



market decisions
CORPORATION

2012 Customer Survey Presentation

Winter and Summer Surveys

*Part of the Washington State Transportation
Commission 2012 Ferry Research Initiative*



**Washington State
Transportation Commission**

Conducted by
Market Decisions Corporation



Preface

- ❖ In 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). In the past, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (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). Since 2010, all WSTC research has been conducted using the FROG panel.
- ❖ The research initiative in 2012 consisted of the following main phases:
 - Winter Customer Survey (target audience: FROG panel members only)
 - Summer Customer Survey (target audience: FROG panel members & recreational/social riders)
- ❖ The main objective of the 2012 research initiative was to understand from the ferry riders' perspective their travel behavior, opinions and attitudes regarding important issues currently facing WSTC and WSF.
 - This overall objective resulted in the following areas of exploration:
 - Winter and Summer travel activity
 - Customer satisfaction - measure importance and satisfaction of terminal conditions, walk-on and transit services, toll booth interactions, loading and unloading procedures, vessel conditions, vessel crew interactions, on-time arrival and departures and WSF website and telephone services.
 - Fare structures
 - Demographic characteristics of ferry customers - travel patterns, WSF satisfaction and demographic data.
- ❖ A total of 2,890 riders completed the 2012 Summer Customer Survey between September 6, 2012 and September 24, 2012, yielding a maximum sample variable of $\pm 1.8\%$ at the 95% confidence level.
- ❖ A total of 1,754 riders completed the 2012 Winter Customer Survey between May 3 and May 15, 2012, yielding a maximum sample variable of $\pm 2.3\%$ at the 95% confidence level.

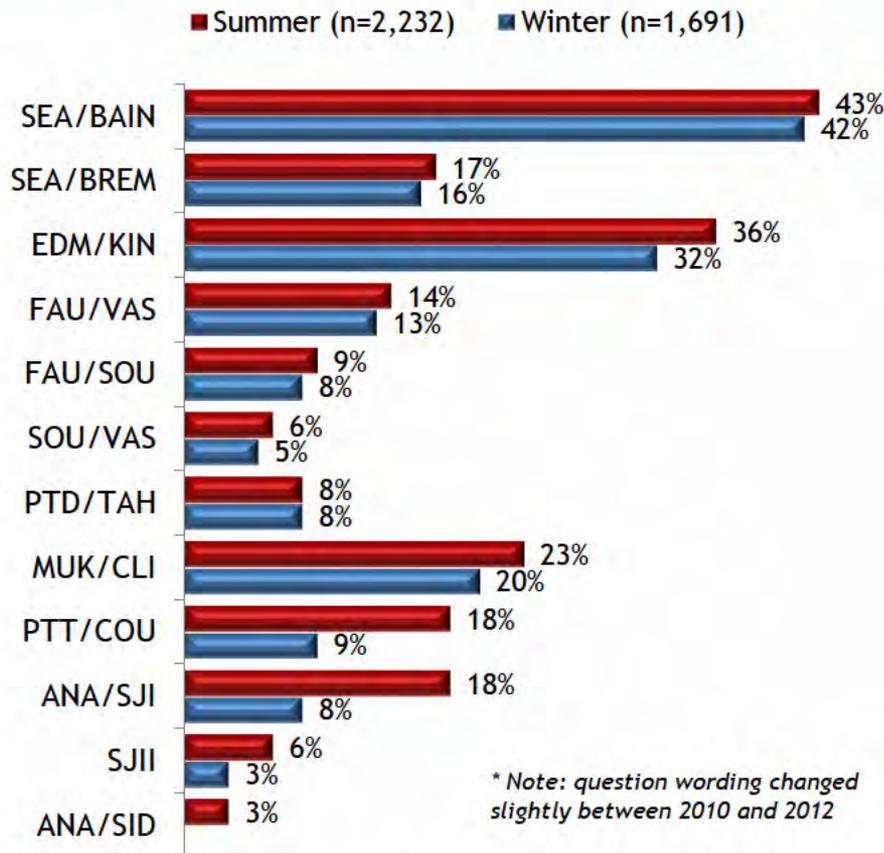


Shared Metrics



Winter Period Ridership - Overall

Overall Ridership



■ Decrease of 2+ trips/month

Summer 2010	Winter 2010	Avg. # of trips per month per rider - 2012	
		Summer	Winter
38%	38%	10.1	12.5
16%	16%	8.6	12.7
34%	32%	5.0	6.5
12%	13%	11.4	12.9
7%	6%	8.2	13.0
5%	4%	2.8	7.3
7%	9%	5.4	6.1
21%	21%	11.1	12.3
15%	10%	1.9	2.6
17%	8%	3.3	4.6
%	3%	2.7	5.0
2%	--	1.1	--

