



2010/11 WSF Summary Findings Report

*Washington State Transportation Commission 2010/11
Ferry Research Initiative*



Washington State
Transportation Commission

Conducted by
Market Decisions Corporation



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:
 - Winter Customer Survey
 - Mode Shift and Elasticity of Demand Research
 - Freight Survey
 - General Market Assessment Survey
 - Summer Customer Survey
 - Capital Funding
 - Fare Strategies (To Be Collected February 2011)
- ❖ This is a summary report of the 6 completed studies.
 - A comprehensive report of all phases will be available last February 2011.
 - Breakouts of all survey data by Legislative District will also be available.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC ☎ (360) 705-7070.



Methodology

- ❖ **Winter / Summer Surveys:** A total of 8,463 ferry riders completed the Winter (n=4,173 - April 6-May 28, 2010) and Summer (n=4,315 - July 18-Aug 18, 2010) survey yielding a maximum sample variable of +/- 1.1% at the 95% confidence level.
- ❖ **Freight Study:** A total of 101 telephone interviews were conducted with a random sample of WSF freight customers truck schedulers between April 27 and May 4, 2010 yielding a maximum sample variable of +/- 9.8% at the 95% confidence level.
- ❖ **General Public Study:** A total of 1,200 Respondents (max sampling variability of +/-2.8%) were interviewed by telephone between May 12-15, 2010 who live in one of the target counties/areas (King, Vashon Island, Snohomish, Pierce, Clallam, Island, Jefferson, Kitsap, San Juan, or Skagit).
- ❖ **Capital Funding Study:** Only those ferry riders who are members of FROG (Ferry Riders' Opinion Group) were interviewed between November 9 to 28, 2010. A total of 1,951 completed surveys were received, resulting in a maximum sampling variability of +/-2.22% at the 95% confidence level.
- ❖ **Mode Shift Study:** Only those ferry riders who are members of FROG (Ferry Riders' Opinion Group) and who in the last 3 months drove on during peak hours were interviewed. A total of 1,317 completed surveys were received between October 11-20, 2010, resulting in a maximum sampling variability of +/-2.70% at the 95% confidence level.



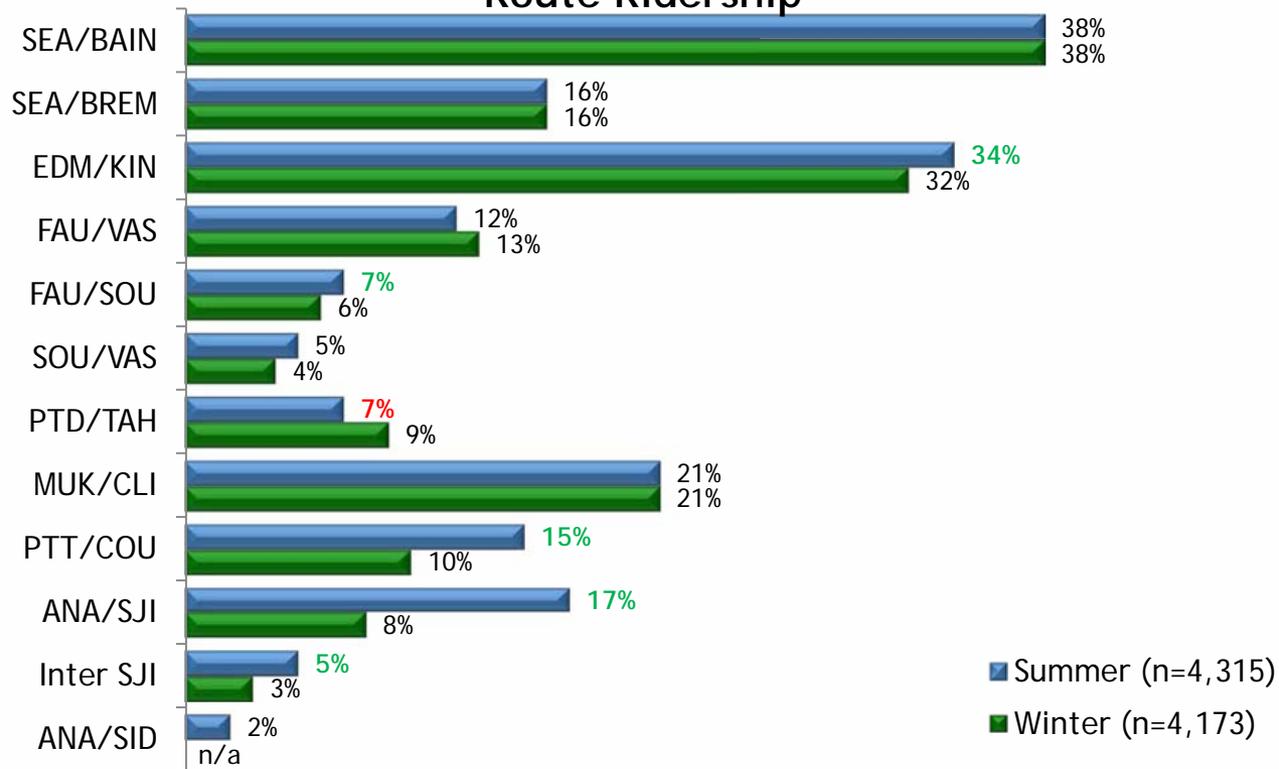
General Ridership



Overall Ridership

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

Route Ridership



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

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

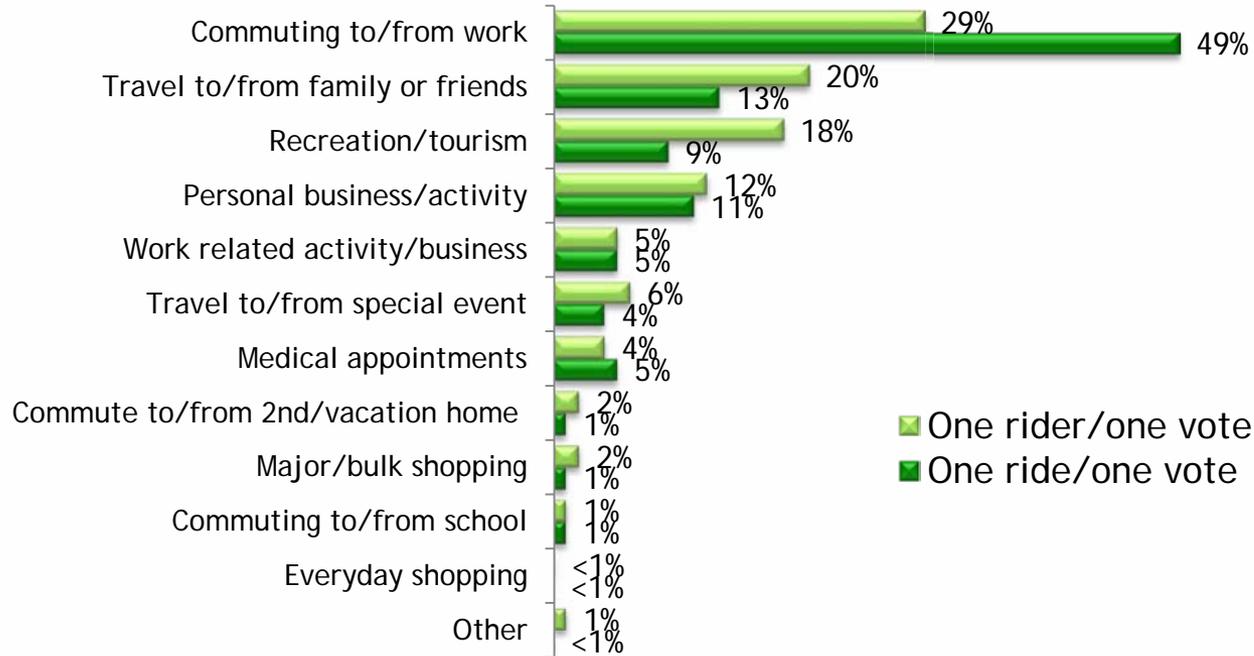


Purposes of Ferry Rides

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

Primary Purposes of Ferry Rides (Summer)

(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?

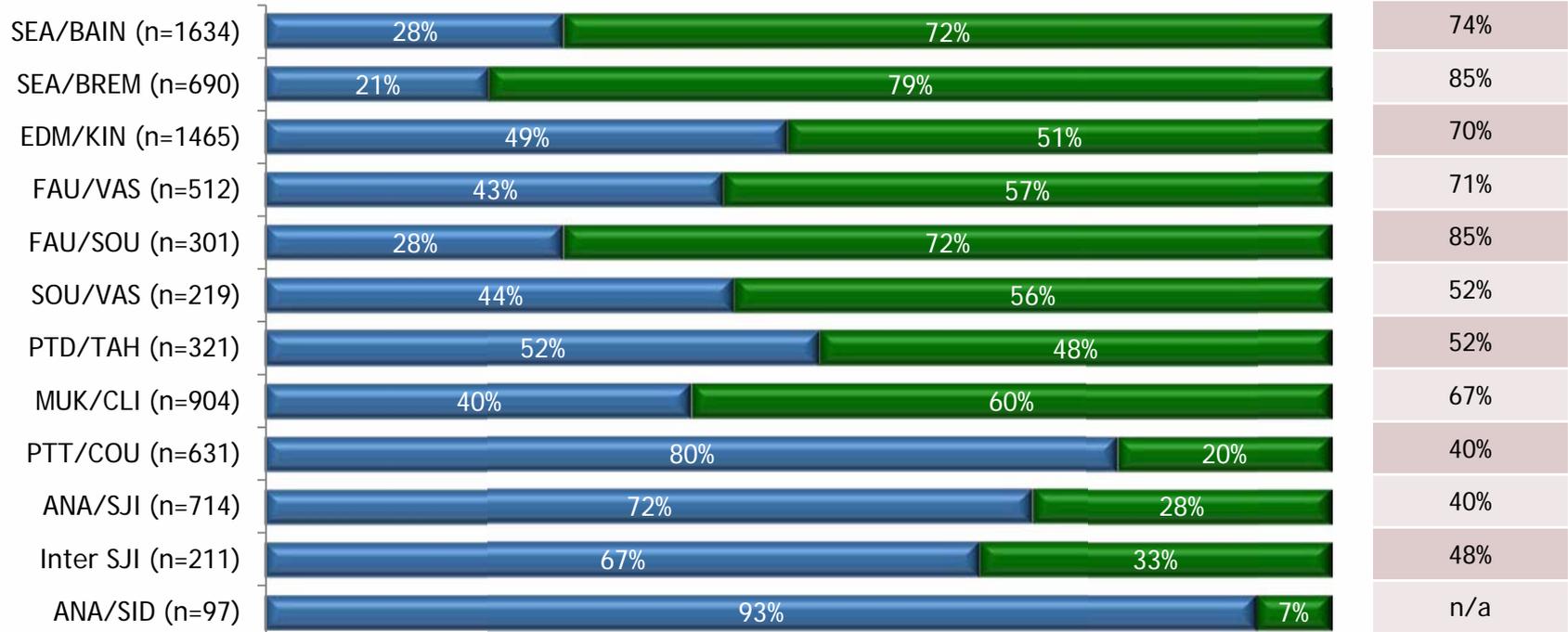


Summer Period Ridership - Commuters

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

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

■ Purposes other than commuting ■ Primarily for commuting

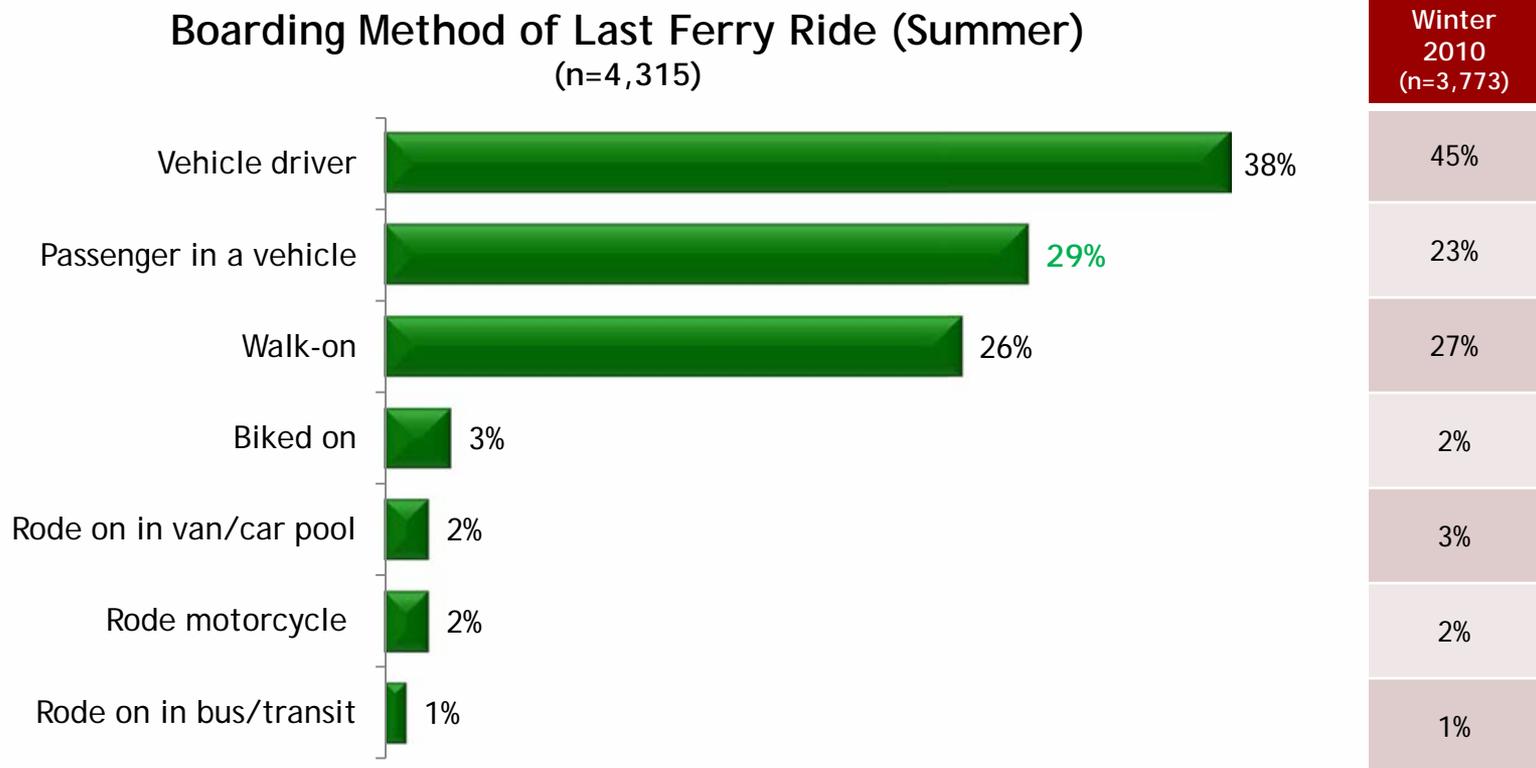


S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?



Boarding Method of Last Ferry Ride

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



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

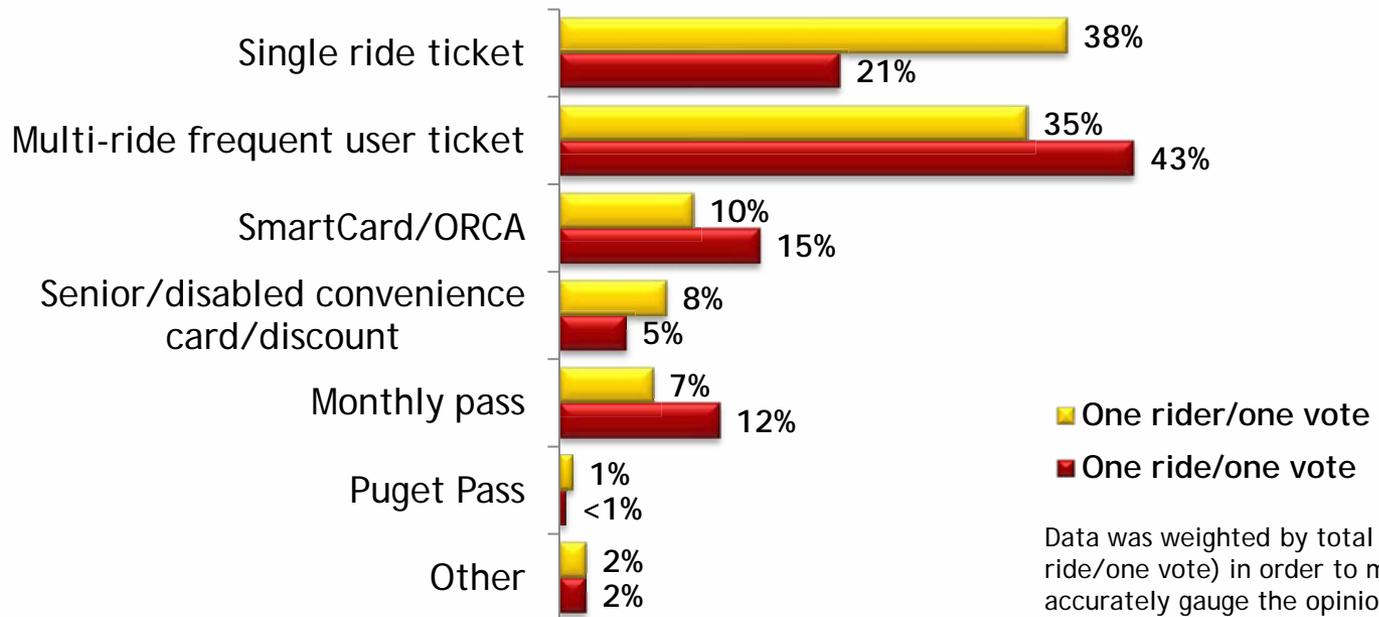


Ticket Types Used

- ❖ 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.

