



Washington State Transportation Commission
WSF Summer Recreational & Performance Survey
2022 Results

FROG Panel and Research Background



- ▶ 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.
- ▶ In the Summer of 2022, survey personnel spent six weeks riding WSF, speaking to riders about FROG and signing riders up for the panel. Those who did not wish to sign up were asked to participate in a short computer-assisted interview about the use of WSF for recreational travel.
 - 1,339 recreational ferry riders completed the survey onboard the WSF during the summer onboard intercept period.
- ▶ In the Fall of 2022, all FROG panel members (including the new recruits who joined over the summer) were asked to participate in an online survey about the following topics:
 - Summer travel activity – ferry travel from June through September 2022.
 - Social and recreational – understand role of ferries in the social and recreational summer travel.
 - Customer satisfaction – measure satisfaction of terminal conditions, walk-on services, loading/unloading procedures, vessel conditions, and WSF website/telephone services.
 - Demographic characteristics of ferry customers – travel patterns, WSF satisfaction and demographic data.
- ▶ A total of 5,384 FROG ferry panel members completed the online survey, of these 4,847 were summer riders yielding a maximum confidence interval of +/- 1.4% at the 95% confidence level.



Key Findings

Key Findings: Continued Frustrations and Dissatisfaction



The impacts of the pandemic on WSF operations has led to a summer rider customer base that is less satisfied and more frustrated compared to 2018, as evidenced by rider ratings and comments.

OVERALL SATISFACTION

Overall satisfaction with the service provided by WSF decreased significantly in 2022 (compared to 2018).

Overall:

Overall satisfaction ('extremely satisfied' plus 'somewhat satisfied') was 41% in 2022, down from 62% in 2018. Half (52%) of respondents are *dissatisfied* overall (26% somewhat dissatisfied, 26% extremely dissatisfied). Dissatisfaction is highest on the Fautleroy/Vashon (82%), San Juan Interisland (76%), Anacortes/San Juan Islands (71%), and Point Defiance/Tahlequah (64%) routes.

OVERALL VALUE

Riders are also less inclined to see WSF as a good value.

Overall Value:

Systemwide, not quite half (45%) of riders say that WSF is a good value. This is down from 81% in 2018. This sentiment may be influencing riders' feelings about paying a fuel surcharge.

Key Findings: Website/Phone Usage is Up and Satisfaction is Down



CUSTOMER SERVICE TOUCHPOINTS

Website usage has increased, but satisfaction with the site has declined. While phone customer service usage is low, satisfaction levels provide opportunities for improvement.

WSF Website:

Most (83%) have used the WSF website and about two thirds (64%) say they are satisfied with their experience. This is a decline in satisfaction compared to 2018.

One in six (16%) report dissatisfaction with this touchpoint, with “misleading information” by far the number one complaint.

Example user comment: *“Website periodically goes down abruptly for unknown reasons. Website doesn't reflect accurate information. Website doesn't reflect current conditions (e.g., number of drive-up spaces, accurate present location of vessels...sometimes not showing them at all...)”*

WSF Phone Customer Service:

About one in thirteen (8%) riders have contacted WSF customer service by phone (no change from 2018). While three in five (61%) are satisfied, one in four (24%) are dissatisfied with their experience.

Top reasons for dissatisfaction include: no answer at all (35%), unresolved issues (25%), long hold times (18%), and customer service issues (16%).

Example caller comment: *“Multiple times I would call to get help with a reservation, as the website wasn't working, and I never got through.”*

Key Findings: Some Things Improved



SOME THINGS IMPROVED

Rider satisfaction with terminal comfort and easy loading and unloading for walk-ons is higher compared to 2018. Satisfaction with loading crews and vessel maintenance is unchanged.

Terminals are comfortable

Satisfaction with terminal comfort improved compared to 2018, with fewer dissatisfied on most routes. System-wide, just under one in five (18%) are dissatisfied in summer 2022 (down from 28% in 2018). When it comes to unsatisfactory terminals, the Seattle terminal, by far, receives the highest level of unsatisfactory ratings

WSF provides easy loading & unloading for walk-ons

Satisfaction with easy loading and unloading for walk-ons improved compared to 2018, with fewer dissatisfied on about half of the routes. System-wide, just one in eleven (9%) are dissatisfied in summer 2022 (down from 13% in 2018). Dissatisfaction is highest on the San Juan Interisland (21%) and Seattle/Bainbridge (16%) routes.

Loading crews provide clear directions/signals

Satisfaction with WSF loading crews providing clear directions is generally unchanged since 2018. System-wide, one in nine (11%) are dissatisfied in summer 2022. Dissatisfaction is highest on the San Juan Interisland (27%), Point Defiance/Tahlequah (22%), and Fauntleroy/Vashon (21%) routes.

WSF Vessels are well maintained and safe

Satisfaction with WSF vessels being well maintained and safe is generally unchanged since 2018. System-wide, one in fourteen (7%) are dissatisfied in summer 2022. Dissatisfaction is highest on the San Juan Interisland (21%) and Point Defiance/Tahlequah (11%) routes.

Key Findings: Fuel Surcharge



FUEL SURCHARGE

Given their current levels of frustration and dissatisfaction, riders tend to be against a fuel surcharge, viewing it as being asked to pay *more* when they feel they are getting *less*.

- More riders object to the idea of a fuel surcharge than support one (41% to 32%). One in four are *strongly against* the idea.
- Only one in ten think WSF riders should pay a surcharge on their own, while a third of riders think unfunded fuel costs should be funded in part by a rider surcharge and in part by tax payers. *Two fifths would like to see the tax payers statewide pay for any un-funded fuel costs.*

“You cannot expect riders to cover your cost of fuel when you cannot even operate their ferries at a full and efficient capacity... These are Washington State ferries. Use the taxes that are already being collected. This is a utility not a business and a non-optimal functioning one at that. Fix your punctuality, fix your Captains running into docks, fix your workforce, fix your fleet. When any of that comes up to a reasonable level of service and utility the topic of fuel surcharge can be broached.”

- Seven out of ten (72%) would be willing to pay up to 2.5% and 49% would pay up to 5% more to cover fuel funding shortfalls; however, it is important to note that 28% are adamant they should not be asked to pay a fuel surcharge at all.

“You should get your service together before thinking of any fare increase... It's ridiculous how often we've been down to one ferry this year. I go to a doctors appointment and not sure if I'll make it home before 10pm. The Vashon route is our only way to get off Island. Roads are built with funds from the whole state. The fuel surcharge is just a chicken (expletive deleted) way to raise fares; but be able to blame it on something else. Get your act together, raise staffing levels, and then ask users for more money. It's offensive to give (poor) service and ask for more.”

- Riders who might support a fuel surcharge would like assurances that it will be temporary.

“You mentioned that a fuel surcharge would be temporary. How will you decide when to end the fuel surcharge? Is there a hard date when the surcharge would end? This is important information for me to support the addition of a surcharge.”



Intercept Interviews: Onboard Recreational Surveys

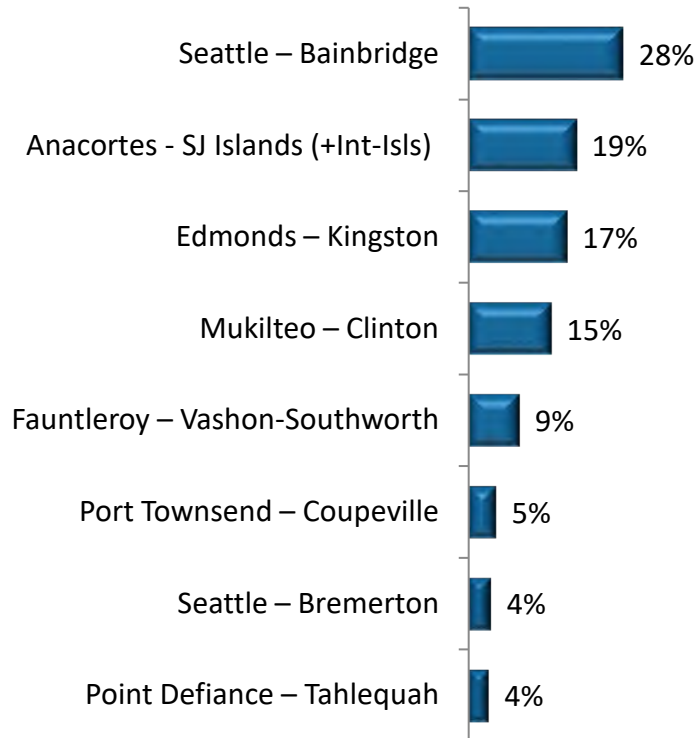
Route of Recreational/Social Trip, Change Since Before Covid-19



Nearly a third said their recreational/social trips using WSF had decreased compared to 2019 (pre-pandemic), while only one in seven said their recreational/social trips had increased.

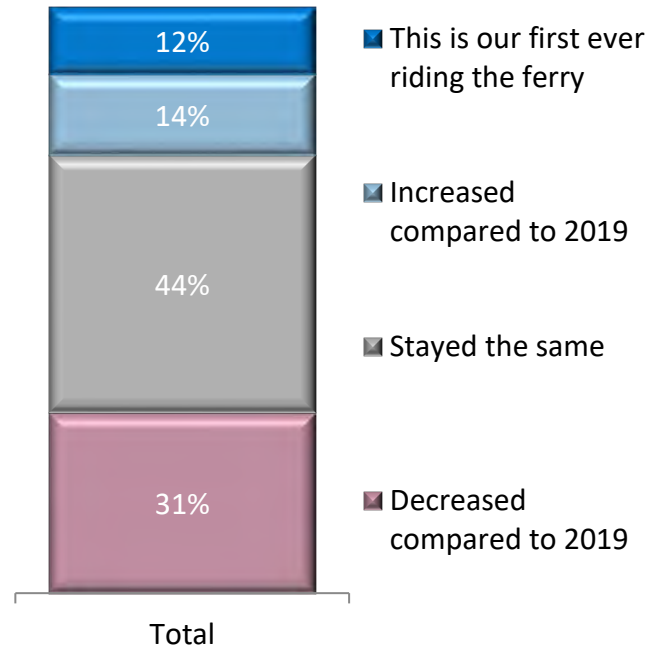
Route of Recreational/Social Trip

n=1,339



Change in Recreational/Social Trips Since Before Covid-19 Pandemic

n=1,092



Q25. Record route.

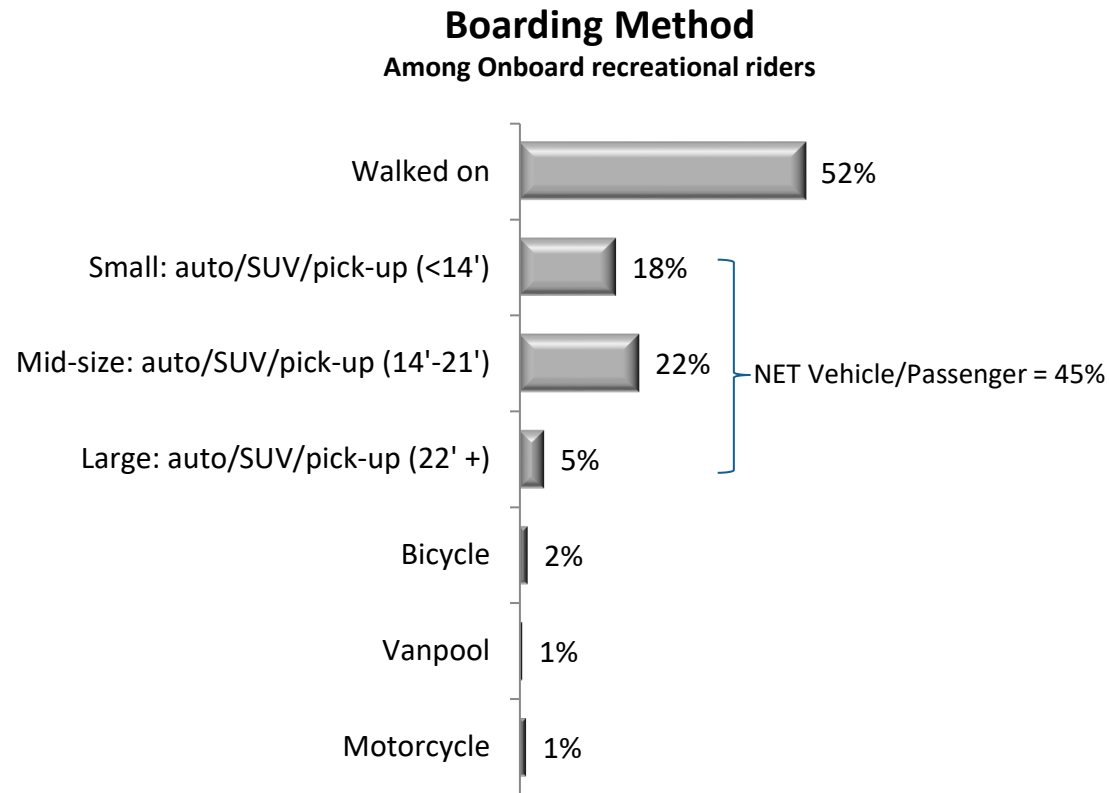
Q14. Compared to summer of 2019, before the COVID-19 pandemic, has the number of your recreational or social trips where you use the Washington State Ferries increased, stayed the same or decreased?

Boarding Method



Walk-on riders account for half (52%) of all intercepted recreational riders. Walk-on ridership is highest on the Seattle/Bremerton (68%) and Seattle/Bainbridge (64%) routes. Most of the remainder boarded in a vehicle – primarily small (<14 feet) (18%) or mid-size (14-21 feet) (22%).

When compared to 2018, more walk-on passengers (and fewer vehicle/driver passengers) were intercepted in 2022.