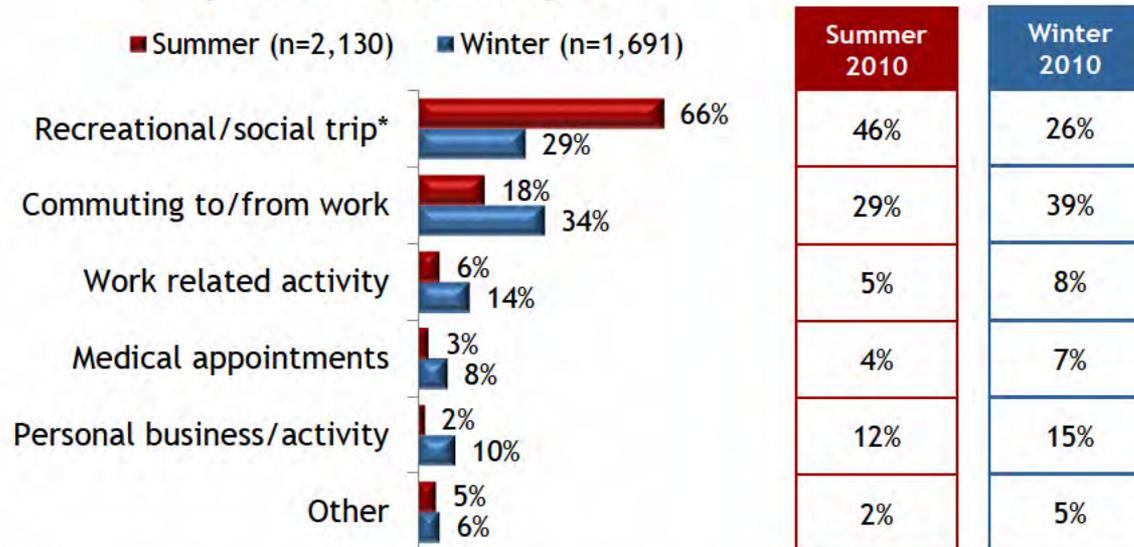
- Q21 To get an idea of how people are using the ferry system in the summer months, which of the following route(s) have you ridden for any purpose during the Summer/Winter period?
- Q22 Could you please give us an estimate for the routes shown below - how many round trips (2 one-way trips = 1 round trip; 3 one-way trips = 2 round trips) per month did you take during the Summer/Winter period?



Purpose of Last Ferry Ride

- ❖ Travel during the Summer and Winter periods continues to vary dramatically, with regards to commuting vs. recreational trips.
 - During the Summer survey, the majority (66%) say the last recreational/social trip they took was also their most recent ferry trip.
 - Please note that the question sequencing and logic was changed between the Winter and Summer periods, which may explain the large discrepancy of recreational riders.

Purpose of Last Ferry Ride

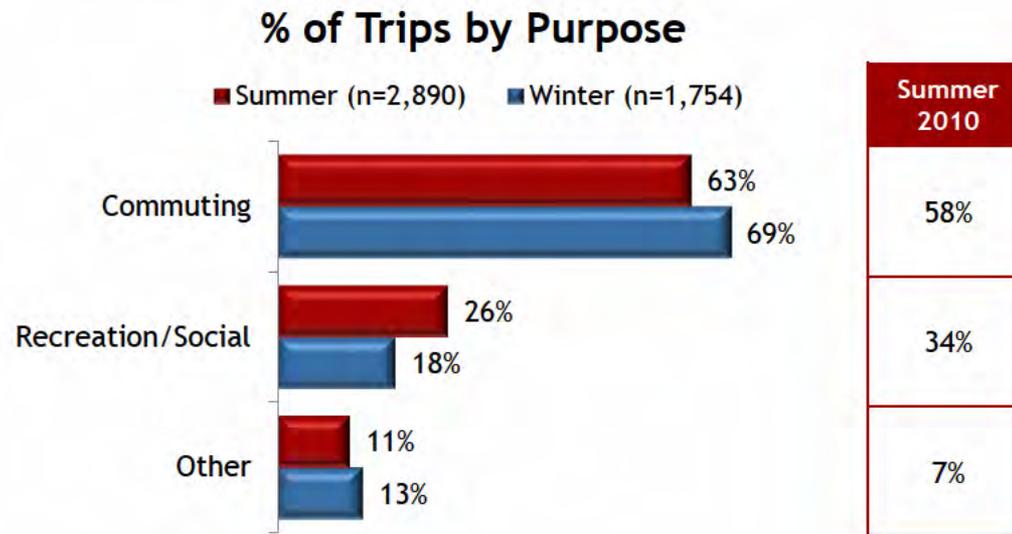


Q33 Thinking about your LAST FERRY RIDE ONLY on the {INSERT Q31 NAME HERE} route, which of the following was the PRIMARY PURPOSE for that specific trip?



Ratio of Trips by Purpose

- ❖ The distribution of commuting trips compared to recreational trips confirms the heavier recreational traffic WSF sees during the Summer period, with one in four traveling for this purpose.
 - However, this number has fallen considerably compared to the Summer period survey of 2010. In 2010, the question sequencing was slightly different, with only commuting and recreational/social trips asked specifically.



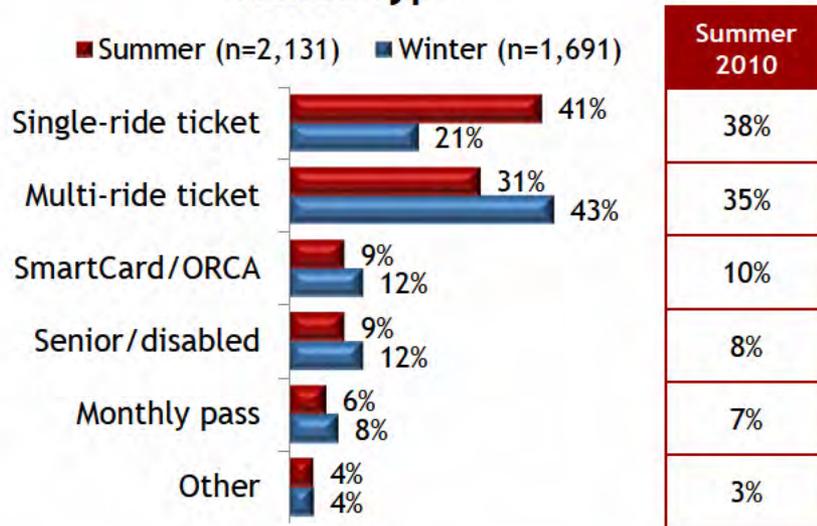
Q23 How many of those round trips, for each route, were for the primary purpose of commuting (getting to and from work/school), how many were for primarily recreational/social purposes (seeing friends/going to events/tourism, etc.) and how many were for other purposes (shopping, medical appointments, etc.)?



