



market decisions
CORPORATION

Summer Report Findings

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



Washington State
Transportation Commission

Conducted by
Market Decisions Corporation
June-August 2010



Preface

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



Methodology

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

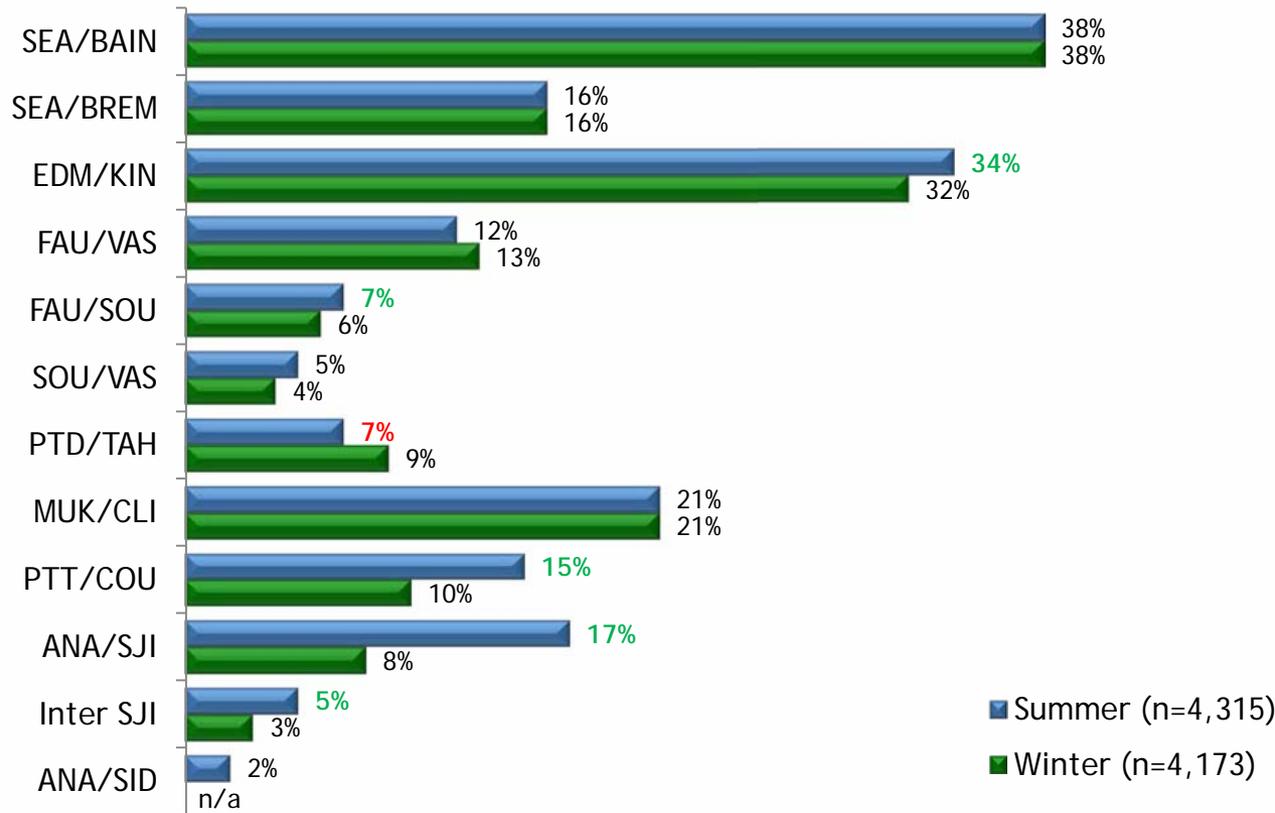


General Ridership



Overall Ridership

Route Ridership



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

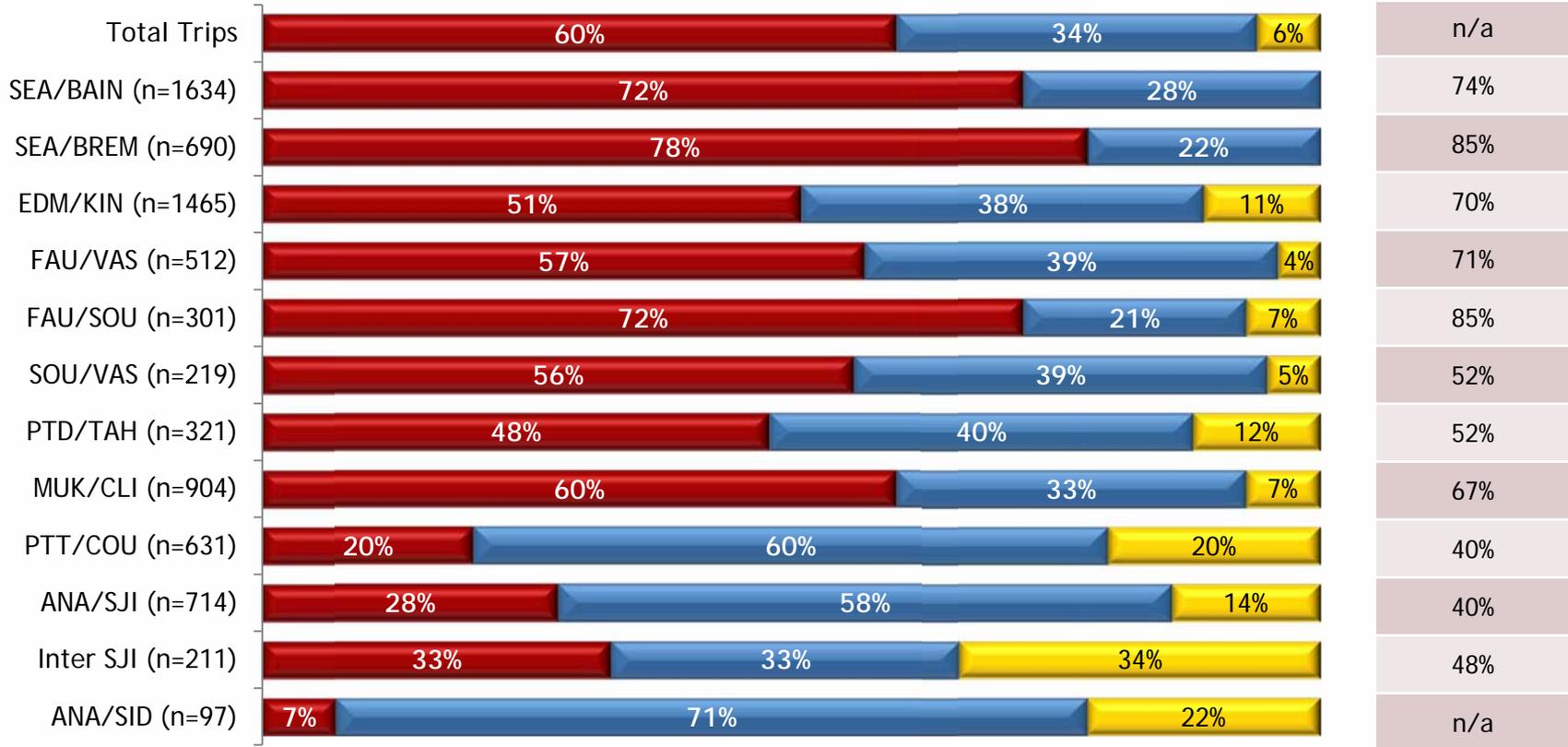
S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the summer schedule period, June 20-September 25, 2010. For the routes shown below, how many round trips (two one-way trips = one round trip) per month do you take, on average, during the summer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



Summer Period Ridership - Trip Purposes

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

■ Primarily for commuting ■ Primarily for recreational ■ Other



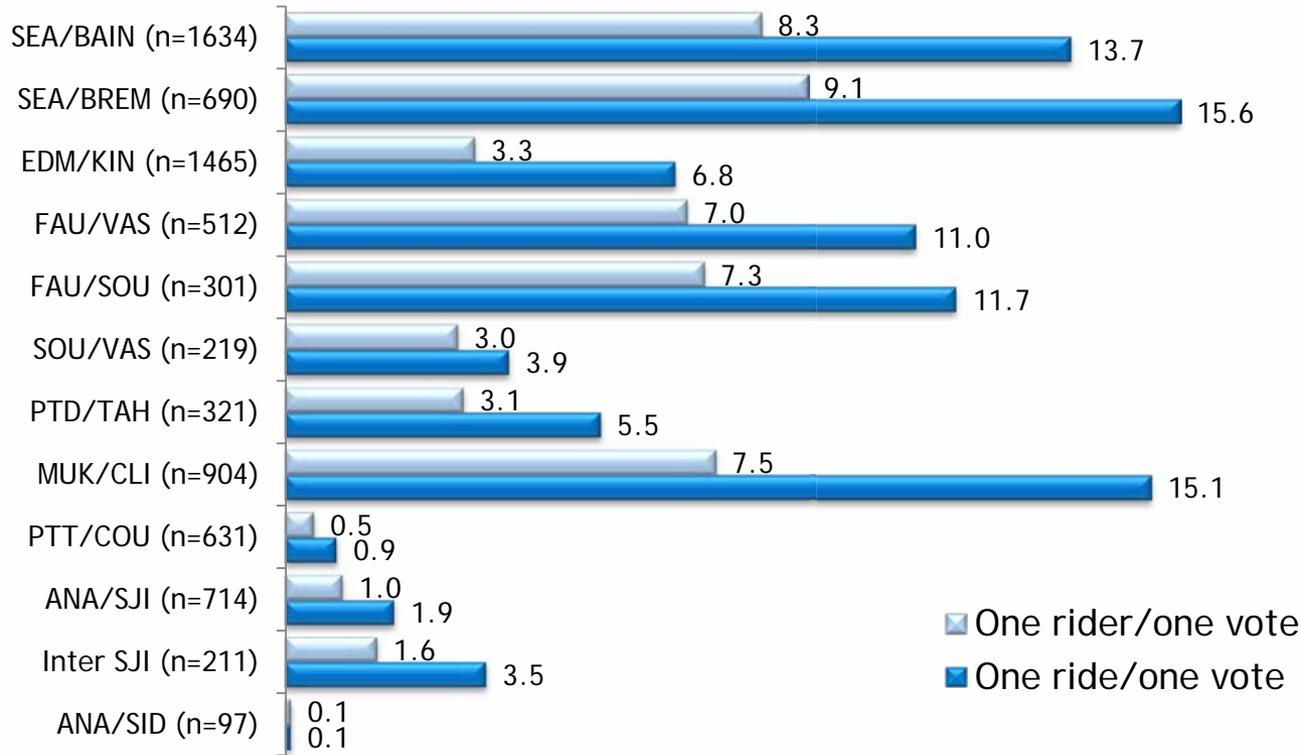
S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?



