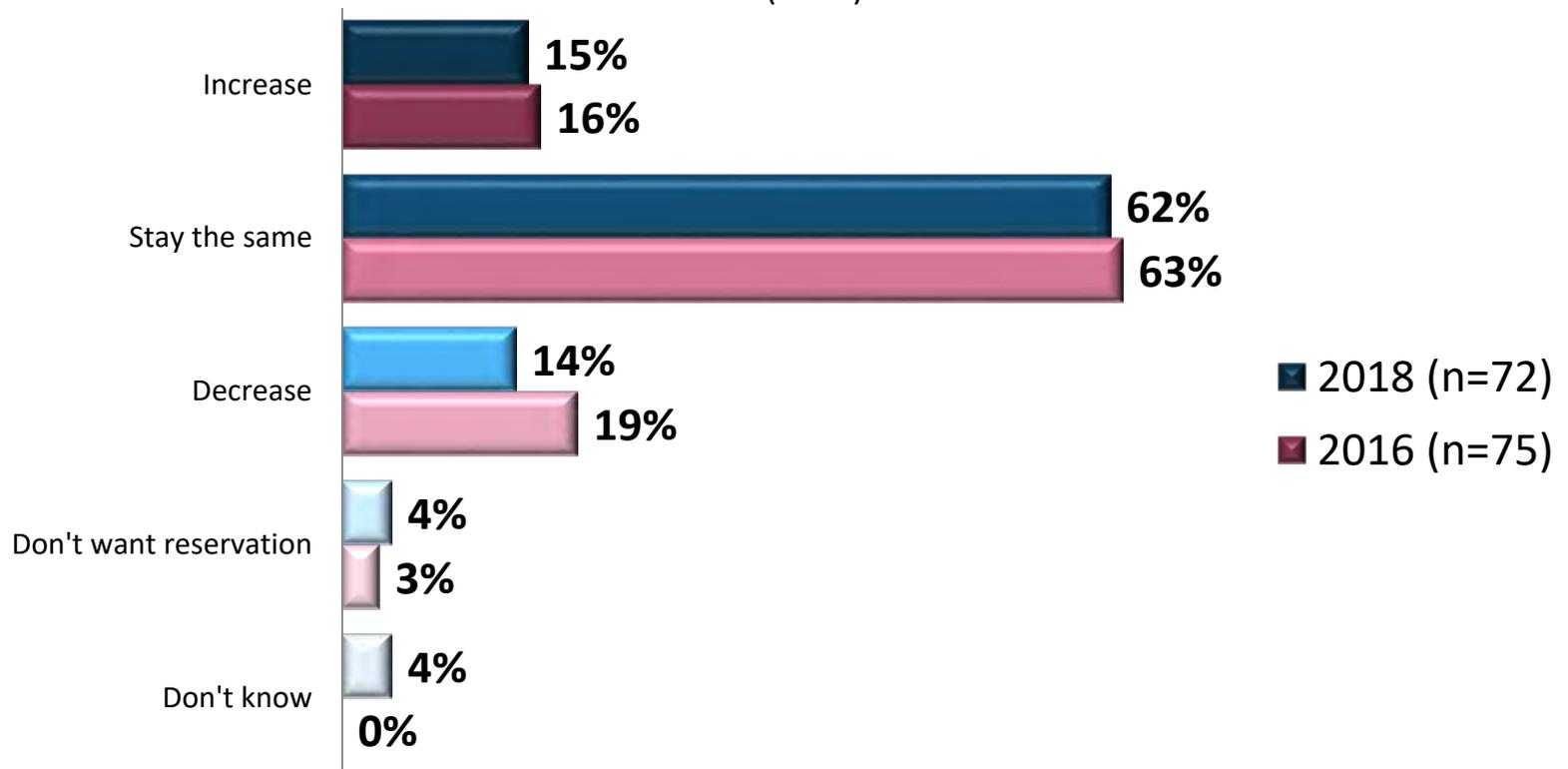
# Potential Freight Company Reservations Expansion Business Impact



*Of those freight customers who use Central Puget Sound ferry routes (n=72), two thirds (62%) would not change their ferry usage given a central sound reservation system, and only 15% would increase usage. This is similar to 2016.*

## Freight Use WSF More w/ Reservation System - 2018

(n=72)



Q29. If all of the Central Puget Sound ferry routes had a reservation system, would your companies usage increase, decrease or remain the same?

# Potential Freight Company Reservations Expansion

## Reservations – Central Sound Deposit Amount

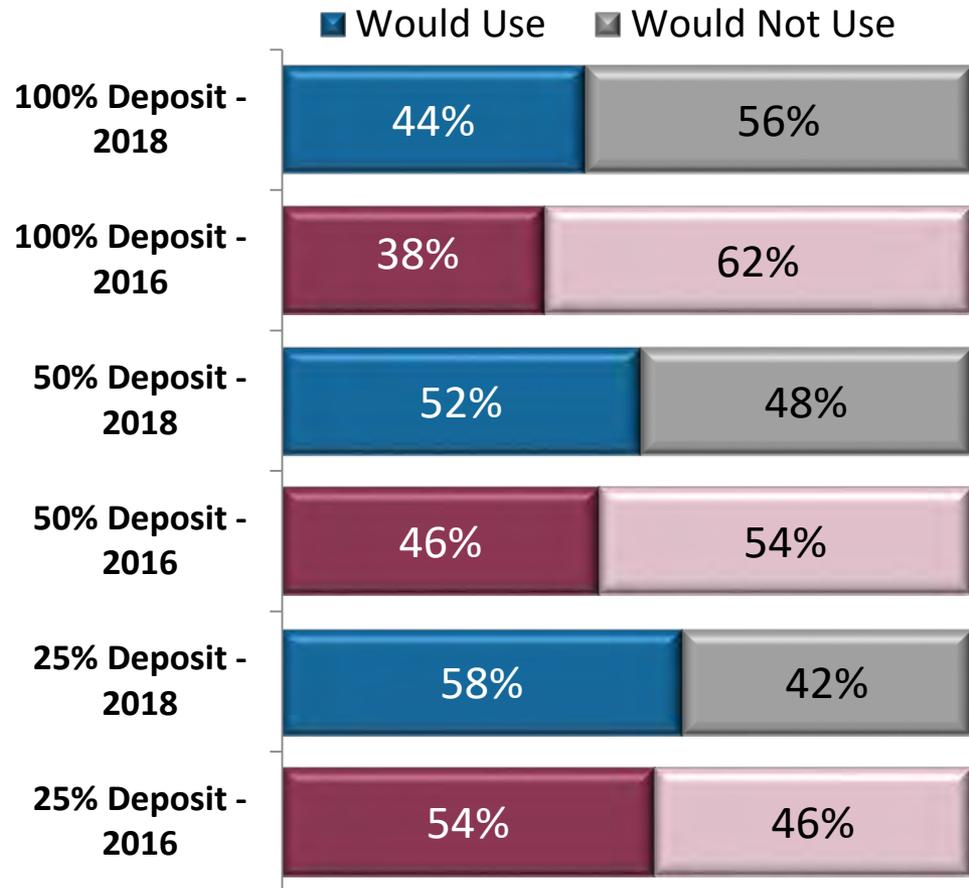


*Of those who would be open to a vehicle reservation system for Central Puget Sound routes, about half say they would be likely to use the system as described with either a 50% or 25% deposit. Attitudes towards usage dependent on deposit level has not change between 2016 and 2018.*

The current WSF vehicle reservation system has the following features:

- Space is available for reservations up to two months ahead of the season schedule start date;
- No reservation deposit is necessary at the time the reservation is made;
- A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day;
- Reservations may be cancelled and/or changed once up to 5 pm of the prior day with no penalty;
- If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and
- The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.

Q30-32. How likely would your company be to use this vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say ... ?



# Potential Freight Company Reservations Expansion

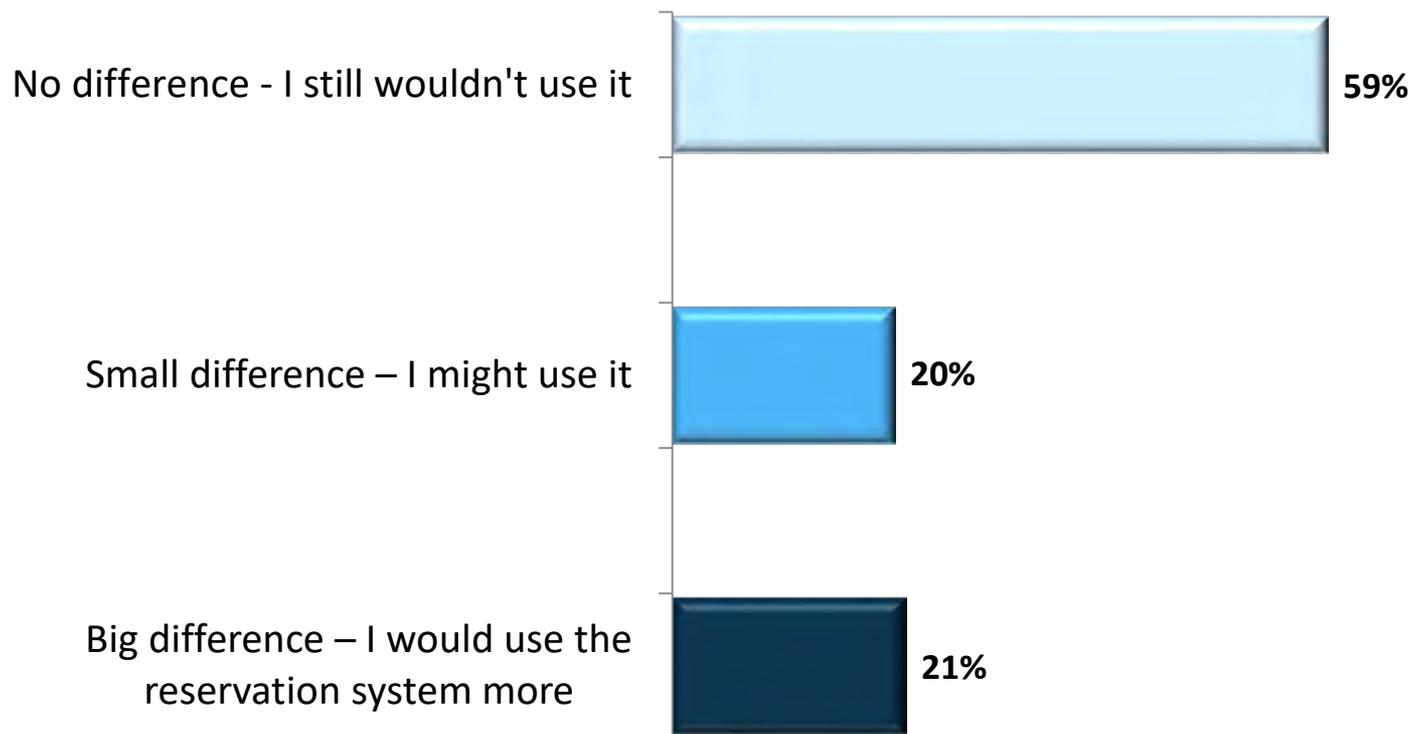
## Impact of Arriving 10 vs. 30 Minutes Early



*Adding a 20% charge to freight reservations but only requiring the truck show up 10 minutes instead of 30 minutes before sailing would have a positive impact on four in ten (41%) of freight reservation users.*

### Freight Trucks Arriving 10 min. vs 30 min. Early for 20% Fee

2018: n=97



*Q33 How much of a difference would it make if WSF charged 20% more for reservations but only required that you show up 10 minutes instead of 30 minutes prior to your sailing to receive your guaranteed space? Would you say that showing up 10 minutes instead of 30 minutes prior to your sailing to receive your guaranteed space would make a ... ?*



