



Washington State Transportation Commission
Ferry Riders Opinion Group (FROG) Survey Panel
WSF Reservation Survey June 2016
Presentation

Methodology



- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG) survey panel.
- ▶ A total of 5,414 surveys were completed in July 2016 (July 15-26, 2016).
- ▶ WSF sent an email to their database of reservation users inviting them to join the FROG and take the reservation survey. WSTC conducted intercepts on WSF vessels during the survey period that directed new FROG members to also take the survey. Approximately 1,500 surveys (included in the total completed number above) were completed from those efforts.
- ▶ Data was weighted by route according to the July 2016 WSF traffic report, based on the last trip taken.

▶ Total & sub-group sample sizes and definitions:

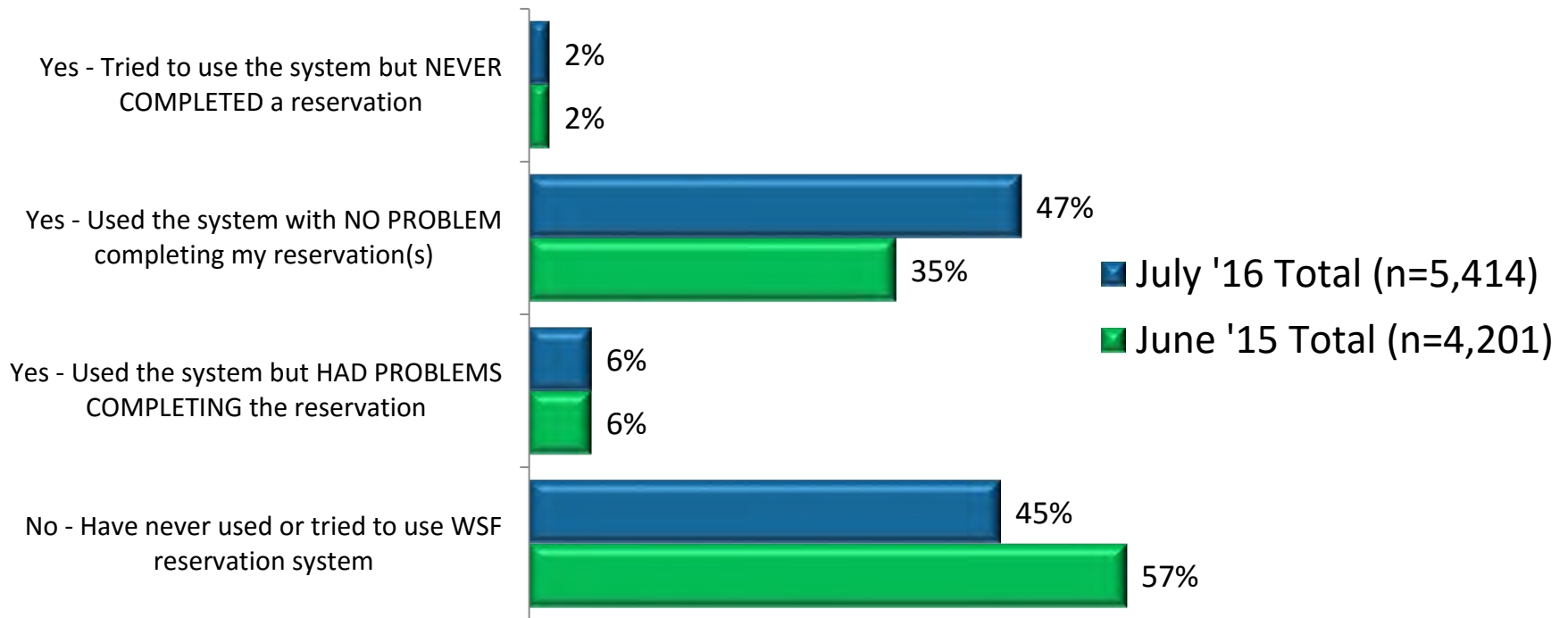
Sample	Graph Name	Definition
5,414	Total	Total number of completed surveys system-wide
2,150	SJ Riders	Riders that used the San Juan / Inter-Island routes last
141	BC Riders	Riders that used the Sidney BC route last
434	PT Riders	Riders that used the Port Townsend – Coupeville route last
1,198	Full Time SJ	Full time SJ Island residents that used SJ routes last
591	SJ Island	Permanent residents of San Juan Island
436	Orcas Island	Permanent residents of Orcas Island
224	Lopez	Permanent residents of Lopez Island
630	Dissatisfied Users	Reservation users that are dissatisfied with the system
3,024	Satisfied Users	Reservation users that are satisfied with the system
2,725	Res Routes	Riders who last used one of the three reservation routes
2,669	Non-Res Routes	Riders who last used a non-reservation route

Ever Used Or Tried to Use WSF Reservations



Fifty five percent (55%) of the FROG panel members responding to the survey have used or tried to use the WSF reservation system. Approximately 86% of those who used the reservation system had no problems completing their reservation. Eleven percent (11%) that used the system had problems and 4% tried to use the system but never completed the reservation. The percent of those in 2016 who have used the system with no problems is an improvement over 2015. Over half (55%) of those dissatisfied with the system reported that they did not have a problem completing any of their reservations.

WSF Reservation System Usage By All Riders



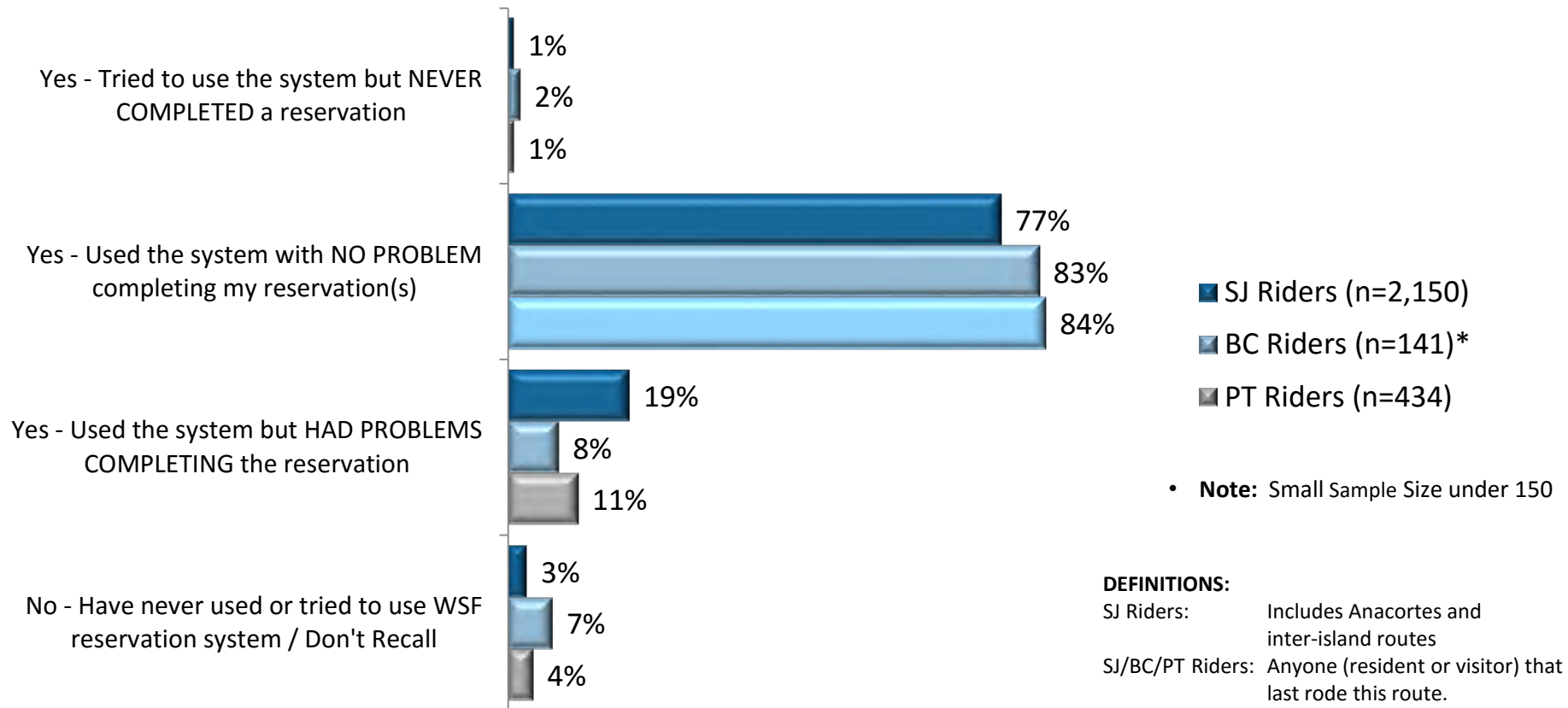
Q.4a Have you ever used or tried to use WSF reservation system?

Ever Used Or Tried to Use Resvation By Route



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

WSF Reservation System Usage by Route



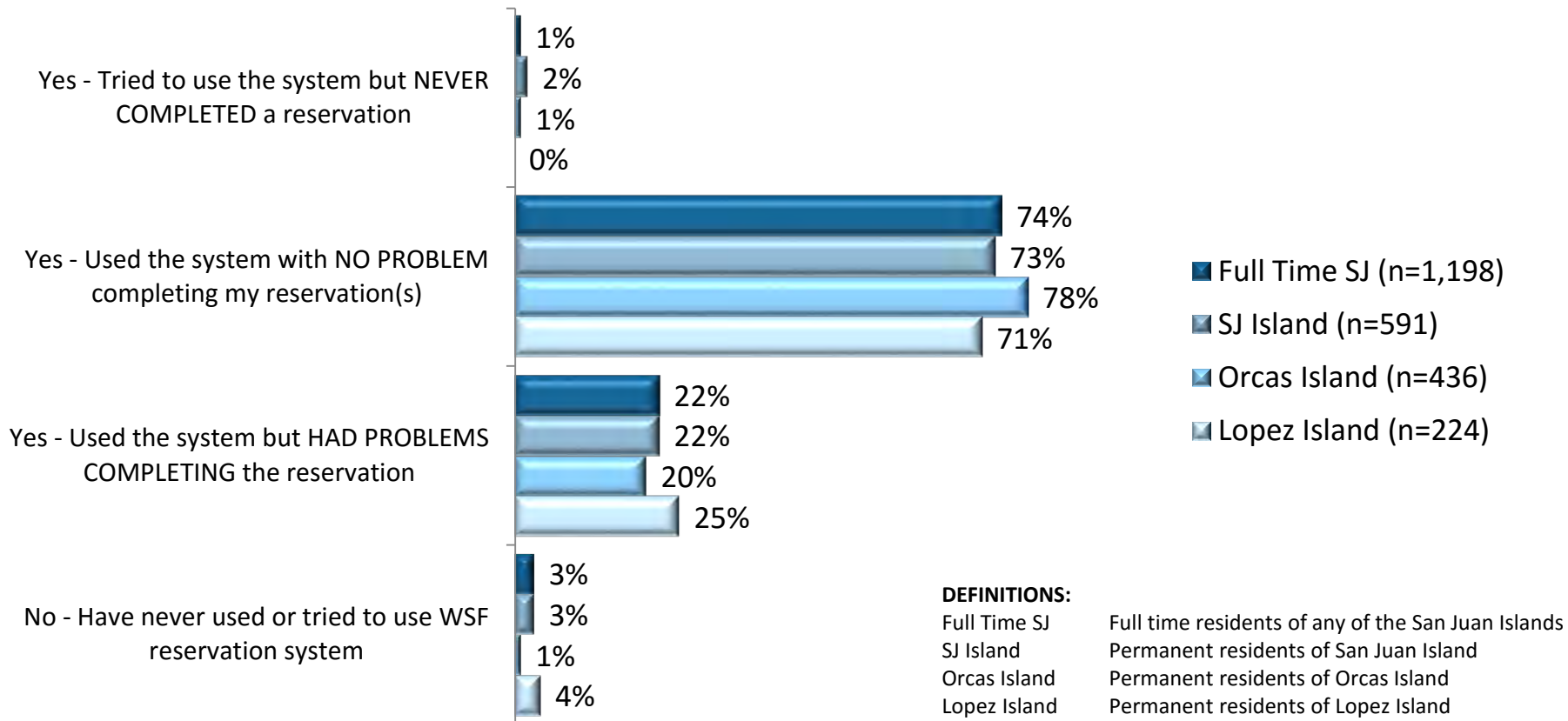
Q.4a Have you ever used or tried to use WSF reservation system?

