



Washington State Transportation Commission

Ferry Riders' Opinion Group

2023 Winter WSF Performance Survey Results

May 2023



Washington State
Transportation Commission



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 allows for data to be collected over time to understand how reactions to key issues and operations are changing.

This report is the 2023 WSF Winter Ferry Performance Study with a target audience of January through March 2023 ferry riders. This audience was sampled from the FROG panel, by an open link publicized via WSF communications which include rider alerts, as well as by website, newsletter, and social media posts.

While this research is typically conducted annually, due to the COVID-19 pandemic this research did not take place for winter 2020.



- ▶ Online survey with respondents from:
 - Ferry Riders Opinion Group (FROG) panel,
 - Open survey link publicized via WSF communications including rider alerts. *Note that the results included herein only include respondents from the FROG panel, to ensure comparability to past years.

- ▶ Conducted March 27 to April 17, 2023, regarding respondents' personal experience riding Washington State Ferries during the 2023 winter travel period (January through March 2023).

- ▶ A total of 3,953 interviews were completed with January-March 2023 WSF riders.

- ▶ Data was weighted to reflect WSF actual ridership January 1 - March 31, 2023, by route, boarding method and ticket type used, based on the last trip taken.



Ridership Route, Mode, & Trip Purpose – Continued Pandemic Impact

Summary



RIDERSHIP

Ridership is increasing; however, pandemic effect still observed for mode and trip purpose.

Route:

Route mix similar to that in 2019 (pre-pandemic) with one exception.
Seattle/Bremerton ridership significantly down (7%-points from 2019).

Purpose:

Visiting family/friends (21%) and medical appointments (18%) remain the most common purposes for the most recent trip taken.
Work commuting (13%) while rising, is still below pre-pandemic levels of 19% in 2019.

Boarding Method:

The proportion who drove on as a driver or passenger for their most recent ferry trip in winter 2023 is similar to 2022 and significantly higher than 2019.
Walk on ridership continues to rebound compared to 2021 but remains significantly lower than 2019.

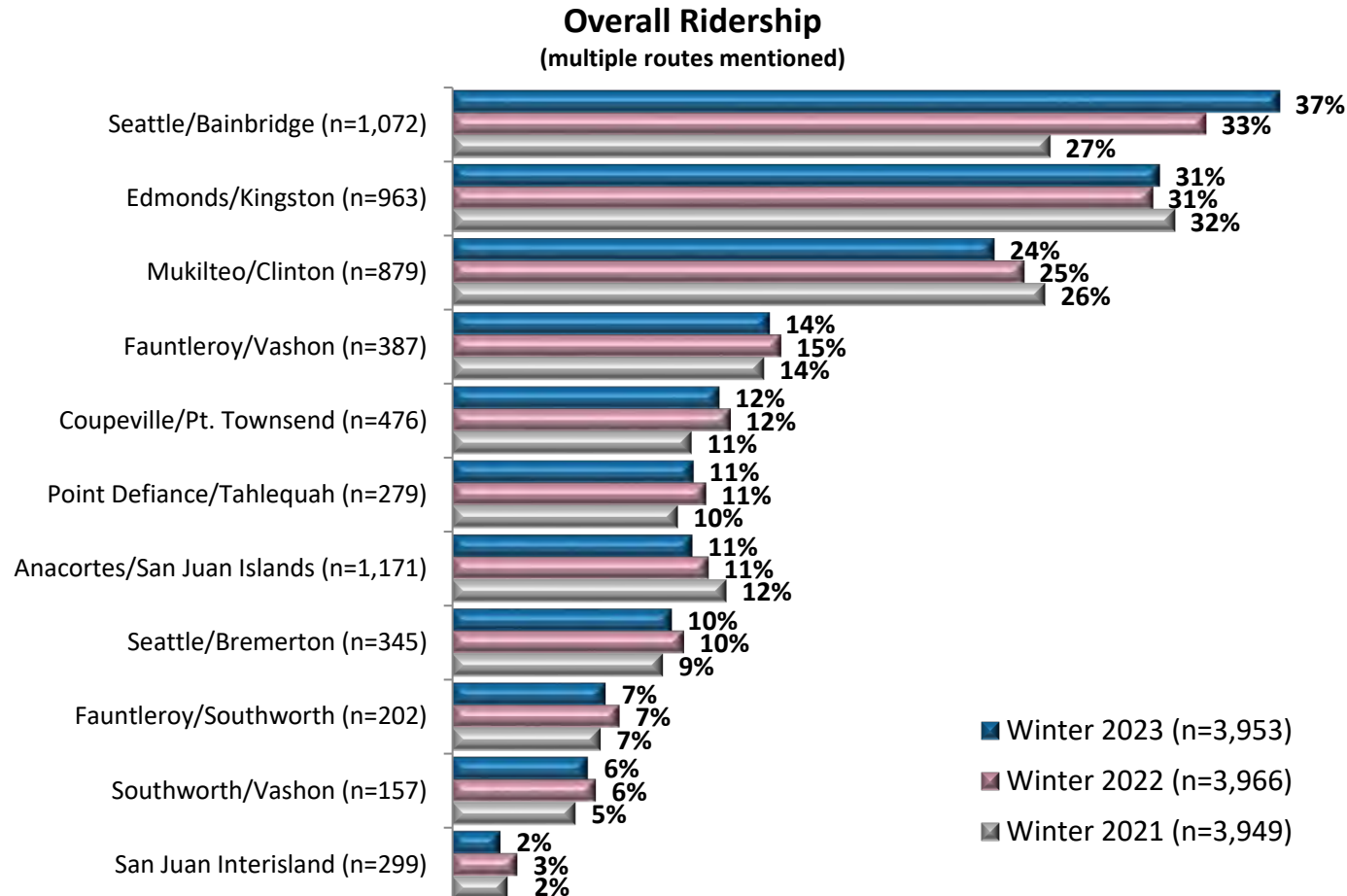
Ticket Type:

Winter 2023 shows a significant decrease in those traveling on a single ride ticket (45%, down 5%-points) and an offsetting increase in those traveling on a multi-ride ticket (28%, up 5%-points).

Ridership Route



Ridership on the Seattle/Bainbridge route rose four points in winter 2023 to a high of 37%, significantly higher than in 2022-33% and 2021-27%, and bringing it to levels comparable to 2019-39%. Ridership on other routes remained relatively steady comparing the last three years, with no significant changes. There has been a notable drop-off in ridership on the Seattle/Bremerton route (10%) compared to 2019 (18%), but other routes are on par with their 2019 levels.



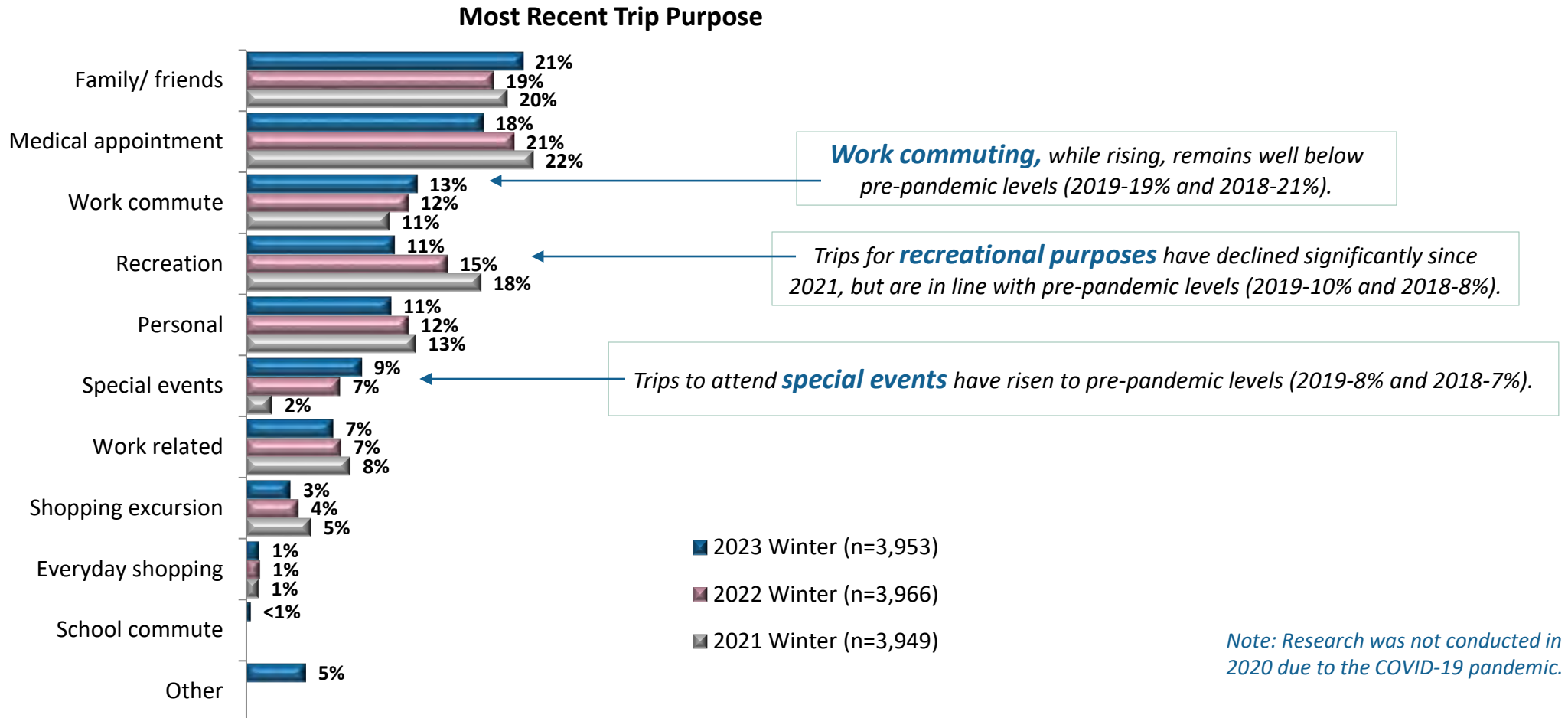
Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Q2. Which of the following route(s) have you ridden for any purpose January through March 2023? [CHECK ALL THAT APPLY]

Most Recent Trip – Purpose



Visiting family/friends (21%) and medical appointments (18%) remain the most common purposes for the most recent trip taken, with around one in five mentioning them. The proportion of trips for visiting family/friends has remained relatively steady over time. The proportion of trips for medical appointments has declined somewhat since 2021, but is still above pre-pandemic levels (2019-15% and 2018-14%). Other shifts are noted below.



