



Washington State Transportation Commission

WSF Summer Recreational & Performance Survey

2018 Report



Washington State
Transportation Commission

Research Assurance LLC

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues. VOWS was discontinued by the legislature in 2017.

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

- Winter 2018 Customer Survey Study (target audience: commuter riders) via FROG
- Freight Survey (target audience: WSF freight customers) via executive telephone survey
- Spring Reservation Study via FROG
- General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS
- **Summer On-board Recreational Survey (target audience: Out of state riders)**
- **Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)**
- Policy Study (target audience: commuter riders) via FROG
- Winter 2018 Customer Survey Study (target audience: commuter riders) via FROG

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

- In addition to FROG panel member data, onboard in-person surveys conducted with ferry riders were also collected during the summer travel period. The onboard surveys were collected in order to reach members of the general public who are not part of FROG regarding specific recreational and ferry usage issues. Throughout this report, the data from these onboard surveys is compared to FROG panel data where applicable, and referred to as “Onboard 2018.”

Some percentages may not add up to 100% due to rounding.

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Methodology



- ▶ The following report presents the findings for the 2018 Summer Recreational Survey.
 - The summer period ran from June 24th 2018 to September 29th 2018.

- ▶ The main objective of this research is to understand from the ferry riders' perspective, their summer travel behavior, as well as their level of satisfaction with WSF summer performance on key attributes.
 - This overall objective resulted in the following areas of exploration:
 - Summer travel activity – ferry travel from June through September 2018.
 - Social and recreational – understand role of ferries in the social and recreational summer travel.
 - Customer satisfaction – measure importance and satisfaction of terminal conditions, walk-on services, loading and unloading procedures, vessel conditions, and WSF website and telephone services.
 - Demographic characteristics of ferry customers – travel patterns, WSF satisfaction and demographic data.

- ▶ A total of 4,925 ferry riders completed the Summer 2018 FROG Panel survey yielding a maximum sample variable of +/- 1.4% at the 95% confidence level.
 - Ferry riders completed a web survey which started September 30th and ended on October 21st 2018.

- ▶ A total of 7,810 ferry riders were intercepted onboard and 704 completed the recreational travel portion of the Summer 2018 onboard intercept survey yielding a maximum sample variable for the recreational travel portion of +/- 3.7% at the 95% confidence level.
 - Ferry riders completed a short iPad based survey starting July 12, 2018 and ending on August 11, 2018.

- ▶ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken.
 - Data was weighted by route/boarding mode/ticket type according to WSF actual traffic count for the summer period.
 - F

Executive Summary



Summer Rider Performance Assessment:

- ▶ 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% 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%), Fautleroy/Vashon (44%), and Point Defiance/Tahlequah (39%) routes. Only 6% of onboard survey respondents said they were dissatisfied.
- ▶ The percentage of 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/Fautleroy, Fautleroy/Vashon, and San Juan Interisland.
- ▶ Overall satisfaction across all four attributes tested remains positive. Total dissatisfaction remains consistent with summer 2016 at about 10% for “easy loading/unloading,” “clear directions,” and “well maintained vessels” but has increased sharply for “terminal comfort” (12 percentage points increase in dissatisfaction – now at 28%).
- ▶ Dissatisfaction with terminals’ 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.
- ▶ Dissatisfaction with “WSF loading crews provide clear directions” is highest on Point Defiance/Tahlequah (24%), Fautleroy/Vashon (20%), and Interisland (25%) routes.

Executive Summary



Website Performance Assessment:

- ▶ 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).
- ▶ The ability to find information (48%) and hard to book or change reservations (24%) and inaccurate information (24%) were the top mentioned reasons for their website dissatisfaction.

Customer Service by Phone Performance Assessment:

- ▶ 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.
- ▶ No answer or long wait times (38%), bad employees (32%), and issues around reservations (17%) topped the list of phone complaints among people who are dissatisfied.

Executive Summary



Recreational and Social Travel Pattern

- ▶ 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.
- ▶ 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%).
- ▶ Out and back on the same route is the most popular crossing for both panel (80%) and onboard (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) having the shortest.
- ▶ Ferry fares as a percent of total recreational/social trip cost is significantly higher for FROG panel members than for non-FROG respondents (those recreational riders intercepted on-board). Importantly, the ferry fare as a percentage of the total trip costs has declined since 2016 for both panel members and onboard riders.
- ▶ 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.



Recreational & Social Travel During Summer Period

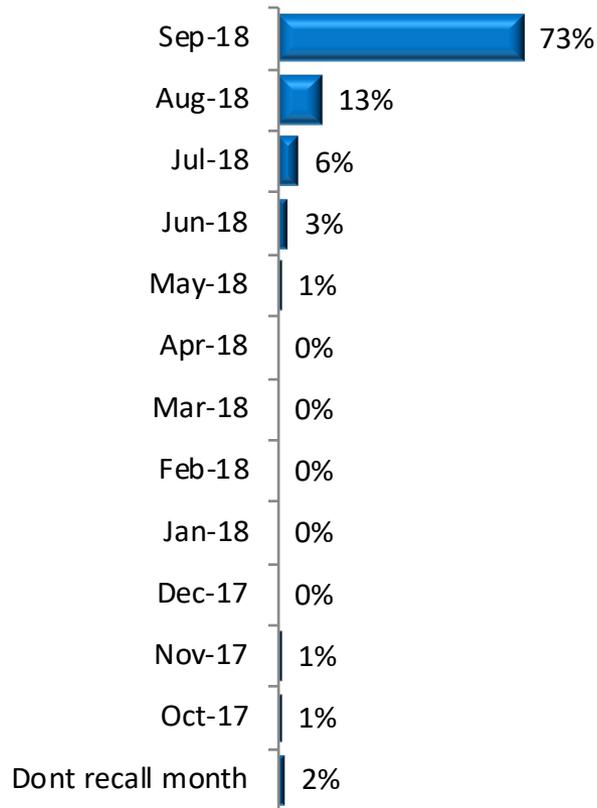
Last Recreational/Social Trip



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

n=4,529



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?

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%
Bainbridge	66%	Bremerton	67%	Tahlequah	66%	Kingston	57%	Vashon	58%	Southworth	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%	Coupeville	56%	Mukilteo	34%	Orcas	29%	Orcas	55%	Anacortes	65%
Vashon	71%	Pt Townsend	44%	Clinton	66%	Shaw	1%	Shaw	0%	Sidney BC	25%
						Lopez	11%	Lopez	20%	Friday Harbor	11%
						Friday Harbor	26%	Friday Harbor	25%		
						Anacortes	33%				

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

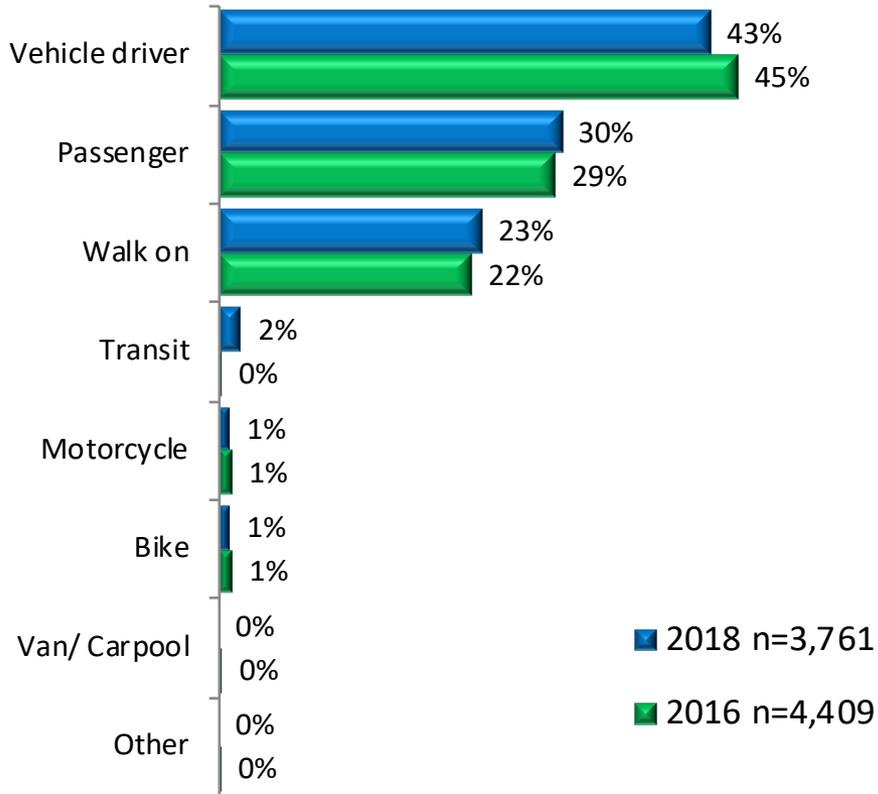
Boarding Method



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%).

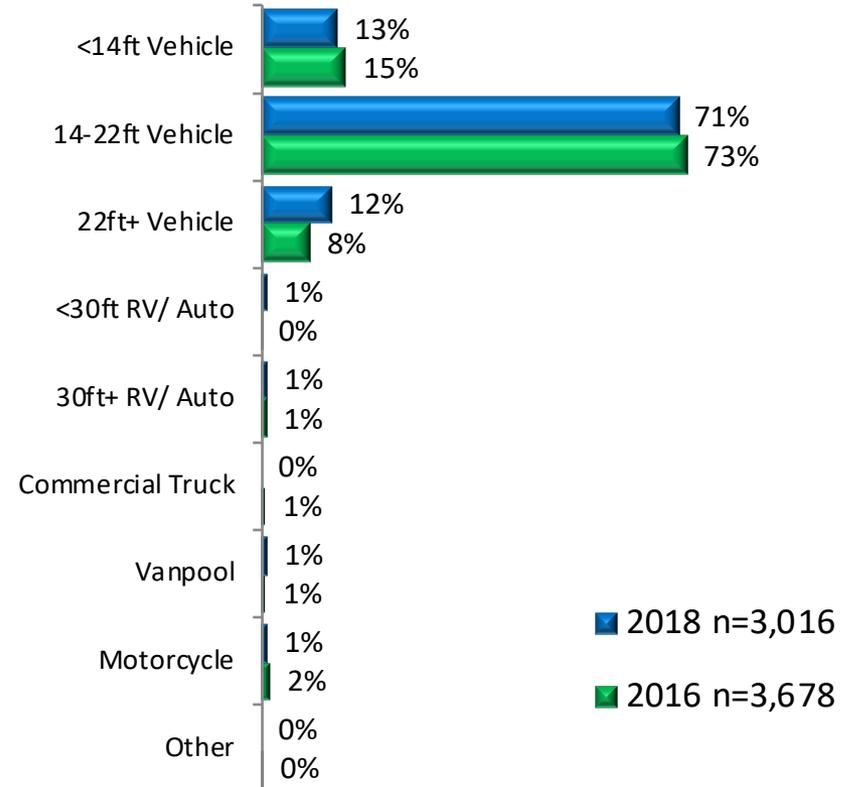
Boarding Method

Among FROG panel recreational riders



Vehicle Type

Among FROG panel recreational riders



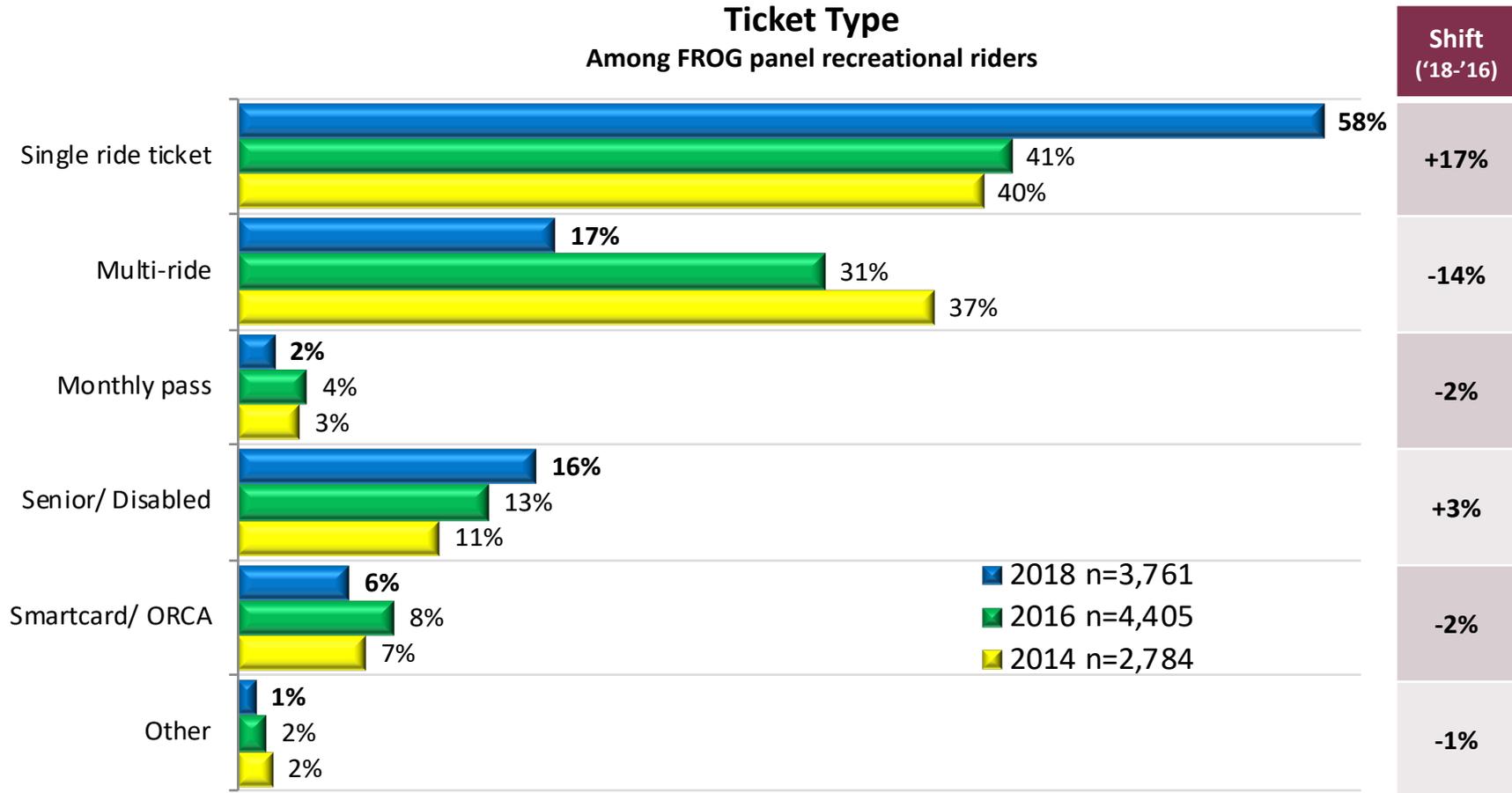
Q5. How did you board your last ferry ride? (Multiple Response)

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

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.



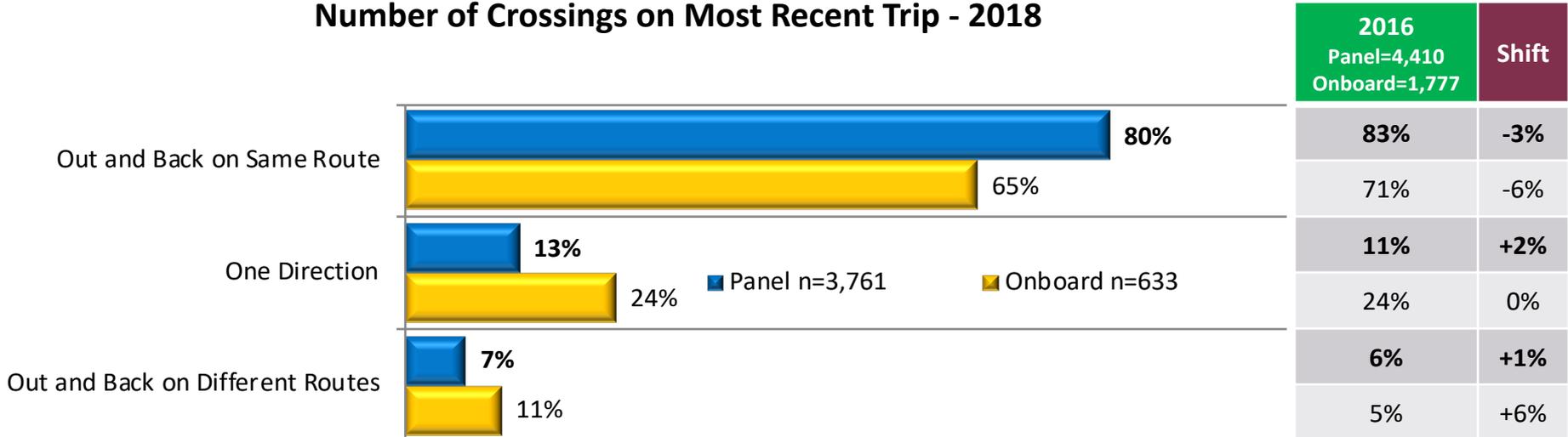
Q8. On what kind of ticket were you travelling?

Crossings and Trip Duration



Out and back on the same route is the most popular crossing for both panel and onboard recreational riders in both 2018 and 2016. Anacortes/San Juan (5.3 days) and Anacortes/Sidney (5.1 days) continue to have the longest mean trip duration with Seattle/Bremerton (1.5 days) 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.											

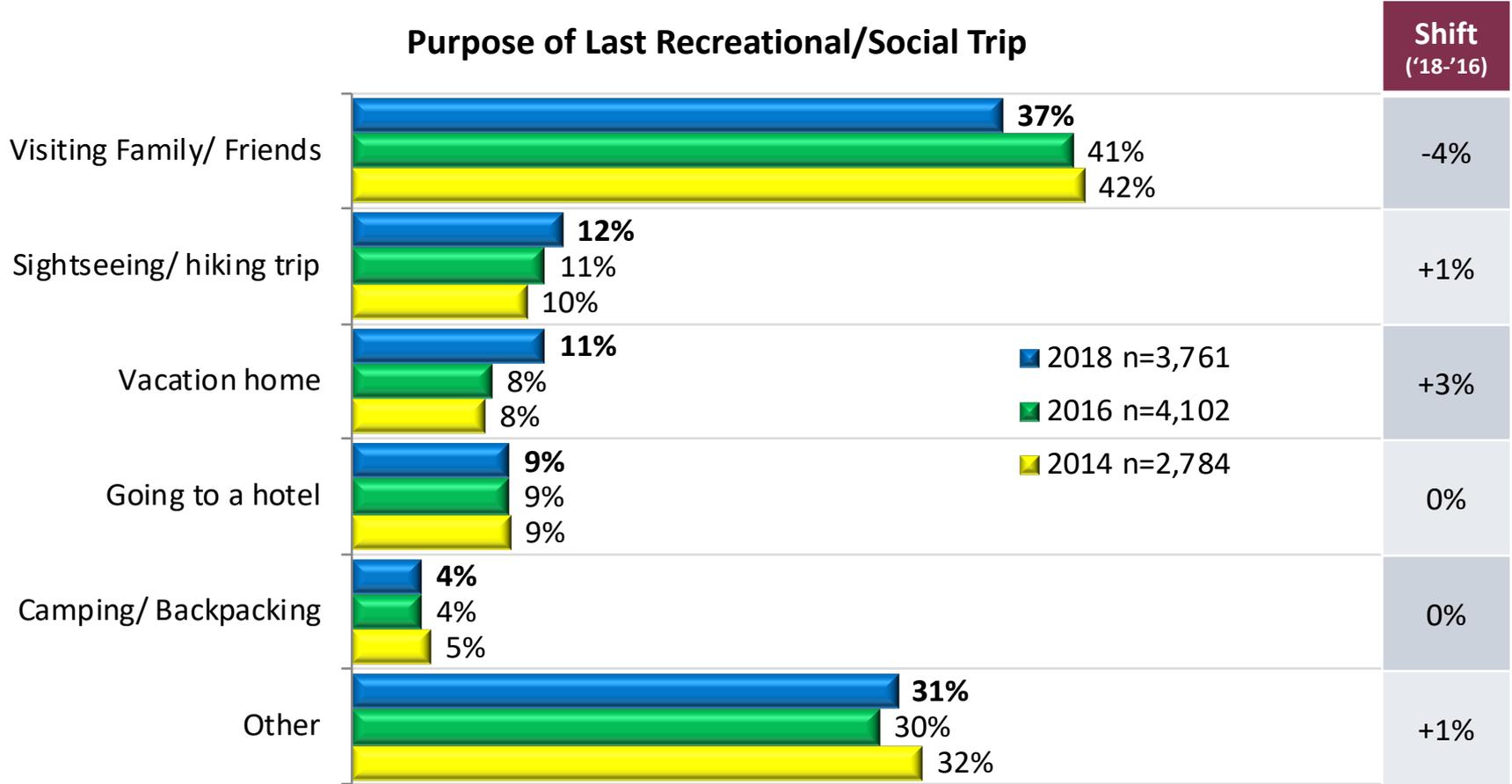
Q11. How many crossings or sailings on Washington State Ferries (WSF) did you take?

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

Recreational/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.



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

Destination & Relative Ferry Cost

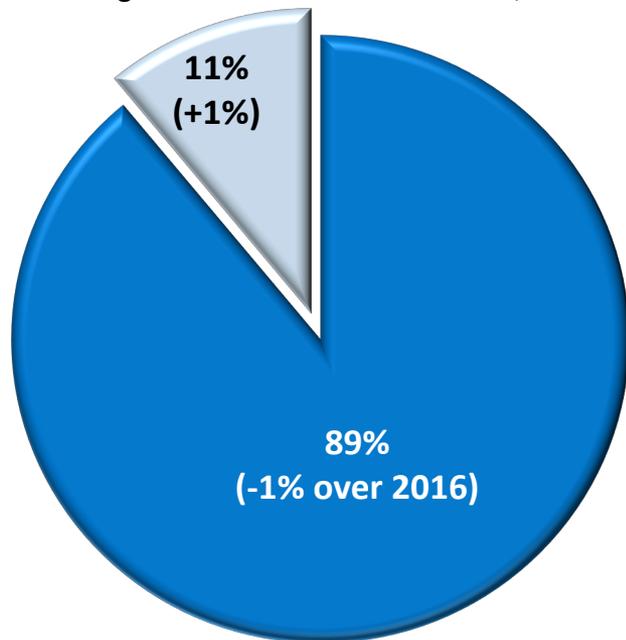


Most respondents say their most recent recreational or social trip was a WA State only trip. The ferry fare as a percent of total recreational/social trip cost is significantly higher for panel members than for non-FROG respondent (those intercepted on-board). However, the ferry fare as a percentage of the total trip costs has declined since 2016 for both panel members and onboard riders.

Destination of Last Recreational/Social Trip

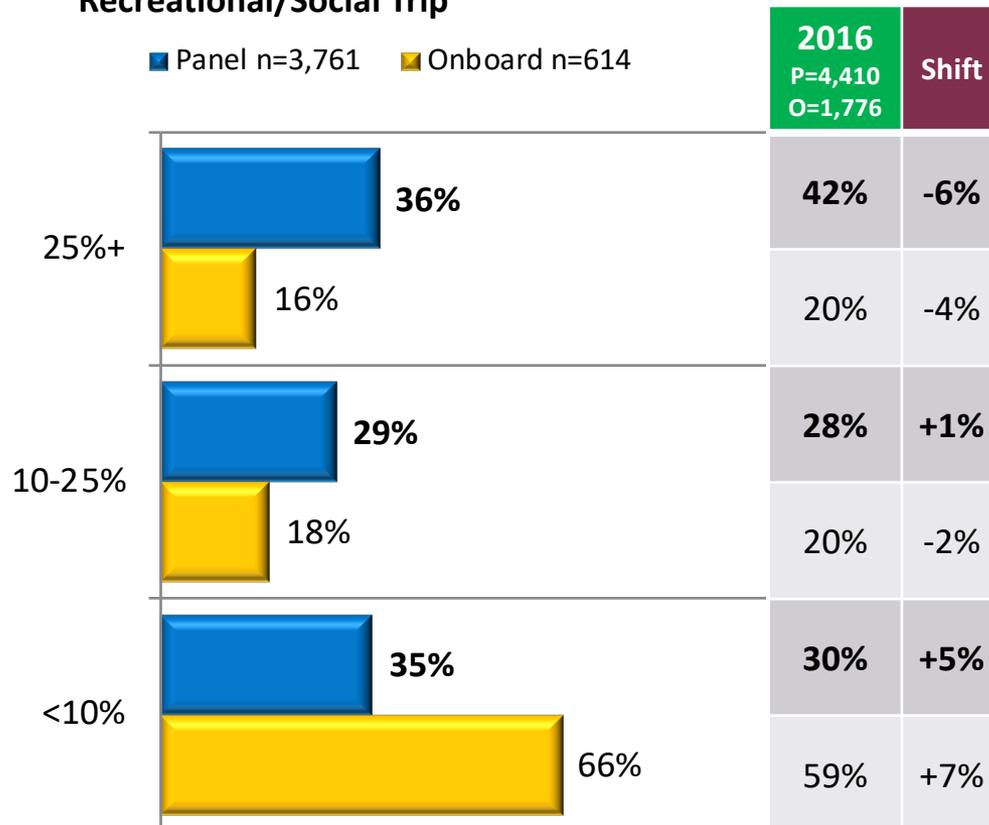
n=3,761

■ Washington State ■ Multistate/Multination



Relative Cost of Last Recreational/Social Trip

■ Panel n=3,761 ■ Onboard n=614



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?

