

2012 Ferry Customer Survey

Report of Findings

Prepared for:



January 2013



Prepared by





STATE OF WASHINGTON
TRANSPORTATION COMMISSION

PO Box 47308, Olympia WA 98504-7308 • 2404 Chandler Ct SW Suite 270, Olympia WA 98502
(360) 705-7070 • Fax (360) 705-6802 • transc@wstc.wa.gov • <http://www.wstc.wa.gov>

January 7, 2013

The Honorable Jay Inslee
Office of the Governor
PO Box 40002
Olympia, WA 98504-0002

The Honorable Members
Washington State Senate
PO Box 40482
Olympia, WA 98504-0482

The Honorable Members
Washington State House of Representatives
PO Box 40600
Olympia, WA 98504-0600

Dear Governor Inslee and Honorable Members of the Senate and House of Representatives:

The Washington State Transportation Commission (WSTC) is pleased to submit this report which outlines the findings of our 2012 Ferry Customer Survey effort. The report summarizes the key findings of the surveys we conducted over the last year which largely focused on Washington State Ferries (WSF) customer satisfaction and performance issues. Also included is a CD which contains the detailed data supporting the findings in this report.

This survey effort was done primarily online through our survey panel of over 7,400 ferry customers who are part of the Ferry Riders' Opinion Group (FROG) the WSTC manages. During 2012 we conducted two major surveys:

1. A winter survey which was done online with the FROG panel members.
2. A summer survey that was done online with the survey panel as well as conducted on the ferries. The survey was conducted on the ferries to ensure recreational riders, who are generally not members of the survey panel, could participate in the survey and provide input as required by law.

We hope you find this information useful and informative as you work towards identifying means and approaches to addressing the many challenges facing our state ferry system.

Sincerely,

A handwritten signature in black ink, appearing to read "Dan O'Neal".

Dan O'Neal, Chairman
Washington State Transportation Commission



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EXECUTIVE SUMMARY

Executive Summary

The focus for this biennium was to measure the customer satisfaction as per **RCW 47.64.355 Section 2**.

Overall satisfaction with the ferries has not improved since 2008 (Summer 2012 68%; Winter 2012 67%; 2010 72%; 2008 64%). Although satisfaction has remained stable, there are also areas noted for improvement.

The specific service areas most likely to impact overall satisfaction are as follows (these areas of opportunity are the same for both Summer and Winter 2012):

- ❖ Bathrooms on the ferries should be clean and well maintained
- ❖ Loading procedures should be efficient
- ❖ Vehicles should be processed through ticket lanes efficiently
- ❖ Loading crews should provide clear directions and/or hand signals
- ❖ Vessels should be well maintained (not rusty/dirty) and safe (not cluttered)
- ❖ Loading and unloading for walk-on passengers should be easy
- ❖ Terminals should be clean and well maintained

These areas are of high importance to riders, but satisfaction with WSF's performance is rated as below average. It will be important for WSF to take action to address areas of poor performance, as well as to inform riders of actions taken.

STUDY BACKGROUND & METHODOLOGY

Study Background & Methodology

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 many of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Rider's Opinion Group (F.R.O.G.), an online community where ferry travelers have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). Since 2010, all WSTC research has been conducted using the F.R.O.G. panel, with the exception of gathering input from recreational ferry riders each biennium – in this case surveys are conducted on-board the ferries. The F.R.O.G. survey panel currently has roughly 7,400 members.

The following laws direct the Washington State Transportation Commission's ferry rider surveys:

RCW 47.60.286

(1) The commission shall, with the involvement of the department, conduct a survey to gather data on ferry users to help inform level of service, operational, pricing, planning, and investment decisions. The survey must include, but is not limited to:

- (a) Recreational use;
- (b) Walk-on customer use;
- (c) Vehicle customer use;
- (d) Freight and goods movement demand; and
- (e) Reactions to potential operational strategies and pricing policies described under RCW [47.60.327](#) and [47.60.290](#).

(2) The commission shall develop the survey after providing an opportunity for ferry advisory committees to offer input.

(3) The survey must be updated at least every two years and maintained to support the development and implementation of adaptive management of ferry services.

RCW 47.64.355

Performance targets must be established by an ad hoc committee with members from and designated by the office of the governor, which must include at least one member from labor. The committee may not consist of more than eleven members. By December 31, 2011, the committee shall present performance targets to the representatives of the legislative transportation committees and the joint transportation committee for review of the performance measures listed under this section. The committee may also develop performance measures in addition to the following:

(1) Safety performance as measured by passenger injuries per one million passenger miles and by injuries per ten thousand revenue service hours that are recordable by standards of the federal occupational safety and health administration and related to standard operating procedures;

(2) Service effectiveness measures including, but not limited to, passenger satisfaction of interactions with ferry employees, cleanliness and comfort of vessels and terminals, and satisfactory response to requests for assistance. Passenger satisfaction must be measured by an evaluation that is created by a contracted market research company and conducted by the Washington state transportation commission as part of the ferry riders' opinion group survey. The Washington state transportation commission shall, to the extent possible, integrate the passenger satisfaction evaluation into the ferry user data survey described in RCW [47.60.286](#);

(3) Cost-containment measures including, but not limited to, operating cost per passenger mile, operating cost per revenue service mile, discretionary overtime as a percentage of straight time, and gallons of fuel consumed per revenue service mile; and

(4) Maintenance and capital program effectiveness measures including, but not limited to: Project delivery rate as measured by the number of projects completed on time and within the omnibus transportation appropriations act; vessel and terminal design and engineering costs as measured by a percentage of the total capital program, including measurement of the ongoing operating and maintenance costs; and total vessel out-of-service time.

The ad hoc committee described in subsection (1) of this section expires December 31, 2011.

General Overview of Study Efforts

The 2012 research initiative consisted of the following two main phases:

Winter Customer Survey – May 2012

Summer Customer Survey – September 2012

The main objective of the 2012 research initiative was to understand, from the ferry riders' perspective, the level of customer service provided by WSF, as well as their travel behavior, opinions and attitudes regarding important issues currently facing the state. This overall objective resulted in the following areas of exploration:

- ❖ Customer satisfaction on board the ferries, at the terminals and via the WSF website & telephone support
- ❖ Winter and summer travel activity
- ❖ Transit connections
- ❖ Fare structures and mode shift
- ❖ Impact of the Tacoma Narrows Bridge
- ❖ Demographic characteristics

Respondents to each survey were F.R.O.G. panel members or members of the general recreational/social ferry traveling public. The panel members voluntarily joined the Ferry Rider's Opinion Group (F.R.O.G.), created in 2010 as part of the Ferry Research Initiative to give riders a way to provide ongoing feedback regarding Washington State Ferries. To capture non-F.R.O.G. panelist attitudes about recreational/social ferry usage, surveys were also conducted onboard the ferry during the summer travel period.

During each phase of the research process, data was collected, analyzed and reported by Market Decisions Corporation. High-level overviews of key findings are reported in aggregate in this executive summary report. More detailed information for each survey phase can be found in the technical reports included on the enclosed CD.

Overview of Technical Reports

Results of each phase of the research process are documented in detail in the technical reports which are contained in the enclosed CD, and are outlined below. When viewing this document electronically, quick access to the winter and summer technical reports is available by clicking the report name shown just prior to its description.

[Winter Customer Survey](#)

The first phase of the research process involved an in-depth survey of ferry riders who belong to the F.R.O.G. survey panel, and was fielded at the end of the winter travel period. Several important issues were tested in this survey including detailed ferry satisfaction metrics, individual and family travel habits, transit connections and fare structures. A total of 1,754 completed surveys were collected in May 2012.

[Summer Customer Survey](#)

After the summer travel period, F.R.O.G. panel members were asked to complete a similar comprehensive survey focusing mainly on detailed customer service issues, but also including recreational ridership questions. Issues addressed included summer recreational ridership trends and fare coverage, as well as overall satisfaction with a variety of ferry services. In total, 2,890 F.R.O.G. panel members completed the survey.

On-Board Summer Customer Survey

During the peak summer travel period (end of July – first of August), on-board, in-person surveys conducted with ferry riders were also completed using a shortened Summer Customer Survey aimed at people who were not F.R.O.G. panel members. The shorter survey focused primarily on questions related to recreational ridership. The on-board surveys were collected in order to reach members of the general public who travel on the ferries for recreational purposes. While this survey was much shorter than the comprehensive online version completed by F.R.O.G. panel members, comparisons between F.R.O.G. survey data and on-board survey data is made in this executive report, as well as the full technical report included on the enclosed CD, where applicable.

In addition to the technical reports, a variety of supporting and supplemental information is available for each phase of the research process. This information includes the survey questionnaires, raw data files (in SPSS) and data tables. These files can be found on the enclosed CD as well. With one exception, all research, data collection and analysis was conducted by Market Decisions Corporation, with input from the WSTC Research Team. Pacific Research of Seattle was used to collect the data for the on-board summer survey. For questions regarding this research, or to request any additional information not included in this report or the accompanying CD, please contact the WSTC offices at (360) 705-7070.

GENERAL FERRY TRAVEL HABITS/ACTIVITES

General Ferry Travel Habits/Activities - Summary

Contains information regarding:

- ❖ Ridership frequency
- ❖ Boarding method and purpose
- ❖ Ticket type & multi-ride passes
- ❖ Actual & expected change in ferry ridership

Information gathered from the following surveys*:

Winter Customer Survey

F.R.O.G. panel members

Summer Customer Survey

F.R.O.G. panel members

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings

General Ferry Ridership

- ❖ Seattle/Bainbridge and Edmonds Kingston remain as the most commonly utilized routes. Meanwhile, each of the following routes shows a decline of at least two monthly round trips in the summer 2012 compared to the winter 2012 period:
 - Seattle Bainbridge (12.5 vs. 10.1)
 - Seattle/Bremerton (12.7 vs. 8.6)
 - Fauntleroy/Southworth (13.0 vs. 8.2)
 - Southworth/Vashon (7.3 vs. 2.8)
 - San Juan Interisland (5.0 vs. 2.7)
- ❖ Riders are most likely to board the ferry as a vehicle driver or passenger, while summer riders are significantly more likely to board as a passenger (34%) vs. winter (21%).
- ❖ Commuting is the main purpose for roughly two thirds of riders' last trip; though significantly more mention recreational purposes during the summer (26%) vs. winter (18%).
- ❖ Single- and multi-ride tickets are the most popular ticket types. However, for 2012 winter riders are less likely than summer riders to use a single-ride ticket (21% vs. 41%), and more likely to use a multi-ride ticket (43% vs. 31%).
 - More than 80% of multi-ride ticket users report not sharing their ticket with others under the age of 19.

General Ferry Travel Habits/Activities – Detailed Findings

Ridership Frequency

Respondents to all surveys since 2008 were asked to provide information regarding the routes they have, or have most recently, ridden during the survey period. Route ridership on several routes shows a decline of at least two round trips per month during the 2012 summer period compared to 2012 winter period (red shading below). Overall, average monthly ridership on most routes is down from 2010 levels.

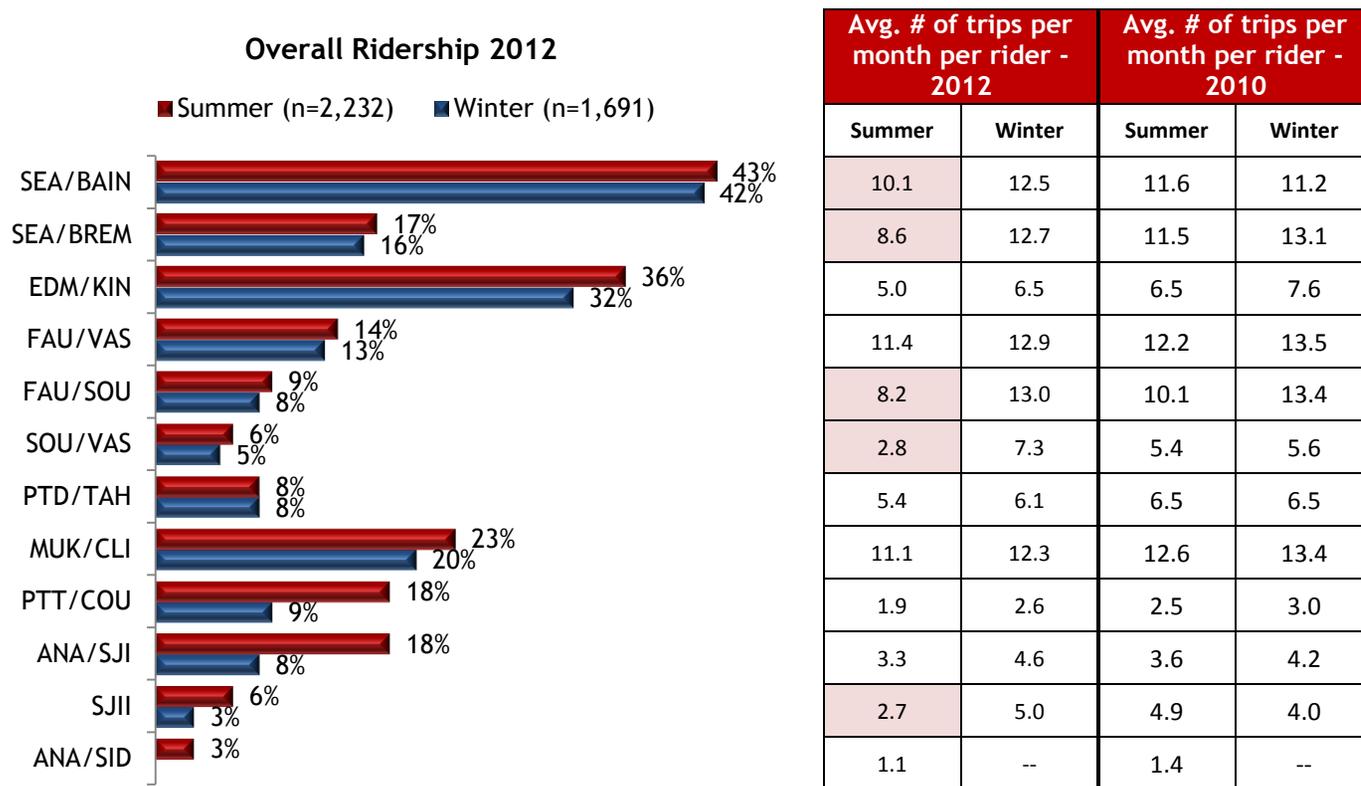


Figure 1: Overall Ridership

Boarding Method & Purpose

Respondents were also asked regarding the specifics of their most recent ferry trip, detailing the boarding method, vehicle type and the purpose of their trip.

- ❖ Overall, the majority of 2012 riders board the ferry in a vehicle, either as a driver or passenger (below left). Of those boarding in a vehicle, the majority of riders did so in an auto, SUV or pickup between 14' – 22' in length.
- ❖ The distribution of commuting trips compared to recreational trips in 2012 confirms the heavier recreational traffic WSF sees during the summer period, with one in four traveling for this purpose (below right).