Q15. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, which of the following was the PRIMARY PURPOSE for that specific trip?

Most Recent Trip – Boarding Method/Vehicle Type

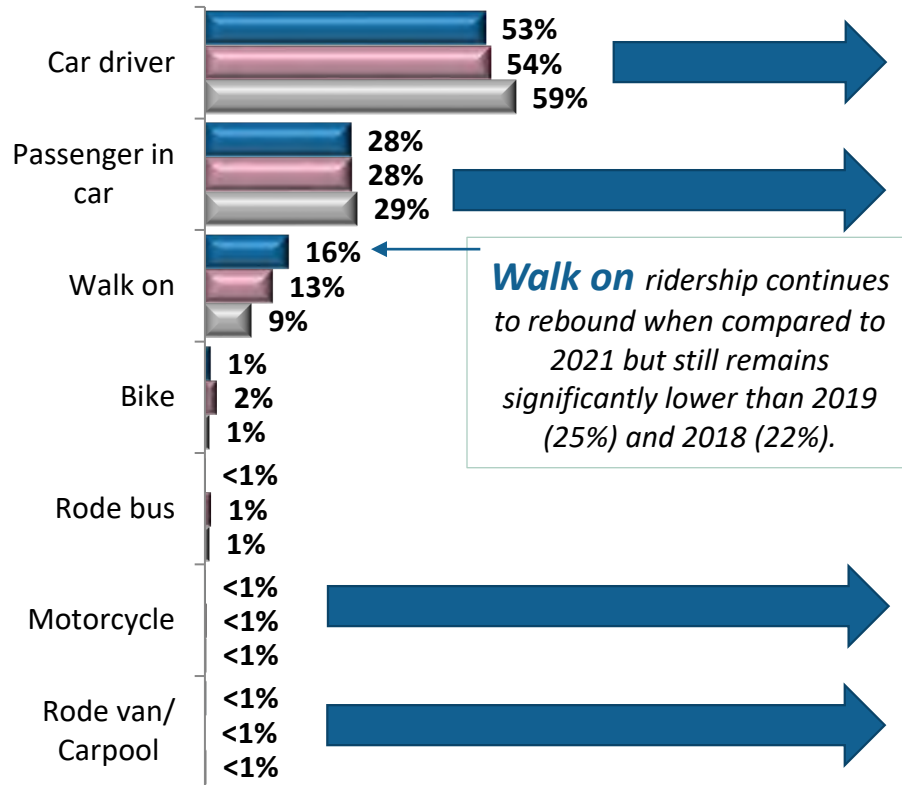


The proportion who drove on as a driver or passenger for their most recent ferry trip in winter 2023 (81%) is similar to 2022 (82%), down slightly from 2020 (88%), but significantly higher than 2019 (69%).

Among those who did drive on, close to nine in ten (86%) were in a regular-sized vehicle that was 14 to 21 feet long.

Most Recent Trip

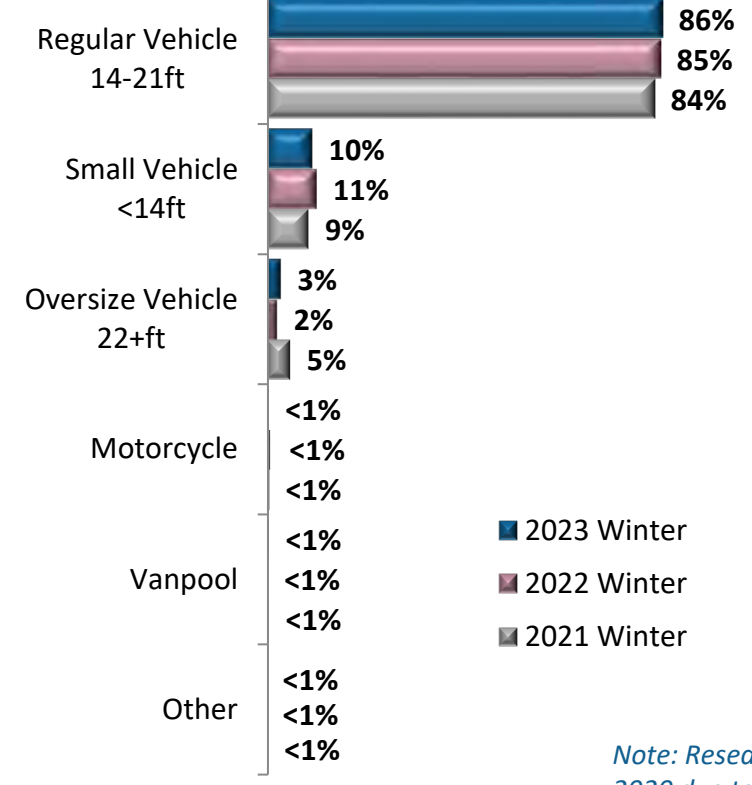
Outbound Boarding Method



Walk on ridership continues to rebound when compared to 2021 but still remains significantly lower than 2019 (25%) and 2018 (22%).

Walk-on & Work Commuter
The number of walk-on riders who are commuters remains low at only 26% (of all walk-ons). This compares to 43% of walk-ons in 2019 being a work commuter.

Trip Vehicle Type



Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

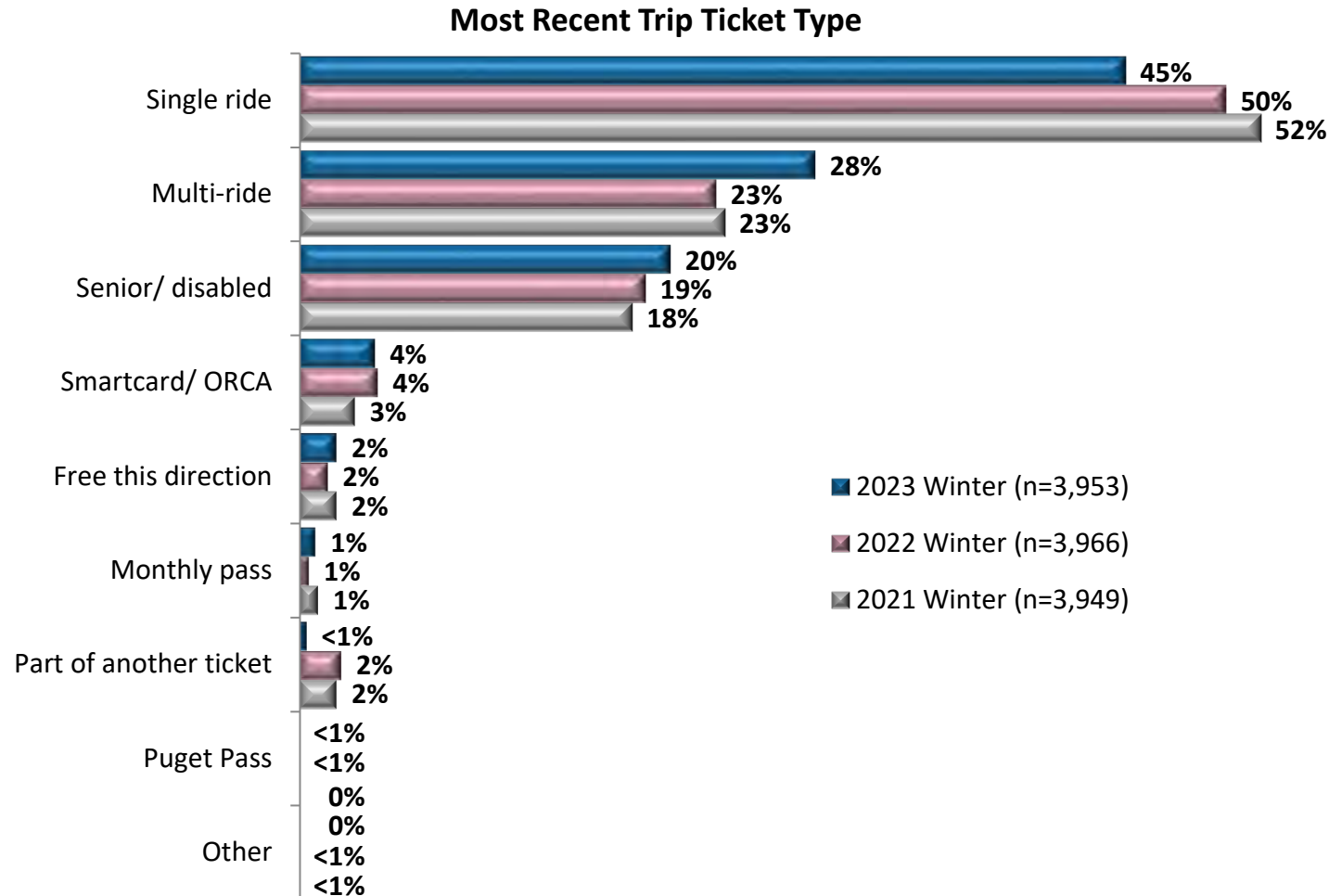
Q16a. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, how did you board the ferry for your outbound trip?

Q17. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, which of the following best describes the vehicle you drove on the ferry?

