

SAVE A SPOT

October 14, 2015



Anacortes - San Juan Islands

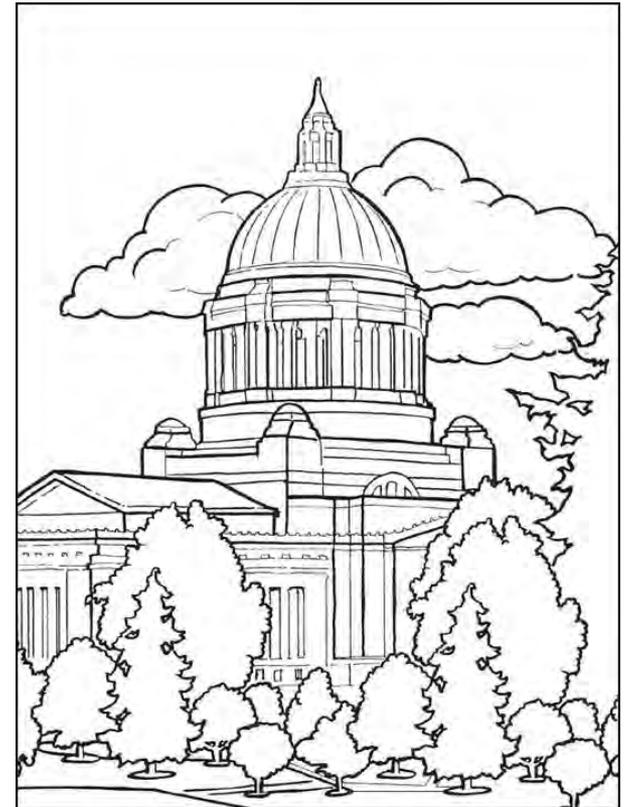


Washington State Ferries

Why implement a reservations system?

Legislative Directive:

- Plan for efficient growth
- Make better use of limited resources
- Shift vehicle traffic to underutilized sailings
- \Rightarrow Vehicle Reservations