Ticket Types Used (Summer)

(n=4,218)



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



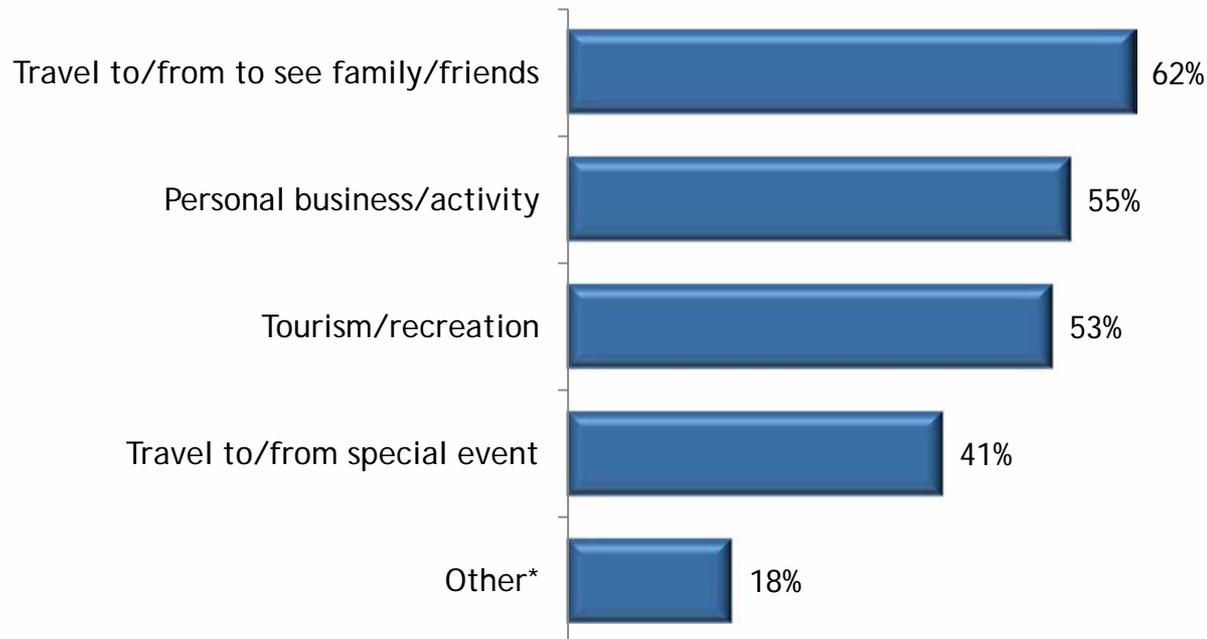
Recreational and Social Travel



Summer Period Ridership - Purpose

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

Purpose of Summer Ridership
(of those who ride route)
(n=4,278)



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

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

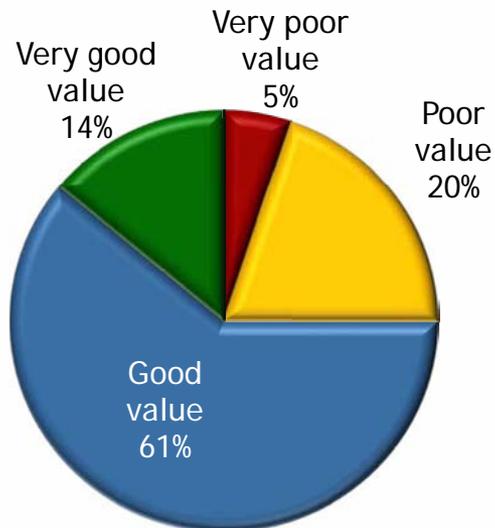


Perceived Summer Value - By Rider

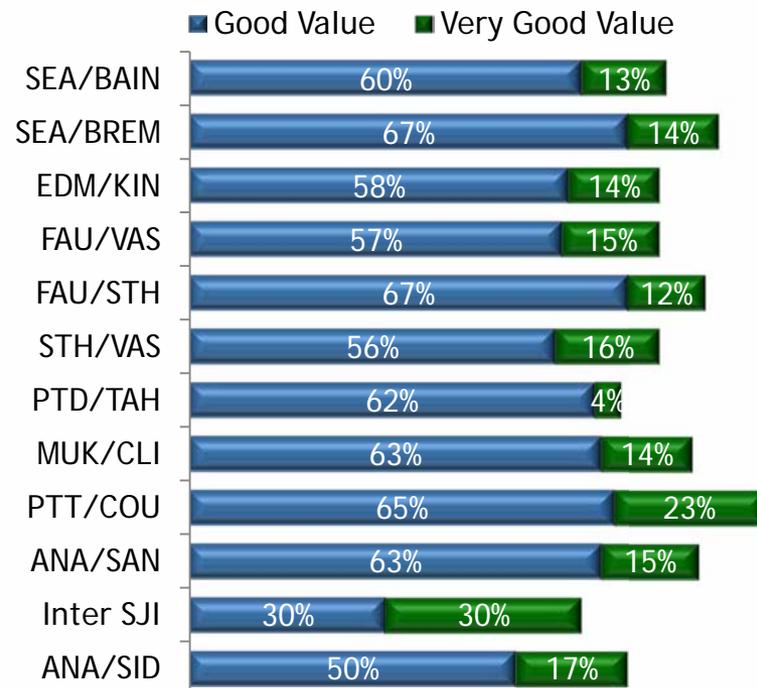
- ❖ 75% of riders feel that WSF is a **good value** during the Summer season; however, only 14% rate it as a "very good value."
 - Those on the Port Townsend/Coupeville route tend to be significantly more likely to positively rate the value of WSF than riders of other routes.
 - Frequent riders give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

Perceived Summer Value

(n=3,898)



Perceived Value - By Route



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



General Public Within Puget Sound Basin

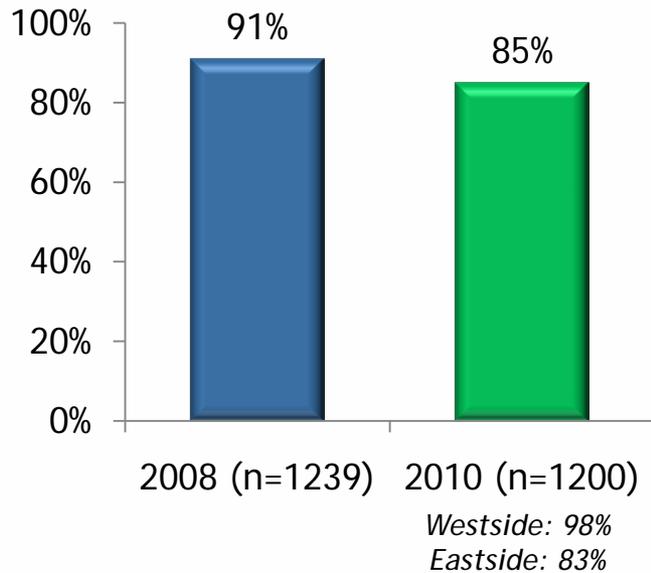


Ferry Ridership (within General Public)

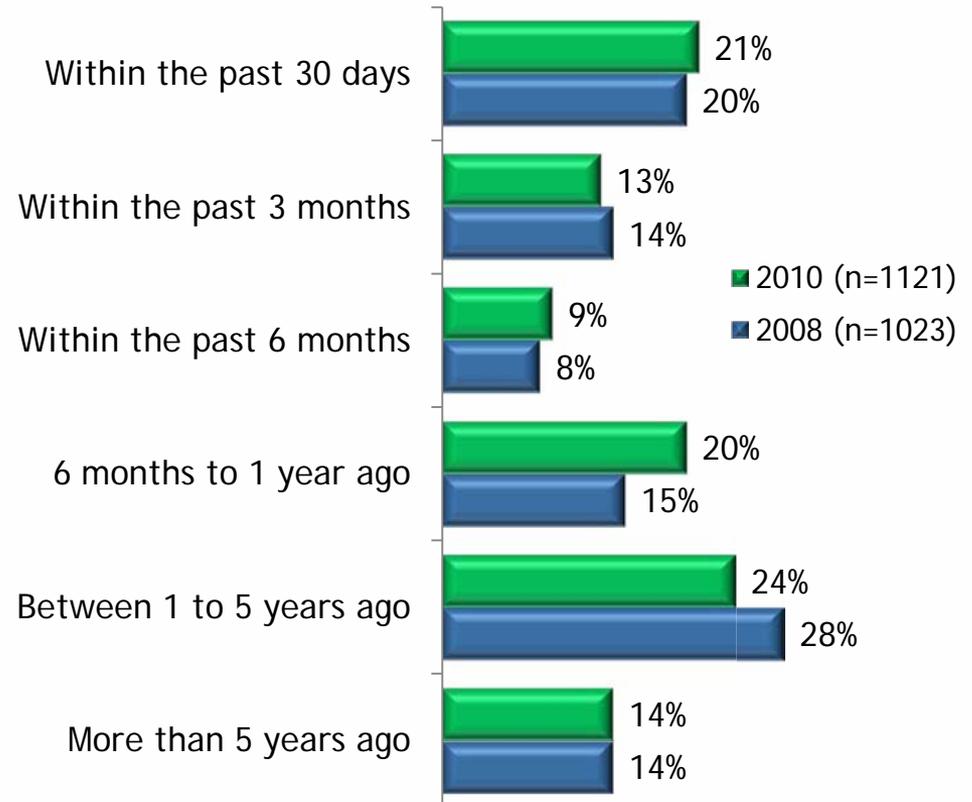
❖ A significantly lower percent of Puget Sound residents say they have ever ridden WSF in 2010 compared to 2008 (91% vs. 85%, respectively).

- However, the last trip took place at approximately the same time as in 2008.

Ferry Ridership



Last trip on WSF



F1 Have you ever ridden a Washington State Ferry?

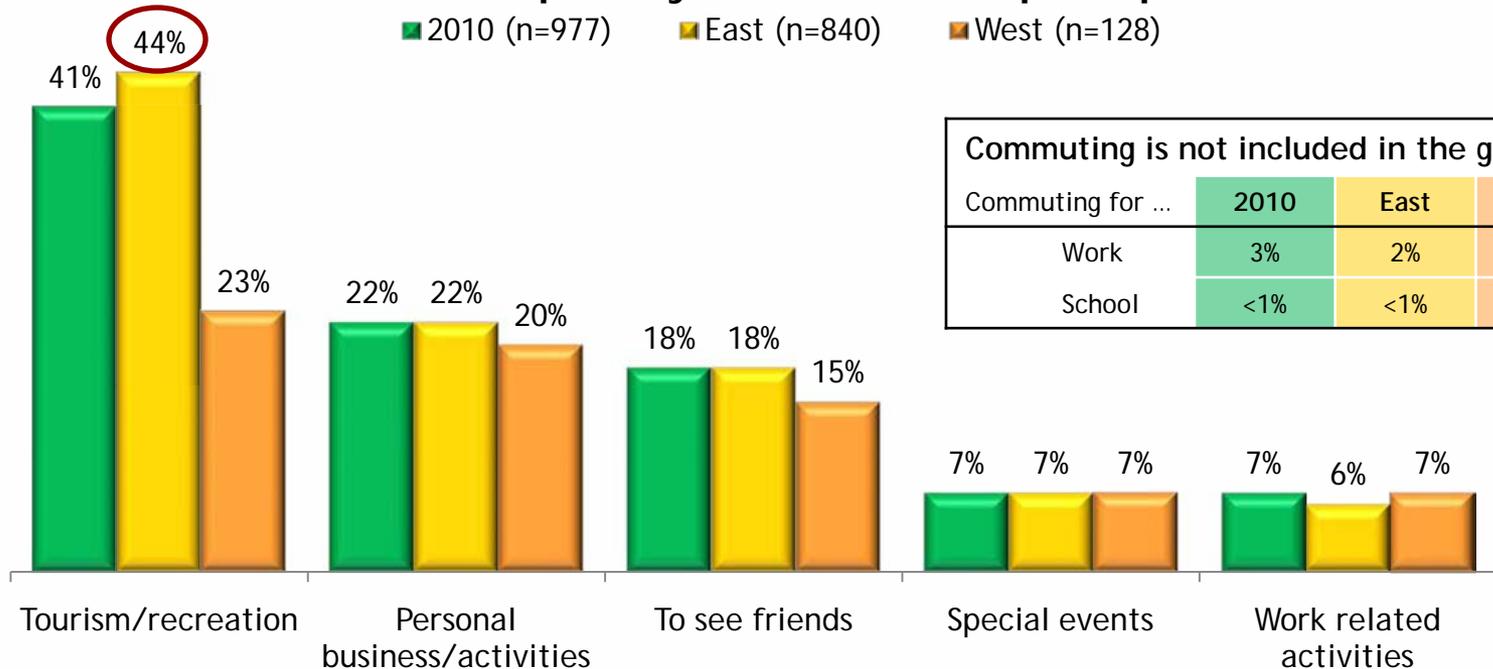
F2 When was the last time you rode a Washington State Ferry? Was it...



Trip Purposes (Among General Public Riders)

- ❖ Trip purposes are similar between Eastside and Westside residents.
 - However, Eastside residents are significantly more likely to travel for recreation than Westside residents.

Most Frequently Mentioned Trip Purpose



Commuting is not included in the graph.

Commuting for ...	2010	East	West
Work	3%	2%	9%
School	<1%	<1%	2%

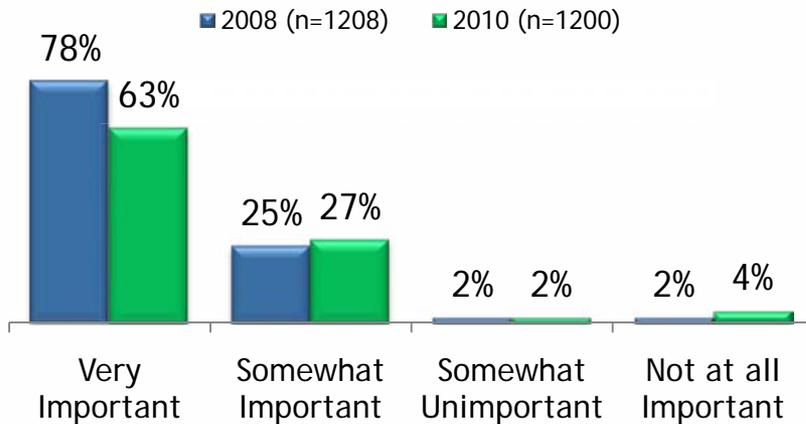
F4 You said your last ferry ride was on the [INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?
NEW1 For what other purposes do you take any Washington State Ferries?



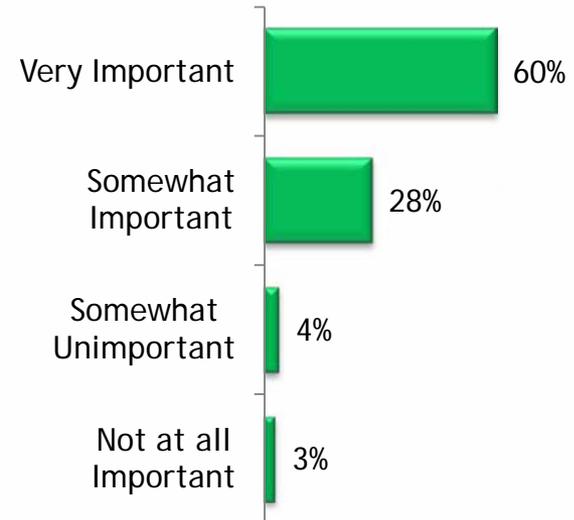
WSF Importance to Region (Within General Public)

- ❖ The perceived importance of WSF to the general economy and growth of the economy has declined significantly.
 - The Westside communities place significantly more importance on WSF than Eastside communities (77% vs. 61% very important).