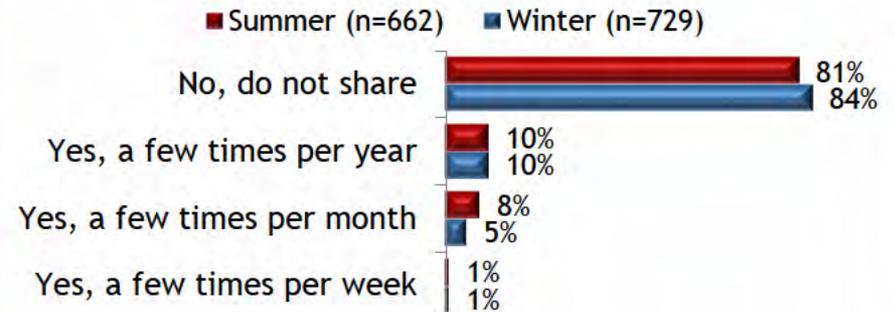
Ticket Used on Last Ferry Ride

- ❖ Due to the difference in ridership purpose (commuting vs. recreational/social), Summer riders are most likely to use single ride tickets while Winter riders utilize multi-ride tickets.
- ❖ Of those using a multi-ride ticket, the vast majority report never sharing the ticket with someone under the age of 19.

Ticket Type



Multi-Ride Ticket Sharing



Q37 Finally, thinking about your LAST FERRY RIDE ONLY on the {INSERT Q31 NAME HERE} route, on what kind of ticket were you travelling on?

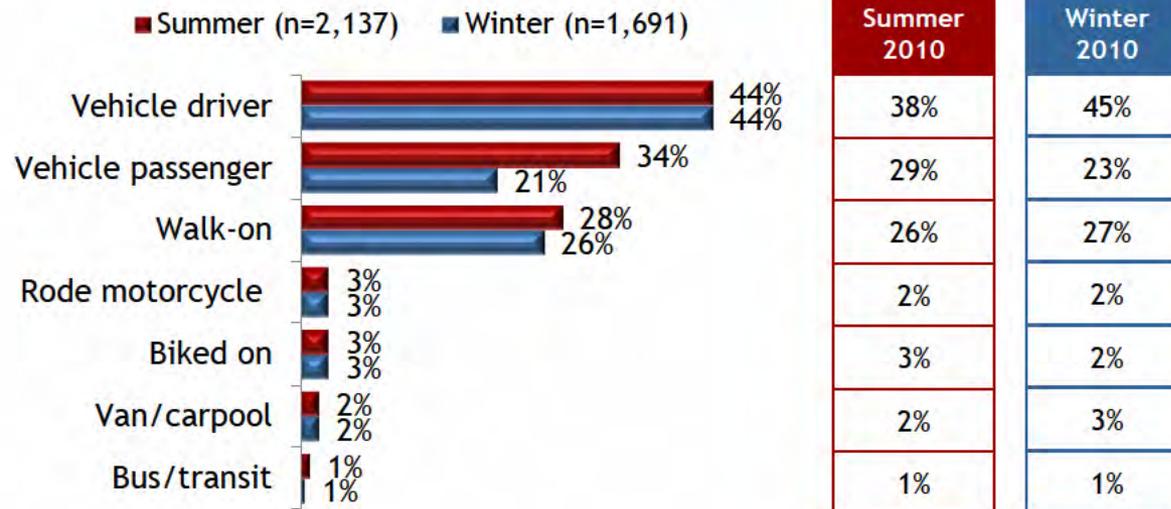
Q38 Do you share your multi-ride card with anyone under the age of 19?



Boarding Method of Last Ferry Ride

- ❖ Overall, the majority of riders board the ferry in a vehicle, either as a driver or passenger.
- ❖ Even more so than in 2010, Summer riders are more likely to board as a vehicle passenger than those riding in the Winter.
 - In 2012, the percentage of Summer riders boarding as a vehicle driver matched the Winter period, after trailing by 7pp in 2010.

