



market decisions  
CORPORATION

# Summer Report Findings

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*Part of the Washington State Transportation  
Commission 2010 Ferry Research Initiative*



Washington State  
Transportation Commission

Conducted by  
Market Decisions Corporation  
June-August 2010



# Table of Contents

❖	Preface	3
❖	Methodology	4
❖	Executive Summary	6
❖	General Ridership	9
▪	Key Findings	10
❖	Recreational and Social Travel	27
▪	Key Findings	28
❖	Tariff and Surcharge	46
▪	Key Findings	47
❖	Reservation System	69
▪	Key Findings	70
❖	Ferry Services & Amenities	78
▪	Key Findings	79
❖	Rider Characteristics & Demographic Information	99
❖	Appendix A: Questionnaire	111
❖	Appendix B: Weighting	124



# Preface

- ❖ In 2010, the Washington State Transportation Commission (WSTC) changed the process of how research is conducted regarding Washington State Ferries (WSF). In the past, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG). FROG is an online community where ferry travelers will have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions).
- ❖ The research initiative in 2010 consists of the following main phases:
  - Spring Customer Survey
  - Mode Shift and Elasticity of Demand Research
  - Freight Survey
  - General Market Assessment Survey
  - Summer Customer Survey
  - Capital Funding
  - Fare Strategies
- ❖ The focus of this report is the Summer Customer Survey.
  - A comprehensive report of all phases will be available January 2011.
  - Breakouts of all survey data by Legislative District will be available.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC ☎ (360) 705-7070.



# Methodology

- ❖ The following report presents the findings for the Summer 2010 surveys with comparisons to winter 2010 and the 2008 study. The main objective of this research is to understand from the ferry riders' perspective of their travel behavior, opinions and attitudes regarding important issues currently facing the WSTC and WSF.
  - This overall objective resulted in the following areas of exploration:
    - Ferry travel activity - summer ferry travel from June 20 through September 25, 2010 (compared to winter ferry travel from January 3 through March 27).
    - Recreational usage - understand usage of ferries for recreational and social purposes.
    - Tariff issues - gauge support of various options to manage vehicle demand and reduce congestion.
    - Reservation System - determine support and importance of features for potential reservation system.
    - Ferry operating costs - measure support of changes in ferry fares for out-of-state passengers.
    - Service and amenity satisfaction - measure the satisfaction and importance of ferry services and amenities.
    - Ferry riders' characteristics - travel patterns, WSF satisfaction and demographic data.
- ❖ A total of eight thousand four hundred sixty-three (n=8,463) ferry riders completed the Summer and Winter 2010 survey yielding a maximum sample variable of +/- 1.1% at the 95% confidence level.
  - A total of four thousand three hundred fifteen (n=4,315) ferry riders completed the Summer survey between July 28, 2010 and August 18, 2010, yielding a maximum sample variable of +/- 1.5% at the 95% confidence level.
  - A total of four thousand one hundred seventy-three (n=4,173) ferry riders completed the Winter survey between April 6, 2010 and May 28, 2010, yielding a maximum sample variable of +/- 1.5% at the 95% confidence level.



## Methodology (cont.)

- ❖ The data were weighted by route and boarding method for the last trip taken in order to make the survey results proportionate to overall ferry ridership and to allow comparisons to the winter survey 2010 and the 2008 survey data.
  - For additional details please see Appendix B.
- ❖ Due to respondents who either did not answer certain questions or selected no response or don't know, the question bases vary throughout the report.
  - Small sample sizes, those n=30 or less, will be called out on each slide, if present.
- ❖ Significant differences between summer and winter riders are noted as follows:
  - Significant increases in the summer survey are noted in green and bolded.
  - Significant decreases in the summer survey are noted in red and bolded.
- ❖ Significant differences between routes (only noted in the new summer question series) are highlighted by a **blue outline**
- ❖ Unless stated otherwise, all findings are based to the number of riders, not to the number of rides (volume).
  - Comparisons made by rider volume are noted when significant differences at the 95% confidence level are present.
- ❖ Additionally some of the information was analyzed by legislative districts. Differences by legislative districts are noted in the select sections.
  - However, because the information to pinpoint respondents' exact District (i.e., street address) is not available to us, there is some overlap between the Districts which may result in anomalies such as the low level of support in District 21 due to its overlap with Districts 1, 32, 38, and 44.



# Executive Summary



# Executive Summary

- ❖ 73% of riders support a higher price for a single trip and 64% agree that summer single-fare tickets should be priced higher than winter single-fare tickets.
- ❖ 52% of riders support charging an additional 10% over current summer single-fare prices during July and August as a way to manage wait times, while 33% oppose.
  - 44% of riders support a price increase of 5% during the peak summer period and a price decrease of 5% in non-peak seasons.
- ❖ In total, 36% of riders are in support a fuel surcharge to recoup some of the higher than expected fuel costs; 51% are against.
  - 37% of respondents support a fuel surcharge that is capped at 20% of the fare price, regardless of how much it covers the extra fuel costs; 46% prefer applying the surcharge across all fares equally.
- ❖ One quarter of ferry riders support introducing higher fares for out-of-state ferry passengers.
  - Of those in support of higher fares for non-residents, riders propose an average surcharge of 21%.
  - Of those who originally supported higher fares for non-residents, 62% remain supportive after considering the extra time that may be needed to verify residency.
- ❖ Support for the implementation of a reservation system is highly divided, with 37% strongly opposed and 21% strongly in favor of the program.
- ❖ If the reservation system were in place, roughly half (48%) of respondents would use the program on occasion, if not more (22% every time, 8% frequently and 18% occasionally).
- ❖ The most important feature of the possible system is enhanced information/signage regarding current ferry status available before arriving to the terminal.
  - The least important features include reservations on non-commuter sailings available six months in advance and a maximum of 90% of space available for reservations during peak periods.



## Executive Summary (cont.)

- ❖ Three in four (75%) ferry riders feel that WSF is a good value during the summer season, with 14% rating it as a “very good value” and 61% rating it as a “good value.”
  - Visiting family and friends is by far the most frequently mentioned purpose of riders’ last recreational or social trip.
  - When asked why they chose WSF over other ways of commuting to their destination, the most commonly mentioned response among recreational riders was because it is the fastest/most direct way.
  - 29% of summer riders primarily ride to commute to and from work, down significantly from the winter wave (39%). In 2008, 25% of summer riders and 36% of winter riders were commuters.
    - As one would expect in the summer months, the number of respondents reporting the purpose of their last ferry ride as recreation/tourism or travel to/from family and friends have both increased significantly compared to the winter survey (18% vs. 6% and 20% vs. 14%, respectively).
- ❖ Seattle/Bainbridge, Edmonds/Kingston and Mukilteo/Clinton are the most travelled ferry routes during both the summer and winter months.
- ❖ The primary factors in summer that determine whether to take the ferry or drive around are faster travel time by ferry (47%) and long waiting lines waiting to catch the ferry (44%).
- ❖ Cleanliness of vessels and minimal arrival time prior to departure are the highest rated of the eight tested ferry services based on importance.
  - 23% of riders feel that the loading and unloading process could be done better or more efficiently, primarily on the Seattle/Bainbridge (39%) and Edmonds/Kingston (27%) routes.
    - The top suggestions for improving the efficiency of the loading and unloading process are “training employees/improve customer service” (24%) and “better dock and street level traffic control” (18%).
- ❖ Usage of all ferry services and amenities has decreased in the summer months.



# General Ridership



# Key Findings

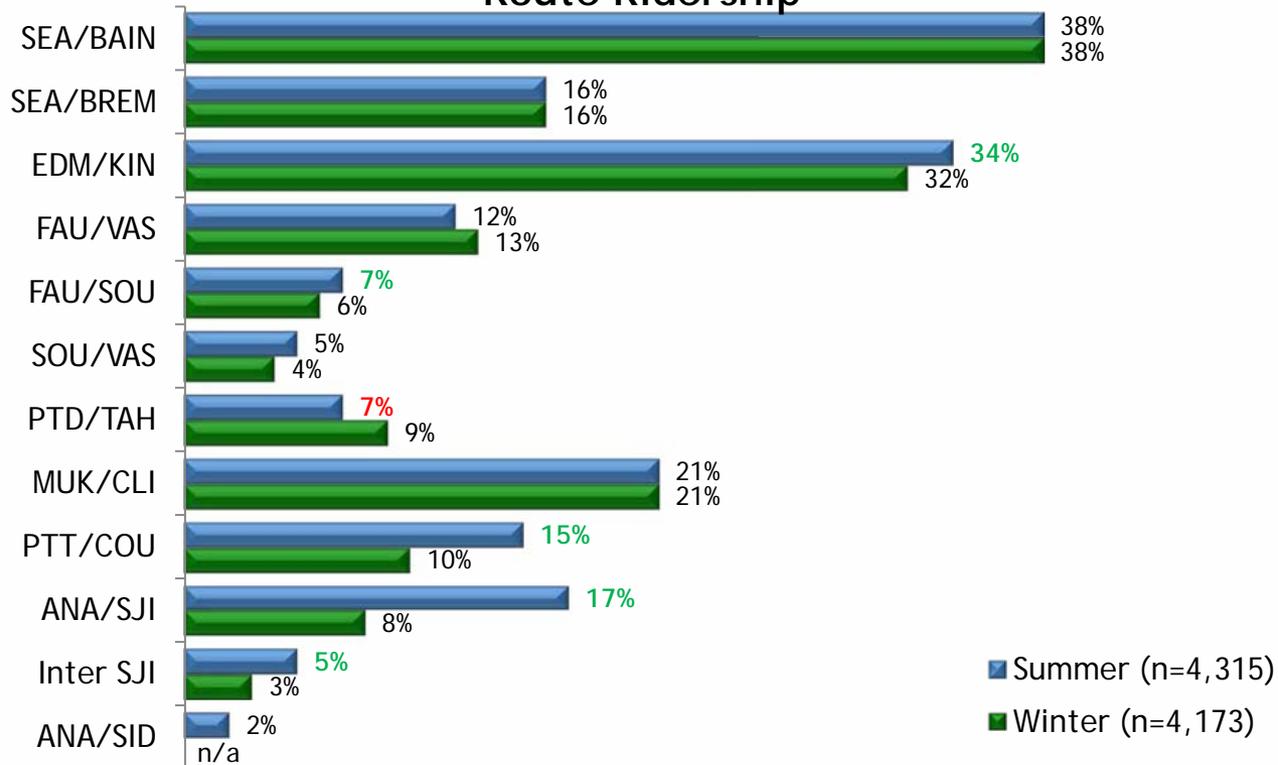
- ❖ Seattle/Bainbridge, Edmonds/Kingston and Mukilteo/Clinton are the most travelled ferry routes during both the summer and winter months.
  - Summer ridership is significantly higher than winter ridership on the Fauntleroy/Southworth, Port Townsend/Coupeville, Anacortes/San Juan Islands and Inter San Juan Islands routes.
  - Seattle/Bremerton (79%), Seattle/Bainbridge (72%) and Fauntleroy/Southworth (72%) have the highest percentage of commuting trips per month during the summer travel period.
    - All routes, with the exception of Southworth/Vashon, have a higher percentage of commuting trips in the winter months.
  - Anacortes/Sidney (71%) and Port Townsend/Coupeville (60%) have the highest percentage of recreational or social trips per summer month, while Seattle/Bremerton (22%) and Fauntleroy/Southworth (21%) have the lowest.
- ❖ The primary factors in summer that determine whether to take the ferry or drive around are faster travel time by ferry (47%) and long waiting lines waiting to catch the ferry (44%).
- ❖ Although a smaller proportion (29% this year, 25% in 2008) of summer riders primarily ride to commute to and from work than in the winter wave (39% this year, 36% in 2008), the number of commuters is similar because total ridership is higher in summer.
  - As one would expect in the summer months, the number of respondents reporting the purpose of their last ferry ride as recreation/tourism or travel to/from family and friends have both increased significantly compared to the winter survey (18% vs. 6% and 20% vs. 14%, respectively).
- ❖ 84% of ferry riders boarded the ferry in a personal car, either as a driver or as a passenger in a vehicle, while one-third walked-on.
  - The percentage of walk-on passengers has increased significantly in the summer period (33% vs. 27%).
- ❖ The most common ticket types for summer riders are single ride tickets (38%) and multi-ride frequent user tickets (35%).



# Overall Ridership

- ❖ Summer ridership is significantly higher than Winter on the Fauntleroy/Southworth, Port Townsend/Coupeville, Anacortes/San Juan Islands and Inter San Juan Islands routes.
- ❖ Due to the higher proportion of recreational riders vs. regular riders in the Summer, the average number of round trips per rider is lower on two-thirds of the routes.

## Route Ridership



Avg. # of round trips per month per rider	
Summer	Winter
11.6	11.2
11.5	13.1
6.5	7.6
12.2	13.5
10.1	13.4
5.4	5.6
6.5	6.5
12.6	13.4
2.5	3.0
3.6	4.2
4.9	4.0
1.4	n/a

S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the summer schedule period, June 20-September 25, 2010. For the routes shown below, how many round trips (two one-way trips = one round trip) per month do you take, on average, during the summer schedule period?

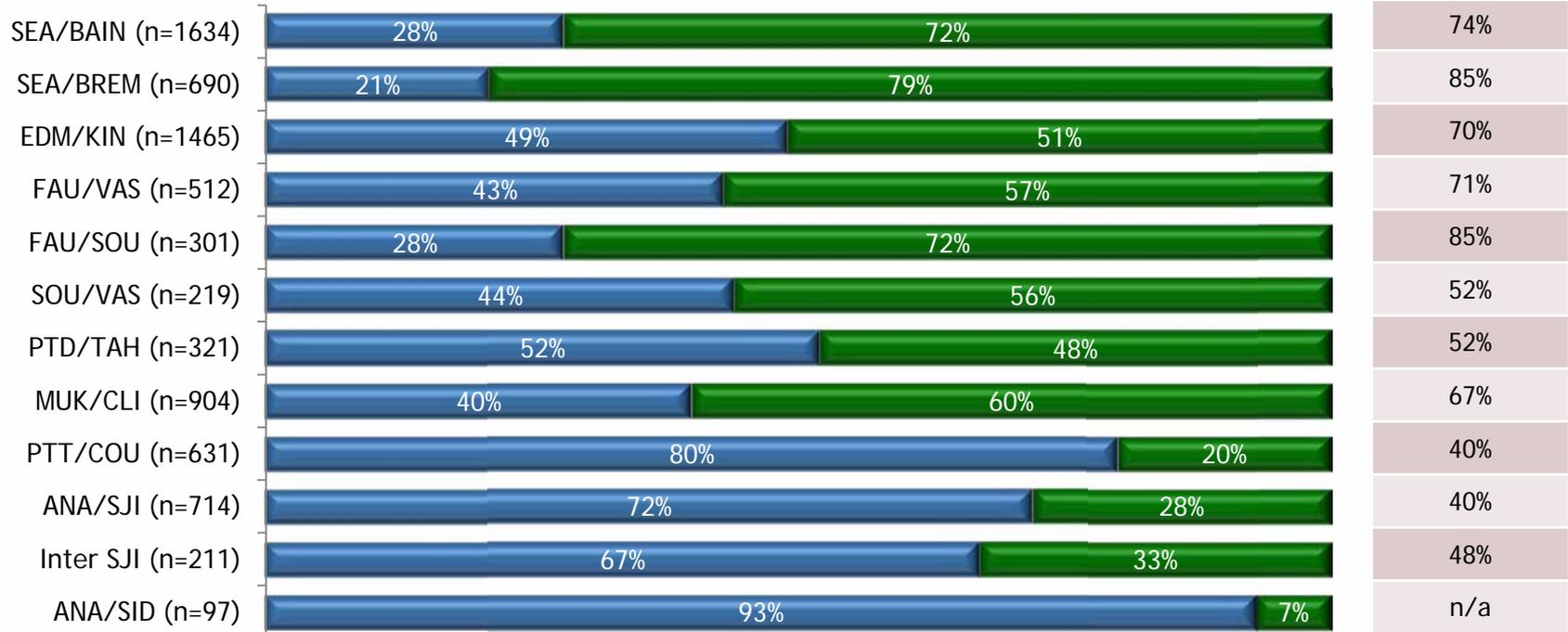


# Summer Period Ridership - Commuters

- ❖ Seattle/Bremerton (79%), Seattle/Bainbridge (72%) and Fauntleroy/Southworth (72%) have the highest percentage of commuting trips per month during the summer travel period.
- ❖ All routes, with the exception of Southworth/Vashon, have a higher percentage of commuting trips in the winter months, though the number of commuting trips is similar due to the higher traffic in the summer.

## Ratio of Commuters Per Month (of those who ride route)

■ Purposes other than commuting ■ Primarily for commuting



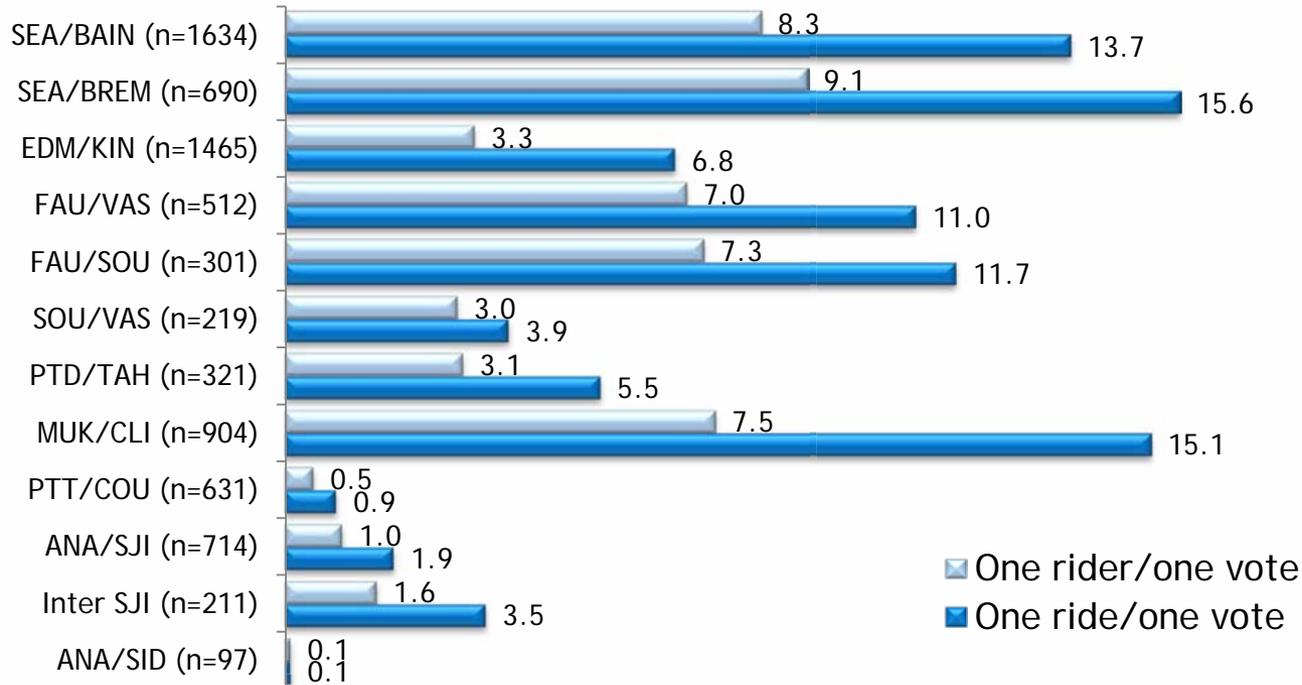
S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?



# Summer Period Ridership - Commuting Trips

- ❖ Seattle/Bremerton (9.1), Seattle/Bainbridge (8.3) and Mukilteo/Clinton (7.5) have the highest average number of commuting trips per month, during the summer travel period.
- ❖ Trips weighted by volume (one ride/one vote) clearly show which routes are commuter-intensive.

**Commuting Trips Per Month**  
(of those who ride route)



Avg. # of Commuting Trips per Rider, Winter Months
8.3
11.2
5.3
9.6
11.4
2.9
3.4
9.0
1.2
1.7
2.0
n/a

S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?

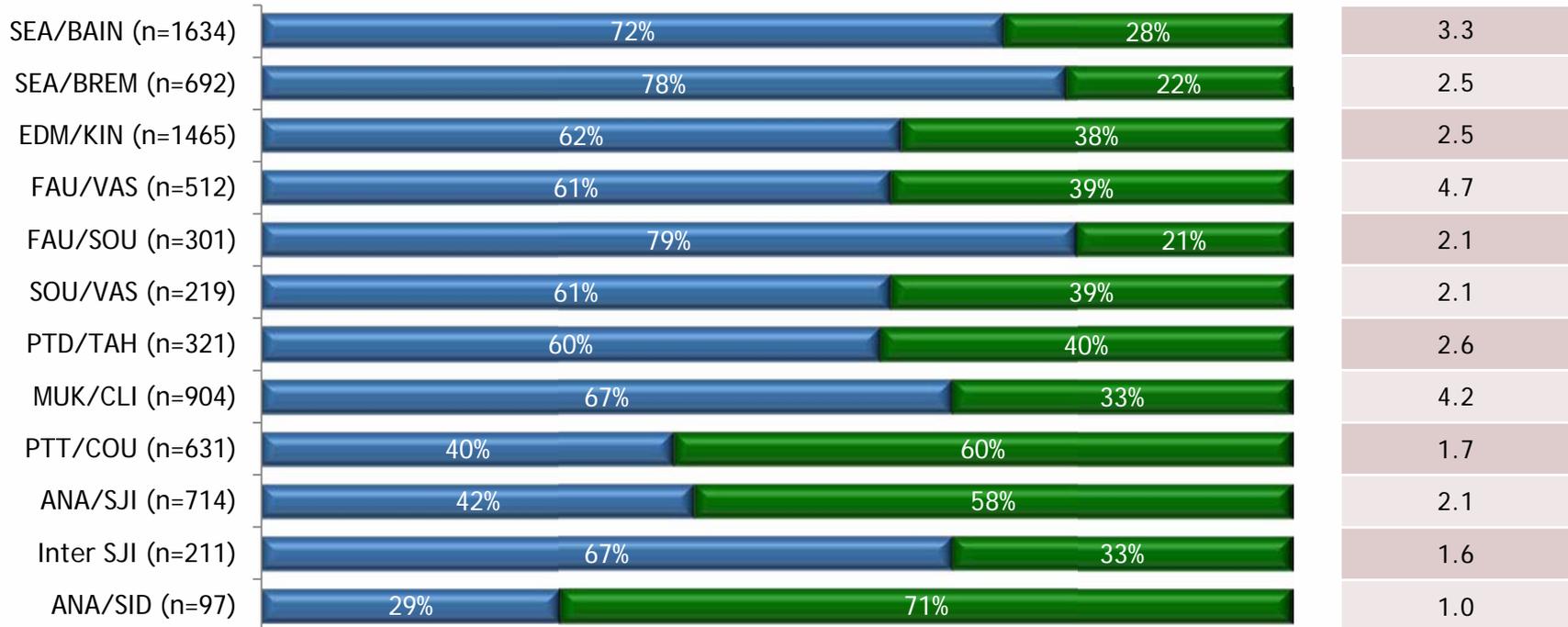


# Summer Period Ridership - Recreation

- ❖ Anacortes/Sidney (71%) and Port Townsend/Coupeville (60%) have the highest percentage of recreational or social trips per month; whereas Seattle/Bremerton (22%) and Fautleroy/Southworth (21%) have the lowest.

**Ratio of Recreational Trips Per Month**  
(of those who ride route)

■ Purposes other than recreational ■ Primarily for recreational

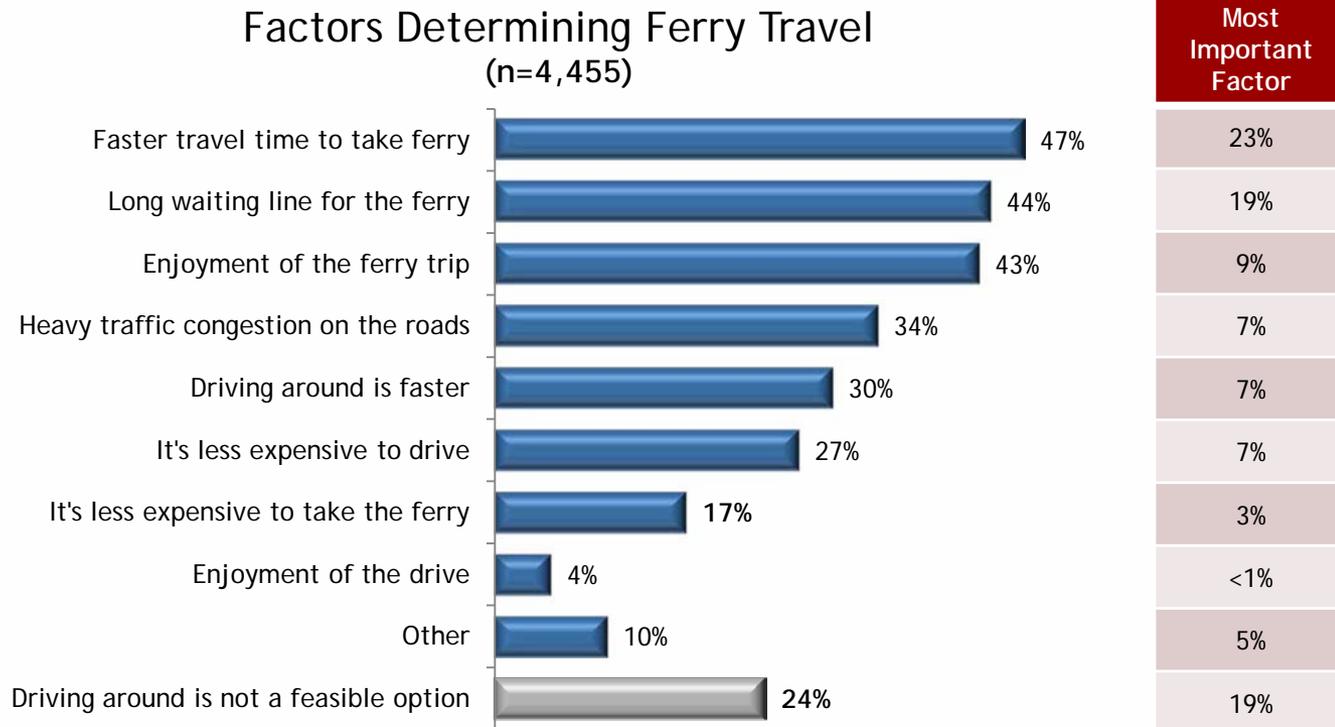


S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?



# Factors Driving Ferry Travel

- ❖ **Faster travel time to take the ferry is the main factor in deciding whether to take the ferry or drive around (47%).**
  - Recreational riders are more likely to state enjoyment of the ferry trip.
- ❖ **The primary deterrent to taking the ferry is the long lines waiting to catch the ferry (44%).**



Q21 For your non-commuting trips, when considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?

Q22 Which is the most important factor?



# Factors Driving Ferry Travel - By Route

Top Factors Determining Ferry Travel		SEA/ BAIN n=1011 n=1096	SEA/ BREM n=398 n=461	EDM/ KIN n=658 n=775	FAU/ VAS n=306 n=377	FAU/ SOU n=127 n=152	SOU/ VAS n=32 n=31	PTD/ TAH n=112 n=117	MUK/ CLI n=625 n=765	PTT/ COU n=107 n=85	ANA/ SJI n=349 n=202	INTR SJI n=30* n=28*	ANA/ SID n=44
Faster travel to take ferry	Summer	52%	39%	50%	16%	37%	37%	6%	54%	46%	21%	25%	13%
	Winter	55%	40%	51%	16%	38%	42%	16%	57%	46%	16%	10%	n/a
Long waiting line for the ferry	Summer	42%	32%	51%	10%	62%	40%	15%	45%	38%	25%	23%	40%
	Winter	40%	30%	50%	15%	55%	37%	11%	49%	33%	12%	9%	n/a
Enjoyment of the ferry trip	Summer	37%	52%	41%	13%	52%	40%	9%	29%	40%	24%	2%	27%
	Winter	38%	51%	40%	12%	52%	39%	10%	29%	49%	13%	13%	n/a
Heavy traffic on the roads	Summer	32%	57%	36%	9%	65%	39%	10%	21%	38%	17%	2%	53%
	Winter	33%	55%	32%	11%	54%	41%	9%	18%	31%	10%	9%	n/a
Driving around is faster	Summer	31%	41%	36%	7%	56%	34%	6%	20%	27%	13%	4%	40%
	Winter	29%	41%	36%	8%	52%	34%	10%	18%	22%	7%	20%	n/a
Less expensive to drive	Summer	32%	37%	33%	4%	38%	25%	3%	14%	25%	15%	3%	37%
	Winter	31%	39%	34%	5%	36%	35%	5%	14%	13%	9%	4%	n/a
Less expensive to take the ferry	Summer	14%	25%	17%	4%	19%	16%	3%	18%	19%	9%	1%	37%
	Winter	15%	24%	14%	6%	20%	24%	2%	21%	19%	7%	0%	n/a

\* Caution: Small sample sizes

Q21 For your non-commuting trips, when considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?



# Main Factor Driving Ferry Travel - By Route

Main Factor Determining Ferry Travel		SEA/ BAIN n=1004 n=1096	SEA/ BREM n=398 n=461	EDM/ KIN n=640 n=775	FAU/ VAS n=284 n=377	FAU/ SOU n=124 n=152	SOU/ VAS n=32 n=31	PTD/ TAH n=112 n=117	MUK/ CLI n=623 n=765	PTT/ COU n=104 n=85	ANA/ SJI n=302 n=202	INTR SJI n=29* n=28*	ANA/ SID n=40
Faster travel to take ferry	Summer	24%	11%	24%	9%	9%	4%	4%	34%	21%	14%	25%	11%
	Winter	29%	11%	23%	7%	12%	18%	8%	34%	22%	9%	1%	n/a
Long waiting line for the ferry	Summer	18%	7%	24%	4%	26%	9%	8%	30%	23%	13%	0%	7%
	Winter	13%	5%	23%	6%	19%	6%	6%	29%	13%	6%	7%	n/a
Enjoyment of the ferry trip	Summer	12%	16%	8%	6%	11%	12%	2%	5%	14%	11%	1%	22%
	Winter	10%	14%	11%	4%	11%	6%	2%	4%	22%	5%	1%	n/a
Heavy traffic on the roads	Summer	6%	14%	11%	1%	17%	4%	5%	3%	14%	5%	1%	11%
	Winter	6%	15%	5%	3%	16%	11%	1%	2%	10%	1%	1%	n/a
Driving around is faster	Summer	8%	12%	7%	0%	18%	17%	1%	3%	6%	5%	0%	37%
	Winter	8%	12%	8%	1%	17%	18%	3%	3%	4%	1%	10%	n/a
Less expensive to drive	Summer	9%	11%	12%	2%	7%	20%	1%	2%	9%	4%	2%	0%
	Winter	8%	13%	10%	0%	8%	7%	3%	3%	1%	2%	0%	n/a
Less expensive to take the ferry	Summer	3%	7%	3%	0%	3%	0%	0%	3%	3%	3%	0%	0%
	Winter	3%	9%	1%	2%	4%	0%	1%	3%	5%	1%	0%	n/a

Q22 Which is the most important factor?