Ever Used Or Tried to Use Reservation By Island



Residents of Lopez Island (25%) had a slightly higher concentration of problems completing their reservations than residents on either San Juan (22%) or Orcas (20%) islands.

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



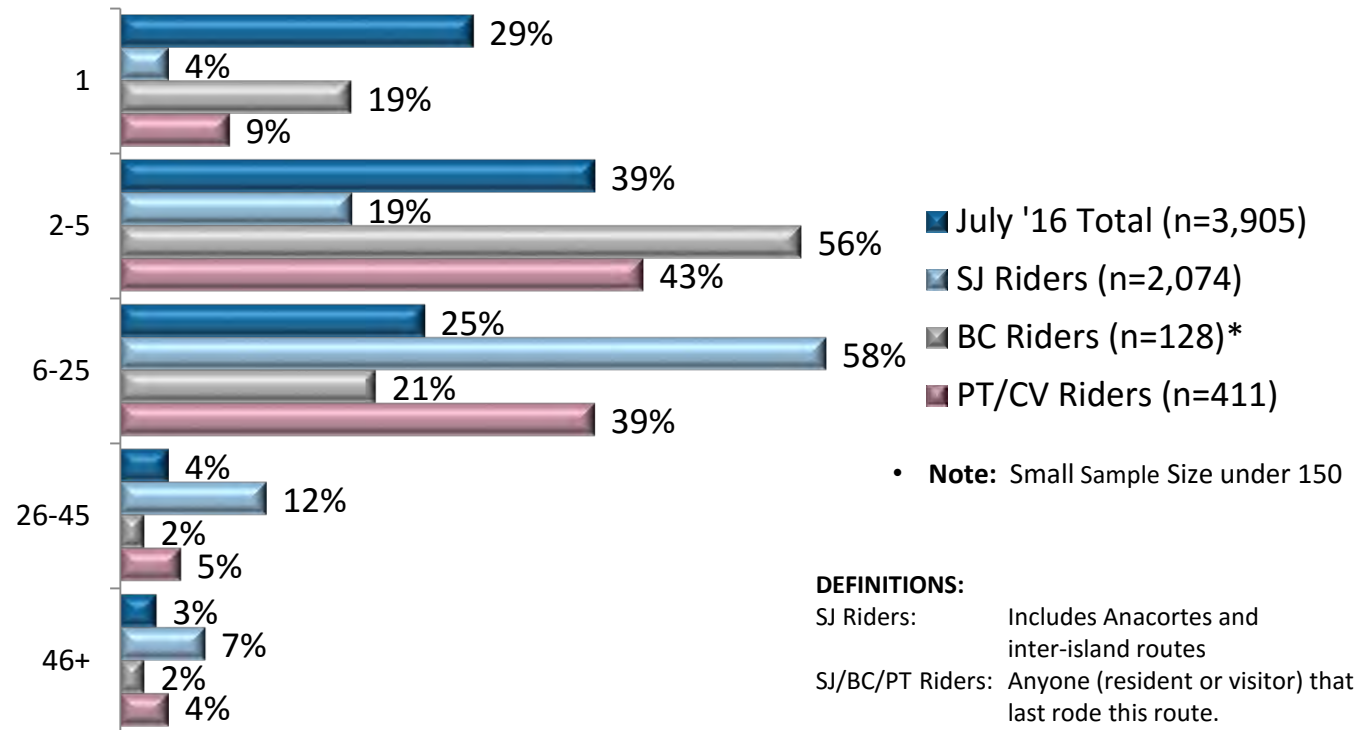
Q.4a Have you ever used or tried to use WSF reservation system?

Number of Yearly Reservations



System-wide the 3,905 respondents made an average of 6.9 reservations in the last year. Those that used the San Juan Island routes last averaged 16.1 reservations per year compared to 9.4 for those that last used the Port Townsend route. Those living full time on San Juan (19.4), Orcas (20.1), and Lopez (19.9) all make more reservations on average than either system-wide (6.9) or San Juan visitors (5.2). Those dissatisfied with the reservation system made statistically more reservations (10.2) than those satisfied (6.6).

WSF Reservations Made In Last Year



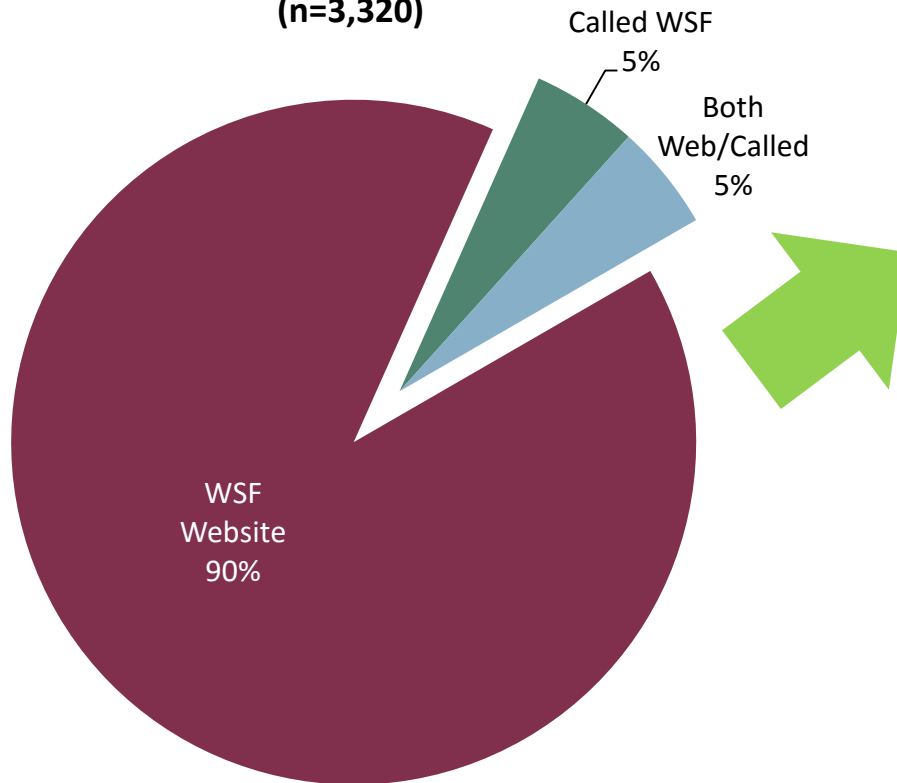
Q.6d Approximately how many different reservations have you made in the last year?

No Reservation Problems

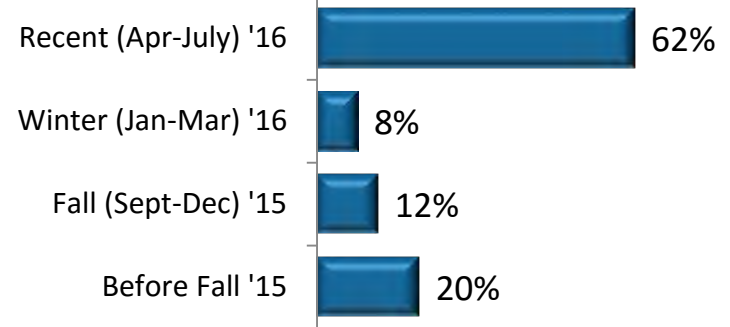


Of the 3,320 riders that have had no problems making reservations, 95% used the WSF website and 10% called WSF, with the majority reporting this activity happened recently (62% Apr-July '16).

**Mode of Reservation Contact
(n=3,320)**



**Reservation Contact Period
(multiple mentions)**



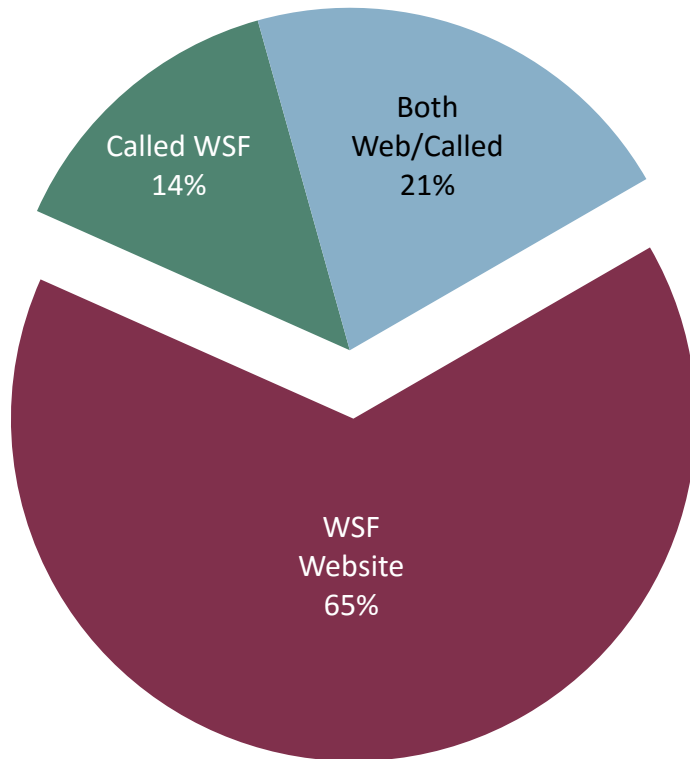
Q4a3a In which of the following months did you try to use WSF web/phone reservation program? Q4a3b Which of the following options (web or phone) did you use when you were unable to complete your reservation?