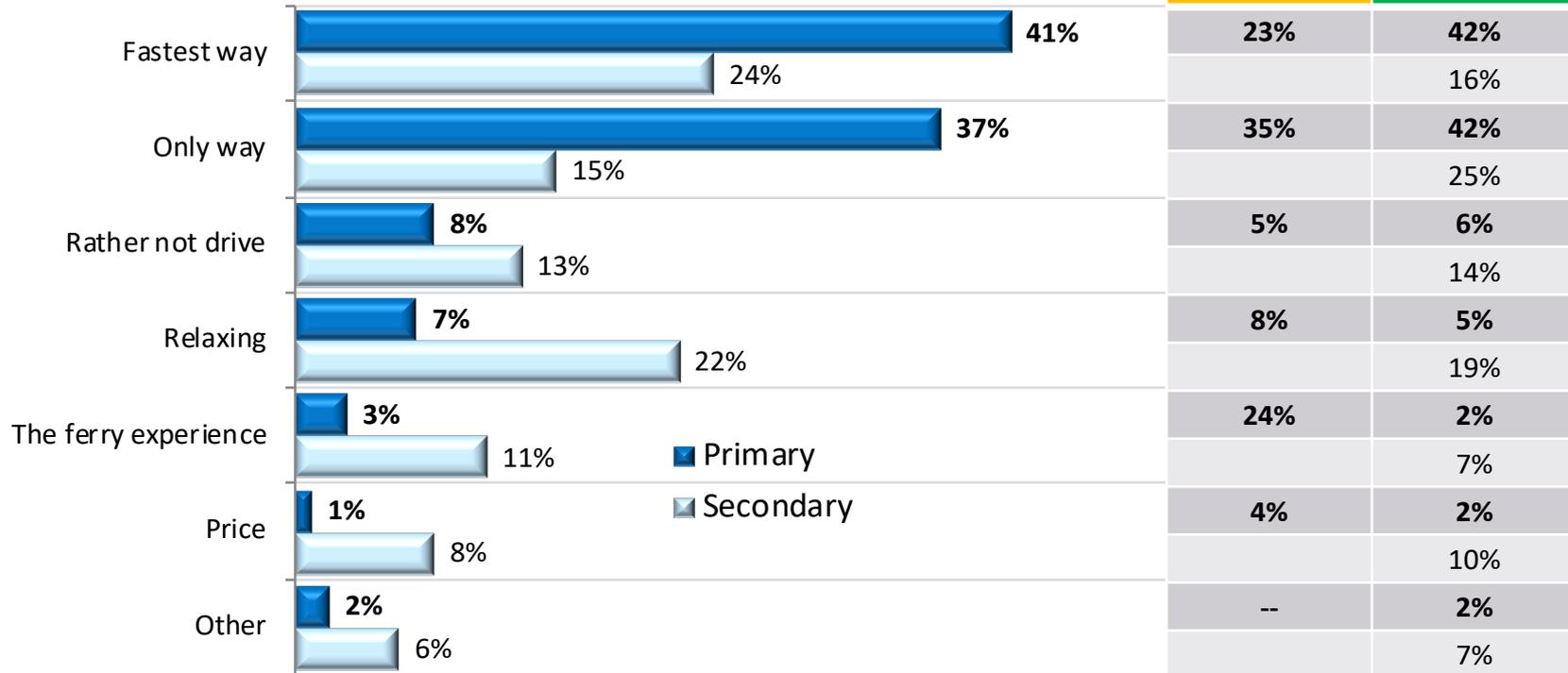
Factors Driving Ferry Decision



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?

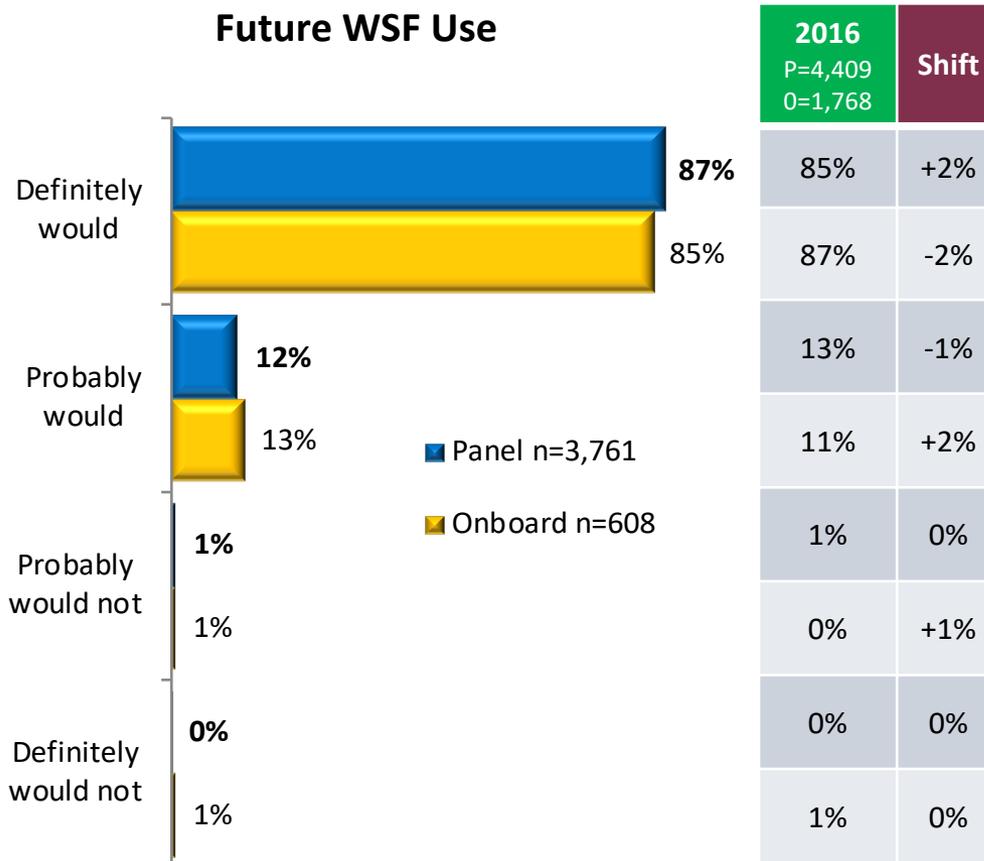
Q15b. Which other reasons describe why you chose WSF rather than some other way to make your most recent recreational or social trip? (Multiple Response)

Future Recreational/Social Use



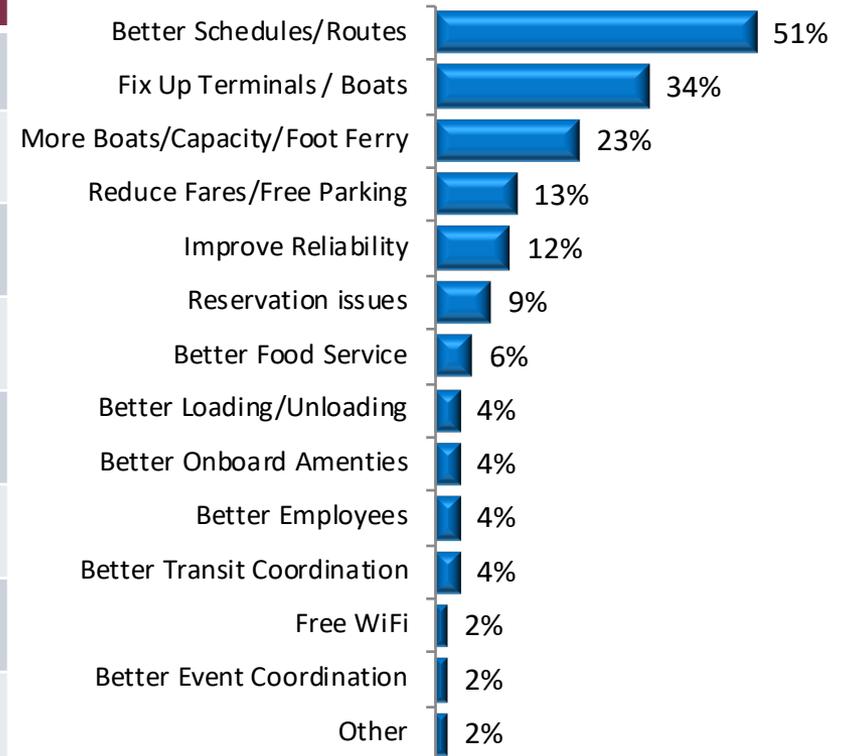
Almost all respondents, both FROG panel (87%) and onboard intercepts (85%) say they are likely to use WSF again for their next recreational or social trip. "Better schedules/routes" (51%) and "fix up terminals/boats" (34%) are the top two mentioned ways to increase the number of recreational or social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

Future WSF Use



Influencing More Recreational Use

FROG Panel n=2,581



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

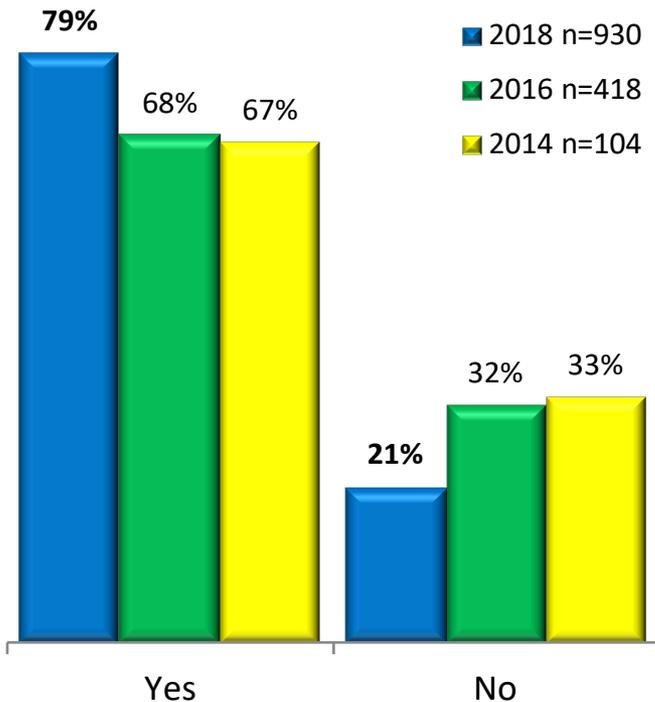
Q18. Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips that people, like you, make in a year? (Multiple Response)

Non-Recreational/Social Riders

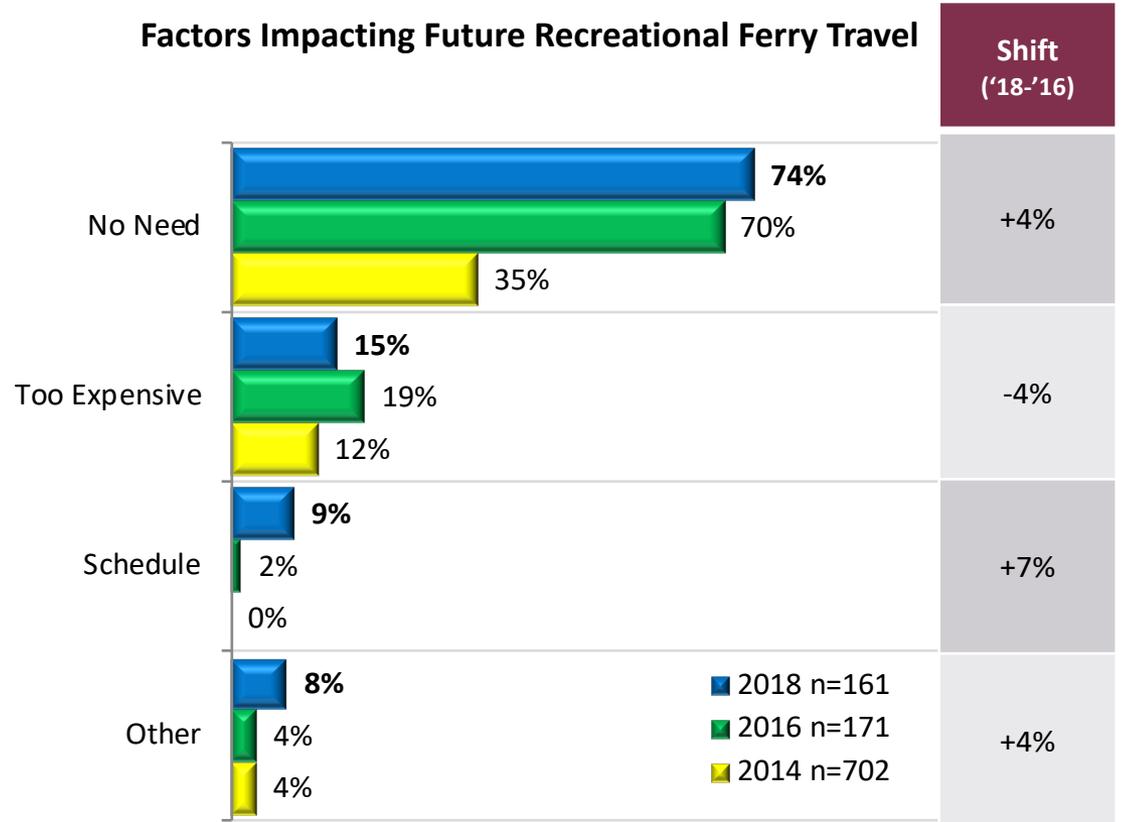


“No need” was cited most often (74%) by the summer riders who had not taken a summer ferry for recreational/social purposes. The majority (79%) said they might take a recreational/social ferry trip later in the fall.

2018 Expected Recreational Use
(Among Non-recreational Summer Travelers)



Factors Impacting Future Recreational Ferry Travel



Q27. Are you planning on taking any social or recreational trips using WSF later this year?

Q30. Why are you not likely to take social or recreational trips using Washington State Ferries? (Multiple Response)



Summer Travel Activity

Summer Period Ridership Overall



The routes with the highest 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 Fautleroy/Vashon (average is 5-6 trips per rider for heavy commuter routes).

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	39%	-2%	4.1
Coupeville/Pt. Townsend	23%	-2%	2.0
Mukilteo/Clinton	21%	-2%	6.7
Seattle/Bremerton	21%	+2%	6.5
Anacortes/San Juan...	18%	-2%	2.3
Fautleroy/Vashon	13%	+1%	7.5
Fautleroy/Southworth	9%	0%	5.4
Point Defiance/Tahlequah	9%	+1%	4.6
Southworth/Vashon	8%	+1%	3.3
San Juan Interisland	5%	-1%	2.2
Anacortes/Sidney B.C.	3%	-1%	1.3

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

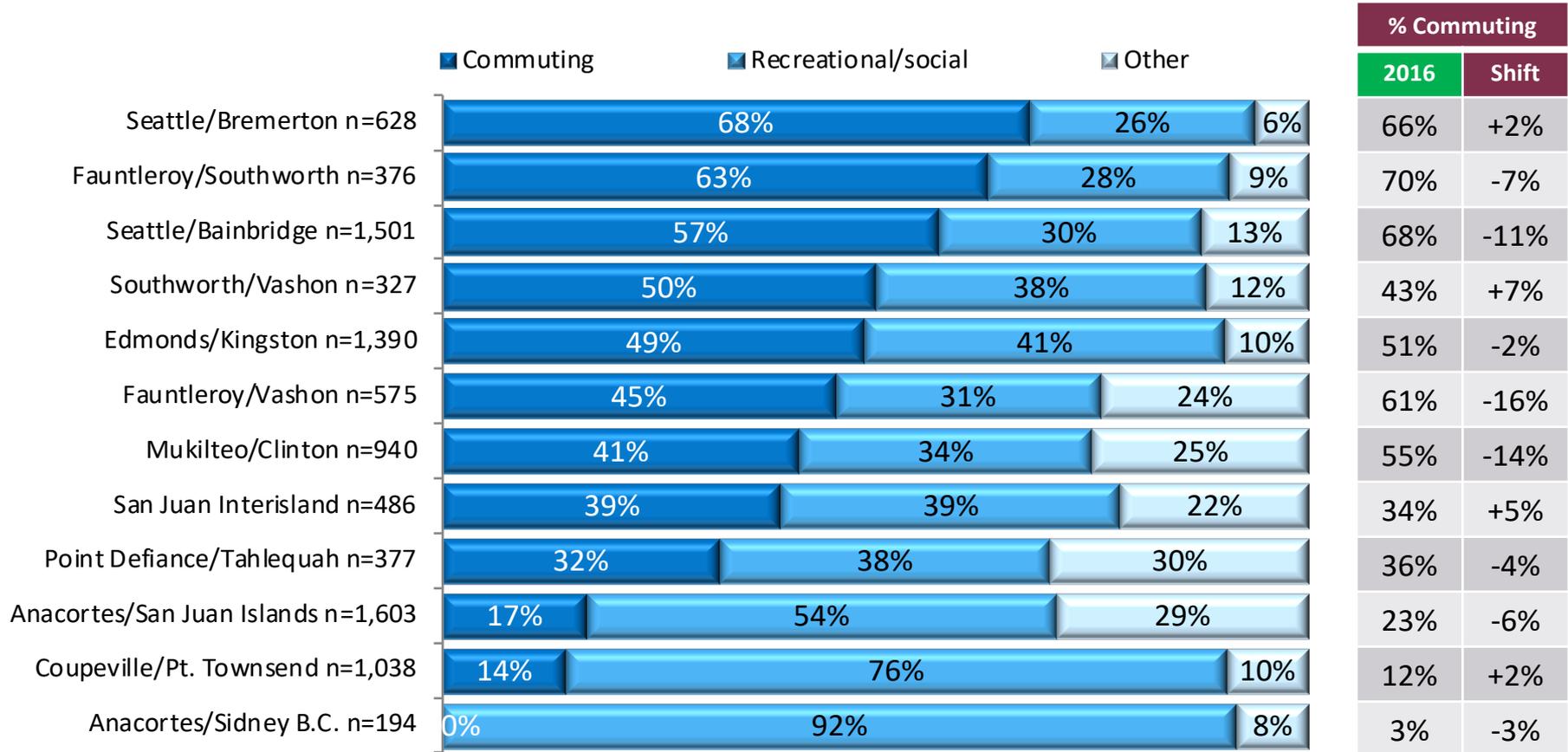
Q22. How many round trips(1 one-way = .5 round trip; 2 one-way = 1 round trip) did you take per month, on average, during the summer period?

Ridership – Commuting Trips



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

Ratio of Trips by Purpose



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?

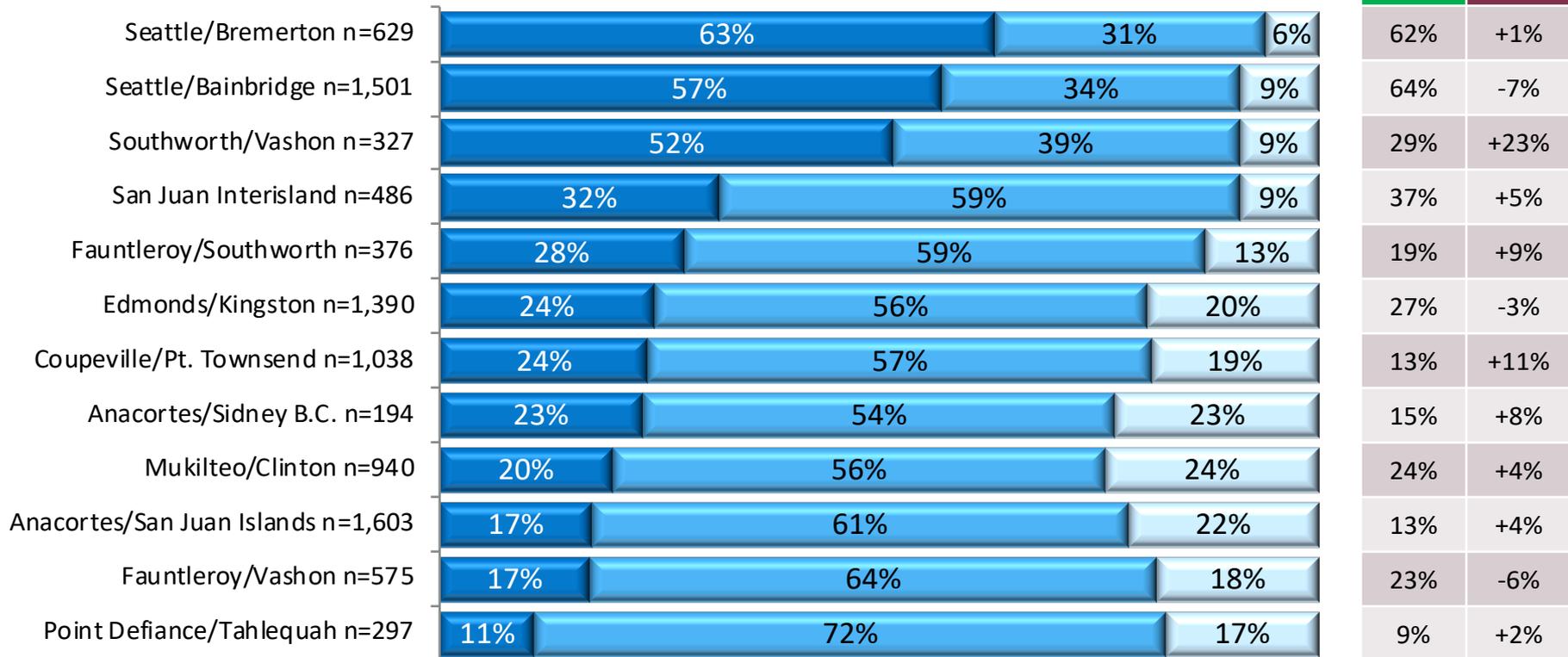
Boarding Method



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

Ratio of Trips by Boarding Method

■ Walk-on ■ Drive-on ■ Passenger



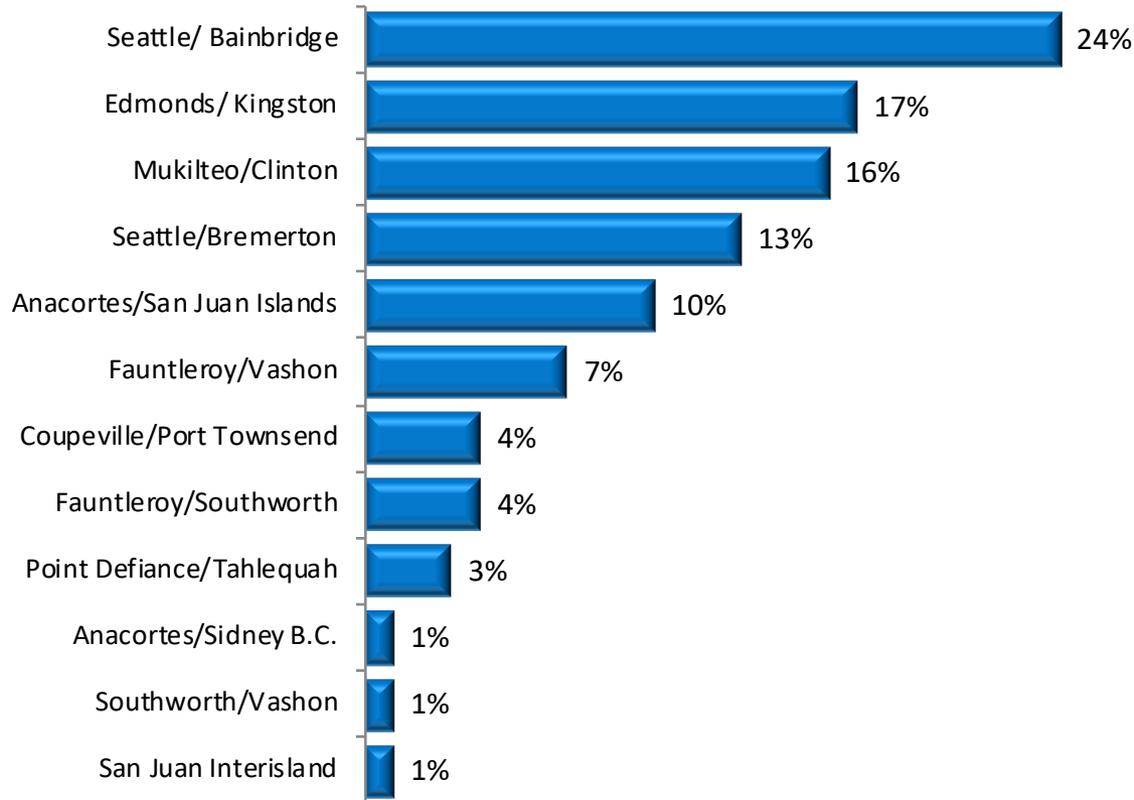
Q25. During the Summer period ... How many of your ferry trips per month for each route were boarded using the following methods?

Last Ferry Ride – Route



Seattle/Bainbridge (24%), Edmonds/Kingston (17%) and Mukilteo/Clinton (16%) remains the most recent routes ridden.

Last Route Ridden
Weighted to Reflect Actual WSF Traffic Counts
n=4,691



FROG Panel Responses	
2016 n=4,827	Shift
26%	-2%
17%	0%
16%	0%
11%	+2%
10%	0%
7%	0%
4%	0%
3%	+1%
3%	0%
1%	0%
1%	0%
1%	0%

Q31. What was the last route that you rode for any purpose? (Merged with Q3) [This question is used for weighting to actual ridership for the period]
*Includes San Juan Interisland route

Last Ferry Ride – Boarding Terminal



The figures below outline the boarding terminals for respondents' most recent summer period ferry trip.

