



Washington State Ferries 2020-2021 Performance & Experience Research



Agenda

- ▶ Introductions
- ▶ Who is Pacific Market Research
- ▶ Projects
 - ▶ FROG Panel
 - ▶ Winter Performance
 - ▶ Freight
 - ▶ Summer On-board Intercepts/Recreation
 - ▶ Interviewers/Interceptors Process
 - ▶ Summer Performance
 - ▶ Overall Project Schedule
- ▶ Reporting and Data Usage
- ▶ Q&A

TEAM

John Cell

Senior Director of
Custom Insights

Overall account management.



Chelsea Benning

Director of Design
and Analysis

Principal investigator, analysis and
reporting oversight.

Mary Spain

Project Director

FROG panel/technical
administrator.



Rachel Austin

Senior Research Manager

Will assist in study execution, and
responsible for all data processing.

Stevie Hanna

Research Analyst

Marketing and communications,
FROG panel promotion and
recruitment.



Christine Jones

Project Manager

Data collection
interceptor/interviewer coordinator

Bill Young, Research Assurance

Consultant/oversite and knowledge transfer.

OUR VALUE

Veteran Organization

In business since 1989

Experienced

Consultants, Analysts, Strategists,
and Data Collectors

Local

HQ in Renton, Washington



OUR MISSION

To bring people,
information and ideas
together to enrich lives
and build community

DEEP EXPERIENCE

Highly experienced across verticals and offer expertise in:

- Rider Segmentation and Needs Based Planning
- Origin & Destination (O&D)
- Marketing and PR Communication
- Pricing Sensitivity/Elasticity and Fare Studies
- Positioning Studies
- Feature Development and Optimization
- Rider Experience/Journey Mapping
- Message Development & Testing
- Cost Benefit, SWOT and Market Sizing Modeling
- Experimental Design (Classic and Modified)
- Choice Based Conjoint (Full Profile/CBC/ACA/ACBC)
- Observational Research
- Focus Groups / IDI's
- Quick Polls

WSF Performance Research and FROG

WSF Performance Research

- ▶ History of past research
- ▶ How has it been used
- ▶ Successes/Opportunities
- ▶ Communication
- ▶ 2020 Winter Performance
 - ▶ Research Objectives and Goals for 2020?





Welcome to the Ferry Riders' Opinion Group (FROG)!

As a member of FROG, you get an opportunity to continually voice your opinions on important ferry issues. FROG provides an outlet where you can share your travel behaviors, opinions, and preferences as well as provide feedback on a number of operational and pricing strategies that are or may be considered by the state. It is your way to make your voice heard!

Join the community!

First Name

Last Name

Email:

Create Password:



My Surveys You may change or update your preference by making changes below and then clicking submit to save your changes.

Avatar

Screen name

MSpan

Time zone

Pacific

Date / time format

01/31/2020

04:05 PM

Email address

Mary.Spain@mac.com

Password

Confirm password

Opt-in (receive invitations and complete surveys)

Do not send me more survey invitations than this

units per Day

Only send mobile short messages between these times

07:00 A





07:00 P

Unsubscribe

If you no longer wish to receive surveys / notifications via email click unsubscribe below.

- ▶ Online community of roughly 24k ferry riders who have an ongoing opportunity to weigh in on ferry issues through surveys
- ▶ Anticipate 3k-5k responses to each study
- ▶ Enhanced features and functionality of survey platform

WSF Performance Research

-  **Winter Performance (2020 and 2021)**
(target audience: Commuter riders) via FROG panel
-  **Freight Survey**
(target audience: WSF freight customers) via executive telephone survey
-  **Summer On-board Recreational Survey**
(target audience: Out of state riders) via in-person intercepts
-  **Summer Performance (target audience: Commuter and social/recreational riders) via FROG panel**
 - Summer On-board Interceptors
 - Interviewers/Interceptors Process

Winter Performance

Understand ferry riders' WSF winter travel behavior and satisfaction with WSF winter performance on key attributes.