Importance of WSF to Economy and Growth of the Region



Importance of WSF to Encourage Tourism



- ❖ Again, the Westside communities place significantly more importance on WSF to encourage tourism than Eastside communities (69% vs. 59% very important).

F7 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the region? Would you say...

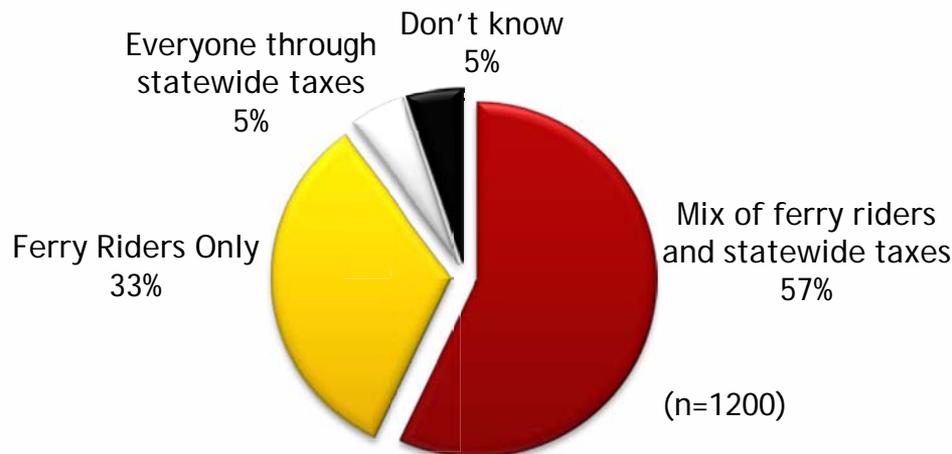
NEW3 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the region? Would you say...



Daily Operations Funding (within General Public)

- ❖ Almost three in five (57%) think that the daily operating expenses for WSF should be funded through a mix of ferry riders and statewide taxes.
 - There are no significant difference between East and Westside communities on how daily operations should be funded.
- ❖ Among those who think the daily operations should be funded through a combination of fares and taxes, a third (33%) don't know what percent should be paid by riders. Those who have an opinion, state that on average riders should pay 56.6% of the daily operating costs.

How WSF Daily Operations Should Be Funded



Ferry riders should pay on average 56.6% of WSF's daily operating costs

- Eastside residents report that riders should pay an average of 57.6% vs. 49.2% for Westside residents.

NEW4 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:

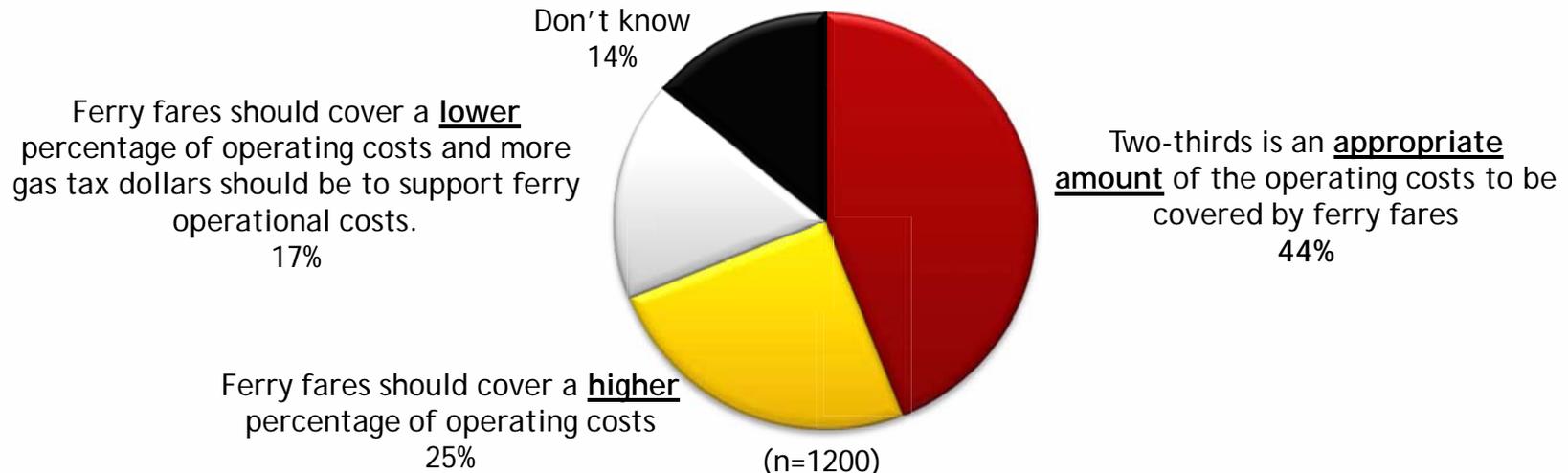
NEW5 What percent of the daily operation costs do you feel riders should pay?



Farebox Recovery Rate Opinions (Within General Public)

- ❖ On average, Puget Sound residents think that fares cover 44.2% of WSF's annual operating expenses (Eastside 43% vs. 51% Westside).
- ❖ Almost half (44%) think that it is appropriate that ferry fares cover 2/3 of operating expenses.
 - Westside residents are significantly more likely to think that fares should cover a smaller percentage (27% vs. 15%), where as Eastside residents think that fares should cover a greater percentage (26% vs. 13%).

How Much Should Fares Cover of Annual Operating Costs



NEW6 What percentage of WSF's annual operational costs do you think fares currently cover?

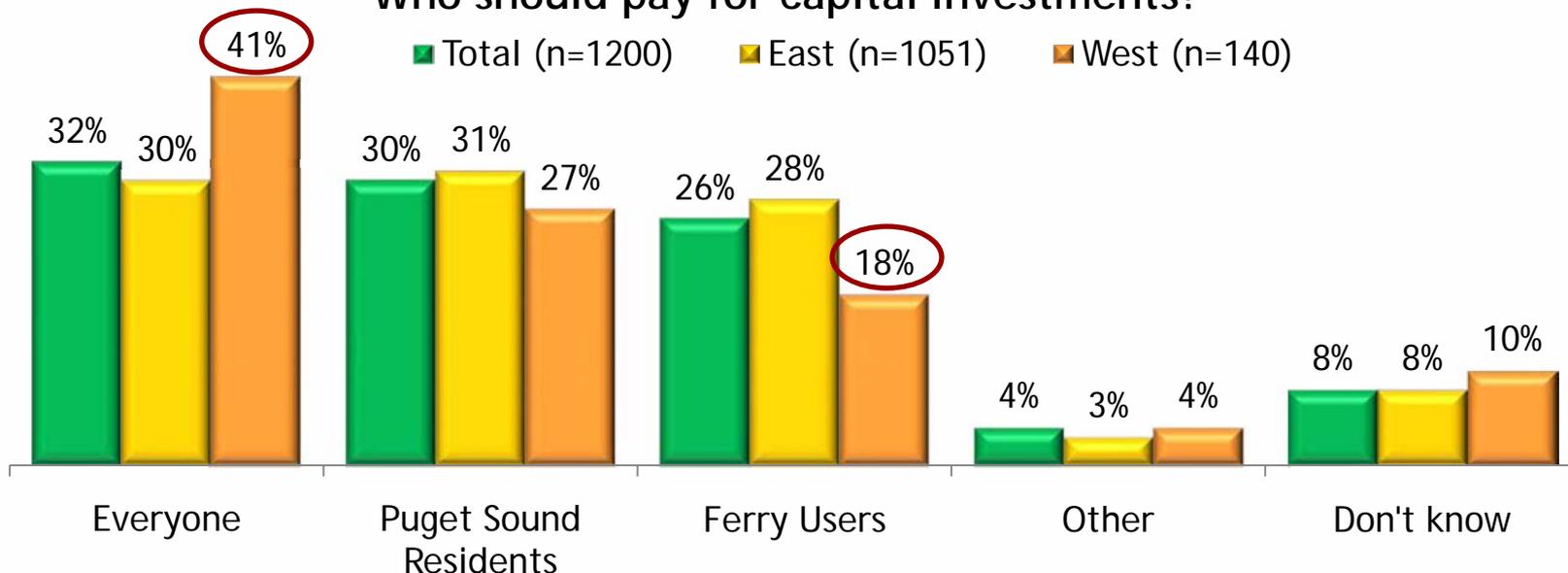
NEW7 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?



Capital Funding (within General Public)

- ❖ Residents are divided in roughly thirds when it comes to who should pay for capital investments.
 - Westside residents are significantly more likely to say “everybody” should pay and they are less likely to want “ferry users” to pay compared to Eastside residents.

Who should pay for capital investments?



NEW8 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:



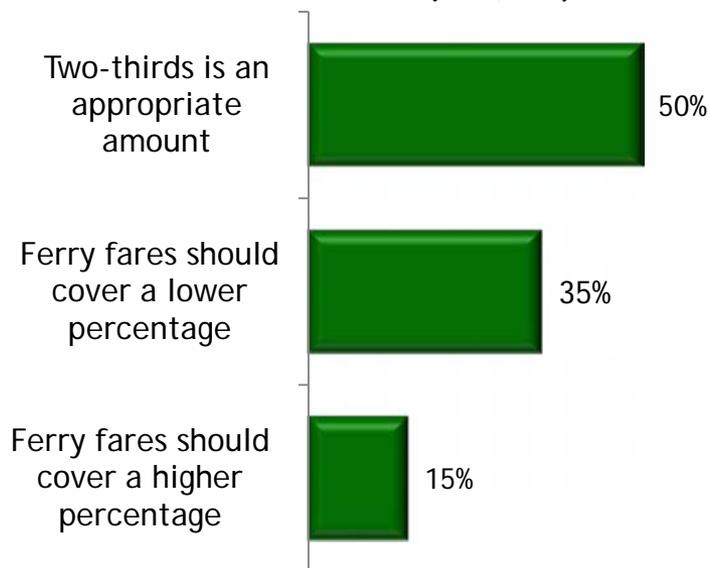
Farebox Recovery Rate Opinions

(Winter - Ferry Riders)

58% - Estimated ferry fare coverage of WSF's operational costs

35% - Don't know/couldn't say
(n=4,058)

Coverage of WSF's Operational Costs
(n=3,896)



Q10 What percentage of WSF's annual operational costs do you think fares currently cover?

Q11 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

- ❖ Of the ferry riders who provided an estimate of the percentage of WSF's annual operational costs covered by ferry fares, the perception is **relatively close** to the actual number (58% vs. 66% actual).
 - However, more than one third (35%) of riders stated that they didn't know or couldn't say.
- ❖ Once the actual percentage is revealed, half (50%) of ferry riders agree that **two-thirds is an appropriate amount**.
 - Over one third (35%) feel that ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be diverted from currently planned statewide transportation activities to support ferry operational costs.
- ❖ Riders who always board the ferry by walking or biking are more likely to agree that two-thirds is an appropriate amount.



WSF Operational Costs - By route (Winter)

❖ One in seven (15%) ferry riders feel that ferry fares should cover a higher percentage of operating costs (Seattle/Bremerton 20% and Port Townsend/Key Stone 30%).

Estimated Fare Coverage of WSF's Operations Costs	SEA/ BAIN n=1084	SEA/ BREM n=458	EDM/ KIN n=768	FAU/ VAS n=376	FAU/ SOU n=151	SOU/ VAS n=31	PTD/ TAH n=118	MUK/ CLI n=757	PTT/ KEY n=85	ANA/ SJI n=201	INTER SJI n=29*
Actual Fare Box Recovery Ratio (2009 Route Statements)	92%	48%	94%	53%			40%	84%	39%	43%	
Estimated Percentage / Median Percentage of WSF Operational Costs Fares Cover	56% / 53%	57% / 54%	59% / 60%	61% / 62%	57% / 56%	54% / 57%	60% / 61%	61% / 60%	54% / 51%	53% / 51%	63% / 54%
Don't know/couldn't say	32%	37%	33%	30%	35%	46%	43%	39%	43%	40%	19%

Actual Fare Coverage of WSF's Operations Costs	SEA/ BAIN n=1037	SEA/ BREM n=429	EDM/ KIN n=745	FAU/ VAS n=357	FAU/ SOU n=142	SOU/ VAS n=28*	PTD/ TAH n=112	MUK/ CLI n=743	PTT/ KEY n=79	ANA/ SJI n=198	INTER SJI n=25*
Two-thirds is an appropriate amount	48%	49%	49%	48%	60%	48%	44%	56%	48%	45%	41%
Should cover a <u>lower</u> percentage/more gas tax dollars should be diverted from planned transportation activities	37%	31%	34%	44%	27%	52%	53%	30%	22%	42%	47%
Should cover a <u>higher</u> percentage	15%	20%	17%	8%	13%	--	4%	13%	30%	13%	13%

Q10 What percentage of WSF's annual operational costs do you think fares currently cover?

* Caution: Small sample sizes

Q11 Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

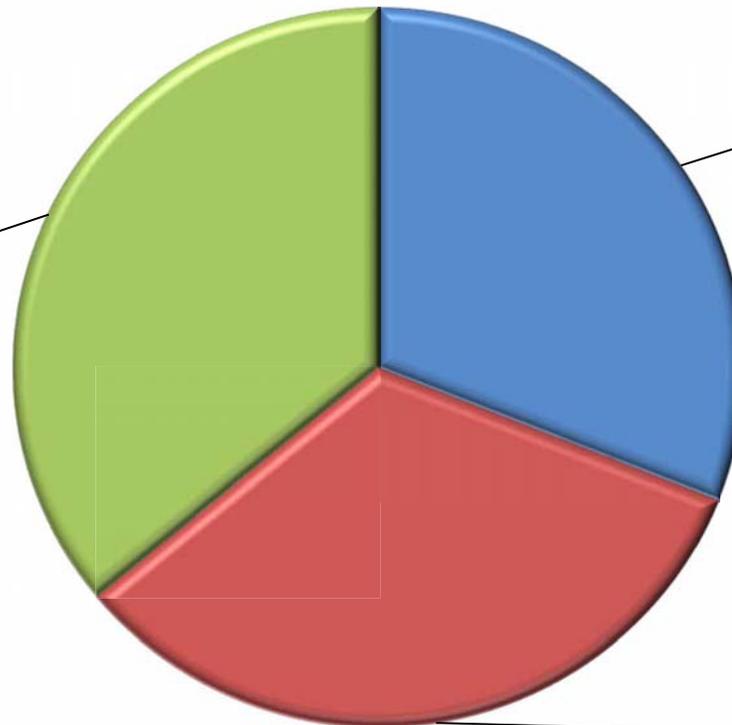


Fare Increase vs. Service Cut Quick Poll

If you were forced to select one option, which of these (two) would more likely cause you to severely reduce your ferry ridership?

Increase fares on your route by a third (but keep the frequency the same on your route) would, 36%

(n=2,828 Ferry Riders)
Quick Poll on 2/5/10



Cutting the ferry schedule on your route by a third (but keep the fare the same) would, 31%

Neither cutting schedules nor increasing fares would cause me to severely reduce my ferry ridership, 33%



Freight Customers

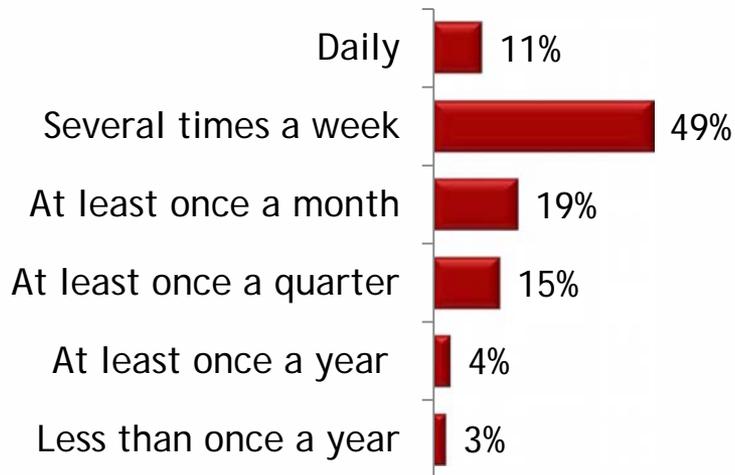


Ferry Usage (by Freight Customers)

- ❖ Three in five (60%) transport goods or services using WSF weekly.
- ❖ Traffic is significantly higher during spring/summer with an average of 28 trips per month.

Frequency of Ferry Trips

(n=101)



Ferry Travel Behavior

(n=101)

33% Consistent travel frequency

- 14 average monthly one-way crossings

67% Seasonal travel frequency

- 18 average monthly one way crossings
October through March
- 28 average monthly one way crossings
April through September

S3

How frequently do you use the Washington State Ferries to transport goods and services by truck?

S4

Is the average number of crossings made by your trucks that use the Washington State Ferries different in October through March than it is in April through September?

