Washington State Transportation Commission
Washington State Ferries 2014 Customer Research

Summary of Findings Report

January 2015

Washington State Transportation Commission

EMC RESEARCH MARKET & OPINION RESEARCH SERVICES

Overview of Study Efforts

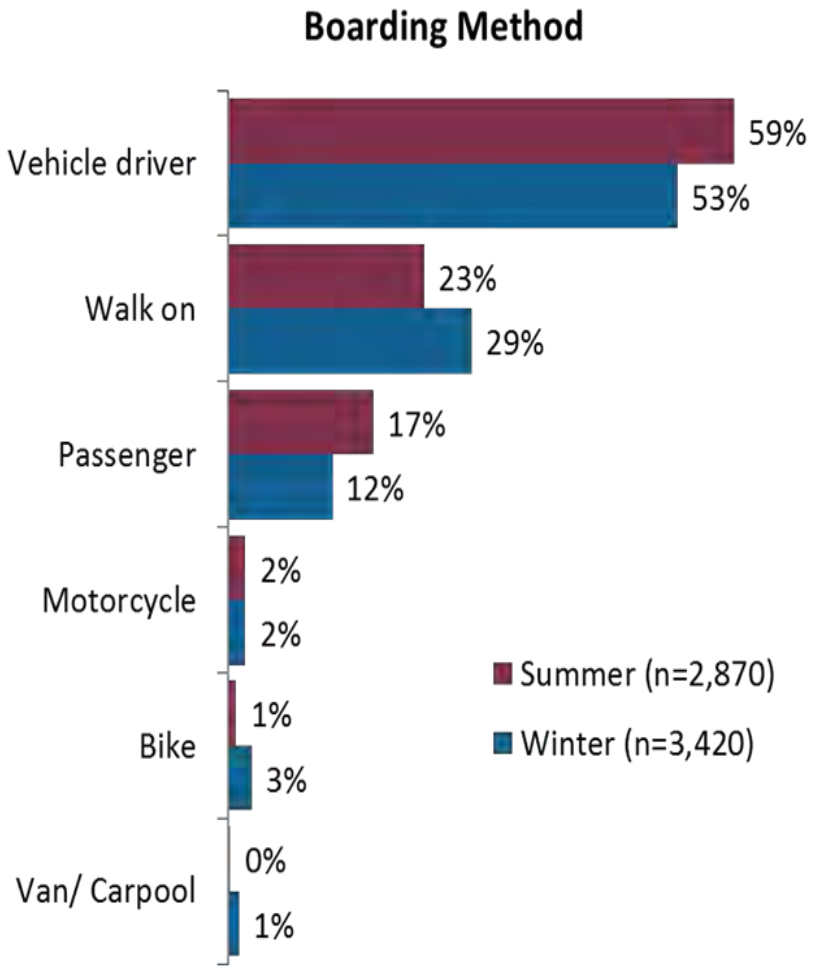
The 2014 research initiative consisted of the following studies:

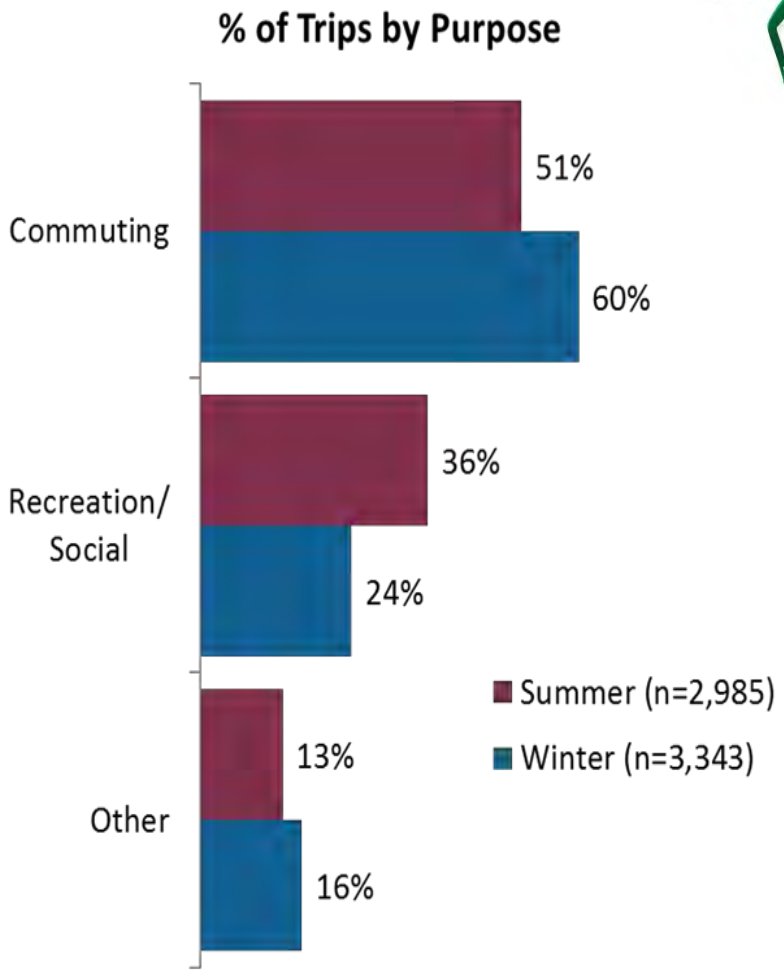
Survey	Sample Universe	Interviewing Month
Winter Rider Survey	FROG Panel members	April 2014
Freight Shipper Survey	Freight Companies	April 2014
Spring Policy Survey	FROG Panel members	June 2014
General Public Survey	VOWS Panel members	June 2014
Summer Onboard Survey	Ferry Riders not in panel	August 2014
Summer Rider Survey	FROG Panel members	October 2014
Fall Policy Survey	FROG Panel members	October 2014

