market decisions
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Washington State Transportation Commission

Ferry Riders Opinion Group (FROG) 2012 Customer Survey

Summary Report

Conducted by
Market Decisions Corporation

Preface

- The research initiative in 2012 consisted of the following main phases:
  - Winter Customer Survey (target audience: FROG panel members only)
  - Summer Customer Survey (target audience: FROG panel members & recreational/social riders)
- The main objective of the 2012 research initiative was to understand from the ferry riders' perspective their travel behavior, opinions and attitudes regarding important issues currently facing WSTC and WSF.
  - This overall objective resulted in the following areas of exploration:
    - Winter and Summer travel activity
    - Customer satisfaction - measure importance and satisfaction of terminal conditions, walk-on and transit services, toll booth interactions, loading and unloading procedures, vessel conditions, vessel crew interactions, on-time arrival and departures and WSF website and telephone services.
    - Fare structures
    - Demographic characteristics of ferry customers – travel patterns, WSF satisfaction and demographic data.
- A total of 1,754 riders completed the 2012 Winter Customer Survey between May 3 and May 15, 2012, yielding a maximum sample variable of ±2.3% at the 95% confidence level.
- A total of 2,890 riders completed the 2012 Summer Customer Survey between September 6, 2012 and September 24, 2012, yielding a maximum sample variable of ±1.8% at the 95% confidence level.

Executive Summary

- The focus for this biennium was to measure the customer satisfaction as per **RCW 47.64.355 Section 2**:

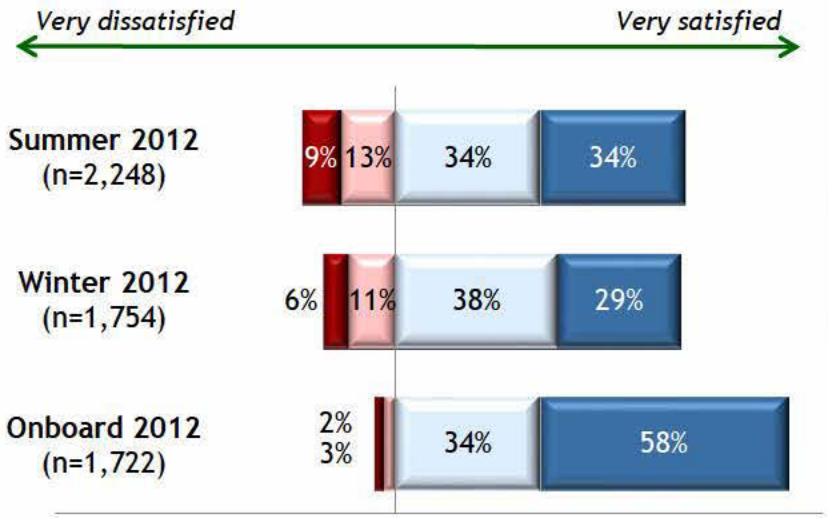
  "*….RCW 47.63.355 (2) which requires the establishment of various types of performance measures and targets for the state ferry system, including service effectiveness measures related to passenger service satisfaction. To this end, the WSTC is directed to evaluate ferry passenger satisfaction as an integrated part of the FROG survey effort*."

- Overall satisfaction with the ferries has not improved since 2008 (Summer 2012 68%; Winter 2012 67%; 2010 72%; 2008 64%). Although satisfaction has remained stable, there are also areas noted for improvement.
- The specific service areas most likely to impact overall satisfaction are as follows (these areas of opportunity are the same for both Summer and Winter 2012):
  - Bathrooms on the ferries should be clean and well maintained
  - Loading procedures should be efficient
  - Vehicles should be processed through ticket lanes efficiently
  - Loading crews should provide clear directions and/or hand signals
  - Vessels should be well maintained (not rusty/dirty) and safe (not cluttered)
  - Loading and unloading for walk-on passengers should be easy
  - Terminals should be clean and well maintained
- These areas are of high importance to riders, but satisfaction with WSF's performance is rated as below average. It will be important for WSF to take action to address areas of poor performance, as well as to inform riders of actions taken.

