Washington State Transportation Commission

2014 WSF Summer Performance, Recreational & Policy Study

FROG Survey

Executive Summary Presentation

Washington State Transportation Commission

EMC RESEARCH MARKET & OPINION RESEARCH SERVICES

Preface

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

The FROG research initiative in 2014 consists of the following main phases:

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

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

Methodology:

A total of three thousand twenty eight (n=3,028) FROG members completed the Summer 2014 survey (conducted between 9/21 and 10/16) yielding a maximum sample variable of +/- 1.8% at the 95% confidence level.

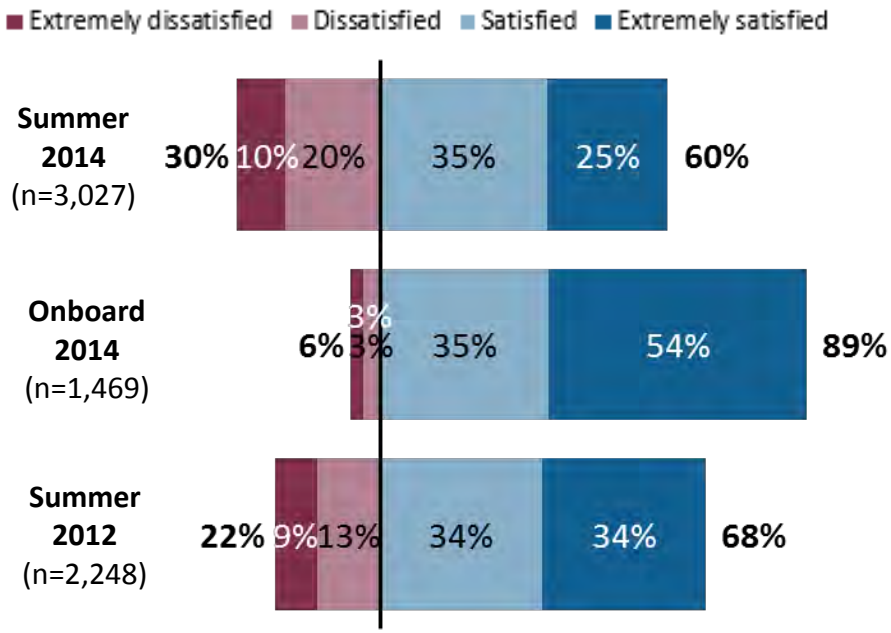
A total of one thousand four hundred and sixty-nine (n=1,469) ferry riders (non-FROG members) completed the Summer 2014 on-board survey between 6/30 and 7/28 yielding a max sample variable of +/- 2.5% at the 95% confidence level.

EMC Project/Document #: 14-5091

Overall Satisfaction

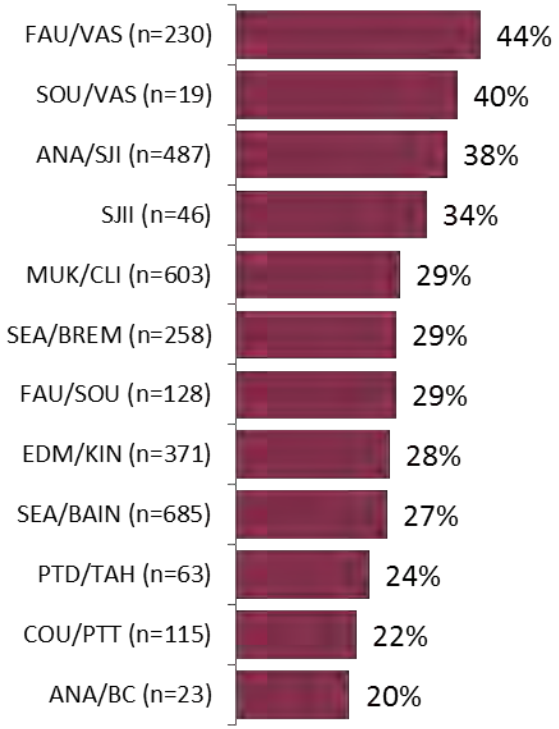
The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has fallen overall compared to 2012 (60% vs. 68%). Onboard survey respondents are more satisfied by a 29 point margin. The Fauntleroy/Vashon route , Southworth/Vashon , Anacortes/San Juan, and Interisland routes all have higher dissatisfaction rates then the overall. The greatest shift from 2012 by route has been among Fauntleroy/Vashon and Fauntleroy/Southworth.

Overall Summer 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 represents the corresponding total dis/satisfaction*

Overall Summer Dissatisfaction by Route (Total Dissatisfied)



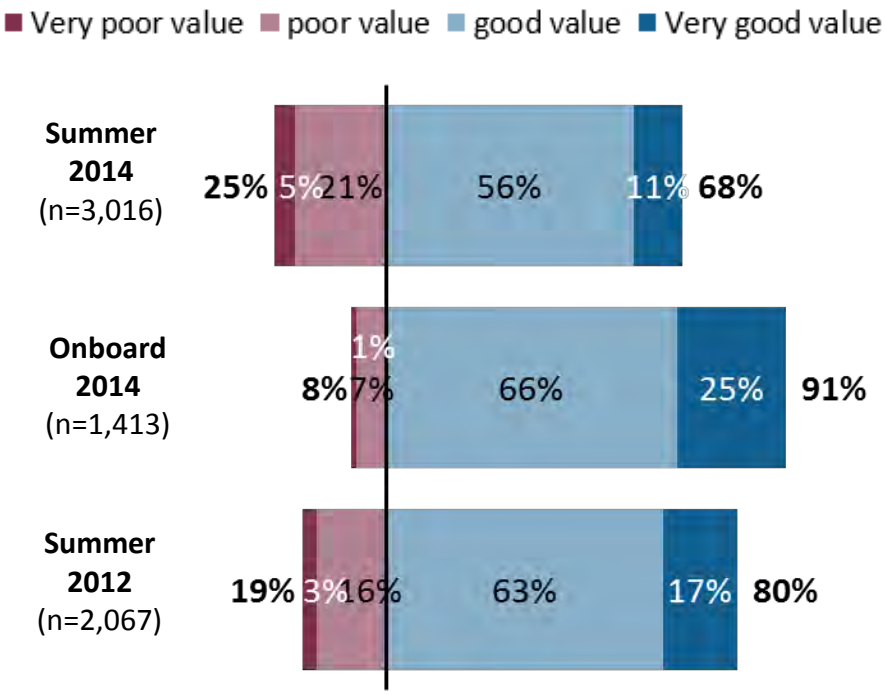
2012	Shift
21%	**+23%**
52%	**-12%**
34%	+4%
36%	-2%
29%	0%
20%	+9%
15%	**+14%**
22%	+6%
19%	+8%
17%	+7%
20%	+2%
11%	+9%

Q20. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer period, June 15th through September 20th. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period?

Overall Value

The percentage of riders saying WSF is a "good" or "very good" value in the summer period has decreased significantly compared to 2012 (68% vs. 80%). Overall good value is down from summer 2012 across all routes with most significant decrease among riders using the Fauntleroy/Vashon route.

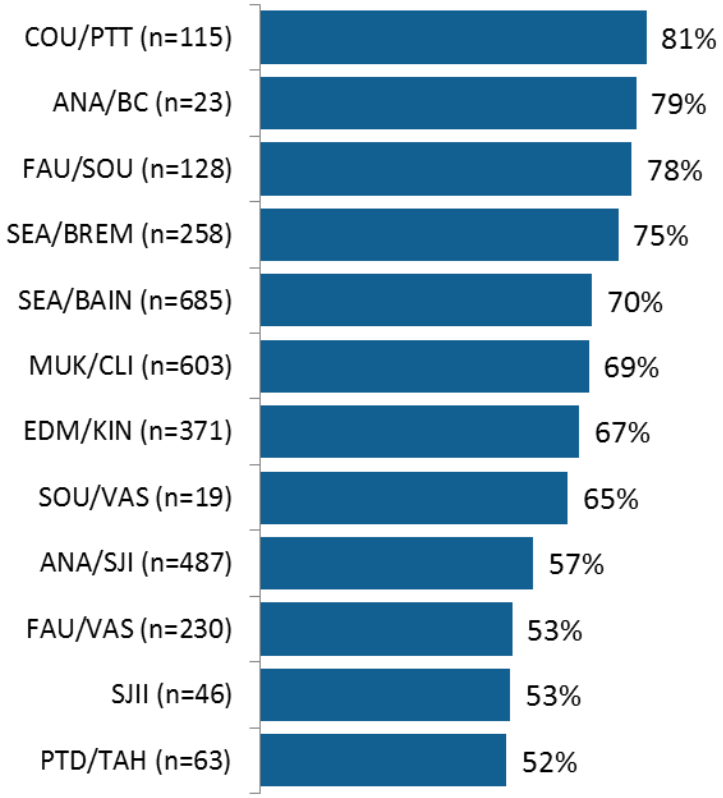
Overall Perceived Value of WSF



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

Overall 'Good Value' by Route

(Very good + good value)



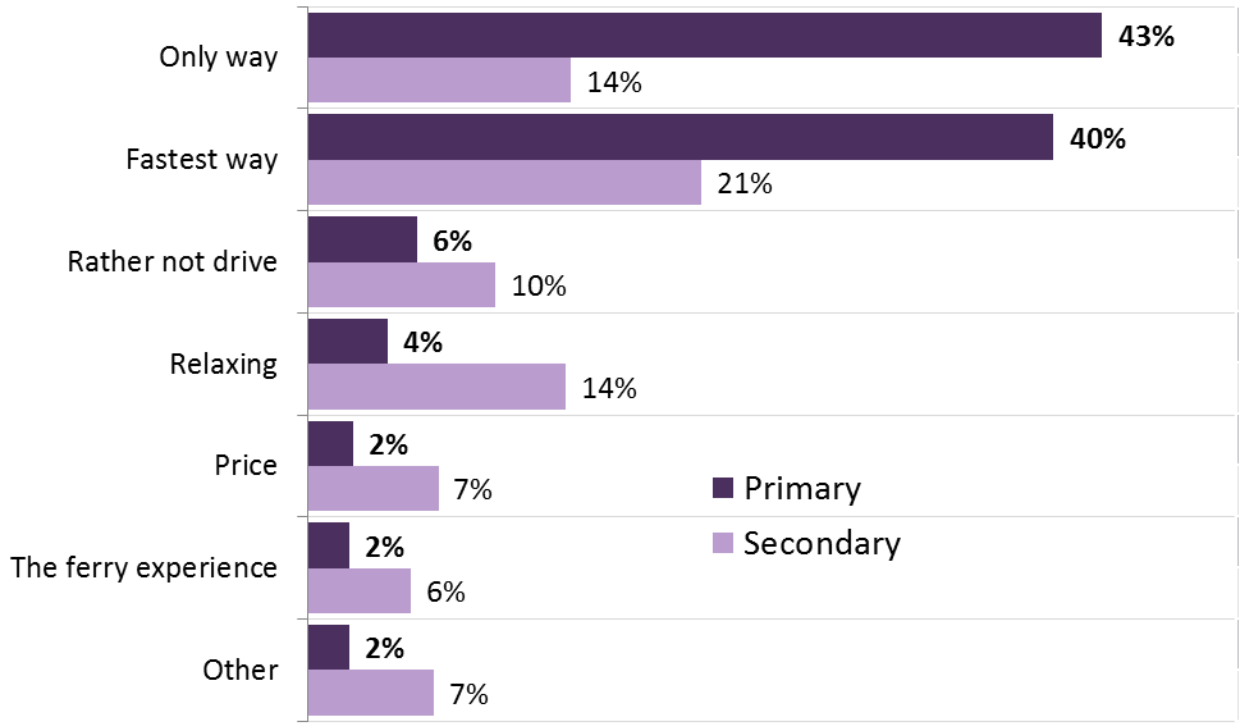
2012	Shift
81%	0%
82%	-3%
81%	-3%
76%	-1%
78%	-8%
72%	-3%
79%	**-12%**
73%	-8%
66%	**-9%**
69%	**-16%**
60%	-7%
52%	0%

Q26. For the Summer period (June 15th through September 20th), do you feel that Washington State Ferries is...