Boarding Method of Last Ferry Ride 2012

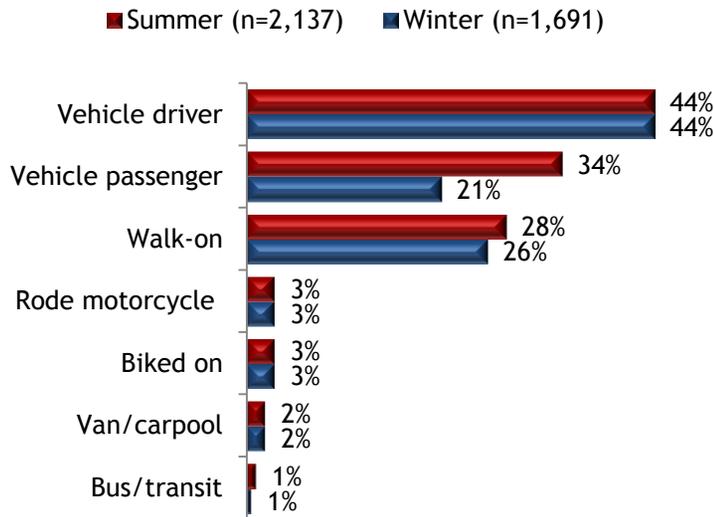


Figure 2: Boarding Method of Last Ferry Ride

% of Trips by Purpose 2012

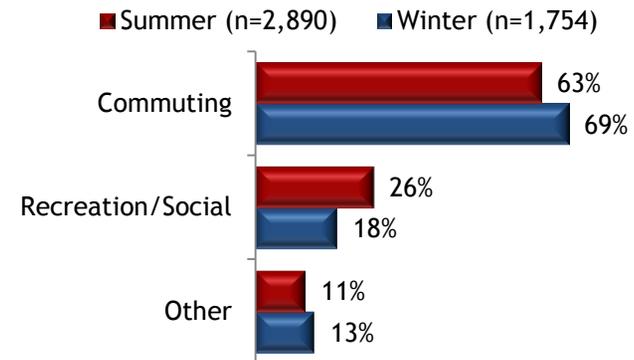


Figure 3: % of Trips by Purpose

Relative Boarding Method by Route

2012 Winter Customer Survey participants were asked to provide the average number of trips taken for each route they took during the period, as well as the average number of trips for each boarding method.

- ❖ During the 2012 winter ridership period, Seattle/Bremerton (72%) and Seattle/Bainbridge (61%) have the highest proportion of walk-on travelers; on all other routes, drive-on is the primary boarding method (below).

Ratio of Trips per Month by Boarding Method - Winter 2012

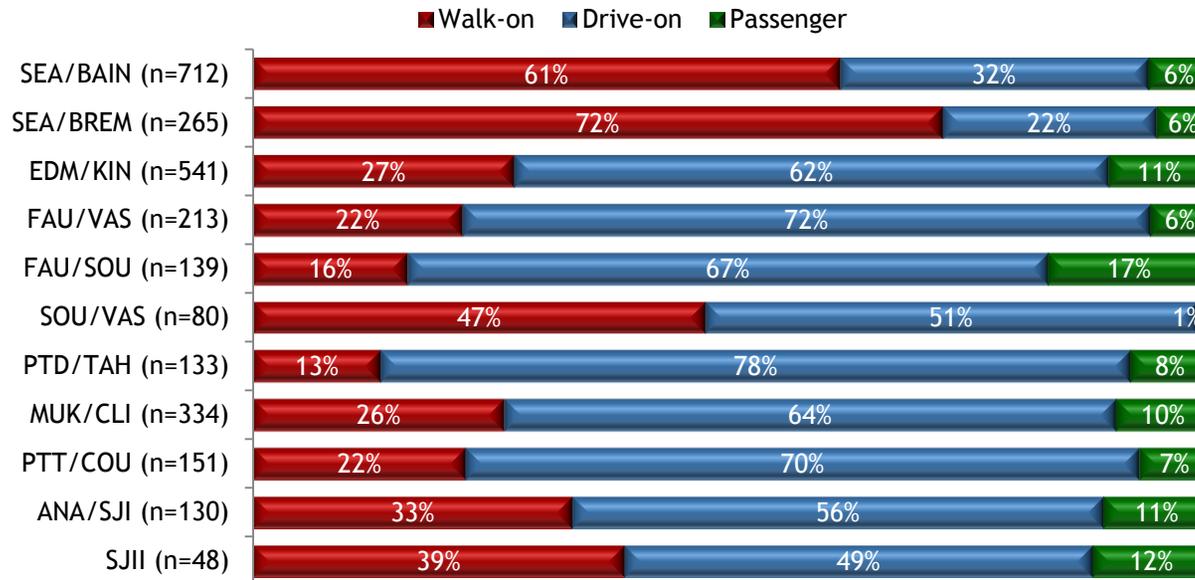


Figure 4: Ratio of Trips per Month by Boarding Method

Ticket Type & Multi-Ride Passes

Finally, riders were asked about the ticket they used on their most recent ferry trip, and whether or not they share multi-ride tickets with anyone under the age of 19.

- ❖ Single-ride and multi-ride tickets are by far the most common tickets used on riders' last trip using WSF. As expected, increased recreational ridership during the 2012 summer period leads to an increased use of single-ride tickets, while those completing the 2012 Winter Customer Survey were significantly more likely to report utilizing a multi-ride ticket (below left).
- ❖ Among those using a multi-ride ticket, the vast majority say that they do not share their ticket with anyone under the age of 19.

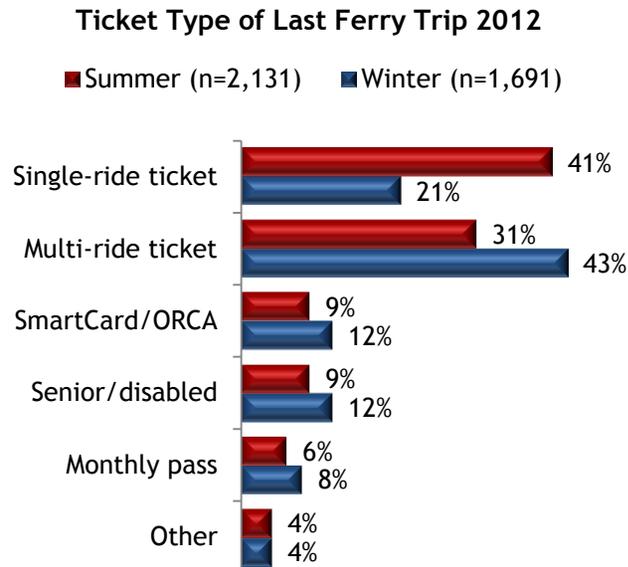


Figure 5: Ticket Type of Last Ferry Trip

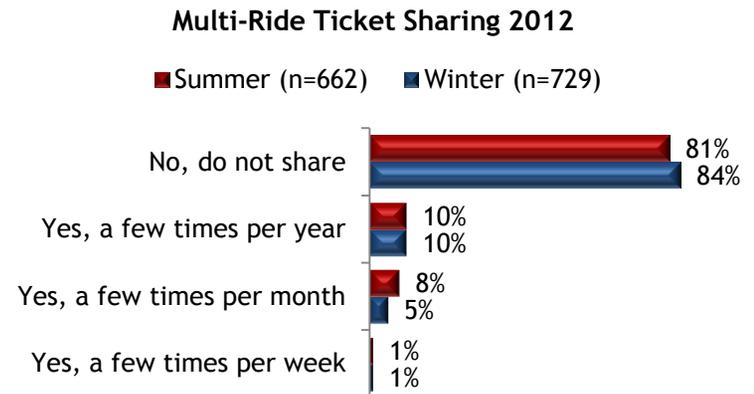


Figure 6: Multi-Ride Ticket Sharing

Actual & Expected Change in Ferry Ridership

Those responding to the 2012 Winter Customer Survey were asked to describe any changes in their overall ferry ridership and drive-on habits compared to one year ago, as well as any expected change to occur in the next two years.

- ❖ Ridership during the 2012 winter period is comparable to one year ago (below left). However, roughly one in five (16%) state they are riding the ferries less, primarily due to life changes that require less travel (below right).

Ridership Compared to a Year Ago - Winter 2012
(n=1,754)

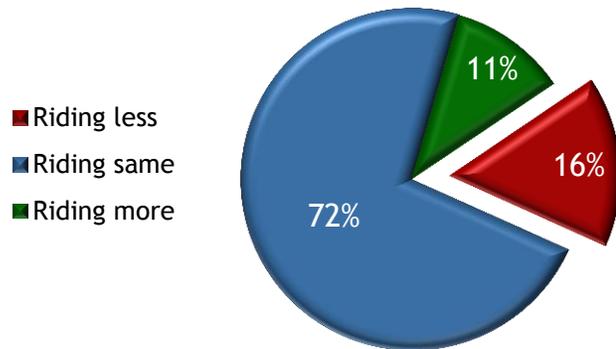


Figure 7: Ridership Compared to a Year Ago

Top Reasons for Less Ridership - Winter 2012	n=287
Less need to travel due to life circumstances	24%
Expensive/raising rates	15%
Changed jobs to a location that doesn't require as much ferry travel	14%
Started telecommuting/telecommute more	11%
Retired	11%
Moved to a location that doesn't require as much ferry travel	11%
Unemployed/employed part-time	10%

Table 1: Top Reasons for Less Ridership

- ❖ Compared to a year ago, one in four winter riders say they are driving onto the ferries less often in 2012, while just 10% say they do so more often (below top left).
- ❖ Ferry ridership is expected to remain relatively stable (below bottom left), with only 13% winter riders stating they plan to be riding the ferries less, primarily due to a move (23%) (below right).
 - As with current ridership decline, expensive/rising ferry costs (20%) is the second most common reason for a drop in expected future use (below right).

Driving Habits Compared to a Year Ago - Winter 2012
(n=1,691)

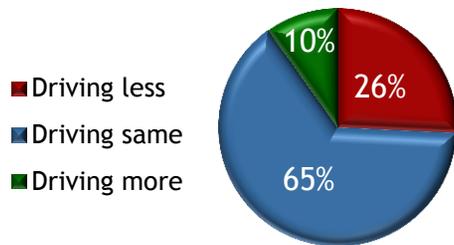


Figure 8: Driving Habits Compared to a Year Ago

Expected Ridership in Next 2 Years - Winter 2012
(n=1,754)

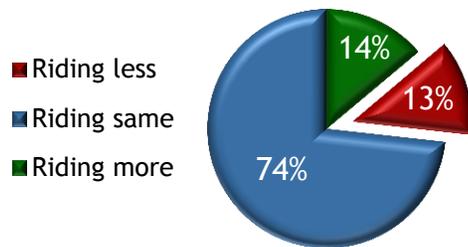


Figure 9: Expected Ridership in Next 2 Years

Top Reasons for Lower Expected Ridership - Winter 2012	n=220
Plan to move to a location that doesn't require as much ferry travel	23%
Expensive/rising rates	20%
Less need to travel due to life circumstances	14%
Plan to retire	13%
Plan to telecommute/will telecommute more	12%
Plan to change jobs to a location that doesn't require as much ferry travel	8%

Table 2: Top Reasons for Lower Expected Ridership

RECREATIONAL FERRY TRAVEL

Recreational Ferry Travel - Summary

Contains information regarding:

- ❖ Recreational ferry usage
- ❖ Recreational trip characteristics
- ❖ Recreational trip purpose & cost
- ❖ Future recreational ridership

Information gathered from the following surveys*:

Summer Customer Survey

F.R.O.G. panel members and on-board customer surveys

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

- ❖ Seattle/Bainbridge (27%), Edmonds/Kingston (17%) and Mukilteo/Clinton (16%) are the most common routes utilized for riders' most recent 2012 recreational or social trip during the summer period.
- ❖ The driving factors in choosing WSF for their last trip in summer 2012 include the fact that it was the fastest or most direct way (49%) or having no reasonable alternative (37%).
- ❖ Most (80%) report their last recreational or social trip in summer 2012 involved two crossings on the same route, and averaged about one day in length.
 - In addition, the vast majority (90%) say they stayed within Washington State on their most recent recreational or social trip using the ferries.
- ❖ Visiting family and friends (39%) and single-day sightseeing/hiking (16%) are the most common purposes of riders' last summer 2012 trip.
- ❖ The relative cost of ferry fare varies, with 40% saying it accounted for more than 25% of the total recreational or social trip cost during the summer 2012 period.
- ❖ Most (85%) of summer 2012 recreational/social riders say they "definitely would" be likely to use WSF again for their recreational trips.

Recreational Ferry Travel Habits/Activities – Detailed Findings

Recreational Ferry Usage

In order to better understand 2012 recreational riders, respondents of the Summer Customer Survey were asked several questions regarding their social and recreational travel using WSF. Most questions were in reference to riders’ most recent social or recreational trip, and were used to generate general characteristics of recreational ferry travel.

- ❖ Seattle/Bainbridge and Edmonds/Kingston remain the most commonly used routes for summer recreational/social travel (below right). Recreational summer ridership by route is consistent with 2010 summer findings.
- ❖ When asked what best describes the reason for choosing WSF for their last summer recreational/social trip, riders most commonly mentioned that it was the fastest/most direct way or that there was no reasonable alternative (below left).
 - While the top two factors remain in line with summer 2010 data, respondents in 2012 are slightly more likely to mention the ferries as the fastest/most direct way (49% vs. 45%) and less likely to mention having no reasonable alternative (37% vs. 41%).

Factors Determining Ferry Travel - Summer 2012
(n=2,136)

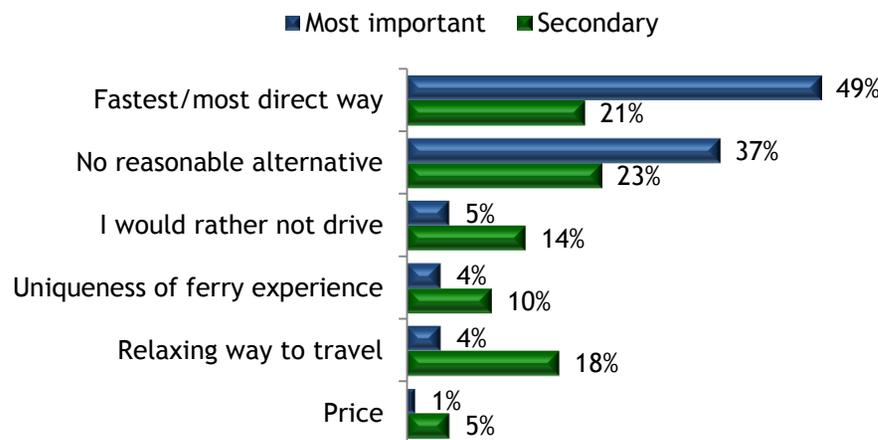


Figure 10: Factors Determining Ferry Travel

Route of Last Recreational/Social Trip - Summer 2012
(n=2,133)

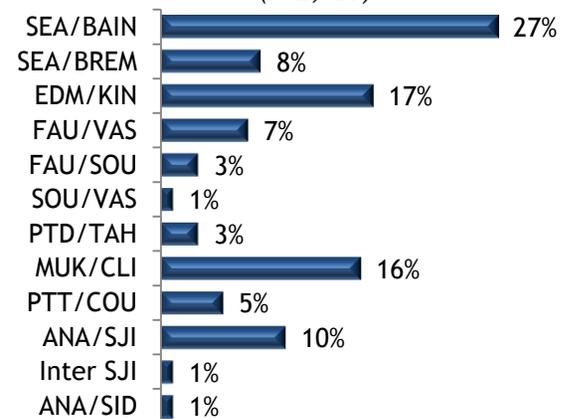


Figure 11: Route of Last Recreational/Social Trip

Recreational Trip Characteristics

2012 Summer Customer Survey respondents were also asked about the details of their last recreational or social trip involving the ferries, including the boarding method and ticket used. Answers to these questions are provided below.

