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CORPORATION

Capital Funding Study Summary Findings

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



Washington State
Transportation Commission

Conducted by
Market Decisions Corporation
December 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
- ❖ The focus of this report is the Capital Funding study.
 - A comprehensive report of all phases will be available January 2011.
 - Breakouts of all survey data by Legislative District will be available.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC ☎ (360) 705-7070.

Please [click here](#) for access to the full data cross tabulations for this study.



Methodology

- ❖ The following presents the findings for the 2010 Capital Funding survey. The main objective of this research is to understand the opinions of ferry riders regarding capital funding for the Washington State Ferries, with particular interest given to gauging ferry riders' knowledge of WSF's current capital funding situation and understanding their attitudes towards which taxes and other sources should be used for capital funding and which capital funding projects should be undertaken.
- ❖ Only those ferry riders who are members of FROG (Ferry Riders' Opinion Group) were asked to complete the online survey.
 - The survey was conducted between November 9, 2010 and November 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.
 - Any differences noted throughout the report are proven to be statistically different at the 95% confidence level or higher.
- ❖ The data were weighted by route in order to make the survey results proportionate to overall ferry ridership.
 - Information regarding specific weighting methods can be found at the end of this report.
- ❖ Significant differences between routes (only noted when significantly different from roughly half of all other routes/**at least 5 other routes**) are highlighted by a **blue outline**
- ❖ The information was analyzed by legislative districts, based on those districts with a statistically valid sample base (n=30+).
 - Significant differences between districts (only noted when significantly different from one third of all other statically valid districts/**at least 5 other districts** are highlighted by a **blue outline**.



Executive Summary

- ❖ Overall, there is a great deal of misunderstanding regarding the state of WSF capital funding.
 - Only 43% correctly identify the source of WSF daily operational costs and even fewer (30%) correctly identify the source of WSF capital funding.
 - 43% of riders believe that the remaining operational costs are covered by statewide gas taxes and 32% believe that coverage for WSF's capital needs comes from statewide gas taxes.
 - 24% believe capital funds are never diverted to cover operational costs and one third (33%) don't know for sure.
 - 34% believe the WSF has no spare boats, however, 15% say they have 1 spare boat and 17% say 2 spare boats.
 - 39% say the \$4 billion needed for capital funding is over-exaggerated; however, 35% believe that the quoted deficit is probably accurate.
- ❖ Seven in ten (71%) ferry riders feel that funding for WSF's capital needs is a major problem, with 30% believing it needs to be dealt with immediately and the balance stating that it needs to be addressed in the next 2-5 years.
 - Roughly three fourths (72%) of respondents agree that the existing ferries are in need of major repairs or replacements and 62% think WSF needs more boats.
 - Edmonds/Kingston and Port Townsend/Coupeville are the routes mentioned most frequently needing more boats (26% and 25%).
 - Seattle/Bainbridge, Mukilteo/Clinton and Edmonds/Kingston need enlarged and/or redesigned terminals for more efficient service (27%, 24% and 23%).



Executive Summary (cont.)

- ❖ Sixty percent (60%) support increasing the statewide gas tax to fund the capital needs of the ferries; 35% “completely support” such an increase. Forty-four percent support increased vehicle registration fees; 37% a new tax in Western Washington ferry served communities, and 33% a new statewide tax dedicated to funding ferry capital needs.
 - Increasing the statewide sales tax and introducing a fare surcharge to fund capital needs have the lowest support.
 - 45% of ferry riders would completely support charging an additional \$.10 per fare with the monies collected going into a dedicated fund for ferry capital improvements.
 - Support for changing the vehicle length surcharge threshold from over 20’ to over 14’ - 16’ is low, with 52%-60% rating their support at a 1 or 2 on a 7-point scale where “1” means “would not support at all” and “7” means “would completely support.”
- ❖ When asked to distribute the cost of capital funding among different sources, respondents believe the \$.40 of each capital funding dollar should come from an increase in statewide taxes, such as gas or sales tax; \$.17 should come from local taxes in ferry served communities, \$.15 from increased rider fares, \$.09 from lower operating costs through service cuts and \$.19 from miscellaneous other revenue or cost reduction sources.
- ❖ Three fourths (62%) of ferry riders support increasing the fare coverage of operational costs to free up money for capital projects - 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); however, 38% do not support any increase above the current 65% recovery rate.
 - Those who support higher coverage of operating costs from fares feel fares should increase about 4% annually, on average.



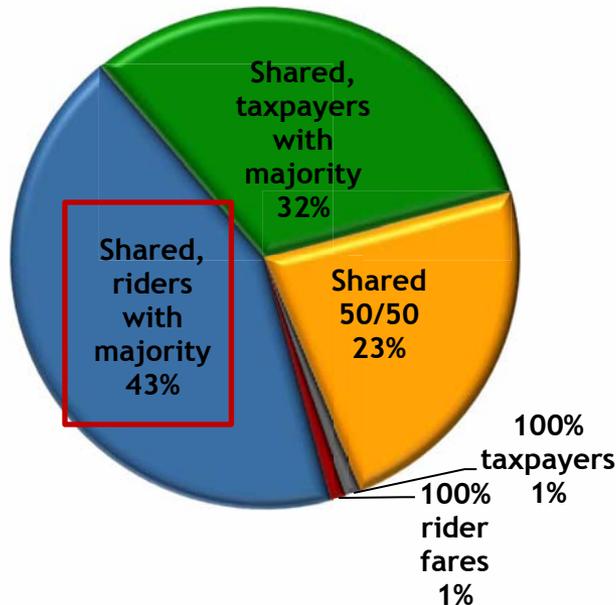
Detailed Findings



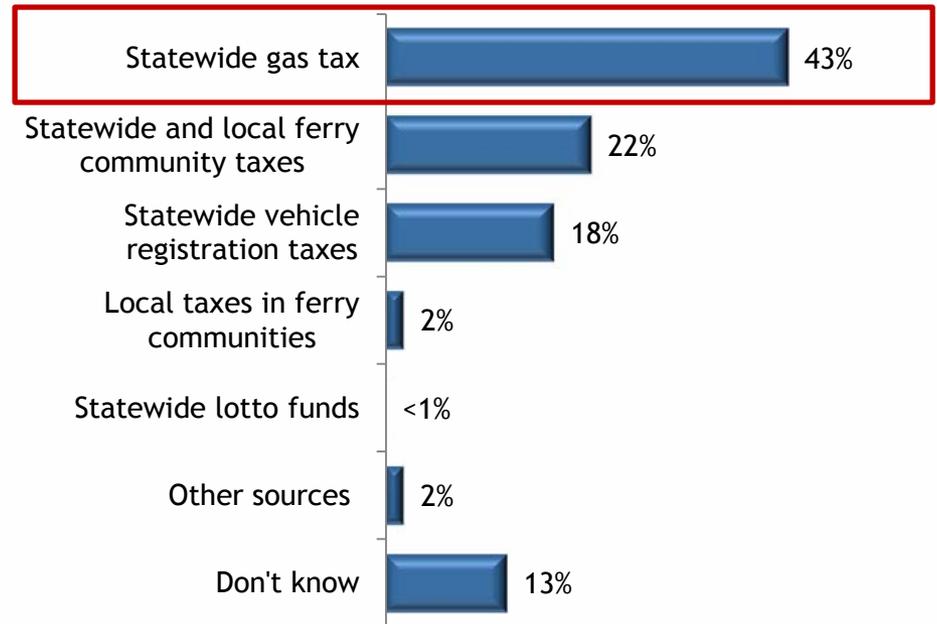
Current Sources of Operational Funding

- ❖ Only 43% correctly identified the source of WSF funding for daily operations.
- ❖ 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 Operational Funding - By Route

Sources of Operational Funding <small>Differences by route are not significant.</small>	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*
100% taxpayer	1%	<1%	1%	1%	1%	0%	0%	1%	0%	1%	1%
Shared, taxpayers with majority	31%	34%	33%	33%	38%	44%	29%	28%	34%	31%	36%
Shared 50/50	23%	16%	23%	20%	17%	22%	23%	26%	30%	29%	30%
Shared, riders with majority	44%	47%	40%	46%	45%	33%	48%	42%	34%	38%	33%
100% rider fares	1%	2%	3%	0%	0%	0%	0%	2%	2%	1%	0%

Sources of the 35% of Operating Costs Not Covered by Fares	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*
Statewide gas tax	38%	33%	50%	38%	42%	33%	42%	48%	51%	46%	42%
Statewide and local ferry community taxes	25%	30%	19%	28%	23%	22%	27%	17%	17%	14%	20%
Statewide vehicle registration taxes	21%	17%	15%	19%	11%	11%	13%	17%	15%	26%	20%
Local taxes in ferry communities	2%	4%	2%	1%	3%	0%	0%	1%	4%	3%	0%
Statewide lotto funds	<1%	0%	1%	0%	1%	0%	0%	<1%	0%	0%	0%
Other sources	2%	1%	2%	0%	4%	0%	0%	3%	2%	1%	1%
Don't know	12%	15%	10%	15%	17%	33%	17%	15%	11%	11%	17%

* Caution: Small sample sizes



Current Sources of Operational Funding - By District

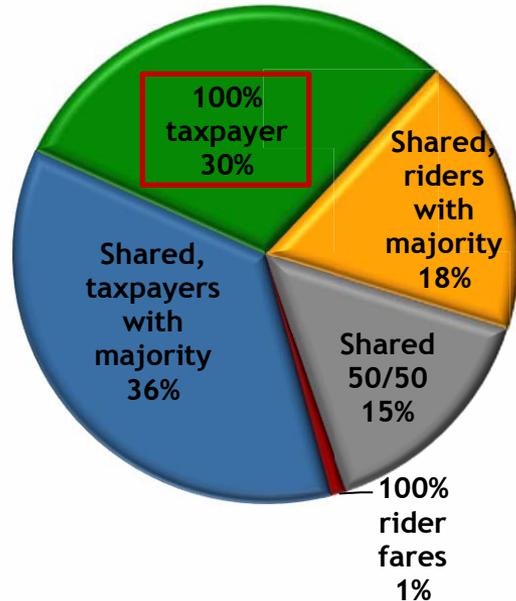
Sources of Operational Funding	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
100% taxpayer	0%	1%	4%	0%	1%	1%	0%	0%	1%	0%	2%	0%	1%	2%	0%
Shared, taxpayers with majority	24%	28%	56%	21%	29%	39%	38%	39%	31%	32%	48%	35%	33%	37%	45%
Shared 50/50	35%	26%	6%	35%	21%	30%	17%	40%	18%	18%	14%	10%	29%	21%	25%
Shared, riders with majority	41%	43%	33%	44%	48%	29%	44%	21%	49%	49%	32%	55%	36%	38%	27%
100% rider fares	0%	2%	0%	0%	2%	1%	1%	0%	0%	1%	3%	0%	1%	2%	2%
Sources of the 35% of Operating Costs Not Covered by Fares	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Statewide gas tax	41%	51%	25%	42%	38%	49%	37%	56%	36%	41%	44%	41%	41%	32%	39%
Statewide and local ferry community taxes	25%	16%	15%	19%	26%	17%	27%	17%	29%	26%	31%	26%	14%	25%	16%
Statewide vehicle registration taxes	18%	16%	36%	17%	20%	16%	17%	9%	17%	16%	7%	12%	28%	19%	27%
Local taxes in ferry communities	3%	1%	0%	4%	3%	2%	2%	7%	1%	3%	5%	0%	3%	2%	2%
Statewide lotto funds	0%	<1%	2%	0%	<1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other sources	1%	2%	0%	2%	3%	1%	2%	2%	0%	2%	0%	0%	1%	1%	2%
Don't know	13%	14%	22%	16%	10%	14%	15%	9%	16%	11%	13%	21%	13%	21%	14%



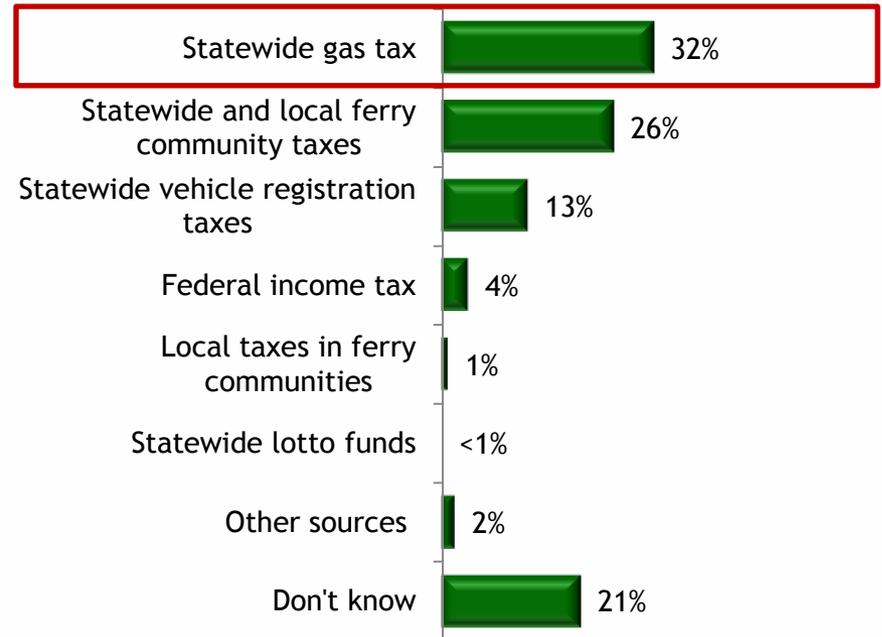
Current Sources of Capital Funding

- ❖ Roughly one third (30%) correctly identify taxpayers as the source of 100% of WSF capital funding.
- ❖ 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?