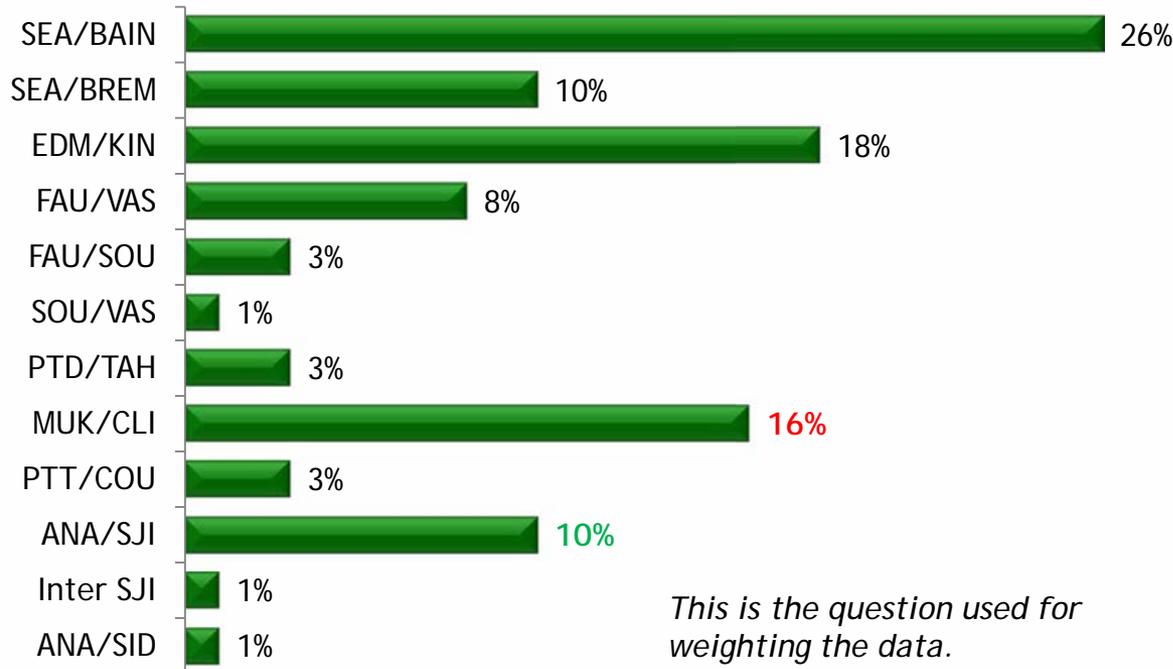
\* Caution: Small sample sizes



# Last Ferry Ride - By Route

- ❖ Seattle/Bainbridge (26%), Edmonds/Kingston (18%) and Mukilteo/Clinton (16%) remain atop the list of routes last ridden by respondents.

**Last Route Ridden**  
(n=4,233)



*This is the question used for weighting the data.*

	Winter 2010 (n=4,171)	Sumer 2008 (n=7,659)	Winter 2008 (n=5,471)
SEA/BAIN	27%	26%	28%
SEA/BREM	11%	11%	11%
EDM/KIN	19%	17%	19%
FAU/VAS	9%	8%	9%
FAU/SOU	4%	4%	3%
SOU/VAS	1%	<1%	<1%
PTD/TAH	3%	3%	3%
MUK/CLI	19%	16%	18%
PTT/COU	2%	3%	2%
ANA/SJI	5%	10%	6%
Inter SJI	1%	<1%	<1%
ANA/SID	--	2%	--

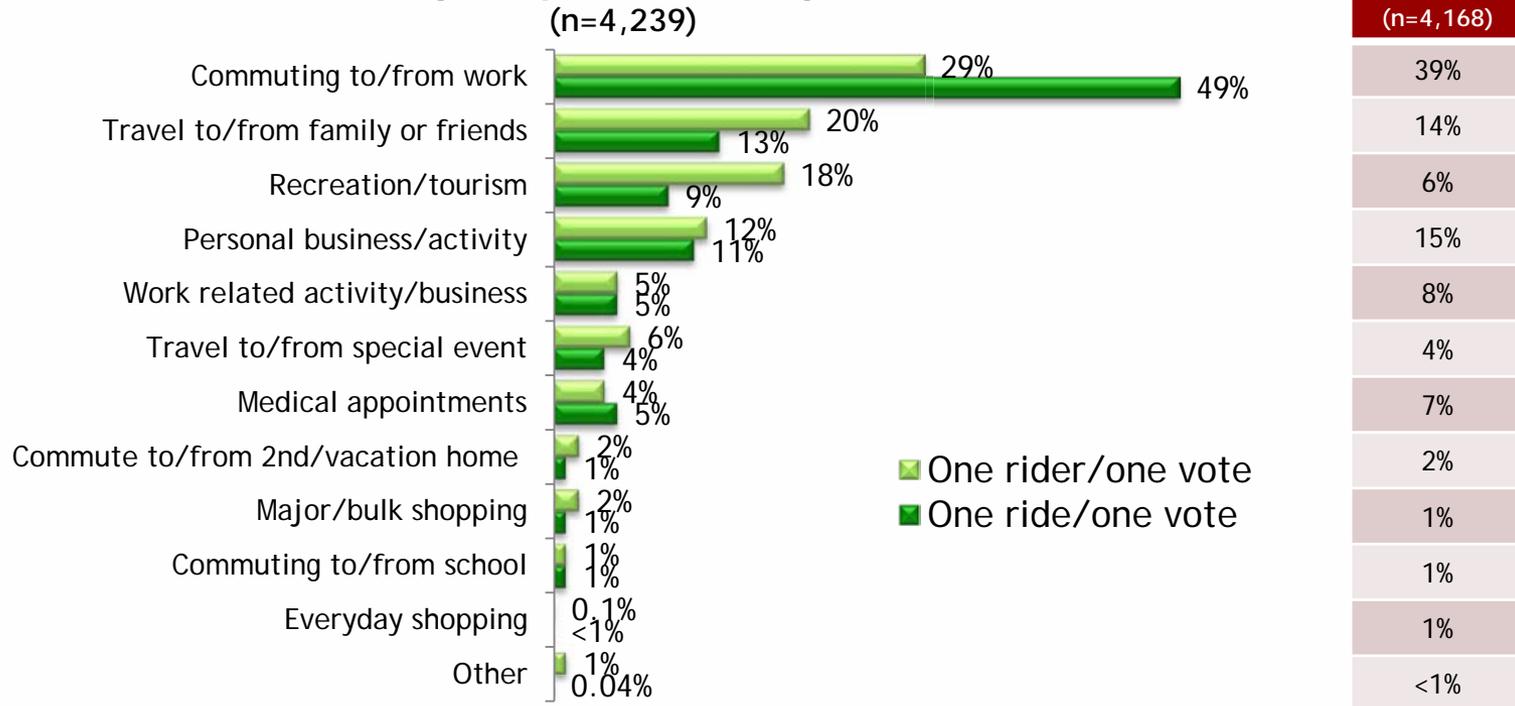
Q27 What was the last route that you rode?



# Purposes of Ferry Rides

- ❖ Although a smaller proportion (29% this year, 25% in 2008) of summer riders primarily ride to commute to and from work than in the winter wave (39% this year, 36% in 2008), the number of commuters is similar because total ridership is higher in summer.
- ❖ Commuters account for fewer than 1 out of 3 ferry riders (2 out of 5 in Winter), but account for nearly half the volume.

## Primary Purposes of Ferry Rides



Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?



# Purpose of Last Ferry Ride - By Route

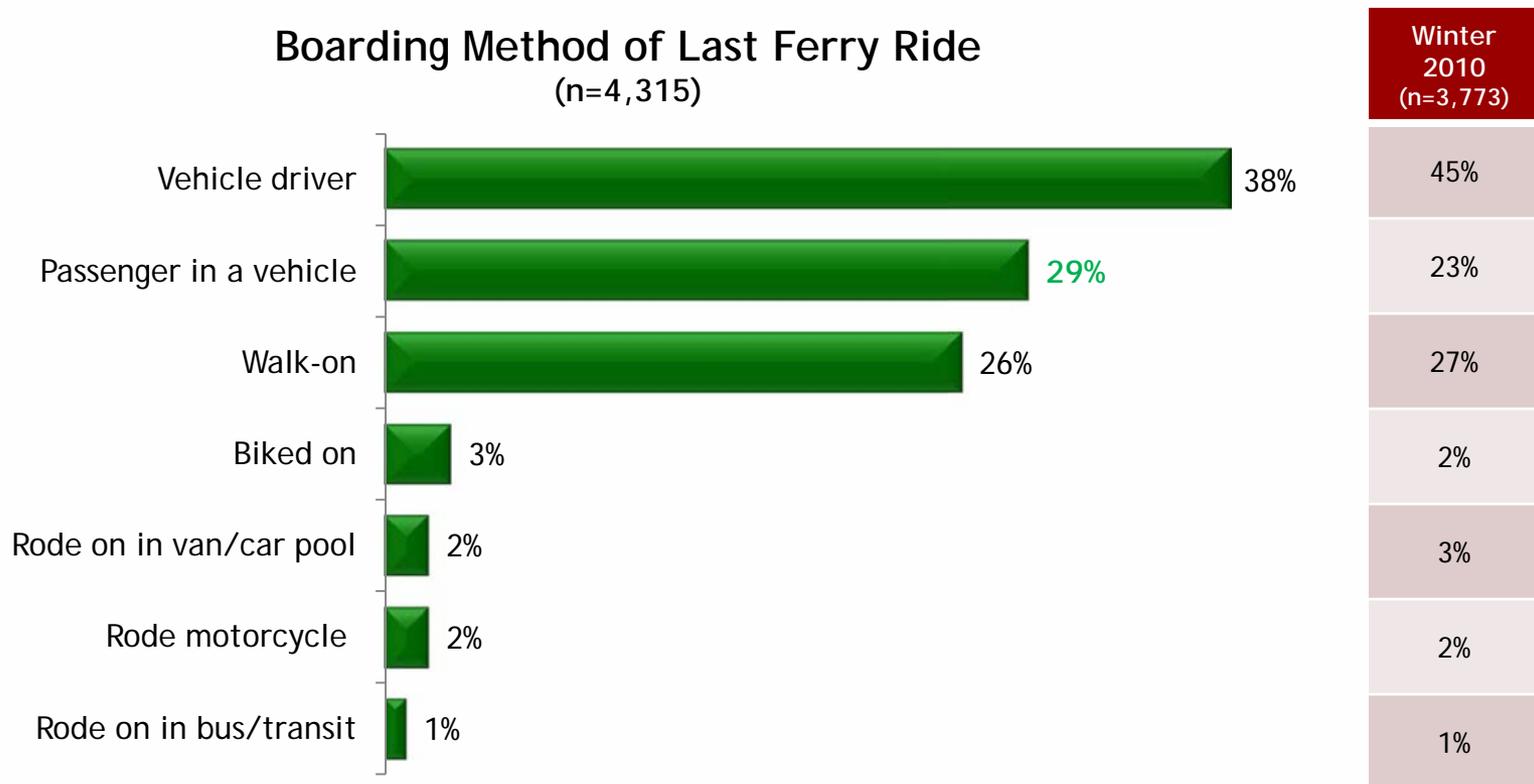
Top Purposes of Last Ferry		SEA/ BAIN n=1084 n=1120	SEA/ BREM n=421 n=476	EDM/ KIN n=770 n=795	FAU/ VAS n=326 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=32 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=695 n=775	PTT/ COU n=128 n=85	ANA/ SJI n=424 n=209	INTR SJI n=32 n=29*	ANA/ SID n=47
Commuting to/from work	Summer	40%	45%	22%	29%	50%	63%	19%	25%	4%	8%	12%	3%
	Winter	44%	53%	34%	44%	57%	68%	44%	33%	17%	13%	25%	n/a
Personal business/activity	Summer	11%	8%	10%	18%	9%	3%	23%	12%	9%	12%	24%	6%
	Winter	15%	12%	16%	16%	9%	0%	14%	16%	11%	23%	13%	n/a
Travel to/from family or friends	Summer	18%	18%	27%	16%	16%	8%	15%	21%	25%	17%	5%	16%
	Winter	11%	12%	19%	12%	18%	0%	14%	13%	27%	16%	0%	n/a
Work related activity/business	Summer	5%	6%	5%	9%	3%	0%	5%	4%	6%	5%	21%	0%
	Winter	7%	5%	9%	10%	5%	3%	5%	8%	5%	9%	29%	n/a
Medical appointments	Summer	4%	3%	3%	5%	4%	0%	2%	7%	2%	5%	5%	0%
	Winter	6%	3%	6%	6%	5%	3%	4%	12%	2%	16%	14%	n/a
Recreation/tourism	Summer	11%	10%	21%	11%	11%	14%	11%	15%	44%	37%	28%	69%
	Winter	6%	6%	8%	2%	4%	14%	2%	4%	16%	7%	3%	n/a
Travel to/from special event	Summer	6%	5%	6%	5%	5%	6%	13%	5%	7%	6%	5%	0%
	Winter	6%	4%	3%	3%	0%	6%	2%	3%	13%	3%	11%	n/a
Commuting to/from school	Summer	1%	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%
	Winter	2%	3%	1%	1%	0%	0%	3%	2%	1%	0%	3%	n/a
Commute to/from 2 <sup>nd</sup> home	Summer	1%	0%	2%	2%	0%	0%	1%	4%	0%	4%	0%	6%
	Winter	0%	0%	1%	1%	0%	0%	3%	3%	3%	5%	0%	n/a
Major/bulk shopping	Summer	2%	3%	2%	3%	0%	0%	5%	3%	2%	2%	1%	0%
	Winter	1%	0%	1%	2%	1%	3%	2%	2%	4%	4%	0%	n/a

Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?



# Boarding Method of Last Ferry Ride

- ❖ Two thirds of ferry riders boarded the ferry in a personal car, either as a **driver** or as a **passenger in a vehicle**, while about a quarter (26%) **walked-on**.
  - In 2008, roughly two thirds of riders boarded the ferry as either a passenger or driver (63% summer; 65% winter).



Q29 Thinking about your LAST FERRY RIDE ONLY, were you the vehicle driver, a passenger in a vehicle or did you walk onto the ferry?



# Boarding Method of Last Ride - By Route

- ❖ Seattle/Bainbridge, Seattle/Bremerton and Southworth/Vashon have a higher proportion of walk-on riders than other routes, in both the summer and winter months.

Boarding Method of Last Ferry Ride		SEA/ BAIN n=1085 n=1120	SEA/ BREM n=421 n=476	EDM/ KIN n=772 n=795	FAU/ VAS n=327 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=31 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=689 n=776	PTT/ COU n=125 n=85	ANA/ SJI n=426 n=210	INTR SJI n=32 n=29*	ANA/ SID n=47
Vehicle driver	Summer	27%	24%	44%	52%	51%	47%	52%	47%	36%	36%	55%	34%
	Winter	32%	23%	54%	57%	57%	59%	61%	54%	49%	56%	55%	n/a
Walk-on	Summer	42%	55%	14%	12%	11%	39%	12%	12%	21%	23%	8%	38%
	Winter	42%	61%	13%	14%	17%	39%	10%	14%	16%	9%	14%	n/a
Passenger in a vehicle	Summer	22%	16%	36%	31%	25%	2%	34%	34%	41%	41%	38%	28%
	Winter	20%	11%	27%	23%	16%	3%	25%	28%	37%	36%	28%	n/a
Rode on in van/car pool	Summer	2%	0%	4%	3%	7%	1%	0%	4%	0%	0%	0%	0%
	Winter	2%	1%	6%	3%	8%	0%	0%	4%	0%	0%	7%	n/a
Rode motorcycle	Summer	2%	2%	4%	2%	6%	6%	1%	3%	3%	1%	0%	0%
	Winter	2%	2%	2%	3%	7%	3%	1%	2%	1%	0%	0%	n/a
Biked on	Summer	6%	4%	0%	2%	2%	4%	2%	1%	2%	2%	1%	0%
	Winter	5%	4%	1%	1%	1%	0%	3%	1%	2%	1%	0%	n/a
Rode on in bus/transit	Summer	2%	1%	0%	1%	0%	1%	0%	1%	0%	0%	0%	0%
	Winter	0%	2%	1%	3%	0%	0%	2%	1%	0%	0%	0%	n/a

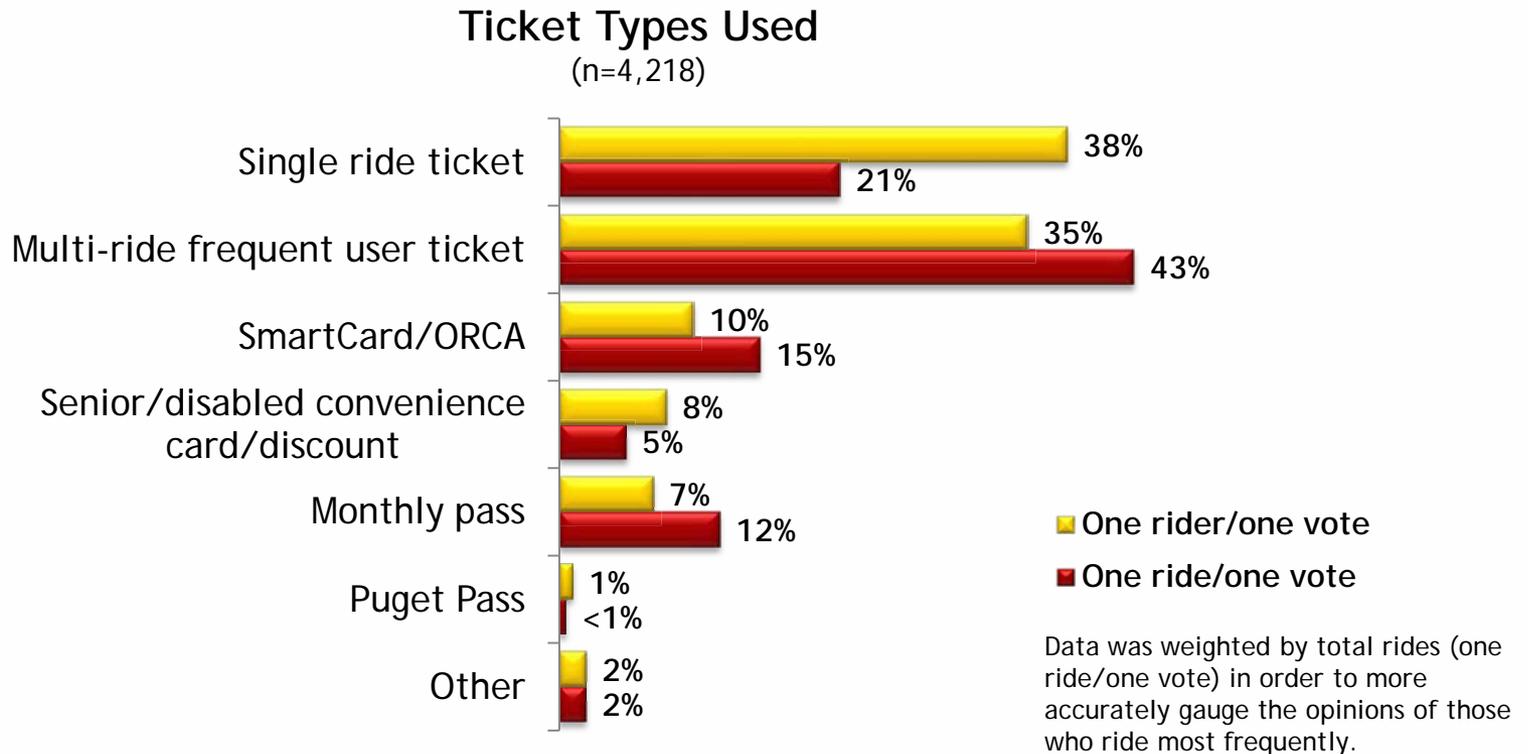
\* Caution: Small sample sizes

Q29 Thinking about your LAST FERRY RIDE ONLY, were you the vehicle driver, a passenger in a vehicle or did you walk onto the ferry?



# Ticket Types Used

- ❖ The most common ticket types for summer riders are **single ride tickets** (38%) and **multi-ride frequent user tickets** (35%).
- ❖ Multi-ride tickets account for 43% of the tickets by volume.



N26 Thinking about your most recent/current trip, what kind of ticket were you travelling on?



# Ticket Type of Last Ferry Ride - By Route

- ❖ Riders of the Edmonds/Kingston, Port Townsend/Coupeville and Anacortes/Sidney routes tend to be significantly more likely to travel on single fare tickets.
- ❖ Respondents on the Seattle/Bainbridge and Seattle/Bremerton routes are more likely to have used a monthly pass ticket on their last ferry ride.

Ticket Type	SEA/ BAIN n=1309	SEA/ BREM n=512	EDM/ KIN n=934	FAU/ VAS n=393	FAU/ SOU n=169	SOU/ VAS n=38	PTD/ TAH n=138	MUK/ CLI n=830	PTT/ COU n=153	ANA/ SJI n=516	INTR SJI n=39	ANA/ SID n=58
Single ride ticket	29%	35%	58%	16%	34%	11%	15%	29%	71%	45%	41%	81%
Multi-ride frequent user ticket	28%	20%	23%	60%	40%	50%	76%	48%	5%	44%	44%	9%
SmartCard/ORCA	19%	25%	2%	10%	14%	21%	4%	4%	1%	1%	5%	0%
Senior/disabled card/discount	9%	7%	9%	6%	5%	5%	4%	8%	20%	8%	5%	9%
Monthly pass	13%	11%	5%	3%	3%	14%	1%	6%	<1%	<1%	0%	0%
Puget Pass	<1%	<1%	0%	1%	<1%	0%	0%	<1%	1%	0%	0%	0%
Other	1%	2%	2%	4%	3%	0%	1%	6%	2%	1%	5%	0%

N26 Thinking about your most recent/current trip, what kind of ticket were you travelling on?

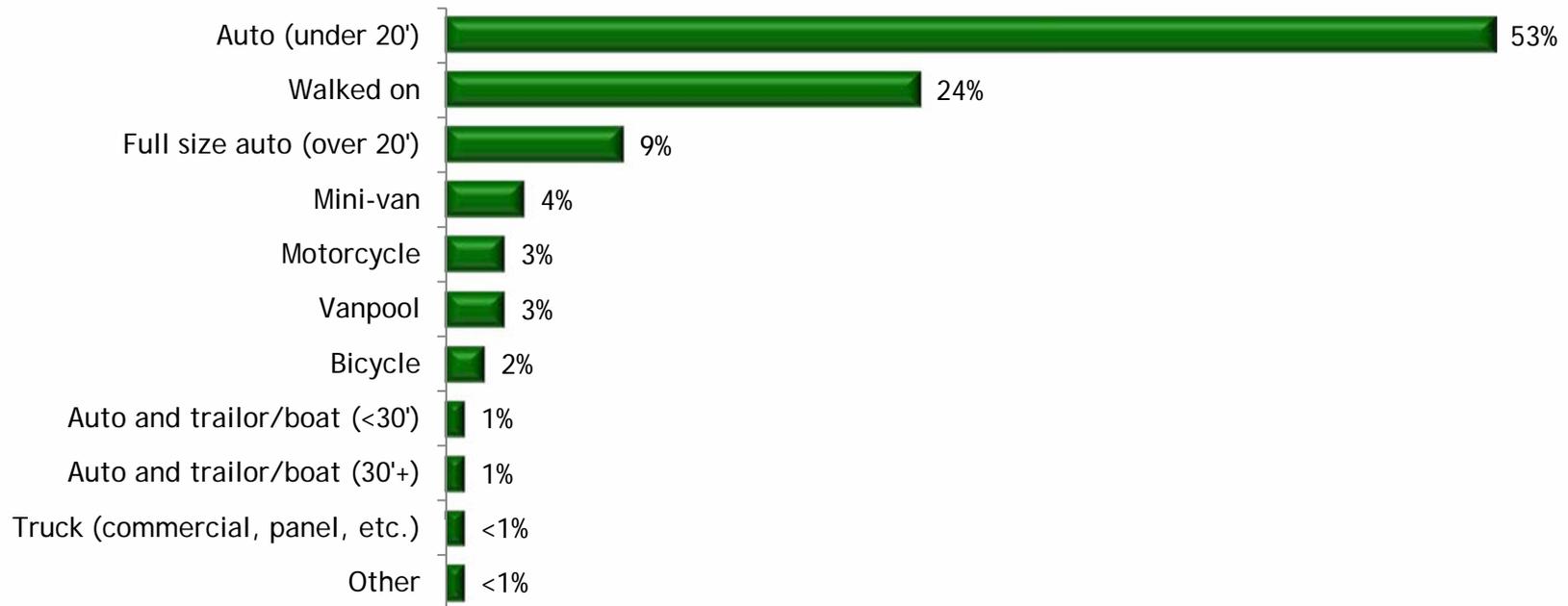


# Vehicle Type on Most Recent Trip

- ❖ 53% of riders boarded the ferry via an auto under 20' on their most recent ferry trip.
  - Less than 2% of all summer riders boarded the ferry with a combination of an auto and boat/trailer.

## Boarding Method of Last Trip

(n=4,250)



N27 Which of the following best describes the vehicle you drove on the ferry on you most recent/current trip?



# Vehicle Type of Most Recent Trip - By Route

- ❖ 71% of riders on the Fauntleroy/Vashon route boarded the ferry on an auto under 20'.
- ❖ Riders of the Anacortes/Sidney route tend to be significantly more likely to have boarded via a combination of an auto and trailer/boat under 30' in length.

Boarding Mode	SEA/ BAIN n=1318	SEA/ BREM n=512	EDM/ KIN n=941	FAU/ VAS n=398	FAU/ SOU n=170	SOU/ VAS n=38	PTD/ TAH n=139	MUK/ CLI n=840	PTT/ COU n=152	ANA/ SJI n=519	INTR SJI n=40	ANA/ SID n=58
Auto (under 20')	43%	36%	58%	71%	59%	47%	67%	61%	57%	56%	56%	31%
Walked on	36%	52%	14%	8%	9%	31%	11%	12%	21%	22%	7%	41%
Full-size auto (over 20')	7%	4%	11%	9%	10%	7%	11%	13%	5%	11%	24%	0%
Mini-van	3%	2%	6%	4%	5%	3%	8%	4%	5%	6%	7%	0%
Motorcycle	2%	3%	4%	3%	6%	6%	1%	3%	3%	1%	0%	0%
Vanpool	2%	0%	5%	3%	7%	1%	0%	6%	0%	0%	0%	0%
Bicycle	5%	3%	<1%	2%	2%	4%	2%	1%	2%	2%	1%	0%
Auto and trailer/boat (<30')	<1%	0%	1%	1%	0%	0%	0%	<1%	1%	<1%	2%	28%
Auto and trailer/boat (30'+)	<1%	0%	1%	0%	<1%	0%	1%	0%	4%	1%	0%	0%
Truck (commercial, panel, etc.)	0%	<1%	<1%	0%	<1%	0%	1%	<1%	<1%	<1%	4%	0%
Other	<1%	0%	0%	0%	<1%	1%	0%	<1%	0%	0%	0%	0%

N27 Which of the following best describes the vehicle you drove on the ferry on you most recent/current trip?



# Recreational and Social Travel



# Key Findings

- ❖ Respondents indicate that the number of ferry rides for recreation, social or special event purposes are largely unchanged compared to last year.
- ❖ Visiting family and friends is by far the most frequently mentioned purpose of riders' last recreational or social trip.
- ❖ Only 13% of recreational riders report that their last trip was part of a larger multi-state or multi-nation trip.
  - Those on the Port Defiance/Tahlequah route tend to be significantly more likely than others to have taken a ferry ride as part a multi-state or multi-nation trip.
- ❖ When asked why they chose WSF over other ways of commuting to their destination, the most commonly mentioned response among recreational riders was because it is the fastest/most direct way.
  - Those on the Seattle/Bremerton and Fauntleroy/Southworth routes tend to be significantly more likely than other riders to have chosen the ferry due to reasons related to enjoyment.
- ❖ Nearly one third of recreational riders could not offer any suggestions regarding areas in which they would like to see WSF improve, however the most common suggestion was the addition of more runs.
- ❖ Overall, riders feel that WSF is a good value during the summer season; though only 14% rate it as a "very good value."
  - Generally, respondents from the Port Townsend/Coupeville route are significantly more likely to give WSF positive value ratings than riders of other routes.



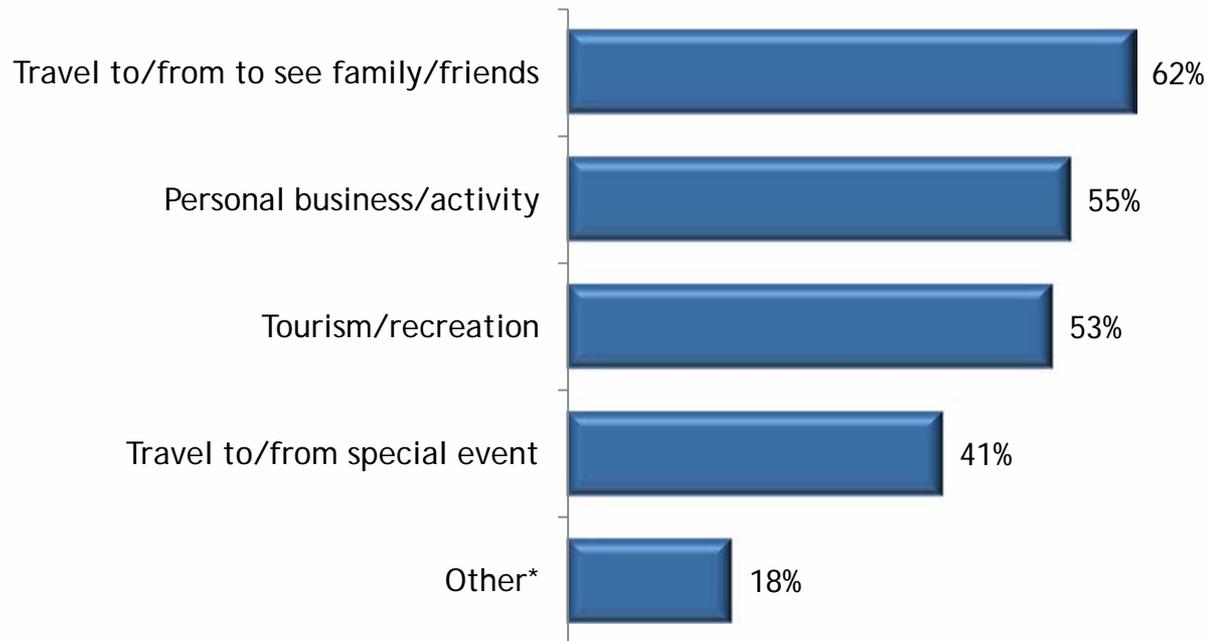
# Summer Period Ridership - Purpose

- ❖ During the summer season, 62% of respondents indicate **travel to/from to see family/friends** as a reason for ferry ridership, followed closely by the purposes of **personal business/activity** (55%) and **tourism/recreation** (53%).

## Purpose of Summer Ridership

(of those who ride route)

(n=4,278)



\*No "other" accounts for more than 4% of total.

S3 During the Summer period, have you taken, or will you take, a trip on the ferry system for any of these purposes?



# Summer Ridership Purpose - By Route

- ❖ 70% of riders on the Port Townsend/Coupeville route indicate riding for the purpose of **tourism/recreation**, significantly more than riders of other ferry routes.
  - In addition, 64% of those on the Port Defiance/Tahlequah route mention using the ferry for the purpose of **travel to/from special events**.

Summer Trip Purpose	SEA/ BAIN n=1320	SEA/ BREM n=512	EDM/ KIN n=928	FAU/ VAS n=395	FAU/ SOU n=167	SOU/ VAS n=40	PTD/ TAH n=139	MUK/ CLI n=836	PTT/ COU n=152	ANA/ SJI n=520	INTR SJI n=40	ANA/ SID n=54
Travel to/from to see family/friends	65%	55%	60%	73%	57%	63%	85%	66%	56%	52%	58%	50%
Personal business/activity	58%	49%	45%	74%	43%	52%	75%	67%	45%	47%	69%	30%
Tourism/recreation	50%	39%	53%	56%	39%	51%	58%	55%	70%	63%	51%	77%
Travel to/from special event	53%	42%	35%	47%	44%	47%	64%	40%	32%	22%	24%	17%
Travel to/from work/school/business related	3%	5%	4%	4%	4%	3%	3%	4%	3%	4%	<1%	0%
Travel to/from 2 <sup>nd</sup> /vacation home	1%	1%	3%	1%	0%	0%	1%	4%	1%	4%	<1%	7%
Travel to/from airport	1%	1%	1%	1%	0%	2%	2%	2%	1%	<1%	<1%	0%
Other	11%	17%	9%	15%	13%	16%	12%	13%	5%	9%	9%	6%

S3 During the Summer period, have you taken, or will you take, a trip on the ferry system for any of these purposes?



