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Fare Strategies Survey

Summary Report

Part of the Washington State Transportation Commission 2010 Ferry Research Initiative

Washington State Transportation Commission

Conducted by

Market Decisions Corporation

April 2011

Preface

- In 2010, the Washington State Transportation Commission (WSTC) changed the process for 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. 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 consists of the following main phases:
  - Spring Customer Survey (target audience: ferry riders)
  - Mode Shift and Elasticity of Demand Research (target audience: ferry riders)
  - Freight Survey (target audience: freight customers)
  - General Market Assessment Survey (target audience: general public)
  - Summer Customer Survey (target audience: ferry riders)
  - Capital Funding (target audience: ferry riders)
  - Fare Strategies Survey (target audience: ferry riders)
- The focus of this report is the Fare Strategies survey.
  - A comprehensive report of all phases prior to this survey has been provided in January 2011.
- 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.

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Methodology

- The following report presents the findings for the 2011 Fare Strategies survey. The main objective of this research is to understand ferry riders' support and preference for several potential strategies that may be implemented in order to help WSF overcome current budget shortfalls. Specific attention is paid to strategies that may be applied to fares – ticket pricing, surcharges, peak/off-peak congestion strategies, etc.
- Only those ferry riders who are members of F.R.O.G. (Ferry Riders' Opinion Group) were asked to complete the online survey.
  - The survey was conducted between March 18 and April 4, 2011.
- A total of 2,062 online surveys were received, resulting in a maximum sampling variability of +/-2.2% at the 95% confidence level.
  - Any differences noted throughout the report are proven to be statistically different at the 95% confidence level or higher.
- Data were weighted by route to ensure results are proportionate to overall ferry ridership.
  - Information regarding specific weighting methods can be found at the end of this report.
- Significant differences between routes (only noted when significantly different from roughly half of all other routes/at least 5 other routes) are highlighted by a blue outline.
  - When data is detailed by route, the most commonly selected response for each individual route is **bolded**.
- Due to a programming error, just more than half (56%) of respondents were captured with their F.R.O.G identification, allowing demographic information to be appended.
  - For this reason, legislative district and demographic data is shown with reduced sample size, where applicable.
  - Analysis of those with and without F.R.O.G identification found no statistical differences, and thus the appended legislative district and demographic information should be projectable to the total sample.
  - Only those legislative districts with statistically meaningful (n=30+) are detailed.

Executive Summary

Budget Shortfall

- When asked to manipulate four variables in order to close the annual $210 million funding gap, F.R.O.G. members (also referred to in this report as "respondents" or "riders") relied heavily on increasing the state's gas tax, on average proposing that 76% come from this source. The four available sources included:
  - Fare increases
  - Service reductions
  - State-wide gas tax increases
  - Ferry-served community household taxes
- 31% Support a state-wide gas tax increase of 6 cents.
  - Nearly one third (28%) support a $0.07 gas tax increase - the level that covers the entire shortfall – with no fare increases, service reductions, or local taxes.
- The average fare increase proposed by respondents to aid in closing the annual funding gap is 14%.
  - Those last traveling on a multi-ride ticket propose lower fare increases than riders traveling on other ticket types, giving an average increase of 9%.
- The average level of service reduction proposed by respondents is 4%;
  - However, 24% support reductions of 10%, the highest level offered in the survey (suggesting that a higher level of reductions may have been acceptable).
- 39% feel that the budget shortfall should not be funded from fare increases, and 47% feel that service reductions should not be used.
  - 35% said "No" to both fare increases and service reduction sources as a way to close the annual shortfall.
- 61% of the respondents would support some level of a local ferry-served community tax. On average, a $14 per household community tax was implemented.

Executive Summary *(cont.)*

Taxes, Surcharges & Rate Increases

- More than half (57%) of all riders would support charging an additional $0.25 for vehicle or walk-on/passenger fares, if the money collected were dedicated for capital improvements.
  - However, just 26% support charging an additional $1.00 per fare for the same purpose.
  - In general, vehicle drivers tend to be more likely to support additional charges for vehicle or walk-on/passenger fares than those walking onto the ferry.
- 22% say they would support extending the summer surcharge period to include the months of April – October.
  - Another 24% say they would *'strongly oppose'* extending the summer surcharge period.
  - Additionally, 47% indicate they would *'strongly oppose'* applying the summer surcharge to multi-ride tickets.
- Riders do not feel that fares should be higher for those vehicle drivers traveling during peak times in order to manage demand, as nearly two thirds (64%) oppose this plan.
- The majority (69%) of riders believe the current fare structure, with passenger fares being 30% of vehicle fares on most routes, is appropriate.
  - 25% feel that this percentage (relationship between vehicle and passengers fares) should be lower than 30%.
- While about half (52%) believe any increases in fares should be applied equally between vehicle and walk-on tickets, 45% feel that vehicle ticket prices should be increased at a higher rate than passenger/walk-on fares.
  - Of the respondents who would want to see vehicle fares increasing more than passenger/walk-on fares, the majority (60%) believe the passenger/walk-on fares should increase at ¼ the rate of the vehicle/driver fare.
  - Vehicle drivers (62%) are significantly more likely than those walking onto the ferry (29%) to believe fares should increase at the same rate for drives and walk-on riders.

Executive Summary *(cont.)*

Additional Topics

- Response is lukewarm for a single electronic payment card to pay tolls on roads, transit fares, HOT lanes, and ferry fares, with 22% rating their support level at "6" or "7" on the 7-point scale.
  - Among riders last using a regular ticket, 35% give ratings of "6" or "7", compared to 16% of those traveling on multi-ride tickets and 21% of those using other ticket type .
  - Additionally, 38% indicate they would not support the implementation of such a system (support ratings of "1" or "2").
- In general, support is slightly higher for a graduated vehicle pricing system (*see definitions of graduated three tiered vehicle pricing system below) than one based on the length and width of the vehicle.
  - 39% would support the graduated three tiered vehicle pricing system, while 32% would support a vehicle pricing system based on actual measurement of a vehicle's length and width.
- 37% support charging a flat vehicle fare, regardless of the number of occupants.
- 36% indicate they would be more likely to walk onto the ferry and use transit connections if they received a discount on both fares by using their ORCA card.
- In general, riders last traveling on a multi-ride ticket are significantly less likely than those using single-ride or other tickets to support changes in how fares are charged, including:

	Multi	Regular	Other
The addition of a summer surcharge to multi-ride tickets	6%	29%	18%
Charging higher fares for drivers during peak travel times	29%	46%	40%
Any fare percentage increase that is greater for vehicles than passengers/walk-ons	37%	44%	58%
Charging a flat vehicle fare regardless of the number of passengers	33%	40%	39%
Creating a single electronic payment card for multiple travel uses	16%	28%	26%

***Vehicles between…**

- 22' to 30' feet are charged 50% MORE than the current regular vehicle/driver fare
- 14' to fewer than 22' feet are charged the current regular vehicle/driver fare
- Less than 14' are charged 25% LESS than current regular vehicle/driver fare

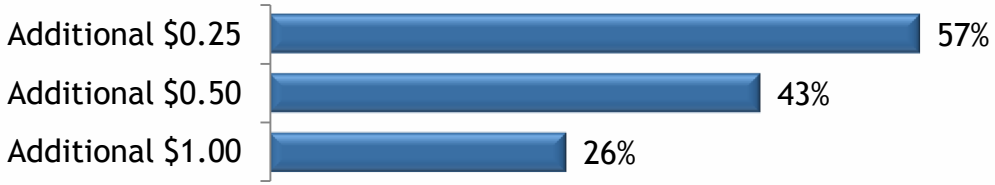
Detailed Study Findings

Additional Charges

- Over half (57%) of all respondents say they would support an additional $0.25 charge for vehicle or walk-on/passenger fares if the monies collected were dedicated for ferry capital improvements.
- On average, 14% more of those last traveling on a regular ticket (23% of all respondents) support additional charges for vehicle or walk-on/passenger fares than riders using multi-ride tickets (45% of all riders).
  - On average, 5% more off-peak travelers (59% of all respondents) support increases in walk-on or passenger fares than those who last traveled during peak times (41% of all respondents).

Walk-On/Passenger Fare Increase Support

Top Box Rating (6-7; 7-pt scale)
(n=2,062)



**Caution: small sample size*

Walk-On/Passenger Fare Increase	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Additional $1.00	24%	23%	26%	27%	27%	10%	15%	24%	46%	45%	47%	**100%**
Additional $0.50	40%	41%	44%	44%	40%	50%	32%	44%	50%	56%	57%	**100%**
Additional $0.25	**54%**	**54%**	**58%**	**56%**	**57%**	**56%**	**45%**	**58%**	**64%**	**63%**	**64%**	**100%**

Q1C-A How supportive are you for charging an additional ($1.00/$0.50/$0.25) per vehicle or walk-on/passenger fare, with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals)? Doing so would generate an estimated ($16/$8/$4) million per year.

Additional Charges
By Legislative District

- In general, support for additional charges on walk-on/passenger fares, with the monies collected being dedicated for ferry capital improvements, is consistent across all legislative districts.
  - Those in legislative district 40 tend to be significantly more likely to support charging an additional $1.00 compared to those riders covered in other districts with applicable sample sizes.

Support for Walk-On/Passenger Fare Increases by Legislative District

Top Box (6-7 ratings; 7-pt. scale)

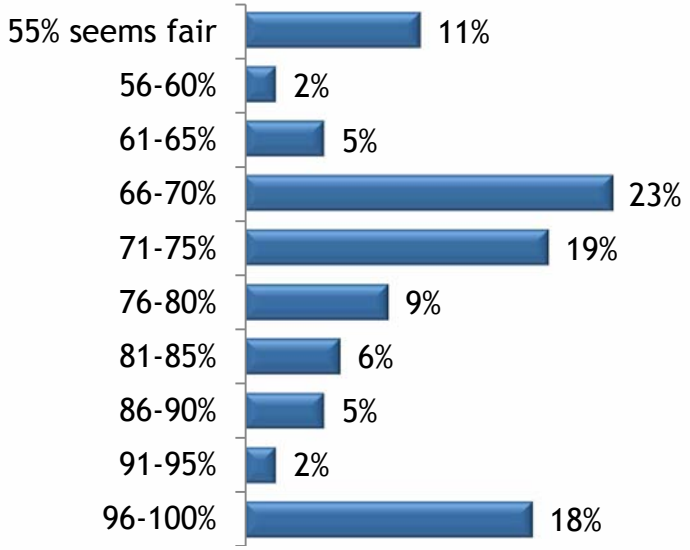
Walk-On/Passenger Fare Increase	1 n=31	10 n=193	23 n=435	24 n=88	26 n=105	34 n=124	35 n=161	36 n=33	40 n=136	43 n=46	Other n=158
Additional $1.00	33%	23%	17%	34%	24%	27%	20%	45%	44%	43%	47%
Additional $0.50	65%	38%	32%	44%	43%	41%	37%	61%	58%	57%	61%
Additional $0.25	**69%**	**54%**	**50%**	**61%**	**60%**	**52%**	**58%**	**70%**	**65%**	**65%**	**70%**

Q1C-A How supportive are you for charging an additional ($1.00/$0.50/$0.25) per vehicle or walk-on/passenger fare, with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals)? Doing so would generate an estimated ($16/$8/$4) million per year.

Sidney Route Recovery Rate

- 23% of riders feel the Sidney route should have about the same recovery rate as other WSF routes.
  - The median suggested recovery rate is 73%, compared to the WSF average of 70%.
  - 42% believe the recovery rate should fall between 66% and 75% for the Sidney route.
- In general, there are no significant differences between routes in regards to the suggested recovery rate of the Sidney run.

Suggested Sidney Route Recovery Rate
(n=2,062)



Suggested Sidney Route Recovery Rate	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	Total SJI	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Median	74%	73%	69%	74%	75%	69%	73%	74%	71%	73%	74%	72%	71%

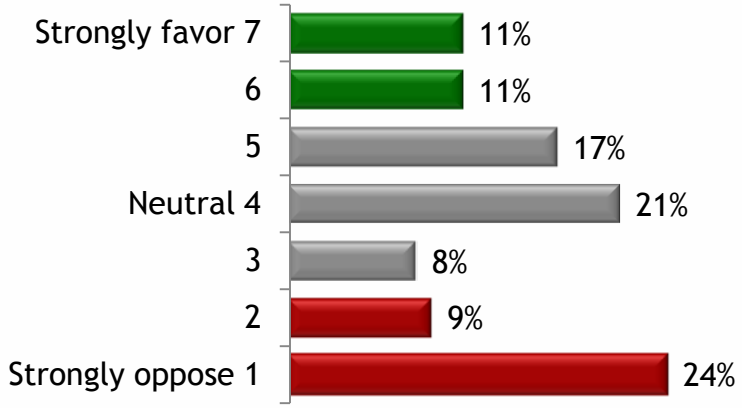
Q4 Based on this information, what operational cost recovery rate do you believe the Sidney route should have?