Summer Period Ridership - Commuting Trips

Commuting Trips Per Month (of those who ride route)

Avg. # of
Commuting
Trips per
Rider, Winter
Months



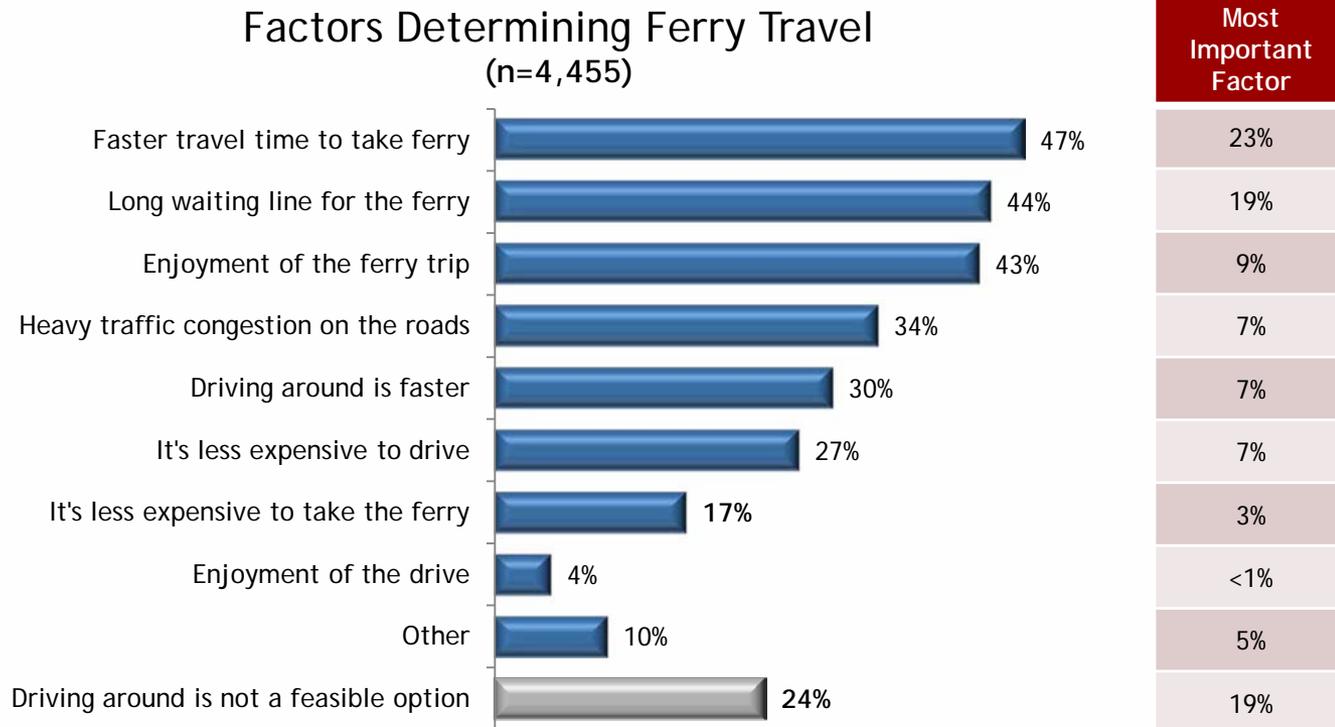
8.3
11.2
5.3
9.6
11.4
2.9
3.4
9.0
1.2
1.7
2.0
n/a

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



Factors Driving Ferry Travel

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



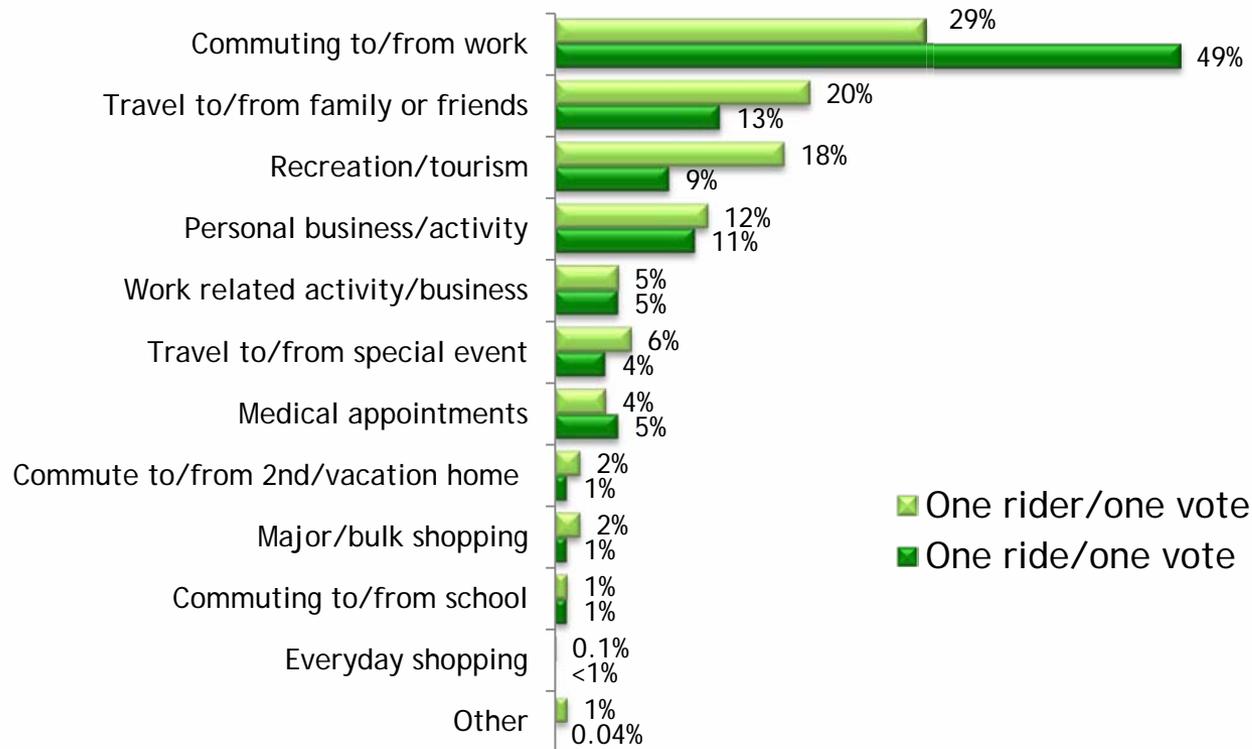
Q21 For your non-commuting trips, when considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?

Q22 Which is the most important factor?



Purposes of Ferry Rides

Primary Purposes of Ferry Rides (n=4,239)