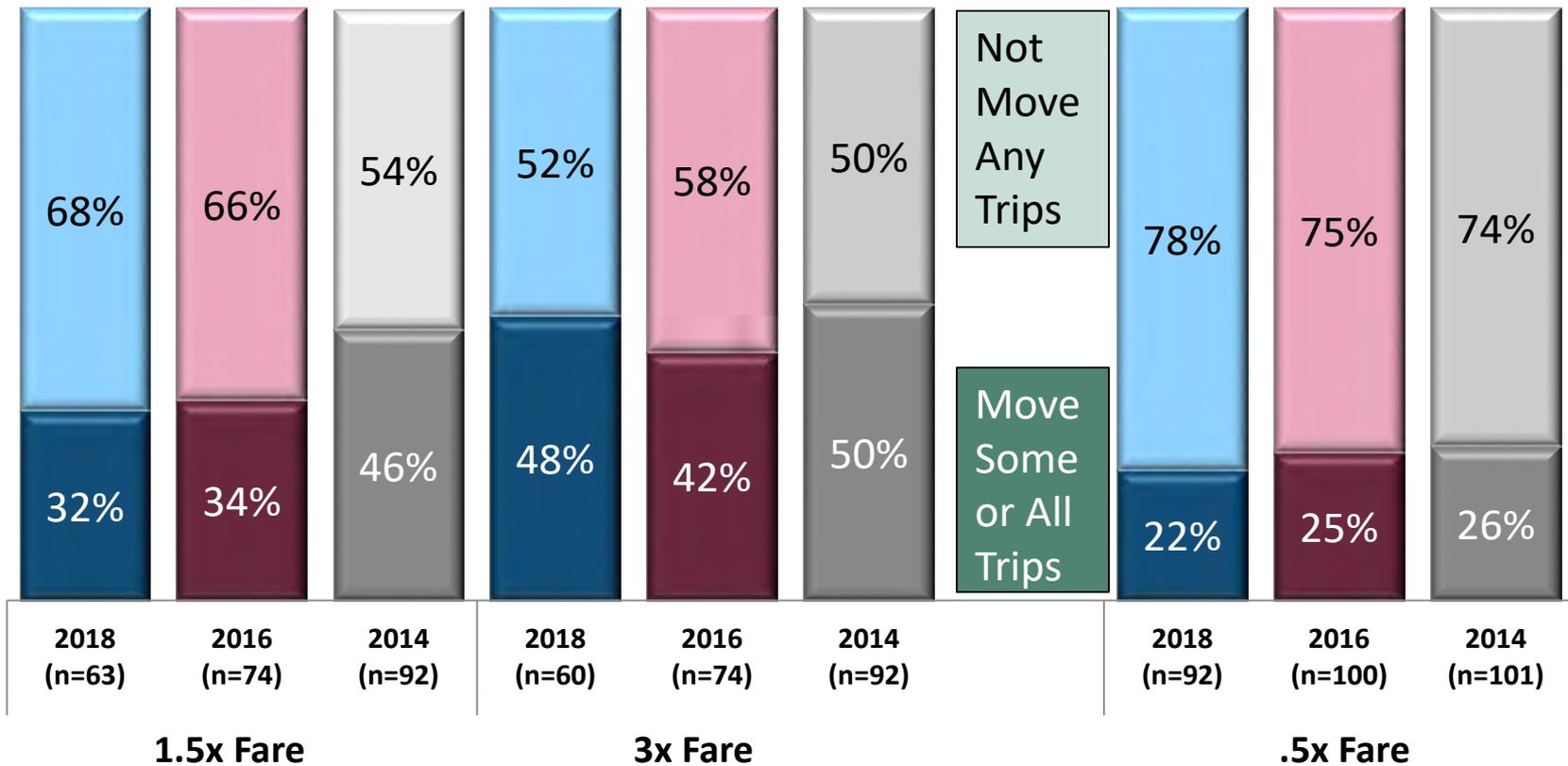
# Potential Freight Company Congestion Pricing

# Potential Freight Company Congestion Pricing Impact on Moving Trips to Off Peak



*If time of day fares are introduced, the likelihood of moving trips given changes in fare levels has remained the same between 2016 and 2018.*

## Would Move Freight Trips to Off Peak Times if Fare Was ...



Q34-35. If freight customers who use the ferry during peak travel periods were charged one and a half times/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times? Q36. If freight customers on overnight sailings between 9pm and 5am each day were charged just half of the fare currently charged for freight vehicles, what percent of your freight trips would you schedule for the 9pm and 5am time period?

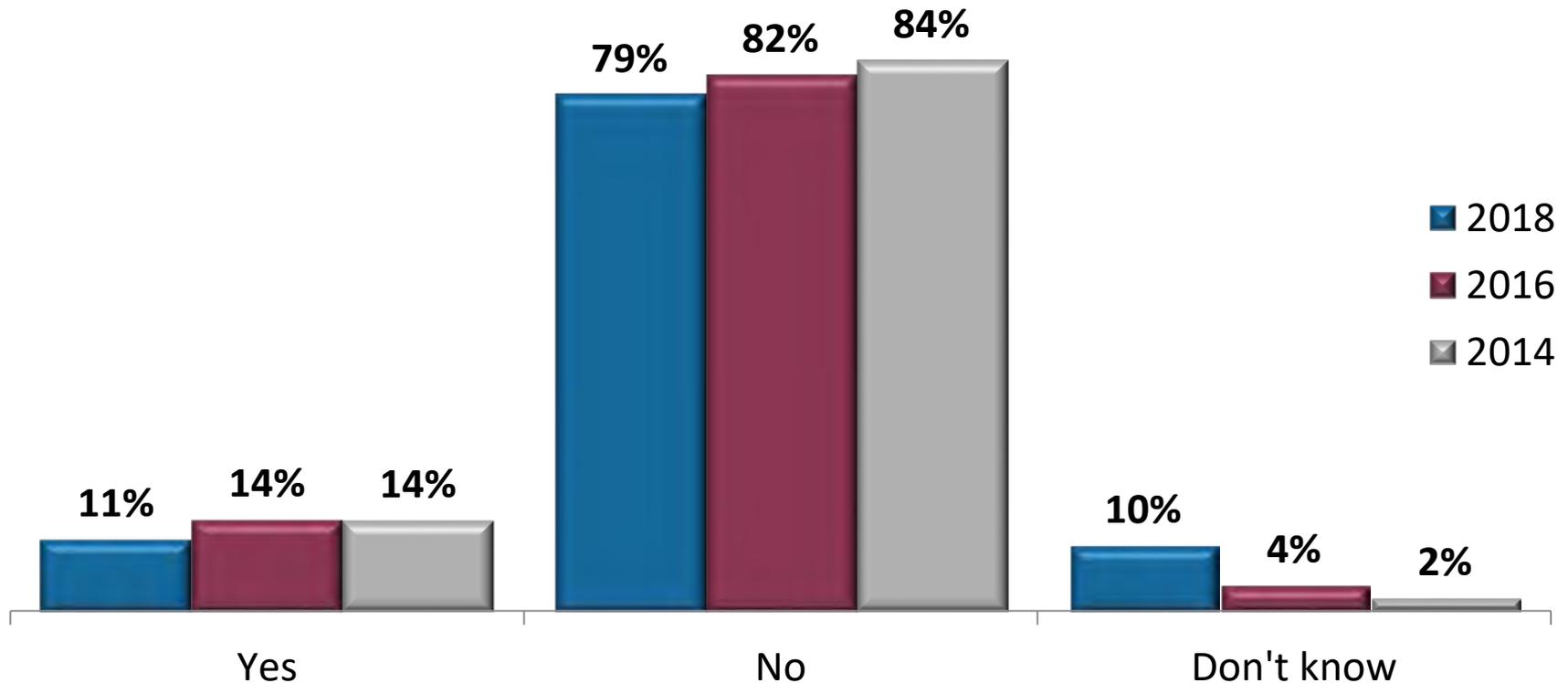
# Potential Freight Company Congestion Pricing

## Secure Parking



Consistent with the 2014/16 respondents, most freight customers in 2018 (79%) say a secure parking area on the arrival side would not make them more likely to schedule ½-priced late-night ferry sailings.

### Free Secure Overnight Freight Truck Parking



Q37. Would a free secure parking area on the arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?



# Capital Funding Issues

## General Public / FROG Members

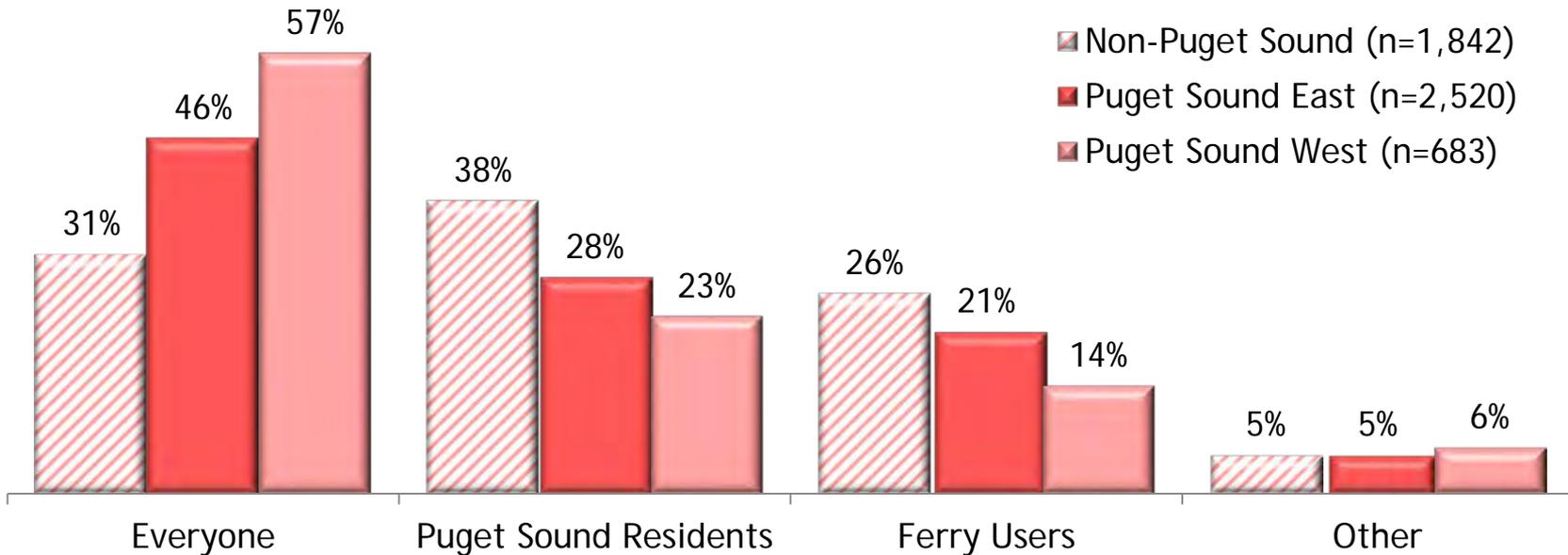
# Capital Funding – General Public

## Attitude Towards WSF Capital Funding



Like 2016, 2018 non-Puget Sound (non-PS) residents are divided roughly in thirds when it comes to who should pay for capital investments (Everyone – 31%, Puget Sound Residents – 38%, Ferry Riders – 26%) but lean towards Puget Sound residents paying. Westside Puget Sound residents are significantly more likely to say “everybody” should pay for capital improvements (57%), compared to Eastside Puget Sound (46%) and non-Puget Sound Basin (31%) residents.

### Who should pay for capital investments? (2018)



Q21 Daily ferry operations are one cost, and they are covered about 75% by ferry fares and 25% by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. Like how capital investments in roads and bridges are paid for, funds can come from statewide gas taxes, regional taxes or local usage tolls. In order to pay for needed capital investments in the ferry system should the state raise the money from ...

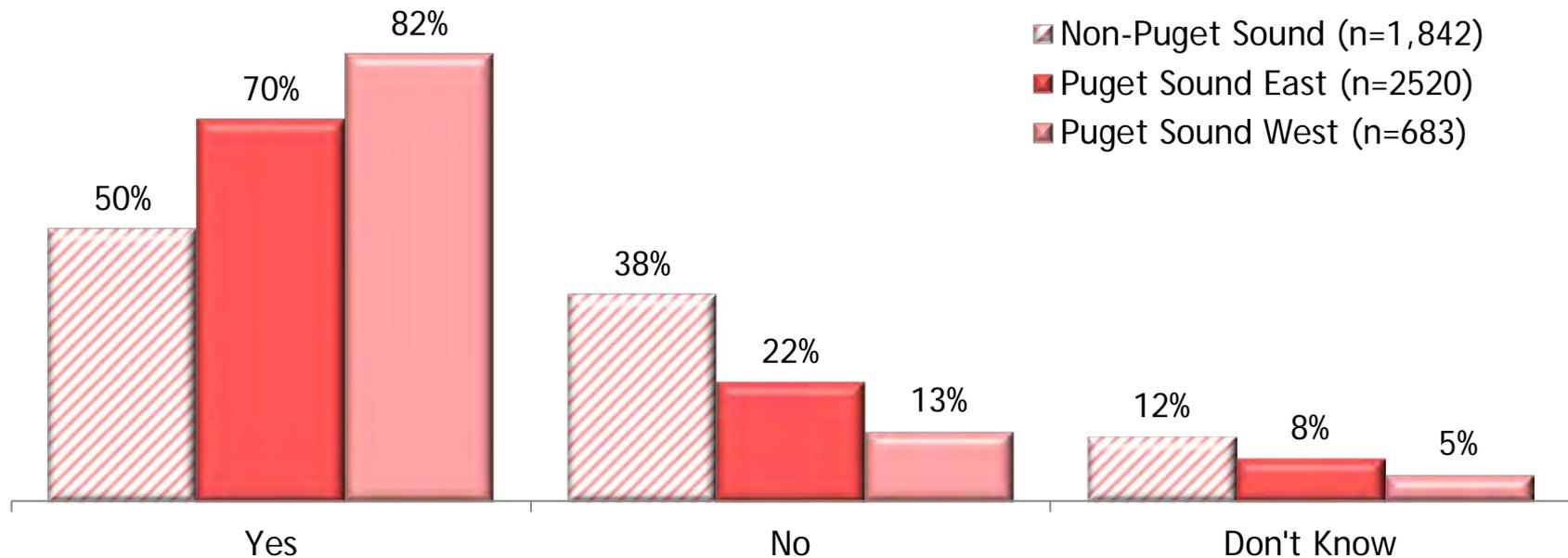
# Capital Funding – General Public

## How Should Capital Funding Level be Calculated



Fifty percent or greater of all major regional groups (Westside Puget Sound, Eastside Puget Sound, and non-Puget Sound residents) feel funding for replacing old ferries and improving terminals should get the same level of statewide funding as replacing old bridges and improving highways. Non-Puget Sound residents (50%) are 20 to 30 percentage points lower on recommending same funding levels than both Puget Sound East (70%) or Puget Sound West (82%) residents.

### Same Funding of Old Ferries / Improving Terminals as Old Bridges / Improving Highways (2018)



Q22 Should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways?