Factors Driving Ferry Decision

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

Factors determining ferry travel
Among FROG panel respondents
n=2,785



	Onboard n=1,409	2012 n=1,707
Only way	**26%**	**37%**
		23%
Fastest way	**27%**	**49%**
		21%
Rather not drive	**9%**	**5%**
		14%
Relaxing	**9%**	**4%**
		18%
Price	**7%**	**1%**
		5%
The ferry experience	**21%**	**4%**
		10%
Other	**1%**	--
		--

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

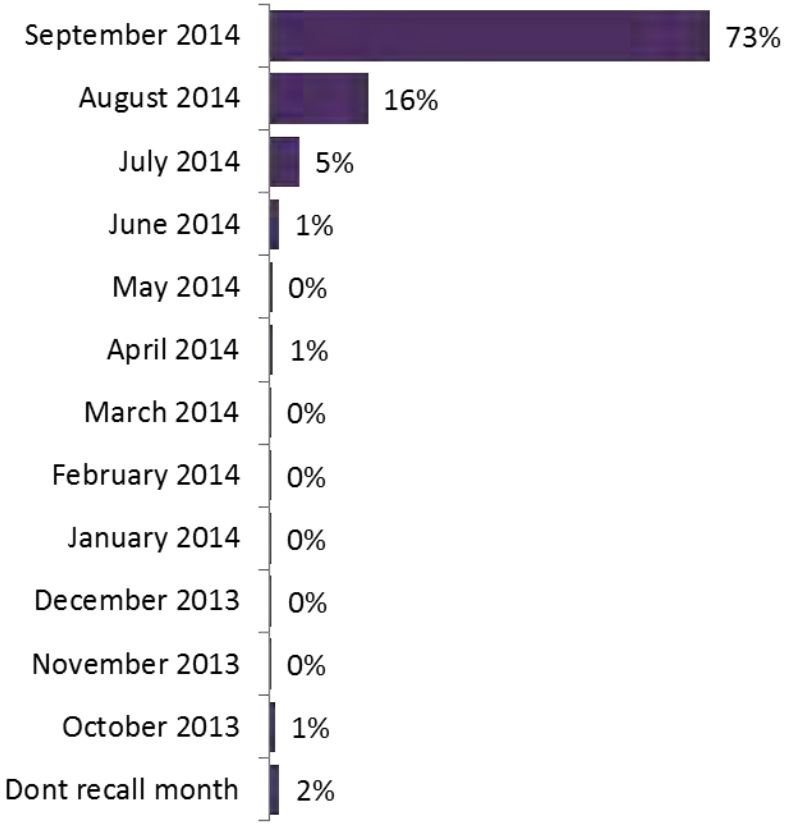
Recreation

Last Recreational/Social Trip

September and August are the months with the greatest amount of recreational trips. Seattle/Bainbridge is the route most used, followed by Edmonds/Kingston and Mukilteo/Clinton.

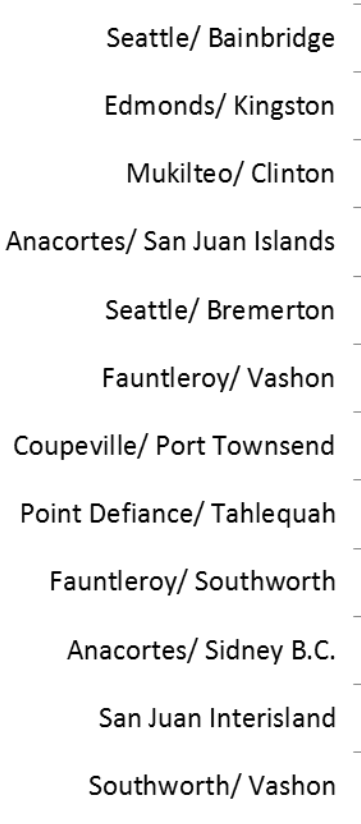
Month of last Recreational/Social Trip

n=2,924



Route of last Recreational/Social Trip

n=2,783



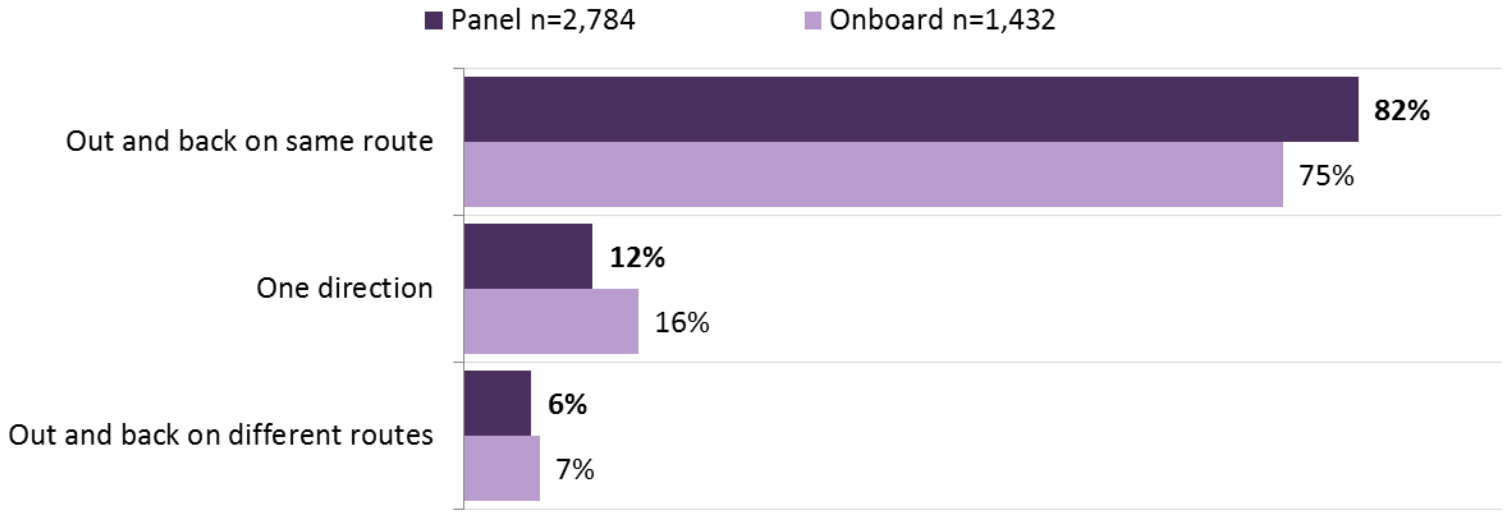
	2012	Shift
Seattle/ Bainbridge	27%	-1%
Edmonds/ Kingston	17%	0%
Mukilteo/ Clinton	16%	0%
Anacortes/ San Juan Islands	10%	**+1%**
Seattle/ Bremerton	8%	**+1%**
Fauntleroy/ Vashon	7%	0%
Coupeville/ Port Townsend	5%	**+1%**
Point Defiance/ Tahlequah	3%	0%
Fauntleroy/ Southworth	3%	0%
Anacortes/ Sidney B.C.	1%	0%
San Juan Interisland	1%	0%
Southworth/ Vashon	1%	0%

Q2. In which month did you take your most recent recreational or social trip that used WSF
Q3. What was the route that you rode for your most recent recreational or social trip

Crossings and Trip Duration

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

Number of Crossings on Most Recent Trip



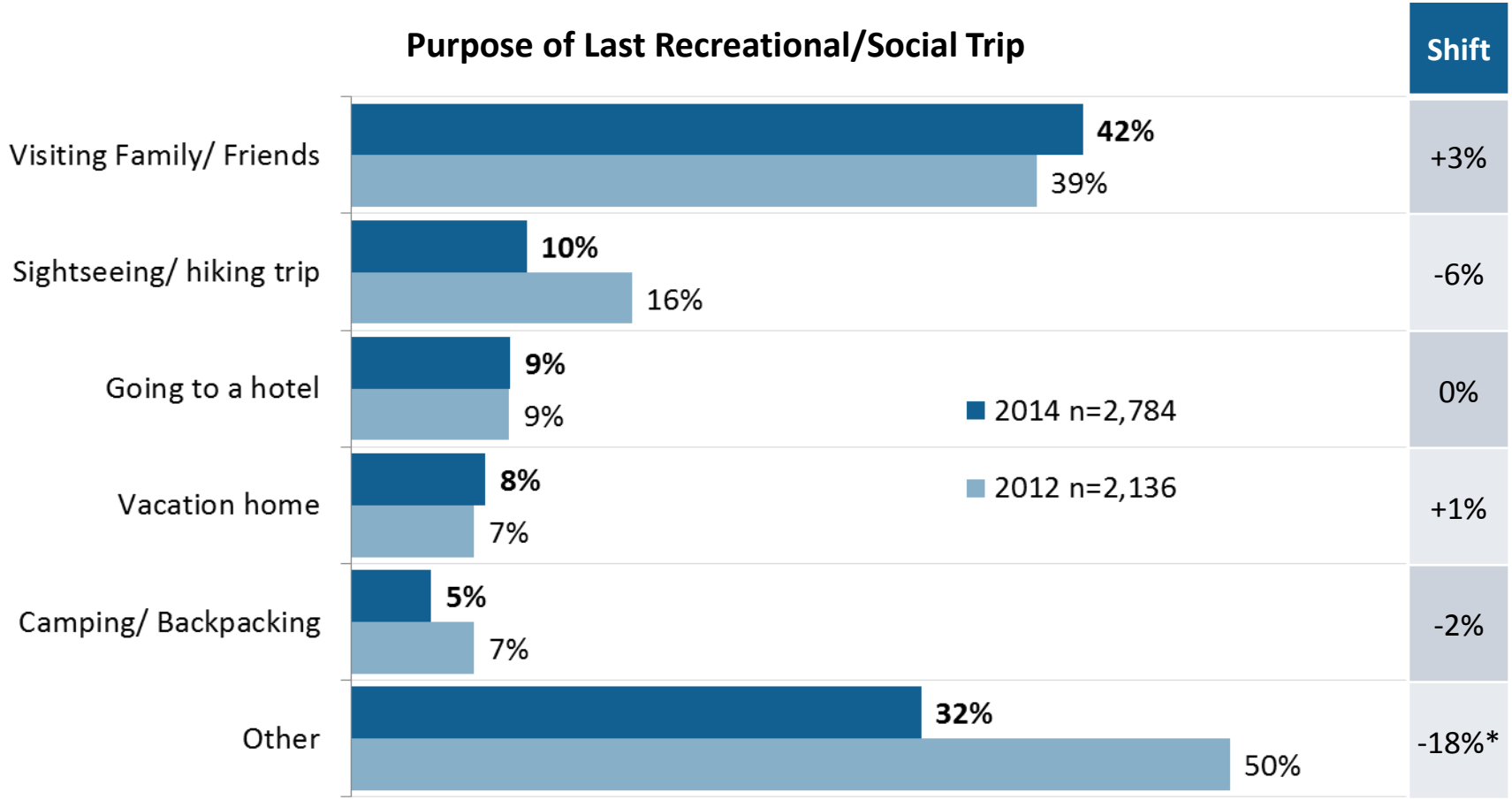
2012 n=2,134	Shift
80%	**+2%**
76%	-1%
12%	**0%**
17%	-1%
7%	**-1%**
6%	+1%

Trip Duration		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
	Respondents	2753	633	213	56	343	216	107	18	110	548	446	41	22
2014	Mean number of days	**2**	2	1	2	2	2	1	2	3	2	4	2	5
2012	Mean number of days	**1**	1	1	1	1	1	1	1	3	1	3	1	4

Q11. How many crossings or sailings on Washington State Ferries (WSF) did you take
Q10. What was the duration (# of days from when you left home to when you returned home) of the trip

Recreational/Social Trip Purpose

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

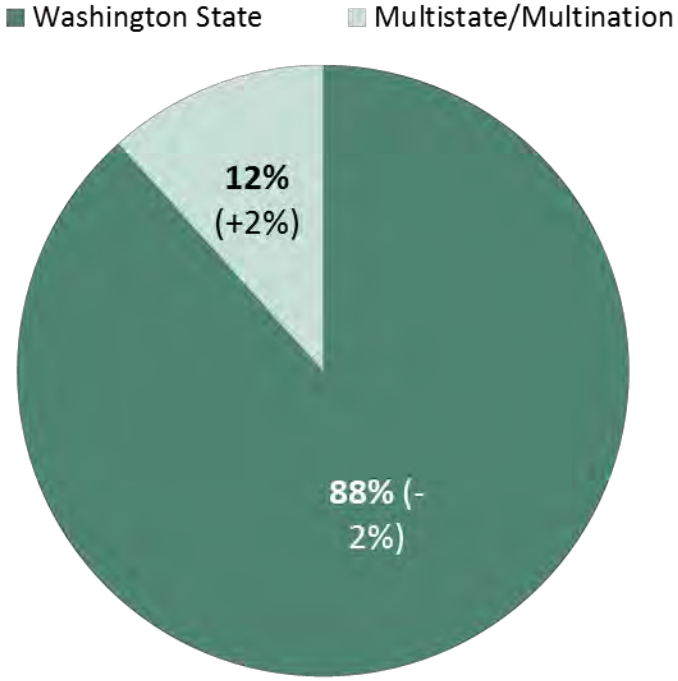


Q12. Which of the following best describes your most recent recreational or social trip
**2012 has 4 more categories, which have been collapsed into 'other', amounting to an increase of 16%.*