- ❖ Recreational summer riders are most likely to board the ferry as a vehicle driver (44%) or passenger (32%) (below left). Of those driving onto the ferry, nearly three in four (71%) boarded in an auto, SUV or pickup between 14' – 22'.
- ❖ Single-ride (47%) and multi-ride user tickets (32%) are the most commonly utilized tickets for respondents' most recent summer recreational or social trip.
- ❖ The vast majority (80%) report that their last summer recreational or social trip involved two crossings on the same route, and averaged roughly one day in length. Additionally, nearly all (90%) recreational/social riders completing the Summer Customer Survey say they stayed within Washington State during their last trip.
 - Both of these figures are consistent with 2010 findings, when 81% of riders' last recreational trip involved two crossings on the same route and 87% of recreational riders stayed within Washington State.

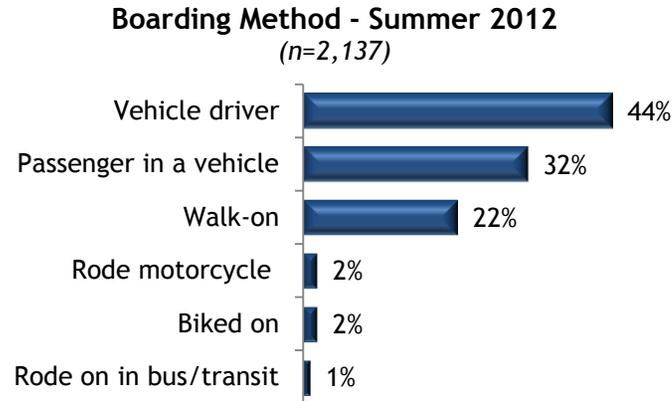


Figure 12: Boarding Method

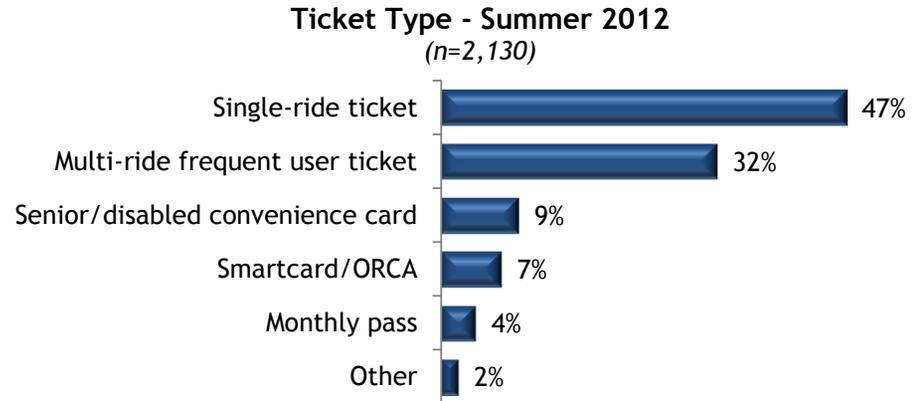


Figure 13: Ticket Type

Recreational Trip Purpose & Cost

To gain a better understanding of rationale driving ferry usage and the impact of ferry fares on riders' 2012 recreational trips, several questions in the Summer Customer Survey also focused on such issues.

- ❖ Visiting family friends (39%) and single-day sightseeing/hiking trips (16%) are the most common reasons for respondents' last summer recreational/social trip using WSF (below left). These figures are down from 47% in summer 2010.
- ❖ Consistent with summer 2010, the relative price of ferry fare compared to the overall cost of the recreational/social trip varies, with 40% saying the fare accounted for more than 25% of the total cost. Ferry cost is less of a factor among respondents surveyed onboard the ferries, with nearly half (45%) saying ferry fare accounted for less than 10% of the total trip cost (below right).
 - On-board surveys data reflects the more infrequent, out-of-area summer recreational and social riders, which may help explain why the ferry fares accounted for less of the trip's overall cost compared to regular F.R.O.G. members.



Figure 14: Purpose of Last Recreational/Social Trip

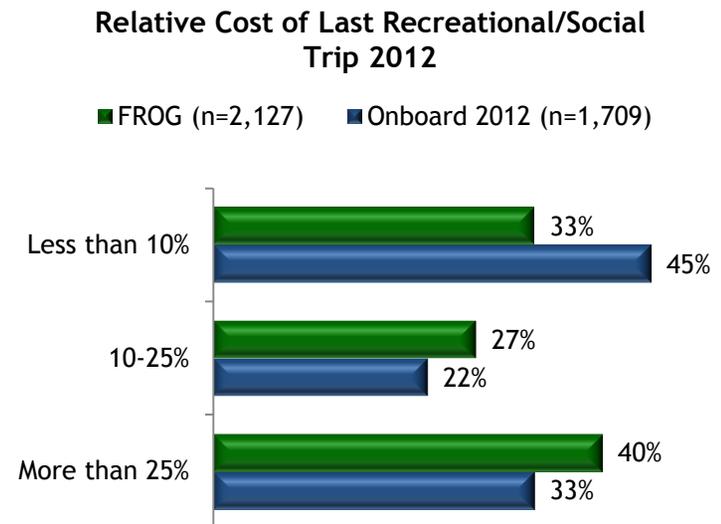


Figure 15: Relative Cost of Last Recreational/Social Trip

Future Recreational Ridership

To assist in projecting future summer recreational ridership, both recreational and non-recreational 2012 riders were asked about the likelihood of using WSF for recreational/social trips in the future. Additionally, suggestions were fielded for encouraging more recreational use.

- ❖ Nearly all (85%) summer recreational/social riders say they “definitely would” be likely to consider using WSF again for other recreational/social trips (below). Those saying they “definitely would” (85%) be likely to use WSF in the future remains high, and is consistent with those indicating the same in summer 2010 (87%).
- ❖ When asked what changes could influence more summer recreational/social trips using WSF, riders mention an increase in the number of ferry runs (20%), shorter ferry wait times (14%) and improved scheduling (13%).
 - An increased number of ferry runs (21%) was also the top suggestion for increasing summer recreational ridership in 2010.
- ❖ Of those not riding for recreational/social purposes in the 2012 summer period, two thirds (66%) also say they are not likely to do so in the coming months. Among these, the most common reasons for not expecting to take any social or recreational ferry trips include expensive ferry cost (34%) and riding WSF primarily for commuting purposes (32%).

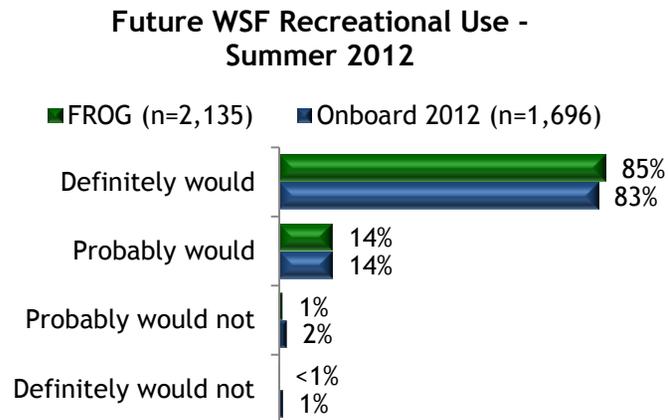


Figure 16: Future WSF Recreational Use

CUSTOMER SATISFACTION WITH FERRY PERFORMANCE

Customer Satisfaction with Ferry Performance - Summary

Contains information regarding:

- ❖ Satisfaction & perceived value
- ❖ Satisfaction with specific ferry attributes

Information gathered from the following surveys*:

Winter Customer Survey

F.R.O.G. panel members

Summer Customer Survey

F.R.O.G. panel members

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Overall Satisfaction

- ❖ During both the 2012 winter and summer periods, two thirds of riders are satisfied with WSF (dissatisfaction ranges from 17-22%), while one half rate it as a good value (poor value ratings between 12-15%). These figures are in line with historical data.

Ferry Feature & Service Satisfaction

- ❖ For the most part, satisfaction with ferry services and attributes remains high in 2012, with at least 70% of summer riders satisfied with 14 of the 20 tested attributes.
- ❖ WSF's largest opportunities in 2012 lie with "bathrooms on the ferries are clean and well-maintained" and "loading crews provide clear directions and/or hand signals."
 - "Efficiently processes vehicles through ticket lanes" and "vessels are well-maintained (not rusty) and safe (not cluttered)" are also rated as opportunities during the winter 2012 period.
- ❖ While of lower importance, WSF may have interest in focusing on terminals, as 2012 satisfaction is also lower than average for:
 - Terminals are clean and well-maintained
 - Terminals are comfortable
 - Adequate parking near terminal

Satisfaction, Value & Miscellaneous Ferry Issues – Detailed Findings

Satisfaction and Perceived Value

In order to gain a representative sample across all rider types and seasons, respondents to both the 2012 Winter and Summer Customer Surveys were asked to rate their overall satisfaction with Washington State Ferries. In addition, riders were asked about how they feel regarding the value of the WSF as a mode of transportation.

- ❖ In 2012, two in three report being satisfied with Washington State Ferries, a slight decrease from 2010, as satisfaction levels returned to 2008 levels (below left). Those answering surveys in-person aboard the ferries provide much higher satisfaction and value ratings.
- ❖ Half rate WSF as a good value during both the 2012 winter and summer travel periods, though just 14% rate it as a “very good” value (below right).
- ❖ Among 2012 recreational/social riders, the vast majority (92%) say WSF is either “somewhat” or “very important” in encouraging tourism in the Puget Sound region.

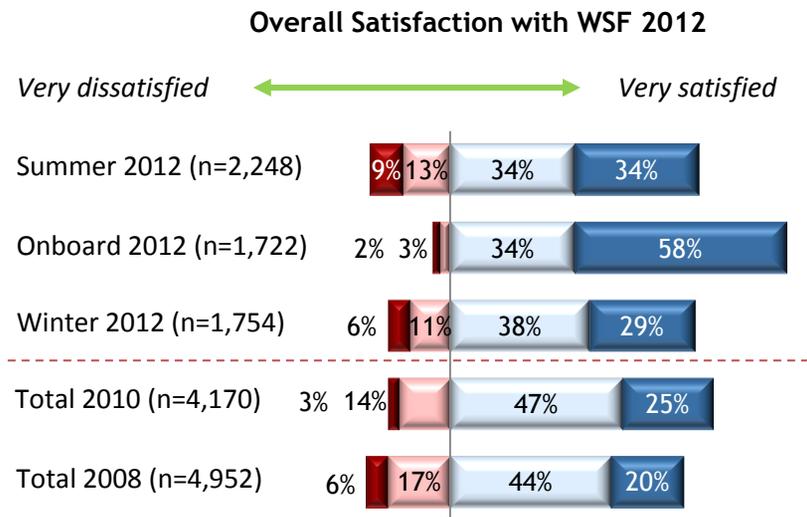


Figure 17: Overall Satisfaction with WSF

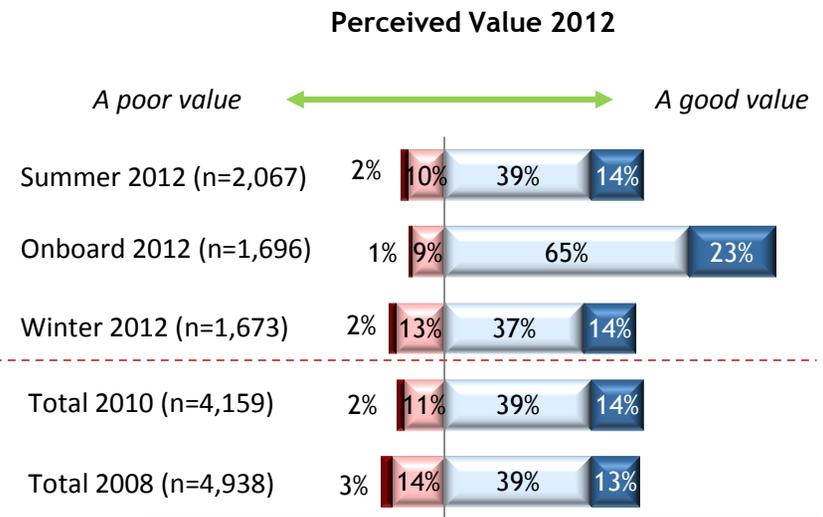


Figure 18: Perceived Value

Satisfaction with Specific Ferry Services

In addition to their satisfaction with WSF as a whole, 2012 respondents were asked to indicate their usage and satisfaction with specific ferry service aspects. Questions were also asked as to the importance of specific ferry attributes and services, and how respondents feel that WSF is performing on each. It is important to note that the list of tested on-board amenities was developed by current F.R.O.G. members and was altered slightly from the winter to summer survey.