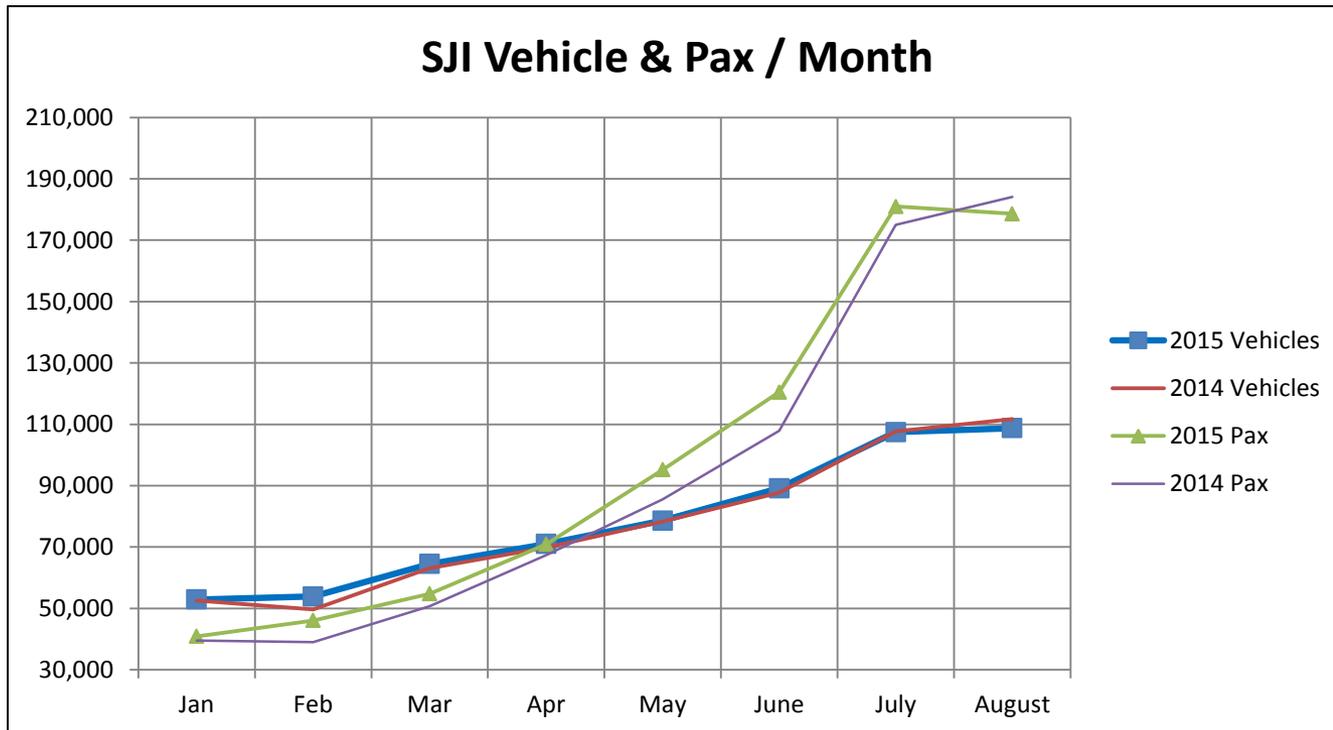


San Juan Islands Reservation Program Analysis

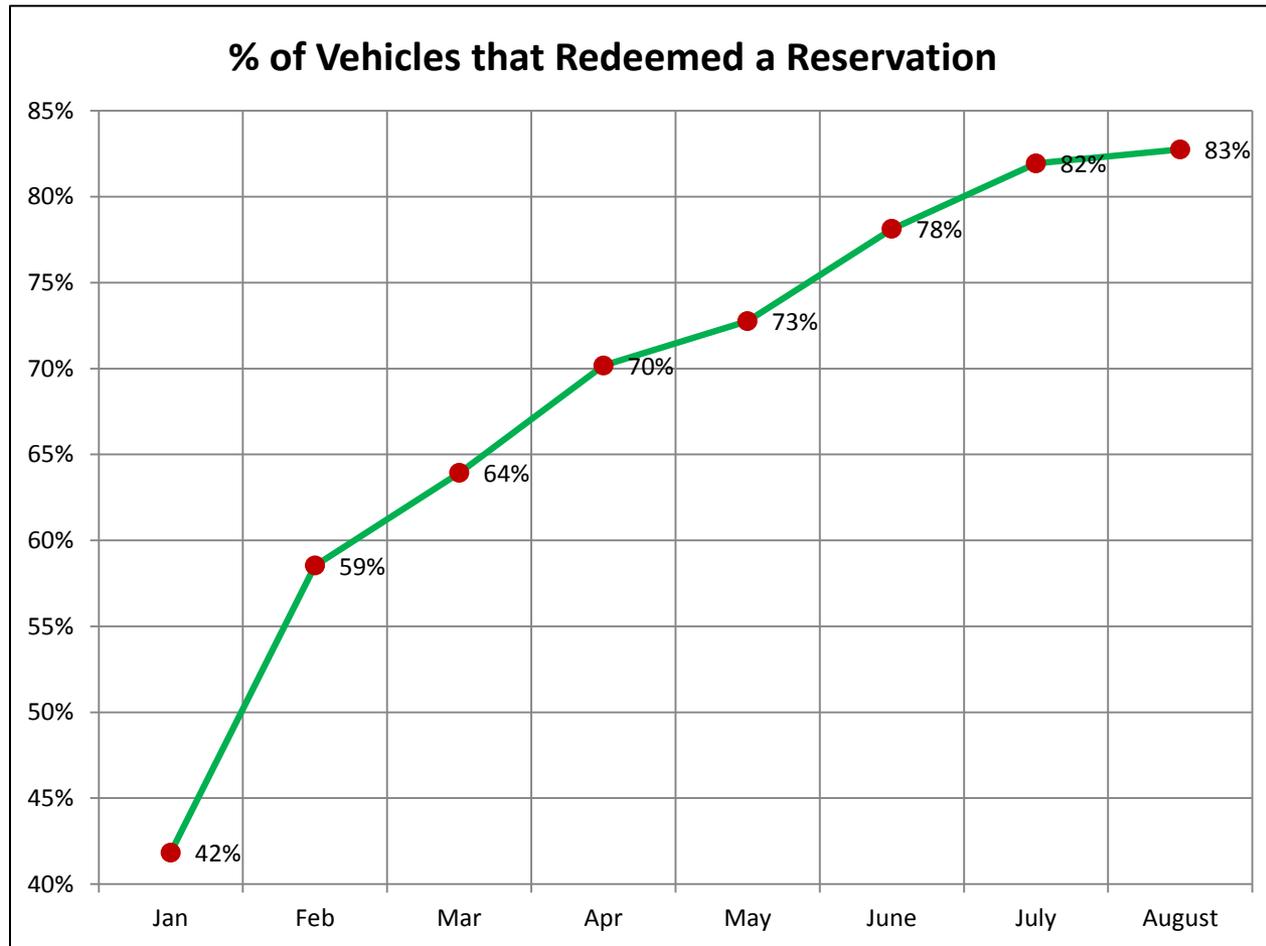
- 1) Review ridership and reservation data
- 2) Gather and review feedback
 - Customer emails – compliments/complaints
 - Staff surveys
 - Customer surveys
 - Public meetings
- 3) Identify program modifications based on feedback
- 4) Customer education on changes
- 5) Implement changes (as needed) – spring/summer 2016