S4A/S5A/S5B

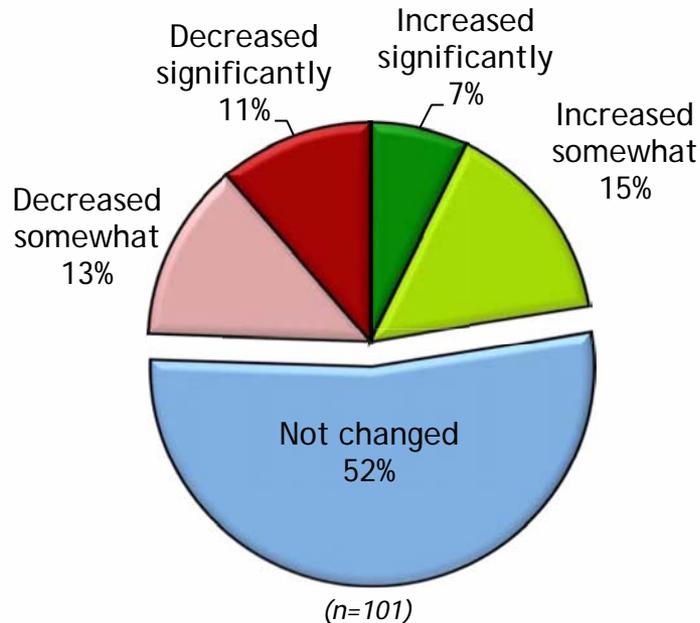
Approximately how many one-way crossings are made by your trucks that use the Washington State Ferries in a typical month/from October through March/from April through September?



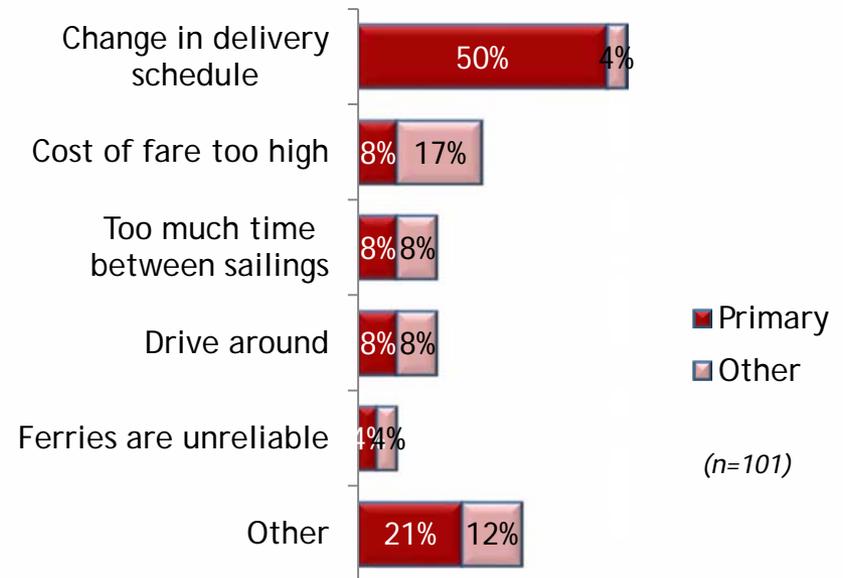
Travel Behavior (by Freight Customers)

- ❖ Three in five (74%) freight customers have either increased or kept their usage of the ferries the same.
- ❖ One quarter (24%) have decreased their usage and the main reason has been a change in their delivery schedule followed by cost of fare too high.

Changes in Travel Behavior



Reason for Decreased Travel



Q33 Since you/your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries...

Q34 What is the primary reason for the decrease?

Q35 What other reasons are there?

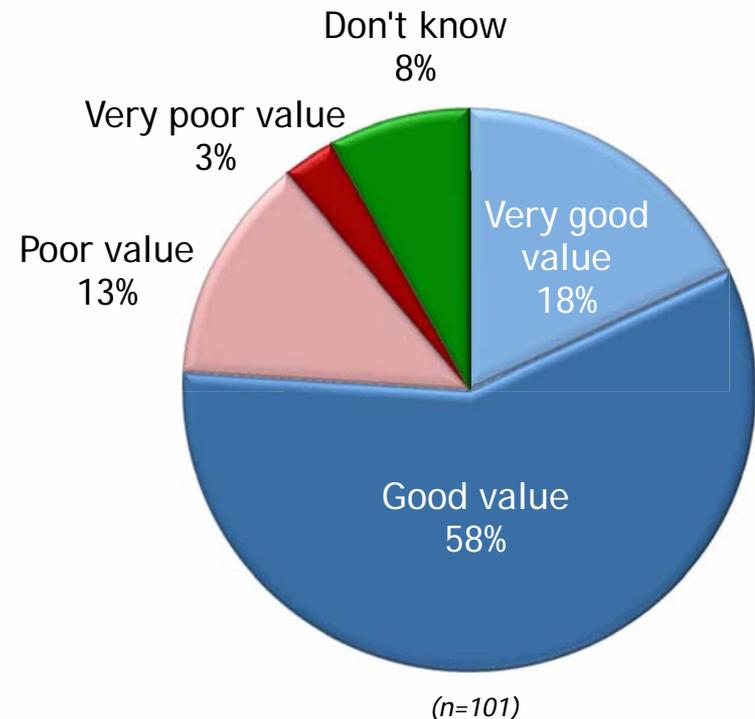


Travel Behavior (By Freight Customers)

- ❖ Slightly more than three-quarters (76%) state that the Washington State Ferries provide *very good* (18%) or *good* value (58%).
 - Only one in six (16%) perceive the value to be poor (13% poor and 3% very poor).

- ❖ Beside lowering price, the most frequently mentioned suggestions for how WSF could help freight customers are:
 - Have more crossings
 - Provide a reservation system
 - Less wait time
 - Availability for commercial runs

Value Perceptions



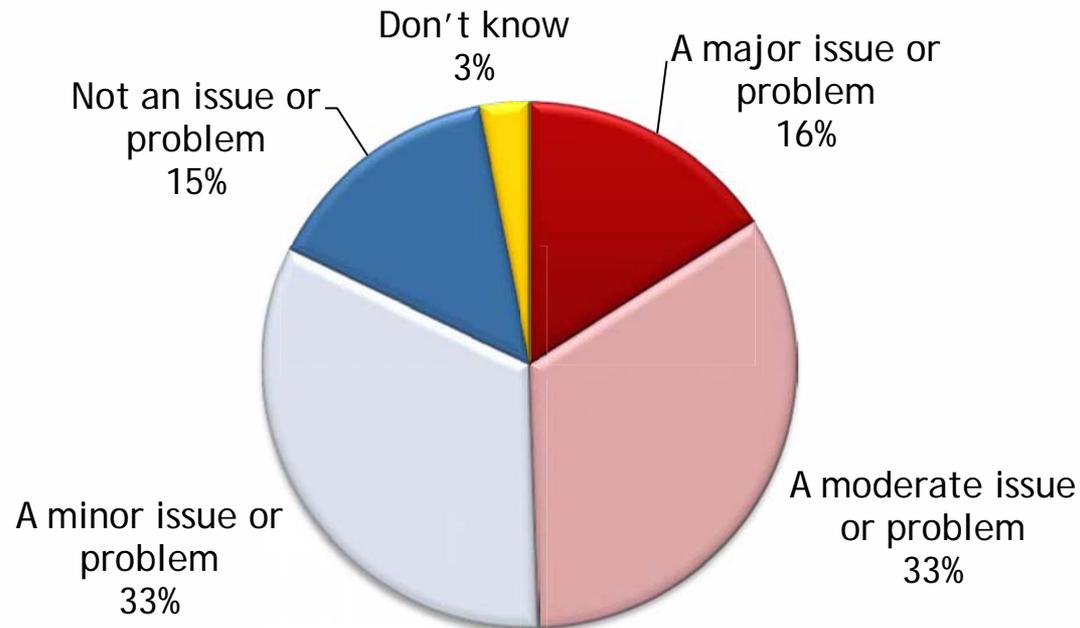
- Q36 Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination?
- Q37 Other than lowering the price, what else could Washington State Ferries do to help you move freight more efficiently on the ferries?



Wait Times (by Freight Customers)

- ❖ Just under half (49%) freight customers report that wait time during peak travel periods is either a *major* (16%) or *moderate* (33%) issue.

Impact of Wait Time During Peak Hours



(n=101)

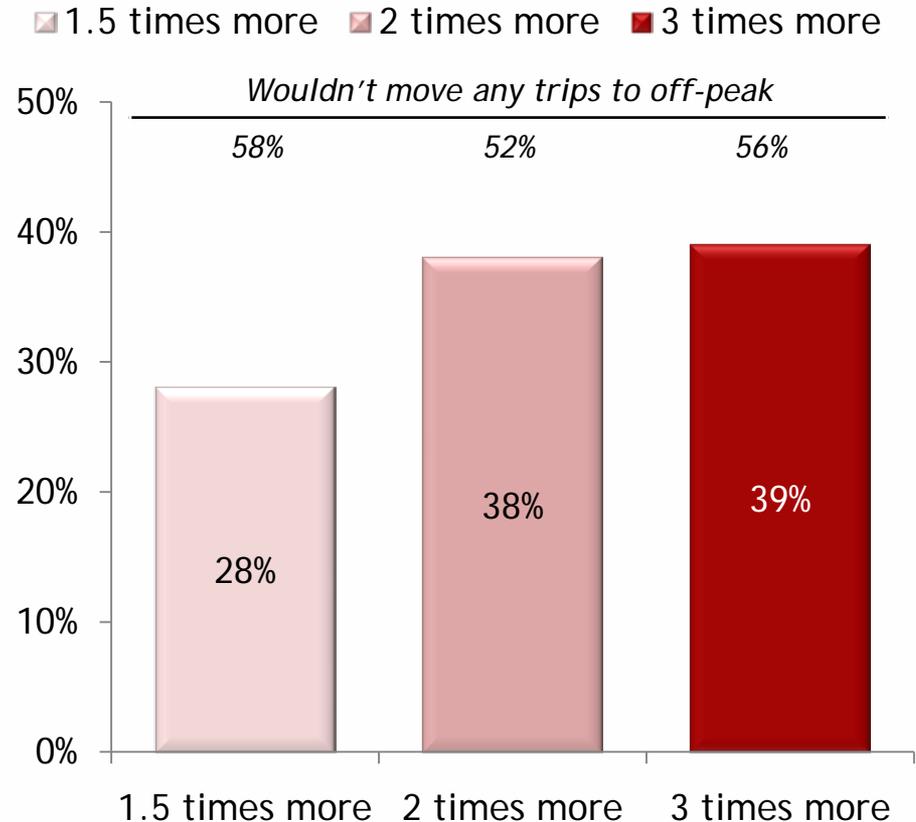
Q11 One problem that commercial vehicle drivers have reported during peak vehicle commute travel periods is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say the wait time is for you or your drivers?



Congestion Pricing (Freight Customers)

- ❖ The higher the surcharge/premium for peak hour travel, the more truck trips would be shifted to off-peak hours.
- ❖ If the premium was 3 times the current fare, freight customers report that, on average, 39% of their truck trips would shift to off-peak hours.
 - It should be noted that more than half of freight customers would/could not move their truck trips.

Impact of Peak Fare Increase



Q25-27 If freight customers who use the ferry during peak travel periods were charged one and a half times/double/three times the fare currently charged for trucks, what percent of your truck trips would you move to off-peak times?



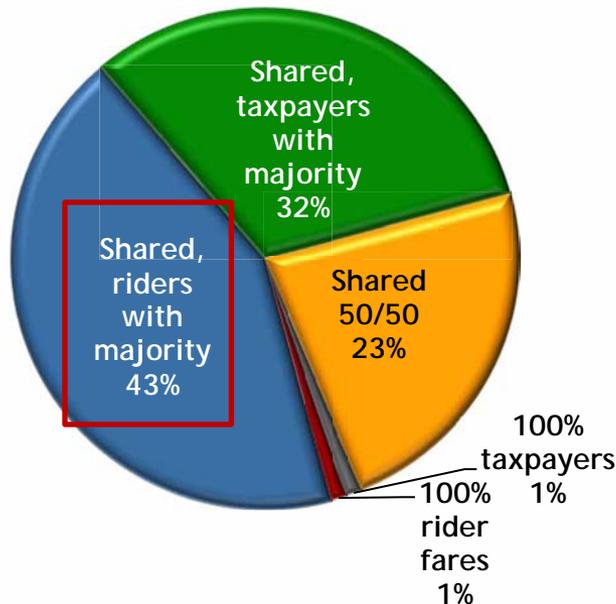
Capital Funding Issues



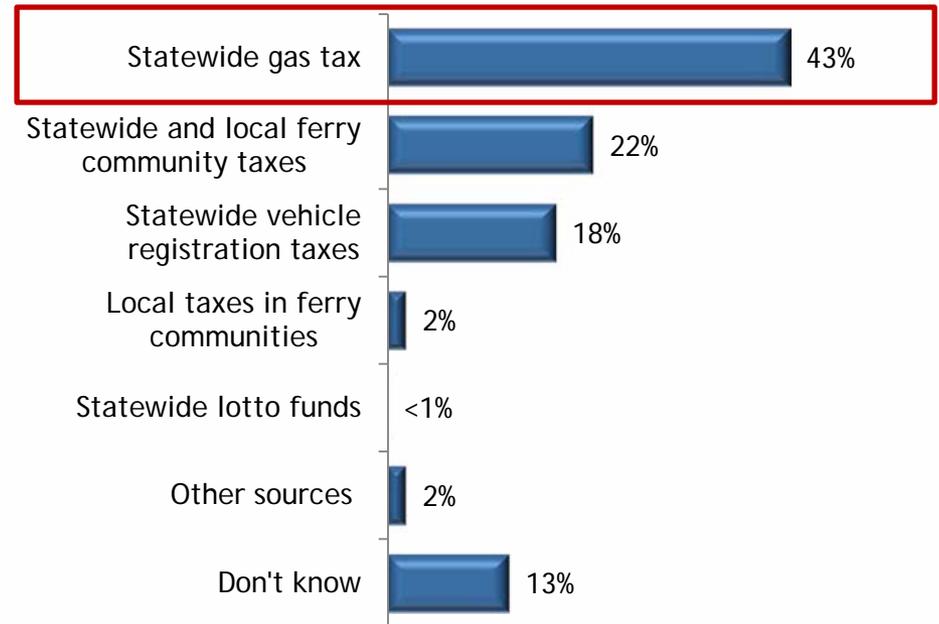
Current Sources of Operational Funding

- ❖ Only 43% correctly identified the source of WSF funding for daily operations in the capital funding study.
- ❖ When told that ferry fares cover 65% of WSF operating costs, 43% of riders believe that the remaining 35% is covered by statewide gas taxes.

Sources of Operational Funding
(n=1,951)



Coverage of Remaining Operational Costs
(n=1,951)



C1a Based on what you have seen or heard, which ONE of the five statements below best represents where Washington State Ferries (WSF) currently gets their money for daily operations?

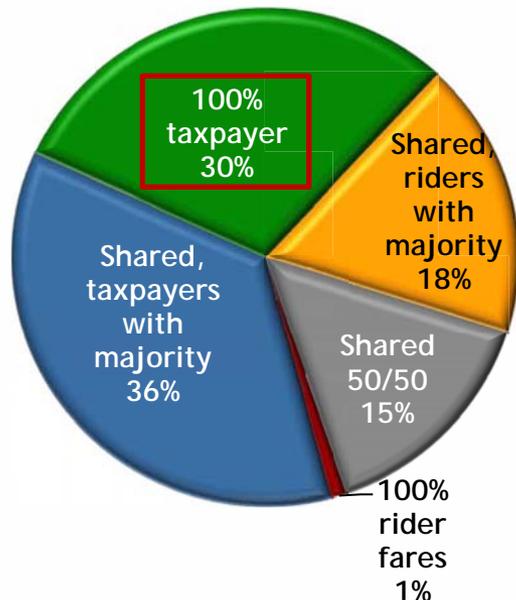
C1b In reality, ferry fares cover about two thirds (65%) of the operational costs of running the ferries. Based on your knowledge, where does the money to cover the remaining 35% of WSF operational costs come from?