Had Reservation Problems - '16 Failure Mode

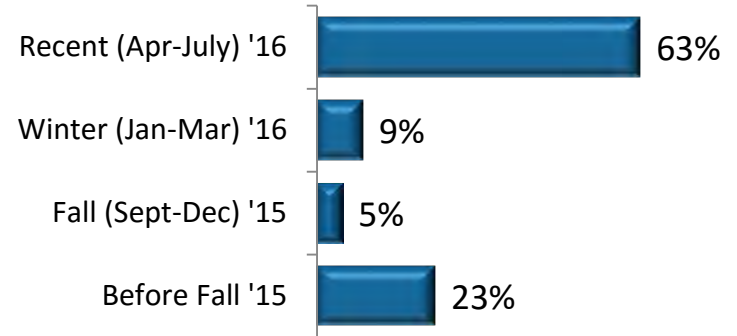


Of the 585 riders that had problems using reservations, 86% used the WSF website and 35% called WSF, with the majority reporting this activity happened in the last four months (63%). The problem was reported as the last time they used reservations in 51% of the cases.

**Mode of Reservation Contact
(n=585)**



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



Used Reservation Since Last Problem



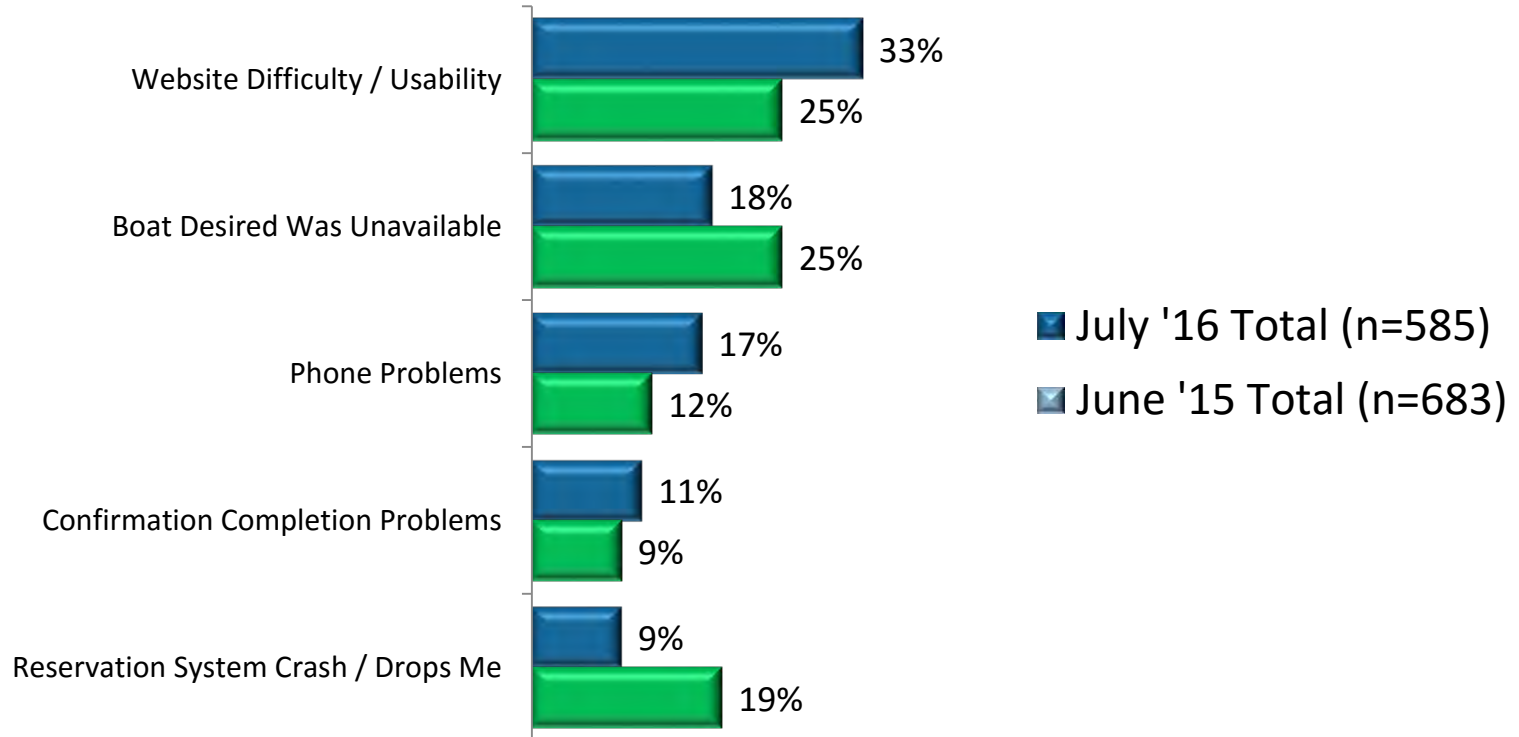
Q4a2a In which of the following months did you try to use WSF web/phone reservation program? Q4a2b Which of the following options (web or phone) did you use when you were unable to complete your reservation? Q4a2d Have you made any further reservation(s) since you had your last problem?

Had Reservation Problems



Of the 585 riders who had problems completing their reservation, the most mentioned reason was “Website Difficulty/Usability” issues (33%) and “Boat Desired Was Unavailable” (18%). The next reason for the reservation system failing them is “Phone Problems”(17%). Down ten percentage points as a failure reason is “Reservation System Crash.”

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



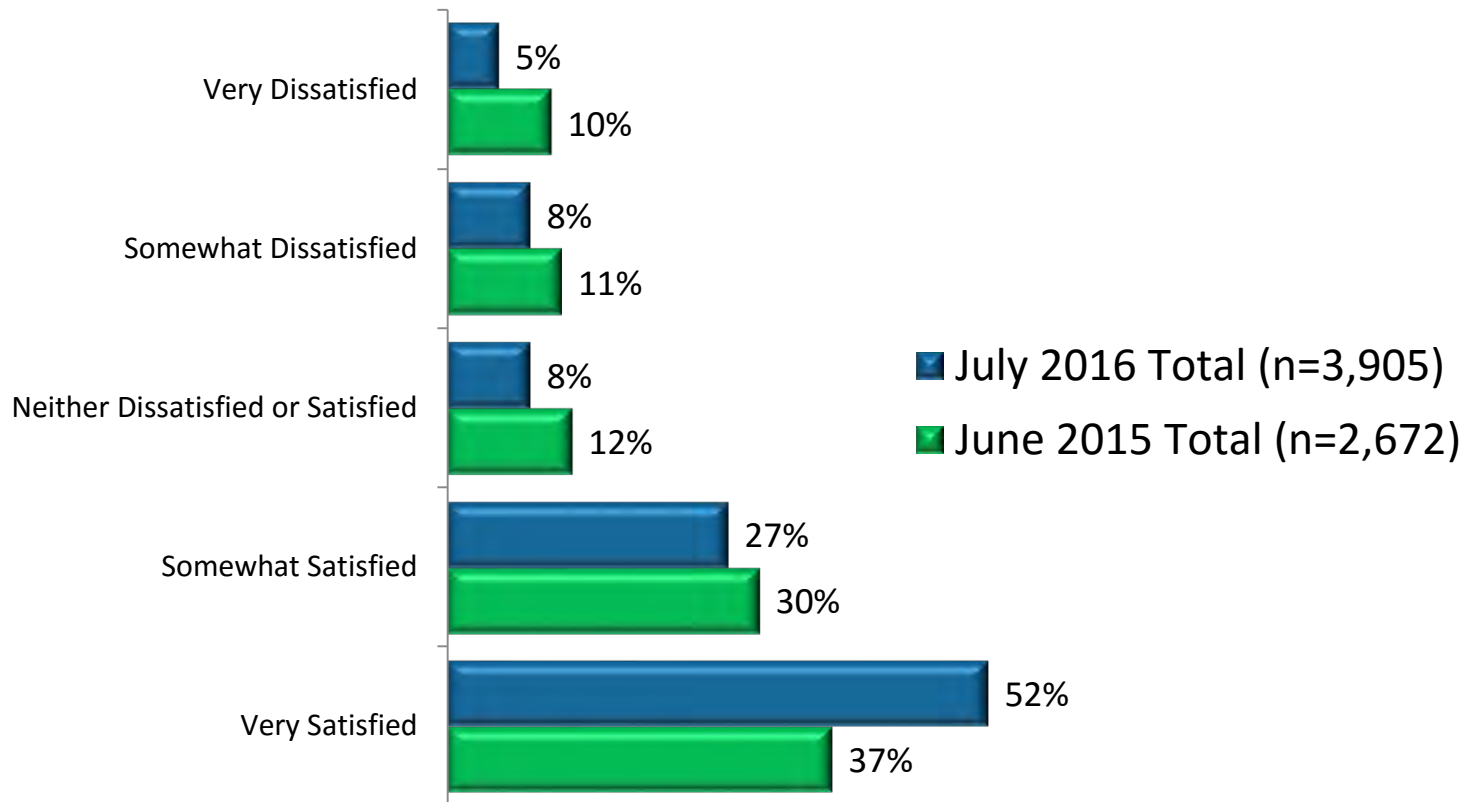
Q.4a2c Why were you unable to complete your reservation?

Reservation System Rating



The 3,905 riders who have used the WSF reservation system were asked how they would rate it. The majority of users are satisfied with the system (79%) with 13% being dissatisfied. This is an improvement over the results from 2015.