# Change in Summer Ridership

- ❖ 23% of respondents say the number of recreational trips where they used the ferries has **increased** compared to 2009.
  - About two thirds of respondents indicate their travel for recreational, social or special event trips using the ferries has neither increased nor decreased since last year.
- ❖ Of those reporting increased recreational trips, “more activities/trips planned or more travel opportunities” (25%) and “experiencing more social interaction” (17%) were the top mentioned reasons for the increase.
- ❖ Of the 13% indicating a decrease in recreational trips, the most commonly mentioned reasons for the decrease include “too expensive” (35%), “economy/budget limitations” (17%) and “too much delay/dislike waiting in line” (14%).

■ Decreased   ■ Stayed the same   ■ Increased



- N1 Compared to 2009, has the number of your special event (i.e. ball games/concerts/etc.) trips where you used the ferries increased, stayed the same, or decreased?
- N2 Compared to 2009, has the number of your social (i.e. see friends/family/etc.) trips where you used the ferries increased, stayed the same, or decreased?
- N3 Thinking about the trips you take for recreational purposes, has the number of your recreational trips where you used the ferries increased, stayed the same or decreased as compared to 2009?



# Change in Summer Ridership - By Route

❖ Change in summer period ridership is generally uniform across all routes. However, riders of the Anacortes/San Juan Islands and Anacortes/Sidney routes tend to be significantly more likely to have **increased** the number of recreational trips compared to last year.

Change in Summer Ridership	SEA/ BAIN	SEA/ BREM	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTD/ TAH	MUK/ CLI	PTT/ COU	ANA/ SJI	INTR SJI	ANA/ SID
Recreational Trips	n=812	n=258	n=601	n=290	n=87	n=24*	n=109	n=530	n=118	n=366	n=29*	n=45
Increased	18%	20%	24%	20%	21%	15%	16%	23%	27%	31%	33%	72%
Decreased	12%	18%	17%	10%	17%	9%	9%	14%	12%	9%	7%	8%
Social Trips	n=865	n=280	n=553	n=286	n=94	n=25*	n=119	n=551	n=84	n=265	n=22*	n=27*
Increased	20%	21%	25%	22%	22%	14%	13%	21%	24%	27%	14%	33%
Decreased	13%	18%	13%	15%	12%	23%	16%	13%	19%	11%	13%	7%
Special Event Trips	n=703	n=218	n=319	n=184	n=74	n=19*	n=89	n=337	n=48	n=110	n=9*	n=8*
Increased	16%	22%	23%	23%	22%	6%	11%	19%	27%	27%	19%	60%
Decreased	14%	19%	23%	16%	24%	9%	9%	15%	20%	17%	31%	0%

\* Caution: Small sample sizes

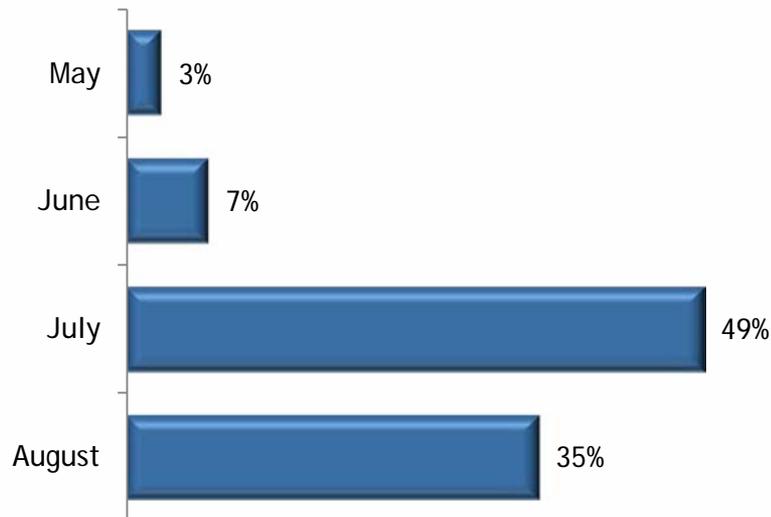
- N1 Compared to 2009, has the number of your special event (i.e. ball games/concerts/etc.) trips where you used the ferries increased, stayed the same, or decreased?
- N2 Compared to 2009, has the number of your social (i.e. see friends/family/etc.) trips where you used the ferries increased, stayed the same, or decreased?
- N3 Thinking about the trips you take for recreational purposes, has the number of your recreational trips where you used the ferries increased, stayed the same or decreased as compared to 2009?



# Most Recent Recreational and Social Trip

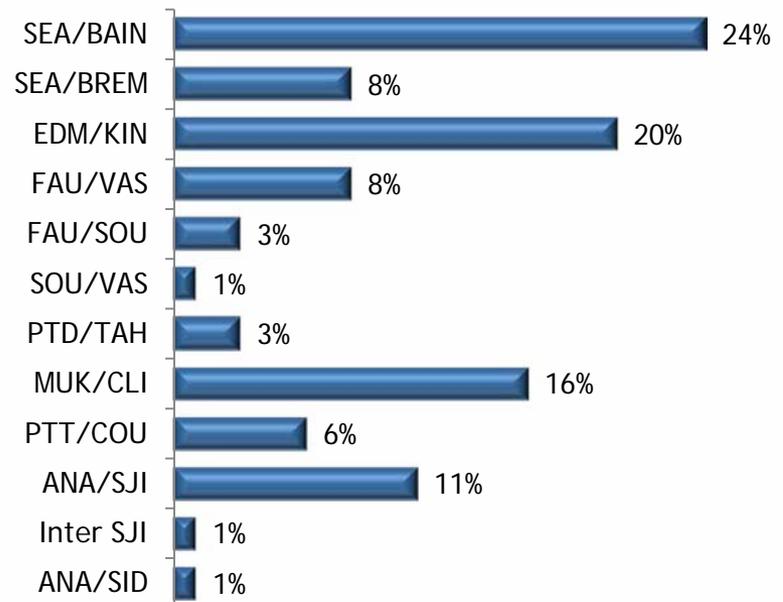
- ❖ The Seattle/Bainbridge (24%) and Edmonds/Kingston (20%) are the routes ridden most often for riders' most recent recreational or social trip.
  - Due to the fielding period of the survey (closed August 18, 2010), the number of respondents indicating their last recreational or social trip was in August may be lower than expected.

Month of Last Recreational/Social Trip\*  
(n=3,841)



\*All other months account for 1% or less of the total

Route of Last Recreational/Social Trip  
(n=3,847)



N5 In which month did you take your most recent recreational or social trip that used the Washington State Ferries?

N6 What was the route that you rode for your most recent recreational or social trip?

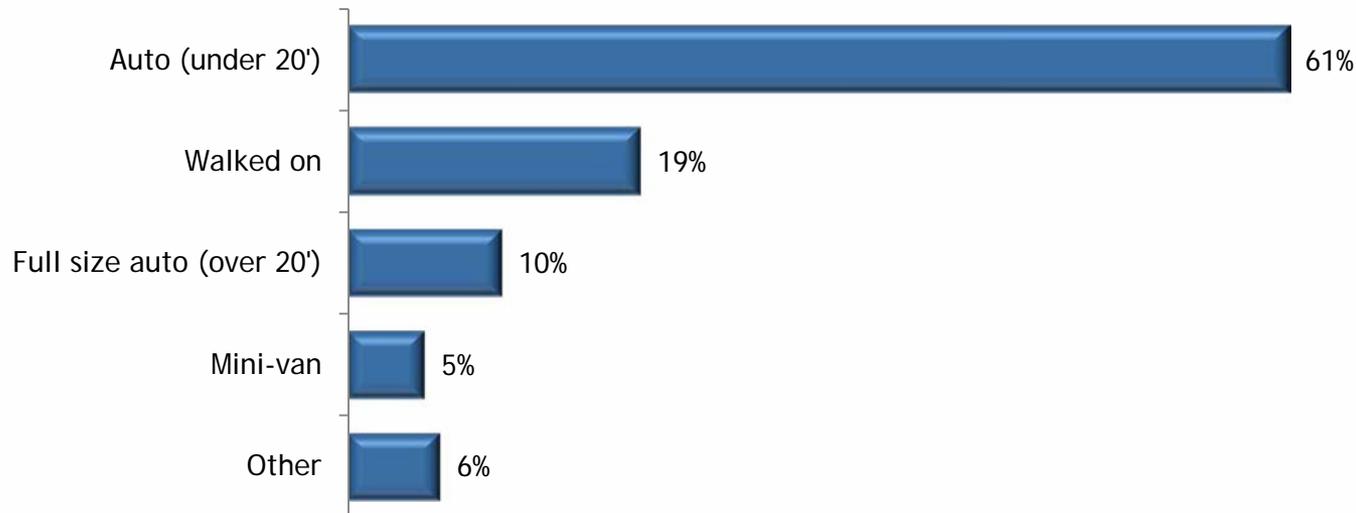


# Boarding Method

- ❖ 61% boarded the ferry in an auto under 20', while 19% walked on during their last recreational or social trip.
  - One percent or less boarded the ferry via motorcycle, bicycle or an auto/trailer combination on their most recent recreational or social trip.
- ❖ Of those boarding in a private multi-passenger vehicle, 62% were the driver of the vehicle.

## Boarding Method of Last Recreational/Social Trip

(n=3,868)



N7 Which of the following best describes how you boarded the ferry on your most recent recreational or social trip?

N7A Were you the driver or a passenger?

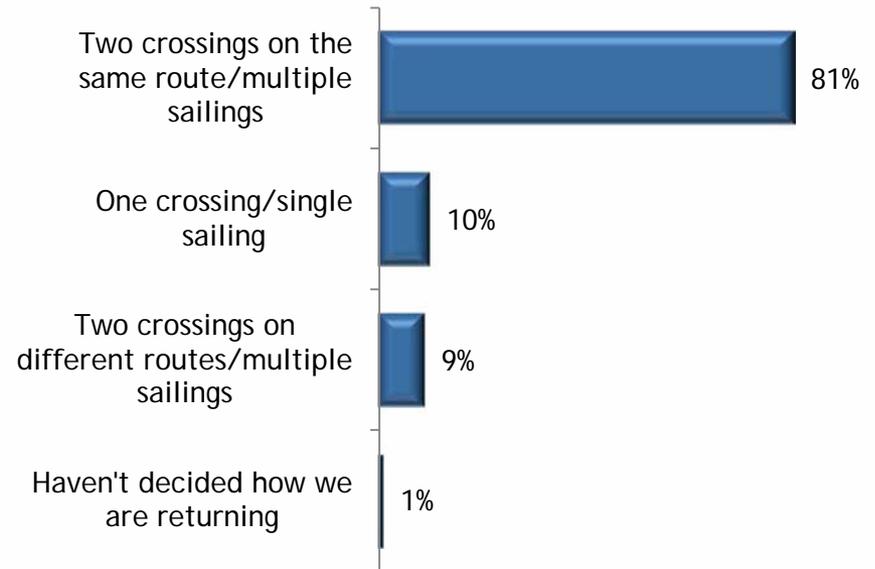


# Duration of Most Recent Trip

- ❖ The vast majority (81%) of riders took **two crossings on the same route** during their last social or recreational trip.
  - Riders on the Anacortes/Sidney (47%) and Fautleroy/Southworth (33%) routes are significantly more likely to have taken only one crossing.
- ❖ The table below details the median number of days of respondent's most recent social or recreational trip using WSF.
- ❖ The median duration of riders' most recent social or recreational trip was **two days**.
  - Anacortes/Sidney riders have the highest median trip duration of all routes at four days.

## Number of Crossings on Most Recent Trip

(n=3,873)



Trip Duration	Total n=3702	SEA/ BAIN n=1104	SEA/ BREM n=381	EDM/ KIN n=819	FAU/ VAS n=353	FAU/ SOU n=129	SOU/ VAS n=31	PTD/ TAH n=131	MUK/ CLI n=752	PTT/ COU n=143	ANA/ SJI n=477	INTR SJI n=34	ANA/ SID n=58
Median # of Days	2	1	1	2	1	1	1	1	2	3	3	3	4

N8 Thinking of your most recent recreational or social trip using Washington State Ferries, what was the duration of the trip?

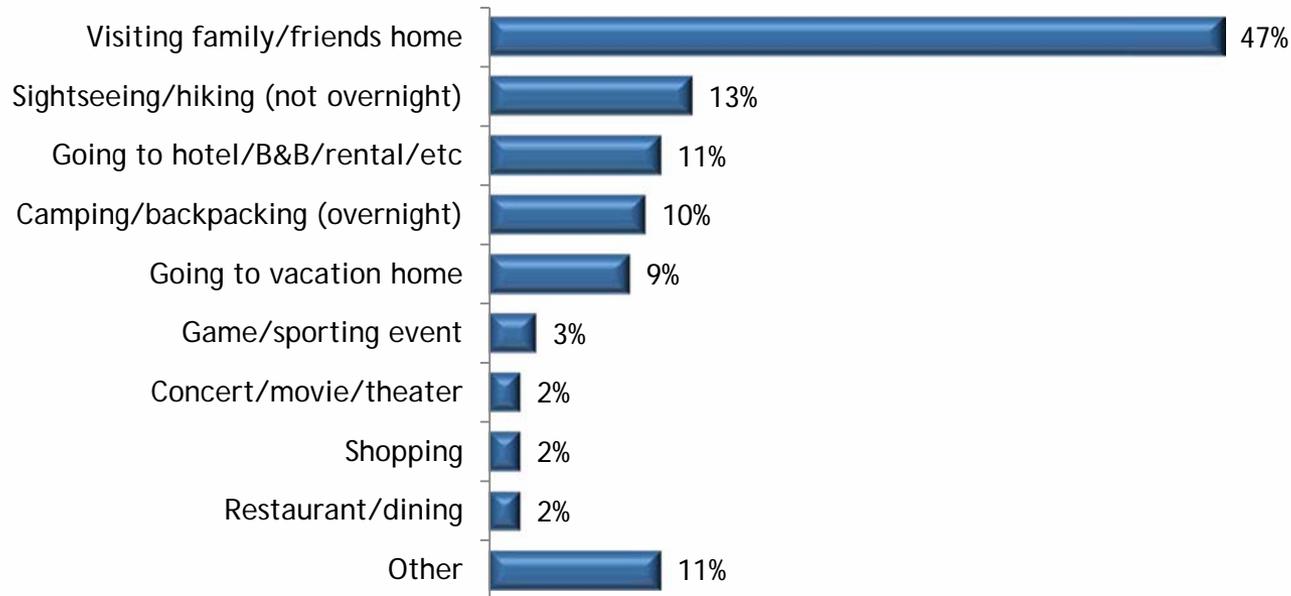
N9 On your most recent recreational or social trip using Washington State Ferries, how many crossings or sailings did you take?



# Purpose of Most Recent Trip

- ❖ Nearly half (47%) report **visiting family/friends** as the purpose of their last recreational or social trip using the ferry.
  - A small amount of riders (5% or less) indicate the purpose of their trip was to **attend a game or sporting event, concert or movie and shopping.**

**Purpose of Last Recreational/Social Trip**  
(n=3,851)



N10 Which of the following best describes your most recent recreational or social trip?



# Purpose of Most Recent Trip - By Route

- ❖ Little variability exists among routes regarding the purpose of riders' last recreational or social trip.
  - However, 23% of riders on the Seattle/Bremerton route indicating their purpose as a **single-day** sightseeing or hiking trip is significantly higher than riders of other routes.

Purpose of Summer Trip	SEA/ BAIN n=1182	SEA/ BREM n=414	EDM/ KIN n=842	FAU/ VAS n=369	FAU/ SOU n=133	SOU/ VAS n=34	PTD/ TAH n=135	MUK/ CLI n=773	PTT/ COU n=147	ANA/ SJI n=473	INTR SJI n=34	ANA/ SID n=58
Visiting family/friend's home	48%	47%	49%	56%	56%	36%	54%	48%	40%	37%	60%	31%
Sightseeing/hiking (not overnight)	12%	23%	11%	11%	15%	25%	6%	13%	18%	12%	4%	3%
Going to hotel/B&B/etc	9%	9%	12%	8%	10%	8%	9%	10%	17%	18%	30%	19%
Camping/backpacking (overnight stay)	7%	5%	10%	7%	5%	8%	21%	7%	19%	18%	6%	34%
Going to vacation home	8%	2%	10%	7%	10%	4%	6%	15%	3%	13%	5%	9%
Game/sporting event	4%	3%	2%	4%	2%	8%	5%	1%	2%	<1%	<1%	0%
Concert/movie/theater	3%	1%	2%	3%	0%	0%	0%	1%	1%	<1%	<1%	0%
Shopping	2%	4%	2%	1%	1%	0%	2%	4%	2%	2%	1%	0%
Restaurant/dining	3%	13	2%	2%	<1	0%	0%	2%	<1%	<1%	<1%	0%

N10 Which of the following best describes your most recent recreational or social trip?

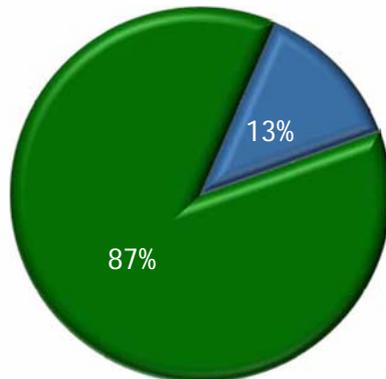


# Destination and Relative Cost

- ❖ 87% of riders stayed within Washington State on their last social or recreational trip.
- ❖ One third of riders report that the ferry fare accounted for less than 10% of the total cost of their most recent trip.
  - 41% say that the fare accounted for 25% or more of the total cost of the trip.

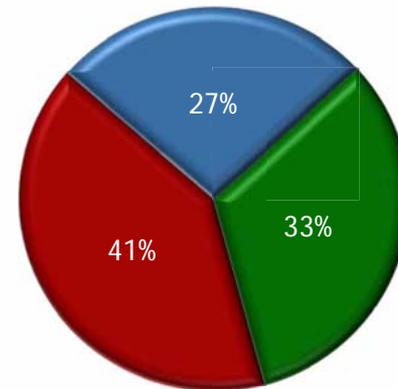
**Destination of Last  
Recreational/Social Trip**  
(n=3,864)

■ Washington State only ■ Multi-State/Multi-nation



**Relative Cost of Last  
Recreational/Social Trip**  
(n=3,855)

■ 25% or more ■ 10-25% ■ Less than 10%



N11 Was your most recent recreational or social trip part of a...trip?

N12 How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent recreational or social trip?



# Destination and Relative Cost - By Route

- ❖ Riders of the Port Defiance/Tahlequah route (33%) tend to be significantly more likely to have ridden the ferry as part of a **multi-state or multi-nation trip**.
- ❖ The relative cost of the ferry fare is generally consistent among riders of all routes, however riders on the Port Townsend/Coupeville and Mukilteo/Clinon routes tend to be more likely than others to spend **10% or less** of their trip cost on ferry travel.

Destination of Trip	SEA/ BAIN n=1196	SEA/ BREM n=414	EDM/ KIN n=842	FAU/ VAS n=371	FAU/ SOU n=134	SOU/ VAS n=34	PTD/ TAH n=136	MUK/ CLI n=771	PTT/ COU n=144	ANA/ SJI n=474	INTR SJI n=34	ANA/ SID n=58
Washington State only	87%	94%	91%	87%	96%	87%	67%	83%	87%	84%	88%	60%
Multi-state/multi-nation	13%	6%	9%	13%	4%	13%	33%	17%	13%	16%	12%	40%

Relative Cost of Ferry Fare	SEA/ BAIN n=1188	SEA/ BREM n=414	EDM/ KIN n=836	FAU/ VAS n=375	FAU/ SOU n=135	SOU/ VAS n=33	PTD/ TAH n=136	MUK/ CLI n=773	PTT/ COU n=145	ANA/ SJI n=477	INTR SJI n=34	ANA/ SID n=54
Less than 10% of total	31%	25%	31%	28%	24%	37%	43%	41%	47%	29%	39%	23%
10-25% of total	25%	32%	27%	29%	31%	18%	18%	23%	26%	31%	13%	17%
More than 25% of total	43%	43%	42%	43%	45%	45%	39%	35%	27%	40%	48%	60%

N11 Was your most recent recreational or social trip part of a...trip?

N12 How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent recreational or social trip?

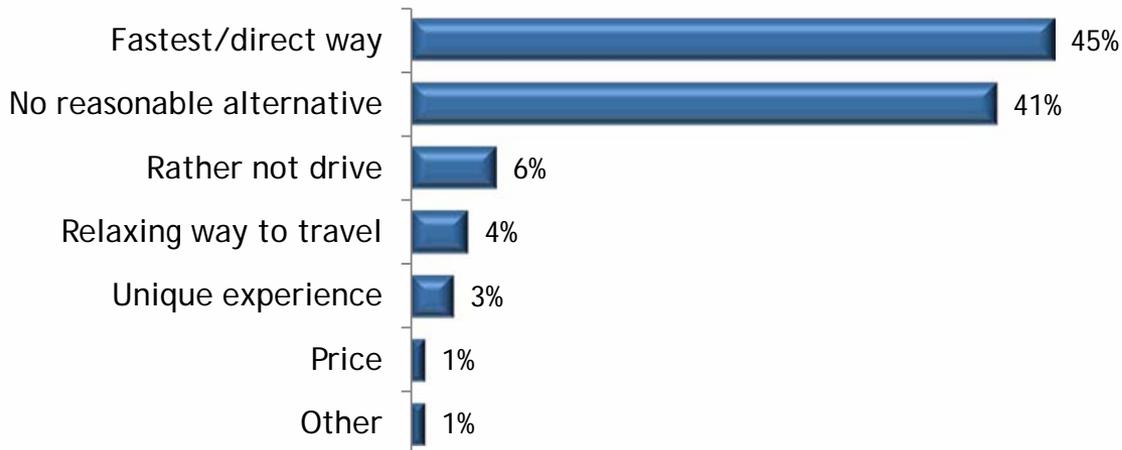


# Reasons for Ferry Travel

- ❖ Respondents report that the ferry system being the “fastest or most direct way” or that they have “no reasonable alternative” as the reasons that they chose WSF on their last social or recreational trip.
- ❖ Almost all (98%) respondents say they are likely to consider WSF for recreational or social trips in the future, with 82% saying they “definitely will.”
  - Of the 2% that indicated they would not consider using WSF in the future, the most commonly mentioned reasons include the ferries being too expensive and long lines and wait times.

## Most Important Reason for Ferry Travel

(n=3,851)



N13a Which of the following reasons best describes why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?

N14 How likely would you be to consider using Washington State Ferries again for a recreational or social trip?

N15 Why would you not consider using the Washington State Ferries again?



# Reasons for Ferry Travel - By Route

- ❖ Riders' reasons for choosing WSF vary substantially depending on the route taken.
- ❖ Respondents on the Seattle/Bremerton and Fauntleroy/Southworth routes tend to be significantly more likely than others to mention choosing the ferries for **enjoyment** reasons, in addition to the convenience of quick travel.

Reasons for Ferry Travel	SEA/ BAIN n=1194	SEA/ BREM n=412	EDM/ KIN n=829	FAU/ VAS n=375	FAU/ SOU n=135	SOU/ VAS n=34	PTD/ TAH n=136	MUK/ CLI n=771	PTT/ COU n=144	ANA/ SJI n=471	INTR SJI n=34	ANA/ SID n=58
Fastest/most direct way	56%	41%	67%	3%	43%	26%	2%	58%	62%	10%	<1%	22%
No reasonable alternative	33%	12%	22%	96%	11%	57%	97%	36%	29%	81%	77%	41%
Rather not drive	5%	24%	5%	<1%	29%	8%	0%	1%	2%	1%	0%	6%
Relaxing way to travel	4%	13%	3%	0%	13%	8%	0%	2%	4%	2%	0%	3%
Unique experience	1%	7%	3%	<1%	2%	0%	2%	2%	3%	3%	0%	28%
Price	1%	1%	<1%	0%	1%	0%	0%	<1%	<1%	2%	23%	0%
Other	<1%	1%	1%	<1%	1%	0%	0%	<1%	1%	1%	0%	0%

N13a Which of the following reasons best describes why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?

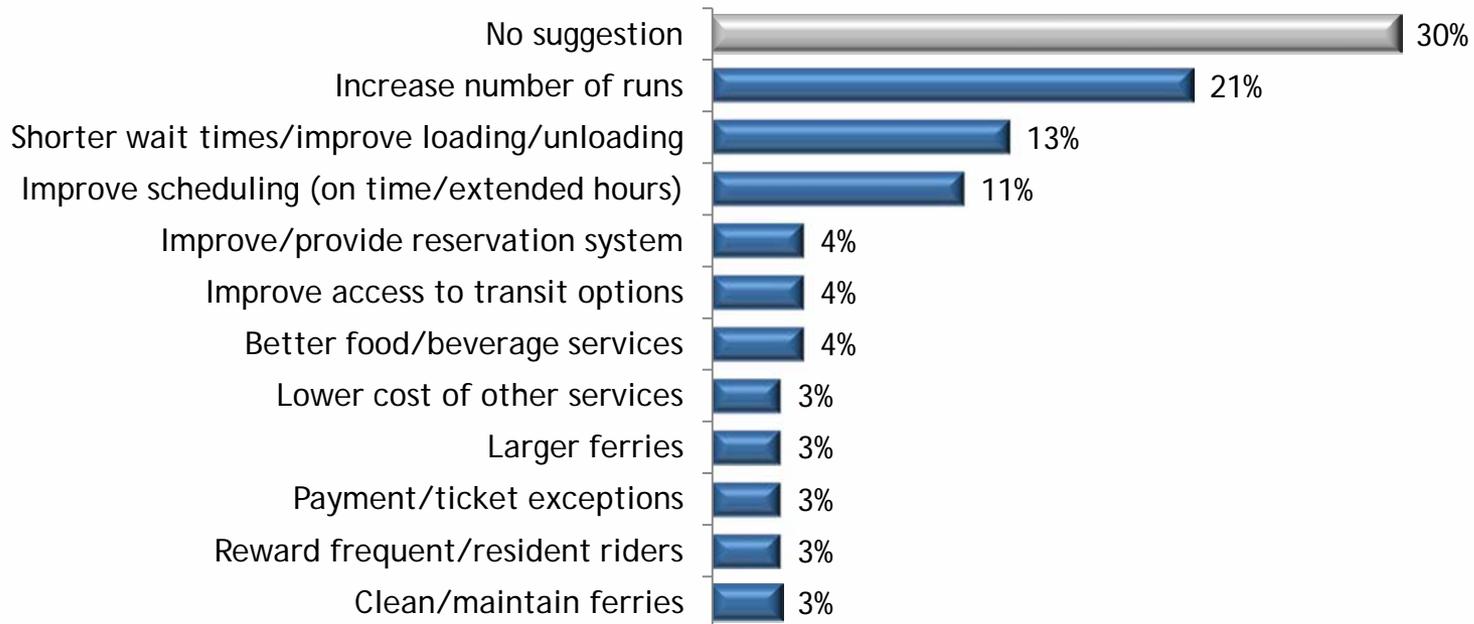


# Suggestions for Improvement

- ❖ When asked what WSF could do, other than lower fares, to increase recreational ferry trips, 21% mentioned **increasing the number of ferry runs**.
- ❖ 30% did not provide a suggestion for an area in which WSF could improve.

## Suggested Improvements

(n=3,899)



N16 *Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips people, like you, make in a year?*



# Suggestions for Improvement - By Route

Suggested Improvements	SEA/ BAIN n=987	SEA/ BREM n=341	EDM/ KIN n=699	FAU/ VAS n=308	FAU/ SOU n=112	SOU/ VAS n=28*	PTD/ TAH n=112	MUK/ CLI n=641	PTT/ COU n=122	ANA/ SJI n=396	INTR SJI n=28*	ANA/ SID n=47
Increase number of ferry runs	18%	20%	23%	22%	33%	29%	22%	21%	27%	23%	16%	16%
Shorter wait times/lines/ improve loading/unloading	13%	6%	17%	9%	11%	5%	2%	18%	7%	12%	4%	6%
Improve scheduling	9%	19%	9%	10%	14%	8%	26%	6%	5%	17%	34%	6%
Better food/beverage services	6%	7%	3%	3%	2%	0%	1%	1%	4%	7%	5%	9%
Improve access to add'l transit options	4%	4%	4%	5%	3%	4%	2%	4%	3%	3%	0%	3%
Improve/provide reservation system	2%	3%	4%	2%	3%	4%	0%	3%	6%	10%	5%	0%
Lower cost of other services (food, parking, etc.)	5%	5%	3%	3%	1%	3%	0%	1%	2%	4%	3%	6%
Larger ferries	2%	1%	3%	6%	3%	0%	5%	5%	13%	2%	3%	3%
Payment/ticket exceptions/options	5%	4%	3%	2%	2%	0%	2%	2%	<1%	3%	<1%	0%
Reward frequent/ resident riders	3%	1%	1%	2%	3%	0%	2%	7%	1%	5%	6%	3%
Clean/maintain ferries	2%	7%	2%	2%	3%	0%	0%	2%	2%	5%	<1%	0%
No Suggestion	34%	20%	32%	30%	21%	36%	29%	32%	32%	24%	32%	21%

\* Caution: Small sample sizes

N16 Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips people, like you, make in a year?

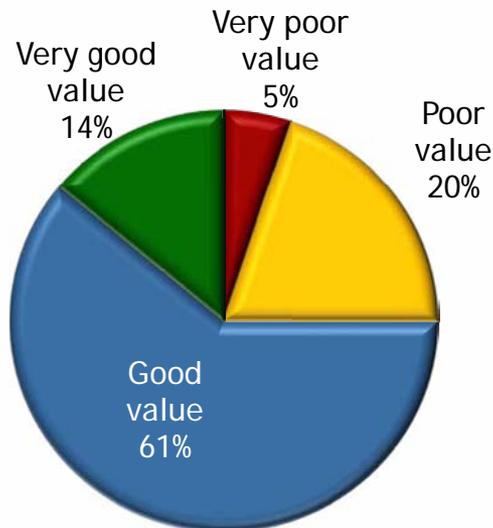


# Perceived Summer Value - By Rider

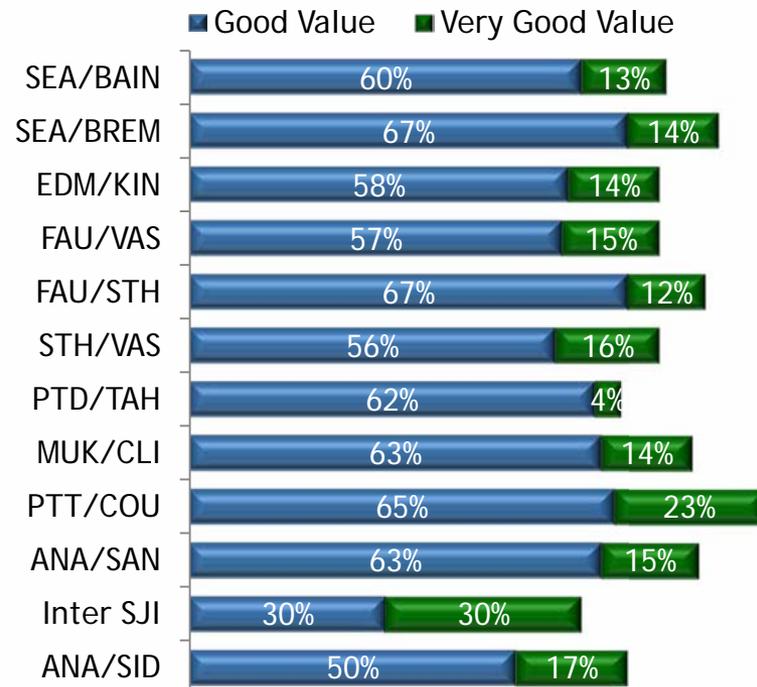
- ❖ 75% of riders feel that WSF is a **good value** during the Summer season; however, only 14% rate it as a "very good value."
  - Those on the Port Townsend/Coupeville route tend to be significantly more likely to positively rate the value of WSF than riders of other routes.
  - Frequent riders give significant lower ratings than less-frequent riders (11% "very good value," vs. 21%).

