



Washington State Transportation Commission

Ferry Riders' Opinion Group

2025 Winter WSF Performance Survey Results

June 2025



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 2025 WSF Winter Ferry Performance Study with a target audience of January through March 2025 ferry riders. This audience was sampled from the FROG panel and was further publicized via WSTC and WSF communications which included rider alerts, 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 in 2020.



- ▶ Online survey with respondents from Ferry Riders Opinion Group (FROG) panel
- ▶ Conducted March 26 to April 16, 2025, regarding respondents' personal experience riding Washington State Ferries during the 2025 winter travel period (January through March 2025).
- ▶ A total of 3,202 interviews were completed with January-March 2025 WSF riders.
- ▶ Data was weighted to reflect WSF actual ridership January 1 - March 31, 2025, by route, boarding method and ticket type used, based on the last trip taken.
- ▶ In addition, 511 FROG members who had not ridden WSF during the period of January-March 2025 were also included. These non-riders were not weighted and are included in these results where appropriate.



Overall Satisfaction & Perceived Value

Rider Satisfaction Has Significantly Increased



Results of the winter 2025 survey show a significant upswing in rider satisfaction, both overall and on most of the measured attributes. This is likely the result of positive changes WSF has made to improve their performance regarding on-time departures and arrivals and other rider touchpoints.

Some recognize that WSF is trying to do their best with limited resources, and riders may be willing to extend a little more grace and good will when they see changes being made in a positive direction. There is a sense that, while things are not perfect, *they are improving*.

“You seem to have improved on time departures and I appreciate your diligence to improving your system that we all depend upon. I know there are great challenges, and replacing ferries is a big-ticket item. I also understand there are challenges in recruiting ferry workers in all areas of the system from terminal positions to captains and mates. Good on you for trying to improve.”

“Things are improving compared to a year ago...or maybe we are just used to less boats. However, the staff is always great and much appreciated!”

“Things are getting better! I appreciate the efforts... The schedule is much more reliable.”

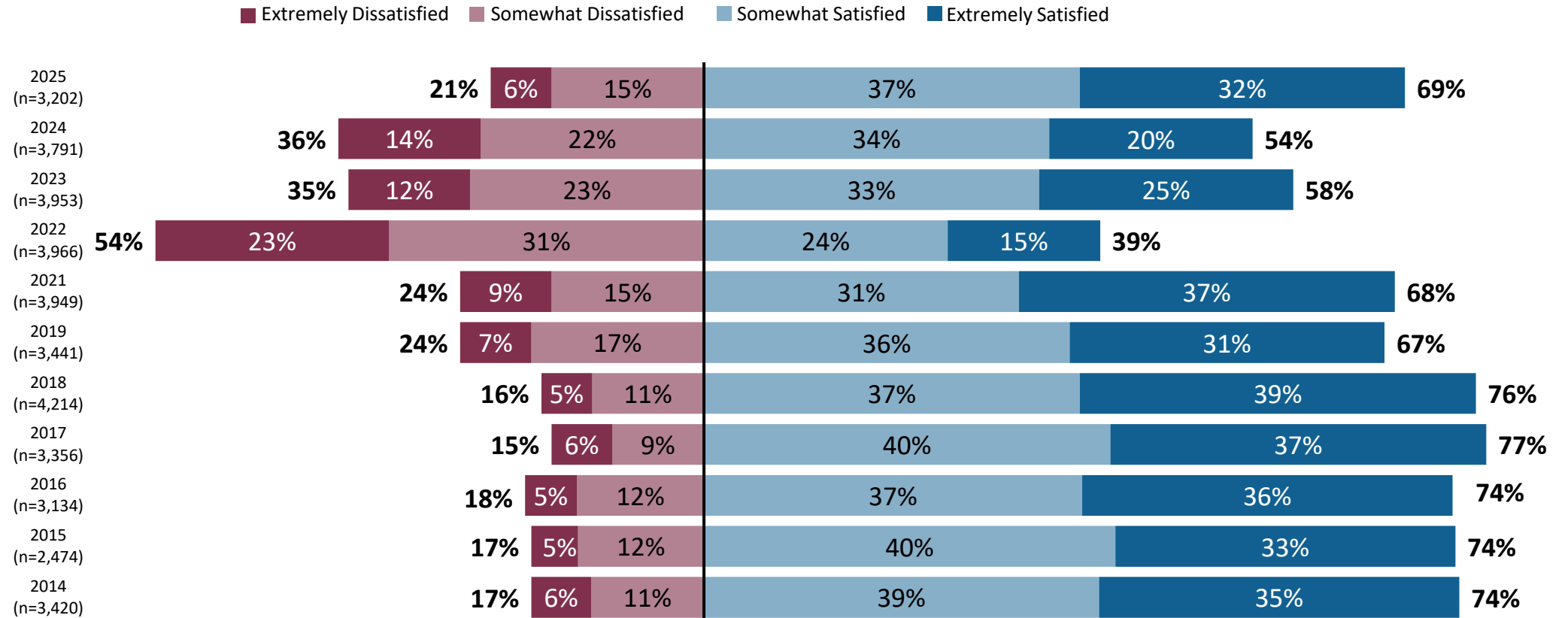
“There was a period of time when the ferries became highly unreliable with many callouts and delays; this seems to be rectified in Jan 2025-March 2025.”



Overall Satisfaction



Overall winter 2025 satisfaction at 69% is significantly higher than ratings for 2024 (54%), (and comparable to ratings from 2019 and 2021). About one in five express at least some dissatisfaction with their experience overall (a significant improvement over more than one in three dissatisfied last year).



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.

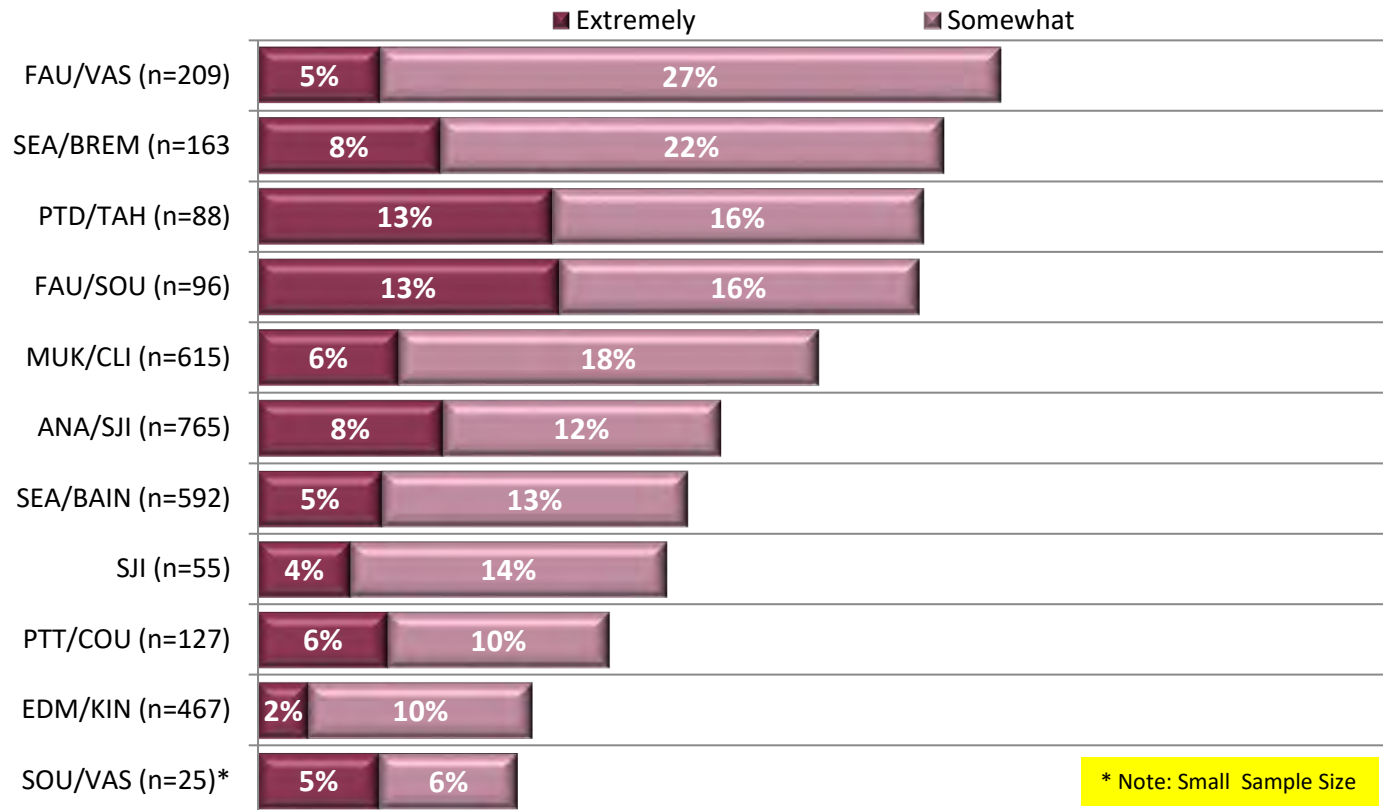
Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during January through March 2025 only. All things considered, how satisfied are you with the service provided by Washington State Ferries from January through March 2025?

Overall Dissatisfaction by Route



All routes (except Mukilteo/Clinton) saw a substantial decrease in the percentage of riders dissatisfied overall. The Fauntleroy/Vashon (32%), Seattle/Bremerton (30%), Point Defiance/Tahlequah (29%), and Fauntleroy/Southworth (29%) routes show the highest percent of riders dissatisfied overall, but those numbers are improved significantly compared to the previous year. The most dramatic improvements when it comes to reducing rider dissatisfaction are seen on the Southworth/Vashon*, San Juan Inter-Island, Fauntleroy/Vashon, and Point Defiance/Tahlequah routes.