Boarding Terminal Of Those Who Rode Route Last

Seattle/ Bainbridge		Seattle/ Bremerton		Point Defiance/ Tahlequah		Edmonds/ Kingston		Fautleroy/ Vashon		Fautleroy/ Southworth	
n=873		n=331		n=99		n=486		n=367		n=188	
Seattle	34%	Seattle	29%	Point Defiance	27%	Edmonds	41%	Fautleroy	38%	Fautleroy	41%
Bainbridge	66%	Bremerton	71%	Tahlequah	73%	Kingston	59%	Vashon	62%	Southworth	59%

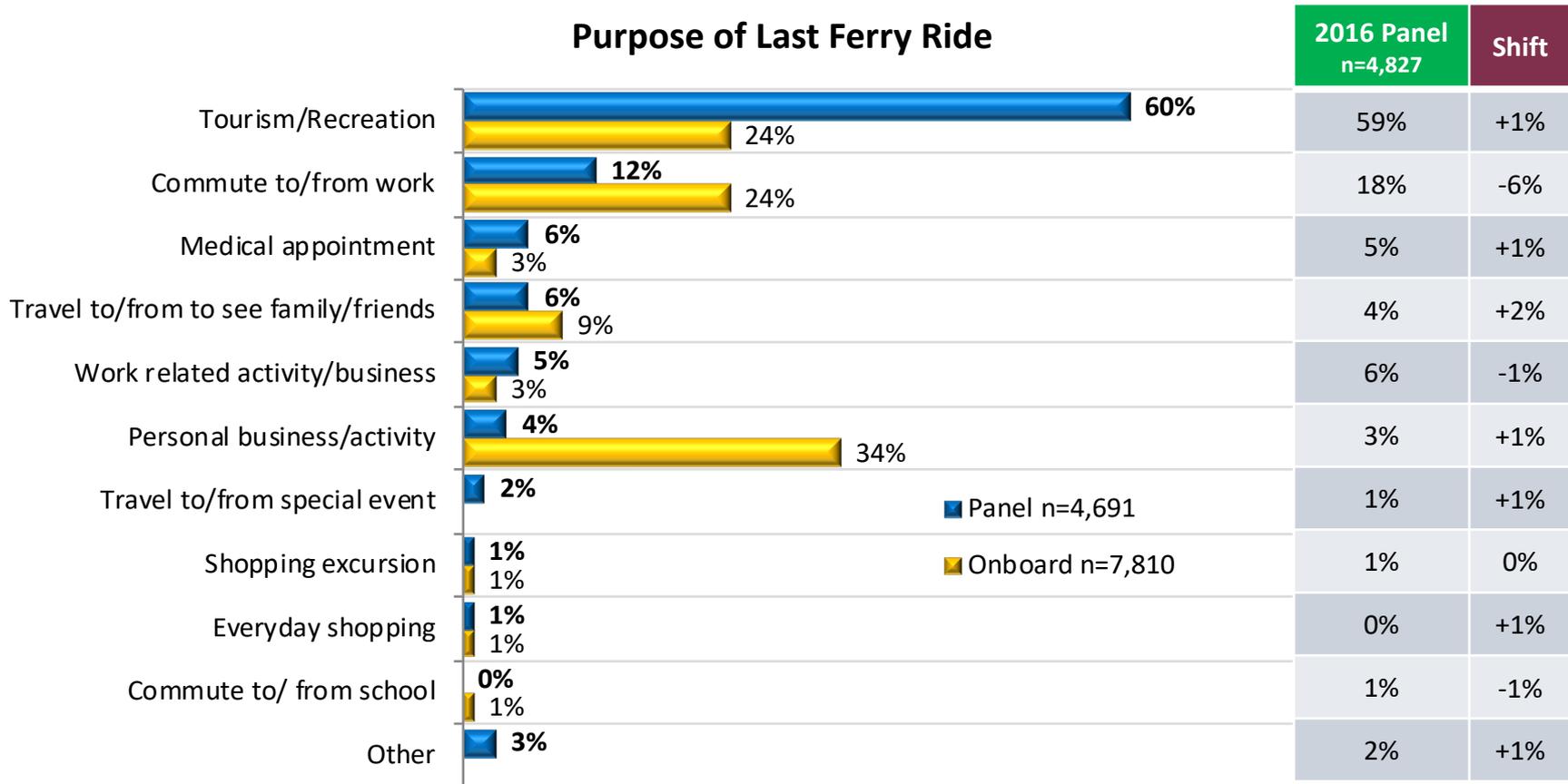
Southworth/ Vashon		Coupeville/ Pt. Townsend		Mukilteo/ Clinton		Anacortes/ San Juan Islands		San Juan Interisland		Anacortes/ Sidney B.C.	
n=32		n=235		n=685		n=1,293		n=61		n=41	
Southworth	37%	Coupeville	54%	Mukilteo	31%	Orcas	28%	Orcas	58%	Anacortes	65%
Vashon	63%	Pt Townsend	46%	Clinton	69%	Shaw	1%	Shaw	0%	Sidney BC	26%
						Lopez	12%	Lopez	16%	Friday Harbor	9%
						Friday Harbor	27%	Friday Harbor	26%		
						Anacortes	32%				

Q32. From which terminal did you depart on your most recent trip? (Combined with Q4)

Purpose of Last Ferry Ride



A majority (60%) said that the purpose of their summer period ferry ride was tourism/recreational, a increase of 1% from 2016. The onboard intercepted ferry riders said their trip was for an unspecified personal business/activity (34%) followed by either recreation/social (24%) or commuting to work (24%).



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)

Onboard intercepts: All riders approached by the interviewers were asked this question thus results represents both recreation and non-recreation rider.

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 riders saying their last ride was for recreational/social purposes than all other routes. Anacortes/Sidney (0%) and Anacortes/San Juan Islands (1%), and Coupeville/Port Townsend (3%) have the largest percentage of riders claiming their last ride was for commuting to/from work.

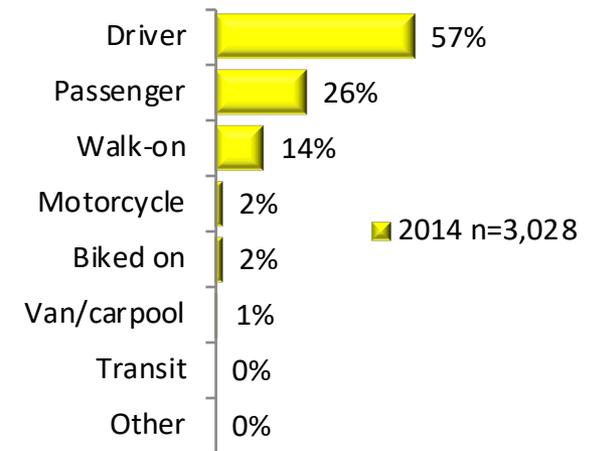
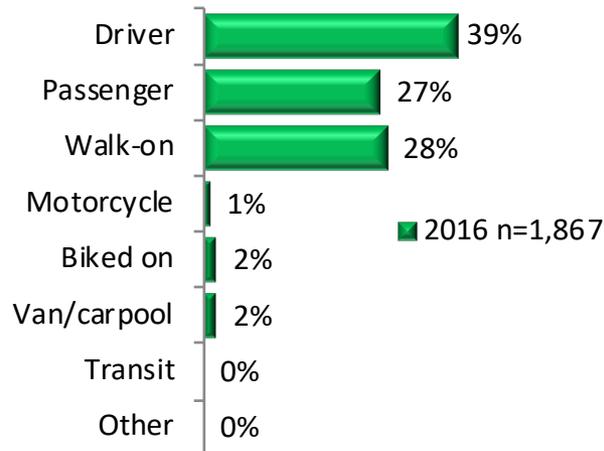
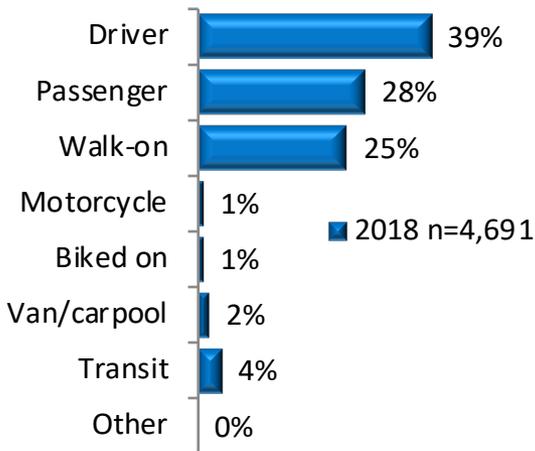
Purpose of Last Ferry Ride 2018	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	4,691	1,150	634	158	816	343	188	43	184	775	471	38	52
Tourism / Recreation / Social	60%	54%	57%	52%	63%	54%	56%	49%	83%	61%	73%	52%	95%
Commute to/ from work	12%	15%	21%	9%	11%	11%	23%	18%	3%	8%	1%	6%	--
Medical appointment	6%	8%	1%	6%	3%	10%	1%	--	2%	9%	8%	5%	--
Travel to/ from to see family/ friends	6%	4%	5%	10%	9%	5%	8%	7%	6%	6%	4%	3%	--
Work related activity/ business	5%	6%	5%	4%	6%	7%	3%	11%	2%	4%	4%	19%	--
Personal business/ activity	4%	6%	--	3%	4%	4%	3%	9%	--	4%	3%	8%	2%
Travel to/ from special event	2%	3%	5%	4%	1%	2%	3%	--	--	2%	2%	1%	--
Shopping excursion	1%	--	1%	2%	--	2%	--	--	--	2%	1%	--	2%
Everyday shopping	1%	--	2%	5%	--	1%	1%	--	2%	1%	1%	--	--
Commute to/ from school	0%	--	1%	1%	--	--	2%	--	--	--	--	--	--
Other	3%	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)

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%	--	--
Onboards: Vehicle Driver/Passenger	58%	Boarding method is based on the 612 non-FROG summer recreational riders that were intercepted on the vessels.											
Onboards: Walk-on	39%												
Onboards: Bike on	2%												
Onboards: Motorcycle	1%												

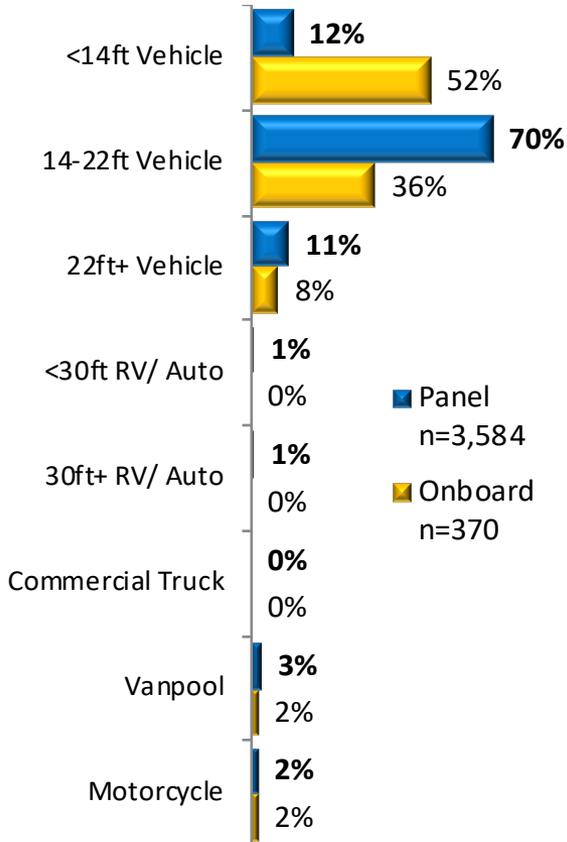
Q34. In which of the following ways have you boarded the ferry? (combined with Q5)

Vehicle Drove on for Last Ferry Ride

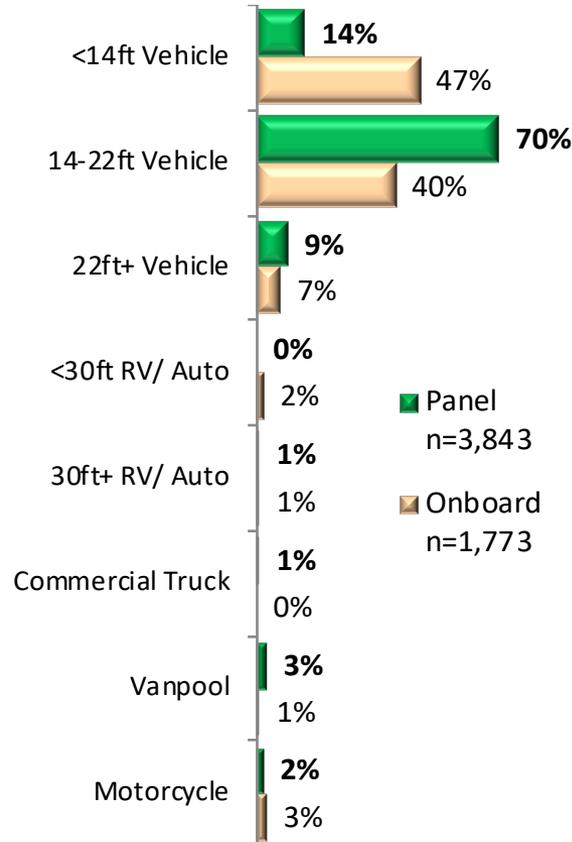


As in both 2016 (70%) and 2014 (66%), midsize auto/SUV/Pickup (14-22ft) is the dominate vehicle type driven onto the ferry.
 (note: an explanation for the discrepancy between onboard and panel data may be attributed to the panel getting visual examples of the categories, where as the onboard respondents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

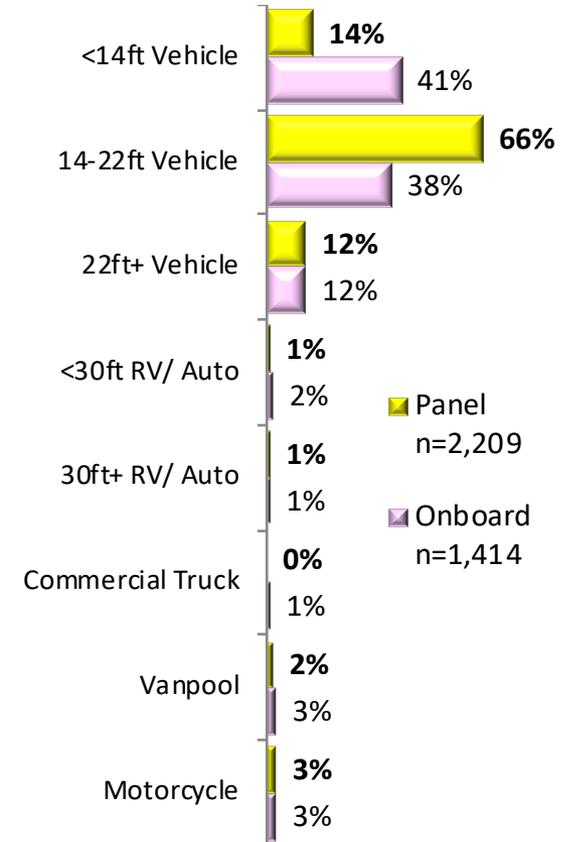
2018 Vehicle Type



2016 Vehicle Type



2014 Vehicle Type

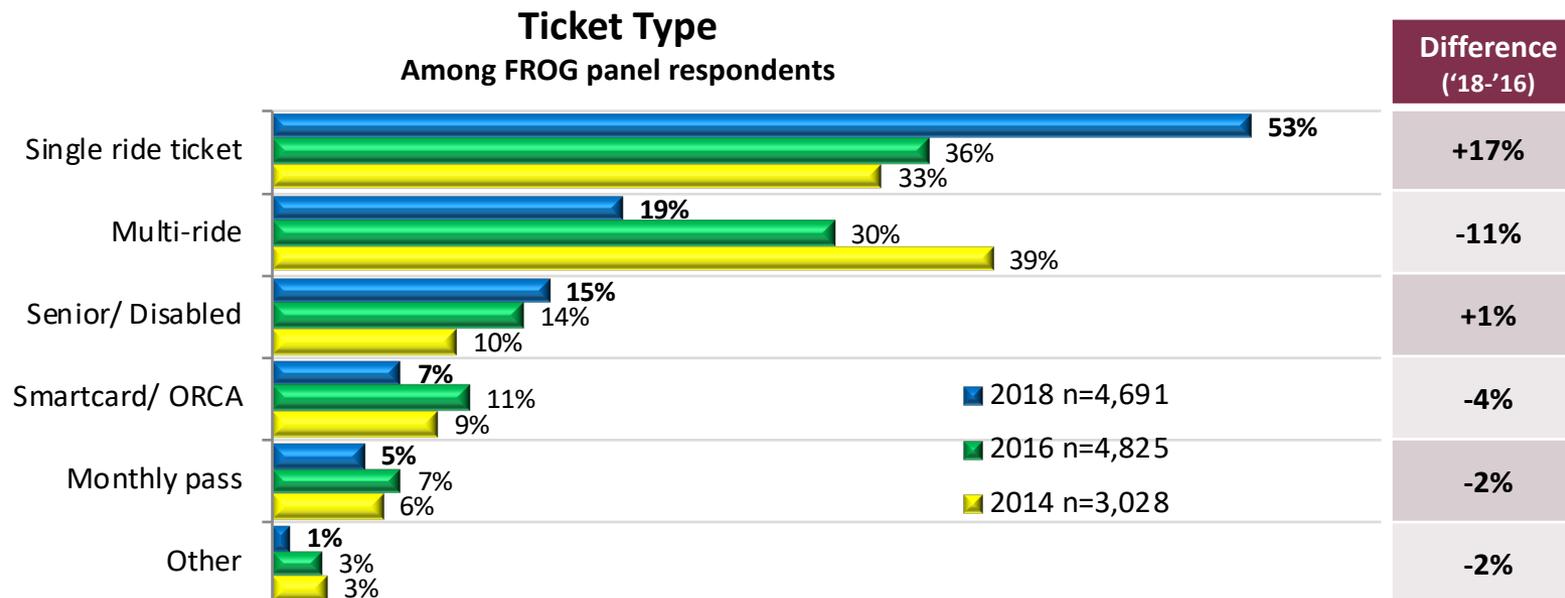


Q35. Which of the following best describes the vehicle you drove on the ferry? (merged with Q6)
 Onboards: Vehicle Type is based on only those non-FROG summer recreational riders.

Ticket Type



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



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)



Summer Rider Satisfaction

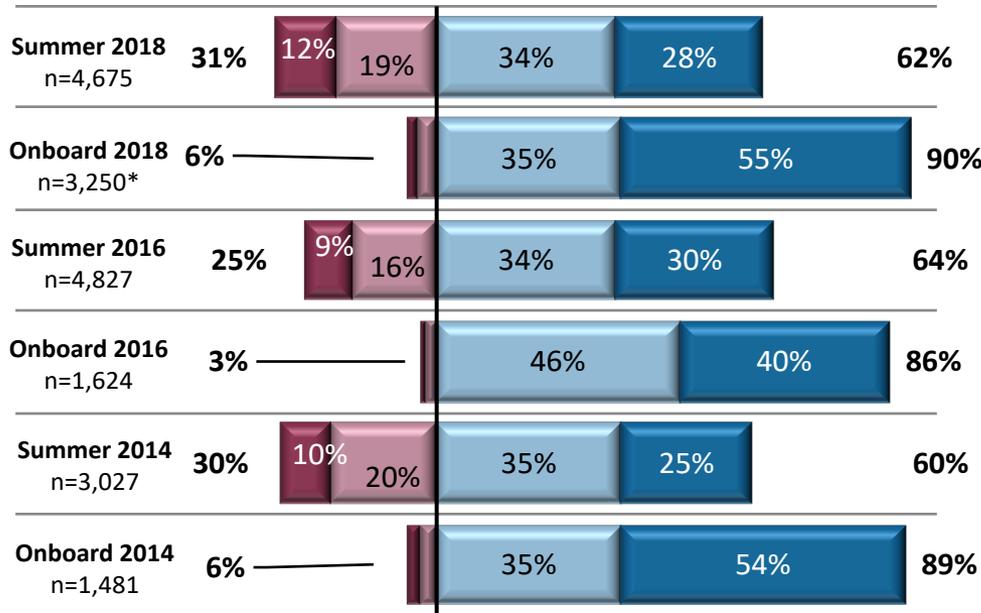
Overall Satisfaction



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. 62%). 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 Dissatisfied Satisfied Extremely satisfied



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.

The **bold** percentages represents the corresponding total dis/satisfaction

* Onboard 2018 represent all non-FROG intercepted riders

Overall Dissatisfaction by Route

(Total dissatisfied - 2018)

Route	2018 Total 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?

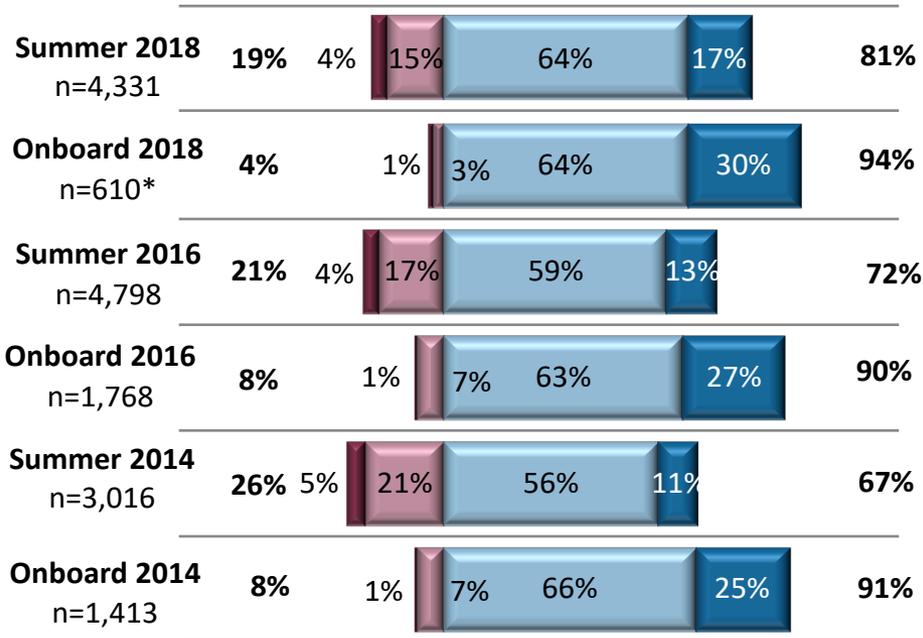
Overall Value



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

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

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

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

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

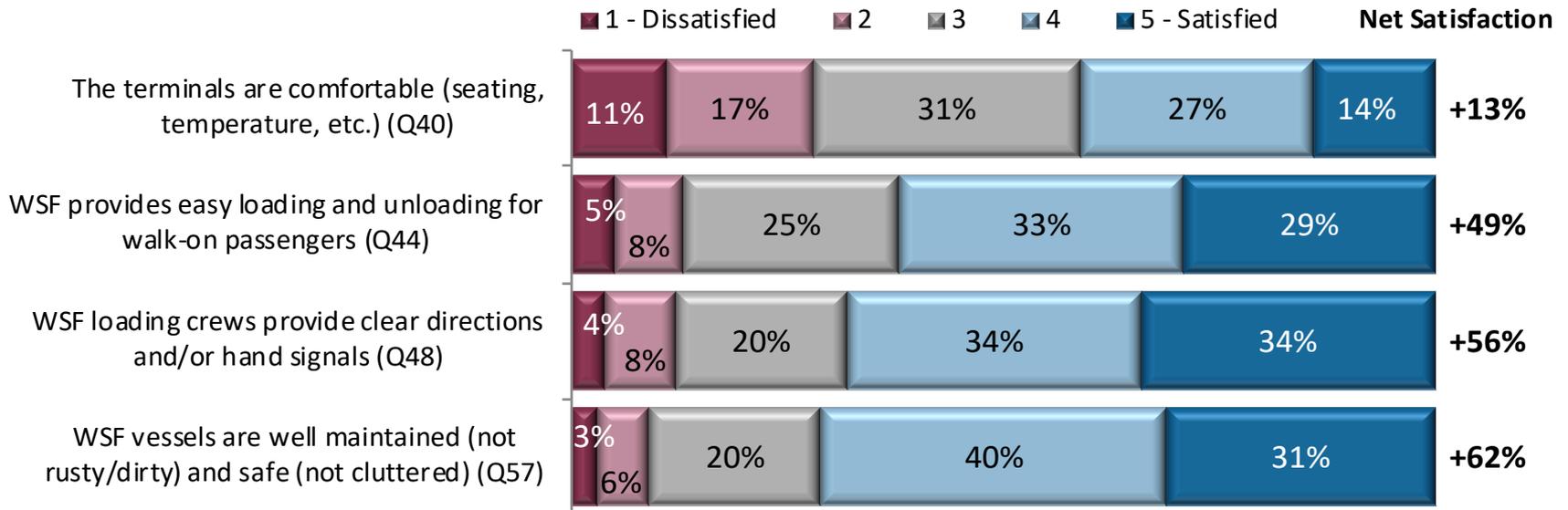
Satisfaction by Attribute - Tracking



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

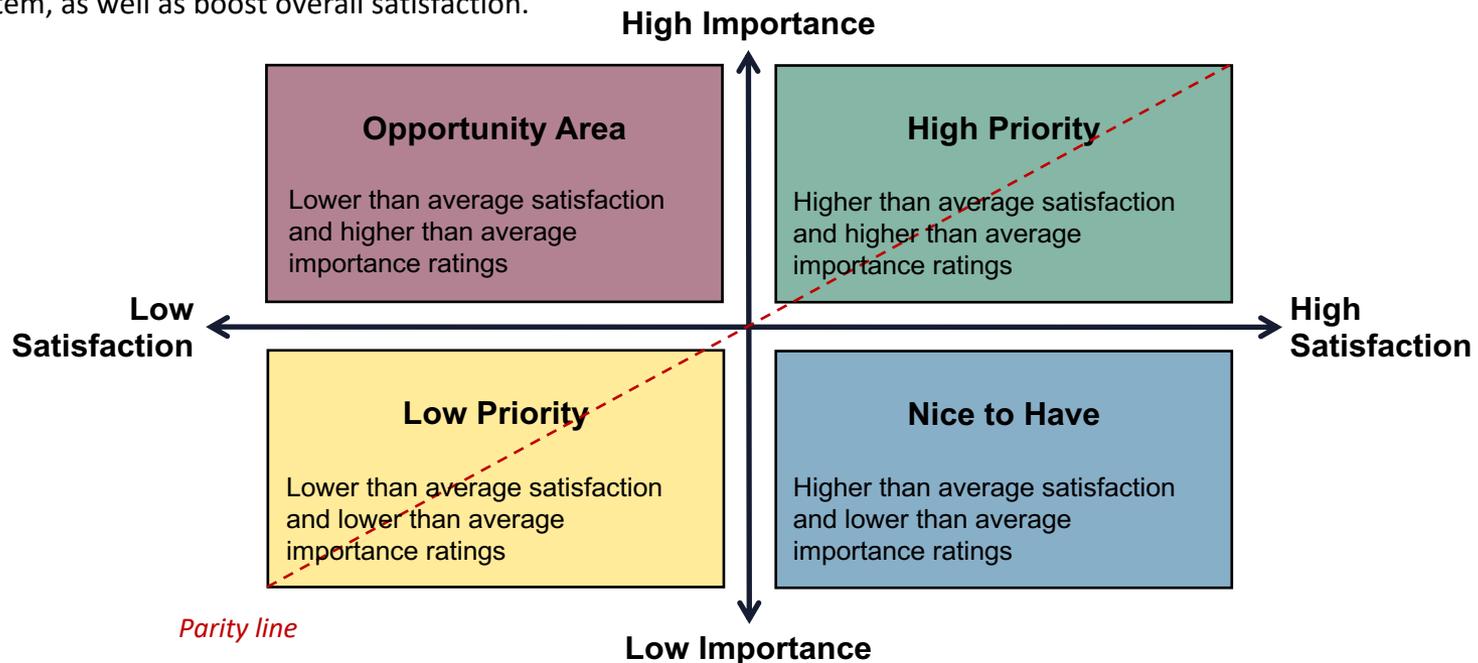
Attributes	Summer Total Dissatisfaction		
	2018	2016	Shift
Terminals are comfortable	28%	16%	+12%
WSF provides easy loading and unloading for walk-ons	13%	14%	-1%
WSF loading crews provide clear directions and/or hand signals	12%	11%	+1%
WSF Vessels are well maintained and safe	9%	11%	-2%