The objective of the 2014 research was to understand travel behavior, satisfaction with WSF performance on key attributes, and opinions regarding key issues currently facing the state ferry system among customers. The objectives included:

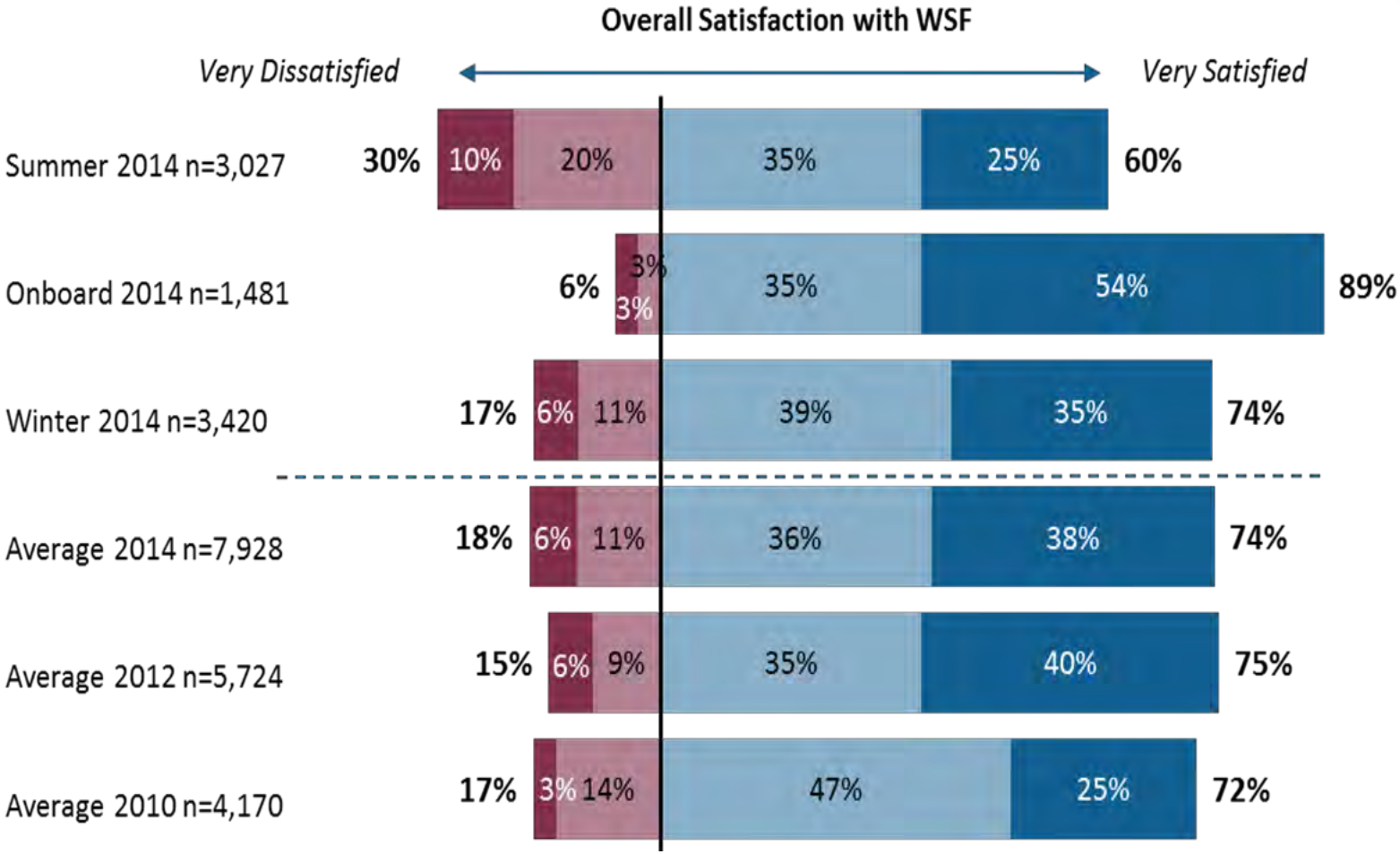
Winter/Summer Rider satisfaction with WSF performance
Winter/Summer Rider travel behavior
Current and potential recreational usage of WSF
Freight shippers usage and attitudes towards WSF
Attitudes towards WSF held by the general public
Attitudes about fare structure
Attitudes about capital funding and maintenance needs