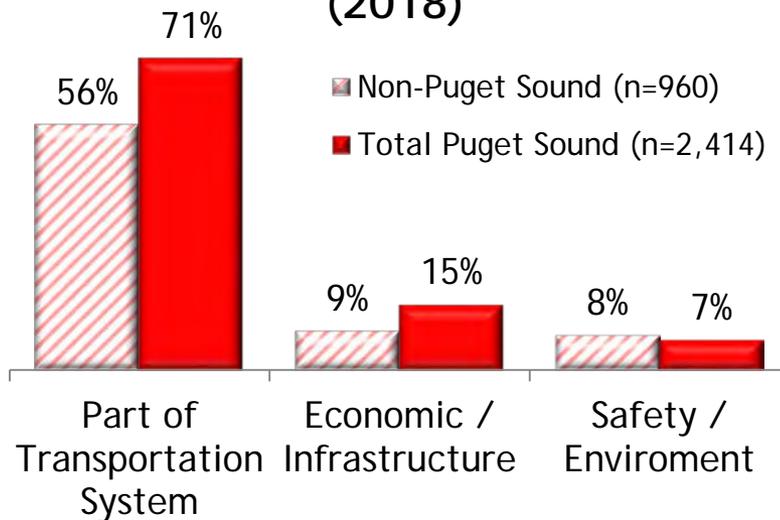
# Capital Funding – General Public

## Reasons for Selecting Capital Funding Level

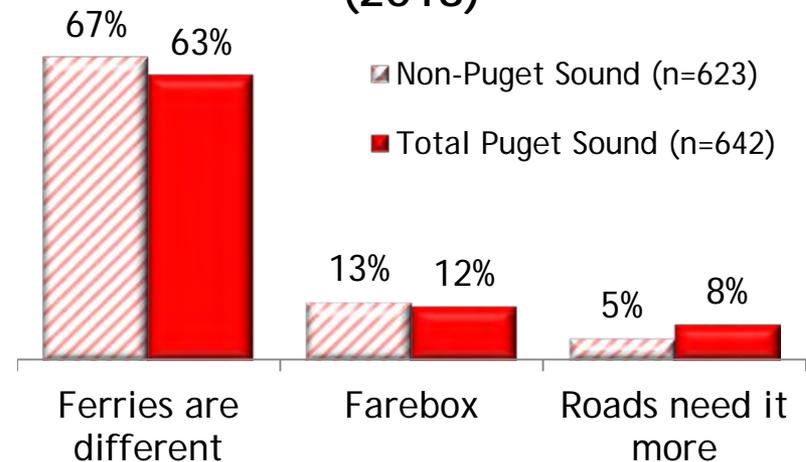


The major reason for recommending the same funding level as roads and bridges is that WSF is part of the overall transportation system in Washington and should be funded equally with roads/bridges. The major reason for recommending different funding levels is that WSF is different than general roads/bridges as it carries a smaller percent of the state traffic and thus roads/bridges should get higher funding priority.

### Reason for Same Funding (2018)



### Reason for Different Funding (2018)



Q23 Why do you feel that way (regarding their answer to should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways)?

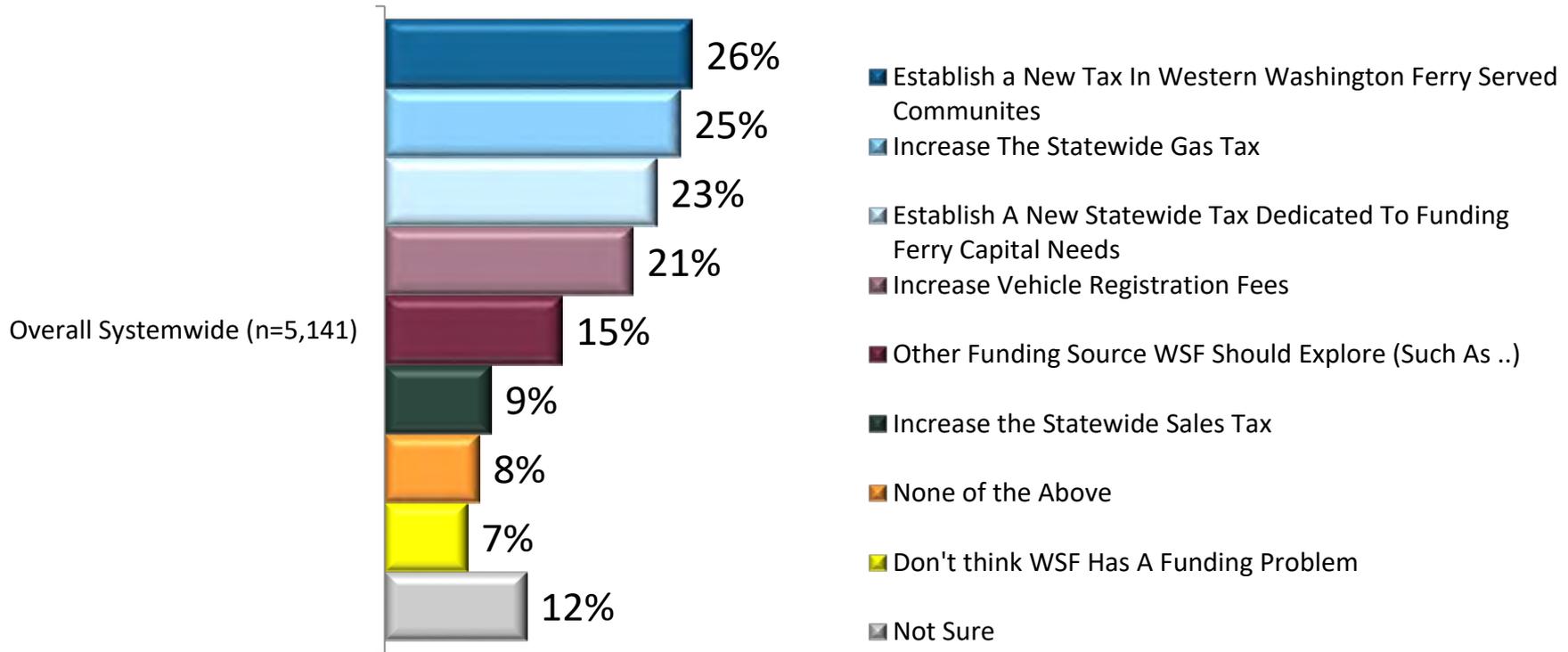
# Capital Funding – FROG Members

## Attitudes Towards WSF Capital Funding



When asked to recommend a funding source for long-term capital needs, “establishing a new tax in Western WA ferry served communities” and “increase the statewide gas tax” received the most mentions. They are followed by “establish a new statewide tax dedicated to funding ferry capital needs” and “increase vehicle registration fees.” Seven percent (7%) do not feel WSF has a funding problem and 12% are not sure.

### Funding Source Recommended to be Explored



Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you **recommend be explored and possibly considered to fund the long-term capital needs** of the ferry system? (Please check as many as you would like to see used)

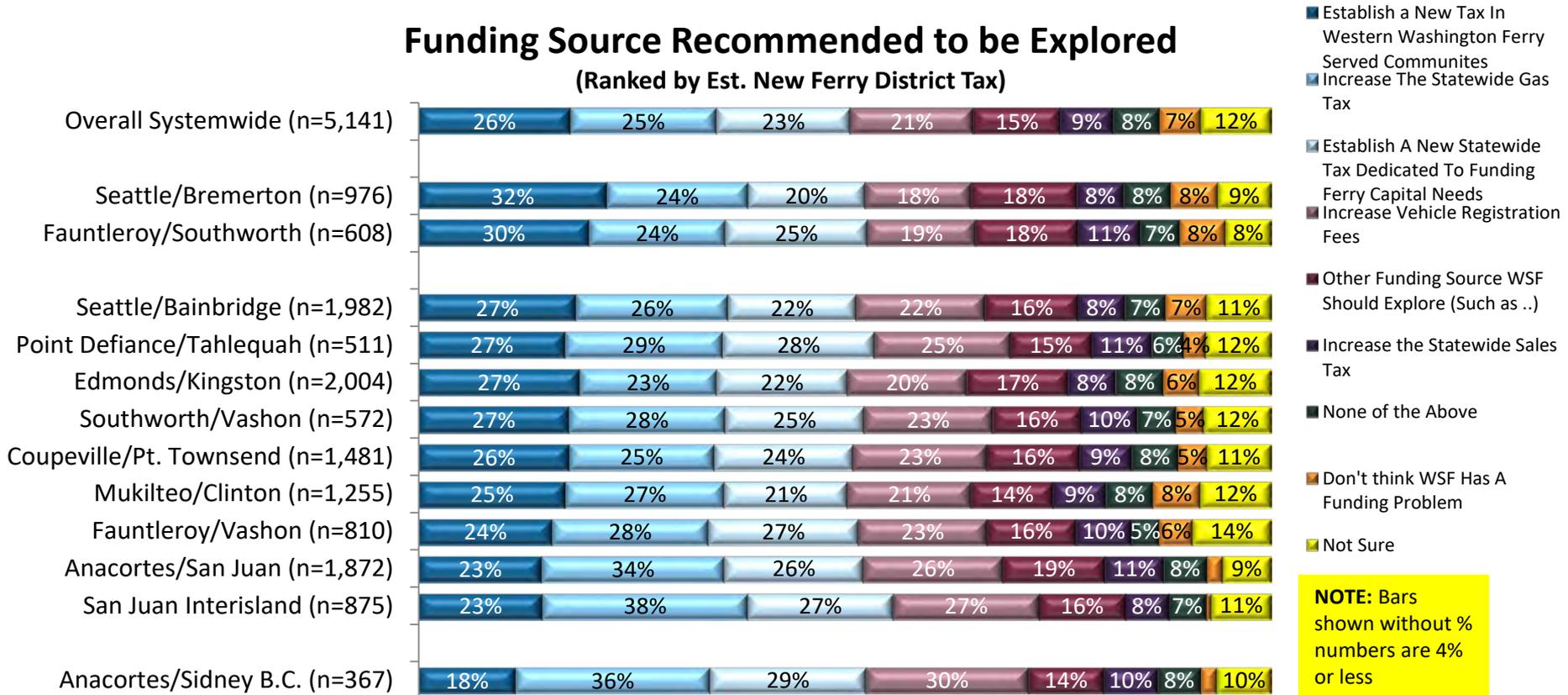
# Capital Funding – FROG Members

## Attitudes Towards WSF Capital Funding



*Establishing a new tax in Western WA ferry served communities tends to be mentioned more often by Seattle/Bremerton as well as Fautleroy/Southworth riders and least often by Anacortes/Sidney B.C. riders.*

### Funding Source Recommended to be Explored (Ranked by Est. New Ferry District Tax)



*Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you recommend be explored and possibly considered to fund the long-term capital needs of the ferry system? (Please check as many as you would like to see used)*

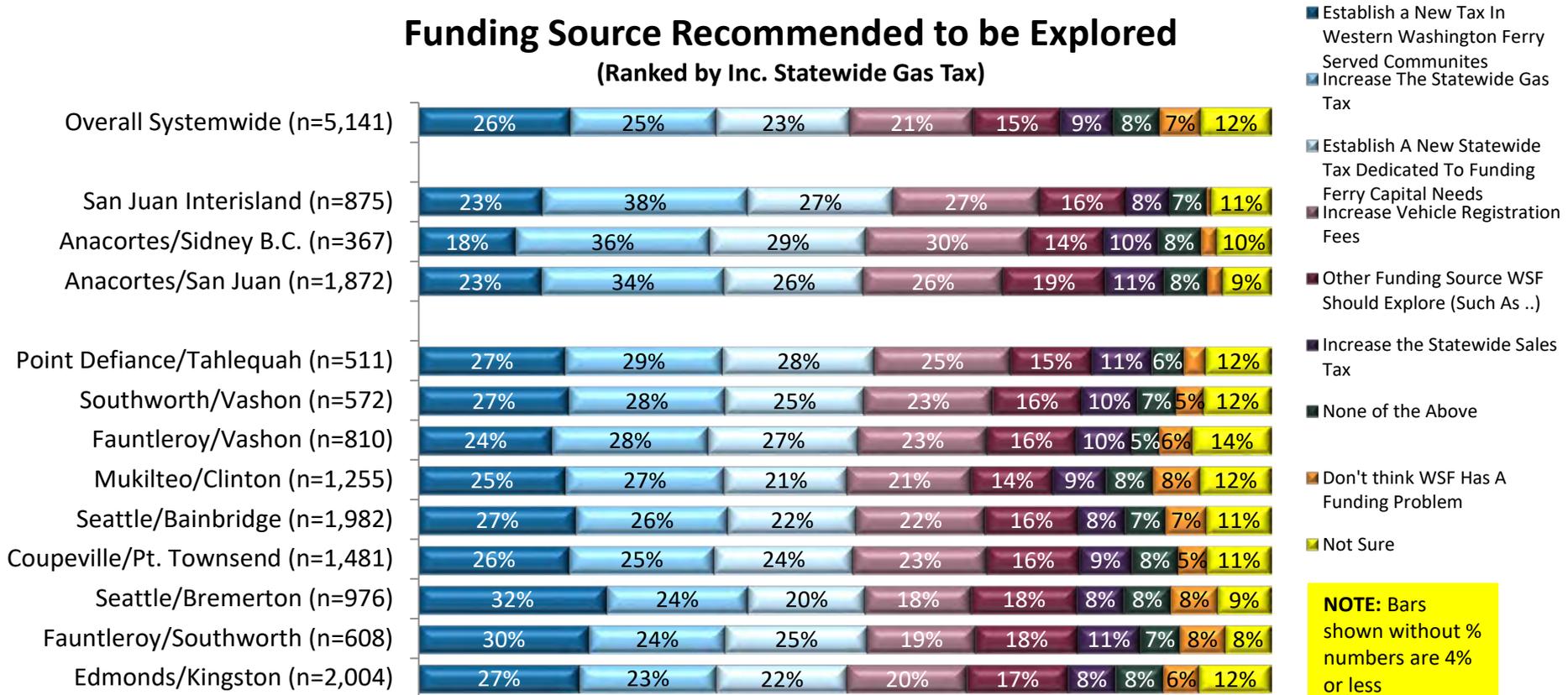
# Capital Funding – FROG Members

## Attitudes Towards WSF Capital Funding



Increasing the statewide gas tax tends to be mentioned more often by the San Juan routes.