Overall Dissatisfaction by Route - 2025 (Total Dissatisfied)



2025	2024	Shift ('25 vs '24)	2023
32%	70%	-38%	55%
30%	44%	-14%	43%
29%	58%	-29%	26%
29%	41%	-12%	33%
25%	23%	+2%	25%
20%	37%	-17%	50%
19%	34%	-15%	36%
18%	61%	-43%	67%
15%	27%	-12%	21%
12%	25%	-13%	32%
11%	62%	-51%	49%

Q1. For this survey, we are interested in your experiences and opinions of Washington State Ferries during January through March 2025 only. All things considered, how satisfied are you with the service provided by Washington State Ferries from January through March 2025?

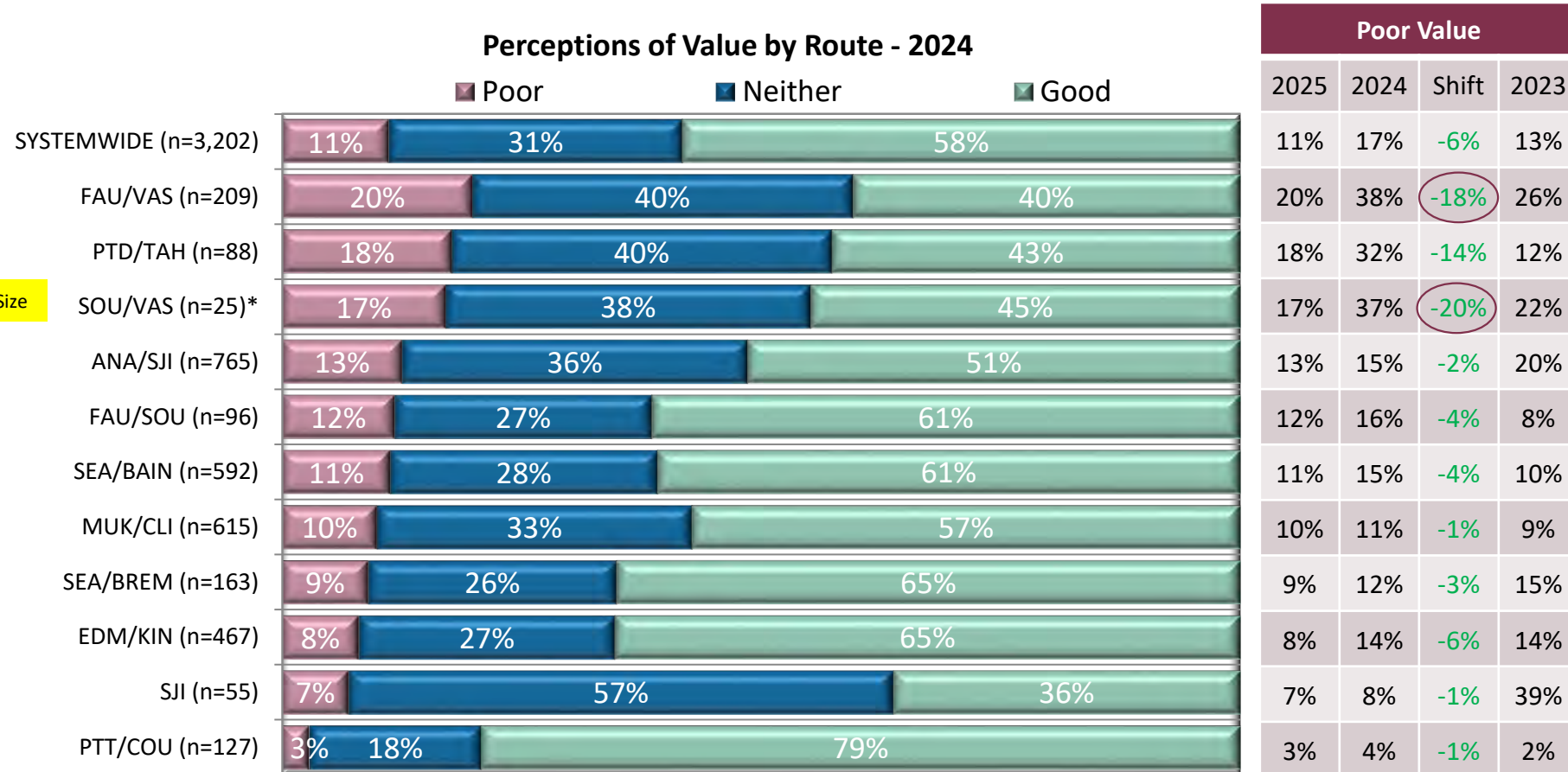
Perceived Good Value by Route



Systemwide, nearly three in five riders say that WSF is a good value, up significantly from around half saying so in 2024 (49%) and 2023 (52%). In comparison, 11% rate WSF a poor value, down from 17% in 2024 and 13% in 2023.

Improvements in terms of perceived value can be seen on all eleven routes (fewer rating it 'poor'), with Southworth/Vashon* and Fauntleroy/Vashon showing the most improvement (20- and 18-point reductions).

* Note: Small Sample Size



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?

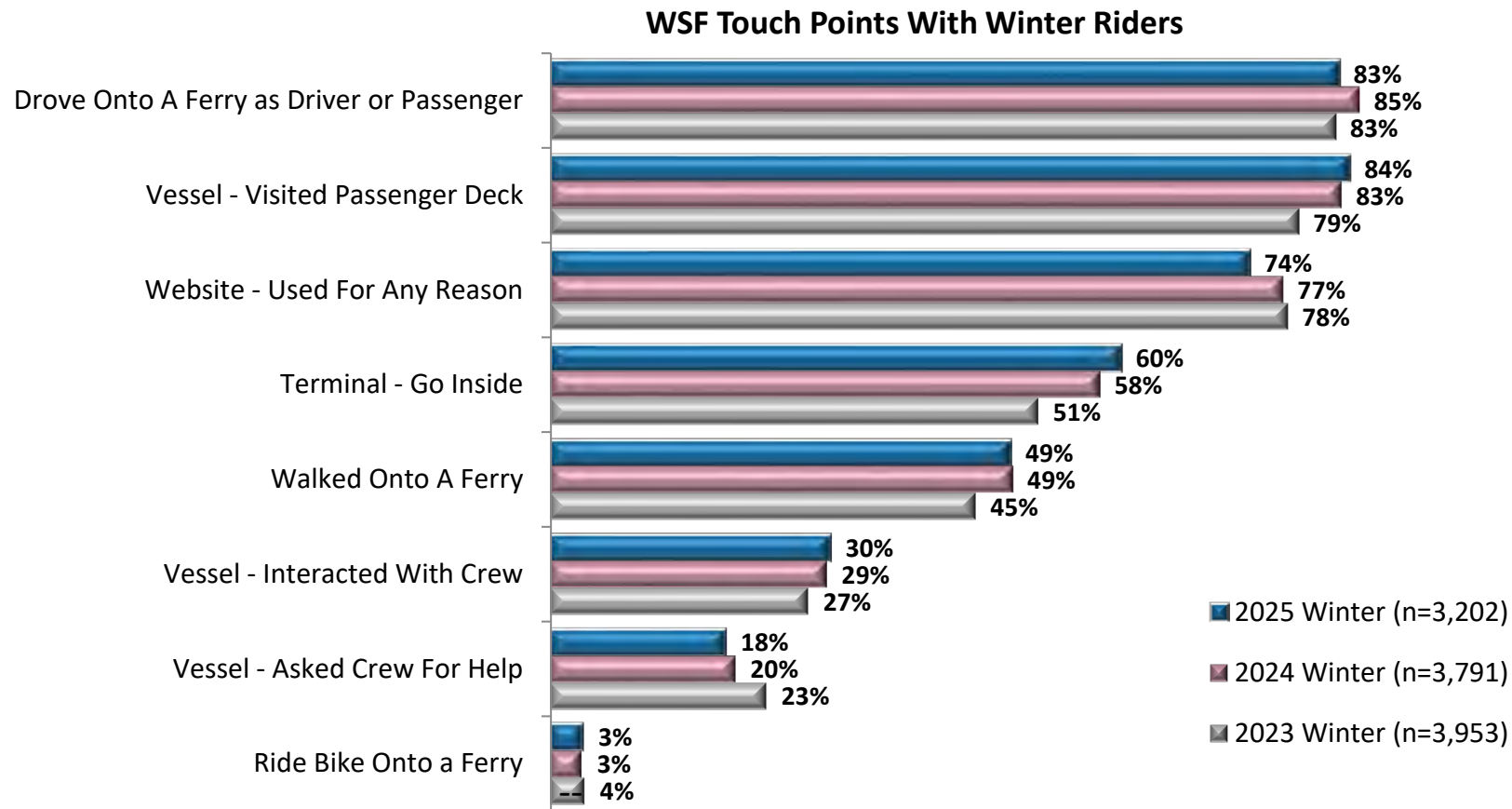


Performance Ratings

Rider Interaction With WSF



In winter 2025, the most common rider touchpoints continue to be driving onto the ferry (83%), visiting the passenger deck (84%), and using the WSF website (74%) – although website use has declined.



Q(s) During the winter period, did you ... Q20 Go inside a ferry terminal for any reason? Q103 Did you specifically ask a WSF terminal staff member for help/assistance? Q30 Did you walk onto a ferry? Q43 Did you either drive onto a ferry or board as a passenger in a vehicle? Q43B Did you ride your bike (non-motorized) onto a ferry? Q70 Did you use/visit the vessel passenger deck area? Q80 Did you have any interaction with any of the vessel crew? Q103 Did you specifically ask a WSF vessel staff member for help/assistance? Q90 Use the WSF website?

All Riders – Dissatisfaction by Attribute Change from Past Year



Dissatisfaction **declined** on twenty-nine of the thirty-four measured attributes this study period.

