



**Washington State Transportation Commission**  
**Ferry Riders Opinion Group (FROG) Survey Panel**  
**January 2019 WSF Policy Study**  
**Final Report**

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# Methodology



- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG) survey panel.
- ▶ A total of 5,141 surveys were completed in January 2019 (January 12 – January 28, 2019) with riders that had taken a WSF in the last 12 months.
- ▶ Data was weighted by route according to the June 2018 WSF traffic report, based on the last trip taken.
- ▶ Total & sub-group sample sizes and definitions:

	<b>Sample</b>	<b>Graph Name</b>	<b>Definition</b>
•	5,141	Total	Total number of completed surveys system-wide
•	1,300	Vehicle Only	Riders who only boarded the ferry in a vehicle in last 12 months
•	3,704	Multi-modal	Riders who boarded by both vehicle and another mode in last 12 months
•	3,681	Walk-on	Riders who boarded on foot in last 12 months
•	450	Bike-on	Riders who boarded a ferry by bicycle in last 12 months
•	429	Transit	Riders who boarded via transit / bus / shuttle in last 12 months
•	291	Motorcycle	Riders who boarded via motorcycle in the last 12 months
•	91	Registered Carpool	Riders who boarded in a registered van / car pool in last 12 months
•	967	Do train / Bus	Riders who already do a train / bus in combination with the ferries
•	1,571	Might do train / bus	Riders who feel the could / might do train / bus and ferries
•	4,792	Vehicle Drivers	Boarded ferry as vehicle drivers in last 12 months
•	3,525	Vehicle Passengers	Boarded ferry as vehicle passenger in last 12 months



# Executive Summary



## FERRY FUNDING ISSUES:

- ▶ When asked to select a preferred funding source for long-term capital needs from a list of options, “Establishing a new tax in Western Washington ferry served communities” (26%) and “Increase the statewide gas tax” (25%) received the most mentions. They are followed by “Establish a new statewide tax dedicated to funding ferry capital needs” (23%) and “Increase vehicle registration fees” (21%).
  - Seven percent (7%) do not feel WSF has a funding problem and 12% are not sure which source to recommend.
- ▶ Establishing a new tax in Western WA ferry served communities tends to be mentioned more often by Seattle/Bremerton (32%) as well as Fauntleroy/Southworth (30%) riders and least often by Anacortes/Sidney B.C. (18%) riders.
  - Increasing the statewide gas tax tends to be mentioned more often by riders on the San Juan routes.
- ▶ Without any further information, riders system-wide would be willing to increase the current \$0.25/ticket ferry surcharge and pay, on average \$0.59 per ticket provided the funds continue to be dedicated to new ferries.
  - Five percent said they would pay zero (they wanted to get rid of the current \$0.25/ticket surcharge).
- ▶ After reading a short statement about what the current \$0.25 surcharge raises and the cost of a new 144 class ferry, six in ten (63%) said they would support increasing the surcharge.
  - In contrast 12% said no and 25% said it depended on the amount of the surcharge.
- ▶ With the above statement, riders systemwide would on average be willing to pay a surcharge of \$0.73 per ticket provided the funds continue to be dedicated to new ferries.
  - Most notable the \$0.00 and \$0.25 levels dropped while all other amounts increased from their pre-statement figures.



## IMPACT OF PASSENGER TO VEHICLE FARE INCREASE DIFFERENTIAL:

- ▶ One in four (23%) riders systemwide feel the impact of lower increases in passenger fares has encouraged their walk-on behavior.
  - One in three (36%) riders systemwide were not aware of the percentage difference in fare increases.
- ▶ Only 5% of those riders who currently only drive on (who board as driver or passenger and don't use any other boarding mode) said they were encouraged to walk on given the differential in fare increases.
  - In comparison, three in ten walkers (30%) and commuters (28%) said the differential in fare increase did encourage them to walk on.
- ▶ About one in three systemwide (36%), and in each route used (high of 40% on Fautleroy/Southworth to low of 33% on San Juan Interisland) as well as by mode (high of 44% for Bike-on riders to a low of 29% for Car/Van pool riders) were not aware of the percentage difference in fare increases.

# Executive Summary



## SUGGESTED SERVICE IMPROVEMENTS:

- ▶ When 5,141 WSF riders systemwide were asked which of four broad issues or projects they felt WSF should focus on to improve its service, one in three (32%) said “Expand service / schedules for current routes” followed by “Build new ferries” (21%).
  - “Improve terminal facilities and restructure fares” was cited by one in ten as was the response of “Focus on all of them.”
  - Vashon Island riders (40%) were most supportive of the expand service option.
  - Least likely to mention expand service is Anacortes/Sidney B.C. (26%) and San Juan Interisland (25%).
  - When the results are broken out by the mode, riders have used in the last 12 months, the data finds transit riders (38%) wanting expanded service more than average (32%) and those that only drive onto a ferry in a vehicle (29%) or registered carpool (27%).
- ▶ Looking at the build new ferries option, the San Juan routes (38% SJ Interisland, 35% Anacortes/Sidney B.C. 30% Anacortes/San Juan) exceed the systemwide average of 21% who suggested the build new ferry option.
  - Least likely to mention build new ferries is the three direct Vashon routes (13% Point Defiance/Tahlequah to 15% Fautleroy/Vashon & Southworth/Vashon).
  - When the results are broken out by the mode riders have used in the last 12 months, the data finds those that currently only drive on in a vehicle (no other boarding mode used) suggest the build new ferries option slightly more (26%) than the systemwide average (21%). In comparison, transit riders (11%) were least likely to suggest this option.

# Executive Summary



## POTENTIAL AMENITIES DESIRED:

- ▶ The 5,141 riders ranked thirteen potential amenities from top priority to do not care about it. The top three highest ranked potential amenities systemwide were “free Wi-Fi” (49% gave it a top-priority or high-priority rating), “park & ride lots” (41% top/high priority) and “designated terminal pickup / drop-off area” (39% top/high priority).
  - The next group were “ability to use Good to Go account” (37% top/high priority) “overhead walkways for walk-ons” (34% top/high priority), and “charging stations for personal electronics” (23% top/high priority)
  
- ▶ The 13 amenities varied considerably when broken out by the boarding mode that riders used.
  - The top tier amenity for riders who only drive onto a ferry is “free Wi-Fi” (44%). Second tier amenities are “ability to use Good to Go account” (33%), “park & ride lots” (32%), and “designated terminal pickup and drop-off areas” (26%).
  - The top tier desired amenities for multi-modal riders (those who both drive onto a ferry as well as use other boarding modes) are “free Wi-Fi” (50%), “park and ride lots” (44%), and “designated Terminal Pickup & drop-off areas” (41%). Second tier amenities are “ability to use Good to Go account” (36%), overhead walkways for walk-ons” (36%), and “charging stations for personal electronics” (26%).
  - The top tier desired amenities for walk-on riders are “free Wi-Fi” (50%), “park & ride lots” (45%), and “designated terminal pickup and drop-off areas” (44%). Second tier amenities are “ability to use Good to Go account” (38%), “overhead walkways to walk-ons” (38%), and “charging stations for personal electronics” (26%).
  - The top tier desired amenity for those bike-on riders is “safer loading & unloading for bicycles” (51%). Second tier is “free Wi-Fi” (49%), “designated terminal pickup and drop-off areas” (41%), and “secure bicycle storage areas at terminal” (39%).
  - The top tier desired amenity for transit riders is “designated Terminal pickup & drop-off areas” (51%). Second tier amenities are “free Wi-Fi” (48%) and “park & ride lots” (44%).



## METHODS FOR ENCOURAGING WALK-ON BEHAVIOR:

- ▶ Better transit connections to and from ferry terminals was the top mentioned method of encouraging walk-ons by vehicle boarding respondents both in January 2019 (40%) and in the policy issues survey conducted in Summer 2016 (43%).
  - Similar to 2016, the second most mentioned encouragement for walking on was “lower parking costs at terminal(s).”
- ▶ Of the three options tested (*General Pickup and Drop-off Areas, For-hire Ride-sharing Services, and Real Time Parking Availability Information*), having private, for-hire ride-share services consistently at your destination terminal (52%) and real time parking availability information (50%) made about half of all riders who drive a vehicle onto the ferries more likely to consider walking on.
  - Multi-modal commuter riders are less likely to be encouraged to walk-on than the general ridership, for the private for-hire ride-sharing services (45%) and real time parking availability information (42%).
  - Vehicle only users are less motivated by any of the three options tested. For-hire ride sharing (41%) and real time parking availability information (37%) might encourage about four in ten vehicle only users to walk-on.
  - Walk-on riders are more encouraged to continue walking on if improvements are made in for-hire ride-sharing (56%) and real time parking availability information (54%).
  - Over six in ten transit users are encouraged to walk-on by the for-hire ride sharing option (62%) and real time parking availability information (61%).
- ▶ About half of all riders (52%) do or could use a train / bus in combination with the ferries.
  - Over four in ten (41%) of those that already do use a train / bus do not feel the schedule adequately matches up.
  - Over two in three (66%) riders who might do a train / bus either feel it does not match up (24%) or are unsure (42%).



# Detailed Study Findings



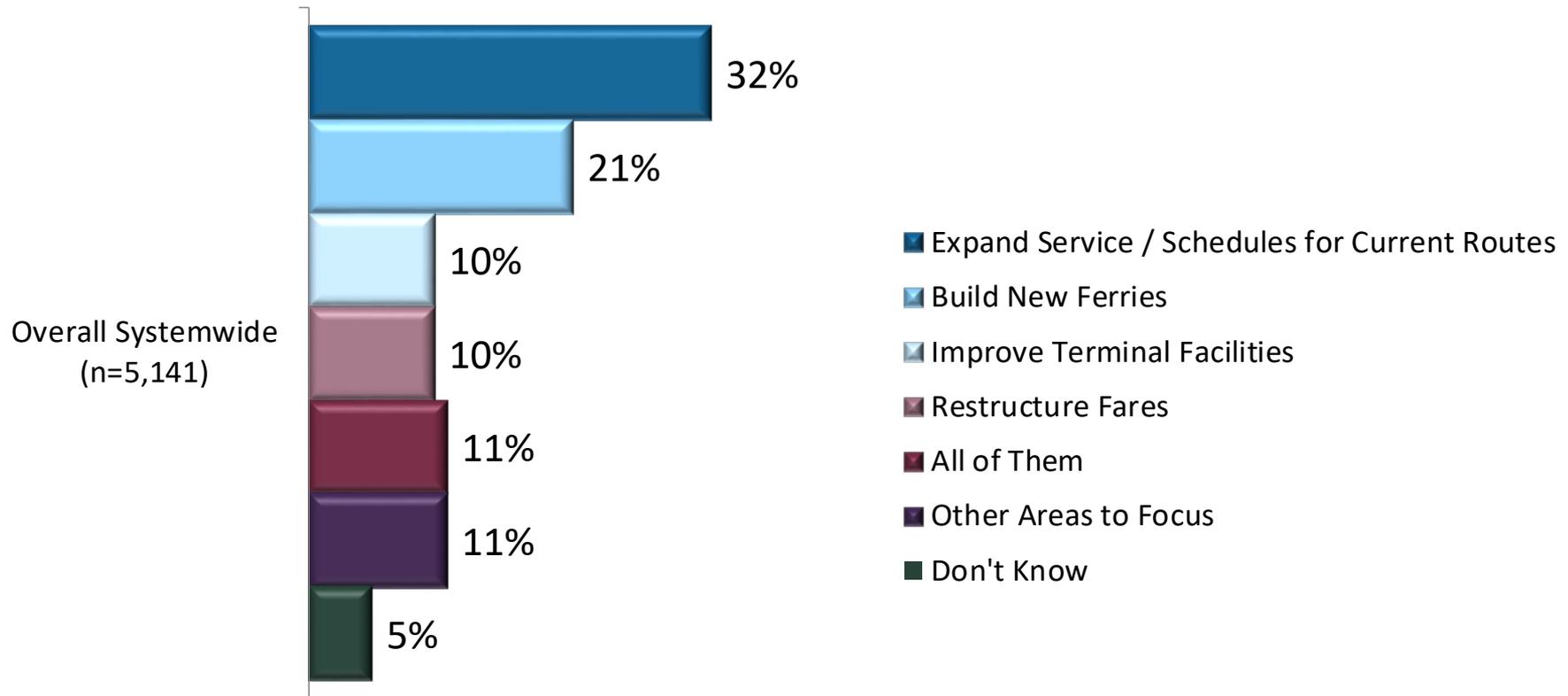
# Suggested Service Improvements

# Suggested Service Improvements



A total of 5,141 WSF riders were asked which of four issues/projects they felt WSF should focus on to improve its service. One in three (32%) said expand service / schedules for current routes followed by build new ferries (21%). Improve terminal facilities and restructure fares were cited by one in ten as were the responses of focusing on all of them and other suggested areas to focus on.