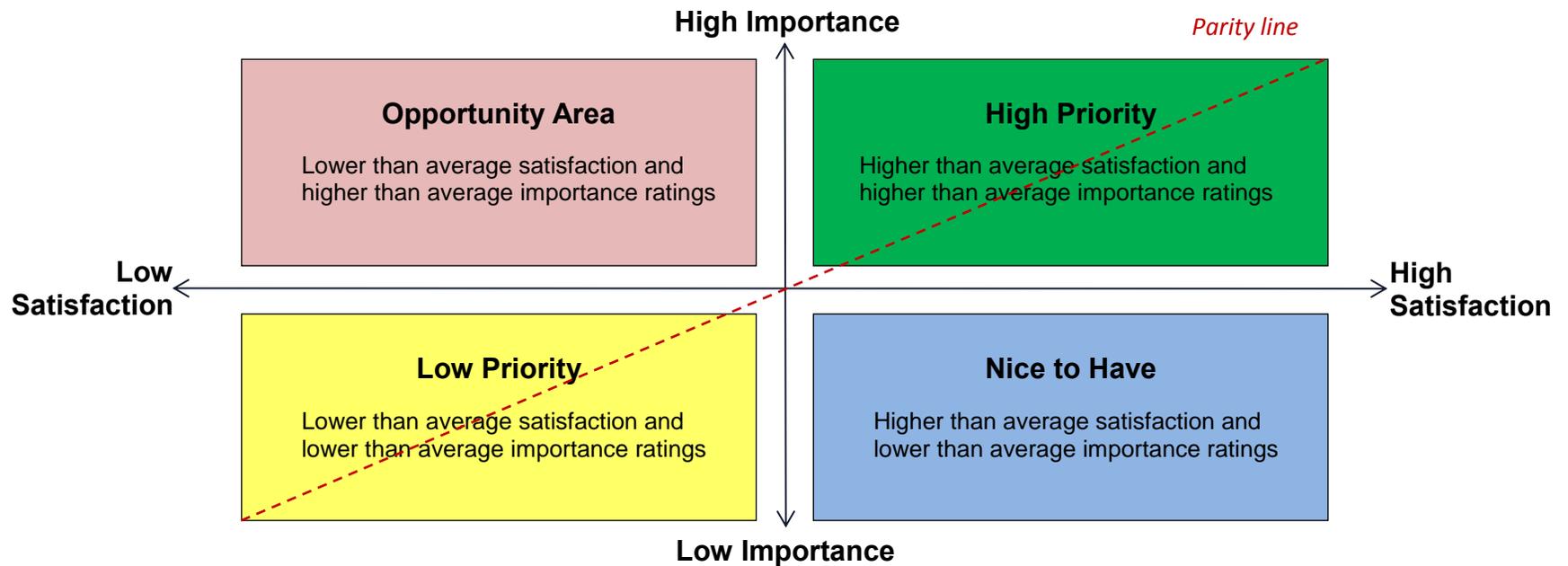
- ❖ Satisfaction among both 2012 winter and summer period respondents is above 80% for “vessel crew is friendly, courteous and polite,” as well as “vessel crew is helpful, competent and knowledgeable.”
- ❖ Dissatisfaction is the highest among 2012 riders for the following attributes:
 - Adequate parking near terminals (between 32%-37%)
 - Terminals are comfortable (between 15%-16%)
 - Loading crews provide clear directions and/or hand signals (between 11%-15%)
 - Efficiently processes vehicles through ticket lanes (between 11%-14%)
- ❖ WSF is outperforming expectations on the following metrics, as satisfaction is higher than average while importance is lower than average in 2012:
 - Unloading crew is friendly, courteous and polite (winter and summer)
 - Loads ferries to capacity with little room between cars (winter and summer)
 - Loading crew is friendly, courteous and polite (summer)
 - Unloading crews provide clear directions and/or hand signals (winter)
- ❖ 2012 winter riders tend to rate more features as areas of opportunity for improvement, as relative importance is higher than average and satisfaction is lower than average. According to current 2012 data, the areas in which WSF should focus more attention include:
 - Bathrooms on the ferries are clean and well-maintained (winter and summer)
 - Loading crews provide clear directions and/or hand signals (winter and summer)
 - Terminals are clean and well-maintained (winter)
 - Efficiently processes vehicles through ticket lanes (winter)
 - Vessels are well-maintained (not rusty/dirty) and safe (not cluttered) (winter)

The following section outlines the relative importance and satisfaction of specific ferry features among riders during the 2012 summer and winter ridership periods. Features considered highly important, but with low satisfaction (top left) indicate opportunity areas for WSF to improve overall customer service. Additionally, each quad chart is overlaid with a parity line, which represents where importance and satisfaction are equal, and identifies the ferry attributes with the greatest disparity between importance and satisfaction.

The next page provides the satisfaction and dissatisfaction ratings provided for each tested feature for both the winter and summer ridership periods. Cell shading indicates the quadrant in which the feature falls, as described above.

For each attribute falling into the “opportunity area,” a more detailed snapshot is provided following the quad chart, detailing importance, satisfaction and dissatisfaction by route, as well as respondents’ verbatim comments explaining reasons for their dissatisfaction. This outline of the quad chart and detailed information for “opportunity area” features is replicated for both the winter and summer ridership periods.

Additionally, route-specific relative importance/satisfaction ratings, as well as detailed snapshots for each tested attribute as described above, can be found in the technical reports for the [Winter Customer Survey](#) and [Summer Customer Survey](#), which are included on the enclosed CD.



Those responding to the 2012 Winter Customer Survey, as compared to summer survey respondents, tend to rate WSF’s customer service more poorly, with several attributes falling in the “opportunity area” (red). Across both surveys, riders indicate that WSF should focus on loading crews providing clear directions/hand signals, as well as on-board bathroom cleanliness. On the other hand, WSF’s strengths in 2012 appear to lie with items such as the vessel crews (friendly and helpful) and unloading procedures.

While viewed as less important, WSF may significantly improve rider satisfaction by also focusing on terminals, specifically cleanliness, comfort and the availability of parking.

Code	Attributes	Winter 2012		Summer 2012	
		Satisfied	Dissatisfied	Satisfied	Dissatisfied
21	Vessel crew is friendly, courteous and polite	81%	6%	85%	5%
22	Vessel crew is helpful, competent and knowledgeable	81%	4%	84%	4%
18	Passenger seating areas are clean and comfortable	74%	7%	77%	5%
16	Unloading procedures are efficient	72%	9%	77%	7%
12	Loading procedures are efficient	68%	11%	74%	9%
6	Passenger loading procedures are efficient	68%	10%	71%	10%
5	Easy loading and unloading for walk-on	68%	13%	70%	11%
17	Unloading crews provide clear directions and/or hand signals	74%	4%	77%	4%
15	Unloading crew is friendly, courteous and polite	74%	4%	78%	3%
13	Loads ferries to capacity with little room between cars	69%	11%	73%	9%
7	Passenger unloading procedures are efficient	66%	12%	71%	9%
11	Loading crew is friendly, courteous and polite	65%	9%	71%	7%
2	Terminals are comfortable	54%	16%	51%	15%
3	Schedule is adequately coordinated with transit services at terminal	40%	19%	42%	18%
4	Adequate parking near terminals	30%	37%	34%	32%
19	Bathrooms on the ferries are clean and well maintained	67%	11%	68%	10%
20	Vessels are well maintained (not rusty/dirty) and safe (not cluttered)	67%	10%	71%	9%
1	Terminals are clean and well maintained	66%	9%	65%	9%
10	Efficiently processes vehicles through ticket lanes	65%	14%	70%	11%
14	Loading crews provide clear directions and/or hand signals	61%	15%	67%	11%

Table 3: Ferry Attribute Satisfaction

Winter Customer Survey Satisfaction

Overall, clear directions/hand signals by the loading crew (attribute number 14), efficiently processing through ticket lanes (10), maintained and safe vessels (20) and clean and well-maintained bathrooms (19) and terminals (1) show the opportunity for improvement according to 2012 Winter Customer Survey riders.

The following pages provide greater detail on the ratings provided on these attributes by route, as well as specific verbatim comments regarding reasons for low satisfaction with WSF on the five attributes falling in the opportunity area. Please refer to page 34 for a complete list of feature codes.

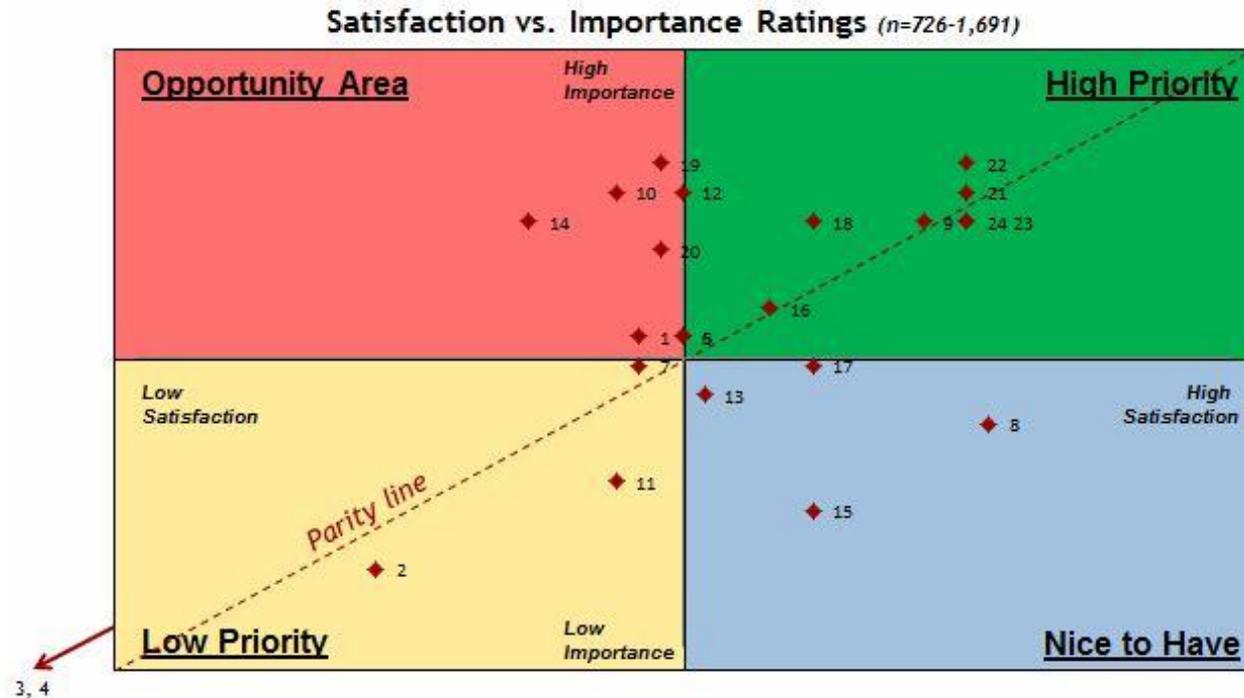


Figure 19: Satisfaction vs. Importance (Winter)

Winter Opportunity Area – Clear Loading Directions

- ❖ Overall, there is room for improvement in providing clear loading directions to drive-on and passenger riders during the 2012 winter ridership period. Roughly one in five Point Defiance/Tahlequah, Seattle/Bremerton and Fauntleroy/Vashon/Southworth riders are dissatisfied.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1496	SEA/ BAIN n=409	SEA/ BREM n=136	EDM/ KIN n=264	FAU/ VAS/ SOU n=225	PTD/ TAH n=46	MUK/ CLI n=288	PTT/ COU n=36	ANA/ SJI n=91
WSF loading crews provide clear directions and/or hand signals	Imp. (4-5)	95%	92%	93%	94%	97%	97%	97%	96%	96%
	Sat. (4-5)	61%	70%	53%	66%	52%	53%	53%	85%	60%
	Dissat. (1-2)	15%	10%	19%	12%	18%	22%	17%	9%	17%

Table 4: Clear Loading Directions (Winter)

Top Unsatisfactory Terminals n=218	Specific Complaints n=218
<p>30% Seattle</p> <p>21% Mukilteo</p> <p>17% Fauntleroy</p> <p>13% Clinton</p> <p>11% Edmonds/Bainbridge</p>	<ul style="list-style-type: none"> • Seattle: “Grumpy loading crew; give unclear directions then yell at drivers; witnessed many, many times; multiple people.” • Seattle/Bainbridge: “Sometimes the crew is talking to each other and not paying attention when cars are loading. With no signal from them, you don't know where to go, and if you get told too late to turn easily, they get rude.” • Fauntleroy: “They seem to be bored with their job and think everyone knows which lane they need. I noticed they treat travelers that are unfamiliar with procedures with disdain.” • Mukilteo: “Some workers give excellent directional signals and some assume you know how to proceed with a small gesture. We've experienced increased confusion between ferry workers...getting DIFFERENT directions from them as we drive onto the ferry.” • Clinton: “Unclear hand signals put me in opposite lane than what crew wanted. They became upset but I felt it was more them than me at fault.” • Mukilteo/Clinton: “Each crew person uses different signs and gestures to indicate which lane. It is dangerous. Some use limp gestures. Hand signals should be very decisive and sometimes over dramatic to be understood.” • Edmonds: “Hand signals aren't always clear, and deck crew isn't always courteous.”

Winter Opportunity Area – Efficiently Process Vehicles

- ❖ Among drive-on and passenger riders in winter 2012, efficiently processing vehicles presents an opportunity for improvement, primarily among riders of the Fauntleroy/Vashon/Southworth route, where one in five riders report being dissatisfied.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1496	SEA/ BAIN n=409	SEA/ BREM n=136	EDM/ KIN n=264	FAU/ VAS/ SOU n=225	PTD/ TAH n=46	MUK/ CLI n=288	PTT/ COU n=36	ANA/ SJI n=91
WSF efficiently processes vehicles through ticket lanes	Imp. (4-5)	96%	97%	95%	97%	94%	91%	97%	96%	96%
	Sat. (4-5)	65%	63%	69%	67%	57%	70%	69%	85%	65%
	Dissat. (1-2)	14%	13%	13%	13%	19%	11%	13%	7%	12%

Table 5: Efficiently Processes Vehicles (Winter)

Top Unsatisfactory Terminals n=204	Specific Complaints n=204
<p>33% Seattle</p> <p>24% Fauntleroy</p> <p>14% Mukilteo</p> <p>14% Kingston</p> <p>13% Bainbridge</p>	<ul style="list-style-type: none"> • Seattle: “The lack of clear direction allows vehicles to approach from alternate directions and get on in front of cars waiting for a light. Specifically north bound on Alaskan Way. Commonly, cars will take a free right into the toll booths from the north, and make it so northbound cars don’t have anywhere to go.” • Seattle/Bainbridge: “Where are those automated gates we paid for? What about those dedicated lanes for pre-ticketed vehicles?” • Fauntleroy: “During rush hour, cars get backed up on road. Southworth cars behind Vashon cars can’t get on ferries. Bigger ferries on run might help.” • Fauntleroy: “There should be a separate lane for drivers who already have their ticket, rather than holding up the whole line while someone buys a ticket. Also, we need the state trooper back to stop traffic on Fauntleroy Way SW while vessels discharge cars.” • Kingston: “There are three ticket booths. One lane seems to use both booths, while the other lane uses one. This leads to an inequity in being able to board when you are close to the end of the line.” • Kingston: “Attendants not paying attention allowed a closed lane to board ahead of the vehicles waiting in line and thus those of us in line missed the boat after waiting for 15 minutes. This has happened three times on the Kingston side. Also, the ferry crew lowered the gate three minutes before sailing time which shouldn’t happen.”