Overall Satisfaction

- In both the Summer and Winter survey periods, two thirds of riders say they are satisfied with services provided by WSF.
  - While overall satisfaction has fallen slightly compared to 2010, the percentage of those saying they are "very satisfied" has increased, indicating a more polarized customer base.

Overall Satisfaction with WSF



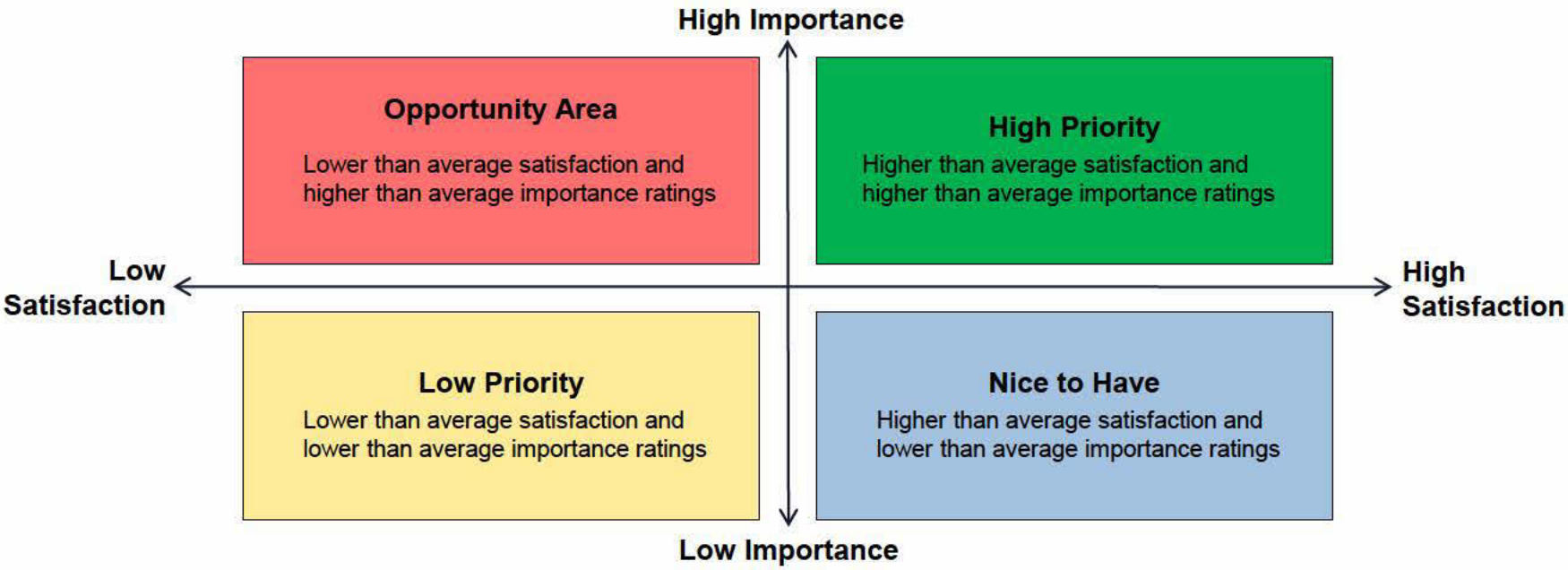
% "Satisfied" 2012	% "Satisfied" 2010
68%	72%
67%	72%

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

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

Ratings by Route & Dissatisfaction

- The following slide presents an overview of the wide array of ferry attribute features studied during both the Winter and Summer surveys. Top-box ratings (4-5 on 5-point scale) are shown for each.
  - In addition, cell shading denotes the quadrant in which each attribute falls based on rated importance vs. satisfaction, and is outlined in the chart below.