## Four General Areas WSF Should Concentrate On – Systemwide



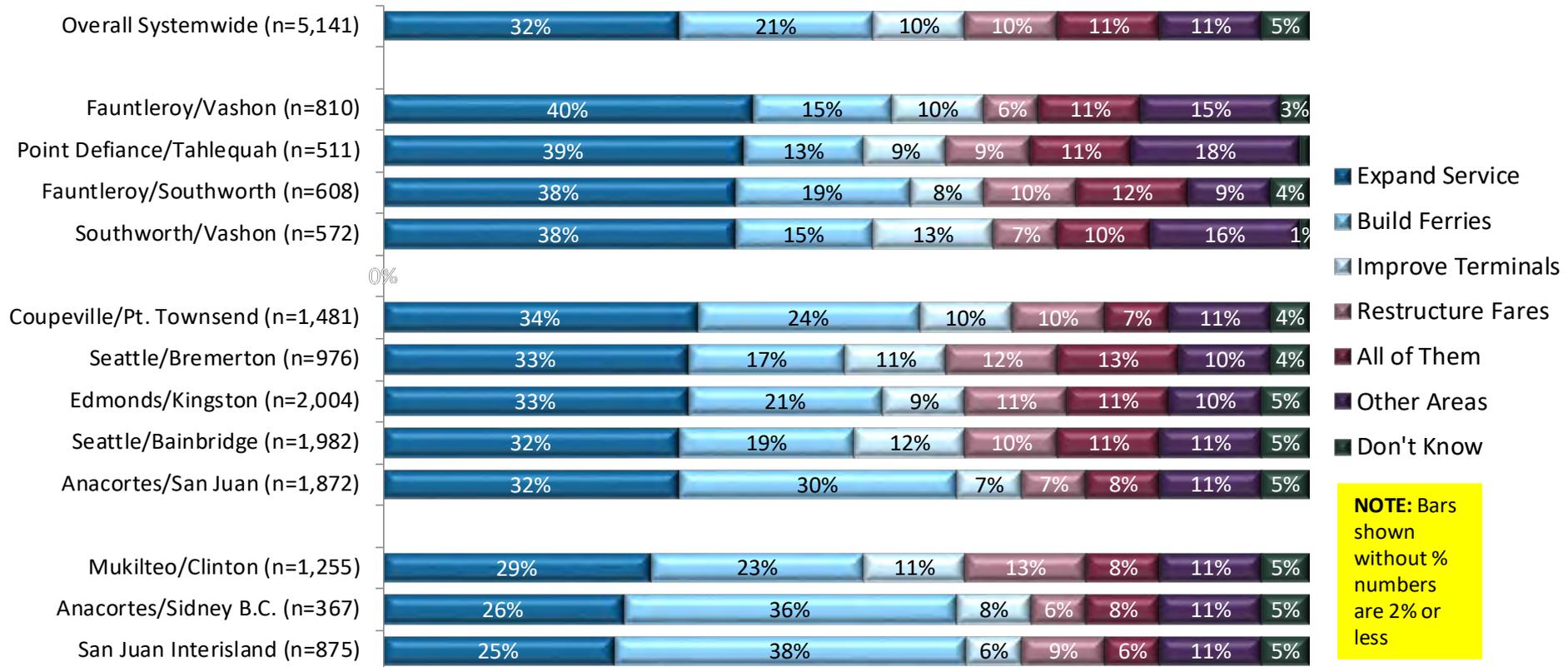
Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

# Suggested Service Improvements



When sorted by the expand service option, the four Vashon routes (40% to 38%) exceed the systemwide average of 32%. Least likely to mention expand service is Anacortes/Sidney B.C. (26%) and San Juan Interisland (25%) with the balance of the routes being about average (34% to 29%).

## Four General Areas WSF Should Concentrate On – By Route (Ranked by Expand Service)



Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

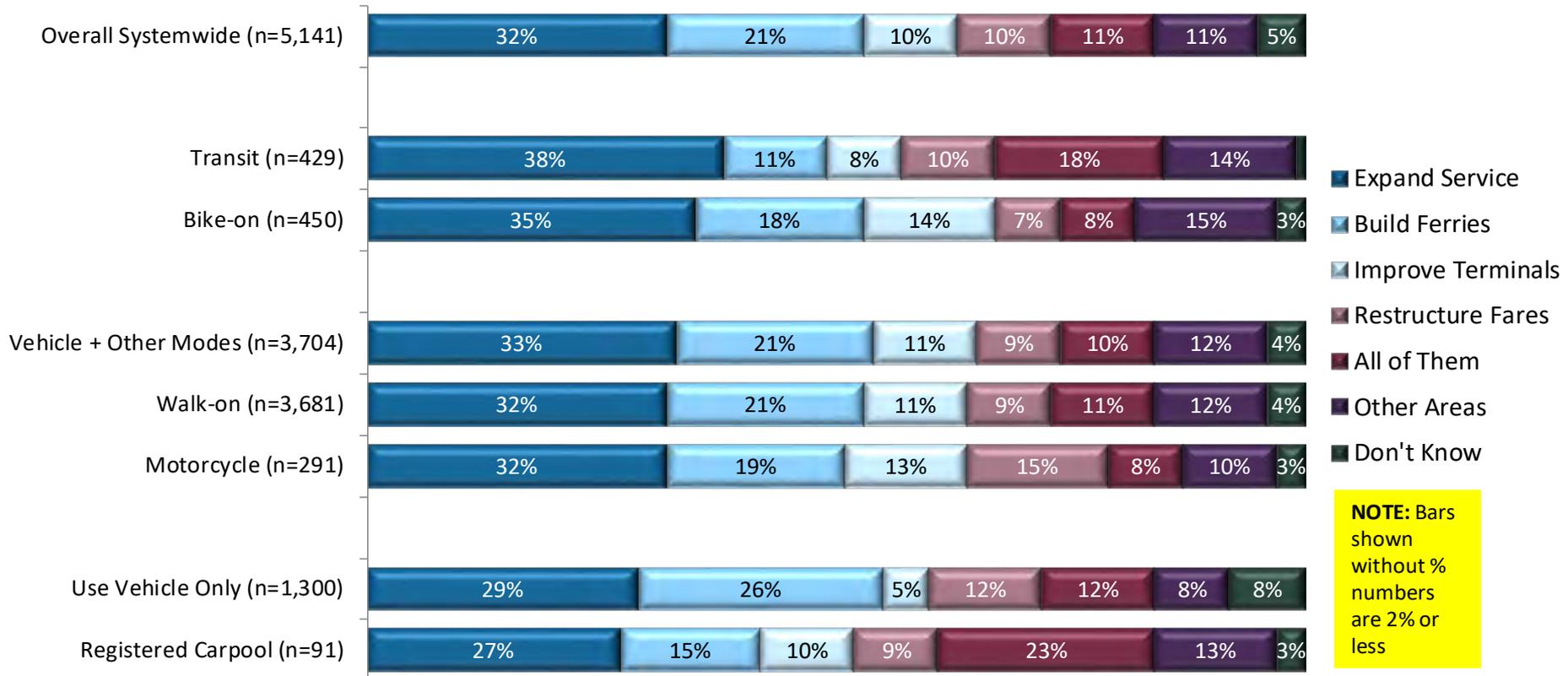
# Suggested Service Improvements



When the results are broken out by the mode riders have used in the last 12 months, the data finds transit riders (38%) and bike-on riders (35%) want expanded service more than average (32%) and more than those that only drive onto a ferry in a vehicle (29%) or registered carpool (27%).

## Four General Areas WSF Should Concentrate On – By Mode

(Ranked by Expand Service)



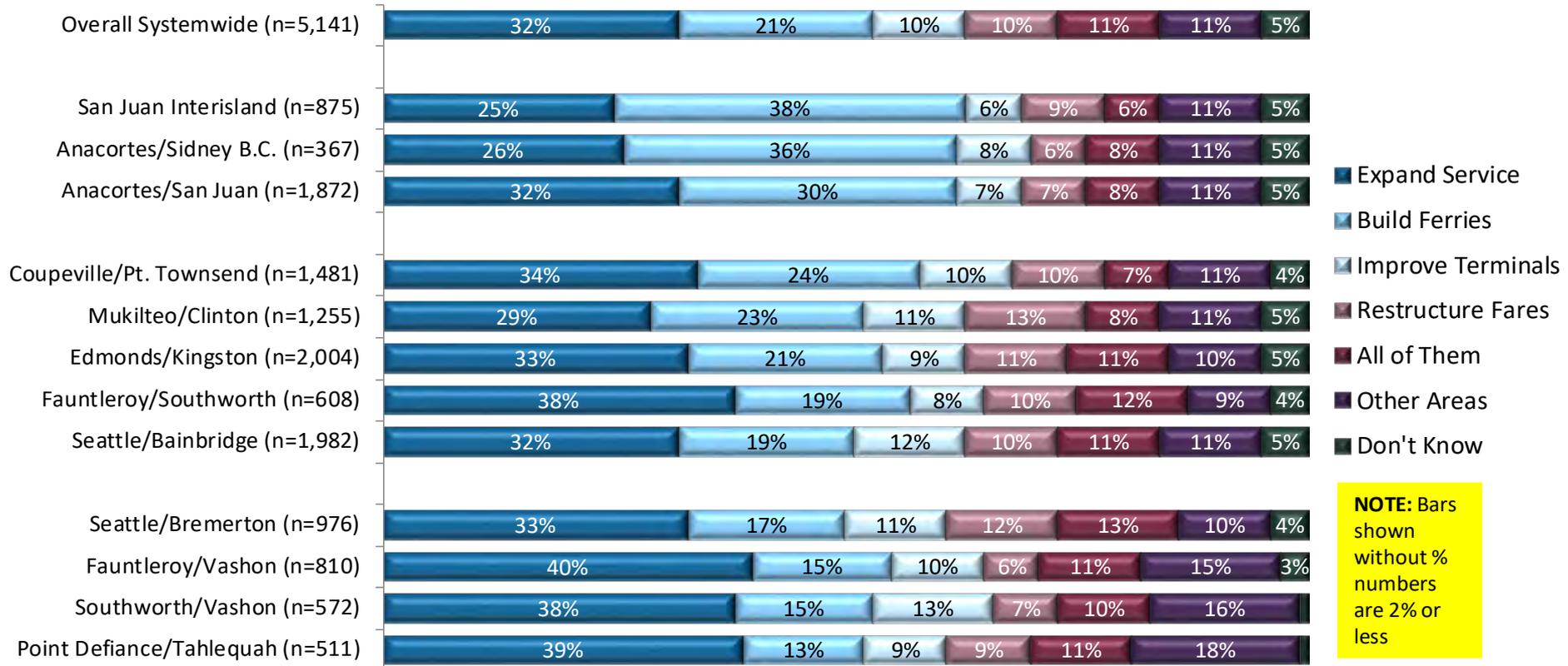
Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

# Suggested Service Improvements



When sorted by the build ferries option, the San Juan routes (38% to 30%) exceed the systemwide average of 21%. Least likely to mention build ferries is the three direct Vashon routes (15% to 13%) with the balance of the routes being about average (24% to 17%).