Most Recent Trip – Ticket Type and Purchase



Winter 2023 shows a significant decrease in those traveling on a single ride ticket and an offsetting increase in those traveling on a multi-ride ticket. A majority of January to March riders report using a single ride (45%) or multi-ride (28%) ticket. Winter 2023 continues a pattern of a higher proportion of riders using a senior/disabled ticket – one in five (20%) compared to one in eight (13%) in 2019 and 2018.



Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Q19. Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, on what kind of ticket were you traveling?



Overall Satisfaction and Value

Satisfaction



OVERALL SATISFACTION

Overall satisfaction with the service provided by WSF increased significantly in 2023.

Overall:

Overall satisfaction ('extremely satisfied' plus 'somewhat satisfied') was 58% in 2023, up from 39% in 2022, and closer to the 68% in 2021.

About a third (35%) of respondents were *dissatisfied* overall (23% somewhat dissatisfied, 12% extremely dissatisfied). That is a 19-point decrease from 2022 where 54% were dissatisfied.

Overall Satisfaction By Route:

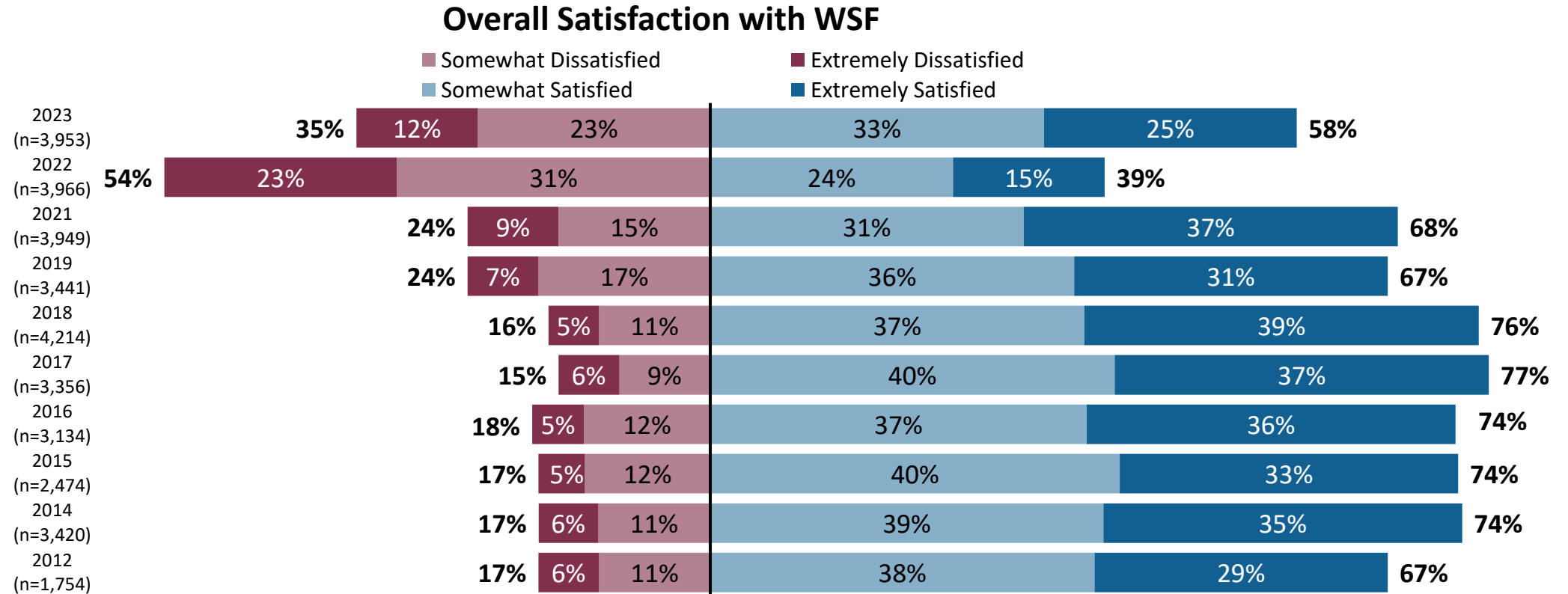
Riders of the San Juan Inter-Island (67%) route have a significantly higher level of dissatisfaction compared to most other routes, followed by riders of the Fautleroy/Vashon (55%), Anacortes/San Juan Islands (50%), and Southworth/Vashon (49%) routes.

Eight of the eleven routes show a notable decrease in percent of dissatisfied riders compared to 2022, especially Mukilteo/Clinton.

Overall Satisfaction



Overall winter 2023 satisfaction at 58% is significantly higher than ratings for 2022 (39%). Only about a third express at least some dissatisfaction with their experience overall, down significantly from over half who did so in 2022.



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

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

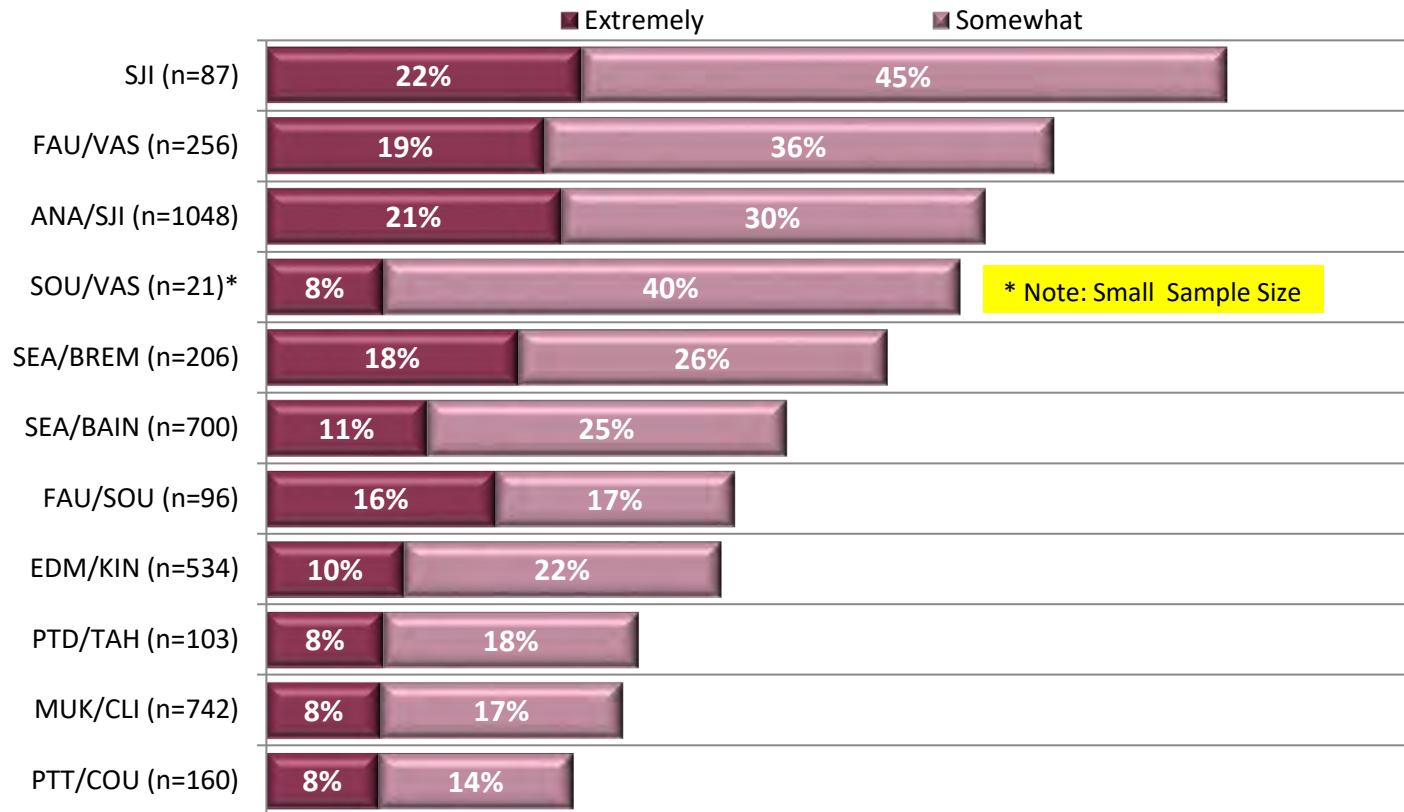
Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during January through March 2023 only. All things considered, how satisfied are you with the service provided by Washington State Ferries from January through March 2023?

Overall Dissatisfaction by Route



Riders of the San Juan Inter-Island (67%) route have a higher level of dissatisfaction compared to other routes, followed by riders of the Fautleroy/Vashon (55%), Anacortes/San Juan Islands (50%), and Southworth/Vashon (49%*) routes. Eight of the eleven routes show a notable decrease in percent of dissatisfied riders compared to 2022, especially Mukilteo/Clinton.

Overall Dissatisfaction by Route - 2023 (Total Dissatisfied)



2023	2022	Shift ('23 vs '22)	2021
67%	46%	+21%	49%
55%	56%	1%	27%
50%	53%	3%	43%
49%*	38%*	+11%	24%*
43%	49%	6%	20%
36%	47%	11%	26%
33%	29%	+4%	20%
32%	55%	23%	21%
26%	40%	14%	17%
25%	74%	49%	20%
21%	37%	16%	9%

Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during January through March 2023 only. All things considered, how satisfied are you with the service provided by Washington State Ferries from January through March 2023?



OVERALL VALUE

Riders' perceived level of value in the service WSF provides shows some improvement.

Overall Value:

Systemwide, just over half (52%) of riders say that WSF is a good value, up a couple of points from 50% in 2022. In comparison, 13% rate WSF a poor value, down from 17% who did so in 2022.