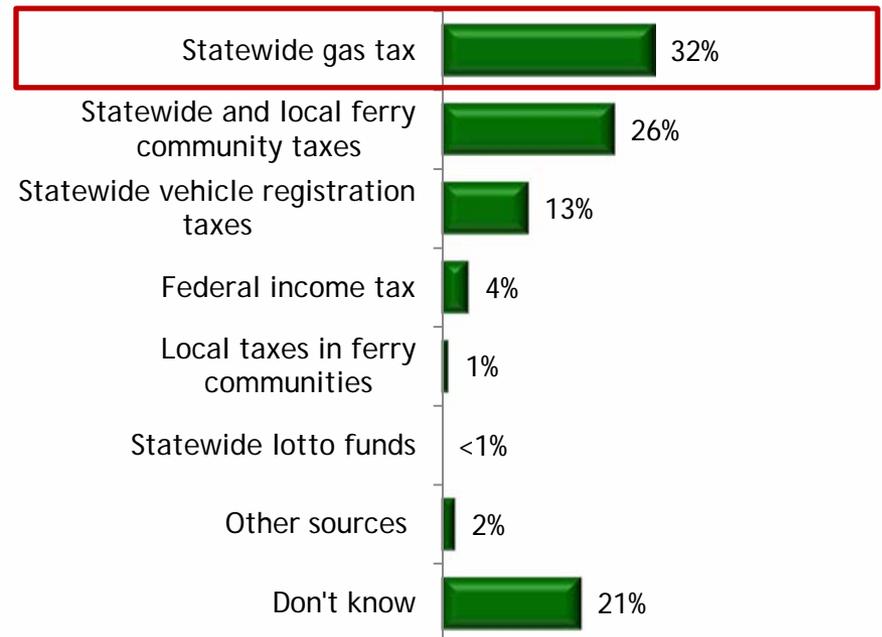
Current Sources of Capital Funding

- ❖ Roughly one third (30%) correctly identify taxpayers as the source of 100% of WSF capital funding in the capital funding study.
- ❖ The largest proportion of ferry riders - 32% - believe WSF's capital needs come from statewide gas taxes.

Sources of Capital Funding
(n=1,951)



Coverage of WSF Capital Needs
(n=1,951)



C2a Again based on what you have seen or heard, which ONE of the five statements below best represents where Washington State Ferries (WSF) currently gets its money for capital funding?

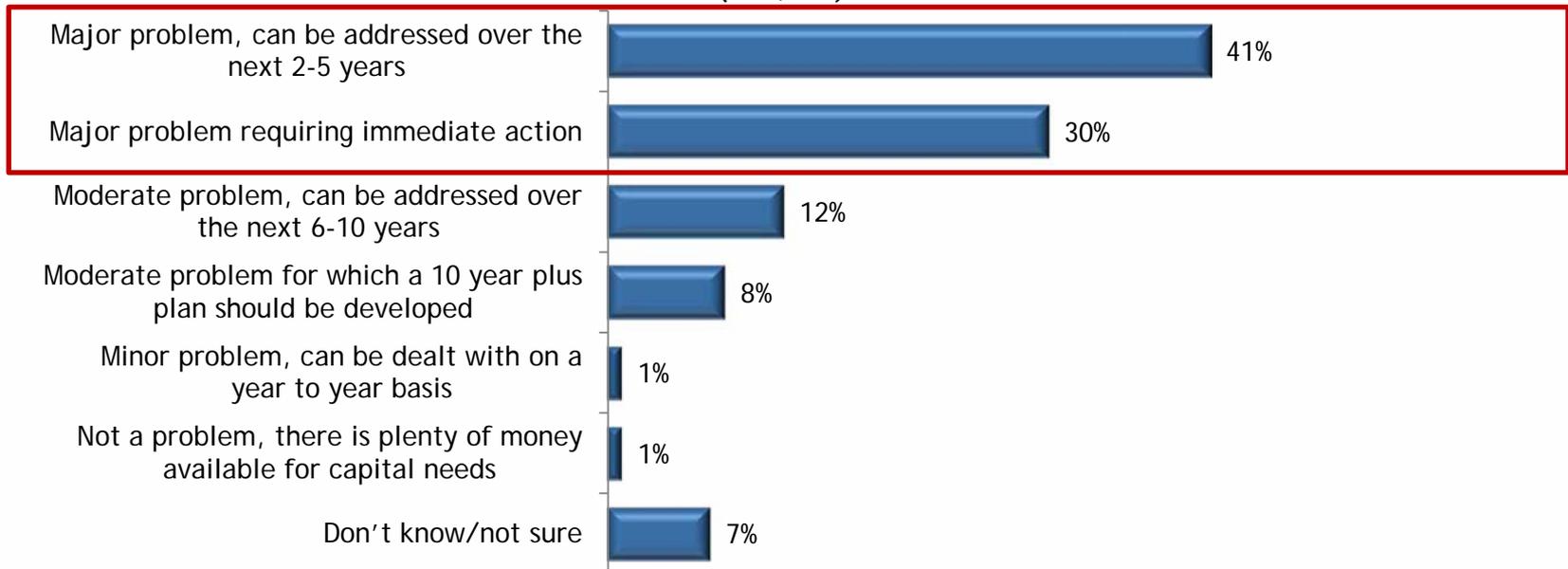
C2b In reality, ferry fares do not provide any funding for WSF capital needs. Based on your knowledge, where does the money to cover the WSF capital needs come from?



Capital Funding Problem

- ❖ Nearly three fourths (71%) of ferry riders in the capital funding study feel that funding for WSF's capital needs is a **major problem**, with one third (30%) of those respondents indicating that it needs to be **dealt with now** and 41% stating that it needs to be addressed in the **next 2-5 years**.

Capital Funding Problem
(n=1,951)



C3 Since capital funding isn't covered by ferry fares, how big of a problem do you think funding for WSF capital needs are?

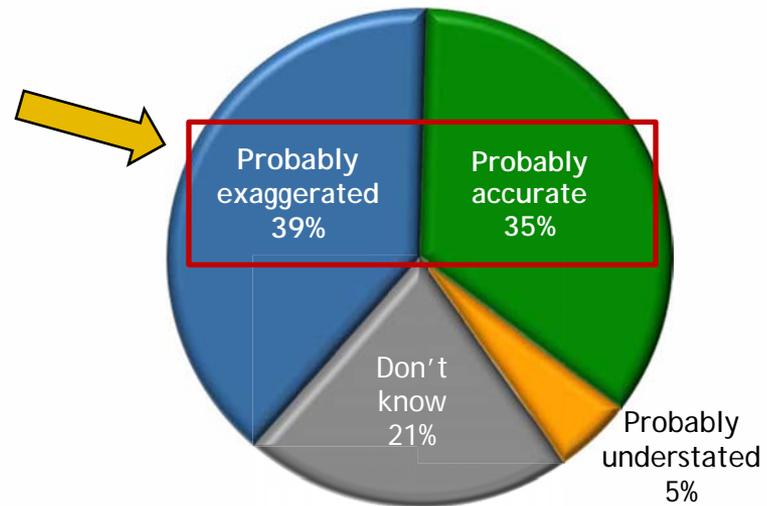


Rider Opinion of WSF Capital Funding Need

Capital Funds Need is ...
(n=1,951)

- ❖ Two fifths (39%) say the \$4 billion needed for capital funding is **exaggerated**; however, 35% believe that the quoted deficit is **probably accurate**.

C9 If you heard that the WSF long-term capital funding problem equates to an unfunded need for approximately half a million dollars a day in **additional funding just to maintain the current level of service** over the next 22 years (a total of \$4 billion in additional funding), would you say that this amount is...



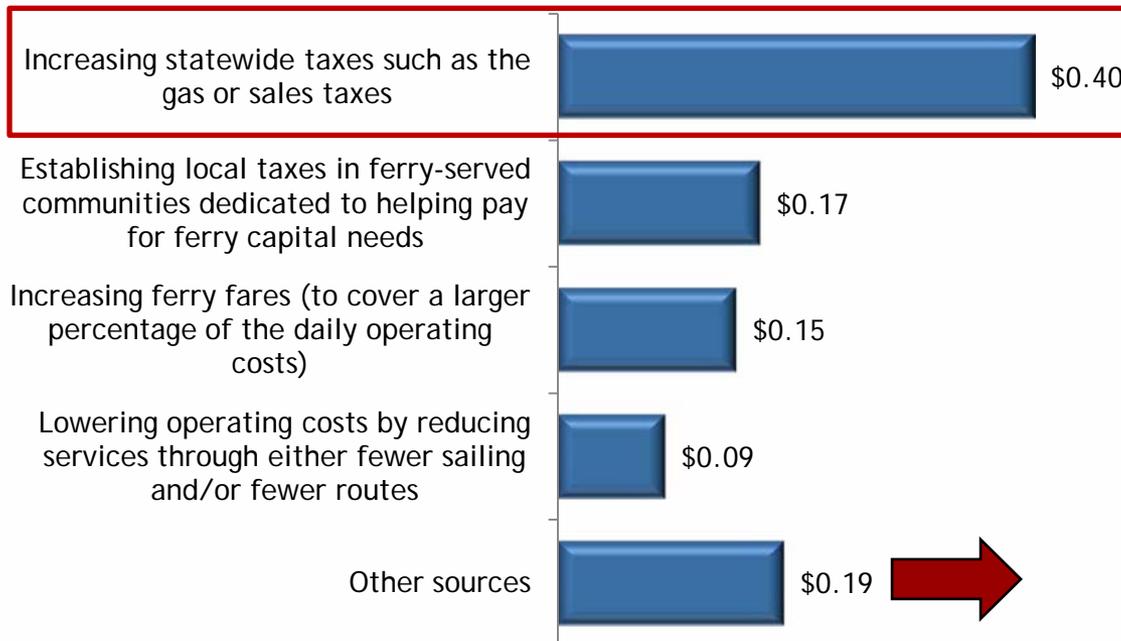
Capital Funds Need is	SEA/ BAIN n=510	SEA/ BREM n=215	EDM/ KIN n=361	FAU/ VAS n=163	FAU/ SOU n=68	SOU/ VAS n=15*	PTD/ TAH n=55	MUK/ CLI n=335	PTT/ COU n=51	ANA/ FRI n=164	INTR SJI n=14*
Probably exaggerated	39%	39%	41%	35%	35%	44%	46%	38%	28%	39%	40%
Probably accurate	37%	33%	32%	40%	38%	44%	27%	34%	40%	40%	33%
Probably understated	6%	7%	6%	2%	6%	0%	4%	6%	2%	5%	3%
Don't know	18%	21%	21%	22%	22%	11%	23%	23%	30%	16%	25%



Capital Funding Revenue Sources

- ❖ On average, ferry riders in the capital funding study believe that \$.40 of every dollar of WSF's capital funding needs should come from an increase in statewide taxes, such as gas or sales tax.

The Capital Funding Dollar Should Come From... (n=1,951)



Other Top Suggested Revenue Sources (Percentages below are based on 960 riders who in C10 said "other sources")	
Improve WSF administrative & management spending	18%
Transportation funding	16%
Federal funding	10%
Reduce WSF employee benefits & wages	10%
WSF staff reductions	8%
Lottery/gambling funding	7%
Advertising & corporate sponsorship	7%
Vehicle licensing & registration fees	6%

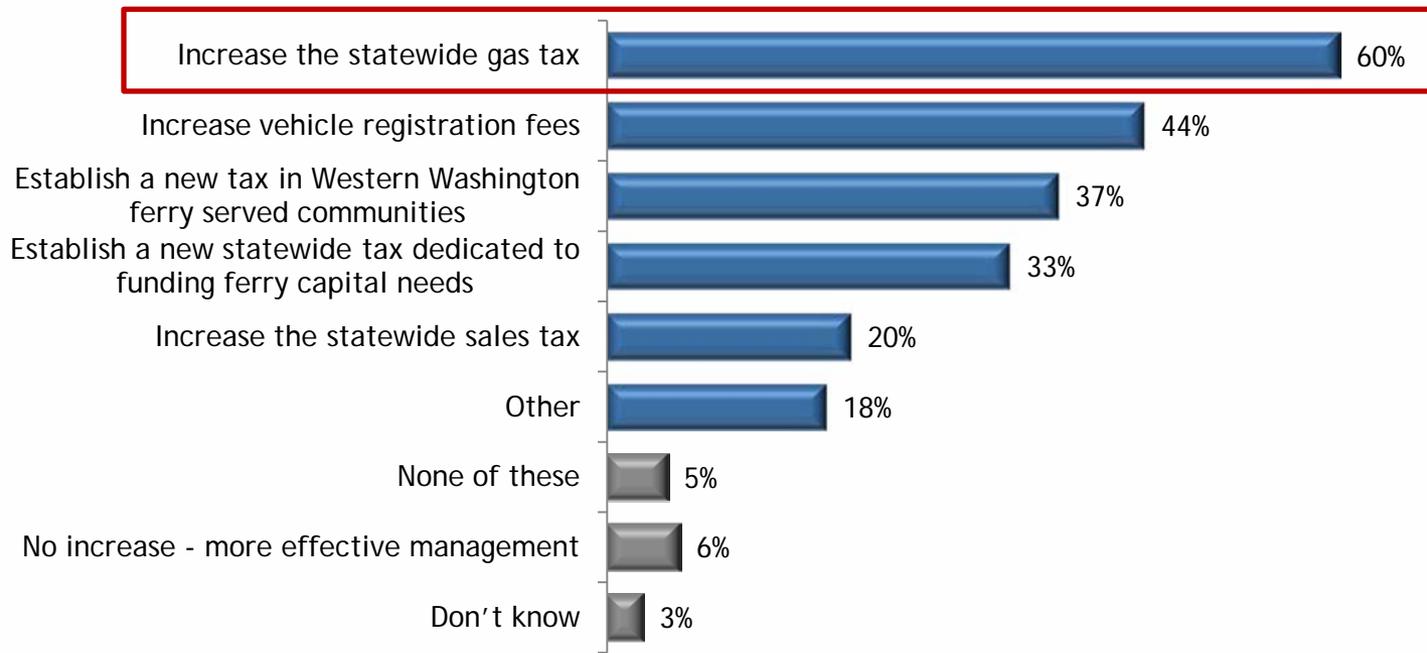
C10 If the following revenue sources were used to pay for WSF's capital funding needs, what percent of the total funding need do you believe should come from each revenue source?



Recommended Capital Funding Methods

- ❖ Of the funding options tested, increasing the statewide gas tax has the highest support (60%) for funding WSF capital needs, while an increase in the statewide sales tax has the least support in the capital funding study.

Recommended Capital Funding Methods
(n=1,951)



C11 Which of the following funding methods, if any, would you recommend be used to fund the capital needs of the ferries?

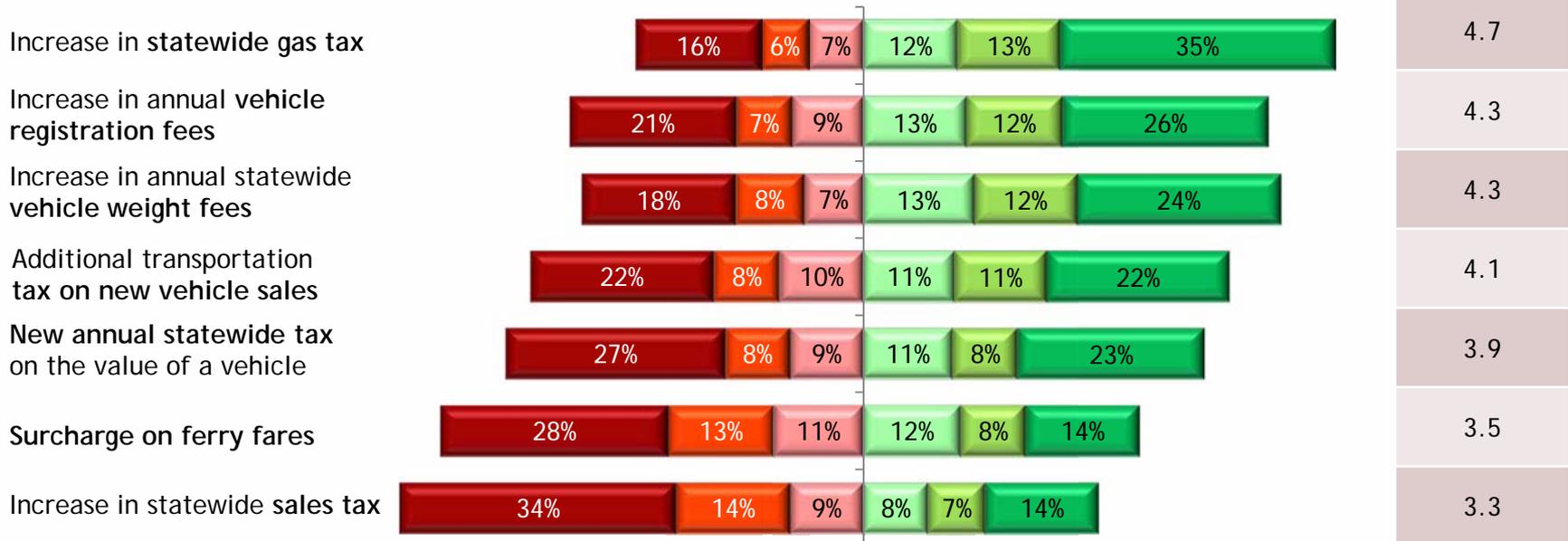


Support for Selected Capital Funding Methods

- ❖ Support for funding ferry capital costs is highest (35% would completely support) for increasing the statewide gas tax of the seven methods tested in the capital funding study.
- ❖ Increasing the statewide sales tax and introducing a fare surcharge have the lowest support of the seven alternatives tested.

