



Washington State Ferries Ferry Riders' Opinion Group

2020 Special Fall Study Report



Washington State
Transportation Commission



Preface



The Ferry Riders' Opinion Group (FROG) was created in 2010 as an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). This important community of riders allows for data to be collected over time in order to gauge opinions regarding key issues and reactions to ferry operations as they evolve.

Due to the COVID-19 pandemic and shutdowns when we would normally be surveying the panel, it was decided to forgo the annual Winter Performance study as well as other studies conducted every other year. However, it was determined that there was still a need to establish a new pandemic baseline related to how ferry ridership had changed in response to the pandemic, to measure satisfaction with WSF's response to the pandemic, and to assess which changes in ferry ridership were predicated to be temporary vs. which were expected to be more permanent.





- ▶ Online survey with respondents from:
 - Ferry Riders Opinion Group (FROG) panel,
 - Voice of Washington State (VOWS) panel members who live in zip codes defined as the “ferry impact zone”, and
 - Open survey link publicized via Facebook ads as well as WSF communications including rider alerts.

- ▶ Conducted October 1st – October 26th, 2020 regarding respondents’ travel behaviors, and where appropriate, satisfaction with riding Washington State Ferries in 2020.

- ▶ A total of 7,791 interviews were completed.

- ▶ The mix of respondents represents the frequent ferry rider and/or commuter (open-link), those with high interest in WSF and ferries (FROG panel), and the more casual/infrequent rider (VOWS).

Rider Segments (FROG/Open-Sourced)



The majority of riders responding to the special COVID-19 study are continuous pandemic riders or returning riders who paused their ridership during the spring wave of the pandemic. It should also be noted that the Discontinued Riders are presumed to be less likely to respond to this study, as they are not current riders, and therefore may not be fully represented in these results.

WINTER	SPRING	SUMMER	FALL
January-March	April-June	July-September	October

Rider Segment	Definition	Sample Size (Unweighted)	% (of Sample)
2020 Continuous Rider	Rode in Winter and Spring 2020 (<i>most also rode in Summer/Fall, though this is not a requirement for being a Continuous Rider</i>)	n=3,670	65%
2020 Discontinued Riders	Rode in Winter 2020 only (no Spring or Summer/Fall ridership)	n=462	8%
2020 Returning Riders	Rode in Winter and again in Summer/Fall, but not Spring 2020	n=557	10%
2020 Summer Only Riders	Rode in Summer or Fall but did not ride in Winter 2020 (may have ridden in Spring)	n=672	11%
2019 Only Riders	Rode in 2019 but not 2020	n=328	6%

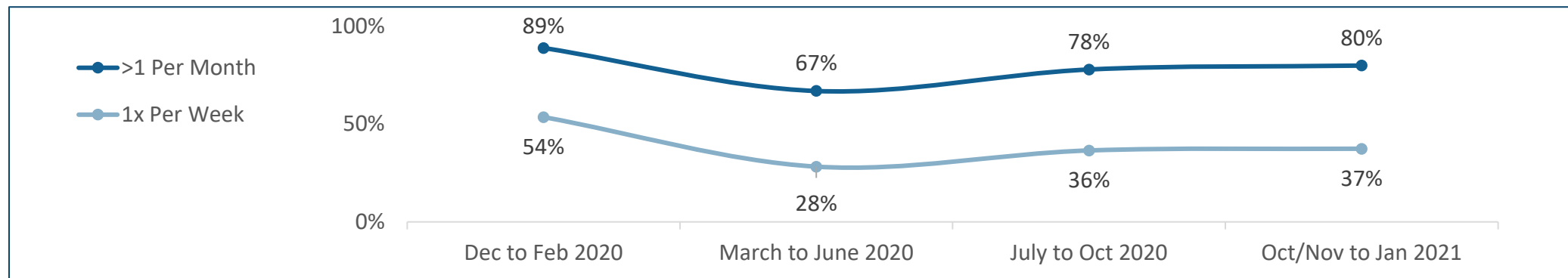
Riding Frequency Pre- and Post- COVID-19 Pandemic – 2020 Continuous Riders



Continuous Riders, by definition, rode WSF throughout 2020, though trip frequency dropped in half in the early months of the pandemic and has rebounded only slightly over the Summer months. This segment expects to continue, but not increase, this level of ridership through the Winter.

Riding WSF Prior to COVID-19 (12/19-2/20)	Continuous (n=3,670)	Riding WSF Early Months of Pandemic (3/20-6/20)	Continuous (n=3,670)	Riding WSF Past Four Months (7/20-10/20)	Continuous (n=3,670)	Anticipated Riding WSF Next Three Months	Continuous (n=3,670)
At least once a week	54%	At least once a week	28%	At least once a week	36%	At least once a week	37%
At least once a month	36%	At least once a month	39%	At least once a month	41%	At least once a month	42%
At least once every 3 months	8%	At least once in the 4 months, but less than once a month	29%	At least once in the 3 months, but less than once a month	20%	At least once in next 3 months	15%
At least once every 6 months	1%						
At least once every year	1%						
Less often than once a year	<1%						
Never/Didn't ride that period	<1%	Never/Didn't ride that period	4%	Never/I don't ride WSF	3%	Don't plan to ride WSF	2%
						Don't know/depends	3%

*Note that the timeframes used for the definition of the Rider segments and this question series do not align.



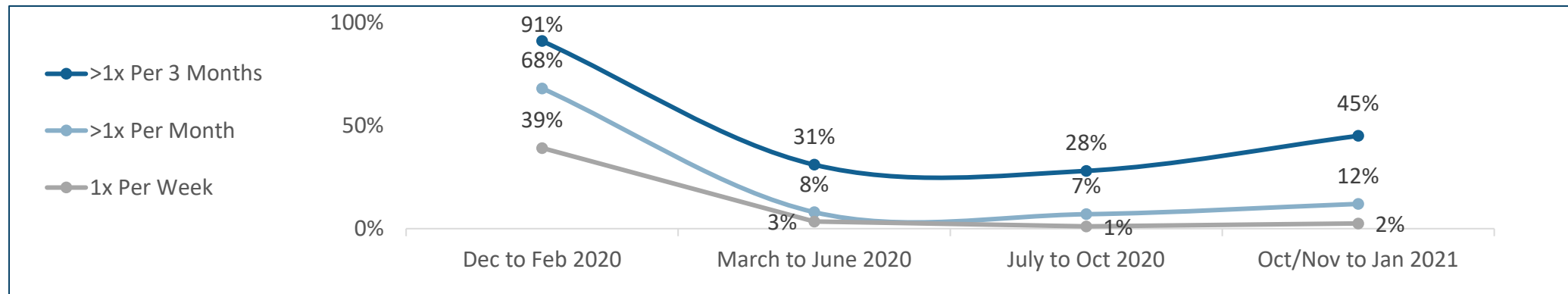
Riding Frequency Pre- and Post- COVID-19 Pandemic – 2020 Discontinued Riders



Close to half (45%) of the Discontinued Riders anticipate riding WSF in the next few months, although at a frequency well below their pre-pandemic levels.

Riding WSF Prior to COVID-19 (12/19-2/20)	Discontinued (n=462)	Riding WSF Early Months of Pandemic (3/20-6/20)	Discontinued (n=462)	Riding WSF Past Four Months (7/20-10/20)	Discontinued (n=462)	Anticipated Riding WSF Next Three Months	Discontinued (n=462)
At least once a week	39%	At least once a week	3%	At least once a week	1%	At least once a week	2%
At least once a month	29%	At least once a month	5%	At least once a month	6%	At least once a month	10%
At least once every 3 months	23%	At least once in the 4 months, but less than once a month	23%	At least once in the 3 months, but less than once a month	21%	At least once in next 3 months	33%
At least once every 6 months	5%						
At least once every year	2%						
Less often than once a year	1%						
Never/Didn't ride that period	1%	Never/Didn't ride that period	69%	Never/I don't ride WSF	72%	Don't plan to ride WSF	24%
						Don't know/depends	31%

*Note that the timeframes used for the definition of the Rider segments and this question series do not align.