SJI Ridership 2014 - 2015

- 2015 SJI Ridership (over 2014):
 - +3.2% Overall ridership
 - +5.2% Passengers
 - +0.9% Vehicles



SJI Reservation Utilization



SJI Save a Spot Benefits

Customer

Provided predictability: Reservation customers know when they will travel. (2,667 per day travel with reservation)

Reduced time waiting at the terminal: Customers may arrive at the terminal 30+ minutes prior to sailing.

Last minute reservations available: 25% of reservations are made the day before or on the same day of travel.

Ferries

Reduced queueing at terminal: lines approaching tollbooth at Anacortes are typically less than 15 minutes.

Reduced congestion: overloads reduced by 80%.

Maintained ridership: maintain 2014 ridership with vessel capacity reduction in spring/summer.



SJI Save a Spot Challenges

- **Release of Reservation Space**

- Tiered release of space is confusing and difficult to explain
- 95% increase in calls; phone users claim to call 1.7 times on average to make round-trip reservation
- 7am space release creates surges of online/phone users that is difficult to manage
- Phone users are disadvantaged due to 2nd & 3rd tiers being taken within 5 minutes by online users
- 22% survey respondents state they weren't able to make a round-trip reservation

- **Website Usability**

- 9% of customers find the website difficult to use, increasing calls
- Some customers are not completing the reservation process due to confusion



SJI Save a Spot Challenges

- **Flexible Policies & Low Fees**
 - 15% of all reservations made are cancelled, with 74% of cancellations occurring within a week of the sailing date.
 - People making multiple reservations take space from those that need predictability
 - 10% sailing no-show rate impacts our ability to communicate available space for drive-up vehicles
 - 7% of reservations don't travel at all; some are "insurance" reservations
- **Customers Arriving Early**
 - 2% of customers attempt to travel on an earlier sailing than the one they reserved
 - Increases time at the tollbooth to explain policies
 - Customers unhappy about forfeiting guaranteed space on reserved sailing
- **Vessels Departing With Available Space**
 - Riders don't want to take risk of traveling standby and possibly waiting 3-4 hours

Partnership & Hospitality Meetings

San Juan County Lodging Tax 2015 vs. 2014

	May	June	July
Ferry Ridership	+6%	+7%	+2%
SJ County Tax	+12%	+15%	+21%
Lopez Island Tax	+65%	+49%	+71%
Orcas Island Tax	+13%	+9%	+26%
San Juan Island Tax	+1%	+17%	+6%

Hospitality Feedback

- Reduced stress on customers
- Need more space earlier
- More standby space needed
- More work to explain release process
- More cancellations due to tiered release
- Less last-minute reservations – 1 week prior aligned with weather
- Impacts to local business who benefited from ferry wait times

SJI Partnership Feedback

- Reservations has been a success
- Riders are getting accustomed
- Only make minor program tweaks if necessary
- Improve website usability
- Residents prefer predictability of reservations over standby