## Perceived Summer Value

(n=3,898)



## Perceived Value - By Route



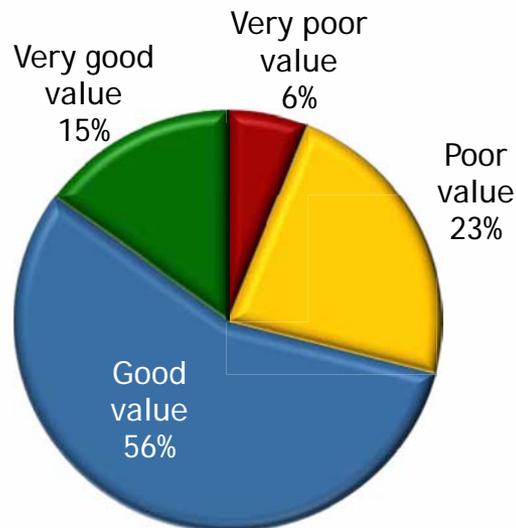
N17 During the Summer season, do you feel that Washington State Ferries is...



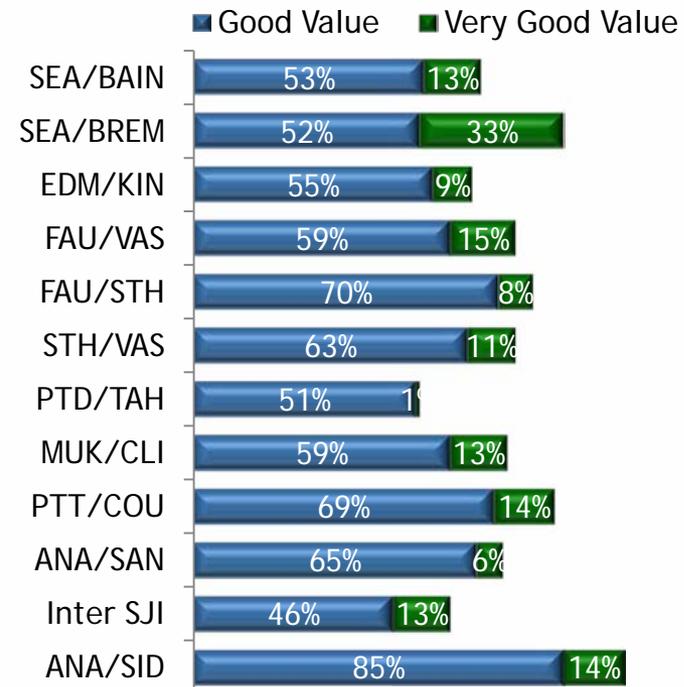
# Perceived Summer Value - By Volume

- ❖ When calculated based on volume, 71% of riders, a significantly lower percentage, feel that WSF is a good value during the Summer season.

Perceived Summer Value  
- By Volume



Perceived Value - By Route



N17 During the Summer season, do you feel that Washington State Ferries is...



# Tariff & Surcharge



# Key Findings

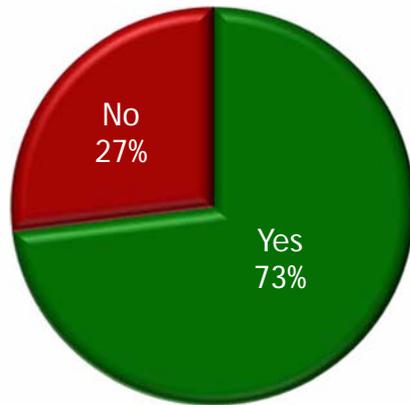
- ❖ 73% of riders support a higher price for a single trip and 64% agree that summer single-fare tickets should be priced higher than winter single-fare tickets.
  - Those who travel more often are more supportive of a higher price for a single trip.
  - In general, support is higher in districts more proximate to Puget Sound (i.e., people are more reliant on ferries for transportation).
- ❖ 52% of riders support charging an additional 10% over current summer single-fare prices during July and August as a way to manage wait times, while 33% oppose.
  - 44% of riders support a price increase of 5% during the peak summer period and a price decrease of 5% in non-peak seasons.
    - The greatest impact on rider behavior occurs at an increase of roughly 14%.
- ❖ 36% of all riders (Winter and Summer waves combined) are in support a fuel surcharge to recoup some of the higher than expected fuel costs; 51% are against.
  - Summer riders are significantly more likely to support the fuel surcharge (40% vs. 33% winter).
  - 37% of respondents support a fuel surcharge that is capped at 20% of the fare price, regardless of how much it covers the extra fuel costs; 46% prefer applying the surcharge across all fares (both vehicle and passenger) equally.
- ❖ One quarter of ferry riders support introducing higher fares for out-of-state ferry passengers.
  - As expected, significantly fewer summer riders support the higher fares for non-residents, which is likely due to the larger number out-of-state recreational travelers completing the survey.
  - Of those in support of higher fares for non-residents, riders propose that non-residents be charged an average of 21% more than residents for ferry travel.
  - Of those who originally supported higher fares for non-residents, 62% remain supportive after considering the extra time that may be needed to verify residency.



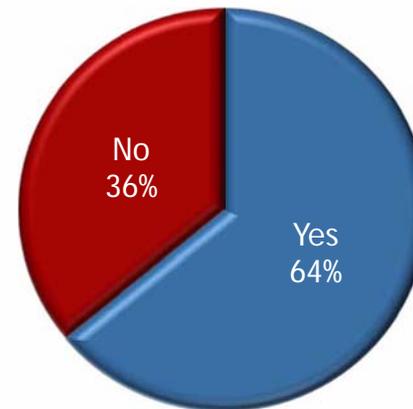
# Support for Higher Single-Fare Pricing

- ❖ Three in four (73%) riders support a higher price for a single trip fare versus a frequent rider or multi-ride fare.
  - Support for a higher price for a single trip fares is higher when weighted by volume (one ride/one vote) - 79% vs. 73%.
  - Support is higher among more-frequent riders (80%).
- ❖ In addition, two-thirds (64%) agree that summer season single-fare tickets should be priced higher than the same ticket during the winter season.

**% Agree Higher Price for Single-Fare Ticket**  
(n=4,260)



**% Agree Higher Price for Summer Single-Fare Ticket**  
(n=3,086)



- N18 As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider/multi-ride card holder, or not?
- N19 As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the Summer season than during the winter season?



# Single-Fare Pricing - By Route

- ❖ Support of a higher price for a single trip fare is highest among riders of the Anacortes/San Juan Islands, Point Defiance/Tahlequah, Fauntleroy/Vashon and Anacortes/Sidney routes.

Support for Higher Single-Fare Ticket	SEA/ BAIN n=1313	SEA/ BREM n=511	EDM/ KIN n=930	FAU/ VAS n=392	FAU/ SOU n=170	SOU/ VAS n=40	PTD/ TAH n=139	MUK/ CLI n=836	PTT/ COU n=151	ANA/ SJI n=515	INTR SJI n=40	ANA/ SID n=56
Yes	75%	69%	69%	77%	67%	74%	81%	74%	59%	81%	69%	77%
No	25%	31%	31%	23%	33%	26%	19%	26%	41%	19%	31%	23%

- ❖ Riders of the Mukilteo/Clinton, Anacortes/San Juan Islands and Inter San Juan Islands routes show the highest support of a higher single-fare ticket in the summer than in the winter.

Support for Higher Single-Fare Summer Ticket	SEA/ BAIN n=985	SEA/ BREM n=350	EDM/ KIN n=636	FAU/ VAS n=302	FAU/ SOU n=113	SOU/ VAS n=30*	PTD/ TAH n=113	MUK/ CLI n=610	PTT/ COU n=86	ANA/ SJI n=408	INTR SJI n=27*	ANA/ SID n=43
Yes	62%	59%	62%	63%	56%	61%	58%	73%	58%	70%	85%	58%
No	38%	41%	38%	37%	44%	39%	42%	27%	42%	30%	15%	42%

\* Caution: Small sample sizes

- N18 As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider/multi-ride card holder, or not?
- N19 As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the Summer season than during the winter season?



# Support for Higher Priced Single-Fare Ticket By Legislative District

- ❖ In general, support is higher in districts more proximate to Puget Sound.
  - Although support is high in District 42, the number of ferry riders there is low.
  - Because the information to pinpoint respondents' exact District (i.e., street address) is not available to us, there is some overlap between the Districts which may result in anomalies such as the low level of support in District 21 due to its overlap with Districts 1, 32, 38, and 44.

## Legislative Districts

Support Higher Priced Single-Fares	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Yes	63%	59%	75%	71%	63%	76%	55%	70%	70%	77%	78%	70%	74%
No	37%	41%	25%	29%	37%	24%	45%	30%	30%	23%	22%	30%	26%

Support Higher Priced Single-Fares	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	42 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	No ZIP n=279
Yes	74%	76%	69%	80%	62%	77%	76%	64%	70%	78%	69%	73%
No	26%	24%	31%	20%	38%	23%	24%	36%	30%	22%	31%	27%

N18 As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider/multi-ride card holder, or not?



# Support for Higher Priced Single-Fare Summer Ticket By Legislative District

- ❖ Of the Districts directly served by the ferries, only District 10 (Island County) shows a higher-than average level of support of higher-priced single-fare tickets in summer.

## Legislative Districts

Support Higher Summer Single-Fare	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Yes	58%	45%	72%	71%	57%	64%	55%	59%	58%	41%	64%	59%	59%
No	42%	55%	28%	29%	43%	36%	45%	41%	42%	59%	36%	41%	41%

Support Higher Summer Single-Fare	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	42 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Yes	64%	42%	57%	72%	72%	41%	64%	48%	64%	66%	70%	62%
No	36%	58%	43%	28%	28%	59%	36%	52%	36%	34%	30%	38%

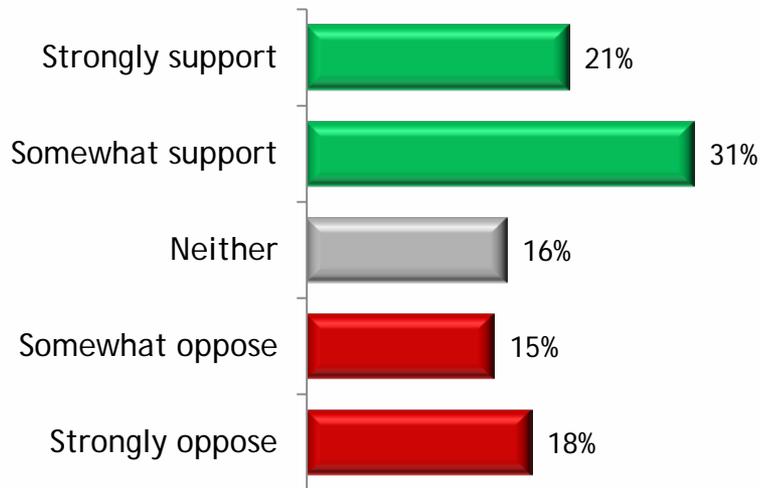
N19 As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the Summer season than during the winter season?



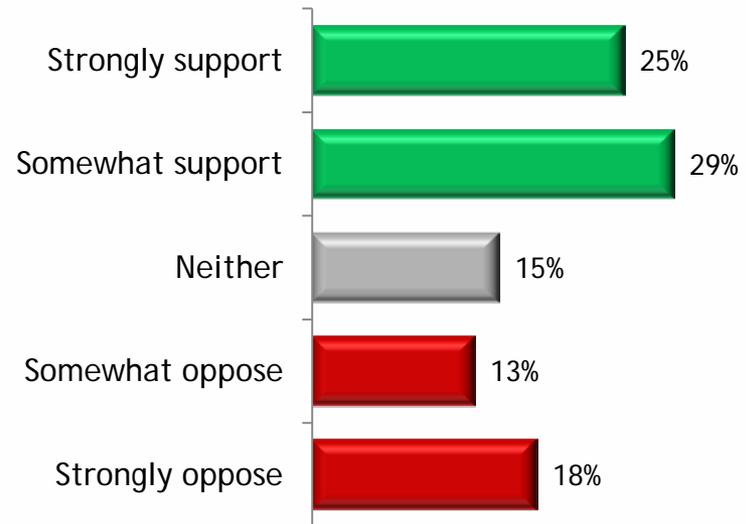
# July/August Single-Fare Increase

- ❖ Of those who believe that single-fare tickets for a single trip should be priced higher during the summer season than during the winter season, 52% support charging an additional 10% over current summer single-fare prices during July and August as a way to manage wait times.
  - Conversely, 33% oppose the price increase during the months of July and August.

**Support Higher Single-Fare Price  
July-August - By Rider**  
(n=1,974)



**Support Higher Single-Fare Price  
July-August - By Volume**



*N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current Summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?*



# July/August Single-Fare Increase - By Route

❖ With regards to support of a 10% increase in single-trip fares in July and August, there are no noteworthy significant differences among routes.

Support for Summer Surcharge	SEA/ BAIN n=609	SEA/ BREM n=206	EDM/ KIN n=390	FAU/ VAS n=188	FAU/ SOU n=63	SOU/ VAS n=18*	PTD/ TAH n=65	MUK/ CLI n=441	PTT/ COU n=50	ANA/ SJI n=284	INTR SJI n=23*	ANA/ SID n=25*
Support (net)	57%	54%	45%	52%	61%	36%	43%	51%	52%	47%	62%	64%
Strongly support	22%	20%	17%	16%	26%	21%	18%	22%	19%	23%	16%	29%
Somewhat support	35%	34%	28%	36%	36%	15%	24%	29%	34%	24%	46%	36%
Indifferent	15%	15%	14%	18%	8%	18%	31%	14%	15%	17%	11%	36%
Somewhat oppose	12%	20%	16%	17%	11%	21%	7%	15%	18%	17%	19%	0%
Strongly oppose	16%	12%	25%	13%	20%	25%	20%	20%	15%	19%	8%	0%
Oppose (net)	28%	32%	41%	30%	31%	46%	27%	35%	33%	36%	27%	0%

\* Caution: Small sample sizes

N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?



# Support for July/August Single-Fare Increase By Legislative District

- ❖ Charging an additional 10% for single-fare tickets during the summer months has only scattered areas of higher support.

## Legislative Districts

Support July/August Single-Fare Increase	1 n=53	5 n=26	10 n=320	11 n=56	21 n=37	23 n=614	24 n=75	26 n=126	32 n=56	33 n=9	34 n=219	35 n=194	36 n=106
Support (1 - 2)	54%	47%	51%	63%	43%	51%	54%	54%	57%	45%	44%	54%	56%
Oppose (rate 4 - 5)	36%	30%	34%	29%	48%	34%	37%	31%	33%	36%	34%	31%	32%

Support July/August Single-Fare Increase	37 n=54	38 n=15	39 n=24	40 n=159	41 n=38	42 n=10	43 n=150	44 n=21	45 n=45	46 n=100	48 n=51	Other n=1179
Support (1 - 2)	60%	25%	59%	46%	72%	59%	59%	53%	53%	64%	53%	53%
Oppose (rate 4 - 5)	29%	68%	31%	39%	24%	41%	26%	42%	30%	29%	36%	16%

*Legislative districts 27 and 47 have insufficient sample sizes for reporting.*

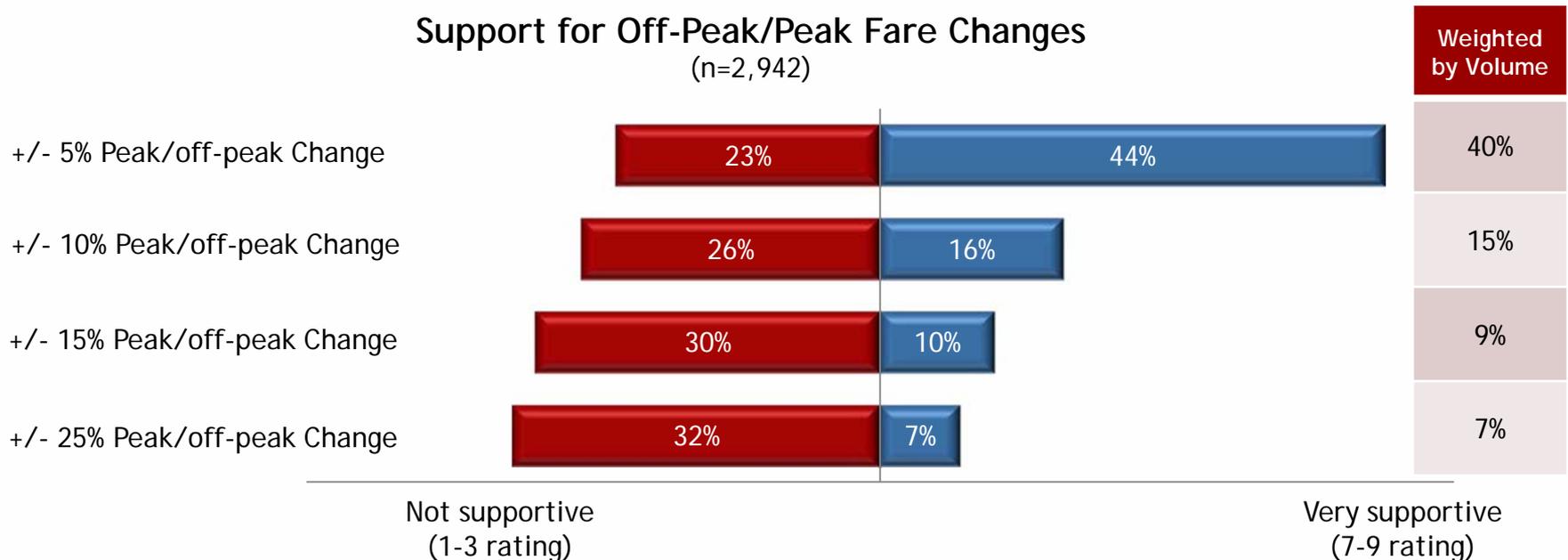
N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current Summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?



# Support for Seasonal Congestion Pricing Changes

- ❖ There is an inverse relationship between support of the peak/off-peak summer congestion pricing and the percentage of increase/decrease (e.g. the higher the percent change, the lower the support of the fare alternative).
- ❖ Support for congestion pricing is not significantly lower when weighted by volume.
  - No significant differences were found between riders of different routes regarding potential congestion pricing changes.

## Support for Off-Peak/Peak Fare Changes (n=2,942)



Q1 Please rate how supportive you would be of using this potential option to reduce peak Summer period vehicle demand.



# Support for Seasonal Congestion Pricing By Legislative District

❖ Several Districts have both higher-than-average levels of support *and* more consistent support across the four price levels tested.

## Legislative Districts

Very Supportive, Congestion Pricing*	1 n=63	5 n=51	10 n=443	11 n=53	21 n=48	23 n=1132	24 n=141	26 16108	32 n=36	33 n=11	34 n=274	35 n=248	36 n=78
+/-5% Peak/off-peak	54%	37%	42%	69%	45%	42%	45%	45%	57%	56%	38%	48%	58%
+/-10% Peak/off-peak	35%	14%	23%	43%	25%	23%	29%	22%	33%	35%	22%	27%	47%
+/-15% Peak/off-peak	25%	13%	17%	38%	18%	18%	9%	18%	30%	17%	17%	19%	37%
+/-25% Peak/off-peak	19%	35%	14%	33%	19%	14%	6%	13%	38%	-	9%	14%	34%

Very Supportive, Congestion Pricing*	37 n=34	38 n=9	39 n=13	40 n=119	41 n=22	42 n=104	43 n=104	44 n=16	45 n=30	46 n=56	48 n=26	Other n=34
+/-5% Peak/off-peak	54%	50%	58%	38%	62%	60%	56%	60%	56%	59%	49%	49%
+/-10% Peak/off-peak	43%	34%	28%	23%	38%	39%	41%	41%	34%	43%	38%	38%
+/-15% Peak/off-peak	40%	29%	21%	11%	19%	14%	37%	20%	30%	40%	31%	21%
+/-25% Peak/off-peak	41%	30%	24%	9%	12%	20%	35%	22%	29%	37%	37%	10%

\*Scenarios indicate price increases during the peak season, and decreases in the off-peak season

Q1 Please rate how supportive you would be of using this potential option to reduce peak Summer period vehicle demand.



# Impact of Peak Time Price Increases

- ❖ On average, a 1% increase in fares will reduce peak-period vehicle travel by 1.4%. There is no difference in the response by volume.

Support Off-Peak/Peak Fare Changes*	5% Change (n=2,713)	10% Change (n=2,713)	15% Change (n=2,713)	25% Change (n=2,713)
I wouldn't change anything	52%	46%	39%	32%
Fewer vehicle trips during peak times; more during off-peak times	27%	35%	42%	48%
About the same trips during peak times; walk on more often	5%	5%	4%	3%
More vehicle trips during peak times	1%	1%	1%	1%
No impact; I don't take vehicle trips during peak times	14%			
No impact; this is the only ferry trip of the summer	1%			

\*Scenarios indicate price increases during the peak season, and decreases in the off-peak season

Q2 How might this option impact your peak Summer period vehicle travel (during the heaviest congested travel times) on the ferry if it was enacted?





# Support for Fuel Surcharge By Legislative District

- ❖ Support for a fuel charge is generally higher in Districts less proximate to the Sound, with the exception of Districts 32 and 36.

## Legislative Districts

Fuel Surcharge Support - Summer	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Rate support 4 or 5	44%	48%	31%	59%	42%	25%	41%	32%	44%	43%	26%	31%	45%
Rate support 1 or 2	40%	31%	58%	29%	40%	65%	42%	58%	37%	36%	58%	58%	36%

Fuel Surcharge Support - Summer	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	42 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Rate support 4 or 5	53%	38%	46%	31%	58%	53%	48%	44%	55%	47%	56%	52%
Rate support 1 or 2	34%	45%	34%	56%	23%	31%	35%	39%	30%	36%	34%	28%

\*Based on a 5-point scale: 1=very supportive, 5=very against.

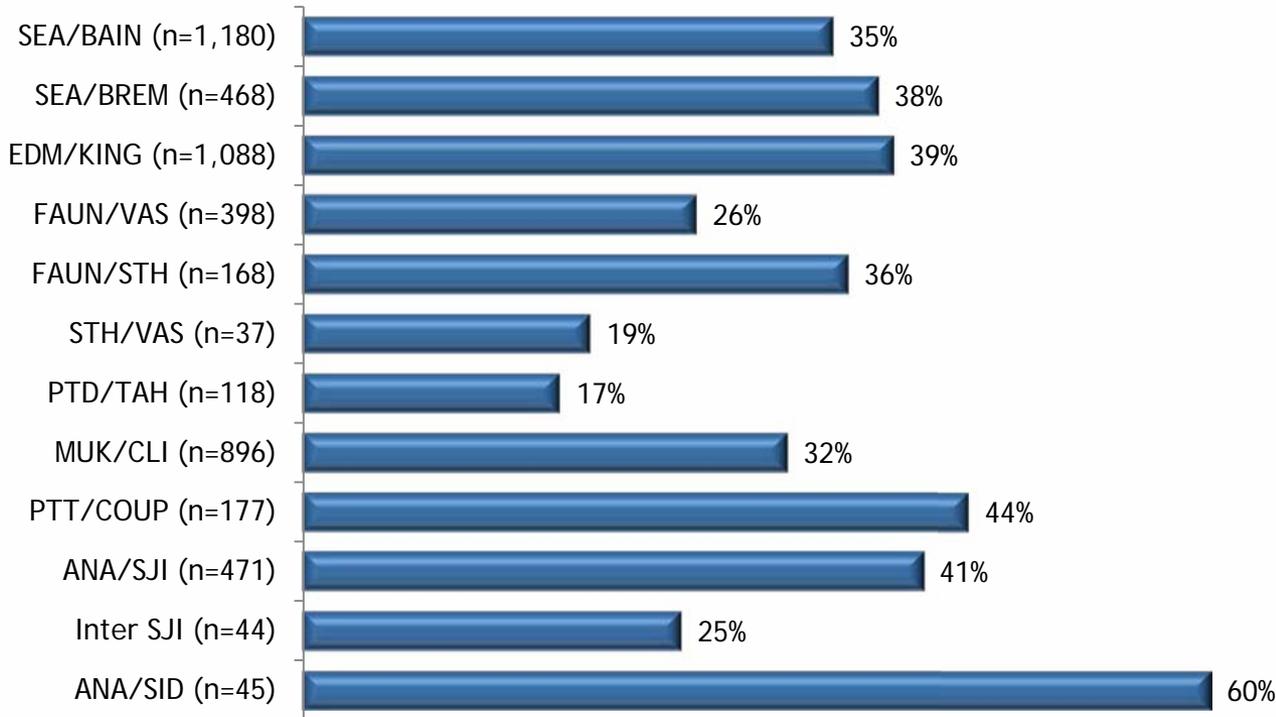
Q3 How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?



# Fuel Surcharge Support - By Route

- ❖ In total, support for the fuel surcharge is highest among riders of the Anacortes/Sidney, Port Townsend/Coupeville and Anacortes/San Juan Islands routes.

**Fuel Surcharge Support**  
(Top Box Ratings 4-5)



Avg. Rating (1-5 scale)	
Summer	Winter
2.6	2.6
2.6	2.6
2.7	2.6
2.6	2.3
2.6	2.4
2.2	2.0
2.1	2.0
2.6	2.5
3.0	3.0
2.8	2.5
2.5	2.3
3.3	n/a

Q3 How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs (1=Very against; 5=Very supportive)?



# Fuel Surcharge Maximum & Implementation

- ❖ 37% of respondents feel the fuel surcharge should be capped at 20% of the fare price, regardless of how much it covers the extra fuel costs.
  - Support of fuel surcharge caps are similar when looking at summer riders, weighted by volume.
- ❖ Opinions are varied regarding surcharge implementation; however, the option receiving the highest support (46%) is to apply it across all fares (both vehicle and passenger) equally.
- ❖ Applying the fuel surcharge to only single-trip fares is rated significantly higher when looking at summer riders, weighted by total number of trips (30% by volume vs. 22% by rider).

Fuel Surcharge Maximum	Total n=5,192*	Summer n=4,315	Winter n=4,173
Capped at 20% of the fare regardless of how much it covers extra fuel costs	37%	39%	44%
Capped at \$5 above base fare regardless of how much it covers extra fuel costs	21%	22%	20%
No maximum amount; the surcharge should cover the extra cost of fuel	11%	11%	11%
Don't know	29%	28%	25%

Fuel Surcharge Implementation	Total n=4,804*	Summer n=3,777	Winter n=3,891
Apply it across all fares (on both vehicle & passenger) equally	46%	46%	45%
Apply it to vehicles only (on both single and discounted multiple vehicle fares)	32%	32%	31%
Apply it to all single-trip fares (discounted multiple fares would not be charged the surcharge)	22%	22%	24%

\*Differs due to weighting

- Q4 Which of these do you feel would be the best way to set a maximum amount on the surcharge?  
 Q5 Which of these do you feel would be the most appropriate way for the surcharge to be applied?



# Fuel Surcharge Maximum - By Route

- ❖ In general, riders are more supportive of capping the fuel surcharge at 20% of the fare price.
  - Riders on the San Juan Islands and Anacortes routes are more likely to support a fuel surcharge that is capped at \$5 above the base fare.

Fuel Surcharge Maximum		SEA/ BAIN n=1021 n=1121	SEA/ BREM n=398 n=476	EDM/ KIN n=727 n=795	FAU/ VAS n=310 n=377	FAU/ SOU n=130 n=152	SOU/ VAS n=32 n=31	PTD/ TAH n=113 n=118	MUK/ CLI n=665 n=776	PTT/ COU n=122 n=85	ANA/ SJI n=398 n=210	INTR SJI n=32 n=29*	ANA/ SID n=44
Capped at 20% of the fare regardless of how much it covers extra fuel costs	Summer	42%	44%	35%	47%	48%	54%	41%	46%	23%	20%	29%	20%
	Winter	44%	46%	40%	48%	46%	38%	44%	51%	42%	18%	26%	n/a
Capped at \$5 above the base fare regardless of how much it covers extra fuel costs	Summer	20%	21%	22%	19%	15%	21%	20%	13%	23%	38%	26%	60%
	Winter	18%	19%	21%	20%	21%	18%	20%	13%	15%	48%	50%	n/a
No maximum amount; surcharge should cover the extra cost of fuel	Summer	10%	13%	11%	12%	11%	10%	11%	12%	15%	13%	14%	3%
	Winter	13%	11%	12%	9%	8%	14%	7%	11%	16%	12%	4%	n/a
Don't know	Summer	28%	22%	32%	22%	26%	15%	28%	30%	39%	29%	31%	17%
	Winter	26%	24%	27%	23%	24%	30%	29%	25%	27%	21%	20%	n/a

\* Caution: Small sample sizes

Q4 If a fuel surcharge were implemented and a cap was needed to limit how high it could go, which of these do you feel would be the best way to set a maximum amount on the surcharge?



# Fuel Surcharge Implementation - By Route

- ❖ Overall, both summer and winter riders agree most often that the surcharge should be **applied across all fares equally**.

Fuel Surcharge Implementation (of those responding)		SEA/ BAIN n=954 n=1051	SEA/ BREM n=380 n=446	EDM/ KIN n=667 n=735	FAU/ VAS n=290 n=350	FAU/ SOU n=120 n=140	SOU/ VAS n=32 n=27*	PTD/ TAH n=102 n=105	MUK/ CLI n=626 n=729	PTT/ COU n=110 n=78	ANA/ SJI n=368 n=201	INTR SJI n=24* n=29*	ANA/ SID n=46
Apply it across all fares (on both vehicle & passenger) equally	Summer	45%	41%	51%	41%	46%	53%	39%	43%	57%	48%	35%	29%
	Winter	45%	40%	47%	39%	54%	53%	48%	44%	51%	40%	34%	n/a
Apply it to vehicles only (on both single and discounted multiple vehicle fares)	Summer	34%	44%	32%	28%	31%	27%	28%	29%	33%	24%	35%	61%
	Winter	35%	43%	30%	29%	26%	18%	19%	27%	41%	21%	15%	n/a
Apply it to all single-trip fares (discounted multiple fares not charged the surcharge)	Summer	22%	15%	17%	31%	24%	19%	33%	29%	9%	28%	31%	10%
	Winter	19%	17%	23%	32%	20%	29%	33%	29%	8%	39%	51%	n/a

\* Caution: Small sample sizes

Q5 If a fuel surcharge were implemented and these were your three options, which of these do you feel would be the most appropriate way for the surcharge to be applied?



# Fuel Surcharge Maximum By Legislative District

- ❖ A cap of 20% of the fare has the highest support in Island County and the Districts West of the Sound.
- ❖ Support for a \$5-above-base is generally among Districts more distant from Puget Sound.

Fuel Surcharge Maximum - Summer	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Capped at 20% of the fare	25%	24%	46%	34%	29%	47%	36%	48%	27%	26%	45%	47%	30%
Capped at \$5 above base fare	32%	30%	14%	14%	25%	19%	21%	19%	15%	10%	19%	23%	20%
No maximum amount	18%	15%	10%	18%	18%	7%	13%	10%	23%	24%	10%	8%	16%
Don't know	25%	30%	30%	34%	28%	27%	31%	24%	35%	40%	26%	21%	34%

Fuel Surcharge Maximum - Summer	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	43 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Capped at 20% of the fare	32%	28%	30%	19%	27%	30%	35%	27%	23%	32%	25%	23%
Capped at \$5 above base fare	22%	34%	25%	43%	23%	28%	22%	33%	35%	19%	30%	24%
No maximum amount	14%	15%	18%	9%	14%	12%	13%	16%	22%	19%	17%	18%
Don't know	33%	23%	27%	30%	36%	30%	30%	24%	21%	30%	28%	34%

Q4 Which of these do you feel would be the best way to set a maximum amount on the surcharge?



# Fuel Surcharge Application By Legislative District

- ❖ Applying a surcharge equally to both vehicle and passenger fares has more support East of the Sound.
- ❖ Districts West of the Sound and Island County show more support for applying the surcharge to only single-fare trips.