## Four General Areas WSF Should Concentrate On – By Route (Ranked by Build Ferries)



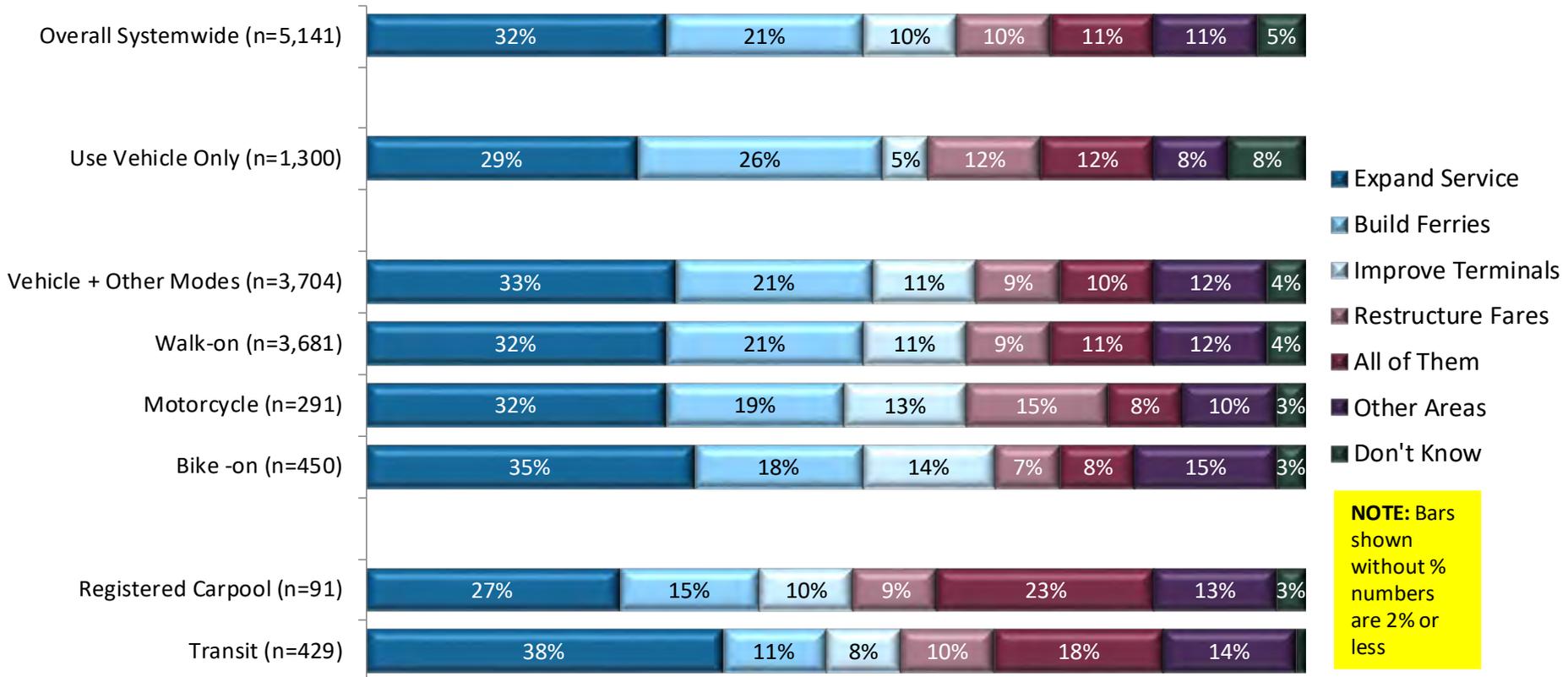
Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

# Suggested Service Improvements



When the results are broken out by the mode riders have used in the last 12 months, the data finds those that only people that drive on in a vehicle (26%) want the build ferries option slightly more than average (21%). In comparison, transit riders (11%) were least likely to cite this option.

## Four General Areas WSF Should Concentrate On – By Mode (Ranked by Build Ferries)



Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)



# Potential Amenities Desired

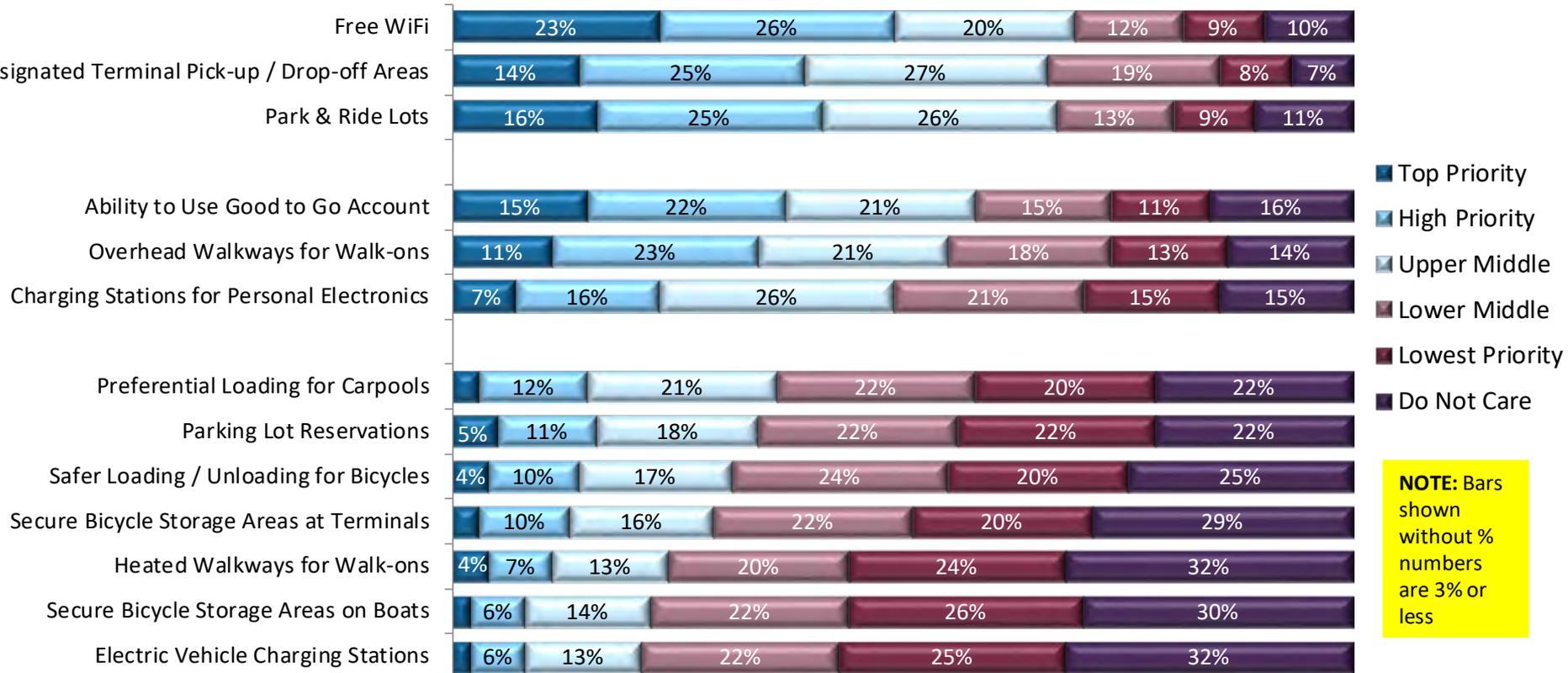
# Potential Amenities Desired



The 5,141 riders ranked thirteen potential amenities from top priority to do not care about it. The top three highest ranked amenities were “free Wi-Fi,” “designated terminal pickup / drop-off area,” and “park & ride lots.” The next group were “ability to use Good to Go account,” “overhead walkways for walk-ons,” and “charging stations for personal electronics.”

## Ranking of Potential Amenities - By Average Priority Statewide

(n=5,141)



**NOTE:** Bars shown without % numbers are 3% or less

Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

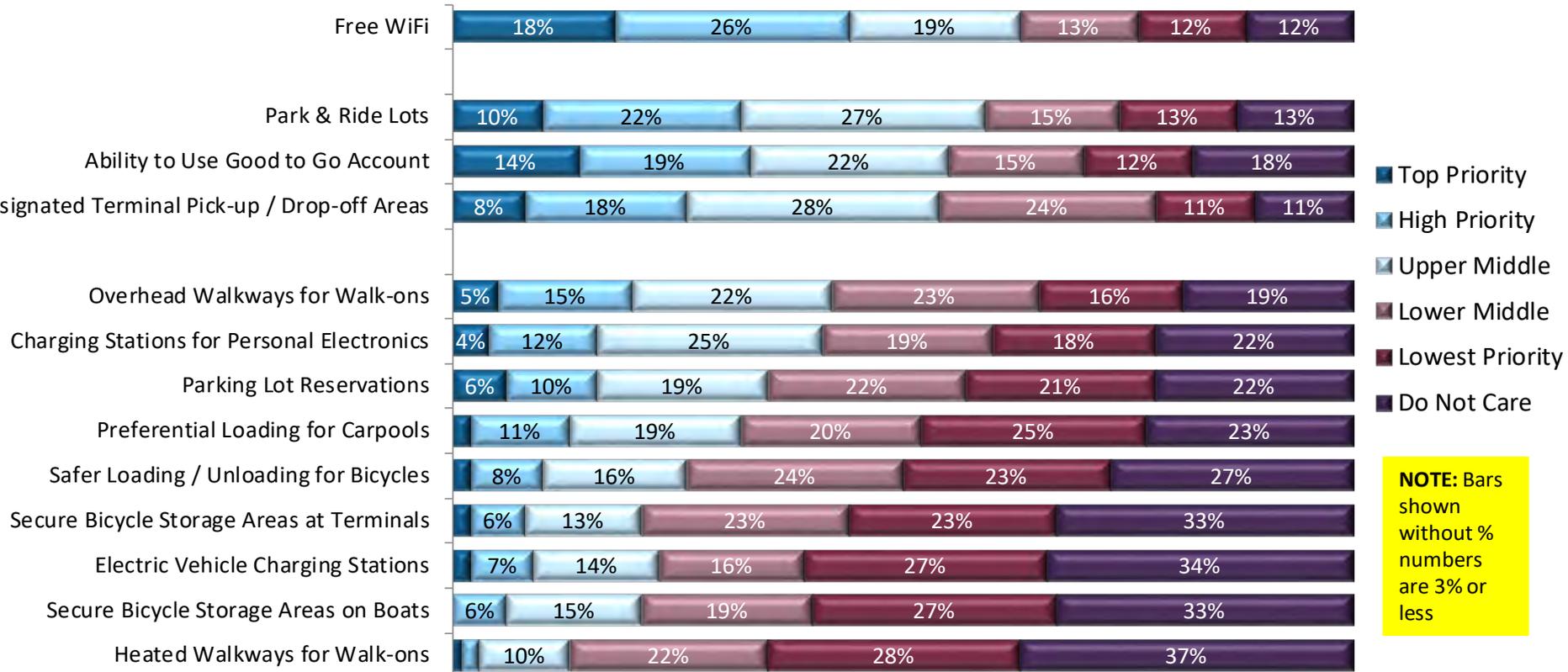
# Potential Amenities Desired



When the amenities are broken out by riders who only drive onto a ferry, the top tier amenity is “free Wi-Fi.” Second tier amenities are “park & ride lots,” ability to use Good to Go account,” and “designated terminal pickup and drop-off areas.”