Gap Analysis Summary Overview

Quadrant	Code	Attributes	Summer 2012	Winter 2012
High Priority Area Higher than average satisfaction & higher than average importance	19	Vessel crew is friendly, courteous and polite	85%	81%
	20	Vessel crew is helpful, competent and knowledgeable	84%	81%
	14	Unloading procedures are efficient	77%	72%
	15	Unloading crews provide clear directions and/or hand signals	77%	74%
	16	Passenger seating areas are clean and comfortable	77%	74%
	9	Loading procedures are efficient	74%	68%
	6	Passenger loading procedures are efficient	71%	68%
	7	Passenger unloading procedures are efficient	71%	66%
	18	Vessels are well-maintained (not rusty/dirty) and safe (not cluttered)	71%	67%
	5	Easy loading and unloading for walk-on	70%	68%
	12	Efficiently processes vehicles through ticket lanes	70%	65%
Nice to Have Higher than average satisfaction & lower than average importance	13	Unloading crew is friendly, courteous and polite	78%	74%
	10	Loads ferries to capacity with little room between cars	73%	69%
	8	Loading crew is friendly, courteous and polite	71%	65%
Low Priority Area Lower than average satisfaction & lower than average importance	1	Terminals are clean and well-maintained	65%	66%
	2	Terminals are comfortable	51%	54%
	3	Schedule is adequately coordinated with transit services at terminal	42%	40%
	4	Adequate parking near terminals	34%	30%
Opportunity Area Lower than average satisfaction & higher than average importance	17	Bathrooms on the ferries are clean and well-maintained	68%	67%
	11	Loading crews provide clear directions and/or hand signals	67%	61%

Opportunity Area - Clear Loading Directions

- According to 2012 summer period riders, there is room for improvement in providing clear loading directions to drive-on and passenger riders. Seattle (24%) and Mukilteo (19%) are the most commonly reported terminals at which dissatisfaction occurred.

Ratings on a 5-pt Scale *(1=low; 5=high)*		TOTAL n=1821	SEA/ BAIN n=475	SEA/ BREM n=143	EDM/ KIN n=322	FAU/ VAS/ SOU n=226	PTD/ TAH n=55	MUK/ CLI n=324	PTT/ COU n=69	ANA/ SJI/SID n=206
WSF loading crews provide clear directions and/or hand signals	Imp. *(4-5)*	95%	95%	93%	97%	97%	96%	96%	90%	96%
	Sat. *(4-5)*	67%	75%	61%	73%	58%	46%	61%	77%	66%
	Dissat. *(1-2)*	11%	7%	14%	9%	14%	19%	14%	5%	16%

Top Unsatisfactory Terminals *n=209*

Seattle - 24%

Mukilteo - 19%

Clinton/Fauntleroy - 14%

Edmonds - 13%

Anacortes/Bremerton - 10%

Specific Complaints

- **Seattle:** *"A few loaders do not make eye contact and do not give clear signals in advance. This is annoying and dangerous."*
- **Mukilteo:** *"Boat crew needs much better communication with drivers. Often they are too busy talking to each other; very cursory wave - not sure what you meant?!"*
- **Mukilteo/Clinton:** *"Confusing hand signals - some of the crew members use hand signals along with verbal commands. This is much more helpful."*
- **Seattle/Bainbridge:** *"Universally, loading personnel make vague, small hand gestures (or even just a single finger!) to indicate where drivers should go, without using eye contact. They get irritated if you don't use ESP to learn where to go. It would be helpful if all loading personnel learned the SAME hand gestures for loading!"*
- **Port Defiance/Tahlequah/Fauntleroy/Vashon:** *"Hand signals [are] not standard and hands [are] not always clearly visible in marginal lighting conditions."*
- **Coupeville/Pt. Townsend/Mukilteo/Clinton:** *"Hand signals and gestures vary between crew and are often unclear to the uninitiated, so tourists are often confused."*

Opportunity Area - Bathrooms Clean & Maintained

- Much like winter riders, those who used the vessel passenger deck area in the summer months say there is room for improvement in terms of the cleanliness and maintenance of on-boat bathrooms. The Kaleetan and Tacoma (12% each) are the least satisfactory vessels.