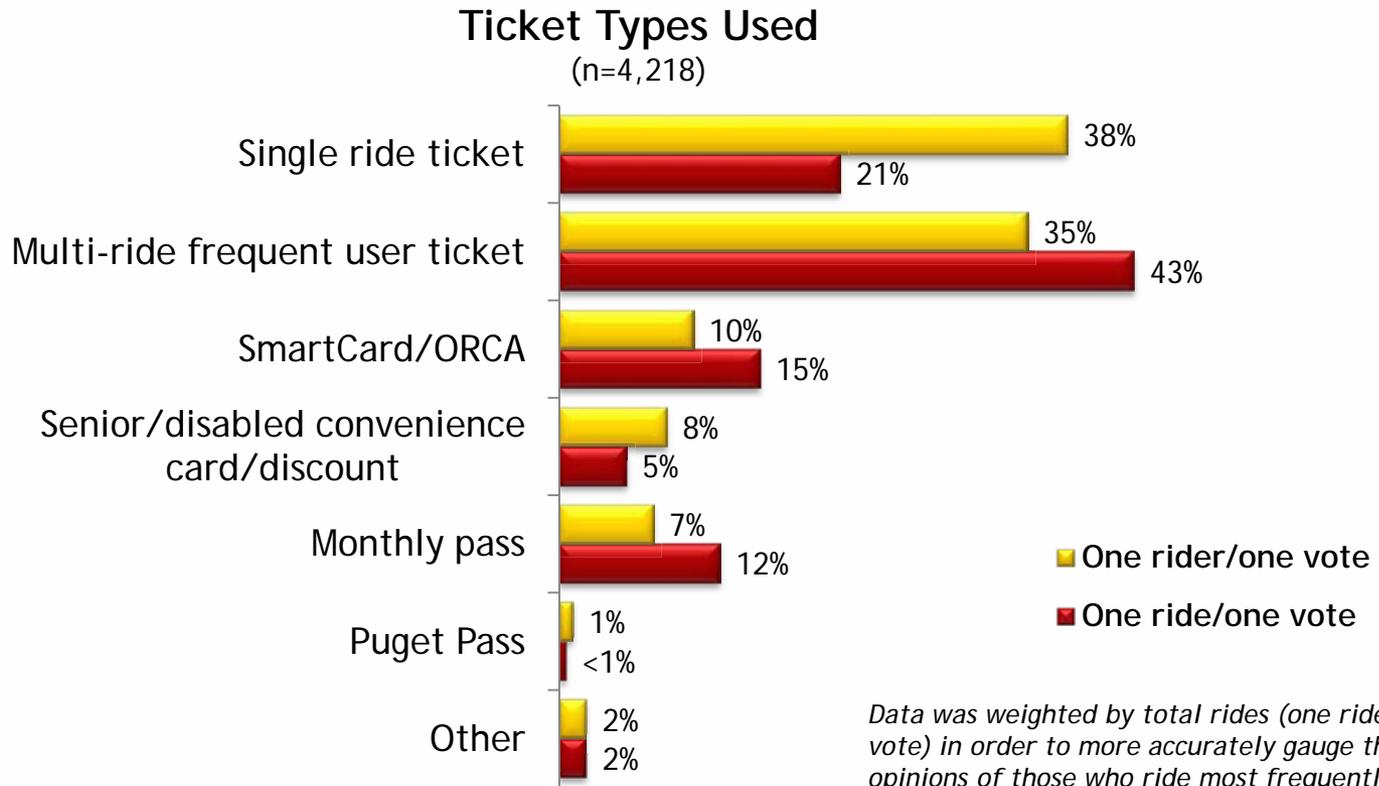
Winter 2010 (n=4,168)
39%
14%
6%
15%
8%
4%
7%
2%
1%
1%
1%
<1%

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



Ticket Types Used

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



Data was weighted by total rides (one ride/one vote) in order to more accurately gauge the opinions of those who ride most frequently.

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

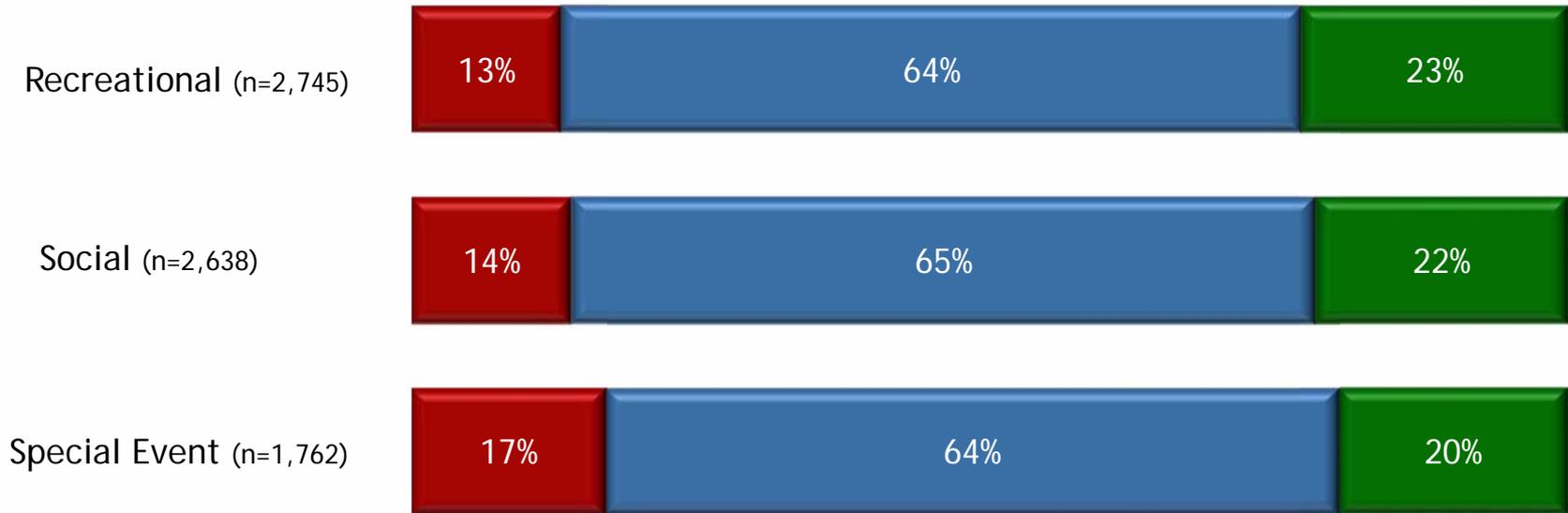


Recreational and Social Travel



Change in Summer Ridership

■ Decreased ■ Stayed the same ■ Increased

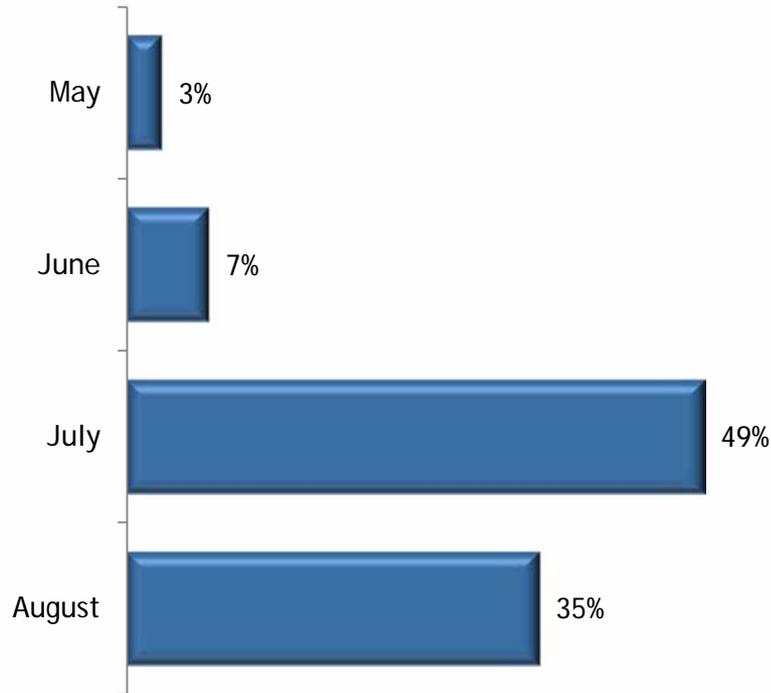


- N1 Compared to 2009, has the number of your special event (i.e. ball games/concerts/etc.) trips where you used the ferries increased, stayed the same, or decreased?
- N2 Compared to 2009, has the number of your social (i.e. see friends/family/etc.) trips where you used the ferries increased, stayed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



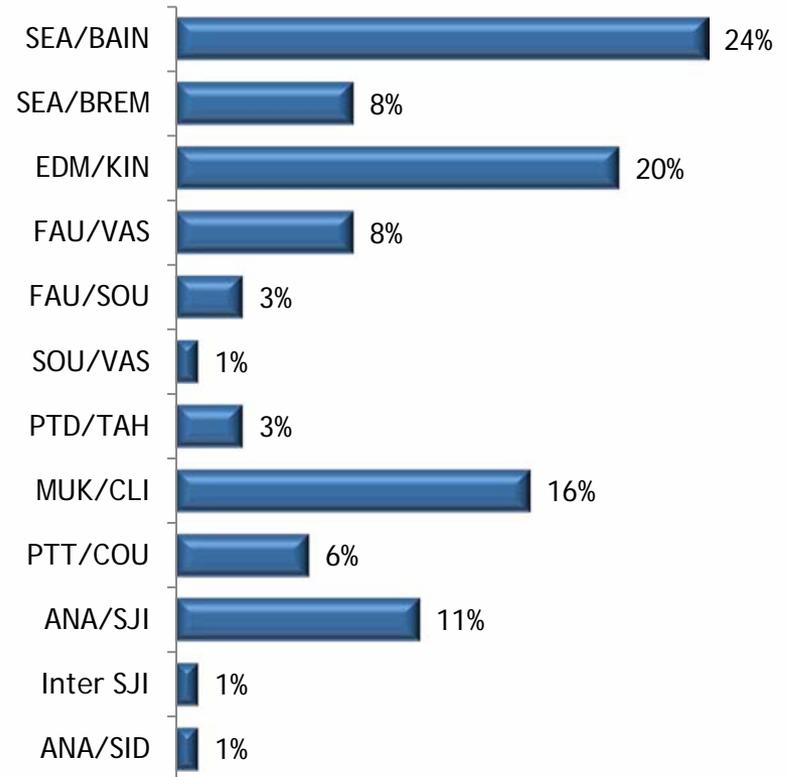
Most Recent Recreational and Social Trip