Value By Route:

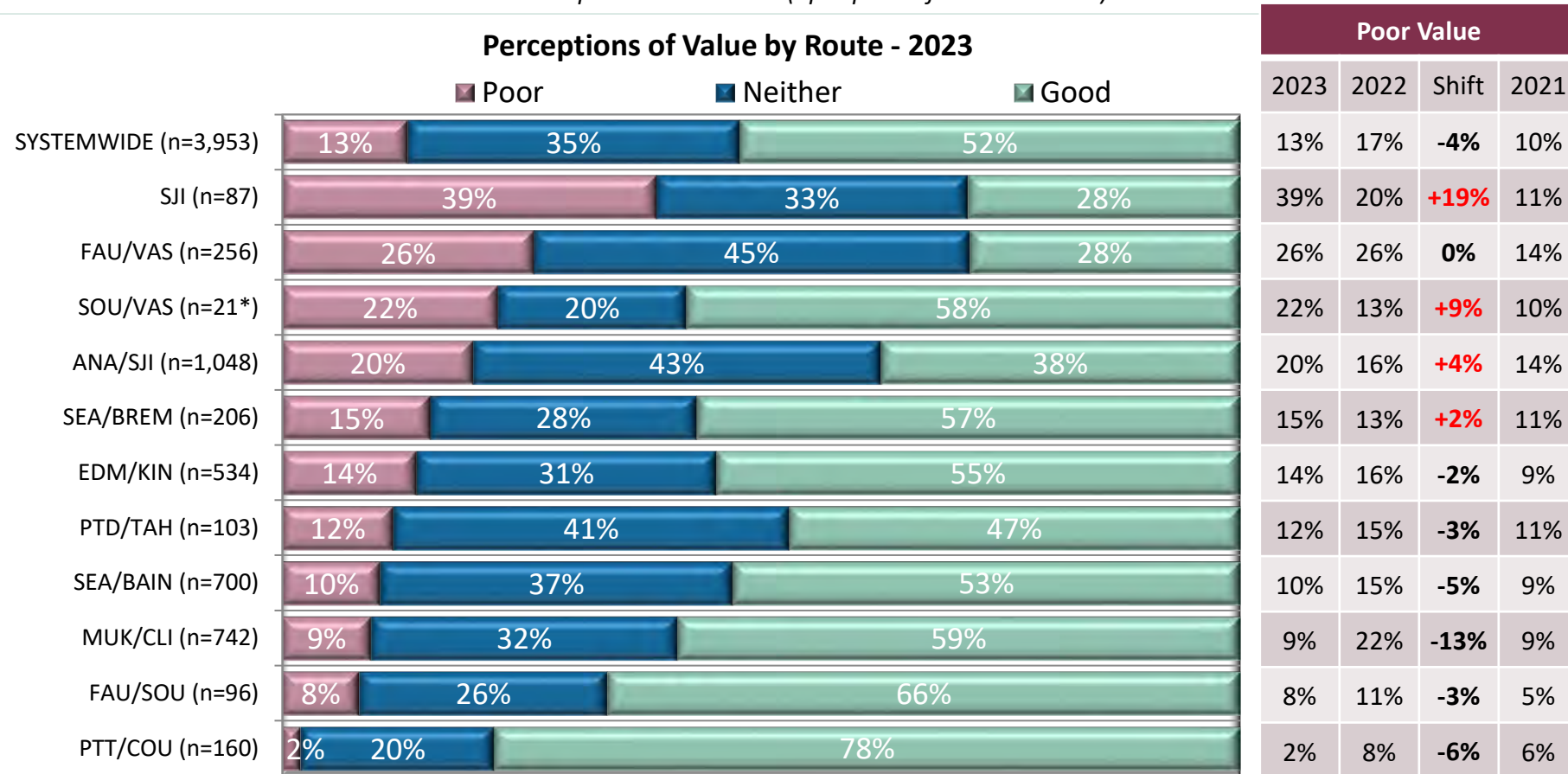
Good value: The routes most likely to be rated a “good value” by riders in winter 2023 include Coupeville/Port Townsend (78%), Fauntleroy/Southworth (66%), and Mukilteo/Clinton (59%).

Poor value: The routes most likely to be rated a “poor value” by riders in winter 2023 include San Juan Inter-Island (39), Fauntleroy/Vashon (26%), and Southworth/Vashon (22%).

Perceived Good Value by Route



Systemwide, just over half (52%) of riders say that WSF is a good value (down from 59% in 2021 but up a couple of points from 2022 at 50%). In comparison, 13% rate WSF a poor value, down from 17% in 2022. Improvements in terms of perceived value can be seen on six of the routes (fewer rating it 'poor'), with Mukilteo/Clinton showing the most improvement. San Juan Inter-Island riders were more likely to rate WSF a poor value at 39% (higher than 2022-20% and 2021-11%). Southworth/Vashon also saw a notable increase in riders rating it a poor value at 22% (up 9-points from 2022-13%).



Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Q116. Considering your personal experience with the ferries, which of the following phrases best describes the value, to you, of riding Washington State Ferries to you?



Key Drivers of Satisfaction

Key Drivers – Overall Rating for Dissatisfaction



Regression analysis informs the extent to which each measured touchpoint influences overall satisfaction. This analysis shows that having on-time/dependable departures is the key driver of overall satisfaction, with over half (55%) of overall satisfaction explained by on-time/dependable departures. This is more than four times higher than the next most impactful touchpoint (loads ferries to capacity).

	Attributes	Beta Coefficient			
		2023	2022	2021	2019
27	WSF has on-time/dependable departures	55%	49%	39%	44%
15	Loads ferries to capacity	13%			
12	Efficiently processes vehicles through ticket lanes	12%			
5	WSF and transit schedules coordinated		15%	20%	
6	Adequate parking near terminals		10%		
7	Easy loading/unloading for walk-on			37%	
1	Terminals are clean			15%	
26	Dock-side holding areas fully utilized				16%
24	Vessel crew is helpful				15%

- ❖ The top key driver of overall dissatisfaction is consistent over the past four tracking periods: *WSF has on-time/dependable departures*.
- ❖ Two new key drivers of satisfaction for 2023 are *loads ferries to capacity* and *efficiently processes vehicles through ticket lanes*.
- ❖ *On-time/dependable arrivals* satisfaction levels are highly correlated with the departure satisfaction, so on-time arrival is a secondary driver of satisfaction.

The higher the beta coefficient the stronger the influencer on overall dissatisfaction. The R squared measures the extent to which the touchpoints fully capture all key drivers for satisfaction.

2023 R2 = .46
 2022 R2 = .37
 2021 R2 = .41
 2019 R2 = .35

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Dependent variable: Q1. All things considered, how satisfied are you with the service provided by Washington State Ferries from January through March 2023? Model run on unweighted data. Regression explanation can be found in the appendix.

On Time Arrivals and Departures



ONTIME AND DEPENDABLE DEPARTURES AND ARRIVALS

On-time/dependable departures and arrivals continue to be the areas of highest dissatisfaction, though improvements have been noted and *dissatisfaction has declined on the majority of routes.*

On-time/Dependable Departures:

Systemwide, about a third (35%) are *dissatisfied* with the timeliness of departures, and about two fifths (42%) are satisfied. This is a significant improvement over winter 2022 where 49% were dissatisfied and 31% satisfied.

- The most dramatic decrease in departure dissatisfaction is for the Mukilteo/Clinton route (25%, down from 70% in winter 2022). The San Juan Inter-Island (76%), Fauntleroy/Vashon (62%), and Anacortes/San Juan Islands (61%) are the routes with the highest departure dissatisfaction.

On-time/Dependable Arrivals:

Systemwide, about a third (34%) are *dissatisfied* with on-time/dependable arrivals, and over two fifths (44%) are satisfied. This is a significant improvement over winter 2022 where 46% were dissatisfied and 34% satisfied.

- The most dramatic decrease in arrival dissatisfaction is for the Mukilteo/Clinton route (23%, down from 68% in winter 2022). The San Juan Inter-Island (76%), Anacortes/San Juan Islands (62%), Fauntleroy/Vashon (61%), and Southworth/Vashon routes show the highest arrival dissatisfaction.

Passenger Frustrations:

Passenger comments make it clear that scheduling issues continue to be a concern. More than two in five (43%) responders offered comments about the schedule issues when asked for additional thoughts at the end of the survey – this is up from 39% in 2022 and two and a half times the level of mentions in 2019 (17%).

On Time Departures

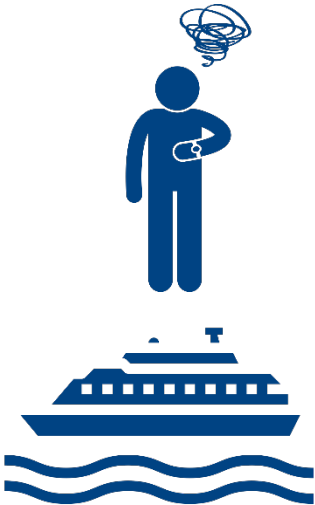


Winter 2023 saw significant improvement where on-time departure dissatisfaction is concerned, with a fourteen-point drop in dissatisfaction overall, and a forty-five point drop for the Mukilteo/Clinton route. While dissatisfaction levels on most routes are still relatively high, these improvements should be recognized, (although three routes did see an increase in dissatisfaction). The San Juan Inter-Island (76%) and Anacortes/San Juan Islands (61%) routes continue among the routes with the highest departure dissatisfaction.