Ratings on a 5-pt Scale *(1=low; 5=high)*		TOTAL n=1926	SEA/ BAIN n=520	SEA/ BREM n=193	EDM/ KIN n=331	FAU/ VAS/ SOU n=224	PTD/ TAH n=50	MUK/ CLI n=312	PTT/ COU n=76	ANA/ SJI/SID n=219
The bathrooms on the ferries are clean and well maintained	Imp. *(4-5)*	97%	96%	97%	98%	97%	96%	96%	96%	98%
	Sat. *(4-5)*	68%	66%	49%	71%	75%	84%	68%	87%	67%
	Dissat. *(1-2)*	10%	13%	19%	7%	4%	2%	9%	1%	10%

Top Unsatisfactory Terminals *n=209*

Kaleetan/Tacoma - 12%
Wenatchee/Kitsap - 11%
Puyallup - 10%
Cathlamet - 9%
Walla Walla - 8%

Specific Complaints

Wenatchee/Tacoma: *"You have to hold your breath and step over puddles when visiting the men's room."*

Wenatchee/Tacoma: *"This is due to the poor ventilation in the male restroom on the 520, 620 and 705 BI to Seattle ferries. The smell is horrible and often the paper towels are out."*

Cathlamet/Kittitas: *"The ventilation in the restrooms is atrocious. They always smell like the monkey house at the zoo, and the smell wafts out into the cabin. This is not acceptable."*

Elwha: *"I have had to ask the crew to put toilet paper and seat covers in the women's bathroom. Does anyone check this?"*

Kaleetan/Hyak: *"Bathrooms are not very clean, old fixtures, rusty stalls, some stalls don't lock, sometimes soap is missing and toilets don't flush well."*

Kaleetan/Kitsap/Hyak/Walla Walla: *"Bathrooms are always dirty and smelly. Often the toilet paper and hand towels are empty. Doors have suspicious dried liquid on the insides."*

Kittitas: *"The garbage was overflowing in the women's bathroom. One stall was out of service."*

Customer Satisfaction & Use - WSF Website

- Roughly two in three have used the WSF website. Satisfaction is similar to that measured in the Winter wave.
- Among those dissatisfied, the commonly mentioned reason is a cumbersome and difficult to navigate user interface.

Ratings on a 5-pt Scale *(1=high; 5=low)*		Winter 2012	Summer 2012
Used the WSF Website		73% *n=1284*	76% *n=1584*
WSF website experience	Satisfied (1-2)	85%	83%
	Dissatisfied (4-5)	5%	6%

Specific Complaints

- *"The service bulletins are not updated for unexpected delays often enough."*
- *"Website was rather disorganized - it was hard to determine where to go to get info needed."*
- *"Except for finding schedules, the website is challenging to navigate. I have difficulty finding most things I look for there."*
- *"Used to be much easier to find schedules. Now, not so much. I find that I use the WSF iPhone app because it's so much simpler than the web site."*
- *"Not simple to shortcut to specific route schedules and service status reports. I don't want to browse the whole site."*
- *"For some reason I found it very difficult to find my ferry schedule. The link that seemed obvious, 'ferry schedule', led to other, more general info. The first time that has happened, it was very frustrating."*
- *"The website has good features but is terribly organized. It is a total guessing game to go in and buy a ticket, check/manage multi-rides, etc. Wave2Go is by far the worst - the navigation is confusing and the interface is unprofessional. The mobile site is pretty bad too."*
- *"The information I want is on the website but it is always hard to find. The layout of the site is poor and the links for important things are often a single word in a very small font and hard to find as they are all over the page and not well organized."*

Customer Satisfaction & Use – WSF Telephone Support

- As a percentage, few ferry riders have utilized WSF's telephone support system in 2012. In real numbers, however, use could be as high as 175,000 individual customers a year (8% of 22 million riders). Those that have utilized WSF's telephone support services report mostly positive satisfaction rates. Most of those who are dissatisfied report issues such as long wait times, difficult automated systems or poor/outdated information.