Boarding Method of Last Ferry Ride

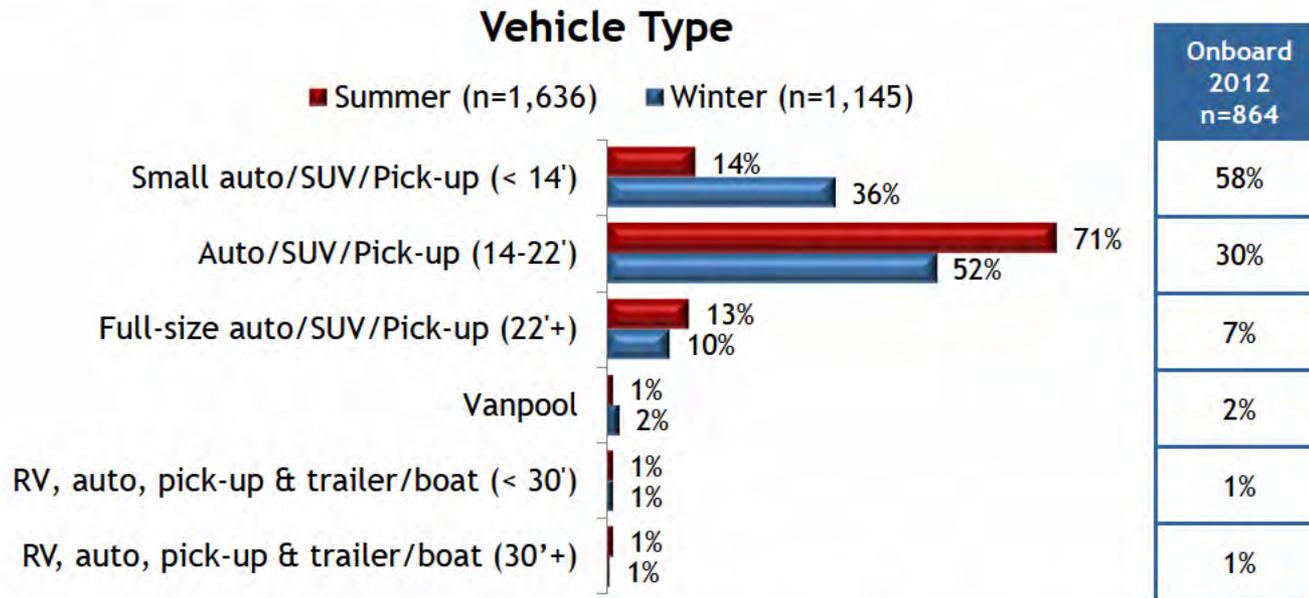


Q34 Thinking about your LAST FERRY RIDE ONLY on the {INSERT Q31 NAME HERE} route, were you the vehicle driver, a passenger in a vehicle, or did you walk-onto the ferry?



Vehicle Drove on for Last Ferry Ride

- ❖ Of those boarding the ferry in a vehicle, most did so in an auto, SUV or pick-up between 14-22' in length.
 - This is especially true of Summer riders, as Winter riders are far more likely to board in a smaller (<14') vehicle.
 - Please note differences between the FROG panelist data and onboard surveys may be attributed to the fact that FROG members were shown examples of vehicles included in each length category, while onboard surveys did not include these example vehicles.

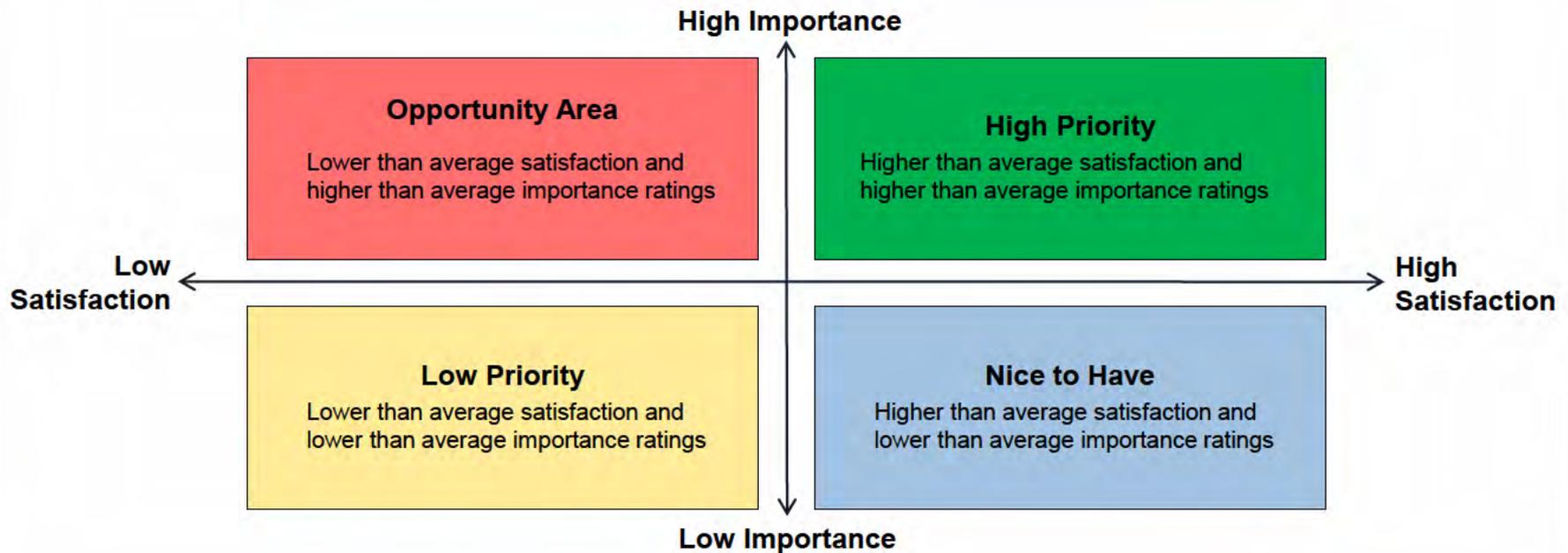


Q35 Thinking about your LAST FERRY RIDE ONLY on the {INSERT 31 NAME HERE} route, which of the following best describes the vehicle you drove on the ferry?