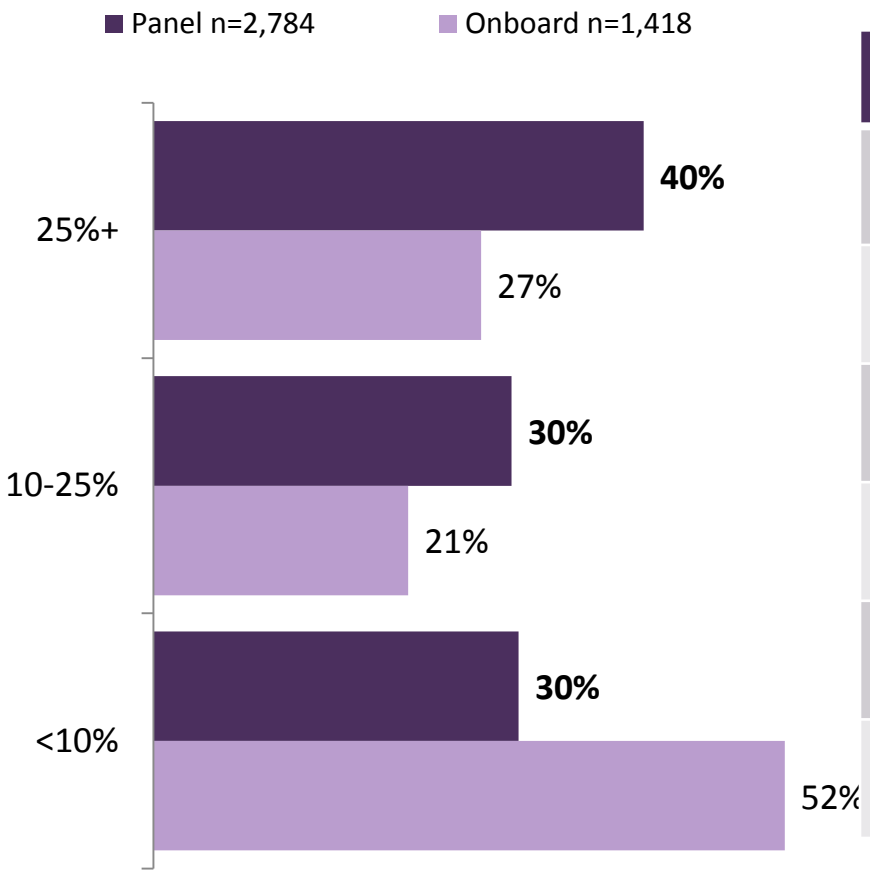
Destination & Relative Ferry Cost

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

Destination of Last Recreational/Social Trip
n=2,783



Relative Cost of Last Recreational/Social Trip



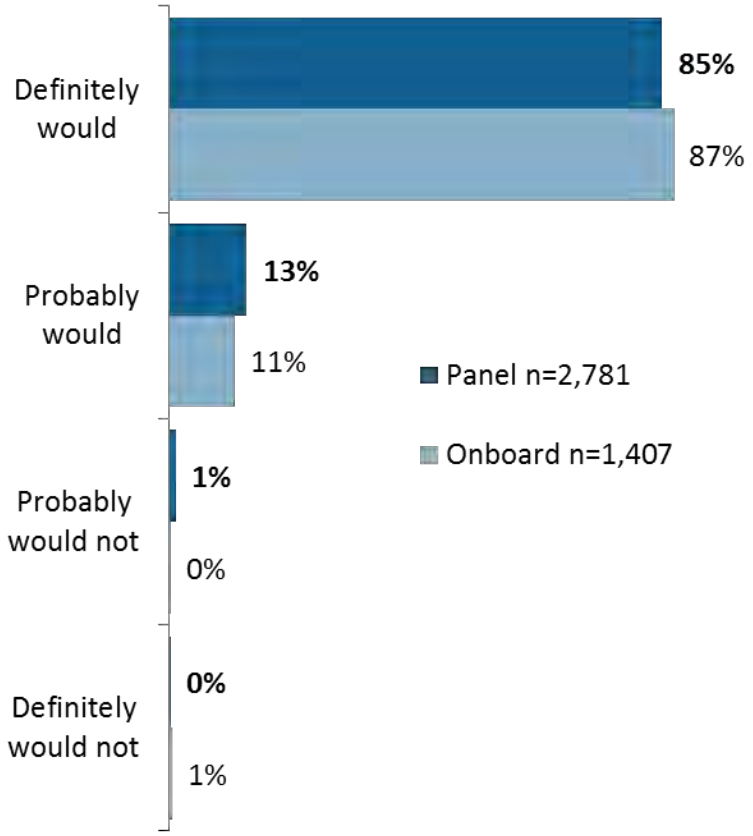
2012 n=2,127	Shift
40%	**0%**
33%	-6%
27%	**+3%**
22%	-1%
33%	**-3%**
45%	+7%

Q13. Was your most recent recreational or social trip part of a...
Q14. How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent trip?

Future Recreational/Social Use

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

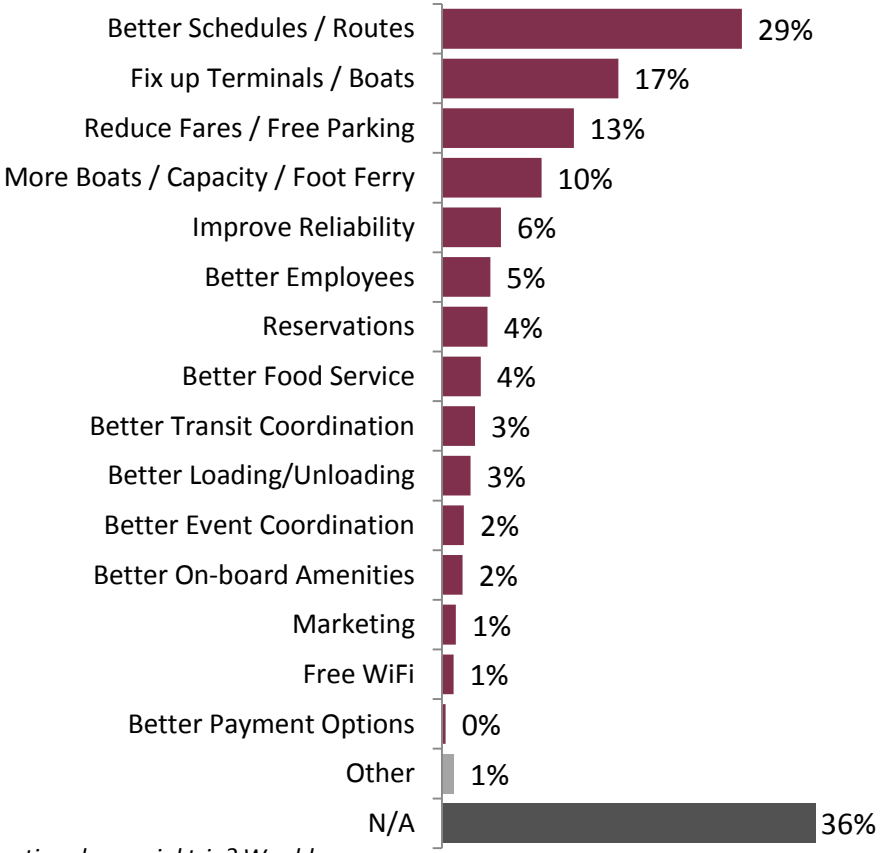
Future WSF Use



2012 n=2,135	Shift
85%	0%
83%	+4%
14%	-1%
14%	-3%
1%	0%
2%	-2%
1%	-1%
1%	0%

Influencing More Recreational Use

FROG Panel n=2,189

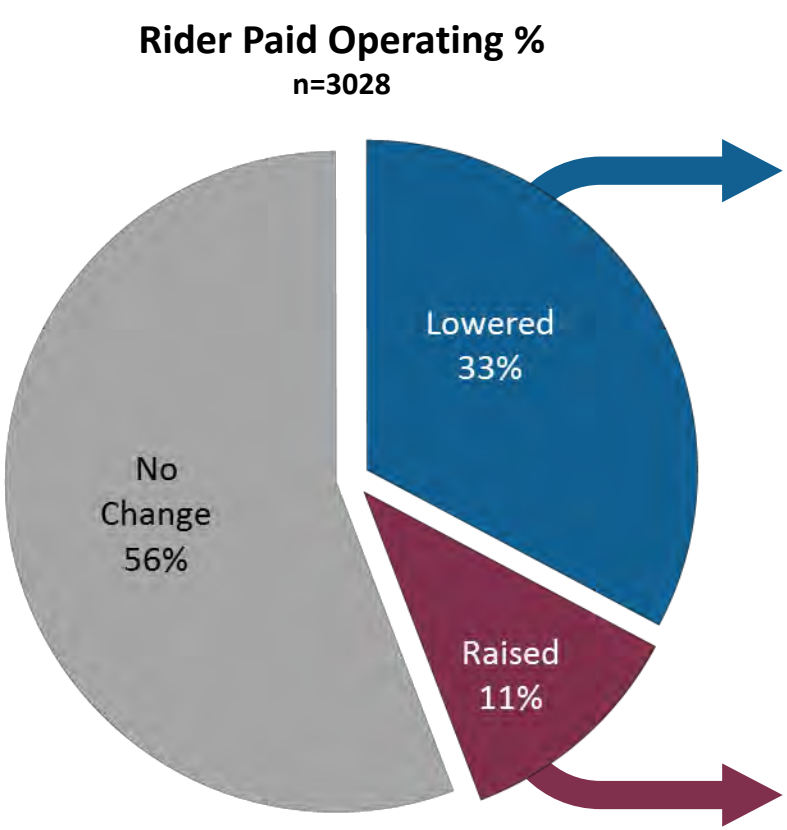


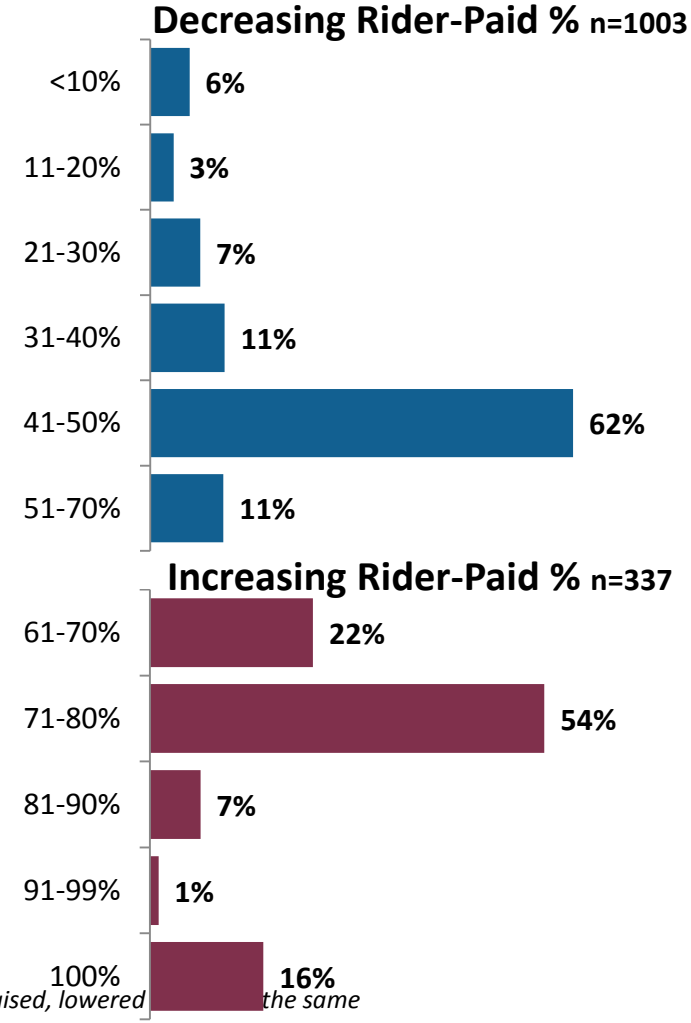
Q16. How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...
Q18. Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips that people, like you,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

Funding

Fare Coverage of Operating Expenses

The majority say the 65% that is the rider paid percentage of daily operating costs should remain the same. One third say they should be lowered and only one-in-ten saying it should be raised.