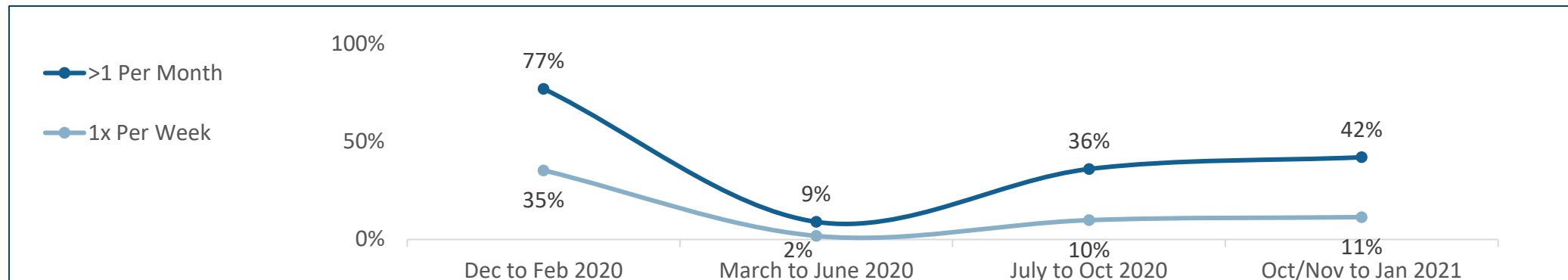
Riding Frequency Pre- and Post- COVID-19 Pandemic – 2020 Returning Riders



Returning Riders stopped riding in the early months of the pandemic, with riding frequency returning over the Summer to limited extent. More than two-in-five (43%) expect to be riding at least once per month through January, a slightly higher frequency than the past four months.

Riding WSF Prior to COVID-19 (12/19-2/20)	Returning (n=557)	Riding WSF Early Months of Pandemic (3/20-6/20)	Returning (n=557)	Riding WSF Past Four Months (7/20-10/20)	Returning (n=557)	Anticipated Riding WSF Next Three Months	Returning (n=557)
At least once a week	35%	At least once a week	2%	At least once a week	10%	At least once a week	11%
At least once a month	42%	At least once a month	7%	At least once a month	26%	At least once a month	31%
At least once every 3 months	17%	At least once in the 4 months, but less than once a month	40%	At least once in the 3 months, but less than once a month	64%	At least once in next 3 months	43%
At least once every 6 months	4%						
At least once every year	1%						
Less often than once a year	0%						
Never/Didn't ride that period	<1%	Never/Didn't ride that period	51%	Never/I don't ride WSF	1%	Don't plan to ride WSF	5%
						Don't know/depends	9%

*Note that the timeframes used for the definition of the Rider segments and this question series do not align.



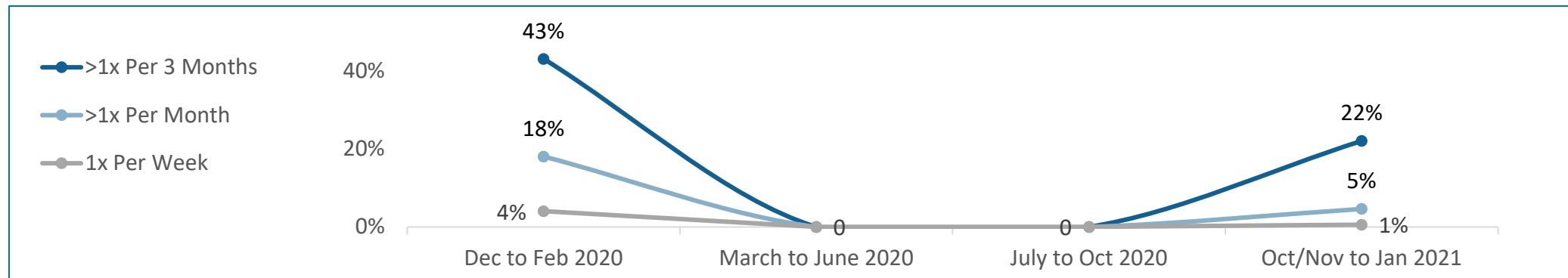
Riding Frequency Pre- and Post- COVID-19 Pandemic – 2019 Only Riders



Just under a quarter (23%) of riders who did not travel on WSF at all in 2020 believe they will take at least one ferry trip in the next three months.

Riding WSF Prior to COVID-19 (12/19-2/20)	2019 Only (n=328)	Riding WSF Early Months of Pandemic (3/20-6/20)	2019 Only (n=328)	Riding WSF Past Four Months (7/20-10/20)	2019 Only (n=328)	Anticipated Riding WSF Next Three Months	2019 Only (n=328)	
At least once a week	4%	At least once a week		At least once a week		At least once a week	<1%	
At least once a month	14%	At least once a month		At least once a month		At least once a month	5%	
At least once every 3 months	25%	At least once in the 4 months, but less than once a month		At least once in the 3 months, but less than once a month		At least once in next 3 months	17%	
At least once every 6 months	21%							
At least once every year	18%							
Less often than once a year	4%							
Never/Didn't ride that period	14%	Never/Didn't ride that period	100%	Never/I don't ride WSF	100%	Don't plan to ride WSF	37%	
						Don't know/depends	41%	

*Note that the timeframes used for the definition of the Rider segments and this question series do not align.

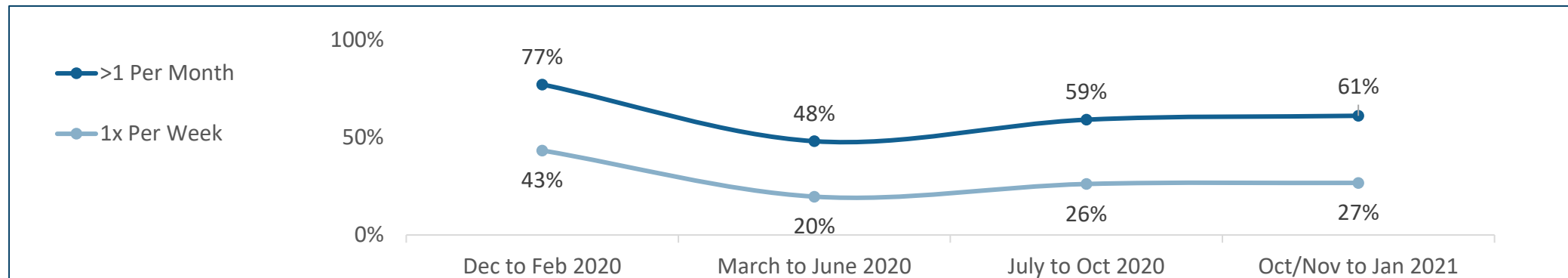


Riding Frequency Pre- and Post- COVID-19 Pandemic – Total FROG/Open



The number of riders traveling frequently (e.g. once a week or more often) dropped sharply in the early months of the pandemic (from 43% to only 20%) and has only rebounded up to 26% of riders over the Summer. Travel frequency is not expected to increase in Winter 2020-2021.

Riding WSF Prior to COVID-19 (12/19-2/20)	TOTAL (n=5,689)	Riding WSF Early Months of Pandemic (3/20-6/20)	TOTAL (n=5,689)	Riding WSF Past Four Months (7/20-10/20)	TOTAL (n=5,689)	Anticipated Riding WSF Next Three Months	TOTAL (n=5,689)
At least once a week	43%	At least once a week	20%	At least once a week	26%	At least once a week	27%
At least once a month	34%	At least once a month	28%	At least once a month	33%	At least once a month	34%
At least once every 3 months	14%	At least once in the 4 months, but less than once a month	29%	At least once in the 3 months, but less than once a month	27%	At least once in next 3 months	22%
At least once every 6 months	5%						
At least once every year	2%						
Less often than once a year	<1%						
Never/Didn't ride that period	2%	Never/Didn't ride that period	24%	Never/I don't ride WSF	14%	Don't plan to ride WSF	7%
						Don't know/depends	10%



Reasons for Riding WSF Less Often



Limiting travel due to concerns with COVID-19 is the number one reason for riding WSF less often. Around a third note that changes to the schedule (32%), the time it takes for travel on the ferries (31%) and working from home (30%) are the reasons for their lower ridership.

Barriers by Rider Segment	2020 FROG/Open n=4,638	2020 Continuous Riders n=2,855	2020 Discontinued Riders n=448	2020 Returning Riders n=518	2020 Summer Riders n=508	2019 Only Riders n=309
I am limiting my trips due to concerns about COVID	77%	74%	82%	87%	81%	83%
The WSF sailing schedule is too infrequent / unreliable to meet my needs	32%	37%	20%	28%	29%	11%
It takes too long to take the ferries (delays, wait times) so I am not riding as often	31%	37%	17%	24%	29%	15%
I am working from home, so I do not need to make these trips	30%	31%	41%	32%	18%	15%
I avoid taking the ferry by using a different way of getting where I need to go	18%	17%	24%	13%	23%	12%
Other Covid related (travel or WSF restrictions/border closed/Stay Home Stay Safe)	11%	10%	12%	12%	12%	11%
Other non-Covid related (retired/bridge closure/Seattle safety, etc.)	9%	9%	9%	5%	10%	16%
I was laid-off or furloughed from my job, so I no longer need to make these trips	7%	7%	6%	8%	5%	5%
Cost/ summer rates in winter/fees	3%	3%	1%	3%	3%	1%

Compared to other segments, Discontinued Riders are more likely to be working from home (41%) while Continuous Riders are more likely to say the changes to the schedule (37%) and the time it takes to travel by ferries (37%) are impacting the number of trips they take.