Most notable decreases in dissatisfaction:

- WSF has on-time dependable departures (-17%)
- WSF has on-time dependable arrivals (-15%)

Just two of the attributes saw increases in dissatisfaction:

- Bike unloading crews provide clear directions (+2%)
- Bike unloading crews are friendly/courteous (+3%)

Dissatisfaction was unchanged on three attributes:

- WSF bike unloading procedures are efficient (11%)
- Existing vehicle dock-side holding areas are being fully utilized (4%)
- Ferry passenger seating areas are clean and comfortable (4%)

Attributes	Dissatisfaction (1-2)			
	2025	2024	Change	2023
WSF has on-time/dependable departures	24%	41%	-17%	35%
WSF has on-time/dependable arrivals	23%	38%	-15%	34%
WSF bike loading crews provide clear directions and/or hand signals	3%	17%	-14%	11%
WSF sailing schedule is adequately coordinated with transit services	12%	18%	-6%	17%
There is adequate parking near the terminals	27%	32%	-5%	26%
WSF vessel crew are friendly, courteous and polite	2%	7%	-5%	7%
WSF bike loading procedures are efficient	12%	16%	-4%	20%
Terminal staff are helpful, competent and knowledgeable	4%	8%	-4%	6%
Terminals are comfortable	10%	13%	-3%	11%
WSF vehicle loading crews provide clear directions and/or hand signals	9%	12%	-3%	12%
WSF vehicle loading procedures are efficient	7%	10%	-3%	9%
Bathrooms in the terminals are clean and well maintained	5%	8%	-3%	7%
The terminal to vessel passenger walkway is comfortable and safe	5%	8%	-3%	12%
WSF vehicle loading crew are friendly, courteous and polite	5%	8%	-3%	8%
WSF vessels are well maintained (not rusty/dirty) and safe	5%	8%	-3%	6%
WSF vessel crew are helpful, competent and knowledgeable	3%	6%	-3%	6%
WSF loads ferries to capacity with little room between vehicles	6%	8%	-2%	8%
WSF bike loading crew are friendly, courteous and polite	6%	8%	-2%	8%
Bathrooms on the ferries are clean and well maintained	6%	8%	-2%	6%
WSF vehicle unloading procedures are efficient	5%	7%	-2%	7%
WSF provides easy loading and unloading for walk-on passengers	5%	7%	-2%	6%
WSF walk-on passenger loading procedures are efficient	4%	6%	-2%	7%
WSF walk-on passenger unloading procedures are efficient	3%	5%	-2%	5%
WSF makes buying tickets easy and quick	3%	5%	-2%	4%
WSF vehicle unloading crew are friendly, courteous and polite	2%	4%	-2%	4%
WSF efficiently processes vehicles through ticket lanes	6%	7%	-1%	7%
WSF vehicle unloading crews provide clear directions and/or hand signals	3%	4%	-1%	4%
Terminals are clean and well maintained	3%	4%	-1%	4%
WSF toll booth staff are friendly, courteous and polite	2%	3%	-1%	3%
WSF bike unloading procedures are efficient	11%	11%	--	10%
Existing vehicle dock-side holding areas are being fully utilized	4%	4%	--	5%
Ferry passenger seating areas are clean and comfortable	4%	4%	--	4%
WSF bike unloading crews provide clear directions and/or hand signals	6%	4%	+2%	3%
WSF bike unloading crew are friendly, courteous and polite	6%	3%	+3%	3%

Summary of Attribute Dissatisfaction by Route



Dissatisfaction	Color Code: Light (10-19%), Medium (20-29%), Heavy (>30%)			Dissat.	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
	Number of Respondents Varies by Question (Max n Size Shown)			(1-2)	592	163	88	467	209	96	25*	127	615	765	55*
There is adequate parking near the terminals	27%	20%	22%	30%	23%	49%	47%	9%	19%	43%	17%	14%			
WSF has on-time/dependable departures	24%	31%	5%	41%	8%	46%	37%	37%	7%	24%	23%	17%			
WSF has on-time/dependable arrivals	23%	30%	4%	39%	8%	44%	38%	37%	5%	23%	22%	23%			
WSF sailing schedule is adequately coordinated with transit services	12%	9%	19%	15%	9%	20%	7%	18%	7%	10%	36%	36%			
WSF bike loading procedures are efficient	12%	6%		61%		23%				38%	16%				
WSF bike unloading procedures are efficient	11%	8%			35%					13%	52%				
Terminals are comfortable	10%	8%	10%	9%	15%	13%	9%		6%	4%	18%	30%			
WSF vehicle loading crews provide clear directions and/or hand signals	9%	8%	3%	13%	6%	19%	11%	<1%	7%	9%	11%	15%			
WSF vehicle loading procedures are efficient	7%	6%	8%	8%	6%	13%	9%	4%	2%	5%	11%	17%			
WSF bike unloading crews provide clear directions and/or hand signals	6%	6%			20%					13%	16%				
WSF bike unloading crew are friendly, courteous and polite	6%	6%			20%					13%	16%				
Bathrooms on the ferries are clean and well maintained	6%	9%	9%	5%	6%	2%	4%		<1%	5%	6%	9%			
WSF bike loading crew are friendly, courteous and polite	6%	4%			20%					13%	16%				
WSF loads ferries to capacity with little room between vehicles	6%	4%	4%	9%	5%	10%	5%	<1%	5%	5%	7%	2%			
WSF efficiently processes vehicles through ticket lanes	6%	3%	5%	9%	4%	14%	7%	6%	<1%	6%	4%	4%			
WSF vehicle loading crew are friendly, courteous and polite	5%	3%	4%	6%	5%	12%	6%	6%	3%	5%	9%	6%			
WSF vessels are well maintained (not rusty/dirty) and safe	5%	6%	4%	<1%	6%	8%	5%	<1%	1%	4%	10%	9%			
Bathrooms in the terminals are clean and well maintained	5%	3%	8%	4%	4%	6%	7%		2%	9%	13%	23%			
WSF provides easy loading and unloading for walk-on passengers	5%	6%	9%		3%	7%	6%		3%	4%	4%	4%			
The terminal to vessel passenger walkway is comfortable and safe	5%	5%	8%		5%	8%	4%		3%	4%	6%	4%			
WSF vehicle unloading procedures are efficient	5%	5%	3%	9%	5%	8%	9%	4%	2%	2%	5%	10%			
Terminal staff are helpful, competent and knowledgeable	4%	4%	6%	6%	4%	4%	11%		1%	5%	4%				
Existing vehicle dock-side holding areas are being fully utilized	4%	3%	1%	8%	3%	12%	6%	4%		3%	3%	2%			
Ferry passenger seating areas are clean and comfortable	4%	7%	5%	<1%	3%	<1%	1%		2%	2%	9%	5%			
WSF walk-on passenger loading procedures are efficient	4%	4%	8%	2%	1%	8%	3%	12%	1%	3%	3%	4%			
WSF bike loading crews provide clear directions and/or hand signals	3%	5%								13%	22%				
WSF walk-on passenger unloading procedures are efficient	3%	4%	3%		1%	5%	6%		3%	4%	5%				
WSF makes buying tickets easy and quick	3%	2%	5%	2%	2%	8%	3%	6%	3%	2%	2%				
Terminals are clean and well maintained	3%	2%	2%		4%	5%	4%			2%	11%	7%			
WSF vehicle unloading crews provide clear directions and/or hand signals	3%	2%	2%	6%	2%	5%	2%		2%	3%	3%	1%			
WSF vessel crew are helpful, competent and knowledgeable	3%	3%	2%			3%	13%		3%	4%	3%				
WSF vessel crew are friendly, courteous and polite	2%	2%			2%	3%	13%		3%	3%	4%	2%			
WSF toll booth staff are friendly, courteous and polite	2%	1%	4%	5%	2%	4%	1%		2%	2%	3%				
WSF vehicle unloading crew are friendly, courteous and polite	2%	1%	1%	3%	2%	4%	2%		1%	3%	3%				

*Caution small sample size.



Areas of Opportunity

On Time Departures

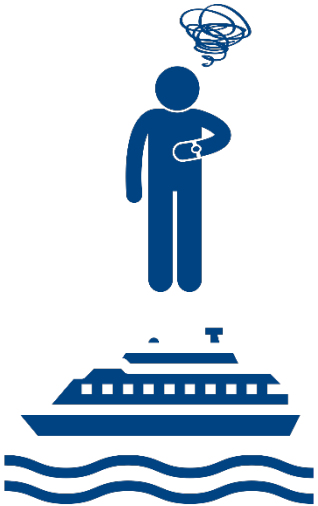


Winter 2025 saw a decrease in dissatisfaction with on-time departure across the board, with a seventeen-point drop in dissatisfaction overall. Improvements were most dramatic on the SJ Inter-island and Southworth/Vashon routes, each with a forty-point reduction in dissatisfaction, and on Fauntleroy/Vashon with a thirty-three-point reduction in dissatisfaction. In total, about one in four riders are dissatisfied with on-time departures. Dissatisfaction is highest on the Fauntleroy/Vashon, Southworth/Vashon, Fauntleroy/Southworth, and Point Defiance/Tahlequah routes with about two fifths of riders dissatisfied.

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		3202	592	163	88	467	209	96	25*	127	615	765	55*
WSF has on-time/dependable departures	Satisfied (4-5)	49%	40%	67%	20%	73%	24%	41%	33%	76%	49%	50%	46%
	Dissatisfied (1-2)	24%	31%	5%	41%	8%	46%	37%	37%	7%	24%	23%	17%
2024	Dissatisfied	41%	48%	24%	55%	25%	79%	53%	77%	12%	27%	48%	57%
Change	Dissatisfied	-17%	-17%	-19%	-14%	-17%	-33%	-16%	-40%	-5%	-3%	-25%	-40%

*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	212	38*	108	131	143	54*	56*	59*	171	205	42*
Eastbound	15%	18%	5%	8%	7%	11%	8%	7%	9%	12%	2%
Westbound	12%	2%	3%	7%	3%	13%	3%	4%	6%	16%	4%
Both Directions	72%	43%	72%	46%	88%	72%	79%	32%	84%	63%	81%
Always on time	2%	38%	20%	39%	2%	5%	11%	57%	1%	8%	13%

*Caution small sample size.