Summer Surcharge

- Nearly one quarter (22%) say they favor extending the summer surcharge period (April 1 to November 1) in order to raise approximately $1 million in additional annual revenues.
  - However, another one quarter (24%) said they would '*strongly oppose*' the extension of the summer surcharge period.
- 47% strongly oppose adding a summer surcharge to those travelers using multi-ride tickets.
  - Those last traveling on single-ride (29%) or other (SmartCard/ORCA, Senior, monthly pass, etc.) ticket types (18%) are significantly more likely to support applying the summer surcharge to multi-ride tickets than those riding on a multi-ride ticket (6%).
  - Less than one in five (15%) would favor the addition of a multi-ride ticket summer surcharge.

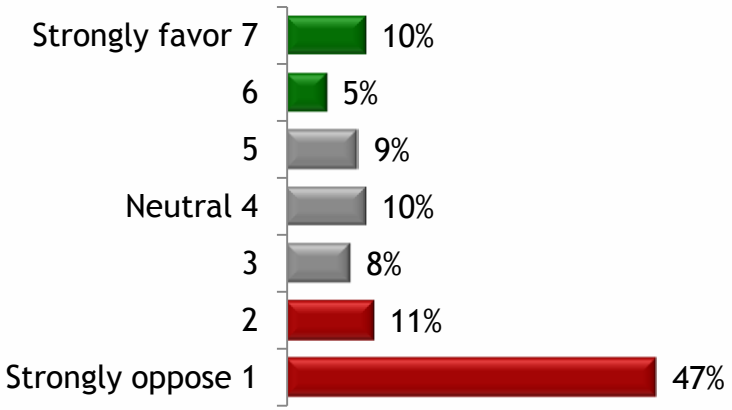
Support for Extending Summer Surcharge Period

(n=2,062)



Support Summer Surcharge for Multi-Ride Tickets

(n=2,062)



Q19 Would you favor or oppose expanding this period to go from April 1 to November 1 if doing so would raise approximately $1 million in additional revenues per year to support current service levels?

Q5 Do you favor or oppose having those summer surcharges applied to the multi-ride tickets?

Summer Surcharge - By Route

- Overall, support for extending the summer surcharge period, as well as adding a summer surcharge to multi-ride tickets, is consistent across all routes.
  - However, nearly one third (31%) of riders on the Port Townsend/Coupeville route would support applying the summer surcharge to multi-ride tickets.
  - Riders of the Fauntleroy/Vashon, Port Defiance/Tahlequah and Anacortes/San Juan Islands routes are significantly more likely than others to oppose applying the summer surcharge to multi-ride tickets.

	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Support Extending Summer Surcharge Period	**21%**	20%	**17%**	**24%**	**25%**	**13%**	**16%**	**27%**	**38%**	**27%**	**28%**	**50%**
Support Summer Surcharge for Multi-Ride Tickets	18%	**22%**	**17%**	9%	13%	10%	2%	13%	31%	7%	19%	-

Top Box Rating (6-7; 7-pt. scale)
**Caution: small sample size*

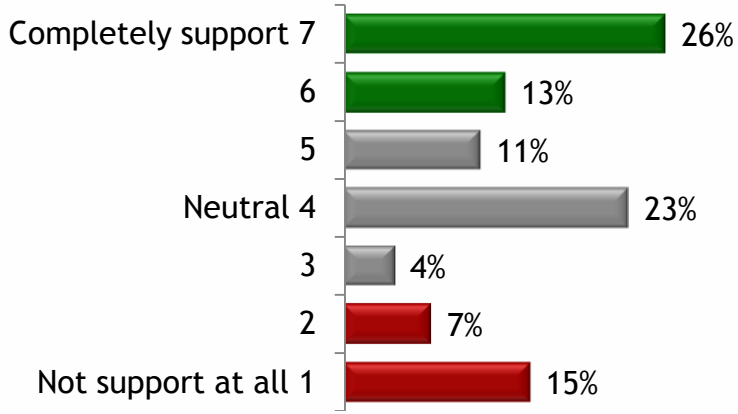
Q19 *Would you favor or oppose expanding this period to go from April 1 to November 1 if doing so would raise approximately $1 million in additional revenues per year to support current service levels?*
Q5 *Do you favor or oppose having those summer surcharges applied to the multi-ride tickets?*

Bicycle Surcharges

- 39% support the elimination of the yearly bicycle permit, allowing those who are traveling on a multi-ride or monthly pass to board without an additional fee, but increasing the single fare bicycle surcharge to offset the revenue losses.
- Responses vary greatly when riders are asked what a reasonable round trip bicycle surcharge should be if the yearly bicycle permit were eliminated.
  - 39% feel a round trip bicycle surcharge of $2.00 is reasonable for those without a multi-ride/monthly pass.
  - Additionally, riders feel a round trip bicycle surcharge of $2.00 (44%) and $3.00 (42%) is reasonable on the Anacortes/San Juan Islands route, with the fare doubling during the peak season.

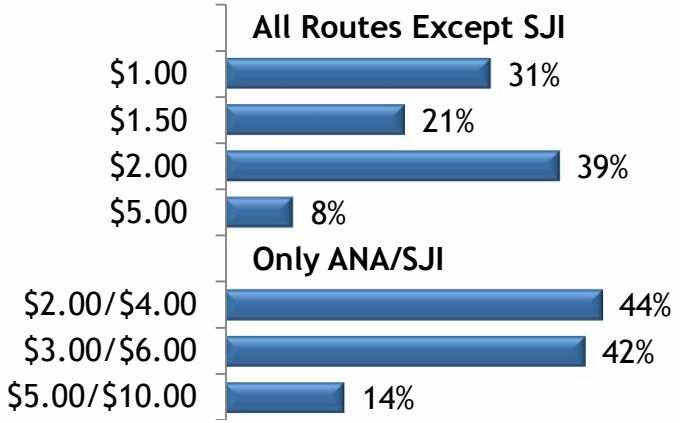
Support Eliminating Yearly Bicycle Permit

(n=2,062)



Reasonable Round Trip Bicycle Surcharges

(n=1,743)



Q6A Conceptually, how supportive are you for eliminating the yearly bicycle permit, allowing bicyclists who travel with multi-ride cards or monthly passes to take their bikes on for free, but increasing the single fare bicycle surcharge to offset the revenue losses?

Q6B-C What would you consider a reasonable fee to be for the round trip bicycle surcharge for those bicycle travelers not using a multi-ride card or monthly pass for (all routes except/just the Anacortes to) San Juan Islands?

Bicycle Surcharges - By Route

- Riders' opinions regarding bicycle fares do not vary significantly by route.

Support Eliminating Yearly Bicycle Permits	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Support	40%	33%	41%	41%	39%	24%	31%	44%	45%	42%	48%	-

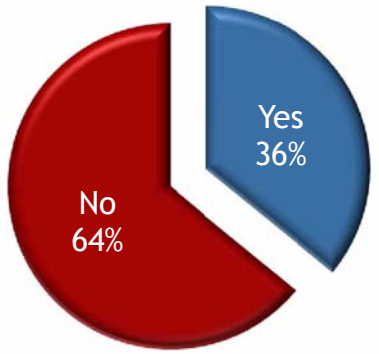
Reasonable Round Trip Bicycle Surcharges	SEA/ BAIN n=434	SEA/ BREM n=210	EDM/ KIN n=324	FAU/ VAS n=166	FAU/ SOU n=65	SOU/ VAS n=12*	PTD/ TAH n=50	MUK/ CLI n=333	PTT/ COU n=32	ANA/ SJI n=103	INTR SJI n=13*	ANA/ SID n=1*
All Routes Except SJI												
$1.00	27%	**39%**	32%	**35%**	**37%**	39%	24%	33%	39%	21%	22%	-
$1.50	22%	28%	20%	24%	24%	15%	29%	17%	9%	13%	16%	-
$2.00	**43%**	32%	**38%**	31%	33%	**46%**	**43%**	**42%**	**45%**	**49%**	**36%**	**100%**
$5.00	8%	2%	10%	11%	6%	-	4%	7%	7%	17%	27%	-
Only ANA/SJI												
$2.00/$4.00	39%	**51%**	**45%**	**45%**	**48%**	**53%**	46%	**44%**	**45%**	40%	**57%**	-
$3.00/$6.00	**44%**	41%	39%	38%	39%	47%	**52%**	43%	42%	**42%**	11%	**100%**
$5.00/$10.00	17%	8%	16%	17%	13%	-	2%	13%	13%	18%	32%	-

Top Box Rating (6-7; 7-pt. scale)
**Caution: small sample size*

Congestion & Fare Strategies

- Nearly two thirds (64%) do not feel that higher fares should be charged to peak vehicle drivers as a means of managing demand, as is the case on some other state highways.
  - Younger (18-34) riders (58%) are significantly more likely to agree peak vehicle drivers should be charged higher fares than middle-aged (35-54; 37%) or older (55+; 33%) riders.
  - There is no significant difference in the response to this question between those riders who last traveled during peak travel times and those who rode during non-peak times.
- Roughly 60% of respondents from commuter routes oppose (40% favor) higher vehicle fares during peak travel times.
  - This negative sentiment is strongest for those who last rode the Mukilteo/Clinton (69% oppose) and Fauntleroy/Vashon (71%) routes.
  - In addition, vehicle drivers (65%) are significantly more likely to oppose higher peak vehicle fares than those walking on the ferry (56%).

Agree Higher Fares for Peak Drivers
(n=2,062)



**Caution: small sample size*

Agree Higher Fares for Peak Drivers	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Yes	42%	41%	36%	29%	34%	49%	24%	31%	44%	27%	26%	**50%**
No	**58%**	**59%**	**64%**	**71%**	**66%**	**51%**	**76%**	**69%**	**56%**	**73%**	**74%**	**50%**

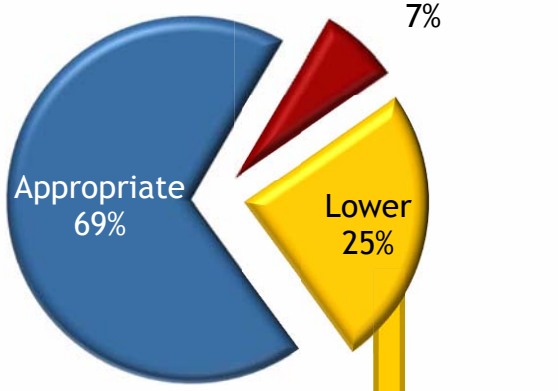
Q7 *As a way to help manage demand, do you think fares should be higher for drivers of vehicles who travel during the most congested peak hours, similar to what we are dong on some of our other state highways?*

Passenger/Vehicle Fare Relationship

- More than two thirds (69%) feel the current passenger/vehicle fare relationship (passenger fares are 30% of vehicle fares) is appropriate.
  - One third (34%) of walk-on passengers say the passenger fare should be lower than the current 30% rate, significantly more than vehicle drivers (20%).
- A quarter (25%) believe the walk-on rate should be lower. Of these riders, half (51%) feel the walk-on fare should be between 10% and 20% of the drive-on fare.
  - Just 7% believe the fares should be more closely priced. Of these, over half (56%) believe a walk-on ticket should cost between 31% and 49% of the drive-on price.