Ratings on a 5-pt Scale *(1=high; 5=low)*		Winter 2012	Summer 2012
Used WSF Telephone Support		8% *n=138*	9% *n=181*
WSF telephone support experience	Satisfied (1-2)	74%	64%
	Dissatisfied (4-5)	18%	21%

Specific Complaints

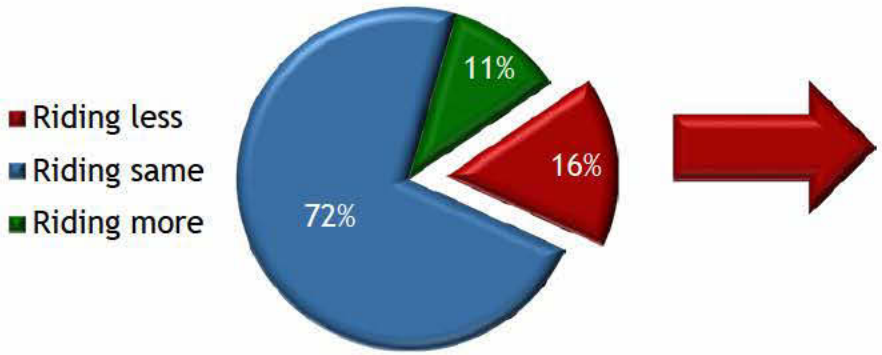
- *"Does not provide actual wait times at ferry docks. You are on hold long periods of time if you need to talk to anyone."*
- *"The voice prompts seem to be longwinded/not efficient"*
- *"Could not get the phone answered."*
- *"Had a hard time getting to a real person."*
- *"I was trying to find information about a vessel that had broken down. The online vessel tracker showed it running along the line. I called to see if it was being put back into service. The person I talked to didn't know what was going on. I knew more than she did."*
- *"Messages were not up to date and really hard to get wait times at multiple terminals."*
- *"Your automated system is about the worst that I have experienced."*
- *"Not interested in hearing my concerns about passenger drop off conditions at the Bainbridge terminal."*

Winter Customer Survey

Change in Ferry Ridership

- Ridership during the Winter period is comparable to one year ago. However, roughly one in five (16%) state they are riding the ferries less, primarily due to life changes that require less travel.

Ridership Compared to a Year Ago
(n=1,754)

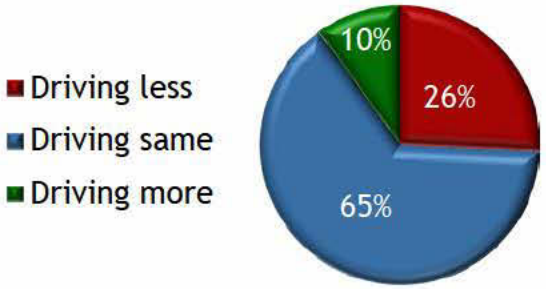


Top Reasons for Less Ridership	n=287
Less need to travel due to life circumstances	**24%**
Expensive/raising rates	15%
Changed jobs to a location that doesn't require as much ferry travel	14%
Started telecommuting/telecommute more	11%
Retired	11%
Moved to a location that doesn't require as much ferry travel	11%
Unemployed/employed part-time	10%

Q4 Compared to one year ago (Winter January-March 2011), would you say you personally…
Q5 Why do you ride the ferries less now?

Expected Change in Ferry Ridership

Driving Habits Compared to a Year Ago
(n=1,691)



- Compared to a year ago, one in four riders say they are driving onto the ferries less often, while just 10% say they do so more often.
- Expected ferry ridership is expected to remain relatively stable, with only 13% stating they plan to be riding the ferries less, primarily due to a move.
  - As with current ridership decline, expensive/rising ferry costs is the second most common reason for a drop in expected future use.