Fuel Surcharge Application - Summer	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Equally to vehicle & passenger fares	57%	65%	39%	45%	59%	36%	49%	40%	58%	56%	36%	41%	52%
Apply to vehicles only	29%	15%	26%	36%	22%	34%	34%	37%	20%	27%	28%	36%	27%
Apply to all single-trip fares	7%	14%	29%	13%	11%	22%	12%	18%	13%	13%	29%	17%	11%

Fuel Surcharge Application - Summer	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	43 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Equally to vehicle & passenger fares	44%	59%	59%	38%	52%	55%	41%	54%	58%	48%	52%	46%
Apply to vehicles only	32%	30%	26%	20%	30%	26%	36%	34%	21%	31%	24%	30%
Apply to all single-trip fares	17%	6%	9%	35%	11%	9%	14%	6%	16%	11%	16%	9%

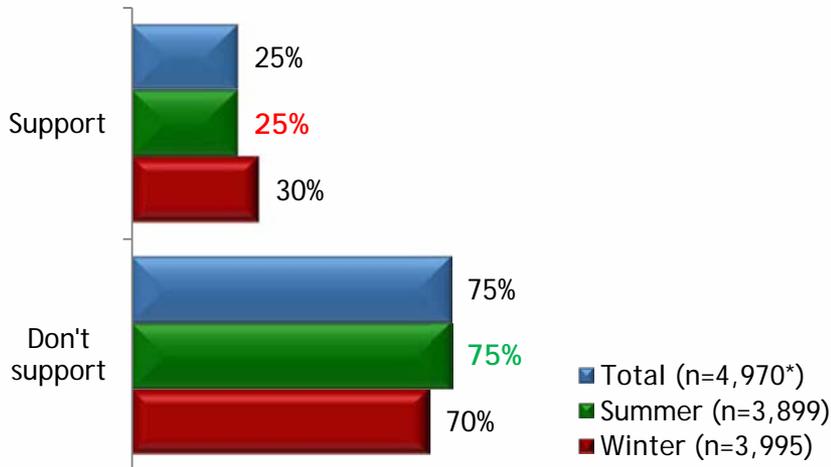
Q5 Which of these do you feel would be the most appropriate way for the surcharge to be applied?



# Higher Fares for Non-Residents

- ❖ One quarter of riders support introducing higher fares for out-of-state ferry passengers.
  - Significantly fewer summer riders support the higher fares for non-residents, which is likely due to the larger number out-of-state recreational travelers.
- ❖ On average, of those in support of higher fares for non-residents, riders propose that non-residents be charged 21% more than residents for ferry travel.
- ❖ Of those who originally supported higher fares for non-residents, three fifths (62%) remain supportive after considering the extra time that may be needed to verify residency.

## Higher Fares for Non-Residents



## Support Given Extra Time Needed



Only ratings of support (4-5) or lack of support (1-2) are shown.  
Ratings of 3 or don't know are not shown.

Q6 How you would feel about introducing higher fares for out-of-state ferry passengers?

\*Differs due to weighting

Q7 What percent more should non-residents be charged than residents for ferry travel?

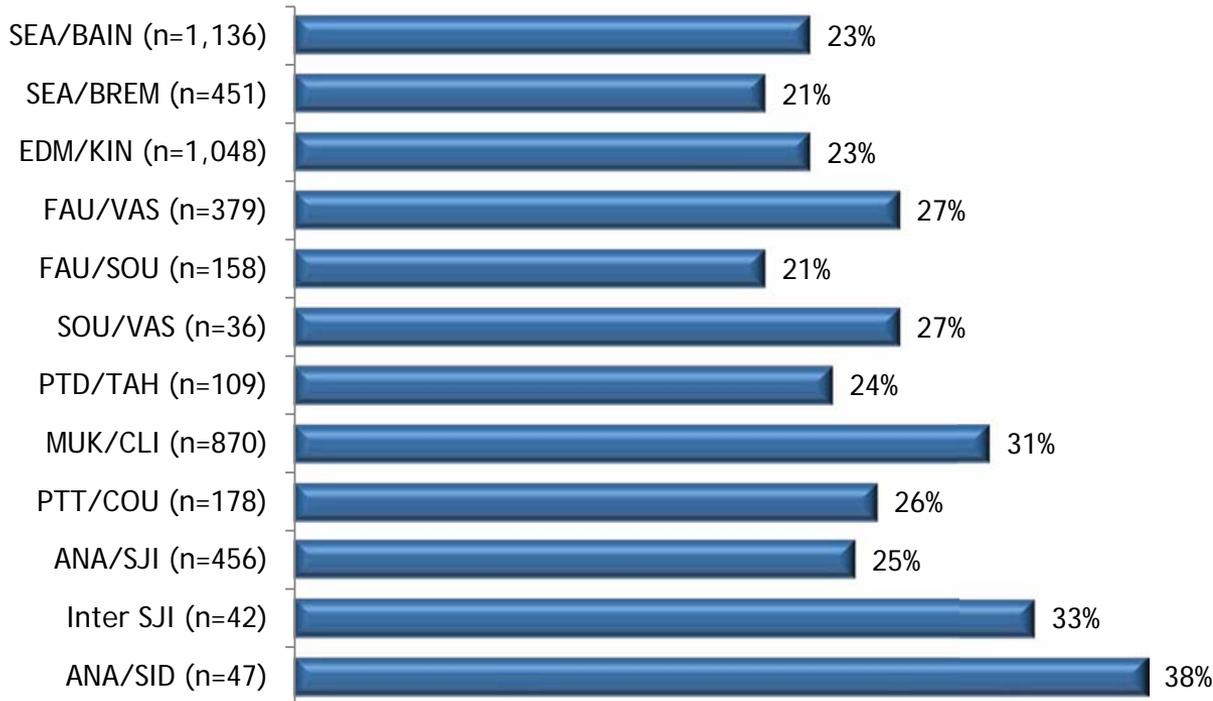
Q8 How supportive would you be of this type of program given that extra time could be needed to verify residency?



# Higher Fares for Non-Residents - By Route

- ❖ Riders of the Anacortes/Sidney route (38%) are most likely to be in support of higher rates for out-of-state residents.
  - As expected, the support for higher fares for non-residents decreases across the majority of routes during the summer survey period.

## Support of Higher Fares for Non-Residents (Total)



% Support	
Summer Riders	Winter Riders
24%	26%
21%	24%
22%	28%
28%	36%
25%	24%
20%	29%
21%	29%
29%	37%
23%	34%
26%	40%
23%	63%
38%	n/a

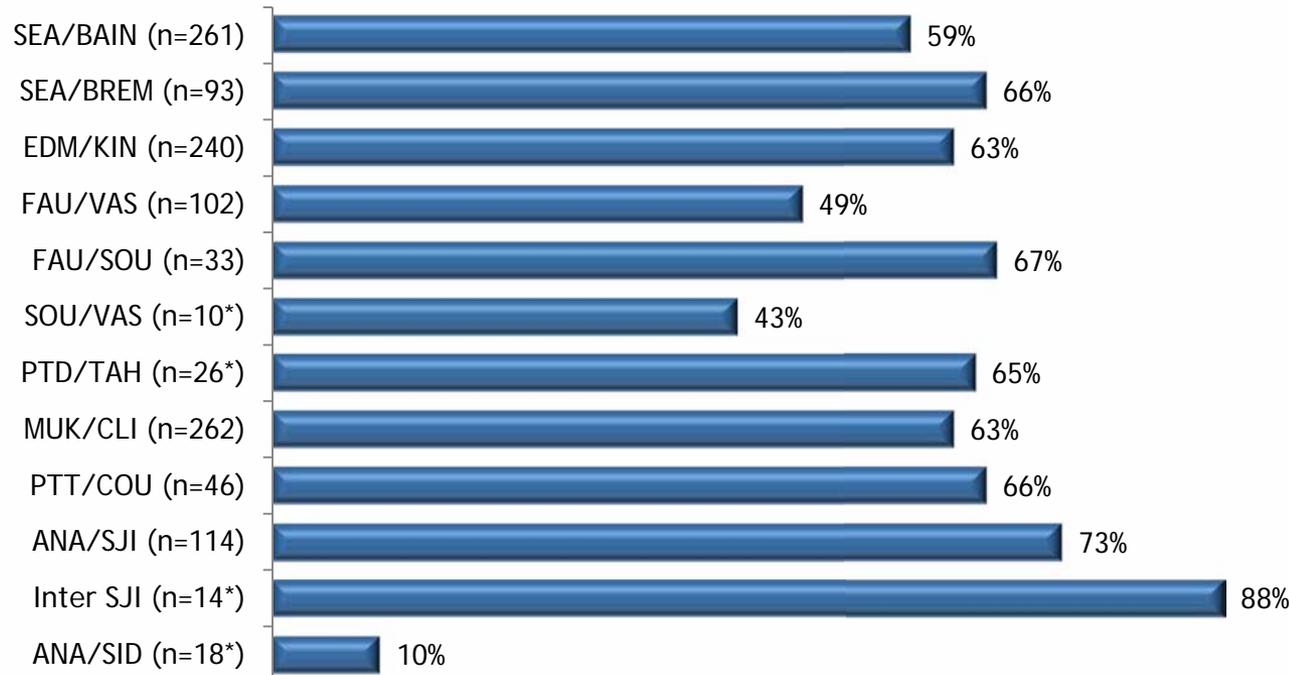
Q6 Based on this information, which of these statements best describes how you would feel about introducing higher fares for out-of-state ferry passengers?



# Higher Fares for Non-Residents - By Route

- ❖ Of those who initially support the higher fares for non-residents, over 40% remain supportive given the extra time needed to verify residency, with the exception of Anacortes/Sidney riders.

## Higher Non-Resident Fare Support Given Extra Time Needed (Total) (Top Box Ratings 4-5)



% Support (Top Box 4-5)	
Summer Riders*	Winter Riders
55%	63%
62%	68%
65%	57%
56%	50%
68%	59%
39%	45%
67%	64%
64%	61%
71%	60%
73%	72%
76%	88%
17%	n/a

\* Caution: Small sample sizes

Q8 Introducing higher fares for out-of-state ferry passengers could add to wait times at the toll booth to verify each rider's place of residence. How supportive would you be of this type of program given that extra time could be needed to verify residency?



# Reservation System



# Key Findings

- ❖ Support for the implementation of a reservation system is highly divided, with 37% strongly opposed and 21% strongly in favor of the program.
  - Support for the reservation system is highest among riders of the Port Townsend/Coupeville and Anacortes/San Juan Islands routes.
  - The reservation system has the most opposition from riders on the Point Defiance/Tahlequah, Fautleroy/Vashon and Mukilteo/Clinton routes.
- ❖ Respondents most commonly indicated that if the reservation system were in place, they would either rarely (29%) or never (13%) use the program.
  - The routes that tend to mention the intent to use the system every time more often include Edmonds/Kingston, Port Townsend/Coupeville and Anacortes/San Juan Islands.
  - Riders of the Seattle/Bremerton and Southworth/Vashon routes tend to mention that they would never use the reservation system more frequently than other riders.
- ❖ The most important feature of the possible system is enhanced information/signage regarding current ferry status available before arriving to the terminal.
  - The least important features include reservations on non-commuter sailings available six months in advance and a maximum of 90% of space available for reservations during peak periods.

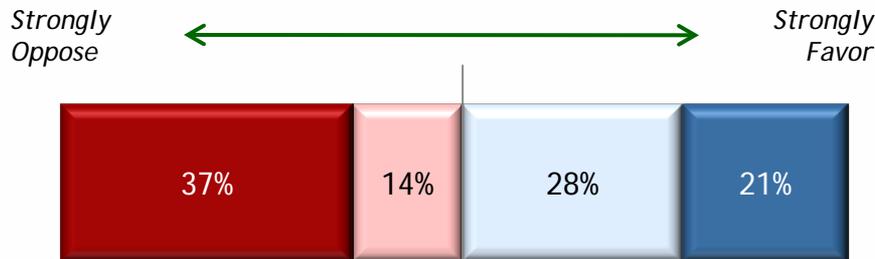


# Reservation Program - Support & Use

- ❖ Riders are split in their support for a reservation system, with 49% in favor and 51% opposed to the implementation of the program.
  - Reservation system support decreases when weighted by volume (44% by volume vs. 49% by rider).
- ❖ When asked how often they would use the reservation system if it were in place, the top mentioned response was rarely (a few times per year or for recreational trips only) by riders (29%) and by volume (25%).
  - 22% of riders report they would most likely take advantage of the reservation system every time they drive onto the ferry (27% among more-frequent riders).

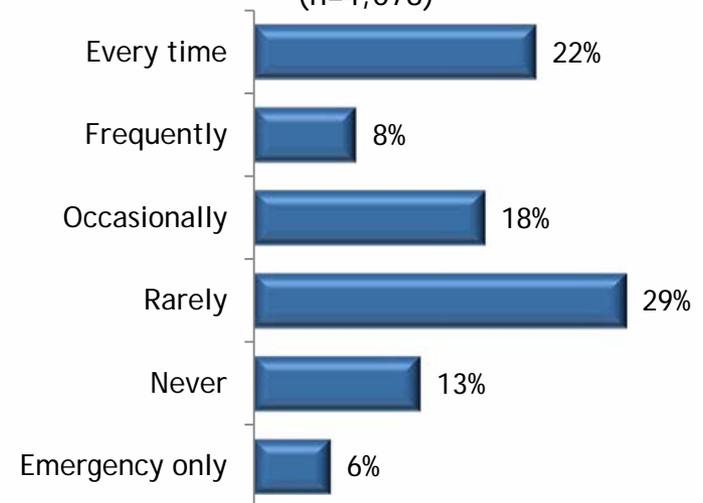
## Reservation Program Support

(n=3,981)



## Expected Use of Reservation System

(n=4,078)



RS1 Based on the information above, would you favor or oppose WSF offering the above vehicle reservation program?

RS2 If the vehicle reservation system described was offered, how often would you take advantage of the system to reserve a guaranteed space on the ferry for you vehicle at a specific boarding time?



# Reservation Program Support - By Route

- ❖ Riders on the Port Townsend/Coupeville and Anacortes/San Juan Islands routes tend to be significantly more supportive of the reservation program than those on other routes.
- ❖ Those tending to oppose the program significantly more than others are on the Port Defiance/Tahlequah, Fautleroy/Vashon and Mukilteo/Clinton routes.
  - The decrease in support ,when weighted by volume, is driven primarily by decreases in the Port Townsend/Coupeville, Seattle/Bremerton and Port Defiance/Tahlequah routes (8%, 6% and 6% decreases respectively)

Reservation Support	SEA/ BAIN n=1234	SEA/ BREM n=478	EDM/ KIN n=863	FAU/ VAS n=351	FAU/ SOU n=155	SOU/ VAS n=36	PTD/ TAH n=124	MUK/ CLI n=797	PTT/ COU n=147	ANA/ SJI n=484	INTR SJI n=39	ANA/ SID n=54
Favor	52%	53%	51%	22%	50%	44%	24%	37%	67%	72%	76%	57%
Strongly favor	19%	21%	24%	7%	16%	8%	8%	14%	31%	43%	41%	37%
Somewhat favor	33%	32%	27%	15%	34%	37%	16%	23%	36%	29%	34%	20%
Somewhat oppose	16%	16%	13%	17%	15%	16%	14%	12%	11%	11%	10%	7%
Strongly oppose	32%	31%	35%	62%	35%	40%	62%	51%	22%	17%	14%	37%
Oppose	48%	47%	49%	78%	50%	56%	76%	63%	33%	28%	24%	43%

RS1 Based on the information above, would you favor or oppose WSF offering the above vehicle reservation program?



# Reservation Program Use - By Route

- ❖ Riders indicate they would “rarely” or “occasionally (1-2 times per month)” take advantage of the reservation program.
  - Riders on the Port Townsend/Coupeville and Anacortes/San Juan Islands routes (41%) tend to be significantly more likely to utilize the reservation system every time they drive onto the ferry.
  - 34% of Southworth/Vashon riders say they would never use the reservation program if it was implemented.

Expected Reservation Usage	SEA/ BAIN n=1260	SEA/ BREM n=472	EDM/ KIN n=907	FAU/ VAS n=366	FAU/ SOU n=162	SOU/ VAS n=37	PTD/ TAH n=124	MUK/ CLI n=799	PTT/ COU n=150	ANA/ SJI n=501	INTR SJI n=37	ANA/ SID n=58
Every time	16%	21%	26%	11%	22%	6%	11%	21%	41%	41%	39%	16%
Frequently (1-2 times per week)	8%	7%	8%	12%	12%	5%	4%	12%	5%	7%	3%	0%
Occasionally (1-2 times per month)	23%	11%	14%	17%	12%	13%	26%	20%	19%	17%	19%	16%
Rarely (few times per year/recreational trips)	32%	35%	30%	29%	36%	21%	20%	23%	23%	22%	29%	47%
Never	13%	21%	13%	14%	11%	34%	19%	12%	5%	4%	5%	13%
Only in an emergency	6%	4%	6%	10%	5%	14%	14%	7%	3%	5%	<1%	9%
Do not support reservation system	1%	1%	1%	5%	<1%	3%	0%	3%	1%	1%	0%	0%
Depends on route	<1%	0%	<1%	1%	<1%	0%	5%	1%	1%	1%	0%	0%
Other	1%	<1%	1%	<1%	<1%	3%	2%	2%	4%	2%	3%	0%

RS2 If the vehicle reservation system described was offered, how often would you take advantage of the system to reserve a guaranteed space on the ferry for you vehicle at a specific boarding time?



# Reservation System Support By Legislative District

❖ Districts 10 and 34 are the only areas with particularly low levels of support for a reservation program.

Reservation System Support*	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Rate support 3 or 4	60%	64%	37%	62%	56%	46%	57%	48%	61%	62%	25%	46%	61%
Rate support 1 or 2	40%	36%	63%	38%	44%	54%	43%	52%	39%	38%	75%	54%	39%

Reservation System Support*	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	43 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Rate support 3 or 4	62%	66%	70%	68%	71%	81%	59%	59%	57%	59%	62%	69%
Rate support 1 or 2	38%	34%	30%	32%	29%	19%	41%	41%	43%	41%	38%	31%

\*Based on a 4-point scale: 1=strongly disagree, 4= strongly agree.

RS1 Based on the information above, would you favor or oppose WSF offering the above vehicle reservation program?



# Expected Reservation System Use By Legislative District

Reservation System Support	1 n=147	5 n=102	10 n=598	11 n=117	21 n=107	23 n=1275	24 n=253	26 n=308	32 n=139	33 n=30	34 n=445	35 n=480	36 n=245
Every time	28%	29%	24%	27%	26%	15%	30%	17%	28%	28%	14%	18%	23%
Frequently	6%	6%	13%	4%	7%	9%	8%	8%	6%	-	11%	7%	6%
Occasionally	16%	13%	20%	11%	18%	21%	19%	11%	17%	13%	20%	10%	17%
Rarely	29%	37%	18%	47%	29%	33%	23%	39%	34%	38%	26%	38%	41%
Never	16%	9%	12%	9%	14%	13%	9%	18%	12%	18%	15%	18%	8%
Emergency only	4%	6%	7%	1%	4%	6%	9%	5%	2%	3%	10%	6%	4%

Reservation System Support	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	43 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Every time	28%	30%	35%	41%	26%	41%	23%	25%	27%	21%	30%	27%
Frequently	8%	4%	9%	8%	4%	4%	7%	5%	9%	7%	6%	5%
Occasionally	11%	16%	16%	23%	24%	10%	16%	19%	12%	16%	20%	8%
Rarely	34%	34%	29%	14%	29%	33%	38%	31%	32%	41%	20%	38%
Never	15%	8%	8%	5%	13%	4%	10%	14%	12%	12%	15%	14%
Emergency only	4%	5%	2%	6%	3%	7%	5%	4%	7%	4%	7%	6%

RS2 If the vehicle reservation system described was offered, how often would you take advantage of the system to reserve a guaranteed space on the ferry for you vehicle at a specific boarding time?



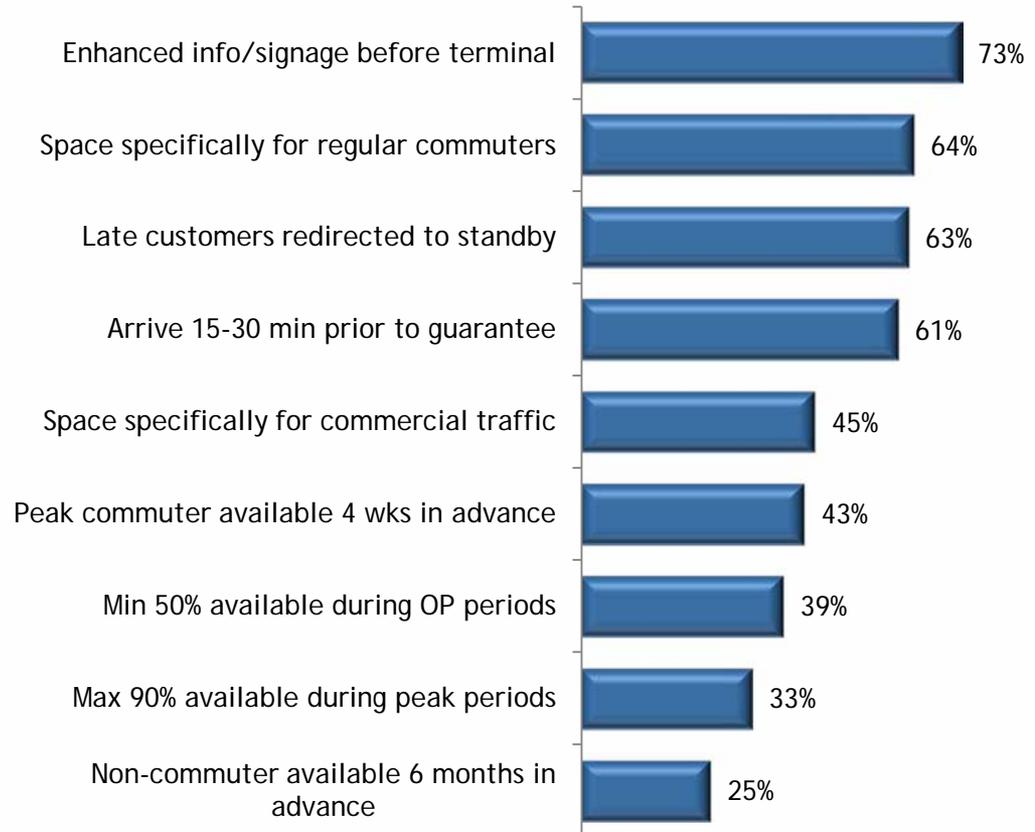
# Reservation Feature Importance

❖ Riders feel that enhanced information/signage being available before arriving at the terminal (73%) is the most important feature of the proposed reservation system.

- Riders of the Anacortes/San Juan Islands route tend to rate each feature significantly higher than riders of other routes.

❖ The least popular features of the program include non-commuter sailings available for reservation 6 months in advance (25%) and a maximum of 90% of capacity available for reservation during peak travel periods (33%).

% Rated "Important" (rated 4-5)  
(n=3,839)



RS3 For each item, please rate how important it is that that feature is included.



# Reservation Feature Importance - By Route

Top Box Importance 4 or 5 Ratings	SEA/ BAIN n=1191	SEA/ BREM n=472	EDM/ KIN n=855	FAU/ VAS n=326	FAU/ SOU n=158	SOU/ VAS n=34	PTD/ TAH n=113	MUK/ CLI n=749	PTT/ COU n=144	ANA/ SJI n=485	INTR SJI n=36	ANA/ SID n=45
Enhance info/signage before terminal	73%	74%	70%	77%	79%	73%	57%	71%	70%	76%	64%	96%
Some space specifically for regular commuters	62%	67%	60%	71%	72%	80%	55%	68%	54%	68%	38%	42%
Customers arriving late lose res; redirected to standby	60%	60%	63%	59%	62%	65%	56%	61%	65%	74%	83%	73%
Customers arrive 15-30 minutes early to guarantee res.	60%	60%	62%	52%	56%	52%	48%	56%	68%	81%	87%	77%
Some space specifically for commercial traffic	43%	44%	44%	43%	35%	64%	47%	44%	42%	56%	71%	72%
Peak commuter sailings avail. 4 weeks in advance	42%	43%	41%	32%	39%	51%	29%	46%	50%	52%	23%	23%
Min. 50% available during off-peak periods	37%	35%	41%	30%	46%	41%	18%	39%	46%	51%	57%	47%
Max. 90% available during peak periods	30%	33%	35%	27%	39%	34%	13%	32%	36%	44%	49%	20%
Non-commuter sailings avail. 6 months in advance	25%	28%	24%	15%	22%	26%	15%	23%	29%	33%	33%	33%

\* Caution: Small sample sizes

RS3 For each item, please rate how important it is that that feature is included.



# Ferry Services & Amenities



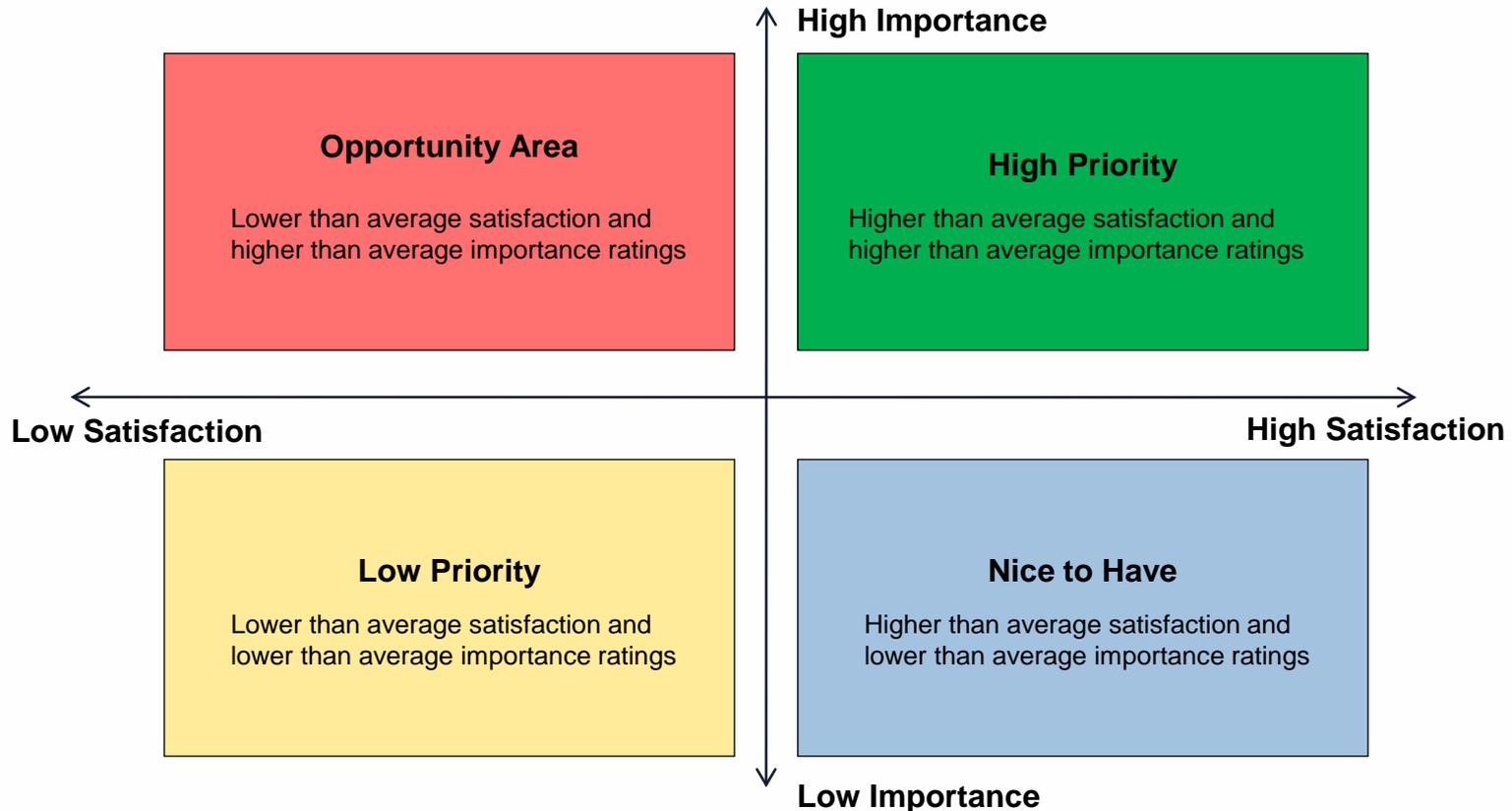
# Key Findings

- ❖ Of the eight tested, cleanliness of vessels and minimal arrival time prior to departure are the highest rated ferry services based on importance.
  - During the summer months, satisfaction with cleanliness of vessels increased; however, satisfaction with minimal arrival time prior to departure decreased greatly, thus remaining the area with the greatest opportunity to improve.
- ❖ 23% of riders feel that the loading and unloading process could be done better or more efficiently, primarily on the Seattle/Bainbridge (39%) and Edmonds/Kingston (27%) routes.
  - The top suggestions for improving the efficiency of the loading and unloading process are “training employees/improve customer service” (24%) and “better dock and street level traffic control” (18%).
- ❖ Usage of all ferry services and amenities has decreased in the summer months.
  - 63% of ferry riders use the galley service, 45% use the information center, and 22% use the vending machines.
  - 23% of ferry riders do not use any of the services or amenities offered.
  - Of those who provided suggestions for additional on-board services and amenities, access to free/cheaper WiFi (16%) and better quality food options (15%) are the most frequently mentioned.
  - Panel members are significantly more likely than the general public to use the galley service and vending machines, while non-panel members are more likely to utilize the information center.
- ❖ The majority (71%) of ferry riders use the WSF website to obtain information about the ferries.
  - With the exception of family/friends and the printed schedule, summer riders are significantly less likely than winter riders to use each of the information sources regarding the ferry system.
  - 38% of riders would use highway advisory radio for WSF information, if it were available.



# Gap Analysis

- ❖ The following slide presents a quadrant chart outlining the relative importance of each ferry feature and the relative satisfaction of each feature.
- ❖ Features considered highly important, but with low satisfaction, indicate opportunity areas for the WSF. Increasing awareness of these important features may help promote more positive impressions of the ferry system, as well as boost overall satisfaction.