2018 Onboard recreational drivers

Onboards: Vehicle Driver/Passenger	58%
Onboards: Walk-on	39%
Onboards: Bike on	2%
Onboards: Motorcycle	1%



Photo: Kevin Clark/The Herald

Base: Onboard Survey Total Respondents: n=1067 responding

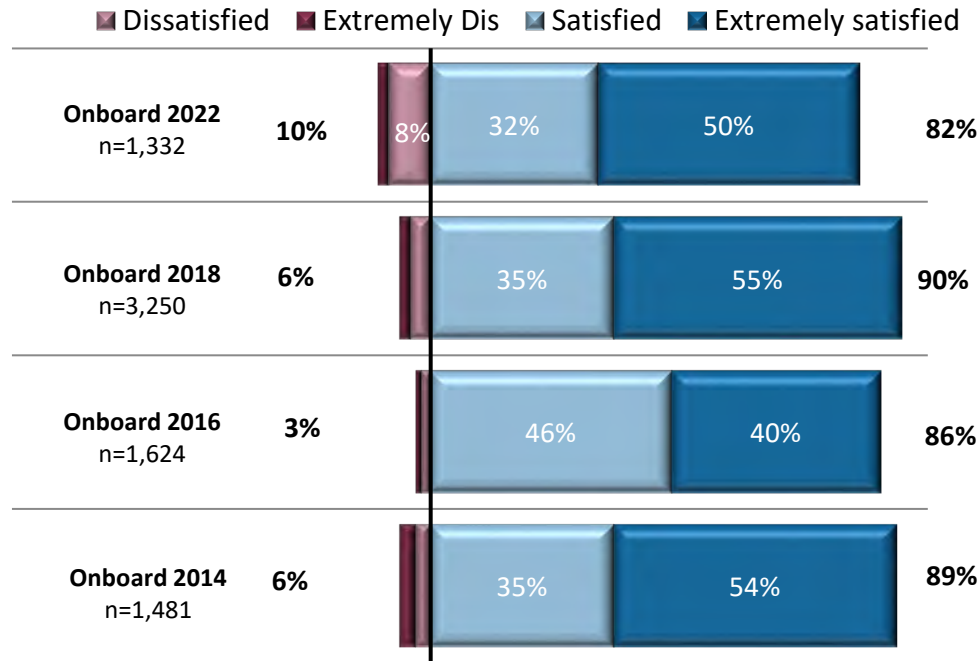
Q19. Approximately, what size vehicle, if any, did you drive on to the ferry today?

Overall Satisfaction

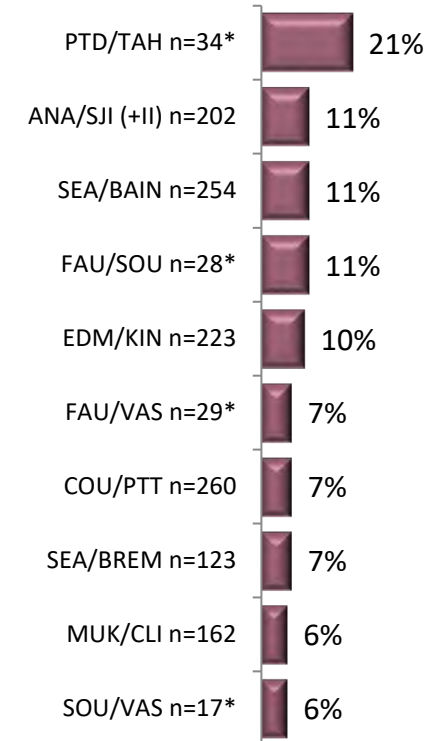


The percentage of Onboard survey respondents saying they are satisfied with the level of service provided by WSF so far is somewhat lower compared to 2018 (82% net satisfied vs. 90% in 2018). Dissatisfaction is highest on the Point Defiance/Tahlequah route (21%).

Overall Satisfaction with WSF



Overall Dissatisfaction by Route (Onboard – Total Dissatisfied – 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 represents the corresponding total dis/satisfaction
 Percentages 3% or less not labeled on chart.

Base: Onboard Survey Total Respondents: n=1332 responding

*Interpret with caution, small sample size.

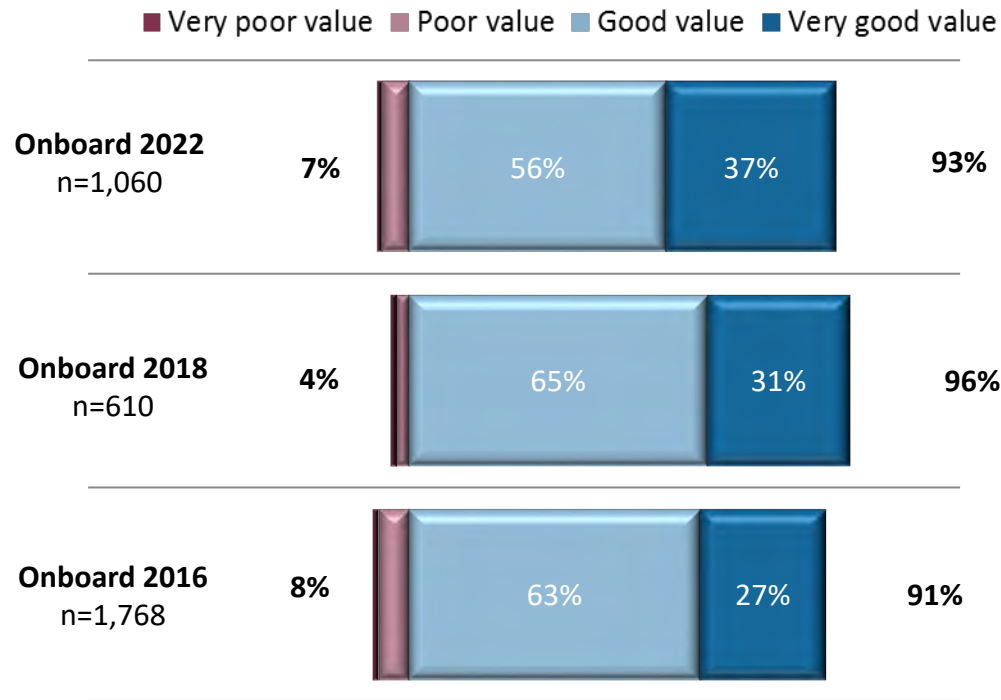
Q13. All things considered, how satisfied are you with the service provided so far by Washington State Ferries? Would you say you are ...

Overall Value



Onboard intercepted riders considering WSF a “good” or “very good” value in 2022 is very similar to 2018 and 2016, with just over nine in ten considering it to be a good value (net). The one route that received a lower value rating than the others is Point Defiance/Tahlequah, although three in four still give it an overall good value rating.

Overall Perceived Value of WSF



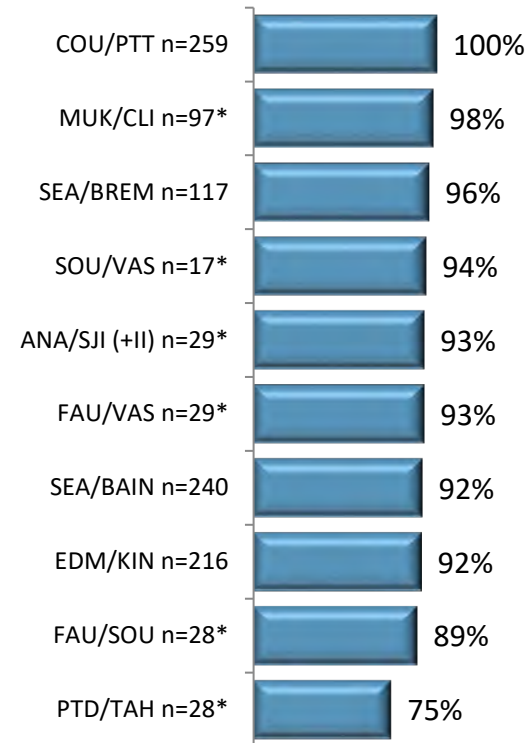
Only ratings of good or poor are shown, don't know responses are not shown.
The **bold** percentages represents the corresponding total good/poor value
Percentages 8% or less not labeled on chart.

Base: Onboard Survey Total Respondents: n=1060 responding

*Interpret with caution, small sample size.

Q20. All things considered, for the price, do you feel that Washington State Ferries is ...

Overall 'Good Value' by Route (Onboard – Very good + Good value – 2022)

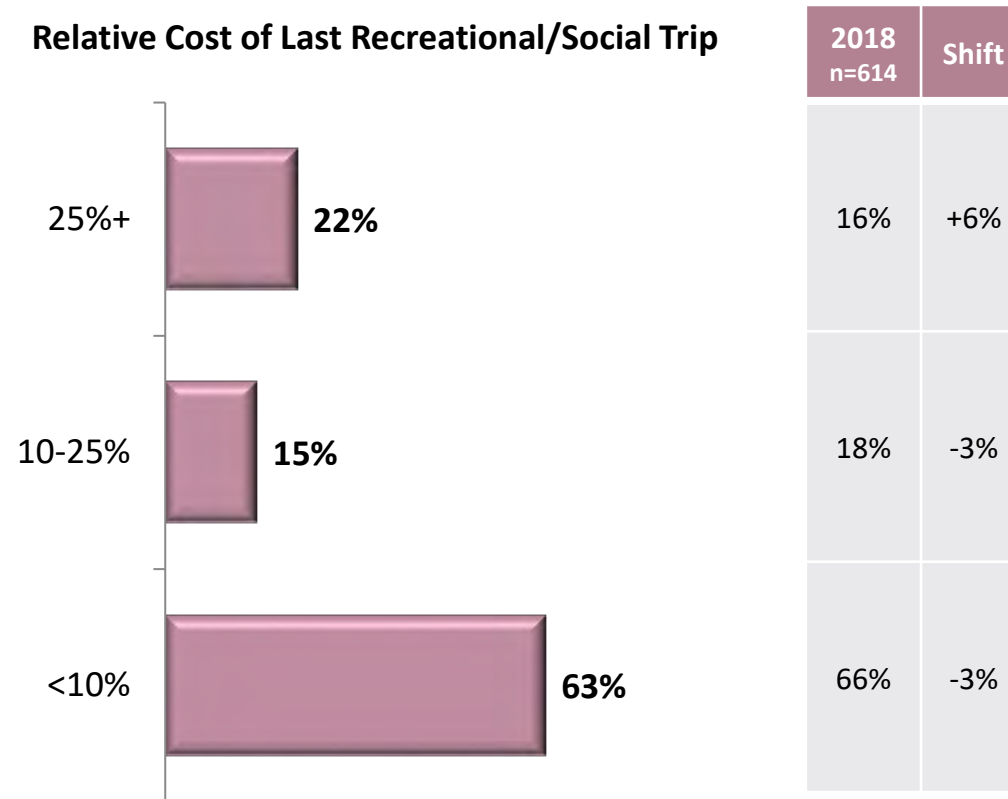


Relative Ferry Cost



Two thirds of riders intercepted onboard say that the ferry fare as a percent of total recreational/social trip cost is less than ten percent (similar to 2018). Just over one in five say the ferry fare is twenty-five percent or more of the cost of their trip. This compares to about one in six who said so in 2018.

Relative Cost of Last Recreational/Social Trip



Base: Onboard Survey Total Respondents: n=1071 responding

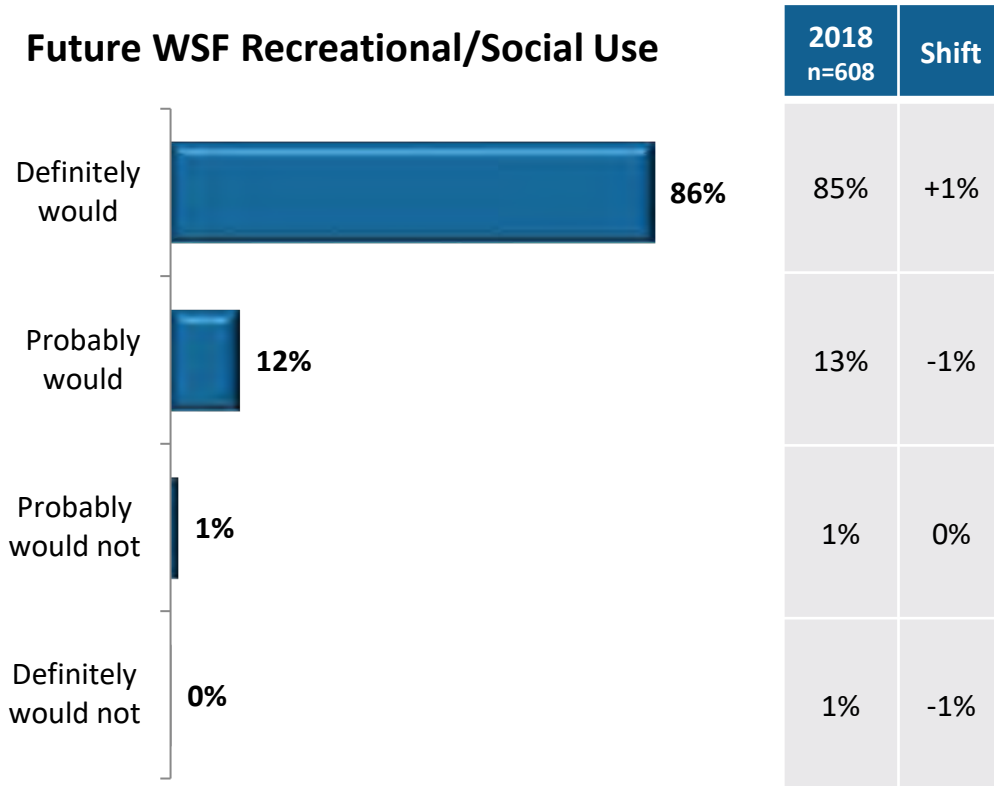
Q17. Roughly what percentage would you guess the cost of this ferry ride will be of the total cost of this recreational or social trip, when you figure in gas, food, lodging, etc.?

Would you say the ferry fare will account for ...

Future Recreational/Social Use



Almost all respondents (98%) say they are likely to use WSF again for their next recreational or social trip – nearly nine in ten say they “definitely would” do so.



Base: Onboard Survey Total Respondents: n=1060 responding

Q21. How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you ...