Expected Ridership in Next 2 Years
(n=1,754)

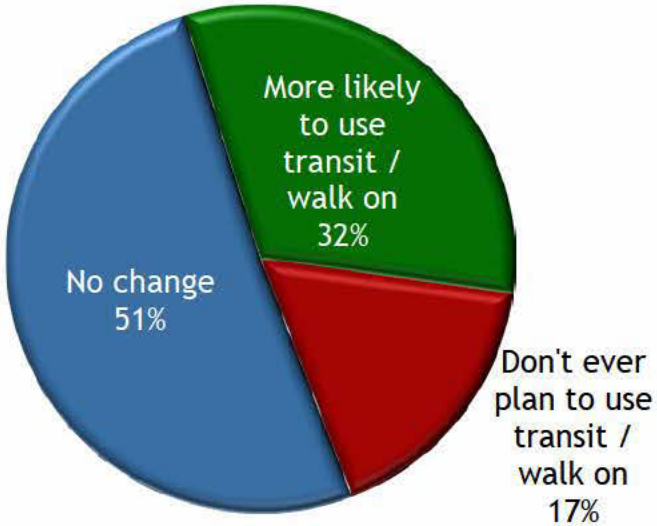
Top Reasons for Lower Expected Ridership	n=220
Plan to move to a location that doesn't require as much ferry travel	23%
Expensive/raising rates	20%
Less need to travel due to life circumstances	14%
Plan to retire	13%
Plan to telecommute/will telecommute more	12%
Plan to change jobs to a location that doesn't require as much ferry travel	8%

Q6 Looking forward 2 years, how would you guess your ferry ridership will change, if at all?
Q7 What is the main reason you anticipate you will ride the ferries less in the next 2 years?
Q9 Thinking for a moment about your overall driving habits this last year on ALL ROADS AND HIGHWAYS, would you say you are…

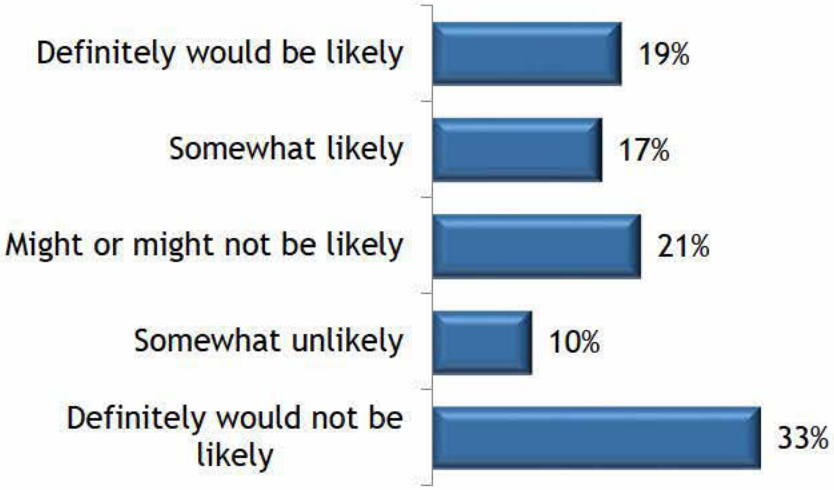
Combined Transit Tickets & Fare Discounts

- Half say a combined ferry & transit fare discount via the ORCA Card would have no change on their use of public transportation; one third would be more likely to use transit and walk on.
- One third would be at least somewhat more likely to walk on if they received a 30% discount on a combined ferry/bus ticket.

Impact of Combined Fare Discount
(n=1,754)



Impact of 30% Ferry/Bus Discount
Among Those Driving On
(n=1,465)



Q60 Would you be more likely to use transit and walk onto the ferry if you got a discount on both your ferry fare and transit pass when used in combination via the ORCA Card?

Q61 How likely would you be to walk onto the ferry instead of driving on, if you received a 30% discount on a ferry/bus combined ticket?