Winter Opportunity Area – Vessels are Maintained & Safe

- ❖ Among all winter 2012 ferry riders, more than one in five Seattle/Bremerton and Anacortes/San Juan Island riders disagree that the vessels are well-maintained and safe.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1691	SEA/ BAIN n=483	SEA/ BREM n=189	EDM/ KIN n=280	FAU/ VAS/ SOU n=250	PTD/ TAH n=46	MUK/ CLI n=304	PTT/ COU n=39	ANA/ SJI n=99
WSF vessels are well maintained (not rusty/dirty) and safe (not cluttered)	Imp. (4-5)	94%	94%	90%	94%	94%	94%	96%	95%	91%
	Sat. (4-5)	67%	69%	42%	77%	69%	83%	70%	84%	48%
	Dissat. (1-2)	10%	8%	27%	6%	4%	0%	8%	0%	22%

Table 6: Vessels are Maintained & Safe (Winter)

Top Unsatisfactory Vessels n=165	Specific Complaints n=165
<p>14% Kitsap</p> <p>12% Kaleetan/Hyak</p> <p>9% Chelan</p> <p>8% Walla Walla</p> <p>6% Wenatchee/Sealth</p>	<ul style="list-style-type: none"> • Kitsap/Kaleetan: “Obvious exterior rust and dirt. Looks junky, and does not inspire trust.” • Kitsap/Kaleetan/Chelan/Hyak/Walla Walla: “Rust is visible on every surface, probably not on critical surfaces, but nonetheless visible, which means maintenance has been avoided. Overhead lamps are constantly burned out.” • Kitsap/Chelan: “The Kitsap and Chelan are rust buckets and should be scrapped.” • Kitsap/Chelan/Hyak/Sealth: “These boats are old and run-down, the Hyak was completely covered in rust till it was painted about a year ago. Furnishings are worn and dirty, restrooms generally filthy, Bremerton run always gets the scuzziest boats in the fleet.” • Wenatchee/Tacoma: “Rusty, paint peeling, dirty floors, dirty restrooms.” • Sealth/Evergreen: “The overall appearance of many of the boats shows a lack of care and regular maintenance.”

Winter Opportunity Area – Bathrooms are Clean & Maintained

- ❖ Again, among those who used the vessel passenger deck area, winter 2012 riders on the Seattle/Bremerton route are also the most dissatisfied with the cleanliness and maintenance of on-boat bathrooms. Vessels with the highest dissatisfaction include Walla Walla (15%), Kitsap (15%), Kaleetan (14%) and Wenatchee (13%).

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1574	SEA/ BAIN n=464	SEA/ BREM n=174	EDM/ KIN n=255	FAU/ VAS/ SOU n=238	PTD/ TAH n=39	MUK/ CLI n=272	PTT/ COU n=38	ANA/ SJI n=95
The bathrooms on the ferries are clean and well maintained	Imp. (4-5)	97%	97%	95%	97%	96%	95%	98%	95%	97%
	Sat. (4-5)	67%	66%	35%	74%	76%	81%	70%	93%	65%
	Dissat. (1-2)	11%	13%	23%	8%	4%	0%	8%	5%	11%

Table 7: Bathrooms are Clean & Maintained (Winter)

Top Unsatisfactory Vessels n=167	Specific Complaints n=167
<p>15% Walla Walla/Kitsap</p> <p>14% Kaleetan</p> <p>13% Wenatchee</p> <p>11% Puyallup/Tacoma/Hyak</p> <p>9% Chelan</p>	<ul style="list-style-type: none"> • Walla Walla/Kitsap/Hyak: “They are generally in need of towels and toilet paper. There is always papers strewn on the floors.” • Walla Walla/Kitsap/Hyak/Chelan/Kaleetan: “Antiquated facilities... Odor is horrible and fans blow it everywhere. This is the worst part of the commute.” • Kaleetan/Kitsap/Hyak: “Toilet seats loose; stall doors fly open while using toilet; out of towels and/or soap, and or toilet paper.” • Wenatchee/Tacoma: “Smelly at times, faucets don’t always work. Not clear whom to call regarding cleanup issues.” • Wenatchee/Tacoma/Puyallup: “Many of the soap dispensers do not work or are empty. For the vessels with troughs instead of urinals, there is often debris left in the trough. The facilities are cleaned regularly, but not well. They need a deep cleaning more often.” • Chelan/Hyak: “Restrooms unkempt. Everything on the vessel is rusty feels unclean. Never see anyone cleaning or doing any general maintenance.”

Winter Opportunity Area – Terminals are Clean & Maintained

- ❖ Among those who went inside a ferry terminal during the 2012 winter travel period, those on the Seattle/Bainbridge and Seattle/Bremerton routes provide the highest dissatisfaction ratings for terminal cleanliness and maintenance. Two thirds (65%) of those dissatisfied experienced this dissatisfaction at the Seattle terminal.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1187	SEA/ BAIN n=401	SEA/ BREM n=144	EDM/ KIN n=167	FAU/ VAS/ SOU n=184	PTD/ TAH n=23*	MUK/ CLI n=176	PTT/ COU n=28*	ANA/ SJI n=64
Terminals are clean and well maintained	Imp. (4-5)	91%	93%	93%	91%	89%	71%	89%	93%	82%
	Sat. (4-5)	66%	57%	61%	74%	75%	72%	76%	88%	50%
	Dissat. (1-2)	9%	13%	11%	4%	3%	0%	5%	2%	17%

Table 8: Terminals are Clean & Maintained (Winter)

Top Unsatisfactory Terminals n=102	Specific Complaints n=102
<p>65% Seattle</p> <p>15% Bainbridge</p> <p>11% Anacortes</p> <p>8% Mukilteo</p> <p>7% Bremerton</p>	<ul style="list-style-type: none"> • Seattle: “Tables are dirty; seats are dirty; floors are dirty.” • Seattle: “General cleanliness and upkeep. Worn out furniture. Poor design for lining up to board.” • Seattle/Bainbridge: “The waiting area in Bainbridge is cold, not very comfortable. It’s amazing that with such pretty views of the water someone decided to use frosted glass that blocks all the views! The terminal in Seattle is stuffy, old and not particularly comfortable.” • Seattle/Bainbridge: “The terminals aren’t very modernized, especially the Bainbridge terminal. They look old and somewhat worn/dirty which makes the overall experience less enjoyable.” • Anacortes: “The shoddy condition overall of the terminal with now a very poor transitional fix. Seating is sparse and uncomfortable. often people have to stand since there is no seating. Now the new seating is home depot garden benches, reminiscent of an airport terminal.” • Anacortes: “Crowded, neglected seating (torn, patched, etc.).” • Mukilteo: “Terminal is old, and restrooms are in horrible condition.”

Summer Customer Survey Satisfaction

2012 Summer Customer Survey respondents provide fewer opportunity areas for WSF to improve, though clear directions/hand signals by the loading crew (attribute number 14) and clean and well-maintained bathrooms (19) and terminals (1) are still considered areas of potential focus.

The following pages provide greater detail on the ratings provided for these attributes by route, as well as specific verbatim comments regarding reasons for low satisfaction with WSF on the attributes falling in the opportunity area. Please refer to page 34 for a complete list of feature codes.

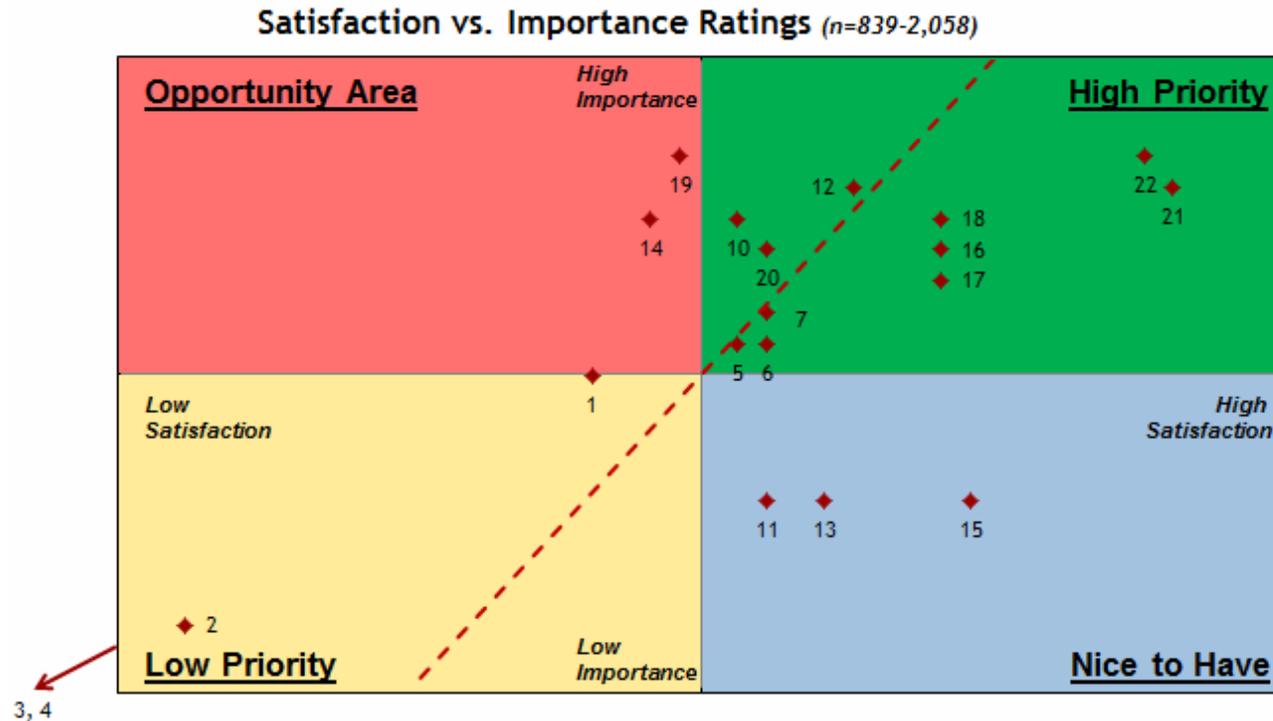


Figure 20: Satisfaction vs. Importance (Summer)

Summer Opportunity Area – Clear Loading Directions

- ❖ According to 2012 summer period riders, there is room for improvement in providing clear loading directions to drive-on and passenger riders. Seattle (24%) and Mukilteo (19%) are the most commonly reported terminals at which dissatisfaction occurred.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1821	SEA/ BAIN n=475	SEA/ BREM n=143	EDM/ KIN n=322	FAU/ VAS/ SOU n=226	PTD/ TAH n=55	MUK/ CLI n=324	PTT/ COU n=69	ANA/ SJI/SID n=206
WSF loading crews provide clear directions and/or hand signals	Imp. (4-5)	95%	95%	93%	97%	97%	96%	96%	90%	96%
	Sat. (4-5)	67%	75%	61%	73%	58%	46%	61%	77%	66%
	Dissat. (1-2)	11%	7%	14%	9%	14%	19%	14%	5%	16%

Table 9: Clear Loading Directions (Summer)

Top Unsatisfactory Terminals n=209	Specific Complaints n=209
<p>24% Seattle</p> <p>19% Mukilteo</p> <p>14% Clinton/Fauntleroy</p> <p>13% Edmonds</p> <p>10% Anacortes/Bremerton</p>	<ul style="list-style-type: none"> • Seattle: “A few loaders do not make eye contact and do not give clear signals in advance. This is annoying and dangerous.” • Mukilteo: “Boat crew needs much better communication with drivers. Often they are too busy talking to each other; very cursory wave - not sure what you meant?!” • Mukilteo/Clinton: “Confusing hand signals - some of the crew members use hand signals along with verbal commands. This is much more helpful.” • Seattle/Bainbridge: “Universally, loading personnel make vague, small hand gestures (or even just a single finger!) to indicate where drivers should go, without using eye contact. They get irritated if you don’t use ESP to learn where to go. It would be helpful if all loading personnel learned the SAME hand gestures for loading!” • Port Defiance/Tahlequah/Fauntleroy/Vashon: “Hand signals [are] not standard and hands [are] not always clearly visible in marginal lighting conditions.” • Coupeville/Pt. Townsend/Mukilteo/Clinton: “Hand signals and gestures vary between crew and are often unclear to the uninitiated, so tourists are often confused.”

Summer Opportunity Area – Bathrooms are Clean & Maintained

- ❖ Much like winter riders, those who used the vessel passenger deck area in the summer months say there is room for improvement in terms of the cleanliness and maintenance of on-boat bathrooms. The Kaleetan and Tacoma (12% each) are the least satisfactory vessels.

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1926	SEA/ BAIN n=520	SEA/ BREM n=193	EDM/ KIN n=331	FAU/ VAS/ SOU n=224	PTD/ TAH n=50	MUK/ CLI n=312	PTT/ COU n=76	ANA/ SJI/SID n=219
The bathrooms on the ferries are clean and well maintained	Imp. (4-5)	97%	96%	97%	98%	97%	96%	96%	96%	98%
	Sat. (4-5)	68%	66%	49%	71%	75%	84%	68%	87%	67%
	Dissat. (1-2)	10%	13%	19%	7%	4%	2%	9%	1%	10%

Table 10: Bathrooms are Clean & Maintained (Summer)

Top Unsatisfactory Vessels n=186	Specific Complaints n=186
<p>12% Kaleetan/Tacoma</p> <p>11% Wenatchee/Kitsap</p> <p>10% Puyallup</p> <p>9% Cathlamet</p> <p>8% Walla Walla</p>	<ul style="list-style-type: none"> • Wenatchee/Tacoma: “You have to hold your breath and step over puddles when visiting the men’s room.” • Wenatchee/Tacoma: “This is due to the poor ventilation in the male restroom on the 520, 620 and 705 Bl to Seattle ferries. The smell is horrible and often the paper towels are out.” • Cathlamet/Kittitas: “The ventilation in the restrooms is atrocious. They always smell like the monkey house at the zoo, and the smell wafts out into the cabin. This is not acceptable.” • Elwha: “I have had to ask the crew to put toilet paper and seat covers in the women’s bathroom. Does anyone check this?” • Kaleetan/Hyak: “Bathrooms are not very clean, old fixtures, rusty stalls, some stalls don’t lock, sometimes soap is missing and toilets don’t flush well.” • Kaleetan/Kitsap/Hyak/Walla Walla: “Bathrooms are always dirty and smelly. Often the toilet paper and hand towels are empty. Doors have suspicious dried liquid on the insides.” • Kittitas: “The garbage was overflowing in the women’s bathroom. One stall was out of service.”

Summer Opportunity Area – Terminals are Clean & Maintained

- ❖ Among those who went inside a ferry terminal in summer 2012, half of the riders dissatisfied with terminal cleanliness and maintenance report being dissatisfied at the Seattle terminal (51%).