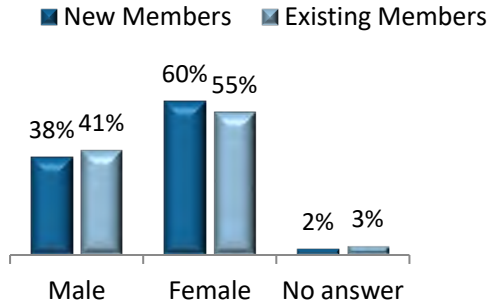
Summer Sample Demo Comparison: New vs. Existing FROG Panel Members Responding

Summer Sample Demo Comparison – New vs. Existing Members

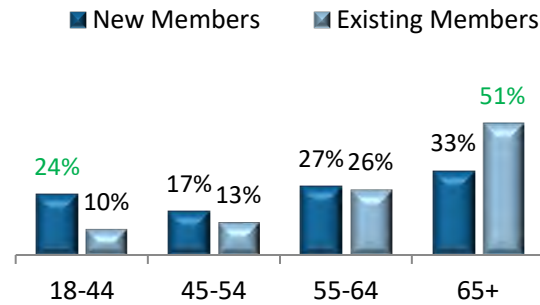


The demographic profile of the responding new panel member (recruited during Onboard intercepts) is similar to the existing panel member, with the following differences: new members are likely to be younger and to have higher household incomes. (All statistically significant differences highlighted in green text.) (New Members Responding n=593, Existing Members Responding n=4,254)

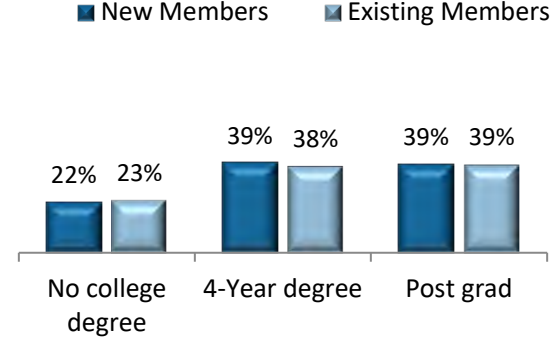
Gender



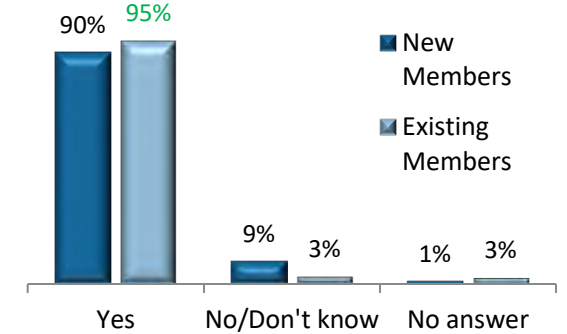
Age Category



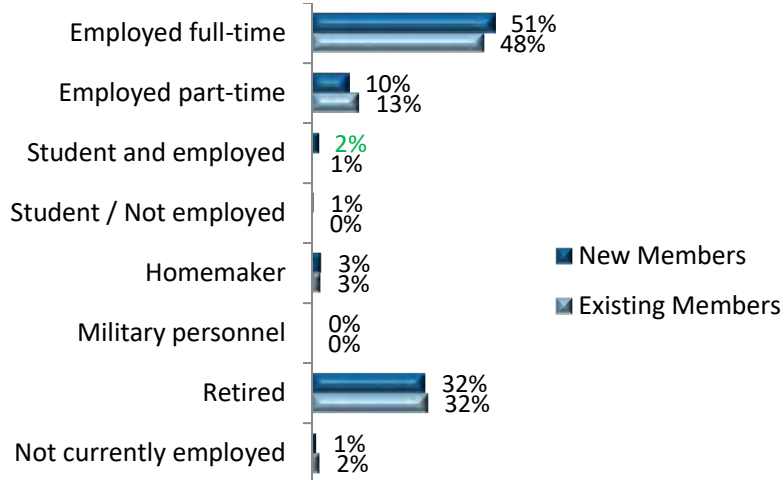
Education



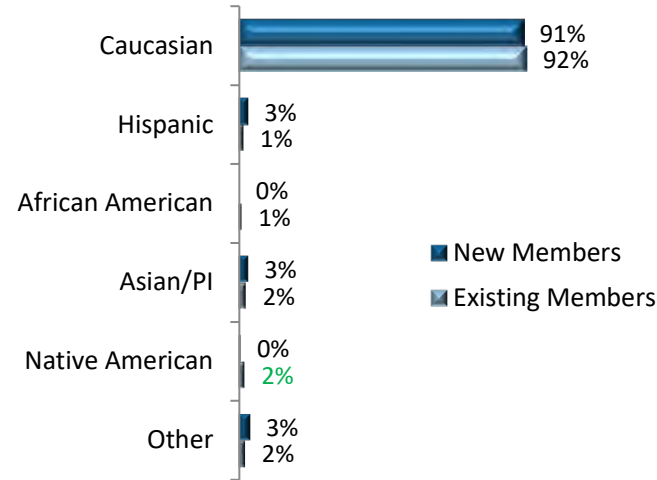
WA Voter Registration



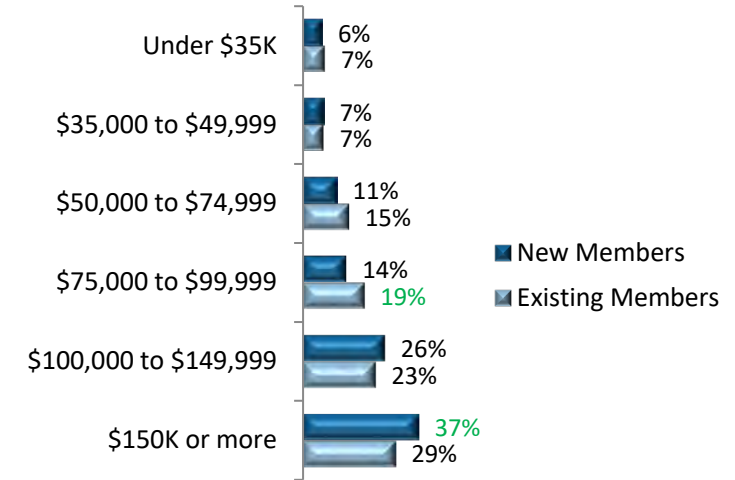
Employment Status



Ethnicity



Annual HH Income





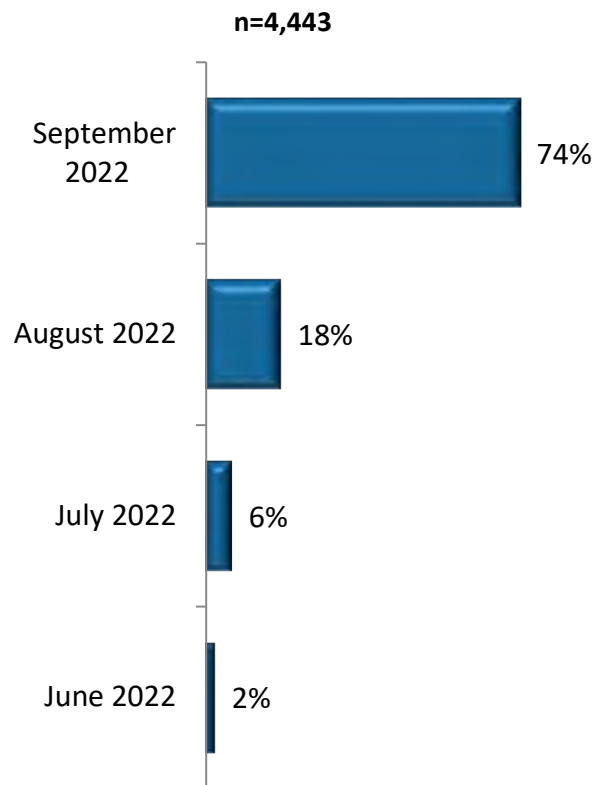
FROG Panel: Recreational & Social Travel During Summer Period

Last Recreational/Social Trip



The majority of FROG riders' most recent recreational/social trips took place in September, with Seattle/Bainbridge, Mukilteo/Clinton, and Edmonds/Kingston leading as the last recreational routes ridden. This was also the case in 2018 and 2016, showing little change in routes riders use for recreational/social trips.

Month of Summer Recreational/Social Trip



Route of Last Recreational/Social Trip

n=4,443

Route	2022	2018	Shift
Seattle/Bainbridge	26%	23%	+3%
Mukilteo/Clinton	18%	15%	+3%
Edmonds/Kingston	17%	17%	0%
Anacortes/San Juan Islands	12%	11%	+1%
Fauntleroy/Vashon	7%	7%	0%
Seattle/Bremerton	5%	12%	-7%
Coupeville/Port Townsend	5%	6%	-1%
Point Defiance/Tahlequah	4%	2%	+2%
Fauntleroy/Southworth	2%	4%	-2%
Southworth/Vashon	1%	1%	0%
San Juan Interisland	0%	1%	-1%

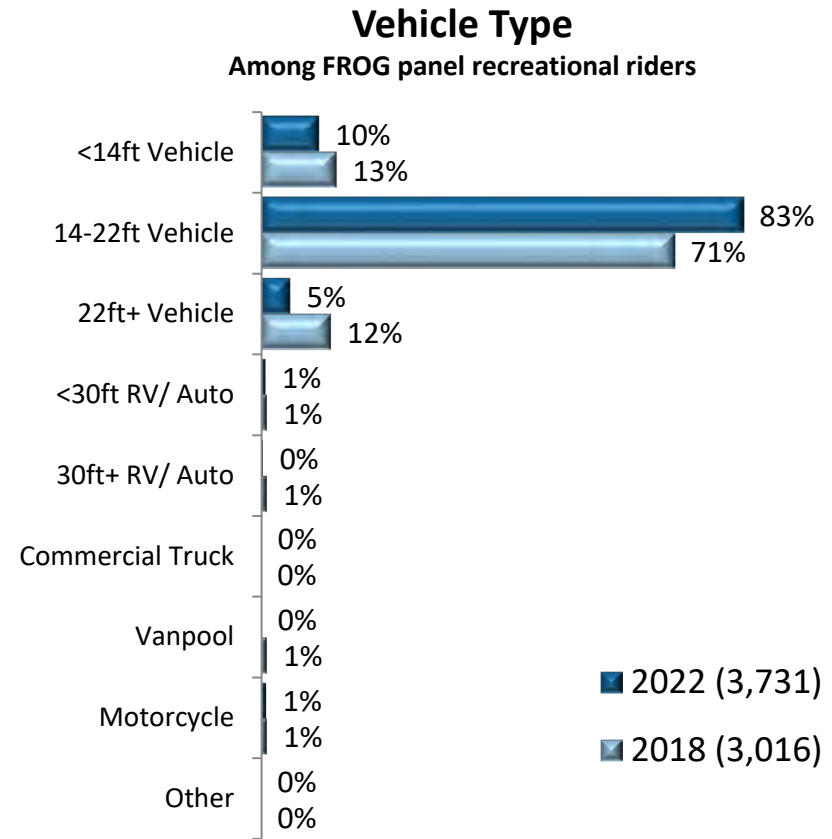
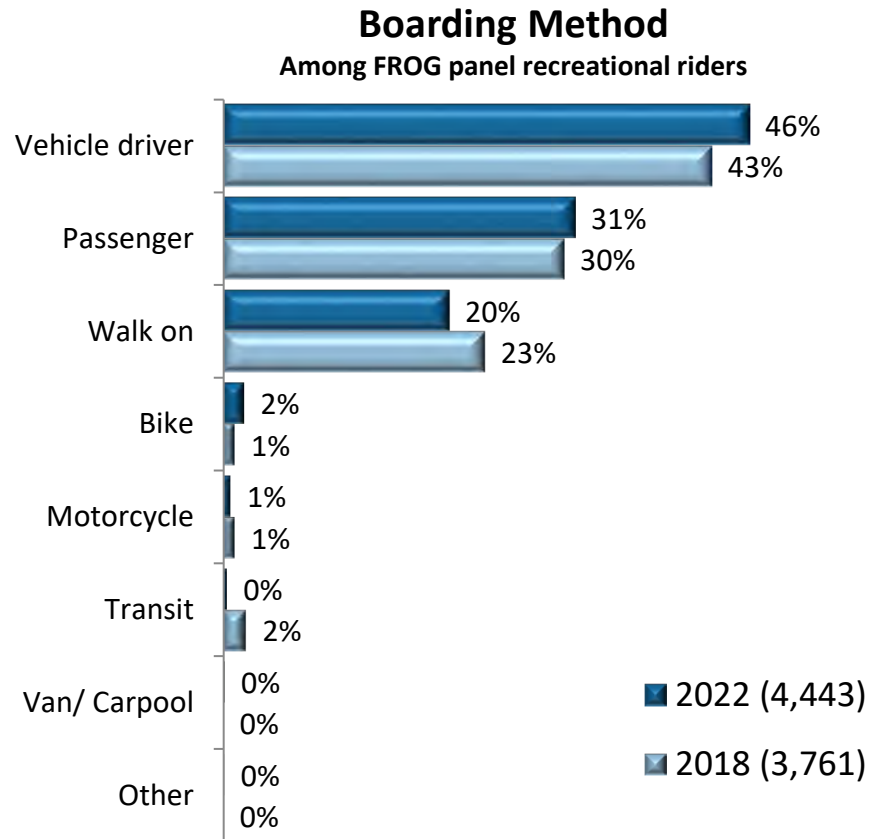
Q2. In which month did you take your most recent recreational or social trip that used WSF (of those using WSF during summer period)?

Q3. What was the route that you rode for your most recent recreational or social trip?

Boarding Method



Boarding method patterns remain consistent with 2018. The majority (77%) of summer recreational riders boarded as either a vehicle driver or passenger. Walk-on riders account for one in five (20%) of all recreational riders, similar to 2018.



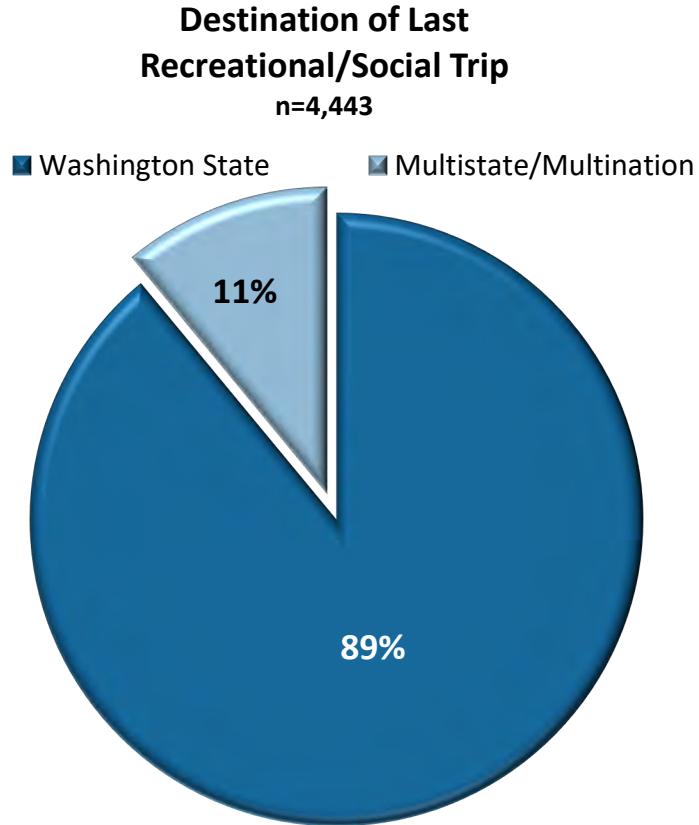
Q5. How did you board your last ferry ride? (Multiple Response)

Q6. Which of the following best describes the vehicle you drove on the ferry?