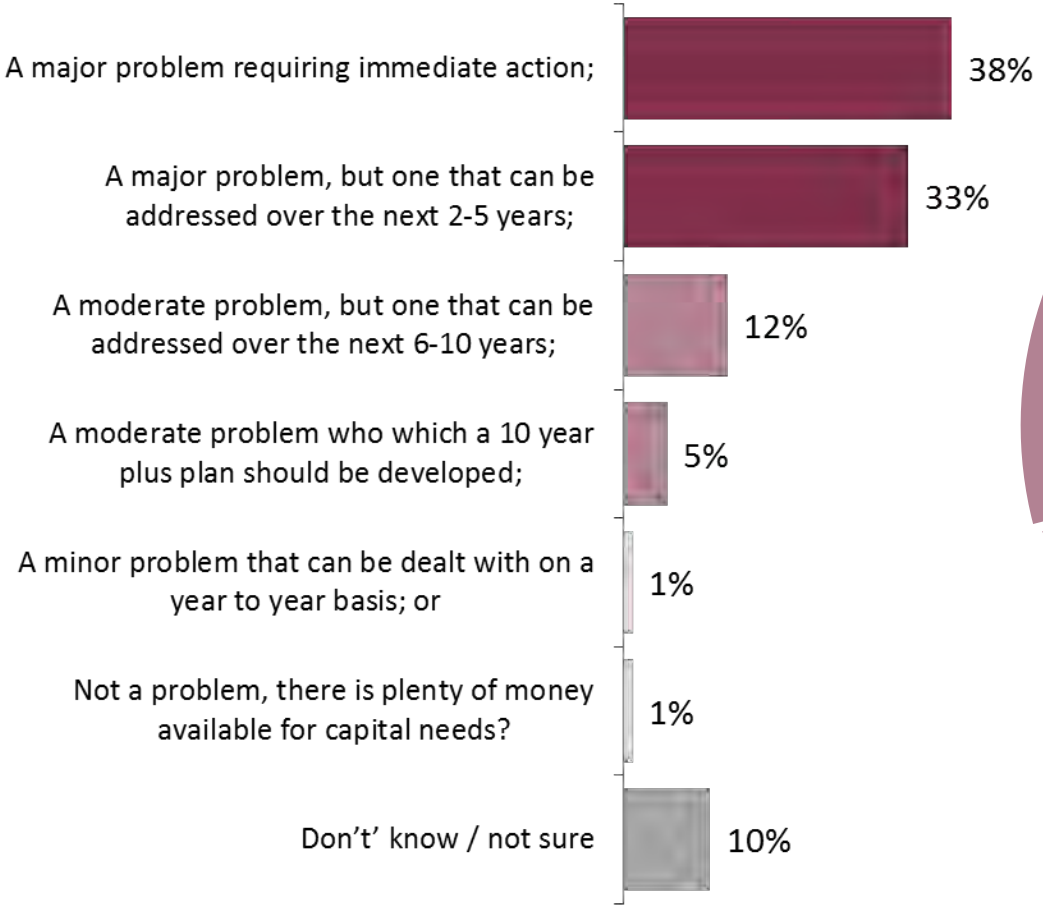


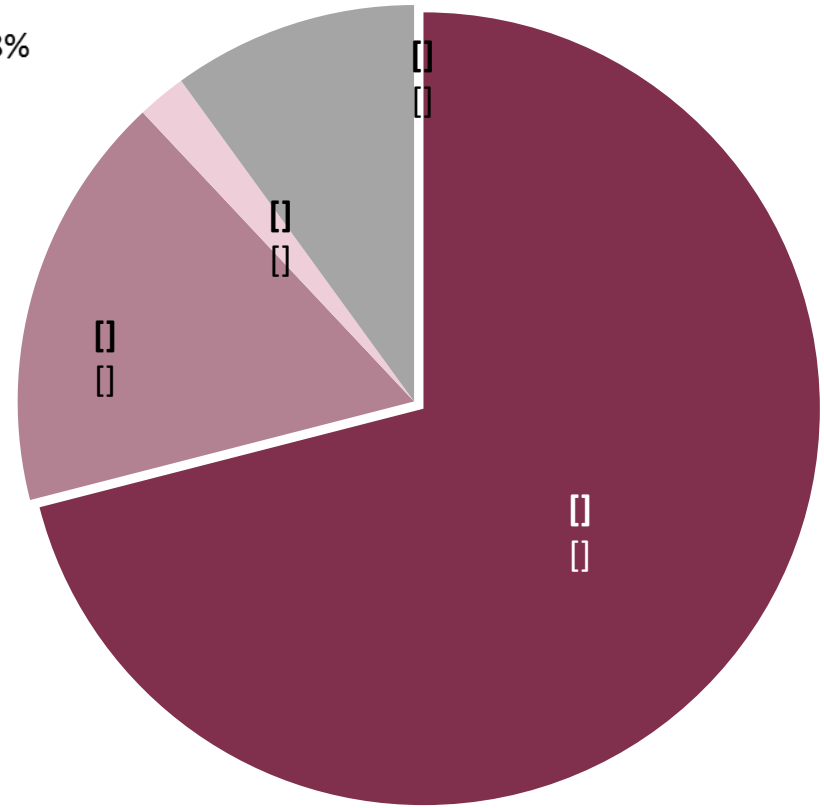


Q73. Should the 65% that is the rider paid percentage of the daily operating costs be raised, lowered the same
Q73a/b. What percent should it be raised/lowered to?

Capital Funding for WSF

71% of respondents say funding for WSF capital needs is a major problem, with over a thirds (38%) saying the need requires immediate action.

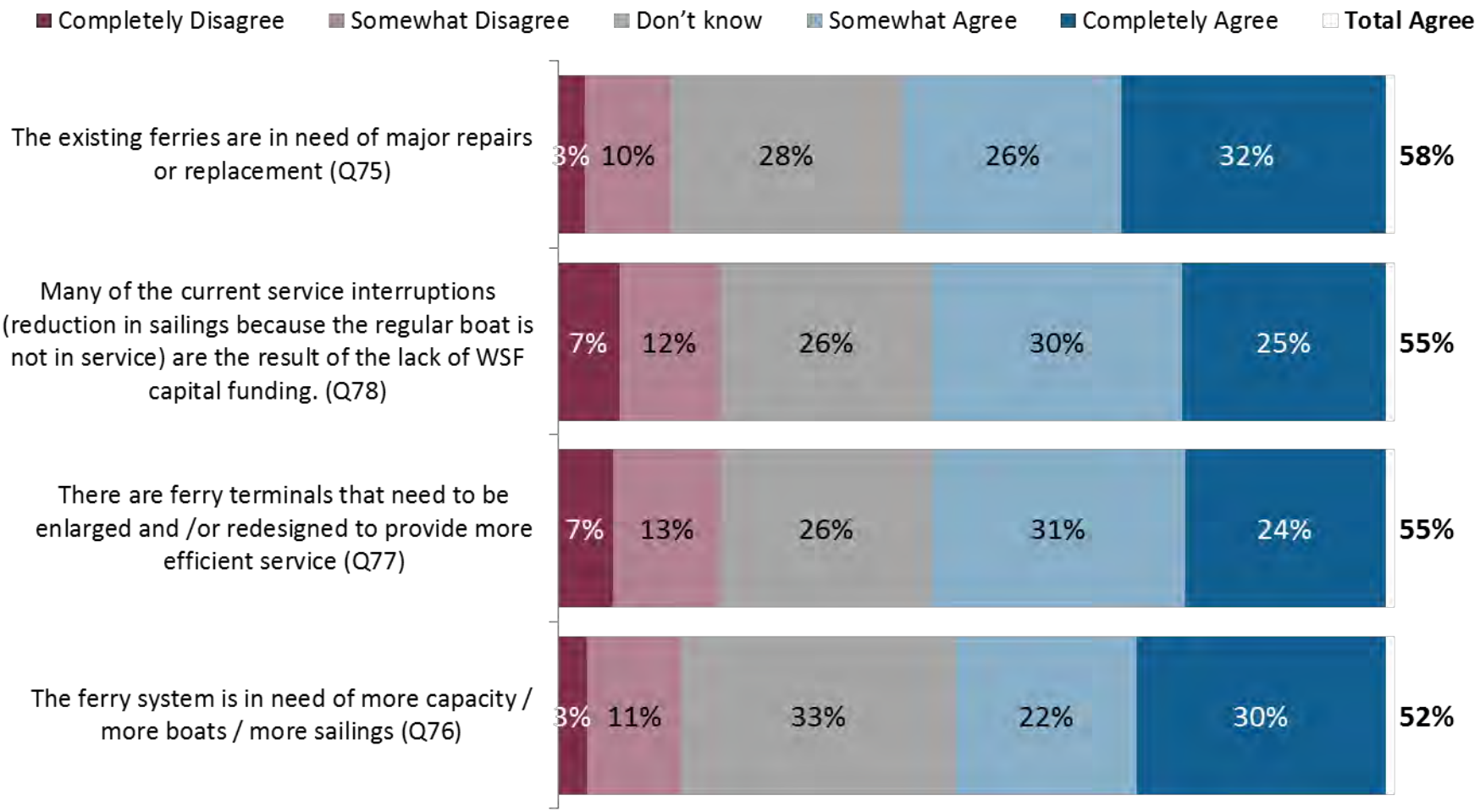




Q74. Since capital funding isn't covered by ferry fares, how big a problem, if any, do you think funding for WSF capital needs are? Would you say the WSF capital funding problem is … (n=3028)

Agreement Statements

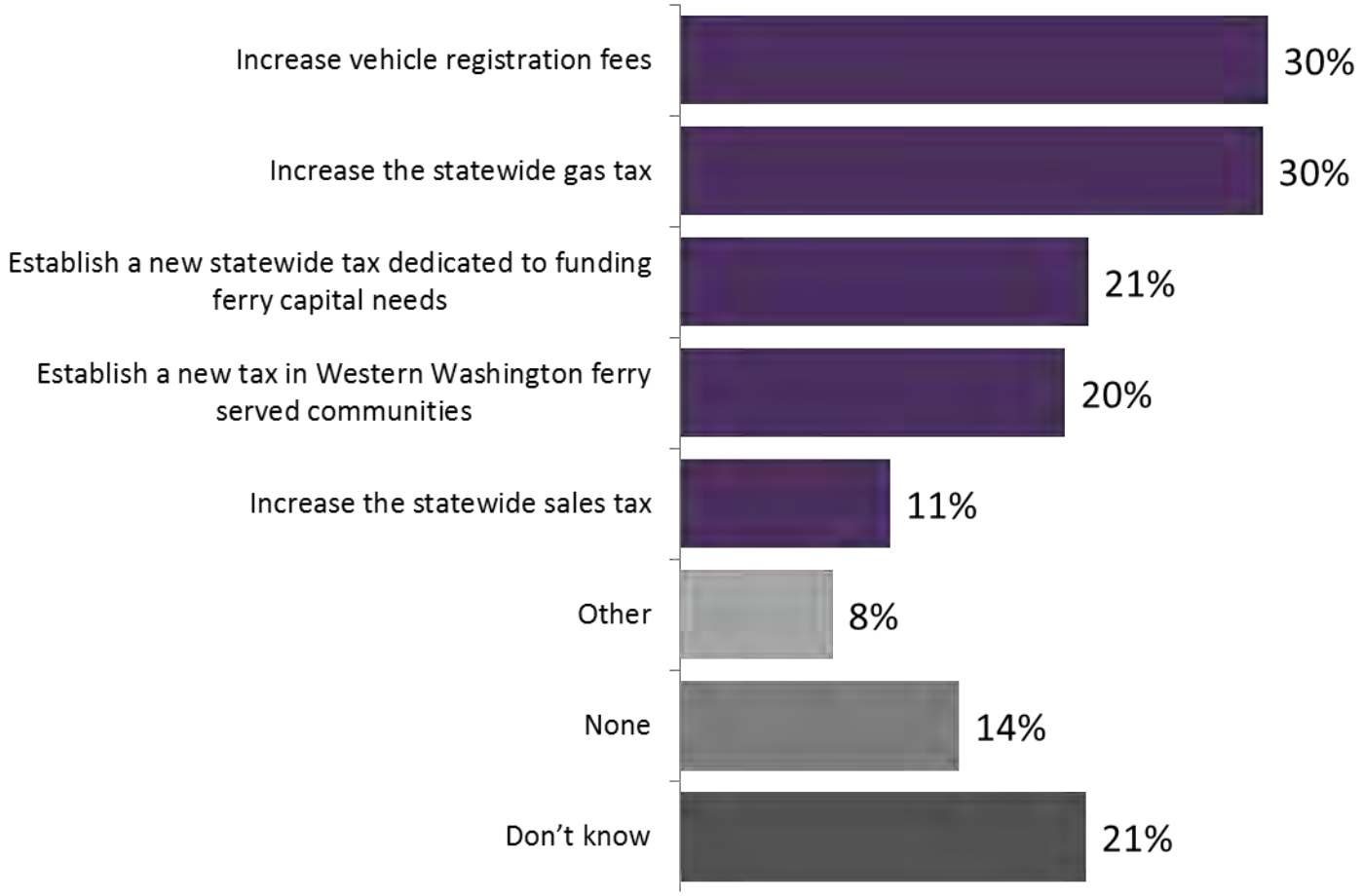
The majority of respondents agree with statements around funding needs for capital and maintenance issues. Few respondents disagree, however a quarter to a third of respondents say they don't know.



Q75-Q78. How much do you agree or disagree with each of the following statements? (n=3028)

Suggested Funding Methods

Increasing vehicle registration along with increasing the statewide gas tax were the methods of funding capital needs most recommended by respondents.