Ratings by Route & Dissatisfaction

- ❖ The following slide presents an overview of the wide array of ferry attribute features studied during both the Winter and Summer surveys. Top-box ratings (4-5 on 5-point scale) are shown for each.
- ❖ In addition, cell shading denotes the quadrant in which each attribute falls based on rated importance vs. satisfaction, and is outlined in the chart below.





Gap Analysis Summary Overview

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



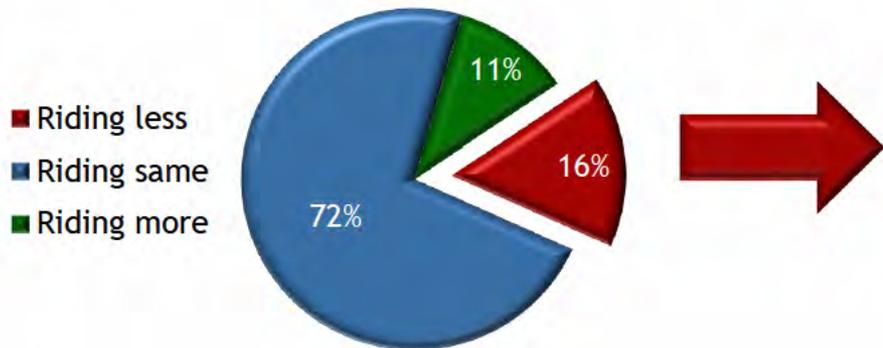
Winter Customer Survey



Change in Ferry Ridership

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

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



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

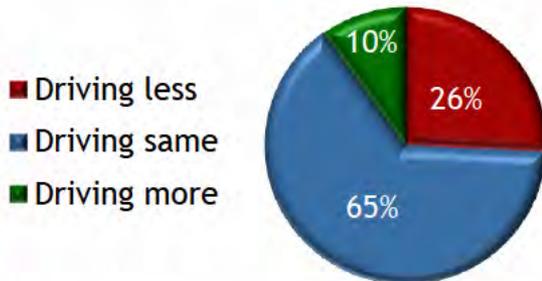
Q4 Compared to one year ago (Winter January-March 2011), would you say you personally...
Q5 Why do you ride the ferries less now?



Expected Change in Ferry Ridership

Driving Habits Compared to a Year Ago

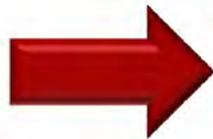
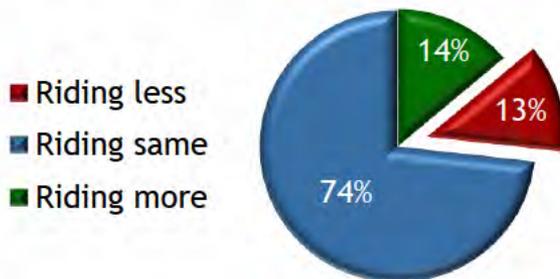
(n=1,691)



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

Expected Ridership in Next 2 Years

(n=1,754)



Top Reasons for Lower Expected Ridership

n=220

Plan to move to a location that doesn't require as much ferry travel	23%
Expensive/raising rates	20%
Less need to travel due to life circumstances	14%
Plan to retire	13%
Plan to telecommute/will telecommute more	12%
Plan to change jobs to a location that doesn't require as much ferry travel	8%

Q6 Looking forward 2 years, how would you guess your ferry ridership will change, if at all?

Q7 What is the main reason you anticipate you will ride the ferries less in the next 2 years?

Q9 Thinking for a moment about your overall driving habits this last year on ALL ROADS AND HIGHWAYS, would you say you are...