Current Sources of Capital Funding - By Route

Sources of Capital Funding	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*
100% taxpayer	29%	24%	37%	38%	31%	33%	31%	29%	21%	26%	28%
Shared, taxpayers with majority	38%	33%	33%	30%	36%	33%	33%	34%	43%	43%	43%
Shared 50/50	14%	16%	12%	16%	13%	22%	19%	16%	21%	14%	11%
Shared, riders with majority	18%	26%	17%	15%	19%	11%	17%	20%	11%	17%	17%
100% rider fares	1%	2%	1%	1%	1%	0%	0%	<1%	4%	0%	1%
Coverage WSF Capital Needs	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*
Statewide gas tax	29%	27%	40%	28%	33%	11%	27%	38%	32%	28%	32%
Statewide and local ferry community taxes	30%	32%	21%	34%	25%	44%	31%	20%	15%	24%	27%
Statewide vehicle registration taxes	13%	14%	10%	16%	12%	11%	12%	10%	17%	16%	18%
Federal income tax	6%	5%	3%	3%	2%	0%	4%	5%	8%	3%	1%
Local taxes in ferry communities	1%	1%	2%	1%	1%	0%	0%	1%	2%	1%	0%
Statewide lotto funds	1%	0%	<1%	0%	1%	0%	0%	<1%	0%	1%	0%
Other sources	2%	1%	3%	0%	1%	0%	0%	4%	4%	1%	3%
Don't know	19%	20%	20%	19%	26%	33%	27%	23%	23%	25%	18%

* Caution: Small sample sizes



Current Sources of Capital Funding - By District

Sources of Capital Funding	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
100% taxpayer	17%	29%	32%	21%	31%	34%	26%	30%	37%	26%	29%	25%	27%	29%	30%
Shared, taxpayers with majority	32%	34%	42%	31%	34%	37%	36%	25%	32%	33%	41%	41%	44%	40%	45%
Shared 50/50	24%	17%	6%	21%	14%	12%	15%	24%	15%	16%	8%	14%	14%	12%	9%
Shared, riders with majority	27%	20%	21%	27%	20%	16%	21%	18%	15%	24%	19%	21%	15%	16%	14%
100% rider fares	0%	1%	0%	0%	1%	2%	1%	3%	1%	1%	4%	0%	<1%	3%	2%

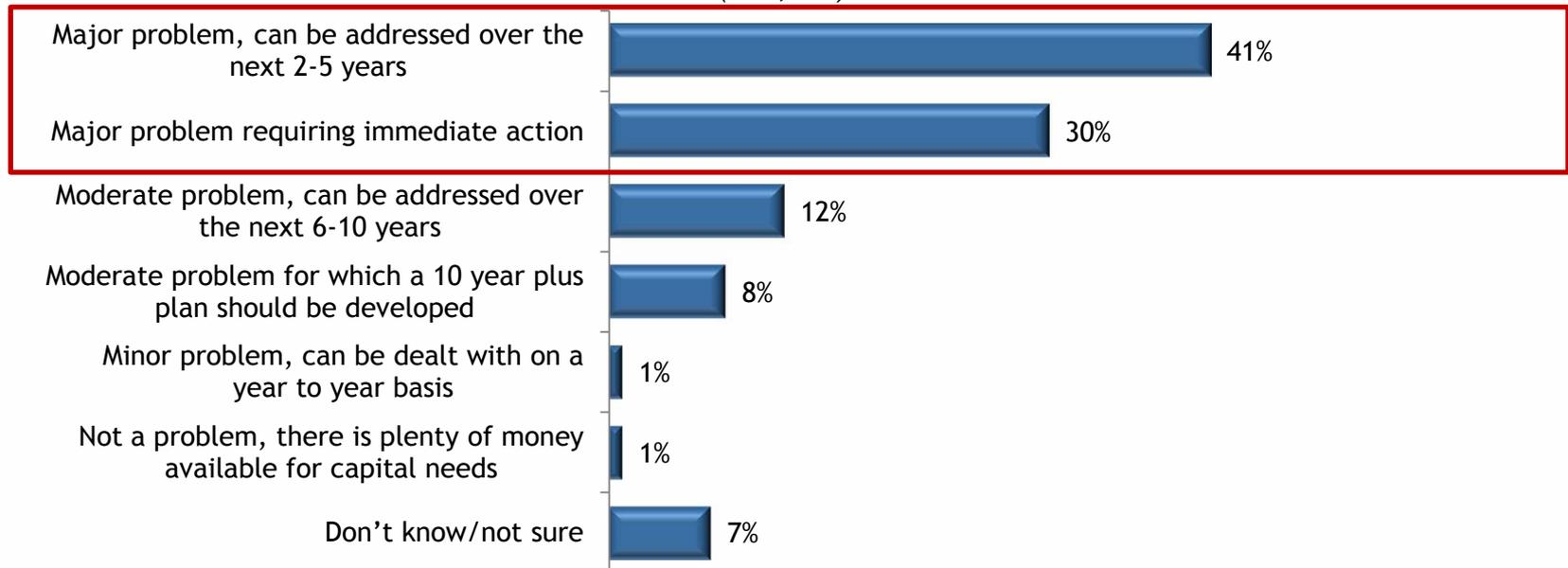
Coverage WSF Capital Needs	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Statewide gas tax	39%	37%	16%	42%	30%	38%	27%	54%	26%	31%	39%	29%	26%	26%	27%
Statewide and local ferry community taxes	18%	18%	35%	6%	29%	21%	33%	19%	34%	31%	30%	36%	25%	28%	27%
Statewide vehicle registration taxes	17%	10%	19%	17%	13%	8%	15%	10%	13%	14%	5%	10%	20%	13%	18%
Federal income tax	0%	5%	0%	0%	5%	6%	4%	0%	3%	4%	3%	0%	4%	6%	5%
Local taxes in ferry communities	3%	1%	0%	4%	2%	2%	<1%	3%	1%	1%	3%	0%	1%	3%	0%
Statewide lotto funds	0%	<1%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Other sources	0%	4%	0%	2%	3%	2%	2%	2%	0%	1%	1%	0%	<1%	1%	2%
Don't know	23%	24%	28%	29%	18%	24%	19%	12%	23%	17%	17%	25%	24%	23%	20%



Capital Funding Problem

- ❖ Nearly three fourths (71%) of ferry riders 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?



Capital Funding Problem - By Route

- ❖ Riders on all routes consistently agree that funding for WSF's capital needs is a **major problem**, which needs to be addressed within the **next 5 years**.
 - There are no significant differences between routes.

Capital Funding Problem	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*
Major problem requiring immediate action	24%	36%	25%	33%	31%	22%	29%	37%	32%	37%	37%
Major problem, can be addressed over the next 2-5 years	45%	36%	39%	40%	43%	67%	35%	38%	43%	41%	39%
Moderate problem, can be addressed over the next 6-10 years	14%	9%	15%	12%	15%	11%	12%	13%	4%	8%	10%
Moderate problem for which a 10 year plus plan should be developed	9%	6%	11%	11%	5%	0%	12%	5%	8%	7%	8%
Minor problem, can be dealt with on a year to year basis	1%	3%	1%	1%	0%	0%	0%	0%	4%	1%	0%
Not a problem, there is plenty of money available for capital needs	1%	<1%	2%	0%	0%	0%	0%	1%	2%	1%	1%
Don't know/not sure	7%	9%	7%	4%	6%	0%	13%	5%	8%	6%	6%

* Caution: Small sample sizes



Capital Funding Problem - By District

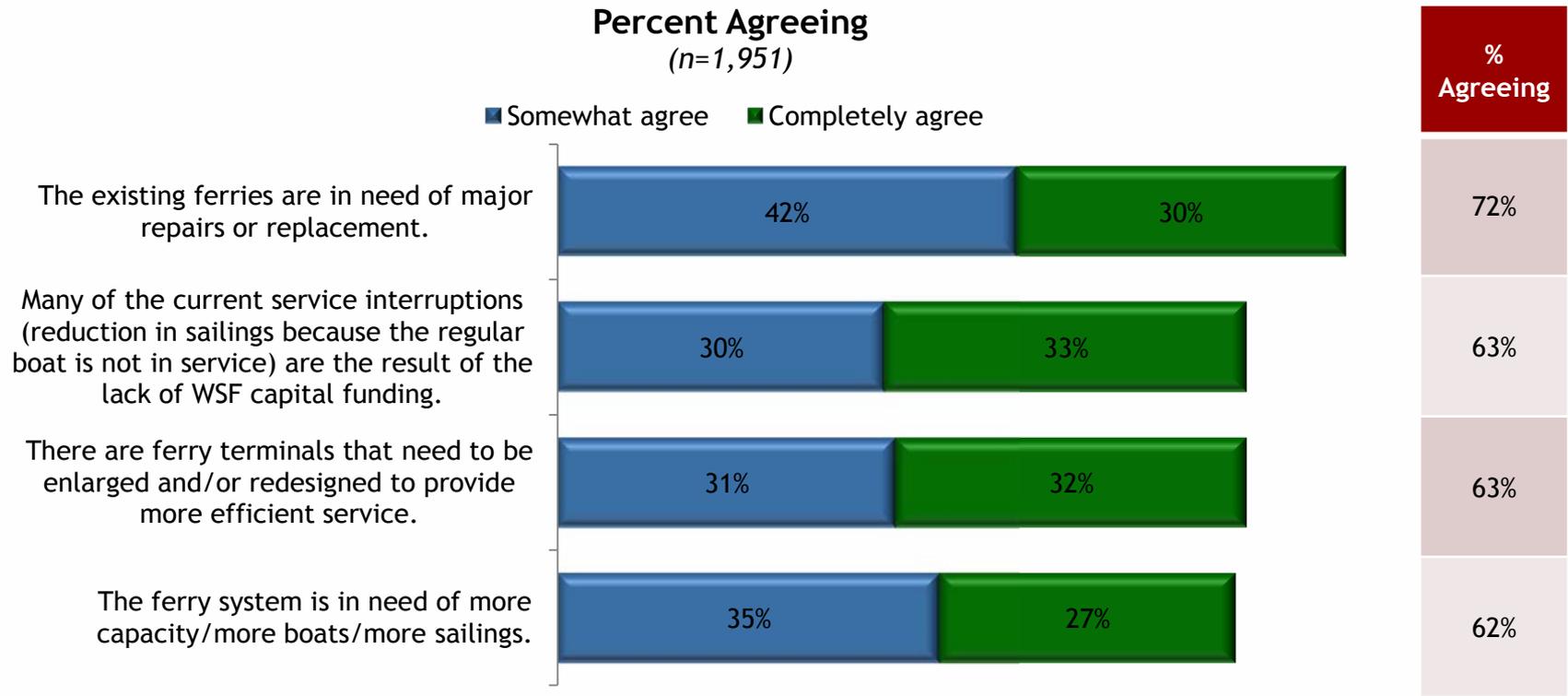
- ❖ Riders living in the Northern legislative districts (districts 10 and 40) are significantly more likely to state that the WSF's capital funding needs are a major problem that requires immediate attention.
 - Those living in Western districts (districts 23, 24, 26 and 35) are also more likely, although not significantly, to state capital funding is a major issue.

Capital Funding Problem	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Major problem requiring immediate action	18%	39%	10%	27%	29%	23%	34%	23%	30%	34%	23%	23%	37%	23%	16%
Major problem, can be addressed over the next 2-5 years	43%	37%	53%	38%	41%	48%	37%	46%	41%	36%	40%	45%	41%	43%	48%
Moderate problem, can be addressed over the next 6-10 years	16%	10%	15%	14%	13%	14%	13%	8%	11%	13%	10%	11%	9%	12%	23%
Moderate problem for which a 10 year plus plan should be developed	11%	5%	9%	15%	8%	9%	6%	15%	11%	7%	14%	8%	5%	5%	5%
Minor problem, can be dealt with on a year to year basis	0%	1%	0%	0%	2%	1%	1%	0%	1%	2%	2%	0%	1%	4%	2%
Not a problem, there is plenty of money available for capital needs	1%	1%	0%	2%	2%	1%	0%	0%	0%	<1%	0%	0%	1%	0%	0%
Don't know/not sure	11%	6%	13%	4%	6%	4%	8%	9%	6%	8%	12%	14%	6%	13%	7%



Current Vessel & Terminal Needs

- ❖ Roughly three fourths (72%) of respondents agree that the existing ferries are in need of major repair or replacement and 62% think WSF needs more boats.



C4 How much do you agree or disagree with each of the following statements?



Current Vessel/Terminal Needs - By Route

- ❖ Riders of the Seattle/Bremerton, Mukilteo/Clinton and Anacortes/Friday Harbor routes are significantly more likely to agree that the existing ferries are in need of major repairs or replacement.
- ❖ Riders of the Fauntleroy/Southworth and Mukilteo/Clinton are significantly more likely to agree that there are ferry terminals that need to be enlarged and/or redesigned to be more efficient.