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



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

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



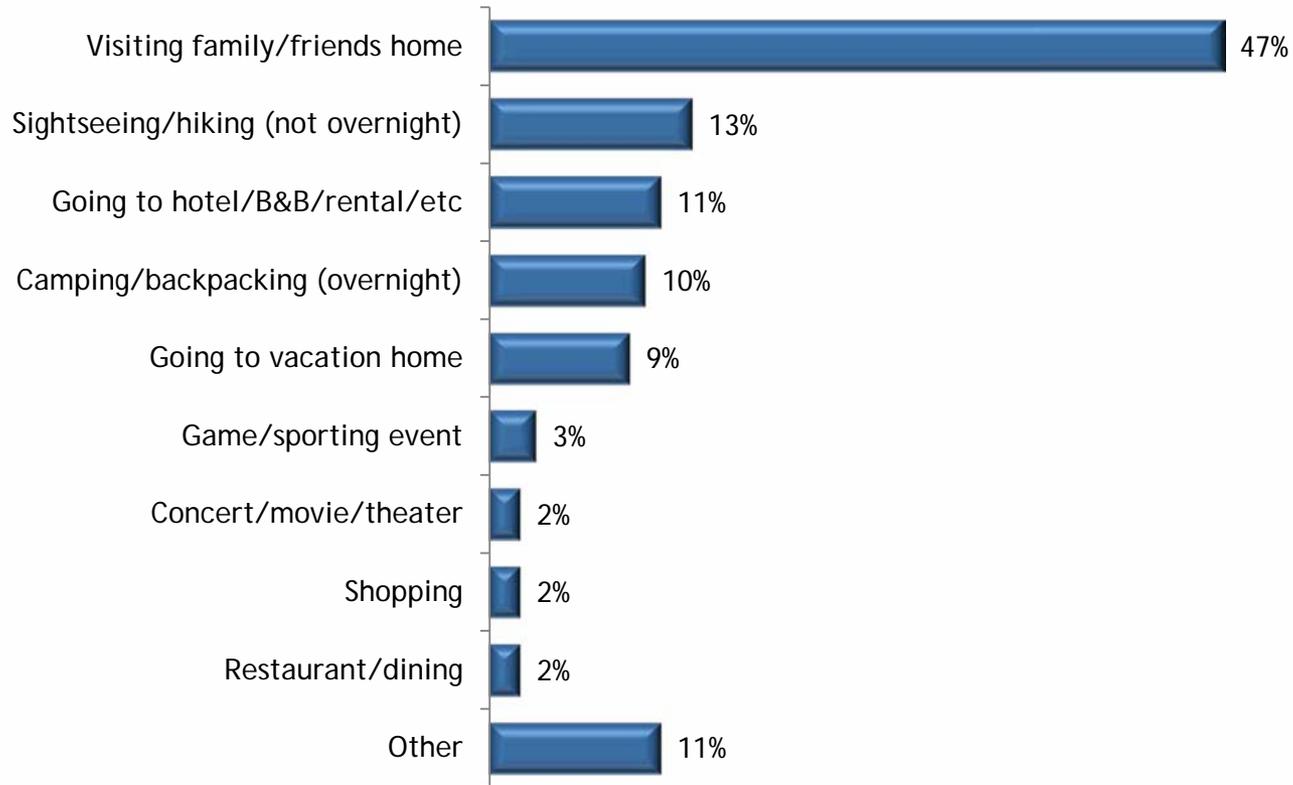
N5 In which month did you take your most recent recreational or social trip that used the Washington State Ferries?

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



Purpose of Most Recent Trip

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



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

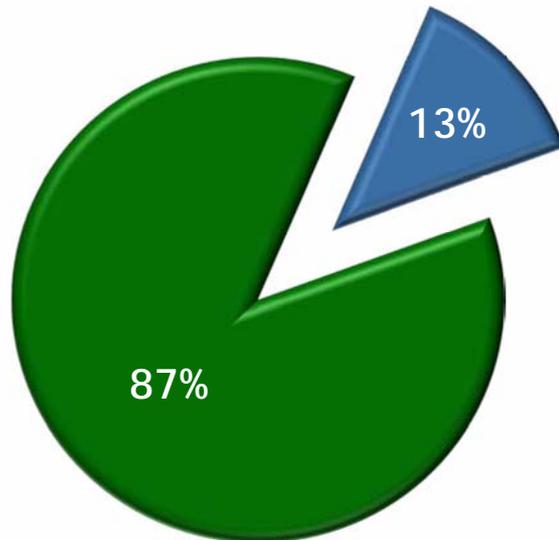


Destination and Relative Cost

Destination of Last Recreational/Social Trip

(n=3,864)

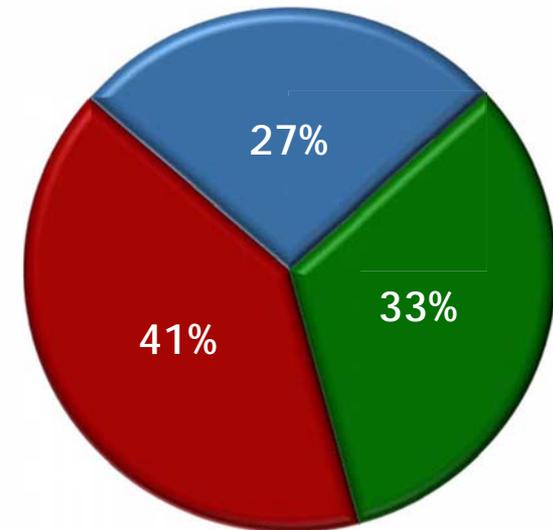
■ Washington State only ■ Multi-State/Multi-nation



Relative Cost of Last Recreational/Social Trip

(n=3,855)

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



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

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

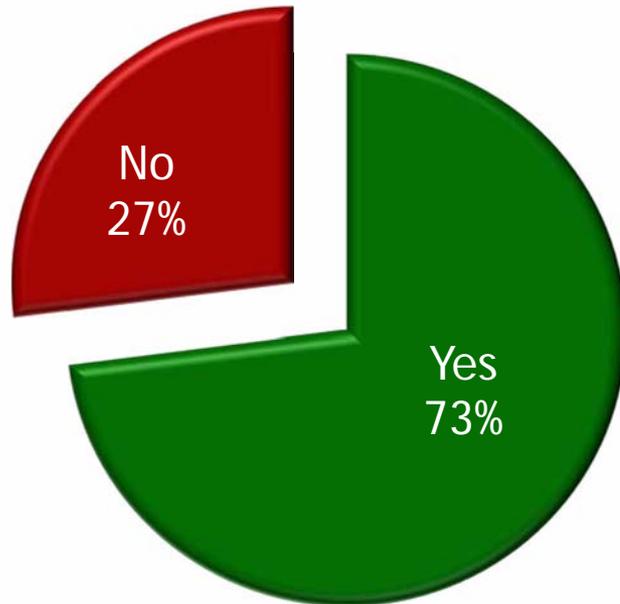


Tariff & Surcharge

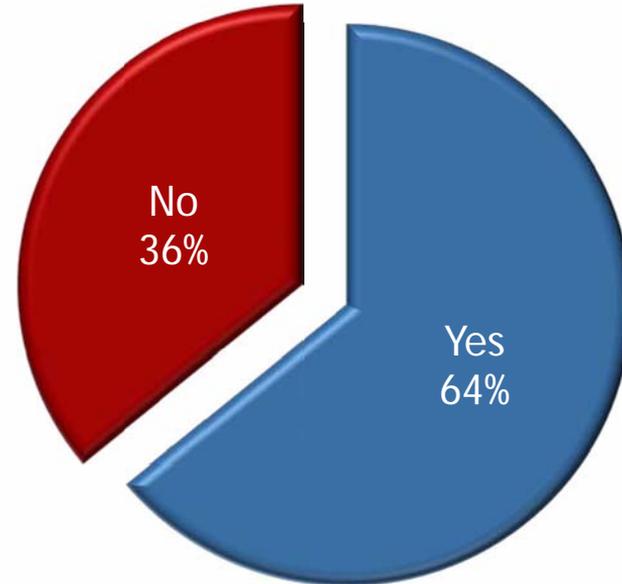


Support for Higher Single-Fare Pricing

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



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



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



Support for Higher Priced Single-Fare Ticket By Legislative District

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

Legislative Districts

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

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

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



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

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

Legislative Districts

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

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

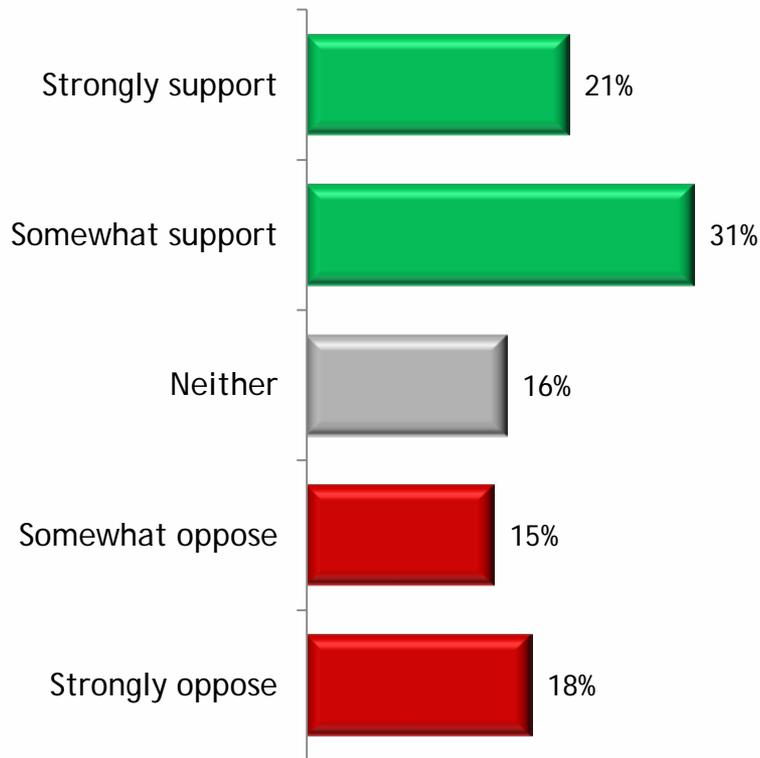
N19 As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the Summer season than during the winter season?