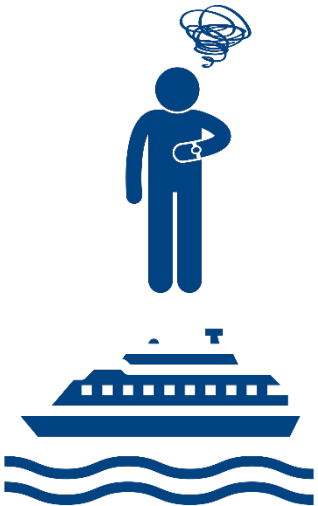
On Time Arrivals



Winter 2025 also saw a decrease in on-time arrival dissatisfaction across all routes, with a fifteen-point drop in dissatisfaction overall. Improvements were most dramatic on the SJ Inter-island and Fauntleroy/Vashon routes, each with a thirty-four-point reduction in dissatisfaction. In total, about one in four riders are dissatisfied with on-time arrivals. Dissatisfaction is highest on the Fauntleroy/Vashon, Southworth/Vashon, Fauntleroy/Southworth, and Point Defiance/Tahlequah routes with about two fifths of riders dissatisfied. 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		3202	592	163	88	467	209	96	25*	127	615	765	55*
WSF has on-time/dependable arrivals	Satisfied (4-5)	51%	42%	71%	26%	76%	25%	39%	40%	78%	50%	50%	46%
	Dissatisfied (1-2)	23%	30%	4%	39%	8%	44%	38%	37%	5%	23%	22%	23%
2024	Dissatisfied	38%	46%	23%	52%	21%	78%	47%	66%	12%	26%	49%	57%
Change	Dissatisfied	-15%	-16%	-19%	-13%	-13%	-34%	-9%	-29%	-7%	-3%	-27%	-34%

**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	204	34*	104	125	139	55*	55	54	155	199	40*
Eastbound	15%	14%	4%	6%	5%	8%	8%	3%	6%	11%	5%
Westbound	12%	9%	4%	13%	5%	12%	1%	6%	4%	17%	2%
Both Directions	70%	38%	73%	45%	88%	71%	80%	35%	89%	64%	78%
Always on time	4%	39%	19%	37%	2%	8%	11%	56%	1%	8%	15%

**Caution small sample size.*

Adequate Parking Near Terminals



Systemwide, fewer than half of riders who walked on to their ferry are satisfied with the adequacy of parking near terminals. Dissatisfaction has declined in total and across most routes compared to winter 2024. Dissatisfaction is highest on the Fauntleroy/Vashon, Fauntleroy/Southworth and Mukilteo/Clinton routes, where almost half are dissatisfied.

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		1418	431	102	37*	194	109	27*	12*	50*	236	195	25*
There is adequate parking near the terminals	Satisfied (4-5)	44%	54%	43%	24%	46%	25%	37%	67%	55%	27%	54%	64%
	Dissatisfied (1-2)	27%	20%	22%	30%	23%	49%	47%	9%	19%	43%	17%	14%
2024	Dissatisfied	32%	24%	36%	35%	22%	59%	40%	9%	24%	48%	18%	11%
Change	Dissatisfied	-5%	-4%	-14%	-5%	+1%	-10%	+7%	--	-5%	-5%	-1%	+3%

**Caution small sample size.*

Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Very expensive in Kingston unless you find a non-paying spot. They don't allow for a ticket for less than 12 hrs. Sometimes I'm only gone for 3-4.

Very little affordable multi-hour parking in Mukilteo within easy walking distance to the ferry, and no overnight parking. When the terminal was moved that was promised and would help greatly with ferry back-ups. In the summer, especially, if there is a four hour wait on the Mukilteo side, I would be able to park my car, walk on and walk home or be picked up, and come back for my car when the line was gone. And friends would be able to visit more easily.

There's no reasonable priced parking near the terminal. We can't afford to park and ride the ferry, and pay for both.

There's no parking near Fauntleroy except street parking, which is a long way from the terminal.

Seattle overnight parking is a challenge and VERY expensive. Less expensive to just drive on.



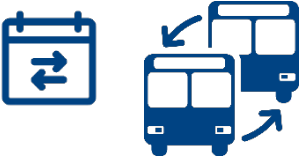
Sailing Schedule Coordinated with Transit



When it comes to coordination with transit services, dissatisfaction improved notably on most routes while increasing on the Anacortes/SJI and SJ Inter-Island* routes, where dissatisfaction is the highest (at 36% each). Overall, one in eight (12%) are dissatisfied (down from about one in six).

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	1418	431	102	37*	194	109	27*	12*	50*	236	195	25*
WSF sailing schedule is adequately coordinated with transit services available at the terminal	Satisfied (4-5)	46%	52%	49%	25%	44%	31%	40%	30%	60%	52%	24%	11%
	Dissatisfied (1-2)	12%	9%	19%	15%	9%	20%	7%	18%	7%	10%	36%	36%
	2024 Dissatisfied	18%	14%	24%	26%	14%	39%	18%	35%	13%	10%	29%	18%
	Change	-6%	-5%	-5%	-11%	-5%	-19%	-11%	-17%	-6%	--	+7%	+18%

**Caution small sample size.*



Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Transit services on Bainbridge Island do not adequately serve those traveling outside regular commuter hours.

Trains running to Seattle only happen in the morning and early afternoon. OK for commuter but useless for real people. Light rail only works if you have all day to wait because of the multiple transfers.

There has never been adequate coordination for San Juan residents to access public transportation in Anacortes, i.e., airport shuttles, skat busses, etc. This has to change if we want to increase walk on traffic.

The only bus that connects Edmonds to light rail is slow and infrequent.

It isn't WSF's fault, but there are no reasonable transit offerings on the Seattle side, so you have to walk several blocks to either 3rd Ave bus stop or light rail station. An ideal situation would be to have mainline buses outside of the ferry terminal with frequent service.

Bike Loading Efficiency



One in eight (12%) responding are dissatisfied with bike loading efficiency, and around two thirds are satisfied. (Caution should be used when looking at responses by route due to small sample sizes.)

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		92	37*	9*	3*	10*	9*	2*	0*	5*	6*	10*	1*
WSF bike loading procedures are efficient	Satisfied (4-5)	68%	66%	73%	0%	94%	77%	100%	0%	47%	62%	74%	0%
	Dissatisfied (1-2)	12%	6%	0%	61%	0%	23%	0%	0%	0%	38%	16%	0%
2024	Dissatisfied	16%	19%	12%	0%	0%	42%	0%	0%	0%	15%	20%	0%
Change	Dissatisfied	-4%	-13%	-12%	+61%	--	-19%	--	--	--	+23%	-4%	--

**Caution small sample size.*

Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Very dissatisfied, it seems that since Covid WSF ferries seems to think of bicycles and motorcycles as the same vehicle. Mixing bikes and motorcycles is not good, this may be a bigger issue due to e-bikes and the kickstands sitting along side motorcycles.

The Seattle loading staff are surly and make bikers wait longer than necessary in the fume ridden parking lot. They used to and should be having bikers load mid-stream (i.e., half way through loading the cars), but they don't. Bainbridge loaders do however.

Motorcycles being allowed to cut in once cars start loading. If safety is a concern for why bicycles are not allowed to load with cars motorcycles are no different. Bicycles are actually quicker than either motorcycles or cars.

Fauntleroy is unsafe for cyclists.

Bicycle loading is low priority, often delayed for no reason, bicycles at back often required to wait until all vehicles are unloaded.



Bike Unloading Efficiency



One in nine (11%) responding are dissatisfied with the efficiency of unloading bikes, in line with results from winter 2024. Dissatisfaction is highest among cyclists on the Edmonds/Kingston and Anacortes/SJ Islands routes. (Caution should be used when looking at responses by route due to small sample sizes.)

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		92	37*	9*	3*	10*	9*	2*	0*	5*	6*	10*	1*
WSF bike unloading procedures are efficient	Satisfied (4-5)	70%	80%	73%	0%	59%	92%	50%	0%	47%	87%	44%	0%
	Dissatisfied (1-2)	11%	8%	0%	0%	35%	0%	0%	0%	0%	13%	52%	0%
2024	Dissatisfied	11%	12%	0%	0%	0%	30%	0%	0%	0%	8%	30%	0%
Change	Dissatisfied	--	-4%	--	--	+35%	-30%	--	--	--	+5%	+22%	--

**Caution small sample size.*

Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Too frequently bicyclists are loaded at front of boat, thus prompting more harrowing and stressful off-loading with vehicles hard following. Bikes should always be last-on/last-off as they can fit in around vehicles aft and are then not subject to enraged drivers exiting the boat and roaring through town.

This is the worst issue I have and it's especially bad on the afternoon sailings. Crew allows motorcycles to park side by side in a manor that blocks the bikes in. One day there was literally no room for a bike to offload through the motorcycles. I have ridden my bike on the ferry for over 25 years and in the past, with many more bikes, this was not a problem. The crew need to do a better job of separating bikes and motorcycles as they come onto the ferry so there is enough room to get the bikes off first.

Inconsistent unloading; not enough room to clear motorcycles. Revving engines prematurely causes anxiety.

If it's unclear which end of the ferry to bring bike to, it can be very inconvenient and inefficient to bring bike past all the cars from one end to the other to offload.

I get stuck in motorcycles, it's very stressful and often I have to be assertive to get up to the front to where I need to be, then often unclear where I'm supposed to be. Again, I feel like I'm a bother as opposed to a valued passenger.



Vehicle Loading Crews Provide Clear Directions



System-wide, close to three quarters are satisfied with the crew providing clear loading directions, and one in eleven (9%) passengers are dissatisfied. Dissatisfaction is highest on the Fauntleroy/Vashon, Point Defiance/Tahlequah, Fauntleroy/Southworth, Anacortes/SJ Islands, and SJ Inter-island* routes.