WSF Reservation System Rating – All Routes



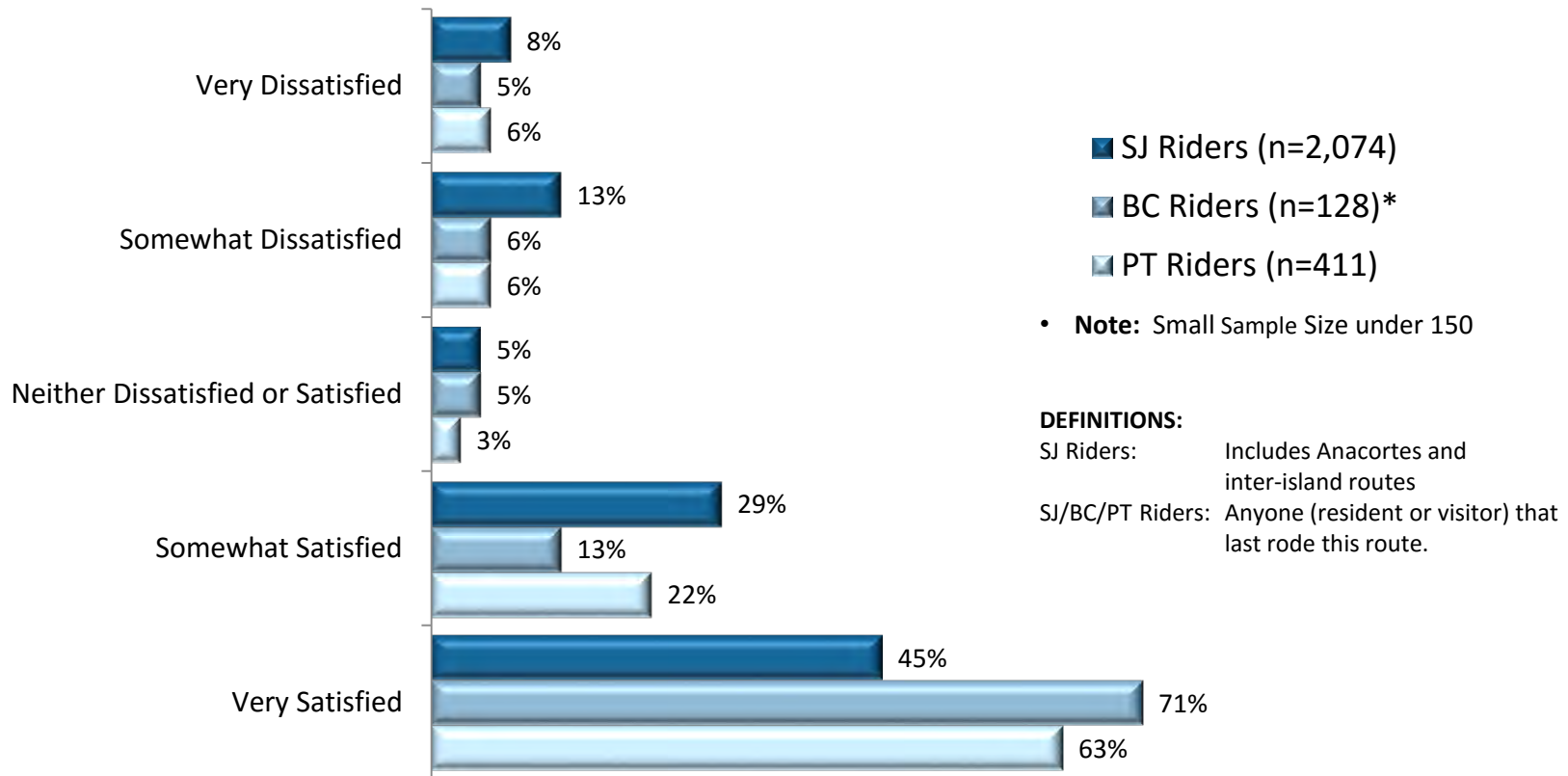
Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation System Rating By Route



When broken out by last route used, the riders on the Anacortes - Sidney (84%) and Port Townsend – Coupeville route (85%) are much more satisfied (Very + Somewhat) with the reservation system than those who last used the Anacortes – San Juan Islands route (74%).

WSF Reservation System Rating by Last Route Taken



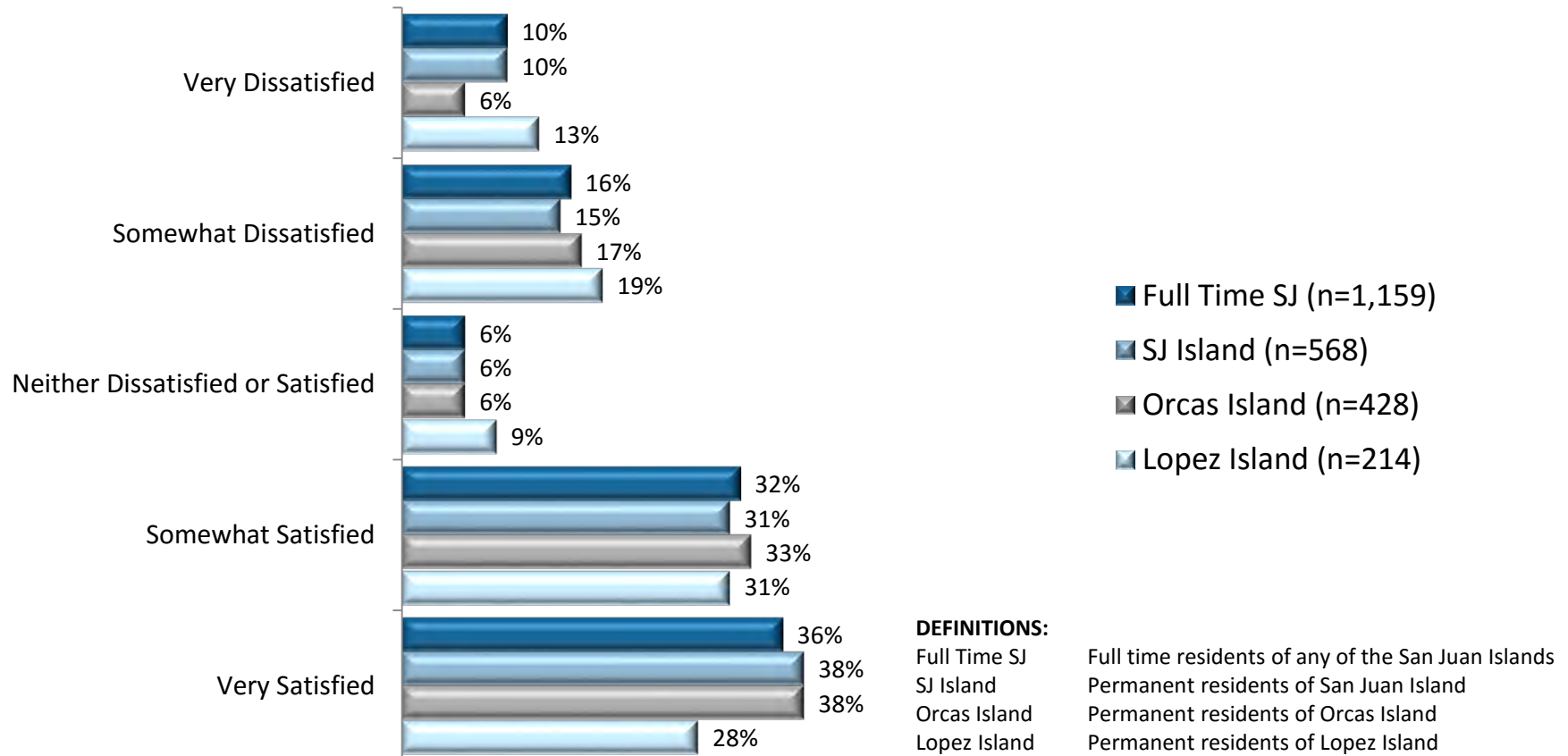
Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation System Rating By Island



When broken out by the San Juan County residency, riders living on Lopez (32%) are the most dissatisfied (Very + Somewhat) followed by San Juan Island (25%) and Orcas Island (23%).

WSF Reservation System Rating - Full Time Resident By Island



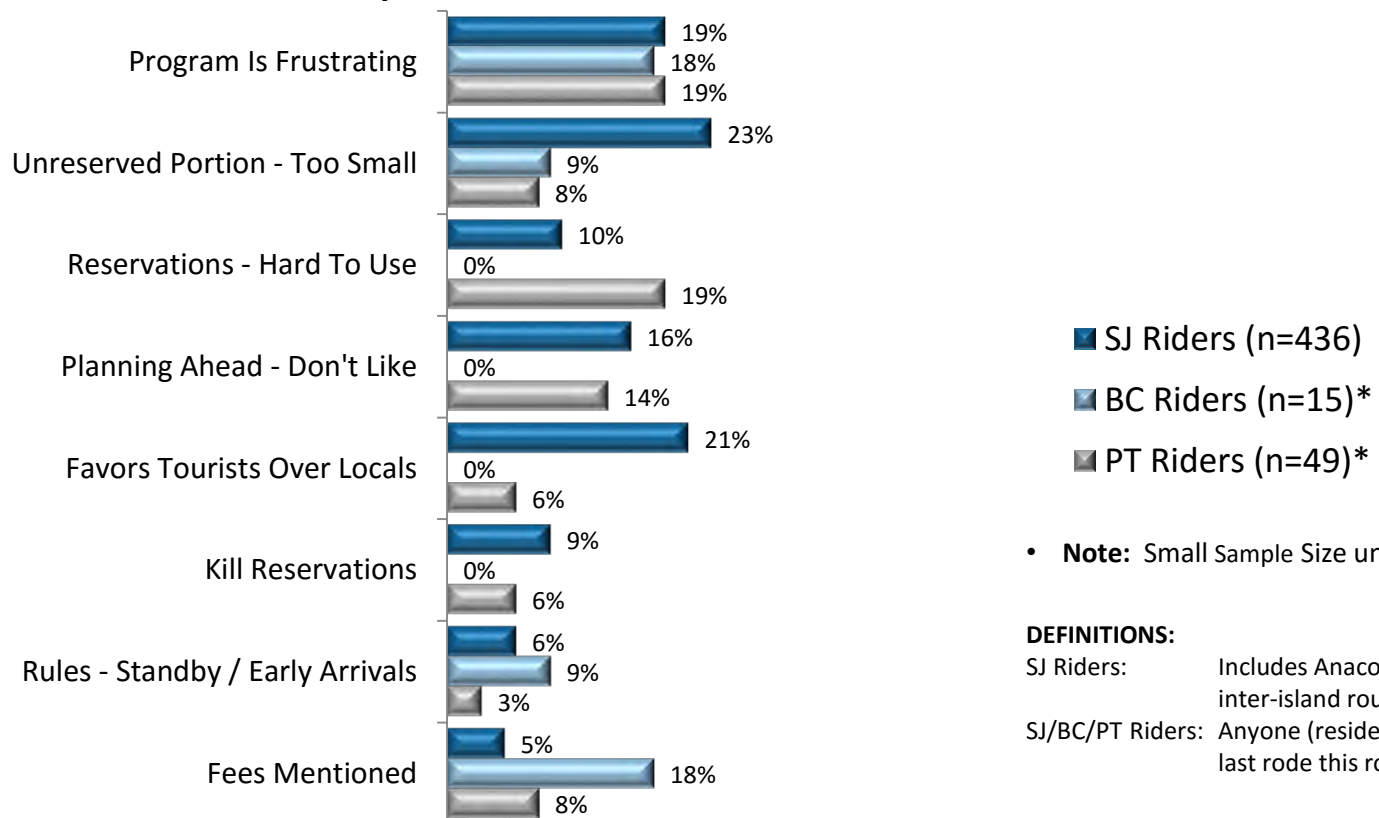
Q.5 Overall, based on your experience, how would you rate the reservation system?

Dissatisfied Users



For riders on the San Juan Island routes, the most often cited reason for being dissatisfied with the reservation system is “Too Small Unreserved Portion” (23%) followed by “Favors Tourists Over Locals” (21%) and “Program Is Frustrating” (19%).

The Part Of The Reservation System I Am Dissatisfied With Is ... By Reservation Route Users



• **Note:** Small Sample Size under 100

DEFINITIONS:

SJ Riders: Includes Anacortes and inter-island routes

SJ/BC/PT Riders: Anyone (resident or visitor) that last rode this route.