Topic Areas

- WSF Value
- Winter Period Route and Mode Usage
- Detailed Usage
 - Terminal, Walk-On, Drive-On, Vessel Deck, Website, Telephone Customer Service, and Interaction with Vessel Crew
- Customer satisfaction
 - Importance and satisfaction of terminal conditions, walk-on services, toll booth, loading and unloading procedures, vessel conditions, and WSF website and telephone services
 - If dissatisfied route and why
- Passenger only ferry usage and winter volume (new 2020)
- Profile questions (only asked if missing)

[Test link](#)

TERMINALS	Terminals Are Clean and Well Maintained
	Terminals Are Comfortable (Seating, Temperature, Etc.)
	Terminal Staff Are Helpful, Competent and Knowledgeable
	Bathrooms in The Terminals Are Clean and Well Maintained
WALK-ON	WSF Sailing Schedule Is Adequately Coordinated with Transit Services Available at the Terminal
	There Is Adequate Parking Near the Terminals
	WSF Provides Easy Loading and Unloading for Walk-On Passengers
	WSF Walk-On Passenger Loading Procedures Are Efficient
	WSF Walk-On Passenger Unloading Procedures Are Efficient
	The terminal to vessel passenger walkway is comfortable and safe
TOLL BOOTH	WSF Toll Booth Staff Are Friendly, Courteous and Polite
	WSF Makes Buying Tickets Easy and Quick
	WSF Efficiently Processes Vehicles Through Ticket Lanes
	Existing vehicle dock-side holding areas are being fully

LOADING	WSF Vehicle LOADING Crew Are Friendly, Courteous and Polite
	WSF Vehicle LOADING Procedures Are Efficient
	WSF LOADS Ferries to Capacity with Little Room Between Vehicles
	WSF Vehicle LOADING Crews Provide Clear Directions and/or Hand Signals
UNLOADING	WSF Vehicle UNLOADING Crew Are Friendly, Courteous and Polite
	WSF Vehicle UNLOADING Procedures Are Efficient
	WSF Vehicle UNLOADING Crews Provide Clear Directions and/or Hand Signals
VESSEL CONDITIONS	The Ferry Passenger Seating Areas Are Clean and Comfortable (Seating, Temperature, etc.)
	The Bathrooms on The Ferries Are Clean and Well Maintained
	WSF Vessels Are Well Maintained (Not Rusty/Dirty) And Safe (Not Cluttered)
VESSEL CREW	WSF Vessel Crew Are Friendly, Courteous and Polite
	WSF Vessel Crew Are Helpful, Competent and Knowledgeable
ARR/ DEP	WSF Has On-Time/Dependable DEPARTURES
	WSF Has On-Time/Dependable ARRIVALS



Freight Survey

Profile WSF freight customers and understand usage and attitudes regarding WSF. For those that do not use WSF understand the reasons and potential future use of WSF.

Topic Areas

- Fleet profile
- Route usage and travel behaviors
- Value perception
- Scheduling and wait times
- Reservations awareness/usage and satisfaction
- Congestion pricing
- Non-user profile and attitudes



Summer On-Board Recreational Survey

FROG Panel recruitment and on-board in person surveys conducted to reach members of the general public/out of state riders who are not part of FROG regarding specific recreational and ferry usage issues.

- Reported as part of the Summer Recreational and Performance study.