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		2648	453	107	72	389	183	78	22*	103	534	658	49*
WSF vehicle loading crews provide clear directions/hand signals	Satisfied (4-5)	72%	77%	75%	58%	78%	55%	74%	52%	79%	72%	65%	50%
	Dissatisfied (1-2)	9%	8%	3%	13%	6%	19%	11%	0%	7%	9%	11%	15%
2024	Dissatisfied	12%	10%	7%	23%	10%	25%	22%	18%	3%	10%	14%	16%
Change	Dissatisfied	-3%	-2%	-4%	-10%	-4%	-6%	-11%	-18%	+4%	-1%	-3%	-1%

*Caution small sample size.

Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Vague pointing is common, or signaling/yelling after you have gone the direction they pointed. Often signal when you are already even with or past them. They often assume customers are experienced in loading and when the driver doesn't know the drill, there is confusion. Southworth in particular with the drive around or load backing on to the ferry.

Virtually no hand signals, no eye contact, sullen expressions. I know where to go but those who do not are treated rudely. Many times the first mate has back to onloading cars. There is little to no direction if you are following a larger vehicle and then obvious anger is emoted when following the oversized vehicle ahead.

Trying to drive onto the ferry heading for Coupeville, the deckhand was directing traffic to go into one lane but suddenly changed that as my tiny Fit approached. It was absolutely NOT clear where he wanted me to go, just that whatever I was doing was wrong. It was embarrassing AND frustrating and my passengers agreed the hand signals were totally unclear about where I was supposed to go.

The number of times when backing up onto the boat (in van or truck - mostly in the dark, and sometimes in the rain - which has its own challenges). The quality, clarity and consistency of the hand signals has been pretty shocking. The driver is usually made to feel at blame for not understanding.



The Terminals are Comfortable



Satisfaction with terminal comfort improved slightly on most routes. Dissatisfaction is highest on the SJ Inter-Island route (30% - rising sixteen-points compared to winter 2024). System-wide, one in ten (10%) are dissatisfied in winter 2025.

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		1874	473	121	49*	232	133	49*	18*	94	307	371	27*
The terminals are comfortable (seating, temperature, etc.)	Satisfied (4-5)	68%	71%	73%	50%	62%	56%	65%	73%	77%	81%	54%	21%
	Dissatisfied (1-2)	10%	8%	10%	9%	15%	13%	9%	0%	6%	4%	18%	30%
2024	Dissatisfied	13%	13%	11%	15%	16%	14%	12%	0%	6%	6%	23%	14%
Change	Dissatisfied	-3%	-5%	-1%	-6%	-1%	-1%	-3%	--	--	-2%	-5%	+16%

**Caution small sample size.*

Example of Verbatim Complaints among those Dissatisfied – (complete sorted verbatims in separate document)

Too cold to sit there for a couple hours waiting for the ferry.

They are soulless with concrete flooring, uncomfortable seating and bad lighting.

The Kingston passenger area is cold and drafty and there is not enough seating. The heaters are ineffective and sitting on a metal bench in the wind is very unpleasant.

The Seattle terminal is very loud and it feels inhospitable--I miss the coziness of the old terminal, where I could wait in comfort in one of the places to eat.

The seating is insufficient, uncomfortable and the TOTAL LACK of catering remains a deep irritant.



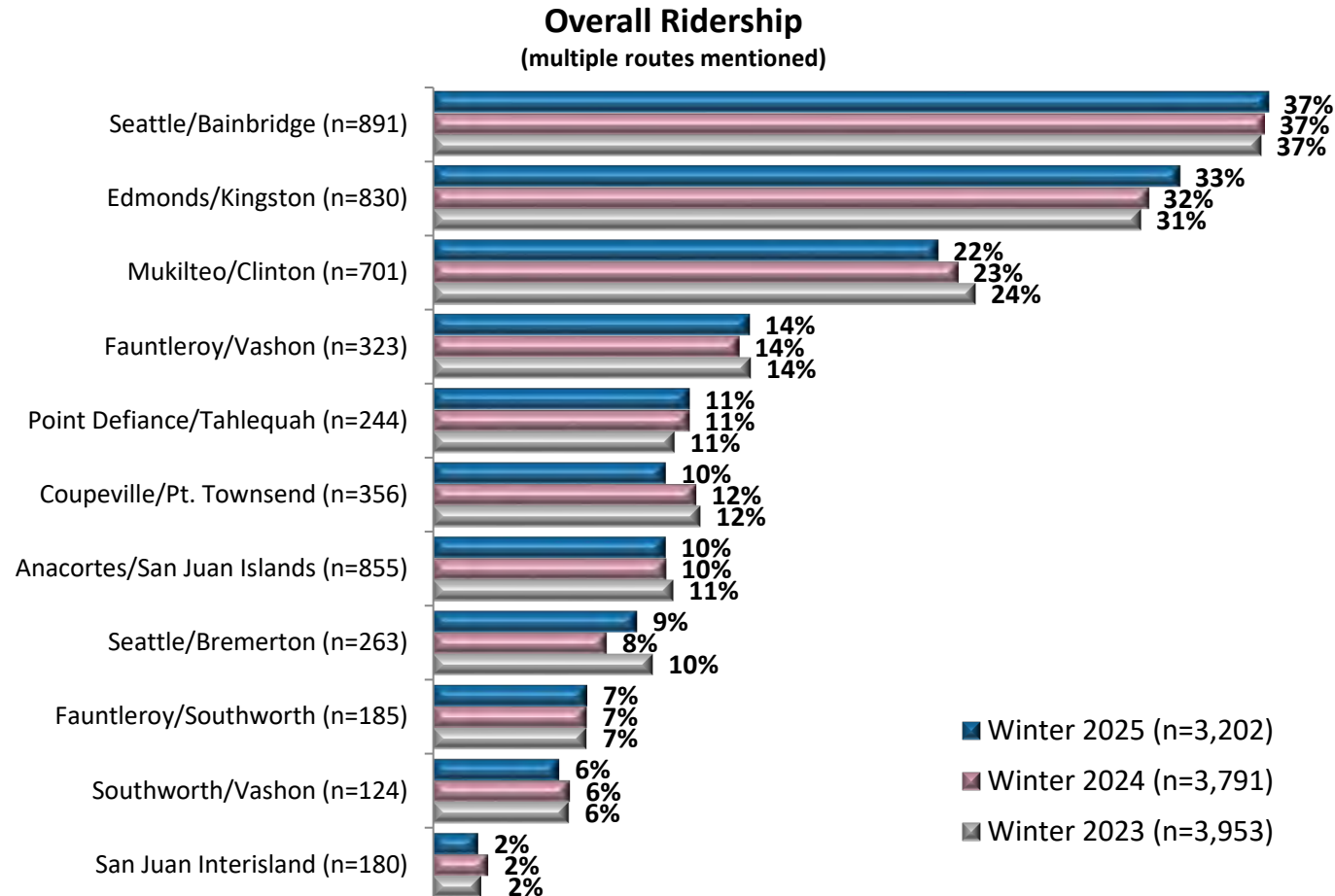


Ridership Patterns

Ridership



The Seattle/Bainbridge route maintained its top position holding at 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. The Seattle/Bremerton route at 9% remains significantly lower than its 2019 level of 18%. Other routes are generally on par with their 2019 levels.

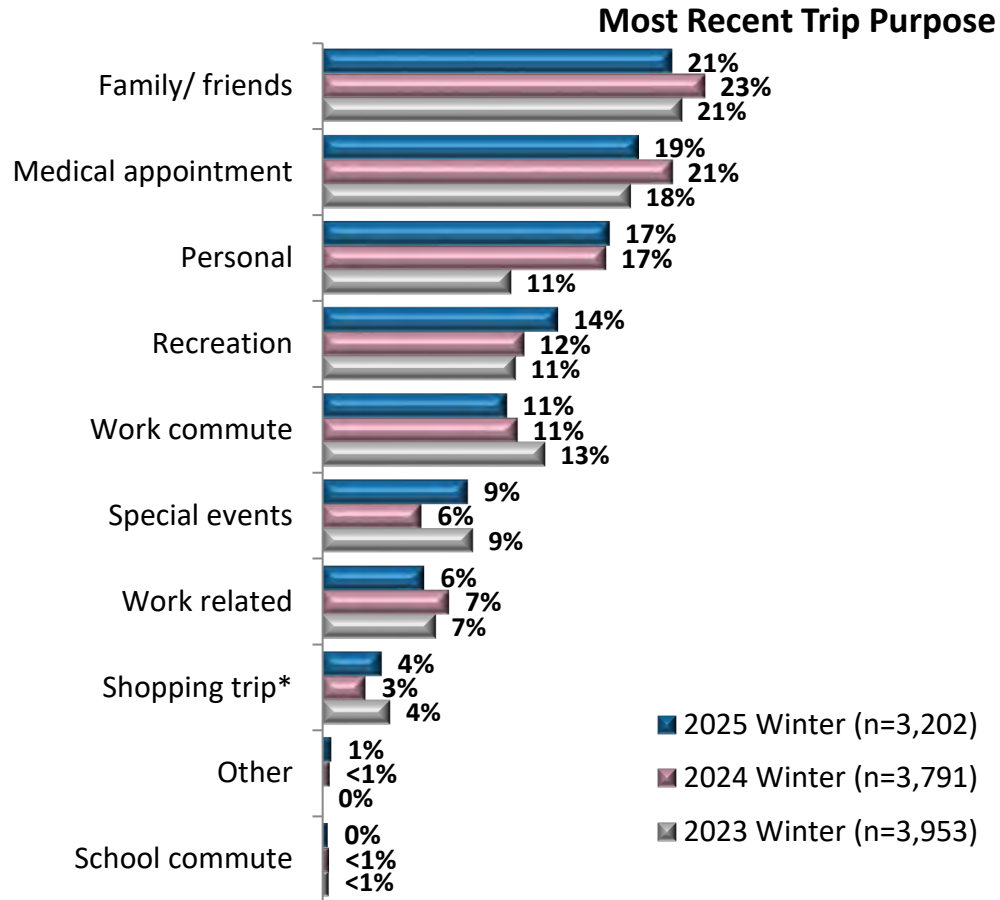


Q2. Which of the following route(s) have you ridden for any purpose January through March 2025? [CHECK ALL THAT APPLY]

Most Recent Trip – Purpose



Visiting family/friends (21%) and medical appointments (19%) continue as the most common purposes for the most recent trip taken, followed by trips for personal business (17%). Trips for personal reasons and recreation are significantly higher vs. winter 2023. The proportion of trips for work commuting continue well below the levels seen in 2019.