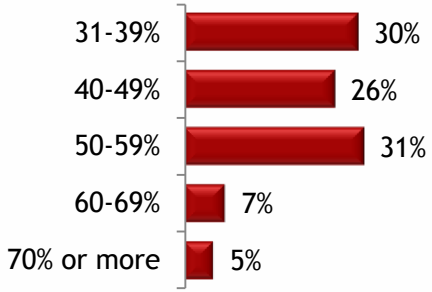
Appropriateness of Current 30% Relationship

(n=2,062)



Higher than Current

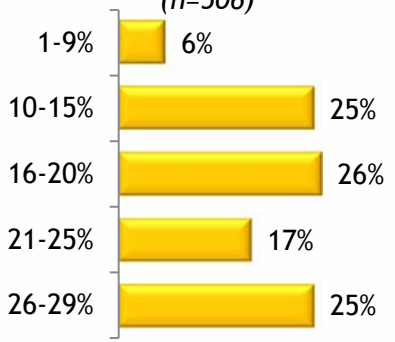
(n=140)



Mean	Median
45.4%	40%

Lower than Current

(n=506)



Mean	Median
20.2%	20%

Q8 *Currently on most WSF routes, a passenger fare is 30% of the vehicle fare. Do you think this percentage is appropriate or should it be higher or lower?*

Q9-10 *(How much lower/What percentage less) than the regular fare for vehicle & driver do you feel the passenger/walk-on fare should be?*

Fare Relationship
By Route & Legislative District

- The majority of riders feel the current 30% relationship between passenger and driver fares is appropriate.
- Riders on the Seattle/Bremerton route tend to be significantly more likely than other routes to believe the passenger fare should be priced at a lower percentage than the current 30% of the driver fare.
  - Contrarily, one quarter (23%) of Port Defiance/Coupeville riders believe this percentage relationship should be higher, significantly more than riders of other routes.

Vehicle/Driver Fare Relationship	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
It should be lower than 30%	24%	35%	24%	29%	18%	27%	16%	21%	22%	20%	15%	-
Keep it at 30%	**72%**	**57%**	**68%**	**65%**	**72%**	**73%**	**84%**	**71%**	**55%**	**76%**	**63%**	**100%**
It should be more than 30%	4%	8%	8%	6%	10%	-	-	7%	23%	3%	23%	-

**Caution: small sample size*

Vehicle/Driver Fare Relationship	1 n=31	10 n=193	23 n=435	24 n=88	26 n=105	34 n=124	35 n=161	36 n=33	40 n=136	43 n=46	Other n=158
It should be lower than 30%	21%	20%	29%	18%	26%	28%	27%	15%	18%	26%	16%
Keep it at 30%	**62%**	**70%**	**67%**	**73%**	**65%**	**67%**	**65%**	**82%**	**79%**	**67%**	**75%**
It should be more than 30%	18%	10%	4%	9%	9%	5%	8%	3%	4%	7%	9%

Q8 *Currently on most WSF routes, a passenger fare is 30% of the vehicle fare. Do you think this percentage is appropriate or should it be higher or lower?*

Fare Relationship - By Route

- There are no significant differences by route regarding the suggested vehicle/passenger fare relationship.

Suggested Vehicle/Passenger Fare Relationship	SEA/ BAIN	SEA/ BREM	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTD/ TAH	MUK/ CLI	PTT/ COU	ANA/ SJI	INTR SJI	ANA/ SID
Lower than 30%	*n=128*	*n=90*	*n=91*	*n=55*	*n=14**	*n=4**	*n=10**	*n=80*	*n=9**	*n=23**	*n=2**	*n=0*
1-9%	5%	10%	11%	2%	10%	-	11%	2%	-	4%	-	-
10-14%	10%	13%	21%	27%	5%	-	25%	15%	25%	18%	**63%**	-
15-19%	8%	10%	6%	7%	5%	-	-	12%	31%	16%	-	-
20-24%	29%	28%	21%	29%	30%	**64%**	**50%**	24%	10%	18%	-	-
25-29%	**48%**	**38%**	**42%**	**36%**	**51%**	36%	13%	**47%**	**34%**	**44%**	37%	-
Higher than 30%	*n=24**	*n=21**	*n=32*	*n=11**	*n=8**	*n=0*	*n=0*	*n=28**	*n=10**	*n=4**	*n=3**	*n=0*
31-39%	26%	32%	**28%**	17%	**40%**	-	-	**30%**	32%	**41%**	**80%**	-
40-49%	**36%**	26%	27%	26%	25%	-	-	28%	-	30%	-	-
50-59%	25%	**36%**	24%	**49%**	34%	-	-	28%	**62%**	7%	20%	-
60-69%	-	6%	20%	8%	-	-	-	3%	6%	7%	-	-
70% or more	14%	-	-	-	-	-	-	11%	-	15%	-	-

**Caution: small sample size*

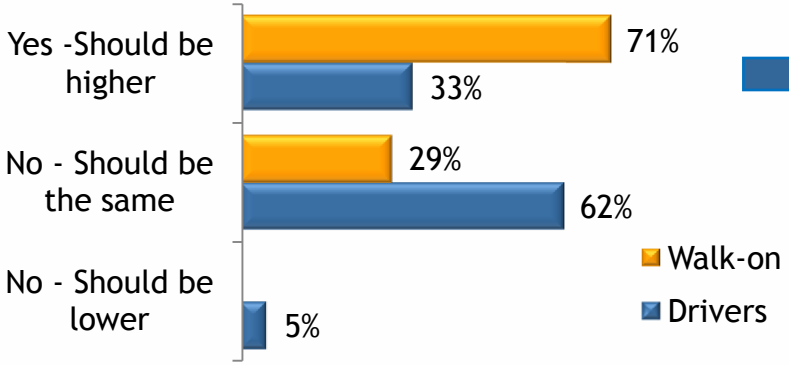
Q9-10 (How much lower/What percentage less) than the regular fare for vehicle & driver do you feel the passenger/walk-on fare should be?

Encouraging More Walk-On Passengers

- There is fairly strong support among those who last walked on (72%), as opposed to drove on (33%), for a policy in which vehicle fares increase at a greater percentage than passenger/walk-on fares, as a means to encourage more walk-on ridership.
  - Of those who support the strategy, it is strongly believed (60%) that passenger fares should increase at ¼ the rate of any vehicle fare increases. Drivers tend to support higher passenger fare increases.
- 35% of riders (60% among walk-on riders) would be more likely to use transit and walk on the ferry if they received a discount on both the ferry fare and transit pass when used in combination via the ORCA card.

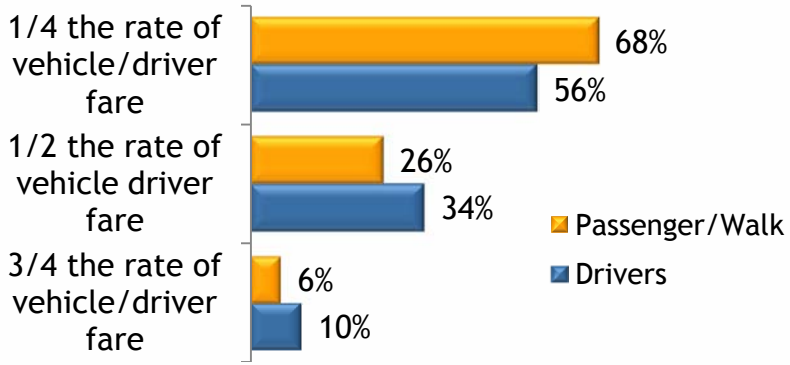
Support % Fare Increase Higher for Vehicle/Driver Tickets

(n=2,062)



Suggested Rate of Passenger Fare Growth

(n=935)



Q11 *To encourage more walk-on usage of the ferries, would you support the idea that any fare percentage increases be greater for vehicles than for passengers/walk-ons?*

Q12 *At which of these rates should the passenger fare grow?*

Q13 *Would you be more likely to use transit and walk on the ferry if you got a discount on both your ferry and transit pass when used in combination via the ORCA Card?*

Encouraging More Walk-On Passengers- By Route

- Support for a greater percentage increase in fares for vehicles than for passengers and walk-on riders is highest on the Seattle/Bremerton and Seattle/Bainbridge routes (which have a higher proportion of walk-ons than other routes).

Support % Fare Increase Higher for Vehicle/Driver	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Yes - Should be higher	**52%**	**54%**	40%	48%	37%	47%	34%	43%	35%	33%	26%	**100%**
No - Should be the same	46%	43%	**56%**	**51%**	**60%**	**53%**	**64%**	**54%**	**63%**	**64%**	**74%**	-
No - Should be lower	2%	3%	4%	1%	2%	-	2%	3%	3%	4%	-	-

Suggested Rate for Passenger Fare Growth	SEA/ BAIN n=278	SEA/ BREM n=139	EDM/ KIN n=152	FAU/ VAS n=92	FAU/ SOU n=28	SOU/ VAS n=7*	PTD/ TAH n=20*	MUK/ CLI n=162	PTT/ COU n=15*	ANA/ SJI n=37	INTR SJI n=4*	ANA/ SID n=2*
¼ the rate of vehicle/driver fare	**55%**	**72%**	**64%**	**62%**	**57%**	**72%**	**48%**	**58%**	25%	**57%**	**62%**	**100%**
½ the rate of vehicle/driver fare	34%	24%	24%	32%	37%	28%	47%	34%	**47%**	36%	38%	-
¾ the rate of vehicle/driver fare	11%	4%	12%	6%	7%	-	5%	8%	28%	7%	-	-

**Caution: small sample size*

Q11 To encourage more walk-on usage of the ferries, would you support the idea that any fare percentage increases be greater for vehicles than for passengers/walk-ons?

Q12 At which of these rates should the passenger fare grow?

Encouraging More Walk-On Passengers
By Route & Legislative District

- Seattle/Bainbridge and Seattle/Bremerton riders are significantly more likely than others to use transit and walk on the ferry if they received a discount on both the ferry fare and transit pass when used in combination via the ORCA card (again, these have a higher proportion of walk-ons than other routes).
- Nearly half (47%) of respondents in district 23 report they are more likely to use the transit if given a discount on both transit and ferry fares, significantly more than riders in other districts.

Transit Use Change Given Discount	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
More likely to use transit	44%	**55%**	28%	38%	30%	45%	18%	28%	31%	17%	21%	**50%**
Would not change	**56%**	45%	**72%**	**62%**	**70%**	**55%**	**82%**	**72%**	**69%**	**83%**	**79%**	**50%**

**Caution: small sample size*

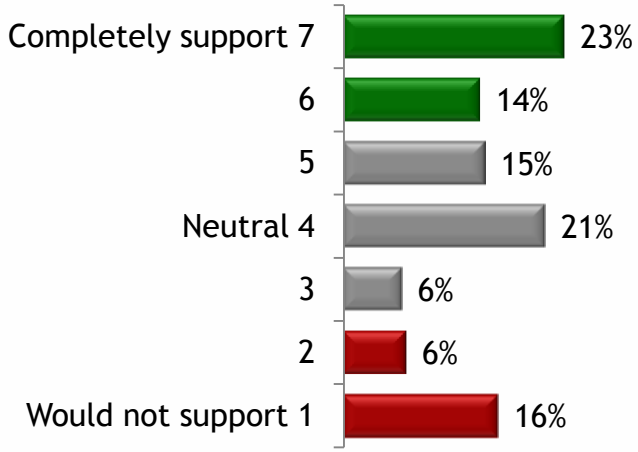
Transit Use Change Given Discount	1 n=31	10 n=193	23 n=435	24 n=88	26 n=105	34 n=124	35 n=161	36 n=33	40 n=136	43 n=46	Other n=158
More likely to use transit	15%	32%	**47%**	25%	43%	37%	43%	42%	18%	43%	35%
Would not change	**85%**	**68%**	**53%**	**75%**	**57%**	**63%**	**57%**	**58%**	**82%**	**57%**	**65%**

Q13 Would you be more likely to use transit and walk on the ferry if you got a discount on both your ferry and transit pass when used in combination via the ORCA Card?

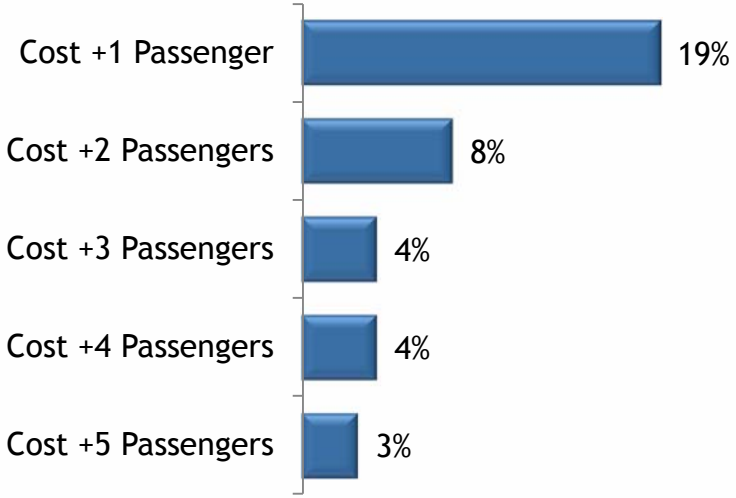
Flat-Rate Vehicle Fares

- One third (37%) of ferry riders support charging a flat vehicle fare regardless of the number of passengers.
  - Those last traveling on a multi-ride ticket (33%) are significantly less likely to support a flat vehicle fare than riders traveling on a regular (40%) or other (39%) ticket.
  - One quarter (25%) of multi-ride ticket passengers say they would not support (1-2 rating) this vehicle fare system.