### Funding Source Recommended to be Explored (Ranked by Inc. Statewide Gas Tax)



Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you recommend be explored and possibly considered to fund the long-term capital needs of the ferry system? (Please check as many as you would like to see used)

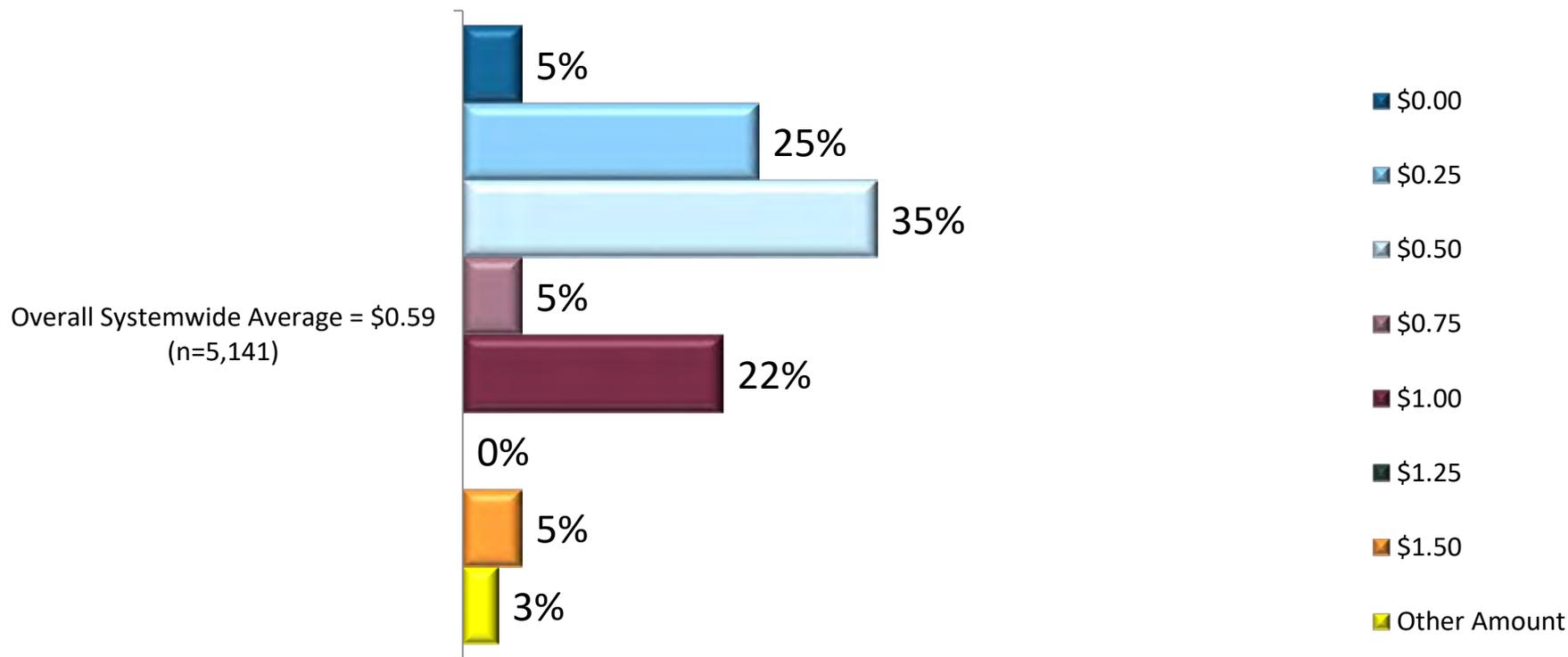
# Capital Funding – FROG Members

## Attitudes Towards WSF Surcharge For New Vessels



Riders on average said \$0.59 when asked how much more they would be willing to pay for the surcharge for new vessels, provided the funds continue to be dedicated to new ferries. Five percent said zero while five percent said \$1.50 with twenty-two percent saying \$1.00. The largest group said fifty cents.

### Willing to Pay Per Ticket If Dedicated to New Ferries



Q5 Currently a surcharge of \$0.25 per ticket is dedicated to help fund new ferries. How much more would you be willing to pay, provided this funding continues to be dedicated to new ferries?

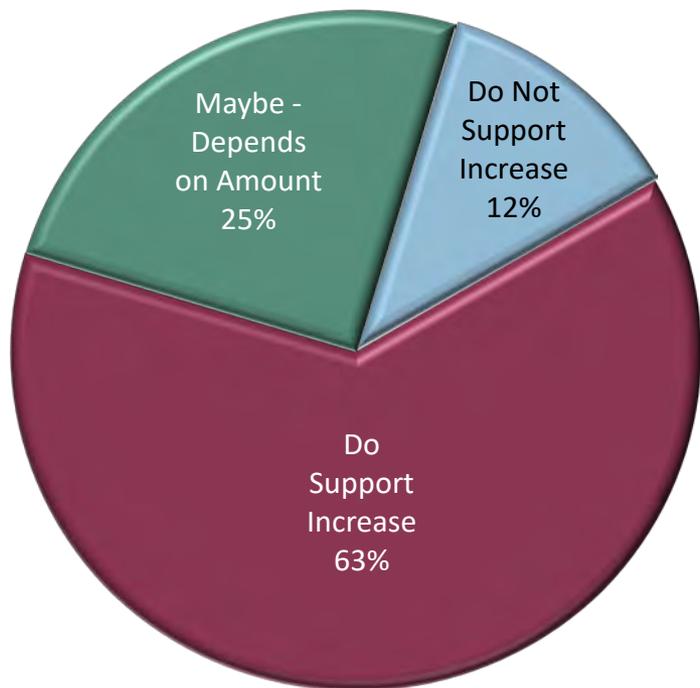
# Capital Funding – FROG Members

## Attitudes Towards WSF Surcharge For New Vessels



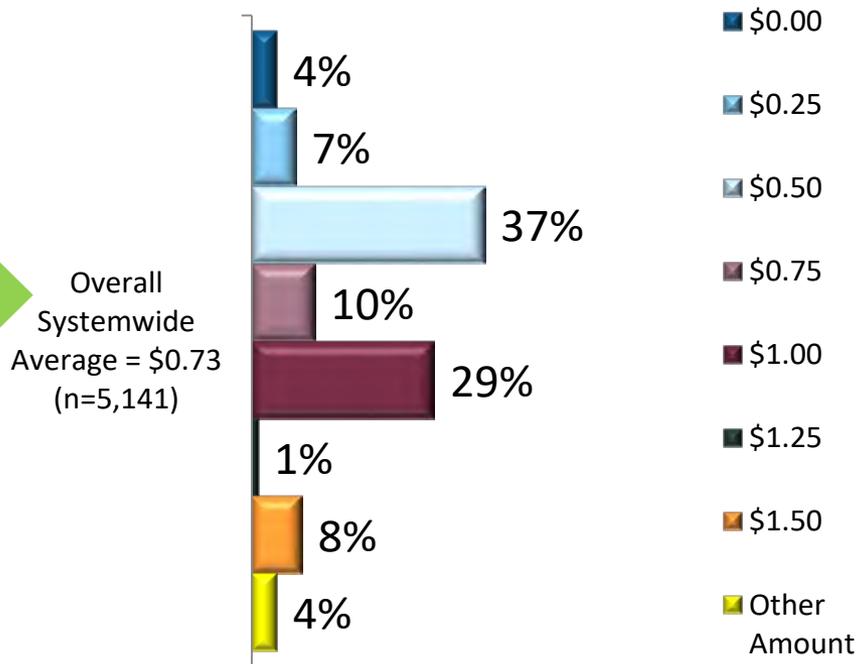
Six in ten (63%) support increasing the surcharge when given a short description of what the \$0.25 raises plus what the cost of a new 144-car ferry is. In contrast 12% said no and 25% said it depended on the amount of the surcharge. This time when given the same surcharge fee points, the average increased to \$0.73 from the pre-description \$0.59 average. Most notable, the \$0.00 and \$0.25 levels dropped while all other amounts increased from their pre-statement figures.

**Level of Support for Surcharge**  
(n=5,141)



Everyone Asked

**Willing to Pay Per Ticket After Reading Statement**



Q6a At \$.025 per ticket the surcharge will raise about \$4 million per year. The cost of a new 144-car ferry costs about \$150 million. Knowing this, would you support the surcharge of \$0.25 per ticket being increased if it continues to be dedicated to new ferries? Q6b Up to what amount could you support the surcharge being increased to?



# Suggested Service Improvements

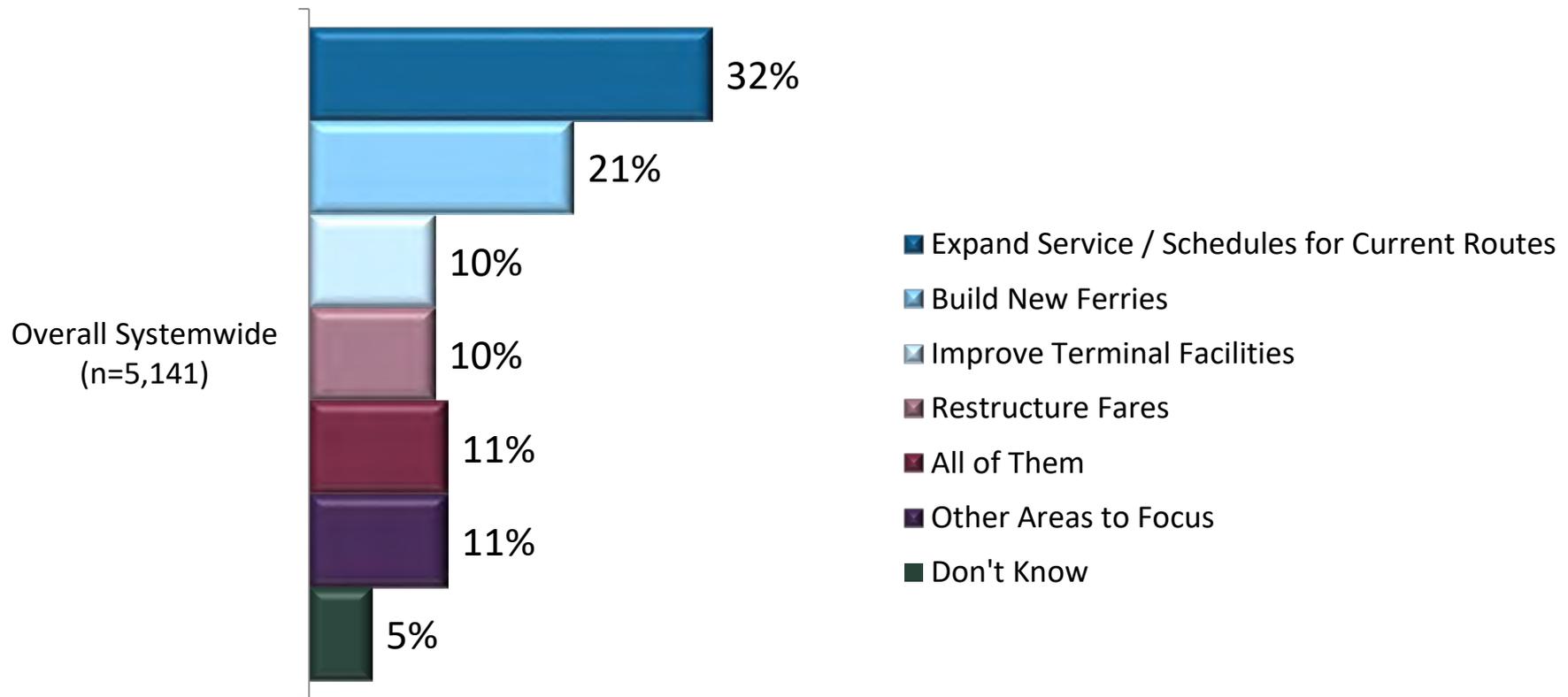
# Suggested Service Improvements

## Four General Areas WSF Should Concentrate On



A total of 5,141 WSF riders were asked which of four issues/projects they felt WSF should focus on to improve its service. One in three (32%) said expand service / schedules for current routes followed by build new ferries (21%). Improve terminal facilities and restructure fares were cited by one in ten as were the responses of focusing on all of them and other suggested areas to focus on.