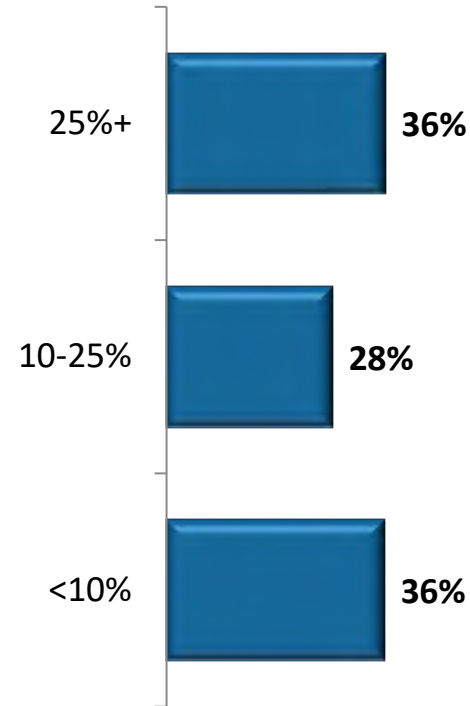
Destination & Relative Ferry Cost



Nine out of ten say their most recent recreational or social trip was a Washington State only trip. (This was the case in 2018 as well.) While more than a third (36%) say the ferry fare is twenty-five percent or more of the cost of their trip, equal numbers say the fare is less than ten percent of their trip cost. The breakdown of the ferry fare as a percentage of the total trip cost is very similar to 2018.



Relative Cost of Last Recreational/Social Trip



	2018 n=3,761	Shift
25%+	36%	0%
10-25%	29%	-1%
<10%	36%	0%

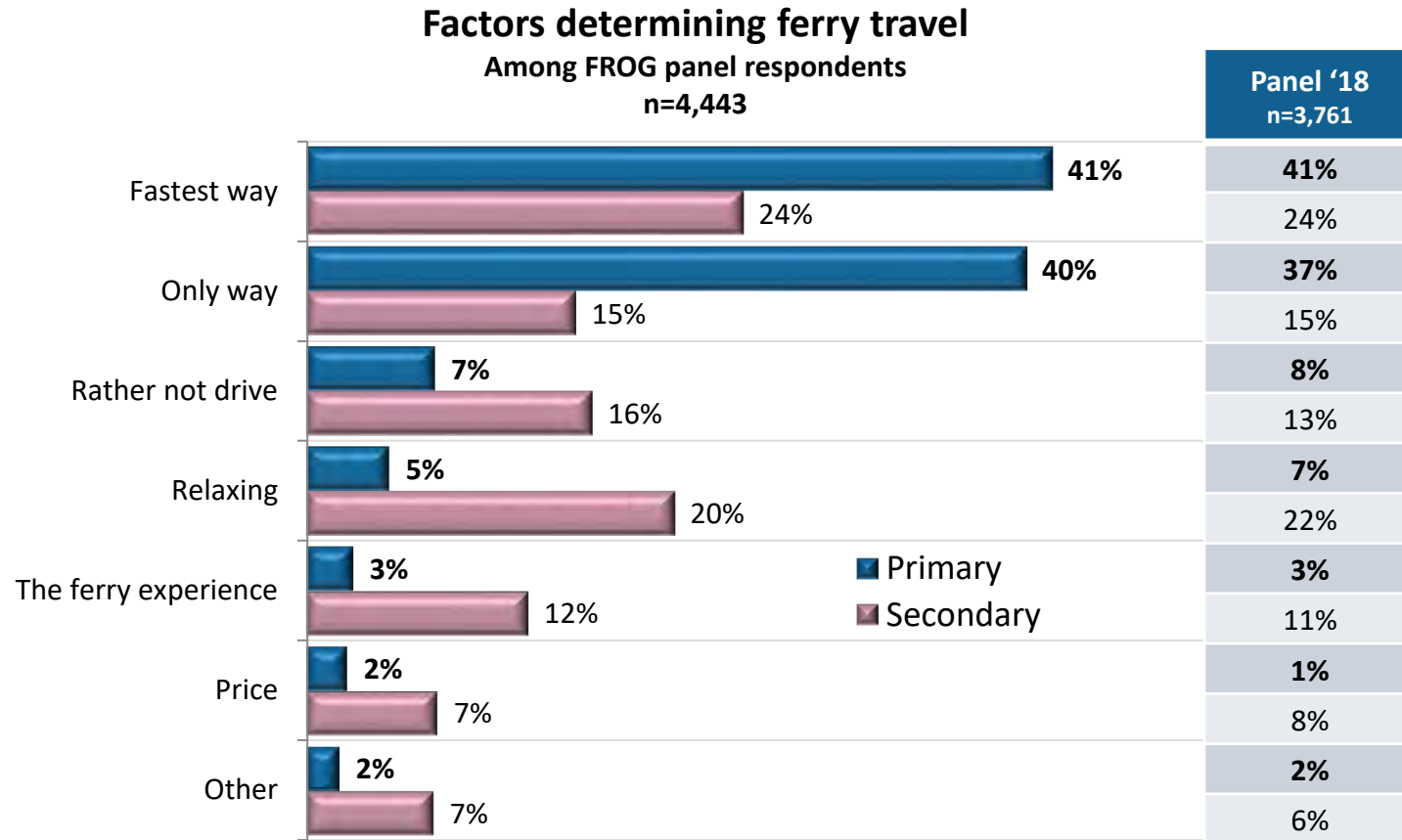
Q13. Was your most recent recreational or social trip part of a...?

Q14. How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent trip?

Factors Driving Ferry Decision



The primary reasons for choosing WSF for their recent recreational or social trip continue to be that it is either the “fastest way” or the “only way.” Secondary reasons are that the ferry provides a “relaxing way to travel” and an option for those who would “rather not drive.”



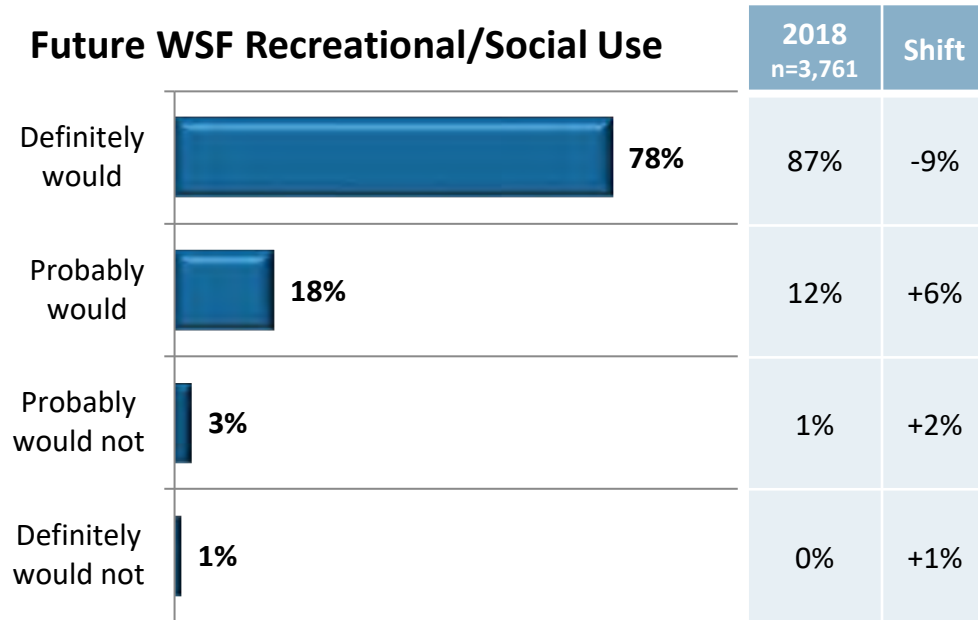
Q15a. Which of the following reasons best describes why you chose WSF rather than some other way to make your most recent recreational or social trip?

Q15b. Which other reasons describe why you chose WSF rather than some other way to make your most recent recreational or social trip? (Multiple Response)

Future Recreational/Social Use



Nearly all respondents (96% net) are likely to use WSF again for a recreational or social trip, although this year there is a 9-point drop in the percentage who say they “definitely would” compared to 2018. Likelihood of using WSF again for these types of trips is high across routes.



	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANACT/ SJ IS	SJ INTER IS
2022 Respondents	4443	664	221	126	605	299	104	35*	285	794	1265	45*
Top 2 Box – Percent who “definitely” or “probably” would use WSF again	96%	97%	96%	96%	95%	93%	97%	98%	98%	96%	92%	84%

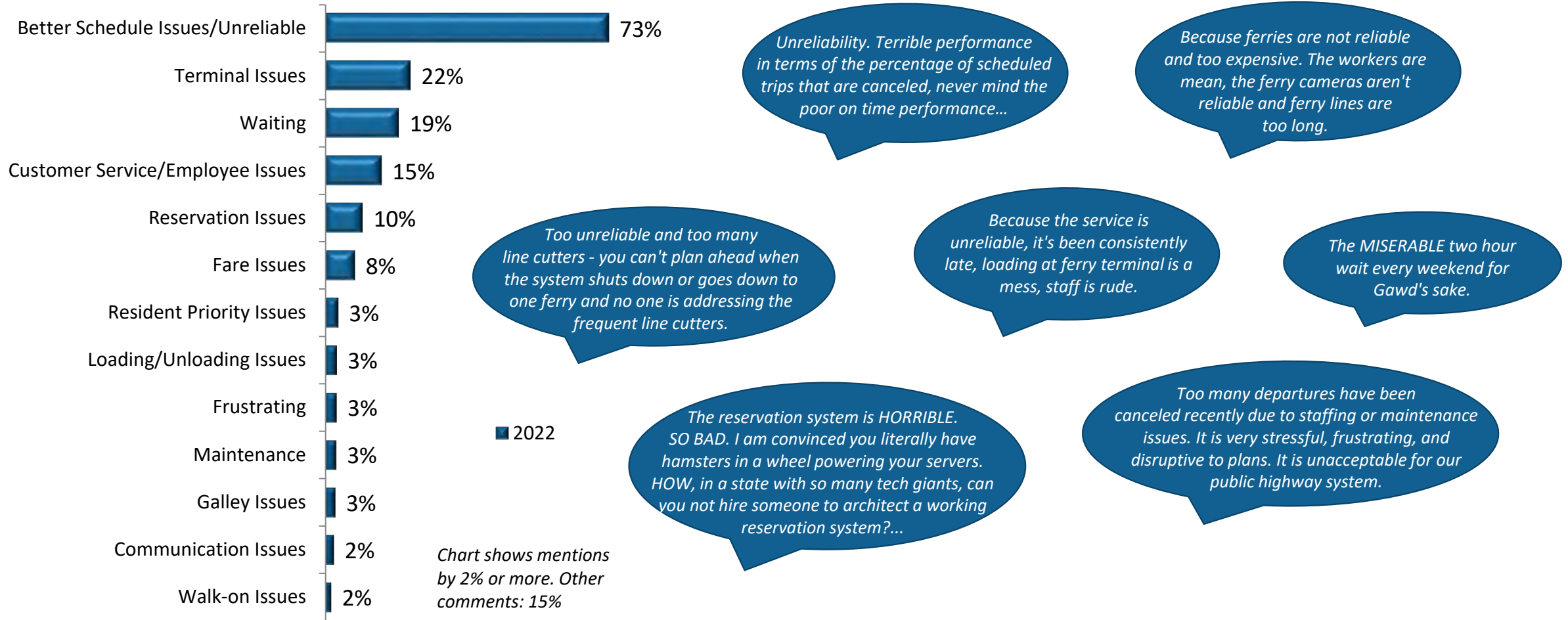
*Interpret with caution, small sample size.

Q16. How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...?

Unlikely to Use WSF for Future Recreational/Social Trips



The top reasons mentioned by riders unlikely to use WSF for future recreational or social trips centered around scheduling problems/unreliability, issues at the terminal(s), long wait times, customer service/employee/staffing issues, and issues getting reservations.



Q17. Why would you NOT consider using the Washington State Ferries again? (Unlikely to use WSF again for recreational or social trip, n=262)



FROG Panel: Summer Travel Activity

Summer Period Ridership Overall



The routes with the highest ridership are Seattle/Bainbridge (39%) and Edmonds/Kingston (35%) (also the leaders in 2018). Seattle/Bremerton saw the largest dip in ridership at only 11%. Though route ridership is down in absolute terms, average number of trips per rider per route increased when compared to 2018.