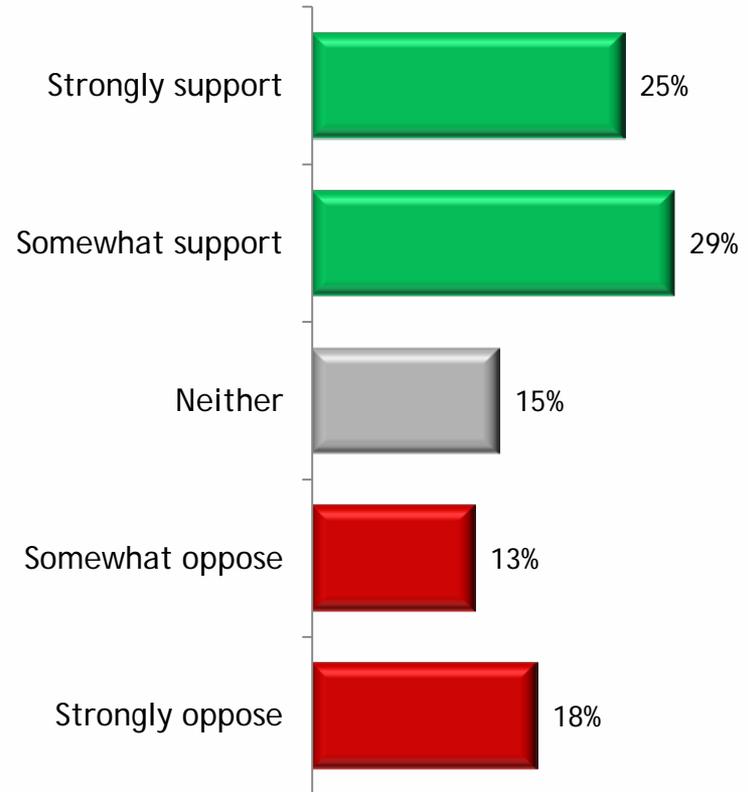
July/August Single-Fare Increase

Support Higher Single-Fare Price July-August - By Rider

(n=1,974)



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

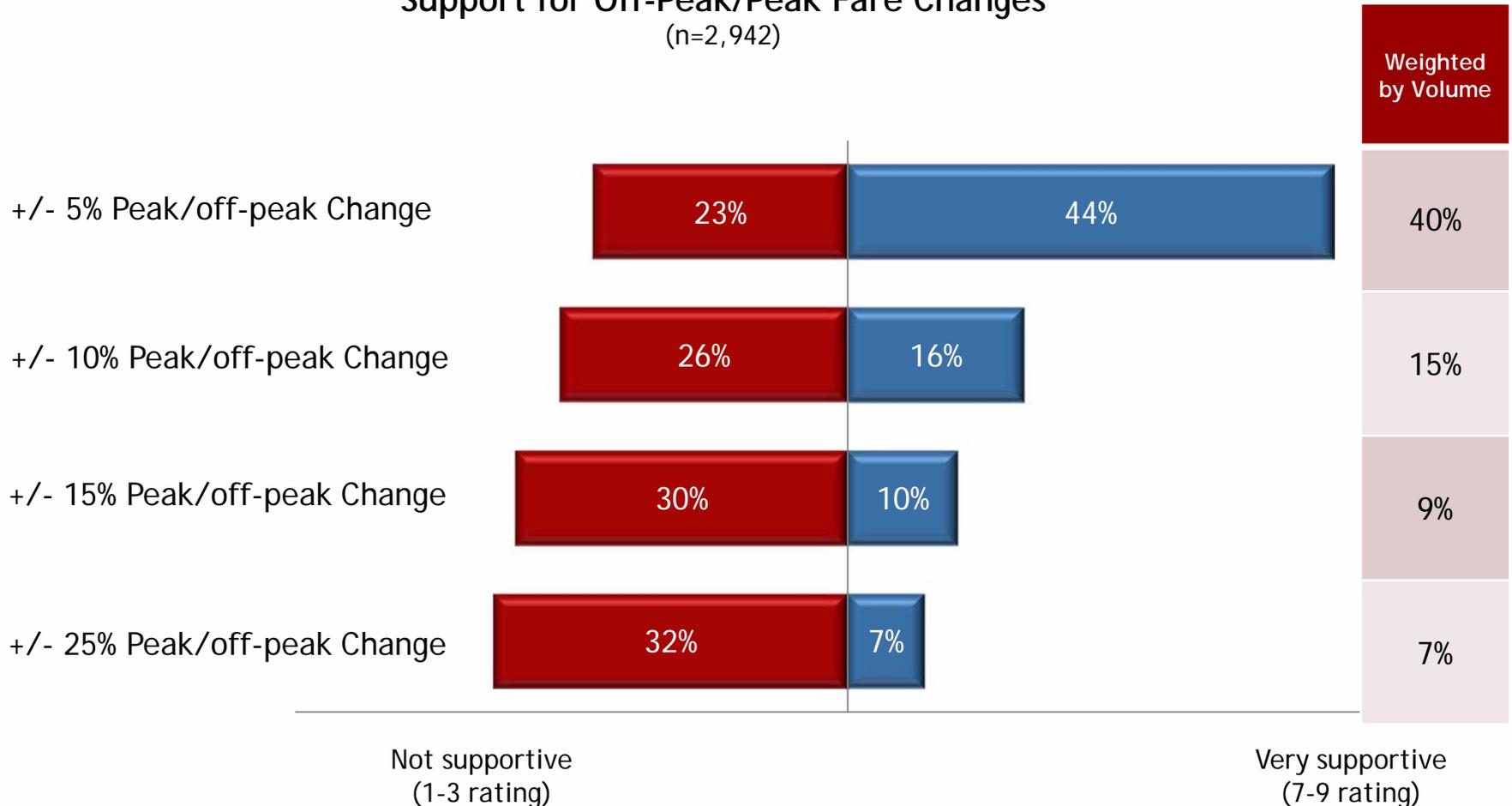


N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current Summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?



Support for Seasonal Congestion Pricing Changes

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



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



Support for Seasonal Congestion Pricing By Legislative District

Legislative Districts

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

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

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

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



Impact of Peak Time Price Increases

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

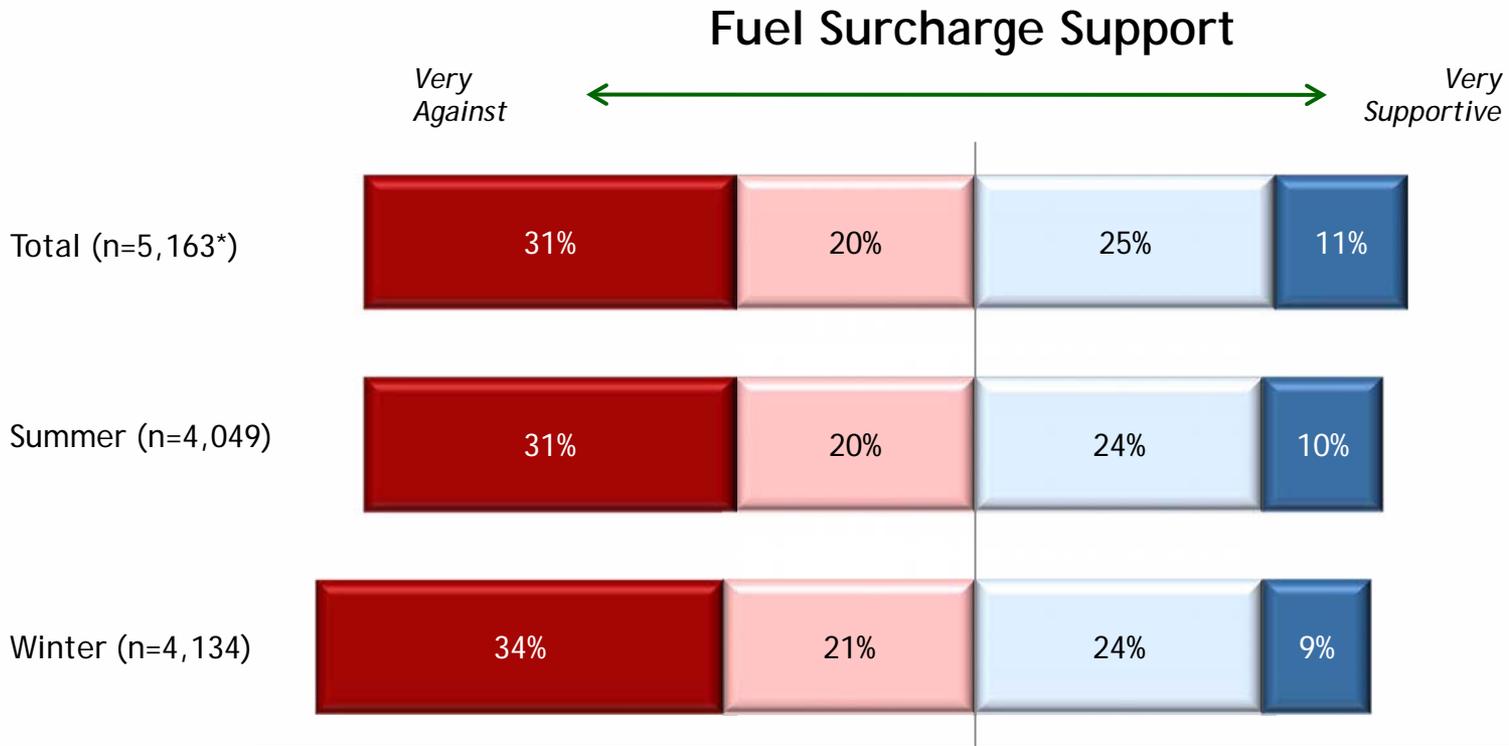
Support Off-Peak/Peak Fare Changes*	5% Change (n=2,713)	10% Change (n=2,713)	15% Change (n=2,713)	25% Change (n=2,713)
I wouldn't change anything	52%	46%	39%	32%
Fewer vehicle trips during peak times; more during off-peak times	27%	35%	42%	48%
About the same trips during peak times; walk on more often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