Dissatisfied riders were most often dissatisfied with both eastbound and westbound 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		3953	700	206	103	534	256	96*	21*	160	742	1048	87*
WSF has on-time/dependable departures	Sat. (4-5)	42%	34%	51%	40%	56%	20%	55%	18%	74%	52%	18%	6%
	Dissat. (1-2)	35%	40%	27%	33%	22%	62%	24%	53%	11%	25%	61%	76%
2022	Dissat.	49%	44%	34%	36%	36%	54%	26%	47%	20%	70%	65%	69%
Change	Dissat.	-14%	-4%	-7%	-3%	-14%	+8%	-2%	+6%	-9%	-45%	-4%	+7%

**Caution small sample size.*



Among those dissatisfied on each route, which direction was unsatisfactory	SEA/BAIN	SEA/BRE	PTD/TAH	EDM/KIN	FAU/VAS	FAU/SOU	SOU/VAS	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents	291	57*	38*	114	161	28*	10*	20*	194	653	62*
Eastbound	12%	11%	0%	5%	6%	9%	0%	23%	10%	13%	11%
Westbound	5%	10%	3%	6%	5%	28%	2%	13%	9%	9%	10%
Both Directions	82%	68%	52%	77%	88%	63%	79%	48%	79%	77%	72%
Always on time	1%	12%	45%	12%	1%	0%	19%	16%	1%	1%	7%

**Caution small sample size.*

On Time Arrivals

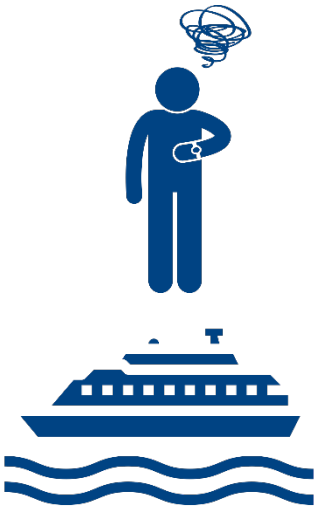


Winter 2023 also saw some improvement with a drop in on-time arrival dissatisfaction on most routes, most dramatically a forty-five point drop for the Mukilteo/Clinton route. On-time arrival dissatisfaction levels on most routes are still relatively high, with the San Juan Inter-Island (76%), Anacortes/San Juan Islands (62%), Fauntleroy/Vashon (61%), and Southworth/Vashon (59%) routes showing the highest on-time arrival dissatisfaction.

Dissatisfied riders were most often dissatisfied with both eastbound and westbound 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		3953	700	206	103	534	256	96*	21*	160	742	1048	87*
WSF has on-time/dependable arrivals	Sat. (4-5)	44%	34%	54%	39%	59%	21%	57%	32%	75%	54%	18%	8%
	Dissat. (1-2)	34%	40%	23%	31%	20%	61%	21%	59%	9%	23%	62%	76%
2022	Dissat.	46%	41%	29%	33%	30%	54%	29%	47%	18%	68%	61%	66%
Change	Dissat.	-12%	-1%	-6%	-2%	-10%	+7%	-8%	+12%	-9%	-45%	+1%	+10%

**Caution small sample size.*



Among those dissatisfied on each route, which direction was unsatisfactory	SEA/BAIN	SEA/BRE	PTD/TAH	EDM/KIN	FAU/VAS	FAU/SOU	SOU/VAS	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents	289	51*	36*	104	158	25*	10*	17*	176	653	61*
Eastbound	8%	10%	8%	6%	5%	18%	12%	10%	9%	12%	5%
Westbound	8%	9%	3%	3%	6%	12%	0%	6%	8%	12%	19%
Both Directions	83%	76%	51%	84%	89%	70%	71%	55%	82%	75%	72%
Always on time	1%	5%	38%	7%	0%	0%	17%	29%	1%	1%	4%

**Caution small sample size.*

Other Opportunity Areas



AREAS OF OPPORTUNITY

Besides schedule dependability, adequate parking, bike loading/unloading, coordination with transit schedules, clear vehicle loading directions, terminal to vessel walkway, and terminal comfort are key opportunity areas for improvement in rider satisfaction.

Rider Type:

Beyond dependability, other specific needed improvements, based upon riders' survey feedback is as follows:

- **Vehicle (Driver/Passenger)** – adequate parking near terminals, coordination with transit schedules.
- **Foot Passenger** – adequate parking near terminals, coordination with transit schedules, efficient bike loading.

By Route:

Specific areas of needed improvement by route, based upon riders' survey feedback is as follows:

- **Seattle/Bainbridge** – adequate parking, efficient bike loading/unloading, vessel walkway, coordination with transit, comfort of the terminals.
- **Seattle/Bremerton** – adequate parking, coordination with transit.
- **Point Defiance/Tahlequah** – adequate parking, clear directions and friendliness from vehicle loading crew.
- **Edmonds/Kingston** – adequate parking, vessel walkway, efficient bike loading, comfort of terminals.
- **Fauntleroy/Vashon** – efficient bike loading with clear directions, adequate parking, coordination with transit.
- **Fauntleroy/Southworth** – adequate parking, coordination with transit.
- **Southworth/Vashon** – coordination with transit, clear directions and efficiency from vehicle loading crew, adequate parking.
- **Port Townsend/Coupeville** –adequate parking.
- **Mukilteo/Clinton** – adequate parking.
- **Anacortes/SJ Island** – coordination with transit, comfort of terminals, bike unloading is efficient, friendly and clear.
- **San Juan Interisland** – coordination with transit, vehicle loading with clear directions, comfort of terminals.

All Riders – Dissatisfaction by Attribute Change from Past Year



Dissatisfaction declined on nearly three out of five attributes (improvements were seen on twenty out of the thirty-four measured attributes).

Most notable decreases in dissatisfaction:

- *WSF has on-time dependable departures (-14%)*
- *WSF has on-time dependable arrivals (-12%)*

While winter 2023 results still show about a third are dissatisfied in these two key areas, satisfaction is moving in the right direction.

Six of the eight attributes with increases in dissatisfaction only rose by a point or two, and in these cases, from 3% to 10% expressed dissatisfaction.

Most notable increases in dissatisfaction:

- *Bike loading procedures are efficient (+10%)*
- *Terminal to vessel walkway is safe (+5%)*

Dissatisfaction was unchanged on six attributes, and in these cases, from 4% to 9% expressed dissatisfaction.

Note: “Bike...” attributes added in Winter 2022.

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Code	Attributes	Dissatisfaction (1-2)			
		2023	2022	Change	2021
27	WSF has on-time dependable departures	35%	49%	-14%	17%
28	WSF has on-time dependable arrivals	34%	46%	-12%	16%
2	Terminals are comfortable	11%	18%	-7%	12%
6	Adequate parking near terminals	26%	32%	-6%	24%
5	WSF and transit schedules coordinated	17%	23%	-6%	12%
4	Terminal bathrooms are clean	7%	10%	-3%	6%
1	Terminals are clean	4%	7%	-3%	3%
13	Vehicle loading crew is friendly	8%	10%	-2%	6%
3	Terminal staff is helpful	6%	8%	-2%	5%
34	Bike unloading crew provide clear directions	3%	5%	-2%	
16	Vehicle loading crew provides clear directions	12%	13%	-1%	10%
31	Bike loading crew provide clear directions	11%	12%	-1%	
12	Efficiently processes vehicles	7%	8%	-1%	8%
23	Vessel crew is friendly	7%	8%	-1%	8%
18	Vehicle unloading procedures efficient	7%	8%	-1%	6%
8	Walk-on passenger loading efficient	6%	7%	-1%	7%
21	Ferries bathrooms are clean	6%	7%	-1%	5%
26	Dock-side holding areas fully utilized	5%	6%	-1%	6%
11	Buying tickets easy and quick	4%	5%	-1%	4%
10	Toll booth staff is friendly	3%	4%	-1%	4%
14	Vehicle loading procedures efficient	9%	9%	--	7%
24	Vessel crew is helpful	6%	6%	--	6%
22	Vessels are well maintained	6%	6%	--	4%
9	Walk-on passenger unloading efficient	5%	5%	--	5%
19	Vehicle unloading crews provide clear direction	4%	4%	--	4%
17	Vehicle unloading crew is friendly	4%	4%	--	3%
15	Loads ferries to capacity	8%	7%	+1%	7%
8	Walk-on passenger loading efficient	7%	6%	+1%	8%
20	Passenger seating areas are clean	4%	3%	+1%	3%
32	Bike unloading crew is friendly	3%	2%	+1%	
33	Bike unloading procedures are efficient	10%	8%	+2%	
29	Bike loading crew is friendly	8%	6%	+2%	
25	Terminal to vessel walkway is safe	12%	7%	+5%	9%
30	Bike loading procedures are efficient	20%	10%	+10%	



WSF Communication, Customer Service & Website

Touchpoints



CUSTOMER SERVICE TOUCHPOINTS

Website and phone customer service usage is on par with last winter. Satisfaction levels continue to provide opportunities for improvement.

Communication:

Satisfaction with WSF communication improved this winter, with one in five (19%) dissatisfied, (a significant decrease from 28% in 2022 but well above 10% in 2021). Riders express frustration with schedule dependability issues and suggest better utilization of communication tools, such as text alerts designed to alert *only* for desired routes.

WSF Website:

78% utilized the WSF website (in line with 82% in 2022 and 75% in 2021). Seven in ten website users (71%) were satisfied with their experience, up significantly from last winter (65%), but still below results from 2021 (81%).

One in ten (10%) report dissatisfaction with this touchpoint (vs. 15% in 2022), with “misleading information” and “poorly organized/difficult” the leading complaints.

Example rider comments: *“When a ferry is delayed significantly, the real-time map does not show when it has departed or when it will arrive correctly...”* *“Wildly different experience, depending on if you're accessing it via the app, mobile website, or full website.”*

WSF Phone Customer Service:

One in twenty (5%) riders have contacted WSF customer service by phone (comparable to 6% in 2022). Most (70%) callers are satisfied with their experience; however, around one in five (21%) are dissatisfied. (These ratings are similar to winter 2022 and 2021.)