	Route Ridership n=4,847	Route Ridership		Average # of Trips	Average # of Trips	Shift in # Trips
		2018 n=4,691	Shift	2022	2018	
Seattle/Bainbridge	39%	43%	-4%	8.5	5.6	+2.9
Edmonds/Kingston	35%	39%	-4%	6.1	4.1	+2.0
Mukilteo/Clinton	24%	21%	+3%	11.4	6.7	+4.7
Anacortes/SJ Islands	19%	18%	+1%	4.8	2.3	+2.5
Coupeville/Pt. Townsend	18%	23%	-5%	2.8	2.0	+0.8
Fauntleroy/Vashon	13%	13%	0%	12.3	7.5	+4.8
Seattle/Bremerton	11%	21%	-10%	6.6	6.5	+0.1
Point Defiance/Tahlequah	10%	9%	+1%	9.8	4.6	+5.2
Fauntleroy/Southworth	7%	9%	-2%	7.2	5.4	+1.8
Southworth/Vashon	6%	8%	-2%	5.2	3.3	+1.9
San Juan Interisland	4%	5%	-1%	3.7	2.2	+1.5

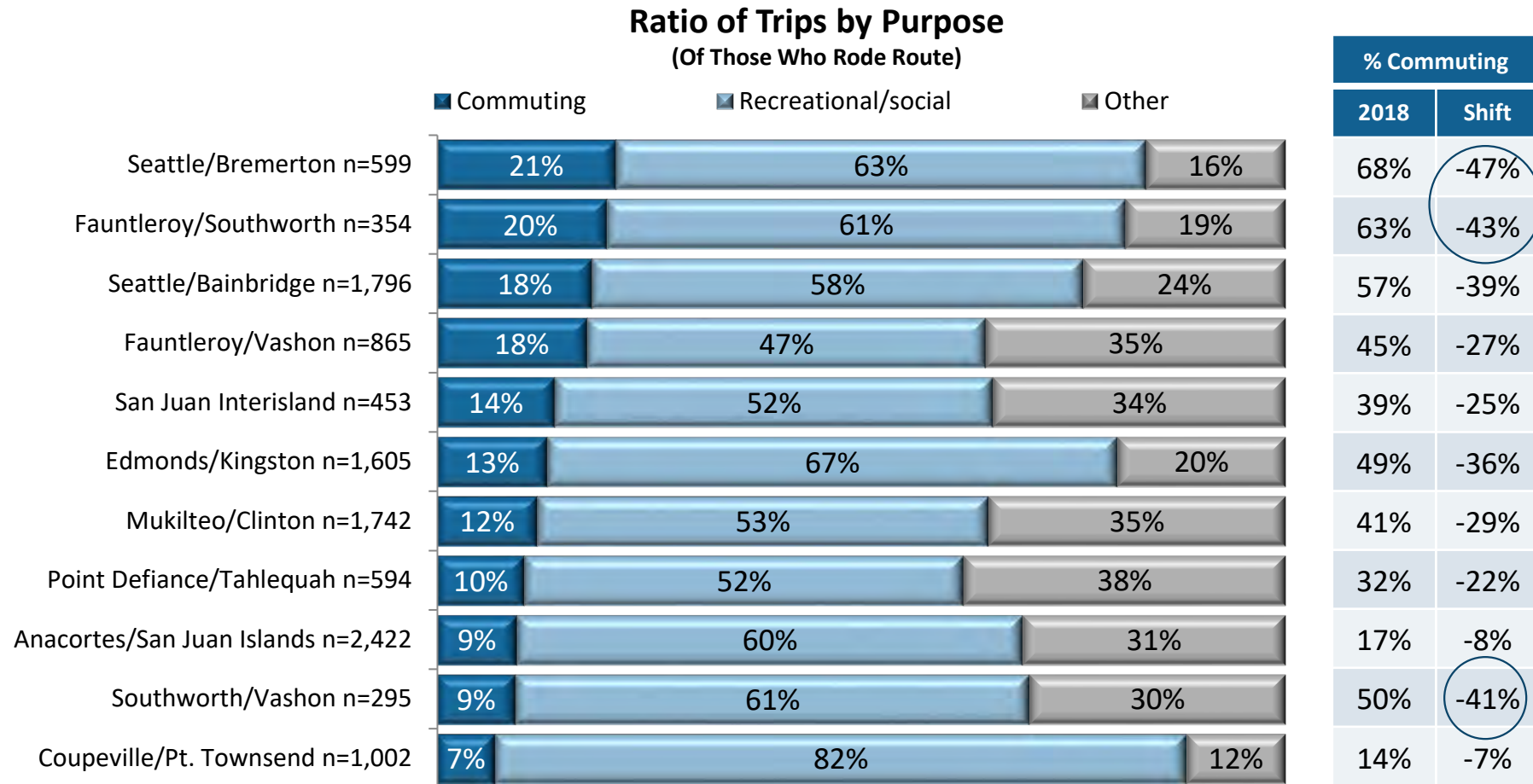
Q21. Which of the following route(s) have you ridden for any purpose during the Summer period? (Multiple Response)

Q22. How many round trips (1 one-way = .5 round trip; 2 one-way = 1 round trip) did you take per month, on average, during the summer period?

Ridership – Commuting Trips



Results from 2022 show a dramatic decline in the portion of summer trips being taken for the purpose of commuting compared to 2018, brought on by the pandemic and its impacts. The largest drops in commuting trips were experienced on the Seattle/Bremerton, Fautleroy/Southworth, Seattle/Bainbridge, and Edmonds/Kinston routes.



Q23. How many of those per month round trips, for each route, were for the primary purpose of commuting, how many were primarily recreational/social purposes, and how many were for other purposes?

Purpose of Last Ferry Ride



A majority (73%) said that the purpose of their summer period ferry ride was recreational/tourism, up from 60% in 2018. Commuting to work (7%) is down 5-points from 2018.

Purpose of Last Ferry Ride n=4,847		FROG Panel	
		2018 n=4,691	Shift
Recreational/tourism	73%	60%	+13%
Medical appointment	7%	6%	+1%
Commute to/from work	7%	12%	-5%
Work related activity/business	3%	5%	+2%
Travel to/from to see family/friends	3%	6%	-3%
Personal business/activity	2%	4%	-2%
Travel to/from special event	2%	2%	0%
Shopping excursion	1%	1%	0%
Everyday shopping	0%	1%	-1%
Commute to/from school	0%	0%	0%
Other	1%	3%	-2%

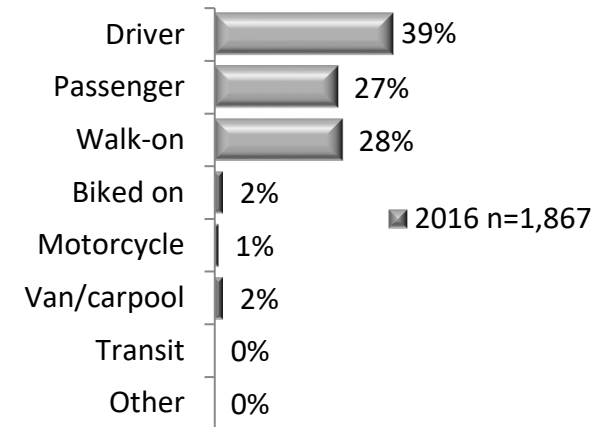
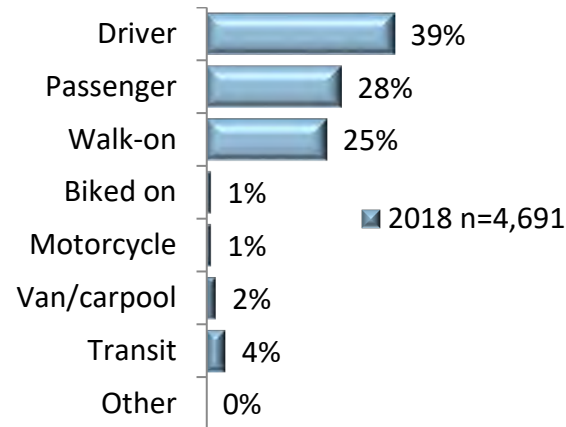
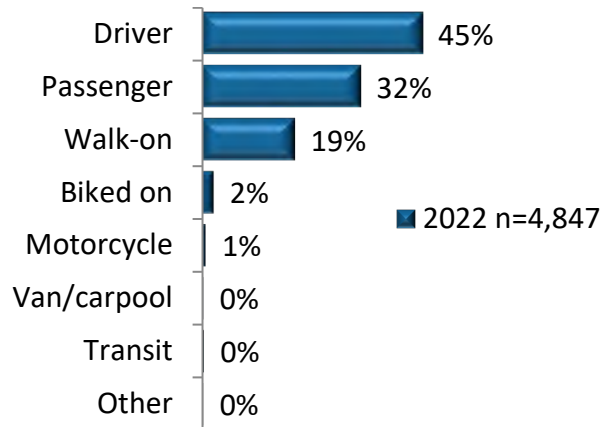


Q33. Thinking about your LAST FERRY RIDE ONLY on the [INSERT] route, which of the following was the primary purpose of that specific trip? (merged with Q3b)

Boarding Method of Last Ferry Ride



Summer 2022 shows an uptick in the percentage of summer riders driving on in a vehicle (either driver or passenger) while slightly fewer reported they walked on. Walk-on is highest on the Seattle/Bremerton (41%) and Seattle/Bainbridge (36%) routes.



Boarding Method of Last Ferry Ride 2022	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents	4847	719	252	130	643	333	128	34*	259	876	1428	45*
Driver	45%	33%	34%	55%	47%	56%	61%	67%	41%	55%	40%	99%
Passenger	32%	27%	18%	33%	34%	32%	29%	5%	39%	38%	40%	1%
Walk-on	19%	36%	41%	7%	15%	9%	6%	26%	16%	4%	16%	-
Biked on	2%	3%	5%	3%	1%	2%	1%		3%	1%	3%	-
Motorcycle	1%	1%	0%	1%	1%	1%	2%	2%	2%	0%	0%	-
Van/carpool	0%	0%	-	-	0%	-	-	-	-	1%	-	-
Transit	0%	-	-	-	1%	-	-	-	-	1%	0%	-
Other	0%	-	1%	-	0%	0%	-	-	-	-	1%	-

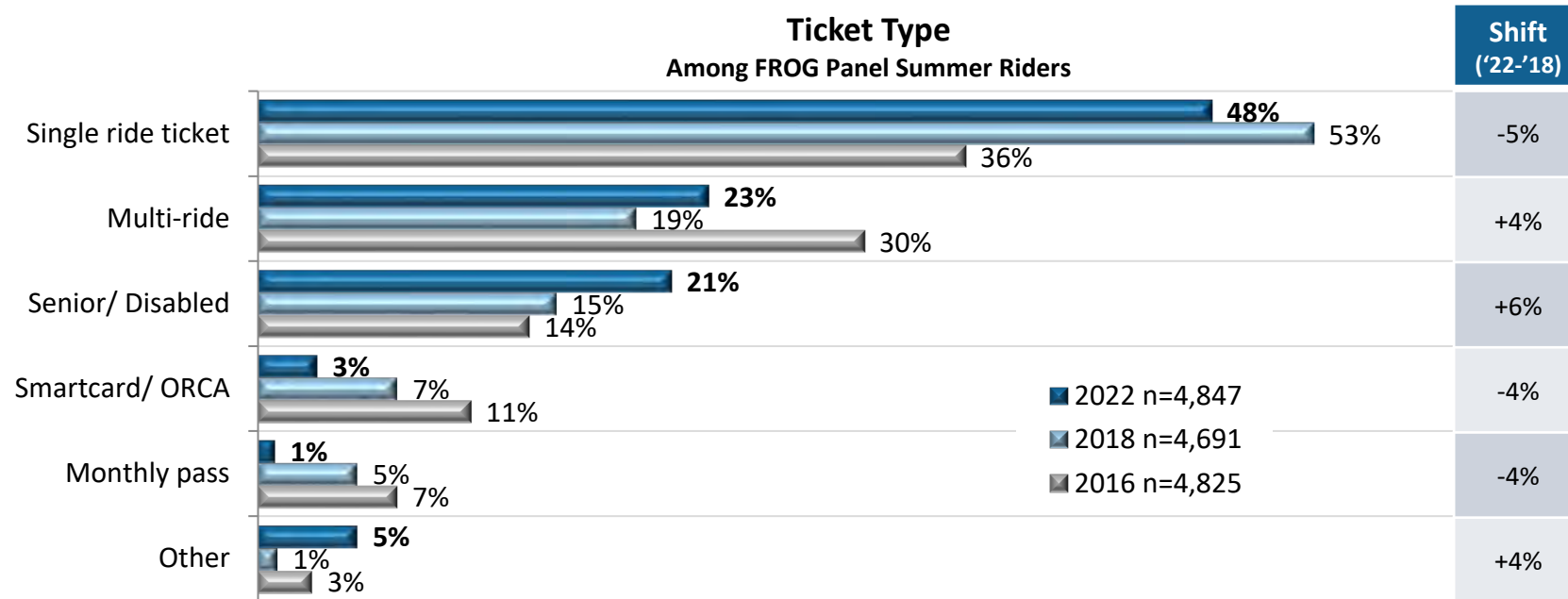
*Interpret with caution, small sample size.

Q34. In which of the following ways have you boarded the ferry? (combined with Q5)

Ticket Type



Summer riders are twice as likely to use single ride tickets than multi-ride tickets when traveling. This year saw a slight uptick in multi-ticket usage (+4%), but usage at 23% is still well below the higher numbers experienced in 2014 (39%) and 2016 (30%). Single ride tickets, while still most popular, dropped 5-points from 2018, while Senior/Disabled ticket usage increased by 6-points.



Ticket Used on Last Ferry Ride 2022	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents	4847	719	252	130	643	333	128	34*	259	876	1428	45*
Single ride ticket	48%	58%	61%	31%	56%	32%	43%	47%	55%	39%	39%	52%
Multi-ride	23%	15%	10%	47%	11%	45%	25%	36%	1%	29%	34%	47%
Senior/ Disabled	21%	16%	15%	17%	26%	11%	28%	6%	41%	26%	19%	1%
Smartcard/ ORCA	3%	5%	7%	2%	2%	5%	1%	-	2%	2%	0%	-
Monthly pass	1%	1%	2%	-	1%	0%	0%	11%	-	1%	0%	-
Other	5%	6%	5%	3%	4%	7%	2%	-	-	4%	8%	-

*Interpret with caution, small sample size.