## Use Vehicle Only - Ranking of Amenities By Average Priority

(n=1,300)



**NOTE:** Bars shown without % numbers are 3% or less

Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

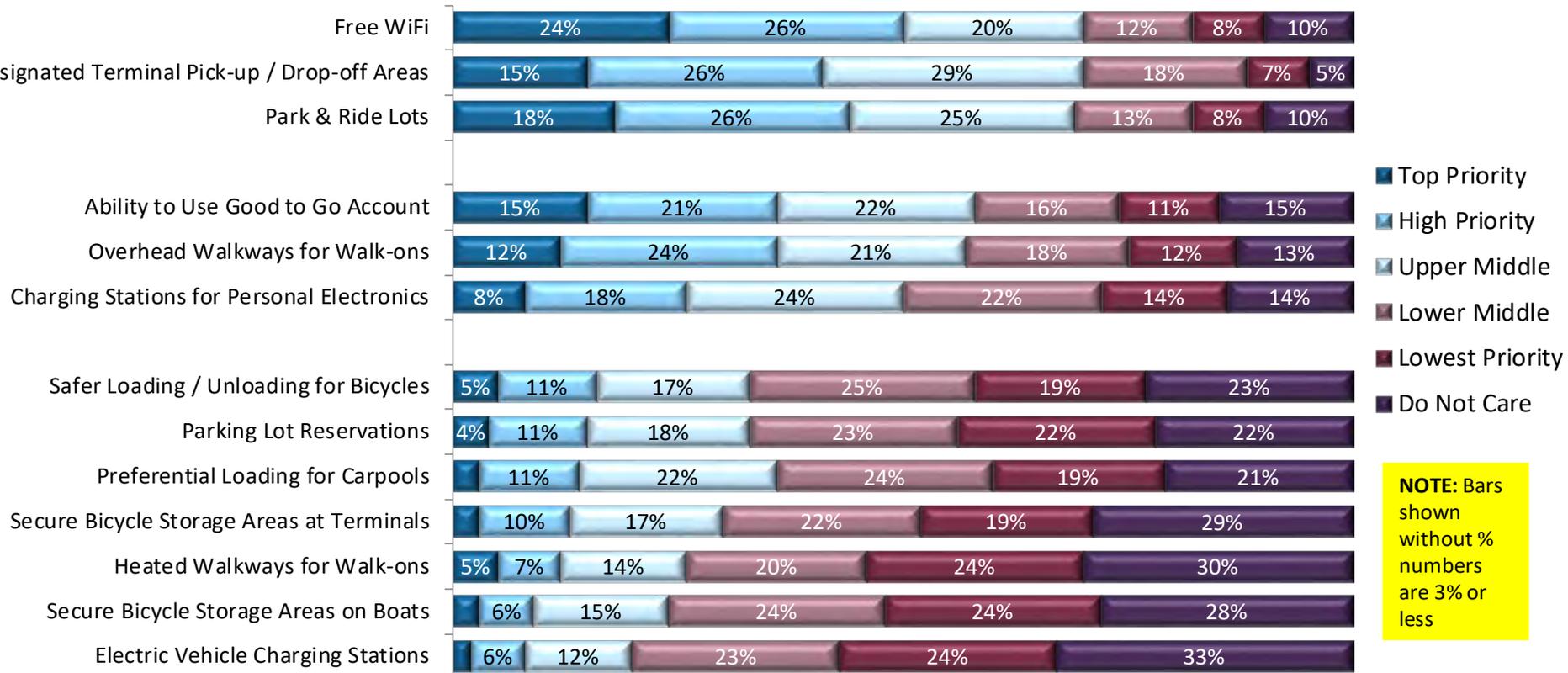
# Potential Amenities Desired



*The top tier desired amenities for riders who enter a ferry via a vehicle as well as other modes are “free Wi-Fi,” “designated terminal pickup / drop-off areas,” and “park and ride lots.” Second tier amenities are “ability to use Good to Go account,” overhead walkways for walk-ons,” and “charging stations for personal electronics.”*

## Use Vehicle/Other Modes - Ranking of Amenities By Average Priority

(n=3,704)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

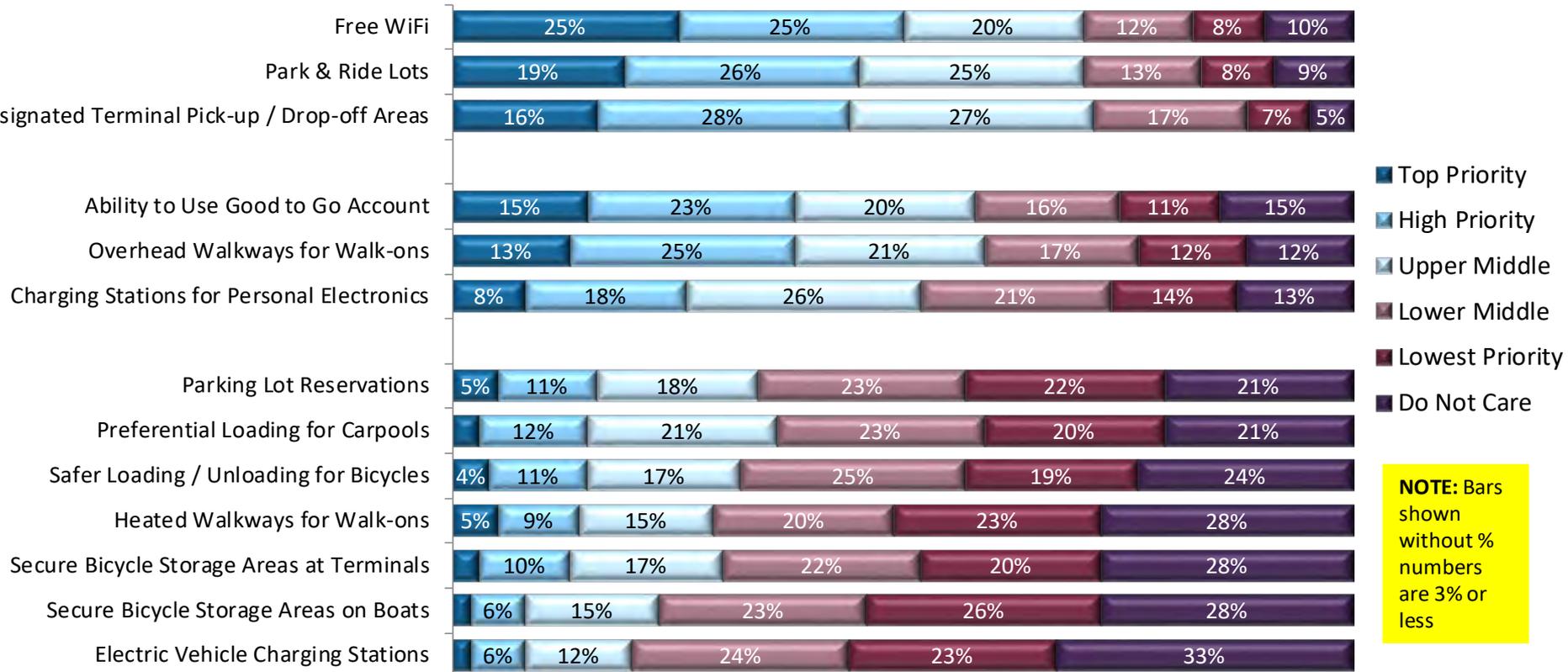
# Potential Amenities Desired



The top tier desired amenities for walk-on riders are “free Wi-Fi,” “park & ride lots,” and “designated terminal pickup and drop-off areas.” Second tier amenities are “ability to use Good to Go account,” “overhead walkways for walk-ons” and “charging stations for personal electronics.”

## Walkers - Ranking of Amenities By Average Priority

(n=3,681)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

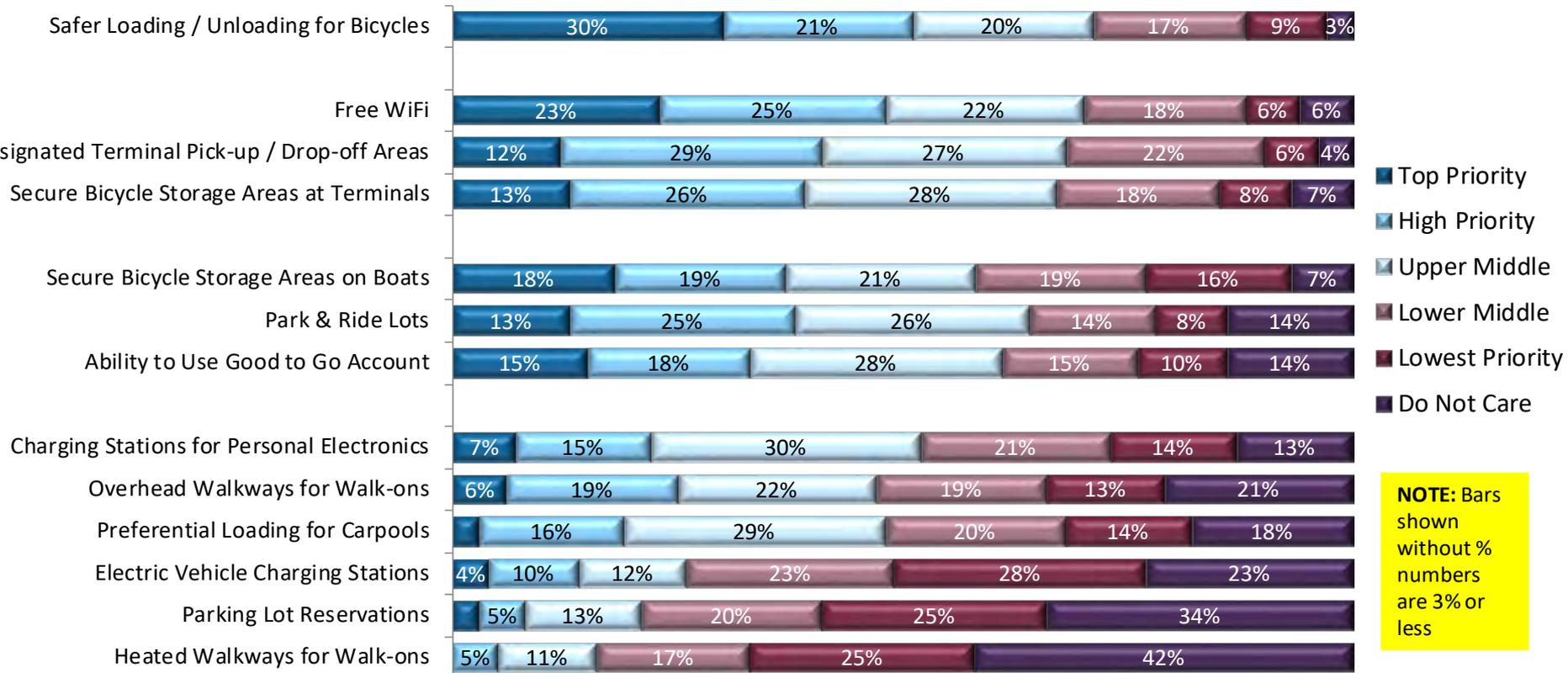
# Potential Amenities Desired



The top tier desired amenity for those bike-on riders is “safer loading / unloading for bicycles.” Second tier is “free Wi-Fi,” “designated terminal pickup and drop-off areas,” and “secure bicycle storage areas at terminal.” Third tier amenities are “secure bicycle storage areas on boats,” “park and ride lots,” and “ability to use Good to Go account.”