### Four General Areas WSF Should Concentrate On – Systemwide



Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

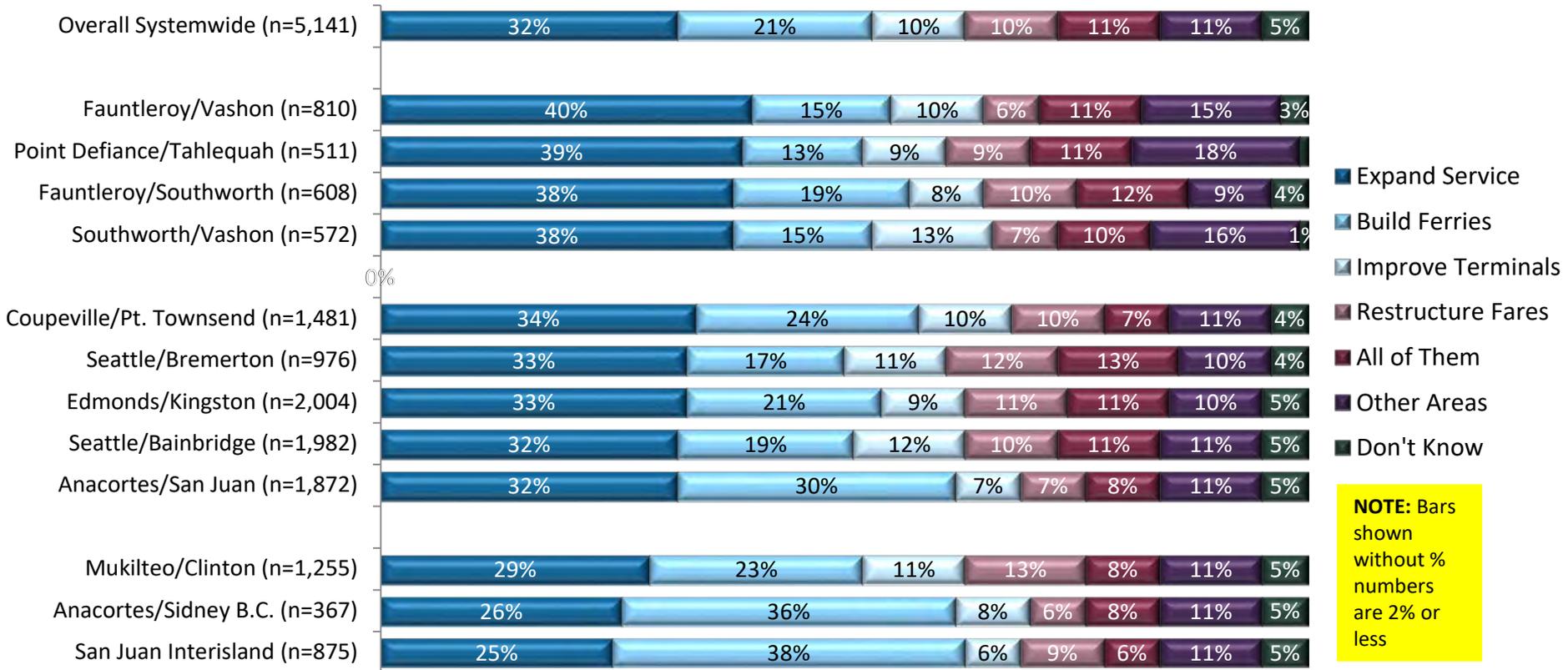
# Suggested Service Improvements

## Four General Areas WSF Should Concentrate On



When sorted by the expand service option, the four Vashon routes (40% to 38%) exceed the systemwide average of 32%. Least likely to mention expand service is Anacortes/Sidney B.C. (26%) and San Juan Interisland (25%) with the balance of the routes being about average (34% to 29%).

### Four General Areas WSF Should Concentrate On – By Route (Ranked by Expand Service)



Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

# Suggested Service Improvements

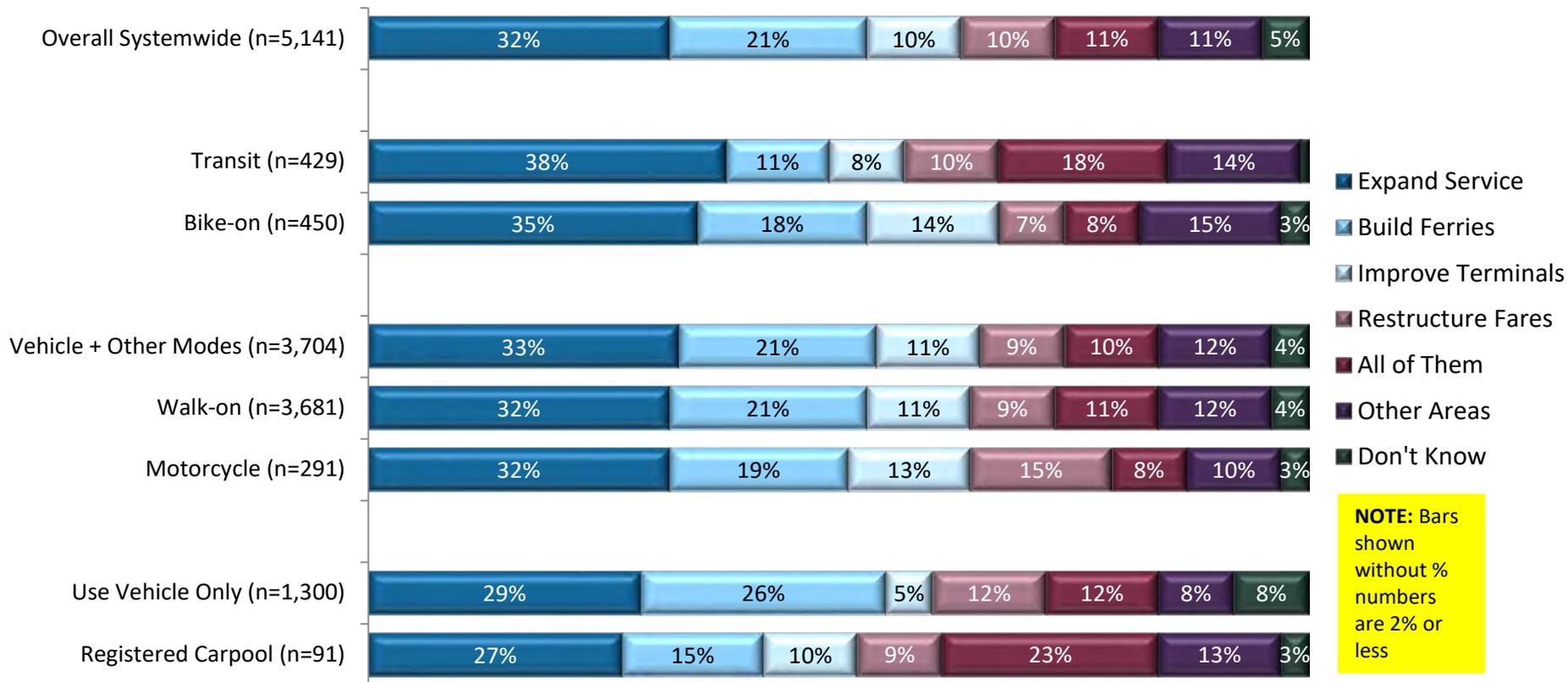
## Four General Areas WSF Should Concentrate On



When the results are broken out by the mode riders have used in the last 12 months, the data finds transit riders (38%) and bike-on riders (35%) want expanded service more than average (32%) and more than those that only drive onto a ferry in a vehicle (29%) or registered carpool (27%).

### Four General Areas WSF Should Concentrate On – By Mode

(Ranked by Expand Service)



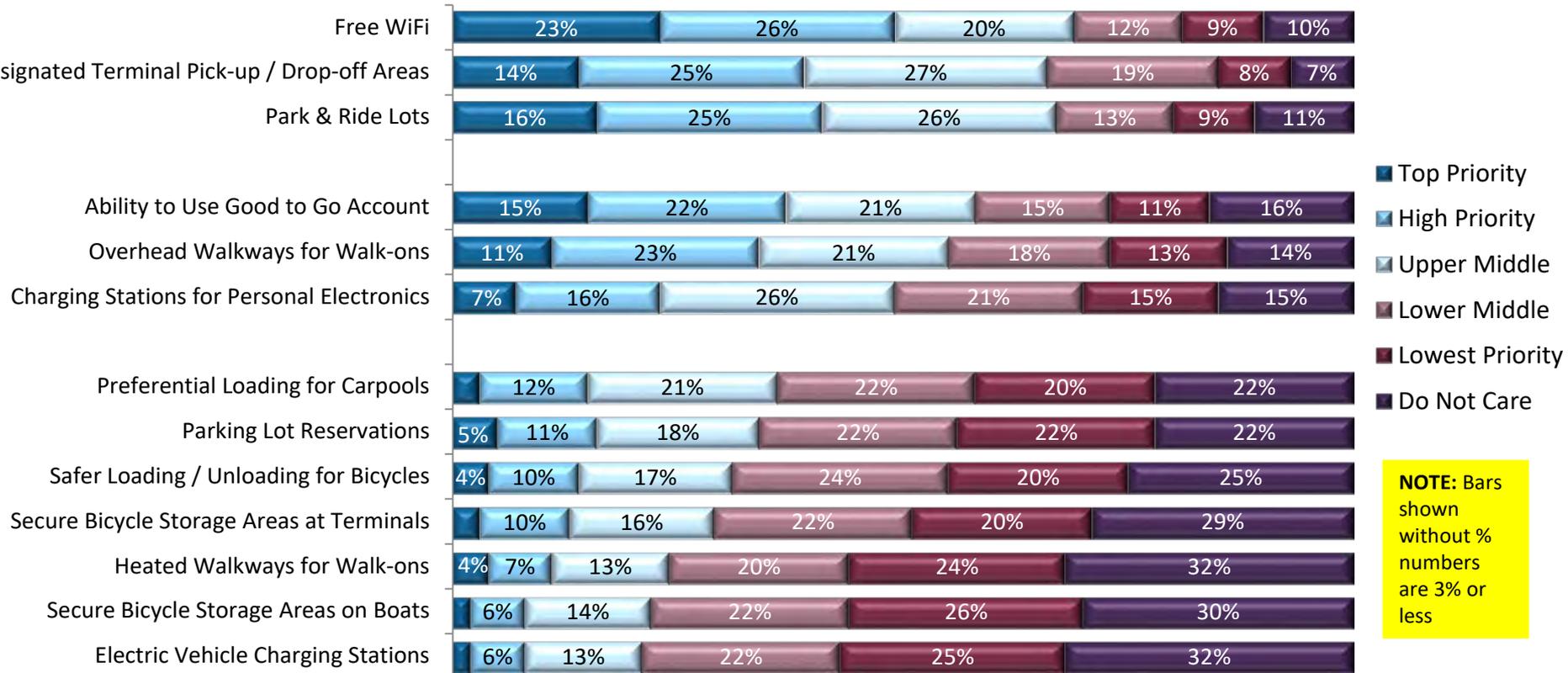
Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

# Suggested Service Improvements Potential Amenities Desired



The 5,141 riders ranked thirteen potential amenities from top priority to do not care about it. The top three highest ranked amenities were “free Wi-Fi,” “designated terminal pickup / drop-off area,” and “park & ride lots.” The next group were “ability to use Good to Go account,” “overhead walkways for walk-ons,” and “charging stations for personal electronics.”

## Ranking of Potential Amenities - By Average Priority Statewide (n=5,141)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

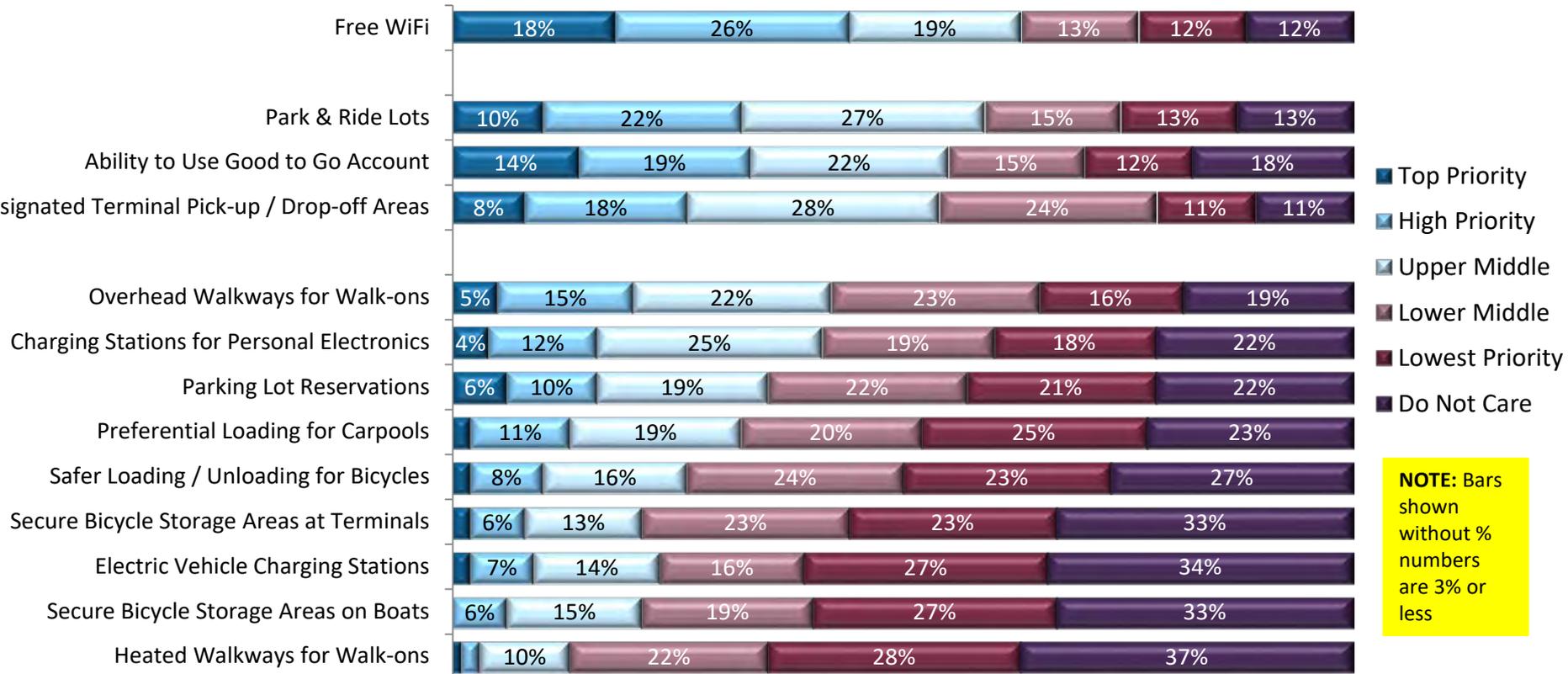
# Suggested Service Improvements Potential Amenities Desired



When the amenities are broken out by riders who only drive onto a ferry, the top tier amenity is “free Wi-Fi.” Second tier amenities are “park & ride lots,” ability to use Good to Go account,” and “designated terminal pickup and drop-off areas.”