Boarding Method & Purpose - FROG





Satisfaction – FROG & On-boards



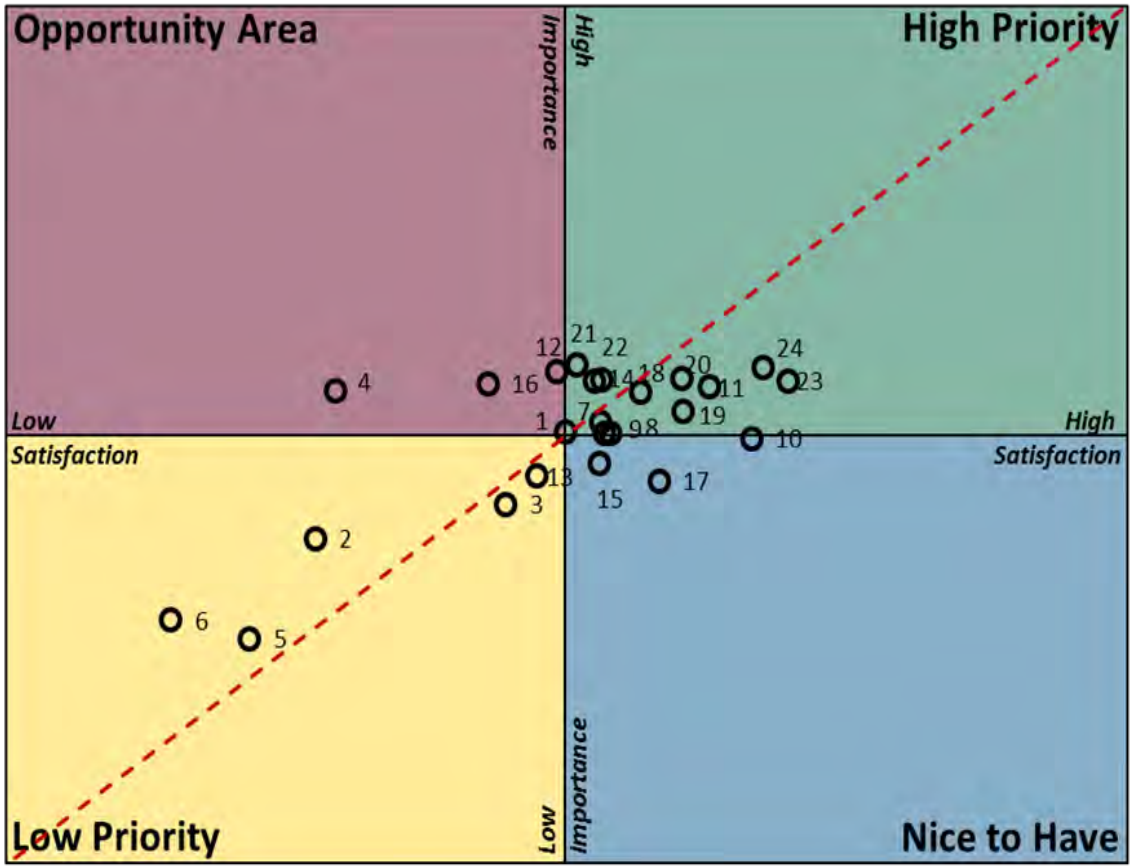
WSF Performance Satisfaction

Code	Attributes	Winter 2014		Winter 2012	
		Dissatisfaction	Satisfaction	Dissatisfaction	Satisfaction
6	Adequate parking near terminals	26%	43%	37%	30%
4	Terminal bathrooms clean	21%	54%	--	--
2	Terminals are comfortable	16%	53%	16%	54%
5	WSF and Transit schedules coordinated	14%	48%	19%	40%
16	Loading crews provide clear directions	13%	65%	15%	61%
12	Efficiently processes vehicles	11%	70%	14%	65%
7	Easy loading/ unloading for walk-on	10%	73%	13%	68%
13	Vehicle loading crew is friendly	9%	69%	9%	65%
14	Loading procedures efficient	9%	73%	11%	68%
8	Passenger loading efficient	8%	74%	10%	68%
22	Vessels are well maintained	8%	73%	10%	67%
21	Ferries Bathrooms are clean	8%	72%	11%	67%
9	Passenger unloading efficient	8%	74%	12%	66%
3	Terminal Staff is helpful	8%	67%	--	--
1	Terminals are clean	7%	71%	9%	66%
18	Unloading procedures efficient	7%	76%	9%	72%
15	Loads ferries to capacity	7%	73%	11%	69%
11	Buying tickets easy and quick	5%	81%	--	--
20	Passenger seating areas are clean	5%	79%	7%	74%
24	Vessel crew is helpful	4%	85%	4%	81%
19	Unloading crews provide clear directions	4%	79%	4%	74%
10	Toll booth staff is friendly	4%	84%	--	--
23	Vessel crew is friendly	4%	87%	6%	81%
17	Unloading crew is friendly	3%	78%	4%	74%

WSF Importance/Satisfaction Grid

	Attribute Key
1	Terminals are clean
2	Terminals are comfortable
3	Terminal Staff is helpful
4	Terminal bathrooms clean
5	WSF and Transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading/ unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries Bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