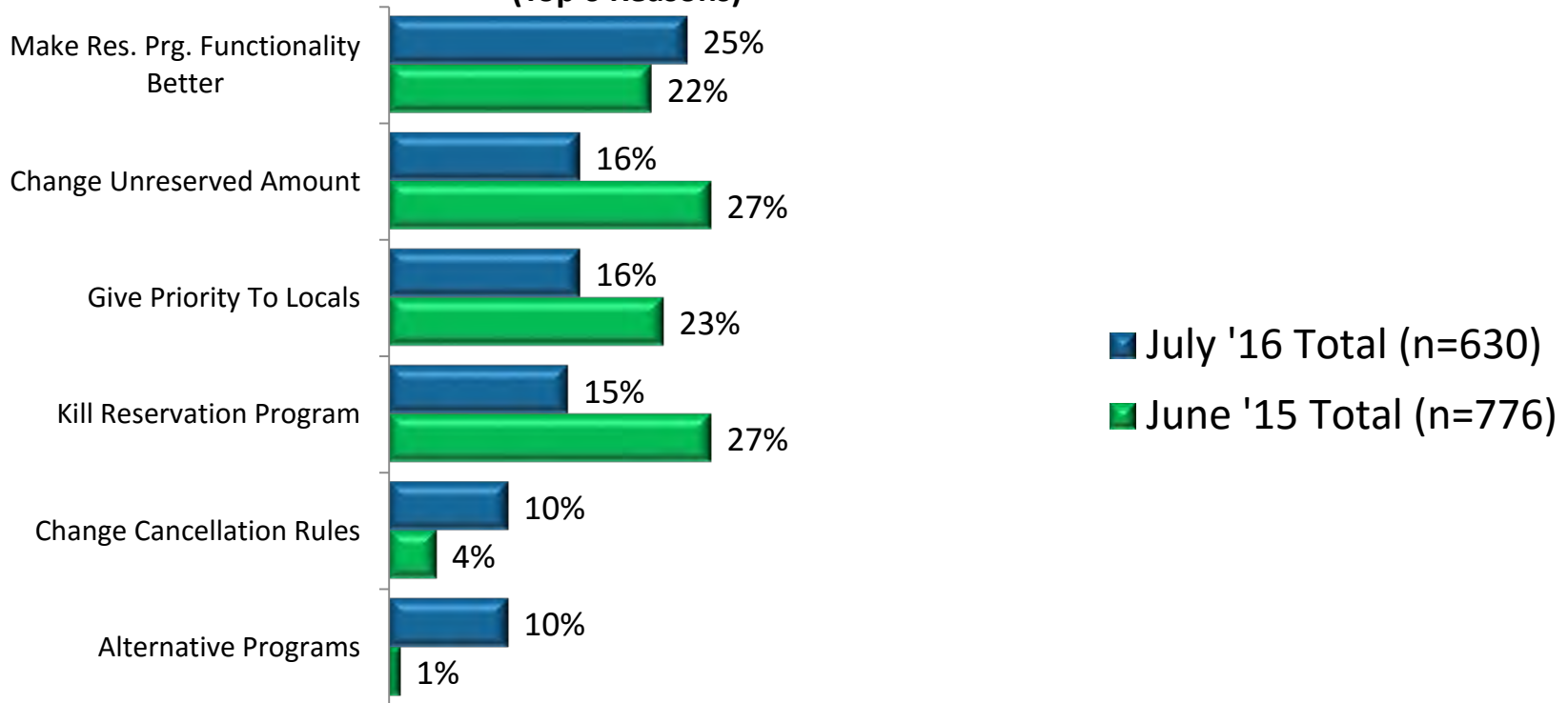
Q.6a Based on your experience, what specific parts of the reservation system are you dissatisfied with?

Dissatisfied Users - Suggested Fixes



Of the 630 dissatisfied users of the reservation system, “Make Reservations Functionality Better” (25%) is the most often cited changes they would like. This suggestion was followed by “Change Unreserved Amount” (16%), “Give Priority To Local Residents” (16%) and “Kill Reservation Program” (15%).

**How I Would Change The System To Work For Me
(Top 6 Reasons)**



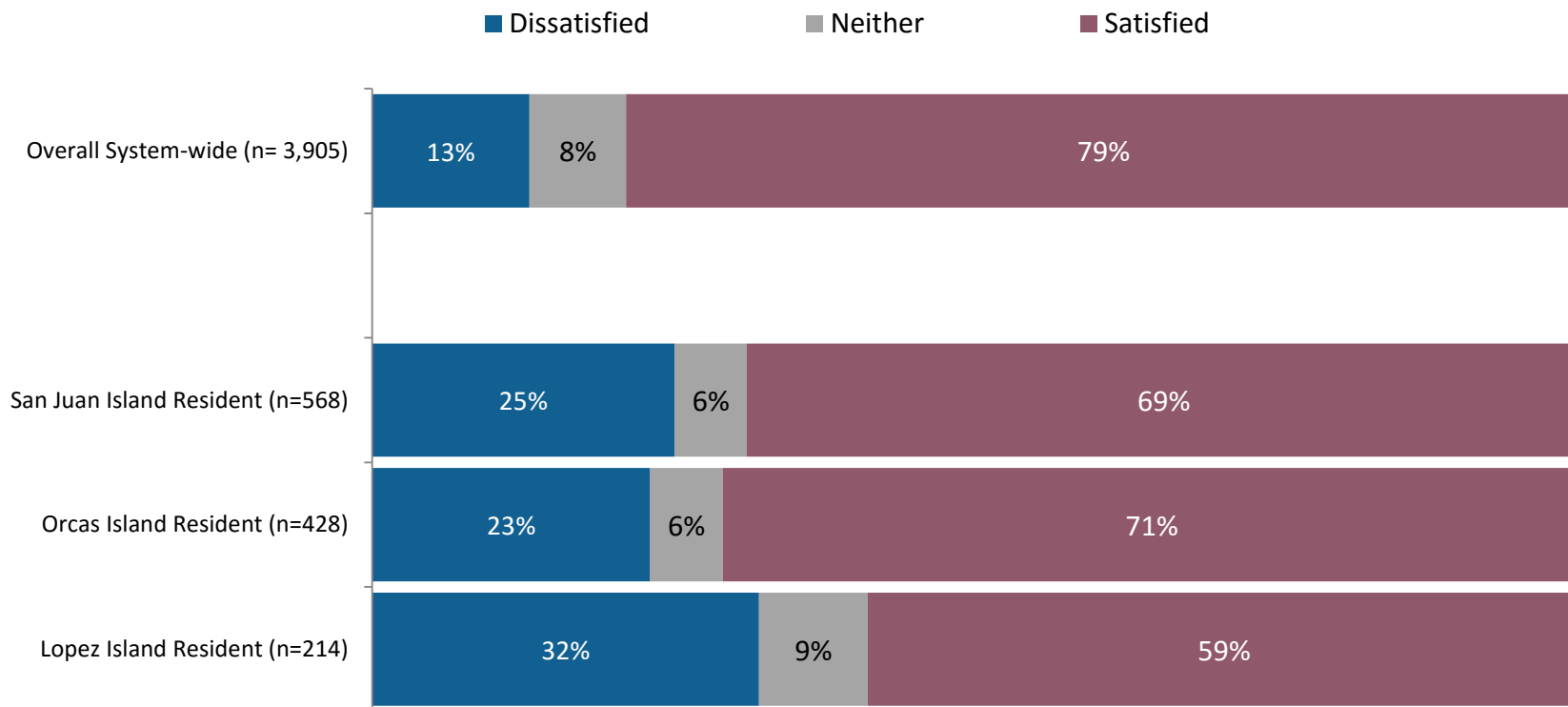
Q.6b Now tell us what we can do to change it so it might work better for you,

Satisfaction Rating By Island



System-wide 13% are dissatisfied with the reservation system. Residents of Lopez (32%) Island are the most dissatisfied followed by San Juan Island (25%) and Orcas residents (23%).

WSF Reservation System Satisfaction By SJ Islands Residency



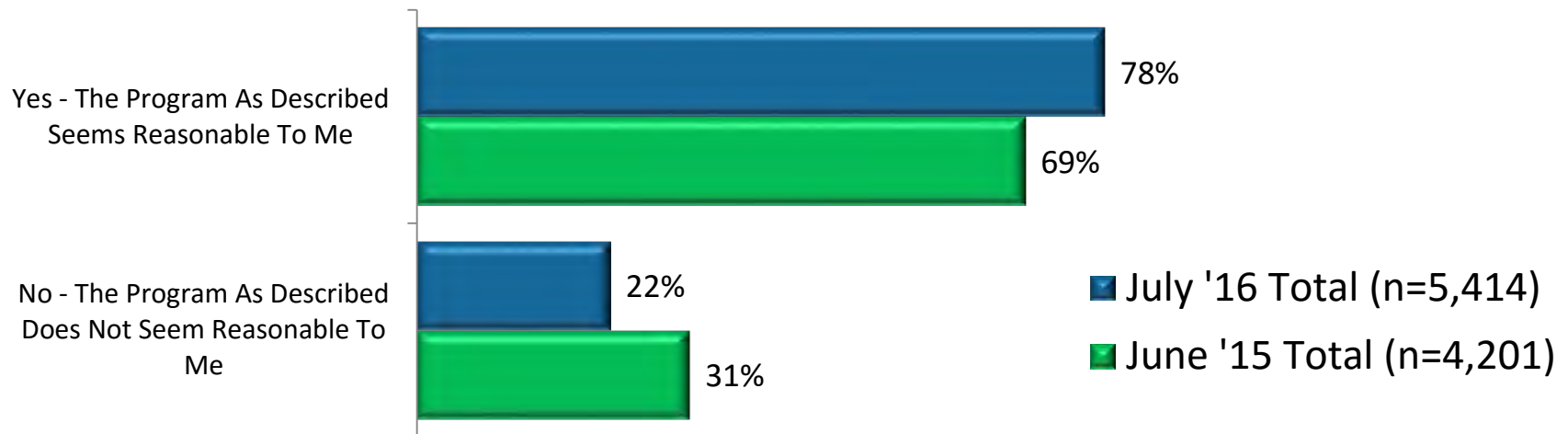
Q2a. What was the most recent WSF route you took? AND Q.5 Overall, based on your experience, how would you rate the reservation system?

Reservation Reasonableness



A description of the current WSF reservation system was provided and respondents were asked if it seemed reasonable to them. A majority (78%) said it did seem reasonable, while 22% said it seemed unreasonable.

