



Prepared for:
**Washington State
Transportation Commission**



2008 Ferry Customer Survey

Technical Paper #6: General Attitudes toward Washington State Ferries

Prepared by:



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Preface

All too often, the perceptions of service quality and value of service provided by a transportation agency are driven by the comments made by those attending public meetings and/or who write directly to the agency. While these comments are an extremely important part of the public input process, they can provide a non-representative view of the actual quality of service the system provides.

Therefore, while not a primary purpose of this research, two questions were included in the on-board surveys to provide insight into riders' attitudes toward the overall quality and perceived value of service provided by WSF. This information is important because often the perception of riders' attitudes toward the system comes from public meetings and other events. These questions were also asked on WSF's 2002 Passenger Amenity and Customer Satisfaction Survey and hence provide a reliable measure of change in customer attitudes over time.

As with the other Technical Papers, each major section begins with a brief summary of the key findings. Detailed analysis then follows. All key findings are analyzed for the following key segments:

1. Season of travel (when questions were asked in both survey waves);
2. Boarding mode for sampled trip;
3. Route used for sampled trip; and
4. Day of week and time of travel for sampled trip (overall and when appropriate by boarding mode).

In addition, other analysis is included as appropriate to provide additional insight into WSF customer attitudes.

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Key Findings – Overall Attitudes toward WSF

Summary – Overall Attitudes toward WSF

Satisfaction with Riding WSF

The majority (68%) of WSF riders are satisfied with riding the ferries. While satisfaction ratings are high, it should be noted that one out of five (20%) riders are dissatisfied.

- There has been relatively little change in rider satisfaction since last measured in 2002. Overall, 74 percent of riders were satisfied with riding WSF in 2002 compared to 68 percent of all riders in 2008. This is significant in the light of changes to service as well as fare increases since that time.

Reflecting in part the nature of travel during the summer (more leisure, recreational travel), summer riders are more satisfied with riding the ferries.

- Seventy-two percent (72%) of summer riders are satisfied with riding compared to 64 percent of winter riders. Notably, a greater percentage of summer riders say they are “extremely satisfied” – 29 percent of summer riders compared with 20 percent of winter riders.
- There are no differences in winter / summer rider satisfaction among commuters – 61 percent net satisfaction for winter and 57 percent for summer commuters.

There are significant differences in riders’ satisfaction with riding WSF among the different rider groups. Differences by boarding mode, route, time of day / week travel, and frequency of traveling that are of particular note, include:

- Vehicle passengers are more satisfied with WSF than are vehicle drivers and walk-on passengers – 71 net satisfaction for vehicle passengers compared with 69 and 67 percent satisfaction for walk-on and vehicle drivers, respectively. While these differences are significant, they are relatively small.
- Riders on the Anacortes / Sidney route are by far the most satisfied riders – 79 percent net satisfaction with 35 percent of all riders saying they are “extremely satisfied.” Among the other routes, riders on the Seattle / Bainbridge route are the most satisfied overall – 75 percent net satisfaction. Other routes with above-average satisfaction ratings include: Edmonds / Kingston (72%) and Mukilteo / Clinton (71%).
- Of particular note are the relatively high levels of dissatisfaction among Point Defiance / Tahlequah and Fauntleroy / Vashon riders – 44 percent and 36 percent, respectively. This is more than twice the levels noted on all other routes, with the exception of Seattle / Bremerton.
- There is a clear relationship between rider satisfaction and the frequency with which they ride. WSF’s daily riders (those taking 45 plus one-way trips per month) are three times as likely as WSF occasional riders (those taking less than seven trips per month) to express dissatisfaction with riding – 35 percent compared to 11 percent, respectively.

Perceived Value of Service

Nearly three out of five (56%) WSF riders feel that the value of riding the ferry for the fare they pay is “good” to “very good.”

- Riders are more than two and a half times as likely to say WSF is a “good” rather than a “very good” value – 41 percent to 15 percent, respectively.
- Despite the higher fares in summer for vehicle drivers, summer riders are more likely than winter riders to say riding WSF is a good value – 59 percent compared to 52 percent, respectively. This is consistent with the higher satisfaction scores among summer riders.

Despite the fare increases over the past years, somewhat more riders today feel that WSF represents a good value than in 2002.

- In 2002, 54 percent of WSF riders rated the value of service as good. This figure increased to 56 percent in 2008.

Walk-on and vehicle passengers are significantly more likely than vehicle drivers to feel that riding WSF represents a good value.

- Sixty percent (60%) of vehicle passengers and 59 percent of walk-on passengers feel WSF is a good value compared to 53 percent of vehicle drivers.
- At the same time, vehicle drivers and walk-on passengers are more likely than vehicle passengers to rate WSF as a poor value – 16 and 13 percent compared with 11 percent, respectively.

It appears that factors other than the fare amount paid drives riders’ perceptions of value of service, analysis of perceived value of service by fare payment method shows that those paying with pre-paid, discounted fare media are more likely than those paying with a single-ride, full fare ticket to say that WSF is a poor value.

- Two out of three (66%) riders who purchase a full fare, single-ride ticket rate WSF as a good value overall.
- Only 44 percent of those paying with a multi-ride commuter card rate WSF as a good value; 20 percent rate the system as a poor value. Those paying with a multi-ride commuter card receive a 20 percent discount over the single ride ticket fare. There are no differences between vehicle drivers and walk-on passengers.
- Similarly, 49 percent of those paying with a monthly pass rate WSF as a good value; 18 percent give the system a poor value rating. Monthly passes are available only to walk-on passengers.

There is a clear relationship between the perceived value of service and rider satisfaction.

- Forty-five percent (45%) of riders who are “extremely satisfied” with riding also rate WSF as a “very good value” compared to 8 percent of those who are just “somewhat satisfied.” The majority (57%) of those who are “somewhat satisfied” rate WSF as a “good” value.
- On the other hand, 44 percent of those who are “extremely dissatisfied” with WSF also rate the system as a “very poor” value. An additional 32 percent of these riders say it is a “poor value.”

Detailed Findings – Attitudes toward WSF

Satisfaction with WSF

Respondents were asked to rate their satisfaction with Washington State Ferries on a five-point scale ranging from “1” meaning “extremely dissatisfied” to “5” meaning “extremely satisfied.” This question was also asked in WSF’s 2002 Customer Satisfaction and Amenities Survey, allowing direct comparisons with that data.

All Riders: Satisfaction with Washington State Ferries

The majority (68%) of WSF riders are satisfied with riding the ferries.

- While more riders say they are “somewhat satisfied” rather than “extremely satisfied” – 43 percent compared with 25 percent, respectively – it should be noted that “extremely satisfied” is a relatively high bar to reach.

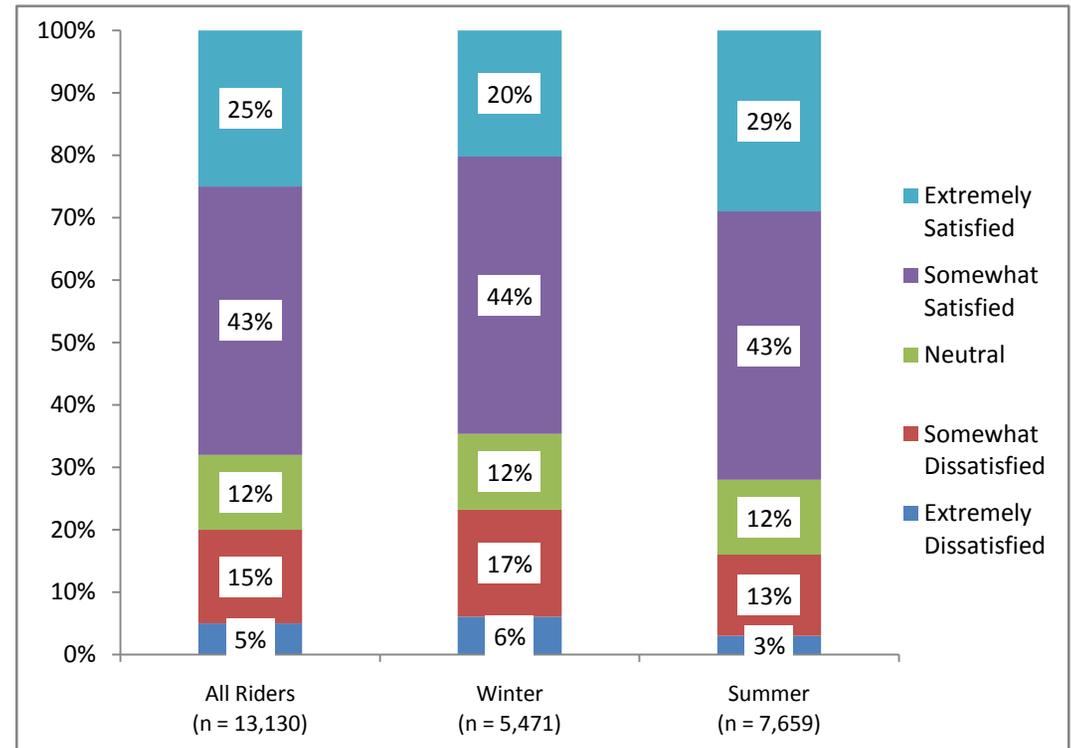
Reflecting in part the nature of travel during the summer (more leisure, recreational travel), summer riders are more satisfied with riding the ferries.