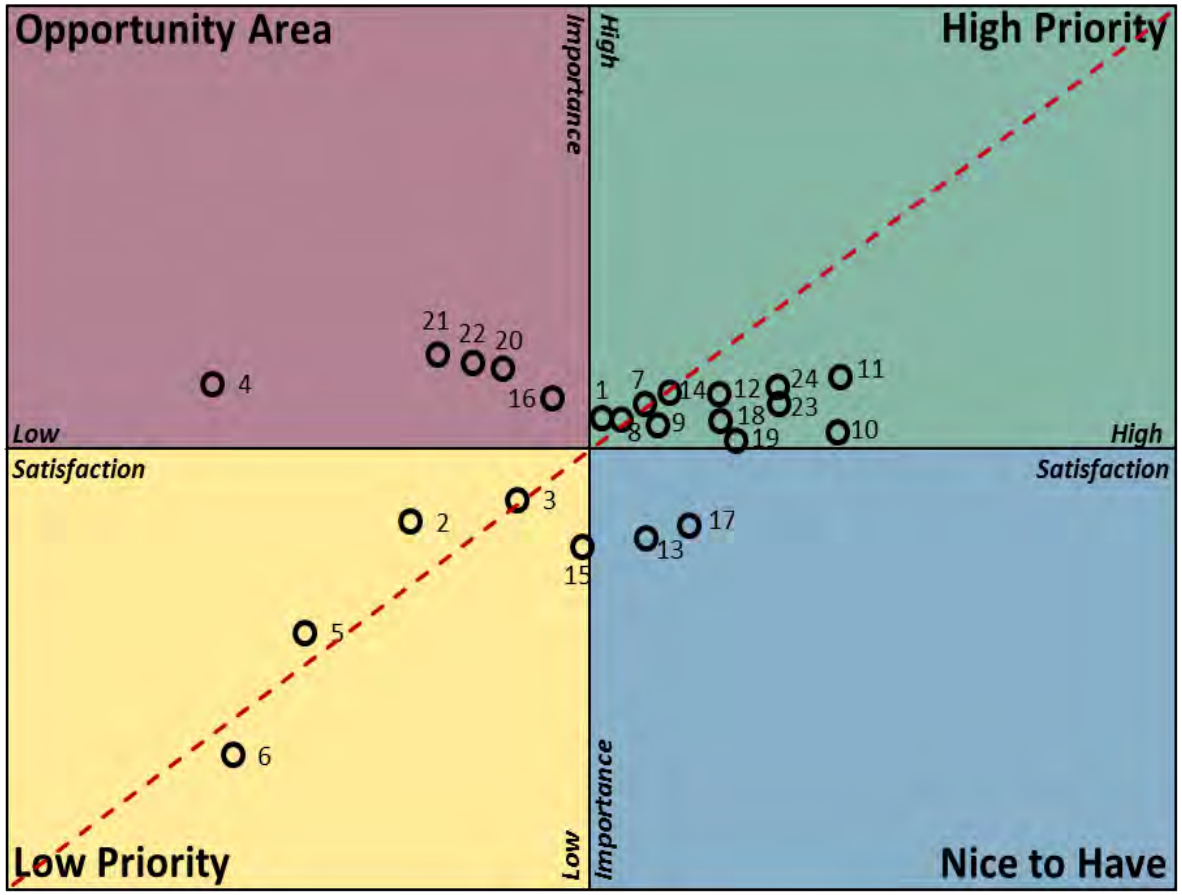
Satisfaction vs. Importance Ratings *(n=3144-1336)*



WSF Imp/Sat Grid – Seattle/Bremerton

	Attribute Key
1	Terminals are clean
2	Terminals are comfortable
3	Terminal Staff is helpful
4	Terminal bathrooms clean
5	WSF and Transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading/ unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries Bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

Satisfaction vs. Importance Ratings *(n=373-159)*



Opportunity Area – Terminal Bathrooms

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		2332	720	267	48	219	189	109	17	72	366	292	33
The bathrooms in the terminals are clean and well maintained (2014)	Imp. (4-5)	95%	95%	95%	96%	94%	96%	97%	100%	99%	95%	92%	83%
	Sat. (4-5)	54%	38%	42%	58%	62%	81%	72%	76%	79%	69%	61%	50%
	Dissat. (1-2)	21%	32%	28%	12%	15%	5%	11%	6%	4%	8%	17%	8%

Top 5 Unsatisfactory Terminals	
Seattle	55%
Bainbridge	17%
Bremerton	5%
Anacortes	4%
Mukilteo	3%

Attribute Key Code - 4

Example of Verbatim Complaints
Seattle - They are kinda ghetto especially without mirrors
Seattle - Generally. don't give appearance of good maintenance
Seattle - No toilet paper, paper towels empty or scattered on the floor. dirty floor.
Seattle - The janitor is a real social gadfly. real social, no cleaning. vomit on the floor and all they can do is put out yellow cones and tell people not to step in it...
Seattle - Inadequate, scuzzy. minimal sink. unsanitary.
Seattle - Bathrooms are filthy!
Bainbridge - The bathrooms are extremely outdated and are always scarily filthy. it seems like the cleaning schedule is either infrequent, or cleanings are less than adequate.
Bainbridge - Not enough stalls, one sink, dirty floors

Opportunity Area - Directions

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	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
	Respondents	2954	751	240	73	344	240	151	17	82	562	449	45
WSF vehicle loading crews provide clear directions / hand signals (2014)	Imp. (4-5)	96%	95%	94%	100%	95%	95%	96%	100%	99%	97%	97%	95%
	Sat. (4-5)	65%	72%	66%	61%	70%	55%	63%	66%	73%	58%	58%	24%
	Dissat. (1-2)	13%	8%	9%	11%	11%	18%	15%	11%	11%	19%	18%	29%
2012	Dissat. (1-2)	15%	10%	19%	22%	12%	18%	--	--	9%	17%	17%	--

Top 5 Unsatisfactory Terminals	
Clinton	16%
Kingston	12%
Bainbridge	10%
Anacortes	8%
Fauntleroy	8%

Attribute Key Code - 16

Example of Verbatim Complaints
Bainbridge - Sometimes they are not clear in their directions
Kingston - Inefficient. they favor their buddies
Clinton - Too busy chatting to tell me where to drive on at
Clinton - There are some older deck hands that don't put a lot of energy in their job.
Anacortes - Dissatisfied behavior, frustrated looks
Fauntleroy - Occasionally they put me in the wrong line.
Mukilteo - Not all crew members give clear hand signals
Vashon - Some people's gestures are unclear and confusing
Southworth - Please see my earlier comments about the passive aggressiveness of loading crews.