Reservation Survey

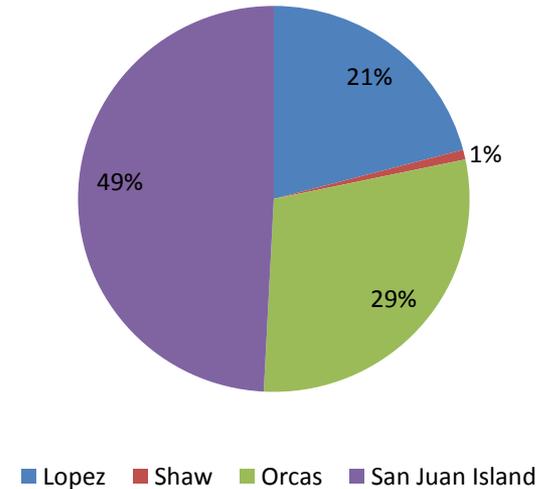
- 19,462 Reservation holders took online survey
- 9% of customers make reservation via phone with 94% of respondents saying the service was good to excellent
- 83% of survey respondents found the website easy to use with 9% finding the website difficult
- 91% found the terminal check-in process good or excellent

What do you like and what can we improve?	
Like	Improvements
<ul style="list-style-type: none">• Guaranteed spot• Can plan ahead• Wait less at terminal	<ul style="list-style-type: none">• Reduce arrival window• Nothing; love it!• More standby space



San Juan County Survey

- 2.5% response rate of 9,791 postcards
- 91% are full-time residents
- Majority travel 1 to 4 times per month
- 32% plan travel 3 to 7 days out with only 4% planning the same day
- 56% are satisfied with the reservation program

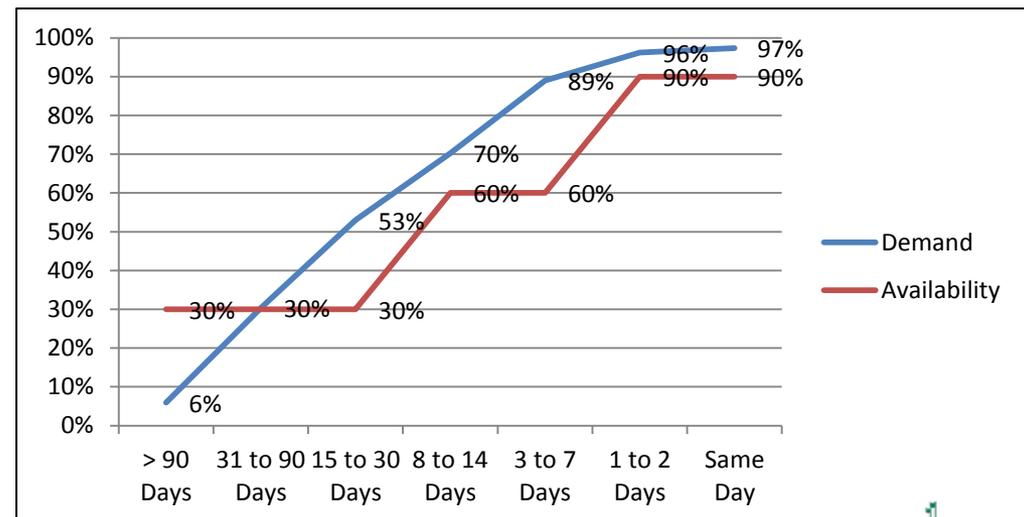
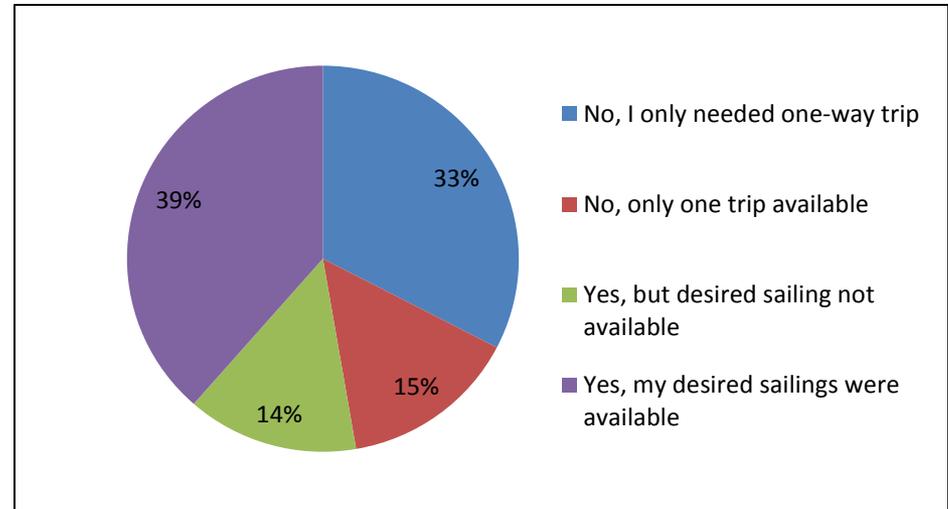