Support of WSF Capital Funding

Would not support at all ← (n=1,951) → Would completely support



Note: Ratings for "neutral" (4) and "don't know" are not shown

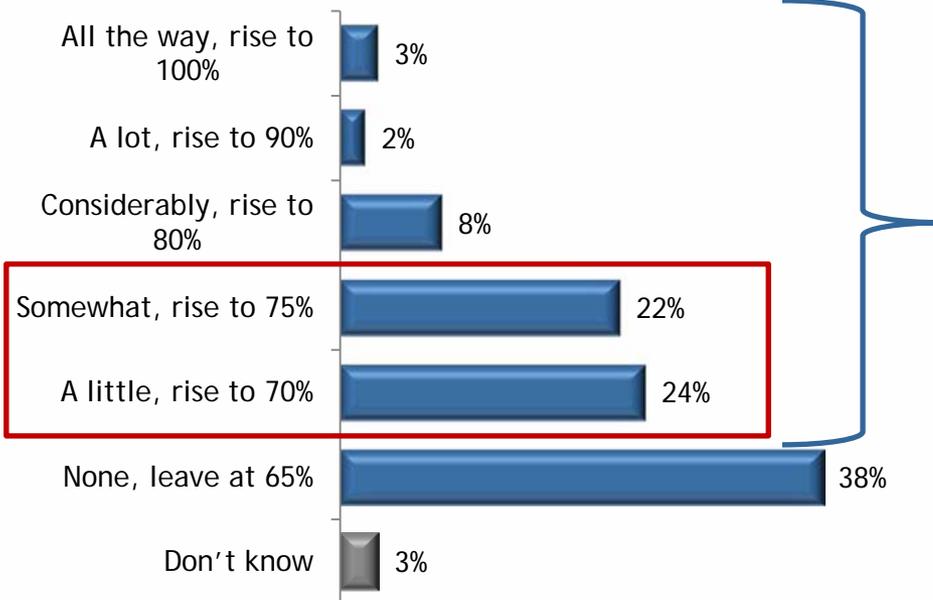
C12 How supportive, if at all, would you be of...



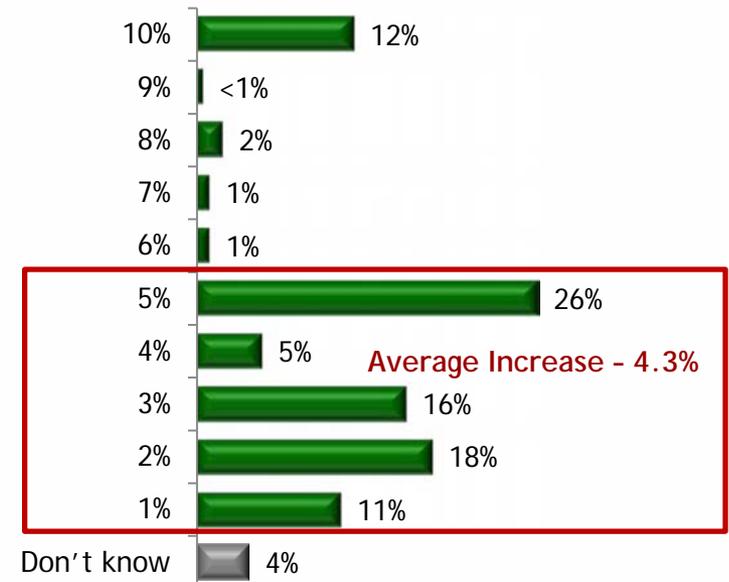
Increase in Fares for Capital Funding

- ❖ Three fifths (62%) of ferry riders in the capital funding study support increasing the fare coverage of operational costs - 24% say the recovery rate should be 70%, 22% say 75%, 8% say 80%, 2% say 90%, and 3% say fares should cover all operating costs to free money for capital funding.
 - Roughly two fifths (38%) do not support any increase above the current 65% recovery rate.
- ❖ Those who support higher coverage of operating costs from fares to free up money for capital funding feel fares should increase about 4% annually, on average.

Fare Increase Goal for Capital Funding
(n=1,951)



Reasonable Annual Increase to Achieve Goal
(n=1,157)



C13 How much, if any, would you suggest fares be increased to cover more of the daily operating costs?

C14 To achieve this goal, fares should be raised an additional...



Support for Fare Change for Capital Funding

- ❖ More than two fifth (45%) of ferry riders in the capital funding study would completely support charging an additional \$.10 per fare with the monies collected going into a dedicated fund for ferry capital improvements.
- ❖ One third of riders would not support at all a multi-ride ticket priced 20% less than a single ride ticket (32%) or charging an additional \$1-5 per vehicle ticket and \$.50 per passenger ticket (33%).



Note: Ratings for "neutral" (4) and "don't know" are not shown

C15 How supportive, if at all, would you be of... (1 = "Would not support at all"; 7 = "Would completely support")



Mode Shift & Fare Elasticity

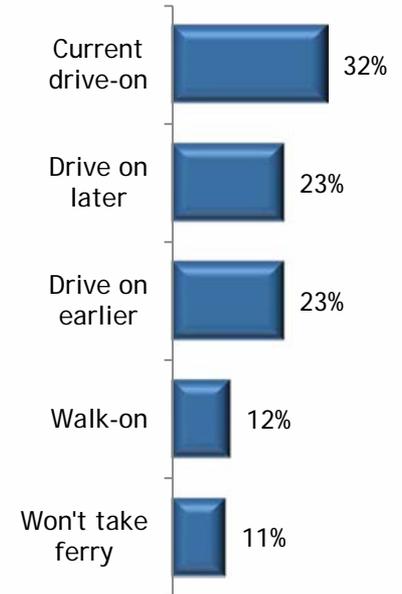


Scenario #5

The graph to the right shows the percent of riders that selected each Major Travel Option in this scenario.

Scenario 5 of 12	OPTION A	OPTION B	OPTION C	OPTION D	OPTION E
MAJOR TRAVEL OPTIONS	CURRENT DRIVE-ON	WALK-ON	DRIVE ON EARLIER	DRIVE ON LATER	DON'T TAKE FERRY
ORIGINATION SIDE TRAVEL	Drive my car to Ferry	Dropped off at terminal	Drive my car to Ferry	Drive my car to Ferry	Given these drive-on and walk-on options/fares, I would just not use the ferries and find some other way to accomplish my trip purpose (either on-island or combined with another trip or not at all).
ARRIVAL SIDE TRAVEL	Drive my car to destination	Terminal 2nd car park @ \$8	Drive my car to destination	Drive my car to destination	
FERRY DEPARTURE TIME	=Q5 response	=Q5 response	First off-peak sailing prior to Q2 peak period	First off-peak sailing after Q2 peak period	
FERRY WAIT TIME	=Q7A response + two sailings	5 min	5 min	5 min	
FERRY FARE	Current vehicle fare 0%	Current passenger fare -15%	Current vehicle fare -20%	Current vehicle fare 0%	
TOTAL TRAVEL TIME	(Q10) min. + addt'l wait time	(Q10) min.	(Q10) min. less (Q7A) + 5 min.	(Q10) min. less (Q7A) + 5 min.	
TOTAL TRAVEL COSTS	(Q11) response + addt'l fare	Walk on fare + parking costs + Q11*(Q9/(Q6+Q9))	(Q11) less off peak fare savings	(Q11) less off peak fare savings	

Scenario #5 Travel Selection
(n=1,317)

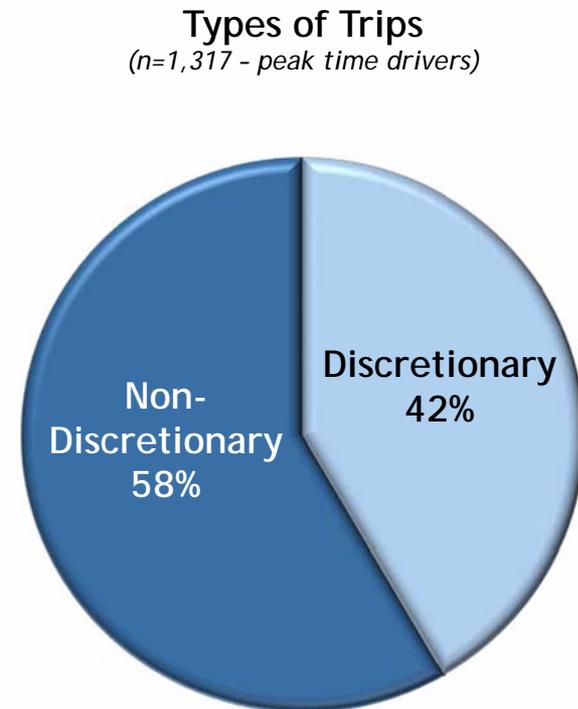
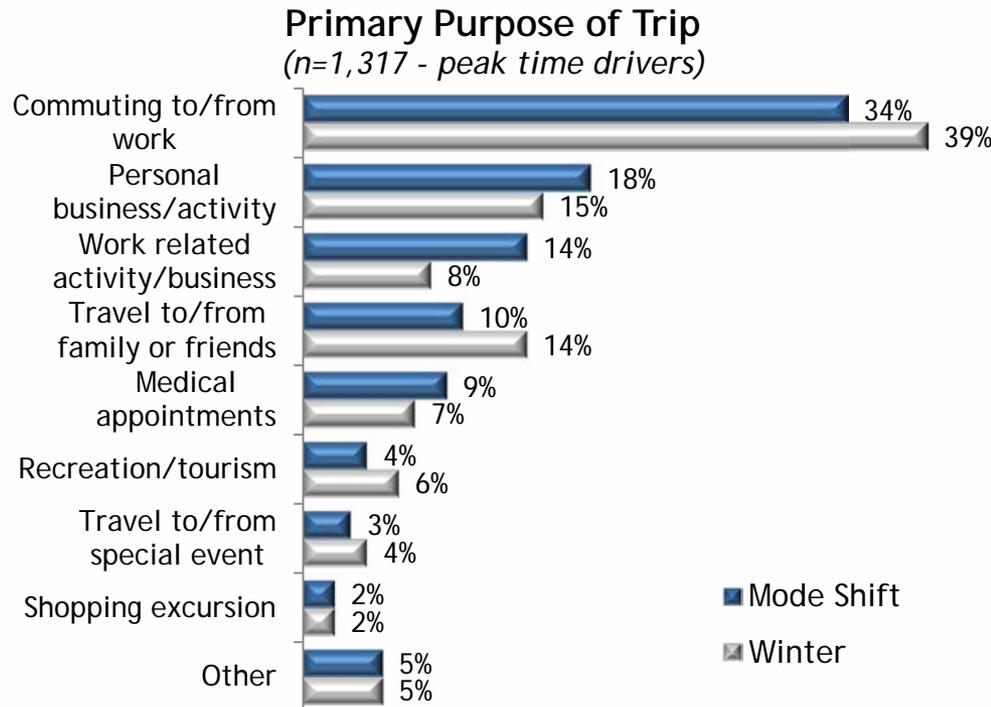


Q01 If scenario #5 were the only travel options available when you were making your previous <Q1 direction> <Q2route> trip for the purpose of <Q4 purpose>, which option would you have most likely chosen?



Peak Vehicle Drivers: Trip Purpose Specific

- ❖ One third of peak hour drivers indicate **commuting to/from work** as the primary purpose of their last ferry trip.
 - Special event and shopping excursion travel accounted for only 5% of total responses.
 - Over half of Fauntleroy/Southworth riders report the purpose of **commuting to/from work**, while 21% of Port Townsend/Coupeville riders indicate traveling for **tourism/recreation**, both significantly more than riders of other routes.



Q4 What was your primary purpose for the trip described above?



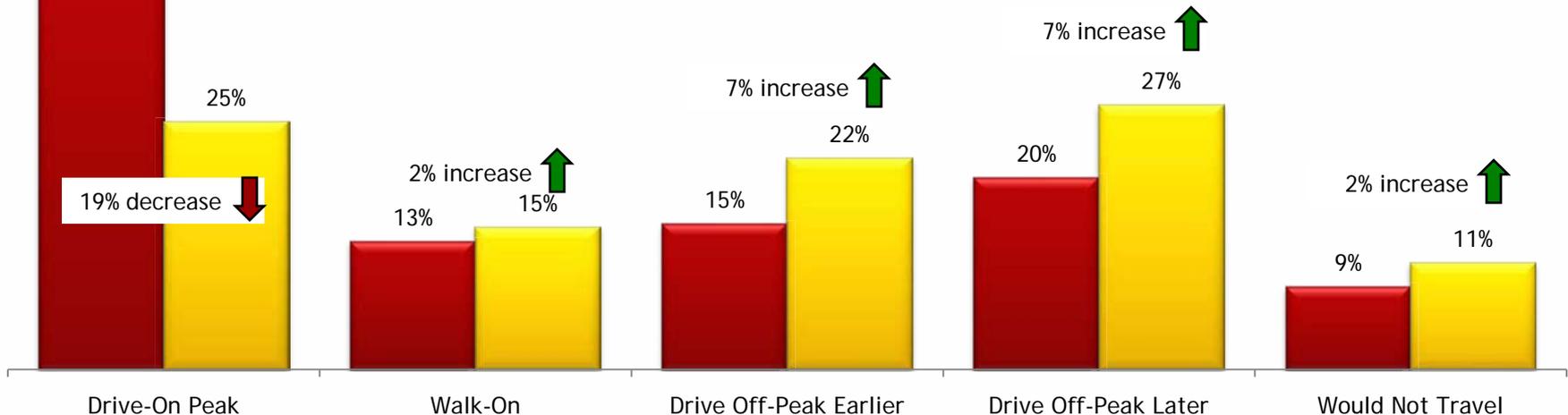
Simulator Result: Best vs. Base Case

- ❖ The graph below shows the results of making driving on at peak a less attractive option for drivers. This would represent the maximum mode shift based on the attributes tested.
 - To do this, the following levels were set for the best case; A 25% increase in peak vehicle fares; An additional 2 boat wait for peak vehicle drivers; A 20% decrease in walk-on fares; and A 20% decrease in off peak vehicle fares.
- ❖ By selecting the options that make driving on at peak relatively more costly in terms of money (45 percentage point spread between peak vehicle fares and off peak vehicle fares and walk-on fares) and time (2 additional boat wait for peak vehicle drivers), the simulation would suggest that a maximum of 19 percentage points of peak vehicle drivers can be shifted (2 percentage point increase in walk-on at peak and 14 percentage points in driving off-peak (either earlier or later)).
 - There would also be a total system-wide loss of ridership of 2 percentage points.

TOTAL: Base vs. Best Case

(increases/decreases reported in percentage points)

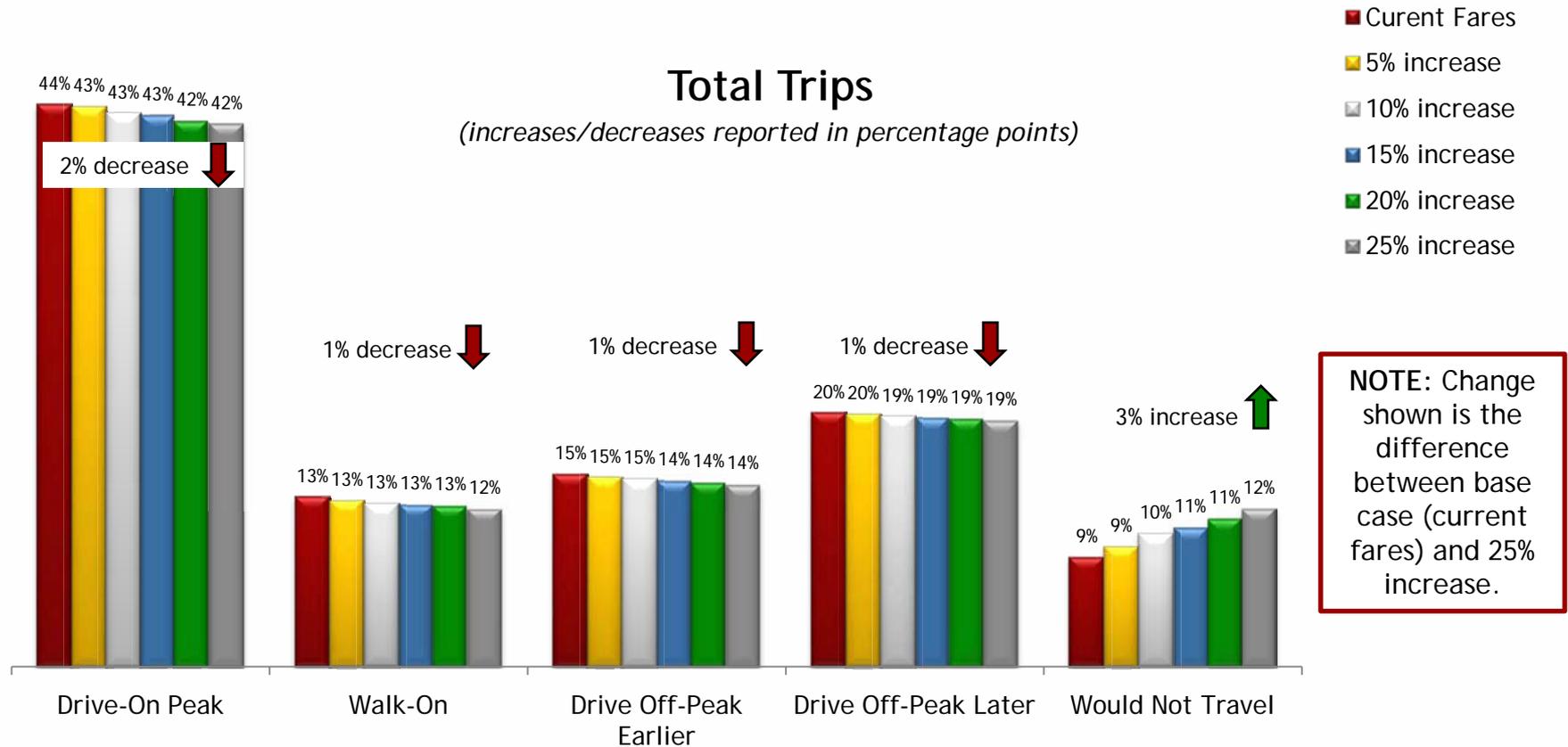
■ Base ■ Best





Simulator Result: *Across the Board Fare Increases*

- ❖ Raising drive-on and walk-on fares by the same percentage does not change the mode peak vehicle drivers will use.
- ❖ The overall result of the 25% fare increase could be a 3 percentage point decrease in total ridership.