Gap Analysis



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

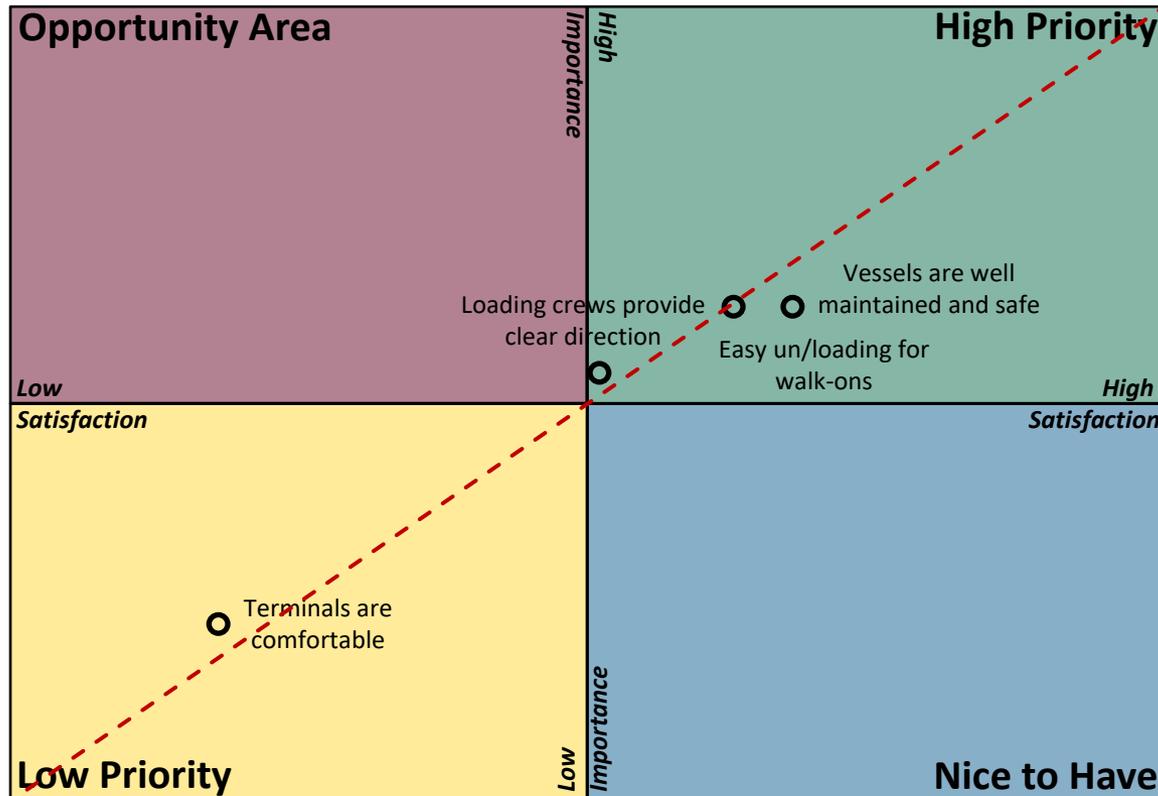


Gap Analysis: Overall - 2018



Systemwide, all four attributes tested have approximately equal levels of satisfaction with their corresponding level of importance. While there are no opportunity areas systemwide, “loading crews providing clear directions,” “vessels are well maintained and safe,” and “easy unloading and loading for walk-ons” are the three highest priority attributes for summer respondents both in 2018 and 2016. “Terminals are comfortable did shift to the negative in 2018

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

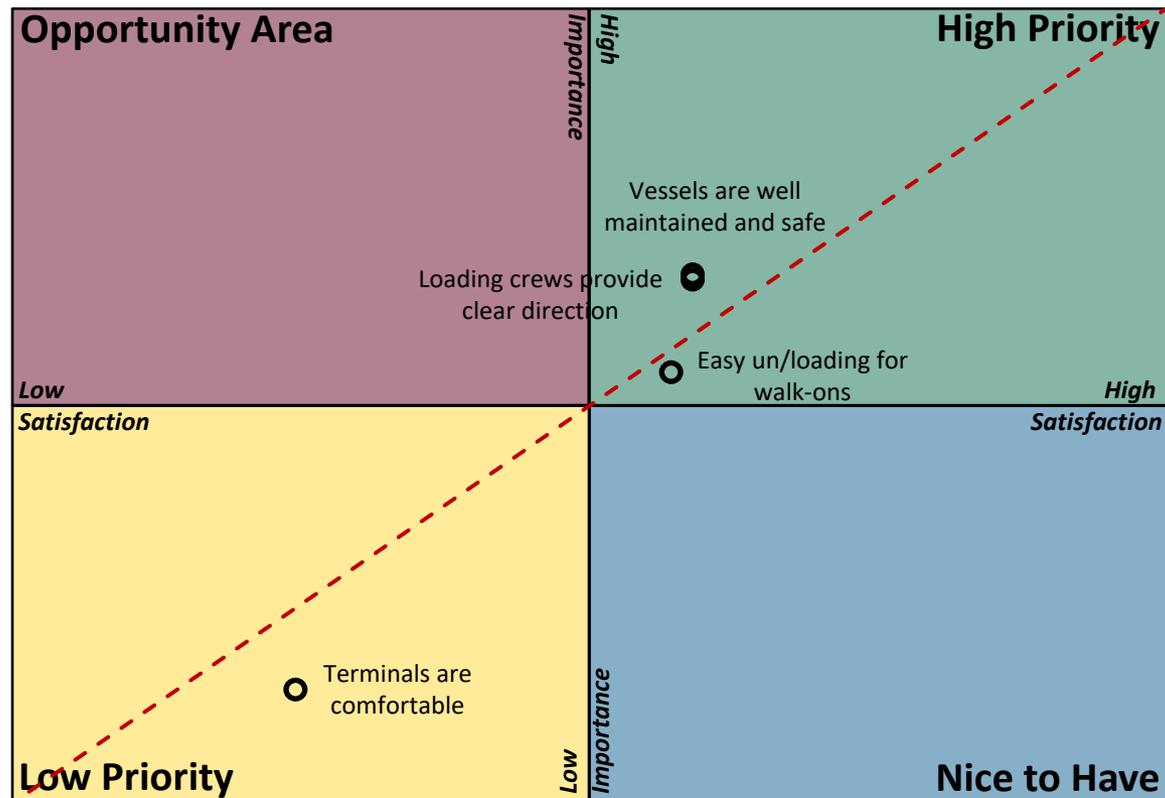


Gap Analysis: Overall - 2016



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)

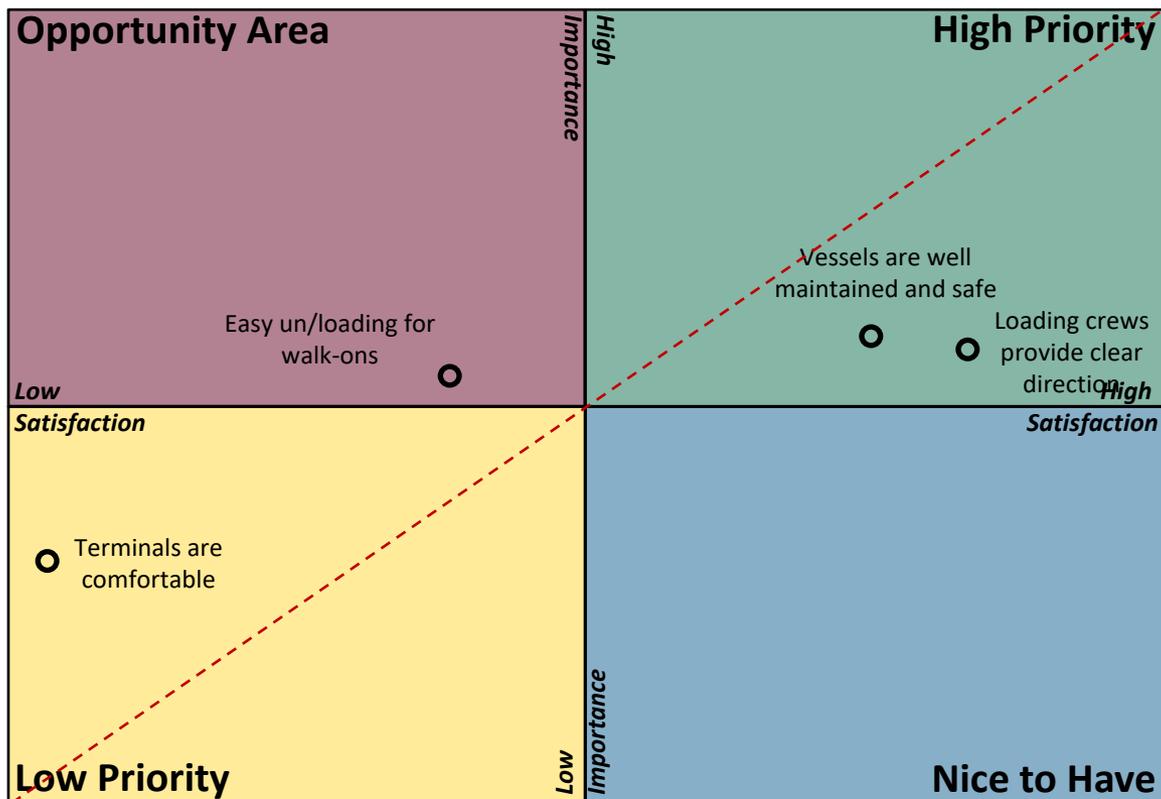


Gap Analysis: Seattle/ Bainbridge - 2018



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)

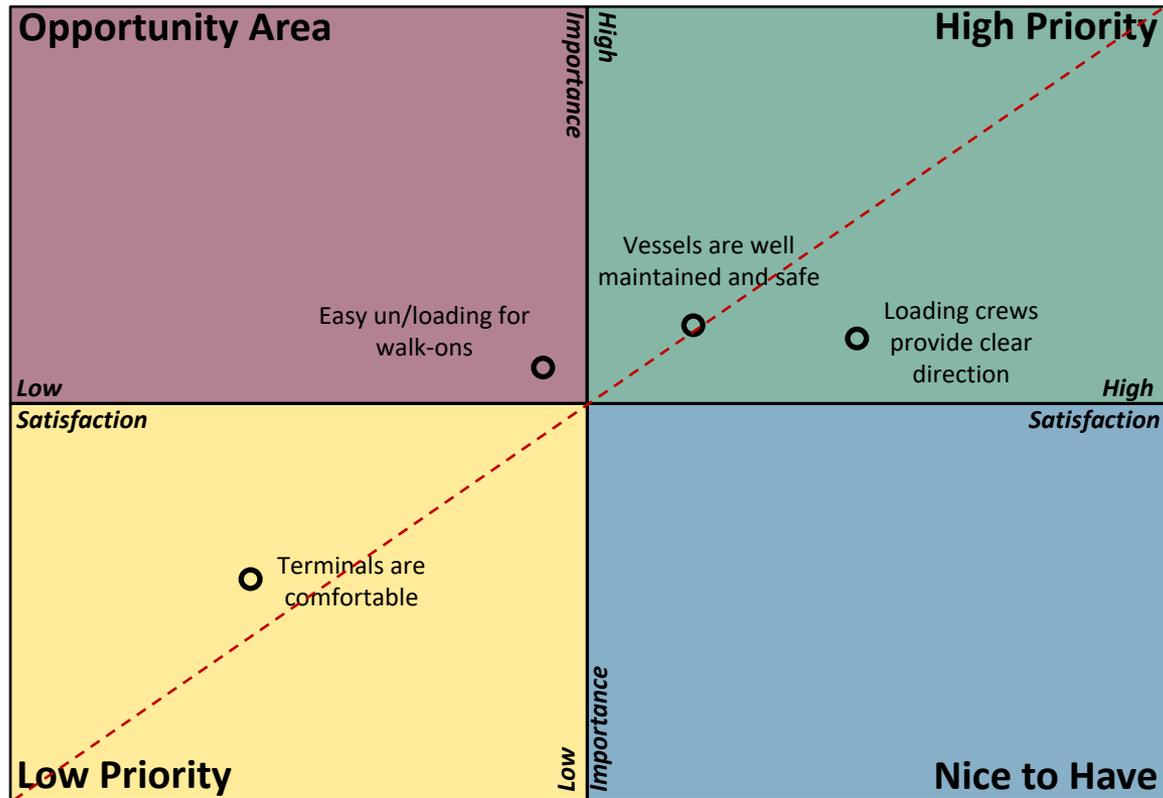


Gap Analysis: Seattle/ Bainbridge - 2016



Among Seattle/ Bainbridge riders, "easy loading and unloading for walk-on's" is the greatest area for improvement.

Satisfaction vs. Importance Ratings (n=597 - 714)

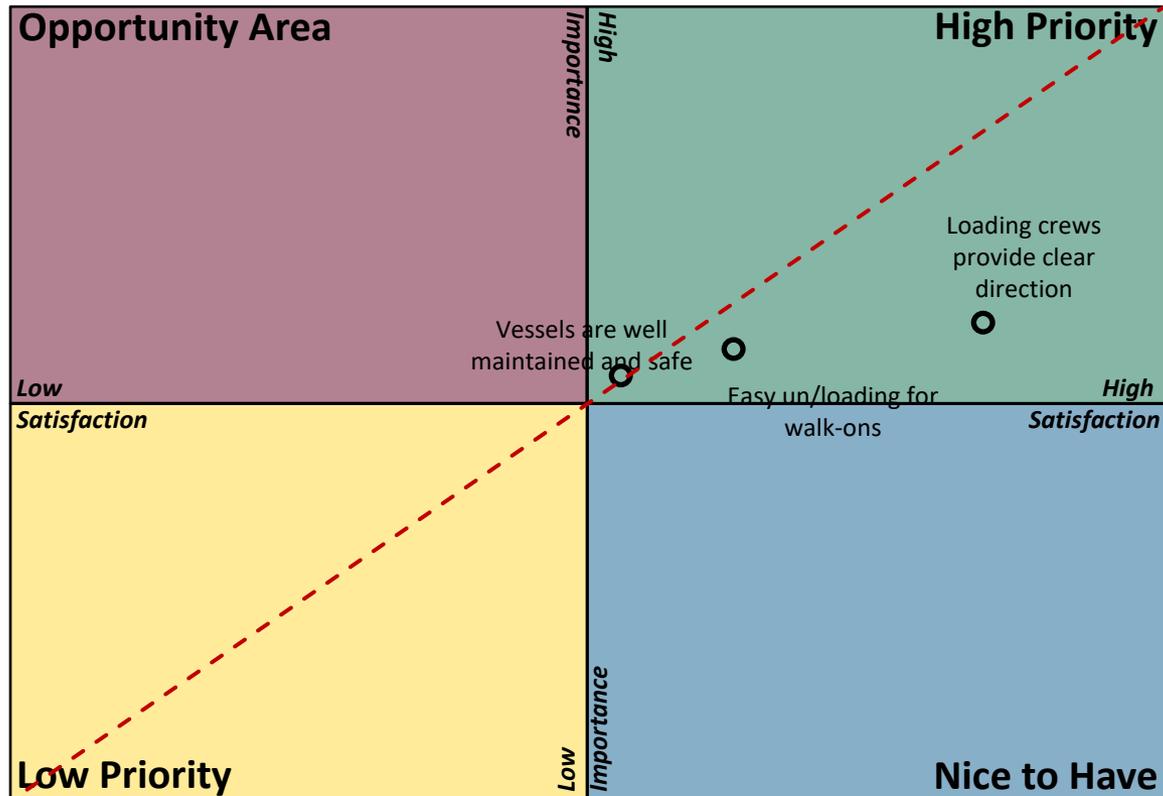


Gap Analysis: Seattle/ Bremerton - 2018



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)



o Terminals are Comfortable*

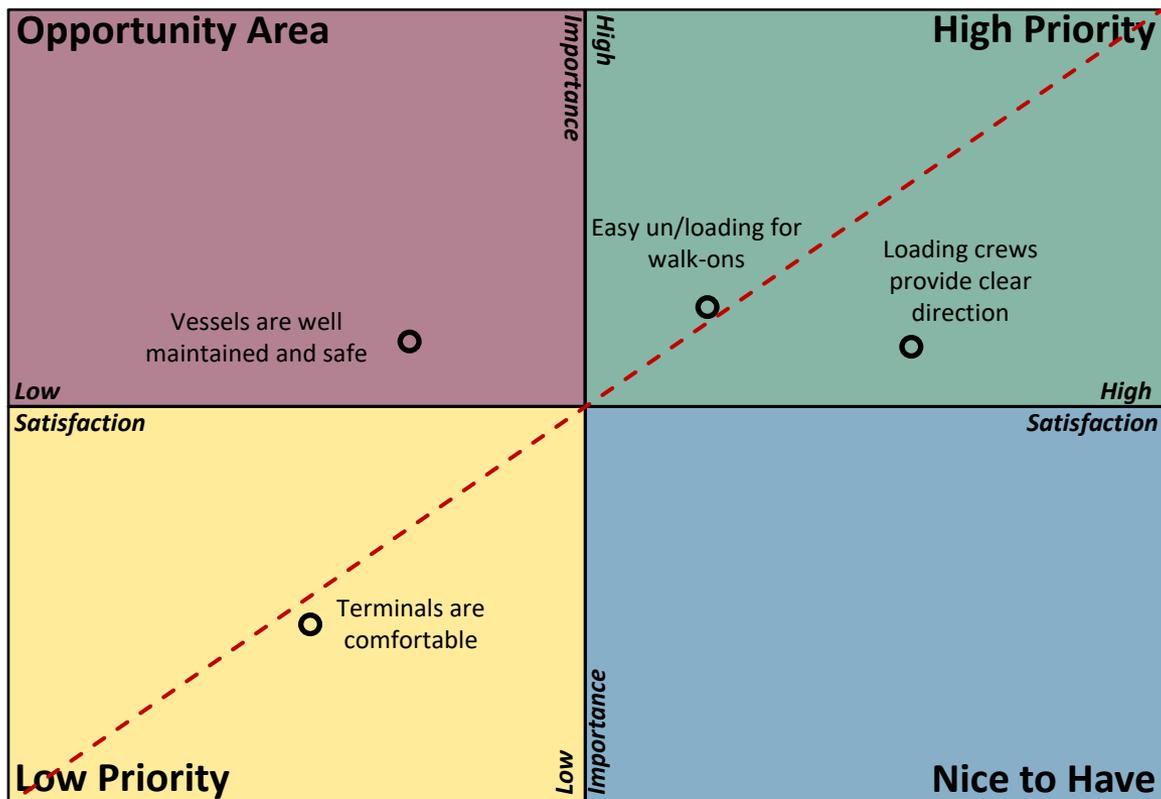
* Satisfaction scores outside of graph area

Gap Analysis: Seattle/ Bremerton - 2016



Among Seattle/ Bremerton riders, “vessels are well maintained and safe” is the greatest opportunity area.

Satisfaction vs. Importance Ratings (n=225 - 281)

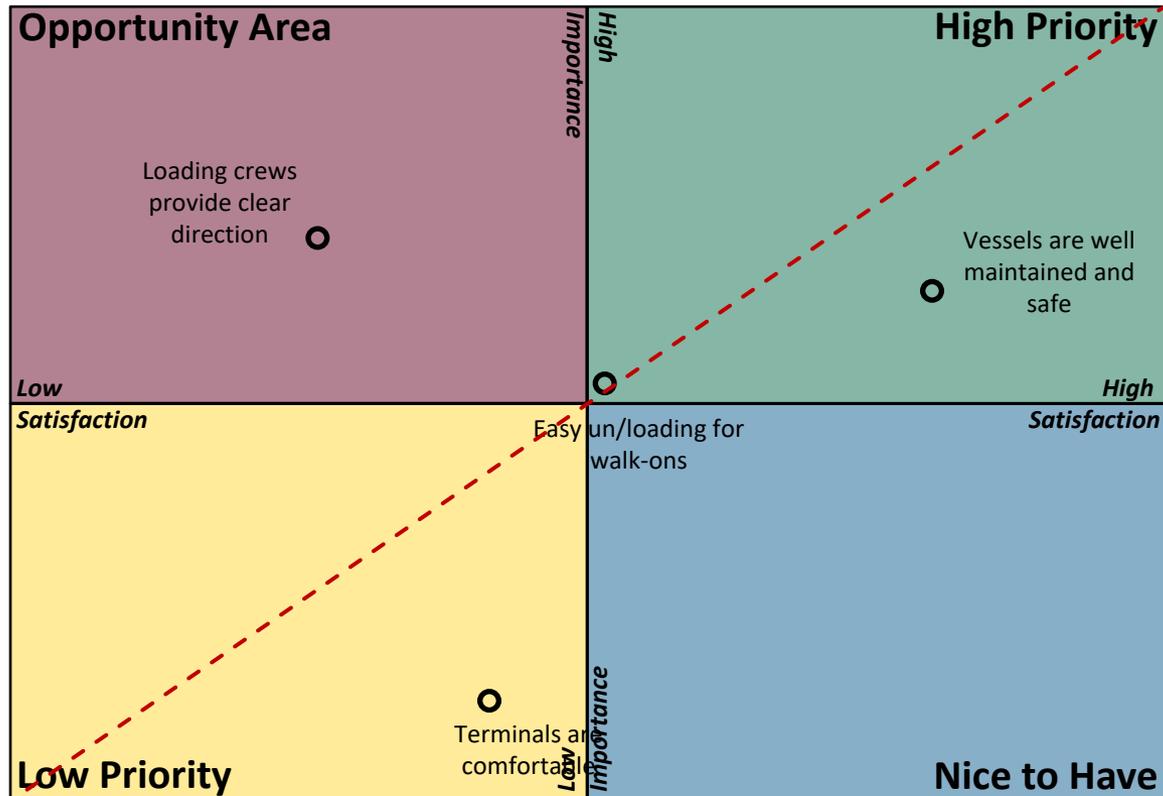


Gap Analysis: Point Defiance/ Tahlequah - 2018



“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)

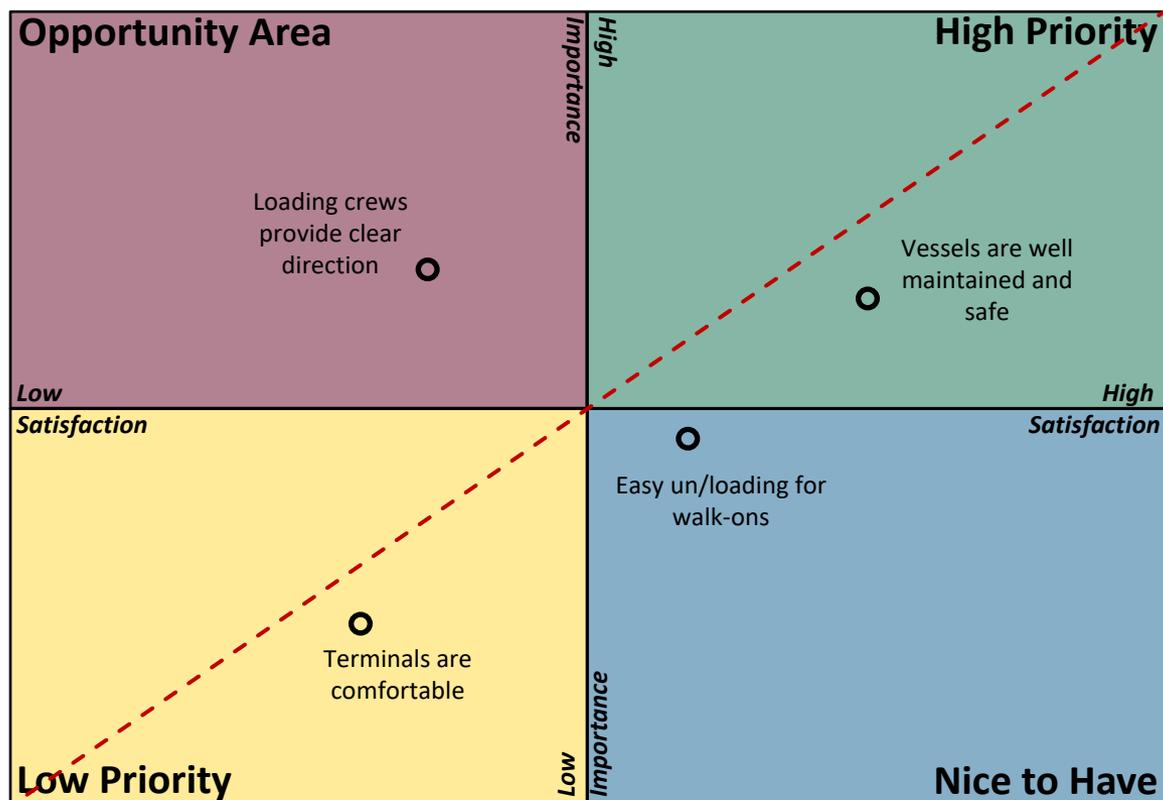


Gap Analysis: Point Defiance/ Tahlequah - 2016



"Loading crews providing clear directions" is the greatest opportunity area for Point defiance/Tahlequah riders

Satisfaction vs. Importance Ratings (n=26 - 47)

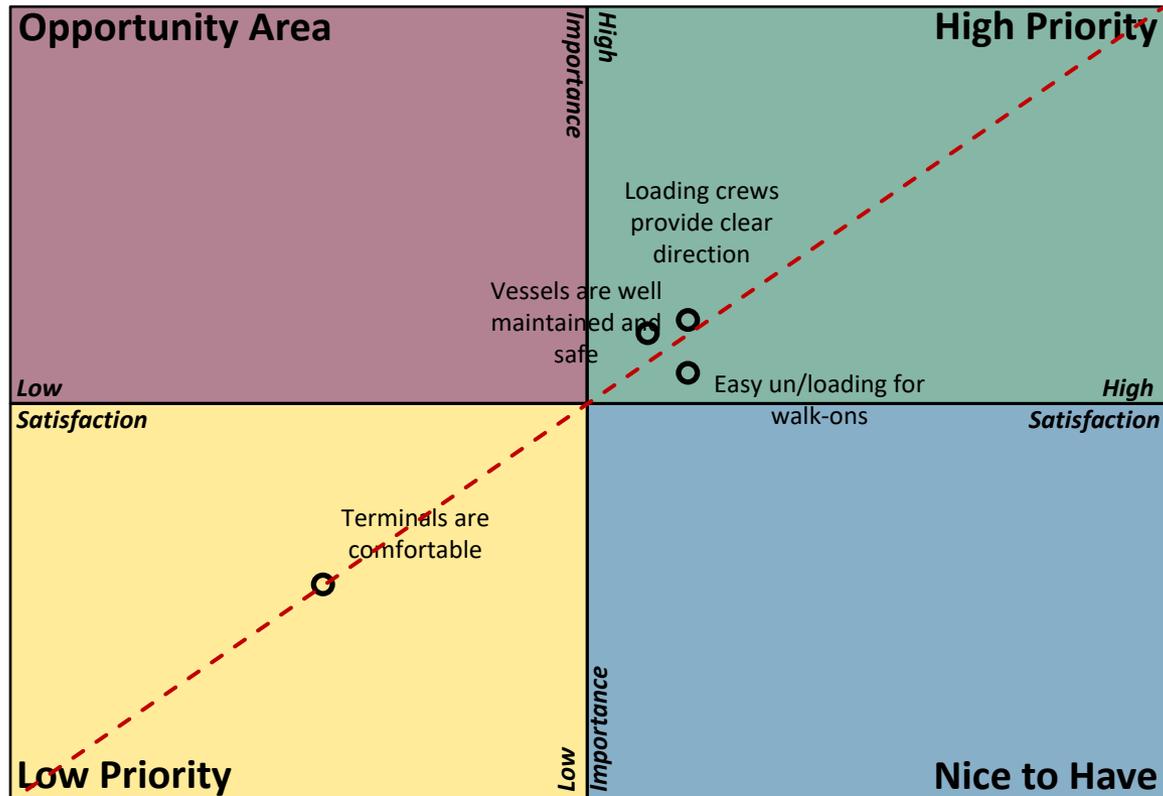


Gap Analysis: Edmonds/ Kingston - 2018



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)