## Bike Riders - Ranking of Amenities By Average Priority

(n=450)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

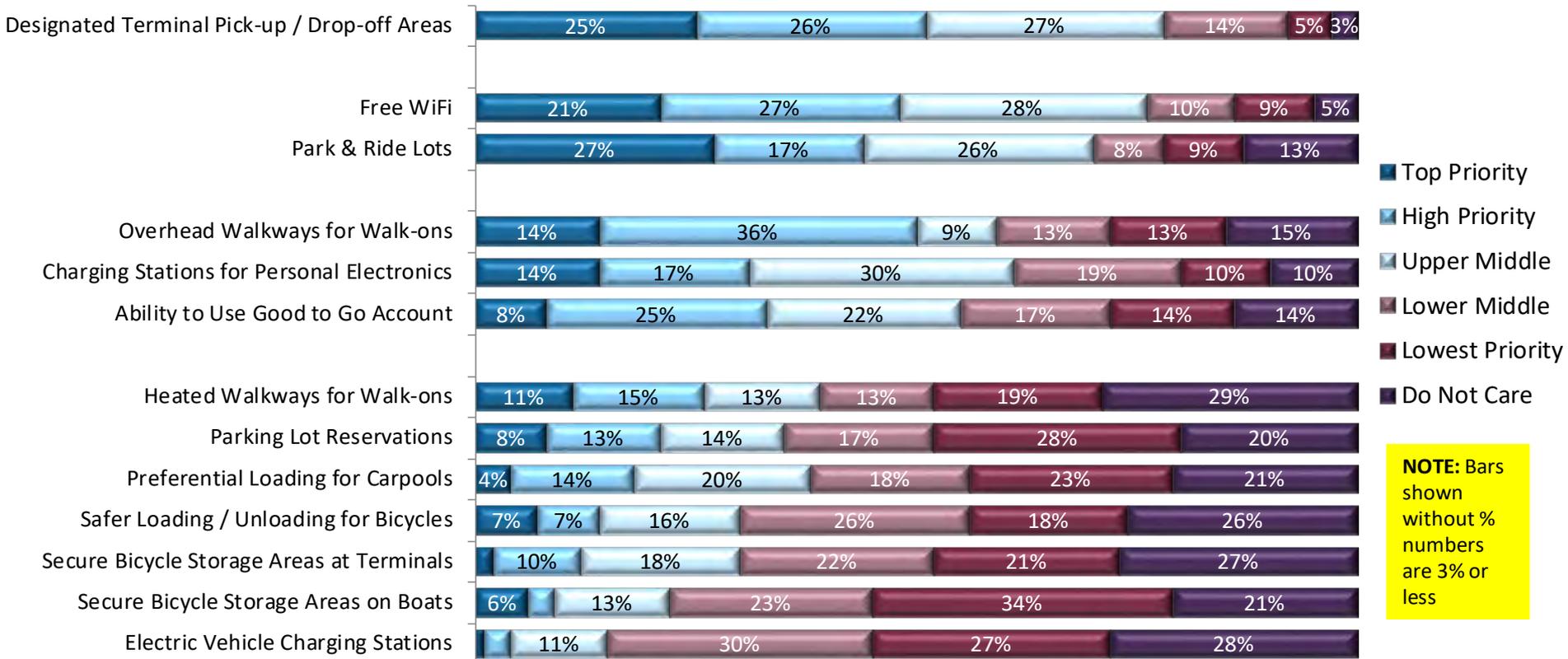
# Potential Amenities Desired



The top tier desired amenity for those transit riders is “designated terminal pickup / drop-off areas.” Second tier amenities are “free Wi-Fi” and “park & ride lots.” Third tier amenities are “overhead walkways for walk-ons,” “charging stations for personal electronics,” and “ability to use Good to Go account.”

## Transit Riders - Ranking of Amenities By Average Priority

(n=429)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

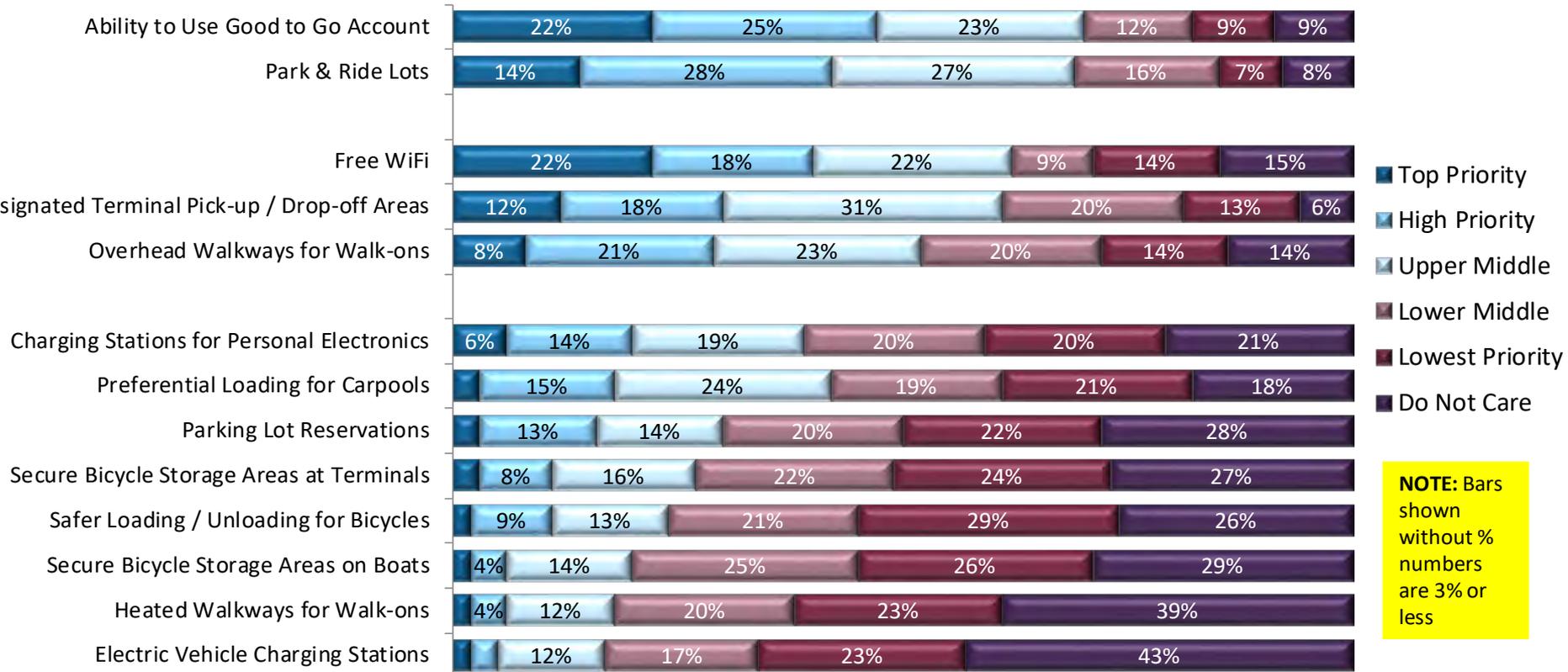
# Potential Amenities Desired



The top tier desired amenities for motorcycle riders were “ability to use Good to Go account” and “park & ride lots.” The second tier amenities were “free Wi-Fi,” “designated terminal pick-up and drop off areas,” and “overhead walkways for walk-ons.”

## Motorcycle - Ranking of Amenities By Average Priority

(n=291)



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

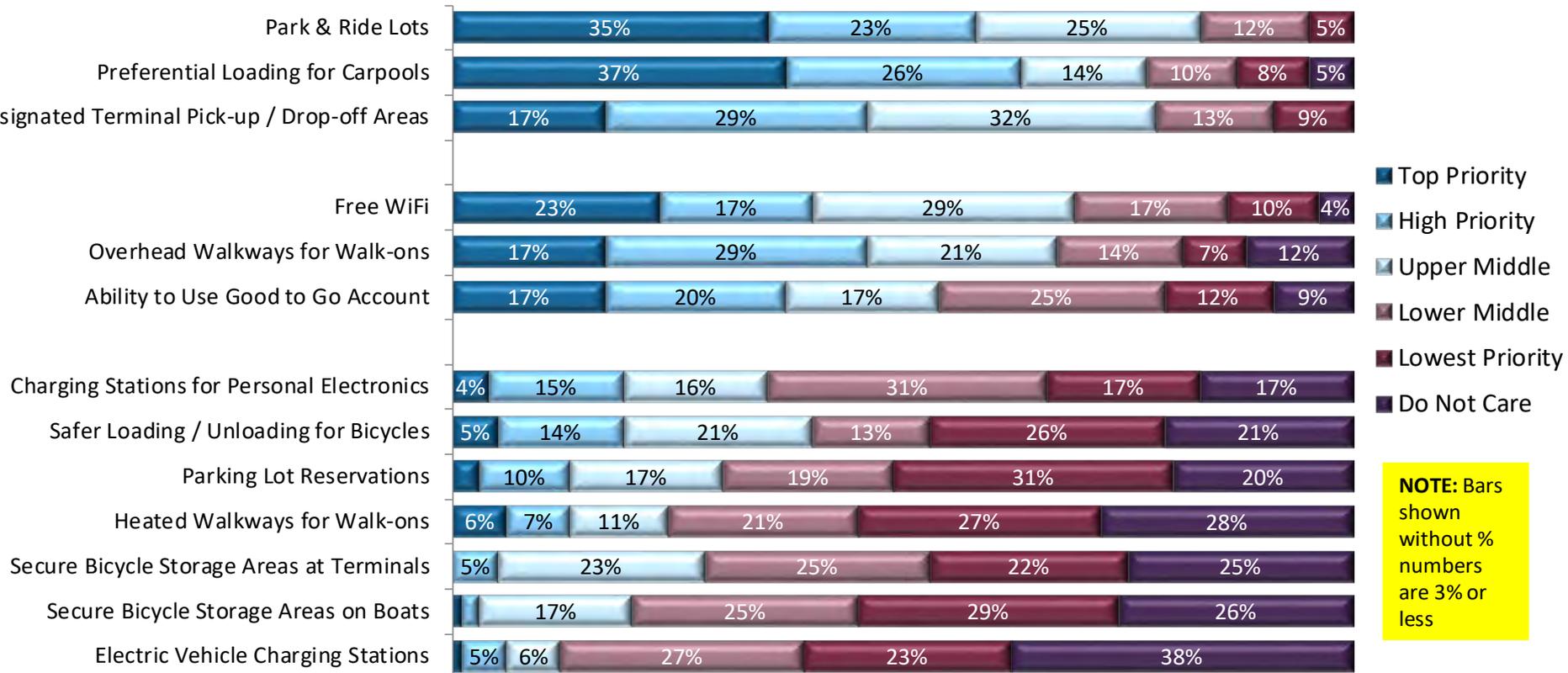
# Potential Amenities Desired



The top tier desired amenities for driving on ferries in Vanpool / Carpool were “park & ride lots,” “preferential loading for carpools,” and “designated terminal pickup and drop off areas.” The second tier amenities included “free Wi-Fi,” “overhead walkways for walk-ons,” and “ability to use Good to Go accounts.”

## Carpool - Ranking of Amenities By Average Priority

(n=91)



**NOTE:** Bars shown without % numbers are 3% or less

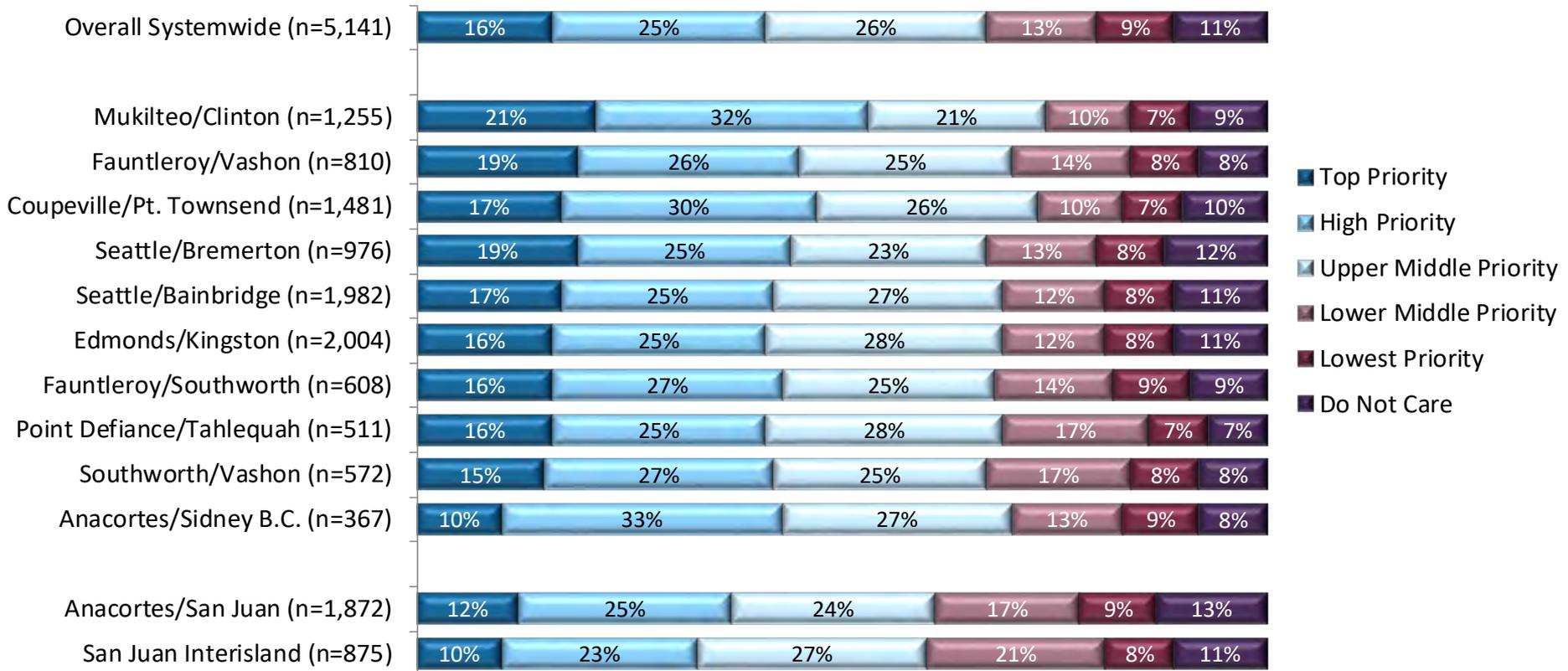
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



All routes had approximately the same level of desire for park & ride lots except perhaps Anacortes/San Juan and San Juan Interisland.