Reasonableness of WSF Reservation Program



Q.7a Here is how the reservation system currently works:

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

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

For San Juan sailings:

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

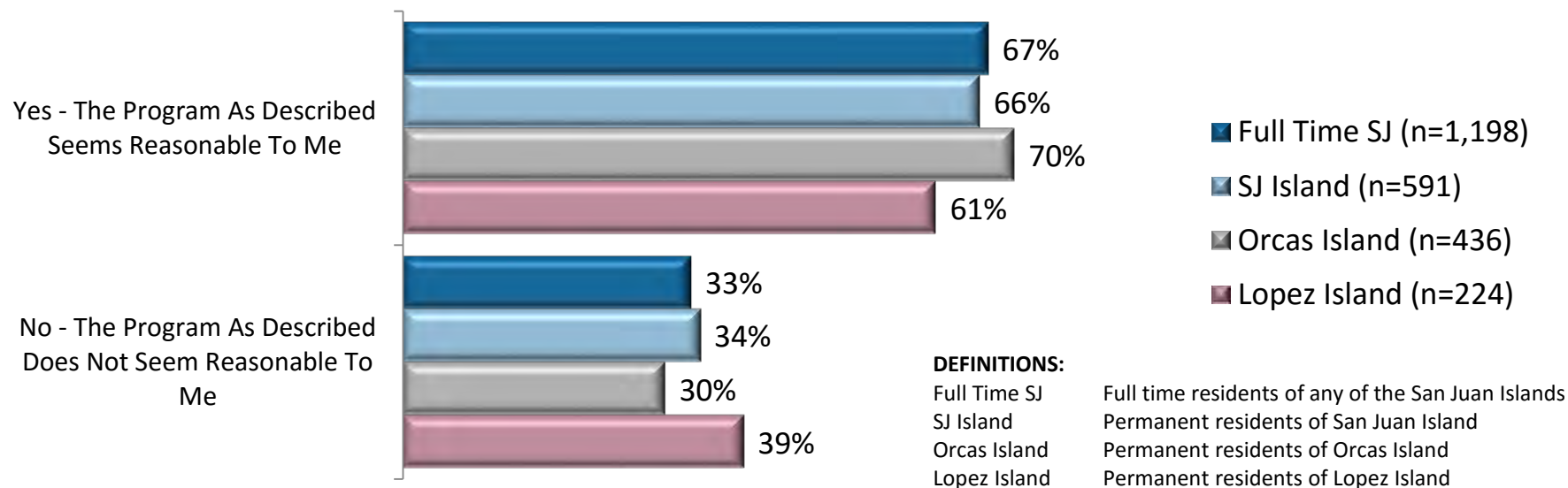
Based upon the above, does the WSF reservation program seem reasonable to you?

Resv. Reasonableness By Island



Based on residency, riders living on Lopez (39%) Island have the highest “unreasonable” response compared to the rest of the San Juan Islands.

Reasonableness of WSF Reservation Program By Residency



Q.7a Here is how the reservation system currently works:

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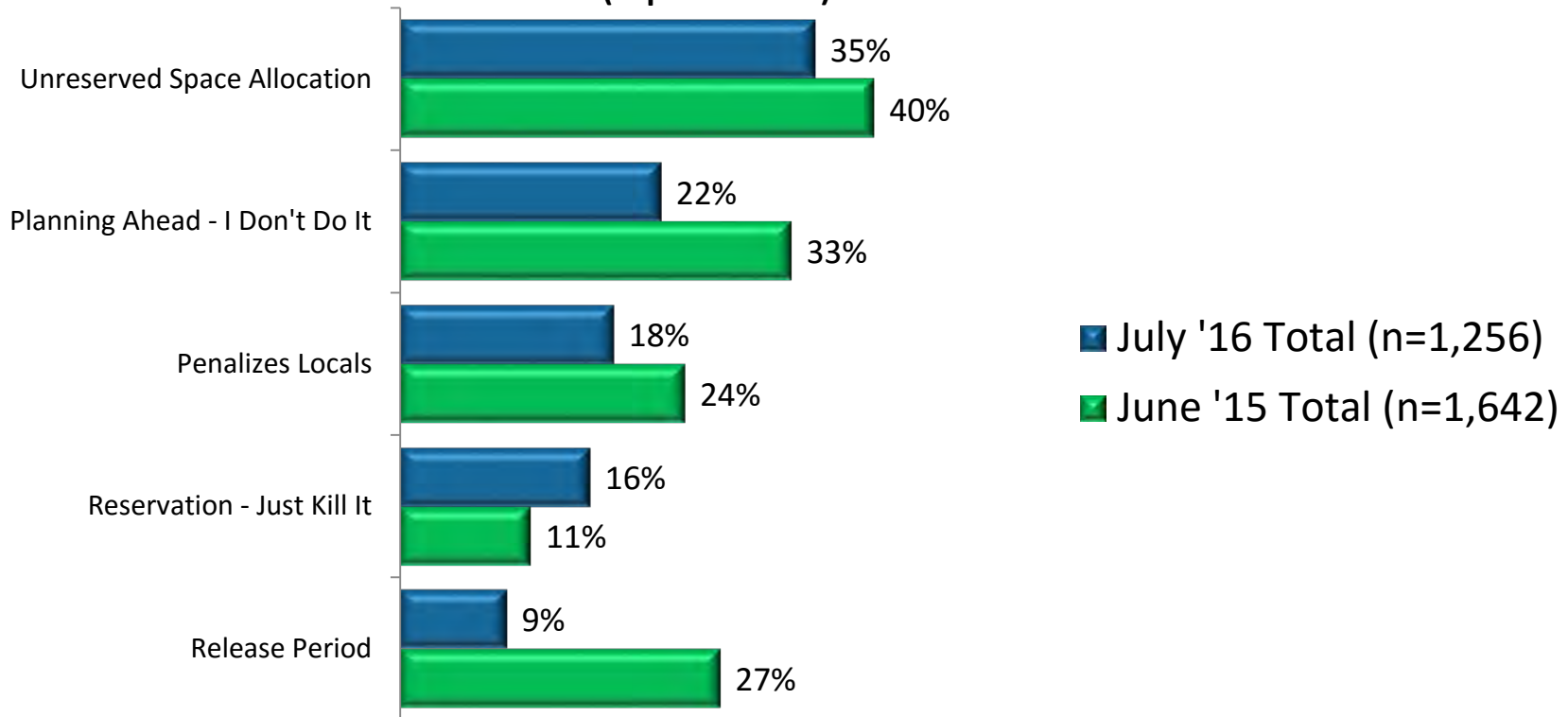
Based upon the above, does the WSF reservation program seem reasonable to you?

Reasons For Being Unreasonable



The 1,256 riders who felt the reservation system description as presented was unreasonable were asked why and what they might change. The most often mentioned reason for being unreasonable was the “Unreserved Space Allocation” (35%) and the rider not liking to “Plan Ahead” (22%). Of lesser mention was that the system as described “Penalizes Locals” (18%).

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



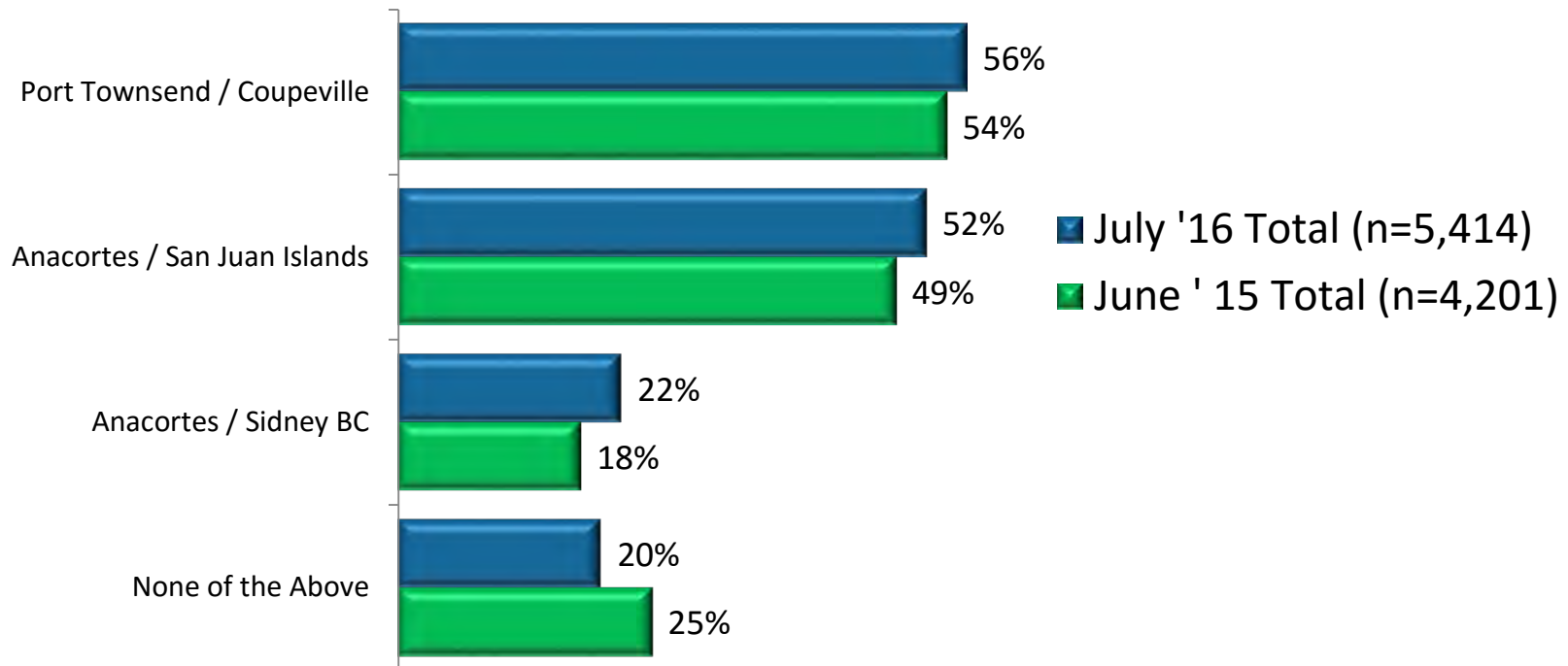
Q.7b Please tell us why it does not seem reasonable to you and how we might change it.

Current / Future Usage Of Res. Routes



Respondents were asked if they had used in the last 2 years, or are likely to use in the next 2 years, one or more of the current reservation routes. Fifty-six percent (56%) said they had or will use the Port Townsend/Coupeville route, it was followed by Anacortes/San Juan Islands (52%), and Anacortes/Sidney BC (22%). Approximately 20% of those interviewed have not and do not plan on using any of the three reservation routes.