## Use Vehicle Only - Ranking of Amenities By Average Priority

(n=1,300)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

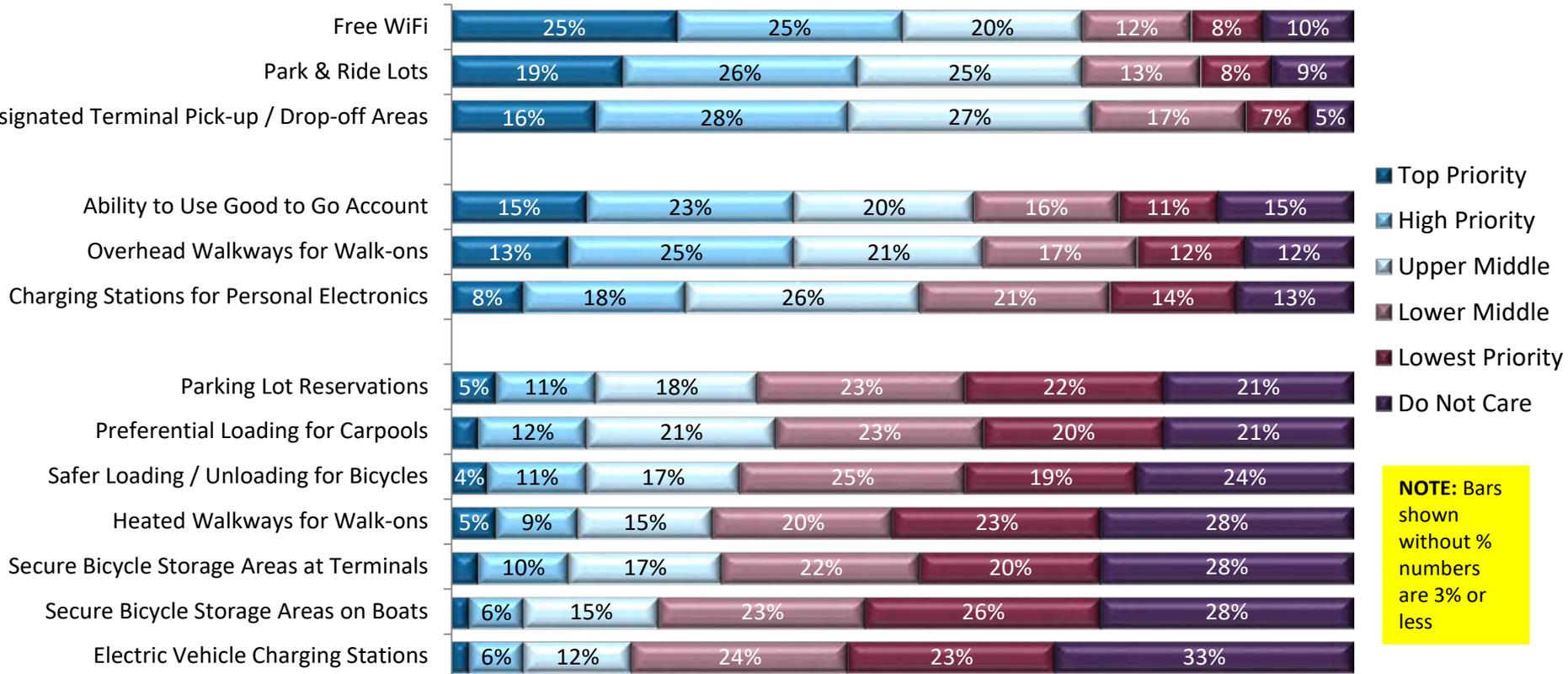
# Suggested Service Improvements Potential Amenities Desired



The top tier desired amenities for walk-on riders are “free Wi-Fi,” “park & ride lots,” and “designated terminal pickup and drop-off areas.” Second tier amenities are “ability to use Good to Go account,” “overhead walkways for walk-ons” and “charging stations for personal electronics.”

## Walkers - Ranking of Amenities By Average Priority

(n=3,681)



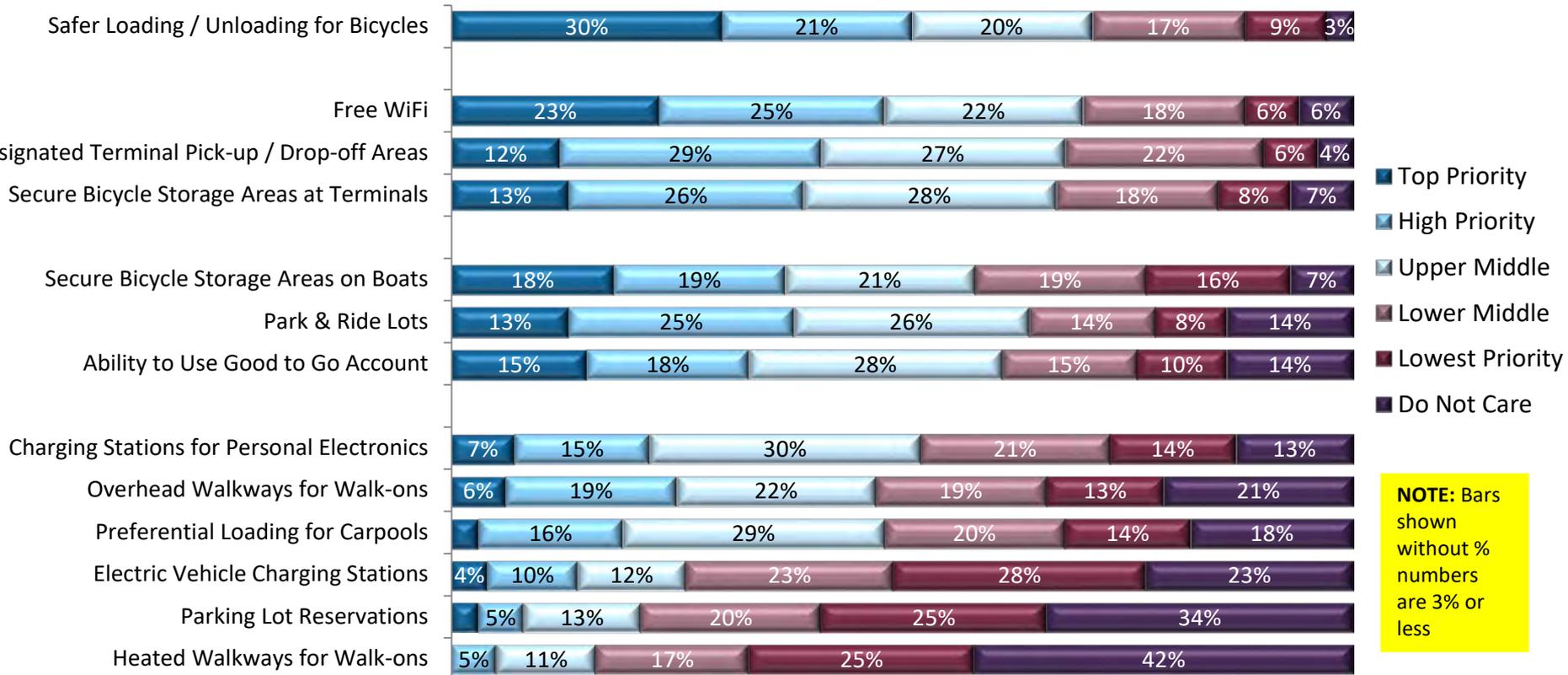
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Suggested Service Improvements Potential Amenities Desired



The top tier desired amenity for those bike-on riders is “safer loading / unloading for bicycles.” Second tier is “free Wi-Fi,” “designated terminal pickup and drop-off areas,” and “secure bicycle storage areas at terminal.” Third tier amenities are “secure bicycle storage areas on boats,” “park and ride lots,” and “ability to use Good to Go account.”

## Bike Riders - Ranking of Amenities By Average Priority (n=450)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

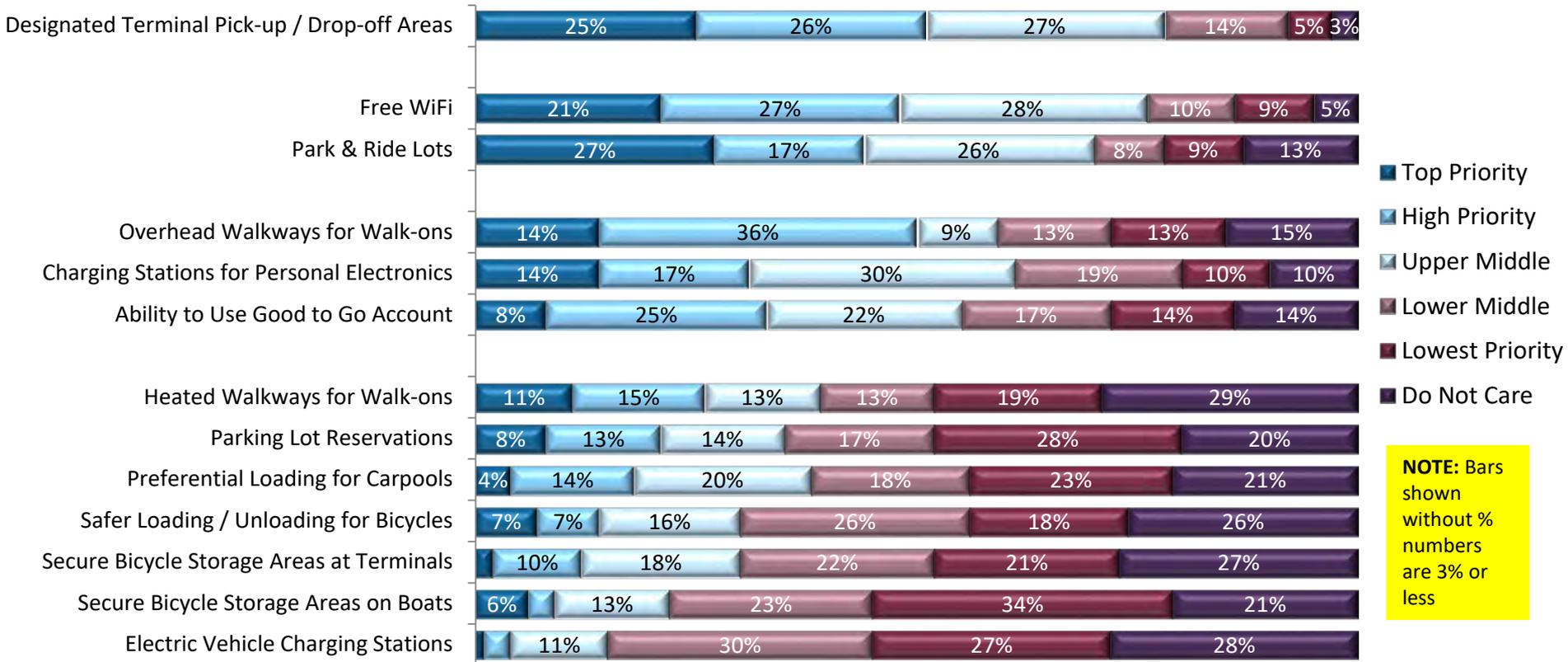
# Suggested Service Improvements Potential Amenities Desired



*The top tier desired amenity for those transit riders is “designated terminal pickup / drop-off areas.” Second tier amenities are “free Wi-Fi” and “park & ride lots.” Third tier amenities are “overhead walkways for walk-ons,” “charging stations for personal electronics,” and “ability to use Good to Go account.”*

## Transit Riders - Ranking of Amenities By Average Priority

(n=429)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.