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

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



Fuel Surcharge Support



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

**Differs due to weighting*

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



Support for Fuel Surcharge By Legislative District

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

Legislative Districts

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

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

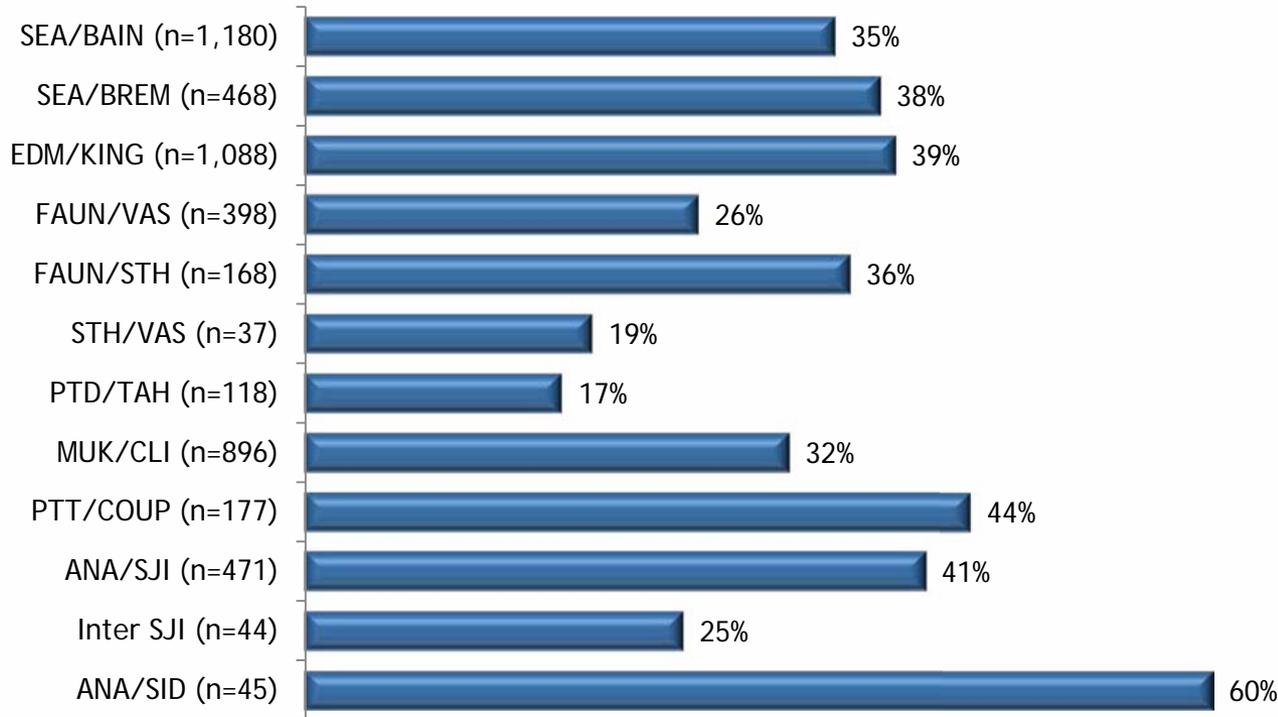
*Based on a 5-point scale: 1=very supportive, 5=very against.

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



Fuel Surcharge Support - By Route

Fuel Surcharge Support (Top Box Ratings 4-5)



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

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



Fuel Surcharge Maximum By Legislative District

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

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

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

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



Fuel Surcharge Application By Legislative District

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

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

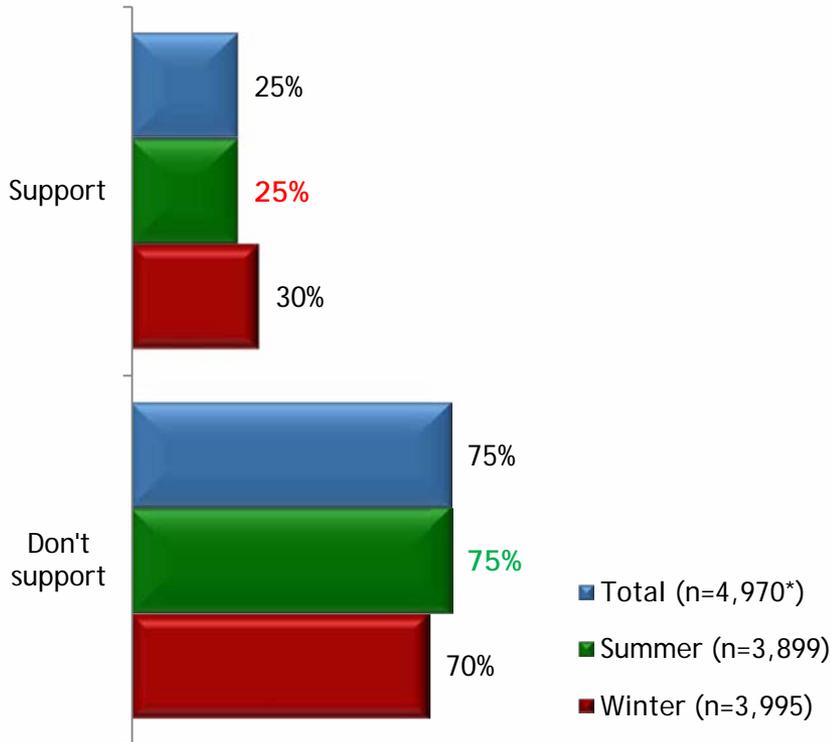
Fuel Surcharge Application - Summer	37 n=117	38 n=49	39 n=63	40 n=286	41 n=89	43 n=35	43 n=320	44 n=76	45 n=99	46 n=202	48 n=209	Other n=279
Equally to vehicle & passenger fares	44%	59%	59%	38%	52%	55%	41%	54%	58%	48%	52%	46%
Apply to vehicles only	32%	30%	26%	20%	30%	26%	36%	34%	21%	31%	24%	30%
Apply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