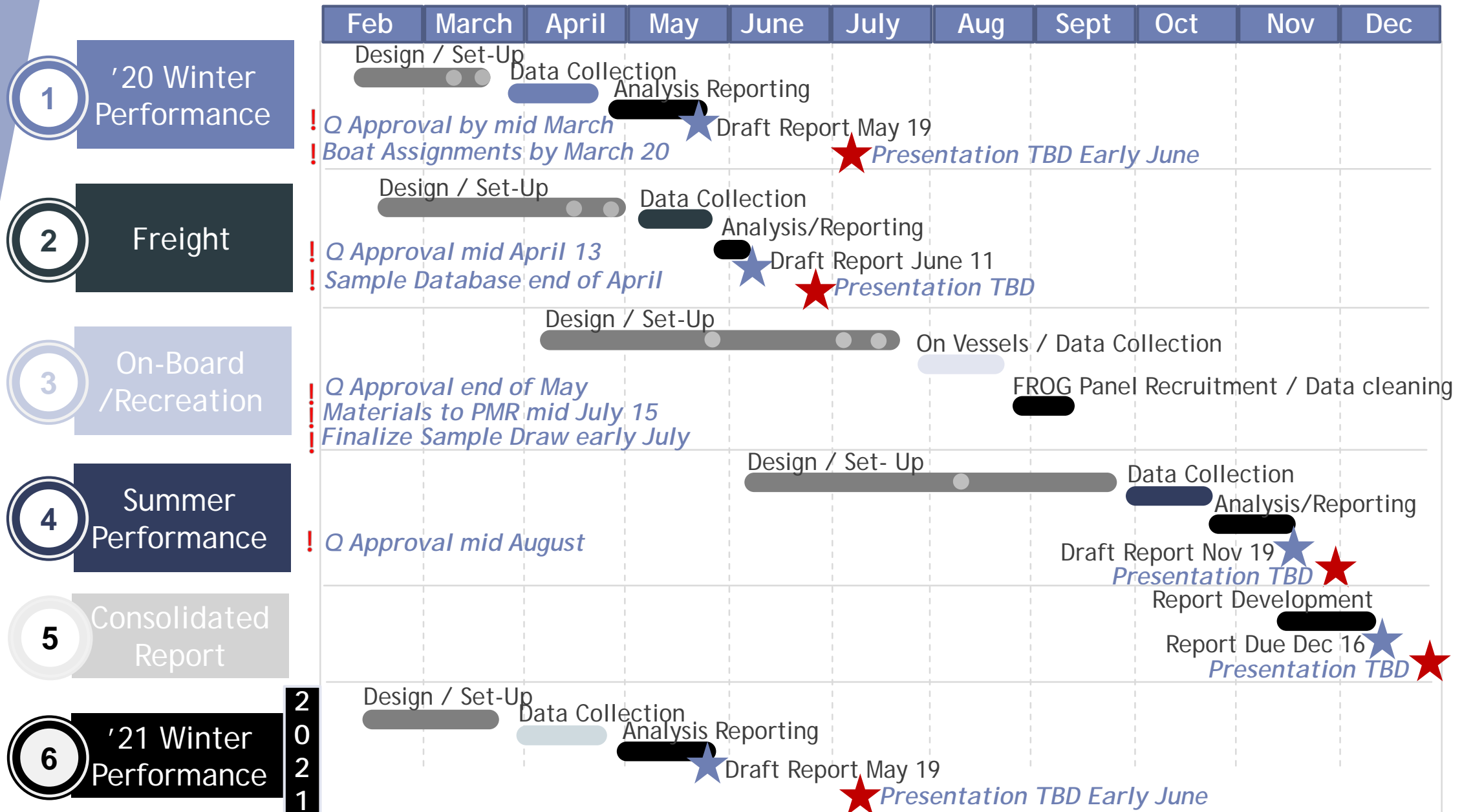
Summer Recreational and Performance

Understand ferry riders' summer travel behavior and satisfaction with WSF summer performance on key attributes.

Topic Areas

- Summer travel activity
- Social and recreational - understand role of ferries in the social and recreational summer travel
- Customer satisfaction - measure importance and satisfaction of terminal conditions, walk-on services, loading and unloading procedures, vessel conditions, and WSF website and telephone services
- Demographic characteristics of ferry customers - travel patterns, WSF satisfaction and demographic data.