Ratings on a 5-pt Scale (1=low; 5=high)		TOTAL n=1395	SEA/ BAIN n=422	SEA/ BREM n=159	EDM/ KIN n=186	FAU/ VAS/ SOU n=159	PTD/ TAH n=38	MUK/ CLI n=200	PTT/ COU n=64	ANA/ SJI/SID n=167
Terminals are clean and well maintained	Imp. (4-5)	90%	94%	92%	92%	92%	81%	90%	86%	80%
	Sat. (4-5)	65%	62%	54%	69%	79%	75%	70%	76%	49%
	Dissat. (1-2)	9%	11%	10%	8%	2%	2%	6%	6%	17%

Table 11: Terminals are Clean & Maintained (Summer)

Top Unsatisfactory Terminals n=124	Specific Complaints n=124
<p>51% Seattle</p> <p>21% Anacortes</p> <p>20% Bainbridge</p> <p>9% Mukilteo</p> <p>7% Edmonds</p>	<ul style="list-style-type: none"> • Seattle: “Bathroom availability - (closure and broken multiple times) and conditions (not cleaned nearly enough / smell).” • Seattle: “Bathrooms are quite dirty and smelly. Towel racks do not always work. I know the bathrooms are used by a ‘rough’ crowd at times, but I think they are worse than they need to be.” • Seattle/Bainbridge: “The bathrooms are always dingy at both terminals. Bainbridge is just in poor shape, clean but really dark, with wasted space and in need of upgrading. The passenger holding area, particularly the walkway, is worn out and probably not seismically safe. The Seattle terminal feels safe but is surrounded by homeless citizens and aggressive cab drivers. The parking spaces in the Seattle holding area feel like a warehouse lot.” • Mukilteo: “The terminal is antiquated, and doesn’t show well for tourism. Restrooms are underwhelming and extremely institutional. Very unattractive to any visitor. Commuters can and will live with it but they look like people don’t care. They also look like they’ve had extreme budget cuts.” • Seattle/Bainbridge: “Old. Poorly painted. Looks like a tired Greyhound bus depot.” • Coupeville: “Smelled like a sewer every time I have been in it for the past 7 years.” • Fauntleroy/Southworth: “Terminals not very clean/vending machines are frequently out of order.” • Anacortes: “Need more frequent vacuuming, painting, bathroom cleaning, especially during busy summer months.”

Customer Satisfaction & Use – WSF Website

- ❖ Roughly two in three have used the WSF website, though satisfaction is significantly higher among winter period riders than those responding in the summer (85% vs. 31%). This may be due to the fact that more infrequent, recreational riders attempted to utilize the ferry website during the summer period, and had trouble due to unfamiliarity.
- ❖ Among those dissatisfied, the commonly mentioned reason is a cumbersome and difficult to navigate user interface.

Used the WSF Website	Winter 2012 n=1754	Summer 2012 n=2072
		73%

Table 12: WSF Website Use & Satisfaction

Ratings on a 5-pt Scale (1=low; 5=high)		Winter 2012 n=1284	Summer 2012 n=1584
WSF website experience	Satisfied (4-5)	85%	31%
	Dissatisfied (1-2)	5%	58%

Specific Complaints

n=106

- “The service bulletins are not updated for unexpected delays often enough.”
- “Website was rather disorganized - it was hard to determine where to go to get info needed.”
- “Except for finding schedules, the website is challenging to navigate. I have difficulty finding most things I look for there.”
- “Used to be much easier to find schedules. Now, not so much. I find that I use the WSF iPhone app because it's so much simpler than the web site.”
- “Not simple to shortcut to specific route schedules and service status reports. I don't want to browse the whole site.”
- “For some reason I found it very difficult to find my ferry schedule. The link that seemed obvious, ‘ferry schedule’, led to other, more general info. The first time that has happened, it was very frustrating.”
- “The website has good features but is terribly organized. It is a total guessing game to go in and buy a ticket, check/manage multi-rides, etc. Wave2Go is by far the worst - the navigation is confusing and the interface is unprofessional. The mobile site is pretty bad too.”
- “The information I want is on the website but it is always hard to find. The layout of the site is poor and the links for important things are often a single word in a very small font and hard to find as they are all over the page and not well organized.”

Customer Satisfaction & Use – WSF Telephone Support

- ❖ As a percentage, few ferry riders have utilized WSF’s telephone support system in 2012. In real numbers, however, use could be as high as 175,000 individual customers a year (8% of 22 million riders). Those that have utilized WSF’s telephone support services report low satisfaction rates. Most of these are dissatisfied due to long wait times, difficult automated systems or poor/outdated information.

Used the WSF Telephone Support	Winter 2012 n=1754	Summer 2012 n=2072
		8%

Table 13: WSF Telephone Support Use & Satisfaction

Ratings on a 5-pt Scale (1=low; 5=high)		Winter 2012 n=138	Summer 2012 n=181
WSF telephone support experience	Satisfied (4-5)	18%	21%
	Dissatisfied (1-2)	74%	64%

Specific Complaints

n=58

- “Does not provide actual wait times at ferry docks. You are on hold long periods of time if you need to talk to anyone.”
- “The voice prompts seem to be longwinded/not efficient”
- “Could not get the phone answered.”
- “Had a hard time getting to a real person.”
- “I was trying to find information about a vessel that had broken down. The online vessel tracker showed it running along the line. I called to see if it was being put back into service. The person I talked to didn’t know what was going on. I knew more than she did.”
- “Messages were not up to date and really hard to get wait times at multiple terminals.”
- “Your automated system is about the worst that I have experienced.”
- “Not interested in hearing my concerns about passenger drop off conditions at the Bainbridge terminal.”

Attribute Satisfaction - Comparison by Route

The following three pages detail the route-specific satisfaction ratings provided by respondents for each tested ferry attribute between the Winter and Summer Customer Surveys. For reference, the overall 2012 summer importance rating is also provided, to help better gauge WSF's performance relative to expectations.

In order to more easily identify changes between the summer and winter ridership periods, changes in satisfaction of 5 percentage points or more are denoted by cell shading in the Summer 2012 column. Positive changes are shaded in green (summer satisfaction is at least 5% higher than winter) and negative changes in red (summer satisfaction is at least 5% lower than winter).

In addition, more detailed information can be found in the technical reports for both the [Winter Customer Survey](#) and [Summer Customer Survey](#), included on the enclosed CD. The following data can be found by referencing the winter and summer technical report files on the CD:

- ❖ Quadrant charts outlining relative importance and satisfaction of ferry attributes for riders of all routes
- ❖ Importance, satisfaction and dissatisfaction ratings for riders of each route for each tested ferry attribute
- ❖ Terminals or vessels receiving the most dissatisfaction ratings for each tested ferry attribute
- ❖ Example verbatim comments from riders explaining reasons for their dissatisfaction with each particular tested ferry attribute

In general, satisfaction is higher among 2012 summer period riders on the Seattle/Bainbridge and Seattle/Bremerton routes than those responding to the 2012 Winter Customer Survey. Shading below represents changes between ridership period of at least five percentage points (green = positive change, red = negative change).

% Satisfied on 5-pt. Scale (1=low; 5=high)	Importance Summer 2012	Satisfaction			
		SEA/BAIN		SEA/BREM	
		Winter '12	Summer '12	Winter '12	Summer '12
Bathrooms on the ferries are clean and well maintained	97%	66%	66%	35%	49%
Vessel crew is helpful, competent and knowledgeable	97%	82%	84%	74%	83%
Loading procedures are efficient	96%	69%	78%	64%	64%
Vessel crew is friendly, courteous and polite	96%	81%	87%	70%	83%
Loading crews provide clear directions and/or hand signals	95%	70%	75%	53%	61%
Passenger seating areas are clean and comfortable	95%	72%	77%	45%	56%
Unloading procedures are efficient	94%	69%	78%	69%	66%
Vessels are well maintained (not rusty/dirty) and safe (not cluttered)	94%	69%	73%	42%	48%
Unloading crews provide clear directions and/or hand signals	93%	77%	81%	72%	73%
Passenger unloading procedures are efficient	92%	59%	64%	67%	68%
Easy loading and unloading for walk-on	91%	62%	63%	77%	78%
Passenger loading procedures are efficient	91%	65%	68%	67%	72%
Terminals are clean and well maintained	90%	57%	62%	61%	54%
Loading crew is friendly, courteous and polite	86%	64%	68%	60%	63%
Loads ferries to capacity with little room between cars	86%	71%	76%	76%	62%
Unloading crew is friendly, courteous and polite	86%	76%	78%	69%	72%
Terminals are comfortable	82%	43%	42%	52%	53%
Sailing schedule is adequately coordinated with transit services available at the terminal	73%	42%	48%	38%	43%
Adequate parking near terminals	72%	32%	34%	29%	34%

Table 14: Attribute Satisfaction by Route (1)

Similarly, 2012 summer period riders provide higher satisfaction ratings for several ferry attributes than riders of the same routes during the winter ridership period.

% Satisfied on 5-pt. Scale (1=low; 5=high)	Importance Summer 2012	Satisfaction					
		EDM/KIN		FAU/VAS/SOU		PTD/TAH	
		Winter '12	Summer '12	Winter '12	Summer '12	Winter '12	Summer '12
Bathrooms on the ferries are clean and well maintained	97%	74%	71%	76%	75%	81%	84%
Vessel crew is helpful, competent and knowledgeable	97%	81%	85%	84%	83%	84%	81%
Loading procedures are efficient	96%	76%	84%	61%	68%	62%	63%
Vessel crew is friendly, courteous and polite	96%	77%	86%	85%	83%	84%	84%
Loading crews provide clear directions and/or hand signals	95%	66%	73%	52%	58%	53%	46%
Passenger seating areas are clean and comfortable	95%	79%	79%	81%	83%	83%	88%
Unloading procedures are efficient	94%	73%	82%	72%	76%	70%	71%
Vessels are well maintained (not rusty/dirty) and safe (not cluttered)	94%	77%	77%	69%	76%	83%	79%
Unloading crews provide clear directions and/or hand signals	93%	73%	82%	73%	76%	56%	68%
Passenger unloading procedures are efficient	92%	74%	82%	74%	77%	68%	81%
Easy loading and unloading for walk-on	91%	71%	82%	72%	74%	83%	82%
Passenger loading procedures are efficient	91%	74%	78%	73%	74%	68%	74%
Terminals are clean and well maintained	90%	74%	69%	75%	79%	72%	75%
Loading crew is friendly, courteous and polite	86%	65%	77%	67%	70%	72%	76%
Loads ferries to capacity with little room between cars	86%	75%	77%	60%	73%	62%	58%
Unloading crew is friendly, courteous and polite	86%	74%	81%	76%	77%	70%	72%
Terminals are comfortable	82%	55%	54%	61%	60%	62%	61%
Sailing schedule is adequately coordinated with transit services available at the terminal	73%	33%	35%	37%	41%	26%	29%
Adequate parking near terminals	72%	29%	40%	35%	30%	30%	29%

Table 15: Attribute Satisfaction by Route (2)

2012 summer riders of the Mukilteo/Clinton and Port Townsend/Coupeville routes tend to provide lower satisfaction ratings than their winter counterparts, especially for items related to the terminals (comfort and cleanliness). Due to small sample sizes, differences between the summer and winter period for the Anacortes/San Juan Islands route are not statistically significant.

% Satisfied on 5-pt. Scale (1=low; 5=high)	Importance Summer 2012	Satisfaction					
		MUK/CLI		PTT/COU		ANA/SJI	
		Winter '12	Summer '12	Winter '12	Summer '12	Winter '12	Summer '12
Bathrooms on the ferries are clean and well maintained	97%	70%	68%	93%	87%	65%	67%
Vessel crew is helpful, competent and knowledgeable	97%	85%	82%	90%	95%	72%	82%
Loading procedures are efficient	96%	71%	72%	70%	84%	55%	69%
Vessel crew is friendly, courteous and polite	96%	87%	82%	93%	93%	78%	85%
Loading crews provide clear directions and/or hand signals	95%	53%	61%	85%	77%	60%	66%
Passenger seating areas are clean and comfortable	95%	87%	81%	93%	89%	66%	73%
Unloading procedures are efficient	94%	79%	79%	70%	86%	64%	74%
Vessels are well maintained (not rusty/dirty) and safe (not cluttered)	94%	70%	73%	84%	88%	48%	60%
Unloading crews provide clear directions and/or hand signals	93%	75%	75%	88%	80%	69%	72%
Passenger unloading procedures are efficient	92%	71%	74%	80%	80%	55%	68%
Easy loading and unloading for walk-on	91%	63%	66%	80%	82%	62%	63%
Passenger loading procedures are efficient	91%	68%	72%	88%	77%	55%	63%
Terminals are clean and well maintained	90%	76%	70%	88%	76%	50%	49%
Loading crew is friendly, courteous and polite	86%	64%	70%	77%	82%	64%	71%
Loads ferries to capacity with little room between cars	86%	66%	69%	66%	83%	68%	74%
Unloading crew is friendly, courteous and polite	86%	76%	80%	72%	85%	73%	77%
Terminals are comfortable	82%	71%	64%	76%	67%	34%	39%
Sailing schedule is adequately coordinated with transit services available at the terminal	73%	53%	49%	70%	52%	16%	23%
Adequate parking near terminals	72%	18%	21%	46%	40%	38%	47%

Table 16: Attribute Satisfaction by Route (3)

IMPORTANT MISCELLANEOUS FERRY ISSUES

Important Miscellaneous Ferry Issues - Summary

Contains information regarding:

- ❖ Scheduling & transit connections
- ❖ Transit connections & discounts
- ❖ Fare structure by car size
- ❖ Proportionate fare increases
- ❖ Pre-paid passes & systems
- ❖ Influencing drive-on and walk-on traffic
- ❖ Impact of the Tacoma Narrows Bridge

Information gathered from the following surveys*:

Winter Customer Survey

F.R.O.G. panel members

Summer Customer Survey

F.R.O.G. panel members

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

- ❖ Most (66%) in 2012 do not use WSF in conjunction with other transit connections. Of those who do, one third (30%) say the ferry schedule does not adequately match their needed connections.
- ❖ Half (51%) in 2012 say a combined ferry & transit fare discount would cause no change in their plan to walk on the ferry. Meanwhile, one third (36%) say they would be at least “somewhat likely” to walk on the ferry should they receive a 30% discount on a combined ferry/bus ticket.
- ❖ 2012 riders are split on the idea of fare increases being higher for drivers than walk-ons, with 52% saying increases should be the same.
- ❖ The majority of 2012 Winter Customer Survey participants have either a Wave2Go (37%) or ORCA (36%) pass.
- ❖ In 2012, most (77%) support the current fare system over the proposed update to a vehicle Good2Go passes for electronic payment with unlimited passengers for WSF travel. However, respondents were also told this update would be accompanied by increased vehicle fare rates to offset lost passenger fare revenue.
- ❖ Among the one quarter taking a ferry trip in conjunction with the Tacoma Narrows Bridge, the majority (82%) say their travel would not change should they be charged an equal toll in both directions on the Tacoma Narrows Bridge.

Scheduling & Transit Connections

As part of the 2012 Summer Customer Survey, respondents were asked to provide suggestions regarding ferry scheduling as it pertains to their transportation needs. Additionally, details regarding riders' use of the ferries in tandem with other transit connections were collected, so as to better serve these riders' needs.