Q79. Which of the following funding methods, if any, would you recommend be used to fund the capital needs of the ferries? Please check as many as you like to see used (n=3028)

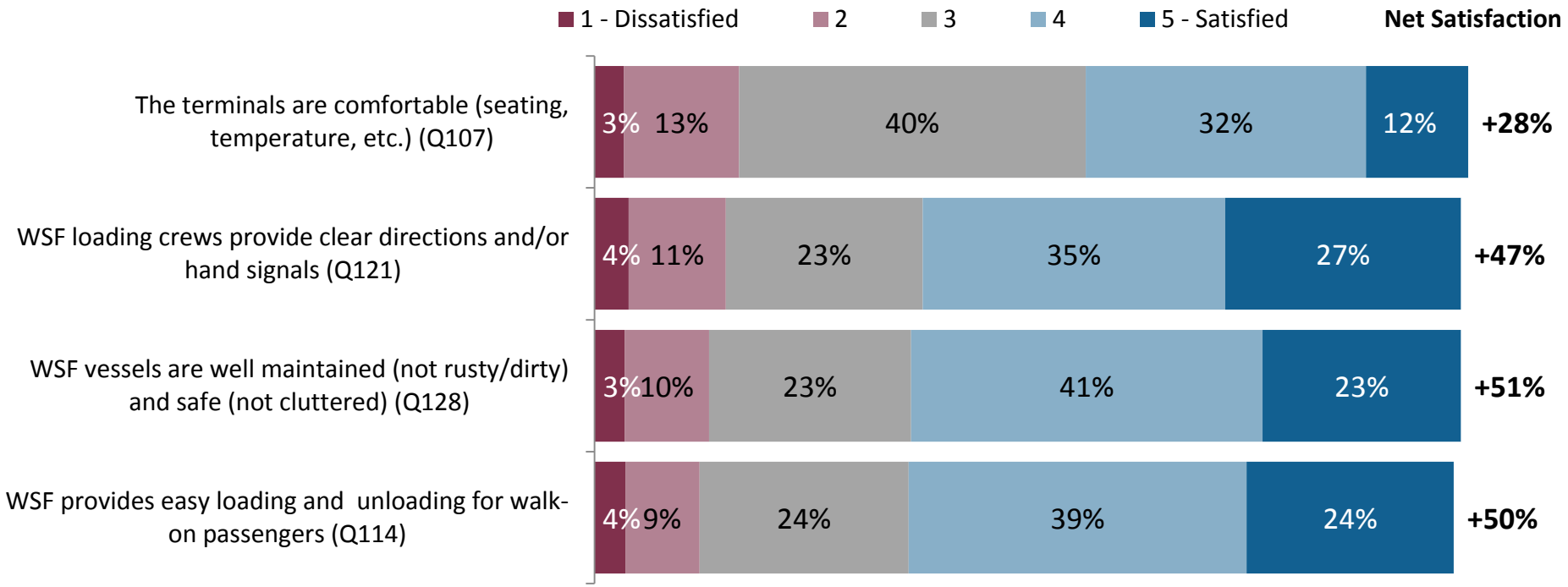
Ferry Attributes

Satisfaction by Attribute - Tracking

Satisfaction across all four attributes remains positive. Total dissatisfaction has only slightly increased since 2012.

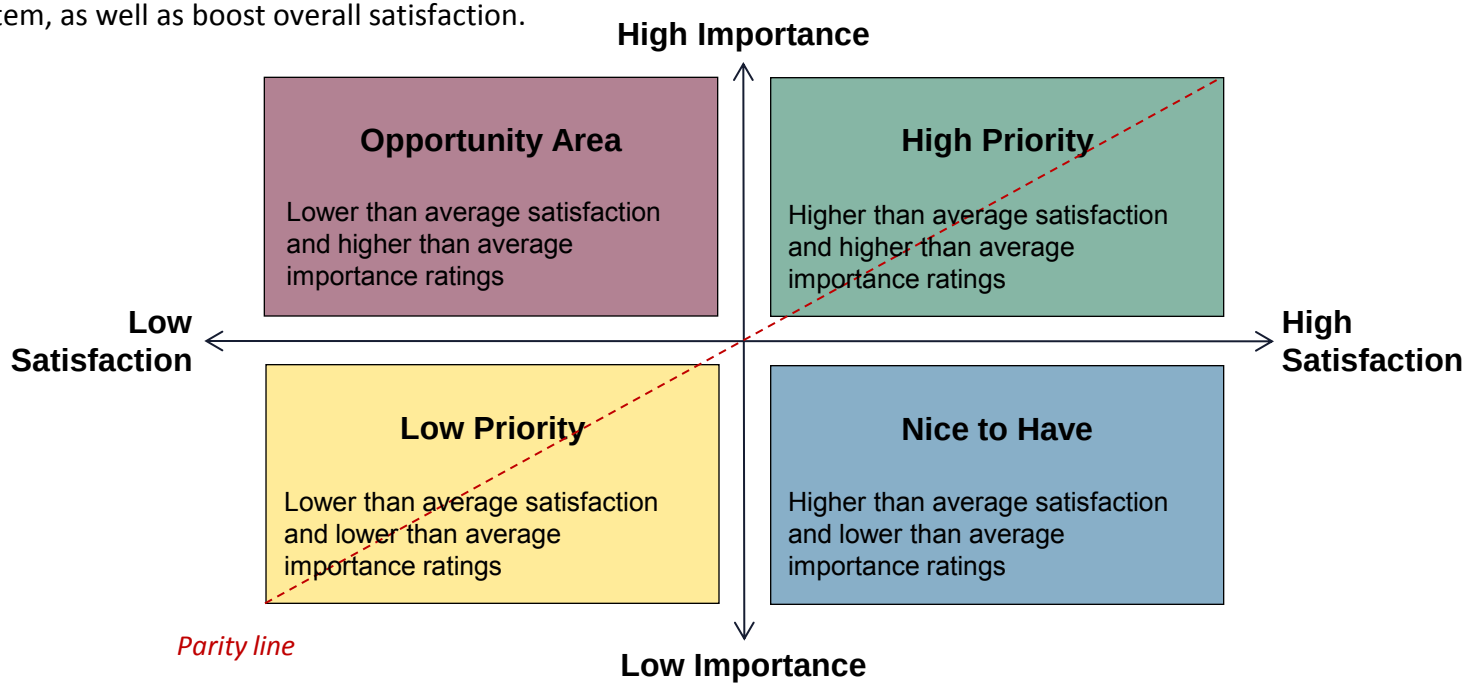
- The following table present an overview of the following slides containing the quad chart analysis
- The following table shows the total dissatisfaction (1-2) of each individual attribute, relative to the 2012 dissatisfaction.
  - The **Shift** is 2014 dissatisfaction minus 2012 dissatisfaction

Attributes	Summer Total Dissatisfaction		
	2014	2012	Shift
Terminals are comfortable	16%	15%	**+2%**
WSF provides easy loading and unloading for walk-ons	13%	11%	**+1%**
WSF loading crews provide clear directions and/or hand signals	15%	11%	**+4%**
WSF Vessels are well maintained and safe	13%	9%	**+4%**



Gap Analysis

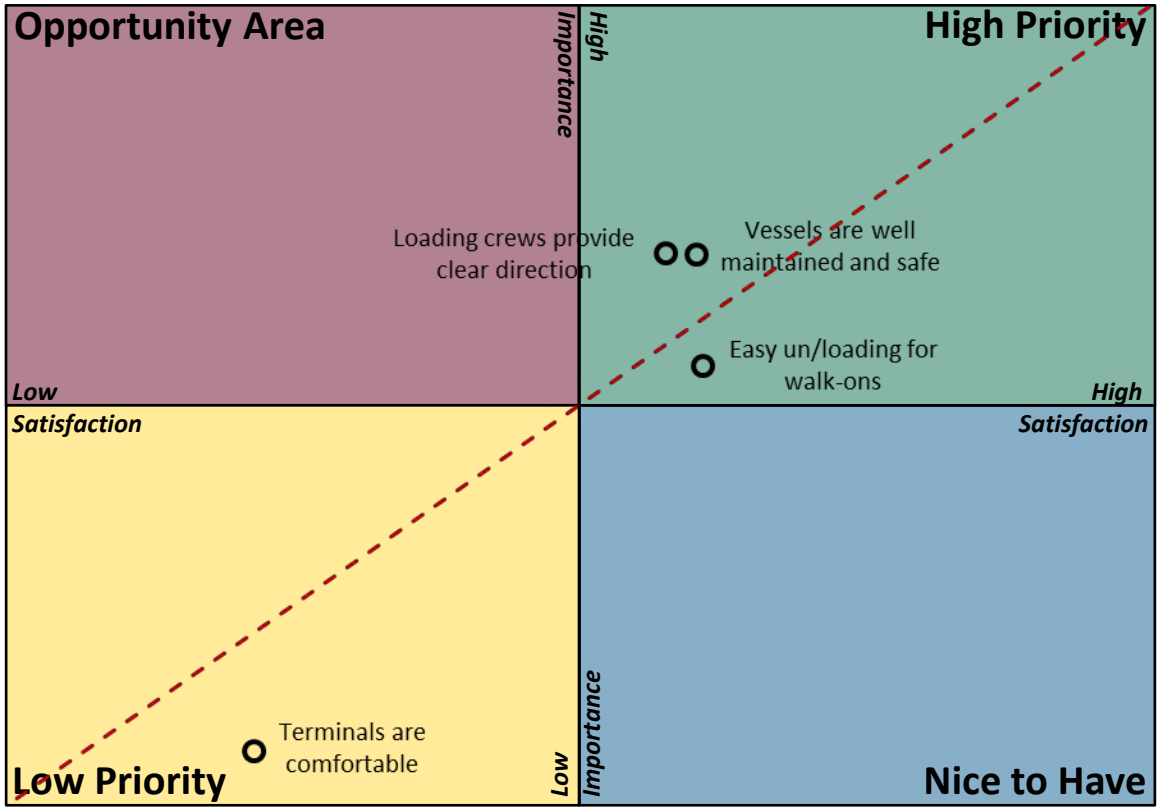
- The following slides present quadrant charts outlining the *relative importance* of each ferry attribute and the *relative satisfaction* of each attribute.
  - The two sample sizes shown on each chart represent the maximum and minimum number of riders rating any given attribute, due to embedded skip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



Gap Analysis: Overall

While there are no opportunity areas overall, Loading crews providing clear directions, and vessels are well maintained and safe are the two highest priority attributes

Satisfaction vs. Importance Ratings ***(n=1986 - 2895)***



Terminals are comfortable

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

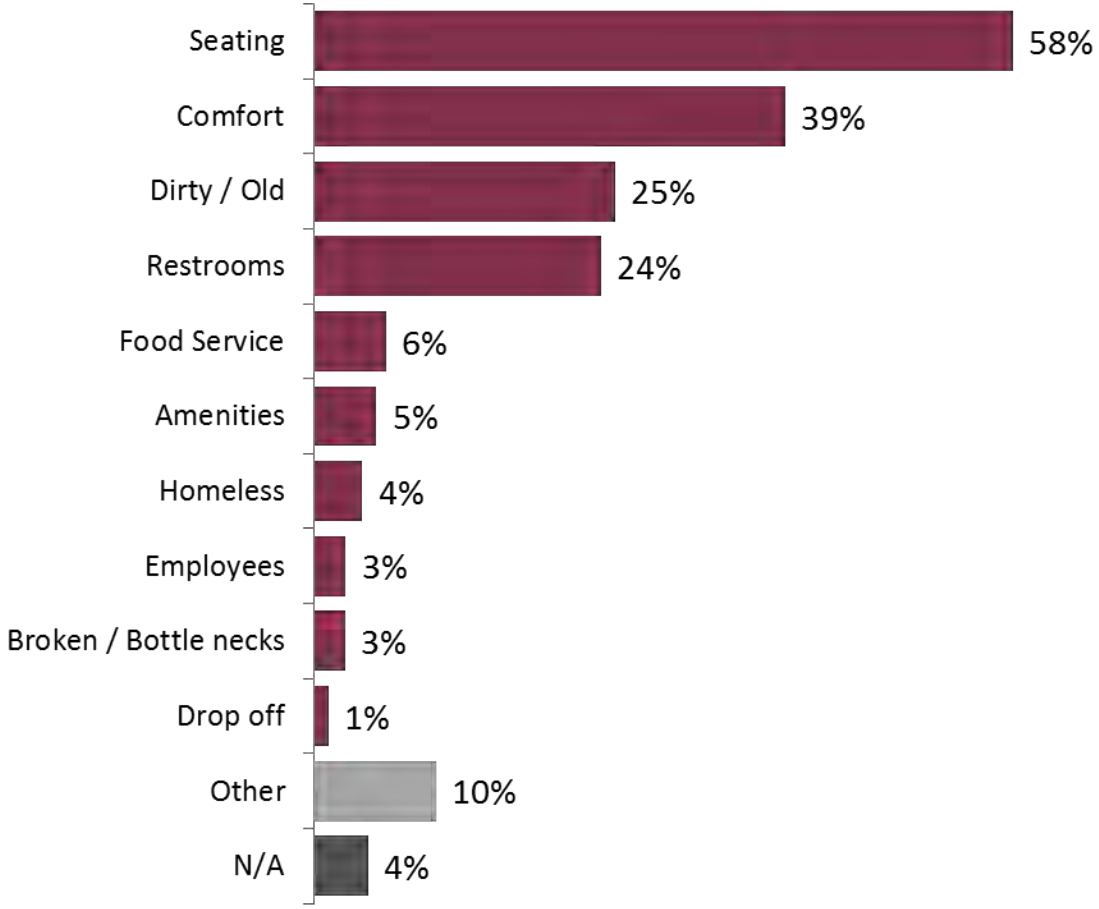
Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2213	589	214	35	235	176	93	16	86	386	330	33	20
Terminals are comfortable (2014)	**Imp.** (4-5)	**61%**	71%	72%	61%	55%	49%	55%	62%	55%	58%	52%	69%	44%
	Sat. (4-5)	**44%**	33%	50%	64%	50%	47%	45%	60%	59%	58%	32%	42%	25%
	Dissat. (1-2)	**17%**	23%	18%	3%	13%	11%	14%	0%	10%	10%	26%	27%	3%
2012	**Dissat.** (1-2)	**15%**	22%	13%	7%	9%	15%	--	--	2%	11%	22%	--	--

Top 3 Unsatisfactory Terminals	
Seattle	54%
Bainbridge	33%
Anacortes	17%

Example of Verbatim Complaints
Seattle - Chairs/seats are uncomfortable, need upgrading
Seattle - Homeless people often wander in and beg for money, no outlets for charging phones/laptops, tables are small and have limited seating.
Seattle - Seats not comfortable for waiting
Seattle - restrooms in very poor condition, otherwise reasonably good.
Bainbridge - was undergoing construction, basically it was chaos. No AC, restrooms were a pit, no place to sit, the whole thing was bad.
Bainbridge - under construction
Bainbridge - Poor lighting. No great seating. Have to stand in the cold breezeway
Anacortes - It doesn't seem that the terminals have been updated in decades, or if they have they haven't taken customer comfort into much consideration... airports are much nicer these days, why not the ferry terminals?