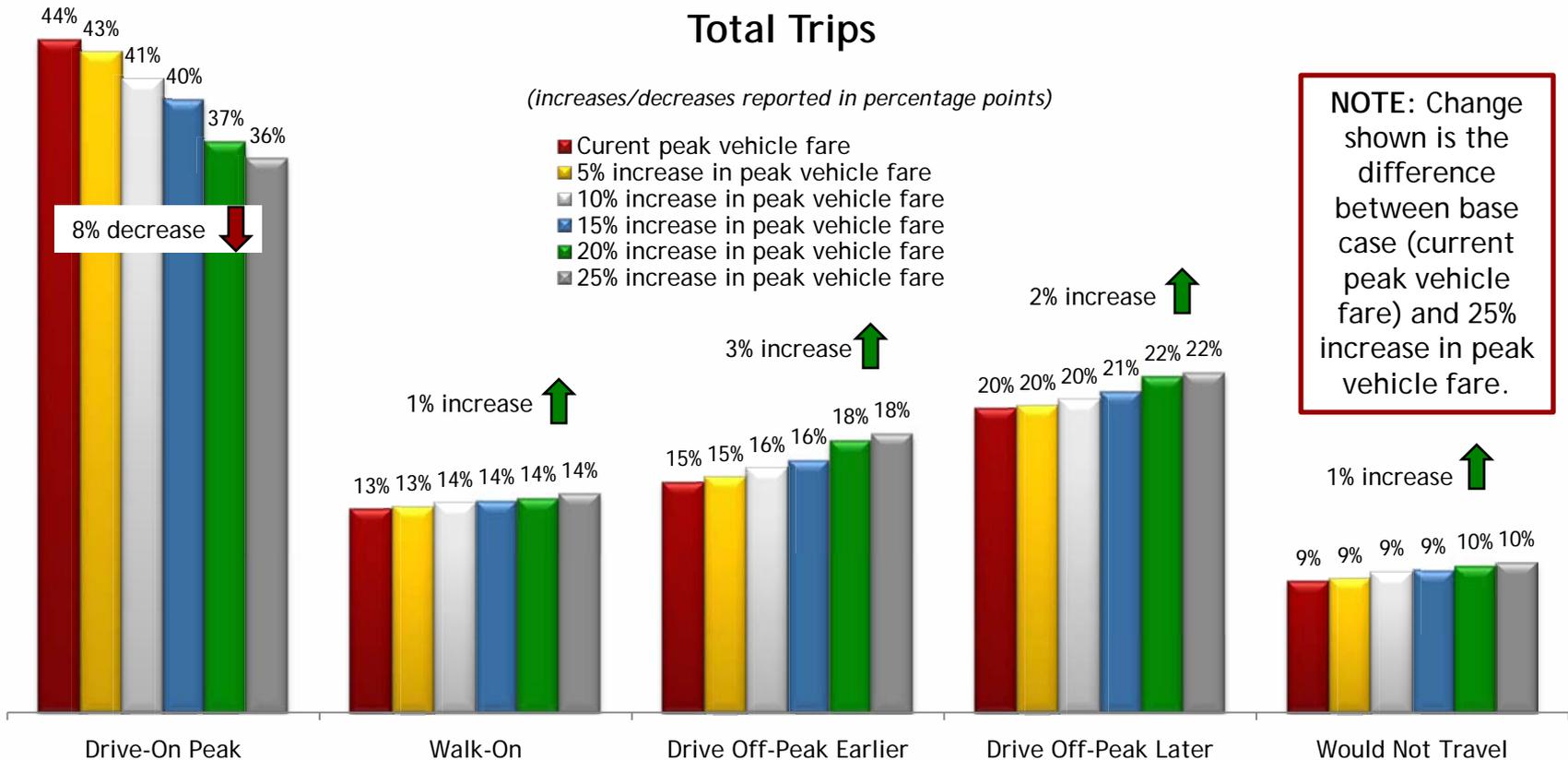
Simulator Result: *Increase in Only Peak Vehicle Fares*

- ❖ By increasing ONLY peak vehicle fares, there is an 8 percentage point decrease in peak period drive-on vehicle usage.
- ❖ There is a 5 percentage point increase in off-peak (either first boat before or after the peak period) drive-on behavior.
- ❖ There is little change in either the “would not travel” percentage or walk on at peak (1 percentage point increase each).

Total Trips

(increases/decreases reported in percentage points)

- Current peak vehicle fare
- 5% increase in peak vehicle fare
- 10% increase in peak vehicle fare
- 15% increase in peak vehicle fare
- 20% increase in peak vehicle fare
- 25% increase in peak vehicle fare

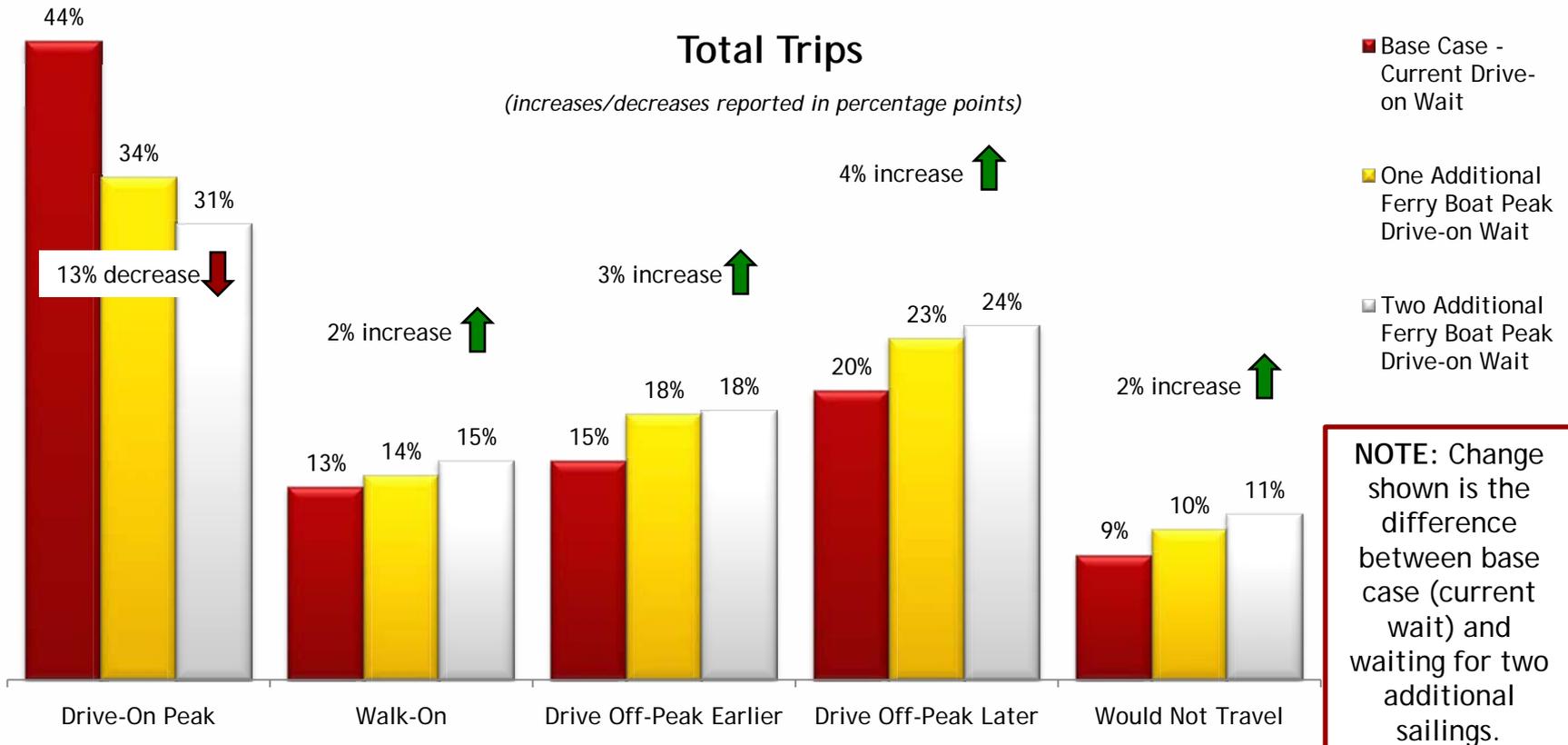


NOTE: Change shown is the difference between base case (current peak vehicle fare) and 25% increase in peak vehicle fare.



Simulator Result: *Increases in Wait Time for Peak Vehicle Drivers*

- ❖ More impactful than a 25% increase in fares is an additional one/two ferry boat wait for peak vehicle drivers.
 - By increasing the wait time to one or two sailings during peak hours, there could be a 10-13 percentage point decline in peak drive-on behavior with the majority switching to walk-on (2 percentage points) and off peak drive-on (7 percentage points either first boat before or after peak).
- ❖ This slide shows the relative importance of service (runs) over fares to peak vehicle drivers.



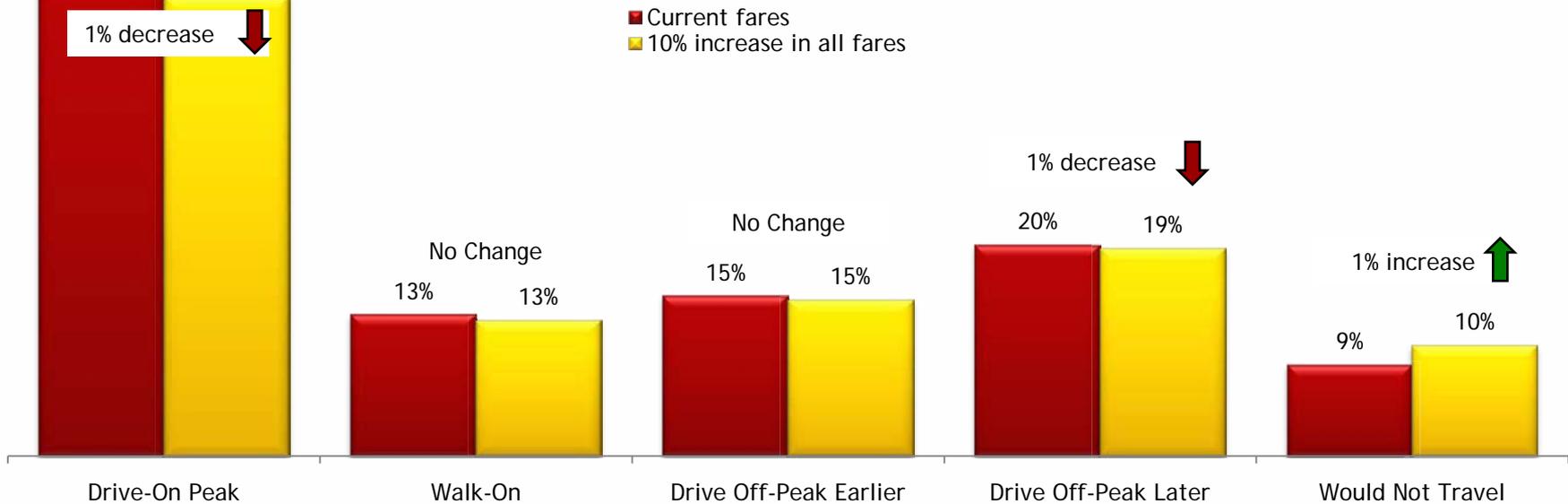


Simulator Result: 10% Across the Board Increase

- ❖ This simulation shows the results of enacting a 10% across the board increase.
- ❖ There is no real impact on mode shifting or overall ferry usage under a 10% across the board increase in fares.

TOTAL: 10% Across the Board Increase

(increases/decreases reported in percentage points)



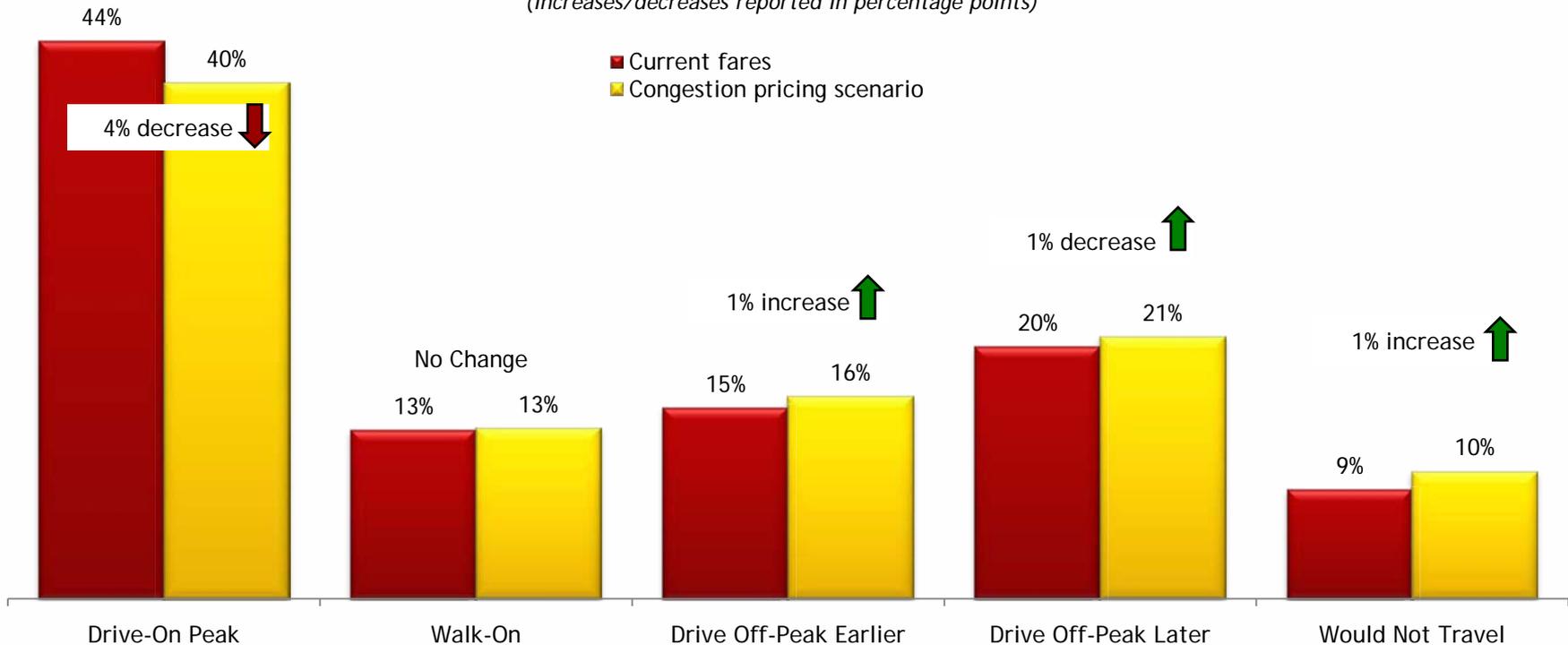


Simulator Result: 15% Peak Vehicle Fare Increase Coupled with a 5% Increase in Walk-on & Off-Peak Vehicle Fares

- ❖ This simulation shows the results of one congestion pricing option where peak vehicle fares are increased by 15% coupled with a 5% increase in walk-on fares (both peak and off peak) and a 5% increase in off-peak vehicle fares.
- ❖ Under this congestion pricing scenario, vehicle traffic at peak times would decline by 4 percentage points.
- ❖ There would be a 2 percentage point increase in off-peak vehicle travel under this congestion pricing scenario.
- ❖ This scenario would only see a 1 percentage point increase in the "would not travel" behavior.