- ❖ Most riders in summer 2012 were not able to provide specific scheduling improvement suggestions to meet transportation needs, with an increased number of ferry runs (13%) topping the list (bottom left).
- ❖ Most (66%) do not use WSF in conjunction with other train/bus connections in summer 2012 (bottom right). However, of those using both WSF and other connections, one third (30%) report that the ferry schedule does not match their needed train/bus connections.

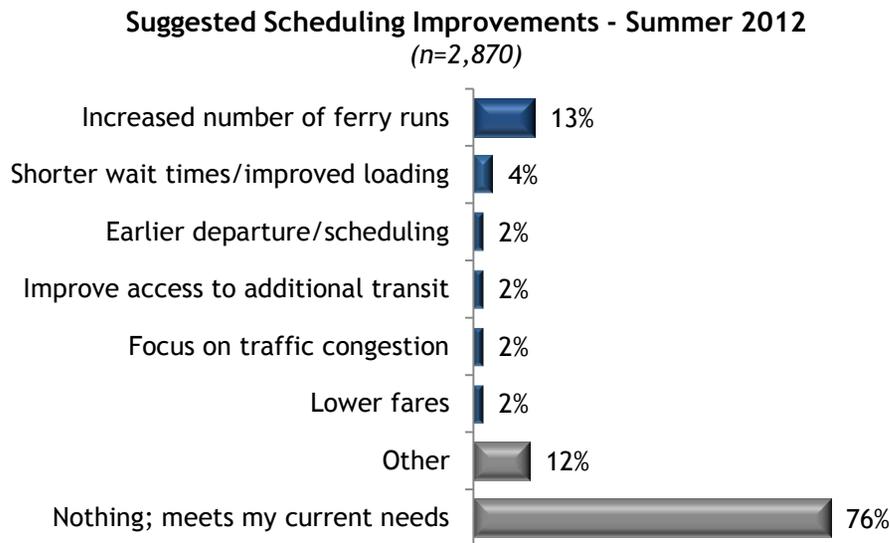


Figure 21: Suggested Scheduling Improvements

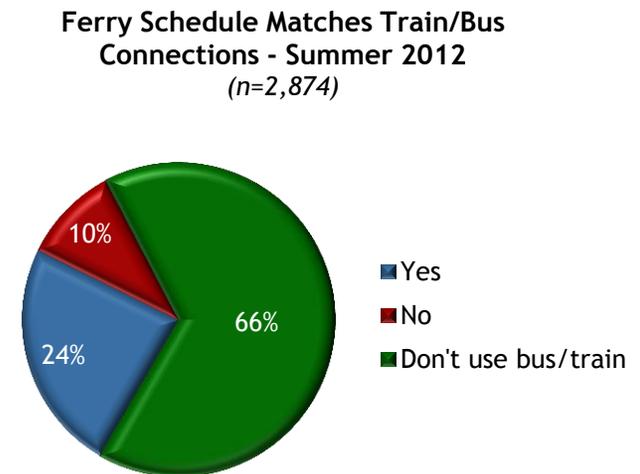


Figure 22: Ferry Schedule Matches Train/Bus Connections

Transit Connections & Discounts

During the 2012 Winter Customer Survey, riders were presented with potential ticket/fare strategies to encourage more walk-on traffic should use of additional transit connections be more accessible and affordable.

- ❖ Half (51%) of winter riders in 2012 say a combined ferry & transit fare discount via the ORCA Card would have no change on their use of public transportation; one third (32%) would be more likely to use transit and walk on (below left).
- ❖ Among winter drivers in 2012, one third (36%) say they would be at least somewhat more likely to walk on if they received a 30% discount on a combined ferry/bus ticket (below right).

Impact of Combined Fare Discount - Winter 2012
(n=1,754)

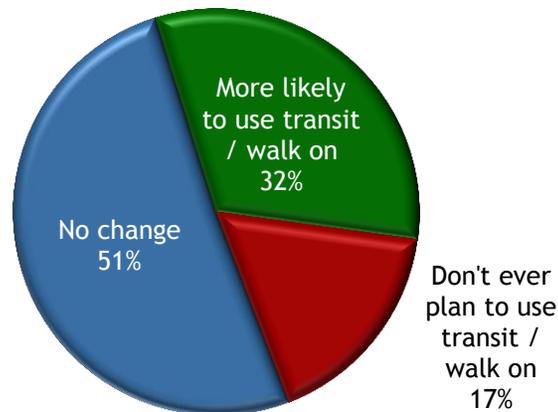


Figure 23: Impact of Combined Fare Discount

Impact of 30% Ferry/Bus Discount - Winter 2012
Among Those Driving On
(n=1,465)

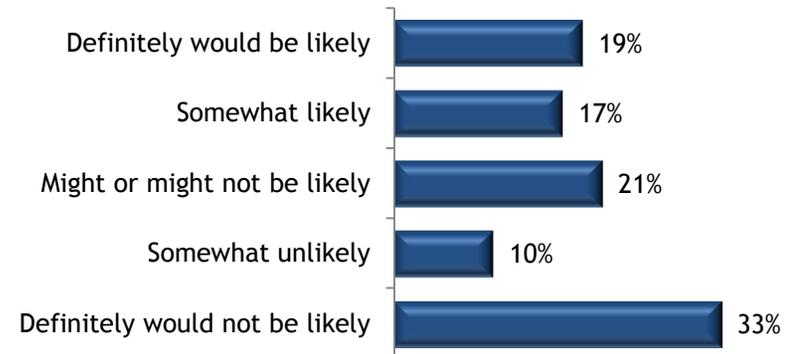


Figure 24: Impact of 30% Ferry/Bus Discount

Fare Structure by Car Size

The 2012 Winter Customer Survey also asked riders to share their thoughts on current and proposed vehicle fare structures, as well as their impact on any future vehicle purchase decision.

- ❖ The vast majority (72%) of 2012 winter period riders prefer the current vehicle fare structure based on car size category.
- ❖ In winter 2012, just less than half (46%) say a fare structure including a 30% discount for vehicles under 14' would have at least some influence on their next vehicle purchase.

Vehicle Fare Preference - Windows 2012
(n=1,754)

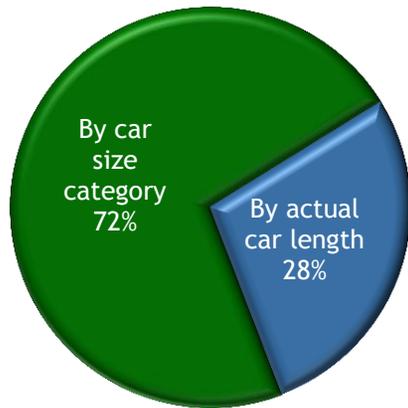


Figure 25: Vehicle Fare Preference

Fare Impact on Vehicle Purchase Decision - Winter 2012
(n=1,754)



Figure 26: Fare Impact on Vehicle Purchase Decision

Proportionate Fare Increases

2012 Winter Customer Survey participants were asked about their preference for fare increase strategies for walk-on vs. vehicle tickets in order to gauge customers' expected response to potential pricing updates. Additionally, 2012 Summer Customer Survey participants were asked their opinions regarding the current percentage of operating costs covered by fares.

- ❖ 2012 winter riders are split on the approach to increase vehicle fares at a higher rate than passenger/walk on rates; more than half (52%) say fare increases should be the same for both groups, while slightly fewer (46%) agree vehicle rate increases should be greater (below left).
- ❖ Of those saying vehicle fare percentage increases should be higher, most believe passenger fares should grow between $\frac{1}{4}$ (44%) and $\frac{1}{2}$ (33%) of the vehicle/driver fare (below right).
- ❖ Half (54%) of Summer 2012 participants believe the current fare coverage structure is adequate and should not be changed, in which fares account for 65% of the ferries' operating costs. This is consistent with 2010 data, when half (50%) agreed on the coverage level.
 - Of those that believe this rate should be increased (22% of the total), half (53%) say a coverage rate of 71-80% is preferred.
 - Of those that say the rate should be lowered (24% of the total), half (51%) agree a coverage rate between 41-50% is acceptable.

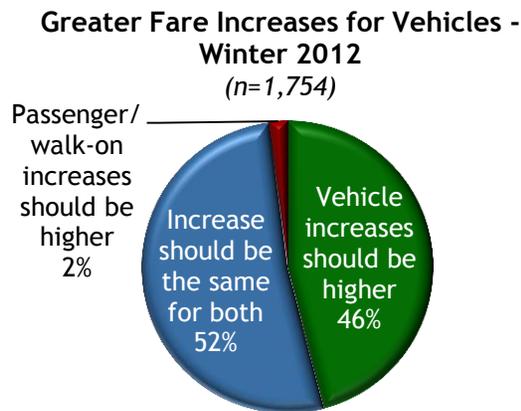


Figure 27: Greater Fare Increases for Vehicles

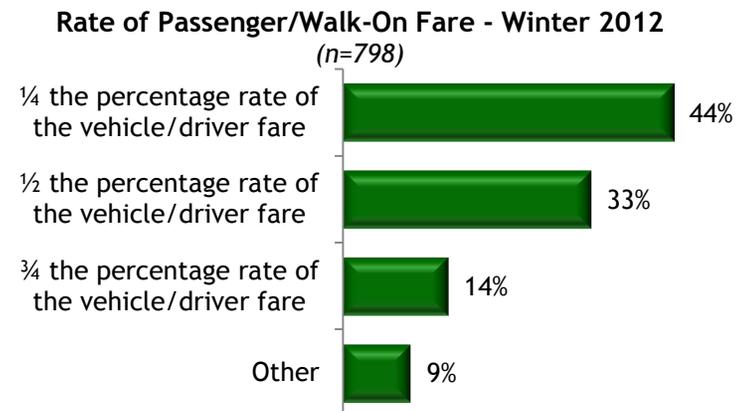


Figure 28: Rate of Passenger/Walk-On Fare

Pre-Paid Passes & Systems

The 2012 Winter Customer Survey also inquired about current pass ownership and the preference for payment systems. The proposed system enhanced the Good To Go payment methods to allow electronic payments and have any number of passengers in the vehicle at no additional charge, in addition to being able to be used on all toll roads and bridges. However, this option would also result in significantly increased vehicle fares to cover the loss of passenger fare revenue.

- ❖ Among 2012 winter period riders, Wave2Go (37%) and ORCA (36%) are the most commonly owned passes, followed by Good To Go passes (below left).
- ❖ After considering the proposed system, the majority (77%) in winter 2012 support the current fare system, as opposed to the updated Good To Go pass which would result in increased vehicle fares (below right).

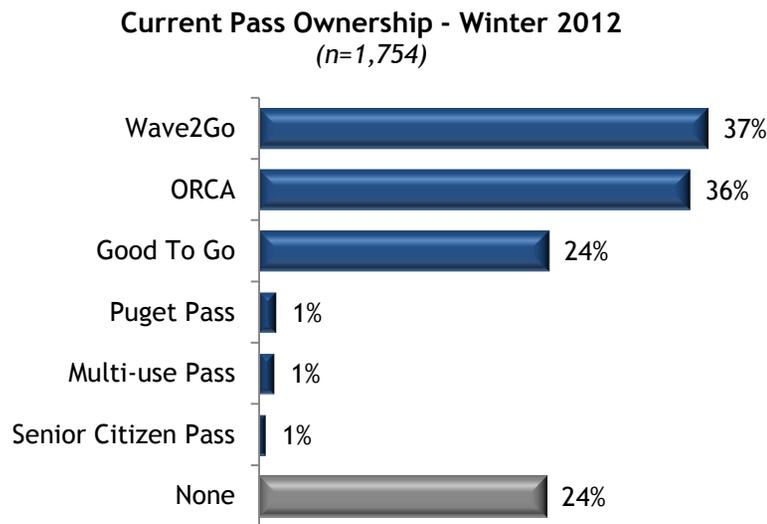


Figure 29: Current Pass Ownership

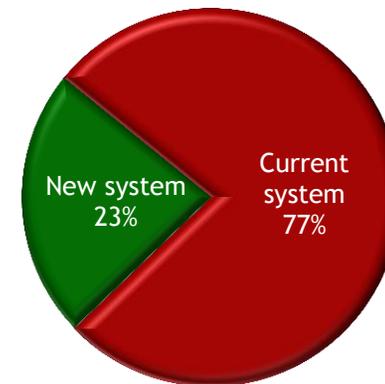
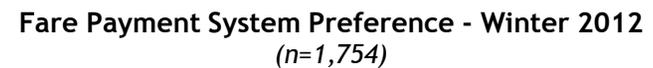


Figure 30: Fare Payment System Preference

Influencing Drive-On & Walk-On Traffic

The 2012 Winter Customer Survey also sought to understand the factors most influencing commuters to drive onto the ferry rather than walking on, as well as measuring the impact of potential changes to encourage more walk-on ferry travel among those using the ferries for commuting purposes.

- ❖ Work requirements (16%), convenience (13%) and lack of public transportation (12%) rank as the top primary reasons for driving on rather than walking on for commuting purposes in winter 2012. The ability to travel on one’s own timetable is also a significant secondary factor in the drive-on decision (24%) (below).
- ❖ Among commuters in winter 2012, access to, or integration with, mass transit (28%) is the main change that could influence riders to drive on less and walk on more for commuting trips. Additionally, one in five (20%) say they always walk on, using their vehicle only when absolutely necessary.

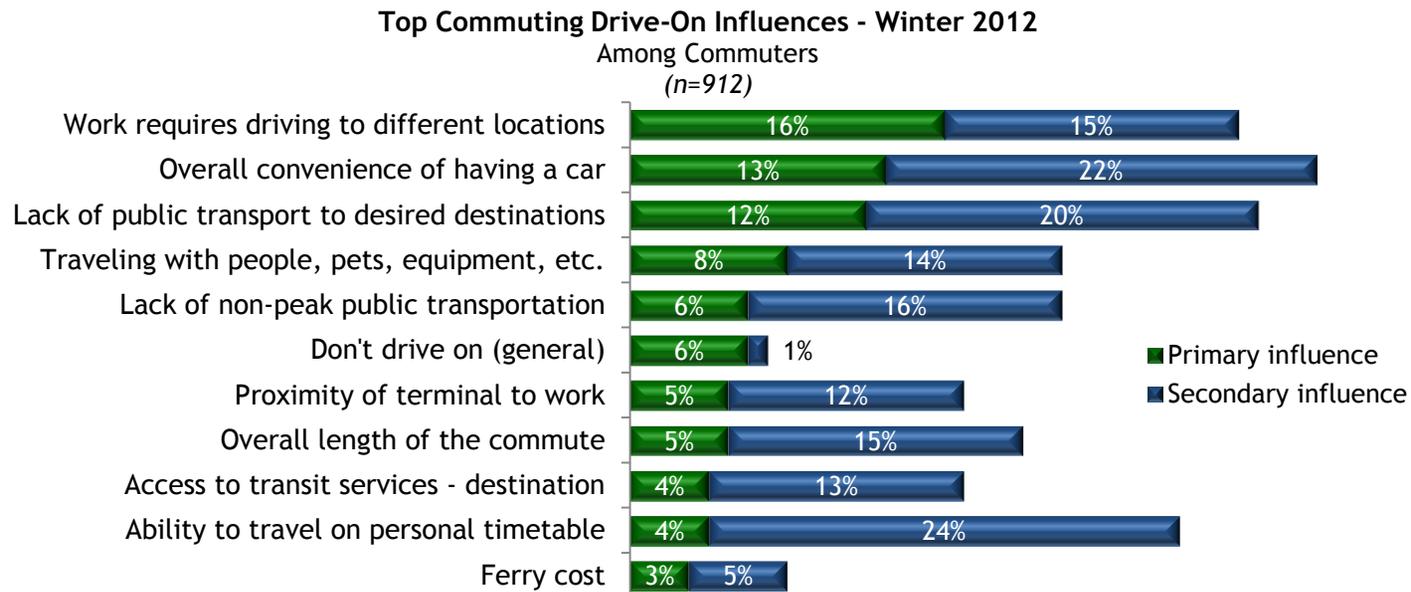


Figure 31: Top Commuting Drive-On Influencers

Impact of Tacoma Narrows Bridge

In order to understand riders' use of the ferry system in conjunction with the Tacoma Narrows Bridge, those responding to the 2012 Winter Customer Survey were asked about their ridership habits and expected impacts of potential toll changes on the bridge.