Terminal Issues Mentioned

Seating is the top complaint among people who are dissatisfied.



Q42b. What specific conditions (about the terminal) made you dissatisfied (n=359)

WSF provides easy loading and unloading for walk-ons

Dissatisfaction is highest for Seattle Bainbridge and Mukilteo Clinton

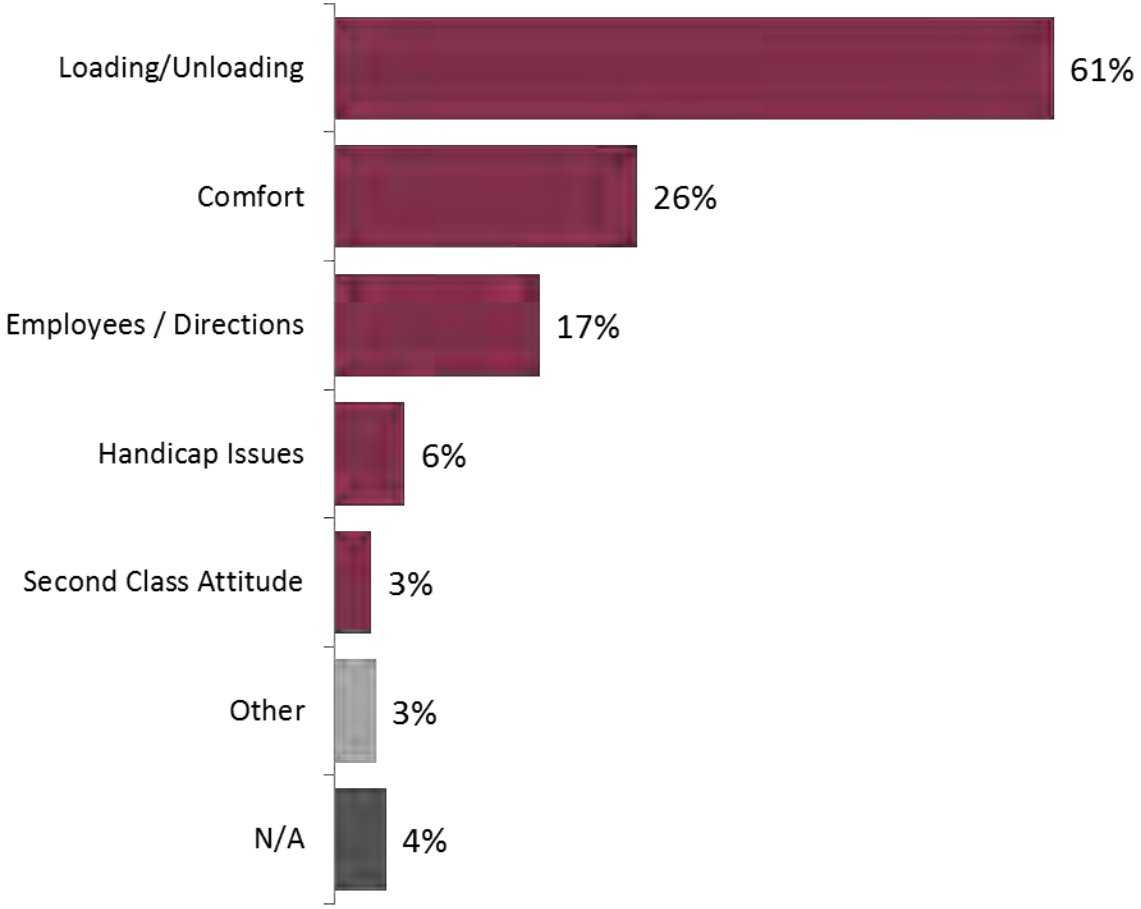
Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		1986	576	208	40	228	150	66	13	60	371	230	34	10
WSF provides easy loading and unloading for walk-ons (2014)	**Imp.** (4-5)	**85%**	90%	87%	83%	82%	84%	89%	93%	82%	81%	81%	87%	91%
	Sat. (4-5)	**64%**	57%	64%	78%	72%	69%	70%	73%	72%	62%	62%	75%	81%
	Dissat. (1-2)	**12%**	16%	14%	5%	5%	8%	8%	9%	5%	15%	10%	12%	5%
2012	**Dissat.** (1-2)	**11%**	15%	5%	0%	6%	12%	--	--	3%	14%	11%	--	--

Top 3 Unsatisfactory Terminals	
Seattle	45%
Bainbridge	33%
Mukilteo	18%

Example of Verbatim Complaints
Seattle - Especially during the summer, there are numerous vacationers who are oblivious to the fact that the ferry is also a commuter route. They fail to move all the way to the front where the turnstiles are, so the crowd extends well back into the terminal.
Seattle - Inefficient loading and unloading of walk-ons. Last to get off-loaded after bikes, motorbikes and about half the cars. Ramp is too small for volume of passengers. Too slow to connect and too narrow for crowds.
Seattle - terminal has too little room for waiting passengers. too crowded.
Bainbridge - The walkway is too narrow and long and does not allow for efficient boarding and unloading.
Bainbridge - The exit ramp is very narrow and not many people can exit the ferry at one time. This makes it difficult to catch the early 90 buses to Poulsbo unless you stand near the walk-on exit for a good part of the ferry ride.
Bainbridge - Longest configuration possible make it a very long walk
Mukilteo - too small, too crowded, only 2 ticket turnstiles, no protection from weather,
Mukilteo - When I walk on with a dog I have to stay down on the car deck where it is cold and windy

Walk on Issues Mentioned

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



Q46c. What specific (walk on) conditions made you dissatisfied (n=238)

WSF loading crews provide clear directions / hand signals

Dissatisfaction with WSF loading crews provide clear directions is highest in Port Townsend, Fauntleroy/Vashon, Anacortes/SJI and Interisland.

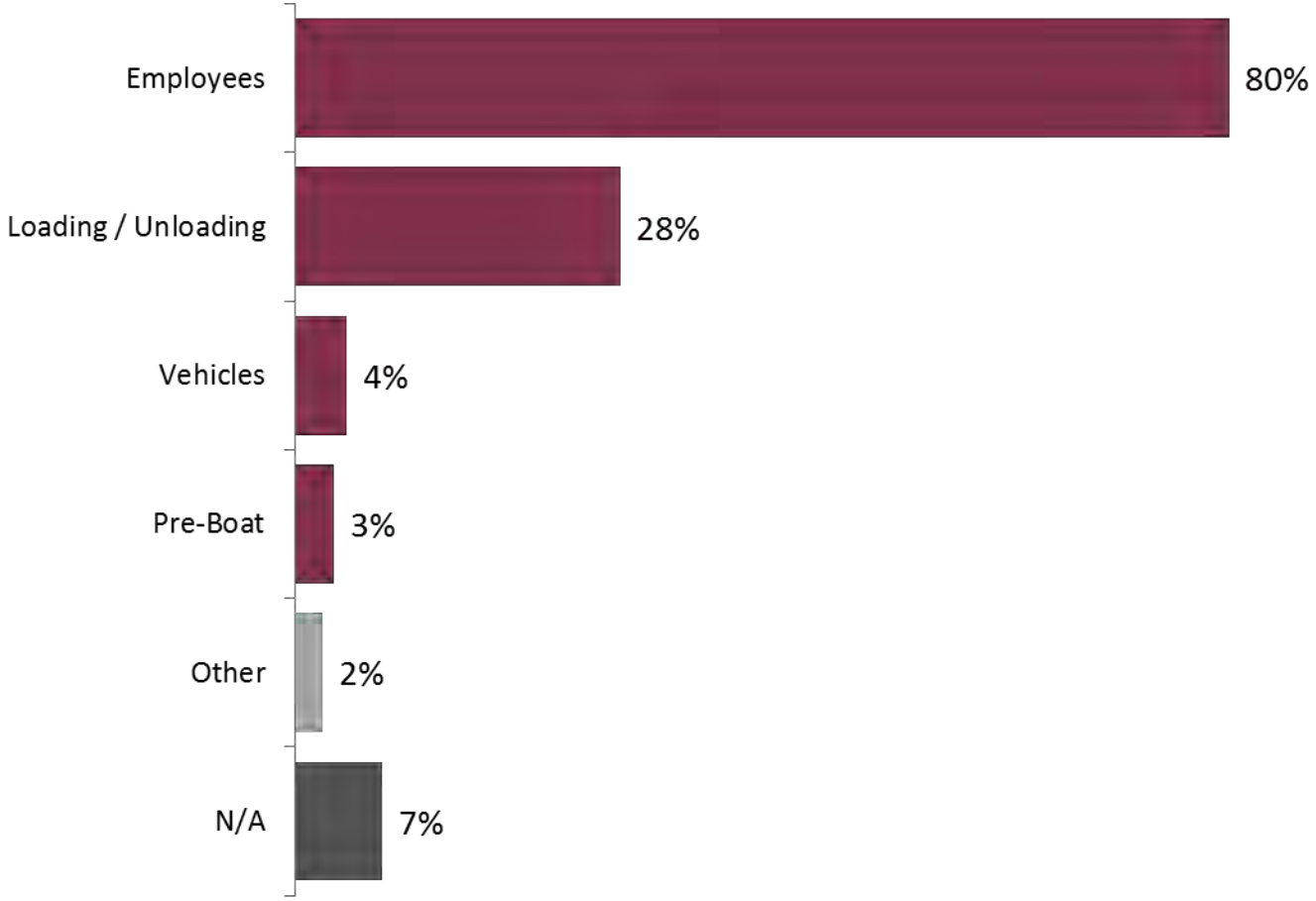
Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2819	616	196	61	347	227	119	17	109	591	470	43	23
WSF loading crews provide clear directions/ hand signals (2014)	**Imp.** (4-5)	**92%**	93%	90%	95%	92%	93%	93%	95%	94%	94%	91%	89%	97%
	Sat. (4-5)	**62%**	68%	68%	48%	71%	46%	58%	60%	69%	58%	49%	43%	80%
	Dissat. (1-2)	**15%**	11%	10%	23%	12%	26%	21%	18%	9%	16%	24%	27%	3%
2012	**Dissat.** (1-2)	**11%**	7%	14%	19%	9%	14%	--	--	5%	14%	16%	--	--

Top 3 Unsatisfactory Terminals	
Seattle	22%
Fauntleroy	19%
Bainbridge	16%

Example of Verbatim Complaints
Seattle - When loading in the AM some of the newer crew members that are responsible for motorcycle placement will often fail to make the appropriate signals or gestures to the on coming riders.
Seattle - Some deckhands give clear direction and some appear more to be shrugging than signaling. Sometimes I have to ask my wife which direction she thinks is being indicated.
Seattle - confusing hand signals, occasionally poor eye contact
Fauntleroy - vague or ambiguous signals about stopping and proceeding
Fauntleroy - workers on the boat were not paying attention, yelled at people who could not understand their cryptic hand gestures. making the boat very slow to load.
Bainbridge - The boarding process seems to never even itself out. I'm never sure why we are placed on the upper level side versus the middle. I may be earlier in line but rarely off the boat anywhere but towards the latter
Bainbridge - Inconsistent loading/unloading practice. Not making effort to load as many vehicles as possible.

Vehicle Loading Issues Mentioned

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



Q51d. What specific (vehicle loading) conditions made you dissatisfied (n=423)

WSF Vessels are well maintained and safe

Dissatisfaction with WSF vessels well maintained and safe is highest in Seattle/Bainbridge, Anacortes/SJI, Interisland, and Anacortes/BC.