Percent Agreeing (Somewhat & Completely)	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*
The existing ferries are in need of major repairs or replacement.	64%	85%	65%	62%	76%	56%	75%	80%	68%	88%	82%
Many of the current service interruptions (reduction in sailings because the regular boat is not in service) are the result of the lack of WSF capital funding.	57%	66%	55%	67%	65%	89%	67%	69%	64%	70%	66%
There are ferry terminals that need to be enlarged and/or redesigned to provide more efficient service.	64%	45%	64%	56%	78%	67%	58%	77%	51%	59%	50%
The ferry system is in need of more capacity/more boats/more sailings.	52%	62%	63%	65%	74%	78%	62%	67%	68%	71%	63%

* Caution: Small sample sizes



Current Vessel/Terminal Needs - By District

- ❖ Ferry riders residing in Northern and Western legislative districts are more likely to agree that the ferry system needs improvements, such as the current ferries are in need of repairs or replacement, current system needs more boats, capacity and/or sailings and many of the current service interruptions are the result of the lack of WSF capital funding.

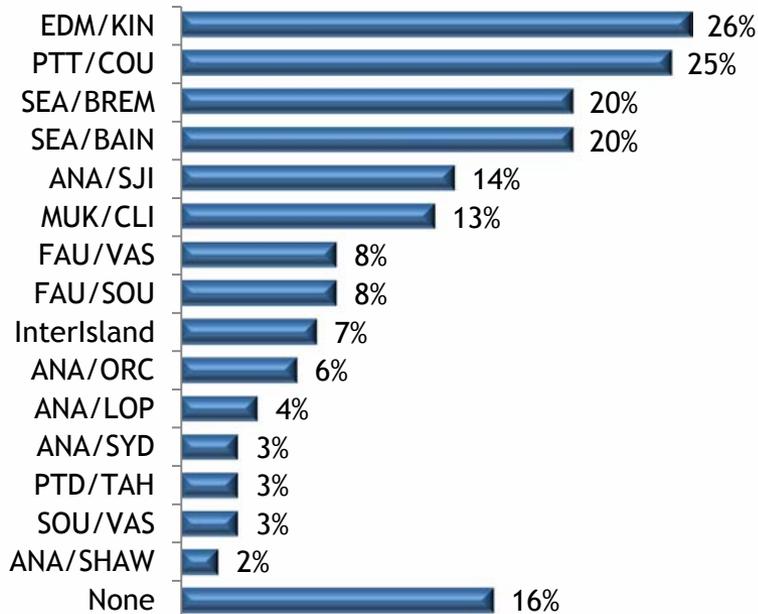
Percent Agreeing (Somewhat & Completely)	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
The existing ferries are in need of major repairs or replacement.	70%	82%	71%	69%	67%	65%	84%	73%	66%	84%	71%	73%	86%	72%	80%
Many of the current service interruptions (reduction in sailings because the regular boat is not in service) are the result of the lack of WSF capital funding.	47%	71%	59%	48%	56%	66%	67%	47%	67%	65%	63%	69%	70%	59%	57%
There are ferry terminals that need to be enlarged and/or redesigned to provide more efficient service.	66%	75%	45%	67%	63%	61%	62%	69%	58%	56%	62%	58%	55%	58%	61%
The ferry system is in need of more capacity/more boats/more sailings.	58%	70%	39%	54%	56%	65%	74%	67%	64%	68%	65%	52%	68%	58%	48%



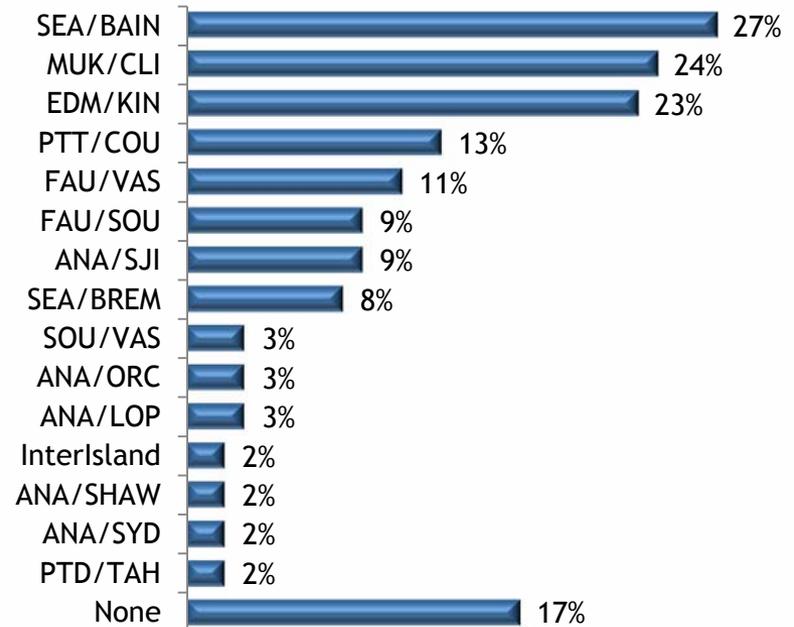
Routes Needing More Boats/ Improved Terminals

- ❖ The routes most often identified as needing more boats are **Edmonds/Kingston** (27% of riders) and **Port Townsend/Coupeville** (25%).
- ❖ The routes most often named as needing enlarged and/or redesigned terminals are **Seattle/Bainbridge** (27%), **Mukilteo/Clinton** (24%), and **Edmonds/Kingston** (23%).

Routes Needing More Boats (n=1,213)



Routes Needing Terminal Work (n=1,231)



C5 What specific routes, if any, do you feel need more boats?

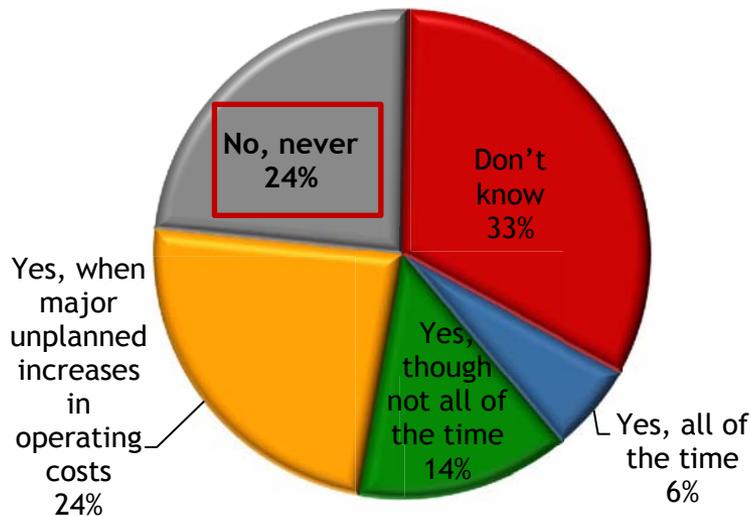
C6 What specific routes, if any, do you feel need enlarged and/or redesigned terminals to provide more efficient service?



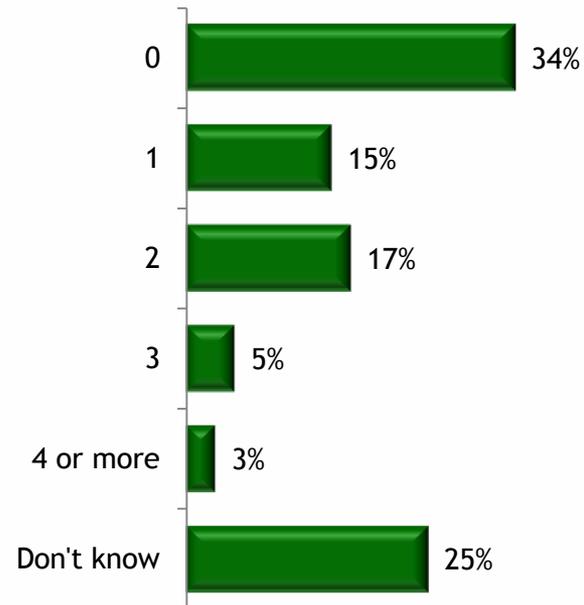
Diverted Funds & Spare Boats

- ❖ One quarter (24%) believe capital funds are never diverted to cover operational costs ; while one third (33%) don't know for sure.
- ❖ One third (34%) of riders believe the WSF has no spare boats and one quarter (25%) don't know.

Are Capital Funds Diverted to Cover Operational Costs?
(n=1,951)



Spare WSF Boats in Fleet
(n=1,951)



- C7 Do you think funds for ferry capital funding are ever diverted to cover operating costs (such as fuel, wages, and the day-to-day general maintenance of the boats and terminals)?
- C8 How many, if any, spare boats do you think WSF has in the fleet to use when a primary boat goes in for service or is down for any reason?



Diverted Funds & Spare Boats - By Route

- Riders of the Seattle/Bremerton and Mukilteo/Clinton routes are more likely to believe that capital funds are diverted to cover operating costs.

Capital Funds Diverted to Cover Operational Costs	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*
Yes, all of the time	5%	10%	7%	2%	6%	0%	2%	6%	6%	3%	3%
Yes, though not all of the time	11%	19%	10%	13%	14%	0%	17%	19%	11%	15%	14%
Yes, when major unplanned increases in operating costs	25%	20%	25%	28%	28%	22%	21%	19%	21%	27%	30%
No, never	28%	21%	26%	28%	17%	33%	15%	22%	26%	19%	14%
Don't know	32%	30%	32%	29%	36%	44%	44%	33%	36%	36%	39%

Spare WSF Boats in Fleet	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*
0	29%	47%	32%	38%	34%	33%	38%	33%	38%	38%	39%
1	14%	16%	14%	19%	18%	22%	19%	14%	11%	18%	21%
2	18%	14%	18%	19%	17%	33%	15%	19%	11%	17%	12%
3	6%	1%	4%	6%	6%	0%	6%	5%	8%	2%	4%
4 or more	5%	0%	4%	2%	2%	0%	0%	2%	8%	1%	1%
Don't know	28%	21%	28%	16%	23%	11%	21%	27%	25%	24%	23%

* Caution: Small sample sizes

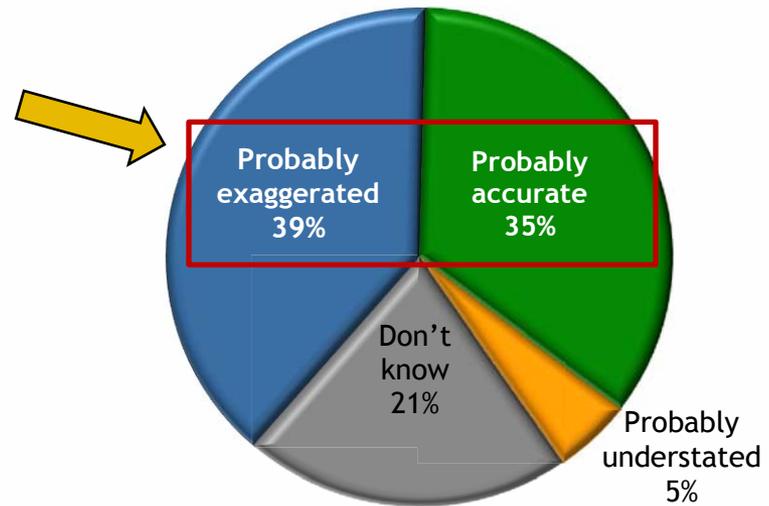


Public Opinion of WSF Capital Funding Need

Public Opinion of WSF Capital Funding Need
(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...



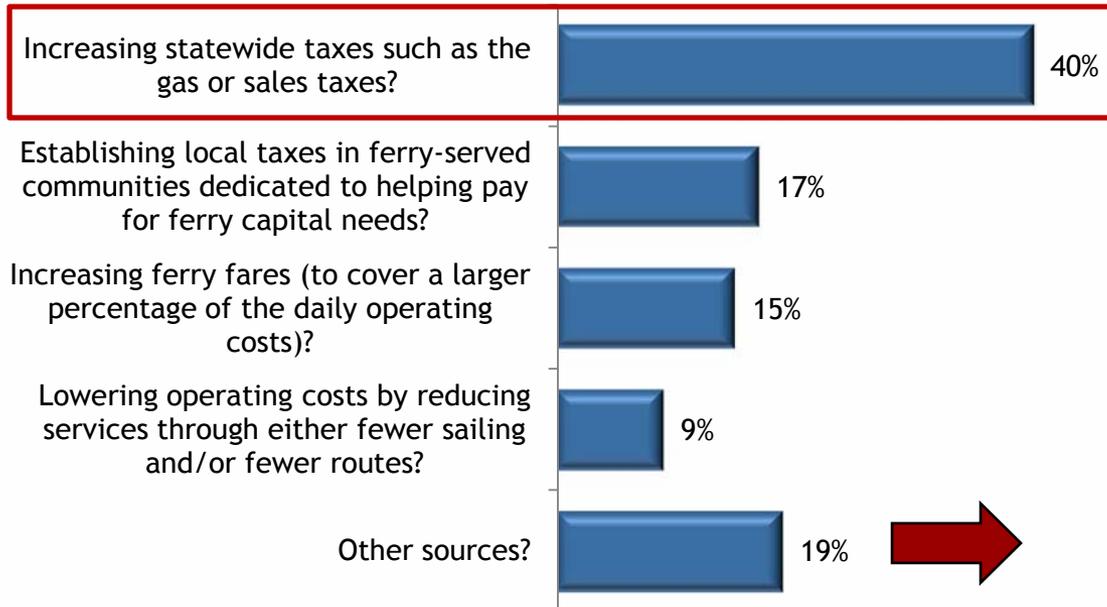
Public Opinion of WSF Capital Funding Need	SEA/ BAIN n=510	SEA/ BREM n=215	EDM/ KIN n=361	FAU/ VAS n=163	FAU/ SOU n=68	SOU/ VAS n=15*	PTD/ TAH n=55	MUK/ CLI n=335	PTT/ COU n=51	ANA/ FRI n=164	INTR SJI n=14*
Probably exaggerated	39%	39%	41%	35%	35%	44%	46%	38%	28%	39%	40%
Probably accurate	37%	33%	32%	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%



Alternative Revenue Sources

- ❖ When asked to distribute the cost of capital funding among different sources, respondents believe that 40% (or \$.40 of each capital funding dollar) should come from an **increase in statewide taxes, such as gas or sales tax**.
 - Additionally, riders feel 17% of capital funding cost should come from local taxes in ferry served communities, 15% from increased rider fares, 9% from lower operating costs through service cuts and 19% from miscellaneous other revenue or cost reduction sources.