- Seventy-two percent (72%) of summer riders are satisfied with riding compared to 64 percent of winter riders. Notably, a greater percentage of summer riders say they are “extremely satisfied” – 29 percent of summer riders compared with 20 percent of winter riders.
- There are no differences in winter / summer rider satisfaction among commuters – 61 percent net satisfaction for winter and 57 percent for summer.

While satisfaction ratings are high, it should be noted that one out of five (20%) riders are dissatisfied.

- Twenty-three percent (23%) of winter riders are dissatisfied compared to 16 percent of summer riders. Additional analysis pinpoints areas where dissatisfaction is higher and identifies possibilities for service improvements.

Figure 1: Satisfaction with Washington State Ferries



Question: Overall, how satisfied are you with Washington State Ferries?

Change in Rider Satisfaction 2002 / 2008

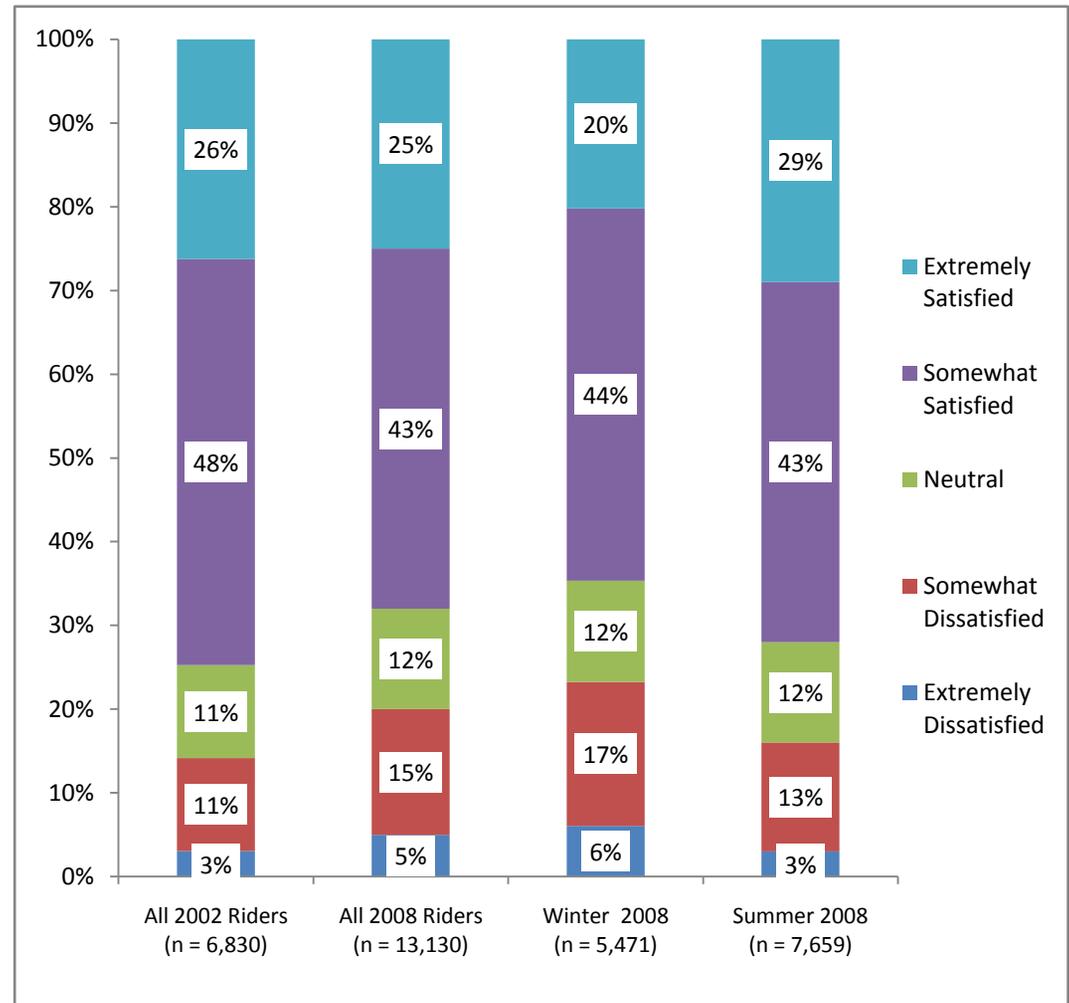
There has been relatively little change in rider satisfaction since last measured in 2002.

- Overall, 74 percent of riders were satisfied with riding WSF in 2002 compared to 68 percent of all riders in 2008. This is significant in the light of changes to service as well as fare increases since that time.

The 2002 Customer Satisfaction and Amenities Survey was conducted between August 19 and September 20, 2002. Therefore, the 2002 data collection period most closely approximates the 2008 summer data collection period.

- Comparing these two periods, 74 percent of 2002 riders were satisfied with WSF compared to 72 percent of summer 2008 riders.
- In addition, more riders in summer 2008 are “extremely satisfied” than in 2002 – 29 percent compared with 26 percent, respectively.

Figure 2: Change in Satisfaction with Riding WSF 2002 / 2008



Source for 2002 Customer Satisfaction and Amenities Survey:
http://www.wsdot.wa.gov/ferries/pdf/amenity_study.pdf

Question: Overall, how satisfied are you with Washington State Ferries?

Boarding Mode Analysis: Satisfaction with WSF

Vehicle passengers are more satisfied with WSF than are vehicle drivers and walk-on passengers. The differences while significant are relatively small.

- Seventy-one percent (71%) of vehicle passengers are satisfied compared with 67 percent of vehicle drivers and 69 percent of walk-on passengers. Of note, 28 percent of vehicle passengers are “extremely satisfied” compared with 24 percent of vehicle drivers and 25 percent of walk-on passengers.
- On the other hand 20 percent of vehicle drivers and walk-on passengers are dissatisfied compared with 16 percent of vehicle passengers.

This difference in satisfaction by boarding mode may reflect who is paying the fare – that is walk-on passengers and vehicle drivers may be more likely to be personally paying a fare while those riding on as passengers may not be paying a fare or relative to their driver the fare is minimal.

The same seasonal differences discussed earlier hold for each passenger segment. That is, summer riders in each boarding mode segment are more satisfied with riding than are winter riders in the same segment.

Table 1: Satisfaction with WSF by Boarding Mode

	All Riders (n = 13,130)	Vehicle Drivers (n = 5,241)	Vehicle Passengers (n = 2,155)	Walk-On Passengers (n = 5,734)
Net Satisfied	68%	67%	71%	69%
Extremely Satisfied	25%	24%	28%	25%
Somewhat Satisfied	43%	43%	43%	44%
Neutral	12%	12%	14%	11%
Somewhat Dissatisfied	15%	16%	13%	14%
Extremely Dissatisfied	5%	4%	3%	6%
Net Dissatisfied	20%	20%	16%	20%
Mean	3.70	3.66	3.79	3.68
<p><i>Question: Overall, how satisfied are you with Washington State Ferries?</i> <i>Mean: Based on 5-point scale where “1” means “extremely dissatisfied” and “5” means “extremely satisfied.”</i></p>				

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Route Level Analysis: Satisfaction with WSF

Analysis at the route level looks at differences in satisfaction overall by route and, where appropriate, differences between summer and winter survey periods and by boarding mode. Only those differences within route that have significant and practical implications are highlighted.

Anacortes (San Juans and Sidney)

Riders on the **Anacortes / Sidney** route are by far the most satisfied riders – 79 percent net satisfaction with 35 percent of all riders saying they are “extremely satisfied.” Eighty-four percent (84%) of Anacortes / Sidney riders are traveling for recreation. Note that the Anacortes / Sidney ferry was surveyed in the summer only; there is no service during the winter months.

Riders on the **Anacortes / San Juan** routes also have higher-than-average satisfaction – mean rating of 3.80 or a net satisfaction percentage of 71 percent. This is due primarily to below-average dissatisfaction levels and an above-average percentage of riders saying they are neither satisfied nor dissatisfied.