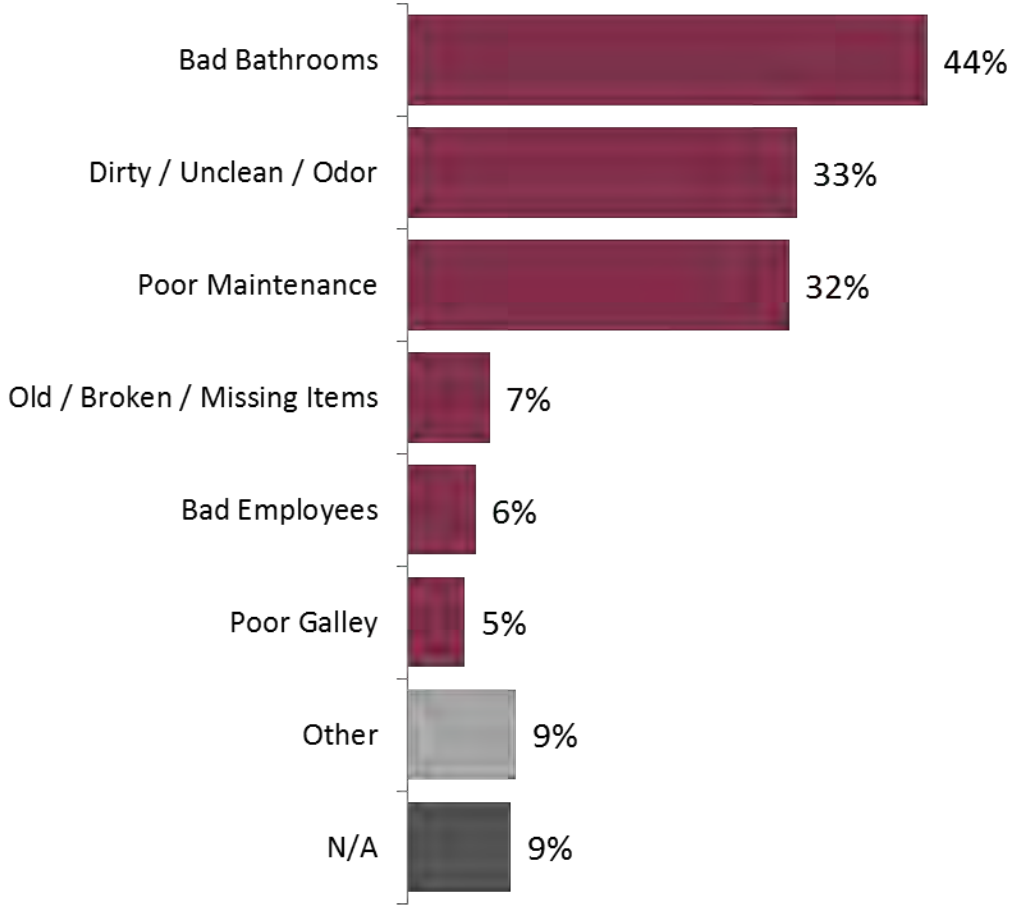
Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2895	669	248	57	352	216	119	17	113	561	477	43	23
WSF Vessels are well maintained and safe (2014)	**Imp.** (4-5)	**92%**	94%	94%	95%	91%	92%	93%	93%	91%	93%	90%	92%	78%
	Sat. (4-5)	**63%**	62%	46%	80%	66%	71%	66%	81%	84%	75%	47%	41%	60%
	Dissat. (1-2)	**13%**	14%	23%	5%	8%	8%	14%	7%	6%	6%	24%	31%	34%
2012	**Dissat.** (1-2)	**9%**	9%	22%	2%	6%	4%	--	--	0%	5%	16%	--	--

Top 4 Unsatisfactory Vessels	
Don't recall name	35%
Wenatchee	15%
Cathlamet	14%
Puyallup	13%

Example of Verbatim Complaints
Wenatchee - Rest rooms always stink. The smell comes outside into the seating areas because the doors are always left open. Constant loud sounds of toilets flushing is disconcerting. Seating areas are not well maintained
Wenatchee - Restrooms need to be remodeled they are in very bad shape
Wenatchee - Seats are filthy, food stuck in creases, floors are very dirty, accessible bathroom smells of urine with nasty toilet brush lying in the corner.
Wenatchee - Even when the bathrooms are 'clean', they are dirty. Where the floor and wall meet I don't believe ever gets mopped or washed
Cathlamet - The bathrooms were not clean and tables on each boat are dirty. It is a common sight to see passengers pull out our wipes ourselves to clean the table-top surface and/or benches.
Cathlamet - Seating areas and restrooms are filthy.
Cathlamet - The seats, tables and bathrooms are often dirty. Staff are near invisible. Passengers are allowed to put thier feet on seats, tables and even the windows with no consequence.
Puyallup - Overall the boats are in poor condition - paint and deck coating

Vessel Issues Mentioned

The Bathrooms are the top complaint among people who are dissatisfied.

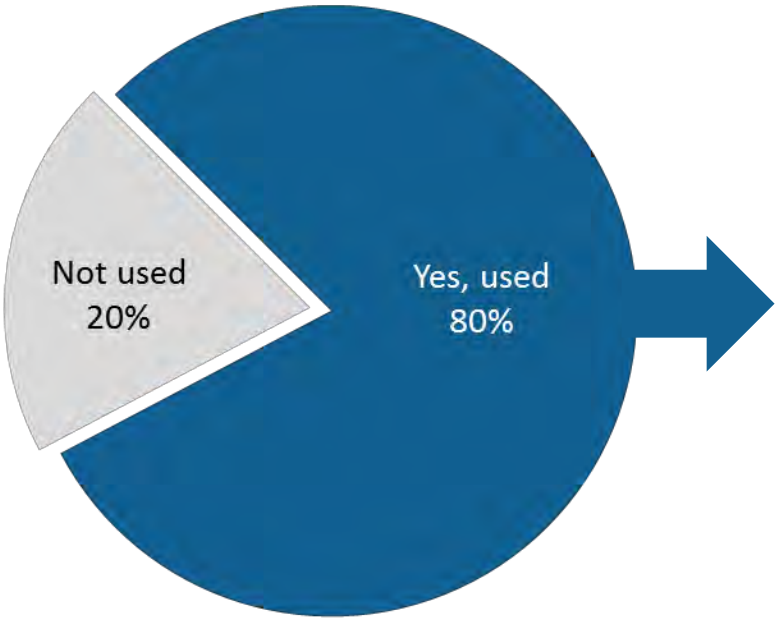


Q59c. What specific (vessel) conditions made you dissatisfied (n=361)

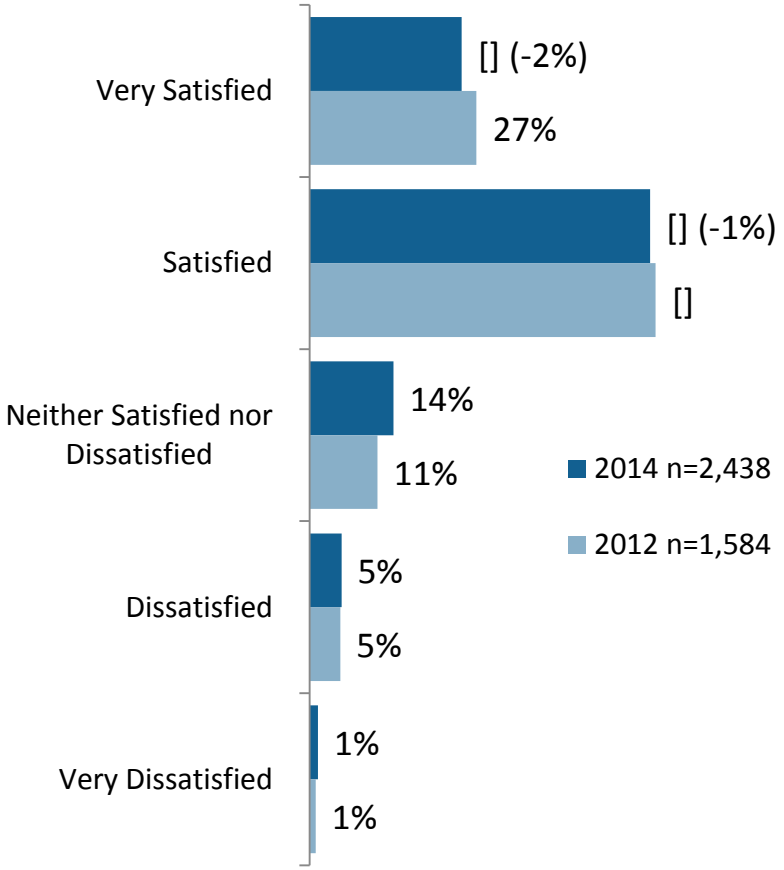
Using WSF Website

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

Used WSF Website
n=3022



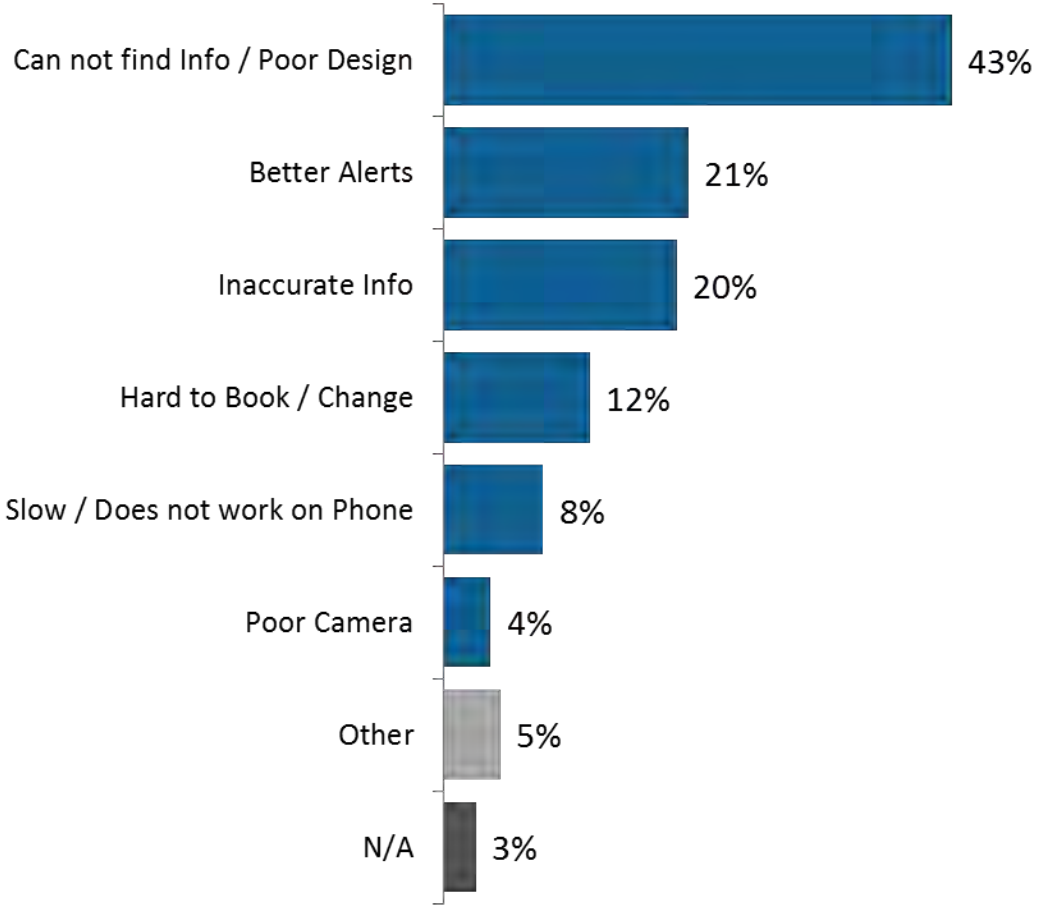
Experience Using Website



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 and for that information to be accurate where the most mentioned issues