Purpose	Purpose		
	2025	2019	Shift
Family/ friends	21%	17%	+4%
Medical appointment	19%	15%	+4%
Personal	17%	16%	+1%
Recreation	14%	10%	+4%
Work commute	11%	19%	-8%
Special events	9%	8%	+1%
Work related	6%	7%	-1%
Shopping trip*	4%	6%	-2%
School commute	<1%	0%	--
Other	1%	2%	-1%

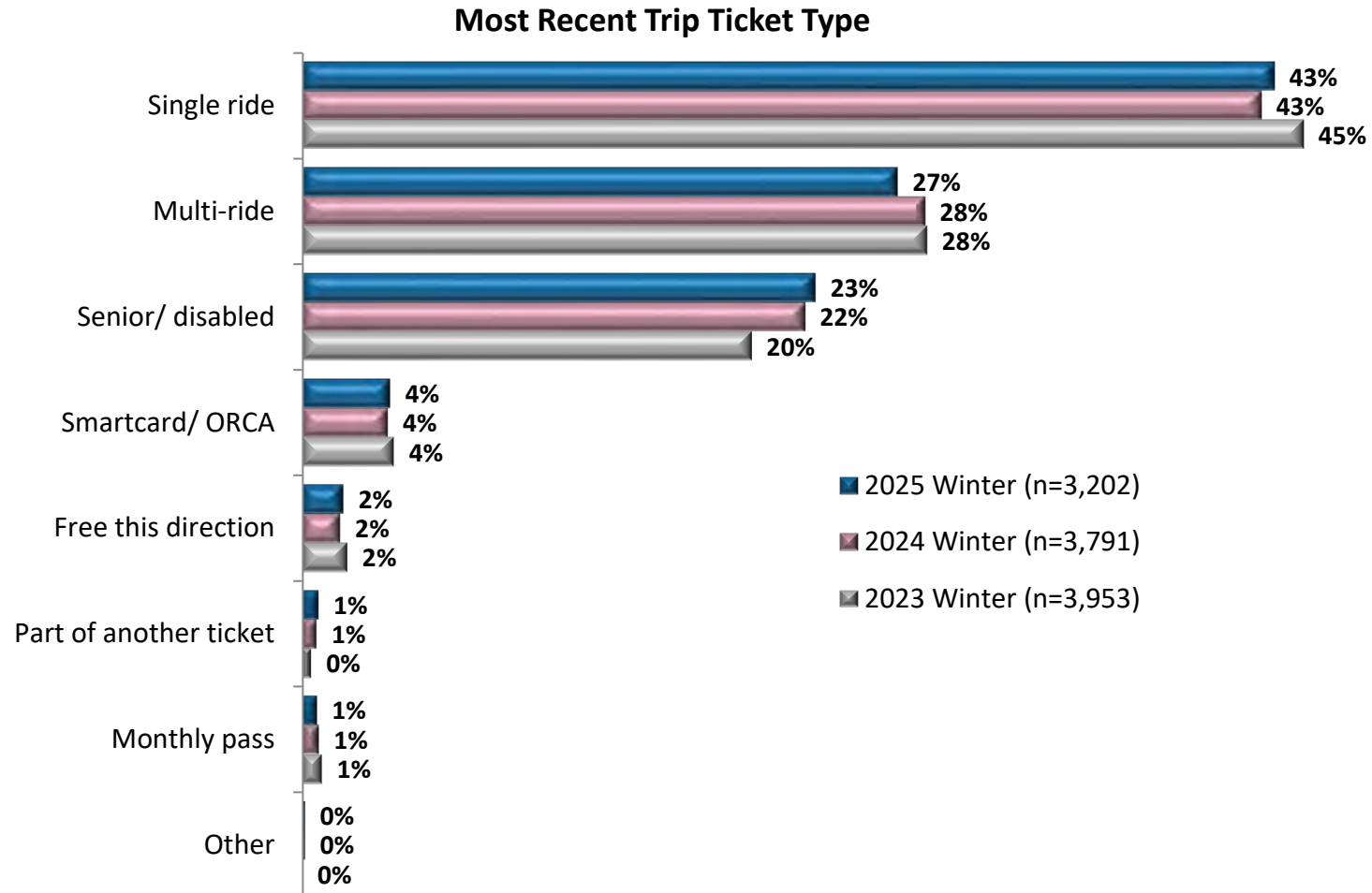
*In 2024 'shopping excursion' and 'everyday shopping' were combined into one response category of 'shopping trip.'

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 – Ticket Type and Purchase



Winter 2025 shows that single-ride and multi-ride ticket use held generally steady compared to last year while those traveling on a senior/disabled ticket has shown a significant increase compared to 2023 (and previous years). A majority of January to March riders report using a single ride (43%) or multi-ride (27%) ticket. Close to one in four (23%) report using a senior/disabled ticket – compared to one in eight (13%) in 2019 and 2018.



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



Multi-Ride Tickets

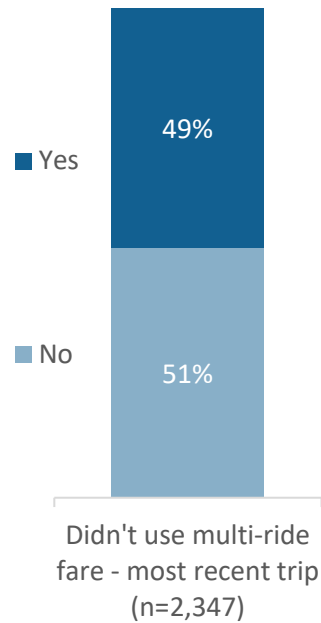
Multi-Ride Frequent Rider Ticket Usage



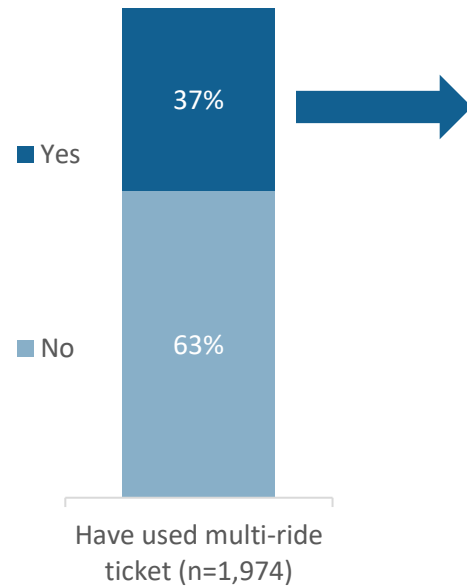
About half (49%) of those who did not use a multi-ride frequent rider ticket on their most recent trip have used a multi-ride ticket in the past.

Close to two fifths (37%) of multi-ride ticket users say they have decreased their use of multi-ride tickets compared to a year ago, primarily due to cost/value issues (net 38%) (expire before use, expensive, not a good value). Reduced WSF use is another reason – a lack of need or an overall reduction in trips (less ferry usage in general, commuting less, fewer appointments or obligations). One in seven (14%) mention reducing their usage due to service reliability issues.

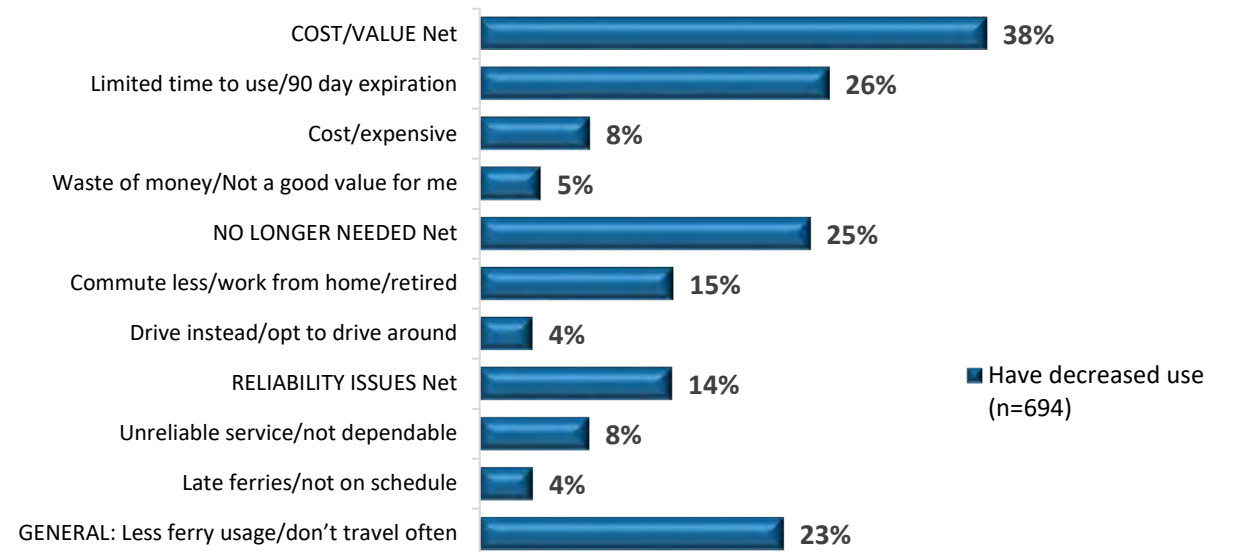
Have Purchased Multi-Ride Frequent Rider Tickets in the Past (Base: Did not use multi-ride ticket for most recent trip)



Decrease in Multi-Ride Ticket Purchases Over Past Year (Base: Used multi-ride ticket recent trip or in past)



Reasons for Decreasing Use of Multi-Fare Tickets (4% or greater mentions shown)



Q19B. (ASKED IF DIDN'T USE MULTI-RIDE TICKET MOST RECENT TRIP) The multi-ride fares are offered to give WSF frequent riders a discount in fares. Have you ever purchased one of these multi-ride frequent rider tickets in the past?