- Unlike many of the other routes, there are significant differences by season of travel.
- As noted earlier, vehicle passengers are more satisfied with riding than vehicle drivers and walk-on passengers. This is not the case on the Anacortes / San Juans. Here, vehicle drivers are the least satisfied (67%) when compared to vehicle passengers (80%) and, to a lesser extent, walk-on passengers (70%).
- Satisfaction ratings on the San Juans are highly influenced by recreational travelers and those traveling to visit friends and family are more satisfied than the more regular riders. Seventy-eight percent (78%) of recreational travelers and 67 percent of those traveling to visit friends and family are satisfied compared with 50 percent of commuters and 62 percent of those traveling for personal business and/or shopping.

Port Townsend / Keystone

Compared to the other routes carrying a large number of recreational travelers, satisfaction with WSF among **Port Townsend / Keystone** riders is the same as WSF riders generally – 69 percent net satisfied.

- Summer riders on this route are more satisfied than winter riders – 73 percent compared with 63 percent, respectively. Notably, significantly more summer riders say they are “extremely satisfied” – 32 percent “extremely satisfied” for summer riders compared with 21 percent for winter riders. The timing of the winter survey periods (March 2008) occurred relatively soon after the Steel Electrics were unexpectedly retired from service. The lower satisfaction in winter most likely reflects some of the service disruptions riders on this route experienced as WSF adapted to this event. Therefore, the summer satisfaction levels may be a more accurate reflection of customer satisfaction on this route.

Seattle / Bainbridge, Edmonds / Kingston, and Mukilteo / Clinton

Among the other routes, riders on the Seattle / Bainbridge are the most satisfied overall – 75 percent net satisfied. Other routes with above-average satisfaction ratings include: Edmonds / Kingston (72%) and Mukilteo / Clinton (71%).

- On all of these routes, satisfaction is higher during the summer months. Edmonds / Kingston has the greatest increase in the percentage of satisfied riders during the summer months – 74 percent of summer riders are satisfied compared to 68 percent of winter riders. This is due primarily to the significant increase in the percentage of summer riders saying they are “extremely satisfied” – 31 percent for summer riders compared to 23 percent for winter riders.

Point Defiance / Tahlequah and Fautleroy / Vashon

Of particular note are the relatively high levels of dissatisfaction among *Point Defiance / Tahlequah* and *Fautleroy / Vashon* riders – 44 percent and 36 percent, respectively. This is more than twice the levels noted on all other routes, with the exception of Seattle / Bremerton.

- There is a significant difference in rider satisfaction between *Fautleroy / Vashon* winter and summer riders – 56 percent satisfaction among summer riders compared to 39 percent among winter riders. The Fautleroy / Vashon route experiences a significant increase in recreational travel in the summer months.
- Regular riders on the *Fautleroy / Vashon* route are the potential root cause of the lower satisfaction ratings. Half (51%) of Fautleroy / Vashon riders who take more than 45 one-way trips per month and 46 percent of those taking between 25 and 44 one-way trips are dissatisfied. On the other hand, only 14 percent of those taking fewer than seven one-way trips are dissatisfied.
- There are no significant differences in rider satisfaction between *Point Defiance / Tahlequah* winter and summer riders. While there is some increase in rider satisfaction on this route between periods – 37 percent satisfaction among winter riders compared to 48 percent among summer riders – this difference is not statistically significant.

Seattle / Bremerton

Riders on the *Seattle / Bremerton* route also express a lower-than-average level of rider satisfaction – 63 percent satisfied.

- Like Fautleroy / Vashon, the Seattle / Bremerton route experiences a significant customer satisfaction boost among summer riders – 56 percent satisfaction among winter riders compared to 68 percent for summer riders. The Seattle / Bremerton route also experiences an increase in the percentage of riders traveling for recreational purposes, notably those taking day trips (77%). Like Fautleroy / Vashon, this suggests that Seattle / Bremerton regular riders are the potential root cause of the lower satisfaction ratings. Forty-one percent (41%) of Seattle / Bremerton’s most frequent riders (those taking 45 or more one-way trips) and 42 percent of those taking 25 to 44 one-way trips monthly are dissatisfied.
- Unlike other routes, Seattle / Bremerton vehicle drivers and passengers are more satisfied than are walk-on passengers – 68 and 67 percent net satisfaction respectively for vehicle drivers and passengers compared to 60 percent net satisfaction for walk-on passengers. The Seattle / Bremerton route has the highest rate of walk-on passengers (63%). This lower satisfaction among this segment may reflect the lower frequency of service, longer travel times, and the loss of the passenger only service that once served this route.

Table 2: Satisfaction with WSF by Route

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
Net Satisfied	68%	75%	63%	72%	71%	49%	66%	43%	69%	71%	79%
Extremely Satisfied	25%	29%	19%	28%	27%	15%	20%	13%	28%	25%	35%
Somewhat Satisfied	43%	46%	44%	44%	44%	34%	46%	30%	41%	46%	44%
Neutral	12%	9%	13%	13%	13%	14%	13%	12%	11%	15%	7%
Somewhat Dissatisfied	15%	13%	17%	12%	12%	26%	17%	33%	14%	11%	12%
Extremely Dissatisfied	5%	3%	7%	4%	3%	10%	5%	11%	5%	2%	2%
Net Dissatisfied	20%	16%	24%	16%	15%	36%	22%	44%	19%	13%	14%
Mean	3.70	3.86	3.52	3.80	3.79	3.17	3.59	3.01	3.73	3.80	3.99

Question: Overall, how satisfied are you with Washington State Ferries?

Mean: Based on 5-point scale where "1" means "extremely dissatisfied" and "5" means "extremely satisfied."

Time of Day / Week Travel Analysis: Satisfaction with WSF

Those traveling off-peak weekdays and on weekends are significantly more satisfied with WSF than are peak weekday riders. Peak weekday riders represent WSF's most frequent riders – **48 percent take 25 or more one-way rides per month.**

- Seventy-two percent (72%) of weekend and 71 percent off-peak weekday and riders are satisfied compared with 62 percent of peak weekday riders. Of note, 30 percent of off-peak weekday and 28 percent of weekend riders are “extremely satisfied” compared with 18 percent of peak weekday riders.
- On the other hand, one out of four (25%) peak weekday riders are dissatisfied.

The same seasonal differences discussed earlier hold for all segments. That is, summer riders in each time of / day week travel segment are more satisfied with riding than are winter riders in the same segment.

Looking only at peak weekday riders, there are significant differences between the three boarding mode segments. Specifically both vehicle drivers and walk-on passengers are less satisfied than vehicle passengers. More than one-third (36%) of peak weekday passengers drive onto the ferry and 46 percent walk on. Only 17 percent are vehicle passengers.

- Sixty-eight percent (68%) of peak weekday vehicle passengers are satisfied; only 17 percent are dissatisfied.
- Sixty-one percent (61%) of peak weekday walk-on passengers and 61 percent of vehicle drivers are satisfied. On the other hand, 28 percent of peak weekday walk-on passengers and 26 percent of vehicle drivers are dissatisfied.

Table 3: Satisfaction with WSF by Time of Day / Week Travel

	All Riders (n = 13,130)	Peak Weekday (n = 6,192)	Off-Peak Weekday (n = 3,278)	Weekend (n = 3,660)
Net Satisfied	68%	62%	71%	72%
Extremely Satisfied	25%	18%	29%	28%
Somewhat Satisfied	43%	44%	42%	44%
Neutral	12%	12%	12%	13%
Somewhat Dissatisfied	15%	19%	13%	12%
Extremely Dissatisfied	5%	6%	4%	3%
Net Dissatisfied	20%	25%	17%	15%
Mean	3.70	3.49	3.79	3.81

*Question: Overall, how satisfied are you with Washington State Ferries?
Mean: Based on 5-point scale where “1” means “extremely dissatisfied” and “5” means “extremely satisfied.”*