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

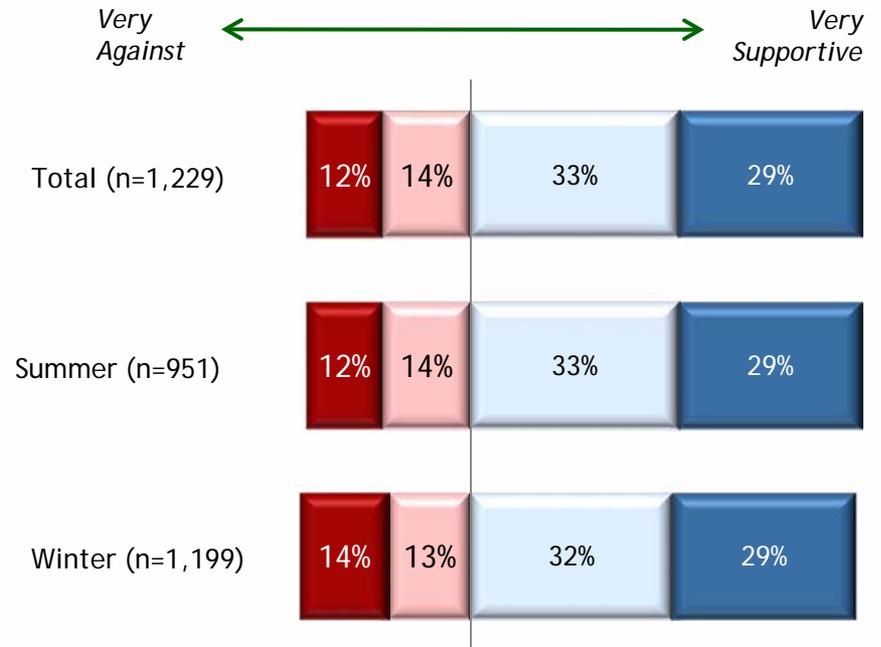


Higher Fares for Non-Residents

Higher Fares for Non-Residents



Support Given Extra Time Needed



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

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

*Differs due to weighting

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

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



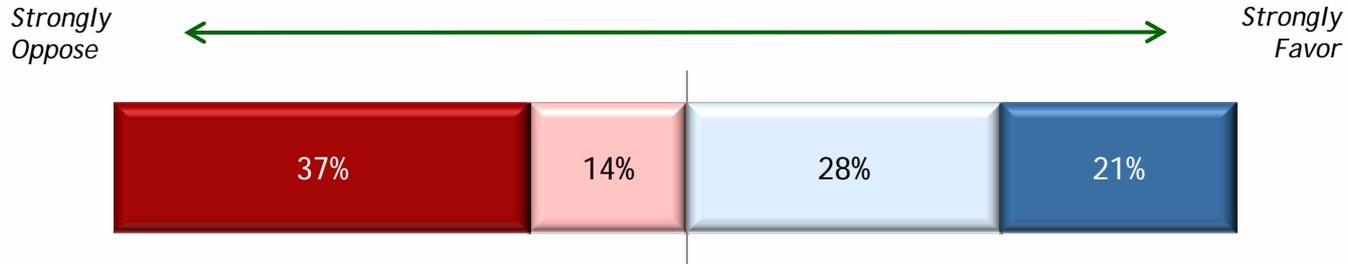
Reservation System



Reservation Program - Support & Use

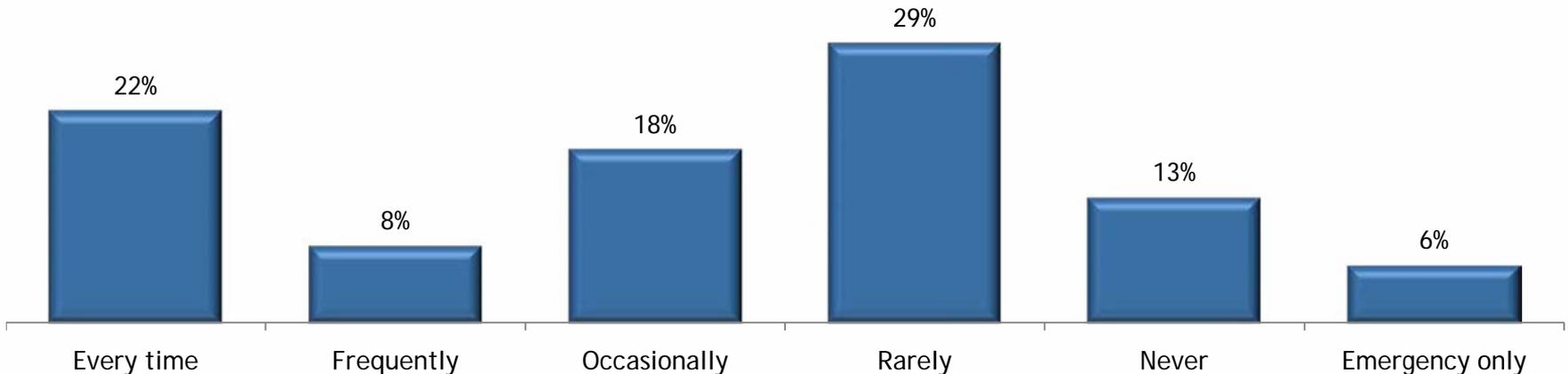
Reservation Program Support

(n=3,981)



Expected Use of Reservation System

(n=4,078)