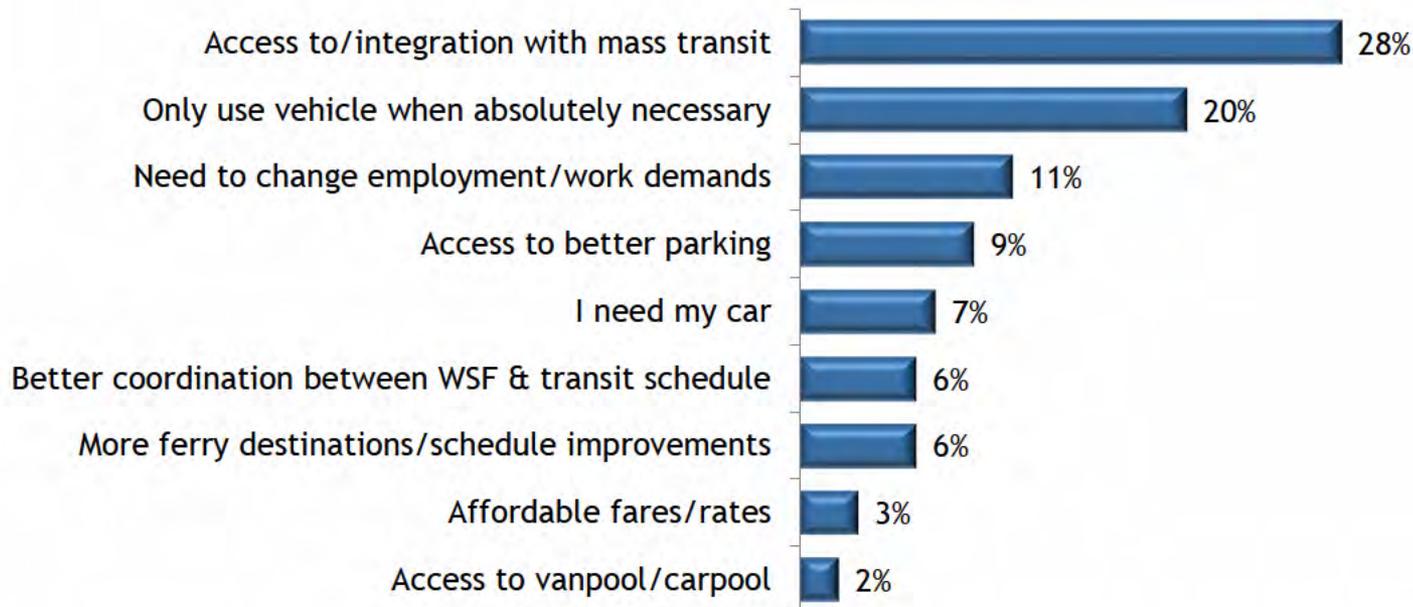


Ways to Increase Walk-On

- ❖ Among commuters, **access to, or integration with, mass transit** is the main change that could influence riders to drive on less and walk on more for commuting trips.
 - One in five say they always walk on, using their vehicle only when absolutely necessary.

Changes to Influence More Walk-On Commuting

Among Commuters
(n=912)



Q56 What would have to happen for you to drive on less and walk on the ferry more for all or some of your commuting trips?

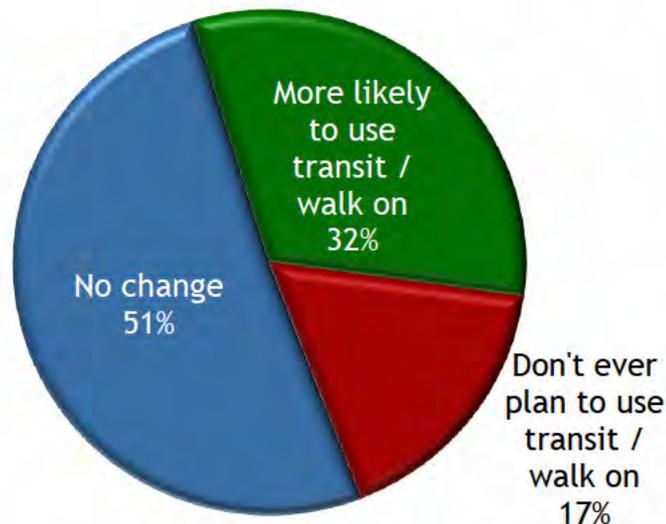


Combined Transit Tickets & Fare Discounts

- ❖ Half say a combined ferry & transit fare discount via the ORCA Card would have no change on their use of public transportation; one third would be more likely to use transit and walk on.
- ❖ One third would be at least somewhat more likely to walk on if they received a 30% discount on a combined ferry/bus ticket.

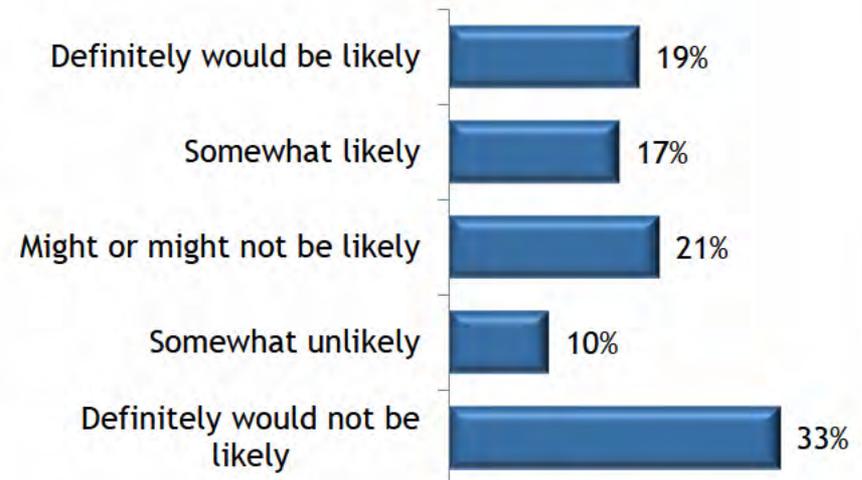
Impact of Combined Fare Discount

(n=1,754)



Impact of 30% Ferry/Bus Discount

Among Those Driving On
(n=1,465)



- Q60 Would you be more likely to use transit and walk onto the ferry if you got a discount on both your ferry fare and transit pass when used in combination via the ORCA Card?
- Q61 How likely would you be to walk onto the ferry instead of driving on, if you received a 30% discount on a ferry/bus combined ticket?