## Park & Ride Lots



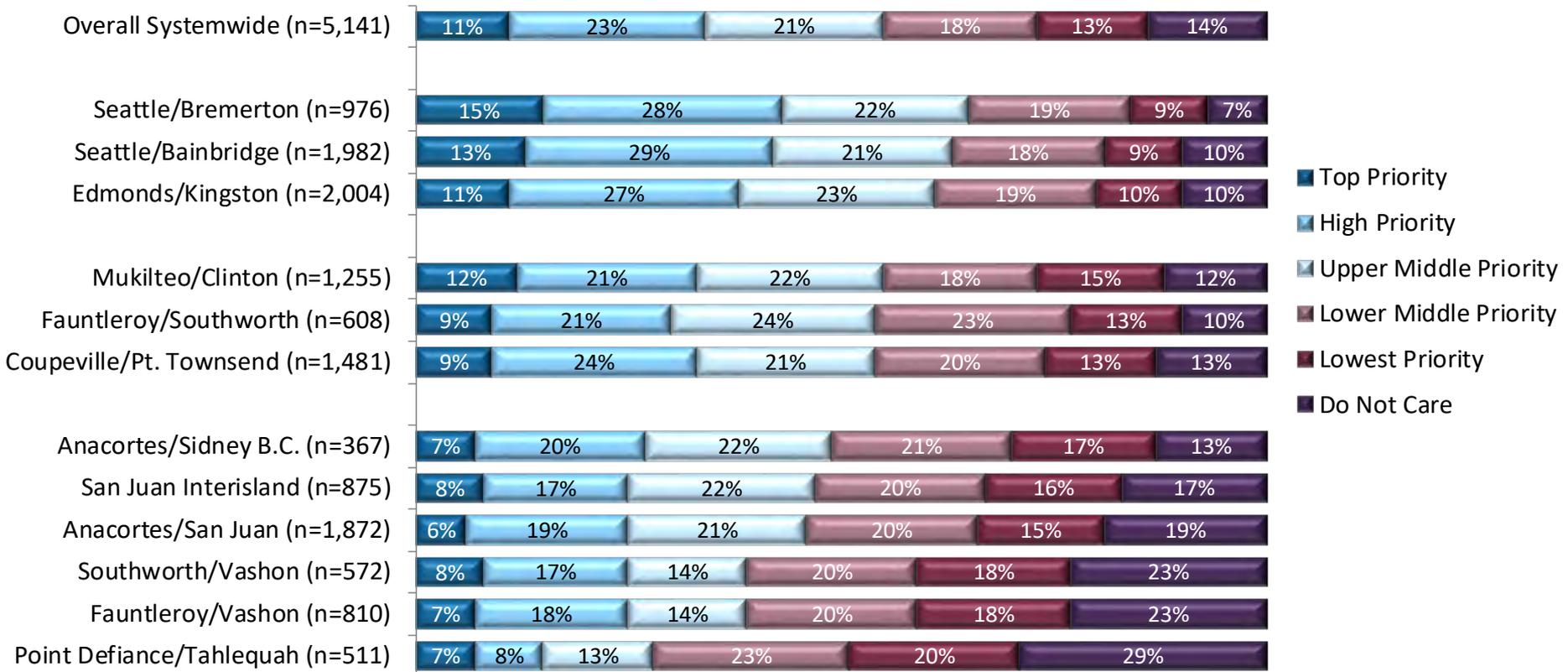
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Overhead walkways for walk-ons tends to be desired more on the Seattle/Bremerton, Seattle/Bainbridge, and Edmonds/Kingston routes followed by Mukilteo/Clinton, Fauntleroy/Southworth, and Coupeville/Port Townsend.*

## Overhead Walkways for Walk-ons



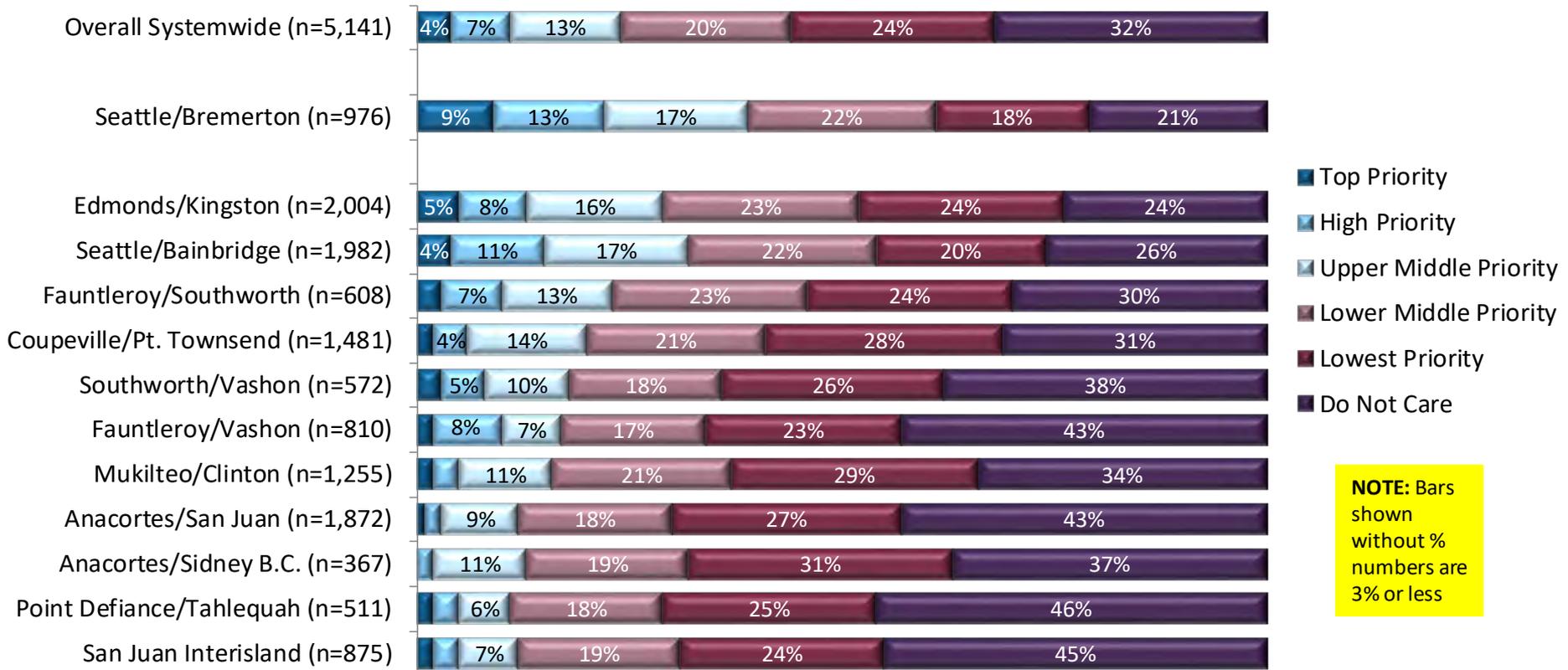
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Heated walkways for walk-ons tends to be desired more on the Seattle/Bremerton route over all other routes.*

## Heated Walkways for Walk-ons



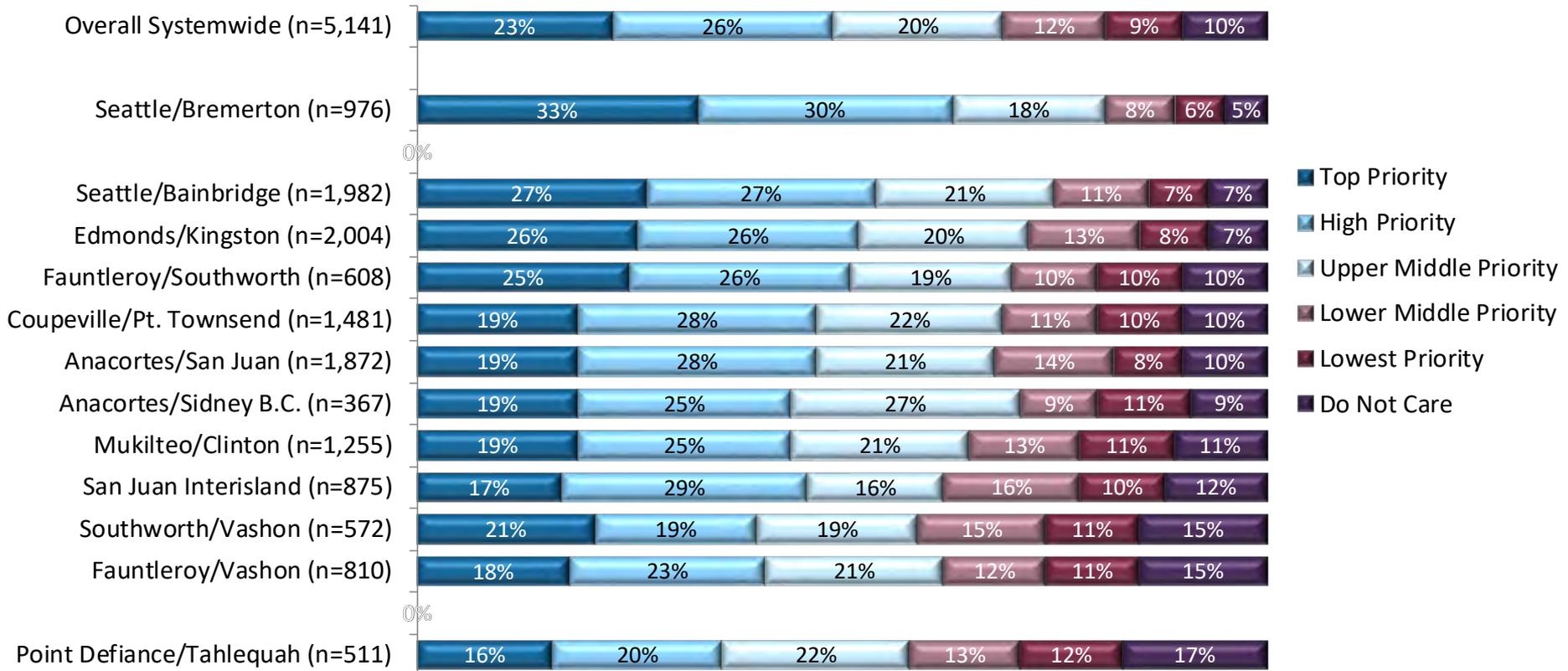
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



Free Wi-Fi tends to be desired more on the Seattle/Bremerton route over all other routes. It is least desired on the Point Defiance/Tahlequah route.