Support Flat Fare Per Vehicle Regardless of Occupants
(n=2,062)



Support Given Price Increase
Top Box Rating (6-7; 7-pt. scale)
(n=1,932 - San Juans excluded)



Q14 To encourage car pooling, a flat fare per vehicle could be charged regardless of the actual number of occupants in the car. How supportive would you be of this approach?

Q15-16 To compensate for the loss of revenue for not charging for each and every passenger, the fare for vehicle plus driver would have to go up. So, how supportive would you be if the [route] fare for a vehicle plus drive increased from the current [price] to [price] which is the vehicle/driver +(1/2/3/4/5) passenger(s)?

Flat-Rate Vehicle Fares - By Route

- Support for a flat fare is highest among Seattle/Bainbridge riders.

Support Flat Fare Per Vehicle	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI N=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Support	41%	38%	35%	31%	35%	27%	28%	37%	32%	35%	34%	50%

Top Box Rating (6-7; 7-pt. scale)

Support Given Price Increase	SEA/ BAIN	SEA/ BREM	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTD/ TAH	MUK/ CLI	PTT/ COU	ANA/ SJI	INTR SJI	ANA/ SID
Cost +1 Passenger	25%	24%	15%	12%	15%	6%	2%	19%	21%	-	-	50%
Cost + 2 Passengers	11%	8%	7%	5%	7%	-	-	6%	6%	-	-	50%
Cost + 3 Passengers	6%	3%	3%	2%	4%	-	-	3%	6%	-	-	50%
Cost + 4 Passengers	5%	3%	3%	1%	5%	-	-	3%	-	-	-	50%
Cost + 5 Passengers	5%	2%	3%	1%	4%	-	-	3%	-	-	-	50%

Q14 To encourage car pooling, a flat fare per vehicle could be charged regardless of the actual number of occupants in the car. How supportive would you be of this approach?

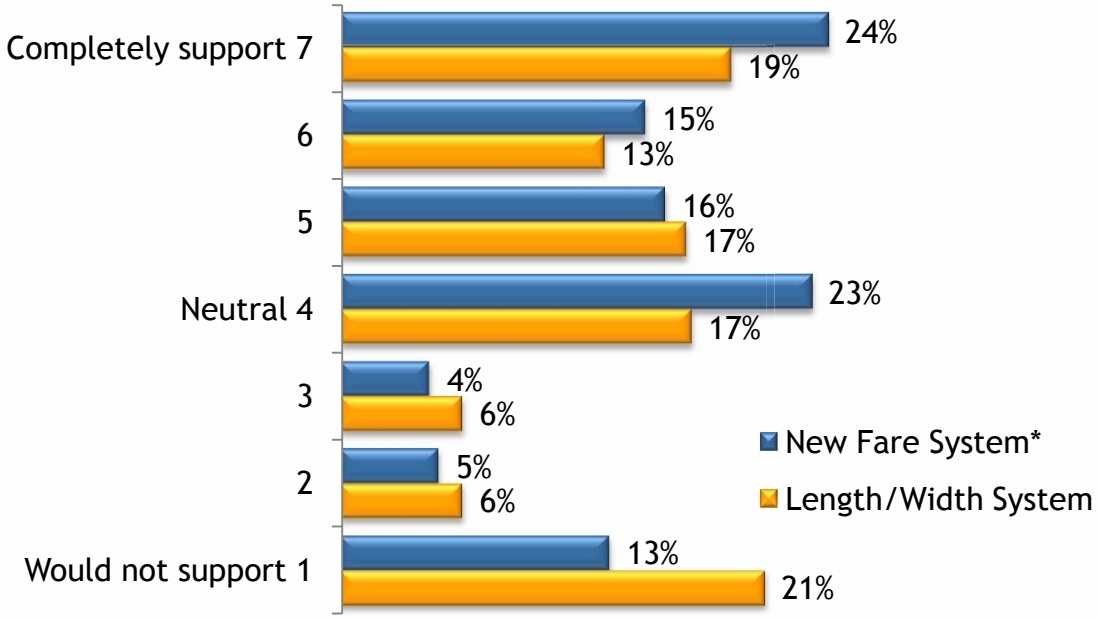
Q15-16 To compensate for the loss of revenue for not charging for each and every passenger, the fare for vehicle plus driver would have to go up. So, how supportive would you be if the [route] fare for a vehicle plus drive increased from the current [price] to [price] which is the vehicle/driver +(1/2/3/4/5) passenger(s)?

Vehicle Pricing by Size

- Support is significantly higher for a new graduated vehicle fare system* (details below) (39%) than a system based on the length and width of a vehicle (32%).
  - More than one quarter (27%) would not support a system based on actual measurements of the vehicles length and width.

Support Alternate Vehicle Fare Systems*

(n=2,062)



***GRADUATED FARE SYSTEM**

Vehicles between…

- 22’ to 30’ are charged 50% more than the current regular vehicle/driver fare
- 14’ to fewer than 22’ are charged the current regular vehicle/driver fare
- Less than 14’ are charged 25% less than current vehicle/driver fare

Q17 How supportive would you be of the following new vehicle system?
Q18 How supportive would you be of creating a new vehicle fare system where the fare is determined by actual measurement in feet of your vehicle length and width (the bigger and wider the vehicle the greater the fare)?

Vehicle Pricing by Size – By Route

- Support for a new graduated vehicle fare system is highest among Southworth/Vashon and Port Townsend/Coupeville riders.
- Only Port Townsend/Coupeville riders show more support for the length/width system.

	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Support New Vehicle Fare System	**42%**	**35%**	**35%**	**39%**	**36%**	**65%**	**32%**	**35%**	**60%**	**40%**	**53%**	-
Support Vehicle Length/Width Fare System	37%	33%	26%	38%	33%	26%	29%	30%	52%	30%	25%	**50%**

Top Box Rating (6-7; 7-pt. scale)
**Caution: small sample size*

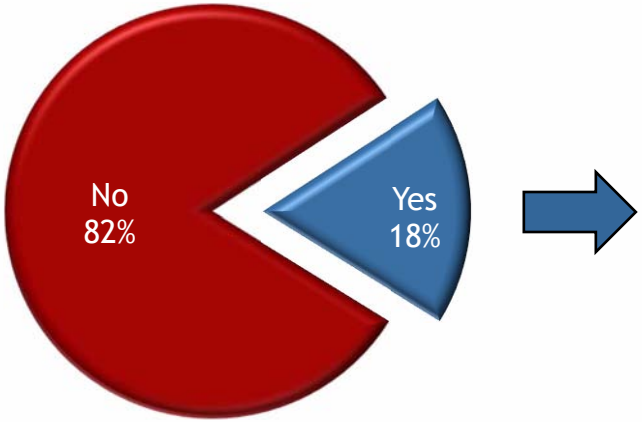
Q17 How supportive would you be of the following new vehicle system?
Q18 How supportive would you be of creating a new vehicle fare system where the fare is determined by actual measurement in feet of your vehicle length and width (the bigger and wider the vehicle the greater the fare)?

Saving Westbound Cost

- Only 18% of riders ever save the cost of the Westbound passenger fare by using some other way of getting to their Westside destination instead of the ferry.
  - Regular ticket (25%) users are more likely to say "yes" than multi-ride (12%) ticket holders.
- Riders who use alternates to the Westbound trip have done so an average of 5.5 times since January 1st of this year.

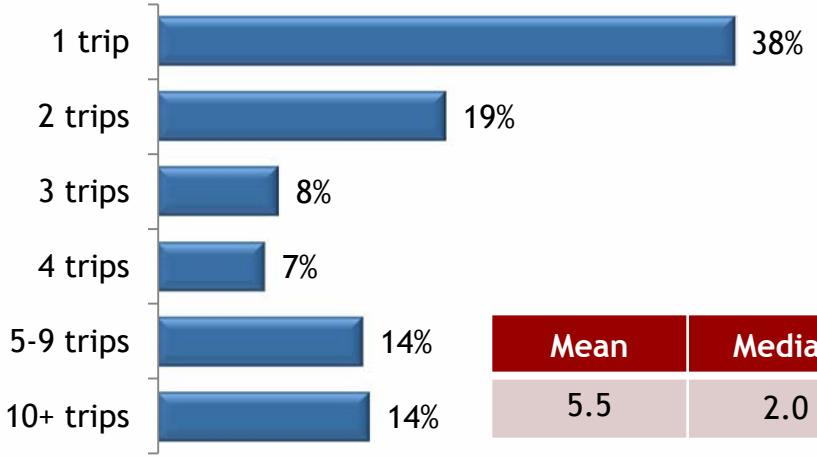
Save Cost by Other Modes of Westbound Travel

(n=2,062)



Total Cost Savings Trips in 2011

(n=361)



Mean	Median
5.5	2.0

Q18B For trips that include the ferry, do you ever save the cost of the Westbound passenger fare by using some other way of getting to your Westside destination instead of the ferry?

Q18C How many times have you done so since January 1st of this year?

Saving Westbound Cost - By Route

- The use of an alternate to the Westbound route is most often mentioned by those who took the Seattle/Bremerton, Edmonds/Kingston, Fauntleroy/Southworth, and Port Townsend/Coupeville routes most recently.

Use alternate to Westbound route	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI N=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Have done so	18%	28%	25%	4%	44%	17%	6%	9%	20%	6%	9%	-

Frequency since January 1, 2011	SEA/ BAIN	SEA/ BREM	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTD/ TAH	MUK/ CLI	PTT/ COU	ANA/ SJI	INTR SJI	ANA/ SID
1 trip	**31%**	**32%**	**41%**	**33%**	**32%**	**100%**	**71%**	**50%**	31%	**60%**	**100%**	-
2 trips	24%	20%	19%	11%	12%	-	-	7%	**47%**	27%	-	-
3 trips	8%	8%	12%	-	7%	-	-	5%	7%	4%	-	-
4 trips	10%	7%	6%	11%	3%	-	-	7%	15%	4%	-	-
5-9 trips	14%	20%	11%	22%	17%	-	-	13%	-	4%	-	-
10+ trips	12%	13%	12%	23%	29%	-	29%	19%	-	-	-	-

Sample sizes vary by option

Q18B For trips that include the ferry, do you ever save the cost of the Westbound passenger fare by using some other way of getting to your Westside destination instead of the ferry?

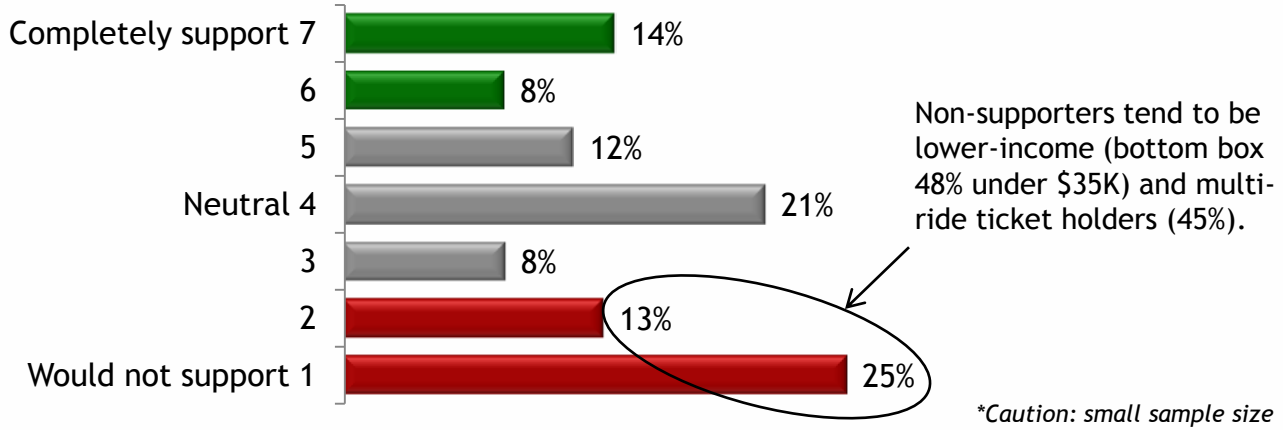
Q18C How many times have you done so since January 1st of this year?