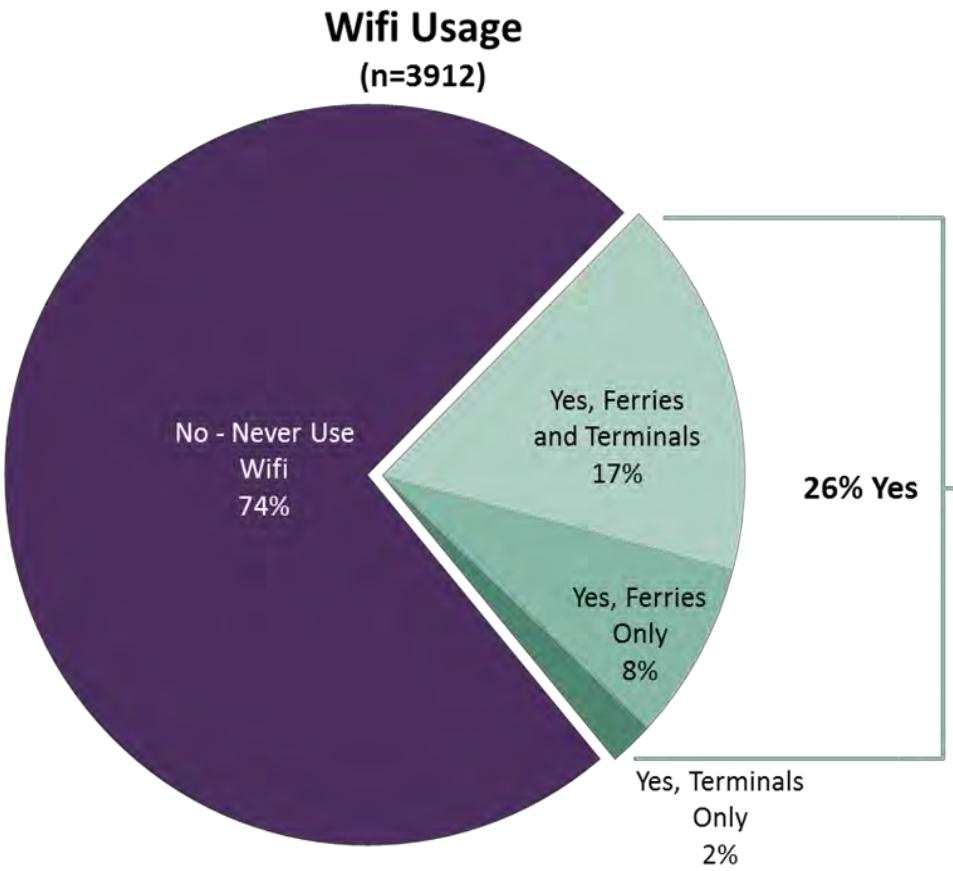
Opportunity Area - Ferries Bathrooms

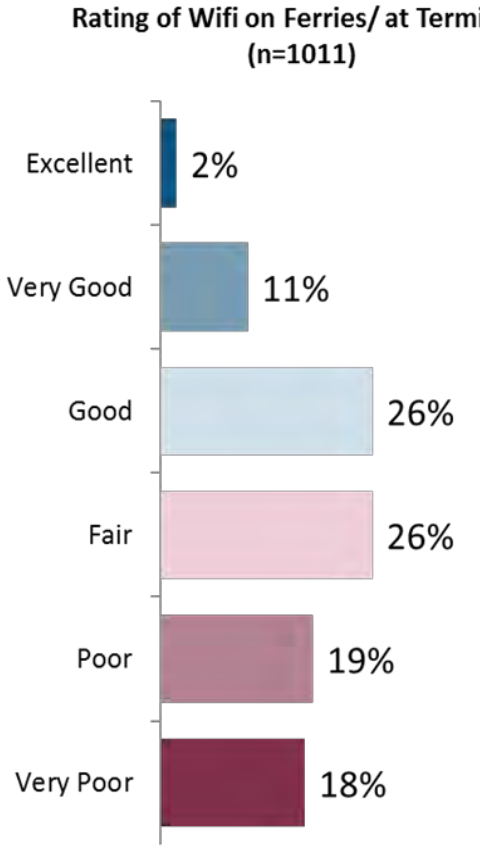
Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		3150	829	321	71	352	242	157	22	90	553	468	45
The bathrooms on the ferries are clean and well maintained (2014)	Imp. (4-5)	**98%**	98%	98%	97%	96%	98%	98%	100%	99%	97%	98%	95%
	Sat. (4-5)	**72%**	71%	58%	91%	75%	79%	74%	64%	88%	73%	64%	67%
	Dissat. (1-2)	**8%**	8%	19%	0%	7%	3%	6%	0%	2%	8%	12%	10%
2012	Dissat. (1-2)	**11%**	13%	23%	0%	8%	4%	--	--	5%	8%	11%	--