What do you like and what can we improve?	
Like	Improvements
<ul style="list-style-type: none"> • Guaranteed spot • Wait less at terminal • Can plan ahead 	<ul style="list-style-type: none"> • More standby space • Modify release of space • Speed up tollbooth lines

Reservation Survey – Round-Trip Reservations

Were reservation holders able to make a round-trip reservation?

46% say they needed to call or go to the website more than once to get their reservation on the desired sailing.



SJI No-Shows

- On average, 90% of reservations travel on their reserved sailing. Varies by day of week and sailing.
- 20% of the vessel is available for drive-up vehicles due to no-shows.
- 7% of reservations made don't travel and are charged a no-show fee.
- Need to incentivize last-minute cancellations.

Route	% Sailing Show Ratio	% Day Show Ratio
Anacortes / San Juan Islands	90%	93%
Anacortes		
Day of Week	% Sailing Show Ratio	% Day Show Ratio
Monday	92%	95%
Tuesday	91%	95%
Wednesday	87%	91%
Thursday	90%	94%
Friday	86%	90%
Saturday	90%	93%
Sunday	91%	94%
Terminal Average	90%	93%
Friday Harbor		
Day of Week	% Sailing Show Ratio	% Day Show Ratio
Monday	91%	94%
Tuesday	91%	95%
Wednesday	89%	92%
Thursday	91%	95%
Friday	90%	94%
Saturday	88%	93%
Sunday	87%	92%
Terminal Average	89%	93%
Orcas Island		
Day of Week	% Sailing Show Ratio	% Day Show Ratio
Monday	90%	94%
Tuesday	91%	95%
Wednesday	89%	93%
Thursday	92%	97%
Friday	91%	96%
Saturday	91%	95%
Sunday	88%	93%
Terminal Average	90%	95%

SJI Ability to Reserve

July Average Reservation - % of Sailing Full

- 90% of all sailings are available for reservations.
- 23% of reservations are made within twenty-four hours of sailing.
- Many sailings aren't fully reserved, providing predictability when needed.

Sailing Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
4:15:00 AM	20%	22%	20%	25%	23%	12%	2%
6:00:00 AM	23%	22%	26%	31%	37%	14%	3%
6:15:00 AM	11%	18%	14%	26%	28%	8%	2%
6:25:00 AM	40%	37%	37%	51%	63%	45%	10%
7:25:00 AM	49%	41%	54%	68%	83%	70%	23%
9:10:00 AM	81%	87%	84%	90%	90%	88%	62%
9:35:00 AM	39%	35%	46%	57%	84%	64%	33%
10:20:00 AM	84%	68%	85%	90%	89%	87%	78%
11:55:00 AM	85%	76%	82%	88%	89%	89%	77%
12:35:00 PM	88%	90%	89%	90%	91%	82%	89%
2:00:00 PM	86%	80%	84%	88%	88%	70%	79%
3:45:00 PM	91%	87%	90%	91%	90%	74%	87%
4:45:00 PM	85%	86%	89%	90%	88%	64%	83%
5:10:00 PM	55%	62%	79%	85%	84%	33%	40%
6:45:00 PM	14%		91%	46%	53%	14%	16%
7:20:00 PM	72%	69%	84%	91%	90%	57%	70%
8:20:00 PM	54%	59%	75%	86%	83%	60%	76%
8:45:00 PM			61%	88%	60%		
9:00:00 PM	25%	27%	48%	76%	79%	25%	33%
11:00:00 PM					71%		
Daily Average	57%	55%	63%	70%	72%	53%	51%



SJI Ability to Travel Standby

July Average Ridership - % of Sailing Full

- Sailings <100% have space for drive-up vehicles.
- Sailings >100% typically have overloads.
- Most sailings available for drive-up for those vehicles that need more flexibility.