Electronic Payment Card

- Response is lukewarm for a single electronic payment card to pay tolls on roads, transit fares, HOT lanes, and ferry fares, with 22% rating their support level at "6" or "7" on the 7-point scale.
  - Among riders last using a regular (single ride) ticket, 35% give ratings of "6" or "7", compared to 16% of those traveling on multi-ride tickets and 21% of those using other ticket type .

Support Single Electronic Payment Card

(n=2,062)



Top Box Rating (6-7; 7-pt. scale)

**Caution: small sample size*

Support Single Electronic Payment Card	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Support	23%	25%	29%	20%	29%	23%	11%	16%	18%	15%	-	50%

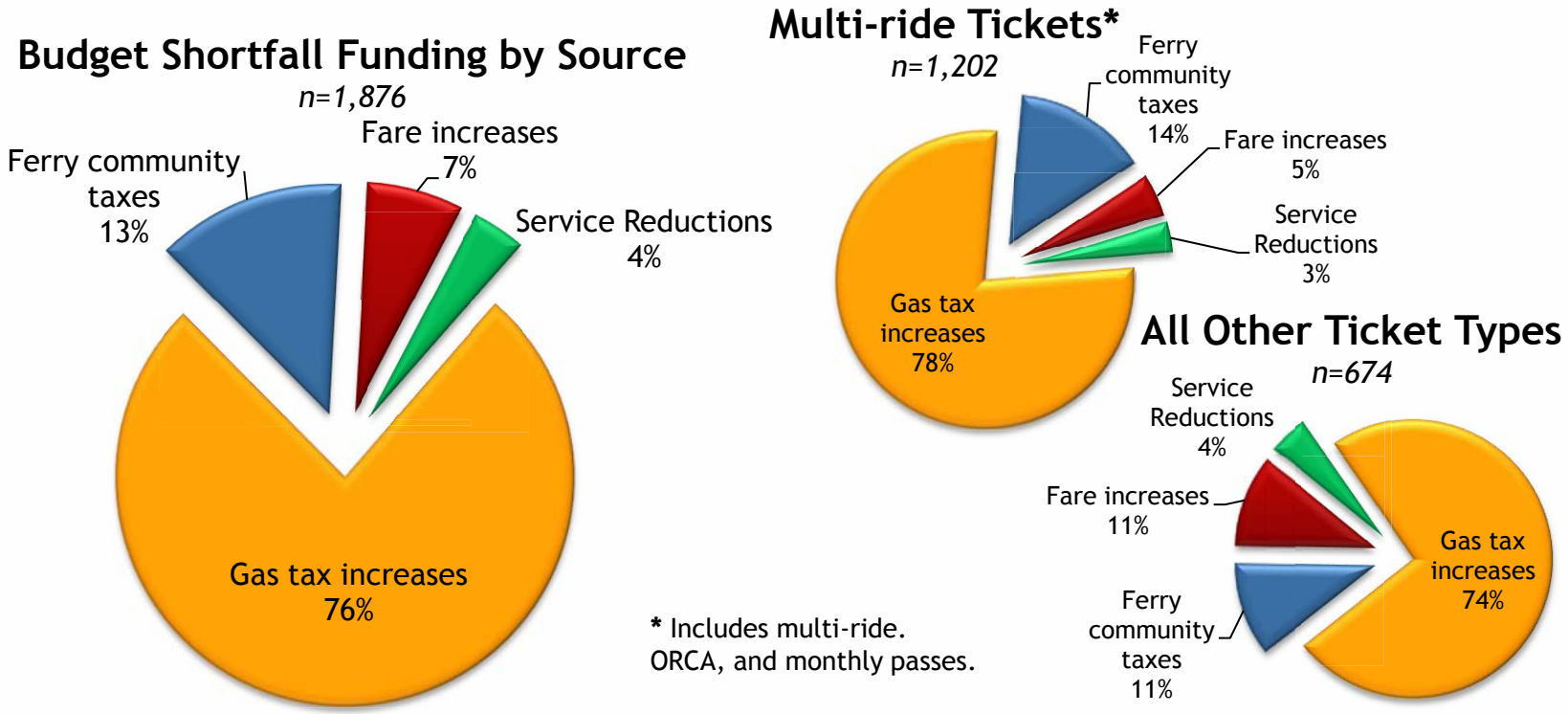
Q21 *How supportive would you be of having a single electronic payment card that you would use to pay tolls on road, transit fares, using in HOT lanes, and use to pay your ferry fares? To do this, ferries and transit services would need to simplify the fare structure and possibly eliminate some discounts.*

Budget Shortfall Funding

- Respondents were presented with WSF's current annual funding gap for both operational and capital needs of $210 million. Four options were given in order to close this gap completely:
  - Fare increase (Each percentage point increase in fares is worth $1 million per year)
  - Service reduction (Each percentage point decrease is worth $2 million per year)
  - Increase state $0.01 gas taxes (Each penny increase is worth $30 million per year)
  - Add new local tax per household in the 8 Puget Sound basin counties (Each $1.00/household tax increase is worth $2 million per year)
- Respondents were required to manipulate some or all of the variables in order to set the budget to close the full $210 million funding gap. Responses totaling any other amount were not accepted.
- A number of respondents expressed that they found this question either too difficult or limiting (too few options to cover the budget gap) to truly reflect their opinions on the matter. In total 91% of all respondents completed the question.
  - Because many decided not to complete this question, those respondents who at reached this page, but did not answer this question, were still deemed a 'complete' and counted in the rest of the survey. However, because some did not answer this question, it resulted in a smaller sample size for this question.

Budget Shortfall Funding by Source

- Consistent with other fare-related studies, the Fare Strategy survey respondents relied heavily on increased gas taxes to close the annual ferry budget funding gap for operations and capital needs, proposing on average that 76% come from that source.
- As seen throughout this study, multi-ride tickets holders are less inclined to raise fares.



Q20 *If you had to set the ferry budget to close the annual funding gap for both operational and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?*

Budget Shortfall Funding - By Route

- The preference for funding the budget shortfall through increased state-wide gas taxes is consistent across all ferry routes.

Sources of funds	SEA/ BAIN n=497	SEA/ BREM n=234	EDM/ KIN n=347	FAU/ VAS n=166	FAU/ SOU n=67	SOU/ VAS n=14*	PTD/ TAH n=51	MUK/ CLI n=338	PTT/ COU n=41	ANA/ SJI n=105	INTR SJI n=13*	ANA/ SID n=2*
Fare increases	6%	8%	9%	5%	6%	3%	3%	7%	14%	4%	5%	2%
Service reductions	4%	3%	4%	2%	4%	2%	3%	4%	5%	3%	2%	5%
Gas tax increases	**78%**	**73%**	**72%**	**80%**	**76%**	**88%**	**86%**	**76%**	**71%**	**84%**	**88%**	**79%**
Ferry community taxes	13%	16%	15%	13%	15%	7%	8%	13%	11%	9%	5%	14%

Amount Funded ($MM)	SEA/ BAIN n=497	SEA/ BREM n=234	EDM/ KIN n=347	FAU/ VAS n=166	FAU/ SOU n=67	SOU/ VAS n=14*	PTD/ TAH n=51	MUK/ CLI n=338	PTT/ COU n=41	ANA/ SJI n=105	INTR SJI n=13*	ANA/ SID n=2*
Fare increases	$12.5	$16.8	$18.9	$10.5	$12.5	$6.3	$6.3	$14.7	$29.1	$8.4	$10.5	$4.2
Service reductions	$8.3	$6.3	$8.4	$4.2	$8.3	$4.2	$6.3	$8.4	$10.4	$6.3	$4.2	$10.5
Gas tax increases	**$162.2**	**$153.3**	**$151.2**	**$168.0**	**$158.0**	**$184.8**	**$180.6**	**$159.6**	**$147.6**	**$176.4**	**$184.8**	**$165.9**
Ferry community taxes	$27.0	$33.6	$31.5	$27.3	$31.2	$14.7	$16.8	$27.3	$22.9	$18.9	$10.5	$29.4

**Caution: small sample size*

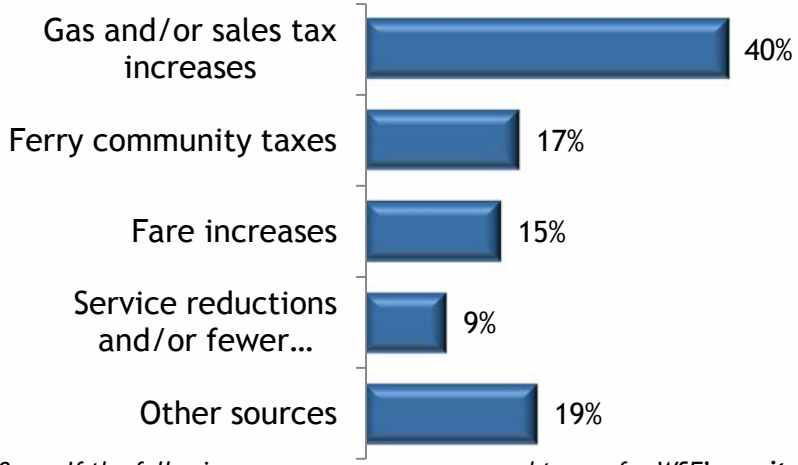
Q20 If you had to set the ferry budget to close the annual funding gap for both operational and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?

Budget Funding – Project Comparison

- The Nov. 2010 Capital Funding study showed that riders feel 40% (or $0.40 of every capital funding dollar) should come from increased statewide taxes, such as gas and/or sales tax.
- Respondents to the current study place nearly twice as much weight (76%) on gas tax increases when asked to distribute funding among only four sources, with clearly defined budget implications.
  - This increase may be explained in that respondents were not allowed to specify any other source of funding and that a tangible budget affect was given to each $0.01 of increased gas tax.

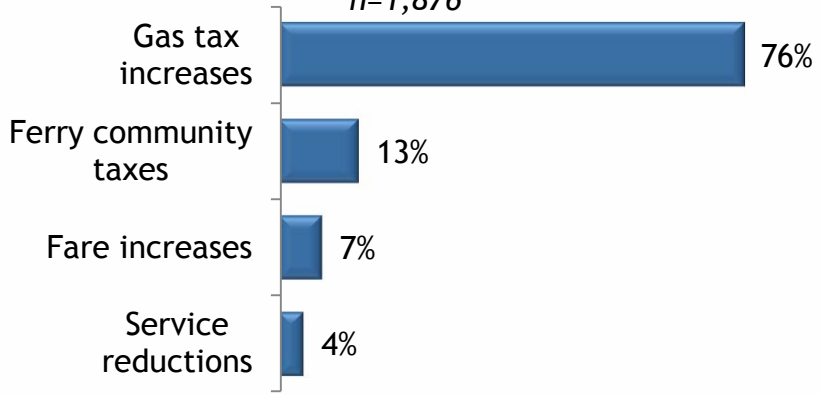
Capital Funding: % of Funding from Each Source