Top 5 Unsatisfactory Vessels	
Tacoma	15%
Kitsap	9%
Kittitas	9%
Chelan	7%
Spokane	5%

Example of Verbatim Complaints
Tacoma - Bathrooms need refurbishing
Tacoma - The floors in the stalls have a grime buildup.
Kittitas - Bathrooms usually smell horrible.
Kittitas - Old and smelly. lack of privacy
Kitsap - Cleaning equipment in disarray.
Kitsap - The floors are filthy
Walla Walla - Clean the restroom and you do not need 10 air fresheners to hide the smell.
Chelan - Smell, clogged toilets etc.
Kennewick - Automatic toilets don't flush, soap didn't dispense

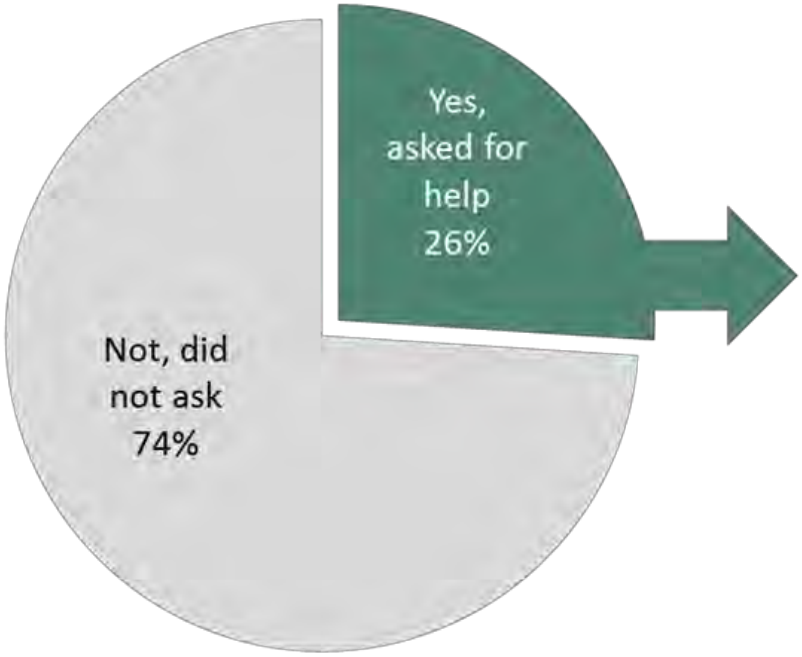
WiFi Usage & Satisfaction - FROG



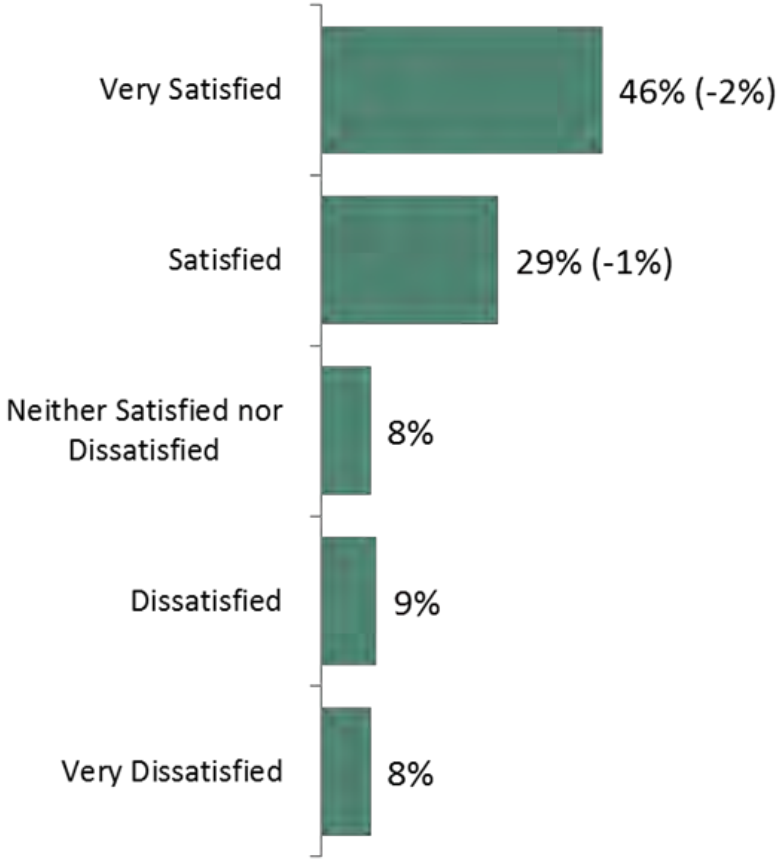


WSF Staff Performance

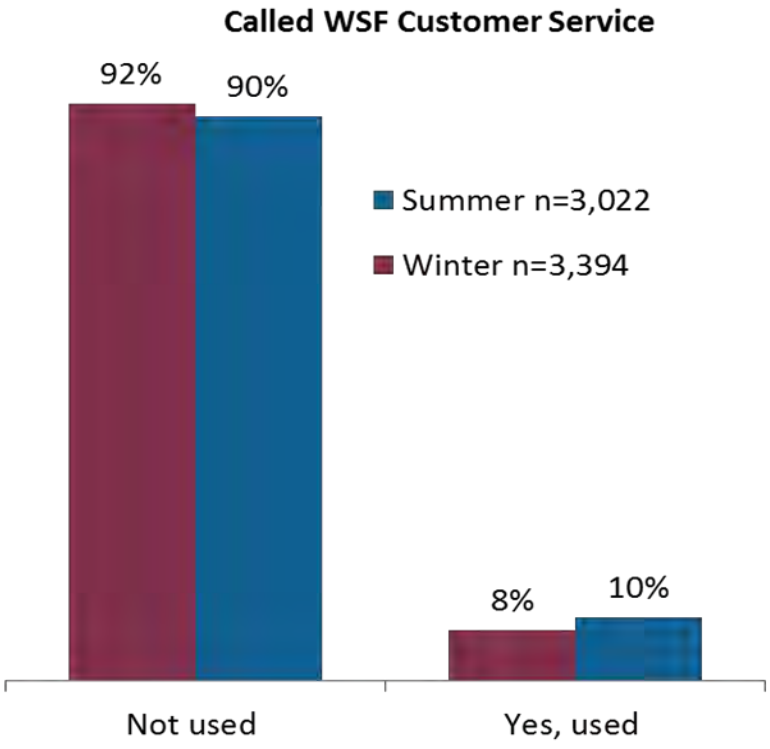
Asked Terminal Staff for Help
n=3,420

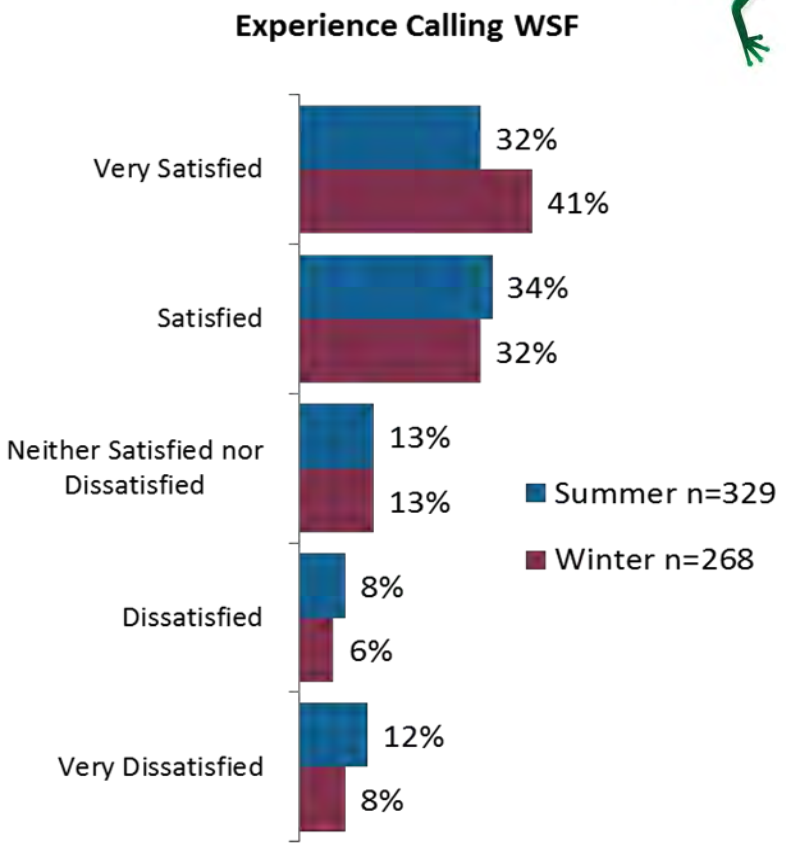


Experience with Staff
n=639