What Percent of Total Funding Should Come From... (n=1,951)



Other Top Suggested Revenue Sources (Percentages below are based on 960 riders who in C10 said "other")

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?



Alternative Revenue Sources - By Route

- ❖ Respondents on the Fautleroy/Vashon, Point Defiance and Anacortes/Friday Harbor routes are more apt to believe a higher percentage of total capital funding needs should come from an increase in statewide taxes, such as gas or sales tax.

Percent Total Funding from Alternative Revenue Sources	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*
Increasing statewide taxes such as the gas or sales taxes	41%	31%	36%	46%	35%	40%	47%	41%	44%	46%	46%
Establishing local taxes in ferry-served communities dedicated to helping pay for ferry capital needs	18%	19%	16%	21%	18%	9%	19%	15%	14%	13%	15%
Increasing ferry fares (to cover a larger percentage of the daily operating costs)	15%	17%	16%	12%	16%	9%	9%	17%	16%	11%	14%
Lowering operating costs by reducing services through either fewer sailing and/or fewer routes	10%	11%	10%	6%	9%	8%	5%	9%	11%	7%	8%
Other	16%	22%	21%	16%	21%	34%	19%	20%	14%	22%	17%

* Caution: Small sample sizes



Alternative Revenue Sources - By District

❖ Residents in district 40 and district 34 believe that nearly half (46%) of the total capital funding needs should come from increasing statewide taxes such as the gas or sales taxes.

Percent Total Funding from Alternative Revenue Sources	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Increasing statewide taxes such as the gas or sales taxes	27%	41%	25%	25%	40%	40%	33%	32%	46%	32%	35%	31%	46%	36%	37%
Establishing local taxes in ferry-served communities dedicated to helping pay for ferry capital needs	18%	15%	30%	21%	17%	13%	19%	18%	21%	19%	18%	16%	12%	24%	25%
Increasing ferry fares (to cover a larger percentage of the daily operating costs)	27%	16%	24%	27%	13%	17%	15%	24%	11%	15%	21%	29%	11%	21%	18%
Lowering operating costs by reducing services through either fewer sailing and/or fewer routes	10%	9%	15%	11%	10%	9%	9%	9%	7%	10%	10%	12%	7%	9%	9%
Other	17%	20%	6%	14%	19%	20%	25%	15%	16%	24%	16%	12%	23%	10%	11%



Other Top Suggested Revenue Sources - By Route

- ❖ Across all routes, the top suggested other revenue sources (among those respondents suggesting additional sources; 19% of total) entail making changes to WSF administration, such as improving spending, reducing benefits and wages and reducing WSF staff.
- ❖ Fauntleroy/Vashon and Seattle/Bremerton riders have the highest other revenue source support for garnering additional capital funding revenue via advertising and corporate sponsorship.

Other Top Suggested Revenue Sources (Percentages are based on 960 riders who in C10 said "other")	SEA/ BAIN n=228	SEA/ BREM n=113	EDM/ KIN n=183	FAU/ VAS n=79	FAU/ SOU n=33	SOU/ VAS n=8*	PTD/ TAH n=31	MUK/ CLI n=164	PTT/ COU n=22*	ANA/ FRI n=93	INTR SJI N=6*
Improve WSF administrative & management spending	12%	22%	21%	16%	23%	20%	24%	21%	13%	12%	14%
Transportation funding	18%	15%	12%	14%	11%	20%	21%	16%	22%	23%	23%
Federal funding	15%	7%	6%	10%	8%	0%	10%	12%	17%	8%	12%
Reduce WSF employee benefits & wages	4%	11%	13%	9%	9%	20%	17%	14%	17%	3%	11%
WSF staff reductions	4%	8%	8%	9%	13%	40%	17%	7%	4%	6%	9%
Lottery/gambling funding	4%	6%	10%	7%	9%	0%	3%	9%	13%	9%	6%
Advertising & corporate sponsorship	11%	6%	2%	9%	15%	0%	3%	4%	9%	8%	9%
Vehicle licensing & registration fees	8%	3%	5%	7%	9%	20%	7%	4%	4%	6%	9%

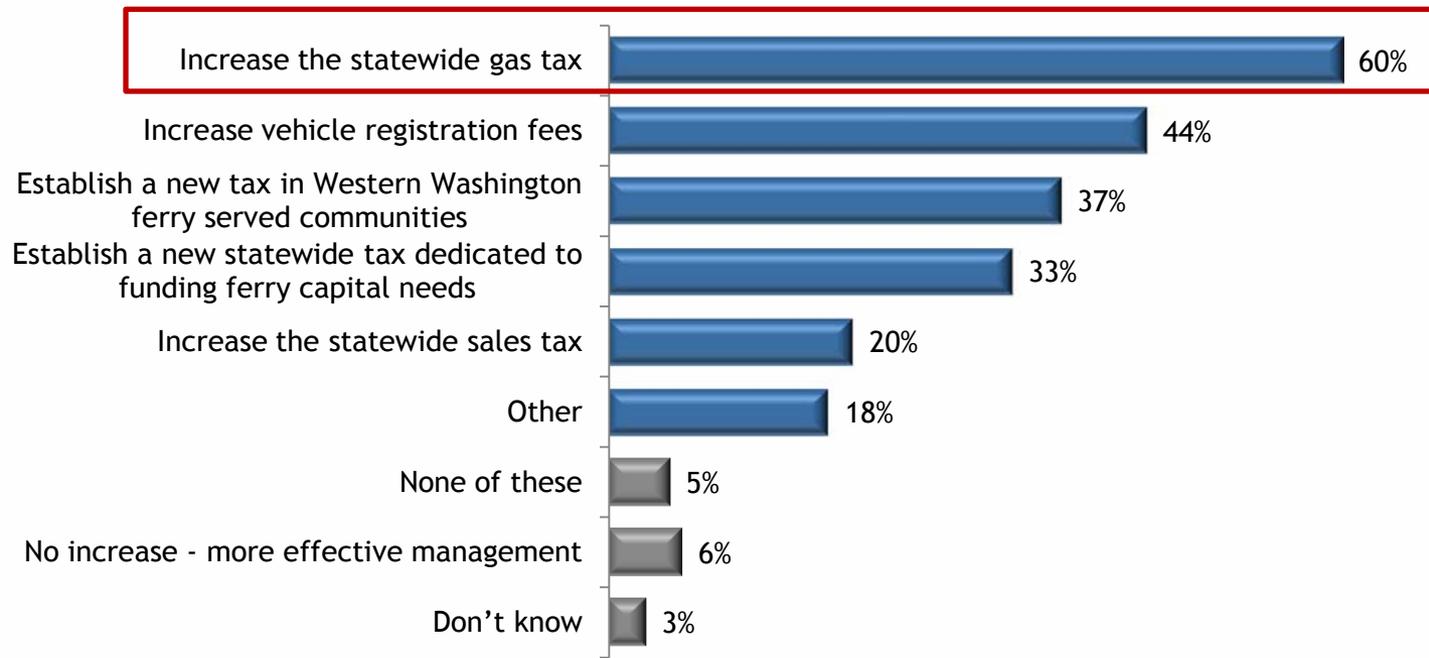
* Caution: Small sample sizes



Support for 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.

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 Capital Funding Methods - By Route

❖ Respondents on the Seattle/Bainbridge route are more likely to recommend increasing the statewide gas tax, increasing vehicle registration fees and establishing a new tax in Western Washington communities serviced by the ferries as methods to fund WSF’s capital needs.

Recommended Capital Funding Methods	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*
Increase the statewide gas tax	66%	51%	53%	62%	54%	44%	56%	61%	51%	65%	73%
Increase vehicle registration fees	53%	38%	36%	53%	44%	56%	50%	42%	34%	42%	50%
Establish a new tax in Western Washington ferry served communities	42%	38%	39%	41%	37%	22%	33%	33%	23%	25%	31%
Establish a new statewide tax dedicated to funding ferry capital needs	34%	28%	37%	35%	28%	44%	33%	34%	26%	31%	34%
Increase the statewide sales tax	22%	18%	20%	17%	25%	0%	17%	21%	13%	22%	20%
No increase - more effective management	4%	7%	7%	4%	7%	22%	6%	9%	8%	6%	8%
Other	16%	18%	20%	24%	17%	0%	19%	18%	13%	17%	12%
None of these	3%	7%	7%	4%	11%	0%	6%	5%	13%	6%	4%
Don't know	2%	5%	3%	2%	4%	11%	2%	3%	8%	3%	7%

* Caution: Small sample sizes



Support for Capital Funding Methods - By District

❖ Roughly three fourths of respondents in legislative districts 43 and 46 (77% and 73%, respectively) would recommend increasing the statewide gas tax to fund the capital needs of the ferries.

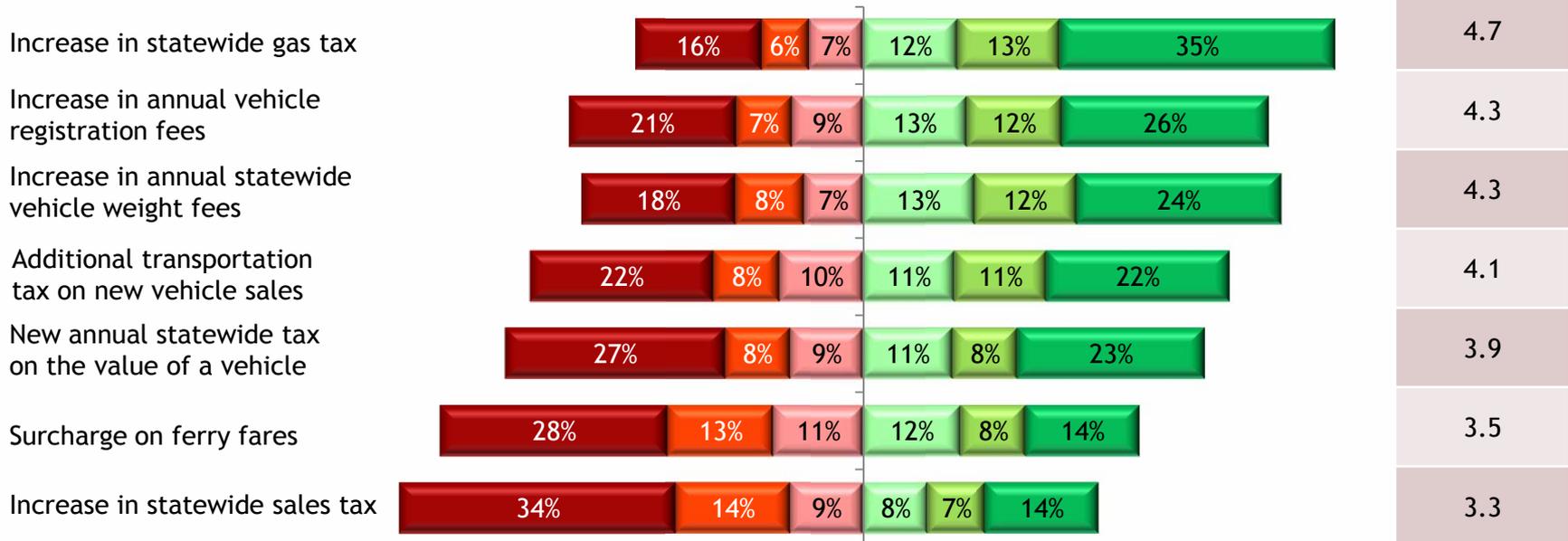
Recommended Capital Funding Methods	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Increase the statewide gas tax	47%	59%	66%	43%	61%	55%	52%	51%	60%	49%	68%	67%	65%	77%	73%
Increase vehicle registration fees	19%	40%	29%	20%	48%	40%	42%	25%	50%	38%	50%	36%	41%	59%	50%
Establish a new tax in Western Washington ferry served communities	49%	31%	73%	61%	36%	32%	33%	44%	41%	36%	48%	50%	23%	59%	59%
Establish a new statewide tax dedicated to funding ferry capital needs	37%	32%	35%	35%	33%	34%	28%	39%	35%	28%	38%	27%	33%	34%	32%
Increase the statewide sales tax	11%	21%	25%	12%	20%	27%	21%	10%	17%	17%	22%	11%	22%	19%	23%
No increase - more effective management	9%	8%	0%	8%	6%	8%	9%	6%	4%	8%	2%	8%	7%	3%	0%
Other	19%	19%	18%	17%	15%	21%	9%	26%	23%	16%	21%	27%	15%	14%	16%
None of these	6%	3%	0%	2%	3%	3%	6%	2%	2%	6%	0%	0%	4%	1%	0%
Don't know	5%	6%	2%	6%	5%	6%	9%	6%	4%	8%	5%	4%	6%	2%	5%



Support for 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.
- ❖ Increasing the statewide sales tax and introducing a fare surcharge have the lowest support of the seven alternatives tested.