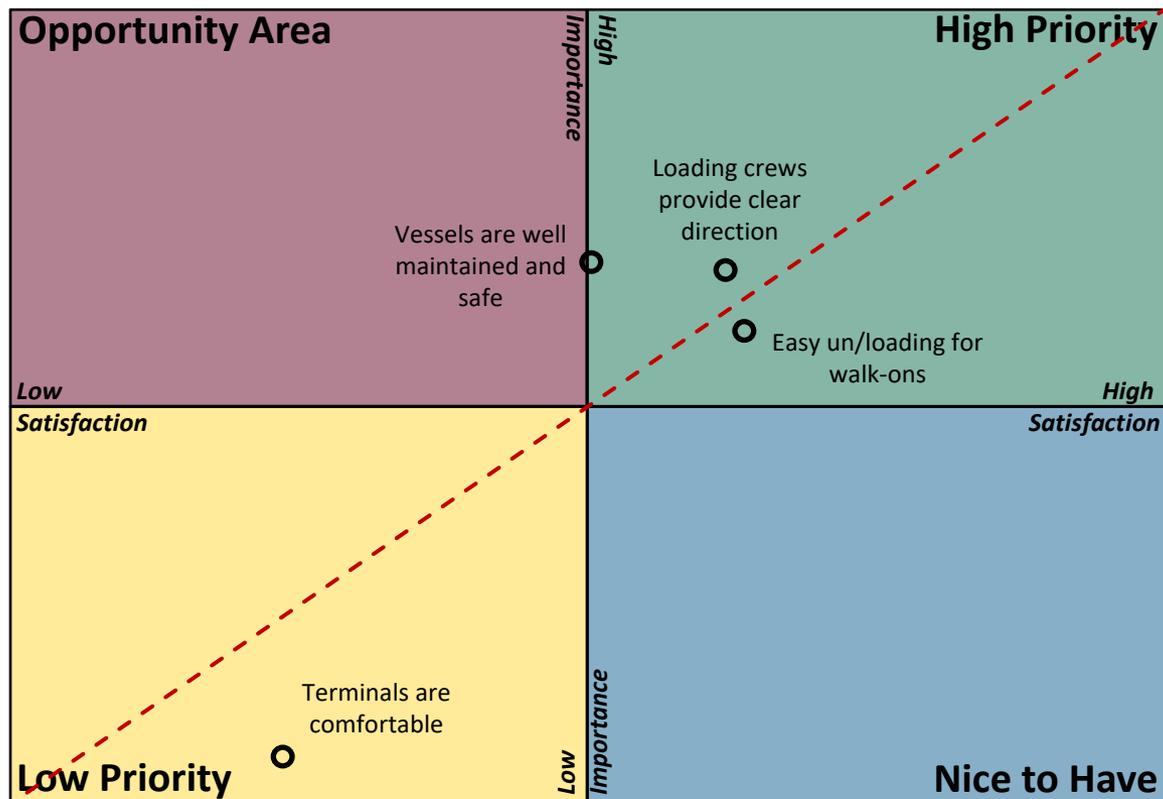


Gap Analysis: Edmonds/ Kingston - 2016



"Vessels are well maintained and safe" is a priority, but not an opportunity area.

Satisfaction vs. Importance Ratings (n=268 - 451)

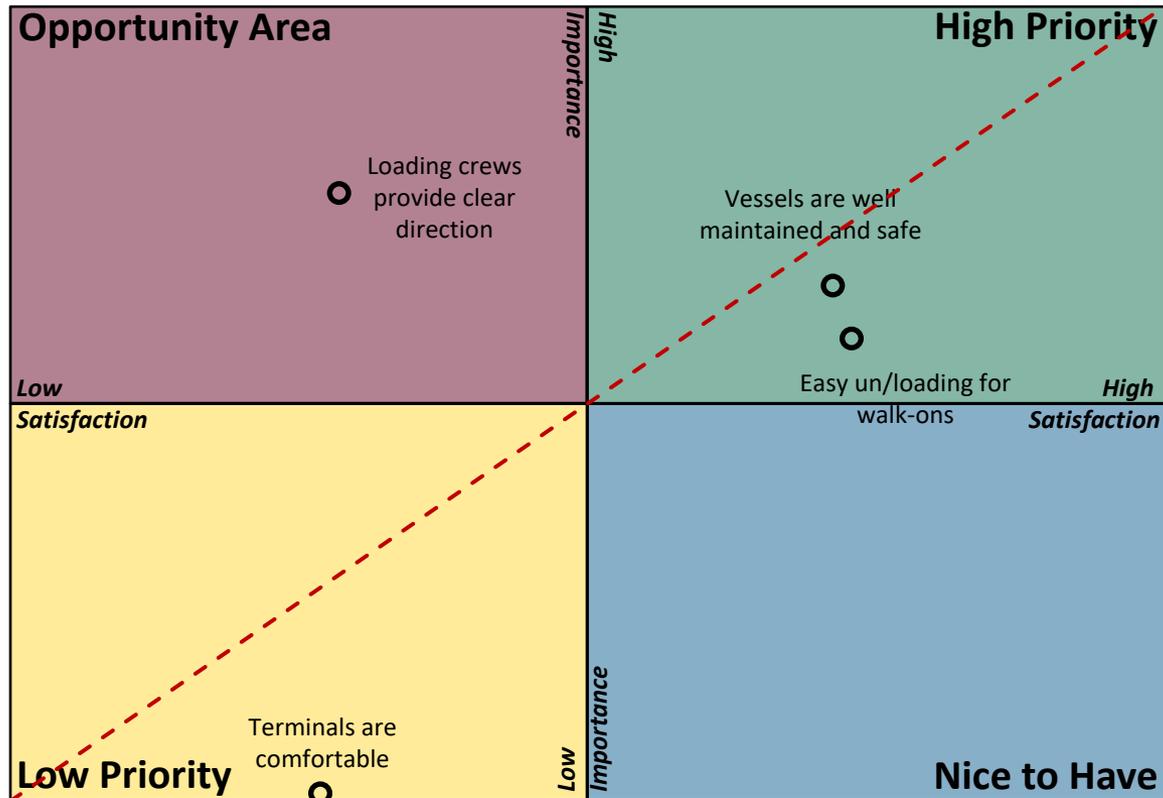


Gap Analysis: Fauntleroy/ Vashon - 2018



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)

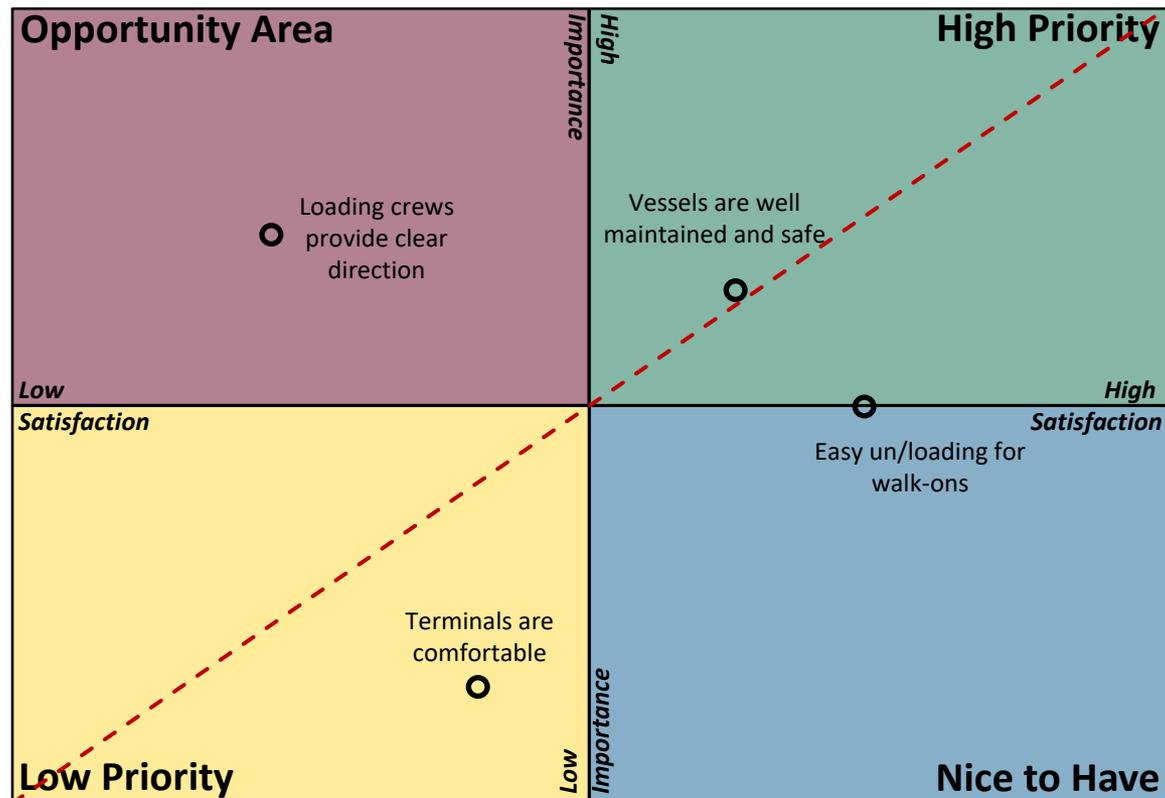


Gap Analysis: Fauntleroy/ Vashon - 2016



“Loading crews providing clear directions” is the top opportunity area for Fauntleroy/Vashon riders.

Satisfaction vs. Importance Ratings (n=157 - 250)

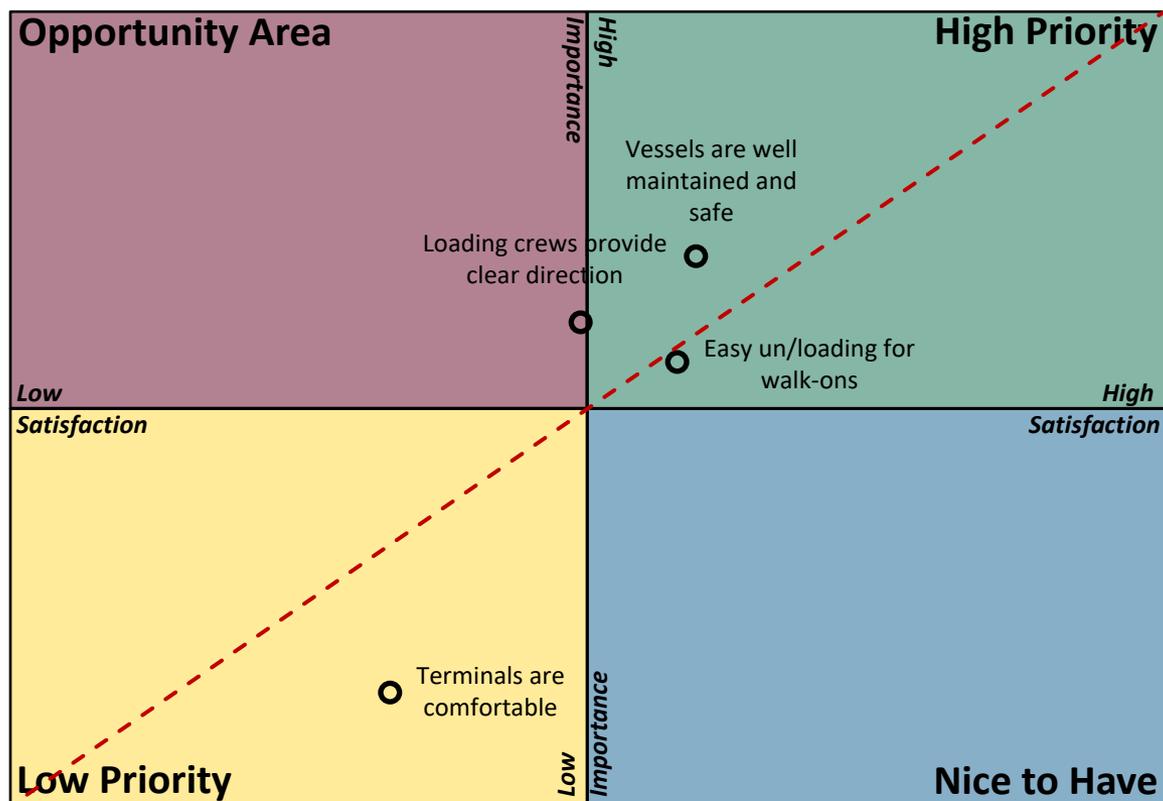


Gap Analysis: Fautleroy/ Southworth - 2018



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)

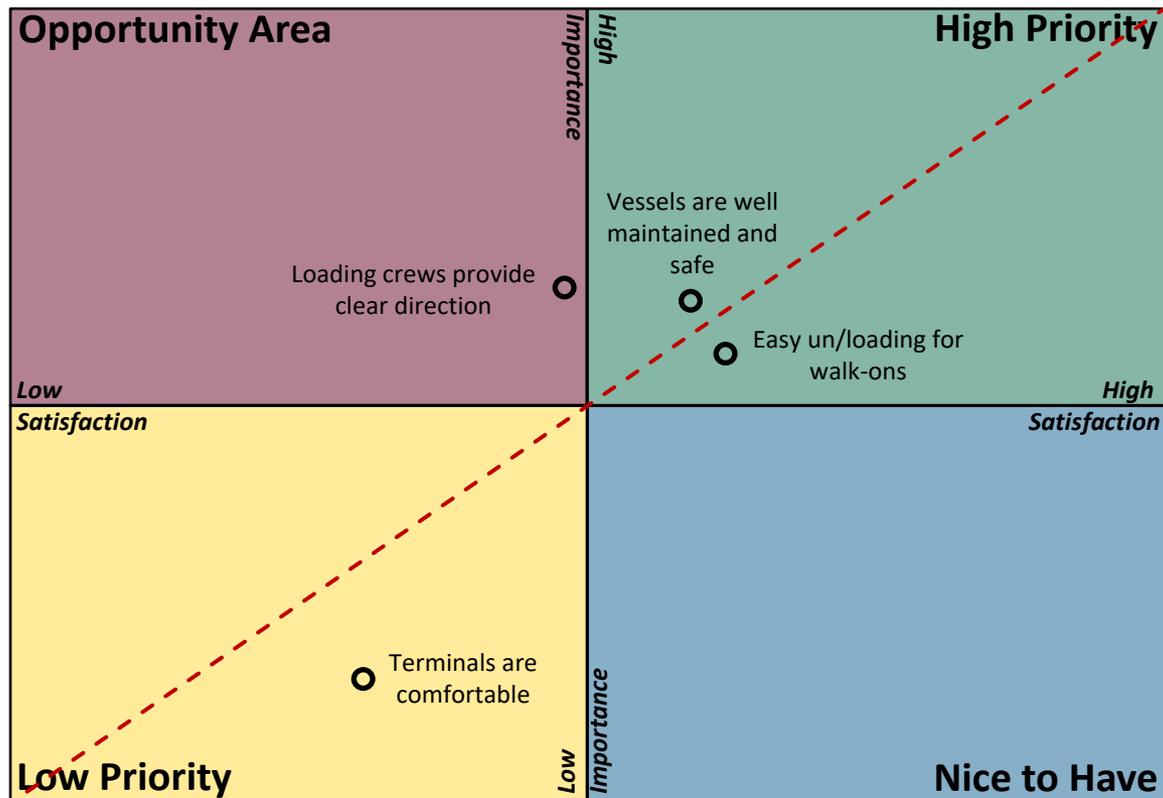


Gap Analysis: Fauntleroy/ Southworth - 2016



For Fauntleroy/Southworth riders, loading crews providing clear directions is the top opportunity area.

Satisfaction vs. Importance Ratings (n=86 - 153)

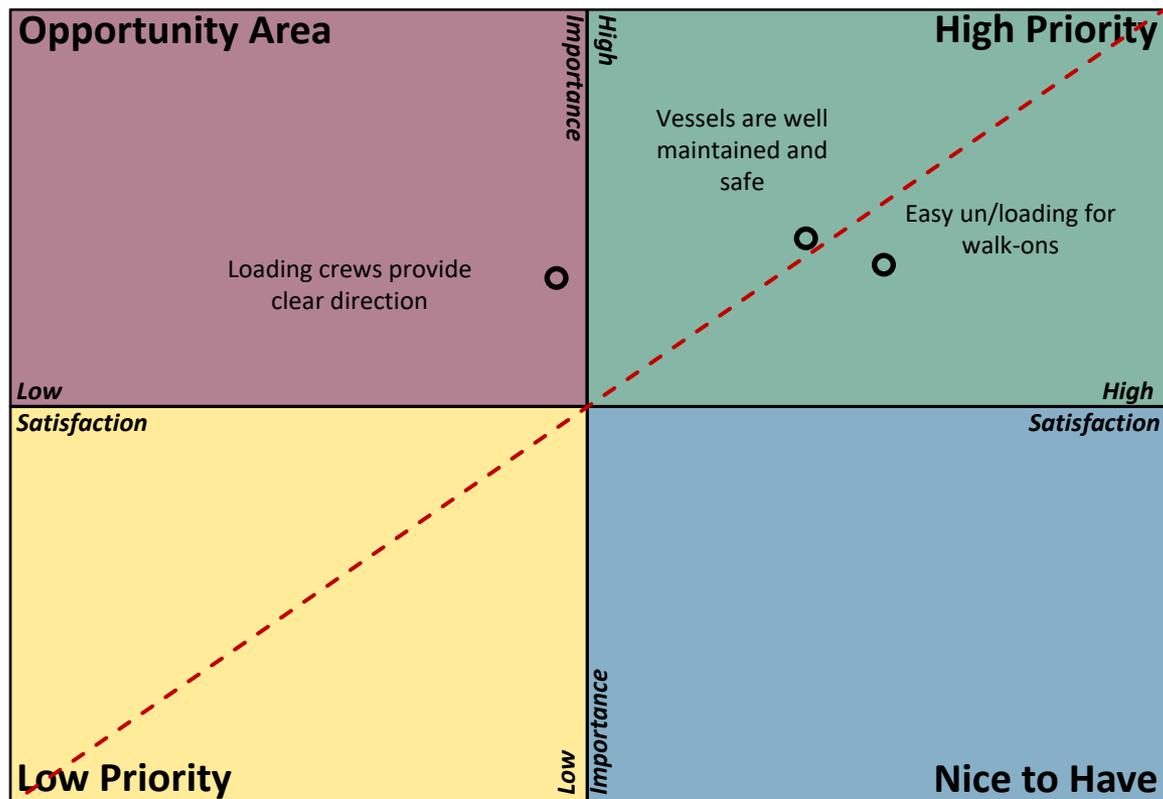


Gap Analysis: Southworth/ Vashon - 2018



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

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



○

Terminals are Comfortable*

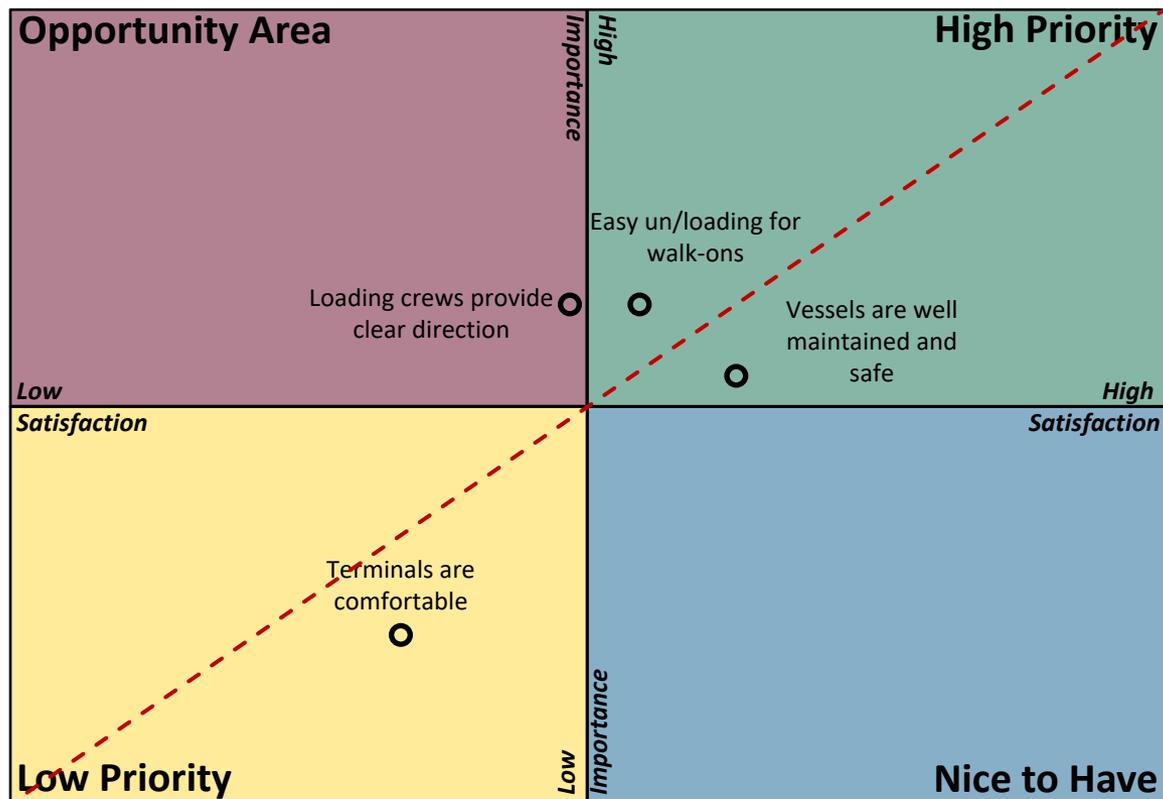
* Satisfaction scores outside of graph area

Gap Analysis: Southworth/ Vashon - 2016



Southworth/Vashon summer riders top opportunity area is loading crews provide clear directions

Satisfaction vs. Importance Ratings (n=14 - 20)

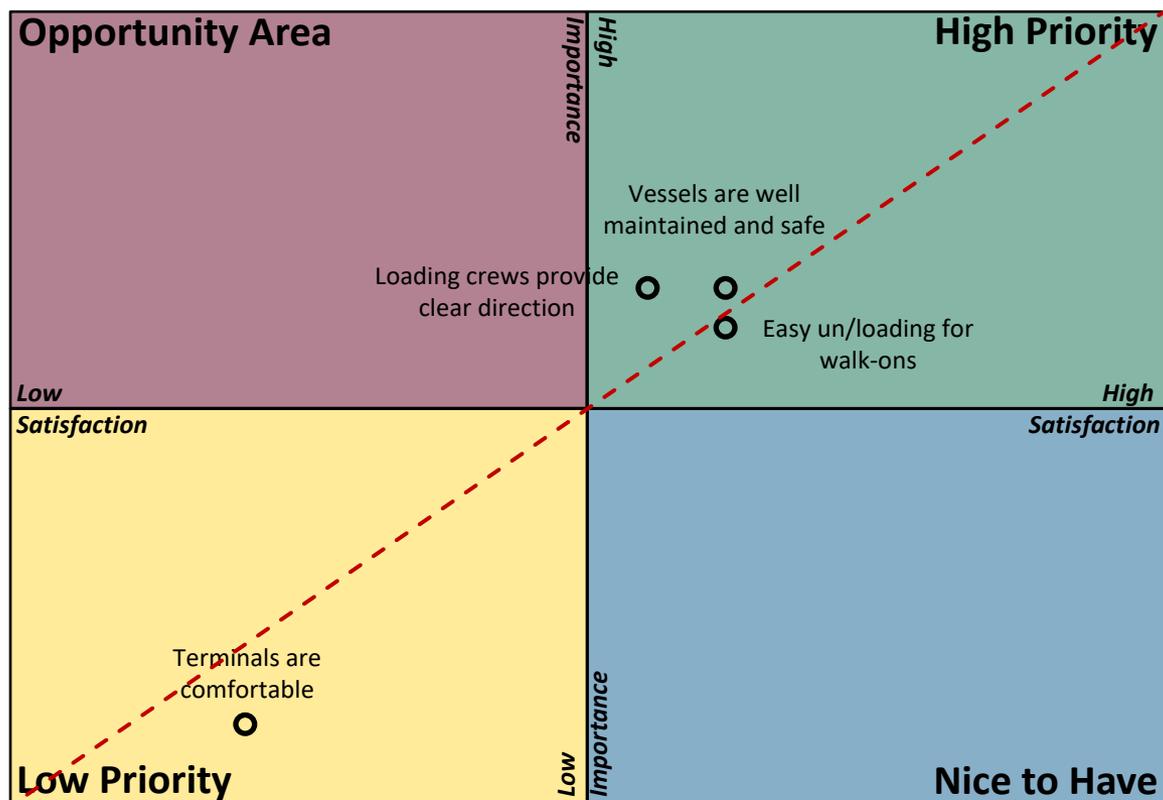


Gap Analysis: Coupeville/ Port Townsend - 2018



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)

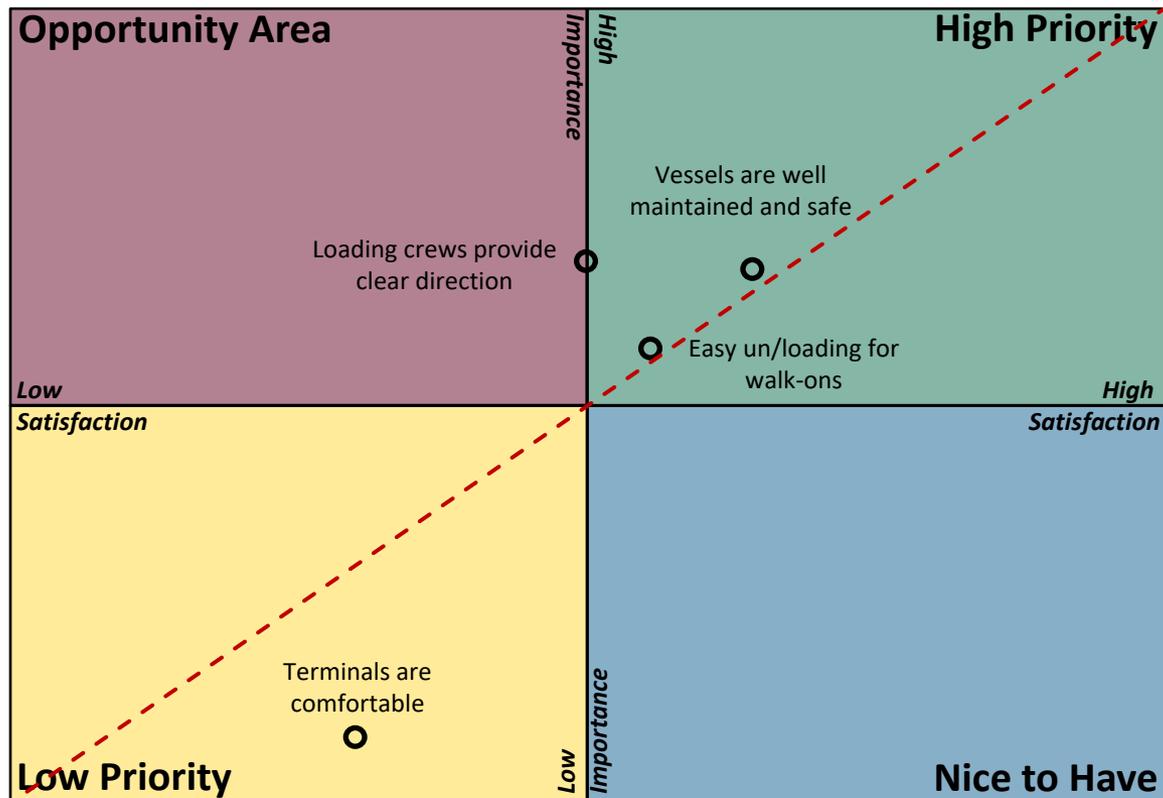


Gap Analysis: Coupeville/ Port Townsend - 2016



“Loading crews providing clear directions” is the top opportunity area for Coupeville/Pt. Townsend summer riders.