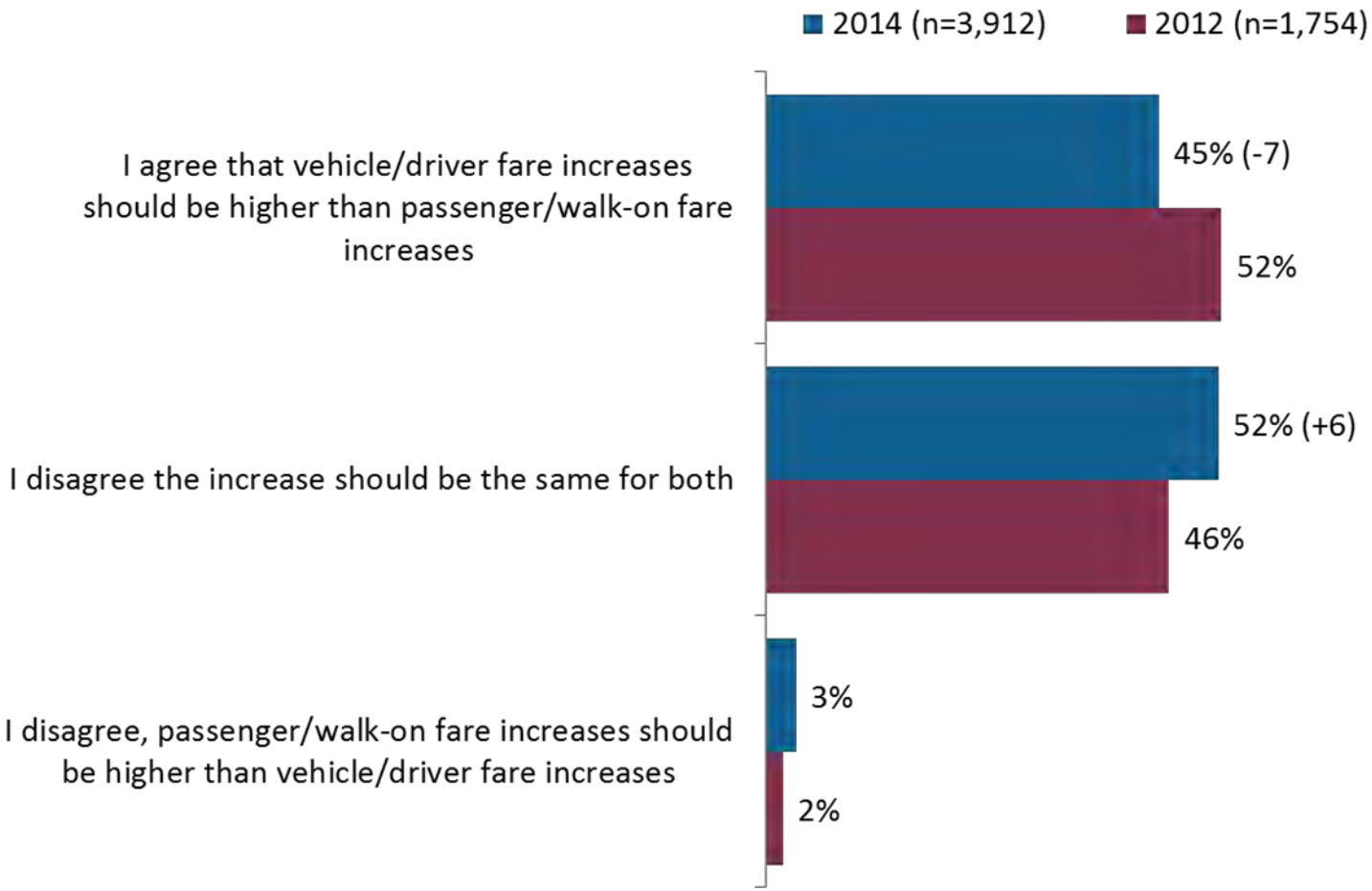


WSF Telephone Support

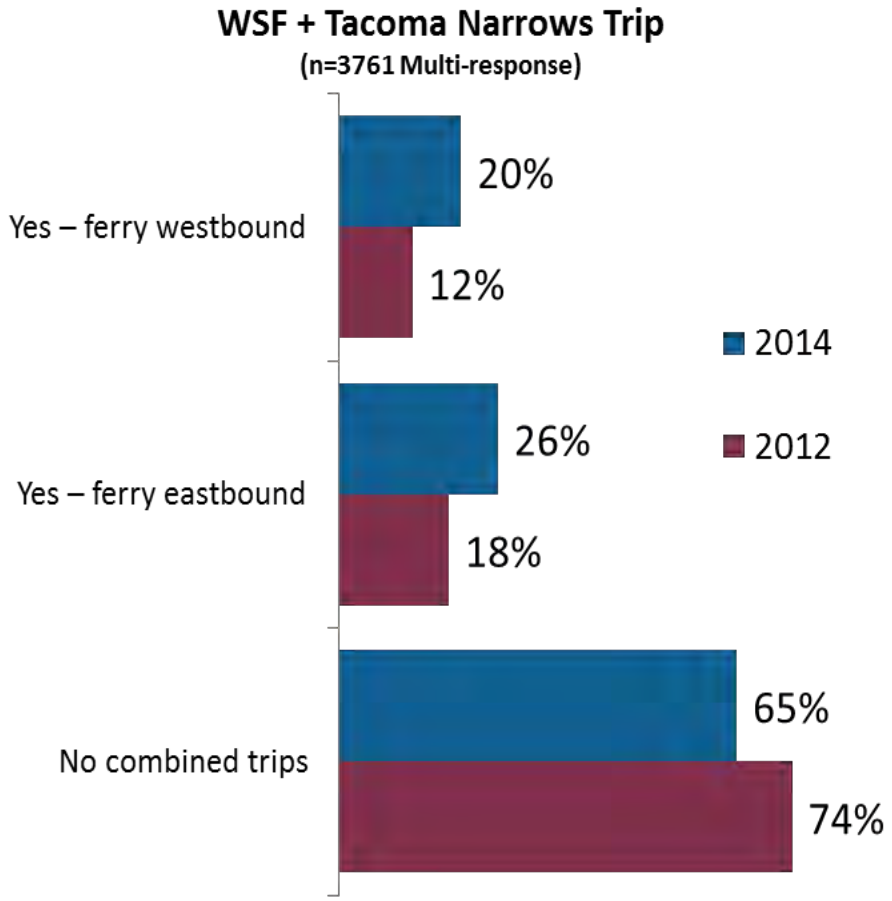




Fare Increase – Vehicle vs. Walk-on



WSF + TNB For Free - FROG



Commute Frequency	2014	2012
Less than 1 trip per month	61%	50%
1 trip per month	15%	24%
2-5 trips per month	18%	23%
6-10 trips per month	3%	1%
More than 10 per month	4%	2%

THANK YOU!

For More Information Contact:

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