Q19C. (ASKED IF USED MULTI-RIDE TICKET ON MOST RECENT TRIP OR IN THE PAST) Compared to a year ago at this time, have you decreased your use of multi-fare tickets to pay your fare?

Q19D. (ASKED IF REDUCED USE OF MULTI-RIDE TICKET) Why have you decreased your usage of multi-fare tickets to pay your fare?

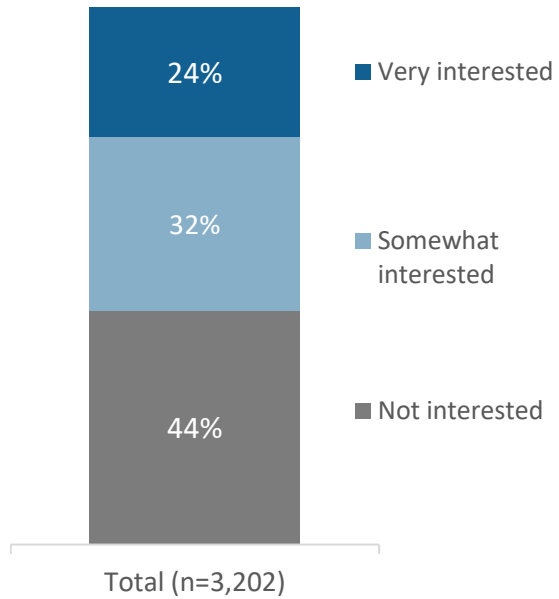
Note: Question added in 2024.

Level of Interest in a Potential Multi-Ride Ticket Options



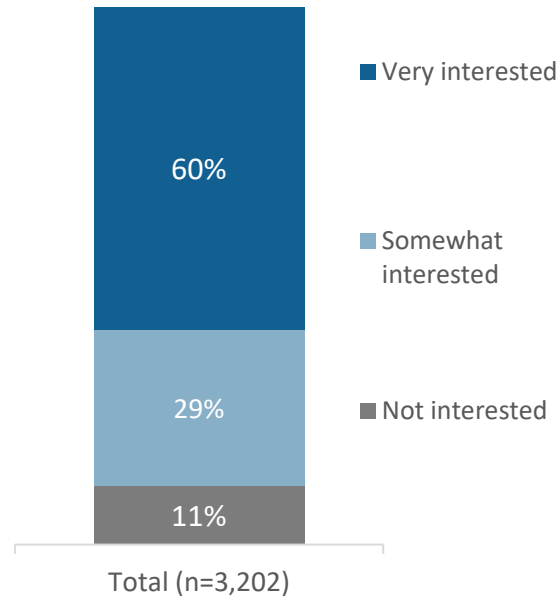
About one in four would be 'very interested' in a multi-ride ticket packet with fewer than 10 rides and the same 90-day duration, whereas three in five would be 'very interested' if the duration was extended beyond 90-days. Given the choice, riders 'very interested' in both were **over four times as likely** to state preference for a **multi-ride ticket packet of ten rides with a duration time longer than 90 days** than a packet with less than 10 rides and a 90-day duration.

Interest in Multi-Ride Ticket Packet with Fewer than 10 Rides, Same 90 Day Duration



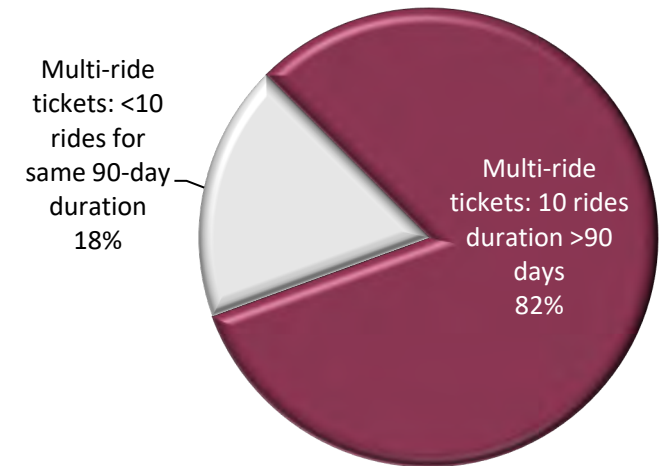
All respondents (n=3202) asked; n=217 said not sure/don't know – not included in chart.

Interest in Multi-Ride Ticket Packet if Duration was Extended Past 90 Days



All respondents (n=3202) asked; n=102 said not sure/don't know – not included in chart.

Preference Among Those 'Very Interested'



Very interested in both (n=684) asked; n=42 said not sure/don't know – not included in chart.

Note: Questions added in 2025.

- Q19E. Currently, a multi-ride ticket is purchased in packets of 10 and rides are good for 90 days. How interested would you be in purchasing multi-ride tickets that offered fewer than 10 rides for the same duration of time (90 days)?
- Q19F. How interested would you be in purchasing multi-ride tickets if the duration of time was extended past 90 days?
- Q19G. Which of the following would you prefer: Multi-ride tickets that offered 10 rides and a duration of time that was longer than 90 days OR Multi-ride tickets that offered <10 rides for the same duration of time (90 days)?



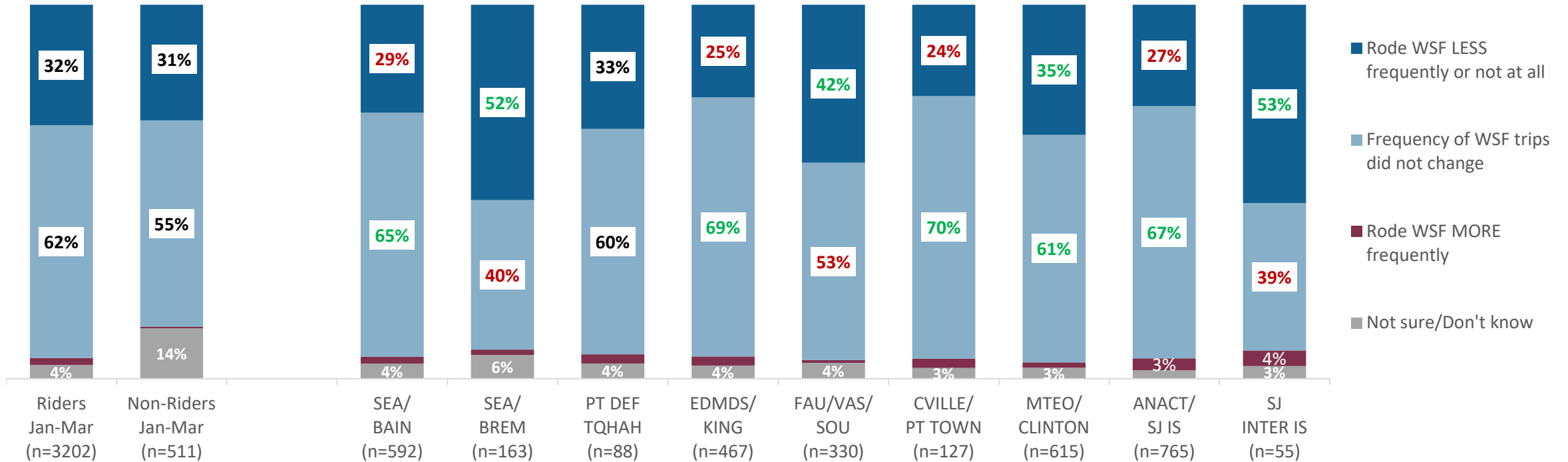
Impact of Service Constraints

Changes in Riding Behavior Due to Ferry Service Constraints



A third (32%) of riders say they rode WSF less frequently during the study period due to the ongoing ferry service constraints. (This is down from 44% in winter 2024.) Ridership impacts were most heavily felt on the Seattle/Bremerton and San Juan Inter-island routes, where about half report riding less frequently.

Changes in Riding Behavior in Response to Ferry Service Constraints



Green=Significantly higher / Red=Significantly lower than 3 or more other routes.

Q138. Given the ongoing ferry service constraints including vessel and crew availability, did you make any changes to your WSF riding behavior (including riding WSF less frequently or not at all) because of these constraints between January to March, 2025?

Impact on Trips – Among Rode WSF Less Frequently/Not At All



Those who changed their behavior by riding less frequently most commonly allowed more time to complete some trips, eliminated or consolidated their trips, or took an alternative form of transportation. It was less common to reschedule their trips to either earlier or later in the day. Riders on the Seattle/Bainbridge, Seattle/Bremerton, or Edmonds/Kingston routes were more likely to take an alternative form of transportation. Those on the Anacortes/SJ Islands and Inter-Island routes were more likely to consolidate their trips.