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

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



Reservation Program Support - By Route

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

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

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



Reservation Program Use - By Route

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

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

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



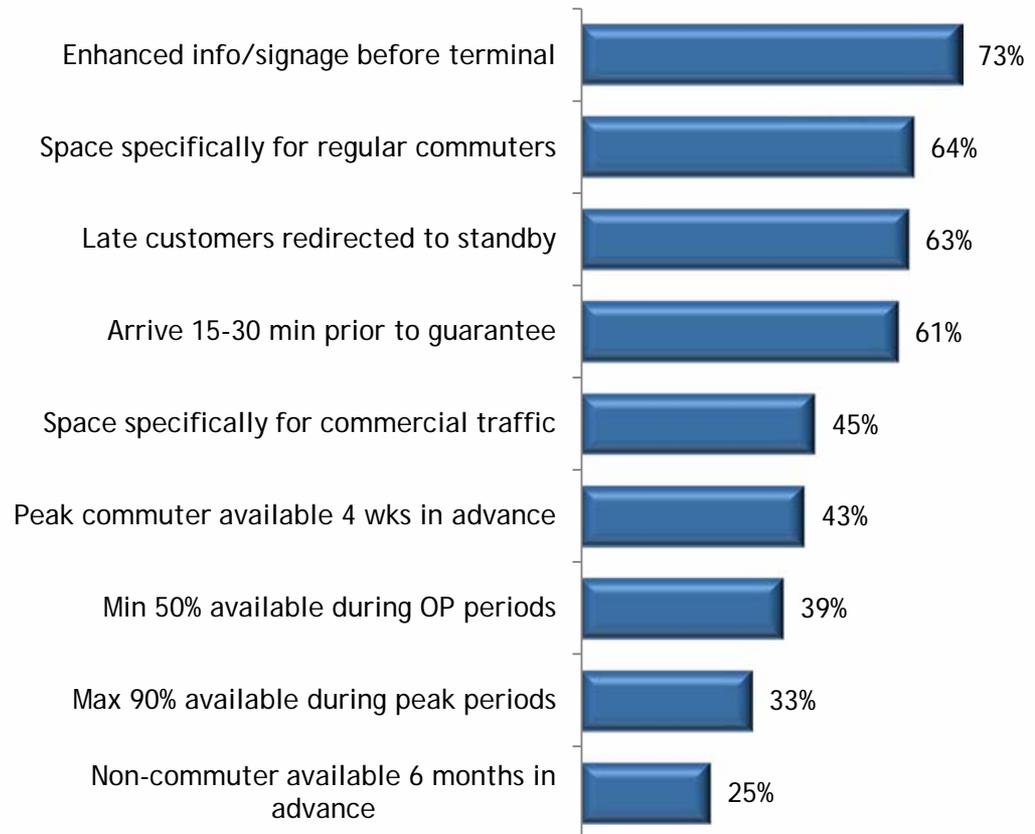
Reservation Feature Importance

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

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

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

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



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



Reservation Feature Importance - By Route

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

* Caution: Small sample sizes

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

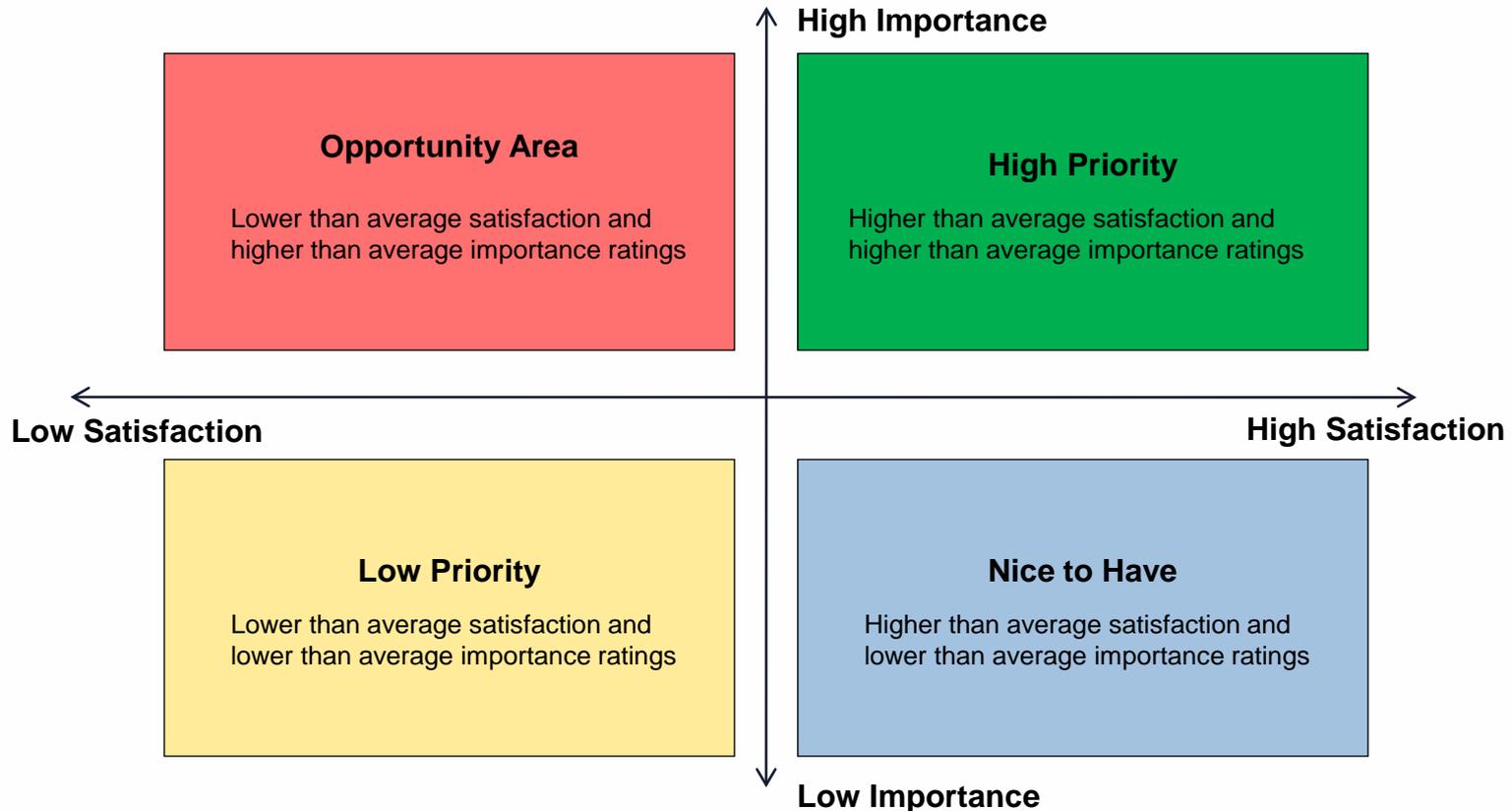


Ferry Services & Amenities



Gap Analysis - Ferry Service

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



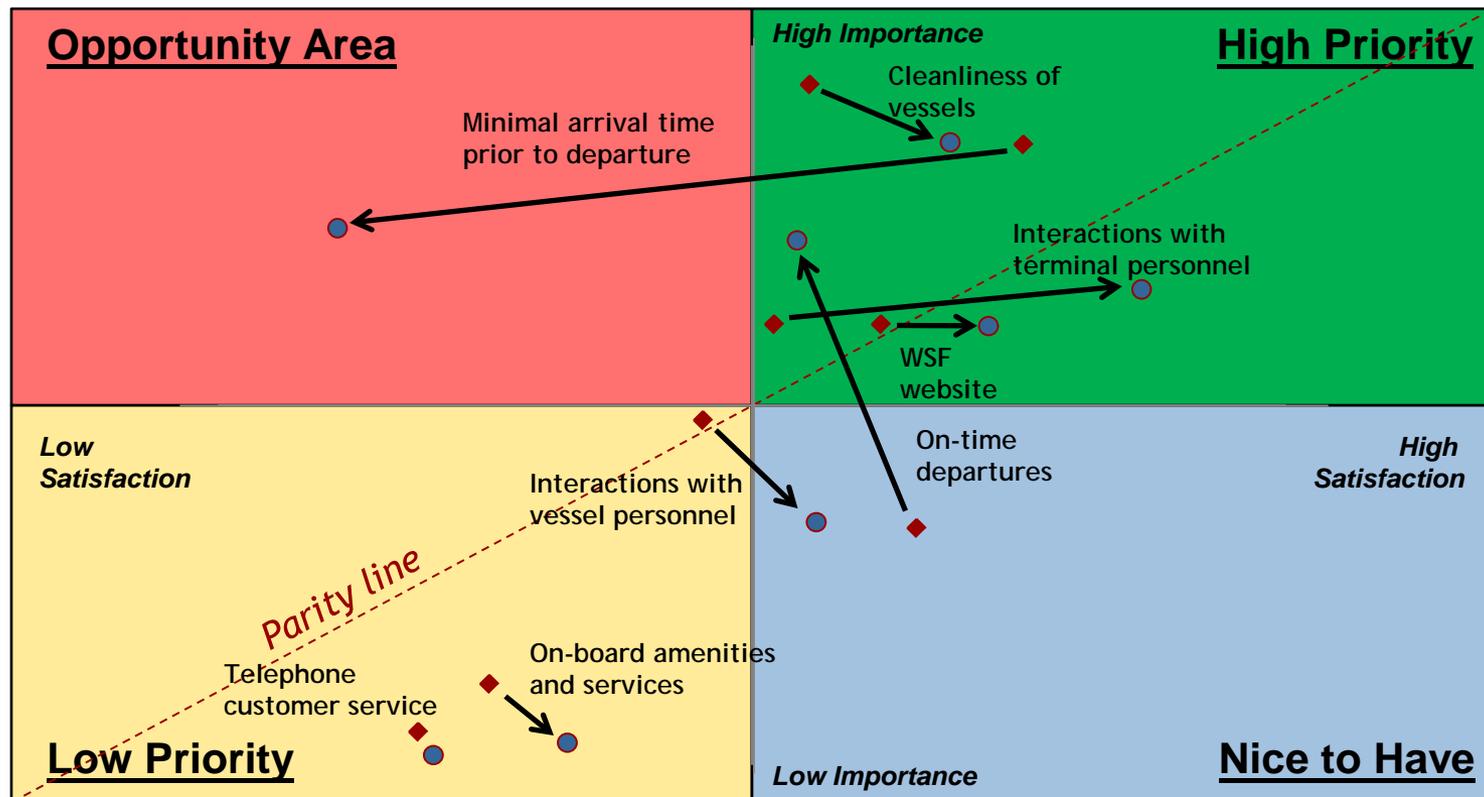


Gap Analysis

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

Satisfaction vs. Importance Ratings

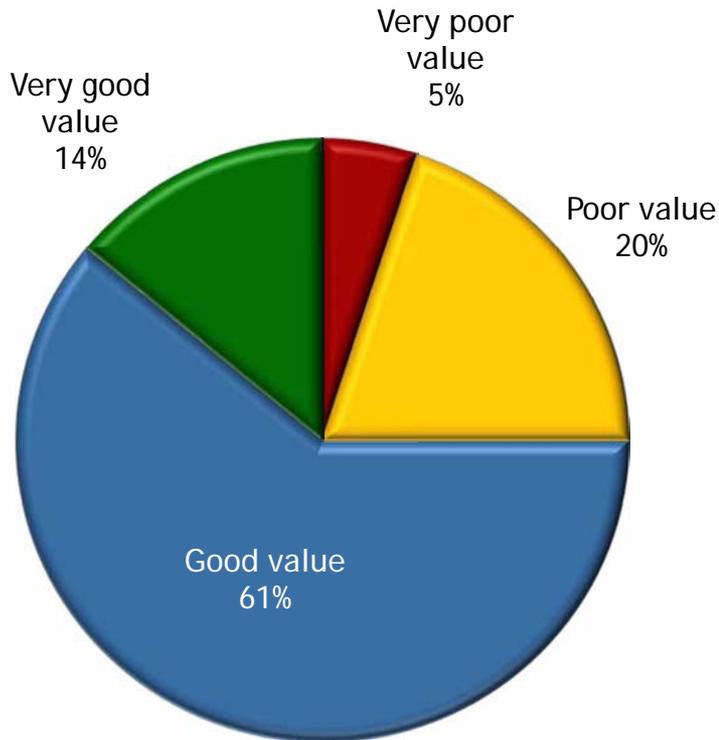
● = Summer ◆ = Winter



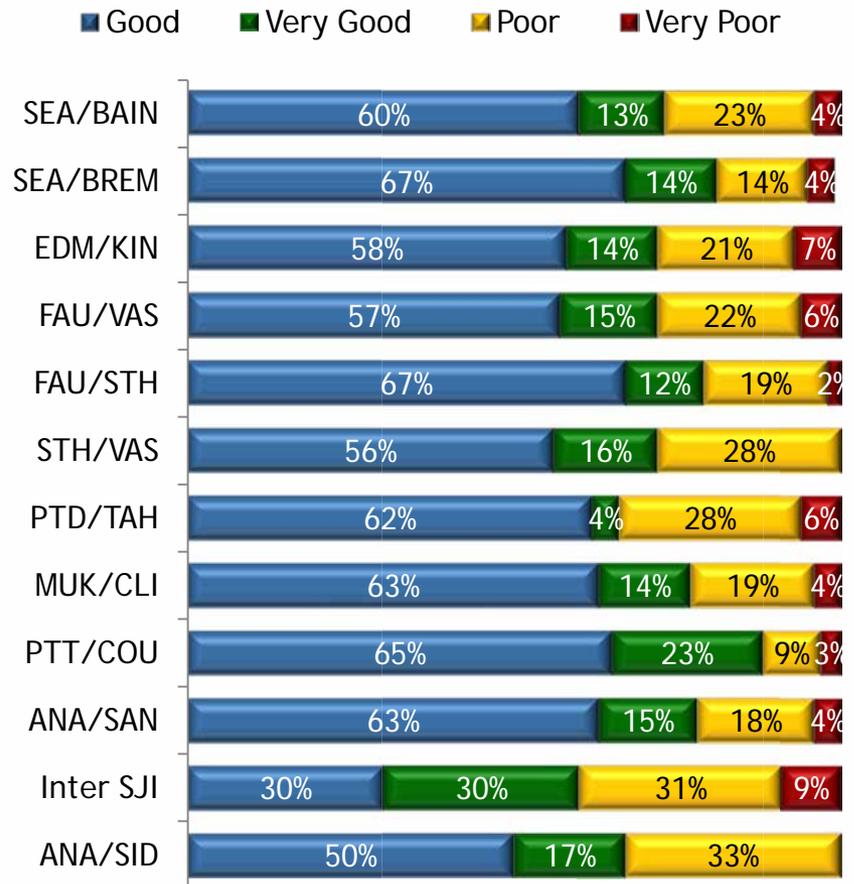


Perceived Summer Value - By Rider

Perceived Summer Value (n=3,898)



Perceived Value - By Route



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