Used In Last 2 Years or Likely To Use In Next 2 Years)

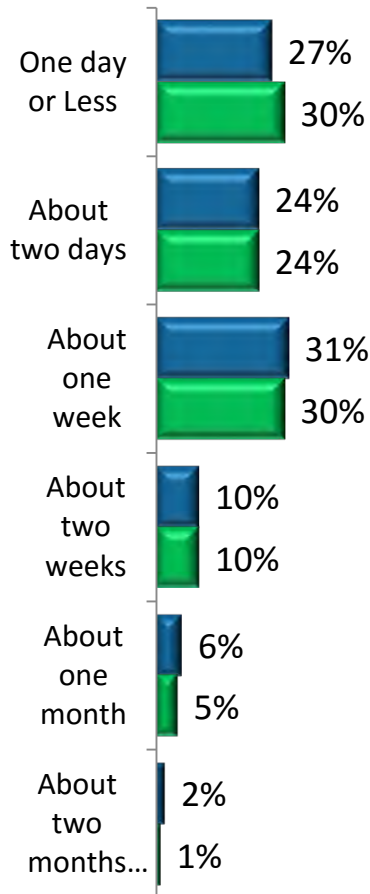


Q.8 Which of the following ferry routes, if any, have you taken in the last 2 years or are likely to take in the next 2 years? (Check all that apply)

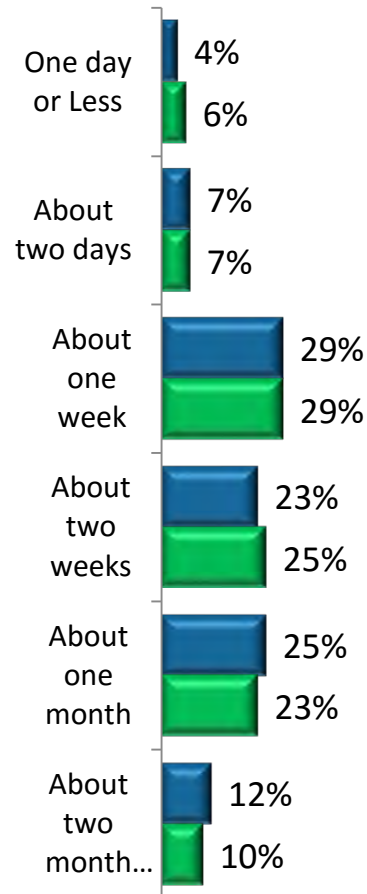
Adv. Travel Notice



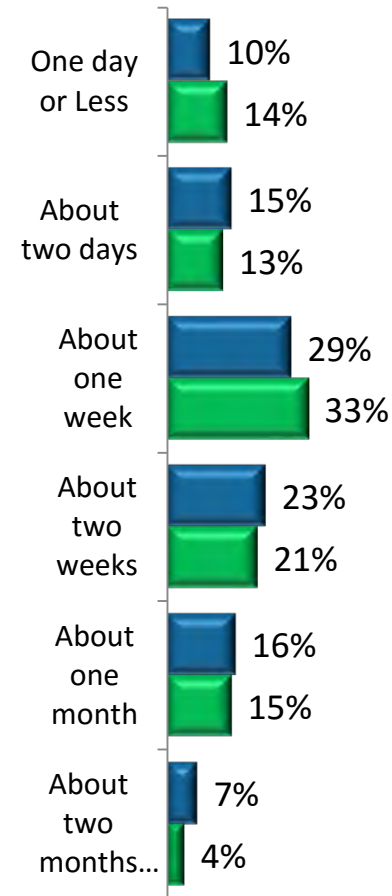
Port Townsend-Coupeville Travel



Anacortes-Sidney BC Travel



Anacortes-San Juan Islands Travel



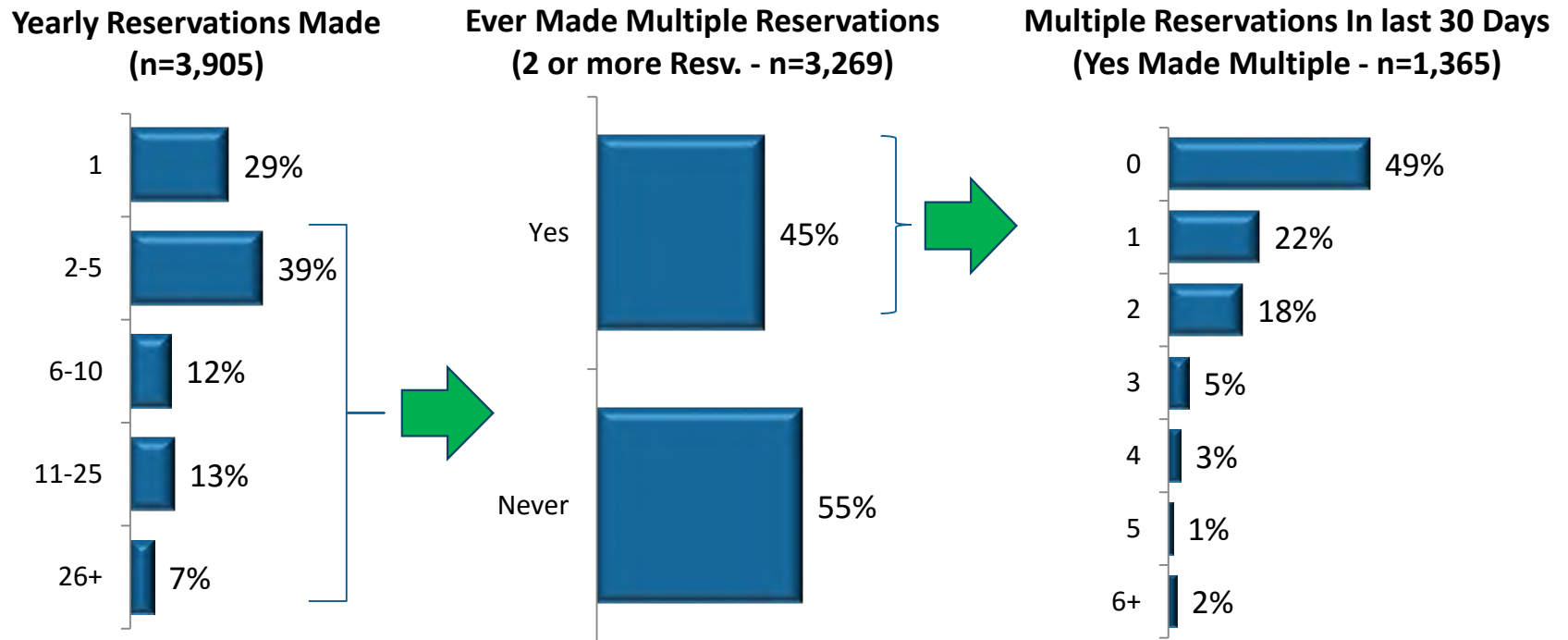
■ July '16
■ June '15

Q.9a Which statement below best describes your typical lead time before you need to take the:

Multiple Reservations - 2016



The 3,905 riders surveyed made an average of 6.9 reservations per year. The 3,269 riders who have used the WSF reservation system more than once were asked if they ever made multiple reservations for the same trip (multiple reservations on the same day) and almost half (45%) said they had. Those who have made multiple reservations for the same trip were asked how many times they did that in the last 30 days. Half (49%) reported they have not done so in the last 30 days.

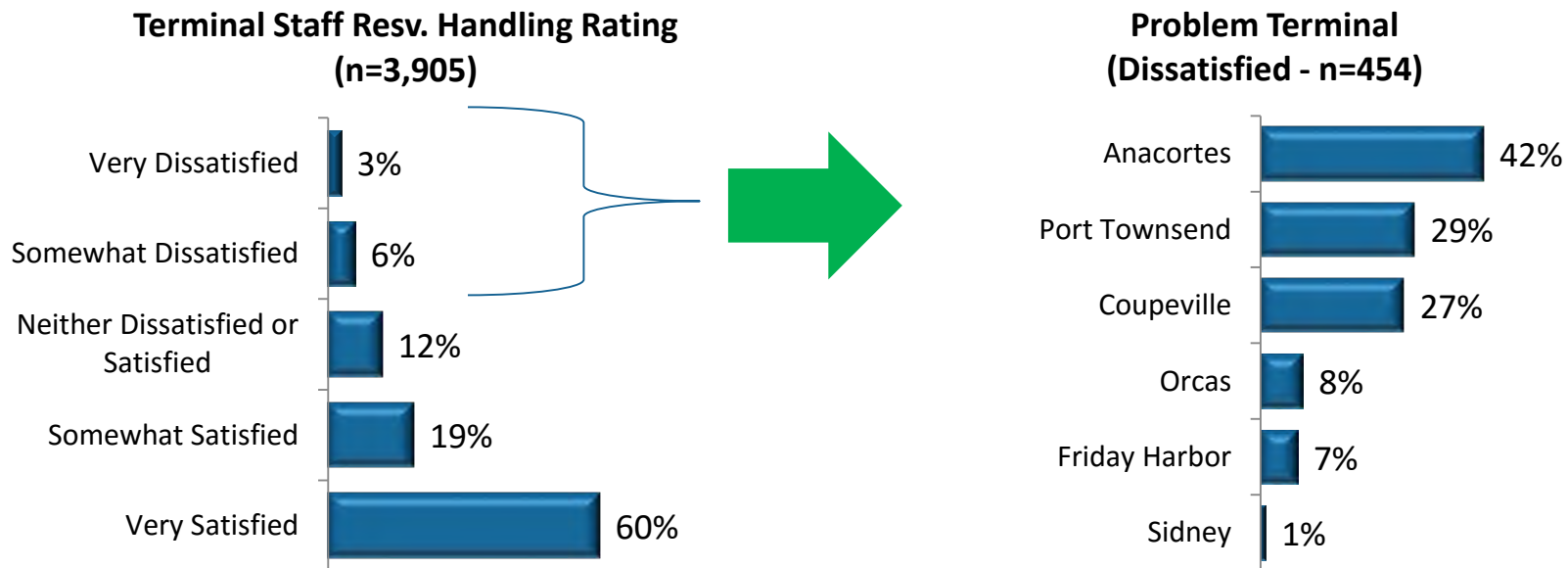


Q6 Approximately how many different reservations have you made in the last year? Q6d1 Have you ever made multiple reservations for yourself for the same trip (multiple sailings)? Q6e During the last 30 days, how many, if any, multiple reservations did you make for yourself for the same trip (multiple sailings)?

Terminal Staff Handling Of Reservation



The 3,905 riders who have used the WSF reservation system were asked to rate the customer service they received when they arrived at the terminal. Only 9% are dissatisfied with the terminal customer service with the Anacortes terminal being the most often mentioned (42%). Full time San Juan Islands residents are significantly more dissatisfied (19%) than part time residents (9%) or San Juan Islands visitors (8%). Those reporting they had a problem with their reservation (23%) are significantly more likely to say they are dissatisfied with terminal staff than those reporting no reservation problems (7%). Lopez Island residents reported more problems with terminal staff (23%) than San Juan Island (19%) or Orcas (15%) residents.