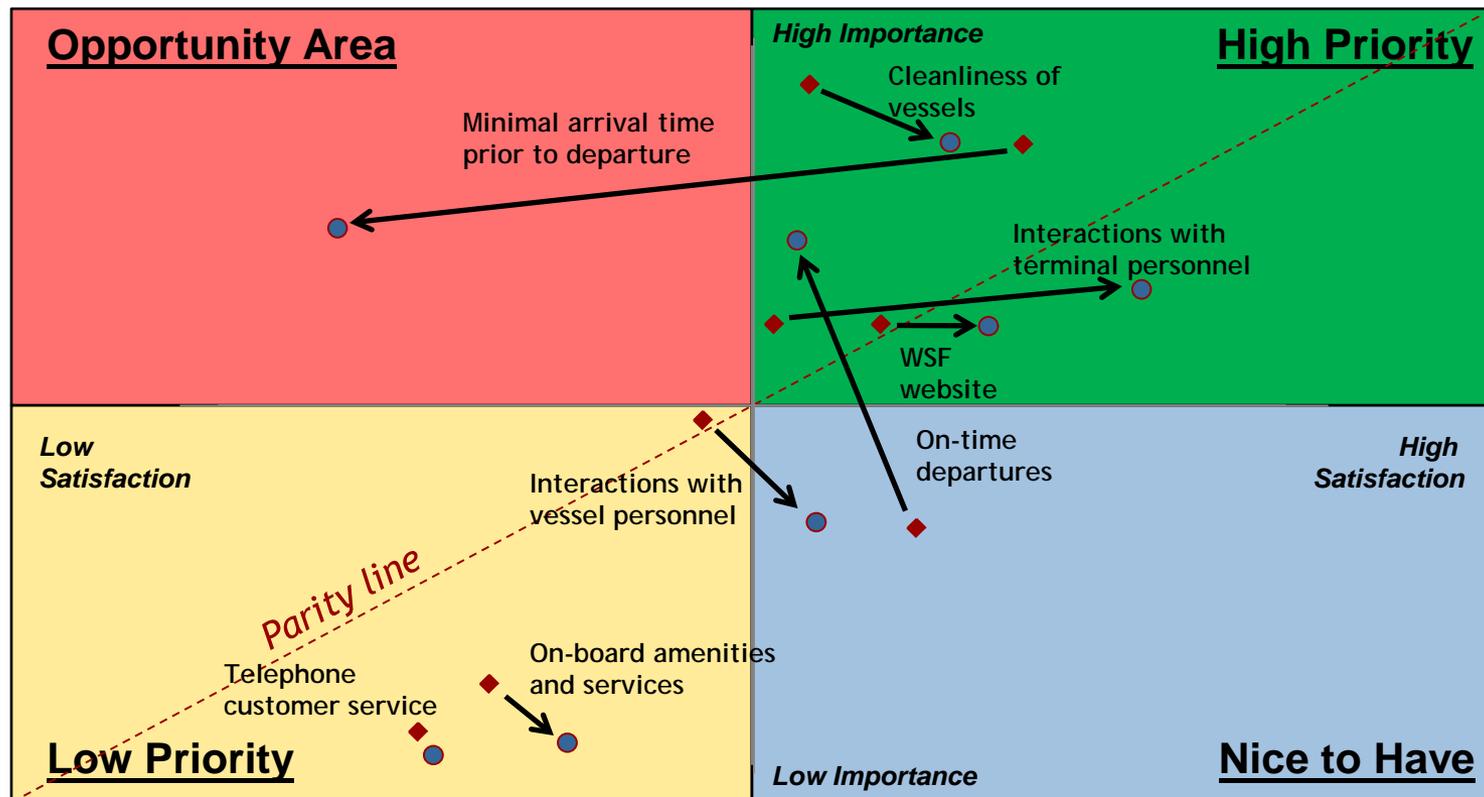


# Gap Analysis

- ❖ The factor rated highest in importance, **cleanliness of vessels**, received higher satisfaction ratings in the summer in comparison to winter findings. However, satisfaction with **minimal arrival time prior to departure** decreased greatly, thus remaining the area with the greatest opportunity to improve.

## Satisfaction vs. Importance Ratings

● = Summer    ◆ = Winter



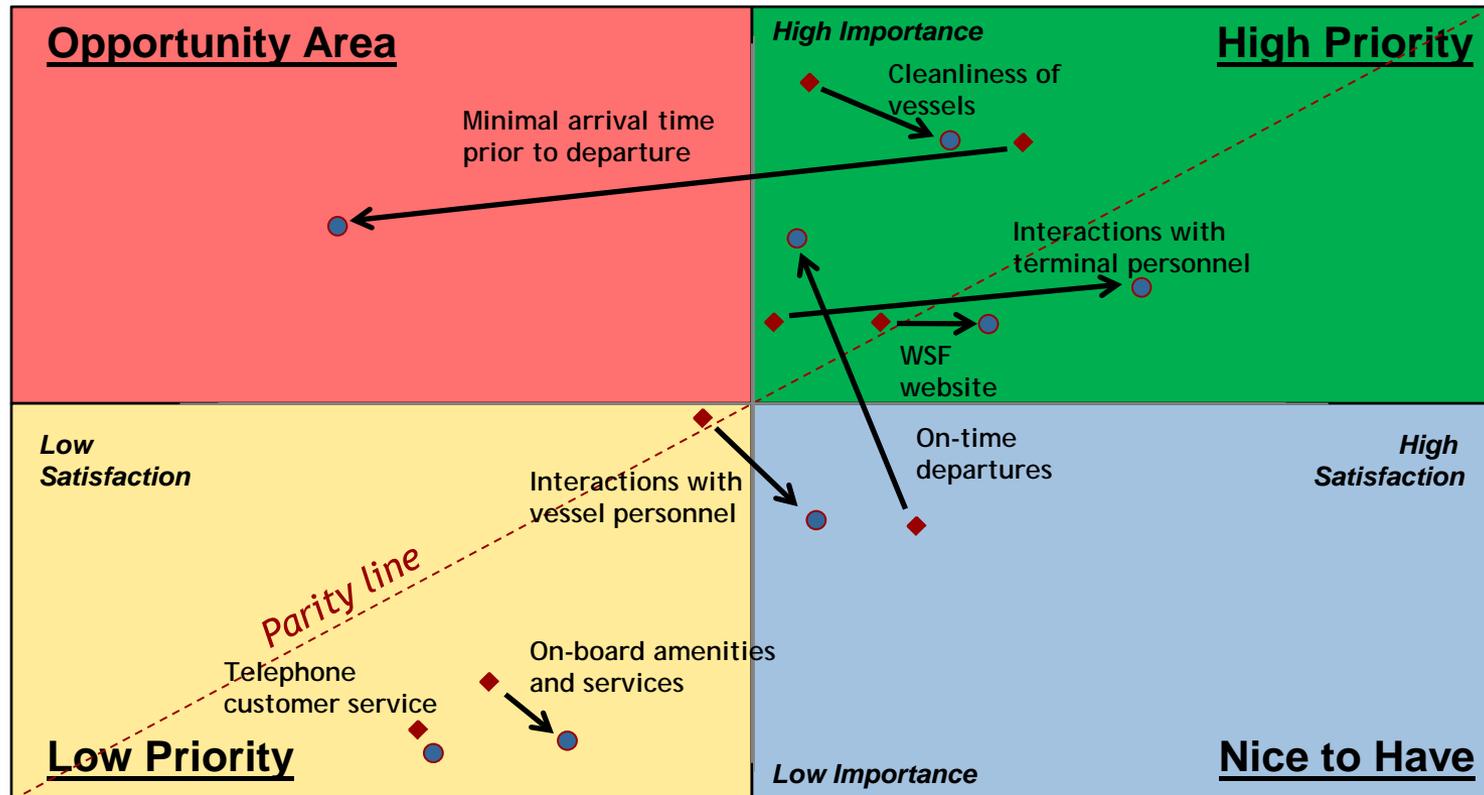


# Gap Analysis (cont.)

- ❖ **On-time departures** increased significantly in terms of importance, and is rated the third most important feature. However, it has received slightly lower scores for satisfaction.
- ❖ WSF performs well in terms of **interactions with terminal personnel**, as the scores have increased greatly compared to the winter wave.

## Satisfaction vs. Importance Ratings

● = Summer    ◆ = Winter





# Ferry Feature Importance - By Route

Top Box Importance 4 & 5 Ratings		SEA/ BAIN n=1045 n=1084	SEA/ BREM n=400 n=458	EDM/ KIN n=735 n=768	FAU/ VAS n=320 n=376	FAU/ SOU n=133 n=151	SOU/ VAS n=31 n=31	PTD/ TAH n=113 n=118	MUK/ CLI n=663 n=757	PTT/ COU n=121 n=85	ANA/ SJI n=410 n=201	INTR SJI n=32 n=29*	ANA/ SID n=41
Cleanliness of the vessels	Summer	84%	91%	86%	77%	84%	84%	71%	80%	85%	87%	96%	94%
	Winter	88%	90%	87%	81%	86%	79%	84%	85%	83%	89%	78%	n/a
Minimal arrival time prior to departure	Summer	74%	70%	78%	77%	78%	67%	79%	79%	72%	84%	82%	79%
	Winter	83%	77%	79%	85%	85%	80%	83%	85%	77%	87%	90%	n/a
WSF website	Summer	63%	73%	71%	60%	69%	62%	68%	68%	85%	81%	60%	84%
	Winter	63%	73%	66%	67%	71%	66%	79%	65%	90%	74%	68%	n/a
Interactions with terminal personnel	Summer*	55%	100%	74%	79%	88%	82%	67%	67%	74%	79%	91%	91%
	Winter	61%	63%	65%	76%	75%	79%	69%	70%	74%	68%	71%	n/a
Interactions with vessel personnel	Summer	42%	54%	58%	59%	62%	82%	66%	52%	58%	61%	73%	39%
	Winter	57%	63%	57%	63%	62%	60%	65%	57%	60%	66%	74%	n/a
On-time departures	Summer	78%	81%	74%	70%	84%	86%	73%	72%	76%	81%	78%	76%
	Winter	51%	67%	52%	40%	44%	54%	51%	47%	55%	39%	22%	n/a
On-board amenities and services	Summer	39%	47%	38%	24%	36%	26%	14%	27%	40%	40%	30%	36%
	Winter	44%	45%	38%	26%	42%	14%	19%	28%	44%	36%	23%	n/a
Telephone customer service	Summer	26%	36%	34%	30%	27%	30%	27%	35%	52%	45%	33%	62%
	Winter	30%	39%	33%	34%	34%	23%	40%	34%	43%	30%	47%	n/a

Q16 Please rate how important each of the following items are to you during the summer period.

\* Caution: Small sample sizes



# Ferry Feature Satisfaction - By Route

Top Box Satisfaction 4 & 5 Ratings		SEA/ BAIN n=1045 n=1084	SEA/ BREM n=400 n=458	EDM/ KIN n=735 n=768	FAU/ VAS n=320 n=376	FAU/ SOU n=133 n=151	SOU/ VAS n=31 n=31	PTD/ TAH n=113 n=118	MUK/ CLI n=663 n=757	PTT/ COU n=121 n=85	ANA/ SJI n=410 n=201	INTR SJI n=32 n=29*	ANA/ SID n=41
Minimal arrival time prior to departure	Summer	26%	38%	30%	25%	33%	37%	32%	23%	42%	22%	10%	14%
	Winter	79%	83%	77%	71%	83%	85%	75%	74%	74%	70%	73%	n/a
On-time departures	Summer	46%	54%	53%	49%	42%	57%	54%	67%	69%	43%	22%	68%
	Winter	74%	71%	63%	62%	63%	64%	66%	87%	81%	58%	64%	n/a
WSF website	Summer	57%	60%	65%	54%	57%	64%	60%	64%	76%	72%	59%	52%
	Winter	68%	71%	67%	64%	65%	82%	70%	70%	78%	75%	67%	n/a
Interactions with terminal personnel	Summer*	65%	53%	71%	79%	61%	100%	100%	71%	69%	67%	90%	84%
	Winter	60%	56%	66%	54%	61%	65%	64%	72%	76%	65%	70%	n/a
Cleanliness of the vessels	Summer	60%	39%	61%	68%	65%	73%	77%	63%	75%	55%	56%	71%
	Winter	64%	47%	69%	76%	67%	80%	80%	68%	81%	52%	57%	n/a
Interactions with vessel personnel	Summer	50%	42%	55%	55%	50%	66%	63%	55%	60%	56%	55%	36%
	Winter	62%	57%	61%	49%	53%	49%	56%	59%	69%	58%	67%	n/a
On-board amenities and services	Summer	40%	31%	43%	41%	40%	52%	36%	45%	38%	34%	19%	43%
	Winter	44%	40%	50%	54%	49%	58%	50%	56%	40%	24%	29%	n/a
Telephone customer service	Summer	34%	25%	36%	22%	22%	32%	32%	29%	49%	37%	58%	55%
	Winter	44%	41%	45%	34%	33%	37%	44%	44%	59%	39%	44%	n/a

Q16 Please rate how satisfied you currently are with each during the summer period.

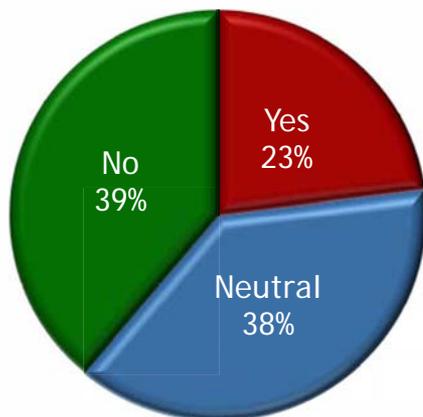
\* Caution: Small sample sizes



# Loading/Unloading Satisfaction

- ❖ 23% of riders feel that the loading and unloading process could be done better or more efficiently.
  - The top mentioned suggestions for improving the efficiency of the loading and unloading process are to “train employees/improve customer service” (24%) and “better dock and street level traffic control” (18%) among those who feel the process could be improved.

## Have Problems with Loading/Unloading (n=4,169)



## Suggested Loading/Unloading Improvements (n=935)



N22 Do you believe that the loading and unloading process could be done better or more efficiently?  
N23 What could they have done to make it better or more efficient?



# Loading/Unloading Satisfaction - By Route

- ❖ Riders of the Edmonds/Kingston, Port Townsend/Coupeville and Mukilteo/Clinton routes are significantly more likely to feel that the loading and unloading procedures are as efficient as can be expected.
  - Respondents on the Fautleroy/Vashon route are significantly more likely to mention “improving tollbooth management and providing a preferred lane for commuters” (27%) than other riders.
  - One quarter of Seattle/Bremerton riders mentioned “improving pedestrian loading/unloading procedures” as a means to improve efficiency.

Loading/Unloading Process	SEA/ BAIN n=1306	SEA/ BREM n=511	EDM/ KIN n=916	FAU/ VAS n=392	FAU/ SOU n=167	SOU/ VAS n=40	PTD/ TAH n=138	MUK/ CLI n=827	PTT/ COU n=147	ANA/ SJI n=496	INTR SJI n=39	ANA/ SID n=49
Yes, it could be done better	26%	28%	19%	28%	34%	30%	26%	18%	12%	26%	33%	19%
Neutral	42%	43%	32%	40%	35%	43%	44%	37%	26%	38%	32%	15%
No, it is as efficient as could be expected	33%	29%	49%	32%	31%	28%	30%	45%	62%	37%	35%	67%

N22 Do you believe that the loading and unloading process could be done better or more efficiently?

N23 What could they have done to make it better or more efficient?



# Loading/Unloading Problem Terminals

- ❖ Seattle/Bainbridge (39%) and Edmonds/Kingston (27%) are the top two routes where riders feel that loading and unloading could be done better.

## Terminals Needing Loading/Unloading Improvements (n=951)

Route	%	Terminal	%	Terminal	%
Seattle/Bainbridge	39%	Seattle	92%	Bainbridge	65%
Seattle/Bremerton	16%	Seattle	88%	Bremerton	63%
Edmonds/Kingston	27%	Edmonds	92%	Kingston	65%
Fauntleroy/Vashon	16%	Fauntleroy	96%	Vashon	60%
Fauntleroy/Southworth	10%	Fauntleroy	95%	Southworth	55%
Southworth/Vashon	5%	Southworth	77%	Vashon	83%
Point Defiance/Tahlequah	4%	Point Defiance	94%	Tahlequah	94%
Mukilteo/Clinton	14%	Mukilteo	94%	Clinton	51%
Port Townsend/Coupeville	4%	Port Townsend	80%	Coupeville	80%
Anacortes/San Juan Islands	14%	Anacortes	62%	Orcas	32%
		Shaw	8%	Lopez	19%
		Friday Harbor	59%		
San Juan Interisland	3%	Orcas	39%	Shaw	16%
		Lopez	29%	Friday Harbor	84%
Anacortes/Sidney*	1%	Anacortes	93%	Sidney	36%

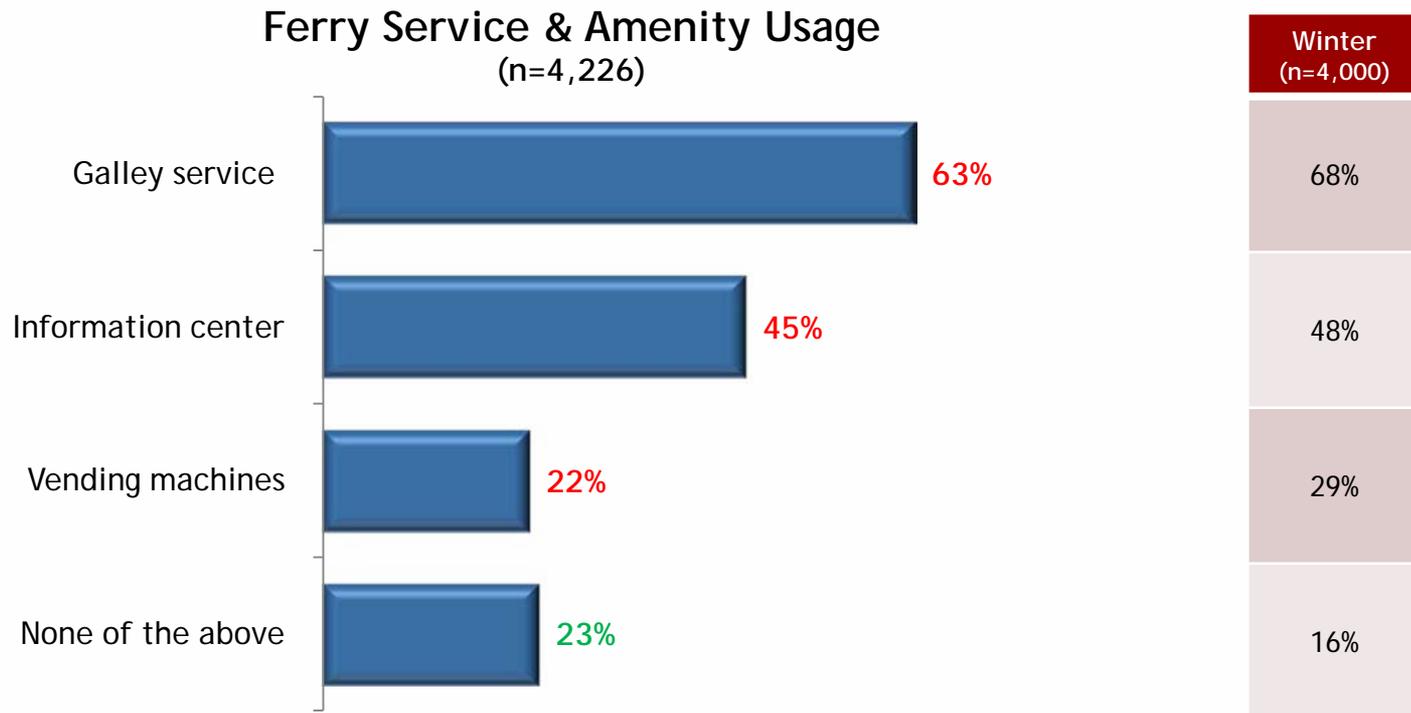
N24 At what terminal(s) would you say loading and unloading could be done better?

\* Caution: Small sample sizes



# Ferry Services & Amenities Usage

- ❖ Usage of all ferry services and amenities decreased in the summer months.
  - Panel members are significantly more likely than the general public to use the galley service and vending machines, while non-panel members are more likely to utilize the information center.
- ❖ 63% of ferry riders use the **galley service** and 45% use the **information center**.
- ❖ More than one fifth (23%) of ferry riders do not use any of the services or amenities offered.



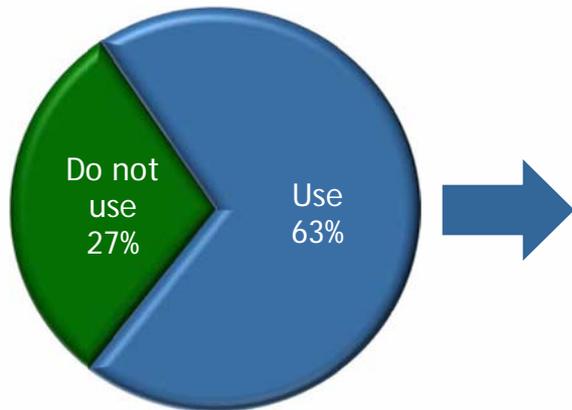
Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.



# Galley Service

- ❖ The galley service is used by 63% of all ferry riders.
- ❖ While satisfaction with the quality of products offered is consistent with winter results, satisfaction with the variety of products offered is significantly lower during the summer (34% vs. 41% winter).
- ❖ Overall, riders remain dissatisfied with the price of galley products, with 49% reporting dissatisfaction.

### Galley Service Usage (n=4,226)



### Galley Service Satisfaction (n=2,620)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.  
Ratings of 3 or don't know are not shown.

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18a How satisfied are you with the following aspects of the galley?



# Galley Service - By Route

- ❖ Use of the galley service is highest among riders of the Seattle/Bainbridge route at 74%.
- ❖ Respondents on the Port Defiance/Tahlequah (33%) and Mukilteo/Clinon (25%) tend to be more satisfied with the prices charged for products in the galley.

Service & Amenity Usage		SEA/ BAIN n=1072 n=1068	SEA/ BREM n=421 n=448	EDM/ KIN n=763 n=755	FAU/ VAS n=326 n=372	FAU/ SOU n=140 n=151	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=685 n=749	PTT/ COU n=124 n=81	ANA/ SJI n=421 n=198	INTR SJI n=27* n=29*	ANA/ SID n=47
Galley service	Summer	74%	71%	64%	59%	60%	52%	23%	57%	48%	56%	41%	66%
	Winter	77%	69%	76%	65%	75%	57%	34%	70%	62%	13%	7%	n/a
Satisfied Top Box (4 & 5 Ratings)		SEA/ BAIN n=791 n=816	SEA/ BREM n=299 n=305	EDM/ KIN n=488 n=574	FAU/ VAS n=192 n=239	FAU/ SOU n=81 n=112	SOU/ VAS n=17* n=18*	PTD/ TAH n=27* n=40	MUK/ CLI n=385 n=518	PTT/ COU n=56 n=46	ANA/ SJI n=232 n=25*	INTR SJI n=11* n=2*	ANA/ SID n=30*
Variety of products offered	Summer	29%	29%	42%	35%	36%	47%	49%	42%	42%	31%	28%	15%
	Winter	40%	33%	41%	43%	42%	46%	41%	48%	42%	37%	0%	n/a
Quality of the products sold	Summer	33%	33%	45%	34%	42%	59%	35%	43%	42%	29%	31%	30%
	Winter	37%	30%	41%	36%	46%	46%	43%	44%	44%	18%	0%	n/a
Price charged	Summer	12%	11%	19%	21%	23%	9%	33%	24%	20%	19%	6%	25%
	Winter	17%	12%	16%	25%	18%	19%	33%	27%	20%	10%	0%	n/a

\* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

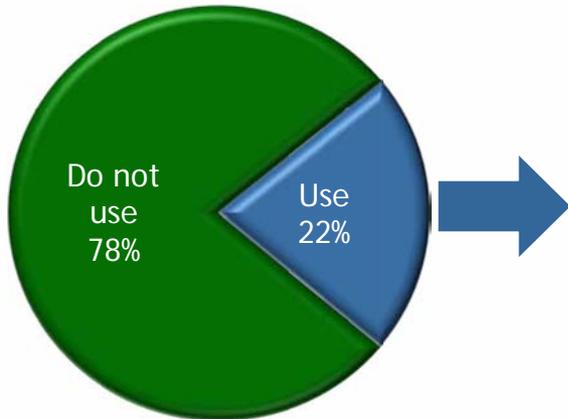
Q18a How satisfied are you with the following aspects of the galley?



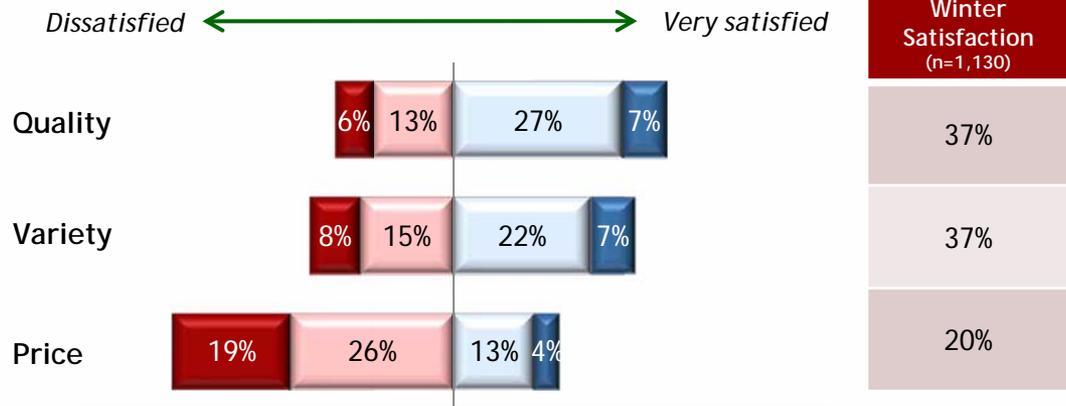
# Vending Machines

- ❖ 22% of ferry riders use the vending machines, with 34% satisfied with the variety and 29% satisfied with the quality of products offered.
- ❖ Only 17% are satisfied with the prices of the vending machine products offered.

**Vending Machine Usage**  
(n=4,226)



**Vending Machine Satisfaction**  
(n=884)



Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown.  
Ratings of 3 or don't know are not shown.

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.  
Q18c How satisfied are you with the following aspects of the vending machines?



# Vending Machines- By Route

- ❖ Vending machine usage is the highest among riders of the Seattle/Bremerton (29%) and Anacortes/San Juan Islands (27%) routes.
- ❖ In general, satisfaction with all aspects of the vending machines is equal among riders of all routes.

Service & Amenity Usage		SEA/ BAIN n=1072 n=1068	SEA/ BREM n=421 n=448	EDM/ KIN n=763 n=755	FAU/ VAS n=326 n=372	FAU/ SOU n=140 n=151	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=685 n=749	PTT/ KEY n=124 n=81	ANA/ SJI n=421 n=198	INTR SJI n=27* n=29*	ANA/ SID n=47
Vending Machines	Summer	22%	29%	20%	21%	20%	26%	17%	17%	24%	27%	25%	13%
	Winter	31%	38%	27%	26%	29%	28%	18%	21%	32%	43%	37%	n/a

Satisfied Top Box (4 & 5 Ratings)		SEA/ BAIN n=230 n=327	SEA/ BREM n=122 n=166	EDM/ KIN n=144 n=200	FAU/ VAS n=68 n=95	FAU/ SOU n=28* n=44	SOU/ VAS n=9* n=9*	PTD/ TAH n=20* n=21*	MUK/ CLI n=111 n=151	PTT/ KEY n=24* n=22*	ANA/ SJI n=112 n=84	INTR SJI n=7* n=8*	ANA/ SID n=4*
Variety of vending products offered	Summer	25%	25%	34%	17%	32%	14%	13%	37%	37%	34%	26%	67%
	Winter	39%	38%	42%	31%	30%	20%	48%	41%	28%	26%	20%	n/a
Quality of vending products sold	Summer	30%	33%	40%	21%	31%	14%	60%	39%	39%	33%	36%	67%
	Winter	40%	38%	37%	30%	36%	20%	48%	42%	20%	26%	39%	n/a
Price charged	Summer	11%	11%	20%	11%	12%	0%	55%	25%	16%	19%	11%	67%
	Winter	24%	15%	18%	15%	17%	10%	32%	22%	20%	16%	0%	n/a

\* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

Q18c How satisfied are you with the following aspects of the vending machines?



# Information Center - By Route

- ❖ Use of the information center is highest among the Southworth/Vashon and Fautleroy/Southworth routes.

Service & Amenity Usage		SEA/ BAIN n=1072 n=1068	SEA/ BREM n=421 n=448	EDM/ KIN n=763 n=755	FAU/ VAS n=326 n=372	FAU/ SOU n=140 n=151	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=685 n=749	PTT/ COUP n=124 n=81	ANA/ SJI n=421 n=198	INTR SJI n=27* n=29*	ANA/ SID n=47
Information Center	Summer	39%	51%	53%	39%	55%	61%	36%	44%	50%	48%	22%	44%
	Winter	41%	49%	55%	46%	55%	48%	41%	52%	52%	51%	48%	n/a

Satisfied Top Box (4 & 5 Ratings)		SEA/ BAIN n=410 n=433	SEA/ BREM n=211 n=219	EDM/ KIN n=400 n=413	FAU/ VAS n=125 n=170	FAU/ SOU n=77 n=83	SOU/ VAS n=20* n=15*	PTD/ TAH n=41 n=48	MUK/ CLI n=295 n=388	PTT/ COUP n=60 n=42	ANA/ SJI n=199 n=102	INTR SJI n=6* n=14*	ANA/ SID n=21*
Information provided	Summer	66%	65%	78%	65%	73%	94%	62%	75%	72%	76%	61%	36%
	Winter	72%	78%	77%	65%	79%	71%	69%	77%	76%	73%	37%	n/a

\* Caution: Small sample sizes

Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

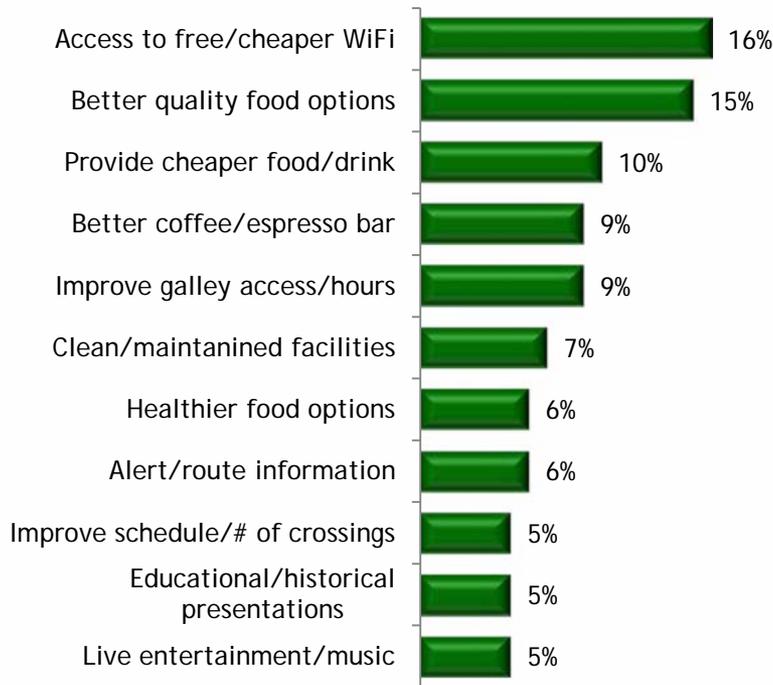
Q18e How satisfied are you with the information provided in the information center?



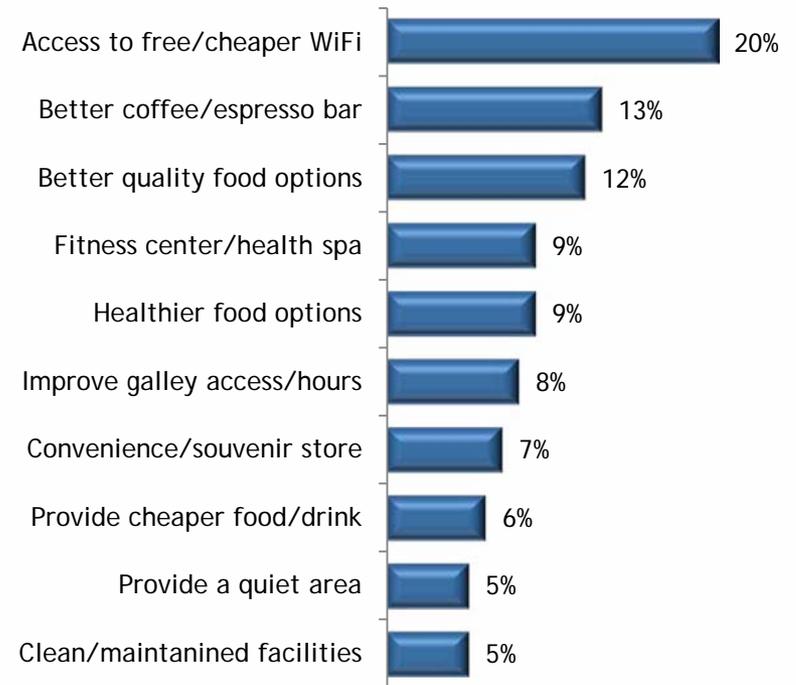
# Other On-Board Services & Amenities

- ❖ Of those who provided suggestions for additional on-board services and amenities, access to free/cheaper WiFi (16%) and better quality food options (15%) are the most frequently mentioned.