Q37. On what kind of ticket were you travelling? (merged with Q8)



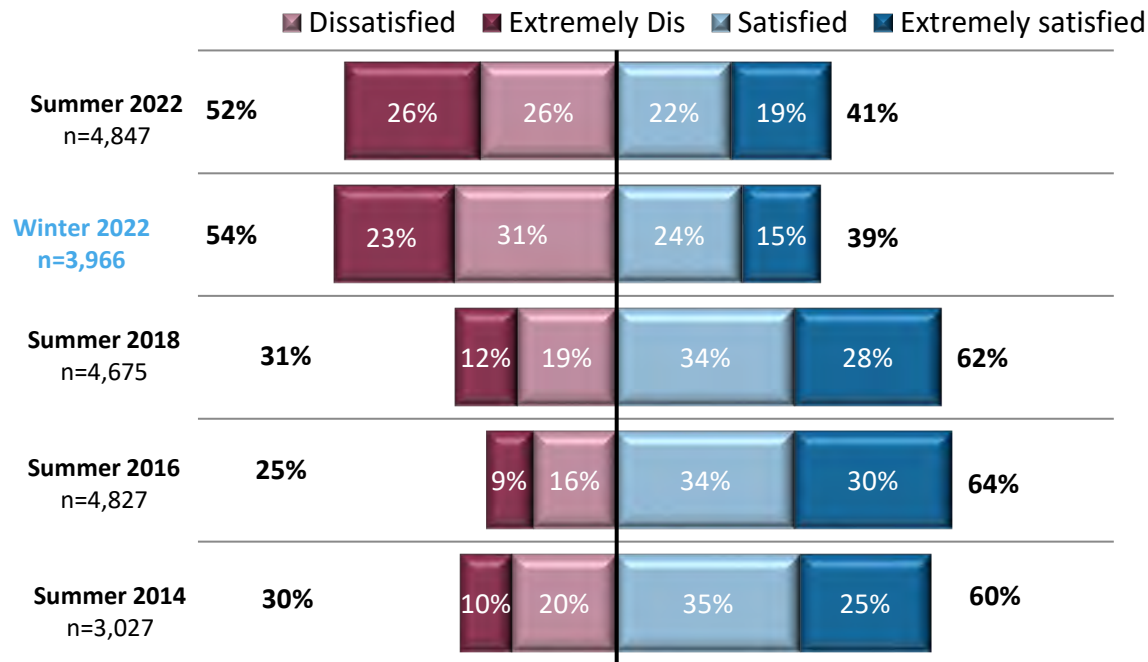
FROG Panel: Summer Rider Satisfaction

Overall Satisfaction



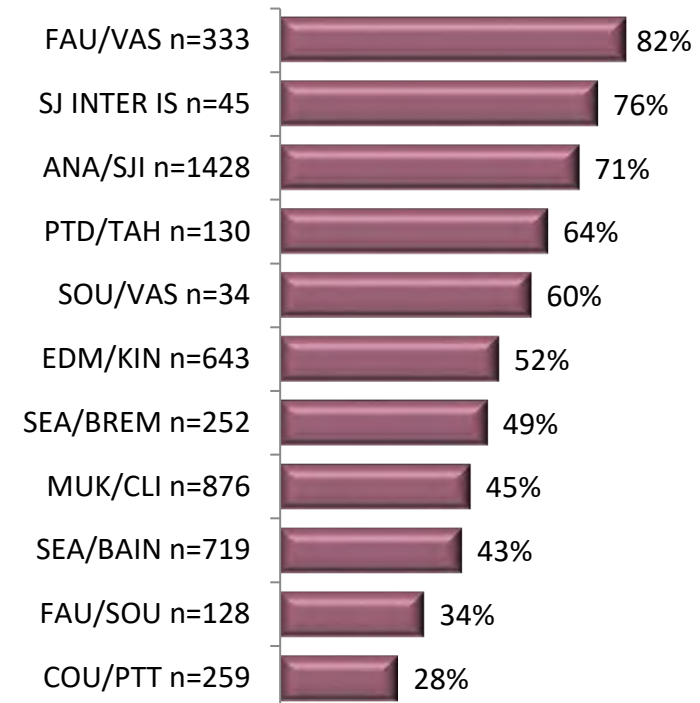
The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has declined significantly overall compared to 2018 and earlier years – from around three in five satisfied to just two in five satisfied. Dissatisfaction is highest on the Fautleroy/Vashon (82%), San Juan Interisland (76%), Anacortes/San Juan Islands (71%), and Point Defiance/Tahlequah (64%) routes.

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

Overall Dissatisfaction by Route (Onboard – Total Dissatisfied – 2022)



Four routes (Mukilteo/Clinton, Coupeville/Port Townsend, Seattle/Bainbridge, and Edmonds/Kingston) saw a reduction in riders who were "Dissatisfied" compared to Winter 2022.

FROG Panel	
Winter '22 n=4,691	Shift
57%	+25%
46%	+30%
54%	+17%
40%	+24%
38%	+22%
55%	-3%
49%	0%
74%	-29%
47%	-4%
29%	+5%
37%	-9%

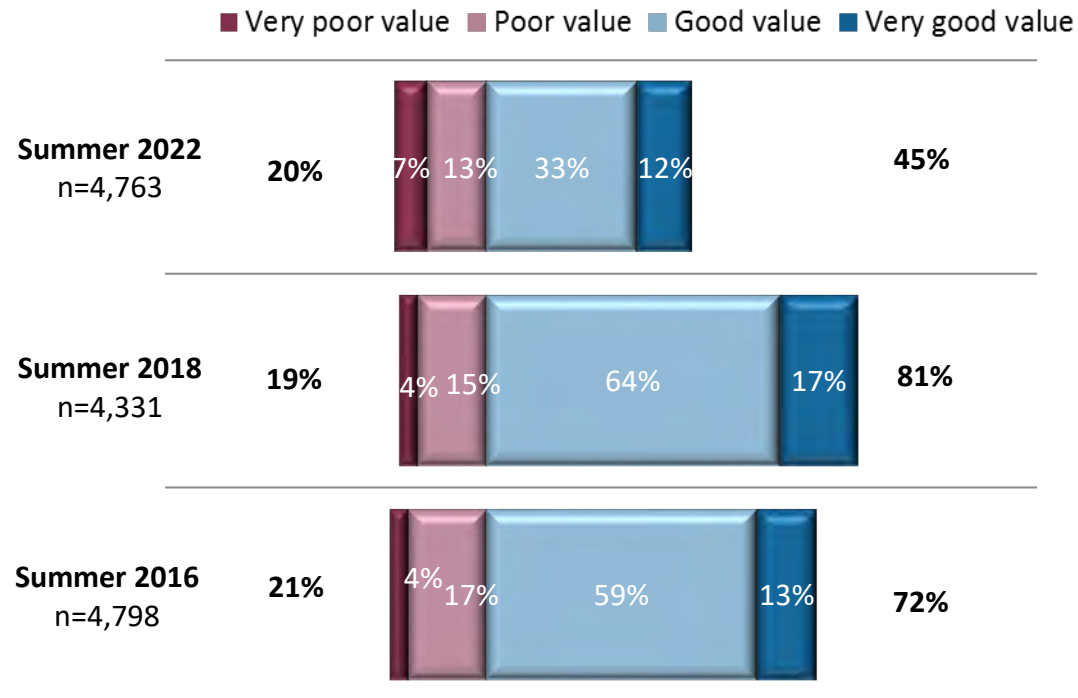
Q20. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer period. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period?

Overall Value



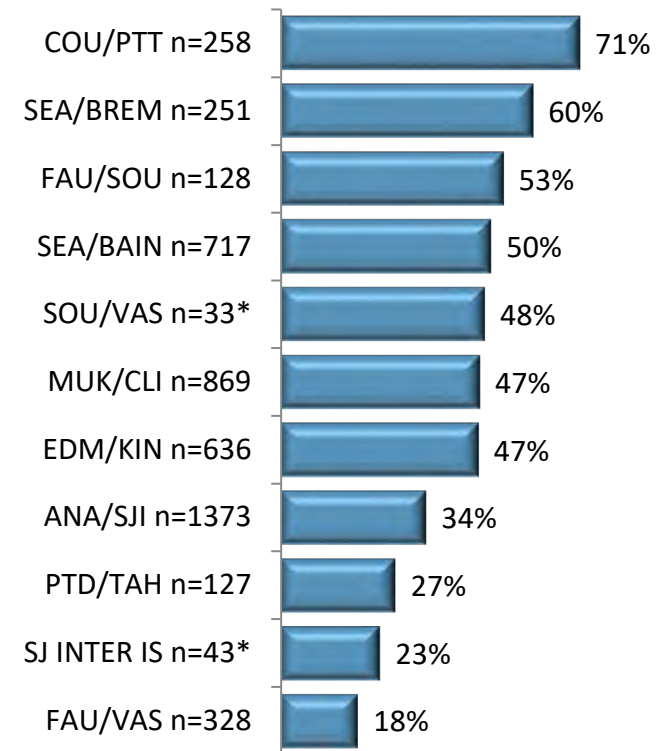
The percentage of riders saying WSF is a “good” or “very good” value in the 2022 summer period decreased significantly compared to 2018 (45% vs. 81%, respectively). Again, these ratings are undoubtedly influenced by the impacts on WSF from the pandemic. The routes garnering the highest percentage of summer riders who consider them to be a good value include Coupeville/Port Townsend (71%) and Seattle/Bremerton (60%).

Overall Perceived Value of WSF



Only ratings of good or poor are shown, don't know responses are not shown. The **bold** percentages represents the corresponding total good/poor value

Overall 'Good Value' by Route (Onboard – Very good + Good value – 2022)



FROG Panel	
Winter '22 n=4,691	Shift
74%	-3%
59%	+1%
61%	-8%
57%	-7%
48%	0%
43%	+4%
52%	-5%
41%	-7%
48%	-21%
48%	-25%
33%	-15%

*Interpret with caution, small sample size.

Q26. For the Summer period, do you feel that Washington State Ferries is...?

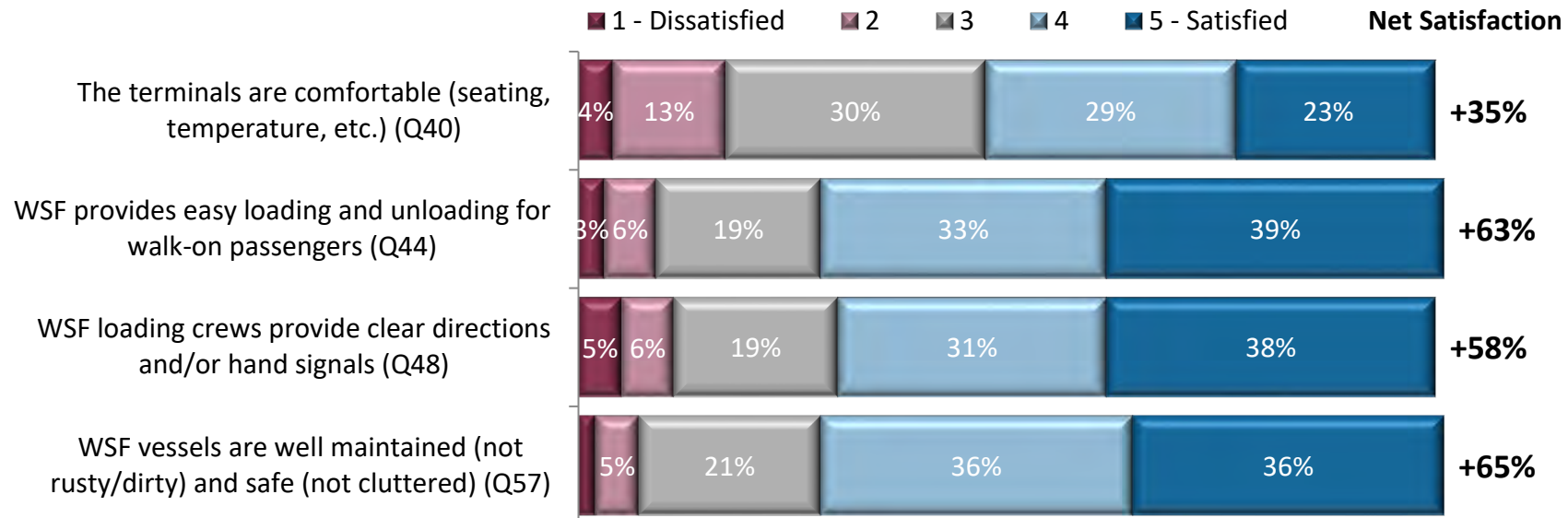
Satisfaction by Attribute - Tracking



Satisfaction across all four attributes remains positive. While there is a 10-point improvement with terminal comfort, nearly one out of five are still dissatisfied. There is also a small improvement over 2018 for “easy loading/unloading,” while the portion dissatisfied with “clear directions,” and “well maintained vessels” is similar to percentages from 2018.

- ❖ The following table shows the total dissatisfaction (1-2) of each individual attribute, relative to the 2018 dissatisfaction.
 - The **Shift** is 2022 dissatisfaction minus 2018 dissatisfaction.

Attributes	Summer Total Dissatisfaction		
	2022	2018	Shift
Terminals are comfortable	17%	28%	-11%
WSF provides easy loading and unloading for walk-ons	9%	13%	-4%
WSF loading crews provide clear directions and/or hand signals	11%	12%	-1%
WSF Vessels are well maintained and safe	7%	9%	-2%

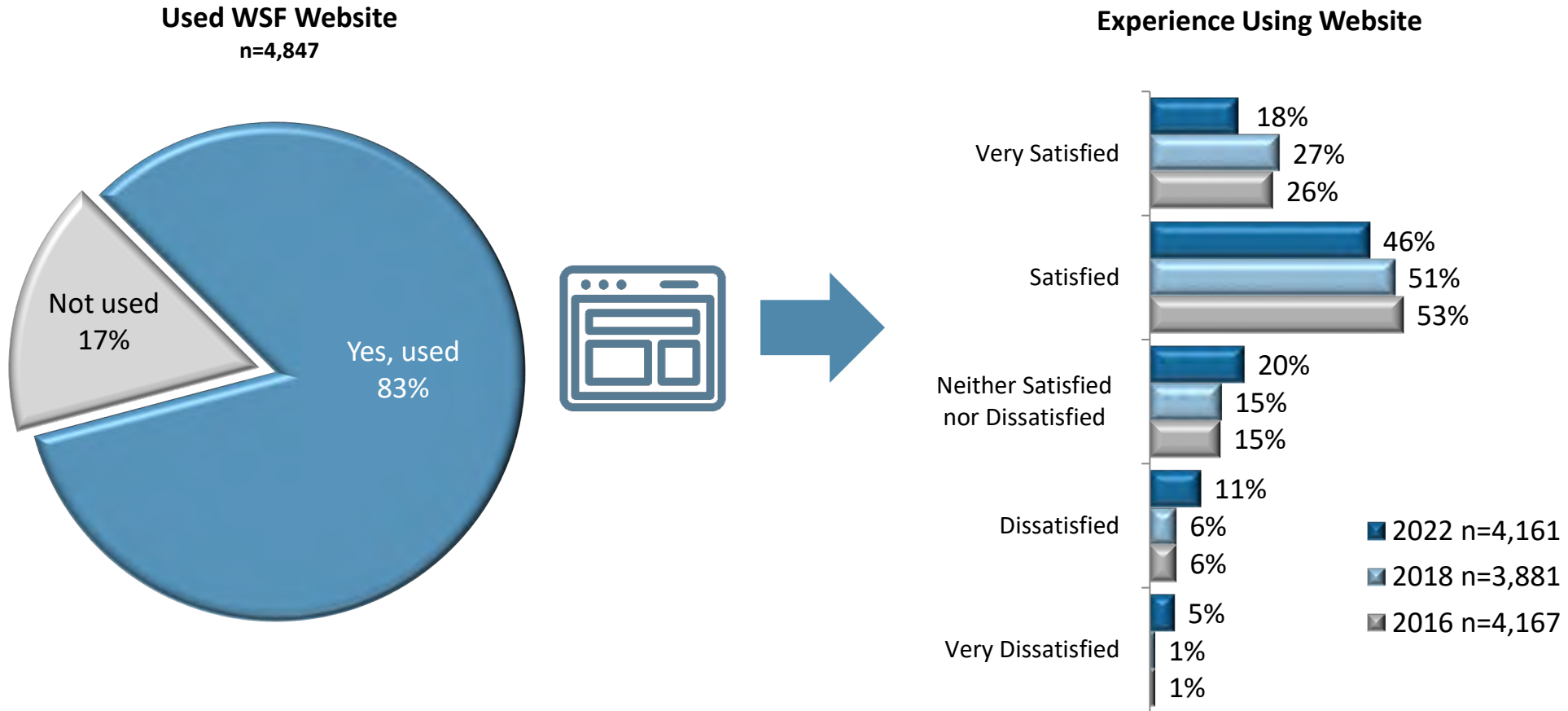


Using WSF Website



More than four in five summer riders (83%) have used the WSF website (up from 78% in 2018).