Both Discontinued Riders and Summer Only Riders are more likely than others to take alternative means of transportation instead of the ferries.

Returning Riders are more likely than other riders to say they limited their travel due to COVID-19 concerns.

2019 Only Riders are more likely to say their travel needs have changed for other reasons, not related to COVID.

Significantly higher than three or more groups
Significantly lower than three or more groups

Q4A/B series. For each of the following, please select all those that describe why you are riding Washington State Ferries less often than you were before the COVID-19 pandemic (before March 2020)? (Base: FROG/Open 2019 or 2020 Riders Taking Fewer Trips)

Reasons for Riding WSF Less Often– By Route



Concerns about COVID-19 play more of role in limiting trips on the Point Defiance/Tahlequah route, and are less of a factor among riders of the Seattle/Bremerton and Fauntleroy/Southworth routes. Working from home plays a more notable role in limiting rides on the Seattle/Bainbridge, Seattle/Bremerton, and Fauntleroy/Southworth routes. Seattle/Bremerton, Fauntleroy/Vashon and riders of the San Juan routes are more likely to say the infrequent schedule and/or the length of time it takes to travel are barriers to ferry ridership.

Barriers by Most Recent Route Taken	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents	4638	739	326	107	591	269	194	39*	284	610	1373	86*
I am limiting my trips due to concerns about COVID	77%	78%	59%	87%	78%	82%	61%	72%	78%	80%	80%	84%
The WSF sailing schedule is too infrequent / unreliable to meet my needs	32%	30%	57%	26%	27%	47%	36%	36%	20%	18%	50%	52%
It takes too long to take the ferries (delays, wait times) so am not riding as often	31%	25%	27%	24%	29%	38%	31%	32%	23%	29%	56%	58%
I am working from home, so I do not need to make these trips	30%	39%	40%	37%	26%	32%	35%	38%	18%	27%	15%	14%
I avoid taking the ferry by using a different way of getting where I need to go	18%	16%	31%	6%	25%	8%	32%	29%	19%	14%	8%	4%
Other COVID related reasons (travel restrictions/border closed/Stay Home Stay Safe/WSF COVID restrictions)	11%	10%	9%	15%	13%	8%	7%	15%	16%	10%	11%	9%
Other non-COVID related reasons (retired/bridge closure/Seattle safety, etc.)	9%	8%	9%	21%	11%	10%	17%	5%	7%	8%	4%	5%
I was laid-off or furloughed from my job, so I no longer need to make these trips	7%	7%	9%	11%	7%	8%	4%	0%	5%	8%	4%	8%
Cost/ summer rates in winter/fees	3%	2%	3%	1%	4%	4%	3%	2%	1%	4%	3%	4%
Other WSF (general service concerns/other WSF issues)	2%	1%	2%	0%	2%	3%	2%	0%	1%	2%	4%	7%
Nothing (traveling the same)	1%	2%	1%	1%	1%	1%	2%	0%	2%	1%	1%	0%

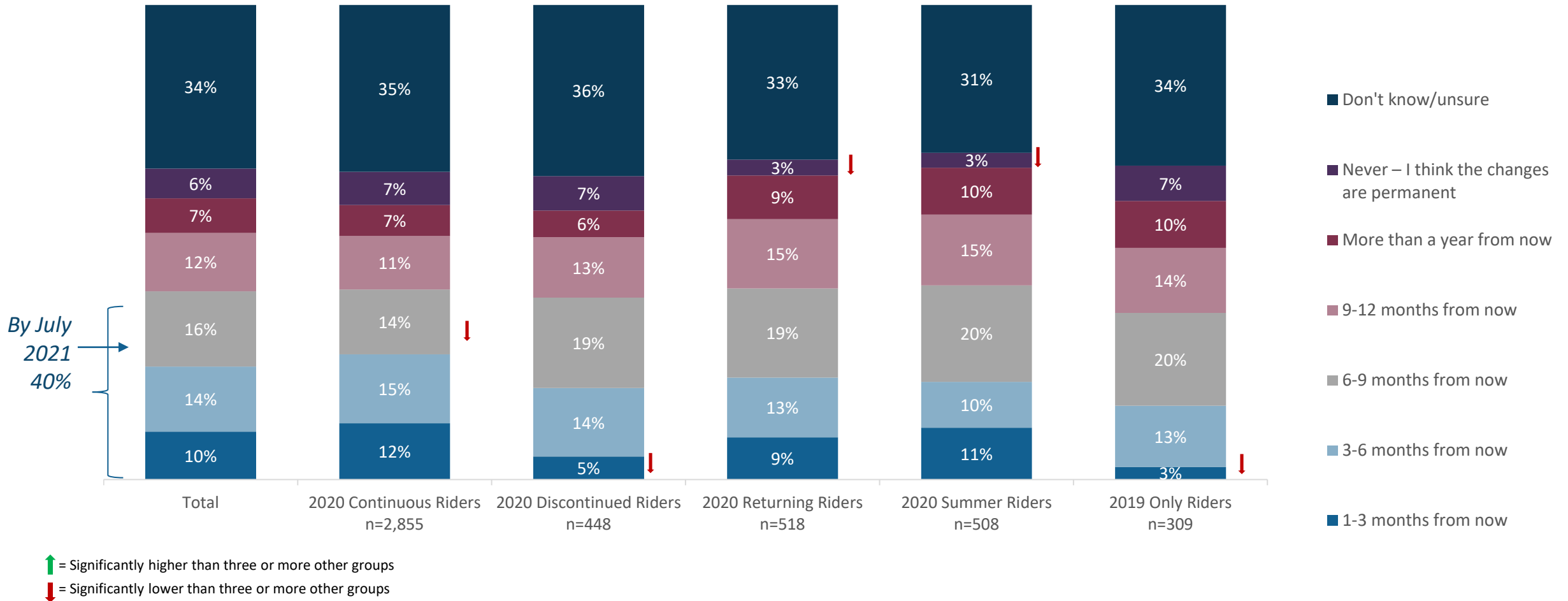
Significantly higher than six or more routes
 Significantly lower than six or more routes

Q4A/B series. For each of the following, please select all those that describe why you are riding Washington State Ferries less often than you were before the COVID-19 pandemic (before March 2020)? (Base: FROG/Open 2019 or 2020 Riders Taking Fewer Trips) *Caution small sample sizes.

Anticipated Return to Ridership Levels



While few (6%) feel their lowered levels of riding will be permanent, the return to previous levels of riding will not be swift. Only two-in-five (40%) believe that their ridership will return to pre-pandemic levels by July 2021. One third (34%) do not know when their ridership will return.

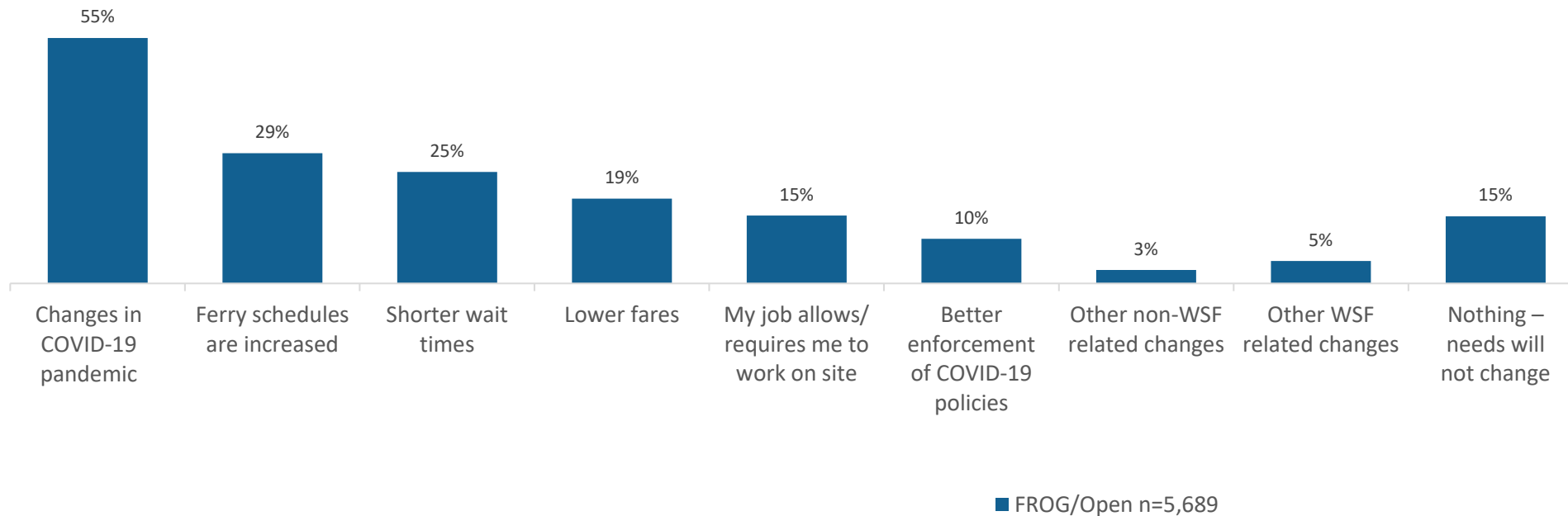


Q5. When, if ever, do you anticipate your ferry riding will return to the levels it was prior to the pandemic? (Base: FROG/Open 2019 or 2020 Riders Taking Fewer Trips)

Changes to Increase Ridership



More than half say it will take changes in the COVID-19 pandemic (a decreased spread or vaccines) to increase their WSF ridership, but a significant minority feel that schedule increases (29%) and shorter wait times (24%) would lead them to more frequent ridership. Only 15 percent mention being required or allowed to work on site as a change that would increase their ridership and another 15 percent note their current needs will not change.