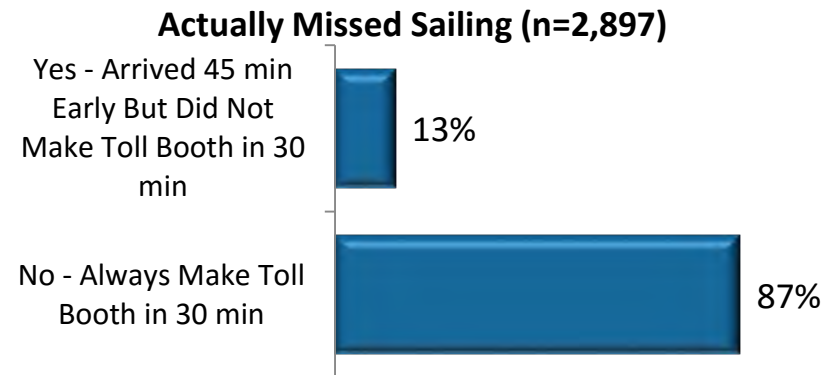
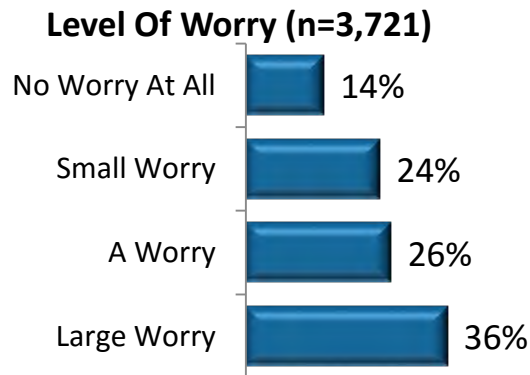


Q6f We would like to get your ratings on a couple specific aspects of the reservation process. For this question, please think of only your arrival(s) at the terminal when you have a reservation. How would you rate WSF's handling of your reservation when you arrived at the terminal? Q6f2 At which terminal(s)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

Reservation Check-in Issues



The 3,721 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were asked about their level of anxiety over not making the tollbooth in time and thus losing their reservation. One in three (36%) say it is a large worry while 62% say it is either a worry or large worry to them but only 13% actually have experience not getting to the tollbooth on time. Full time San Juan Islands residents worry (“A worry” + “Large Worry”) more so (77%) than part time San Juan Islands residents (64%) or San Juan Islands visitors (57%). Lopez Island residents (83%) worry more than San Juan (76%) or Orcas (75%) Island residents. Full time San Juan Islands residents have actually missed sailings (21%) more often than part time San Juan Islands residents (12%) or San Juan Islands visitors (9%). Actual missed sailings are about equal between residents of Lopez (22%), San Juan (21%), and Orcas (20%) Island residents.



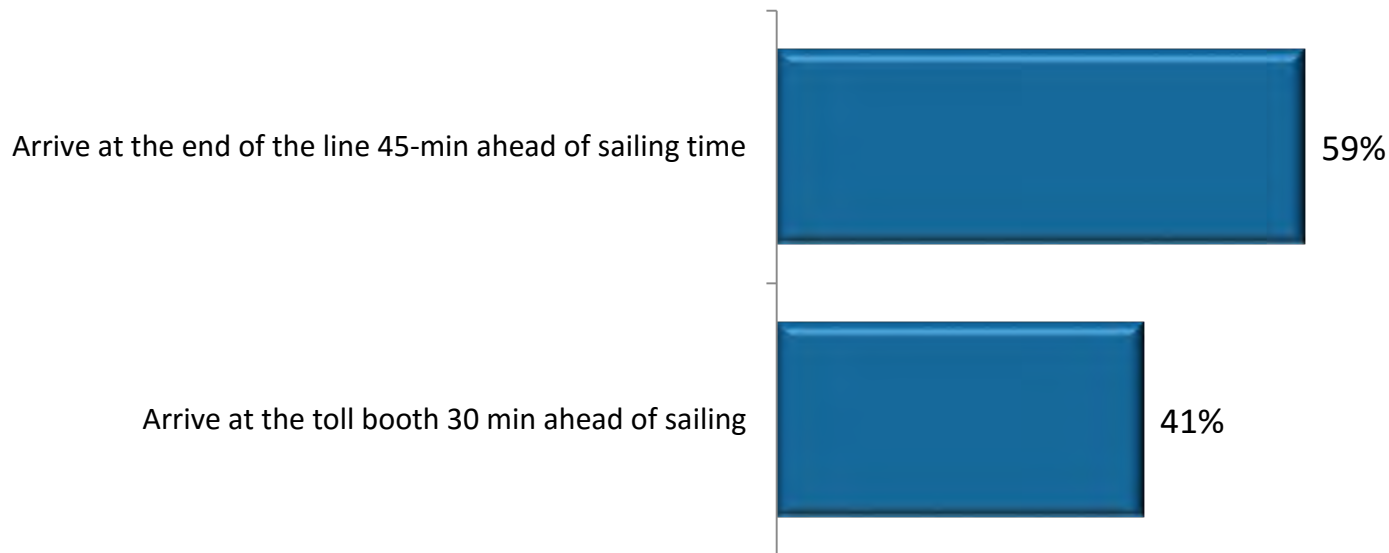
Q6g Background: At Anacortes, Friday Harbor and Orcas Island, vehicles with reservations must check in at the toll booth at least 30 minutes prior to their reserved departure time. Vehicles that do not check in at the toll booth 30 minutes ahead of the reservation time will lose their reservation and just travel standby. Drivers are encouraged to arrive at the end of the line at least 45 minutes prior to their reserved departure time so that they reach the toll booth within 30 minutes of reserved departure time. Drivers are responsible for ensuring that they reach the toll booth 30 minutes in advance of their reservation. Question: During the summer, how big a worry to you is arriving at the terminal within 45 minutes of your reserved departure time, knowing you can lose your reservation if you are late, and thus put on standby because you did not make the toll booth within 30 minutes of your reserved departure time. Q6h During 2016 have you ever arrived within 45 minutes of your reserved departure time and not made the tollbooth within 30 minutes of your reserved departure sailing?

Reservation Arrival Time



The 3,721 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were given two choices and asked to select which they felt WSF should use to determine if you have arrived within time. Six in ten (59%) said it should be based on their arrival at the end of the line 45 minutes ahead of sailing time.

Determine “On-Time” Arrival, If You ... (n=3,721)



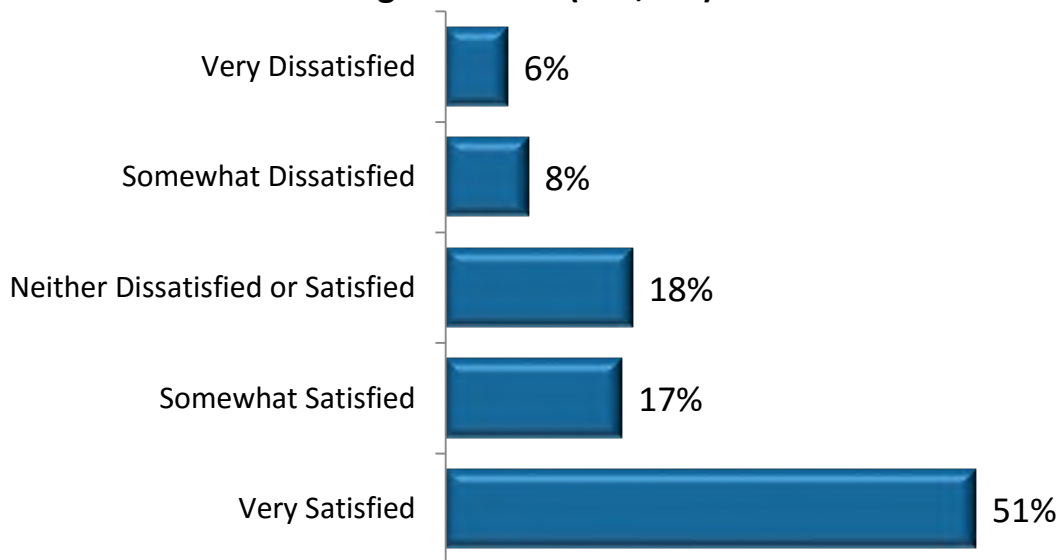
Q6j How should Washington State Ferries determine if a vehicle has arrived “on-time” for their reservation? If they ... Q6k By what method should WSF use to determine if you have arrived in line within 45-minutes ahead of your scheduled sailing?

Phone Staff Handling Fee Issues



The 1,335 riders who have used the WSF phone staff to handle reservation issues and no-show fee reversals were asked how they would rate the customer service of the phone staff. Fourteen percent (14%) are dissatisfied with how they were handled. Full time San Juan Islands residents (20%) are more likely to be dissatisfied with the phone staff handling of fee issues than part time San Juan Islands residents (12%) or San Juan Islands visitors (10%). Lopez Island residents (25%) are more likely to be dissatisfied with the phone staff than either San Juan (21%) or Orcas (17%) Island residents.

Phone Staff Handling Fee Issues (n=1,335)



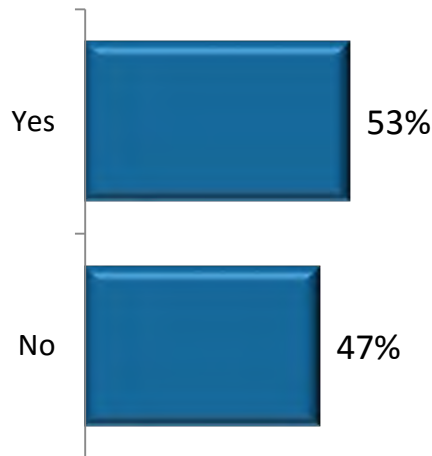
Q6m Based on your experience, if any, how would you rate WSF telephone customer service when you have called to have reservation fees or no-show fees reversed? Q6m2 What specifically was the issue or problem that you had?

No-Show Fees & Multiple Reservation

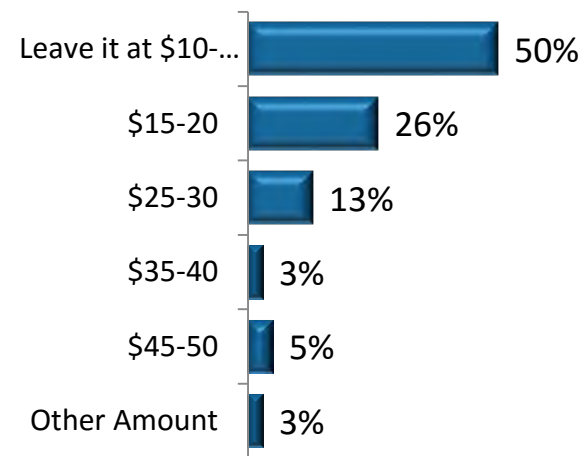


The 3,905 riders who have used the WSF reservation system were given a short background description on the impact of making multiple reservations for the same trip and asked if the no-show fees should be raised from the current \$10/8. Just over half (53%) said the no-show fees should be raised to \$23 (on average). Visitors to San Juan Islands (56%) are more likely to say increase the no-show fees than either part time San Juan Islands residents (53%) or full time San Juan Islands residents (44%). Those living on Orcas Island (50%) are more likely to want the no-show fees increased than Lopez (45%) or San Juan (40%) Island residents. The average amount based on all 3,905 respondents for the no-show fee is \$17.

Increase No-Show Fees (n=3,905)



Suggested Amount (n=3,905)



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



THANK YOU!

For More Information Contact:

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