TOTAL: 15% Peak Drive-on Increase/5% Off-Peak/Walk-on Increase

(increases/decreases reported in percentage points)





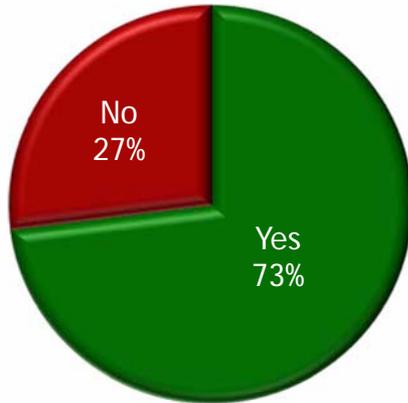
Tariffs & Surcharges



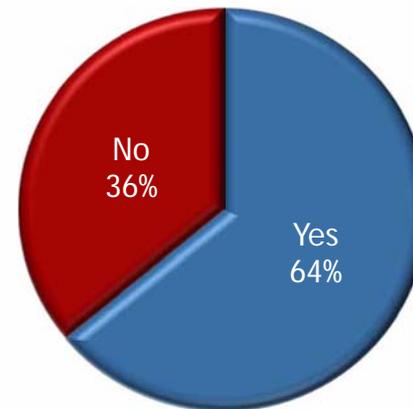
Support for Higher Single-Fare Pricing (Summer)

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

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



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



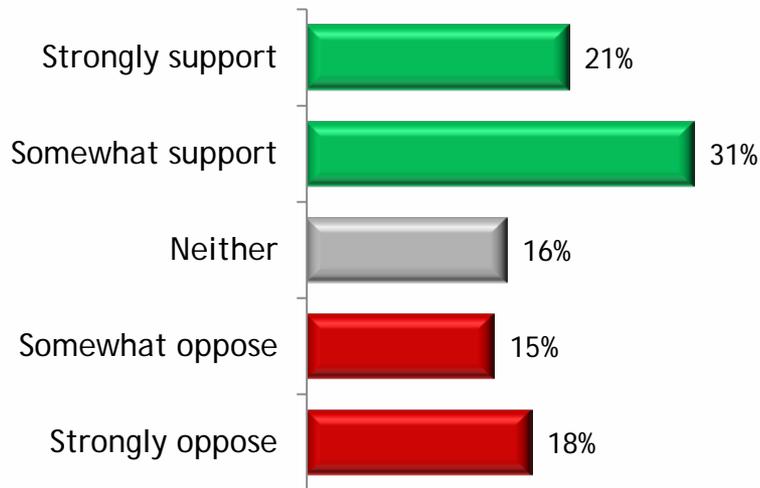
- N18 *As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider/multi-ride card holder, or not?*
- N19 *As a general policy, do you believe that single-fare tickets for a single trip should be priced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



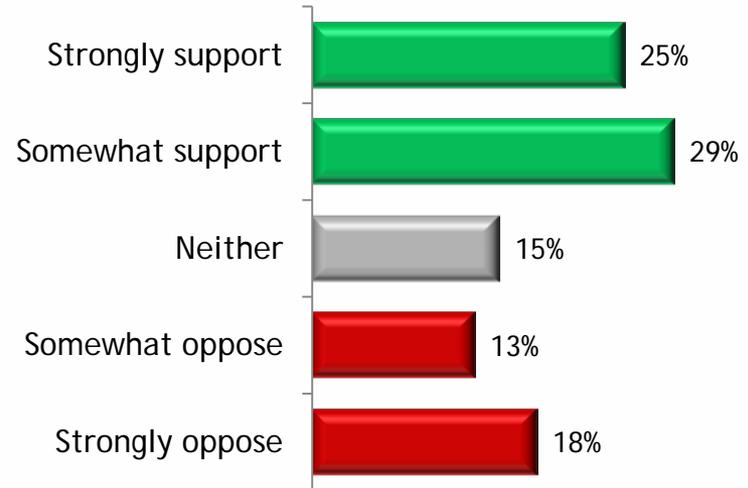
July/August Single-Fare Increase (Summer)

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

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



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



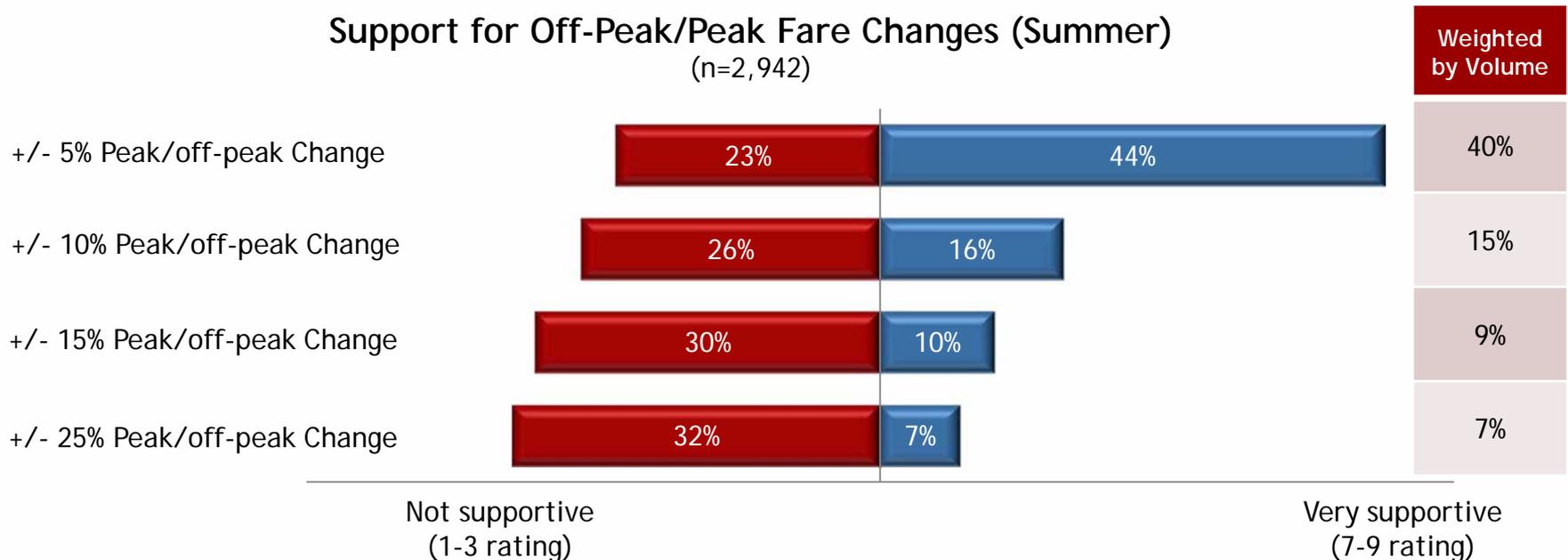
N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current Summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?



Support for Seasonal Congestion Pricing Changes

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

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



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 (Summer)

- ❖ 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

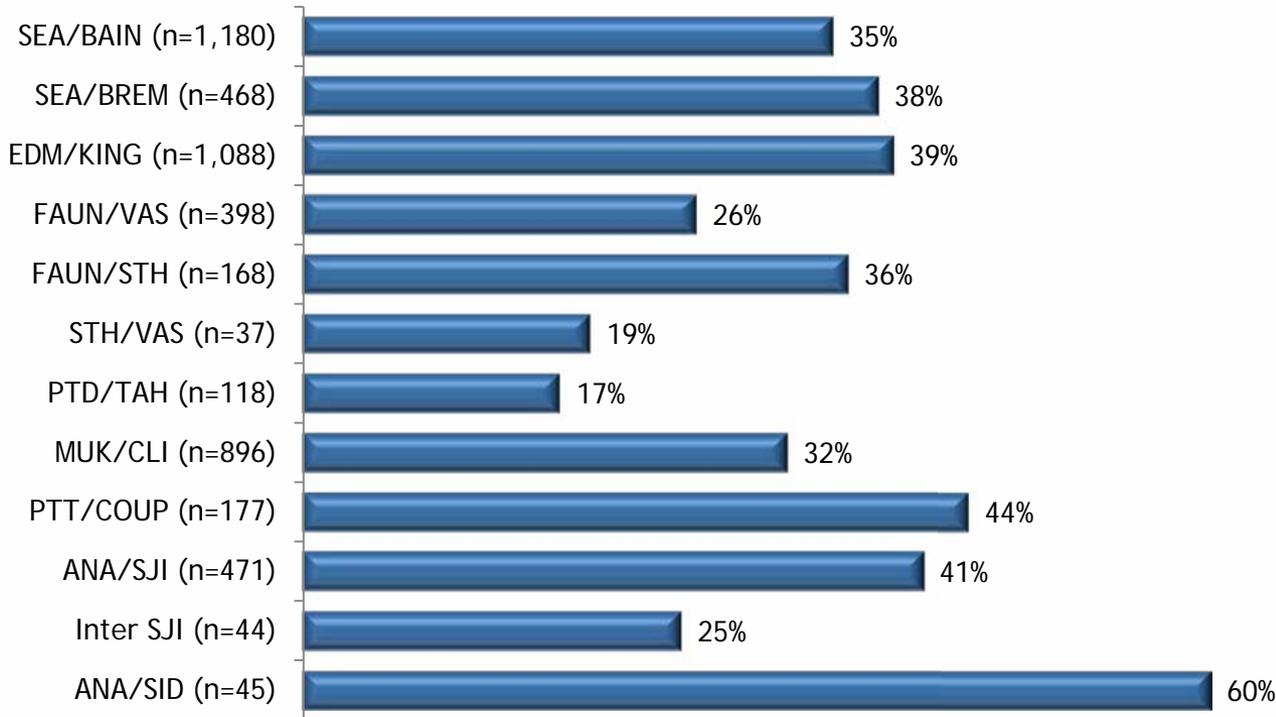
Q2 How might this option impact your peak Summer period vehicle travel (during the heaviest congested travel times) on the ferry if it was enacted?



Fuel Surcharge Support - By Route

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

Fuel Surcharge Support
(Top Box Ratings 4-5)



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

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



Fuel Surcharge Maximum & Implementation

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

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

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

**Differs due to weighting*

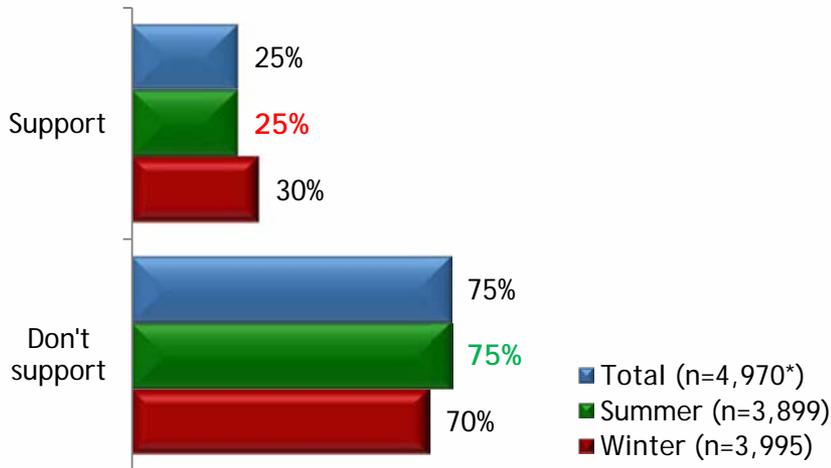
- Q4 Which of these do you feel would be the best way to set a maximum amount on the surcharge?
 Q5 Which of these do you feel would be the most appropriate way for the surcharge to be applied?



Higher Fares for Non-Residents

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

Higher Fares for Non-Residents



Support Given Extra Time Needed



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

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

*Differs due to weighting

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

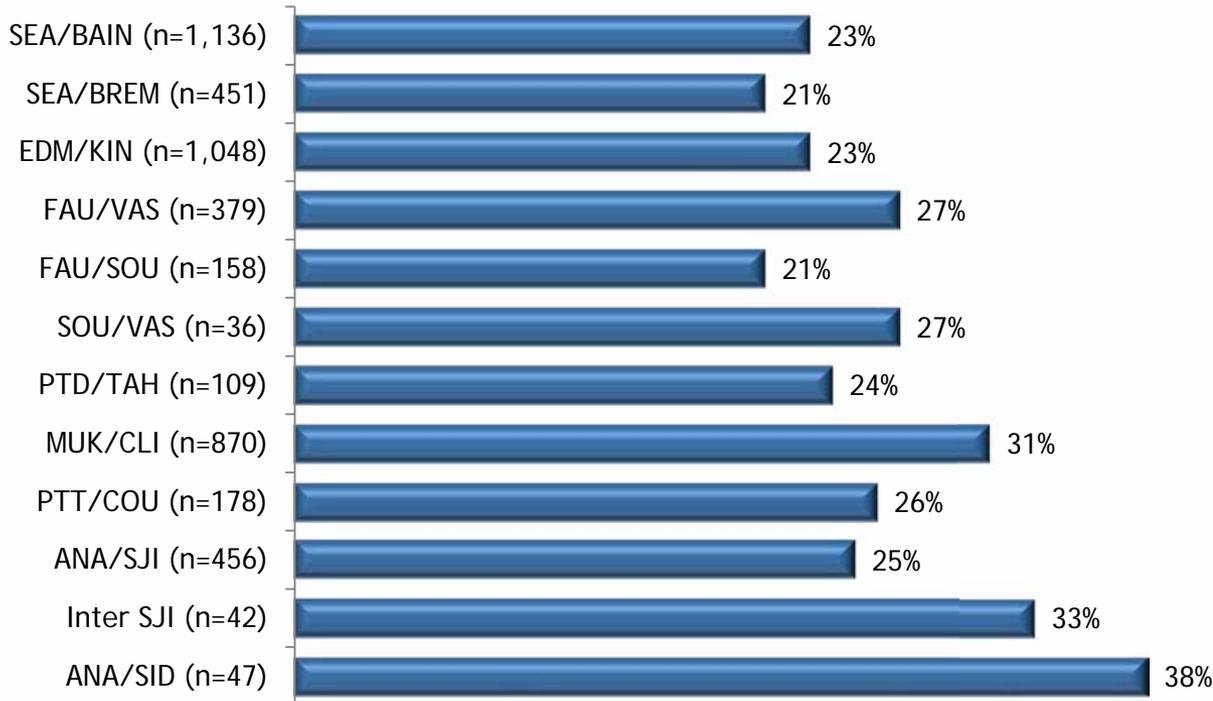
Q8 How supportive would you be of this type of program given that extra time could be needed to verify residency?



Higher Fares for Non-Residents - By Route

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

Support of Higher Fares for Non-Residents (Total)



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

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



Reservation System



Reservation Program - Support & Use (Summer)

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

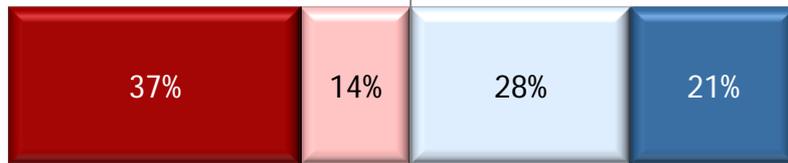
Reservation Program Support

(n=3,981)

Strongly Oppose

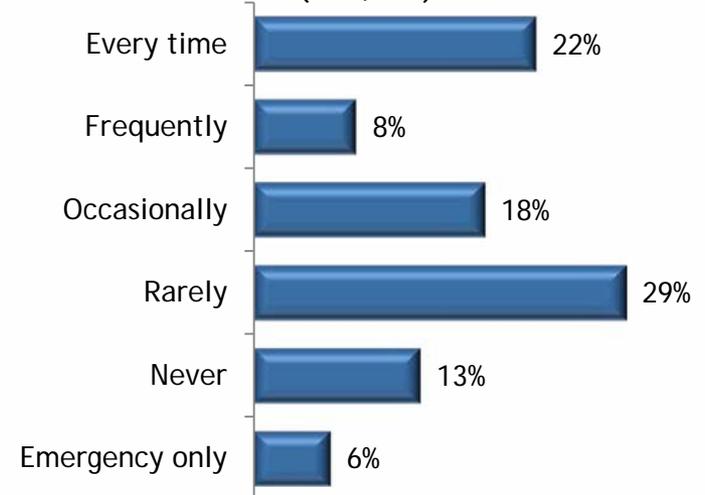


Strongly Favor



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?



Rider Characteristics & Demographic Information



Rider Satisfaction

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

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

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



Ridership Frequency

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

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

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

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



Demographics - Gender

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

* Caution: Small sample sizes

**Differs due to weighting

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



Demographics - Age

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

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

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