West Puget Sound riders are more likely to say their ridership will increase with changes in COVID-19 risk (58% vs 51%) and being allowed to work on site (17% vs. 12%).

East Puget Sound riders are more to say more frequent service would increase their ridership (33% vs 27%). They are also more likely to say nothing will change their usage (19% vs 12%).

Q7. What, if anything, would have to change for you to increase your Washington State Ferry riding? (Base: FROG/Open 2019 or 2020 Riders)

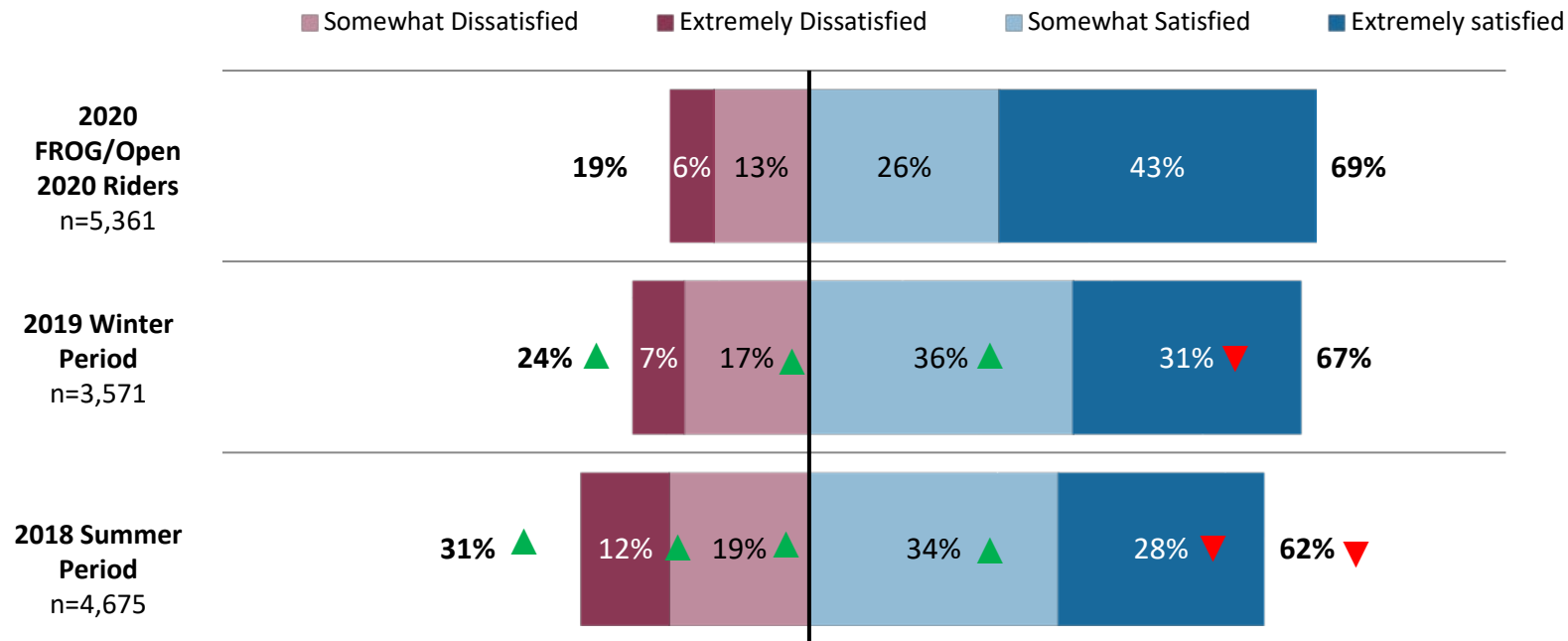
Overall Satisfaction



Overall satisfaction, measured in the fall of 2020, remains steady with satisfaction measured for the Winter Period in 2019 and somewhat higher than Summer 2018.

While satisfaction is steady, dissatisfaction decreased 5 percentage points in 2020 to 19%, from Winter 2019 (24%) and 12 percentage points from Summer 2018 (31%).

Overall Satisfaction with WSF



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown. Ratings of 3 or don't know are not shown. The **bold** percentages represents the corresponding total dis/satisfaction.

▲ = Significantly higher than 2020 Frog/Open

▼ = Significantly lower than 2020 FROG/Open

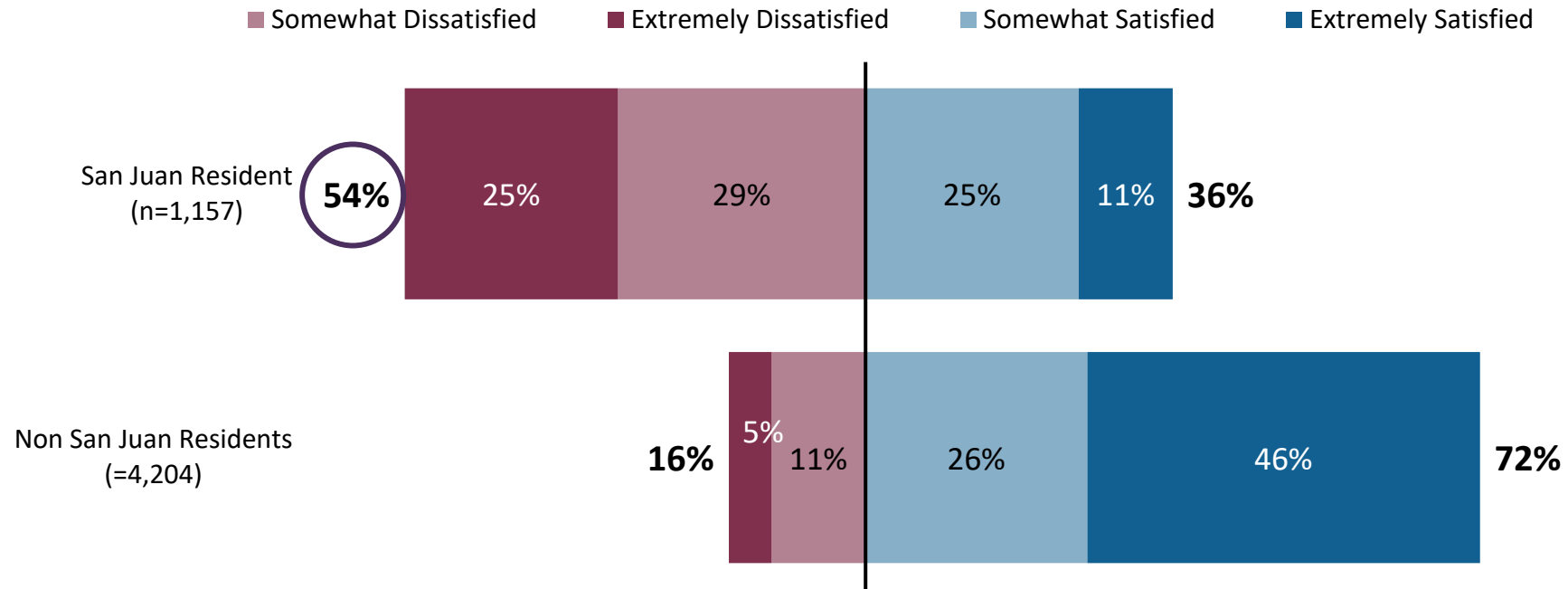
Q1. Thinking of your most recent (INSERT QB2 MOST RECENT SEGMENT RESPONSE) ride on a ferry, all things considered, how satisfied were you with the service provided by Washington State Ferries during the (INSERT QB2 MOST RECENT SEGMENT RESPONSE) period? (Base: FROG/Open 2020 Riders)

Overall Satisfaction – San Juan Residents



Residents of San Juan County are much more likely than other ferry riders to be dissatisfied.