**Top Suggested Services & Amenities (Summer)**  
(n=1,721)



**Top Suggested Services & Amenities (Winter)**  
(n=1,638)

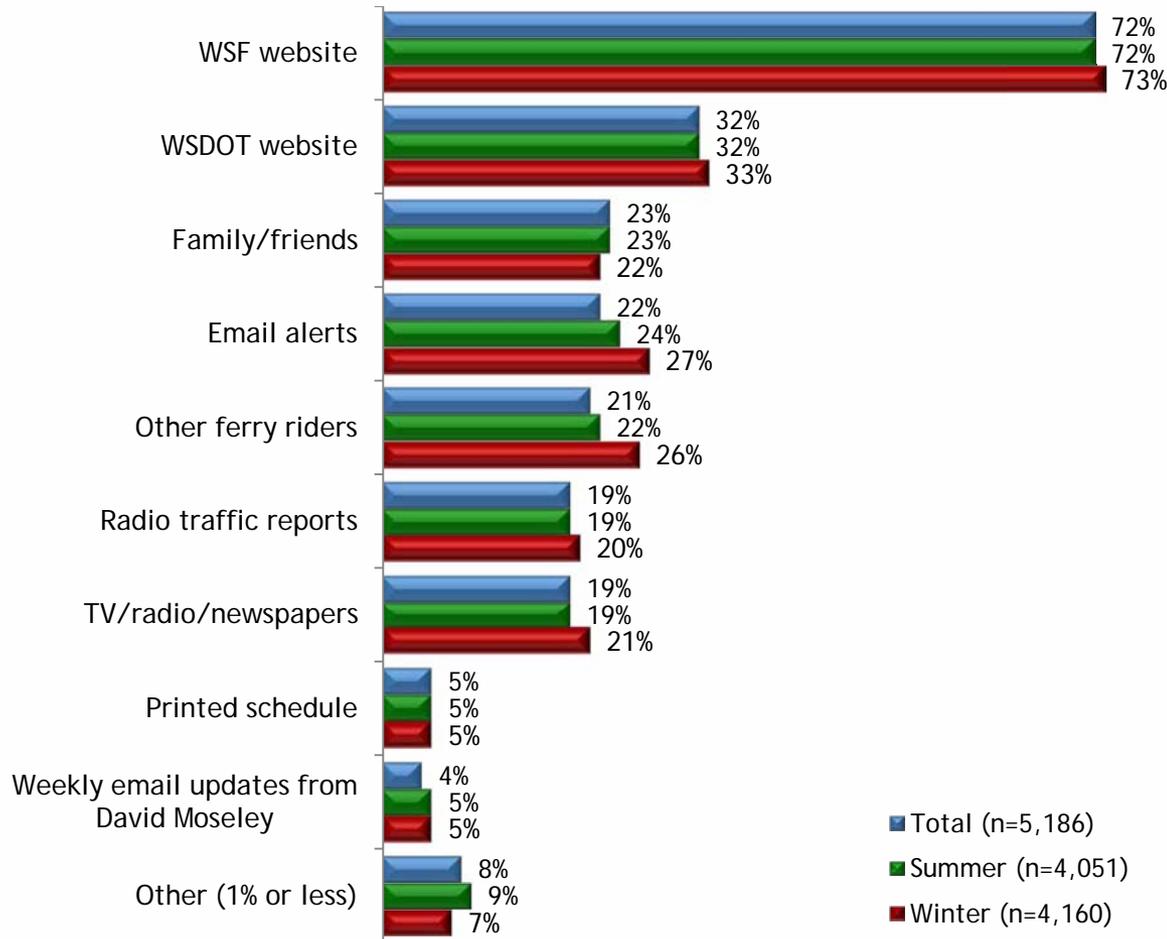


Q20 What, if any, services or amenities would you likely use if it was offered on your ferry?



# WSF Information - Current Sources

## Sources of WSF Information



- ❖ The majority (72%) of ferry riders obtain information about WSF from the ferry website.
- ❖ With the exception of family/friends and the printed schedule, summer riders are significantly less likely than winter riders to use each of the information sources regarding the ferry system.

Q23 Which of the following do you use to obtain information about Washington State Ferries?

\*Differs due to weighting



# Current WSF Information - By Route

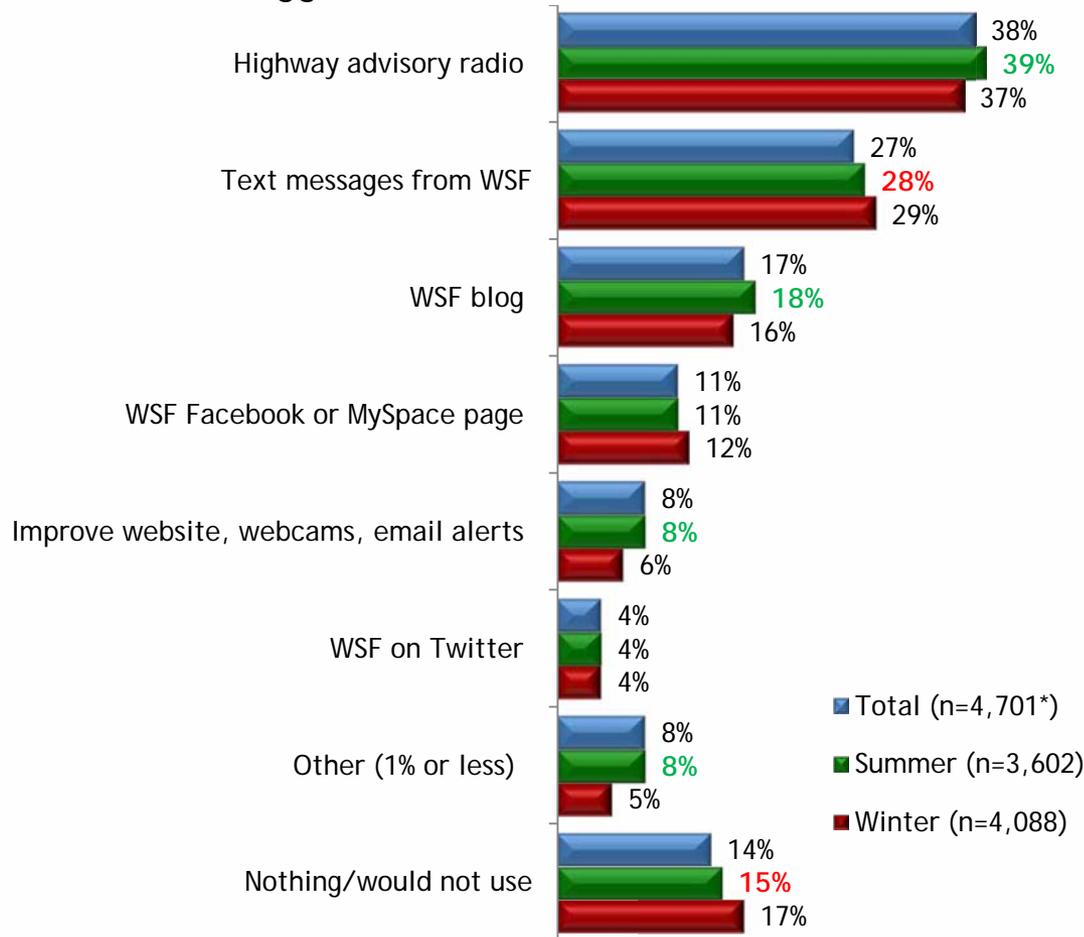
Current Sources of WSF Information		SEA/ BAIN n=1028 n=1117	SEA/ BREM n=398 n=473	EDM/ KIN n=719 n=794	FAU/ VAS n=315 n=376	FAU/ SOU n=130 n=151	SOU/ VAS n=32 n=31	PTD/ TAH n=113 n=118	MUK/ CLI n=659 n=776	PTT/ KEY n=125 n=85	ANA/ SJI n=401 n=208	INTR SJI n=31 n=29*	ANA/ SID n=46
WSF website	Summer	71%	72%	71%	73%	75%	82%	74%	72%	72%	77%	64%	71%
	Winter	73%	71%	73%	69%	71%	76%	80%	73%	85%	77%	77%	n/a
WSDOT website	Summer	31%	30%	34%	26%	42%	36%	28%	37%	31%	27%	26%	26%
	Winter	31%	30%	39%	26%	36%	31%	24%	36%	46%	31%	21%	n/a
Family/friends	Summer	23%	16%	18%	33%	19%	30%	30%	22%	23%	31%	22%	29%
	Winter	22%	19%	16%	31%	15%	32%	28%	22%	19%	29%	35%	n/a
Email alerts	Summer	27%	36%	14%	34%	35%	51%	51%	20%	12%	15%	23%	3%
	Winter	26%	36%	18%	43%	34%	40%	39%	22%	30%	25%	32%	n/a
Other ferry riders	Summer	25%	29%	15%	32%	20%	43%	35%	22%	12%	19%	24%	16%
	Winter	27%	29%	18%	35%	24%	35%	33%	26%	15%	27%	51%	n/a
Radio traffic reports	Summer	20%	18%	21%	19%	21%	44%	20%	22%	14%	8%	2%	0%
	Winter	19%	14%	25%	21%	22%	24%	23%	23%	16%	10%	5%	n/a
TV/radio/ newspapers	Summer	18%	28%	19%	19%	23%	16%	24%	20%	20%	11%	10%	3%
	Winter	19%	25%	23%	21%	21%	8%	27%	21%	15%	15%	4%	n/a
Printed schedule	Summer	7%	7%	6%	4%	3%	1%	1%	3%	9%	7%	3%	0%
	Winter	6%	5%	4%	5%	6%	0%	2%	2%	5%	6%	4%	n/a
Other	Summer	9%	8%	12%	22%	10%	36%	25%	17%	11%	14%	19%	23%
	Winter	9%	8%	14%	17%	12%	17%	15%	11%	11%	18%	15%	n/a

Q23 Which of the following do you use to obtain information about Washington State Ferries?



# Future WSF Information - Suggested Sources

## Suggested Sources of WSF Information



- ❖ Roughly two in five (38%) riders would use **highway advisory radio** for WSF information, if it were available.
- ❖ One quarter (27%) of summer riders would utilize text messages from WSF, however only 4% would follow WSF on Twitter.

*\*Differs due to weighting*

Q24 Which of the following, if it were available, would you use to obtain information about Washington State Ferries?



# Future WSF Information - By Route

Suggested Sources of WSF Information		SEA/ BAIN n=938 n=1102	SEA/ BREM n=384 n=465	EDM/ KIN n=630 n=780	FAU/ VAS n=291 n=367	FAU/ SOU n=125 n=151	SOU/ VAS n=31 n=31	PTD/ TAH n=108 n=117	MUK/ CLI n=602 n=761	PTT/ COU n=92 n=85	ANA/ SJI n=329 n=201	INTR SJI n=23* n=28*	ANA/ SID n=16*
Highway advisory radio	Summer	32%	27%	51%	33%	42%	31%	38%	47%	46%	37%	37%	36%
	Winter	31%	24%	51%	33%	39%	34%	38%	44%	42%	35%	26%	n/a
Text messages from WSF	Summer	32%	35%	25%	30%	32%	44%	28%	24%	20%	23%	13%	36%
	Winter	31%	36%	26%	34%	31%	23%	26%	23%	32%	23%	14%	n/a
WSF blog	Summer	18%	20%	15%	19%	23%	21%	14%	16%	13%	24%	12%	9%
	Winter	17%	17%	12%	18%	20%	33%	10%	14%	11%	22%	20%	n/a
WSF Facebook or MySpace page	Summer	11%	16%	12%	9%	12%	6%	10%	9%	11%	13%	6%	0%
	Winter	12%	18%	12%	8%	11%	8%	5%	10%	13%	10%	8%	n/a
Improve exiting website, web cams email alerts	Summer	7%	5%	9%	8%	4%	4%	6%	8%	11%	11%	5%	0%
	Winter	6%	5%	6%	5%	4%	0%	7%	6%	6%	8%	4%	n/a
WSF on Twitter	Summer	4%	6%	3%	5%	5%	8%	9%	1%	2%	4%	3%	0%
	Winter	6%	5%	3%	7%	2%	3%	0%	2%	1%	3%	0%	n/a
Other (less than 1%)	Summer	8%	7%	6%	9%	8%	15%	7%	7%	10%	10%	28%	27%
	Winter	4%	5%	5%	4%	6%	0%	9%	4%	6%	8%	15%	n/a
Nothing/would not use	Summer	16%	20%	10%	16%	14%	15%	24%	15%	14%	12%	15%	27%
	Winter	18%	18%	12%	18%	13%	15%	28%	18%	14%	17%	33%	n/a



# Rider Characteristics & Demographic Information



# Years Riding

❖ 71% of ferry riders have been riding the ferries for more than ten years.

Years Riding WSF	Total 2010 n=5,129**	Summer 2010 n=4,254	Winter 2010 n=4,171
Less than one year	2%	2%	3%
1 year, but less than 3 years	5%	5%	5%
3 years, but less than 6 years	9%	9%	10%
6 years, but less than 10 years	11%	10%	12%
More than 10 years	73%	72%	71%

\* Caution: Small sample sizes  
\*\*Differs due to weighting

Years Riding WSF		SEA/ BAIN n=723 n=1120	SEA/ BREM n=330 n=476	EDM/ KIN n=773 n=795	FAU/ VAS n=326 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=694 n=776	PTT/ COU n=125 n=85	ANA/ SJI n=424 n=210	INTER SJI n=33 n=29*	ANA/ SID n=46
<1 year	Summer	3%	6%	1%	1%	<1%	0%	2%	1%	3%	2%	0%	6%
	Winter	3%	6%	2%	1%	2%	0%	4%	1%	5%	3%	0%	n/a
1-3 years	Summer	7%	8%	4%	4%	4%	4%	5%	4%	6%	5%	4%	0%
	Winter	6%	9%	5%	2%	3%	7%	4%	5%	3%	5%	<1%	n/a
3-6 years	Summer	8%	12%	8%	9%	9%	10%	10%	9%	4%	7%	5%	19%
	Winter	10%	14%	7%	10%	9%	6%	9%	9%	3%	6%	4%	n/a
6-10 years	Summer	12%	13%	8%	7%	16%	15%	10%	10%	7%	9%	4%	16%
	Winter	14%	11%	11%	11%	19%	17%	12%	11%	9%	8%	1%	n/a
10+ years	Summer	70%	60%	78%	79%	71%	72%	73%	76%	74%	74%	68%	55%
	Winter	67%	59%	75%	76%	66%	70%	71%	73%	80%	79%	95%	n/a



# Ridership Frequency

- ❖ 48% of riders have increased their ferry riding frequency since they first started riding the ferries.
- ❖ Summer wave mentions of “increased significantly” are higher when weighted by volume (28% vs. 25%).

Ridership Frequency	Total 2010 n=5,158**	Summer 2010 n=4,196	Winter 2010 n=4,170	Total 2008 n=12,199	Summer 2008 n=7,053	Winter 2008 n=5,146
Increased significantly	24%	25%	28%	15%	13%	17%
Increased somewhat	23%	25%	21%	18%	16%	22%
No change	29%	29%	29%	45%	51%	36%
Decreased somewhat	15%	15%	14%	15%	13%	16%
Decreased significantly	8%	9%	8%	8%	8%	8%

\* Caution: Small sample sizes  
\*\*Differs due to weighting

Ridership Frequency		SEA/ BAIN n=1084 n=1120	SEA/ BREM n=421 n=475	EDM/ KIN n=757 n=795	FAU/ VAS n=325 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=694 n=776	PTT/ COU n=116 n=85	ANA/ SJI n=408 n=210	INTR SJI n=27* n=29*	ANA/ SID n=44
Increased significantly	Summer	23%	24%	24%	27%	22%	31%	18%	30%	21%	24%	28%	7%
	Winter	23%	27%	28%	26%	22%	35%	23%	33%	43%	31%	35%	n/a
Increased somewhat	Summer	19%	19%	26%	20%	24%	16%	21%	23%	23%	31%	17%	50%
	Winter	19%	17%	23%	22%	24%	15%	21%	21%	24%	31%	40%	n/a
No change	Summer	33%	36%	27%	25%	37%	34%	22%	24%	29%	25%	38%	17%
	Winter	31%	37%	29%	23%	36%	41%	24%	25%	15%	18%	16%	n/a
Decreased somewhat	Summer	17%	12%	14%	15%	13%	16%	23%	16%	18%	13%	14%	13%
	Winter	16%	12%	12%	19%	13%	3%	20%	14%	15%	14%	8%	n/a
Decreased significantly	Summer	8%	9%	9%	12%	5%	4%	17%	8%	9%	6%	3%	13%
	Winter	11%	6%	8%	9%	3%	6%	12%	7%	3%	6%	<1%	n/a



# Rider Satisfaction

Ferry Satisfaction	Total 2010 n=5,227**	Summer 2010 n=4,170	Winter 2010 n=4,170	Total 2008 n=12,156	Summer 2008 n=7,204	Winter 2008 n=4,952
Satisfied	75%	72%	72%	68%	72%	64%
Extremely satisfied	27%	24%	25%	25%	29%	20%
Somewhat satisfied	48%	48%	47%	43%	43%	44%
Neither	10%	11%	11%	12%	12%	12%
Somewhat dissatisfied	12%	14%	14%	15%	13%	17%
Extremely dissatisfied	3%	3%	3%	5%	3%	6%
Dissatisfied	15%	17%	17%	20%	16%	23%

\* Caution: Small sample sizes  
\*\*Differs due to weighting

Ferry Satisfaction		SEA/ BAIN n=1085 n=1120	SEA/ BREM n=421 n=474	EDM/ KIN n=772 n=795	FAU/ VAS n=327 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=693 n=776	PTT/ COU n=124 n=85	ANA/ SJI n=425 n=210	INTR SJI n=33 n=29*	ANA/ SID n=47
Satisfied	Summer	79%	62%	74%	60%	67%	70%	56%	77%	78%	68%	61%	87%
	Winter	78%	64%	74%	60%	68%	62%	66%	77%	83%	57%	60%	n/a
Extremely satisfied	Summer	28%	16%	28%	15%	15%	12%	15%	32%	29%	18%	12%	13%
	Winter	29%	19%	30%	15%	19%	11%	12%	32%	23%	10%	8%	n/a
Somewhat satisfied	Summer	51%	45%	46%	45%	52%	58%	41%	45%	49%	50%	49%	75%
	Winter	49%	45%	44%	45%	49%	51%	54%	45%	60%	47%	52%	n/a
Neither	Summer	10%	12%	9%	19%	10%	11%	15%	11%	8%	8%	10%	3%
	Winter	9%	12%	9%	18%	10%	15%	15%	12%	4%	14%	6%	n/a
Somewhat dissatisfied	Summer	9%	21%	14%	19%	17%	19%	28%	9%	12%	18%	26%	9%
	Winter	11%	19%	16%	20%	16%	23%	15%	9%	11%	23%	17%	n/a
Extremely dissatisfied	Summer	2%	6%	4%	2%	6%	0%	2%	2%	2%	6%	3%	0%
	Winter	3%	5%	2%	2%	5%	0%	3%	2%	3%	6%	17%	n/a
Dissatisfied	Summer	12%	27%	17%	21%	23%	19%	29%	12%	14%	24%	29%	9%
	Winter	14%	24%	18%	22%	21%	23%	18%	11%	14%	29%	34%	n/a



# People vs. Vehicle Mover

- ❖ 57% of ferry riders (54%, weighted by volume) believe that the WSF should focus its improvement on becoming **both** a people-mover and a vehicle-mover system.

People vs. Vehicle Mover	Total 2010 n=5,198**	Summer 2010 n=4,230	Winter 2010 n=4,168	Total 2008 n=12,278	Summer 2008 n=7,070	Winter 2008 n=5,208
People-mover system	23%	22%	27%	24%	23%	27%
Both equally	51%	50%	47%	56%	59%	51%
Vehicle-mover system	27%	28%	26%	20%	18%	22%

\* Caution: Small sample sizes

\*\*Differs due to weighting

People vs. Vehicle Mover		SEA/ BAIN n=1084 n=1120	SEA/ BREM n=421 n=475	EDM/ KIN n=769 n=793	FAU/ VAS n=325 n=377	FAU/ SOU n=140 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=687 n=776	PTT/ COU n=124 n=85	ANA/ SJI n=416 n=210	INTR SJI n=33 n=29*	ANA/ SID n=46
People-mover	Summer	12%	12%	24%	28%	32%	16%	28%	33%	20%	30%	34%	10%
	Winter	19%	17%	26%	32%	31%	15%	26%	39%	35%	37%	29%	n/a
Both equally	Summer	53%	37%	52%	48%	42%	44%	56%	46%	58%	55%	53%	74%
	Winter	51%	39%	52%	41%	42%	41%	54%	44%	42%	45%	55%	n/a
Vehicle-mover	Summer	35%	50%	24%	24%	26%	40%	16%	22%	22%	15%	13%	16%
	Winter	30%	43%	21%	27%	27%	44%	19%	18%	23%	18%	15%	n/a



# Demographics - Distance From Ferry

Distance from Ferry	Total 2010 n=5,091**	Summer 2010 n=4,142	Winter 2010 n=4,168
Less than 1 mile	<1%	1%	1%
1-5 miles	34%	36%	38%
6-10 miles	25%	25%	27%
11-15 miles	13%	12%	13%
16-20 miles	7%	7%	7%
Over 20 miles	20%	19%	15%
Median	9 miles	10 miles	8 miles

\* Caution: Small sample sizes  
\*\*Differs due to weighting

Distance from Ferry		SEA/ BAIN n=1083 n=1121	SEA/ BREM n=420 n=475	EDM/ KIN n=740 n=793	FAU/ VAS n=325 n=377	FAU/ SOU n=139 n=152	SOU/ VAS n=32 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=685 n=776	PTT/ COU n=111 n=85	ANA/ SJI n=387 n=210	INTR SJI n=32 n=29	ANA/ SID n=43
<1 mile	Summer	1%	<1%	0%	2%	<1%	0%	2%	<1%	0%	<1%	0%	0%
	Winter	1%	<1%	<1%	3%	<1%	0%	0%	0%	0%	1%	0%	n/a
1-5 miles	Summer	50%	54%	27%	35%	44%	44%	34%	20%	27%	27%	25%	35%
	Winter	53%	51%	30%	31%	44%	31%	33%	22%	21%	35%	35%	n/a
6-10 miles	Summer	23%	21%	22%	32%	35%	40%	42%	30%	15%	23%	22%	17%
	Winter	21%	23%	22%	40%	36%	51%	42%	31%	12%	27%	41%	n/a
11-15 miles	Summer	9%	9%	13%	25%	8%	4%	8%	18%	5%	7%	25%	3%
	Winter	10%	10%	11%	22%	10%	13%	15%	20%	13%	10%	23%	n/a
16-20 miles	Summer	5%	6%	11%	2%	3%	0%	1%	11%	5%	4%	2%	31%
	Winter	5%	7%	9%	2%	4%	0%	2%	10%	13%	5%	<1%	n/a
21+ miles	Summer	12%	11%	27%	4%	9%	12%	14%	20%	48%	39%	26%	14%
	Winter	11%	8%	28%	2%	6%	6%	8%	17%	41%	23%	<1%	n/a
Median	Summer	5	5	11	8	6	7	8	11	20	11	14	10
	Winter	5	5	10	8	6	7	8	10	20	10	8	n/a



# Demographics - Gender

Gender	Total 2010 n=5,145**	Summer 2010 n=4,186	Winter 2010 n=4,169	Total 2008 n=11,006	Summer 2008 n=7,105	Winter 2008 n=3,901
Male	46%	46%	48%	48%	47%	49%
Female	54%	54%	52%	52%	53%	51%

\* Caution: Small sample sizes

\*\*Differs due to weighting

Gender		SEA/ BAIN n=1064 n=1121	SEA/ BREM n=418 n=474	EDM/ KIN n=760 n=793	FAU/ VAS n=323 n=377	FAU/ SOU n=137 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=682 n=776	PTT/ COU n=120 n=85	ANA/ SJI n=422 n=210	INTR SJI n=33 n=29*	ANA/ SID n=46
Male	Summer	48%	49%	40%	50%	48%	43%	50%	47%	39%	49%	34%	29%
	Winter	46%	48%	45%	50%	49%	45%	59%	48%	49%	54%	64%	n/a
Female	Summer	52%	51%	60%	50%	52%	57%	50%	53%	61%	51%	66%	71%
	Winter	54%	52%	55%	50%	51%	55%	41%	52%	51%	46%	36%	n/a



# Demographics - Age

Age	Total 2010 n=5,063**	Summer 2010 n=1,522	Winter 2010 n=4,159	Total 2008 n=11,960	Summer 2008 n=7,147	Winter 2008 n=4,813
18-24	2%	2%	2%	5%	7%	4%
25-34	8%	8%	8%	10%	12%	10%
35-44	13%	14%	13%	16%	17%	16%
45-54	24%	24%	24%	26%	25%	26%
55-64	32%	29%	34%	28%	24%	28%
65+	21%	23%	20%	15%	14%	15%
Median Age	56	55	56	52	50	52

\* Caution: Small sample sizes  
\*\*Differs due to weighting

Age		SEA/ BAIN n=1057 n=1118	SEA/ BREM n=418 n=474	EDM/ KIN n=743 n=791	FAU/ VAS n=317 n=377	FAU/ SOU n=137 n=152	SOU/ VAS n=33 n=31	PTD/ TAH n=114 n=118	MUK/ CLI n=672 n=775	PTT/ COU n=113 n=85	ANA/ SJI n=409 n=209	INTR SJI n=33 n=29*	ANA/ SID n=46
18-24	Summer	2%	2%	2%	0%	0%	0%	4%	1%	3%	1%	0%	0%
	Winter	2%	5%	2%	2%	0%	0%	2%	<1%	1%	1%	0%	n/a
25-34	Summer	7%	15%	7%	5%	8%	7%	6%	3%	9%	8%	4%	6%
	Winter	7%	21%	7%	4%	4%	13%	7%	4%	4%	4%	10%	n/a
35-44	Summer	15%	19%	12%	14%	15%	14%	7%	10%	9%	13%	2%	16%
	Winter	16%	15%	12%	13%	16%	17%	11%	9%	10%	10%	4%	n/a
45-54	Summer	24%	27%	28%	21%	26%	28%	20%	22%	20%	21%	32%	10%
	Winter	23%	27%	24%	23%	32%	13%	27%	22%	22%	17%	28%	n/a
55-64	Summer	32%	25%	31%	40%	40%	35%	37%	38%	28%	31%	37%	48%
	Winter	33%	20%	35%	39%	36%	39%	34%	40%	40%	35%	34%	n/a
65+	Summer	20%	13%	20%	21%	12%	17%	26%	27%	30%	26%	24%	19%
	Winter	19%	12%	21%	19%	12%	18%	18%	25%	22%	32%	23%	n/a
Median Age	Summer	55	51	55	57	55	56	57	59	58	58	62	62
	Winter	55	48	57	56	54	57	56	59	59	60	60	n/a



# Demographics - Employment & Income

Employment Status	Total 2010 n=5,151*	Summer 2010 n=4,203	Winter 2010 n=4,111	Total 2008 n=11,947	Summer 2008 n=7,098	Winter 2008 n=4,849
Employed full-time	54%	55%	56%	61%	60%	63%
Employed part-time	12%	11%	11%	10%	10%	9%
Student/employed	1%	1%	2%	4%	4%	4%
Student/not employed	1%	1%	1%	2%	2%	2%
Military personnel	1%	<1%	1%	1%	1%	1%
Retired	22%	22%	20%	16%	17%	16%
Homemaker	3%	3%	3%	3%	4%	3%
Not employed	3%	2%	3%	1%	2%	1%
Other	3%	3%	4%	2%	2%	2%

Annual Income	Total 2010 n=4,182*	Summer 2010 n=3,423	Winter 2010 n=3,389	Total 2008 n=9,636	Summer 2008 n=5,703	Winter 2008 n=3,934
Under \$15,000	2%	2%	2%	4%	4%	3%
\$15,000-\$24,999	4%	4%	4%	4%	4%	3%
\$25,000-\$34,999	5%	5%	6%	6%	6%	6%
\$35,000-\$49,999	10%	10%	10%	11%	11%	11%
\$50,000-\$74,999	21%	22%	19%	20%	21%	23%
\$75,000-\$99,999	20%	20%	21%	18%	19%	19%
\$100,000-\$149,999	22%	23%	22%	20%	20%	21%
\$150,000 or more	16%	16%	16%	16%	15%	14%

\*Differs due to weighting



# Demographics - Employment By Route

Employment Status		SEA/ BAIN n=1075 n=1111	SEA/ BREM n=415 n=467	EDM/ KIN n=762 n=771	FAU/ VAS n=326 n=376	FAU/ SOU n=139 n=151	SOU/ VAS n=32 n=31	PTD/ TAH n=114 n=117	MUK/ CLI n=683 n=765	PTT/ COU n=121 n=83	ANA/ SJI n=421 n=207	INTR SJI n=32 n=29*	ANA/ SID N=46
Employed full-time	Summer	59%	66%	56%	57%	72%	66%	48%	50%	39%	45%	28%	32%
	Winter	57%	63%	56%	58%	71%	68%	51%	48%	43%	40%	32%	n/a
Employed part-time	Summer	12%	7%	10%	14%	7%	15%	8%	10%	12%	17%	26%	0%
	Winter	11%	8%	10%	11%	9%	7%	18%	10%	12%	14%	27%	n/a
Student/ employed	Summer	2%	3%	1%	1%	0%	0%	0%	1%	1%	1%	2%	0%
	Winter	1%	3%	2%	1%	<1%	6%	1%	1%	3%	1%	0%	n/a
Student/not employed	Summer	1%	2%	1%	1%	0%	0%	2%	1%	2%	1%	0%	0%
	Winter	2%	4%	1%	1%	0%	0%	1%	<1%	0%	<1%	0%	n/a
Military personnel	Summer	0%	1%	1%	0%	0%	0%	0%	0%	1%	<1%	0%	0%
	Winter	<1%	2%	1%	0%	<1%	0%	0%	<1%	1%	0%	0%	n/a
Retired	Summer	19%	13%	23%	19%	15%	12%	24%	29%	35%	25%	21%	55%
	Winter	17%	10%	21%	16%	14%	8%	19%	27%	27%	32%	31%	n/a
Homemaker	Summer	2%	2%	3%	0%	2%	0%	2%	4%	5%	4%	18%	6%
	Winter	3%	1%	2%	1%	1%	0%	4%	3%	2%	3%	3%	n/a
Not employed	Summer	2%	5%	2%	2%	2%	3%	2%	3%	2%	3%	0%	0%
	Winter	3%	4%	2%	5%	2%	0%	3%	4%	5%	4%	0%	n/a

\* Caution: Small sample sizes

Note: red outline indicates largest difference between summer and winter data.



# Demographics - Annual Income By Route

Annual Income		SEA/ BAIN n=845 n=922	SEA/ BREM n=370 n=396	EDM/ KIN n=623 n=621	FAU/ VAS n=262 n=321	FAU/ SOU n=121 n=123	SOU/ VAS n=29* n=27*	PTD/ TAH n=104 n=98	MUK/ CLI n=538 n=635	PTT/ COU n=96 n=72	ANA/ SJI n=348 n=168	INTR SJI n=21* n=26*	ANA/ SID n=41
Under \$15,000	Summer	1%	4%	2%	3%	1%	0%	3%	1%	3%	2%	4%	0%
	Winter	2%	3%	1%	4%	<1%	0%	3%	1%	1%	1%	<1%	n/a
\$15,000- \$24,999	Summer	3%	3%	4%	1%	1%	0%	6%	4%	6%	4%	11%	0%
	Winter	3%	3%	3%	3%	2%	0%	4%	3%	7%	4%	14%	n/a
\$25,000- \$34,999	Summer	3%	8%	4%	5%	2%	0%	4%	5%	5%	6%	10%	21%
	Winter	3%	8%	5%	4%	1%	7%	5%	5%	7%	8%	11%	n/a
\$35,000- \$49,999	Summer	8%	10%	10%	11%	9%	15%	5%	12%	16%	11%	18%	4%
	Winter	6%	9%	8%	9%	8%	7%	6%	10%	14%	11%	8%	n/a
\$50,000- \$74,999	Summer	19%	23%	20%	21%	28%	18%	17%	21%	22%	20%	14%	43%
	Winter	13%	22%	13%	14%	18%	20%	20%	16%	24%	22%	19%	n/a
\$75,000- \$99,999	Summer	19%	22%	22%	18%	22%	22%	33%	19%	22%	18%	29%	7%
	Winter	17%	17%	19%	16%	19%	18%	19%	17%	10%	12%	10%	n/a
\$100,000- \$149,999	Summer	26%	19%	25%	26%	25%	24%	20%	23%	16%	20%	11%	11%
	Winter	20%	14%	20%	18%	20%	18%	15%	17%	17%	11%	15%	n/a
\$150,000 or more	Summer	21%	11%	14%	15%	11%	22%	13%	15%	9%	18%	3%	14%
	Winter	18%	8%	10%	18%	13%	17%	13%	13%	4%	10%	11%	n/a

\* Caution: Small sample sizes

Note: red outline indicates largest difference between summer and winter data.