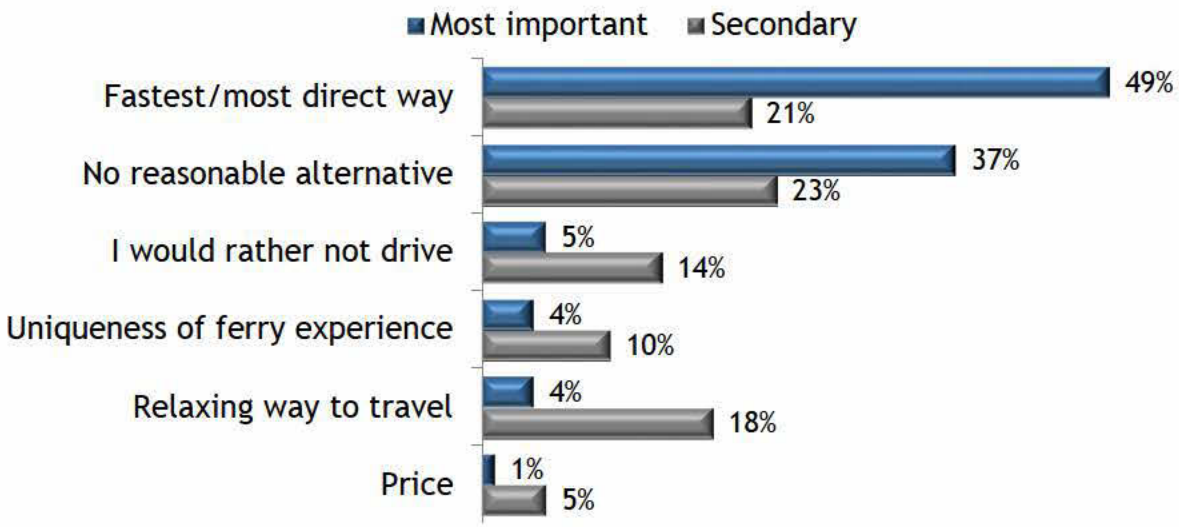
Summer Customer Survey

Factors Driving Ferry Decision

- Riders are most likely to utilize WSF for recreational/social trips because it is the fastest and most direct way to their destination.
  - On a secondary level, riders enjoy the ferry experience, saying it is a relaxing way to travel or they would rather not drive.

Factors Determining Ferry Travel

Among FROG Panel Respondents
(n=2,136)



	Most Imp. Onboard 2012 n=1,707	Most Imp. Factor 2010
Fastest/most direct way	35%	45%
No reasonable alternative	26%	41%
I would rather not drive	8%	6%
Uniqueness of ferry experience	16%	3%
Relaxing way to travel	7%	4%
Price	7%	1%

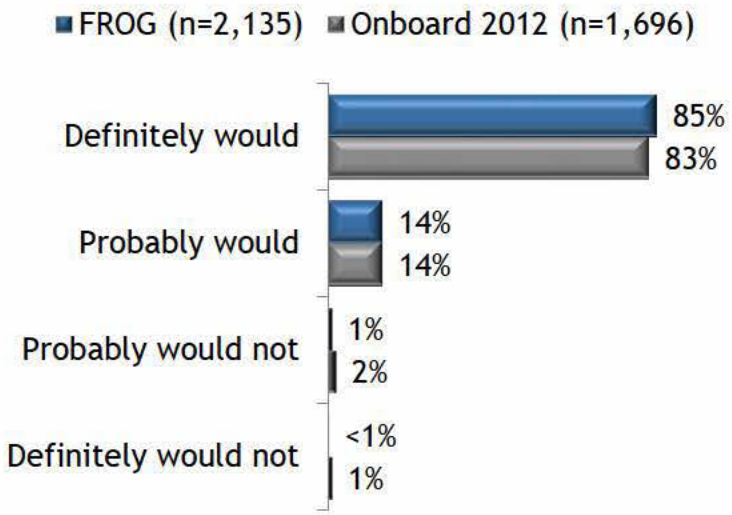
Q15A Which of the following reasons best describes why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?

Q15B. Which other reasons describe why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?