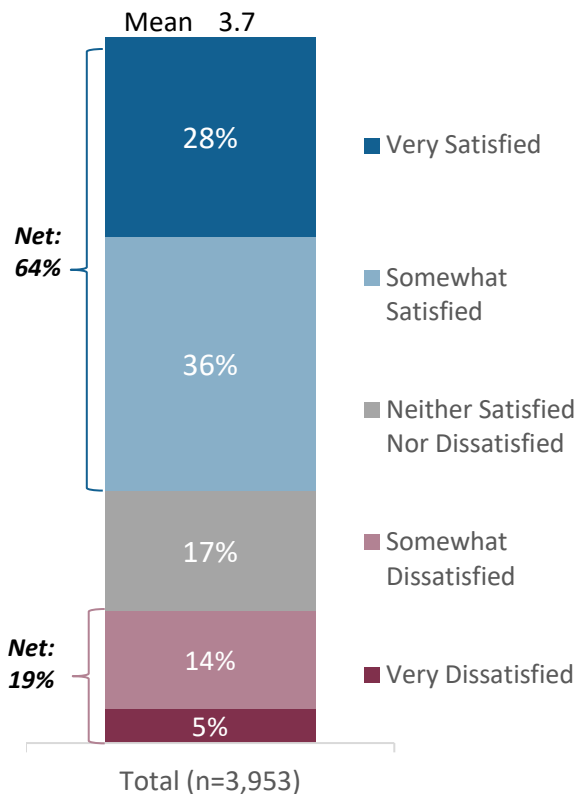
In winter 2023, the inability to help (45%) stood apart as the number one reason for dissatisfaction with customer service (as it did in winter 2022). Secondary reasons include customer service issues (25%) and no answer at all (24%).

WSF Communication



Two thirds (64%) are satisfied with WSF communication efforts, but one fifth (19%) are dissatisfied. This is an improvement compared to winter 2022 where a net 59% were satisfied and 28% were dissatisfied. Reasons for dissatisfaction in this area are tied back to schedule dependability issues as well as a desire for better utilization of communication tools, such as text alerts designed to alert only for desired routes.

Satisfaction with WSF Communication



Reasons for Dissatisfaction

"Your website needs to be monitored and updated more often with car capacity data. I (and family) have gotten erroneous information regarding this..." **Neither Satisfied nor Dissatisfied**

"WSF could provide a text/email subscription service for specific routes that sends a message as soon as it is known there will be a sailing cancelation or schedule change." **Somewhat Dissatisfied**

"You should be able to select which route you want information on. I do not care to get info on all the ferries." **Somewhat Dissatisfied**

"WSF has the Ferry Alert for text messages. Problem is it doesn't discriminate between ferry routes. The most received texts on my phone are from WSF." **Somewhat Dissatisfied**

"WSF does not always keep up with changes as they occur; and sometimes their information is too late for me to adjust to the changes. Sometimes it causes me to have to cancel appointments." **Somewhat Dissatisfied**

"You guys need to go back to letting me see the next day's schedule on the app. It's 2023, you can update the app on the fly, but I shouldn't need to go look at the crappy website to see the schedule if I want to look at the next day." **Somewhat Dissatisfied**

"WSF should know a ferry will be late when it leaves the previous stop late. Why they wait until after it is late to arrive at the next stop to inform riders is unacceptable, so far as customer service and common courtesy." **Very Dissatisfied**

"You need to post next day service on website. Install cameras at terminals because the '# of vehicles in queue' is not reliable. Do a better job of communicating!" **Very Dissatisfied**

"ZERO communication about vessel outages or one-boat service through either the app or the WSDOT webpage. Expected return to service information has NEVER been communicated. The current update on the WSDOT map is nearly two weeks old." **Very Dissatisfied**

NOTE: Verbatim responses can be found in the Excel spreadsheet file for this question.

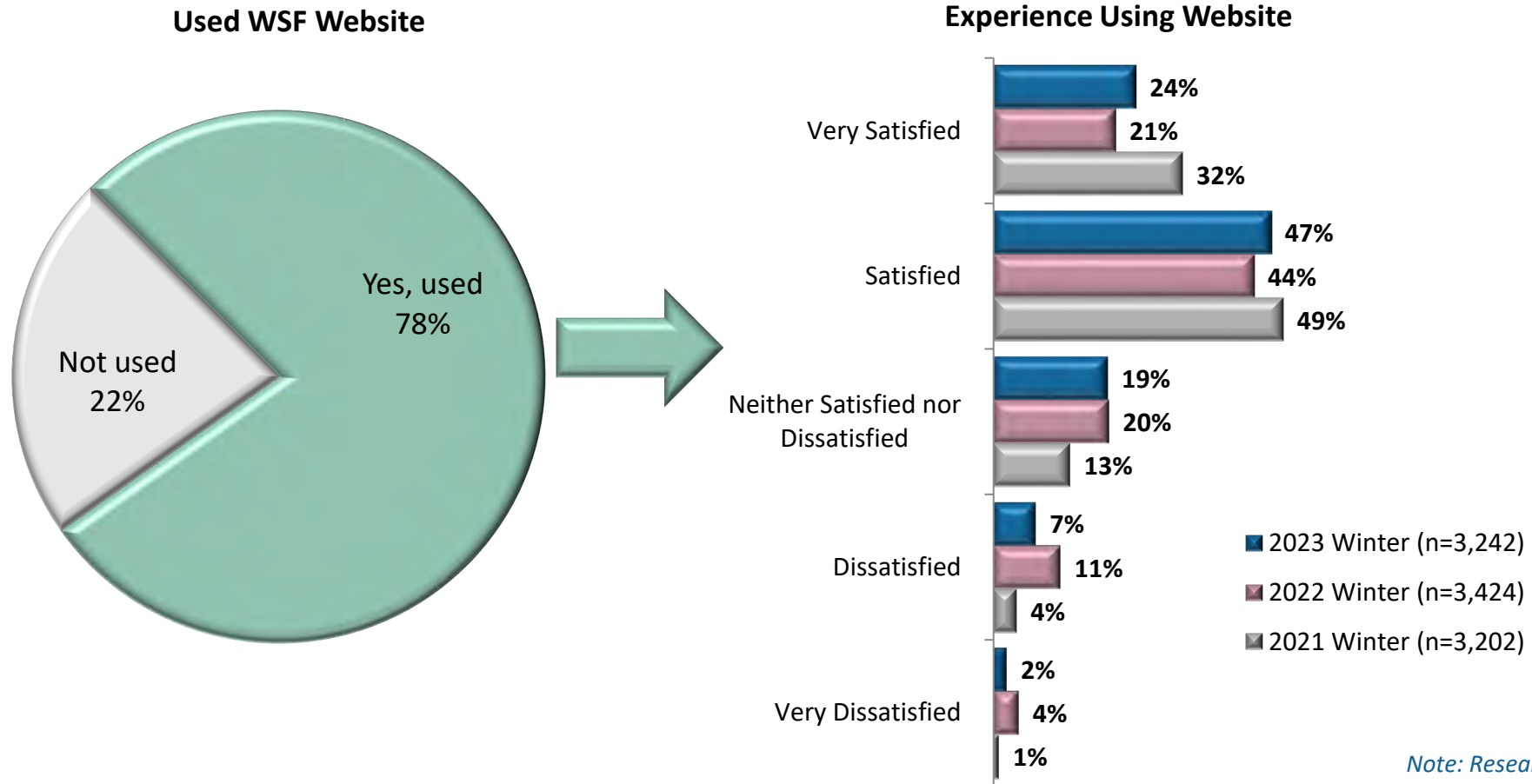
Q132. How satisfied are you with the efforts of Washington State Ferries to communicate information you need to know (including schedule changes, general ferry topics, COVID-19 service responses, etc.)?

Q133. Why do you say you are [RECALL ANSWER BASED ON Q132] with WSF's efforts regarding communicating the things you need to know such as schedule changes, general ferry topics, service responses, etc.?

Using WSF Website



Nearly four in five riders (78%) used the WSF website between January and March 2023, down from 82% in winter 2022. Seven in ten website users (71%) say they were satisfied with their experience, up significantly from last winter (65%), but still below results from 2021 (81%). One out of ten (10%) report dissatisfaction.



Q90. During the January through March 2023, have you for any reason used the WSF website?
 Q91. (ASKED OF WEB USERS ONLY) How satisfied were you with your experience using the WSF website?