Satisfaction vs. Importance Ratings (n=134 - 322)

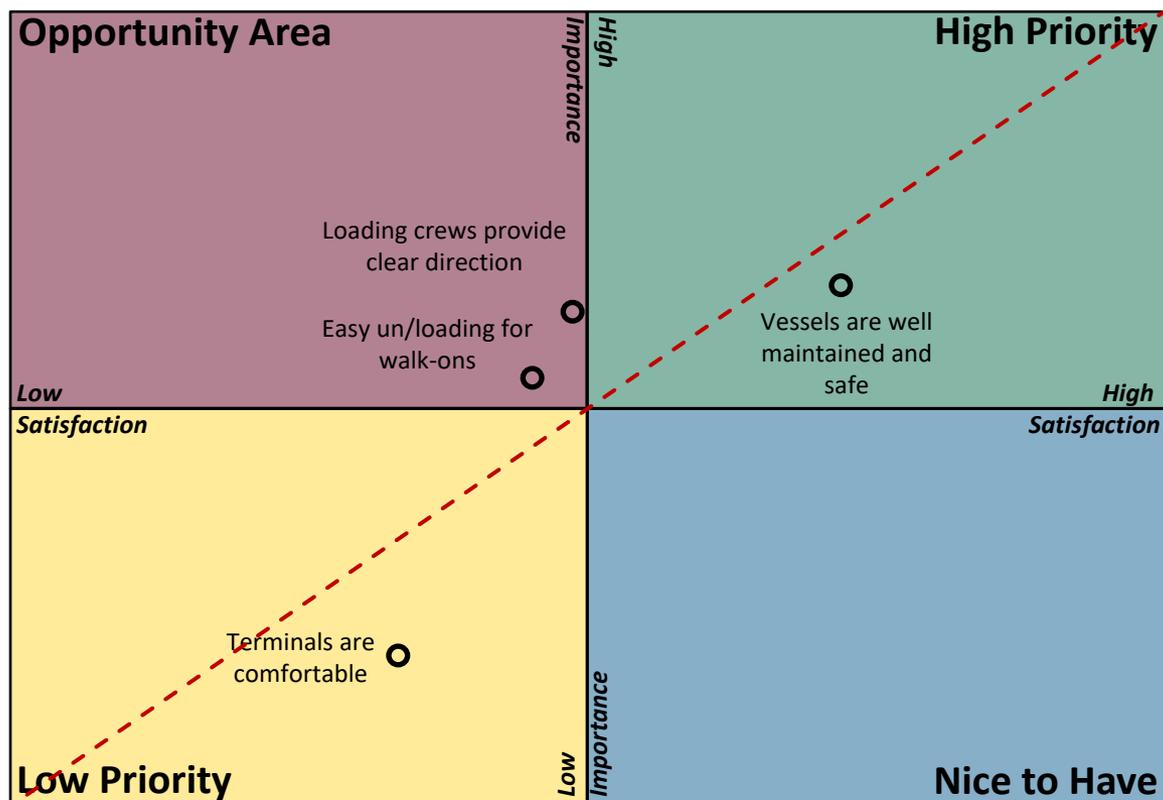


Gap Analysis: Mukilteo/ Clinton - 2018



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)

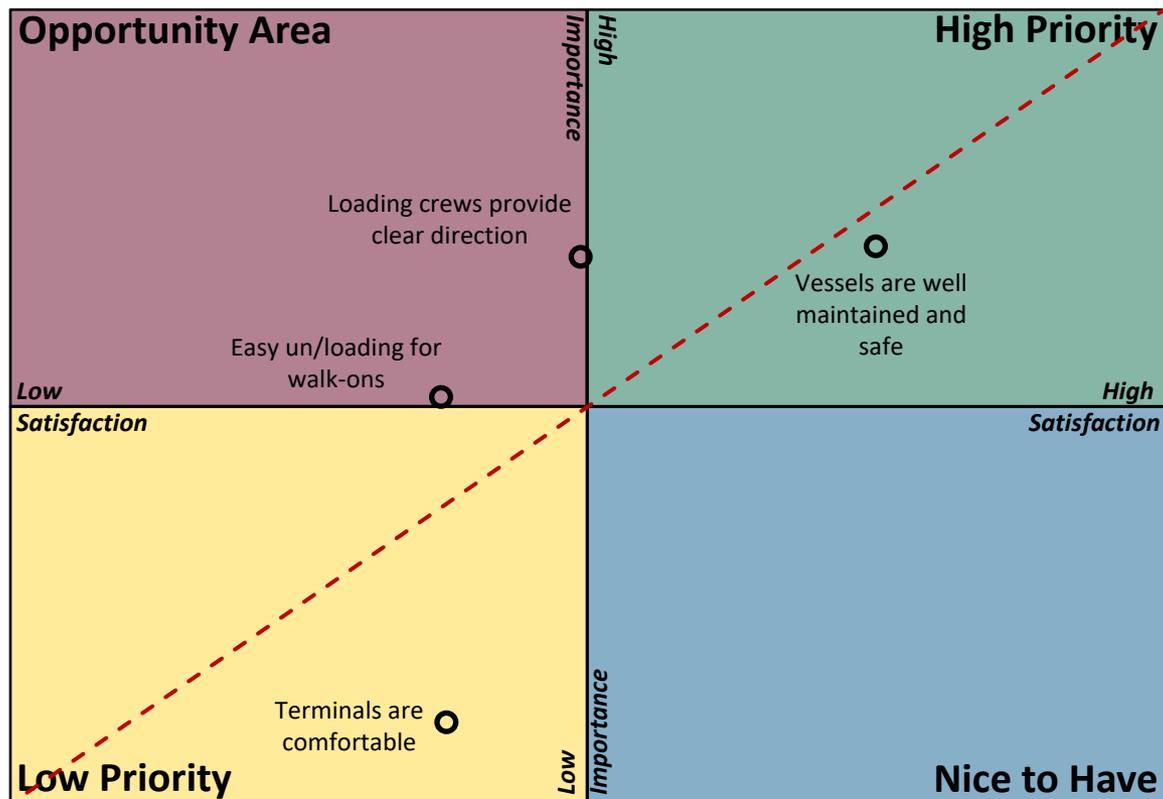


Gap Analysis: Mukilteo/ Clinton - 2016



For Mukilteo/Clinton summer riders, “loading crews providing clear directions” and “easy loading and unloading for walk-ons” are the opportunity areas.

Satisfaction vs. Importance Ratings (n=396 - 649)

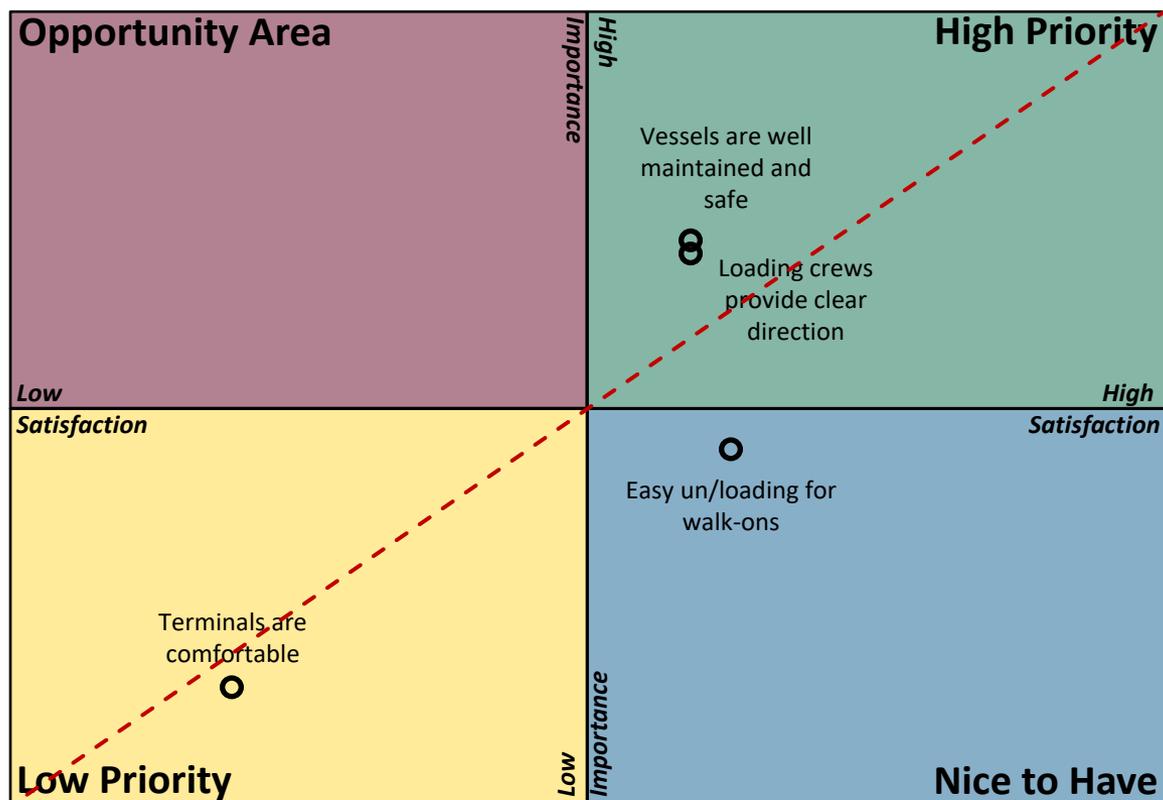


Gap Analysis: Anacortes/ San Juan Islands - 2018



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)

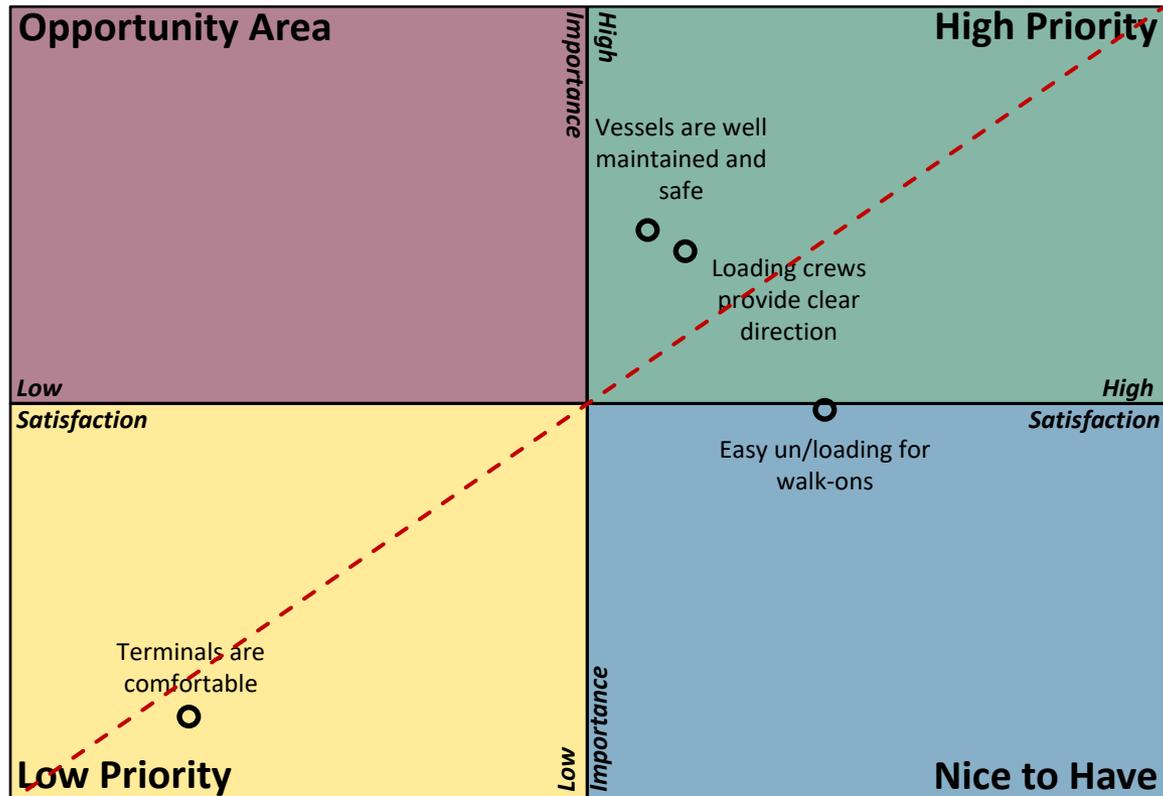


Gap Analysis: Anacortes/ San Juan Islands - 2016



“Vessels that are well maintained and safe” and “loading crews providing clear directions” stand out as the high priority areas for Anacortes/ San Juan Islander 2016 summer riders

Satisfaction vs. Importance Ratings (n=630 - 1558)

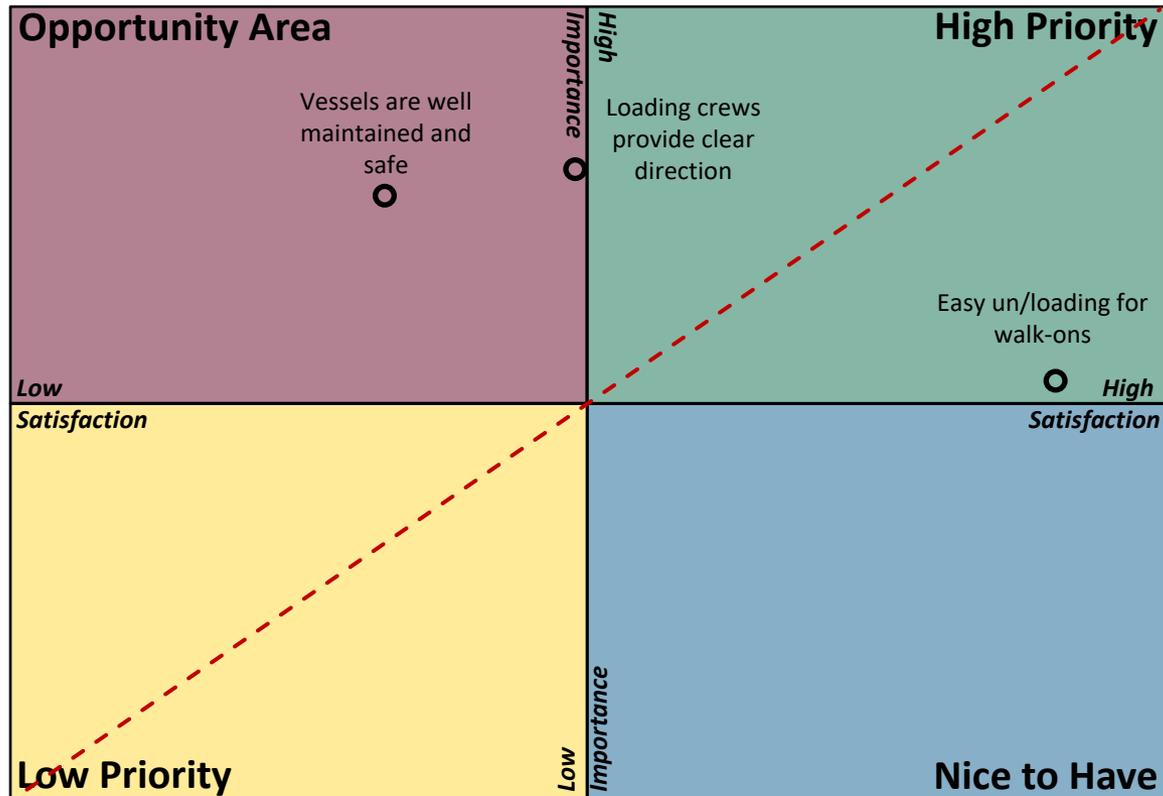


Gap Analysis: San Juan Interisland - 2018



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*

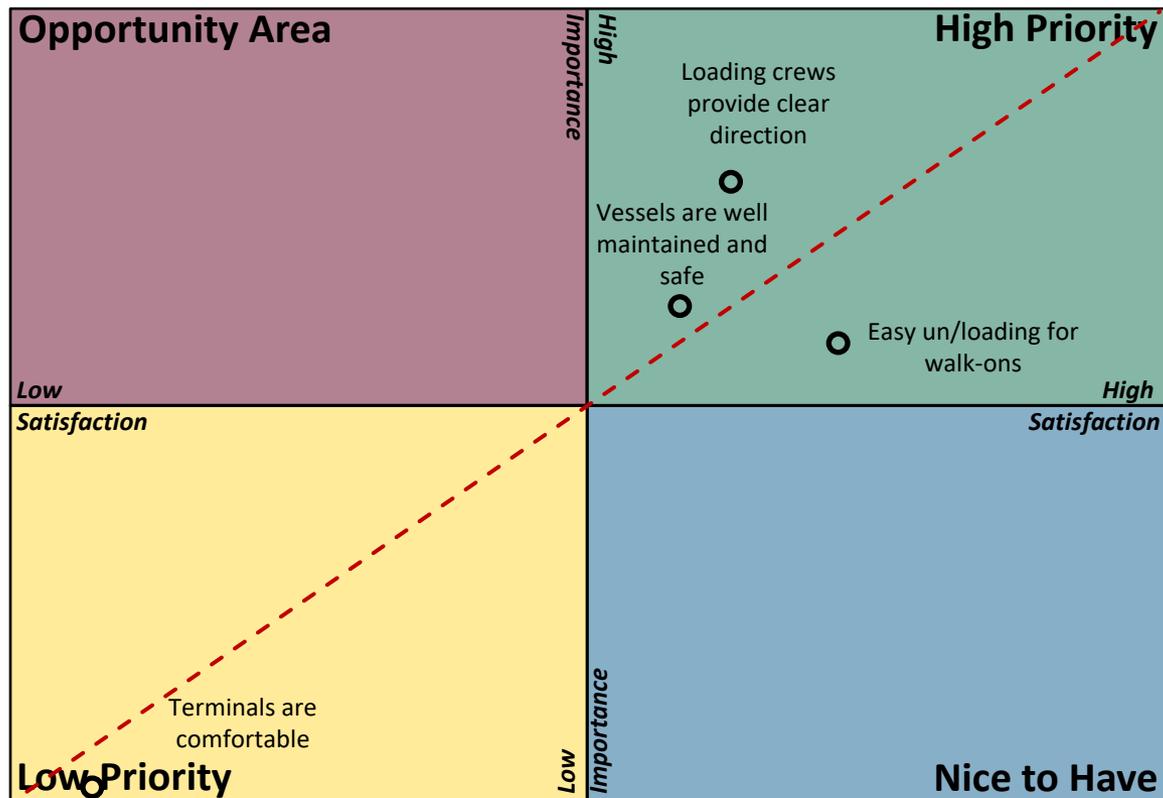
* Satisfaction scores outside of graph area

Gap Analysis: San Juan Interisland - 2016



Among San Juan Interisland riders, keeping “vessels well maintained and safe” along with “loading crews providing clear directions,” are the high priority areas.

Satisfaction vs. Importance Ratings (n=45 - 75)

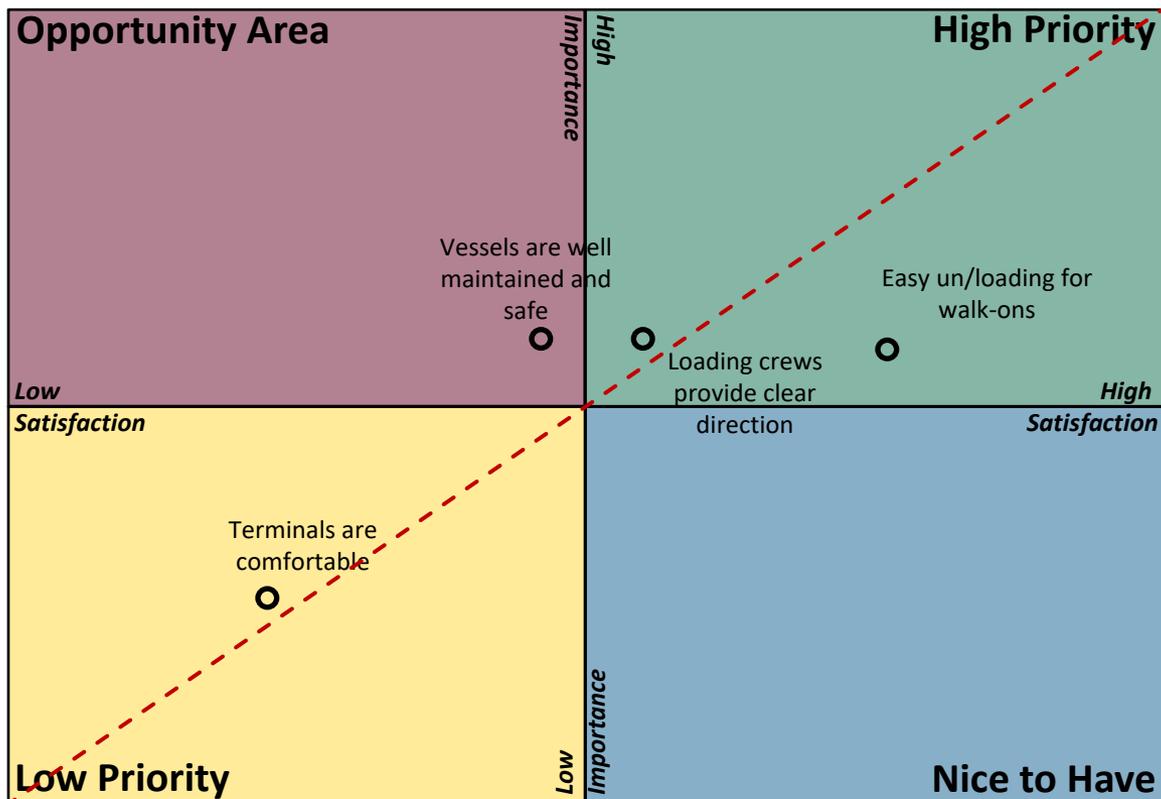


Gap Analysis: Anacortes/ Sidney B.C. - 2018



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)

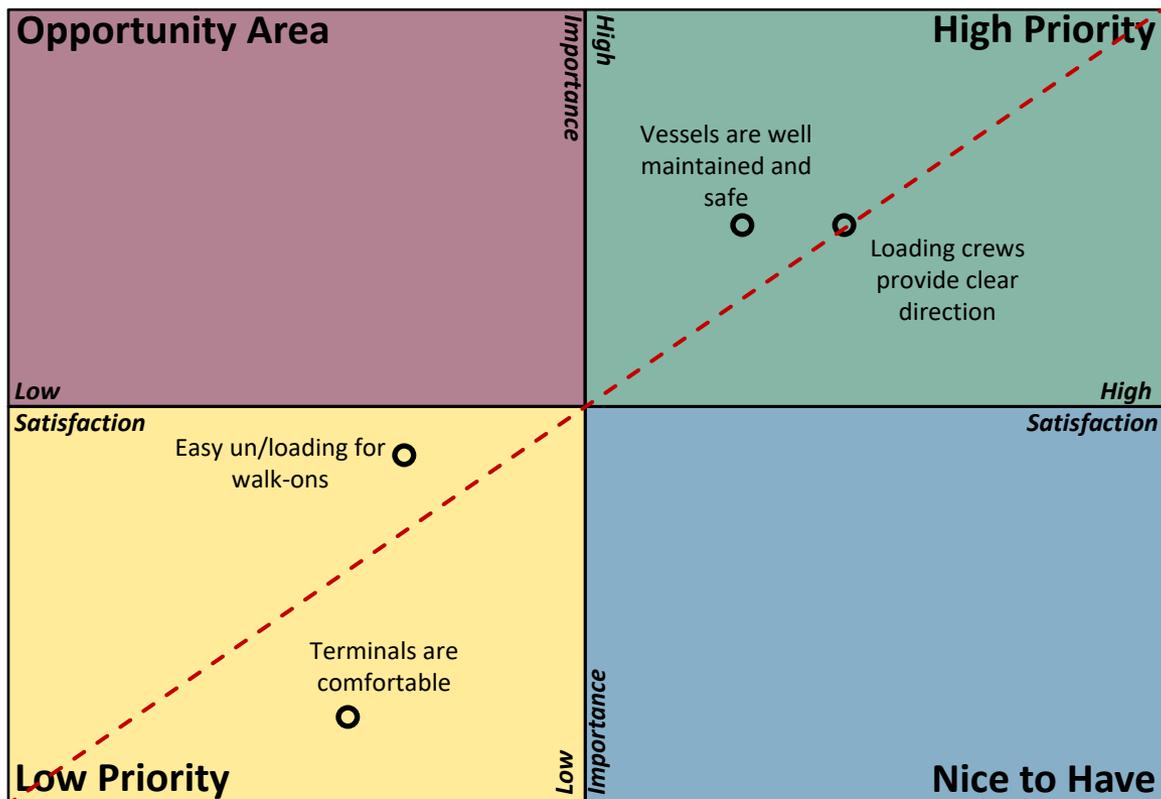


Gap Analysis: Anacortes/ Sidney B.C. - 2016



"Easy loading and unloading" is just barely an area for opportunity among Anacortes/ Sidney BC riders

Satisfaction vs. Importance Ratings (n=29 - 89)



Attribute Ratings by Route



- ❖ 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.