Future Recreational/Social Use

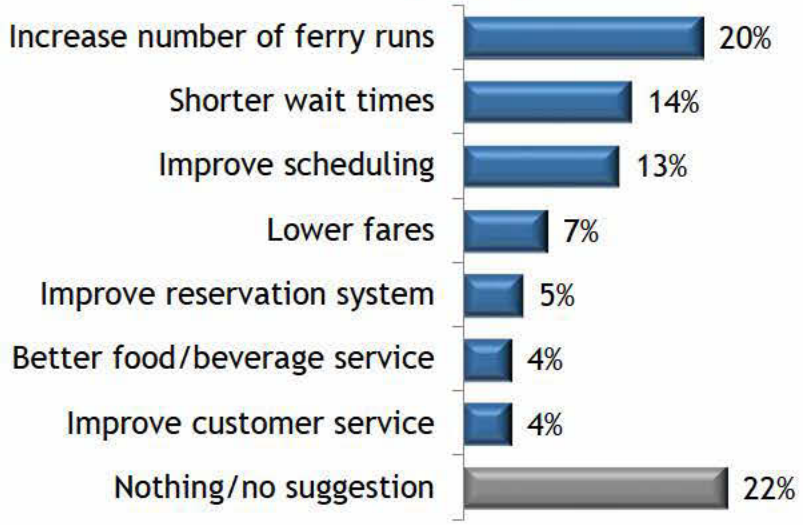
- Nearly all recreational/social riders say they "definitely would" be likely to consider using WSF again for other recreational/social trips.
- When asked what changes could influence more recreational/social trips using WSF, riders mention an increase in the number of runs, shorter ferry wait times and improved scheduling.

Future WSF Use



Influencing More Recreational Use

Among FROG Panel Respondents (n=1,585)

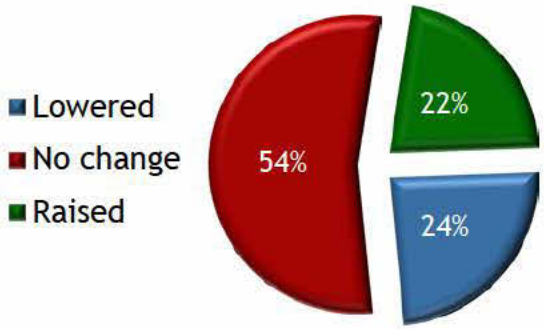


*Q16 How likely would you be to consider using Washington State Ferries again for a **recreational or social** trip? Would you say you...*
Q18 Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social trips that people, like you, make in a year?

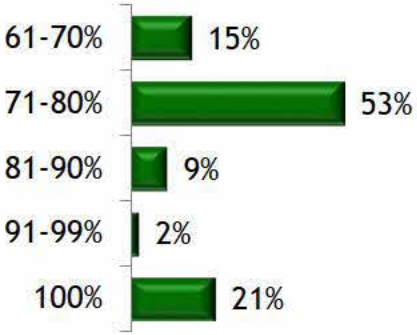
Fare Coverage of Operating Expenses

- Half of FROG panel respondents believe the current fare coverage structure is adequate and should not be changed, in which fares account for 65% of the ferries' operating costs.
  - Of those that believe this rate should be increased, half say a coverage rate of 71-80% is preferred.
  - Of those that say the rate should be lowered, half agree a coverage rate between 41-50% is acceptable.

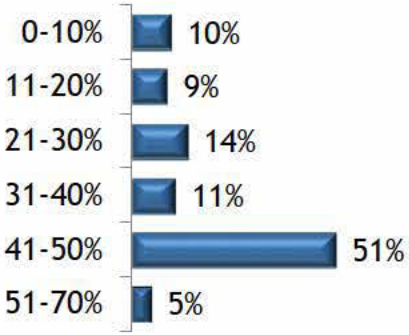
Rider-Paid Operating %
(n=2,888)



Increasing Rider-Paid %
(n=627)



Decreasing Rider-Paid %
(n=703)



Q73 Currently, fares pay for 65% of the cost of operating the ferries. Given the state budget, this means money for road maintenance and constructions must be used to keep the ferries operating. Should the rider paid percent of 65% be raised, lowered or stay the same?

Q73A/B What percent should it be [raised/lowered] to?

Thank you!

Questions?

Contact:
Reema Griffith, Executive Director
360-705-7070