- ❖ In total, one quarter (26%) of all 2012 winter participants took at least one round trip using the Tacoma Narrows Bridge in conjunction with the ferries during the winter period (below left); half (50%) say they took less than one combined trip per month and 47% taking 1-5 trips/month.
- ❖ A significantly higher percentage of 2012 winter riders have used the Tacoma Narrows Bridge going westbound and the ferries going eastbound than those using the bridge eastbound and the ferries westbound (18% vs. 12%), which may be attributed to the lack of bridge tolls for riders travelling westbound (below left).
- ❖ Among those with a combined Tacoma Narrows Bridge and ferry trip in winter 2012, switching to an equal toll in both directions would cause no change for most (82%), meaning they would still be likely to utilize both the ferries and bridge for trips rather than choosing WSF exclusively due to increased Tacoma Narrows Bridge tolls (below right).

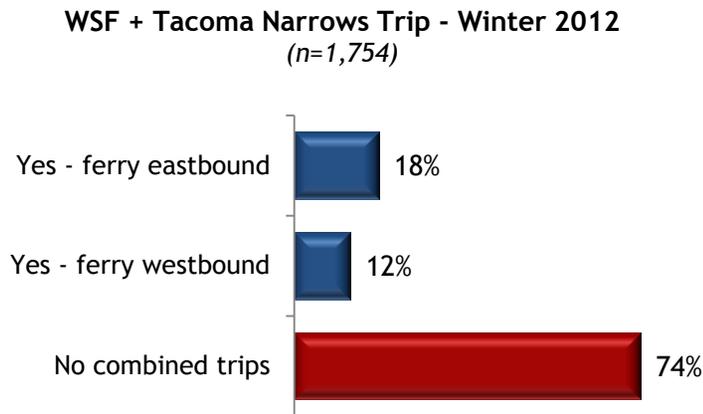


Figure 32: WSF + Tacoma Narrows Trip

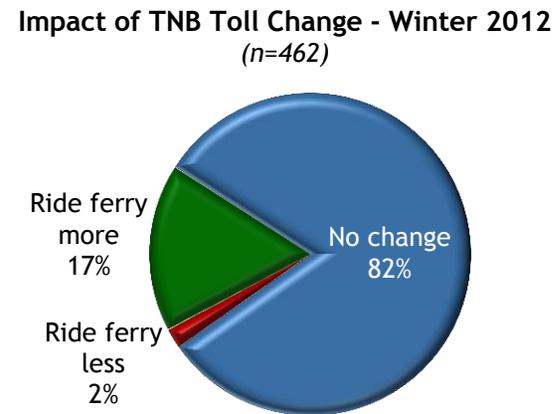


Figure 33: Impact of TNB Toll Change

FERRY RIDERSHIP CHARACTERISTICS

Ferry Ridership Characteristics - Summary

Contains information regarding:

- ❖ Respondent demographics
- ❖ Household ridership characteristics
- ❖ Weighting schemes

Information gathered from the following surveys*:

Winter Customer Survey

F.R.O.G. panel members

Summer Customer Survey

F.R.O.G. panel members

Key Findings:

- ❖ Among those responding to the 2012 Winter and Summer Customer Surveys, about three in four have been riding WSF for more than 10 years, with most panel members living within 10 miles of a ferry terminal.
- ❖ The median age of 2012 respondents is between 56-59 years of age, with just over half of all respondents being men.
- ❖ More than half of all 2012 respondents are employed full-time; about three in five report an annual income of \$75,000-\$149,999.
- ❖ During the winter ridership periods, panelists' other household members riding the ferries tend to take between 5-9 round trips per month, primarily boarding in a vehicle, either as the driver or passenger.
- ❖ In the winter period, it is reported that ridership by other household members has remained steady compared to the last year.

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Ferry Ridership Characteristics – Detailed Findings

Demographic Information – Winter & Summer Surveys

The demographic information below is representative of those F.R.O.G. panel members who completed the 2012 winter and summer surveys, and is compared to the same metrics from 2010.

- ❖ Roughly three in four have been riding WSF for more than 10 years, up slightly from the Winter and Summer Customer Surveys of 2010.
- ❖ Most F.R.O.G panel members surveyed live within 10 miles of the ferry terminal.

Years Riding WSF	Summer 2012 n=1,680	Winter 2012 n=1,676	Summer 2010 n=4,254	Winter 2010 n=4,171
Less than one year	--	--	2%	3%
1 year, but less than 3 years	1%	1%	5%	5%
3 years, but less than 6 years	6%	6%	9%	10%
6 years, but less than 10 years	17%	19%	10%	12%
More than 10 years	76%	74%	72%	71%

Distance from Ferry	Summer 2012 n=1,642	Winter 2012 n=1,568	Summer 2010 n=4,142	Winter 2010 n=4,168
Less than 1 mile	5%	6%	1%	1%
1-5 miles	32%	34%	36%	38%
6-10 miles	29%	28%	25%	27%
11-20 miles	18%	18%	19%	20%
Over 20 miles	15%	14%	19%	15%
<i>Median</i>	<i>8 miles</i>	<i>8 miles</i>	<i>10 miles</i>	<i>8 miles</i>

- ❖ Slightly more than half of those responding in 2012 were men, up from those represented in 2010.
- ❖ Those responding to the 2012 Winter Customer Survey tended to be older, with a median age of 59 years old, compared to 55-56 years of age for other survey periods.

Gender	Summer 2012 n=1,712	Winter 2012 n=1,574	Summer 2010 n=4,186	Winter 2010 n=4,169
Male	52%	54%	46%	48%
Female	48%	46%	54%	52%

Age	Summer 2012 n=732	Winter 2012 n=1,625	Summer 2010 n=1,522	Winter 2010 n=4,159
18-24	2%	1%	2%	2%
25-34	6%	4%	8%	8%
35-44	13%	9%	14%	13%
45-54	22%	22%	24%	24%
55-64	31%	35%	29%	34%
65+	25%	29%	23%	20%
<i>Median Age</i>	56	59	55	56

- ❖ More than half of all respondents are employed full-time, with roughly four in five having an annual household income of \$75,000-\$149,999. The 2012 surveys show a slight increase in those reporting the highest income range, \$150,000 or more per year.

Employment Status	Summer 2012 n=1,659	Winter 2012 n=1,578	Summer 2010 n=4,203	Winter 2010 n=4,111
Employed full-time	55%	55%	55%	56%
Employed part-time	12%	11%	11%	11%
Student/employed	1%	1%	1%	2%
Student/not employed	1%	<1%	1%	1%
Military personnel	--	--	<1%	1%
Retired	22%	24%	22%	20%
Homemaker	2%	1%	3%	3%
Not employed	2%	3%	2%	3%
Other	--	--	3%	4%

Annual Income	Summer 2012 n=1,382	Winter 2012 n=1,319	Summer 2010 n=3,423	Winter 2010 n=3,389
Under \$15,000	2%	2%	2%	2%
\$15,000-\$24,999	3%	4%	4%	4%
\$25,000-\$34,999	5%	5%	5%	6%
\$35,000-\$49,999	10%	9%	10%	10%
\$50,000-\$74,999	18%	18%	22%	19%
\$75,000-\$99,999	20%	20%	20%	21%
\$100,000-\$149,999	23%	23%	23%	22%
\$150,000 or more	18%	18%	16%	16%

Family Ridership Characteristics

Those responding to the 2012 Winter Customer Survey were also asked a series of questions to better understand the ferry travel habits of other members of their household. Information regarding this topic is detailed in the following pages.

- ❖ For the majority of respondents, one other household member travelled on the ferries during the 2012 winter ridership period.

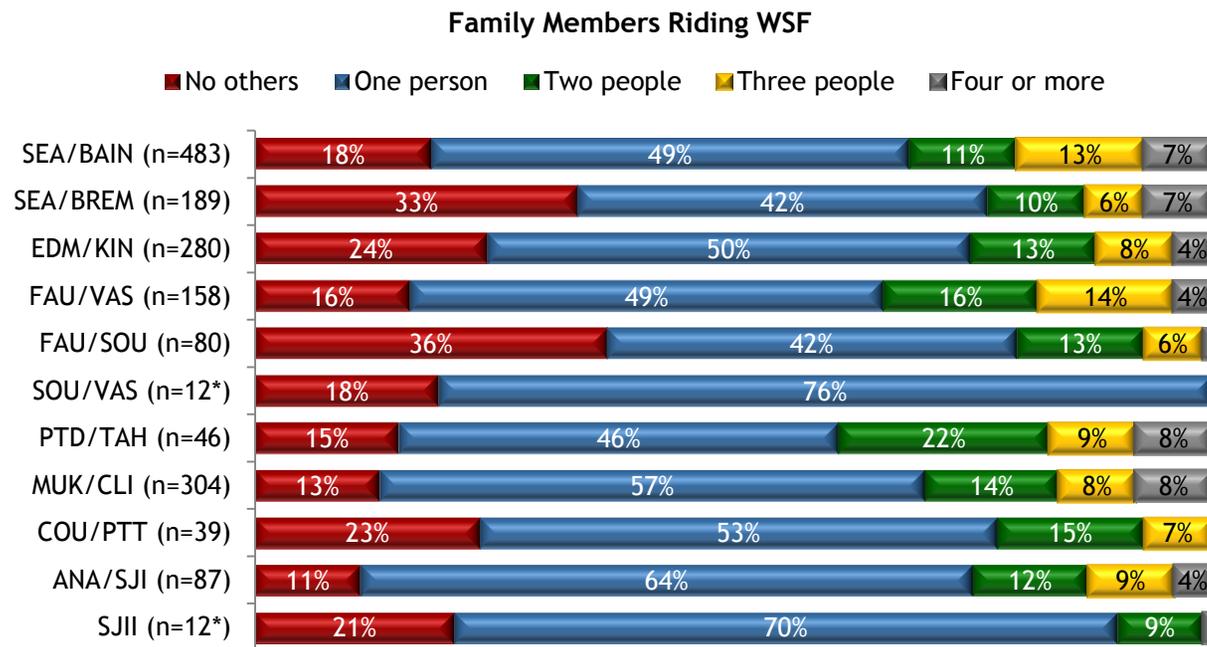


Figure 34: Family Members Riding WSF

- ❖ Other household members riding the ferries in winter 2012 tend to take between 5-9 round trips per month, and primarily board as either a vehicle driver or passenger.
- ❖ During the 2012 winter period, ridership by other household members is reported to be steady compared to last year.
- ❖ Among other household riders, single ride tickets tend to be the most common ticket type used in winter 2012.

Household Make-up	Respondent n=1691	Household Member 1 n=1341	Household Member 2 n=483	Household Member 3 n=264
Average Age	57	55	28	21
Average Round Trips per Month	15	9	6	5
Average % per Purpose	68% Commuting 18% Recreational/Social 14% Other Purpose	50% Commuting 28% Recreational/Social 22% Other Purpose	33% Commuting 45% Recreational/Social 22% Other Purpose	18% Commuting 59% Recreational/Social 24% Other Purpose
Average % Per Boarding Method	36% Walk-on 54% Drive-on 9% Passenger	32% Walk-on 51% Drive-on 17% Passenger	28% Walk-on 43% Drive-on 29% Passenger	22% Walk-on 31% Drive-on 49% Passenger
Primary Boarding Methods	44% Vehicle driver 23% Passenger 25% Walk on	46% Vehicle driver 28% Passenger 21% Walk on	22% Vehicle driver 51% Passenger 24% Walk on	12% Vehicle driver 62% Passenger 22% Walk on
Primary Ticket Type	43% Multi ride ticket 21% Single ride ticket	39% Multi ride ticket 35% Single ride ticket	37% Multi ride ticket 45% Single ride ticket	37% Multi ride ticket 46% Single ride ticket
Ferry Travel Compared to a Year Ago	11% Riding More 72% Riding Same 16% Riding Less	9% Riding More 72% Riding Same 14% Riding Less	13% Riding More 68% Riding Same 16% Riding Less	12% Riding More 71% Riding Same 11% Riding Less

Table 17: Household Ferry Ridership Characteristics

Weighting Schemes

Specific weights were applied to the data gathered in order to more accurately match with general population statistics, and therefore have a better understanding of the thoughts and opinions of the public as a whole. Weights were added based on the route and boarding method of respondents' last ferry trip. Any respondent not falling into the groups below were weighted with 1.000000.

Combined Totals	Summer			Winter		
	Vehicle	Passenger	Walk on	Vehicle	Passenger	Walk on
SEA/BAIN	1.062098	2.725732	1.183595	1.542969	2.843451	1.225253
SEA/BRE	0.851549	1.973786	1.155737	1.359257	3.665663	1.154100
PTD/TAH	0.892869	1.753923	1.429088	0.686756	1.672247	0.733515
EDM/KIN	1.046518	2.551931	1.116750	1.307869	4.473100	0.982263
FAU/VAS	0.810835	1.703018	0.638938	0.840150	2.445594	0.772238
FAU/SOU	0.592824	1.035241	0.414366	0.862334	1.386595	0.428060
SOU/VAS	0.988362	0.060926	1.025437	1.349593	0.000000	0.738762
PTT/COU	0.583451	1.626288	0.496131	0.665300	4.293233	0.668522
MUK/CLI	0.657484	1.977706	0.674260	0.659615	2.046416	0.683696
ANA/SJI	0.375565	1.397530	0.983456	0.232341	0.552144	0.426096
ANA/SID	0.824743	2.028013	3.564248	--	--	--
INTER SJI	0.470964	2.896373	0.433401	0.436475	1.333133	0.066679