Overall Satisfaction with WSF – San Juan Residents



*Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.
The **bold** percentages represent the corresponding total dissatisfaction/satisfaction*

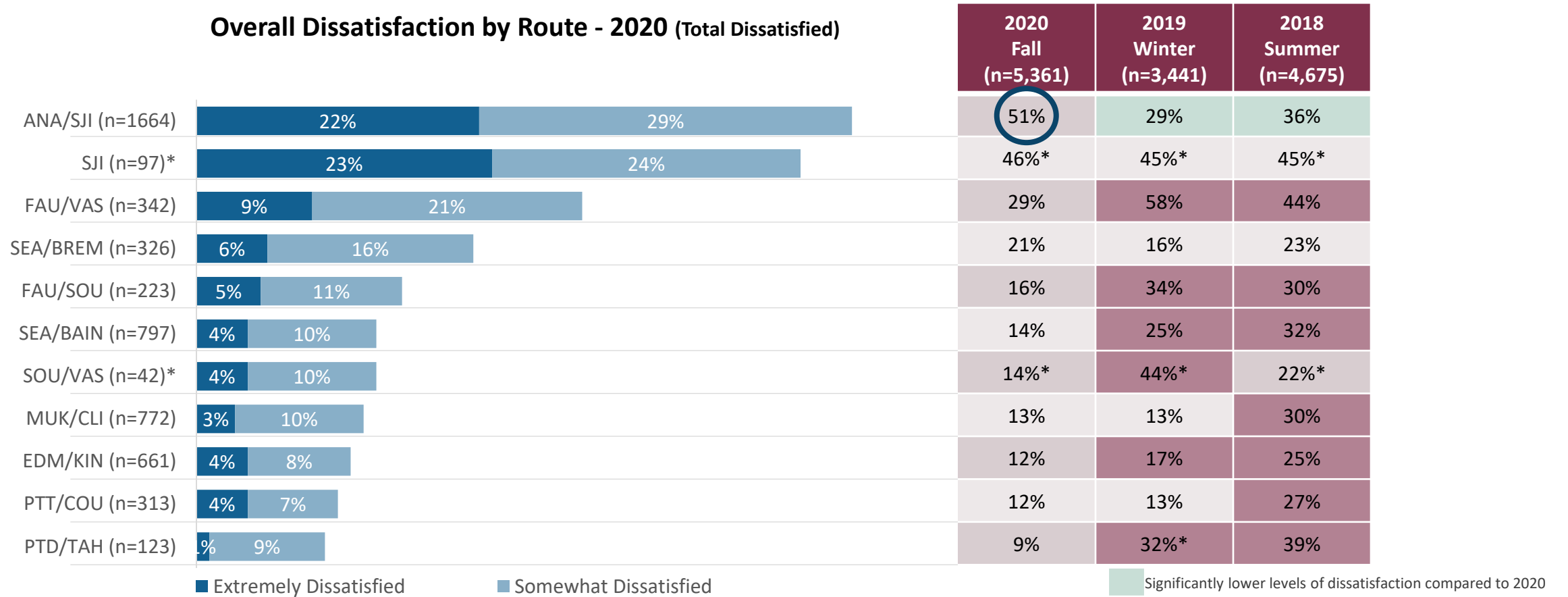
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Overall Dissatisfaction by Route



Most routes saw significantly lower levels of dissatisfaction in 2020 compared to previous studies. The exception includes the Anacortes/San Juan Islands route, which saw an increased number of dissatisfied riders compared to other routes and to Winter 2019 metrics. Seattle/Bremerton (21%) is the only other route with a higher rate of dissatisfaction in 2020 than Winter 2019.

San Juan Inter-island (46%) continues high levels of dissatisfaction, also significantly higher than all other routes, though this is consistent with 2019.



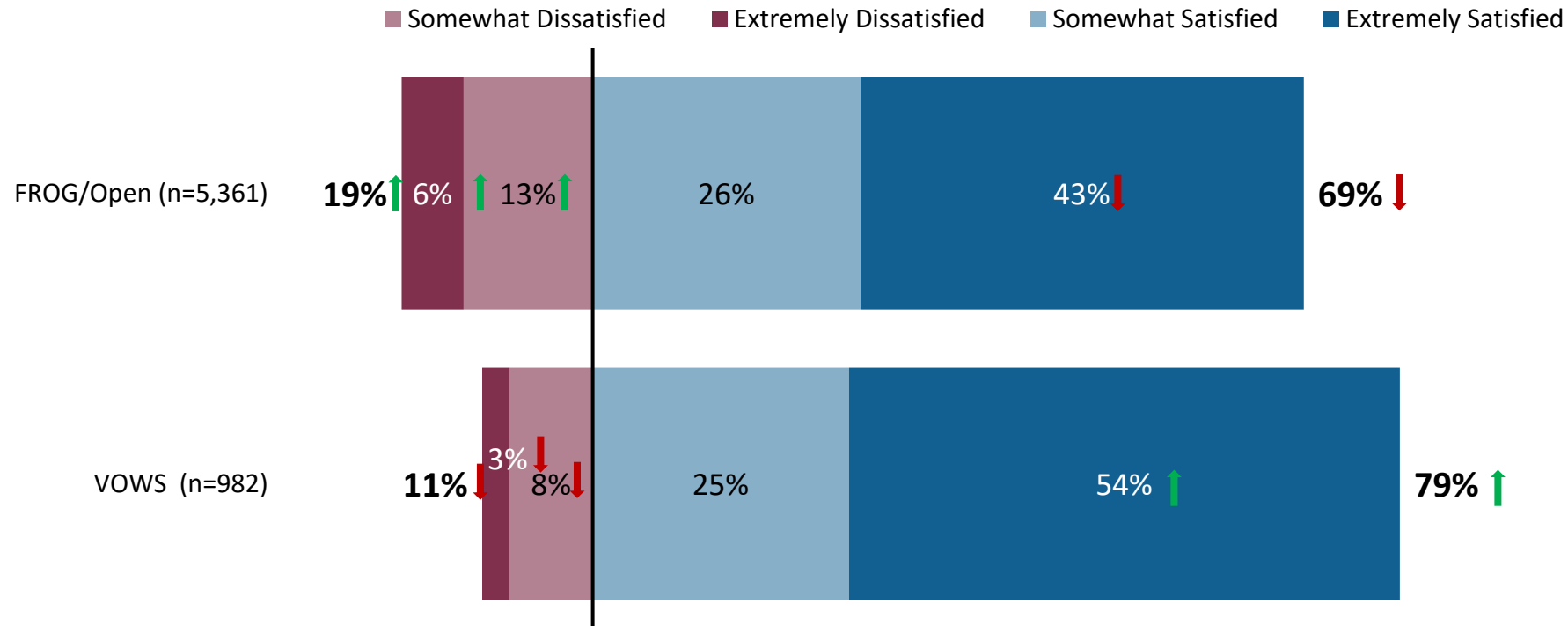
Q1. Thinking of your most recent (INSERT QB2 MOST RECENT SEGMENT RESPONSE) ride on a ferry, all things considered, how satisfied were you with the service provided by Washington State Ferries during the (INSERT QB2 MOST RECENT SEGMENT RESPONSE) period? (Base: FROG/Open 2020 Riders) *Caution small sample size

Overall Satisfaction – By Sample Source



Overall 2020 WSF rider satisfaction is higher among VOWS panelists when compared to FROG/Open-link respondents (79% vs 69%, respectively).

Overall Satisfaction with WSF by Sample Source



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.
 The **bold** percentages represent the corresponding total dissatisfaction/satisfaction