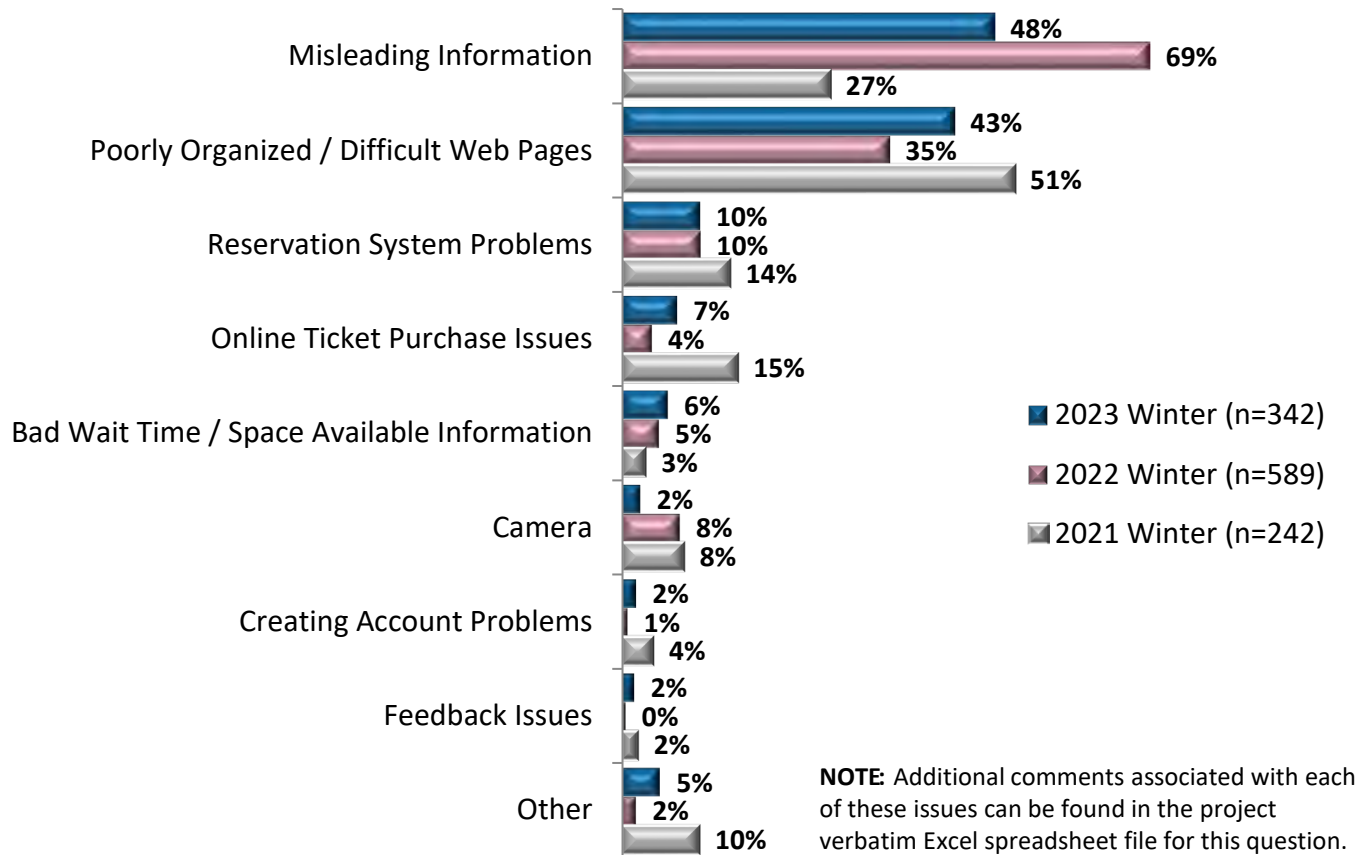
Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Reasons for Dissatisfaction with Website



Around half (48%) cite the reason for their dissatisfaction with the website as misleading information (dropping significantly from 69% in winter 2022, but still well above 27% in winter 2021). Poor organization or design is the second leading reason for dissatisfaction at 43%.

Reasons for Being Dissatisfied with WSF Website



Reasons for Dissatisfaction

Misleading Information

“When a ferry is delayed significantly, the real-time map does not show when it has departed or when it will arrive correctly. At midday it can say the next departure is at 8:00! It would also be so helpful if the map could show the changes that are put in place (extra stops) when ferries have been cancelled (which happens a lot in the San Juans).”

“Vessel Watch often inaccurate, Terminal Status data (spaces remaining, etc.) do not show sailings that are late (after scheduled departure time but prior to actual departure), system unable to accurately portray off-schedule operations.”

Poorly Organized

“To get an accurate idea of how far behind a vessel is you have to go to multiple pages of the website, including vessel watch, schedule and alerts. And even then it's difficult to know where a ferry is supposed to be at any given time. Vessel watch info columns are not helpful. Need to be revised to list scheduled departure time and actual departure.”

“Wildly different experience, depending on if you're accessing it via the app, mobile website, or full website. The app doesn't show sailing times for different days, due to the inevitability of cancelled sailings. Alerts list ferry name only, which is great if you know which vessel is assigned to your route.”

Reservation/Purchase Issues

“We kept getting kicked off. We try to make reservations early in the morning, probably when everyone else is making them. We get the reservation, go to pay, and it's gone! Over and over again.”

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

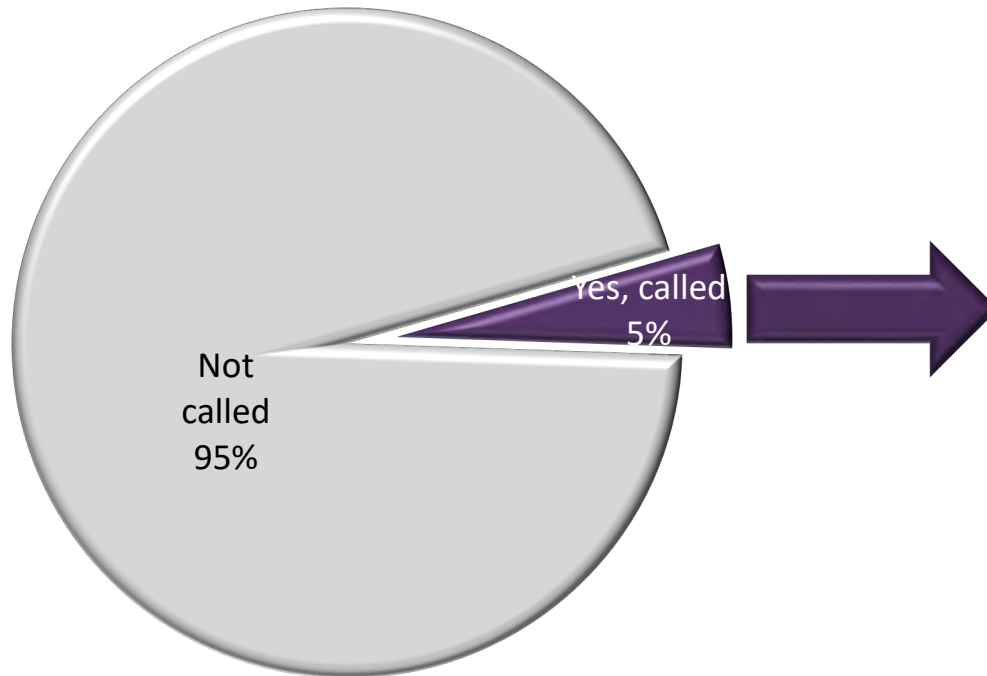
Q92. (ASKED OF DISSATISFIED WEB USERS ONLY) What specifically about your experience with the WSF website made you dissatisfied?

Calling WSF Customer Service by Phone

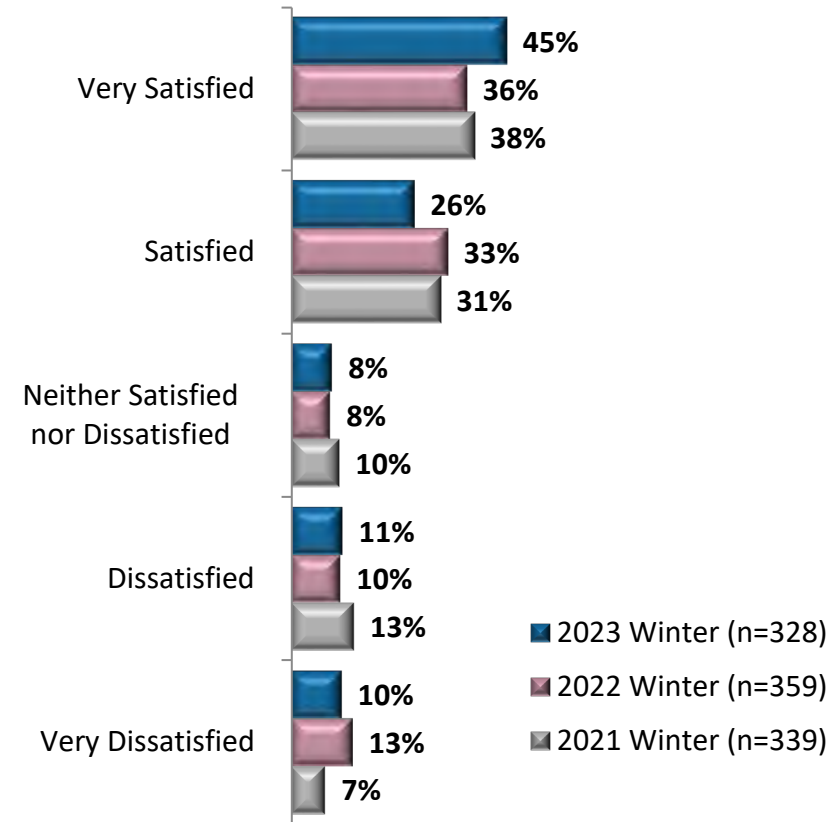


One in twenty (5%) riders have contacted WSF customer service by phone. Most (70%) callers are satisfied with their experience; however, around one in five (21%) are dissatisfied. (These ratings are similar to winter 2022 and winter 2021.)

Called WSF Customer Service



Experience Calling WSF



Q93. During January through March 2023, have you for any reason called WSF Customer Service by phone?
 Q94. (ASKED OF WSF CALLERS ONLY) How satisfied were you with your experience calling the WSF by phone?