Support of WSF Capital Funding
 (n=1,951)
Would not support at all ← → *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...



Support for Capital Funding Methods - By Route

Support of WSF Capital Funding		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*
Increase the statewide gas tax	% Support (6-7)	55%	37%	39%	61%	39%	33%	46%	46%	49%	48%	56%
	Average Score	5.2	4.1	4.4	5.3	4.4	4.2	4.7	4.8	4.5	4.8	5.2
Increase in annual vehicle registration fees	% Support (6-7)	43%	34%	26%	60%	40%	33%	40%	33%	26%	39%	42%
	Average Score	4.7	4.0	3.7	5.1	4.1	4.4	4.6	4.1	3.7	4.2	4.6
Increase in annual statewide vehicle weight fees	% Support (6-7)	39%	31%	34%	44%	41%	11%	37%	33%	38%	30%	32%
	Average Score	4.7	4.0	4.0	4.6	4.3	3.2	4.4	4.1	4.5	4.2	4.3
Additional transportation tax on new vehicle sales	% Support (6-7)	37%	29%	30%	46%	37%	22%	38%	29%	28%	28%	37%
	Average Score	4.4	3.7	3.7	4.7	4.1	4.1	4.4	4.0	3.7	3.8	4.4
New annual statewide tax on the value of a vehicle	% Support (6-7)	35%	27%	26%	47%	29%	22%	38%	28%	23%	32%	37%
	Average Score	4.3	3.5	3.5	4.8	3.6	4.0	4.3	3.8	3.4	3.9	4.3
Surcharge on ferry fares	% Support (6-7)	24%	24%	27%	15%	23%	22%	19%	22%	25%	12%	21%
	Average Score	3.6	3.6	3.7	3.1	3.8	3.0	3.0	3.4	3.5	3.0	3.4
Increase in statewide sales tax	% Support (6-7)	23%	23%	18%	22%	25%	0%	17%	21%	15%	30%	24%
	Average Score	3.4	3.3	3.0	3.3	3.3	2.1	3.2	3.3	2.7	3.5	3.4

* Caution: Small sample sizes



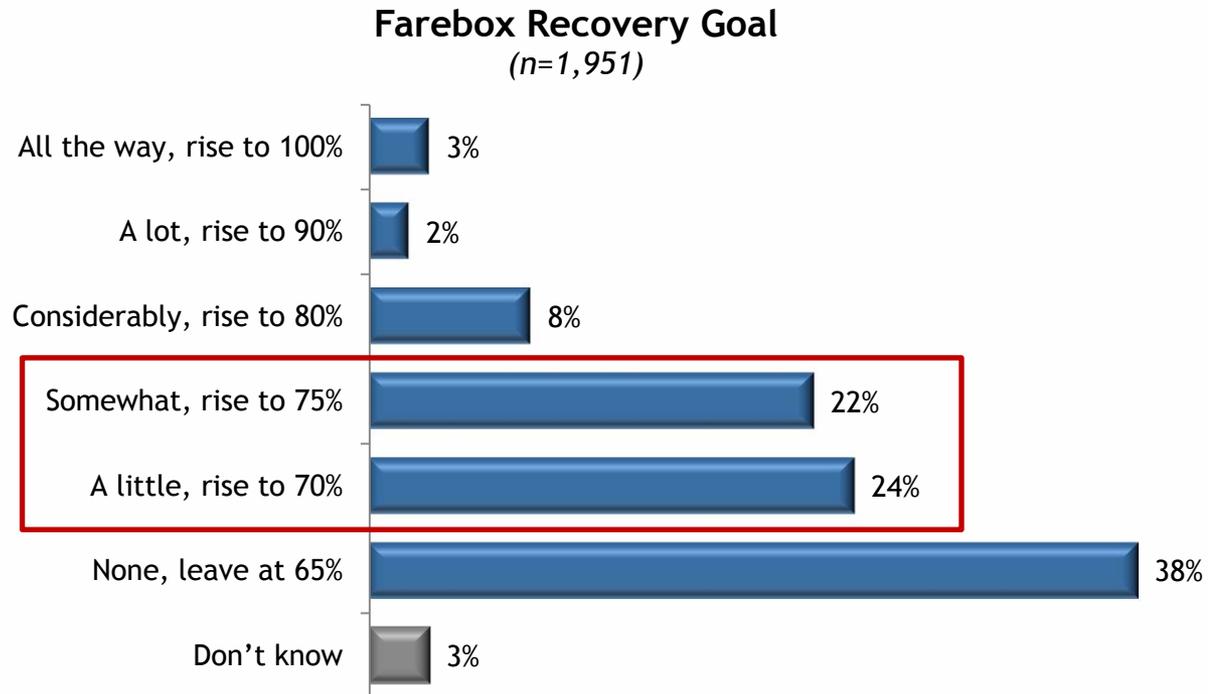
Support for Capital Funding Methods - By District

Support of WSF Capital Funding		LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Increase the statewide gas tax	% Support (6-7)	38%	47%	39%	25%	49%	46%	40%	34%	58%	37%	43%	51%	45%	54%	50%
	Average Score	4.2	4.8	4.8	3.8	4.8	4.7	4.3	4.0	5.2	4.1	4.8	5.2	4.7	5.3	4.9
Increase in annual vehicle registration fees	% Support (6-7)	16%	33%	20%	16%	41%	27%	38%	17%	54%	35%	28%	26%	40%	38%	32%
	Average Score	3.5	4.1	3.7	3.4	4.4	3.9	4.1	3.4	4.9	4.0	3.9	4.0	4.3	4.5	4.1
Increase in annual statewide vehicle weight fees	% Support (6-7)	33%	32%	46%	33%	37%	35%	34%	42%	41%	33%	28%	37%	28%	38%	41%
	Average Score	4.1	4.1	5.0	4.1	4.4	4.4	4.1	4.5	4.5	3.9	4.6	4.3	4.1	4.8	4.8
Additional transportation tax on new vehicle sales	% Support (6-7)	19%	29%	38%	16%	35%	36%	34%	15%	45%	30%	31%	30%	30%	31%	34%
	Average Score	3.4	3.9	4.3	3.6	4.1	4.1	4.0	3.2	4.7	3.8	4.3	3.6	4.0	4.4	4.3
New annual statewide tax on the value of a vehicle	% Support (6-7)	15%	27%	23%	20%	34%	23%	31%	16%	46%	28%	27%	35%	32%	41%	36%
	Average Score	3.0	3.7	3.9	3.4	4.1	3.5	3.7	3.2	4.6	3.5	3.8	3.9	3.9	4.5	4.3
Surcharge on ferry fares	% Support (6-7)	35%	22%	50%	40%	20%	34%	25%	27%	15%	22%	23%	43%	12%	30%	23%
	Average Score	4.4	3.4	5.1	4.6	3.3	4.1	3.6	3.8	3.1	3.5	4.1	4.7	3.0	4.2	3.8
Increase in statewide sales tax	% Support (6-7)	15%	20%	18%	17%	23%	21%	22%	21%	23%	22%	17%	16%	29%	19%	23%
	Average Score	2.7	3.3	2.8	2.9	3.3	3.1	3.2	2.8	3.4	3.2	3.1	2.7	3.6	3.1	3.3



Farebox Recovery Goal

- ❖ Three fourths (62%) of ferry riders support increasing the fare coverage of operational costs to free up money for capital projects - 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).
- ❖ However, 38% do not support any increase above the current 65% recovery rate.



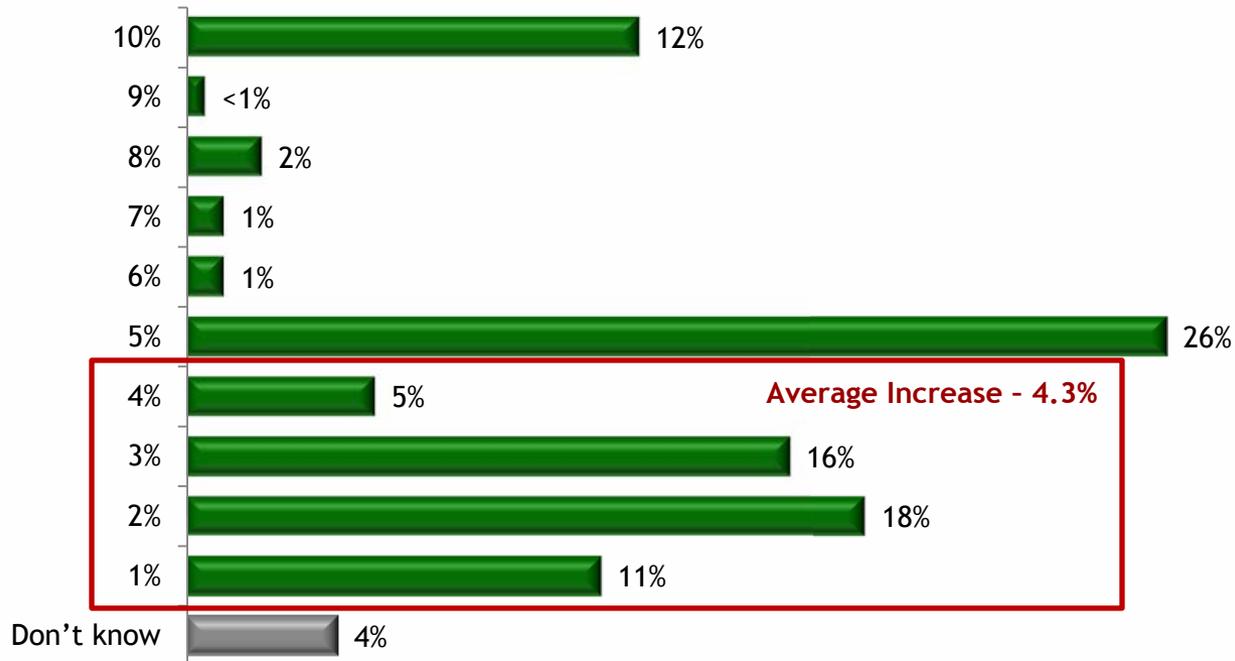
C13 Currently fares cover two-thirds (approximately 65%) of daily operations costs and statewide gas taxes subsidize the remaining 35%. To free up those statewide gas tax dollars to cover capital needs, how much, if any, would you suggest fares be increased to cover more of the daily operating costs?



Reasonable Increase in Annual Fares

- ❖ Those who support higher coverage of operating costs from fares feel fares should increase about 4.3% annually, on average.

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



C14 You mentioned that fares should increase [INSERT C13 RESPONSE HERE] to free up more statewide gas tax dollars to cover capital needs. How much do you believe it would be reasonable for fares to increase each year in order to achieve that goal over time?



Farebox Recovery Goal by Route

- ❖ Point Defiance/Tahlequah and Anacortes/Friday Harbor riders prefer to leave the ferry fares as they are now, covering only 65% of daily operating costs.

Fare Increase to Cover Operating Costs	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*
All the way, rise to 100%	3%	2%	3%	4%	7%	0%	0%	5%	11%	1%	1%
A lot, rise to 90%	2%	2%	2%	2%	2%	0%	0%	1%	0%	1%	1%
Considerably, rise to 80%	7%	12%	8%	6%	7%	0%	8%	8%	11%	7%	5%
Somewhat, rise to 75%	25%	24%	26%	15%	17%	33%	13%	22%	15%	17%	18%
A little, rise to 70%	24%	24%	22%	30%	28%	22%	23%	25%	17%	23%	35%
None, leave at 65%	37%	31%	35%	40%	38%	33%	54%	36%	40%	48%	38%
Don't know	2%	4%	4%	3%	2%	11%	2%	3%	6%	3%	2%

* Caution: Small sample sizes



Farebox Recovery Goal by District

- ❖ Residents of the Western and Northern legislative districts are more likely to maintain that fares be kept as is, not increasing them to help cover capital needs.

Fare Increase to Cover Operating Costs	LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
All the way, rise to 100%	6%	5%	2%	4%	2%	7%	3%	7%	3%	3%	5%	4%	1%	5%	2%
A lot, rise to 90%	9%	2%	11%	6%	1%	1%	1%	0%	2%	1%	3%	12%	1%	4%	0%
Considerably, rise to 80%	21%	9%	7%	27%	7%	7%	12%	15%	5%	10%	5%	13%	5%	7%	7%
Somewhat, rise to 75%	15%	22%	33%	14%	22%	30%	23%	20%	12%	25%	39%	22%	16%	41%	43%
A little, rise to 70%	26%	24%	28%	27%	22%	25%	20%	21%	31%	23%	25%	20%	26%	22%	23%
None, leave at 65%	20%	37%	18%	21%	43%	28%	37%	34%	44%	35%	17%	21%	47%	15%	23%
Don't know	3%	2%	0%	2%	3%	2%	4%	4%	3%	4%	6%	8%	3%	5%	2%



Reasonable Increase in Annual Fares by Route

- ❖ Of those who support higher coverage of operating costs from fares, Port Townsend/Coupeville riders suggest the highest average increase of 5.3%.