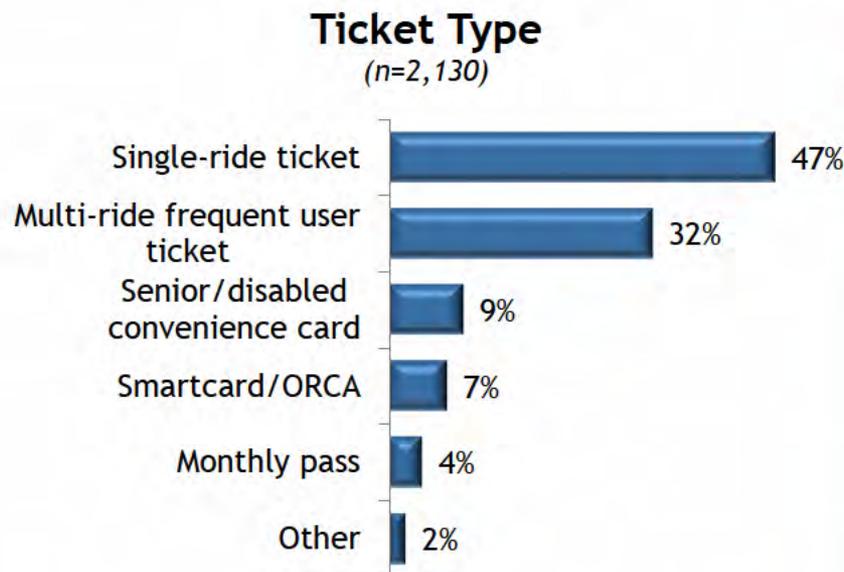


Summer Customer Survey



Recreational Ticket Type

- ❖ Nearly half of recreational/social riders traveled on a single-ride ticket during the summer period, while one third used a multi-ride frequent user ticket.
 - With the majority (66%) saying their most recent recreational/social trip was also their last ferry ride, recreational/social ticket type mirrors overall Summer period data, with a slightly higher frequency of single-ride ticket use.



Total Last Ferry Ride 20120	
Summer	Winter
41%	21%
31%	43%
9%	12%
9%	12%
6%	8%
4%	4%

Q8 *Thinking about your last ferry ride only for social or recreational purposes, what kind of ticket were you travelling on?*
Q9 *Do you share your multi-ride card with anyone under the age of 19?*



Destination & Relative Ferry Cost

- ❖ The vast majority stayed within Washington State on their last recreational/social trip which involved the ferries.
- ❖ The relative price of ferry fare compared to the overall cost of the recreational/social trip varies, with 40% saying the fare accounted for more than 25% of the total cost.
 - Ferry cost is less of a factor among respondents surveyed onboard the ferries, with nearly half saying ferry fare accounted for less than 10% of the total trip cost.

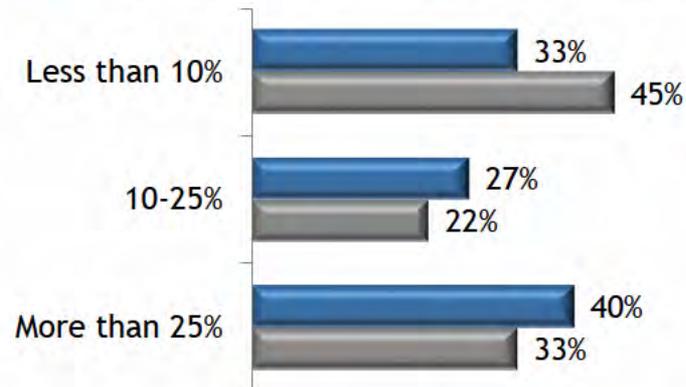
Destination of Last Recreational/Social Trip
(n=2,129)

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



Relative Cost of Last Recreational/Social Trip

■ FROG (n=2,127) ■ Onboard 2012 (n=1,709)



Cost 2010
33%
27%
41%

Q13 Was your most recent recreational or social trip part of a ...

Q14 How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent recreational or social trip?



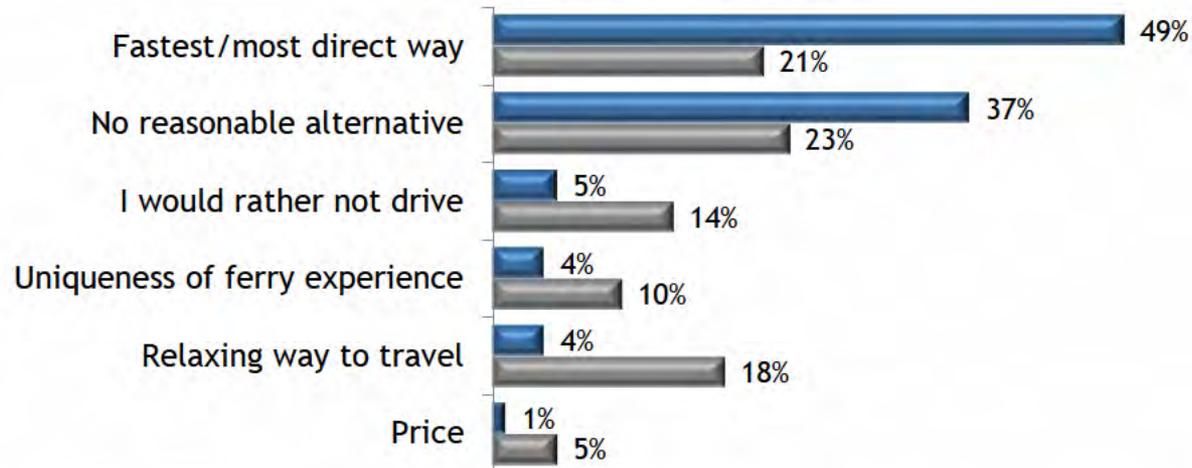
Factors Driving Ferry Decision

- ❖ Riders are most likely to utilize WSF for recreational/social trips because it is the fastest and most direct way to their destination.
 - On a secondary level, riders enjoy the ferry experience, saying it is a relaxing way to travel or they would rather not drive.

Factors Determining Ferry Travel

(n=2,136)

■ Most important ■ Secondary



Most Imp. Onboard 2012 n=1,707	Most Imp. Factor 2010
35%	45%
26%	41%
8%	6%
16%	3%
7%	4%
7%	1%

Q15A Which of the following reasons best describes why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?