## Free Wi-Fi



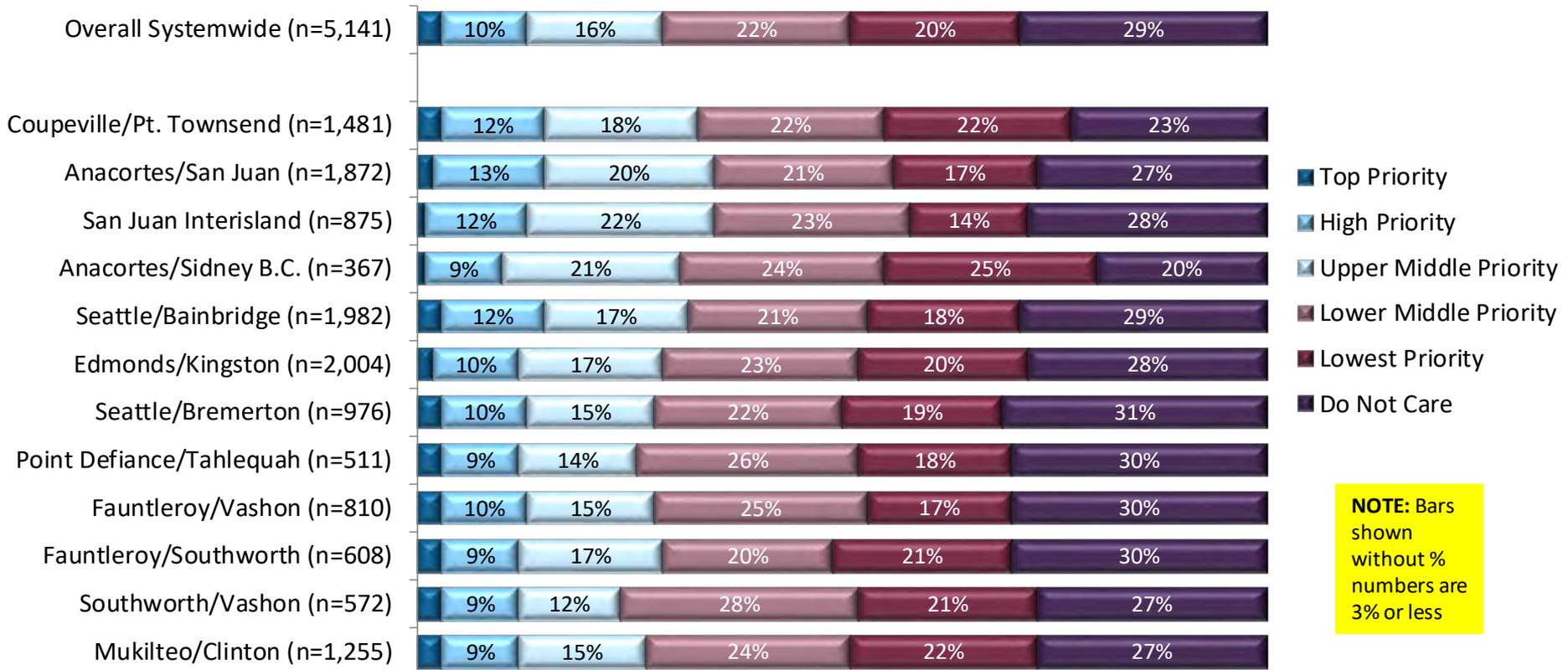
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



Secure bicycle storage areas at terminals tends to be desired about the same across all routes.

## Secure Bicycle Storage Areas at Terminals



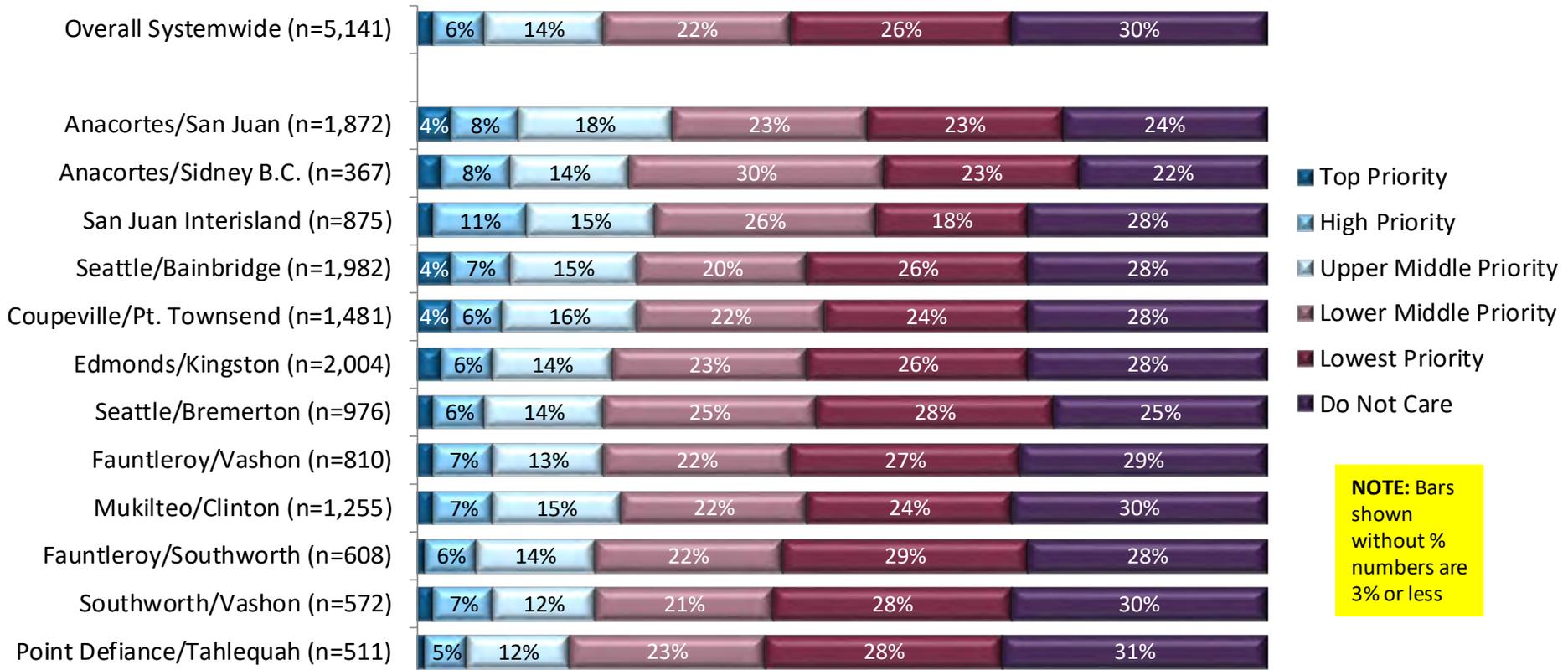
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



Secure bicycle storage areas on boats tends to be desired about the same across all routes.

## Secured Bicycle Storage Areas on Boats



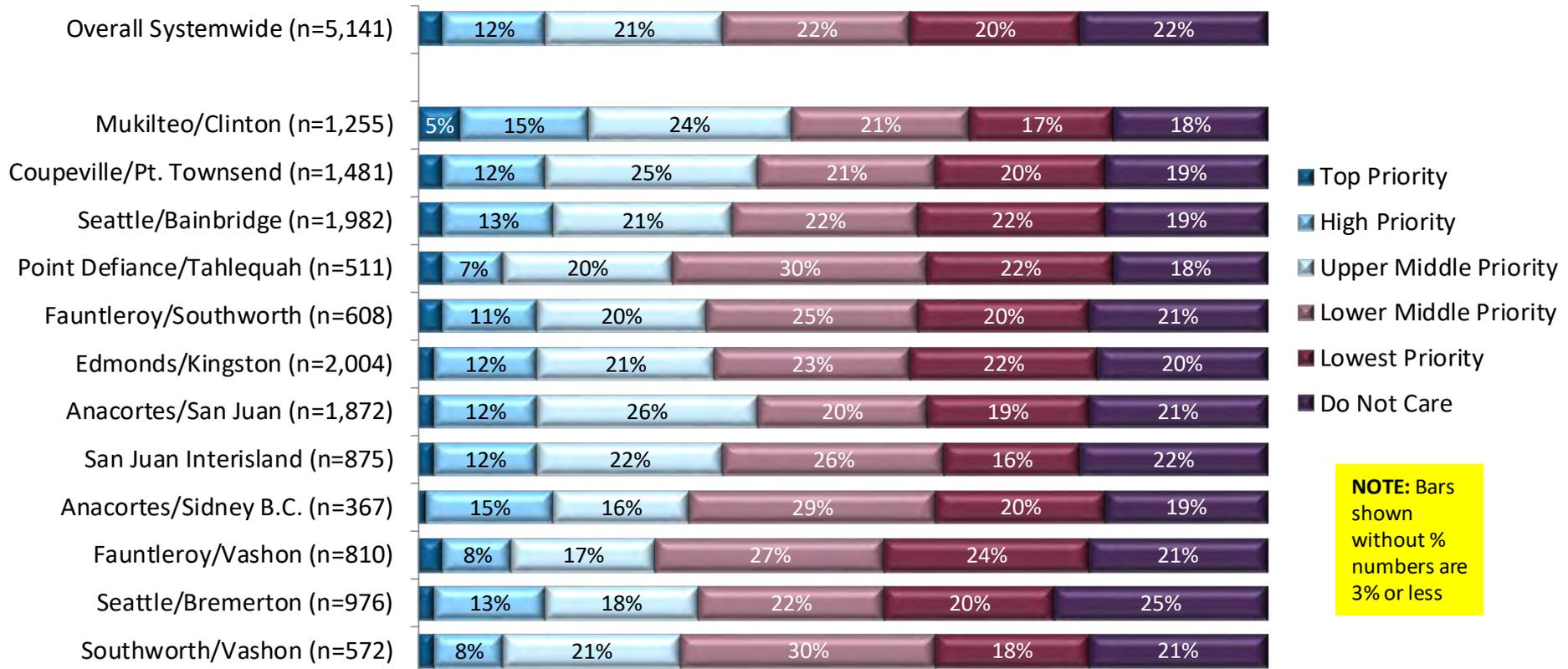
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Preferential loading for carpools tends to be desired about the same across all routes.*

## Preferential Loading for Carpools



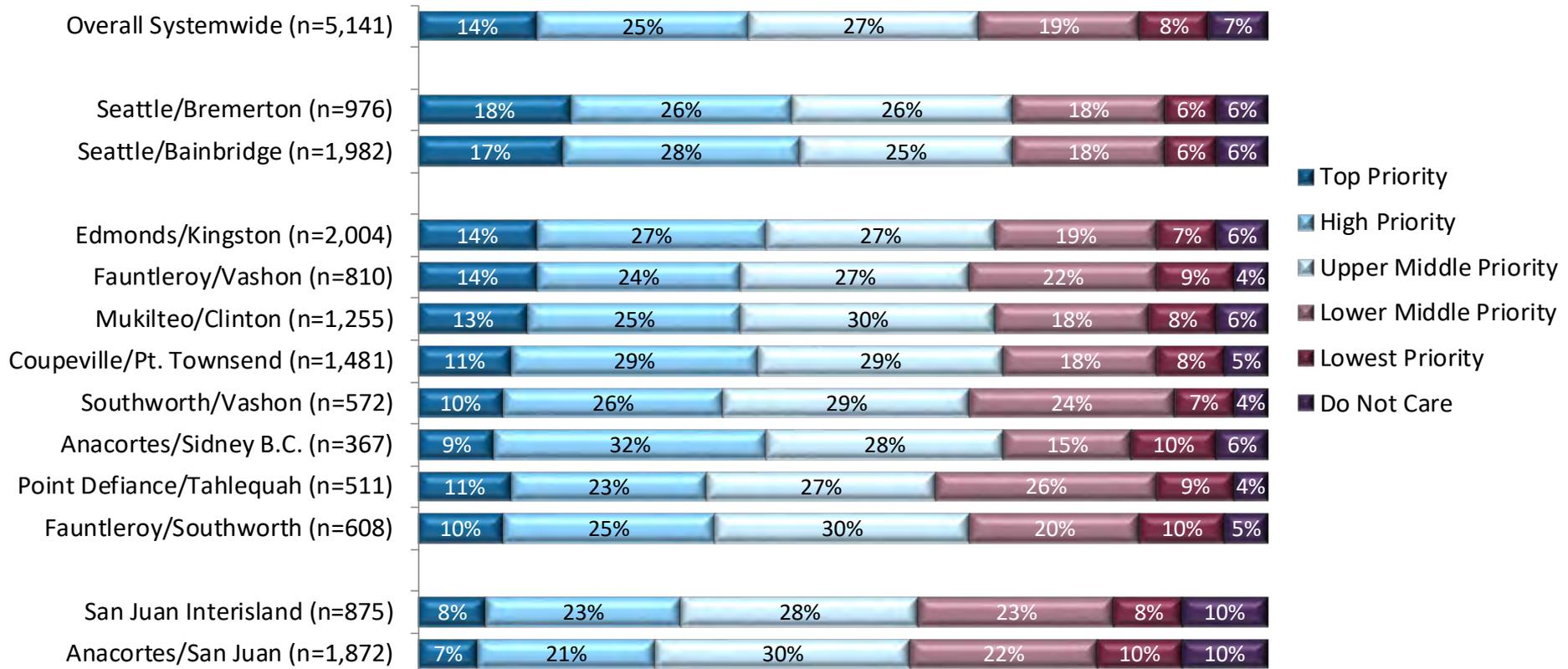
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Designated terminal pickup / drop-off areas tends to be more desired on the Seattle/Bremerton and Seattle/Bainbridge routes and least desired on the San Juan Interisland and Anacortes/San Juan routes.*