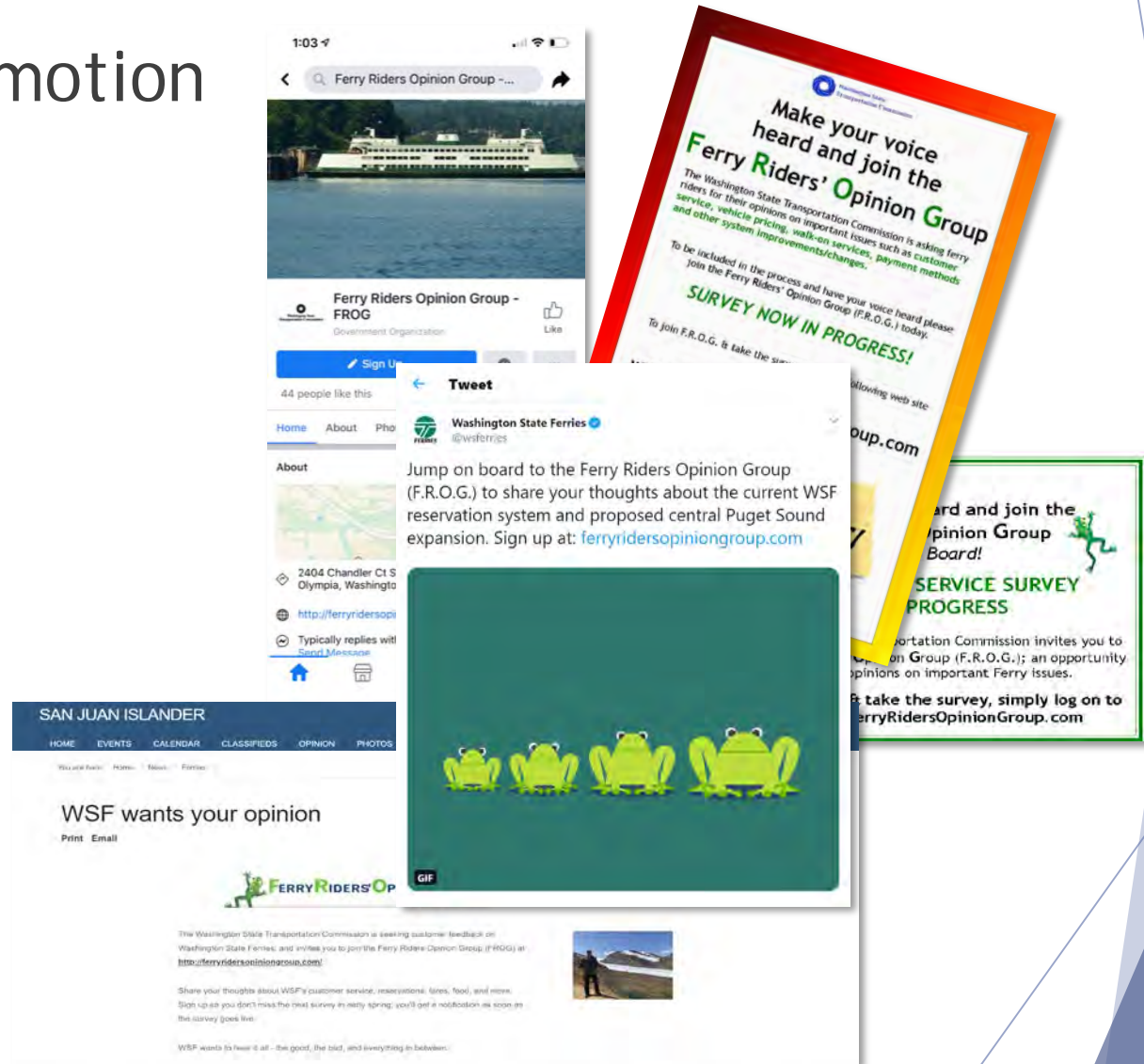
2020 Research Schedule



Communication and Promotional Activities

Survey and recruitment promotion to date

- On-board (posters/cards)
- Twitter
- Facebook
- Partner Organizations



Reporting and Data Usage



Questions?

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