About two thirds (64%) are satisfied with their experience (down from 78% in 2018), and one in six (16%) are dissatisfied (up from 7% in 2018).



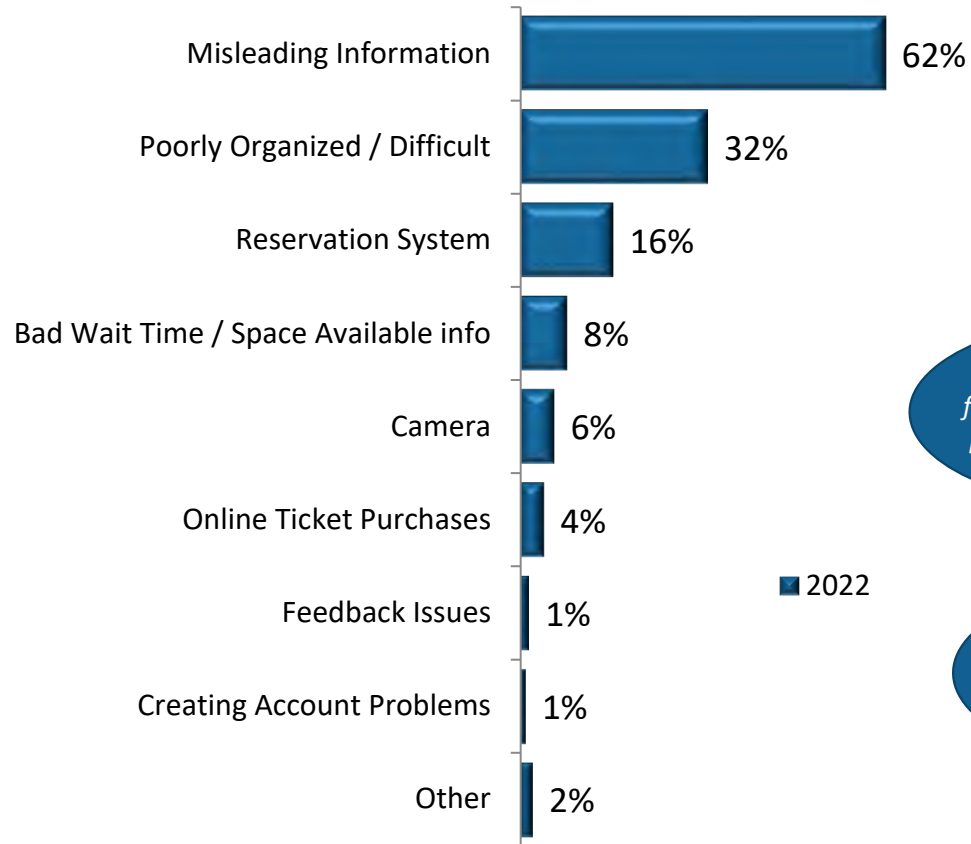
Q65. have you for any reason used the WSF website?

Q66. How satisfied were you with your experience using the WSF website?

Website Issues Mentioned



The most recent results show a shift in user experience in terms of areas of website dissatisfaction. Two in five dissatisfied users complain about misleading information. Comments show that getting accurate, up-to-date information is problematic. One in three feel the website is poorly organized or difficult to use (although this is down from around half in 2018). A slow and cumbersome reservation system is also an issue.



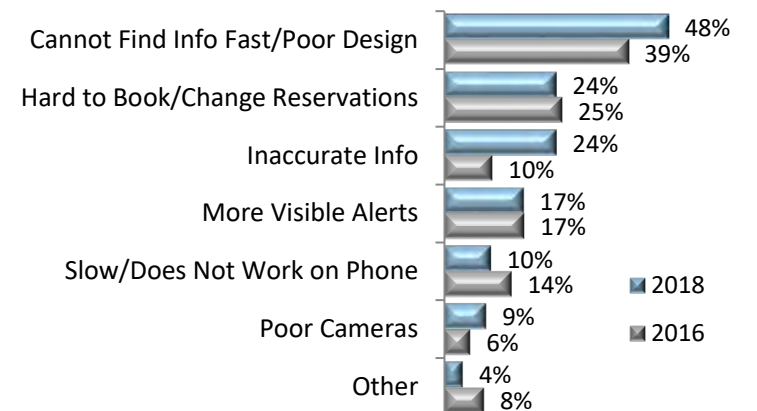
For Edmonds Kingston, finding up to date information on the number of ferries and ferry delays is VERY difficult...

The website was giving false information as to cancelled ferry runs on Seattle/Bainbridge route ... It stated runs were cancelled and they were not.

The information is not current enough, especially during unexpected delays...

Tried to make a reservation for a San Juan sailing and the process was very clunky and difficult to use.

The number of clicks it takes to arrange a reservation is horrible.... Make it better and more efficient.

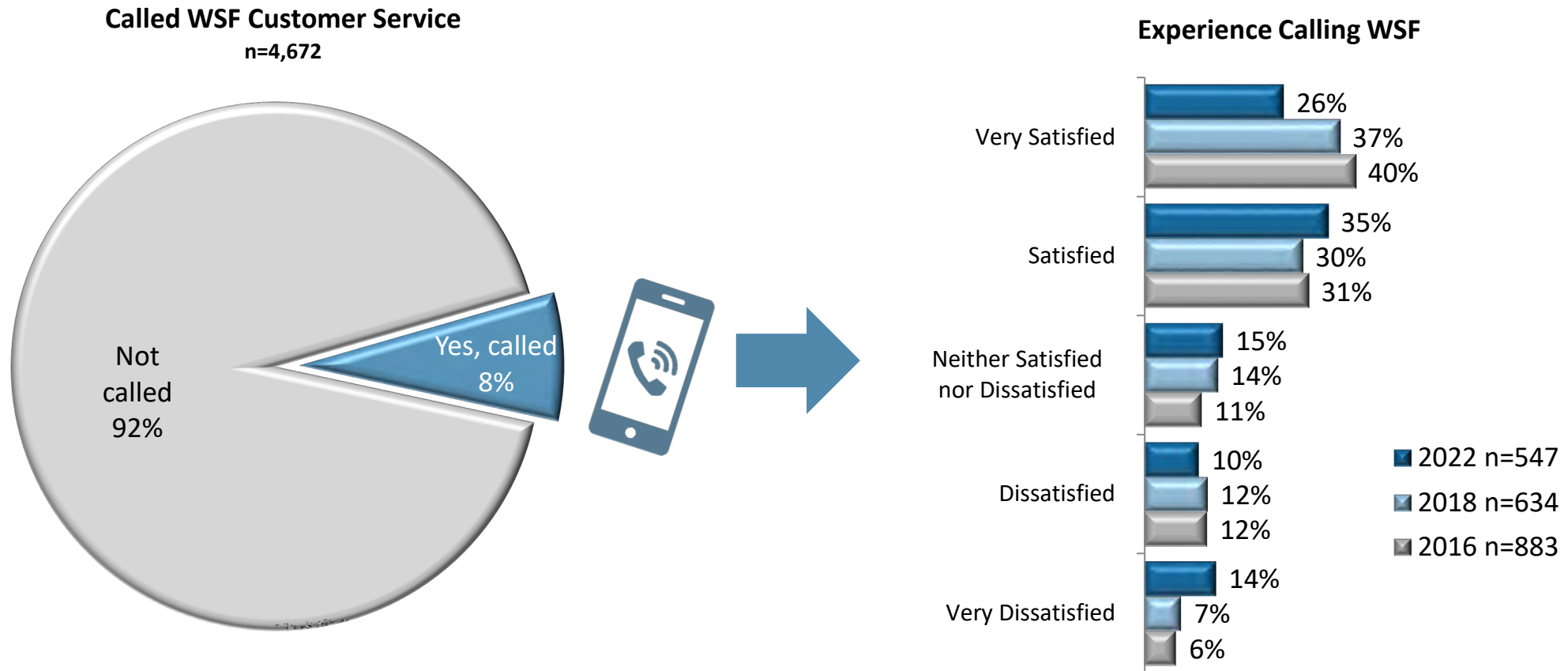


Q67. What specifically about your experience with the WSF website made you dissatisfied? Please be as specific as possible. (n=735)

Calling WSF Customer Service by Phone



One in thirteen riders (8%) have contacted WSF customer service by phone (comparable to 9% in 2018). Of those respondents who have called, the majority (61%) are satisfied with their experience (although this is down from 67% in 2018). However, one in four (24%) are dissatisfied with their call (up from 19% in 2018).



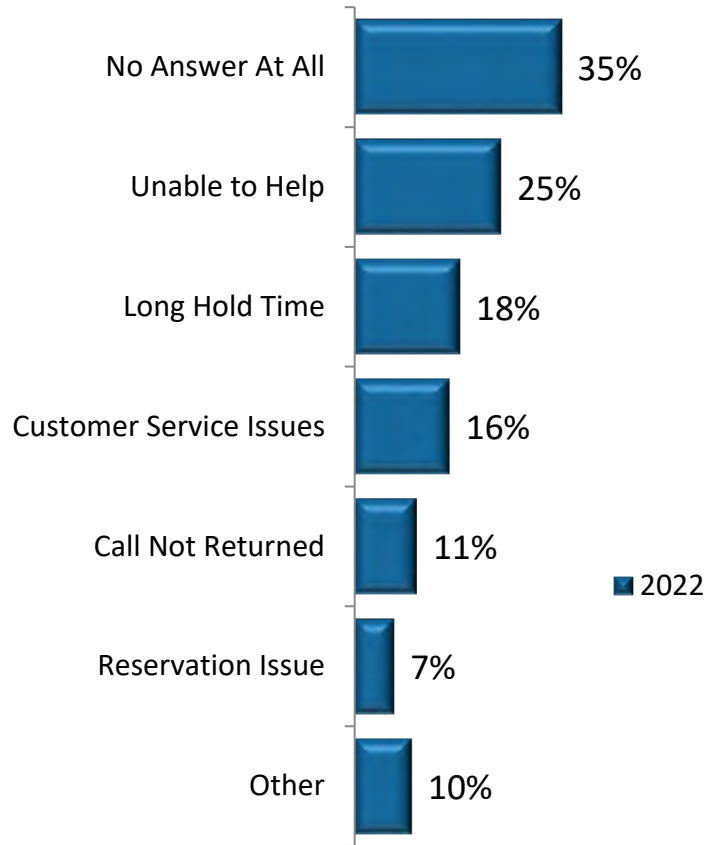
Q65B. During the Summer period, have you for any reason called WSF by phone?

Q68. How satisfied were you with your experience calling the WSF by phone?

Phone Issues Mentioned



No answer at all (35%), unresolved issues (25%), long hold times (18%), and customer service issues (16%) topped the list of complaints among people who are dissatisfied when calling WSF by phone.



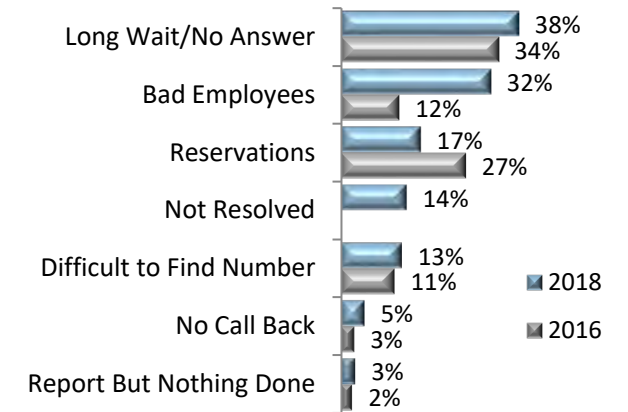
Was disconnected multiple times. Finally got through only to be told I would not be put through.

Long wait times and they cannot help with the horrible performance of on-time crew, shortages, etc. Sub-par.

Multiple times I would call to get help with a reservation, as the website wasn't working, and I never got through.

The phone system puts you in a loop so you can't talk to anyone.

Many times it was impossible to get through to make a reservation.



Q69. What specifically about your experience calling WSF by phone made you dissatisfied? (Multiple Response, n=141)



Additional Rider Comments

Additional Issues Mentioned



The top additional issues mentioned by riders concerned their frustration with scheduling problems/unreliability, issues at the terminal(s), customer service/employee/staffing issues, issues making reservations, and negative reactions to the suggested fuel surcharge or fare increases.