n=1,951



Fare Strategies: Weight Given Each Source

n=1,876

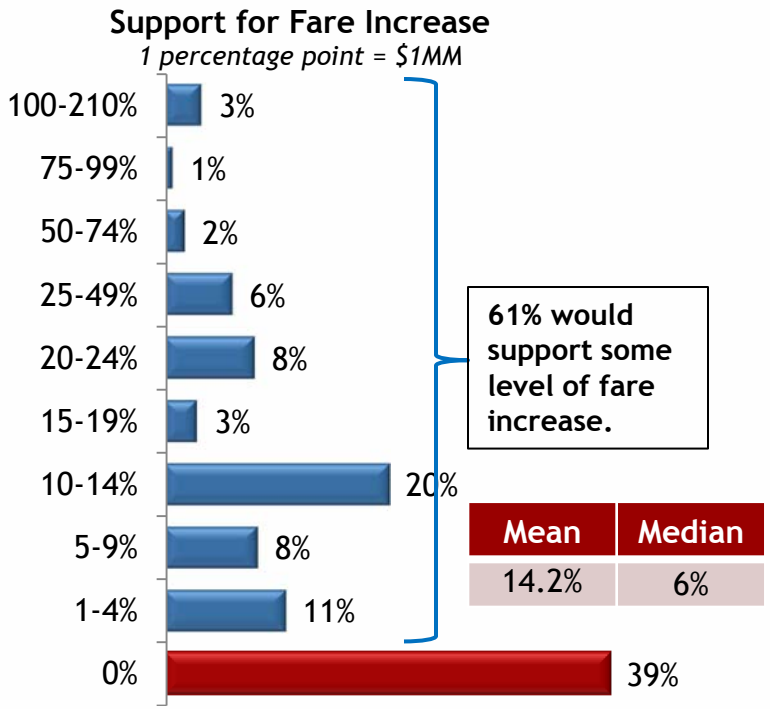


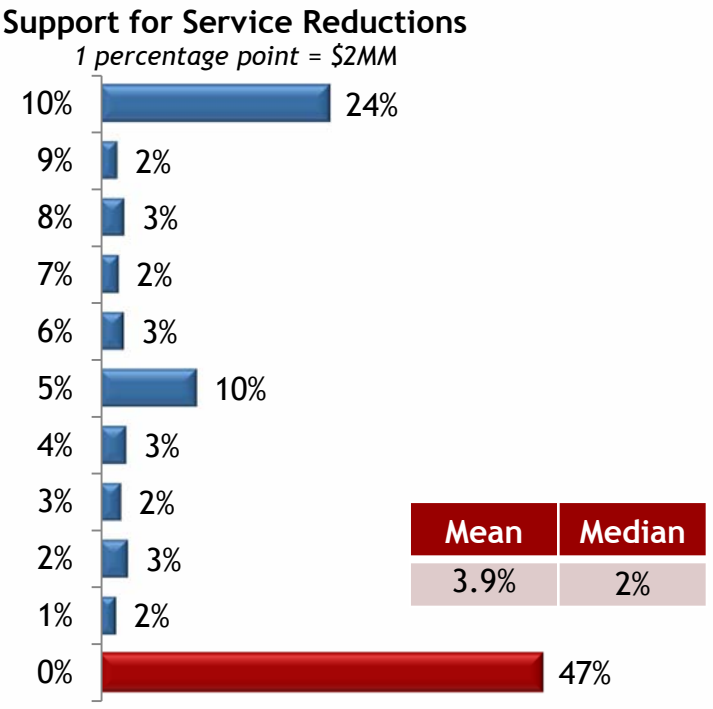
C10 *If the following revenue sources were used to pay for WSF's **capital funding needs**, what percent of the total funding need do you believe should come from each revenue source?*

Q20 *If you had to set the ferry budget to close the annual funding gap for both operational and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?*

Fare Increases & Service Reductions

- Among the 61% who would increase fares, support is highest for fare increases between 10% and 14%. The average fare increase (including those mentioning zero) is 14.2%.
- One quarter (24%) support service reductions of 10%, the highest level offered in the survey (which suggests a higher level of service reductions may have been as acceptable).
- One third (35%) said "no" to both fare increases *and* service reductions.





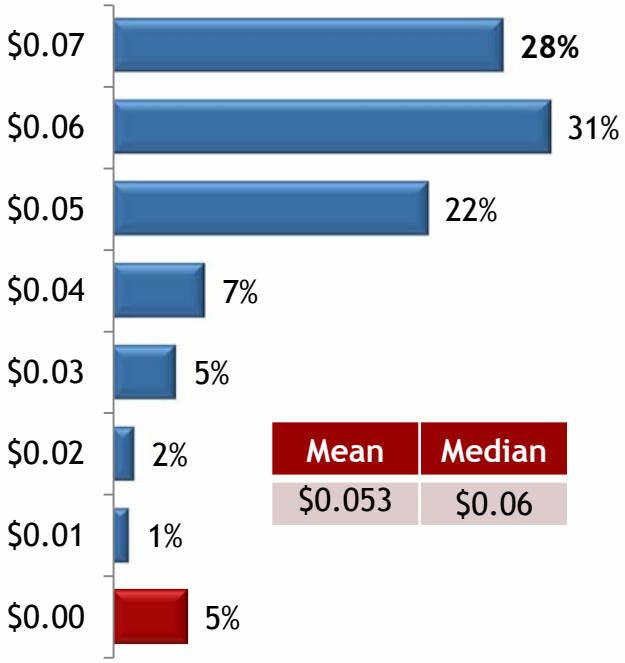
Q20 *If you had to set the ferry budget to close the annual funding gap for both operational and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?*

Gas & Community Taxes

- Support is greatest for a $0.06/gallon increased in the state-wide gas tax.
- Support for a local ferry-served community tax is highest at the $10-$14/household level.
- One quarter (28%) would have the entire shortfall covered by a $0.07/gallon increase in the state gas tax.

Support for Gas Tax Increase

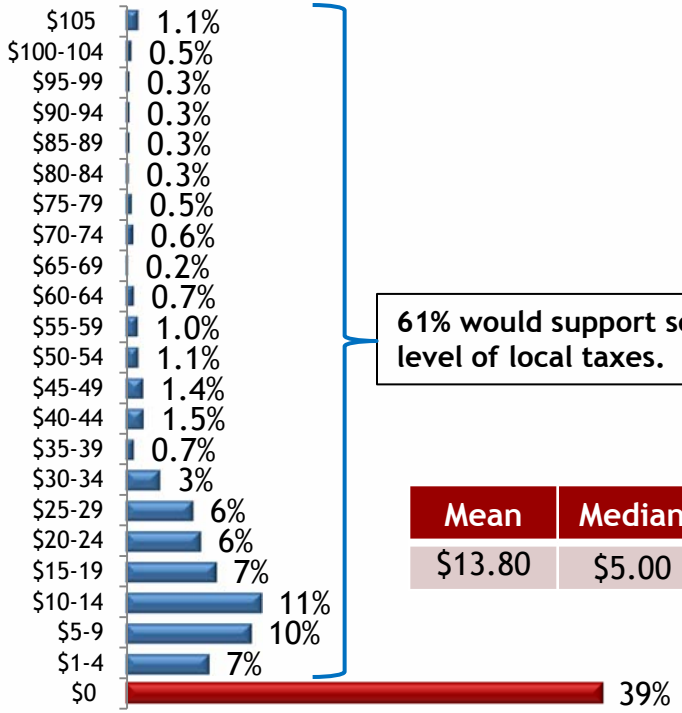
$0.01 tax increase = $30MM



Mean	Median
$0.053	$0.06

Support for Ferry Communities Tax

$1/household tax = $2MM



61% would support some level of local taxes.

Mean	Median
$13.80	$5.00

Q20 *If you had to set the ferry budget to close the annual funding gap for both operational and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?*

Demographics

Years Riding WSF

- Most riders have been using Washington State Ferries for ten years or more.
  - Riders on the Seattle/Bremerton route tend to be significantly more likely to have only been riding the ferries for three years or less.
- Data regarding years traveling via WSF is comparable to respondents to past surveys, including Summer/Winter surveys and Capital Funding.

	TOTAL n=1161	SEA/ BAIN n=310	SEA/ BREM n=158	EDM/ KIN n=214	FAU/ VAS n=106	FAU/ SOU n=44	SOU/ VAS n=11*	PTD/ TAH n=40	MUK/ CLI n=194	PTT/ COU n=25*	ANA/ SJI n=53	INTER SJI n=4*	ANA/ SID n=1*
Less than 3 years	8%	11%	18%	4%	3%	7%	-	5%	4%	-	7%	-	-
3 - 5 years	10%	11%	14%	6%	13%	11%	-	13%	9%	9%	7%	-	-
6 - 10 years	11%	12%	11%	10%	8%	15%	15%	11%	9%	5%	12%	15%	-
More than 10 years	**71%**	**66%**	**57%**	**79%**	**76%**	**67%**	**85%**	**71%**	**78%**	**86%**	**73%**	**85%**	**100%**

**Caution: small sample size*
Demographic information is not available for all respondents, causing percentages to not equal 100% of total sample size.

Gender & Age

- There are no significant differences in the distribution of gender between routes.
- Respondents to the current survey are more likely to be male (56%) than those in past studies (Summer, 44% male; Winter, 48% male; General Market Assessment, 49% male; and Capital Funding, 42% male).

	TOTAL n=1161	SEA/ BAIN n=310	SEA/ BREM n=158	EDM/ KIN n=214	FAU/ VAS n=106	FAU/ SOU n=44	SOU/ VAS n=11*	PTD/ TAH n=40	MUK/ CLI n=194	PTT/ COU n=25*	ANA/ SJI n=53	INTER SJI n=4*	ANA/ SID n=1*
Male	**56%**	**58%**	**54%**	**55%**	**56%**	**59%**	**84%**	**57%**	**55%**	46%	45%	31%	**100%**
Female	44%	42%	46%	45%	44%	41%	16%	43%	45%	**54%**	**55%**	**69%**	-

	TOTAL n=1161	SEA/ BAIN n=310	SEA/ BREM n=158	EDM/ KIN n=214	FAU/ VAS n=106	FAU/ SOU n=44	SOU/ VAS n=11*	PTD/ TAH n=40	MUK/ CLI n=194	PTT/ COU n=25*	ANA/ SJI n=53	INTER SJI n=4*	ANA/ SID n=1*
18 - 34 years	6%	5%	17%	5%	4%	8%	-	3%	3%	12%	2%	-	-
35 - 54 years	37%	39%	**49%**	30%	37%	39%	11%	41%	31%	**45%**	30%	**62%**	-
55 years or older	**57%**	**56%**	34%	**65%**	**59%**	**53%**	**89%**	**57%**	**66%**	43%	**68%**	38%	**100%**

**Caution: small sample size*
Demographic information is not available for all respondents, causing percentages to not equal 100% of total sample size.

Household Information

- Nearly half of all riders reside in a household of 2-4 occupants.
  - All routes tend to show the same distribution of number of household occupants.
- Similarly, there are no significant differences between routes regarding household income.
- Overall, household size and income are comparable to previous Winter/Summer and Capital Funding surveys.
  - Current respondents tend to have a significantly higher annual household income than past General Market Assessment respondents.

	TOTAL n=1161	SEA/ BAIN n=310	SEA/ BREM n=158	EDM/ KIN n=214	FAU/ VAS n=106	FAU/ SOU n=44	SOU/ VAS n=11*	PTD/ TAH n=40	MUK/ CLI n=194	PTT/ COU n=25*	ANA/ SJI n=53	INTER SJI n=4*	ANA/ SID n=1*
1 occupant	12%	11%	15%	10%	10%	11%	16%	26%	11%	6%	10%	-	-
2-4 occupants	**83%**	**85%**	**77%**	**84%**	**87%**	**85%**	**84%**	**74%**	**81%**	**87%**	**85%**	**69%**	**100%**
5 or more occupants	6%	4%	8%	6%	3%	4%	-	-	9%	7%	5%	31%	-

	TOTAL n=1161	SEA/ BAIN n=310	SEA/ BREM n=158	EDM/ KIN n=214	FAU/ VAS n=106	FAU/ SOU n=44	SOU/ VAS n=11*	PTD/ TAH n=40	MUK/ CLI n=194	PTT/ COU n=25*	ANA/ SJI n=53	INTER SJI n=4*	ANA/ SID n=1*
<$35K per year	7%	3%	11%	9%	7%	2%	26%	18%	7%	16%	8%	3%	-
$35 - $100K per year	**43%**	37%	**49%**	**45%**	**38%**	**44%**	**40%**	**44%**	**46%**	**56%**	**50%**	18%	-
More than $100K per year	31%	**41%**	26%	28%	35%	41%	19%	26%	25%	23%	21%	**33%**	**100%**

**Caution: small sample size*
Demographic information is not available for all respondents, causing percentages to not equal 100% of total sample size.