Terminals are comfortable



Dissatisfaction with terminals' 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%
2016	Dissat.	16%	24%	25%	9%	9%	8%	4%	4%	6%	7%	24%	5%	14%
Change	Dissat.	+12%	+24%	+19%	-4%	+11%	+4%	+8%	+5%	+4%	+3%	+1%	+8%	-2%

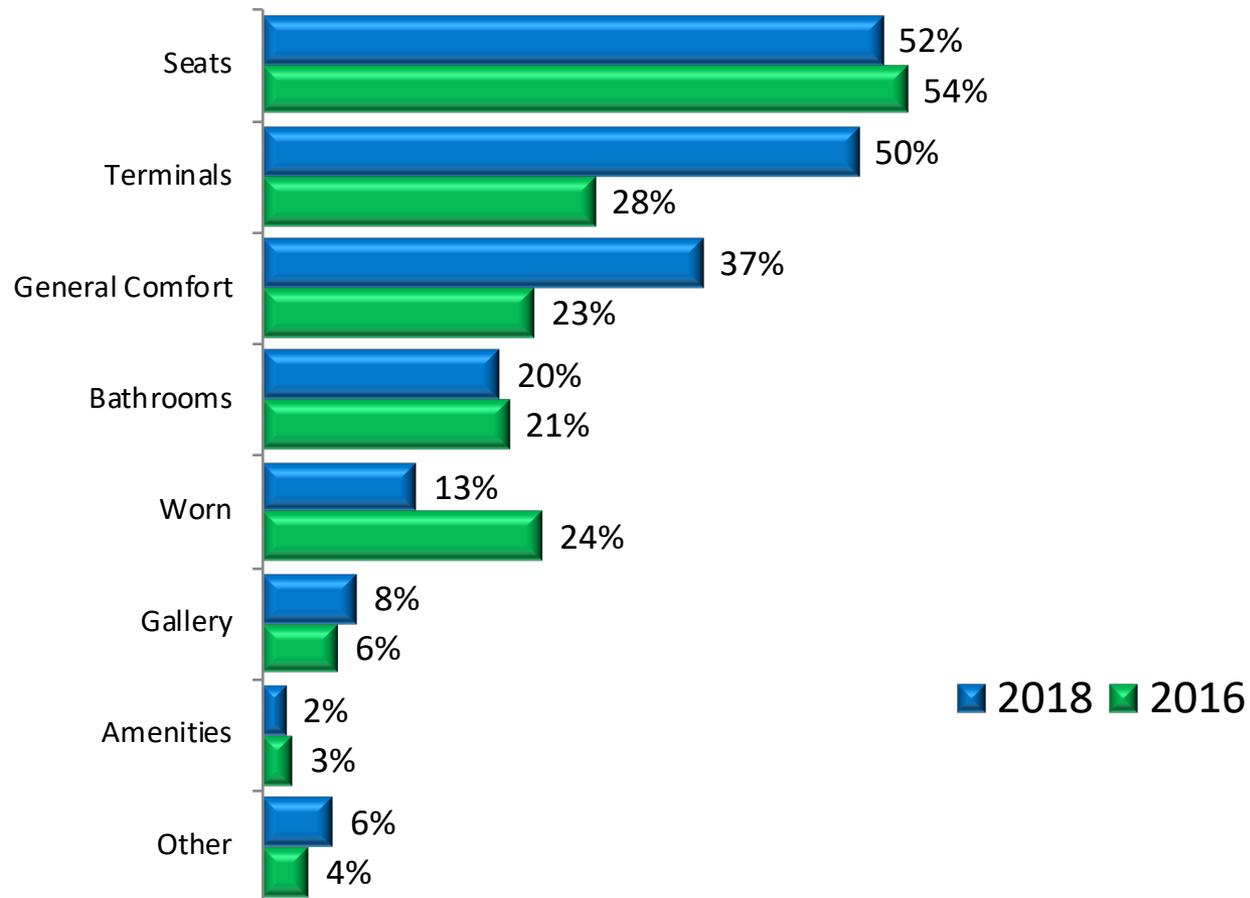
Top 3 Unsatisfactory Terminals	
Seattle	77%
Bainbridge	9%
Anacortes	9%

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 they customer service is non-existent at best.

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)

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)	88%	91%	90%	82%	87%	85%	89%	96%	91%	88%	79%	76%	99%
	Sat. (4-5)	61%	48%	55%	65%	69%	76%	70%	88%	85%	67%	65%	82%	100%
	Dissat. (1-2)	13%	23%	14%	2%	9%	7%	14%	3%	4%	11%	5%	2%	0%
2016	Dissat.	14%	21%	16%	10%	6%	7%	10%	0%	5%	15%	8%	5%	4%
Change	Dissat.	-1%	+2%	-2%	-8%	+3	0%	+4%	+3%	-1%	-4%	-3%	-3%	-4%

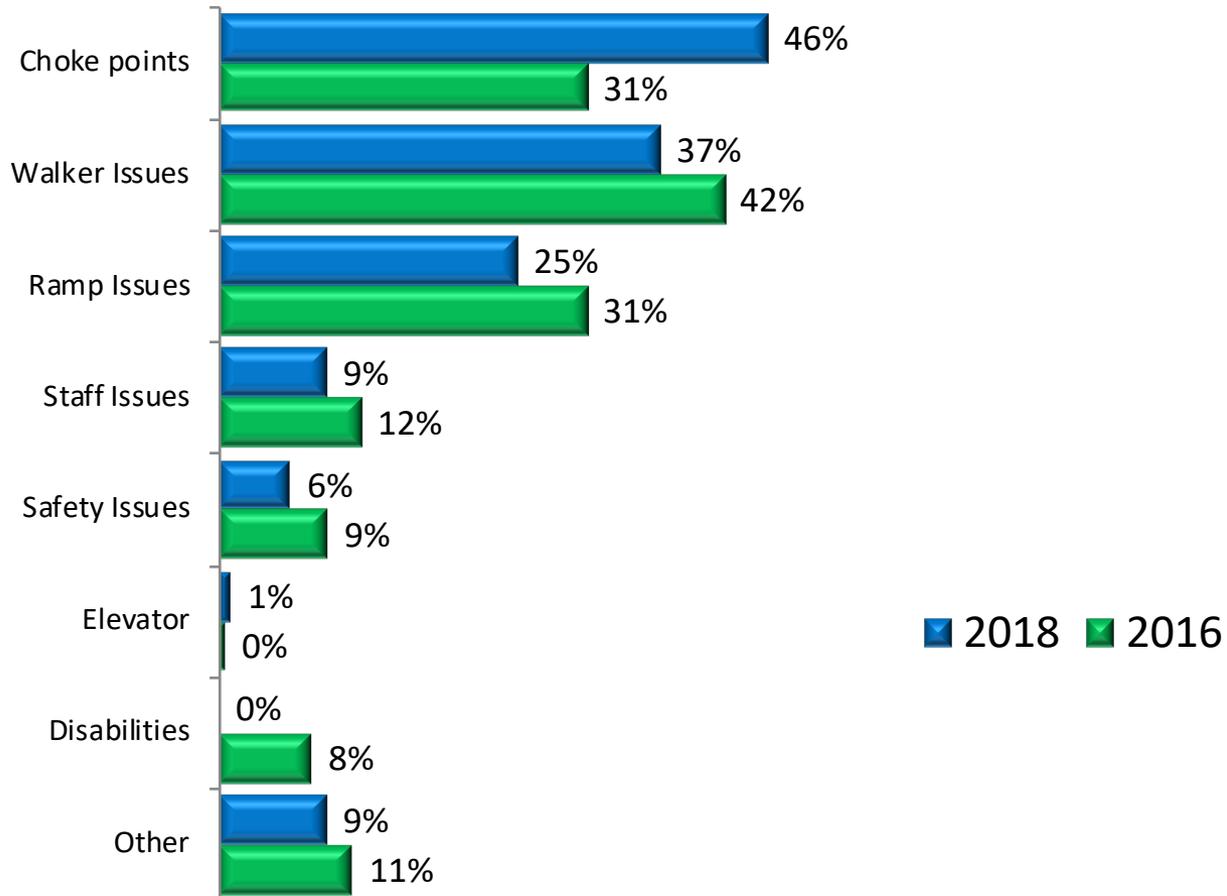
Top 3 Unsatisfactory Terminals	
Seattle	69%
Bainbridge	18%
Bremerton	9%

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.

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)

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%
2016	Dissat.	11%	9%	8%	20%	8%	17%	15%	6%	9%	14%	13%	22%	2%
Change	Dissat.	+1%	+1%	-1%	+4%	+1%	+3%	-4%	+10%	-2%	-2%	+4%	+3%	+12%

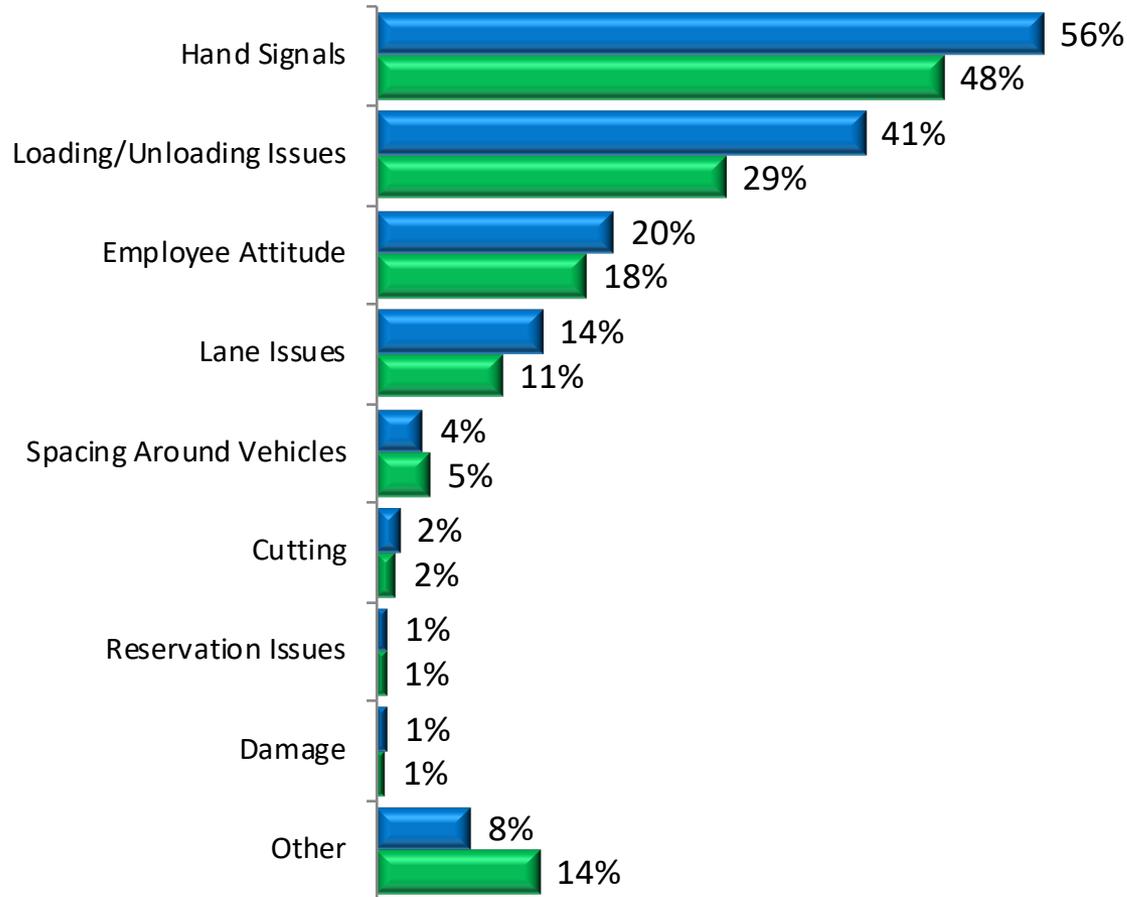
Top 3 Unsatisfactory Terminals	
Seattle	25%
Fautleroy	21%
Mukilteo	17%

Example of Verbatim Complaints	
Fautleroy	2 deck hands each pointing a different direction
Fautleroy	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.
Fautleroy	Every deck person has a different system and they get frustrated when people cant tell what they want them to do.
Anacortes	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.
Mukilteo	Not enough crew onboard directing cars HOW to park. Results in extra space so fewer vehicles on board and longer wait times.
Pt Defiance, Tahlequah, Fautleroy	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!
Orcas, Anacortes	Rudeness and lack of experience by employees directing for parking.

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)

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)	93%	94%	93%	89%	91%	89%	92%	98%	94%	95%	95%	90%	100%
	Sat. (4-5)	71%	70%	61%	82%	69%	75%	65%	84%	85%	83%	63%	47%	76%
	Dissat. (1-2)	9%	10%	14%	8%	9%	7%	8%	6%	5%	3%	14%	19%	5%
2016	Dissat.	11%	12%	26%	8%	12%	3%	4%	7%	5%	4%	15%	10%	10%
Change	Dissat.	-2%	-2%	-12%	0%	-3%	+4%	+4%	-1%	0%	-1%	-1%	+9%	-5%

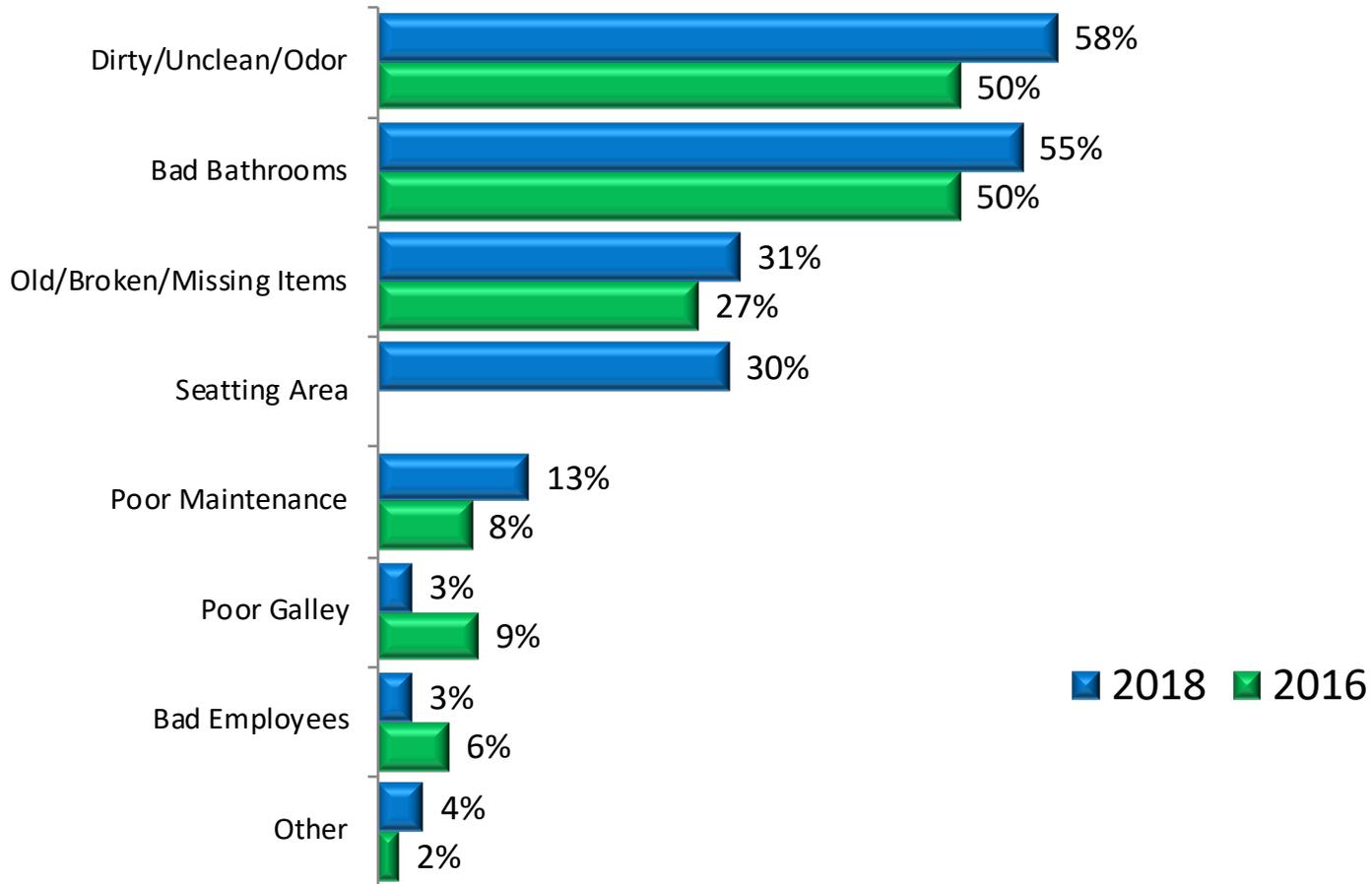
Top 4 Unsatisfactory Vessels	
Don't recall name	43%
Chimacum	12%
Tacoma	11%
Wenatchee	9%

Example of Verbatim Complaints	
Chimacum	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.
Chimacum	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.
Tacoma	Restrooms dirty, leaky toilets, dirty passenger seats
Tacoma	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.
Wenatchee, Tacoma	On both boats, the men's bathroom's 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.
Wenatchee, Tacoma	Overall condition of boat and bathrooms is shabby at best and just dirty at worst.

Vessel Issues Mentioned



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



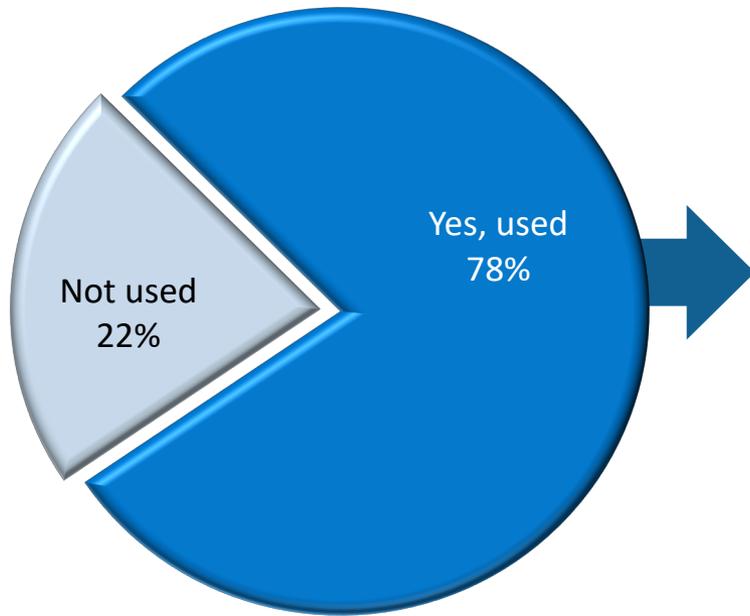
Q59c. What specific (vessel) conditions made you dissatisfied? (Multiple Response, n=425)

Using WSF Website

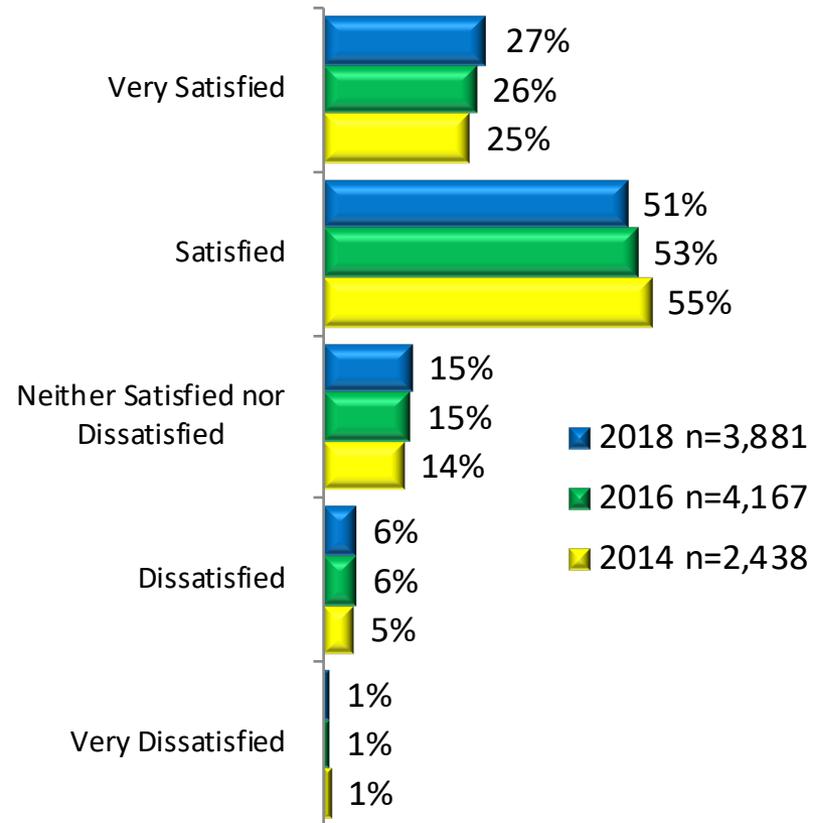


More than three quarters of summer riders (78%) have used the WSF website and a majority (78%) say they are satisfied with their experience (only 7% are dissatisfied with their website experience).

Used WSF Website
n=4,672



Experience Using Website



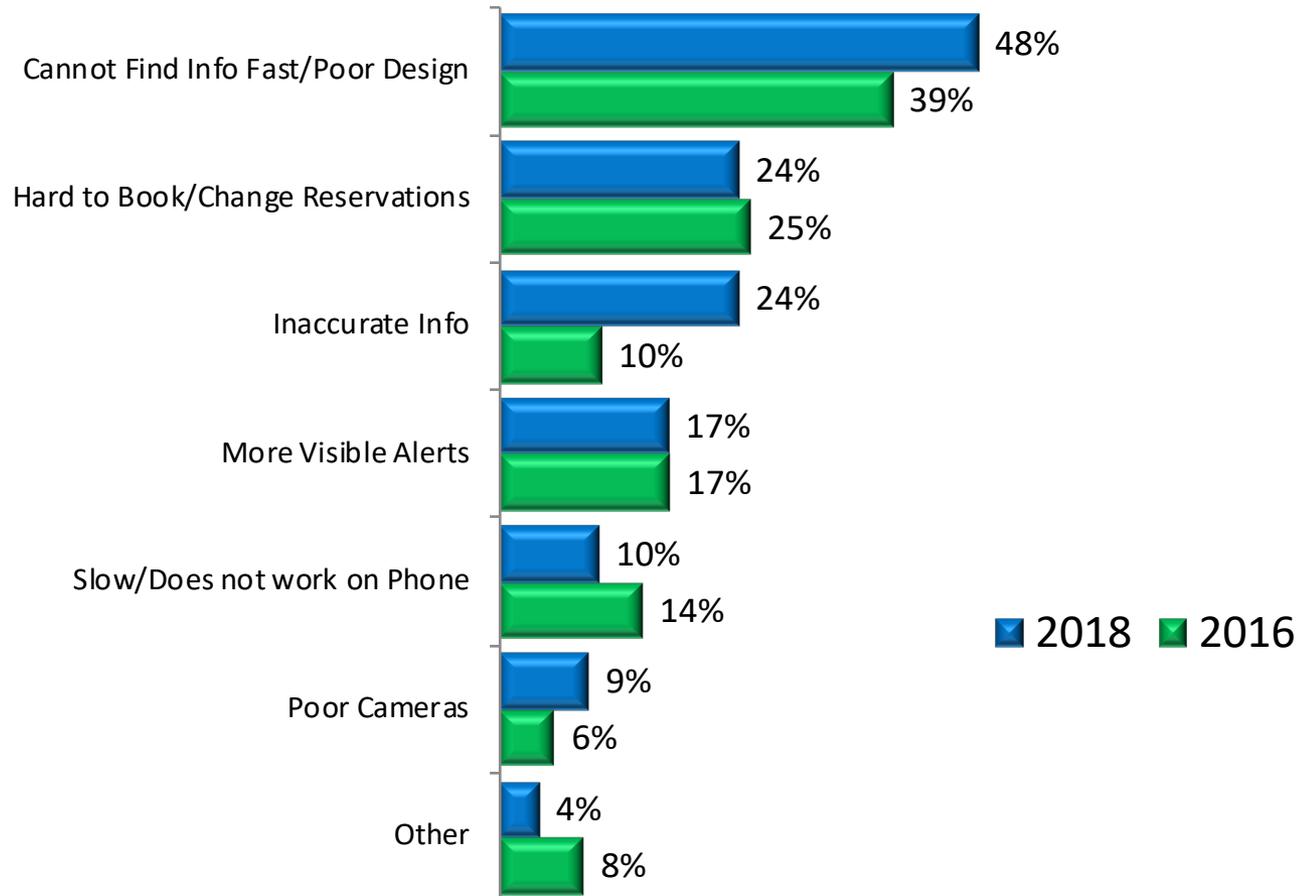
Q65. have you for any reason used the WSF website?

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

Website Issues Mentioned



The ability to find information (48%) and hard to book or change reservations (24%) and inaccurate information (24%) were the top mentioned reasons for their dissatisfaction.