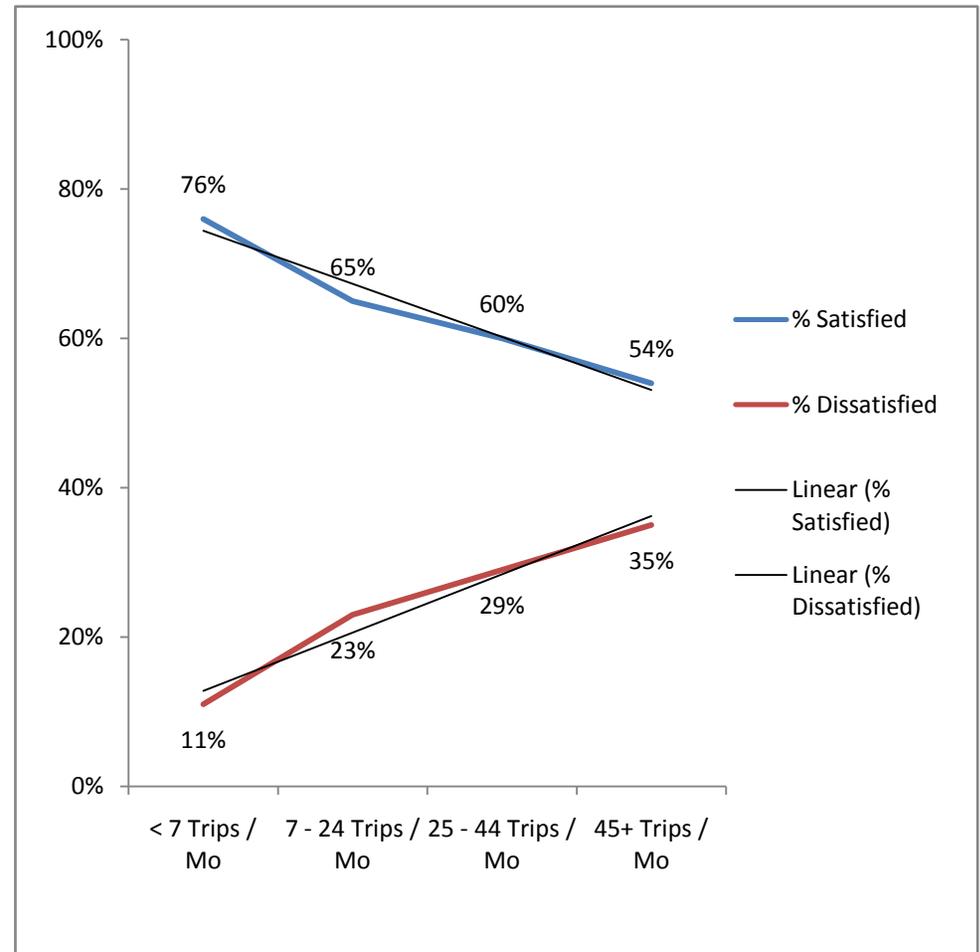
Other Significant Findings: Satisfaction with WSF by Frequency of Riding

There is a clear relationship between rider satisfaction and the frequency with which they ride.

WSF's daily riders (those taking 45 plus one-way trips per month) and those taking between 25 and 44 one-way trips monthly are three times as likely as WSF occasional riders (those taking less than seven trips per month) to express dissatisfaction with riding.

- Frequent and regular riders on the Fauntleroy / Vashon route are the least satisfied – 35 percent of those taking 45 or more trips monthly are dissatisfied; 29 percent of those taking 25 to 44 trips monthly are dissatisfied.
- On the other hand, only 11 percent of those taking fewer than seven one-way trips are dissatisfied.

Table 4: Satisfaction with WSF by Frequency of Riding



Question: Overall, how satisfied are you with Washington State Ferries?

Base: All Respondents (n = 13,130)

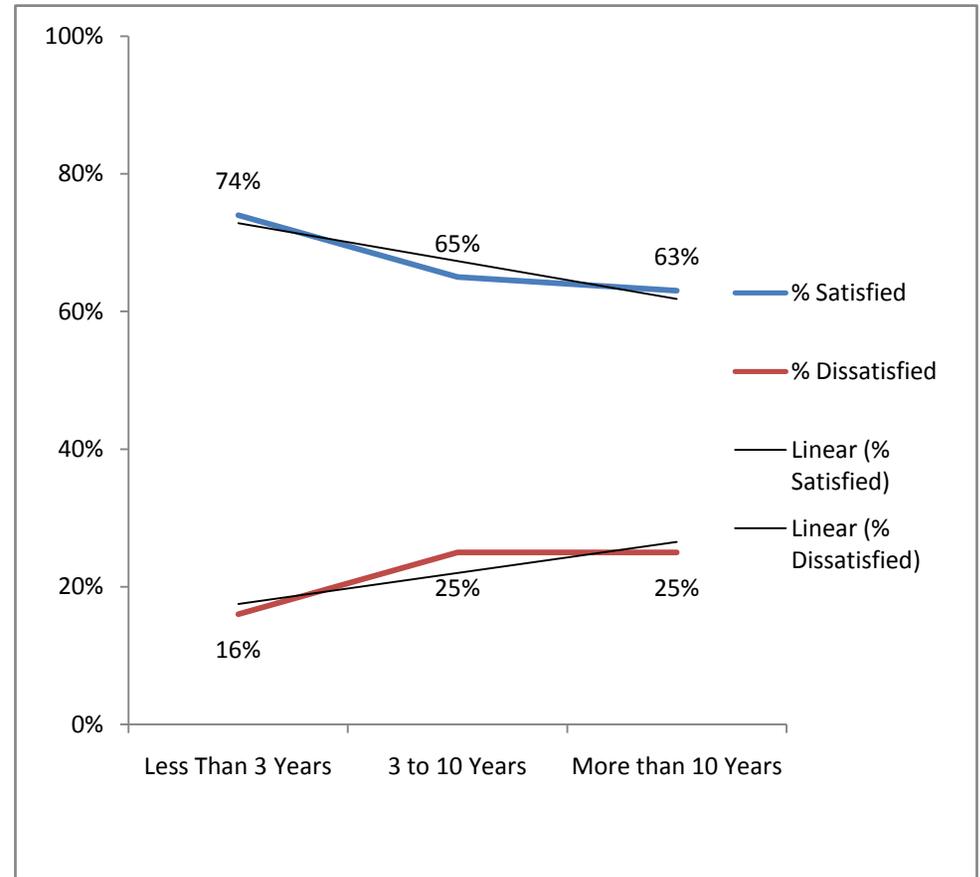
Other Significant Findings: Satisfaction with WSF by Number of Years Riding

In the March On-Board Surveys, respondents were asked how many years they have been riding the ferries. This analysis, therefore, represents the views of winter riders only.

Winter riders that are relatively new to the system (i.e., riding less than 3 years) are more satisfied with WSF than are the more tenured winter riders.

- Three out of four (74%) winter riders who have been riding less than three years are satisfied with riding WSF compared with 65 percent of those riding between three and ten years and 63 percent of those riding more than ten years. It is noteworthy that the percentage of winter riders who are “extremely satisfied” decreases significantly as tenure increases.
- Twenty-five percent (25%) of winter riders who have been riding less than three years are “extremely satisfied” compared with 19 percent of those riding between three and ten years and 17 percent of those riding more than ten years.

Table 5: Satisfaction with WSF by Number of Years Riding (Winter Riders Only)



Question: Overall, how satisfied are you with Washington State Ferries?

Base: Winter Respondents (n = 5,471)

Perceptions of Value of Service

Respondents were asked, based on their personal experience, to rate the value of riding Washington State Ferries. “Value” was defined as what you receive for the amount you pay. Ratings were given on a five-point scale ranging from “1” meaning “a very poor value” to “5” meaning “a very good value.” This question was also asked in WSF’s 2002 Customer Satisfaction and Amenities Survey, allowing direct comparisons with that data.