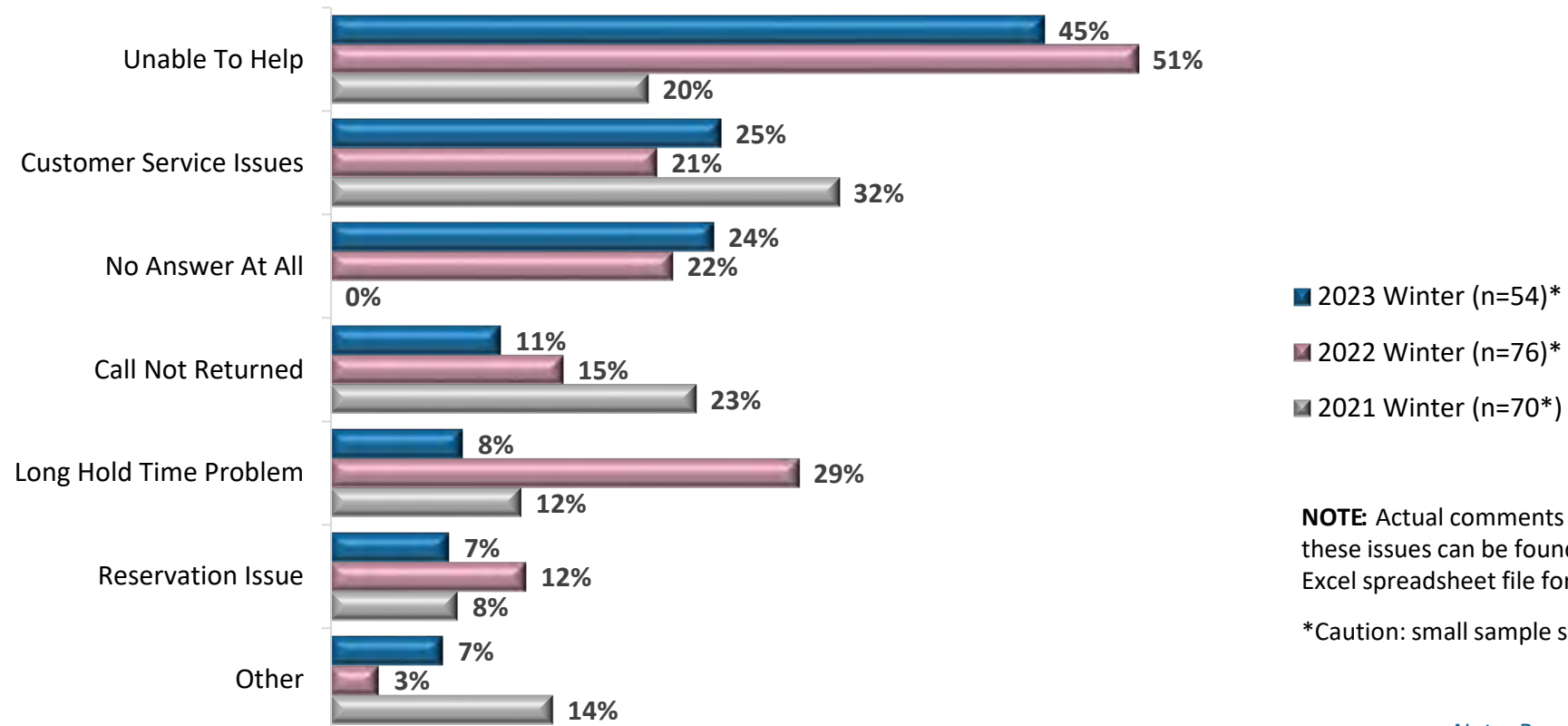
Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Reasons for Dissatisfaction w/Customer Service



In winter 2023, the inability to help (45%) stood apart as the number one reason for dissatisfaction with customer service (as it did in winter 2022). Secondary reasons include customer service issues (25%) and no answer at all (24%). Significantly fewer complain about long hold times (8%).

Reasons for Being Dissatisfied with WSF Customer Service by Phone



NOTE: Actual comments associated with each of these issues can be found in the project verbatim Excel spreadsheet file for this question.

*Caution: small sample size.

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Q95. (ASKED OF DISSATISFIED PHONE USERS ONLY) What specifically about your experience calling WSF by phone made you dissatisfied?



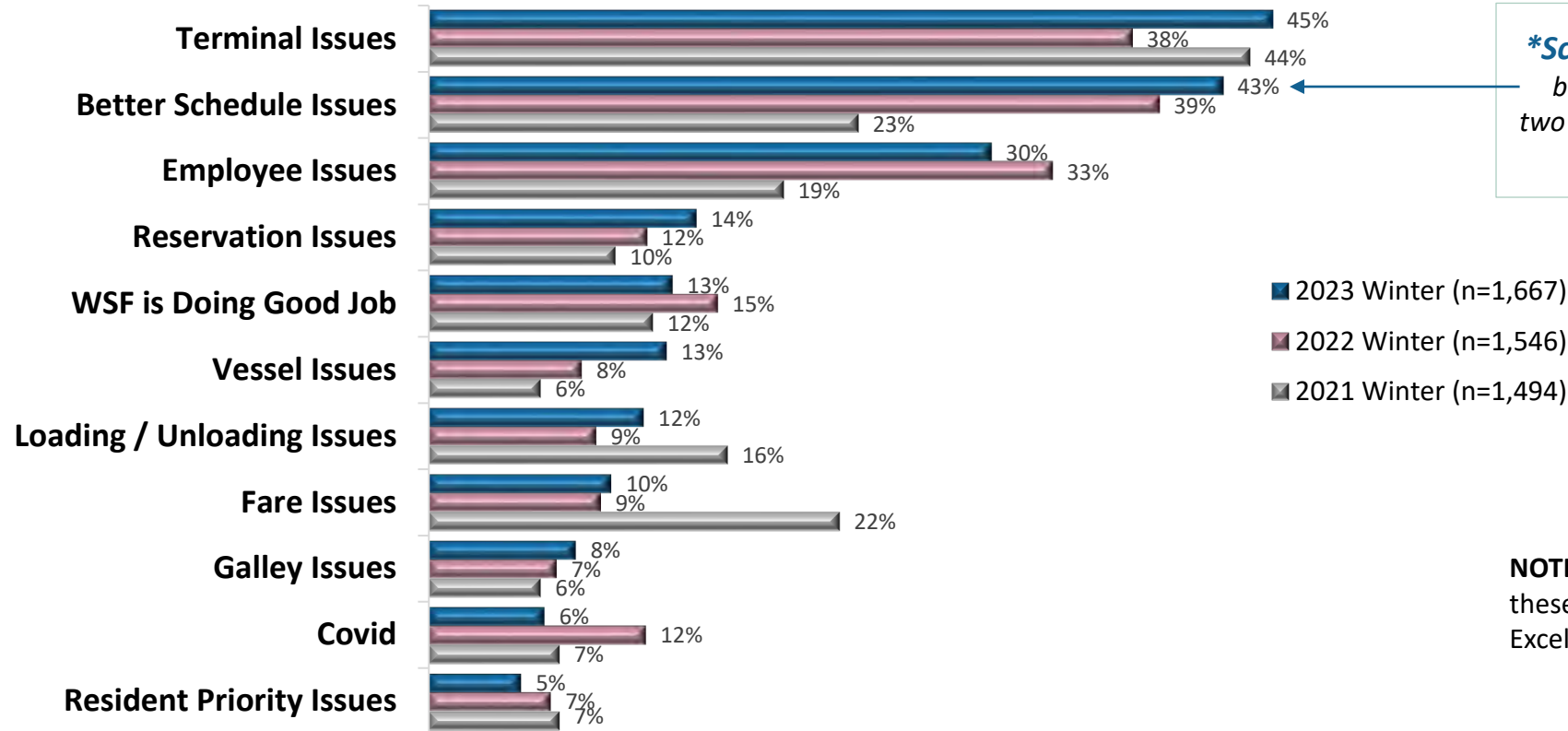
Additional Suggestions

Additional Thoughts Regarding WSF



About a third of respondents (35%) offered additional thoughts regarding the ferry system. Among those offering comments, around two out of five mentioned terminal issues (45%) or schedule issues* (43%), and close to a third mentioned employee issues (30%). Mentions regarding schedule and employee issues rose significantly compared to 2019 and 2021, while fewer mention fare issues. One out of eight (13%) said WSF is doing a good job.

**Additional Thoughts Regarding the Ferry System
(5% or greater mentions in 2023 shown)**



**Schedule issues continue to be a concern – with mentions two and a half times the level of mentions in 2019 (17%).*



NOTE: Actual comments associated with each of these issues can be found in the project verbatim Excel spreadsheet file for this question.

Note: Research was not conducted in 2020 due to the COVID-19 pandemic.

Q111/112. Do you have any additional thoughts regarding the ferry system you would like to share?



Ridership Demographics

Demographics: WSF Winter 2023 Riders vs. Regional Census



Compared to the population residing in the Washington counties serviced by the WSF system, ferry riders are more likely to be female, older, and less ethnically diverse. They are more likely to be college-educated, retired, with higher household income. Fewer have children in their household.

		Regional Census	Total Ridership 4,698
Gender	Male	50%	45%
	Female	50%	55%
Age	18-44	50%	12%
	45 - 54	16%	13%
	55 - 64	16%	25%
	65 or Over	18%	49%
Ethnicity	Caucasian	63%	92%
	BIPOC (net)	37%	8%
	Asian/Pacific Islander	14%	3%
	Hispanic	11%	1%
	Native American/Indian Nation	1%	1%
	African-American	5%	1%
	Other (*For census, includes two or more races.)	7%*	2%
Household	Average HH size	2.5	2.3
	Percent of HHs with Children	30%	13%

		Regional Census	Total Ridership 4,698
Education	Some College or less	60%	22%
	4 Year College Degree	--	37%
	Post Grad Degree	--	41%
	Net Four Year Degree or Higher	40%	78%
Employment	Employed Full-time	--	43%
	Employed Part-time	--	9%
	Net employed (F/PT)	63%	52%
	Student	--	1%
	Homemaker	--	1%
	Retired	--	44%
Income	Not Currently Employed	--	1%
	Under \$35,000	16%	5%
	\$35,000 - \$49,999	9%	6%
	\$50,000 - \$74,999	15%	11%
	\$75,000 - \$99,999	13%	17%
	\$100,000 - \$149,999	20%	25%
	\$150,000 or more	28%	36%
	Mean	--	\$119.4K

Note: Census based on 2021 data; population in the following counties in WA: Island County, King County, Kitsap County, Pierce County, Skagit County, Snohomish County, Jefferson County, and San Juan County. Gender, age and education based to population age 18+, income, number in household/children in household based to number of households, race/ethnicity based to total population, employment based to population age 16+.



THANK YOU!

For More Information Contact

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