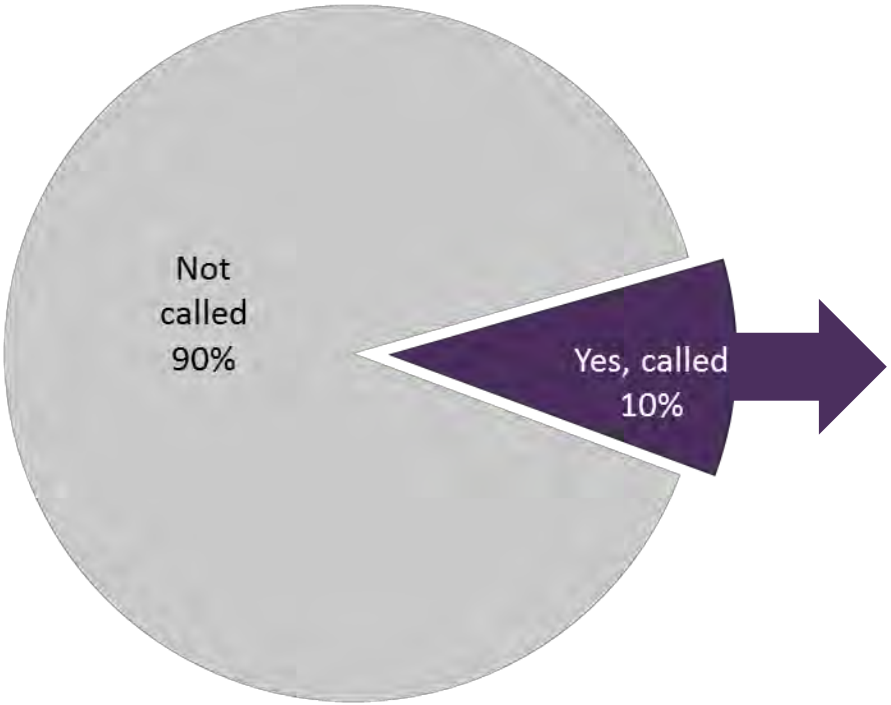
Q.67 What specifically about your experience with the WSF website made you dissatisfied? Please be as specific as possible. (n=171)

Calling WSF Customer Service by Phone

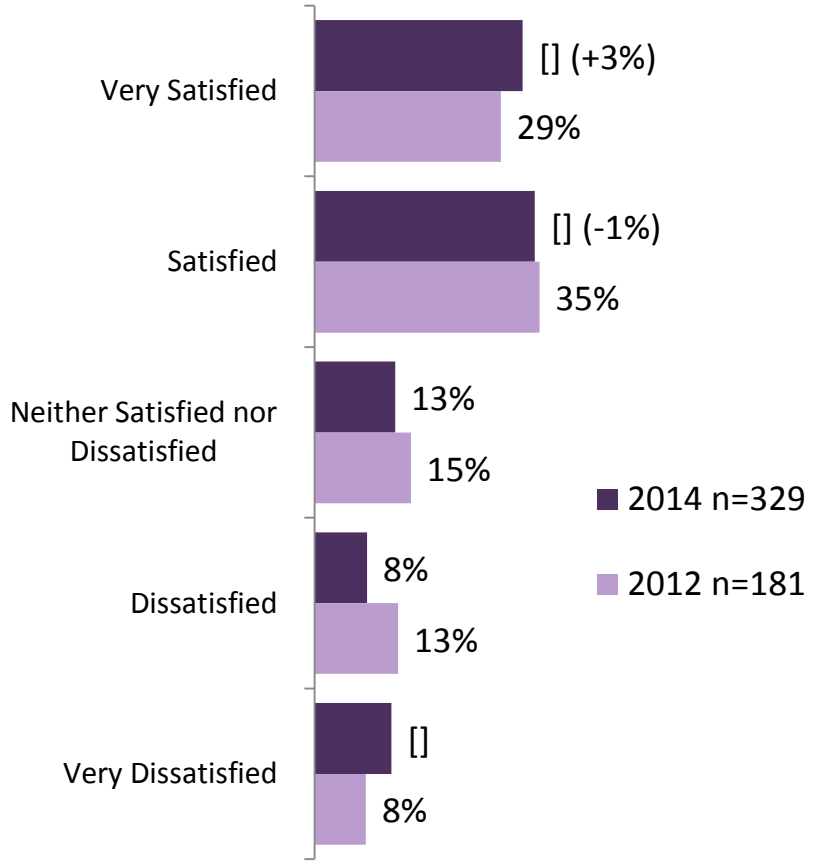
Very few respondents have contacted WSF customer service by phone. Of those respondents saying they have called, the majority are satisfied with their experience.

Called WSF Customer Service

n=3022



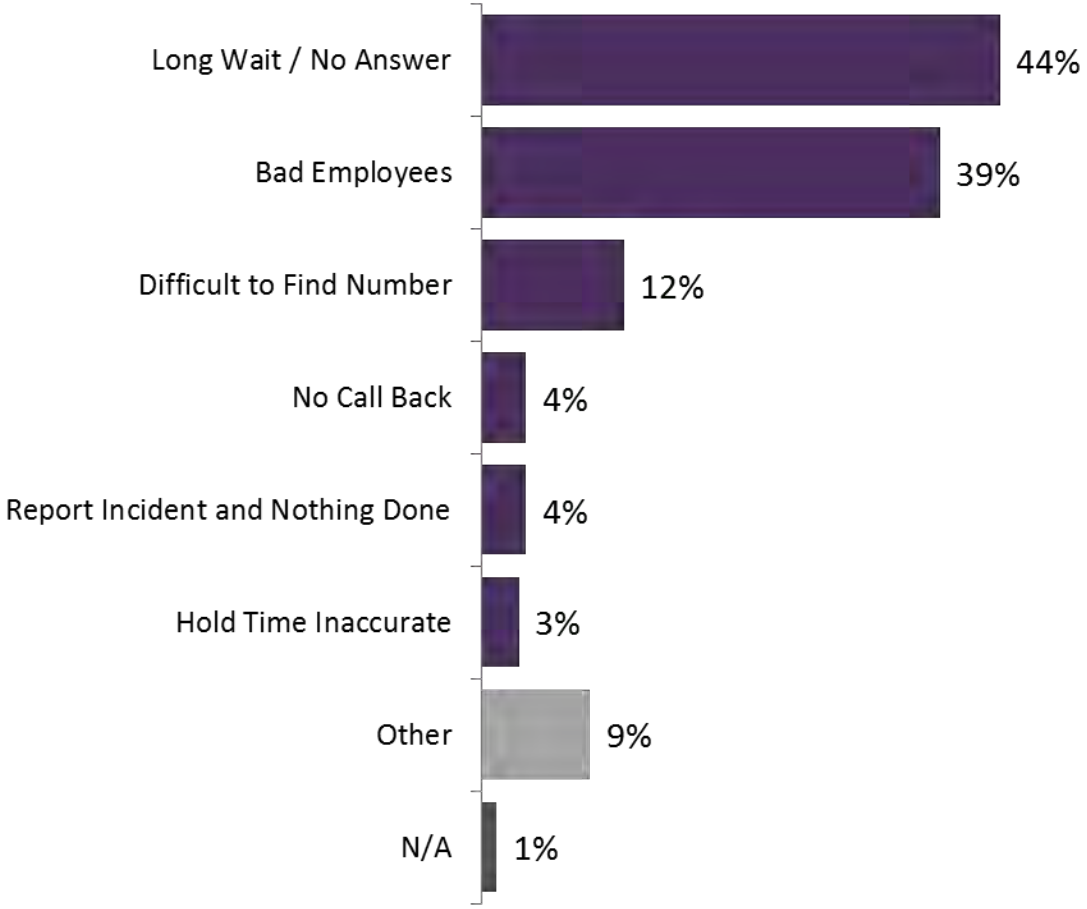
Experience Calling WSF



65B. During the Summer (June 15th through September 20th) period, have you for any reason called WSF by phone?
68. How satisfied were you with your experience calling the WSF by phone?

Phone Issues Mentioned

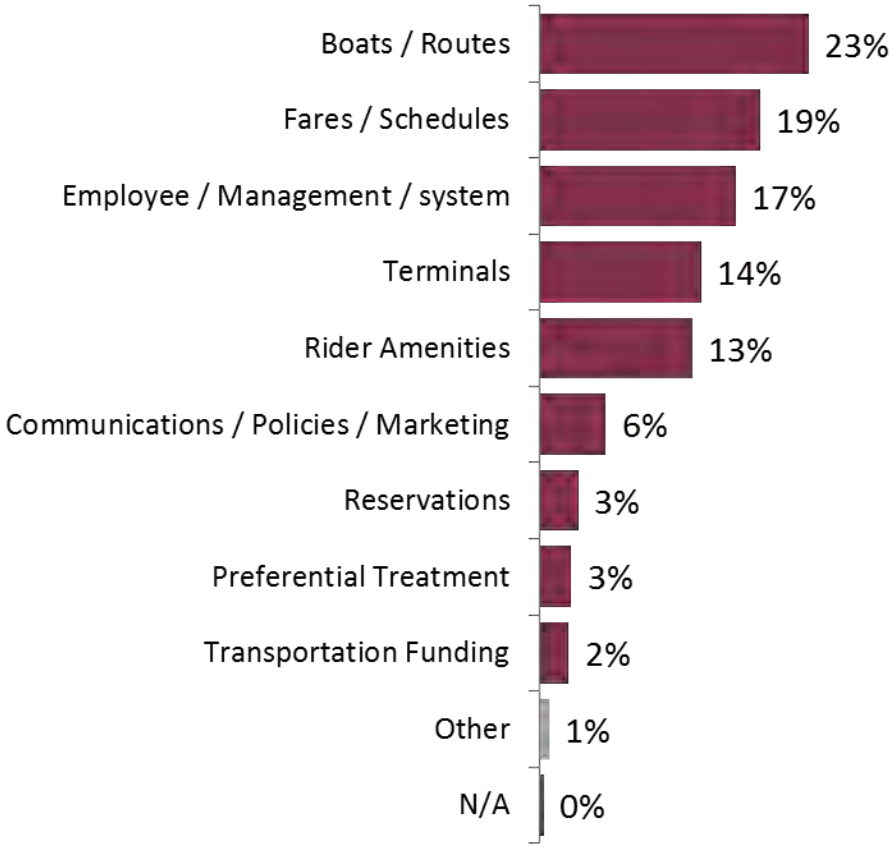
No answer or long wait times and bad customer service topped the list of phone complaints among people who are dissatisfied.



Q69 What specifically about your experience calling WSF by phone made you dissatisfied? (n=77)

Suggested Areas to Improve Service*

Responses containing "boats" and "Routes" are suggested the most

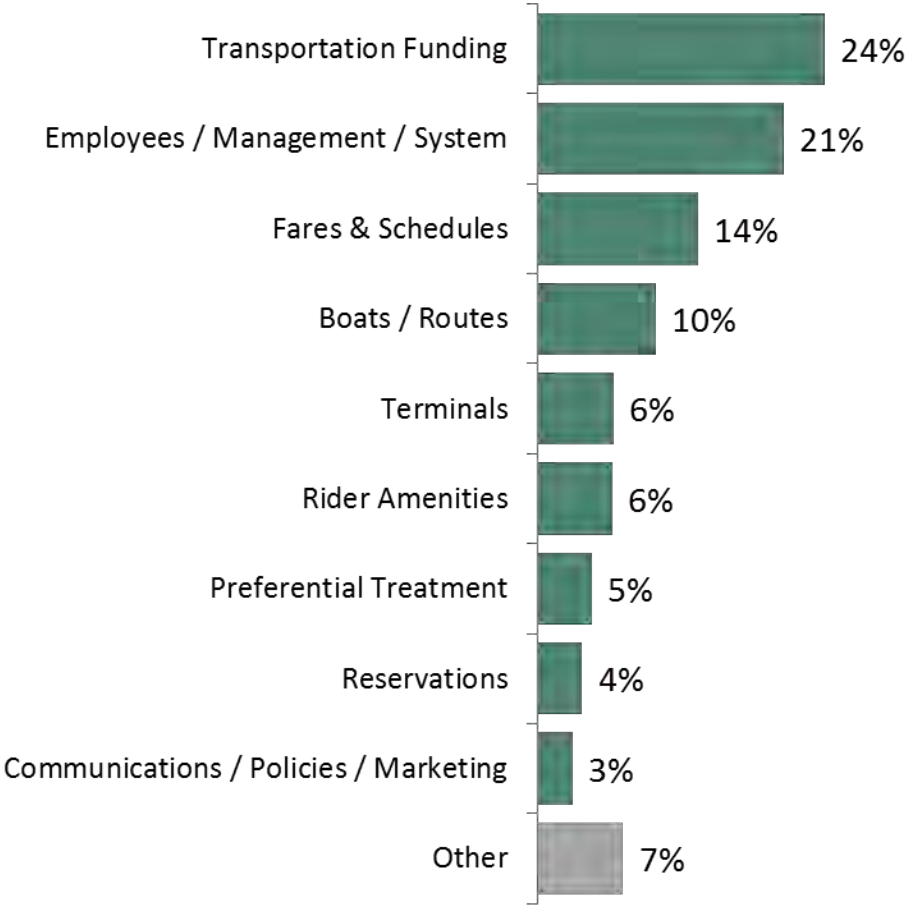


Q70 Beyond lowering fares, what other suggestions might you give WSF and state decision makers that would improve or strengthen WSF customer service (n=2241)

**Data is unweighted, and includes responses past the end date of the summer ferry survey period.*

Additional Issues Mentioned*

The top three categories center around funding and management of WSF



Q80 Do you have any additional thoughts regarding the ferry system you would like to share? (n=1,026)
**Data is unweighted, and includes responses past the end date of the summer ferry survey period.*

Questions & Answers

THANK YOU!

For More Information Contact:

Reema Griffith, WSTC Executive Director

Bill Young, Survey Program Project Manager

360.705.7070