Appropriate Annual Fare Increase	SEA/ BAIN n=309	SEA/ BREM n=139	EDM/ KIN n=220	FAU/ VAS n=92	FAU/ SOU n=41	SOU/ VAS n=8*	PTD/ TAH n=24*	MUK/ CLI n=206	PTT/ COU n=28*	ANA/ FRI n=80	INTR SJI n=9*
10%	11%	15%	15%	8%	9%	20%	13%	10%	17%	18%	7%
9%	0%	0%	0%	0%	0%	0%	0%	1%	3%	0%	0%
8%	2%	1%	1%	4%	3%	0%	0%	1%	3%	0%	1%
7%	1%	2%	2%	2%	3%	0%	4%	1%	0%	0%	1%
6%	1%	2%	1%	1%	0%	0%	0%	1%	0%	2%	1%
5%	27%	22%	27%	27%	18%	20%	22%	25%	31%	30%	30%
4%	4%	4%	7%	4%	5%	20%	9%	6%	7%	7%	3%
3%	15%	20%	16%	14%	20%	0%	26%	15%	7%	18%	21%
2%	18%	15%	16%	22%	18%	20%	22%	19%	17%	18%	18%
1%	13%	14%	7%	12%	15%	20%	4%	13%	3%	2%	10%
Don't know	4%	2%	4%	5%	5%	0%	0%	3%	0%	5%	3%
Average Increase	4.2%	4.3%	4.7%	4.1%	3.9%	4.4%	4.3%	4.1%	5.3%	4.9%	3.9%

* Caution: Small sample sizes



Support for Change in Fares

- ❖ More than two fifth (45%) of ferry riders 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”)



Support of Change in Fares - By Route & Ticket

- ❖ Riders using a multi-rider ticket are less supportive of all three tested fare changes, when compared to those using a regular single-ride ticket or those using a senior/disabled ticket.
- ❖ Riders on Point Defiance/Tahlequah, Fautleroy/Vashon and the San Juan routes are significantly less supportive of the multi-ride ticket being always priced 20% less than a single ride ticket.

Support of Fare Changes		REG TCKT n=417	MULTI TCKT n=804	SR TCKT n=210	OTHR n=521
Charging additional \$.10 per fare	% Support (6-7)	61%	56%	64%	50%
	Average Score	5.5	5.1	5.4	5.1
Multi-ride ticket always 20% less than single fare ticket	% Support (6-7)	40%	21%	37%	32%
	Average Score	4.6	3.1	4.2	3.8
Charging addl \$1-5 per vehicle ticket/\$.50 per passenger ticket	% Support (6-7)	31%	18%	29%	22%
	Average Score	3.9	3.0	3.6	3.4

Support of Fare Changes		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*
Charging additional \$.10 per fare	% Support (6-7)	54%	54%	53%	60%	72%	56%	52%	58%	58%	63%	66%
	Average Score	5.0	5.2	5.3	5.3	5.7	5.1	5.0	5.2	5.3	5.3	5.6
Multi-ride ticket always 20% less than single fare ticket	% Support (6-7)	32%	40%	30%	25%	38%	33%	13%	30%	43%	11%	23%
	Average Score	3.9	4.5	3.8	3.2	4.0	3.8	2.9	3.7	4.3	2.6	3.0
Charging addl \$1-5 per vehicle ticket/\$.50 per passenger ticket	% Support (6-7)	23%	27%	30%	15%	25%	0%	12%	19%	21%	22%	28%
	Average Score	3.4	3.7	3.6	3.0	3.5	2.8	2.4	3.1	3.3	3.4	3.8

* Caution: Small sample sizes



Support of Change in Fares - By District

- ❖ Support for charging an additional \$1-5 per vehicle ticket and \$.50 per passenger ticket to go to a capital fund is highest and surpasses 50% in legislative districts 1, 21 and 37.

Support of Fare Changes		LEG 1 n=54	LEG 10 n=330	LEG 11 n=30	LEG 21 n=39	LEG 23 n=686	LEG 24 n=160	LEG 26 n=144	LEG 32 n=42	LEG 34 n=214	LEG 35 n=230	LEG 36 n=71	LEG 37 n=35	LEG 40 n=157	LEG 43 n=81	LEG 46 n=44
Charging additional \$.10 per fare	% Support (6-7)	76%	56%	72%	75%	48%	66%	63%	65%	58%	57%	53%	64%	62%	58%	68%
	Average Score	6.0	5.2	6.0	6.0	4.8	5.7	5.4	6.0	5.2	5.2	5.6	5.7	5.2	5.6	6.1
Multi-ride ticket always 20% less than single fare ticket	% Support (6-7)	41%	30%	45%	38%	30%	40%	37%	35%	21%	36%	30%	38%	13%	26%	30%
	Average Score	4.7	3.6	4.6	4.7	3.7	4.4	4.1	4.3	3.1	4.2	4.1	4.8	2.7	4.1	3.8
Charging addl \$1-5 per vehicle ticket/\$.50 per passenger ticket	% Support (6-7)	52%	19%	43%	55%	20%	31%	23%	44%	15%	21%	24%	53%	19%	35%	20%
	Average Score	4.9	3.1	4.7	5.1	3.2	3.8	3.3	4.4	2.9	3.4	3.9	4.9	3.3	4.3	3.7



Support of Car Size Based Fares

- ❖ Support for changing the threshold for the vehicle length surcharge from over 20' to over 14' - 16' is low, with 52%-60% rating their support at a 1 or 2 on a 7-point scale where "1" means "would not support at all" and "7" means "would completely support."



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

C15d At present, vehicles over 20' are charged a higher fare. How supportive would you be of starting the higher fare at a shorter vehicle length, in order to reduce the need for more or larger boats?



Support for Car Size Based Fares - By Route

- ❖ Seattle/Bainbridge and Seattle/Bremerton riders are more likely to support starting the higher fare at a shorter vehicle length to reduce the need for more of larger boats.

Support of Fare Changes Based on Car Size - 14'		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*
A 25% higher fare charged on vehicles over 14' such as 4-door passenger cars, SUVs, pickup trucks, mini-vans, etc.	% Support (6-7)	19%	24%	8%	13%	19%	11%	13%	14%	19%	10%	14%
	Average Score	3.1	3.3	2.3	2.5	2.7	2.4	2.4	2.6	3.0	2.4	2.5

Support of Fare Changes Based on Car Size - 16'		SEA/ BAIN n=414	SEA/ BREM n=164	EDM/ KIN n=332	FAU/ VAS n=142	FAU/ SOU n=55	SOU/ VAS n=13*	PTD/ TAH n=48	MUK/ CLI n=288	PTT/ COU n=42	ANA/ FRI n=147	INTR SJI n=12*
A 25% higher fare charged on vehicles over 16' such as luxury sedans, full size SUVs, full size pickup trucks and mini vans.	% Support (6-7)	20%	14%	15%	19%	17%	13%	16%	17%	26%	18%	16%
	Average Score	3.4	3.1	2.8	3.0	2.9	1.9	2.8	2.8	3.2	2.8	2.8

* Caution: Small sample sizes



Demographic Information

- Unless stated, demographic information is consistent with previous studies.



Years Riding

❖ Roughly three fourths (72%) of ferry riders have been riding the ferries for more than ten years.

2010	TOTAL n=1951	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*
Less than one year	2%	2%	7%	<1%	2%	1%	0%	0%	1%	2%	1%	2%
1 year, but less than 3 years	5%	7%	8%	3%	4%	4%	11%	6%	5%	6%	3%	3%
3 years, but less than 6 years	8%	9%	13%	6%	8%	6%	11%	8%	8%	6%	9%	5%
6 years, but less than 10 years	13%	13%	14%	15%	8%	28%	22%	13%	9%	6%	10%	10%
More than 10 years	72%	70%	58%	75%	78%	62%	56%	73%	77%	81%	78%	80%

P3 How many years have you been riding the ferries?

* Caution: Small sample sizes



Ridership Frequency

❖ Half (49%) of riders have increased their ferry riding frequency since they first started riding the ferries.

2010	TOTAL n=1951	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*
Increased	49%	42%	42%	53%	46%	46%	33%	54%	52%	64%	68%	67%
Increased significantly	29%	22%	25%	33%	27%	23%	11%	31%	34%	43%	33%	40%
Increased somewhat	21%	19%	17%	20%	19%	23%	22%	23%	19%	21%	35%	27%
No change at all	29%	32%	39%	29%	27%	32%	67%	27%	26%	11%	13%	16%
Decreased somewhat	14%	16%	10%	11%	19%	15%	0%	13%	15%	11%	15%	14%
Decreased significantly	8%	11%	8%	7%	9%	7%	0%	6%	7%	13%	4%	3%
Decreased	22%	26%	19%	18%	28%	22%	0%	19%	22%	25%	19%	17%

P4 Since you started riding the ferries, has the frequency with which you ride...?

* Caution: Small sample sizes



Rider Satisfaction

- ❖ Two thirds (68%) of ferry riders are satisfied with the Washington State Ferries, down significantly from the combined summer and winter satisfaction (74%).
 - Comparing rider satisfaction measured during the capital funding survey against summer and winter satisfaction independently, rider satisfaction is down significantly (76% summer and 72% winter).

2010	TOTAL n=1951	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*
Satisfied	68%	80%	58%	69%	61%	57%	56%	60%	72%	62%	47%	58%
Extremely satisfied	21%	25%	15%	22%	14%	17%	0%	13%	29%	30%	11%	8%
Somewhat satisfied	46%	55%	42%	47%	47%	40%	56%	46%	43%	32%	35%	49%
Neither	12%	9%	10%	10%	17%	17%	11%	17%	13%	6%	18%	12%
Somewhat dissatisfied	17%	10%	27%	17%	18%	18%	33%	23%	12%	26%	22%	24%
Extremely dissatisfied	4%	1%	6%	4%	3%	8%	0%	0%	3%	6%	13%	6%
Dissatisfied	21%	11%	33%	21%	21%	27%	33%	23%	15%	32%	35%	30%

P5 Overall, how satisfied are you with Washington State Ferries?

* Caution: Small sample sizes



Ferry Value

- ❖ Half (50%) of ferry riders feel that the Washington State Ferries provide a good value for the amount of money they pay.
 - Value perception is consistent with the findings from the winter survey (53%); however, the perceived value of the ferries from the summer survey was significantly higher (75%).

2010	TOTAL n=1951	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*
Good value	50%	56%	56%	51%	37%	54%	0%	33%	52%	66%	35%	40%
A very good value	13%	15%	15%	13%	8%	18%	0%	6%	13%	25%	5%	8%
A good value	37%	41%	41%	38%	29%	36%	0%	27%	39%	42%	30%	31%
Neither	35%	34%	30%	30%	42%	32%	89%	38%	37%	25%	45%	46%
A poor value	12%	9%	11%	16%	19%	11%	11%	29%	8%	4%	14%	14%
A very poor value	3%	1%	3%	4%	2%	3%	0%	0%	3%	6%	6%	1%
Poor value	15%	10%	14%	19%	21%	14%	11%	29%	11%	9%	20%	14%

P6 Which of the following phrases best describes the value, to you, of riding Washington State Ferries?
 “Value” means what you receive for the amount you pay. Are Washington State Ferries...?

* Caution: Small sample sizes



People vs. Vehicle Mover

- ❖ Overall, ferry riders are split between whether to focus WSF improvements on becoming a people-mover or a vehicle-mover system.

2010	TOTAL n=1951	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*
People-mover system	28%	12%	16%	34%	31%	30%	11%	37%	40%	23%	44%	52%
Both equally	44%	48%	32%	49%	43%	41%	33%	48%	45%	51%	40%	38%
Vehicle-mover system	28%	39%	53%	17%	26%	28%	56%	15%	15%	26%	16%	10%

* Caution: Small sample sizes

P7 Washington State Ferries is currently both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a People-Mover (vehicles are secondary) or a Vehicle-Mover (people are secondary) system?



Demographics - Distance From Ferry

❖ Two thirds (68%) of ferry riders live within 10 miles of the ferry terminal.

2010	TOTAL n=1951	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*
Less than 1 mile	1%	1%	0%	0%	3%	1%	0%	0%	0%	0%	1%	0%
1-5 miles	40%	56%	49%	27%	33%	38%	44%	38%	24%	40%	49%	31%
6-10 miles	27%	17%	21%	30%	38%	39%	44%	38%	34%	8%	31%	27%
11-15 miles	13%	10%	11%	10%	24%	12%	0%	15%	20%	13%	6%	18%
16-20 miles	5%	4%	6%	6%	1%	6%	0%	2%	11%	4%	2%	6%
Over 20 miles	14%	12%	13%	27%	1%	5%	11%	6%	11%	36%	11%	18%
Median	7.0	5.0	6.0	10.0	7.0	6.0	7.0	8.0	10.0	12.0	5.5	10.0

* Caution: Small sample sizes



Demographics - Community Involvement

❖ The majority (82%) of respondents do not attend ferry advisory meetings.

2010	TOTAL n=1951	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*
Descriptors (1 - Not at all; 10 - Completely)												
My friends and family look to me for information about corporations and other organizations	5.8	5.8	5.2	5.9	5.9	6.2	5.9	5.4	5.8	6.1	5.8	5.6
I pay attention to how organizations act in my local community	7.2	7.1	6.7	7.1	7.5	7.5	6.3	6.5	7.5	7.7	7.3	7.6
My friends and family look to me for information about local news and events	6.2	6.1	6.0	6.4	6.4	6.4	5.7	5.7	6.3	6.8	6.4	6.4
Advisory Meetings Attended												
Ferry Advisory Committee (F.A.C.)	7%	4%	6%	7%	17%	5%	11%	13%	5%	8%	8%	9%
Washington State Ferries (W.S.F.)	15%	8%	14%	14%	26%	17%	11%	27%	18%	15%	16%	15%
Transportation Commission meetings regarding ferry fares	4%	2%	4%	4%	10%	4%	0%	4%	5%	6%	4%	3%
Other ferry specific related meetings	4%	2%	1%	7%	8%	2%	0%	10%	6%	6%	2%	3%
None of the above	82%	89%	83%	83%	66%	80%	89%	67%	78%	81%	82%	80%

* Caution: Small sample sizes



Demographics - Gender & Age

- ❖ The balance of gender is very well balanced (42% male, 58% female) and four fifths (80%) of the respondents are 45 yrs old or over.