All Riders: Perceived Value of Service

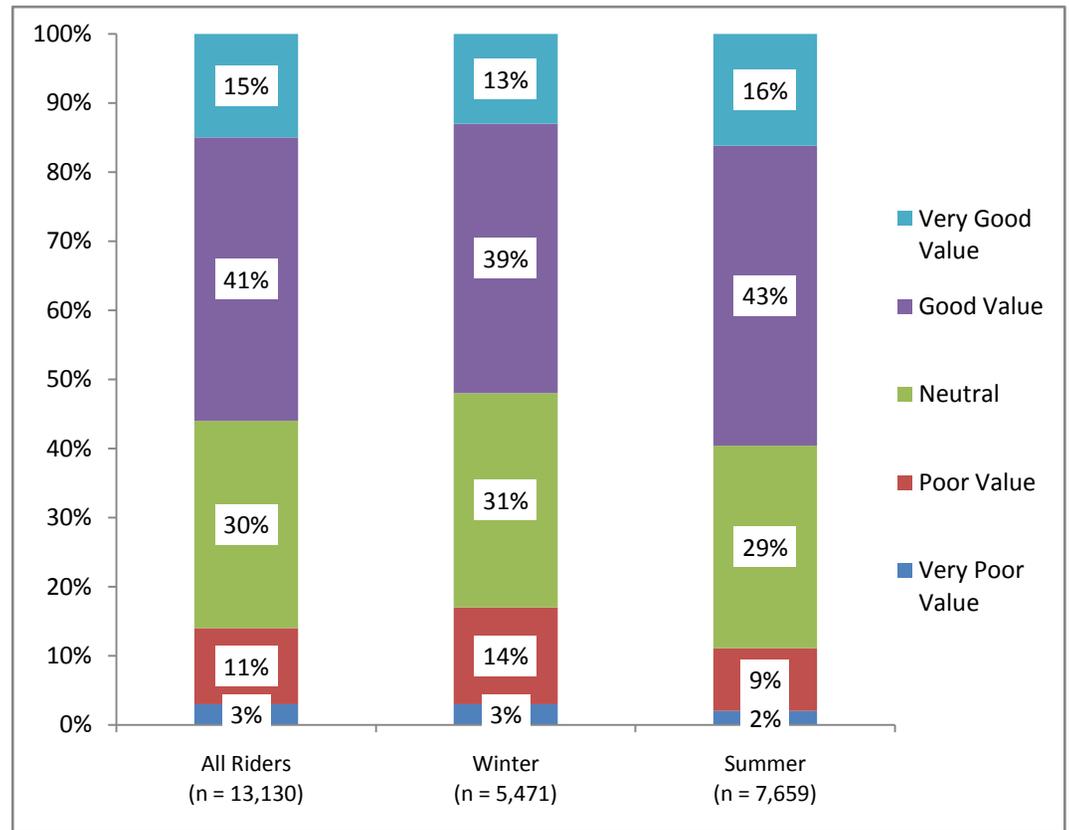
Nearly three out of five (56%) WSF riders feel that the value of riding the ferry for the fare they pay is good.

- Riders are more than two and a half times as likely to say WSF is a “good” rather than “a very good” value – 41 percent compared to 15 percent, respectively.

Despite the higher fares in summer for some passenger segments, summer riders are more likely than winter riders to say riding WSF is a good value – 59 percent compared to 52 percent, respectively.

- This is consistent with the higher satisfaction scores among summer riders – 72 percent net satisfaction for summer riders compared to 64 percent for winter riders.

Figure 3: Perceived Value of Service



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

Change in Perceived Value of Service 2002 / 2008

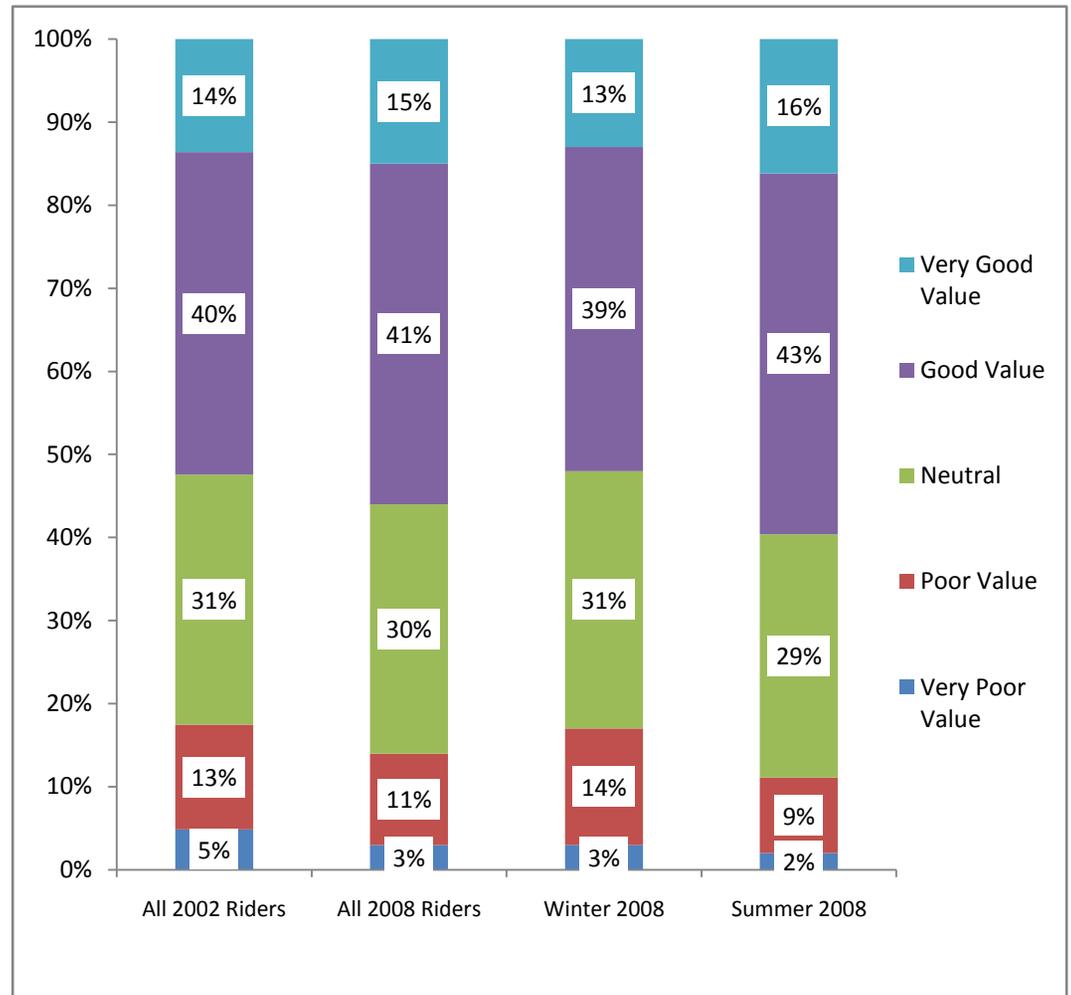
Despite the fare increases over the past years, more riders today feel that WSF represents a good value than in 2002.

- In 2002, 54 percent of WSF riders rated the value of service as good. This figure increased to 56 percent in 2008.

As noted in the discussion on rider satisfaction, the 2002 Customer Satisfaction and Amenities Survey was conducted between August 19 and September 20, 2002. Therefore, the 2002 data collection period most closely approximates the 2008 summer data collection period.

- Comparing these two periods, the change in perceived value is even greater. Fifty-nine percent (59%) of 2008 summer riders say that WSF is a good value compared to 54 percent of 2002 riders.

Figure 4: Change in Perceived Value of Service 2002 / 2008



Source for 2002 Customer Satisfaction and Amenities Survey:
http://www.wsdot.wa.gov/ferries/pdf/amenity_study.pdf

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

Boarding Mode Analysis: Perceived Value of Service

Walk-on and vehicle passengers are significantly more likely than vehicle drivers to feel that riding WSF represents a good value. There are significant differences within each boarding mode by travel season.

- **Walk-on Passengers:** Nearly three out of five (59%) of all walk-on passengers say that WSF is a good value. Among summer riders, this figure is 63 percent compared to 53 percent for winter riders.
- **Vehicle Passengers:** Three out of five (60%) vehicle passengers rate WSF as a good value. Like walk-on passengers, this figure is higher for summer (62%) than winter (56%) riders.
- **Vehicle Drivers:** Overall, 53 percent of vehicle drivers rate WSF as a good value. Reflecting the impact of the summer surcharges on vehicle drivers, there is less of a difference in vehicle driver attitudes between winter (51%) and summer (55%) drivers as compared to walk-on and vehicle passengers.

At the same time, vehicle drivers and walk-on passengers are more likely than vehicle passengers to rate WSF as a poor value.

- **Vehicle Drivers:** Sixteen percent (16%) of vehicle drivers rate WSF as a poor value. Despite the summer surcharges, winter drivers rate WSF lower than do summer drivers – 19 percent compared to 12 percent.
- **Walk-on Passengers:** Thirteen percent (13%) of walk-on passengers rate WSF as a poor value. Like vehicle drivers, more winter walk-on passengers rate the ferries lower than summer walk-on passengers – 12 percent compared to 16 percent.
- **Vehicle Passengers:** Only 11 percent of vehicle passengers rate WSF as a poor value. Again, however, a greater percentage of winter riders (14%) than summer riders (9%) say it is a poor value.

These somewhat surprising differences would suggest that factors other than cost of fares affect winter riders' perceptions of value.