# Encouragement of Walk-on Behavior

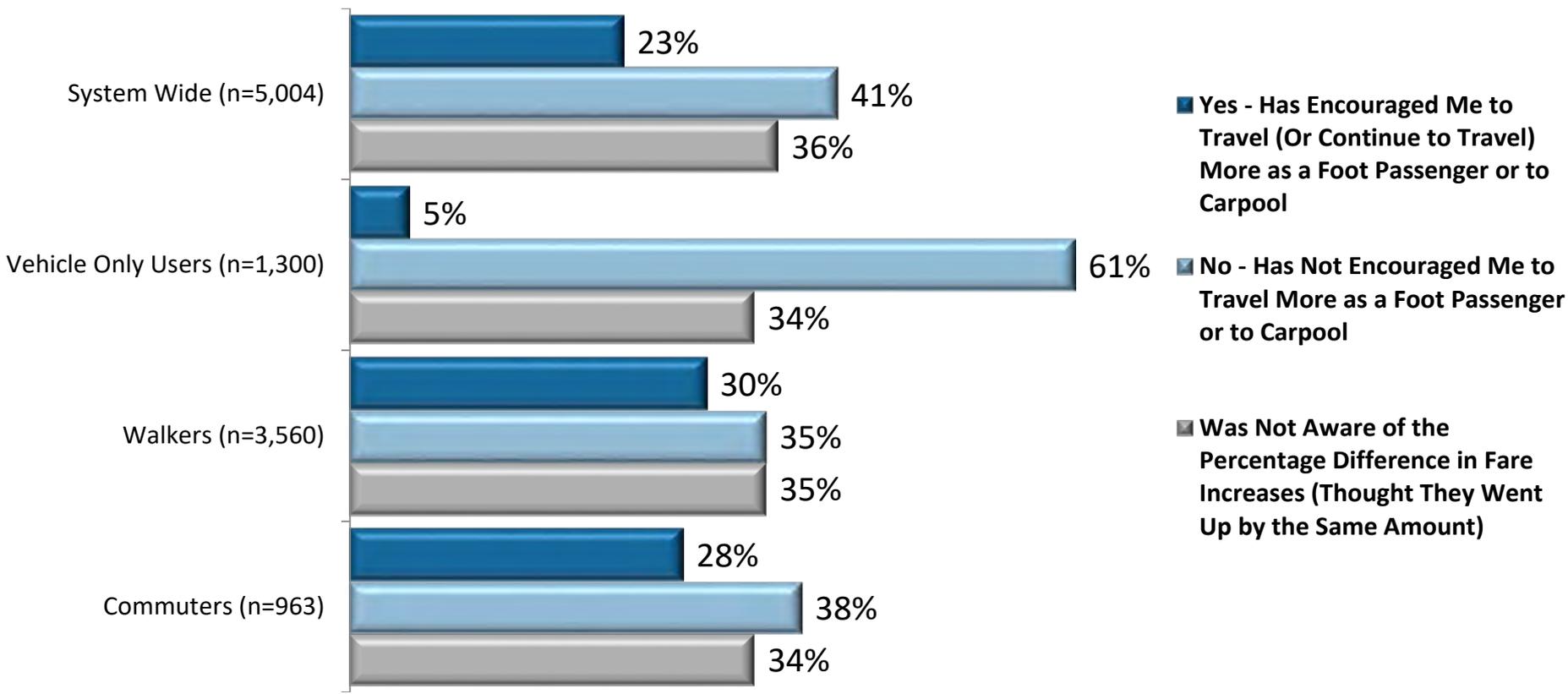
# Encouraging Walk-on Behavior

## Passenger to Vehicle Increase Differential



One in four riders systemwide feel the impact of a lower passenger to vehicle increase fare percentage has encouraged walk-on behavior. In comparison 5% of riders who only drive on said it did while three in ten walkers and commuters said it did. About one in three systemwide, and in each group, were not aware of the percentage difference in fare increases.

### Impact of Lower Passenger to Vehicle Increase Fare Percentage on Encouraging Walk-on Behavior



Q19 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?

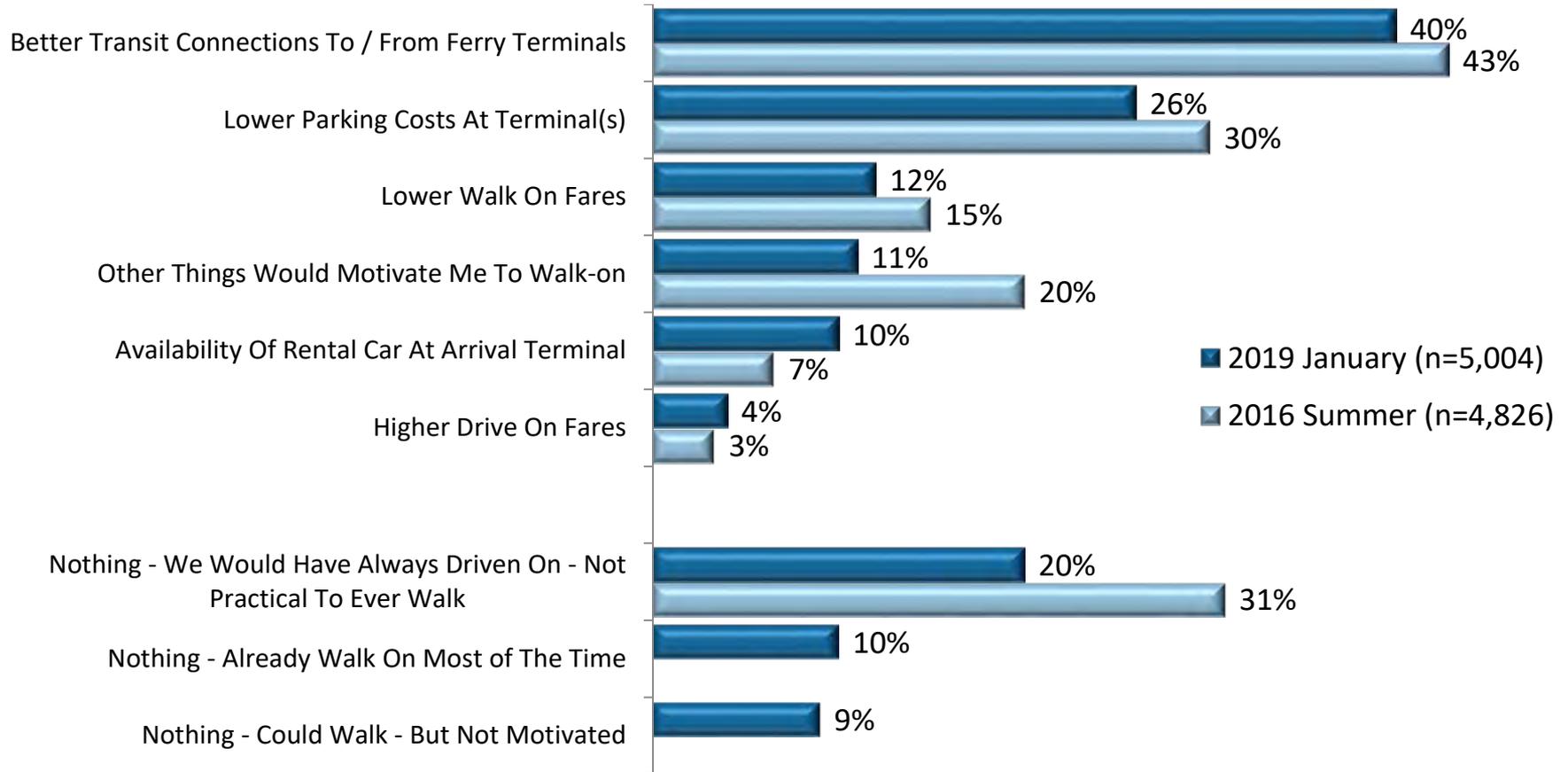
# Encouraging Walk-on Behavior

## General Walk-on Encouragement 2016/2019 Comparison



*Better transit connections to and from ferry terminals was the top mentioned method of encouraging walk-ons by respondents both in 2019 and in 2016 when the question was first asked. Similar to 2016, the second most mentioned encouragement for walking on was “lower parking costs at terminal(s).”*

### Encourage Walk-on Behavior – From General List of Options



Q15 What, if anything, would encourage you to walk on rather than drive on?

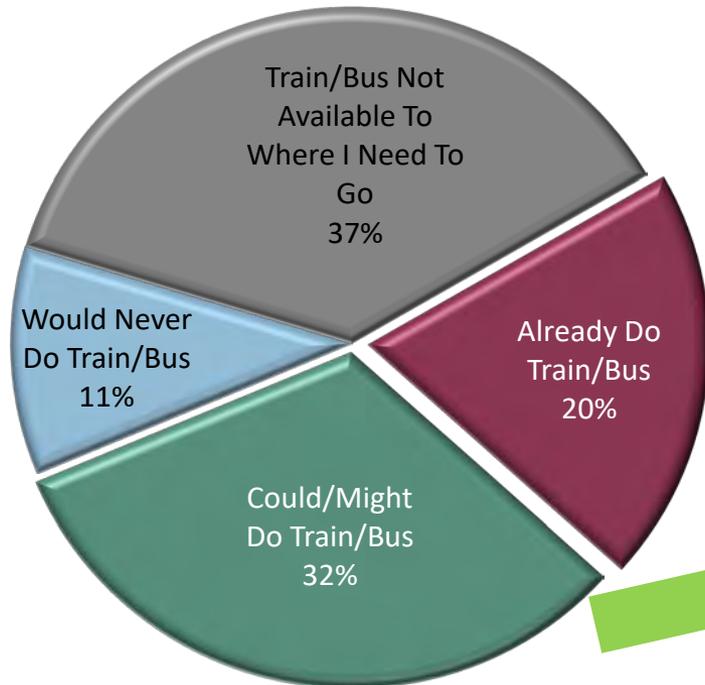
# Encouraging Walk-on Behavior

## Ferry Schedule Match-up With Train / Bus Connections

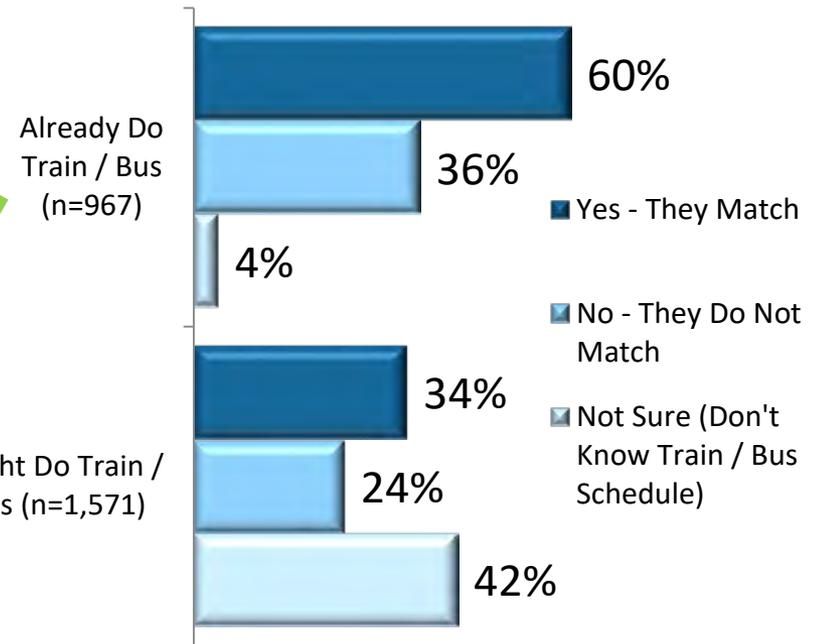


About half of all riders (52%) use or could use a train / bus in combination with the ferries. Over four in ten (41%) of those that already do use a train / bus do not feel the schedule adequately matches up with their train / bus connection (37%) or are unsure (4%). In comparison, 66% of those that might do a train / bus either feel it does not match up (24%) or are unsure (42%).

**Make Either a Train and/or Bus Connection As Part Of Your Trip**  
(n=5,141)



**Current Ferry Schedule Adequately Match Up With Train/Bus Connection**



Q20 Do you or could you **make either a train and/or bus connection** as part of your trip on the ferry? Would you say: 1) Already Do Train/Bus Today As Part Of My Ferry Travel, 2) Could/Might Do Train/Bus in The Future As Part Of My Ferry Travel, 3) I Would Never Do Train/Bus As Part Of My Ferry Travel (But It Is Available), or 4) Can't Do Train/Bus As They Are Not Available To Where I Need To Go? Q21 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**?

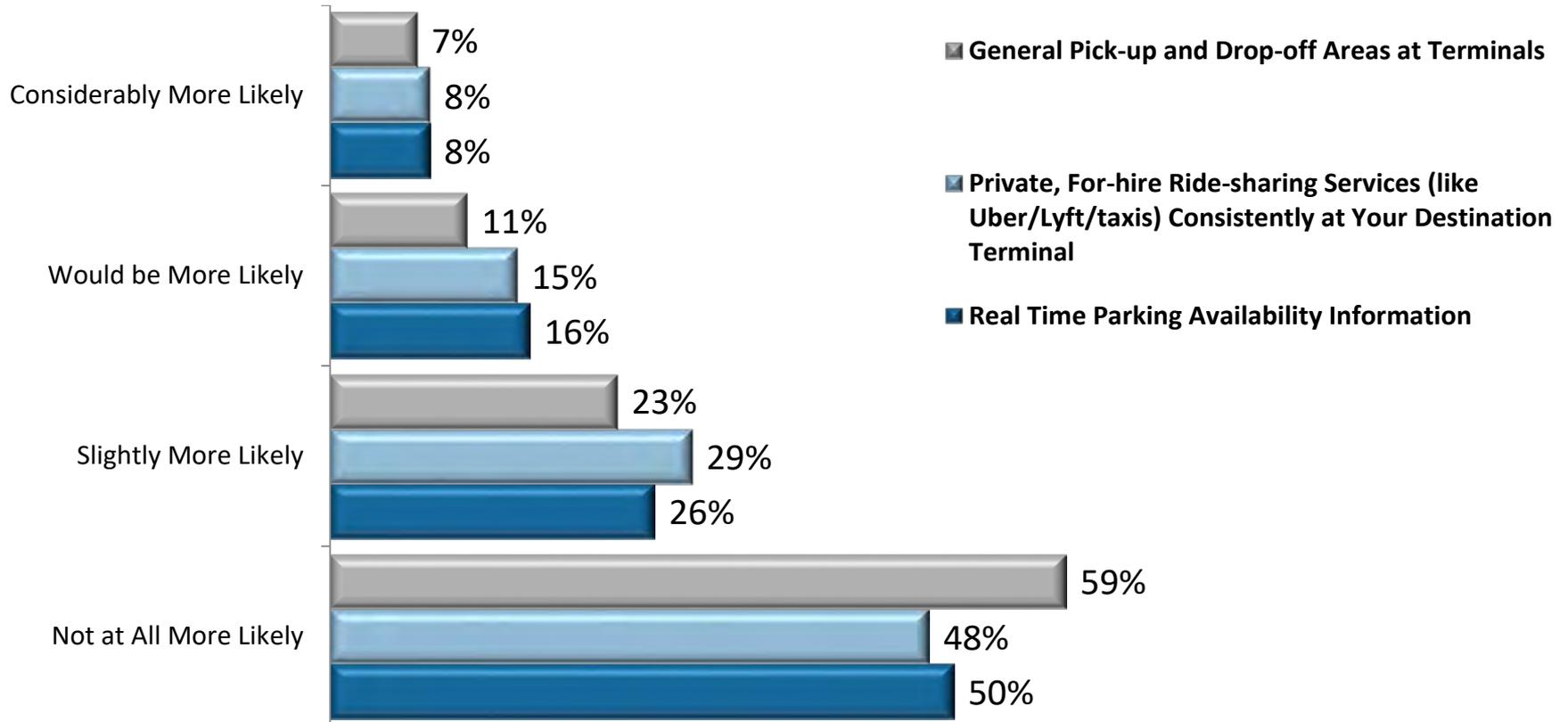
# Encouraging Walk-on Behavior

## Three Specific Terminal Options



Having private, for-hire ride-share services consistently at your destination terminal and real time parking availability information made about half of all riders who drive a vehicle onto the ferries more likely to consider walking on.