2010	TOTAL n=1951	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*
Male	42%	42%	45%	36%	42%	38%	33%	46%	42%	42%	52%	50%
Female	58%	58%	55%	64%	58%	62%	67%	54%	58%	58%	48%	50%

2010	TOTAL n=1951	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*
18-24	1%	2%	3%	<1%	0%	0%	0%	2%	<1%	0%	1%	0%
25-34	7%	6%	19%	5%	3%	6%	11%	4%	4%	6%	8%	2%
35-44	13%	15%	15%	14%	9%	14%	33%	12%	8%	8%	10%	9%
45-54	25%	26%	29%	24%	31%	31%	11%	29%	24%	26%	12%	18%
55-64	36%	32%	22%	37%	41%	40%	44%	37%	39%	42%	43%	33%
65+	19%	19%	13%	19%	16%	9%	0%	17%	24%	19%	26%	38%
Median Age	56.0	55.0	50.0	56.0	57.0	54.0	54.0	56.0	58.0	59.0	59.5	61.0

* Caution: Small sample sizes



Demographics - Household

❖ Half (53%) of respondents reside in a household of 2 people.

2010	TOTAL n=1951	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*
People in Household												
1	14%	16%	15%	13%	13%	15%	22%	17%	11%	8%	14%	9%
2	53%	49%	53%	54%	46%	50%	56%	44%	61%	64%	59%	65%
3	15%	13%	14%	15%	22%	17%	11%	15%	13%	17%	16%	13%
4	12%	16%	10%	11%	16%	15%	11%	21%	10%	8%	7%	8%
5 or more	5%	6%	7%	7%	3%	4%	0%	2%	5%	4%	4%	4%
<i>Median</i>	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
People under 18	n=1680	n=428	n=182	n=313	n=142	n=58	n=12*	n=46	n=298	n=47	n=141	n=13*
0	72%	69%	75%	72%	62%	71%	71%	65%	79%	84%	76%	78%
1	13%	12%	15%	12%	22%	16%	14%	21%	10%	8%	15%	11%
2	11%	15%	6%	13%	13%	11%	14%	14%	9%	6%	6%	8%
3	3%	4%	3%	2%	3%	1%	0%	0%	2%	2%	3%	2%
4 or more	1%	1%	1%	2%	1%	1%	0%	0%	1%	0%	0%	1%
<i>Median</i>	2.0	2.0	1.0	2.0	1.0	1.0	1.0	1.0	2.0	1.5	1.0	1.0

* Caution: Small sample sizes



Demographics - Kid's Ferry Travel

- ❖ In households with children under the age of 18, roughly half (45%) state that the children always travel on the ferries with immediate family.

2010	TOTAL n=464	SEA/ BAIN n=132	SEA/ BREM n=46	EDM/ KIN n=88	FAU/ VAS n=54	FAU/ SOU n=17*	SOU/ VAS n=3*	PTD/ TAH n=16*	MUK/ CLI n=64	PTT/ COU n=8*	ANA/ FRI n=34	INTR SJI n=3*
Ferry travel of those under 18												
Yes, travel on ferries by themselves	38%	38%	35%	33%	49%	19%	50%	40%	43%	50%	42%	23%
Yes, travel on ferries in school bus/van	34%	44%	28%	25%	36%	22%	0%	33%	35%	25%	38%	43%
Yes, travel on ferries in church/club bus/van/car outings	21%	29%	14%	18%	22%	19%	0%	20%	21%	0%	13%	27%
No, they always travel with immediate family	45%	36%	58%	51%	36%	70%	50%	40%	44%	50%	58%	43%

* Caution: Small sample sizes



Demographics - Employment Status & Annual Income

❖ Three fifths (59%) of respondents are employed full time.

2010	TOTAL n=1951	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*
Employed full-time	59%	58%	70%	63%	60%	73%	89%	65%	51%	42%	47%	34%
Employed part-time	11%	12%	5%	12%	13%	2%	11%	8%	10%	9%	16%	18%
Student/employed	1%	2%	2%	0%	1%	1%	0%	2%	1%	2%	1%	1%
Student/not employed	1%	2%	2%	0%	0%	0%	0%	2%	1%	0%	1%	0%
Military personnel	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Retired	18%	16%	11%	16%	15%	14%	0%	19%	25%	30%	25%	32%
Homemaker	1%	2%	0%	1%	1%	2%	0%	0%	2%	2%	3%	5%
Not employed	2%	3%	4%	1%	3%	3%	0%	0%	2%	2%	2%	3%
Other	9%	10%	4%	6%	12%	7%	0%	6%	12%	18%	9%	19%

2010	TOTAL n=1951	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*
Under \$15,000	1%	2%	1%	1%	0%	3%	0%	2%	2%	2%	1%	1%
\$15,000-\$24,999	2%	3%	4%	1%	2%	1%	0%	6%	2%	8%	3%	4%
\$25,000-\$34,999	5%	3%	9%	4%	7%	1%	11%	8%	4%	6%	7%	7%
\$35,000-\$49,999	9%	7%	6%	9%	7%	10%	11%	6%	11%	21%	15%	12%
\$50,000-\$74,999	16%	16%	20%	14%	13%	15%	22%	13%	16%	11%	22%	15%
\$75,000-\$99,999	18%	14%	16%	23%	19%	23%	22%	15%	18%	11%	17%	12%
\$100,000-\$149,999	20%	24%	19%	20%	18%	20%	11%	27%	16%	17%	13%	16%
\$150,000 or more	12%	17%	9%	9%	17%	11%	11%	10%	12%	8%	9%	10%

* Caution: Small sample sizes



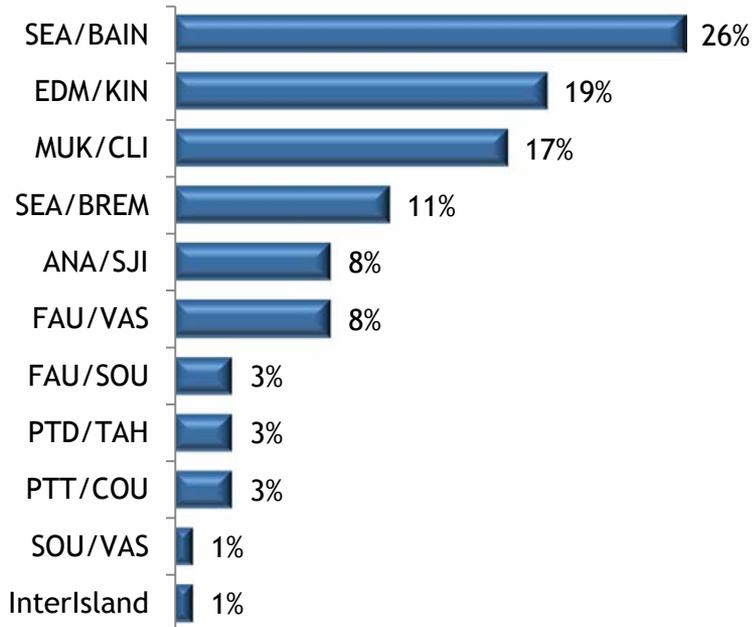
Appendix A: Weighting Scheme



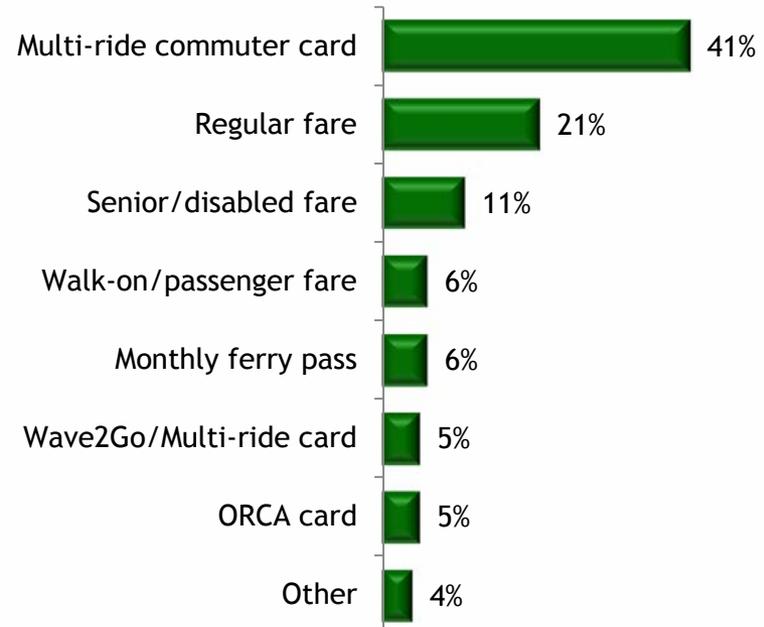
Weighting Bases

- ❖ **Seattle/Bainbridge** is ridden significantly more often than the other WSF routes (26%).
 - The top three routes are consistent with the top routes ridden in the Winter and Summer surveys.
- ❖ Two fifths (41%) of riders use a **multi-ride commuter card** most often; whereas in the Summer survey, the regular fare ticket was used slightly more often, likely due to the influx of summer seasonal travelers (regular fare 38% vs. multi-ride 35%).

Route Taken Most Often
(n=1,951)



Fare Ticket Used
(n=1,951)



R1 In order for us to have some context for your answers, which ferry route do you ride MOST OFTEN?

R2 What type of fare ticket do you most often use on that route?



Weight Bases: Fare Ticket Used - By Route

- ❖ Multi-ride commuter cards are used more frequently on Fauntleroy/Vashon, Point Defiance/Tahlequah, Mukilteo/Clinton and Anacortes/Friday Harbor routes.
- ❖ Regular fare tickets are used most frequently on Edmonds/Kingston and Port Townsend/Coupeville.
- ❖ Walk-on tickets are used most often on the Seattle/Bremerton and Seattle/Bainbridge routes.

Fare Ticket Used	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*
Multi-ride commuter card	31%	23%	30%	68%	36%	56%	67%	51%	11%	77%	61%
Regular fare	17%	19%	39%	13%	23%	0%	19%	16%	53%	9%	14%
Senior/disabled fare	11%	10%	14%	5%	12%	0%	4%	13%	15%	5%	17%
Walk-on/passenger fare	9%	16%	3%	3%	7%	11%	2%	4%	8%	2%	2%
Monthly ferry pass	10%	9%	6%	2%	5%	0%	4%	3%	2%	0%	0%
Wave2Go/Multi-ride card	7%	6%	4%	3%	3%	11%	2%	6%	9%	5%	5%
ORCA card	8%	12%	2%	3%	8%	22%	0%	3%	0%	0%	0%
Other	7%	5%	4%	3%	6%	0%	2%	3%	2%	2%	1%

* Caution: Small sample sizes



Weighting Scheme

	Systemwide Riders	Desired Proportion	Completed surveys	Desired # of completes	Weight
SEA/BAIN	1,254,967	26%	398	513	1.288607
SEA/BRE	593,688	12%	203	243	1.19518
PTD/TAH	139,910	3%	52	57	1.099554
EDM/KIN	880,869	18%	249	360	1.445716
FAU/VAS	434,120	9%	178	177	0.996692
FAU/SOU	173,587	4%	109	71	0.650821
SOU/VAS	36,956	1%	9	15	1.678084
PTT/KEY	98,654	2%	53	40	0.760694
MUK/CLI	865,110	18%	431	354	0.820286
ANA/SAN	262,860	6%	116	107	0.926057
Interisland	33,320	1%	153	14	0.088999
TOTAL	4,774,041	100%	1951	1951	



Appendix B: Questionnaire



Questionnaire



Washington State Transportation Commission

Capital Funding Survey
Final Candidate
November 4, 2010

LANDING PAGE

We appreciate your help on this important Washington State Ferries Capital Funding Survey.

We will be looking at issues such as:

- Long term capital funding of ferries and terminals
- Which taxes and other sources should be used to fund the ferry's capital needs
- What capital projects should be undertaken to improve future service

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

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

Sincerely,
Philip Parker, Chairman
Washington State Transportation Commission

STUDY EXPLANATION SCREEN

This survey deals with capital funding for Washington State Ferries. **Capital funding** is used for major overhaul and the preservation of boats and terminals, replacement of older boats, and the building of new boats and terminals. **Operational funding**, in contrast, is used to pay for daily costs such as fuel, wages, and the day-to-day general maintenance of the boats and terminals.

The questions in this survey, like other surveys we conduct, are not being asked because they are indeed going to happen. We ask questions that cover the gamut of possibilities to find out what you think so that we can more effectively identify the things that are worth exploring further and the things that are simply not, due to a complete lack of support.

Thank you again, for taking the time to help us understand how you would like us to spend your tax dollars.

MOST FREQUENT ROUTE

R1. In order for us to have some context for your answers, which ferry route do you ride MOST OFTEN? If you ride more than one with equal frequency, please mark the one you consider to be most important for you.