Table 6: Perceived Value of Service by Boarding Mode

	All Riders (n = 13,130)	Vehicle Drivers (n = 5,241)	Vehicle Passengers (n = 2,155)	Walk-On Passengers (n = 5,734)
Net Good Value	56%	53%	60%	59%
Very Good Value	15%	13%	16%	17%
Good Value	41%	40%	44%	42%
Neutral	30%	32%	29%	28%
Somewhat Poor Value	11%	13%	9%	10%
Very Poor Value	3%	3%	2%	3%
Net Poor Value	14%	16%	11%	13%
Mean	3.55	3.49	3.63	3.59
<p><i>Question: Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries?</i></p> <p><i>Mean: Based on 5-point scale where "1" means "very poor value" and "5" means "very good value."</i></p>				

Route Level Analysis: Perceived Value of Service

Analysis at the route level looks at differences in satisfaction overall by route and, where appropriate, differences between summer and winter survey periods and by boarding mode. Only those differences within route that have significant and practical implications are highlighted.

Differences in ratings for perceived value of service follow similar patterns as those noted for rider satisfaction.

Anacortes (San Juans and Sidney)

Riders on the **Anacortes / Sidney** route give the highest ratings for value of service – 76 percent net good with 28 percent of all riders saying it is a “very good value.”

Riders on the **Anacortes / San Juan** route give WSF a somewhat higher than average value – mean rating of 3.66 compared to 3.55 overall. This is due primarily to relatively few (9%) rating this route as a poor value and a relatively high percentage (32%) giving a neutral rating.

- As with rider satisfaction, there are significant differences by season of travel.
- There are no differences in ratings for value of service between riders on this route boarding as drivers, vehicle, or walk-on passengers.

Port Townsend / Keystone

Riders on the **Port Townsend / Keystone** also give above-average ratings for value of service – 71 percent rates WSF as a good value. This is different than the customer satisfaction ratings where riders gave the route the same ratings as WSF riders generally.

- There are no differences in perceived value by season or boarding mode.

Fauntleroy / Vashon and Point Defiance / Tahlequah

Consistent with the lower customer satisfaction scores, a significant number of riders on the **Fauntleroy / Vashon and Point Defiance / Tahlequah** rate WSF as a poor value – 30 percent and 29 percent, respectively. This is more than twice the levels noted on all other routes, with the exception of Seattle / Bremerton.

- There is a significant difference in perceived value of service between Fauntleroy / Vashon riders winter and summer riders – 40 percent of summer riders gives a good to very good value rating compared to 28 percent of winter riders. On the other hand, during the winter these figures are flipped – 39 percent of winter riders gives the system a poor value rating compared to 23 percent among summer riders.
- There are no significant differences in perceived value of service between Point Defiance / Tahlequah winter and summer riders.

Seattle / Bremerton

Finally, riders on the **Seattle / Bremerton** route also give WSF a lower-than-average value rating overall – 56 percent good value. Moreover, an above-average number (15%) rate the system as a poor value.

- These lower ratings are due primarily to the significant lower ratings for value given by winter riders. Twice as many winter riders as summer riders say that WSF is a poor value – 20 percent compared to 11 percent, respectively.

Table 7: Perceived Value of Service by Route

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
Net Good Value	56%	60%	56%	57%	61%	35%	57%	35%	71%	59%	76%
Very Good Value	15%	17%	15%	14%	18%	5%	13%	6%	24%	16%	28%
Good Value	41%	43%	41%	43%	43%	30%	44%	29%	47%	43%	48%
Neutral	30%	29%	29%	30%	28%	35%	29%	37%	21%	32%	20%
Poor Value	11%	10%	11%	11%	9%	23%	11%	20%	5%	8%	4%
Very Poor Value	3%	1%	4%	2%	2%	7%	2%	9%	3%	1%	0%
Net Poor Value	14%	11%	15%	13%	11%	30%	13%	29%	8%	9%	4%
Mean	3.55	3.65	3.51	3.56	3.66	3.02	3.56	3.03	3.86	3.66	4.00

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

Mean: Based on 5-point scale where "1" means "very poor value" and "5" means "very good value."

Time of Day / Week Travel Analysis: Perceived Value of WSF

As with the customer satisfaction results, peak weekday riders rate WSF lower for value of service than do off-peak weekday and weekend riders.

- While approximately three out of five off-peak weekday (58%) and 61 percent of weekend riders rate WSF as a good value, this is true for just over half (51%) of peak weekday riders. At the same time 17 percent of peak weekday riders say that riding WSF is a poor value.
- Peak weekday riders represent WSF's most frequent riders (18 percent take 45 or more one-way trips / month and 30 percent take 25 to 44 one-way trips). Moreover, they are most likely to be paying with pre-paid, discounted fare media (39 percent use a multi-ride commuter card and 23 percent use a monthly pass). Therefore, the lower ratings given for value of service given by peak weekday riders suggests that cost of fares is not the primary factor driving riders' perceptions of value of service.

Table 8: Perceived Value of WSF by Time of Day / Week Travel

	All Riders (n = 13,130)	Peak Weekday (n = 6,192)	Off-Peak Weekday (n = 3,278)	Weekend (n = 3,660)
Net Good Value	56%	51%	58%	61%
Very Good Value	15%	12%	16%	17%
Good Value	41%	39%	42%	44%
Neutral	30%	33%	29%	28%
Somewhat Poor Value	11%	13%	11%	9%
Poor Value	3%	4%	2%	2%
Net Poor Value	14%	17%	13%	11%
Mean	3.55	3.42	3.59	3.66

Question: Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries?
 Mean: Based on 5-point scale where "1" means "very poor value" and "5" means "very good value."

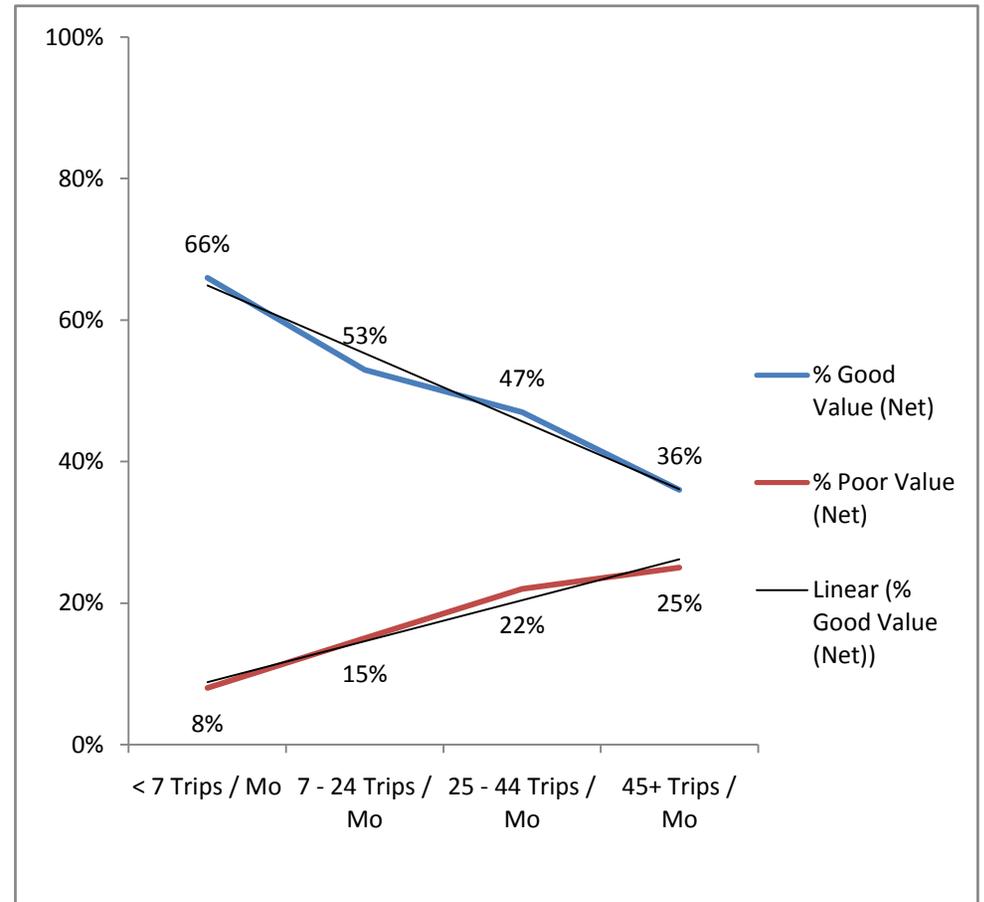
Other Significant Findings: Perceived Value of Service by Frequency of Riding

As with customer satisfaction, there is a clear relationship between riders' perceived value of service and the frequency with which they ride.

WSF's daily riders (those taking 45 plus one-way trips per month) are three times as likely as WSF occasional riders (those taking seven trips per month) to say riding WSF is a poor value. Yet, 85 percent of WSF daily riders pay with a commuter card or monthly pass and receive a discount in fares of 20 percent or greater.