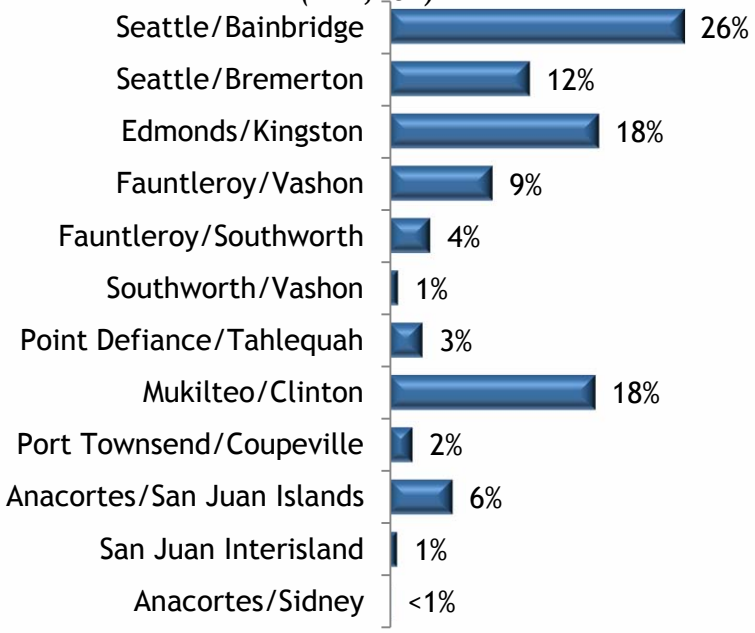
Appendix A: Weighting Scheme & Ridership Information

Weighting Bases

- Logically, current survey respondents closely match the route ridership of those responding to the Winter survey.
  - In general, data does not represent a statistical significance between any survey period.
- Current respondents (56%) are significantly more likely to have boarded as a vehicle driver than Summer (38%) or Winter (45%) survey respondents.
  - One in ten (10%) boarded as a vehicle passenger, significantly less in the Summer (29%) and Winter (23%).

Route Taken Most Recently

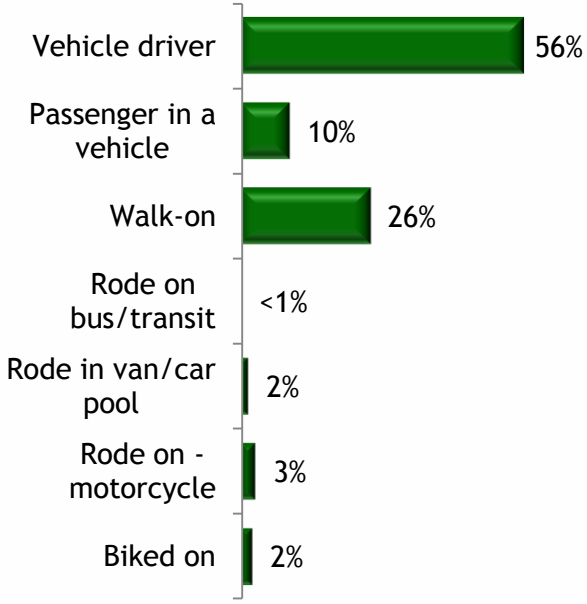
(n=2,062)



	Summer	Winter
Seattle/Bainbridge	26%	27%
Seattle/Bremerton	10%	11%
Edmonds/Kingston	18%	19%
Fauntleroy/Vashon	8%	9%
Fauntleroy/Southworth	3%	4%
Southworth/Vashon	1%	1%
Point Defiance/Tahlequah	3%	3%
Mukilteo/Clinton	16%	19%
Port Townsend/Coupeville	3%	2%
Anacortes/San Juan Islands	10%	5%
San Juan Interisland	1%	1%
Anacortes/Sidney	1%	-

Boarding Method

(n=2,062)



R1 *In order for us to have some context for your answers, what was the last route that you rode?*
R3 *Thinking about your last ferry ride only, were you the vehicle driver, a passenger in a vehicle, or did you walk onto the ferry?*

Weighting Scheme

- The following table outlines the methodology used in order to weight the data by route according to observed WSF ridership.

	Systemwide Riders	Desired Proportion	Completed surveys	Desired # of completes	Weight
SEA/BAIN	1,254,967	0.262873	421	537	1.283769862
SEA/BRE	593,688	0.124358	205	256	1.247215144
PTD/TAH	139,910	0.029306	14	60	4.303855551
EDM/KIN	880,869	0.184512	46	381	8.246894912
FAU/VAS	434,120	0.090933	289	188	0.646917527
FAU/SOU	173,587	0.036361	180	75	0.415318865
SOU/VAS	36,956	0.007741	124	16	0.12835129
PTT/KEY	98,654	0.020665	55	42	0.772483079
MUK/CLI	865,110	0.181211	414	375	0.899928399
ANA/SAN	262,860	0.055060	282	115	0.401432344
Interisland	33,320	0.006979	26	14	0.551910442

Fare Ticket Used

- Nearly half (45%) of respondents traveled on a multi-ride ticket on their most recent ferry trip.
  - There are no significant differences by route regarding the ticket type used on respondents' most recent ferry ride.
- Current respondents (45%) are significantly more likely than Summer survey riders (38%) to have last traveled on WSF using a multi-ride ticket.
  - Contrarily, current respondents (23%) are significantly less likely to used a single ride ticket on their last ferry trip than Summer survey (38%) respondents.
  - All other ticket types used are comparable to Summer survey data.

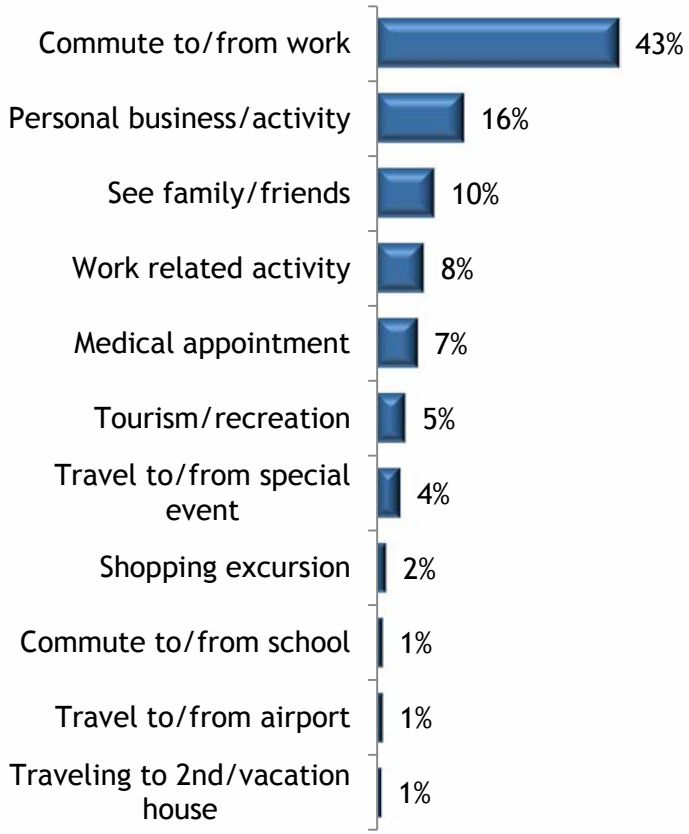
Fare Ticket Used	TOTAL	SEA/ BAIN n=537	SEA/ BREM n=256	EDM/ KIN n=381	FAU/ VAS n=188	FAU/ SOU n=75	SOU/ VAS n=16*	PTD/ TAH n=60	MUK/ CLI n=375	PTT/ COU n=42	ANA/ SJI n=115	INTR SJI n=14*	ANA/ SID n=2*
Multi-Ride Ticket	**45%**	**39%**	21%	34%	**66%**	**44%**	**64%**	**78%**	**58%**	21%	**70%**	**59%**	**50%**
Single Ride Ticket	23%	22%	27%	**36%**	11%	23%	16%	7%	17%	**58%**	16%	32%	-
Smartcard/ORCA	11%	17%	**29%**	4%	10%	12%	6%	2%	3%	-	-	-	-
Senior/Disabled	9%	7%	6%	15%	5%	9%	-	11%	11%	19%	11%	-	50%
Monthly Pass	8%	13%	16%	8%	3%	6%	13%	2%	5%	2%	-	-	-
Inter-Island Travel	1%	1%	-	<1%	3%	1%	-	-	<1%	-	1%	2%	-
Vanpool Pass	1%	1%	-	1%	1%	2%	-	-	1%	-	-	-	-
Other	2%	1%	<1%	3%	3%	2%	-	-	5%	-	3%	7%	-

**Caution: small sample size*

R5 Thinking about your most recent/current trip, what kind of ticket were you traveling on?

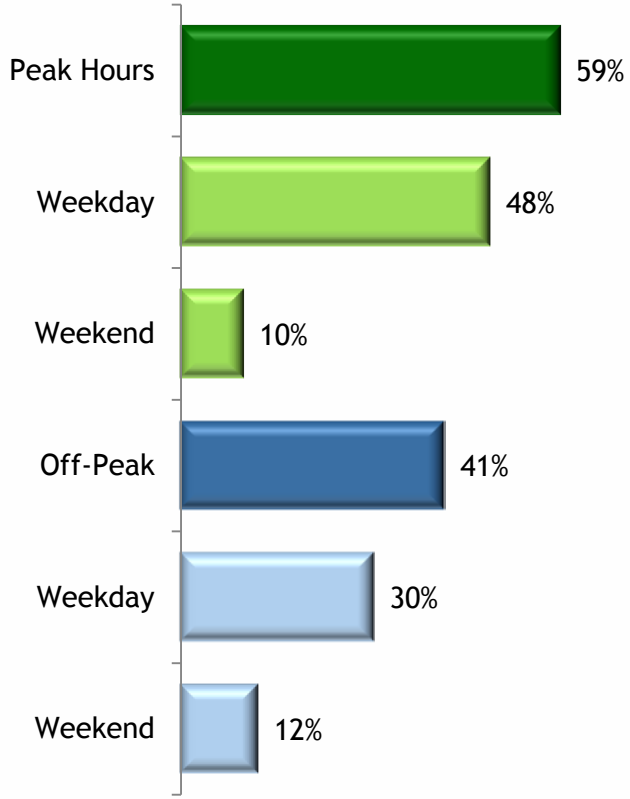
Travel Purpose & Time

Primary Trip Purpose
(n=2,062)



	Summer	Winter
Commute to/from work	29%	39%
Personal business/activity	12%	15%
See family/friends	20%	14%
Work related activity	5%	8%
Medical appointment	4%	7%
Tourism/recreation	18%	6%
Travel to/from special event	6%	4%
Shopping excursion	2%	1%
Commute to/from school	1%	1%
Travel to/from airport	<1%	<1%
Traveling to 2nd/vacation house	2%	2%

Travel Date & Time
(n=2,062)



R2 *Thinking about your last ferry ride only, which of the following was the primary purpose for that specific trip?*
R4 *What date and approximate time did you board the ferry on your most recent/current trip?*

Appendix B: Questionnaire

Questionnaire

Washington State Transportation Commission
Fare Strategy Survey (v6)
March 10, 2011

LANDING PAGE

We appreciate your help on this important **Fare/Service Strategy Survey** for the Washington State Ferries.

In this survey we will ask you to look at such issues as:

- **Fares and Congestion Pricing**
- **Possible Service Reduction Strategies**
- **Fare Discount Program Changes**

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

Thank you again for you continued interest in WSF and the Ferry Riders Opinion Group (FROG).

Sincerely,
Philip Parker, Chairman
Washington State Transportation Commission

STUDY EXPLANATION SCREEN

This survey deals with fares for Washington State Ferries which are set through a collaboration of the Washington State Ferries (WSF), the WA Transportation Commission, and the Ferry Advisory Committee on Tariffs (FAC-T).
Throughout this survey, we will be exploring your opinions on a variety of potential fare and service changes. As with all FROG surveys, the questions in this survey are not being asked because they are **indeed** going to happen. We ask questions that cover the gamut of possibilities to find out what you think so that we can more effectively identify the things that are worth exploring further and the things that are simply not, due to a complete lack of support.

Thank you again, for taking the time to help us with this important survey.

YOUR MOST RECENT FERRY TRIP (Needed for weighting the data)

R1 In order for us to have some context for your answers, what was **the last route that you rode?**

11 Seattle/Bainbridge
12 Seattle/Bremerton
13 Point Defiance/Tahlequah
14 Edmonds/Kingston
15 Fauntleroy/Vashon
16 Fauntleroy/Southworth
17 Southworth/Vashon
18 Port Townsend/Keystone
19 Mukilteo/Clinton
20 Anacortes/San Juan Islands
21 San Juan Interisland
22 Anacortes / Sydney

R2 Thinking about your **LAST FERRY RIDE ONLY**, which of the following was the **PRIMARY PURPOSE** for that specific trip?