	Dest	Avg Cap	Mon	Tue	Wed	Thu	Fri	Sat	Sun
4:15	F	139	26%	20%	22%	27%	26%	13%	4%
6:00	S, O	141	52%	43%	50%	61%	59%	25%	12%
6:15	L	120	1%	1%	2%	2%	6%	1%	1%
6:25	F	124	51%	43%	45%	55%	69%	49%	11%
7:25	S, O	140	51%	45%	58%	67%	68%	65%	20%
8:25	Si	120	65%	47%	54%	55%	73%	67%	63%
9:10	F	141	90%	93%	94%	87%	94%	100%	69%
9:35	L	124	45%	42%	51%	62%	93%	60%	37%
10:20	S, O	139	95%	78%	91%	96%	112%	93%	85%
11:55	F	124	102%	95%	97%	106%	114%	100%	89%
12:35	L, O	141	106%	99%	103%	105%	98%	94%	96%
2:00	F	139	90%	84%	91%	95%	104%	81%	88%
2:50	Si	120	78%	40%	51%	63%	80%	48%	86%
3:45	S, O, F	141	97%	95%	96%	99%	98%	82%	94%
4:45	F	124	92%	87%	99%	98%	90%	71%	87%
5:10	L	139	67%	72%	82%	101%	92%	41%	55%
6:45	L	141	14%			36%	41%	15%	16%
7:20	S, O	139	63%	70%	70%	95%	98%	56%	74%
8:20	F	124	49%	61%	78%	94%	94%	58%	79%
9:00	L, S, O	141	27%	40%	51%	66%	77%	29%	38%
11:00	L, O, F	81					108%		
Daily Average			63%	61%	68%	75%	80%	58%	56%



Modifications: No-Show Fees

Reasons for reviewing policy:

- 7% of reservation holders don't travel
- Takes space away from those that need predictability
- Vessels departing with space available
- Impacts ability to communicate available spaces
- Some people making "insurance" reservations

Possible modifications:

- a) Maintain current no-show fees (standard veh = \$10)
- b) Increase no-show fee by 50% (standard veh = \$15)
- c) Charge full-fare (standard veh = \$22.40 – \$31.90)

Modifications: Cancellation Policy

Reasons for reviewing policy:

- 15% of reservations are cancelled
- Takes space away from those that need to plan
- Vessels departing with available space
- Impacts ability to communicate available spaces
- No incentive for people to cancel last-minute

Possible modifications:

- a) Maintain current policy: prior day by 5pm
- b) 2 days prior by midnight with incentive to cancel afterwards

	Wednesday	Thursday	Friday *reserved sailing
Option A		Cancel Sailing by 5pm for no fee (\$0)	Cancellation is charged no-show fee (\$10)
Option B	Cancel by midnight (\$0)	Allow cancellation for lesser fee (\$5)	Allow cancellation up to 2 hours prior for lesser fee (\$5)

Modifications: Reservation Release

Reasons for reviewing policy:

- Too complex
- Unable to meet early demand
- Inability to make round-trip reservations
- 7am releases cause stress on WSF and customers
- 95% increase in calls to customer service

Option A: Maintain Three-Tiered Release

Release	Timing	Percentage
1	2 months prior to season for all sailings	30%
2	14 days prior to sailing	30%
3	2 days prior to sailing	30%
Standby	At time of staging	10%

Modifications: Reservation Release

Option B: Two-Tiered Release (percentages are just examples)

Release	Timing	Percentage	Benefits
1	2 months prior to season for all sailings	60%	<ul style="list-style-type: none"> Increased round-trip reservations Better ability to meet early demand Reduced impact on customer service
2	2-7 days prior to sailing (need to finalize timing)	20%	<ul style="list-style-type: none"> Aligns with when a majority of islanders plan their travel Provides last-minute travel for hospitality industry
Standby	At time of staging	20%	<ul style="list-style-type: none"> Provides more flexibility for travel uncertainty Reduces “insurance” and multiple reservations

Option C: One Release

Release	Timing	Percentage	Benefits
1	2 months prior to season for all sailings	80%	<ul style="list-style-type: none"> Ability to make round-trip reservations Able to meet early demand Reduced impact on customer service
Standby	At time of staging	20%	<ul style="list-style-type: none"> Provides more flexibility for travel uncertainty Reduces “insurance” and multiple reservations

SJI Save A Spot

Questions & Answers