Among Those who Rode WSF Less Frequently or Not At All		Riders Jan-Mar (n=1007) vs Non-Riders Jan-Mar (n=158)									
		SEA/ BAIN (n=168)	SEA/ BREM (n=85)	PT DEF TQHAH (n=28*)	EDMDS/ KING (n=114)	FAU/VAS/ SOU (n=129)	CVILLE/ PT TOWN (n=35*)	MTEO/ CLINTON (n=216)	ANACT/ SJ IS (n=210)	SJ INTER IS (n=22*)	
Took alternative transportation on some trips	Riders Jan-Mar (n=1007)	64%	77%	17%	59%	42%	34%	39%	21%	7%	
	Non-Riders Jan-Mar (n=158)	42%	42%	17%	59%	42%	34%	39%	21%	7%	
Left earlier/allowed more time to complete some trips	Riders Jan-Mar (n=1007)	54%	34%	60%	34%	55%	30%	49%	46%	76%	
	Non-Riders Jan-Mar (n=158)	4%	4%	4%	4%	4%	4%	4%	4%	4%	
Didn't make some of the trips at all	Riders Jan-Mar (n=1007)	38%	37%	76%	41%	50%	50%	52%	46%	66%	
	Non-Riders Jan-Mar (n=158)	49%	49%	49%	49%	49%	49%	49%	49%	49%	
Made fewer trips (e.g. consolidated trips)	Riders Jan-Mar (n=1007)	39%	33%	50%	37%	48%	33%	48%	56%	70%	
	Non-Riders Jan-Mar (n=158)	13%	13%	13%	13%	13%	13%	13%	13%	13%	
Rescheduled some trips to an earlier day or time	Riders Jan-Mar (n=1007)	20%	33%	28%	25%	27%	11%	21%	29%	29%	
	Non-Riders Jan-Mar (n=158)	4%	4%	4%	4%	4%	4%	4%	4%	4%	
Rescheduled some trips to a later day or time	Riders Jan-Mar (n=1007)	13%	27%	39%	7%	18%	7%	22%	19%	21%	
	Non-Riders Jan-Mar (n=158)	4%	4%	4%	4%	4%	4%	4%	4%	4%	
Other	Riders Jan-Mar (n=1007)	4%	0%	1%	0%	2%	3%	5%	3%	0%	
	Non-Riders Jan-Mar (n=158)	18%	18%	18%	18%	18%	18%	18%	18%	18%	

*Caution: small sample size.

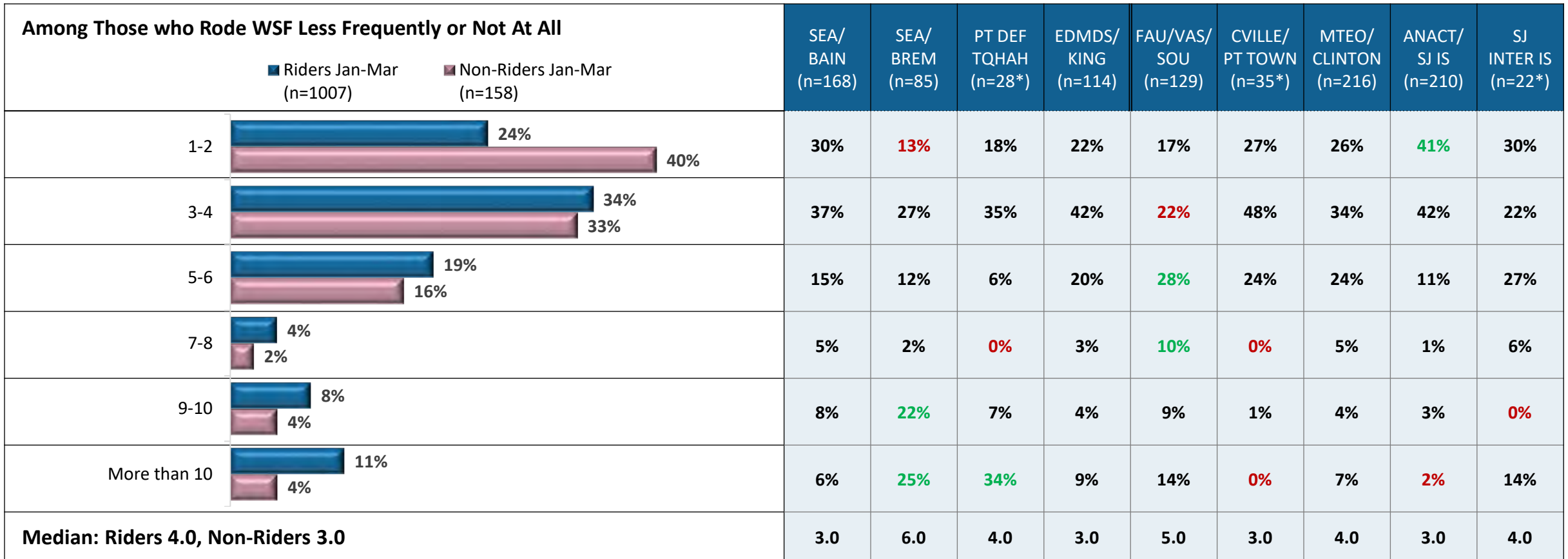
Green=Significantly higher / Red=Significantly lower than 3 or more other routes.

Q139A. You indicated that you rode WSF less frequently or not at all because of service constraints between January to March 2025. Which of the following describes how your trip(s) were impacted by the service constraints?

Reduction of Trips – Among Rode WSF Less Frequently/Not At All



Riders who changed their behavior by riding less frequently took, on average, four fewer trips because of service constraints, while non-riders eliminated around three trips, on average. Those on the Seattle/Bremerton route eliminated around six trips, on average, during this time. Riders on the Seattle/Bainbridge, Edmonds/Kingston, Coupeville/Port Townsend, and Anacortes/San Juan Islands routes eliminated the fewest trips.



*Caution: small sample size.

Green=Significantly higher/ Red=Significantly lower than 3 or more other routes.

Q139B. You indicated that you rode WSF less frequently or not at all because of service constraints between January to March 2025. Please estimate the number of ferry trips you did NOT take on WSF because of service constraints during this time period.

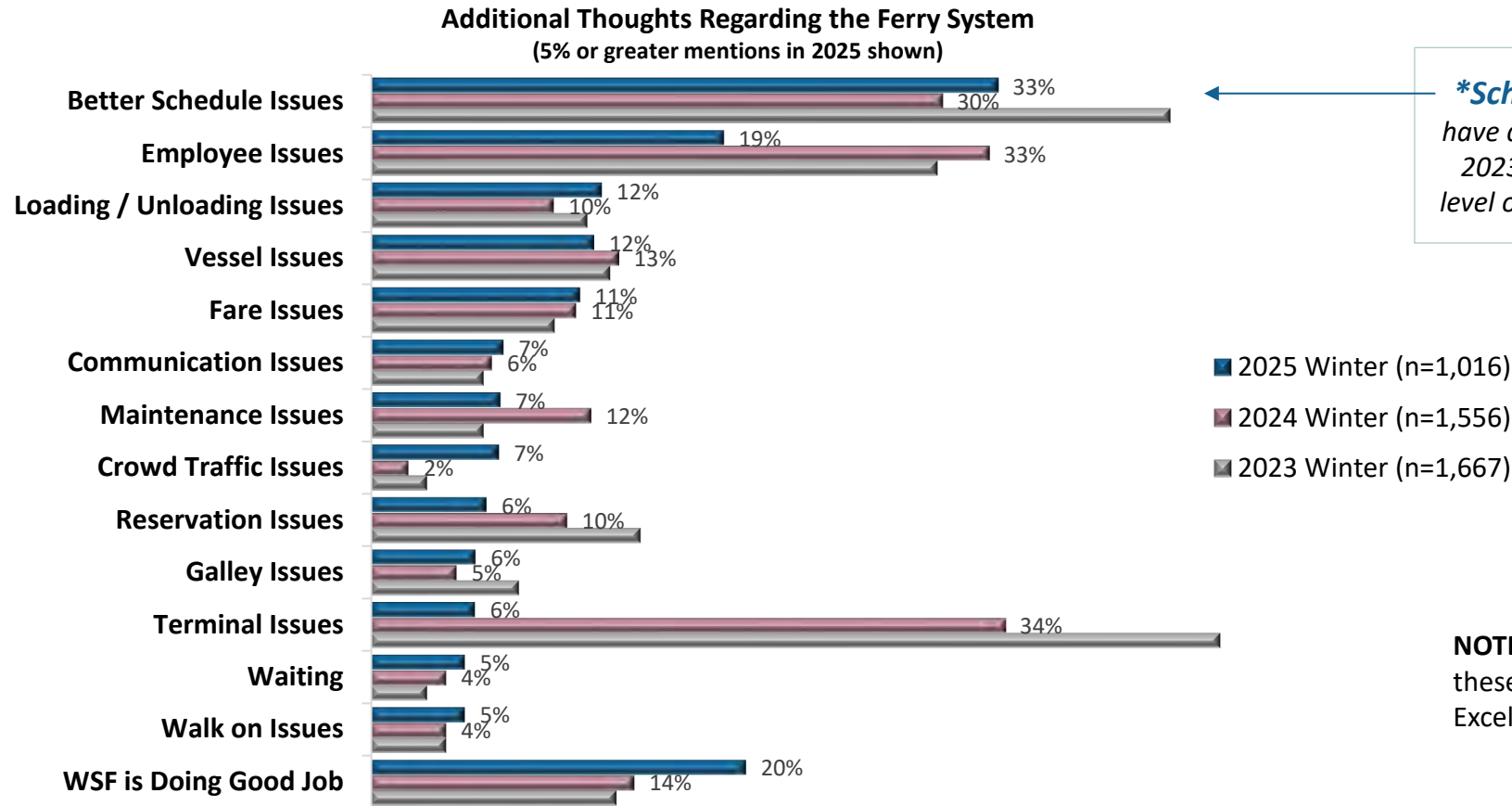


Additional Suggestions

Additional Thoughts Regarding WSF



A third of respondents (32%) offered additional thoughts regarding the ferry system. Among these, about a third mentioned scheduling issues (down 10-points from 2023). A fifth (19%) mentioned employee issues, (down significantly from one third (33%) in 2024). Relatively few (6%) mentioned terminal issues (down significantly from 34% in 2024 and 45% in 2023).



**Schedule issues comments have declined significantly since 2023, but still nearly twice 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.

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

What's Next in 2026



- ▶ Exploring revamping cadence and length of surveys – increase frequency & decrease length
- ▶ Focus on understanding what drives a positive experience (multi-variance analysis indicates we may not be capturing key drivers of overall satisfaction)
- ▶ Onboard experience surveys to take place in Summer of 2026

Questions?



THANK YOU!

For More Information Contact:

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360-705-7070