# Demographics - Industry

Employment Industry		Total n=3402	SEA/ BAIN n=775 n=783	SEA/ BREM n=316 n=355	EDM/ KIN n=495 n=523	FAU/ VAS n=233 n=264	FAU/ SOU n=107 n=119	SOU/ VAS n=26* n=25*	PTD/ TAH n=64 n=82	MUK/ CLI n=392 n=437	PTT/ COU n=62 n=48	ANA/ SJI n=260 n=114	INTR SJI n=18* n=16*	ANA/ SID n=13*
Services	Summer	19%	19%	14%	18%	25%	18%	27%	20%	19%	20%	24%	8%	0%
	Winter		19%	17%	15%	19%	11%	30%	21%	16%	15%	17%	20%	n/a
Education	Summer	9%	6%	8%	12%	6%	11%	14%	12%	8%	13%	12%	9%	44%
	Winter		4%	6%	10%	8%	5%	14%	12%	8%	5%	7%	0%	n/a
Healthcare	Summer	9%	8%	9%	11%	11%	7%	8%	15%	6%	10%	10%	4%	0%
	Winter		7%	7%	6%	10%	13%	9%	25%	7%	10%	9%	1%	n/a
Finance, insurance	Summer	8%	9%	10%	6%	4%	6%	7%	0%	10%	6%	5%	8%	33%
	Winter		8%	8%	6%	8%	6%	0%	3%	7%	4%	6%	1%	n/a
Transp./ comm.	Summer	7%	9%	12%	5%	8%	9%	0%	7%	8%	4%	6%	8%	0%
	Winter		7%	9%	7%	6%	10%	5%	6%	7%	8%	7%	18%	n/a
Public admin.	Summer	7%	7%	7%	7%	5%	8%	5%	7%	3%	9%	6%	1%	0%
	Winter		8%	9%	6%	4%	10%	9%	9%	4%	10%	6%	7%	n/a
Manuf.	Summer	6%	3%	2%	9%	9%	5%	4%	6%	13%	3%	4%	1%	0%
	Winter		3%	2%	8%	10%	8%	3%	2%	13%	2%	5%	1%	n/a
Retail trade	Summer	5%	6%	6%	4%	6%	4%	0%	8%	4%	5%	7%	36%	0%
	Winter		5%	4%	4%	7%	6%	7%	2%	6%	2%	8%	1%	n/a
Construc.	Summer	5%	3%	2%	5%	5%	5%	7%	3%	4%	5%	5%	1%	0%
	Winter		4%	4%	6%	4%	3%	12%	3%	4%	11%	8%	2%	n/a
IT/high tech	Summer	4%	5%	6%	2%	4%	6%	13%	3%	5%	0%	4%	0%	0%
	Winter		7%	6%	3%	3%	5%	0%	2%	5%	1%	3%	0%	n/a
Federal/ local gov't	Summer	4%	3%	5%	6%	2%	4%	0%	3%	3%	7%	1%	4%	0%
	Winter		4%	7%	5%	2%	3%	0%	1%	2%	7%	2%	7%	n/a

Note: red outline indicates largest difference between summer and winter data.

\* Caution: Small sample sizes



# Appendix A: Summer Questionnaire



# Questionnaire



## Washington State Transportation Commission

Dear Washington State Ferries Rider;

Thank you for your interest in helping the Washington State Transportation Commission learn more about your opinions and preferences for the ferry system.

We greatly appreciate you taking time out of your busy day to complete this survey. This is your opportunity to voice your opinions and concerns on some important ferry issues.

Your comments will influence critical decisions at the state level, so please join us in this important study!

Once you complete the survey, please hand it back to a Ferry Riders' Opinion Group (F.R.O.G.) research crew member on-board or fold it in half and staple/tape it shut and just drop it in the mail.

If it is more convenient for you, you can complete the survey online by going to the following web site:

<http://www.ferryridersopiniongroup.com/summer>

Over the next few months, we will be conducting several short surveys on "Funding for new boats & terminals," "Potential Reservation Systems," "Possible Fare Structure Changes," and other issues that we hope you will weigh in on. To voice your opinion on these issues, please join the Ferry Riders' Opinion Group (F.R.O.G) by going to the following web site:

<http://www.ferryridersopiniongroup.com/public>

Sincerely,

Carol Moser, Chairman  
Washington State Transportation Commission

Office Use Only:	<input type="checkbox"/> Sea/Bain	<input type="checkbox"/> Ptt/Key	<input type="checkbox"/> Muk/Clint	<input type="checkbox"/> Edm/King
	<input type="checkbox"/> Faun/Vas/South	<input type="checkbox"/> Ana/San	<input type="checkbox"/> Inter Island	

### SUMMER TRAVEL ACTIVITY

S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer Schedule period, June 20 – September 25, 2010.

For the routes shown below, how many round trips (two one-way trips = one round trip) per month have you taken, or will you take, on average, during the summer schedule period (6/20-9/25/10)?

S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes (e.g., camping trip, visiting friends, concerts, sporting events, etc.)?

	# of round trips	# of commuting trips for work or school	# of recreational and social trips
A. Seattle/Bainbridge			
B. Seattle/Bremerton			
C. Point Defiance/Tahlequah			
D. Edmonds/Kingston			
E. Fauntleroy/Vashon			
F. Fauntleroy/Southworth			
G. Southworth/Vashon			
H. Port Townsend/Keystone			
I. Mukilteo/Clinton			
J. Anacortes/San Juan Islands			
K. San Juan Interisland			
L. Anacortes / Sydney			



# Questionnaire (cont.)

S3 During this summer period (6/20-9/25/10) have you taken, or will you take, a trip on the ferry system for any of these purposes?

- Personal business / activity (such as medical appoints/shopping)
- Tourism / recreation (camping / hiking / vacationing)
- Travel to / from special event (such as a concert or sporting event)
- Travel to / from to see family / friends
- Other → *Please specify* \_\_\_\_\_

S4 Compared to 2009, has the number of your special event (i.e. ball games/concerts/etc.) trips where you used the ferries increased, stayed the same, or decreased?

- 3 Increased
- 2 Stayed the same
- 1 Decreased
- 8 Not applicable

S5 Compared to 2009, has the number of your social (i.e. see friends/family/etc.) trips where you used the ferries increased, stayed the same, or decreased?

- 3 Increased
- 2 Stayed the same
- 1 Decreased
- 8 Not applicable

**PLEASE ANSWER THIS SECTION IF YOU TOOK ONE OF MORE RECREATIONAL/SOCIAL TRIPS**

R1 Thinking just about the trips you take for recreational purposes, has the number of your recreational trips where you used the ferries increased, stayed the same or decreased as compared to 2009?

- 3 Increased
- 2 Stayed the same
- 1 Decreased

R2 Why is that?

---



---

R3 For the next few questions please focus on your most recent recreational or social trip (If you are on a recreational or social trip today, that would be this trip). In which month did you take your most recent recreational or social trip using the Washington State Ferries?

- |                                   |                                 |                                    |
|-----------------------------------|---------------------------------|------------------------------------|
| <input type="checkbox"/> January  | <input type="checkbox"/> May    | <input type="checkbox"/> September |
| <input type="checkbox"/> February | <input type="checkbox"/> June   | <input type="checkbox"/> October   |
| <input type="checkbox"/> March    | <input type="checkbox"/> July   | <input type="checkbox"/> November  |
| <input type="checkbox"/> April    | <input type="checkbox"/> August | <input type="checkbox"/> December  |

R4 What was the route that you rode for your most recent recreational or social trip?

- |                                                   |                                                     |
|---------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Seattle/Bainbridge       | <input type="checkbox"/> Southworth/Vashon          |
| <input type="checkbox"/> Seattle/Bremerton        | <input type="checkbox"/> Port Townsend/Keystone     |
| <input type="checkbox"/> Point Defiance/Tahlequah | <input type="checkbox"/> Mukilteo/Clinton           |
| <input type="checkbox"/> Edmonds/Kingston         | <input type="checkbox"/> Anacortes/San Juan Islands |
| <input type="checkbox"/> Fauntleroy/Vashon        | <input type="checkbox"/> San Juan Interisland       |
| <input type="checkbox"/> Fauntleroy/Southworth    | <input type="checkbox"/> Anacortes/Sydney           |

R5 Which of the following best describes how you boarded the ferry on your most recent recreational or social trip? (*Please Select ONE*)

- Auto / small SUV / small pick-up (under 20 feet)
- Full-size auto/SUV, 20 feet or over (e.g., Chevy Tahoe)
- Mini-van
- RV, auto, or pick-up and trailer or boat (30 feet and over)
- RV, auto, or pick-up and trailer or boat (under 30 feet)
- Truck (commercial, panel, tractor/trailer)
- Vanpool
- Motorcycle
- Bicycle
- Walked on
- Other → *Please specify* \_\_\_\_\_



# Questionnaire (cont.)

R6 **IF YOU BOARDED USING A VEHICLE** → Were you the driver or a passenger?

- Driver
- Passenger
- Did both

R7 Thinking of your most recent recreational or social trip using Washington State Ferries (WSF), what was the duration (# of days from when you left home to when you returned home) of the trip?

RECORD: \_\_\_\_\_ # of days

- 97 Don't remember the number of dates, but it was this summer
- 88 Didn't take a trip for recreational purposes

R8 On your most recent recreational or social trip using Washington State Ferries (WSF), how many crossings or sailings did you take?

- One crossing/single sailing (just used a ferry in one direction)
- Two crossings on the same route/multiple sailings (out & back on the same ferry route)
- Two crossings on different routes/multiple sailings (out & back on different ferry routes)
- Haven't decided how we are returning (might drive/might take the ferry)

R9 Which of the following best describes your most recent recreational or social trip? *Please Select All That Apply*

- Camping / Backpacking (overnight stay)
- Visiting Family / Friend's home
- Going to your vacation home
- Going to a hotel / B&B / Rental / etc.
- Sightseeing / hiking trip (didn't stay overnight)
- Other → *Please specify* \_\_\_\_\_

R10 Was your most recent recreational or social trip part of a ...

- Washington State only trip
- Multi-State Trip /Multi-nation trip

R11 How significant was the ferry fare to the total cost (gas / food / lodging / etc.) of your most recent recreational or social trip?

- The ferry fare accounts for 25% or more of total trip cost
- The ferry fare accounts for 10-25% of total trip cost
- The ferry fare accounts for less than 10% of total trip cost

R12 Which of the following reasons best describes why you chose Washington state ferries rather than some other way to make your most recent recreational or social trip? *Please check below your most important reason and your second most important reason.*

Most important reason	Second most important reason	<i>Please check only ONE answer per column</i>
<input type="checkbox"/>	<input type="checkbox"/>	Fastest way / direct way
<input type="checkbox"/>	<input type="checkbox"/>	Price
<input type="checkbox"/>	<input type="checkbox"/>	I would rather not drive
<input type="checkbox"/>	<input type="checkbox"/>	Uniqueness of the ferry experience
<input type="checkbox"/>	<input type="checkbox"/>	Relaxing way to travel
<input type="checkbox"/>	<input type="checkbox"/>	No reasonable alternative / only way
<input type="checkbox"/>	<input type="checkbox"/>	Other [Please specify: _____]

R13 How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...

- Definitely Would → GO TO R15
- Probably Would → GO TO R15
- Probably Would Not
- Definitely Would Not

R14 Why would you not consider using the Washington State Ferries again?

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# Questionnaire (cont.)

R15 Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips that people, like you, make in a year?

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R16 During the Summer Season (June 20 – September 25, 2010), do you feel that Washington State Ferries is...

- A very good value;
- A good value;
- A poor Value; or
- A very poor Value
- Don't know

R17 As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider / multi-ride card holder, or not?

- Yes
- No → SKIP TO Tariff issues (T1)

R18 As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the summer season (June – September) than during the winter season (Oct-May)?

- Yes
- No → SKIP TO Tariff issues (T1)

R19 As a general policy, would you support or oppose WSF charging an additional 10% over the current summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait time?

- Strongly favor
- Somewhat favor
- Neither favor or oppose
- Somewhat oppose
- Strongly oppose

## TARIFF ISSUES

T1 Currently, when fuel prices go higher than what was funded in the State budget, the extra cost of fuel is often paid for by taking money away from other planned transportation activities statewide.

How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?

- Very supportive
- Somewhat supportive
- Neutral
- Somewhat against
- Very against
- No opinion/couldn't say

T2 If a fuel surcharge were implemented and a cap was needed to limit how high it could go, which of these do you feel would be the best way to set a maximum amount on the surcharge?

- There should be no maximum amount; the surcharge should cover the extra cost of fuel
- It should be capped at 20% of the fare regardless of how much it covers extra fuel costs
- It should be capped at \$5 above the base fare regardless of how much it covers extra fuel costs
- Don't know/not sure

T3 If a fuel surcharge were implemented and these were your three options, which of these do you feel would be the most appropriate way for the surcharge to be applied?

- Apply it to **ONLY** single-trip fares (discounted multiple fares would not be charged the surcharge)
- Apply it across all fares TYPES (on single/multi fare for both vehicle & passenger & walk-on) equally
- Apply it to vehicles only (on both single and discounted multiple vehicle fares)
- Don't know/not sure



# Questionnaire (cont.)

## RESERVATION SECTION

RS1 Washington State Ferries is considering a Vehicle Reservation System that would allow people to call ahead or go on-line to make a reservation for a specific trip.

The reservation system would have the following features:

- A certain number of reserved space for vehicles would be set aside on each boat for advance reservations.
- Customers would pay a non-refundable deposit to make a reservation.
- If a reservation customer does not arrive within 15 minutes of sailing their space would be released for general boarding and they would forfeit the deposit.
- Some space would be available for reservations several months ahead of travel and some space would only be available for reservation closer to departure time.
- Frequent users would be able to conveniently reserve multiple trips with one visit to the reservation system.
- The reservation system would inform people on how much capacity is reserved and how much is available for reservation.
- During peak times up to 90% of vessel capacity would be available for reservation.

Based on the information above would you favor or oppose WSF offering the above vehicle reservation program?

- Strongly favor
- Somewhat favor
- Somewhat oppose
- Strongly oppose
- Don't know/would need more information

RS2 If the vehicle reservation system described was offered, how often would you take advantage of the system to reserve a guaranteed space on the ferry for your vehicle at a specific boarding time? (Please select one)

- Every time you drive on the ferry
- Frequently (once or twice per week)
- Occasionally (Once or twice a month)
- Rarely (A few times per year)/Recreation trips only
- Never
- Only in an emergency
- Other → Please specify \_\_\_\_\_

RS3 Washington State Ferries are considering including the following features in the reservation system. For each item, please rate how important it is that that feature is included. Please use a scale where 1 is "not important" and 5 is "very important."

	Not imp.					Very imp.
		1	2	3	4	
A.	Having a maximum of 90% of a boat's capacity available for reservations during peak travel periods	<input type="checkbox"/>				
B.	Having a minimum of 50% of a boat's capacity available for reservations during off-peak periods	<input type="checkbox"/>				
C.	Reservations on peak commuter sailings would be available <u>four weeks in advance</u>	<input type="checkbox"/>				
D.	Reservations on non-commuter sailings would be available <u>six months in advance</u>	<input type="checkbox"/>				
E.	Some reserved boat space would be available specifically for regular commuters	<input type="checkbox"/>				
F.	Some reserved boat space would be available specifically for commercial traffic	<input type="checkbox"/>				
G.	Customers would need to arrive 15 to 30 minutes in advance to guarantee their reservation	<input type="checkbox"/>				
H.	During peak periods, a customer arriving late would lose their reservation, however they would be redirected to the stand-by line	<input type="checkbox"/>				
I.	Enhanced information system and signage regarding current ferry system operating conditions would be available before you get to a terminal	<input type="checkbox"/>				



# Questionnaire (cont.)

## OUT-OF-STATE SURCHARGE

OS1 There are many public services (such as golf courses, public pools, parks, etc.) where Washington State residents pay a lower fee than non-residents even for occasional use.

However, imposing non-resident fees can negatively impact out of state tourism. Also, non-resident riders as well as in-state infrequent ferry riders typically pay the highest single trip fare already during the peak summer season. Based on this information, which of these statements best describes how you would feel about introducing higher fares for out-of-state ferry passengers?

- I think non-Washington state residents should be charged higher fares than single trip fares
- I Do not think non-Washington state residents should be charge anymore than residents pay for a single trip fare → *Skip to next section – Other Topics*
- No opinion/couldn't say → *Skip to next section – Other Topics*

OS2 What percent more should non-Washington state residents be charged than residents for ferry travel?

\_\_\_\_\_ % → *An estimate is fine*

OS3 Introducing higher fares for out-of-state ferry passengers could add to wait times at the toll booth to verify each rider's place of residence. How supportive would you be of this type of program given that extra time could be needed at the toll booth to verify residency?

- Very supportive
- Somewhat supportive
- Neutral
- Somewhat against
- Very against
- No opinion/couldn't say

## OTHER TOPICS

O1 When considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision? → *Please select all that apply*

O2 Which is the most important factor? → *Please select only one*

Q16 - Factors	Q17- Most important	
		Long lines waiting to catch a ferry (so I drive around)
		Heavy traffic congestion on the drive around roads (so I take ferry)
		Lower cost to drive around
		Lower cost to take ferry
		Faster travel time to drive around
		Faster travel time to take ferry
		Enjoyment of trip (so I take ferry)
		Enjoyment of trip (so I drive around)
		Other → <i>Please specify</i>
		Driving around is not a feasible option for me

O3 Which of the following do you use to obtain information about Washington State Ferries? → *Please check all that apply*

- Family/friends
- Other ferry riders
- TV/Radio/Newspapers
- The WSF website
- Weekly e-mail updates from WSF's executive director, David Moseley
- Email alerts
- Radio traffic reports
- WSDOT website
- Other → *Please specify* \_\_\_\_\_



# Questionnaire (cont.)

Q4 Which of the following, if it were available, would you use to obtain information about Washington State Ferries? → Please check all that apply

- A Washington State Ferries blog
- Following Washington State Ferries on Twitter
- Text messages from Washington State Ferries
- A Washington State Ferries Facebook or MySpace page
- Highway advisory radio
- Other → Please specify \_\_\_\_\_

### WASHINGTON STATE FERRIES

WS1 We'd like to know how important some different aspects of the Washington State Ferries are to you, and how satisfied you are with these. Please rate how important each of the following items are to you, and how satisfied you currently are with each.

	1	2	3	4	5	7
<i>Importance</i>	Not Important ←————→ Very Important					Don't know
<i>Satisfaction</i>	Dissatisfied ←————→ Very Satisfied					
<b>Shorter arrival time before sailing</b> (how far ahead of the sailing you need to arrive to insure you can get on that particular boat)						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>On-time departures</b> (within 5 minutes of schedule)						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>On-board amenities and services</b>						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Telephone customer service</b> (customer support you receive when you call WSF)						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Interactions with terminal personnel</b> (tollbooth and dock personnel)						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	1	2	3	4	5	7
<i>Importance</i>	Not Important ←————→ Very Important					Don't know
<i>Satisfaction</i>	Dissatisfied ←————→ Very Satisfied					
<b>Interactions with vessel personnel</b>						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cleanliness of the vessels</b>						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>WSF website</b>						
<i>Importance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Satisfaction</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WS2 Do you believe that the loading and unloading process could be done better or more efficiently?

- 1 Yes – it could be done better/more efficiently
- 2 A few bumps, but basically it was okay
- 3 No problems – it is as efficient as could be expected → Go to WS5

WS3 What could they have done to make it better or more efficient?

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# Questionnaire (cont.)

WS4 At what terminal(s) would you say loading and unloading could be done better?

ROUTE	TERMINALS	
Seattle/Bainbridge	<input type="checkbox"/> Seattle	<input type="checkbox"/> Bainbridge
Seattle/Bremerton	<input type="checkbox"/> Seattle	<input type="checkbox"/> Bremerton
Pt. Defiance/Tahlequah	<input type="checkbox"/> Point Defiance	<input type="checkbox"/> Tahlequah
Edmonds/Kingston	<input type="checkbox"/> Edmonds	<input type="checkbox"/> Kingston
Fauntleroy/Vashon	<input type="checkbox"/> Fauntleroy	<input type="checkbox"/> Vashon
Fauntleroy/Southworth	<input type="checkbox"/> Fauntleroy	<input type="checkbox"/> Southworth
Southworth/Vashon	<input type="checkbox"/> Southworth	<input type="checkbox"/> Vashon
Pt Townsend/Keystone	<input type="checkbox"/> Port Townsend	<input type="checkbox"/> Keystone
Mukilteo/Clinton	<input type="checkbox"/> Mukilteo	<input type="checkbox"/> Clinton
Anacortes/San Juan Islands	<input type="checkbox"/> Orcas <input type="checkbox"/> Shaw <input type="checkbox"/> Lopes	<input type="checkbox"/> Anacortes
San Juan Interisland	<input type="checkbox"/> Orcas	<input type="checkbox"/> Lopes
	<input type="checkbox"/> Shaw	<input type="checkbox"/> Friday Harbor
Anacortes / Sydney	<input type="checkbox"/> Anacortes	<input type="checkbox"/> Sydney

WS5 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.

- Galley service
- Vending machines
- Information center (racks with brochures)
- None of the above

WS6 How satisfied are you with the following three aspects of the galley?

	Very Dissatisfied ←————→ Very Satisfied					Don't Use
	1	2	3	4	5	
A. The variety of products offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. The quality of the products sold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. The price charged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WS7 How satisfied are you with the following three aspects of the vending machines?

	Very Dissatisfied ←————→ Very Satisfied					Don't Use
	1	2	3	4	5	
A. The variety of products offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. The quality of the products sold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. The price charged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WS8 How satisfied are you with the information provided in the information center (rack with brochures)?

Very Dissatisfied				Very Satisfied		Don't Use
1	2	3	4	5		
<input type="checkbox"/>						

WS9 Thinking of your summer non-commuting travels on the ferry, what, if any, services or amenities would you like to see offered that would make your non-commuting ferry usage more enjoyable?

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# Questionnaire (cont.)

## YOUR MOST RECENT FERRY TRIP

RT1 What was the last route that you rode?

<input type="checkbox"/> Seattle/Bainbridge	<input type="checkbox"/> Southworth/Vashon
<input type="checkbox"/> Seattle/Bremerton	<input type="checkbox"/> Port Townsend/Keystone
<input type="checkbox"/> Point Defiance/Tahlequah	<input type="checkbox"/> Mukilteo/Clinton
<input type="checkbox"/> Edmonds/Kingston	<input type="checkbox"/> Anacortes/San Juan Islands
<input type="checkbox"/> Fauntleroy/Vashon	<input type="checkbox"/> San Juan Interisland
<input type="checkbox"/> Fauntleroy/Southworth	<input type="checkbox"/> Anacortes / Sydney

RT2 From which terminal did you depart on your most recent trip?

ROUTE	TERMINALS		
Seattle/Bainbridge	<input type="checkbox"/> Seattle	<input type="checkbox"/> Bainbridge	
Seattle/Bremerton	<input type="checkbox"/> Seattle	<input type="checkbox"/> Bremerton	
Pt. Defiance/Tahlequah	<input type="checkbox"/> Point Defiance	<input type="checkbox"/> Tahlequah	
Edmonds/Kingston	<input type="checkbox"/> Edmonds	<input type="checkbox"/> Kingston	
Fauntleroy/Vashon	<input type="checkbox"/> Fauntleroy	<input type="checkbox"/> Vashon	
Fauntleroy/Southworth	<input type="checkbox"/> Fauntleroy	<input type="checkbox"/> Southworth	
Southworth/Vashon	<input type="checkbox"/> Southworth	<input type="checkbox"/> Vashon	
Pt Townsend/Keystone	<input type="checkbox"/> Port Townsend	<input type="checkbox"/> Keystone	
Mukilteo/Clinton	<input type="checkbox"/> Mukilteo	<input type="checkbox"/> Clinton	
Anacortes/San Juan Islands	<input type="checkbox"/> Orcas	<input type="checkbox"/> Shaw	<input type="checkbox"/> Lopes
	<input type="checkbox"/> Friday Harbor	<input type="checkbox"/> Anacortes	
San Juan Interisland	<input type="checkbox"/> Orcas	<input type="checkbox"/> Lopes	
	<input type="checkbox"/> Shaw	<input type="checkbox"/> Friday Harbor	
Anacortes / Sydney	<input type="checkbox"/> Anacortes	<input type="checkbox"/> Sydney	

RT3 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?

- Commute to / from work
- Commute to / from school
- Work related activity / business
- Personal business / activity
- Medical appointment
- Everyday shopping
- Shopping excursion
- Tourism / recreation
- Travel to / from special event
- Travel to / from to see family / friends
- Other → Please specify \_\_\_\_\_

RT4 Thinking about your LAST FERRY RIDE ONLY, were you the vehicle driver, a passenger in a vehicle, or did you walk onto the ferry? (if you boarded differently coming and going, mark both below)

- Vehicle driver
- Passenger in a vehicle
- Walk-on
- Rode on in bus/transit
- Rode on in van/car pool
- Rode on – motorcycle
- Biked on
- Other → Please specify \_\_\_\_\_

RT5 What date and approximate time did you board the ferry on your most recent/current trip?

DATE: \_\_\_\_/\_\_\_\_/2010  
Month / Day

TIME: \_\_\_\_:\_\_\_\_ AM/PM  
Hour : Minutes



# Questionnaire (cont.)

RT6 Thinking about the your most recent/current trip, what kind of ticket were you travelling on?

- Single ride ticket
- Multi-ride frequent user ticket (available to all passengers & non-oversized vehicles)
- Monthly pass (not available to vehicle drivers)
- Senior/disabled Convenience Card/discount
- SmartCard/ORCA (One Regional Card for All)
- Puget Pass
- Other → Please specify \_\_\_\_\_

RT7 Which of the following best describes how you boarded the ferry on your most recent/current trip? (Check one)

- Auto / small SUV / small pick-up (under 20 feet)
- Full-size auto/SUV, 20 feet or over (e.g., Chevy Tahoe)
- Mini-van
- RV, auto, or pick-up and trailer or boat (30 feet and over)
- RV, auto, or pick-up and trailer or boat (under 30 feet)
- Truck (commercial, panel, tractor / trailer)
- Vanpool
- Motor cycle
- Bicycle
- Walked on
- Other → Please specify \_\_\_\_\_

## GENERAL FERRIES QUESTIONS

P1 How many years have you been riding the ferries?

- This was the first time I have ever ridden
- Less than one year
- 1 year, but less than 3 years
- 3 years, but less than 6 years
- 6 years, but less than 10 years
- More than 10 years

P2 Since you started riding the ferries, has the frequency with which your ride...

Increased Significantly	Increased Somewhat	No change at all	Decreased Somewhat	Decreased Significantly
<input type="checkbox"/>				

P3 Overall, how satisfied are you with Washington State Ferries?

- Extremely satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Extremely dissatisfied

P4 Washington State Ferries is currently both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a People-Mover (vehicles are secondary) or a Vehicle-Mover (people are secondary) system?

Strongly think it should invest in being a PEOPLE-MOVER system			Invest Equally	Strongly think it should invest in being a VEHICLE-MOVER system		
7	6	5	4	3	2	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Questionnaire (cont.)

## DEMOGRAPHICS

D1 Approximately how many miles do you live from the ferry terminal?

RECORD: \_\_\_\_\_

D2 What is your home zip code?

RECORD: \_\_\_\_\_

D3 What is your current employment status?

- Employed full-time
- Employed part-time
- Student and employed
- Student and not employed
- Military personnel
- Retired
- Homemaker
- Not currently employed
- Other → *Please specify* \_\_\_\_\_
- Prefer not to answer

D4 If employed, in which of the following industries do you work?

- Agriculture, Forestry, And Fishing
- Mining
- Construction
- Manufacturing
- Transportation, Communications, Electric, Gas, And Sanitary Services
- Wholesale Trade
- Retail Trade
- Finance, Insurance, And Real Estate
- Services
- Public Administration
- Washington State Ferry (WSF)
- Other → *Please specify* \_\_\_\_\_

D5 Which of the following ranges best describes your total annual household income before taxes?

- Under \$15,000
- \$15,000 to \$24,999
- \$25,000 to \$34,999
- \$35,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer not to answer

D6 Gender

- Male
- Female

D7 Date of birth: Month: \_\_\_\_\_ Year: \_\_\_\_\_



# Questionnaire (cont.)

Additional Comments - Please provide any additional feedback you might have here:

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**Thank you for your help!** - Please provide your name and contact information so we can contact you in case we have questions about your answers.

NAME: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

PHONE (area code & number): \_\_\_\_\_

Fold in half and staple shut; then drop in the mail.  
(Or hand back to any survey crew member)



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## Appendix B: Weighting



# Weighting Methodology

- ❖ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken. The weighting scheme used for combining the summer and winter surveys is displayed below.

COMBINED TOTALS	SUMMER			WINTER		
Route	Vehicle	Passenger	Walk on	Vehicle	Passenger	Walk on
SEA/BAIN	1.377799	3.534740	1.872741	0.872116	2.467034	0.753372
SEA/BRE	1.351567	1.961791	1.578863	0.596082	1.358534	0.827055
PTD/TAH	1.073389	4.473459	2.378716	0.516909	2.238806	1.190188
EDM/KIN	1.023894	2.394667	0.816144	0.882306	2.147094	0.578334
FAU/VAS	1.151068	2.948851	1.387032	0.729451	1.537588	0.783336
FAU/SOU	0.764257	1.260301	0.702363	0.460920	1.027585	0.337037
SOU/VAS	1.306883	0.190605	1.805085	0.659211	1.000000	1.050569
PTT/KEY	0.357102	0.770358	0.284024	0.438303	2.065434	0.492000
MUK/CLI	0.793058	1.857295	0.780296	0.616250	1.496731	0.512221
ANA/SAN	0.512354	1.382384	1.079645	0.340319	0.924577	0.591755
INTER SJI	0.798548	6.794624	0.147709	0.760296	1.592316	0.086582
ANA/SYD	1.754777	15.731984	3.528744	--	--	--



# Weighting Methodology

- ❖ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken. The weighting scheme used for the summer and winter surveys, individually, is displayed below.

INDIVIDUAL TOTALS	SUMMER			WINTER		
Route	Vehicle	Passenger	Walk on	Vehicle	Passenger	Walk on
SEA/BAIN	1.140474	2.925885	1.550163	1.122807	3.200000	0.989858
SEA/BRE	1.118761	1.623874	1.306905	0.670051	1.306122	1.006231
PTD/TAH	0.888499	3.702910	1.968984	0.675676	2.909091	1.230769
EDM/KIN	0.847529	1.982188	0.675564	1.162162	2.823529	0.750000
FAU/VAS	0.952798	2.440914	1.148117	0.953782	2.000000	1.020408
FAU/SOU	0.632614	1.043216	0.581382	0.605096	1.333333	0.444444
SOU/VAS	1.081774	0.157773	1.494161	0.863636	0.000000	1.333333
PTT/KEY	0.295592	0.637664	0.235101	0.567568	2.727273	0.619048
MUK/CLI	0.656455	1.537378	0.645890	0.812500	1.974359	0.673611
ANA/SAN	0.424101	1.144270	0.893677	0.400000	1.112676	0.529412
INTER SJI	0.660999	5.624257	0.122266	1.000000	2.000000	0.130435
ANA/SYD	1.452518	13.022165	2.920921	--	--	--