- Frequent and regular riders on the Fauntleroy / Vashon route are the most negative – 42 percent of those taking 45 or more trips monthly say WSF is a poor value; 31 percent of those taking 25 to 44 trips monthly also say it is a poor value.
- A significant number of frequent riders on the Edmonds / Kingston route also rate WSF as a poor value – 32 percent of those taking 45 or more trips monthly say WSF is a poor value.

Table 9: Perceived Value of Service by Frequency of Riding



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

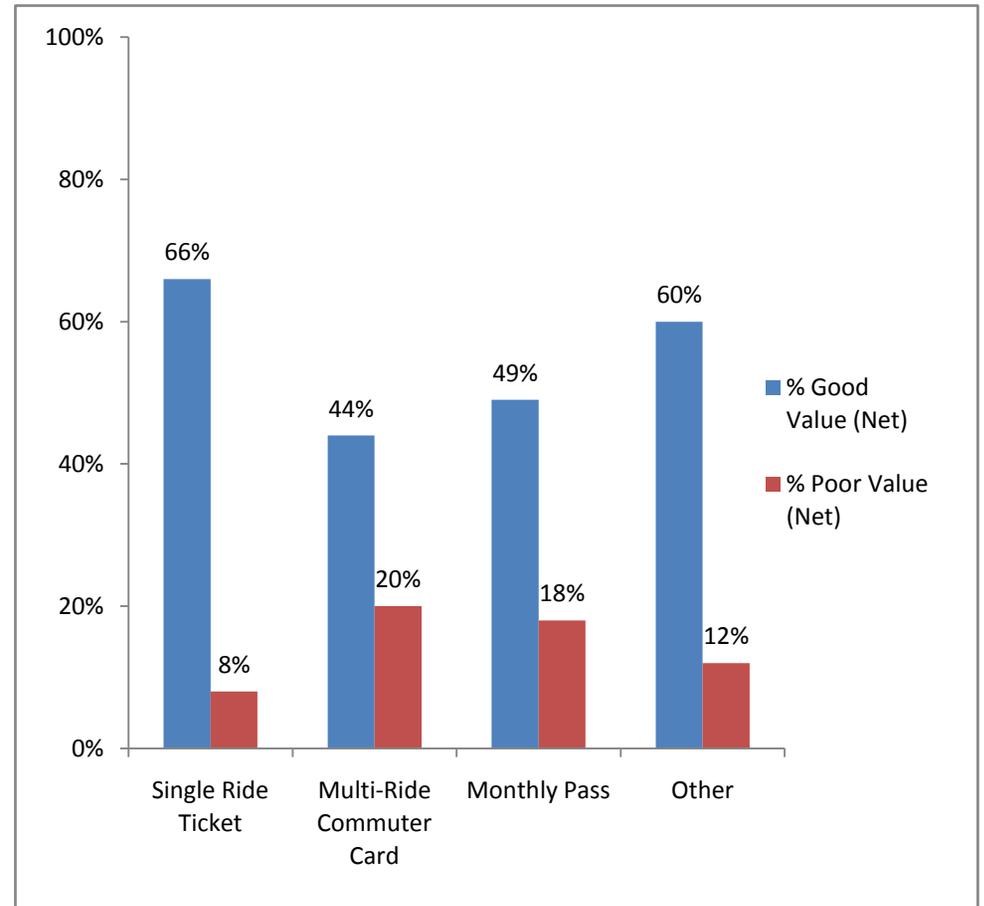
Base: All Respondents (n = 13,130)

Other Significant Findings: Perceived Value of Service by Fare Payment Method

To support the earlier statement that factors other than fare amount paid drives riders' perceptions of value of service, analysis of perceived value of service by fare payment method shows that those paying with pre-paid, discounted fare media are more likely than those paying with a single ride, full fare ticket to say that WSF is a poor value.

- Two out of three (66%) riders who purchase a full-fare, single ride ticket rate WSF as a good value overall.
- Only 44 percent of those paying with a multi-ride commuter card rate WSF as a good value; 20 percent rate the system as a poor value. Those paying with a multi-ride commuter card receive a 20 percent discount over the single ride ticket fare. There are no differences between vehicle drivers and walk-on passengers.
- Similarly, 49 percent of those paying with a monthly pass rate WSF as a good value; 18 percent give the system a poor value rating. Monthly passes are available only to walk-on passengers.

Table 10: Perceived Value of Service by Fare Payment Method



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

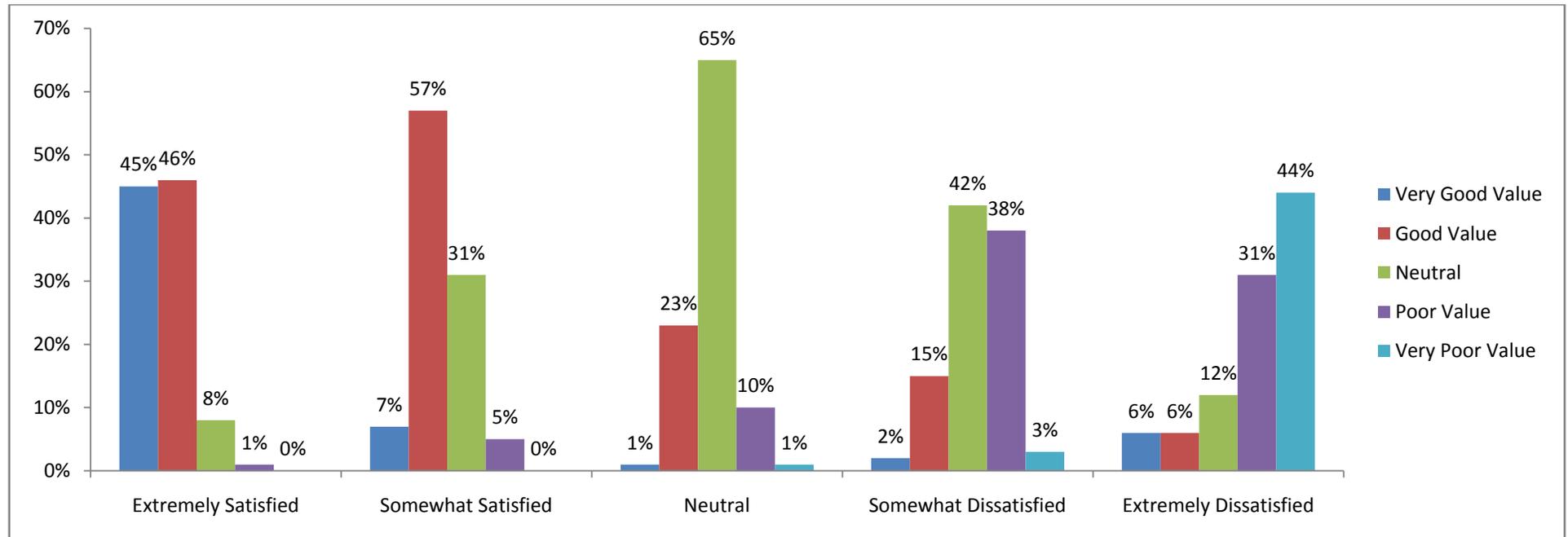
Base: All Respondents (n = 13,130)

Other Significant Findings: Relationship between Perceived Value of Service and Rider Satisfaction

There is a clear relationship between the perceived value of service and rider satisfaction.

- Forty-five percent (45%) of riders who are “extremely satisfied” with riding also rate WSF as a “very good value” compared to 7 percent of those who are just “somewhat satisfied.” The majority (57%) of those who are “somewhat satisfied” rate WSF as a “good” value.
- On the other hand, 44 percent of those who are “extremely dissatisfied” with WSF also rate the system as a “very poor” value. An additional 31 percent of these riders say it is a “poor value.”

Figure 5: Relationship between Perceived Value of Service and Rider Satisfaction



Question: Overall, how satisfied are you with Washington State Ferries?

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

Base: All Respondents

Appendix

On-Board Survey Background / Objectives & Methodology

Background / Objectives

While Washington State Ferries (WSF) has routinely conducted Origin & Destination Surveys (1993, 1999, and 2006) as well as a Customer Survey on Amenities and Customer Satisfaction (2002), this research represents the first comprehensive survey of WSF customers – both their travel behaviors and attitudes. The key objectives for this on-board survey effort were in large part driven by the legislation that required this research and were further refined as follows:

- Develop and implement a quantitative research methodology that yields reliable and statistically valid baseline results. The legislation calls for an ongoing biennial survey effort. As such, the research needed to be designed with the following sub-objectives in mind:
 - The methodology must be replicable in future years.
 - The methodology must provide reliable data at an aggregate level and allow for reliable analysis among key customer segments, notably at the route level and by different types of passengers (boarding mode, trip purpose, frequency of travel, etc.).
- Provide a comprehensive demographic and travel behavior profile of WSF customers.
- Test customer attitudes toward possible changes in fare policies and/or operations.