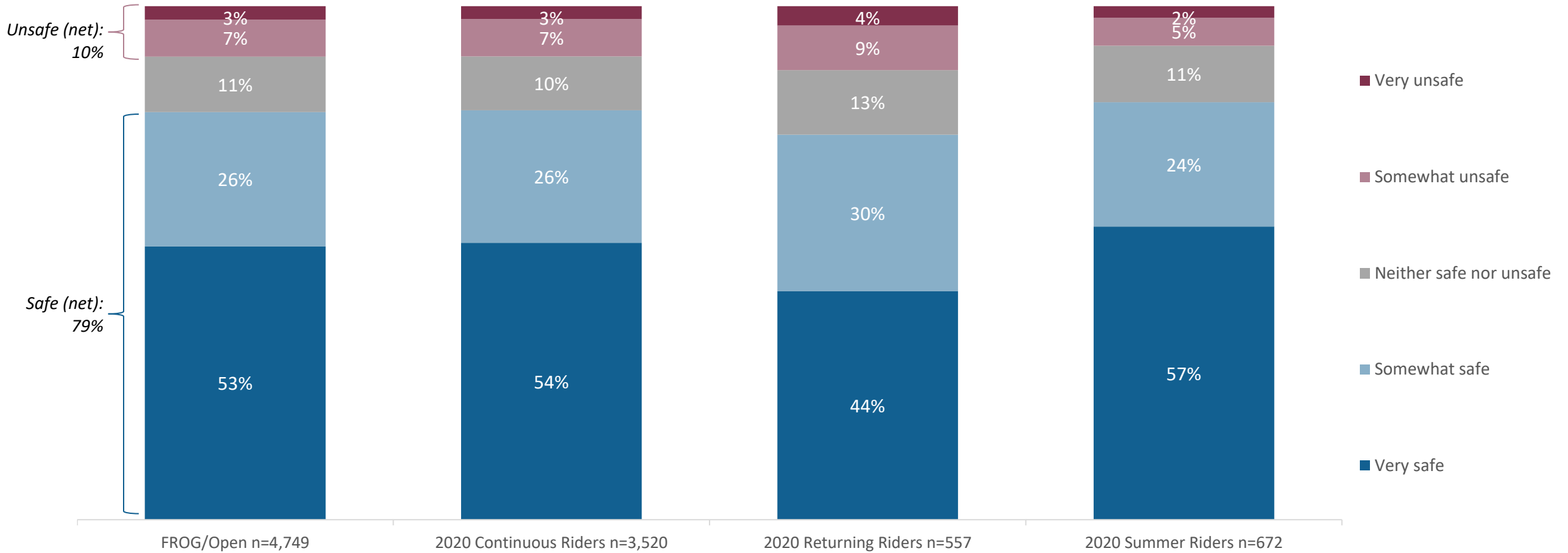
↑ = Significantly higher than other group
 ↓ = Significantly lower than other group

Q1. Thinking of your most recent (INSERT QB2 MOST RECENT SEGMENT RESPONSE) ride on a ferry, all things considered, how satisfied were you with the service provided by Washington State Ferries during the (INSERT QB2 MOST RECENT SEGMENT RESPONSE) period? (Base: FROG/Open 2020 Riders)

Feelings of Health and Safety Riding WSF During the COVID-19 Pandemic



The majority of recent WSF riders felt safe while riding WSF during the pandemic; only one-in-ten felt unsafe.



Q20. Thinking about riding the Washington State Ferries during the COVID-19 pandemic, overall how would you rate your feelings of health and safety while riding the ferry? (Base: FROG/Open 2020 Summer / Fall Riders)

Actions That Would Make Riders Feel Safe



Nearly one-third (31%) of riders who felt less than “very safe” riding WSF say that enforcement of the mask mandate would improve their feelings of safety. Nearly one in eight (12%) say requiring passengers to only leave their car for essential needs would help. The same number (12%) say more frequent cleaning/disinfecting and hand sanitizer would increase feelings of safety.

Actions That Could Make You Feel Safe	Most Recent Route Taken	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	TRIANGLE FA/VA/SO	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
	Respondents	2429	339	134	49*	241	252	113	283	960	58
Enforced mask mandate (properly covering mouth and nose)		31%	32%	36%	37%	26%	35%	24%	26%	34%	33%
Require staying in cars for the trip except for essential needs		12%	10%	10%	12%	12%	12%	26%	12%	14%	13%
More frequent cleaning/disinfecting/have hand sanitizer available		12%	15%	13%	2%	15%	8%	12%	9%	17%	17%
More engaged/better crew		10%	11%	10%	5%	7%	11%	7%	9%	12%	11%
Vaccine/Eliminate COVID-19		6%	5%	2%	7%	6%	5%	12%	5%	6%	7%
Enforce and create systems that support social distancing		4%	8%	5%	2%	5%	2%	3%	1%	5%	4%
Better vehicle loading processes		4%	8%	4%	4%	3%	2%	3%	3%	4%	2%
Allow cross ventilation/Allow outside deck access		4%	4%	4%	7%	5%	4%	3%	2%	3%	2%
Clear guidelines (announcements and signage)		3%	4%	3%	5%	3%	2%	4%	2%	4%	2%
Reliable schedule/Be on time		2%	5%	4%	-	1%	2%	-	0%	4%	9%
Adherence to COVID-19 guidelines (general)		2%	3%	2%	-	2%	1%	2%	2%	3%	2%
Enforce employee mask (properly covering mouth and nose)/ppe mandate		2%	1%	2%	-	1%	3%	2%	3%	3%	4%
Reduce the number of riders/Limit non-essential travel		2%	1%	1%	-	1%	1%	1%	1%	5%	6%
Nothing		38%	30%	40%	36%	39%	42%	37%	48%	29%	30%

Q21A. What, if anything, could be done better to make you feel safe while riding WSF?

Q21B. What, if anything, could WSF do differently to make you feel “very safe”? (Base: FROG/Open 2020 Summer / Fall Riders Giving a Neutral or Unsafe Rating)

*Caution: Small sample size.

Significantly higher than four or more routes

Significantly lower than four or more routes

Implementation and Adherence of COVID-19 Guidelines



More than three quarters (77%) of Summer/Fall riders are satisfied with the implementation and adherence of COVID-19 safety guidelines by WSF and its staff. Just nine percent are dissatisfied, primarily due to employees not abiding by the guidelines or inconsistently enforcing them among passengers. Riders on the Coupeville/Port Townsend and Mukilteo/Clinton routes are more likely to be satisfied, while those on the Seattle/Bremerton and Anacortes/San Juan Islands routes are less likely to be satisfied.

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	4749	646	227	123	576	331	172	33*	260	727	1562	91
Implementation and adherence of COVID-19 safety guidelines	Sat. (4-5)	77%	78%	67% ↓	75%	78%	77%	78%	81%	81% ↑	82% ↑	69% ↓	69%
	Dissat. (1-2)	9%	9%	14% ↑	7%	7%	9%	6% ↓	7%	7%	7% ↓	14% ↑	14%

*Among those routes that have a substantial number of respondents. Caution small sample size
Note: Route show in the last route taken.

↑ = Significantly higher than three or more other groups

↓ = Significantly lower than three or more other groups

Most Recent Route Taken	Example of Verbatim Complaints – (complete sorted verbatim comments in separate document)
Seattle/Bainbridge	<i>Inconsistent announcements on the ferry. If they see a passenger not social distancing or wearing a mask, they don't say anything. Toll booths are inconsistent with sneeze guard and extension credit card reader.</i>
Seattle/Bainbridge	<i>Not enforcing mask requirements, including being sure that people with masks are actually using them to cover their noses and mouths.</i>
Fauntleroy/Southworth	<i>I saw numerous people walking around not wearing masks, saw numerous law enforcement and ferry personnel and saw NO attempt to enforce mask wearing requirements.</i>
Anacortes/San Juan Island	<i>Whenever I go upstairs on the ferry (however briefly) there are plenty of people without masks, and no one makes an attempt to ask them to wear one.</i>
Anacortes/San Juan Island	<i>The rules are generally not enforced in the cabin. Many of the WSF staff choose not to abide by the rules, i.e. mask and distance. I have seen little effort to get passenger compliance.</i>
Anacortes/San Juan Island	<i>Employees take off masks when in the main cabin and talk to each other loudly. The workers when loading the lot often don't have masks, workers on the boats have masks below their noses. Very lax!</i>
San Juan Inter-Island	<i>Friday Harbor worker not wearing a mask, ferry worker not wearing a mask, unmasked ferry worker talking with a passenger within 2ft of the passenger.</i>

Q22A. How satisfied are you with the implementation and adherence of COVID-19 safety guidelines by Washington State Ferries and its staff? (Base: FROG/Open 2020 Summer/Fall Riders) *Caution small sample size.

Q22B. Why do you say you are [less than satisfied] with WSF's efforts regarding COVID-19 safety guideline compliance and adherence? (Base: Those Giving A Neutral/Dissatisfied Rating)

Enforcement of COVID-19 Guidelines Among Passengers



One-in-seven Summer/Fall riders (14%) are dissatisfied with the enforcement of COVID-19 safety guidelines among ferry passengers. As noted elsewhere in the report, mask mandate enforcement is the top request of riders who do not feel safe riding during the pandemic. Lack of enforcement is also among the reasons given for overall dissatisfaction with their recent WSF ride.

The Coupeville/Port Townsend and Mukilteo/Clinton routes receive the best marks for enforcement of COVID-19 safety guidelines.

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	4749	646	227	123	576	331	172	33*	260	727	1562	91
Enforcement of COVID-19 safety guidelines	Sat. (4-5)	62%	63%	54% ↓	61%	63%	61%	62%	57%	68%	67%	51% ↓	58%
	Dissat. (1-2)	14%	16% ↑	21% ↑	13%	11% ↓	14%	10% ↓	9%	12% ↑	11% ↓	24% ↑	22% ↑

*Among those routes that have a substantial number of respondents. Caution small sample size
 Note: Route show in the last route taken.