### Encourage Walk-on Behavior By Improving/Providing ... (All Riders Who Drove On at Least Once n=5,004)



Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

# Encouraging Walk-on Behavior

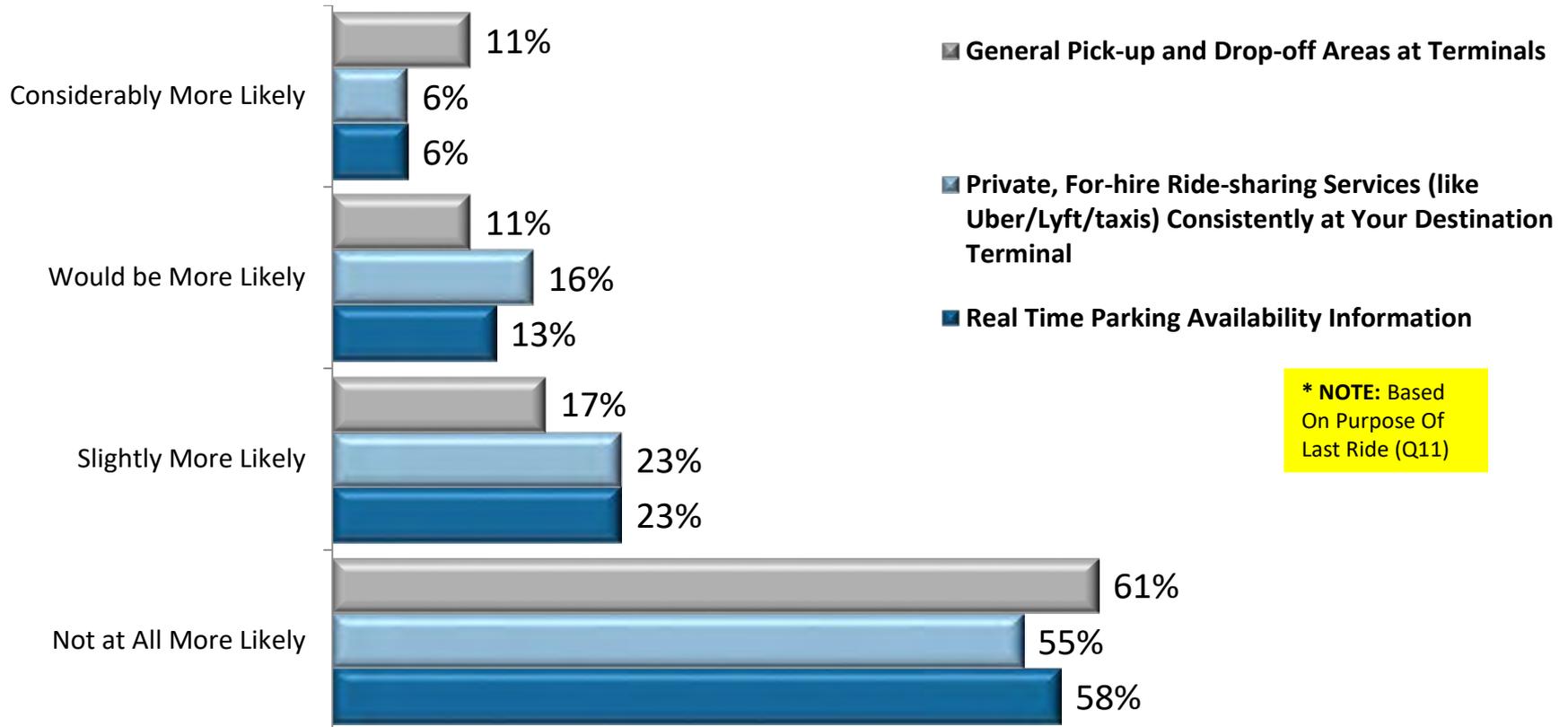
## Three Specific Terminal Options



*Commuter riders who drove on at least once are less likely to be encouraged to walk-on than the general ridership, particularly for “private for-hire ride-sharing services consistently at your destination terminal” and “real time parking availability information.”*

### Encourage Walk-on Behavior By Improving/Providing ...

**(All Commuter Riders\* Who Drove On at Least Once n=963)**



*Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)*



# Passenger Only Ferry Service

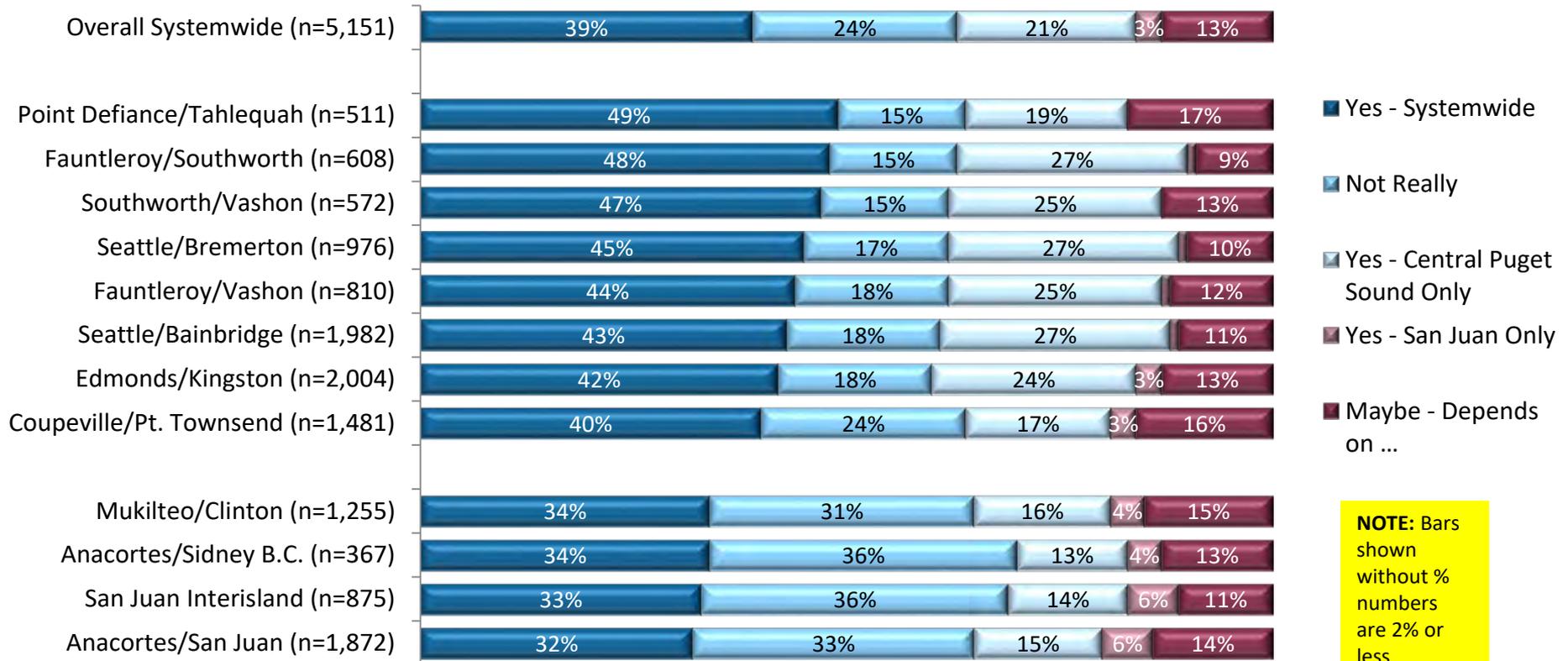
# Passenger Only Ferry Service



When asked if they would like to see passenger only ferry service expanded, four in ten (39%) say “yes and that it should be systemwide.” Systemwide desire is highest in the Point Defiance/Tahlequah (49%), Fautleroy/Southworth (48%), and Southworth/Vashon routes (47%). Yes for just central Puget Sound is highest among riders on Fautleroy/Southworth (27%), Seattle/Bremerton (27%), and Seattle/Bainbridge (27%).

## Expand Passenger Only Ferry Service

(Sorted by Yes – Systemwide Response)



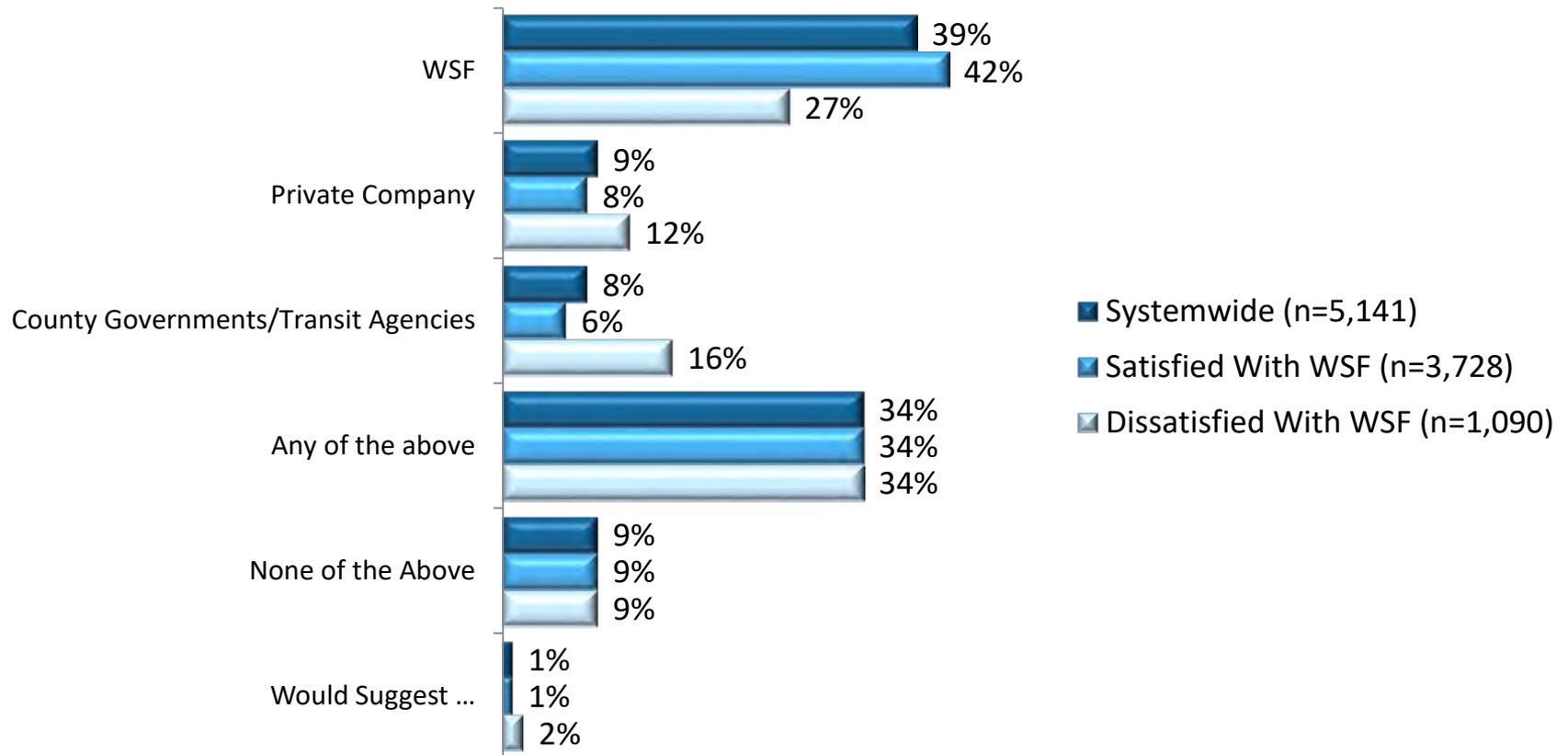
**NOTE:** Bars shown without % numbers are 2% or less

Q22 Would you like to see **passenger only ferry service** expanded throughout the Puget Sound (including the in San Juans)?



*Four in ten (39%) say they would want WSF to operate the fleet of passenger only vessels. Those dissatisfied with WSF were more likely to mention “County Government / Transit Agencies (16%) than those satisfied with WSF (6%).*

## Most Want To Operate Passenger Only Vessels



Q23 If a fleet of passenger only vessels were added to the routes that you typically use, who would you **most want to operate them**?



## **For More Information Contact:**

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