Q67. What specifically about your experience with the WSF website made you dissatisfied? Please be as specific as possible. (n=318)

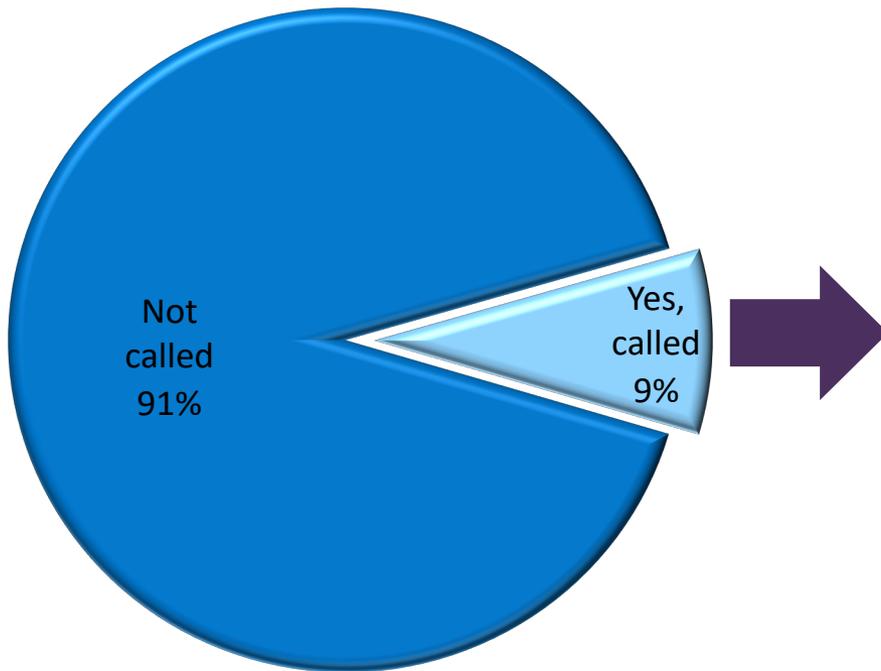
Calling WSF Customer Service by Phone



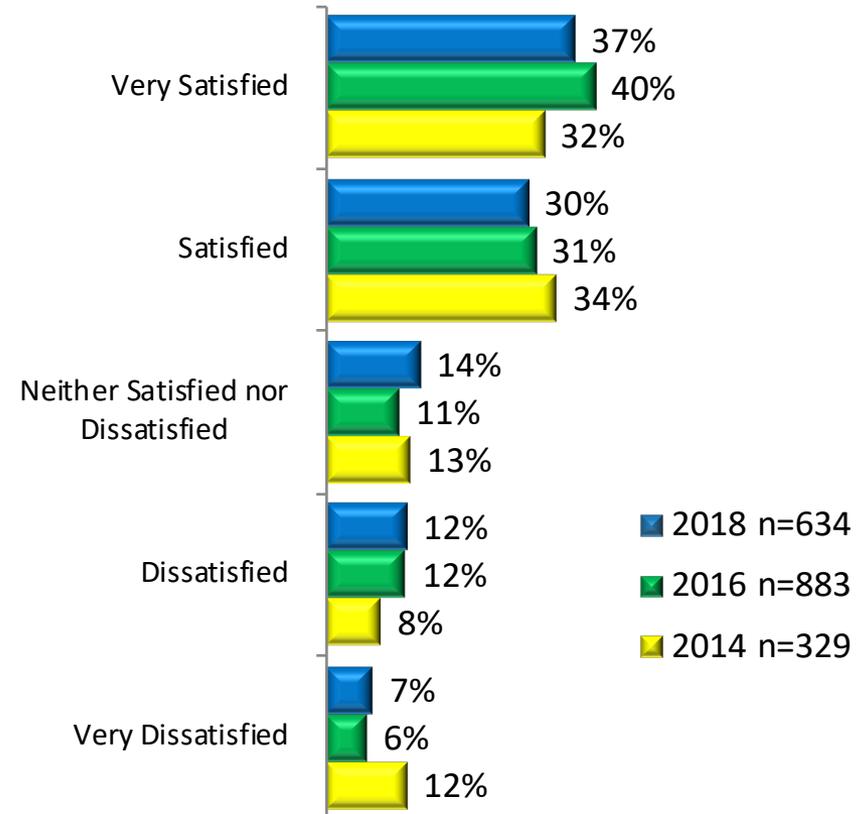
Very few respondents (9%) have contacted WSF customer service by phone. Of those respondents who have called, the majority are satisfied with their experience (67%). However, almost one in five (19%) are dissatisfied with their call.

Called WSF Customer Service

n=4,672



Experience Calling WSF



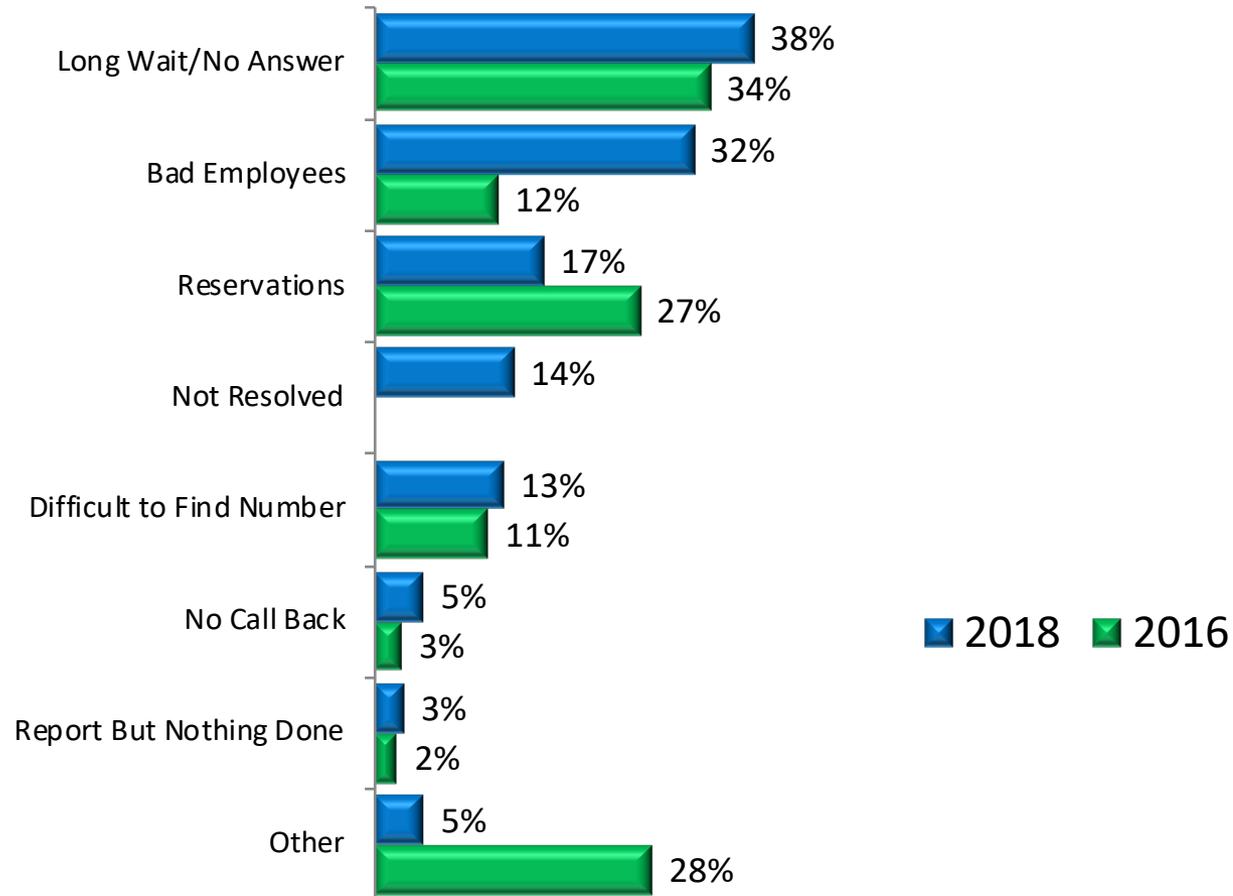
Q65B. During the Summer period, have you for any reason called WSF by phone?

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

Phone Issues Mentioned



No answer or long wait times (38%), bad employees (32%), and issues around reservations (17%) topped the list of phone complaints among people who are dissatisfied.



Q69. What specifically about your experience calling WSF by phone made you dissatisfied? (Multiple Response, n=105)

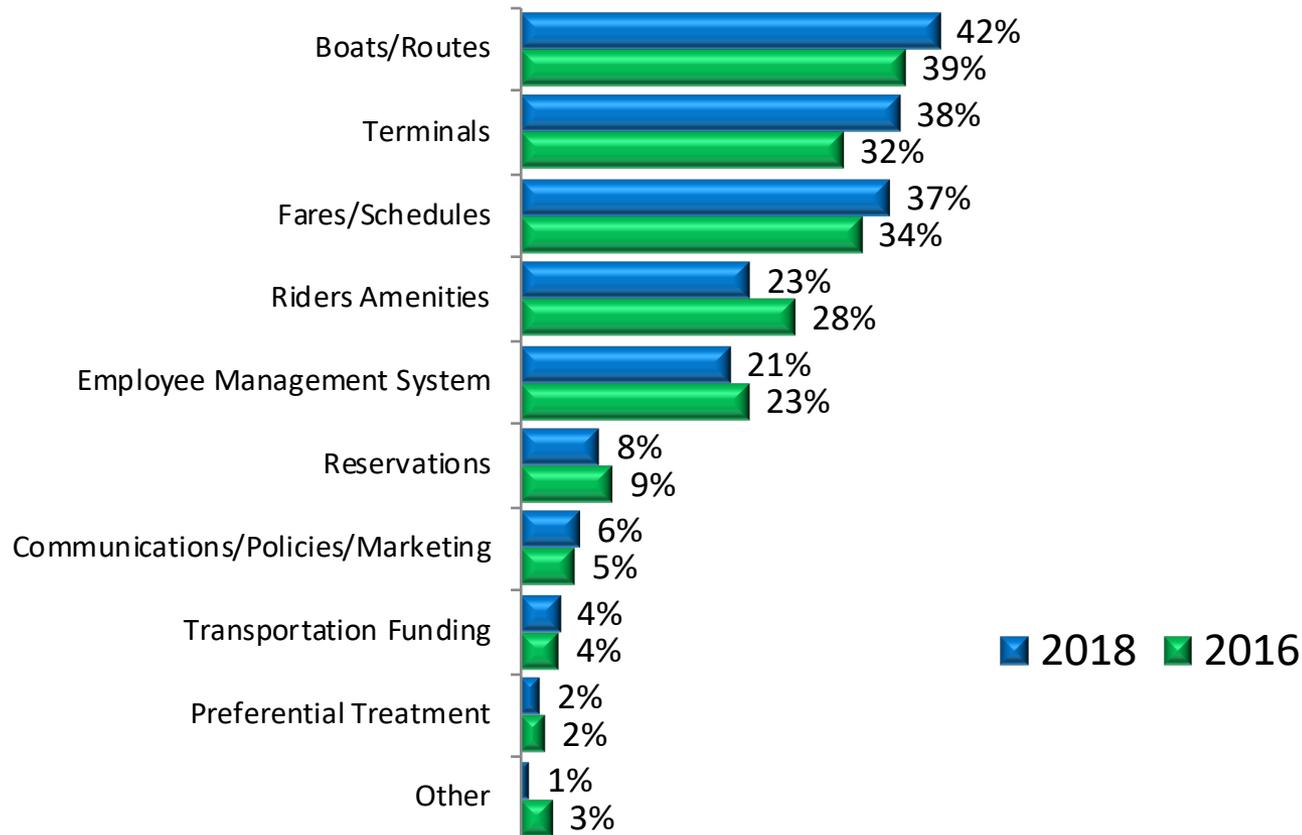


Additional Rider Comments

Suggested Areas to Improve Service



Suggestions for improving WSF service fell into three broad areas: improving boats/route performance(42%), improving terminals (38%), and providing better fare/schedules (37%) for riders.

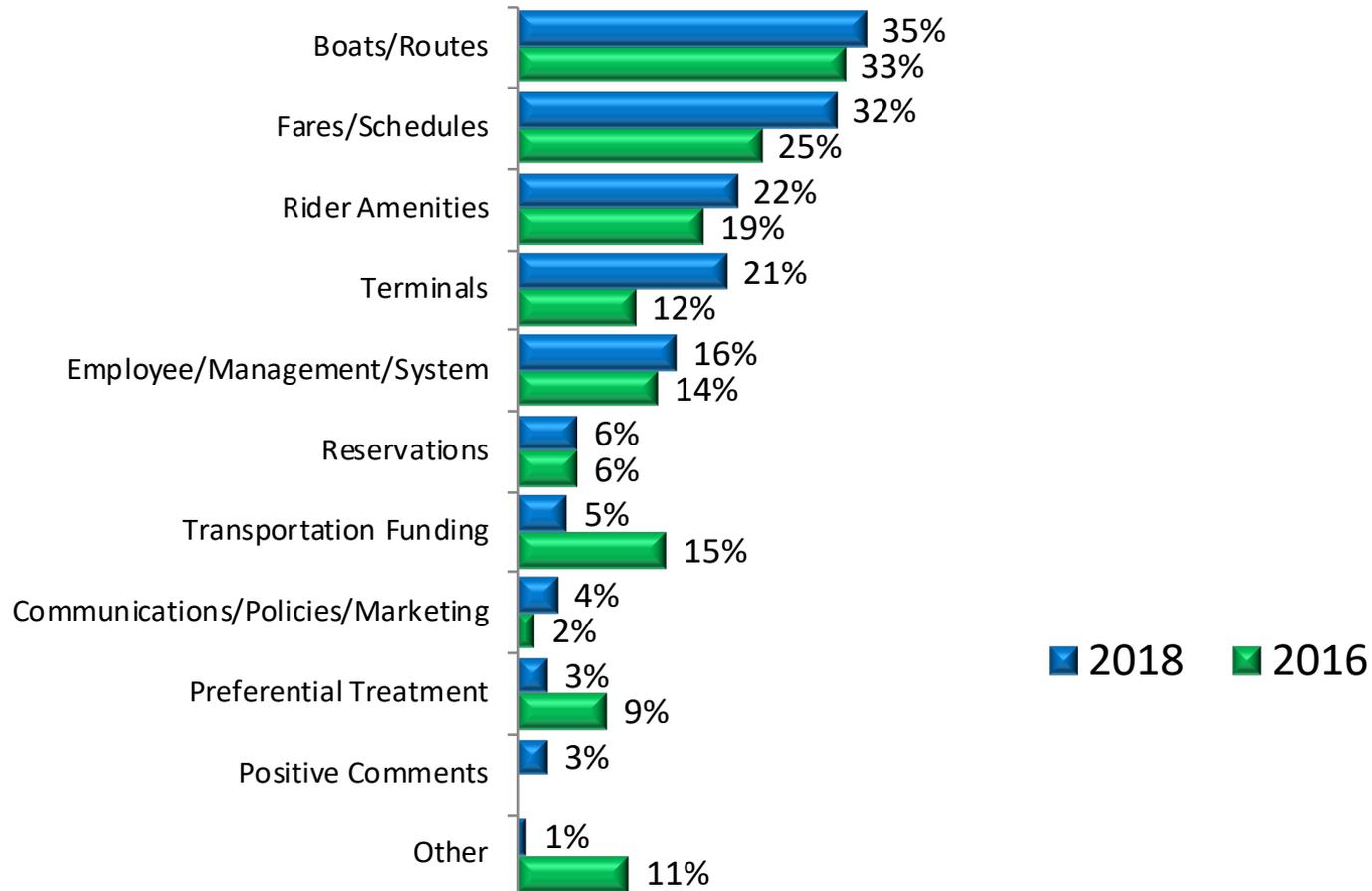


Q70. Beyond lowering fares, what other suggestions might you give WSF and state decision makers that would improve or strengthen WSF customer service? (Multiple Response, n=3,146)

Additional Issues Mentioned



The top three additional issues riders gave center around boats/routes (35%), fares/schedules (32%), rider amenities (22%), and terminals (21%).



Q80. Do you have any additional thoughts regarding the ferry system you would like to share? (Multiple Response, n=1,029)

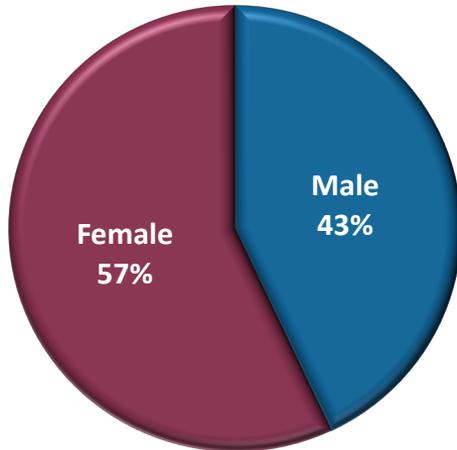


Demographics

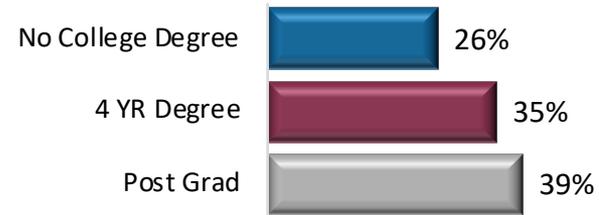
Sample Makeup – Demographics - 2018



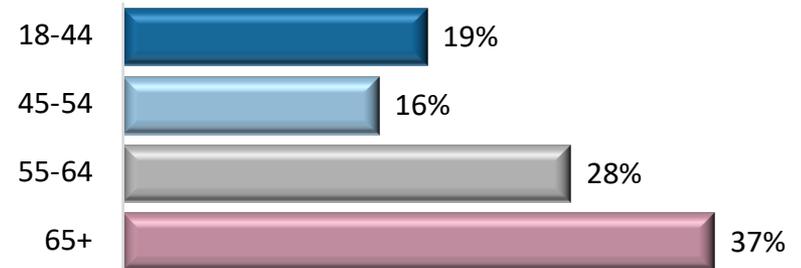
Gender



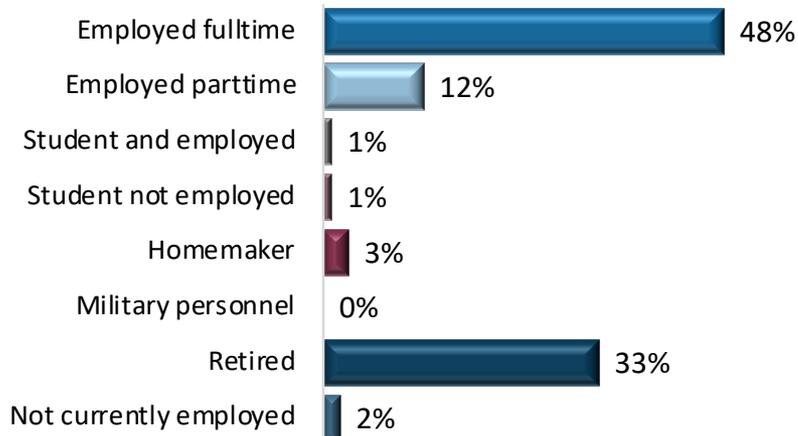
Education



Age



Employment



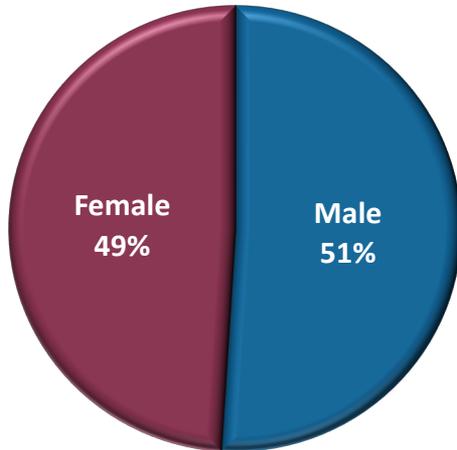
Ethnicity



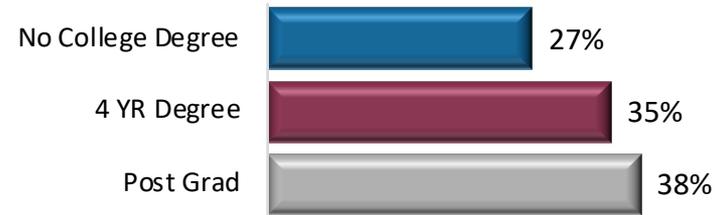
Sample Makeup – Demographics - 2016



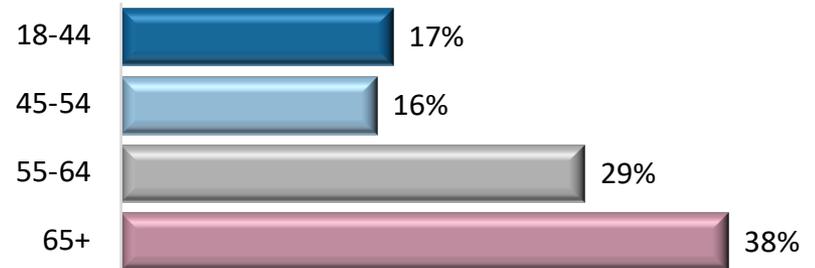
Gender



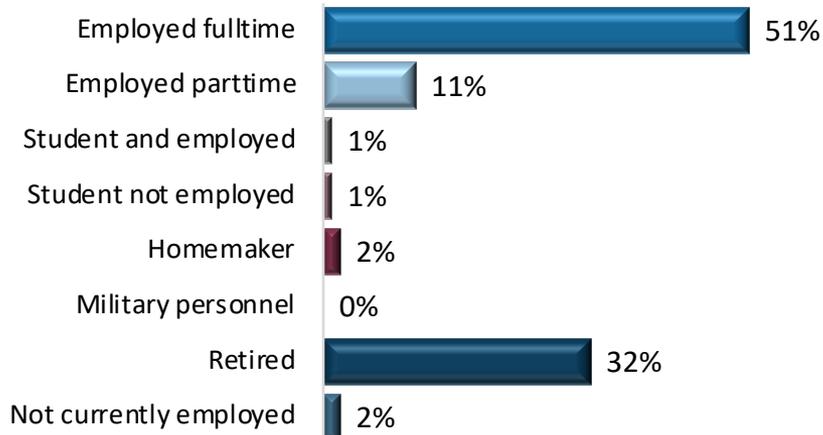
Education



Age



Employment



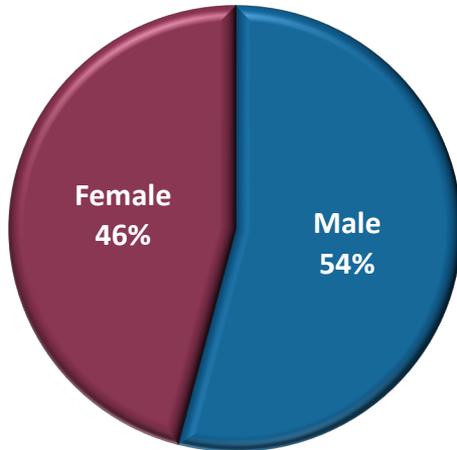
Ethnicity



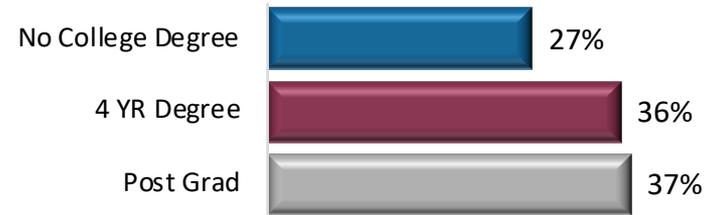
Sample Makeup – Demographics - 2014



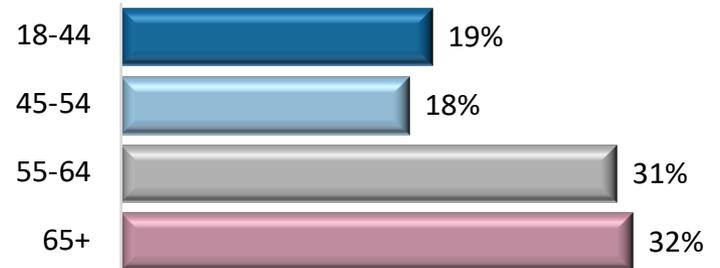
Gender



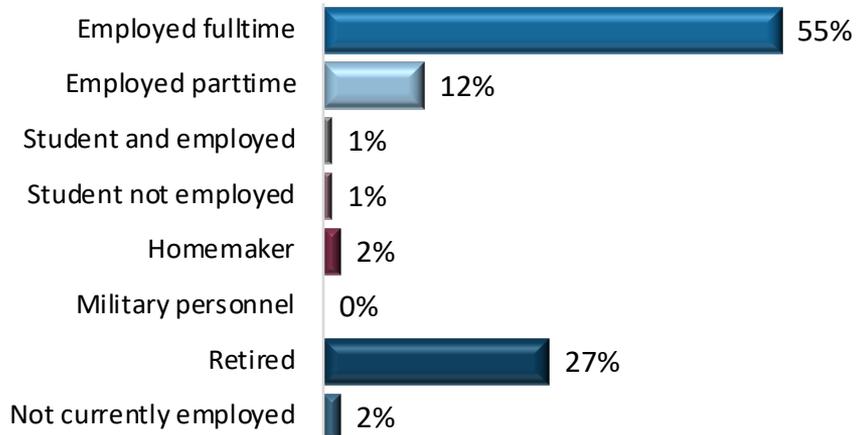
Education



Age



Employment



Ethnicity





Weighting Methodology

Weighting Methodology - Panel



- In order to make the survey results proportionate to the actual ferry ridership universe as a whole during the summer period, it was necessary to weight the data by route, boarding method, and ticket type based on their last trip taken. The weighting scheme displayed below summarizes the weights at the route/boarding method level.

Panel:	Vehicle Driver	Vehicle Passenger	Foot Passenger
Seattle/Bainbridge	1.178	3.135	1.099
Seattle/Bremerton	1.106	2.531	2.343
Point Defiance/Tahlequah	1.163	3.269	1.983
Edmonds/Kingston	1.239	3.328	1.688
Fauntleroy/Vashon	0.656	2.364	1.204
Fauntleroy/Southworth	0.925	1.996	0.612
Southworth/Vashon	1.379	0.267	1.912
Coupeville/Pt. Townsend	0.492	1.655	0.915
Mukilteo/Clinton	0.831	2.353	0.989
Anacortes/San Juan Islands	0.187	0.791	0.985
San Juan Interisland	0.871	0.365	0.000
Anacortes/ Sidney B.C.	0.589	1.727	6.131

Weighting Methodology - Onboard



Onboard:	Route Used
Seattle/Bainbridge	1.03
Seattle/Bremerton	1.45
Point Defiance/Tahlequah	0.83
Edmonds/Kingston	1.21
Fauntleroy/Vashon/Southworth	0.73
Coupeville/Pt. Townsend	0.37
Mukilteo/Clinton	1.35
Anacortes/San Juan Islands/Interisland	1.04