↑ = Significantly higher than three or more other groups

↓ = Significantly lower than three or more other groups

Most Recent Route Taken	Example of Verbatim Complaints – (complete sorted verbatim comments in separate document)
Seattle/Bremerton	<i>I've seen plenty of people wearing masks around their necks when they're in close proximity to other passengers and a ferry employee walks right past without saying a word.</i>
Seattle/Bainbridge	<i>Many riders take their face masks off upon finding a seat in the cabin and ride the entire trip unmasked in the enclosed space. I have seen ferry workers walk right past without saying anything. As a health care worker, this lack of enforcement directly informs my decision to not take the ferry for personal travel, limiting myself to work trips alone.</i>
Anacortes/San Juan Islands	<i>People are constantly hanging/walking around their cars (when waiting in line) without masks. Announcements should be made, and signs should be present about mask requirements even while outside in line. Also, masks should be kept ON the entire time they are upstairs in ferry cabins.</i>
Anacortes/San Juan Islands	<i>Guidelines are only recommended, not enforced. Staff cannot enforce compliance, appropriate transit officers/officials are needed.</i>

Q22C. How satisfied are you with the efforts of Washington State Ferries staff regarding the enforcement of COVID-19 safety guidelines (face mask and social distancing/reduced occupancy measures, etc.) among ferry passengers? (Base: FROG/Open 2020 Summer/Fall Riders) *Caution small sample size.

Q22D. Why do you say you are [less than satisfied] with WSF's efforts enforcing the COVID-19 safety guidelines among ferry passengers? (Base: Those Giving A Neutral/Dissatisfied Rating)

Most Recent Trip - Route



The most commonly ridden route for the most recent trip tend to be either the Mukilteo/Clinton, Edmonds/Kingston, or Seattle/Bainbridge routes, regardless of ridership group. The exception is the 2020 Discontinued Riders who are more likely than any other segment to cite the Seattle/Bremerton route.

	Total FROG/Open n=5,689	2020 Continuous Riders n= 3,670	2020 Discontinued Riders n=462	2020 Returning Riders n=557	2020 Summer Only Riders n=672	2019 Only Riders n=328
Mukilteo / Clinton	21%	25%	10%	14%	17%	17%
Edmonds / Kingston	21%	19%	19%	23%	30%	17%
Seattle / Bainbridge	19%	16%	33%	26%	16%	26%
Anacortes / San Juan Islands	10%	10%	4%	9%	13%	8%
Fauntleroy / Vashon	8%	11%	2%	5%	4%	5%
Seattle / Bremerton	7%	5%	18%	8%	6%	10%
Point Defiance / Tahlequah	5%	6%	-	5%	2%	4%
Fauntleroy / Southworth	4%	3%	8%	4%	4%	8%
Coupeville / Port Townsend	4%	3%	5%	5%	7%	4%
Southworth / Vashon	1%	1%	2%	-	1%	-
San Juan Inter-Island	1%	1%	0%	1%	1%	0%
Anacortes / Sidney B.C.	0%	-	-	-	-	1%

Note: Less than 0.5% rounds to 0%

Significantly higher than three or more groups
 Significantly lower than three or more groups

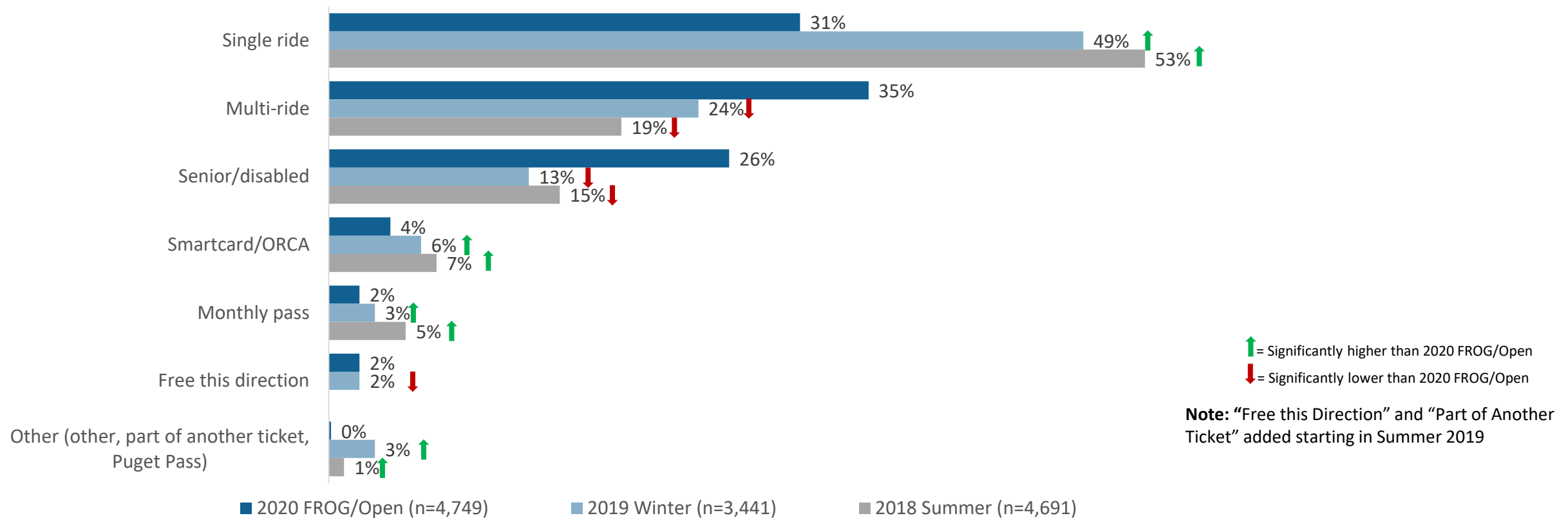
Q2A. What was the most recent Washington State Ferries route that you rode? (Base Total FROG/Open 2019 or 2020 Riders)

Most Recent Trip –Ticket Type



A majority of Summer/Fall 2020 riders were single ride (31%), or multi-ride (35%) followed by senior/disabled (26%). Compared to 2019 Winter the proportion of single ride tickets dropped significantly while the proportion rose in both multi-ride and senior/disabled. Even fewer riders reported using an ORCA card (4%) or monthly pass (2%).

Most Recent Trip Ticket Type



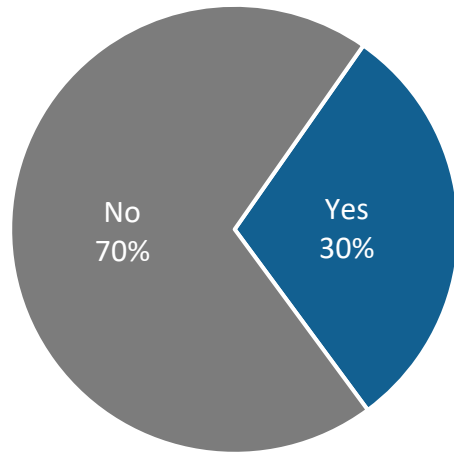
Q19. Finally, thinking about your LAST FERRY RIDE ONLY on the {most recent} route, on what kind of ticket were you traveling? (Base: FROG/Open 2020 Summer/Fall Riders)

Awareness and Impact of Suspended No-Show Fees



Few report taking advantage of the no-show fee suspension and increasing the number of reservations made for the same day.

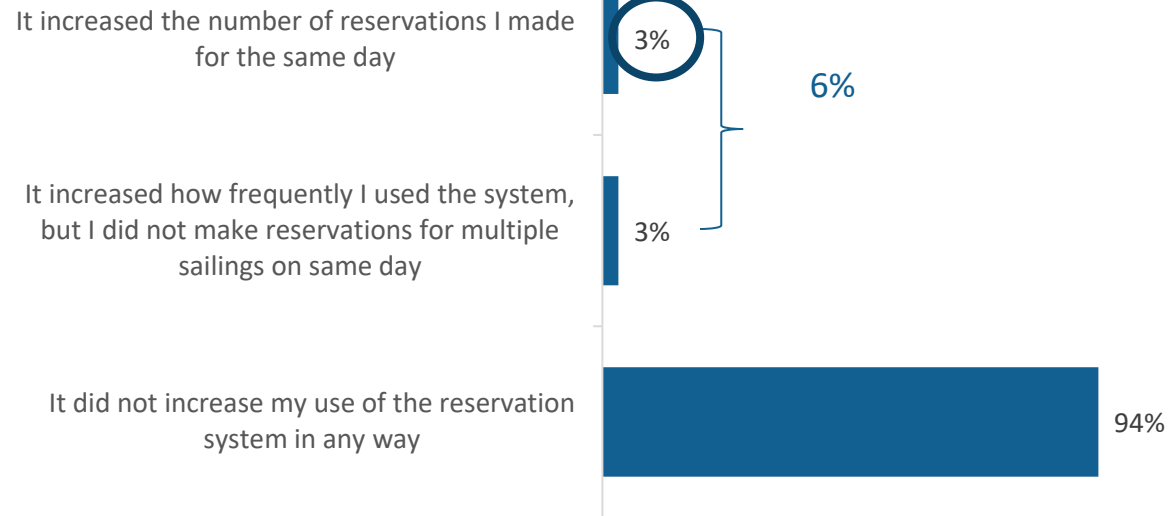
Aware of No-Show Fee Suspension



Total FROG/Open Summer/Fall 2020 Riders
n=4,749



Impact of No-Show Fee Suspension



FROG/Open Summer/Fall 2020 Riders Aware of Fee Suspension n=1,853

Those who reside on the west side of the Puget Sound are more likely to be aware of the suspended fees (35% vs. East 25%).