11 Commute to / from work
12 Commute to / from School
13 Work related activity / business
14 Personal business / activity
15 Medical appointment
16 Everyday shopping
17 Shopping excursion
18 Tourism / recreation
19 Travel to / from special event
20 Travel to / from to see family / friends
99 Other → ***Please specify***

R3 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)

11 Vehicle driver
12 Passenger in a vehicle
13 Walk-on
14 Rode on in bus/transit
15 Rode on in van/car pool
16 Rode on – motorcycle
17 Biked on
99 Other → ***Please specify***

R4 What date and approximate time did you board the ferry on your most recent/current trip?

DATE: _____/ ____ / 2010-11 TIME: _____:_____ AM/PM
Month / Day *Hour : Minutes*

Questionnaire *(cont.)*

13379 WSTC Fare Strategies - BS/MH/NJ/TL

R5 Thinking about the your most recent/current trip, what kind of ticket were you travelling on?

DON'T SHOW CODE 13, 15, 16 IF R3 = 11 VEHICLE DRIVER
DON'T SHOW CODE 13, 15, 16 IF R1 = 20, 21
DON'T SHOW CODE 12, 13, 15, 16 IF R1 = 22

11 Single ride ticket
12 Multi-ride frequent user ticket (available to all passengers & non-oversized vehicles)
13 Monthly pass (not available to vehicle drivers)
14 Senior/disabled Convenience Card/discount
15 SmartCard/ORCA (One Regional Card for All)
16 Puget Pass
99 Other_____

General Fare Increases:

Capital funding is used for major overhaul and the preservation of boats and terminals as well as for the building of new boats and terminals. Between now and 2030, capital funding needs are $3.1 billion above and beyond current funding levels. This funding shortfall represents an annual capital funding gap of approximately $190 million.

There are a number of different potential revenue sources that could generate the needed capital funding, thus reducing the capital funding shortfall. We would like you to give us your opinions on some of the possible options with regards to fares.

Q1. How supportive on a 1-7 scale where 1 is "would not support at all" and 7 is "would completely support" are you for ... (ASK C OF EVERYBODY; ONLY ASK B IF C < 6; ONLY ASK A IF B < 6)

c. Charging an **additional $1.00 per vehicle or walk-on/passenger** fare, with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals). **Doing so would** generate an estimated $16 million per year.
b. Charging an **additional $0.50 per vehicle or walk-on/passenger fare,** with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals). This plan would generate an estimated $8 million per year.
a. Charging an **additional $0.25 per vehicle or walk-on/passenger fare,** with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals). This plan would generate an estimated $4 million per year.

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

13379 WSTC Fare Strategies - BS/MH/NJ/TL

Q4. The Sidney route operates only in the spring, summer and fall months and almost 100% of the riders are typically recreational users. The current cost recovery rate (the amount of operating expenses covered by fares) for that route is 55% (the average for all of WSF is 70%). Based on this information, what operational cost recovery rate do you believe the Sidney route should have?

1. 55% recovery rate seems fair
2. 56% - 60%
3. 61% - 65%
4. 66% - 70%
5. 71% - 75%
6. 76% - 80%
7. 81% - 85%
8. 86% - 90%
9. 91% - 95%
10. 96% - 100%

Multi-Ride Ticket Program:

Q5. Currently the vehicle/driver multi-ride ticket is not affected by the summer surcharge on fares. So while they are 20% (25% in the San Juan Islands) less than single fare ticket in the winter, the multi-ride tickets can be upwards of 35% (45% in the San Juan Islands) less than the "single fare ticket with summer surcharge".

If the summer surcharge was added to the cost of using the multi-ride ticket similar to the single fare ticket during the summer period. This would generate $2.5 million of additional revenue. Do you favor or oppose having those summer surcharge apply to the multi-ride tickets?

Strongly oppose - multi-ride ticket holders should not have to pay the summer surcharge			Neutral			Strongly Favor - multi-ride ticket holders should also pay the summer surcharge
1	2	3	4	5	6	7

Questionnaire *(cont.)*

13379 WSTC Fare Strategies - BS/MH/NJ/TL

Fare Schedule Simplification:

Q6a. Currently bicycle riders pay the passenger fare plus either a round trip bicycle surcharge or a yearly bicycle permit. At present, bicycle riders can buy a yearly bicycle permit for $20 that exempts them from the $1 per round trip bicycle surcharge on all routes except the San Juan Islands and Sidney.

WSF is looking at eliminating the yearly bicycle permit all together and simply allowing passengers who use multi-ride cards or monthly passes to take their bike on for free and extend this program to the San Juan Islands. To offset the revenue loss, the single fare bicycle surcharge would have to increase.

Conceptually, how supportive on a 1-7 scale where 1 is "would not support at all" and 7 is "would completely support" are you for eliminating the yearly bicycle permit, allowing bicyclists who travel with multi-ride cards or monthly passes to take their bikes on for free, but increasing the single fare bicycle surcharge to offset the revenue losses?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q6b. (Q6a=2-7) What would you consider a reasonable fee to be for the round trip bicycle surcharge for those bicycle travelers not using a multi-ride card or monthly pass for all routes except San Juan Islands?

1. $1.00 (keep it the same as today)
2. $1.50
3. $2.00
4. $5.00

Q6c. (Q6a=2-7) What would you consider a reasonable fee to be for the round trip bicycle surcharge for those bicycle travelers not using a multi-ride card or monthly pass for just the Anacortes to San Juan Islands?

1. $2.00 base season/$4.00 peak season (keep it the same as today)
2. $3.00 base season/$6.00 peak season
3. $5.00 base season/$10.00 peak season

13379 WSTC Fare Strategies - BS/MH/NJ/TL

Congestion and Fare Strategies:

Q7. We are seeing tolling used more on state highways as a means to fund major improvements and manage growing congestion by charging higher toll rates during peak hours of the day when demand is the highest.

As a part of the state highway system, our ferry routes experience the same type of congestion during peak hours of the day but our fare structure has been uniform across all parts of the day.

As a way to help manage demand, do you think fares should be higher for drivers of vehicles who travel during the most congested peak hours, similar to what we are doing on some of our other state highways?

1. Yes
2. No

Passenger/Vehicle Fare Relationship:

Q8. Currently on most WSF routes a passenger fare is 30% of the vehicle fare. Do you think this percentage is appropriate or should it be higher or lower?

1. It should be lower than 30%
2. Keep it at 30%
3. It should be more than 30%

Q9. **(IF Q8=1)** How much lower than the regular fare for vehicle & driver do you feel the passenger/walk-on fare should be?

List 1-29%

Q10. (IF Q8=3) What percentage less than the regular fare for vehicle & driver do you feel the passenger/walk-on fare should be?

List 31-100%

Q11. To encourage more walk-on usage of the ferries, would you support the idea that any fare percentage increases be greater for vehicles than for passengers/walk-ons?

1. Yes - Vehicle/Driver fare increase percentage should be higher than for passenger/walk-on fares
2. No - The percentage increase should by the same for both
3. No - Passenger/Walk-on fare increase percentage should be higher than for Vehicle drive-on fares

Q12. **(IF Q11=1)** At which of these rates should the passenger fare grow:

1. ¼ the rate of the vehicle/driver fare
2. ½ the rate of the vehicle/driver fare
3. ¾ the rate of the vehicle/driver fare

Questionnaire *(cont.)*

Transit Connections:

Q13. Would you be more likely to use transit and walk on the ferry if you got a discount on both your ferry and transit pass when used in combination via the ORCA Card?

1. More likely to use transit and walk on, or
2. No change – other factors are more important

Encouraging Carpooling:

Q14. To encourage car pooling, a flat fare per vehicle could be charged regardless of the actual number of occupants in the car. Using a 1-7 scale where 1 is "would not support at all" and 7 is "would completely support," how supportive would you be of this approach?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q15. (If Q14=2-7) To compensate for the loss of revenue for NOT charging for each and every passenger, the fare for vehicle plus driver would have to go up. So, how supportive using that same 1-7 scale where 1 is "would not support at all" and 7 is "would complete support, would you be if the [R1 Route] fare for a vehicle plus driver increased from the current [$(R1+R5 response)] to [$(R1+R5+1 passenger cost)] which is the vehicle/driver + 1 passenger?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q16a. (If Q15=2-7) How supportive using that same 1-7 scale, would you be if the [R1 Route] fare for a vehicle plus driver increased from the current [$(R1+R5 response)] to [$(R1+R5+2 passenger cost)] which is the vehicle/driver + 2 passenger?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q16b. (If Q16a=2-7) How supportive using that same 1-7 scale, would you be if the [R1 Route] fare for a vehicle plus driver increased from the current [$(R1+R5 response)] to [$(R1+R5+3 passenger cost)] which is the vehicle/driver + 3 passenger?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q16c. (If Q16b=2-7) How supportive using that same 1-7 scale, would you be if the [R1 Route] fare for a vehicle plus driver increased from the current [$(R1+R5 response)] to [$(R1+R5+4 passenger cost)] which is the vehicle/driver + 4 passenger?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q16d. (If Q16c=2-7) How supportive using that same 1-7 scale, would you be if the [R1 Route] fare for a vehicle plus driver increased from the current [$(R1+R5 response)] to [$(R1+R5+5 passenger cost)] which is the vehicle/driver + 5 passenger?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Vehicle Pricing by Size:

Q17. Currently vehicle between 20' and 30' in length are charged 50% more than vehicles below 20' which are charged the regular vehicle fare. How supportive would you be of the following new vehicle fare system?

Vehicles between ...
- 22' to 30' feet are charged 50% MORE than the current regular vehicle/driver fare
- 14' to fewer than 22' feet are charged the current regular vehicle/driver fare
- Less than 14' are charged 25% LESS than current regular vehicle/driver fare

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Questionnaire *(cont.)*

13379 WSTC Fare Strategies - BS/MH/NJ/TL

Q18. How supportive would you be of creating a new vehicle fare system where the fare is determined by actual measurement in feet of your vehicle length and width (the bigger and wider the vehicle the greater the fare)?

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

Q18B.
Q18B. Currently, passengers on the Fauntleroy/Southworth, Seattle/Bremerton, Seattle/Bainbridge, Edmonds/Kingston and Mukilteo/Clinton ferries are charged a round trip fare only on Westbound trips.

For trips that include the ferry, do you ever save the cost of the Westbound passenger fare by using some other way of getting to your Westside destination instead of the ferry?

1 Yes
2 No

Q18C. **(IF YES)** How many times have you done so since January 1st of this year?

RECORD:_____

Summer Surcharge:

Q19. The 25% vehicle fare surcharge for the peak travel season runs from May 1 to October 1 currently. Would you favor or oppose expanding this period go from April 1 to November 1 if doing so would raise approximately $1? million in additional revenues per year to support current service levels.

Strongly oppose			Neutral			Strongly Favor
1	2	3	4	5	6	7

Fare Media:

Q21. How supportive would you be of having a single electronic payment card that you would use to pay tolls on road, transit fares, using in HOT lanes, and use to pay your ferry fares? To do this, ferries and transit services would need to simplify the fare structure and possibly eliminate some discounts.

Would not support at all			Neutral			Would completely support
1	2	3	4	5	6	7

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Budget Shortfall

Q20. If you had to set the ferry budget to close the annual funding gap for both operations and capital needs, how would you balance fare increases, service reductions, increase in gas tax and local taxes to close the estimated annual $210 million gap?

a.	0%-210%	Fare Increase (Each percentage point increase in fares is worth $1 million per year)
b.	0-10%	Service reduction (Each percentage point decrease is worth $2 million per year)
c.	$0.00-$0.07	Increased state $0.01 gas taxes (Each penny increase is worth $30 million per year)
d.	$0.00-$105	Add new local tax per household in the 8 Puget Sound basin counties (Island, Jefferson, San Juan, Kitsap, King, Pierce, Skagit, and Snohomish - Each $1.00/household tax increase is worth $2 million per year)

END SCREEN

Thank you for completing this survey. We are very appreciative of the time you have taken to give us your thoughts.

Your opinion and those of your fellow riders do guide our decisions and hopefully will result in a better ferry system for everyone.

Again, thank you.