- 11 Seattle/Bainbridge
- 12 Seattle/Bremerton
- 13 Point Defiance/Tahlequah
- 14 Edmonds/Kingston
- 15 Fauntleroy/Vashon
- 16 Fauntleroy/Southworth
- 17 Southworth/Vashon
- 18 Port Townsend/Coupeville
- 19 Mukilteo/Clinton
- 20 Anacortes/Friday Harbor
- 21 Anacortes/Lopez
- 22 Anacortes/Orcas
- 23 Anacortes/Shaw
- 24 San Juan Interisland
- 25 Anacortes/Sydney

R2. What type of fare ticket do you most often use on that route?

- 1 Regular Fare -- Vehicle & Driver
- 2 Multi-Ride Commuter Card -- Vehicle & Driver
- 3 Senior / Disabled Fare -- Vehicle & Driver
- 4 Something Else → Please describe

CAPITAL FUNDING

C1a. **Operational funding** is used to pay for daily costs such as fuel, wages, and the day-to-day general maintenance of the boats and terminals. 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?

(a)	(b)	(c)	(d)	(e)
WSF operations is 100% funded by rider fares	WSF operations is funded by both taxpayers and riders, with riders contributing the majority (more than two-thirds) of the funding	WSF operations is shared approximately equally (50/50) between funding by taxpayers and riders	WSF operations is funded by both taxpayers and riders, with taxpayers contributing the majority (more than two-thirds) of the funding	WSF operations is 100% funded by taxpayers
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Questionnaire (cont.)

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?

- 1 Support comes primarily from local taxes in ferry communities
- 2 Support comes primarily from statewide vehicle registration taxes
- 3 Support comes primarily from statewide gas tax
- 4 Support comes both from taxes collected statewide and local ferry community taxes
- 5 Support comes for the Statewide lotto funds
- 6 Support comes from other sources → Please specify
- 7 Don't know

C2a. Capital funding is used for major overhaul and the preservation of boats and terminals as well as for the building of new boats and terminals.

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 it money for capital funding?

(a)	(b)	(c)	(d)	(e)
WSF capital needs are 100% funded by rider fares	WSF capital needs are shared between taxpayers and riders, with riders contributing the majority (more than two-thirds) of the funding	WSF capital needs are shared approximately equally (50/50) between funding by taxpayers and riders	WSF capital needs are shared between taxpayers and riders, with taxpayers contributing the majority (more than two-thirds) of the funding	WSF capital needs are 100% funded by taxpayers
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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?

- 1 Support comes primarily from local taxes in ferry communities
- 2 Support comes primarily from statewide vehicle registration taxes
- 3 Support comes primarily from statewide gas tax
- 4 Support comes both from taxes collected statewide and local ferry community taxes
- 5 Support comes primarily from Federal income taxes
- 6 Support comes for the Statewide lotto funds
- 7 Support comes from other sources → Please specify
- 8 Don't know

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

- 1 A major problem requiring immediately action;
- 2 A major problem, but one that can be addressed over the next 2 – 5 years;
- 3 A moderate problem, but one that can be address over the next 6 – 10 years;
- 4 A moderate problem for which a 10 year plus plan should be developed;
- 5 A minor problem that can be dealt with on a year to year basis; or
- 6 Not a problem, there is plenty of money available for capital needs?
- 7 Don't know/not sure

C4. How much do you agree or disagree with each of the following statements? (PLEASE ALTERNATE SHADING IN ROWS)

Completely Agree	Somewhat Agree	Somewhat Disagree	Completely Disagree	Don't know
4	3	2	1	7

- A. The existing ferries are in need of major repairs or replacement.
- B. The ferry system is in need of more capacity/more boats/more sailings.
- C. There are ferry terminals that need to be enlarged and/or redesigned to provide more efficient service.
- D. Many of the current service interruptions (reduction in sailings because the regular boat is not in service) are the result of the lack of WSF lack of capital funding.

C5. → If C4B is rated "3" or "4": What specific routes, if any, do you feel need more boats?

(SHOW LIST OF ROUTES)

C6. → If C4C is rated "3" or "4": What specific routes, if any, do you feel need enlarged and/or redesigned terminals to provide more efficient service?

(SHOW LIST OF ROUTES)

C7. Do you think funds for ferry capital funding are ever diverted to cover operating costs (such as fuel, wages, and the day-to-day general maintenance of the boats and terminals)?

- 1 Yes, all of the time
- 2 Yes, though not all of the time
- 3 Yes, but only when there are major unplanned increases in operating costs, such as sudden increases in fuel costs
- 4 No, never
- 5 Don't know

C8. How many, if any, spare boats do you think WSF has in the fleet to use when a primary boat goes in for service or is down for any reason?

Boats	
00	None
97	Don't know



Questionnaire (cont.)

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...

- 1 Probably exaggerated;
- 2 Probably accurate; or
- 3 Probably understated?
- 7 Don't know

SYNOPSIS OF CAPITAL FUNDING SITUATION

Below is a short synopsis of WSP's long-term capital funding needs based upon the Long-Range Plan submitted to the Legislature in 2009. Please read this before moving on to the next set of questions as those questions may reference the information below.

- The Long-Range Plan indicates that the current manner of funding WSF operational & capital needs is unsustainable on a long-term basis.
- Between now and 2030, capital funding needs are \$3.1 billion above and beyond current funding levels and operational needs are \$500 million more than current funding levels.
- This funding shortfall represents an annual capital funding gap of approximately \$190 million and an annual operational funding gap of approximately \$22 million per year. As a result, more than \$210 million per year is needed to meet the financial requirements of the Long-Range Plan.
- The single largest unfunded capital need is the purchase of new vessels to replace old vessels scheduled for retirement over the next several years, and to provide for a spare vessel to be used in cases of unanticipated service disruptions.
- Another way of looking at this is that WSF needs to put a new boat in service approximately every 2 years. (For context, WSF has acquired 3 new vessels over the last 20 years - not including the three 64 car ferries currently being acquired.)
- Given that fares currently cover 65% of WSF's total operating costs, the remaining 35% has been paid for with a state subsidy from gas tax revenues.

The current Long-Range plan for WSF adopted in 2009 describes a future for WSF that includes:

- o A focus on managing future demand through operational and pricing strategies.
- o Maintaining current service levels, with very modest capacity improvements related to the vessel replacement plan where half of the new vessels will offer a marginal increase in vehicle capacity over the vessel that they replaced.
- o A capital funding emphasis that places a priority on vessel replacement and capital preservation - very modest terminal enhancements are planned.

CAPITAL FUNDING OPTIONS

There are a number of different potential revenue sources to address the capital funding shortfall. We would like you to give us your opinions on some of the possible options.

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?

(ROTATE ORDER)

- _____ % A. Increasing ferry fares (to cover a larger percentage of the daily operating costs)
- _____ % B. Establishing local taxes in ferry-served communities dedicated to helping pay for ferry capital needs (i.e. new local taxes in King, Snohomish, Pierce, Clallam, Island, Jefferson, Kitsap, San Juan, and Skagit counties)
- _____ % C. Lowering operating costs by reducing services through either fewer sailing and/or fewer routes
- _____ % D. Increasing Statewide taxes such as the gas or sales taxes
- _____ % E. Other → Please specify

997 Don't know

C11. Which of the following funding methods, if any, would you recommend be used to fund the capital needs of the ferries? Please check as many as you like.

- 11 Increase the statewide sales tax
- 12 Increase the statewide gas tax
- 13 Establish a new statewide tax dedicated to funding ferry capital needs
- 14 Increase vehicle registration fees
- 15 Establish a new tax in Western Washington ferry served communities
- 16 Other → Please specify
- 98 None of these
- 97 Don't know



Questionnaire (cont.)

C12. How supportive, if at all, would you be of... (PLEASE ALTERNATE SHADING IN ROWS)

	Would not Support at all			Would completely support				Don't know
	1	2	3	4	5	6	7	
A.	An increase in the statewide sales tax to fund statewide transportation needs including ferry capital costs							
B.	A new annual statewide tax on the value of a vehicle to fund statewide transportation needs including ferry capital costs							
C.	An increase in the statewide gas tax to fund statewide transportation needs including ferry capital costs							
D.	An increase in annual vehicle registration fees to fund statewide transportation needs including ferry capital costs							
E.	A surcharge on all ferry fares to go specifically into a ferry capital fund dedicated to building new and replacement ferries and improving ferry terminals							
F.	An increase in annual statewide vehicle weight fees to meet statewide transportation needs including ferry capital costs							
G.	An additional transportation tax on new vehicle sales to fund statewide transportation needs including ferry capital costs							

ROLE OF FARE REVENUE IN CAPITAL FUNDING SOLUTIONS

Given that fares cover 65% of WSP's operational costs, another way to address capital funding needs would be to raise fares to cover a higher percentage of daily operations so that the current 35% state subsidy could be used to fund WSP's capital needs. The following are some possible ways this could occur and we would like to get your opinion on them.

C13. Currently fares cover two-thirds (approximately 65%) of daily operations costs and statewide gas taxes subsidize the remaining 35%. To free up those statewide gas tax dollars to cover capital needs, how much, if any, would you suggest fares be increased to cover more of the daily operating costs?

- 1 None (leave them at 65% of daily costs)
- 2 A little (let them rise to 70% of daily costs)
- 3 Somewhat (let them rise to 75% of daily costs)
- 4 Considerably (let them rise to 80% of daily costs)
- 5 A lot (let them rise to 90% of daily costs)
- 6 All the way (let them rise to 100% of daily costs)
- 7 Don't know

C14. → IF C13 RESPONSE IS 2-6 ASK: You mentioned that fares should increase [INSERT C13 RESPONSE HERE] to free up more statewide gas tax dollars to cover capital needs. How much do you believe it would be reasonable for fares to increase each year in order to achieve that goal over time?

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

- 1 1% per year
- 2 2% per year
- 3 3% per year
- 4 4% per year
- 5 5% per year
- 6 6% per year
- 7 7% per year
- 8 8% per year
- 9 9% per year
- 10 10% per year
- 11 Other % → Please specify
- 12 Don't Know

C15. How supportive, if at all, would you be of... (PLEASE ALTERNATE SHADING IN ROWS)

	Would not Support at all			Would completely support				Don't know
	1	2	3	4	5	6	7	
A.	Changing the multi-ride ticket such that it is always priced 20% less than a single fare Ticket, if it helps generate funds for capital improvements? (Currently multi-ride tickets are 20% lower than single fare in the winter (25% in the San Juans) and 35% lower than single fare in the summer (45% in the San Juans))							
B.	Charging an additional \$0.10 per fare with the monies collected going into a dedicated fund for ferry capital improvements (boats and terminals)							
C.	Charging an additional (INSERT ADDITIONAL AMOUNT BASED ON ROUTE AND FARE TYPE) per vehicular ticket and 50¢ per passenger ticket to go to a fund dedicated to building new and replacement ferries and improving ferry terminals							

FARES	SEA/ BAIN	SEA/ SRE	PTD/ TAH	SDM/ NIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ NEY	MUN/ CLI	ANA/ FRI	ANA/ LOPEZ	ANA/ ORC- SHAW	INTER ISLAND
Regular fare	\$11.95	\$11.95	\$15.20	\$11.95	\$15.20	\$9.15	\$15.20	\$9.15	\$7.00	\$29.90	\$27.25	\$22.70	\$17.95
Regular add'l	1.50	1.50	1.75	1.50	1.75	1.25	1.75	1.50	1.25	3.00	3.00	3.00	1.75
Multi-ride	\$9.48	\$9.48	\$12.16	\$9.48	\$12.16	\$7.32	\$12.16	\$7.32	\$5.60	\$19.14	\$16.44	\$14.52	\$14.26
Multi add'l	1.50	1.50	1.75	1.50	1.75	1.25	1.75	1.50	1.25	3.00	3.00	3.00	1.75
Senior/Disabled	\$10.10	\$10.10	\$12.95	\$10.10	\$12.95	\$7.80	\$12.95	\$7.80	\$5.95	\$22.20	\$21.65	\$17.10	\$17.95
sr/ndcap add'l	1.25	1.25	1.50	1.25	1.50	1.00	1.50	1.25	1.00	2.75	2.75	2.75	1.50

Anacortes/San Juans-Sidney: \$5.00 add'l regular fare; \$4.75 add'l senior/disabled. No multi-ride fares on this route.



Questionnaire (cont.)

C15D. At present, vehicles over 20' are charged a higher fare. How supportive would you be of starting the higher fare at a shorter vehicle length, in order to reduce the need for more or larger boats?

Would not <u>Support at all</u>						Would completely <u>support</u>	Don't <u>know</u>
1	2	3	4	5	6	7	8

- A. A 25% higher fare charged on vehicles over 14' such as 4-door passenger cars (e.g., Hyundai Elantra, Toyota Corolla, Dodge Caliber, Honda Civic, Nissan Sentra, etc.), SUVs, pickup trucks, mini-vans, etc.
- B. (IP NOTE IF C15DA = 6 OR 7 THEN SKIP TO C16) A 25% higher fare charged on vehicles over 16' such as luxury sedans (e.g., BMW 7 series, Cadillac STS, Chrysler 300, etc.), full size SUVs, full size pickup trucks and mini vans.

C16. What additional feedback or suggestions do you have for how to improve the ferry system and specifically the future capital funding issues?

88 No additional feedback
 99 Yes → _____

END SCREEN

Dear (INSERT FIRST NAME FROM PROFILE OR FIRST NAME FROM MDC WEB SURVEY OF NON-PANELIST OR Wa.State Ferry Rider – IF BOTH FIRST NAMES ARE BLANK):

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

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

Again, thank you.