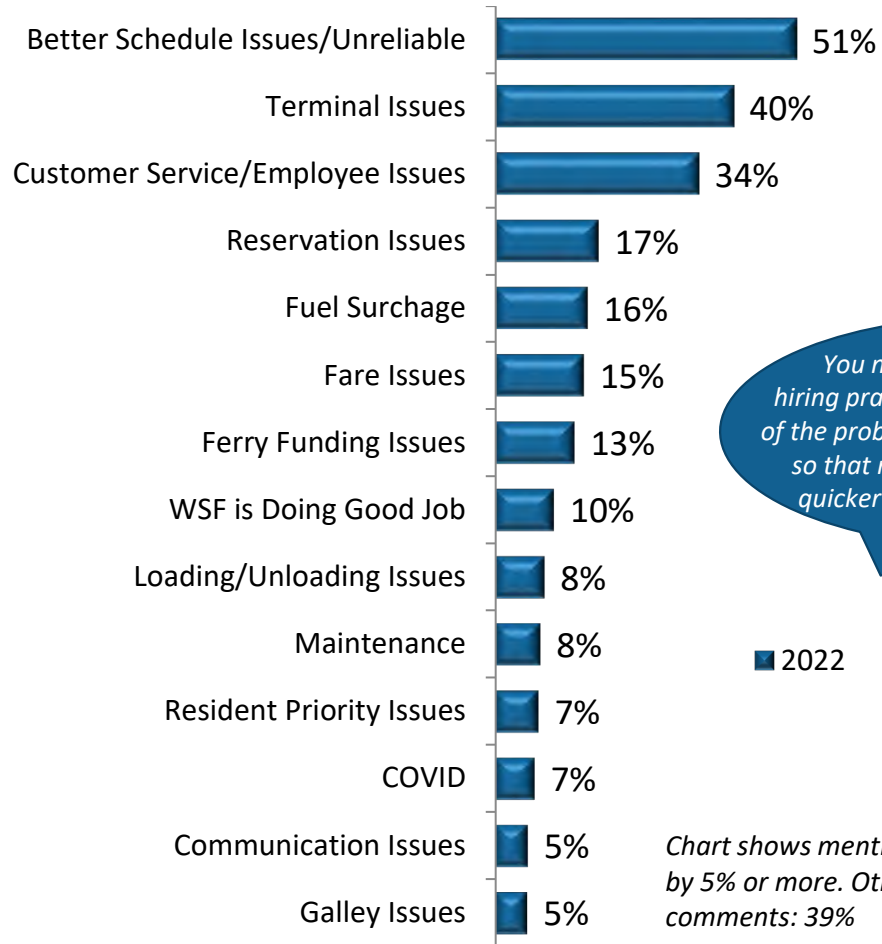


Chart shows mentions by 5% or more. Other comments: 39%

You need to start providing reliable service... Get your act together, start doing something about the lousy attitudes and start moving people.

You need to come up different hiring practices that match the urgency of the problems caused by the pandemic, so that more people are brought on quicker to stop ferry cancellations.

You should get your service together before thinking of any fare increase.

You guys are still falling short of the mark. Three hour waits are absolutely ridiculous.

You have a captive retail audience waiting for a ferry. Modernize your terminal at Anacortes. Have a better selection of food services during peak travel months...

You should ask how many times I wanted to take a specific ferry but was forced to drive around or take a different route... due to broken boats or staffing shortages. That number for summer would be six.

Q80. Do you have any additional thoughts regarding the ferry system you would like to share? (Multiple Response, n=2,301)



Questions?

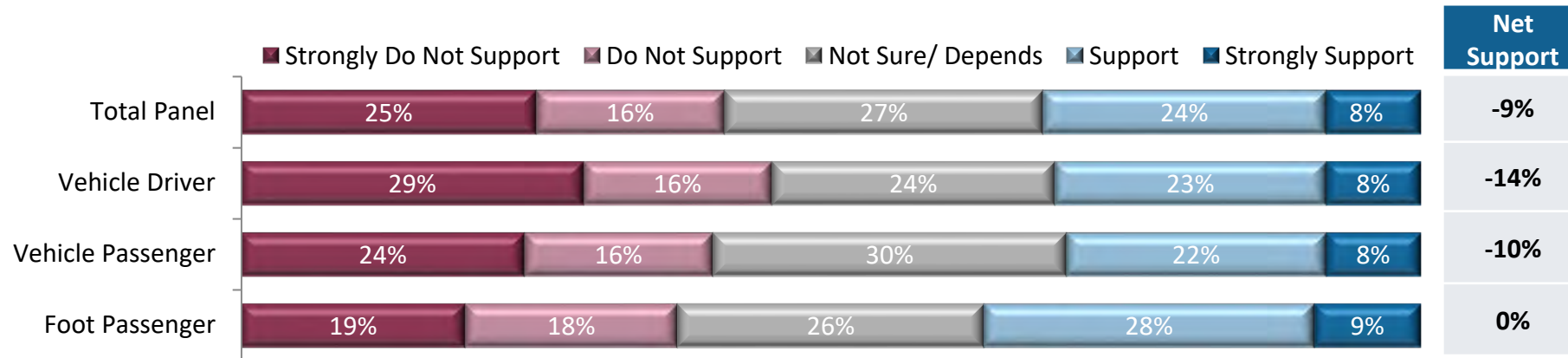


Fuel Surcharge – FROG Panel Results

Support of a Fuel Surcharge



More riders object (41% net) to the idea of a fuel surcharge than support one (32% net), with one in four strongly against the idea. This is the case in total, and for vehicle drivers or passengers. Walk-on riders are more evenly mixed in their support of such a measure.



Riders on the Coupeville/Port Townsend route stand apart for showing the most support of a fuel surcharge, while riders on the Southworth/Vashon, Point Defiance/Tahlequah, Fautleroy/Vashon, and the San Juan Inter-Islands routes show the strongest opposition.

Support of a Fuel Surcharge	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents	4847	719	252	130	643	333	128	34*	259	876	1428	45*
Support (NET – Strongly Support + Support)	32%	32%	32%	20%	37%	20%	37%	34%	53%	29%	31%	30%
Strongly support a fuel surcharge, to cover funding shortfalls [5]	8%	8%	9%	6%	9%	3%	7%	9%	15%	7%	10%	10%
Support adding a fuel surcharge, to cover funding shortfalls [4]	24%	24%	24%	14%	28%	17%	30%	25%	38%	21%	21%	19%
Not sure/depends [3]	27%	30%	27%	18%	26%	26%	27%	10%	27%	26%	27%	23%
Do NOT support adding a fuel surcharge [2]	16%	18%	15%	21%	15%	17%	17%	7%	9%	17%	18%	3%
Strongly do NOT support adding a fuel surcharge [1]	25%	20%	26%	41%	22%	37%	19%	49%	11%	28%	25%	44%

*Interpret with caution, small sample size.

Q71. In general, do you support the idea of a temporary fuel surcharge being added to current fares in the event WSF fuel funding fall short in the future?

Addressing Insufficient Funding for Ferry Fuel



While a third of riders think unfunded fuel costs should be funded in part by riders (through a surcharge) and in part by tax payers, two in five would like to see the tax-payers statewide pay for all un-funded fuel costs. Only one in ten think WSF riders should pay (on their own). This portion is slightly higher (one in seven) among walk-on passengers.

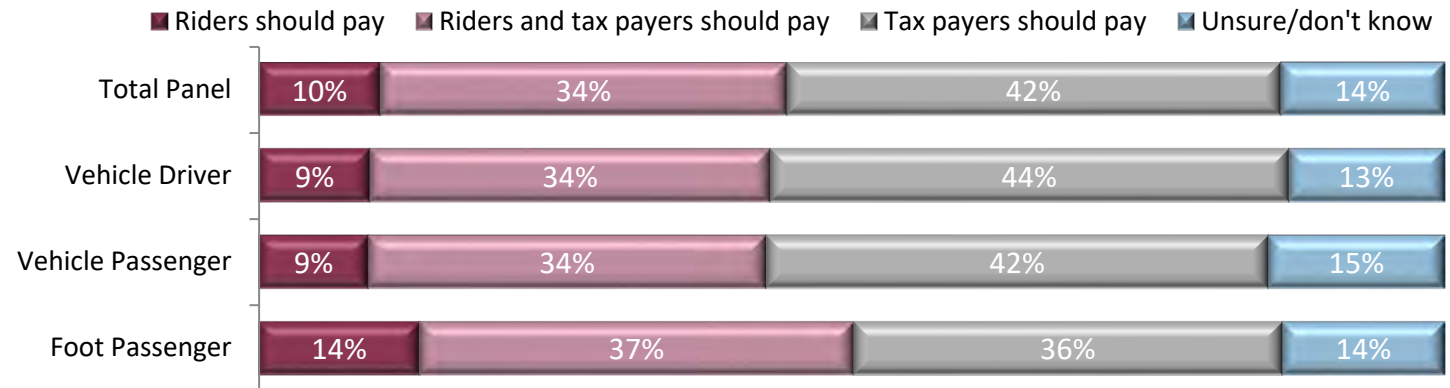
Given these options:

WSF riders should pay for any un-funded ferry fuel costs through a ferry fuel surcharge applied to fares.

Unfunded fuel costs should be funded in part by the riders (via fuel surcharge applied to fares), and in part by tax-payers statewide via transportation tax revenues

Tax-payers statewide should pay for un-funded ferry fuel costs via current transportation taxes.

Unsure/don't know



Riders on the Coupeville/Port Townsend, Edmond/Kingston, Seattle/Bainbridge, and Fauntleroy/Southworth routes show a bit more support for WSF riders paying at least part of the unfunded fuel costs, while those on the Point Defiance/Tahlequah, Fauntleroy/Vashon, and Anacortes/San Juan Islands routes show the strongest support for tax-payers bearing the cost.

Addressing Insufficient Funding for Ferry Fuel	TOTAL	SEA/BAIN	SEA/BRE	PTD/TAH	EDM/KIN	FAU/VAS	FAU/SOU	SOU/VAS	COU/PTT	MUK/CLI	ANA/SJI	INTER SJI
Respondents	4847	719	252	130	643	333	128	34*	259	876	1428	45*
Net – WSF riders pay all or part of the unfunded fuel costs	44%	49%	43%	26%	50%	27%	49%	38%	62%	43%	39%	34%
WSF riders should pay for any un-funded ferry fuel costs...	10%	11%	8%	11%	14%	4%	11%	15%	17%	9%	6%	2%
Unfunded fuel costs should be funded in part by the riders... and in part by tax payers statewide...	34%	38%	35%	15%	36%	23%	38%	23%	45%	34%	33%	32%
Tax payers statewide should pay for un-funded ferry fuel costs...	42%	37%	39%	61%	33%	62%	37%	57%	21%	41%	51%	53%
Unsure/don't know	14%	13%	18%	13%	16%	10%	14%	5%	17%	15%	10%	12%

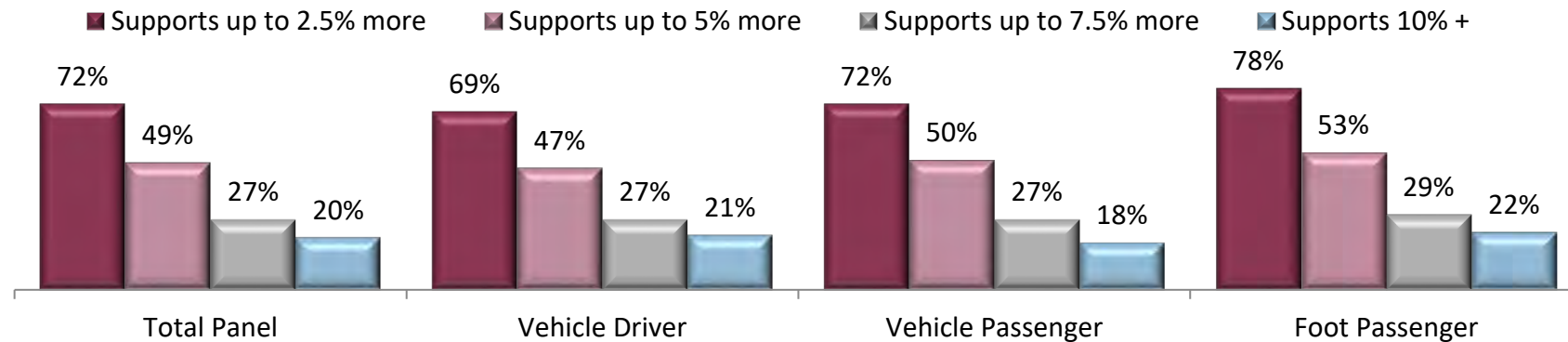
*Interpret with caution, small sample size.

Q72. In general, which of the following best describes your position on how to address insufficient funding for ferry fuel?

Amount of Ferry Fuel Surcharge Willing to Pay



When given more specifics and an example relative to their own recent ferry usage, seven in ten riders (72%) would be willing to pay up to 2.5% more to cover fuel funding shortfalls, and half (49%) would be willing to pay up to 5% more.



Riders on the Coupeville/Port Townsend route exhibit more willingness to pay a surcharge. Riders on the Point Defiance/Tahlequah, Fauntleroy/Vashon, and San Juan Inter-Islands routes again show the greatest opposition.

Amount of Surcharge Willing to Pay	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents	4847	719	252	130	643	333	128	34*	259	876	1428	45*
I would be willing to pay up to 2.5% more	72%	78%	71%	50%	76%	56%	76%	65%	84%	70%	68%	49%
I would be willing to pay up to 5% more	49%	53%	48%	24%	55%	33%	45%	47%	67%	49%	46%	35%
I would be willing to pay up to 7.5% more	27%	27%	25%	14%	33%	15%	31%	26%	50%	25%	28%	22%
I would be willing to pay up to 10% or more	20%	18%	15%	9%	25%	11%	23%	24%	35%	21%	22%	20%

*Interpret with caution, small sample size.

Q73. If riders were asked to cover fuel funding shortfalls to help support current service levels, how much would you be willing to pay in a ferry fuel surcharge, on top of the fare you most recently paid to ride the ferry?



- ▶ Winter Performance Survey – FROG Panel Survey March-April 2023 (results June 2023)
- ▶ Freight Survey – Email/Expanded Engagement Spring 2023
- ▶ Quick Poll #1 – Topic TBD Summer 2023
- ▶ Quick Poll #2 – Topic TBD Fall 2023



THANK YOU!

For More Information Contact:

Reema Griffith, WSTC Executive Director

Bill Young, Survey Program Advisor

Chelsea Benning, Survey Program Project Manager

360-705-7070