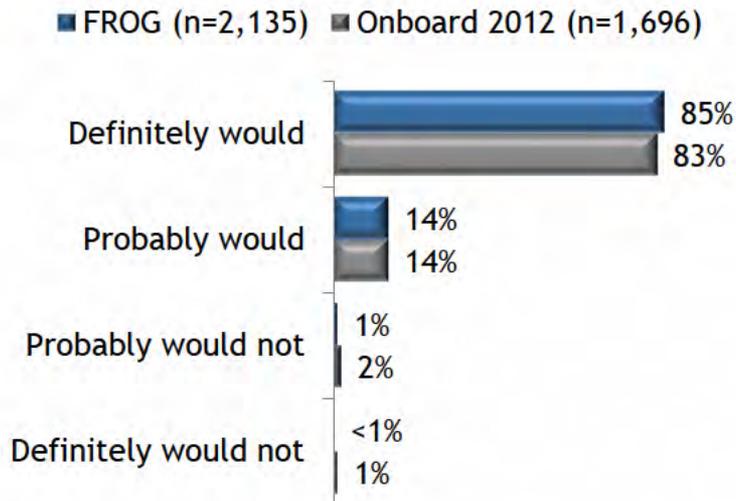
Q15B. Which other reasons describe why you chose Washington State Ferries rather than some other way to make your most recent recreational or social trip?



Future Recreational/Social Use

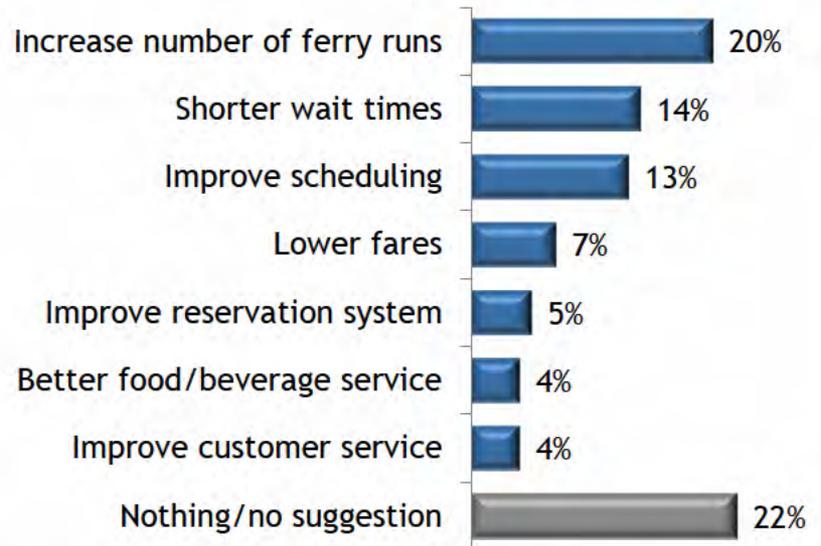
- ❖ Nearly all recreational/social riders say they “definitely would” be likely to consider using WSF again for other recreational/social trips.
- ❖ When asked what changes could influence more recreational/social trips using WSF, riders mention an increase in the number of runs, shorter ferry wait times and improved scheduling.

Future WSF Use



Influencing More Recreational Use

(n=1,585)



Q16 How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...

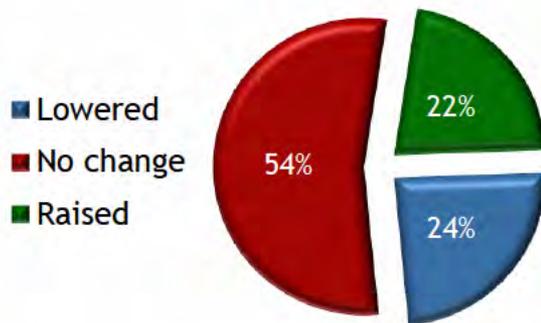
Q18 Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social trips that people, like you, make in a year?



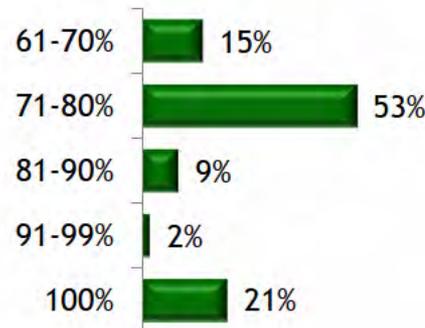
Fare Coverage of Operating Expenses

- ❖ Half believe the current fare coverage structure is adequate and should not be changed, in which fares account for 65% of the ferries' operating costs.
 - Of those that believe this rate should be increased, half say a coverage rate of 71-80% is preferred.
 - Of those that say the rate should be lowered, half agree a coverage rate between 41-50% is acceptable.

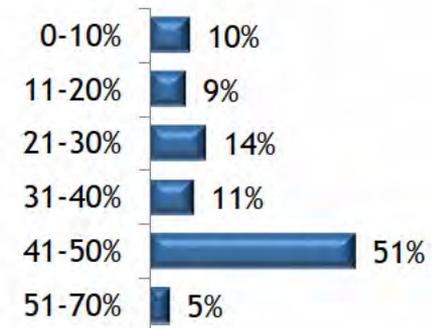
Rider-Paid Operating %
(n=2,888)



Increasing Rider-Paid %
(n=627)



Decreasing Rider-Paid %
(n=703)



Q73 Currently, fares pay for 65% of the cost of operating the ferries. Given the state budget, this means money for road maintenance and constructions must be used to keep the ferries operating. Should the rider paid percent of 65% be raised, lowered or stay the same?

Q73A/B What percent should it be [raised/lowered] to?