Methodology

Sampling

The overall objective in designing the sample plan was to obtain a representative sample of all ferry customers on all routes operated by WSF. The most effective and efficient means to accomplish this objective is through the use of a cluster sample. Cluster sampling is a technique used when "natural" groupings are evident in a statistical population – in this case a ferry trip. In this technique, the total population (all ferry customers), is divided into these groups (or clusters) and a sample of the trips is selected randomly. The survey is then administered to all riders on each selected trip.

The sample was stratified by route and the number of trips selected for each route was set to achieve a final number of surveys that is roughly proportionate to ridership on that route. The sample was further stratified by time of day. Since the focus of the study is on peak travel behavior and because the majority of ferry customers travels during peak travel periods, stratification will result in a roughly proportionate sample of peak and off-peak travelers (relative to their actual percent of the population). Sampling is at a rate of 75 percent peak / 25 percent off-peak trips, as illustrated in the following table.

Table 11: Number of Sampled Trips

Route	Total Number of Yoked Trips Sampled	# of Peak Weekday	# of Peak Weekend	# of Off-Peak (Weekday & Weekend)
March 2008				
Seattle / Bainbridge	18	10	3	5
Seattle / Bremerton	6	4	1	1
Edmonds / Kingston	16	10	3	3
Mukilteo / Clinton	15	9	3	3
Fauntleroy / Vashon / Southworth	13	8	1	4
Point Defiance / Tahlequah	4	2	1	1
Keystone / Port Townsend	3	2	1	0
Anacortes / San Juans	2	1	1	0
Total	77	46	14	17
July / August 2008				
Seattle / Bainbridge	18	10	3	5
Seattle / Bremerton	6	4	1	1
Edmonds / Kingston	16	10	3	3
Mukilteo / Clinton	15	9	3	3
Fauntleroy / Vashon / Southworth	13	8	1	4
Point Defiance / Tahlequah	4	2	1	1
Keystone / Port Townsend	4	2	2	0
Anacortes / San Juans	4	2	2	0
Anacortes / Sidney	1	1	1	0
Total	81	47	17	17

Definitions for peak and off-peak travel times were provided by Washington State Ferries as follows:

1. **Morning Peak:** Eastbound trips that depart from the west side terminal between 5:30 and 9:00 a.m. Exception being Keystone / Port Townsend which are westbound trips departing from Keystone between 5:30 and 9:00 a.m.
2. **Afternoon Peak:** Westbound trips that depart from the east side terminal between 3:00 and 7:00 p.m. Again Keystone / Port Townsend are eastbound trips (departing from Port Townsend) during these times.
3. **Weekend Peak:** Westbound trips originating between 8:00 a.m. and Noon on Saturdays and eastbound trips originating between Noon and 8:00 p.m. on Sundays.
4. **Off-Peak:** All other weekday trips between 9:05 a.m. and 3:00 p.m. and from 7:05 p.m. to the last sailing.

Sampled trips were “yoked” or paired with a return trip departing approximately 30 to 60 minutes after the sampled trip was completed. This allowed the survey personnel to return to their origin. With this pairing, surveys were scheduled to be distributed on 316 one-way trips. In actuality, surveys were distributed on 325 trips. The table below provides the breakdown of the final sampled trips.

Table 12: Total Number of One-Way Trips Surveyed

Route	Winter 2008		Summer 2008	
	# of One-Way Trips (Planned)	# of One-Way Trips Actual	# of One-Way Trips (Planned)	# of One-Way Trips Actual
Seattle / Bainbridge	36	35	36	36
Seattle / Bremerton	12	10	12	10
Edmonds / Kingston	32	37	32	45
Mukilteo / Clinton	30	36	30	30
Fauntleroy / Vashon / Southworth	26	26	26	34
Point Defiance / Tahlequah	8	10	8	8
Keystone / Port Townsend	6	6	8	8
Anacortes / San Juans	4	4	8	8
Anacortes / Sidney	No winter service		2	2
Total	154	164	162	181

Data Collection and Interviewing Outcomes

Data collection occurred over a four week period during each survey wave. Each route or route group was surveyed over the course of a one-way week period. Trained survey personnel, accompanied by a supervisor, distributed surveys in advance of and during the scheduled trip. This ensured distribution only to passengers on the sampled trip. Survey personnel continued to distribute and pick-up surveys on both the passenger and vehicle decks throughout the trip. In addition, respondents were given the option to return the survey by mail (postage pre-paid) or on-line. In total more than 63,000 passengers were approached and more than 13,000 surveys returned. Returns by route are shown in the table below.

Table 13: Number of Completed Surveys – Overall and by Route

Route	Total	Winter 2008	Summer 2008
Seattle / Bainbridge	4,600	2,060	2,540
Seattle / Bremerton	1,567	758	809
Edmonds / Kingston	2,413	996	1,417
Mukilteo / Clinton	1,789	646	1,143
Fauntleroy / Vashon	503	251	252
Fauntleroy / Southworth	547	268	279
Point Defiance / Tahlequah	147	93	54
Keystone / Port Townsend	432	128	304
Anacortes / San Juans	923	271	652
Anacortes / Sidney	209	No winter service	209
Total	13,130	5,471	7,659

Questionnaire

The questionnaire was developed with input from members of the WSTC, WSF planning staff, the Ferry Advisory Executive Council, and a volunteer consultant advising WSTC on the survey process. The questionnaire also included a request for passengers to complete the additional pricing and strategy research. This research is conducted on-line. Just over 4,000 or 37 percent of those completing the on-board survey agreed to participate in this additional research and provided contact information.

Weighting

The data was weighted based on the sampling to ensure that the results of the survey represented the actual number of boardings during the sampled travel periods within each route. Data is weighted by boarding mode for the sampled trip and time boarded within route. Ridership data for weighting was provided by WSF for each survey way to correspond to the exact week during which a specific route was surveyed. The number of passengers surveyed on each route by key strata and the final weighted cell sizes are shown in the table below.

Table 14: Sample Sizes – Weighted and Unweighted

Route	Final Sample Size	% of Sample	Weighted Sample Size	% of Sample	Expanded Sample Size	% of Weekly Trips
Winter 2008						
Seattle / Bainbridge	2,060	38%	1,511	28%	113,582	28%
Seattle / Bremerton	758	14%	612	11%	46,043	11%
Edmonds / Kingston	996	18%	1,046	19%	78,663	19%
Mukilteo / Clinton	646	12%	973	18%	73,128	18%
Fauntleroy / Vashon	251	5%	495	9%	37,232	9%
Fauntleroy / Southworth	268	5%	207	4%	15,582	4%
Point Defiance / Tahlequah	93	2%	152	3%	11,448	3%
Keystone / Port Townsend	128	2%	129	2%	9,664	2%
Anacortes / San Juans	271	5%	346	6%	26,036	6%
Total	5,471		5,471		411,377	
Summer 2008						
Seattle / Bainbridge	2,540	33%	2,029	26%	149,428	26%
Seattle / Bremerton	809	11%	859	11%	63,244	11%
Edmonds / Kingston	1,417	19%	1,335	17%	98,335	17%
Mukilteo / Clinton	1,143	15%	1,247	16%	91,838	16%
Fauntleroy / Vashon	252	3%	617	8%	45,439	8%
Fauntleroy / Southworth	279	4%	301	4%	22,148	4%
Point Defiance / Tahlequah	54	1%	200	3%	14,726	3%
Keystone / Port Townsend	304	4%	209	3%	15,383	3%
Anacortes / San Juans	652	9%	737	10%	54,294	10%
Anacortes / Sidney	209	3%	126	2%	9,265	2%
Total	7,659		7,659		564,099	

Relevant Questionnaire Sections

Color Codes:

Q# Winter and Summer Question

Q# Winter Question

Q# Summer Question

Q34) Overall, **How Satisfied** are you with Washington State Ferries?

Extremely
Satisfied

5

Somewhat
Satisfied

4

Neither Satisfied
nor Dissatisfied

3

Somewhat
Dissatisfied

2

Extremely
Dissatisfied

1

Q35) Considering your personal experience with the ferries, which of the following phrases **Best Describes The Value**, to you, of riding Washington State Ferries? “Value” means what you receive for the amount you pay. Is the Washington State Ferries...?

A Very Good
Value

5

A Good
Value

4

Neither A Good Nor
Poor Value

3

A Poor
Value

2

A Very Poor
Value

1