Those on the eastside are more likely to have not used the system since March (53% vs. 45%).

Looking only at those whose most recent route was a reservation route (n679), awareness of the no-show fee suspension increases to 55% aware.

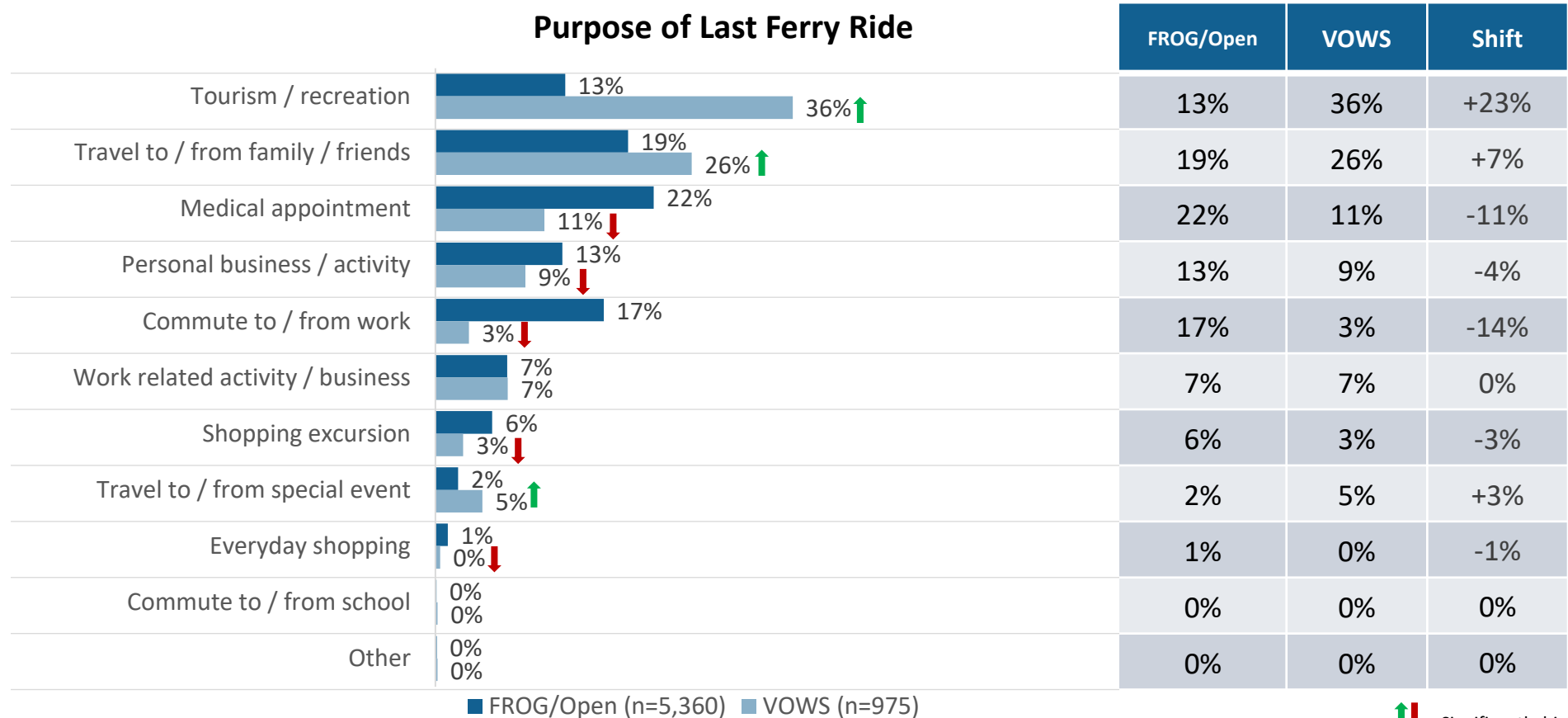
Q32. Did you know that WSF suspended no-show fees for reservations between March and September 30, 2020? (Base: Total FROG/Open Summer/Fall 2020 riders)

Q33. Did the lack of no-show fees increase the number of reservations you made for a particular route or how frequently you used the reservation system? (Base: FROG/Open Summer/Fall 2020 Riders Aware Of No-show Fee Suspension and Used it Since March)

Purpose of Last Ferry Ride



Riders sourced from VOWS are more likely than those sourced from FROG or the open link to report “casual” reasons for ridership. They are significantly more likely to travel for tourism/recreation, travel to visit friends/family, and travel for special events, and are less likely to travel for “daily activities”, including medical appointments, personal business, commuting and shopping.



↑↓ = Significantly higher or lower than FROG/OPEN
Ranked in order of total mentions

Q2B. Thinking about your LAST FERRY RIDE ONLY on the (INSERT Q2A) route, which of the following was the PRIMARY PURPOSE for that specific trip? (Base: Total 2020 Riders Who Recall Most Recent Route)

Sample Source Comparison Summary



When comparing respondents from VOWS and the open-link to the FROG panel respondents, we find the following differences:

VOWS

Key differences compared to the FROG panel:

Open Link Sourced

Key differences compared to the FROG panel:

Demographics

Respondents skew male, are more ethnically diverse, are more likely to be employed full-time or unemployed, have lower levels of education and income, and include a higher representation of riders from the eastside of Puget Sound.

Respondents who participated through the open link skew female and are younger (59 vs. FROG at 63 years old).

Ferry Usage

Less frequent and more casual riders who are riding less often in 2020.

More likely to be unsure about their future short-term usage of the ferries and more likely to say that there are **no changes** that can be made which will increase their ridership.

More likely than FROG panelists to report their most recent trip was walk-on and less likely to be vehicle driver. More likely to be a single-ride, ORCA or monthly pass fare and less likely to be a senior fare.

Open link riders are more likely to be looking for increased frequency and lowered wait times. They also want lower fares in order to increase their ridership and are less likely to be waiting for lowered COVID-19 risk.

East vs. West Comparison



The following reflects the comparative differences between those who live on the eastside of Puget Sound versus those who live on the westside of Puget Sound.

East Puget Sound

West Puget Sound

Demographics

Employed full-time, with higher levels of college graduates and higher incomes.

Older and more likely to be retired, with lower levels of income.

Ferry Usage

Casual or infrequent riders. More likely to have last traveled for recreation, and more likely to have driven on.

Timeliness of the boats is more of a reason for dissatisfaction and eastside riders are more likely to say an increased schedule frequency would increase their ridership.

More likely to be Discontinued or Returning riders and to have most recently traveled for medical reasons, or to commute for work. Reported higher usage of WSF pre-pandemic but report lower current and expected usage in the future near term.

More likely to cite lack of rule enforcement, restrictive COVID practices that inhibit the experience, concerns with the fare, and cleanliness issues as reasons for dissatisfaction.

Satisfaction scores for all four-performance metrics (COVID-19 guidelines implementation and enforcement and enhanced sanitation of terminals and vessels) are significantly lower with this group.

More frequent cleanings would have a bigger effect on westside riders to help them feel safer. A reduction in COVID-19 risk or being allowed to work on site are more likely changes that will increase usage from those in the west.



Ridership will eventually return to previous levels, though not any time soon.

Ridership is predicted to pick up beginning in April 2021 and continue through July of 2021.

Even after the rebound, there will continue to be some depression in total ridership – most likely between 10% and 20%.

Ridership return:

- One-in-three (34%) riders who are currently taking fewer trips are uncertain when their pre-pandemic riding levels will return.
- Only six percent believe that their ridership levels will never increase.
- Riders of the Seattle/Bremerton, Fauntleroy/Southworth, and Coupeville/Port Townsend routes anticipate a quicker return to normal ridership levels.
- Riders on the Point Defiance/Tahlequah route, followed by the Anacortes/San Juan Islands route, are more likely to express uncertainty.
 - It should be noted that residents of San Juan county are less likely to expect this return before July than those who reside elsewhere (33% vs. 40%, respectively), and are more likely to be unsure about the timing of this return (41% vs 34%, respectively).



THANK YOU!

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