## Designated Terminal Pick-up / Drop-off Areas



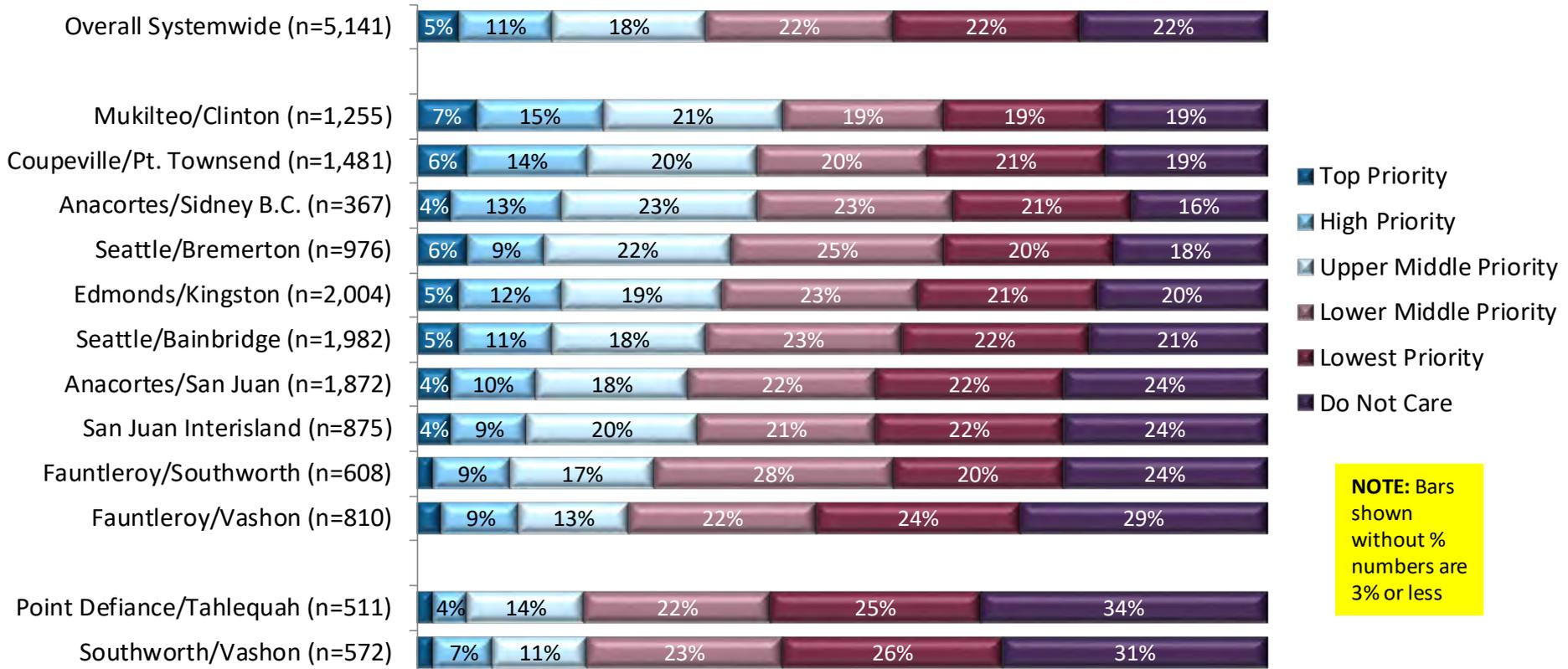
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



Parking lot reservations are least desired on the Point Defiance/Tahlequah and Southworth/Vashon routes.

## Parking Lot Reservations



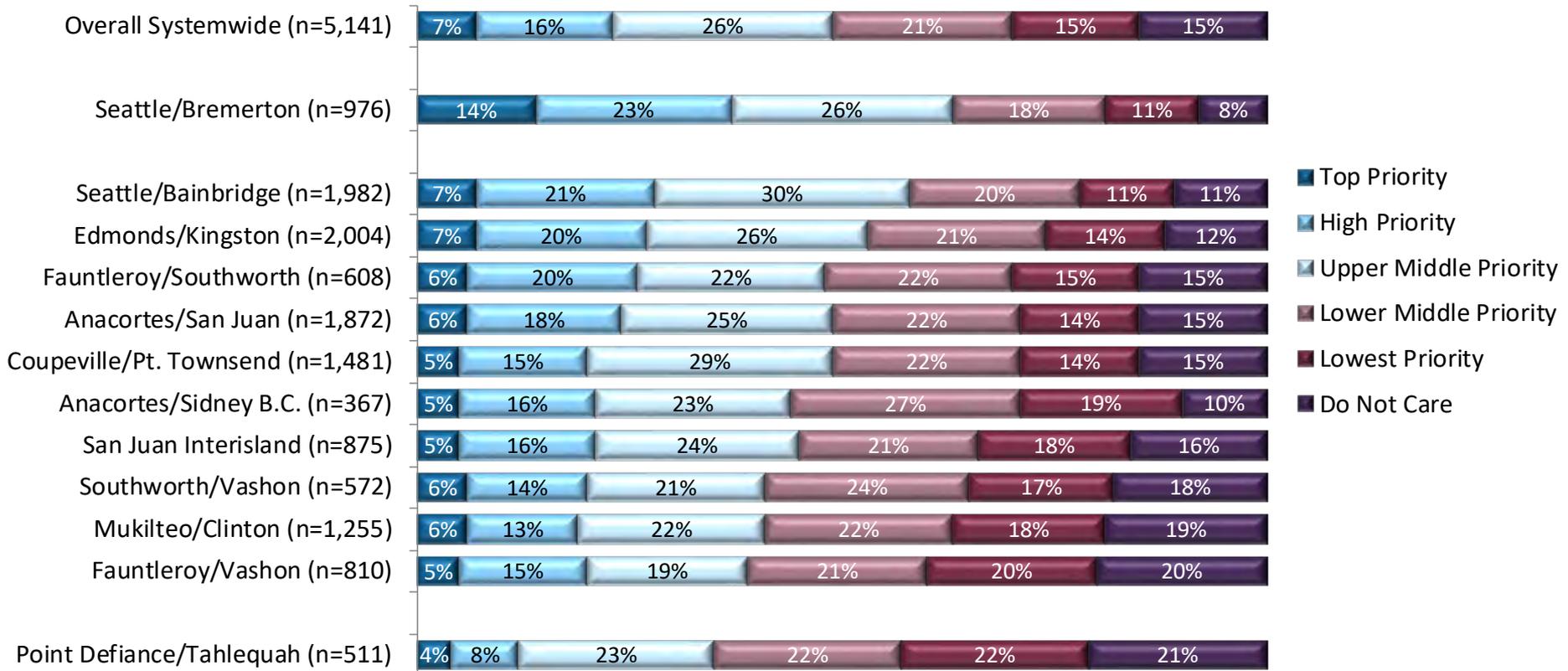
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Charging stations for personal electronics tends to be more important to riders of the Seattle/Bremerton route and least important to the riders of the Point Defiance/Tahlequah route.*

## Charging Stations for Personal Electronics



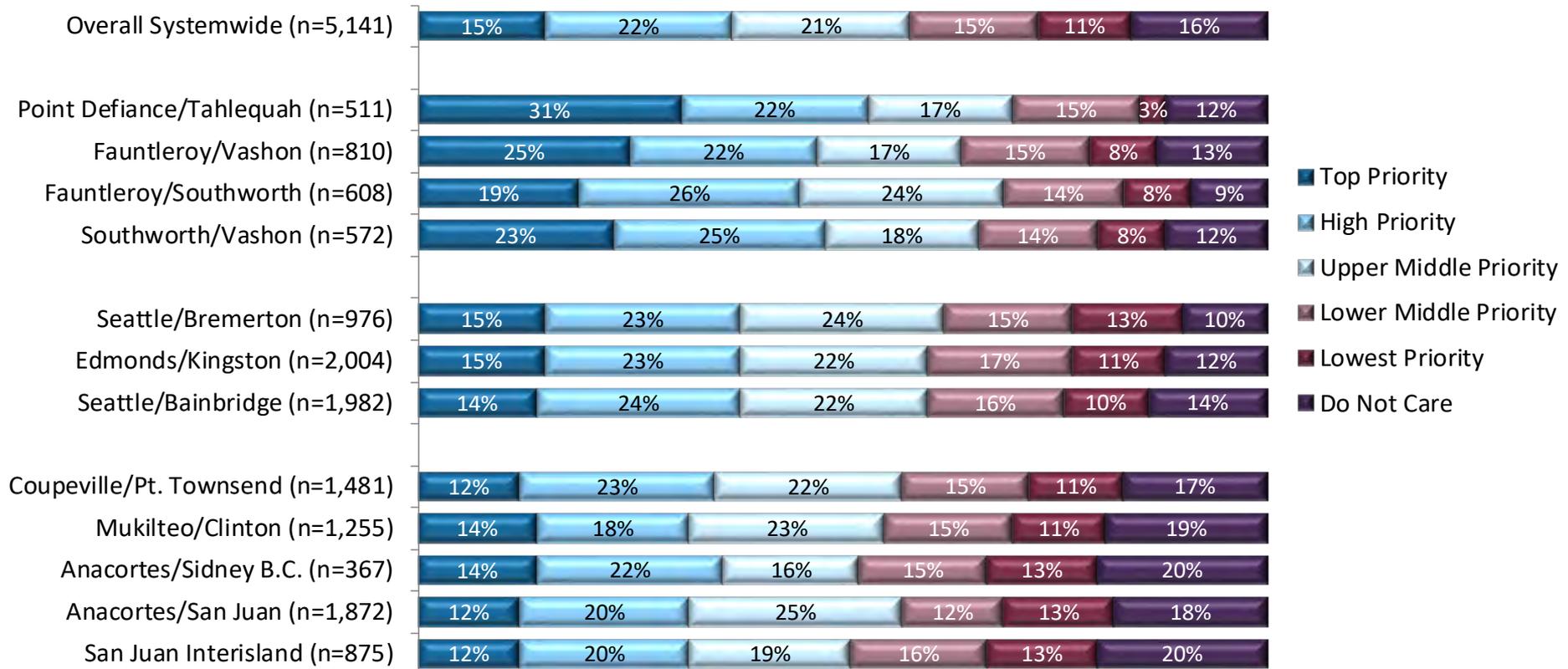
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Ability to use the Good to Go account is most desired on the Vashon triangle routes followed by the Seattle routes as well as Edmonds/Kingston.*

## Ability to Use Good to Go Account



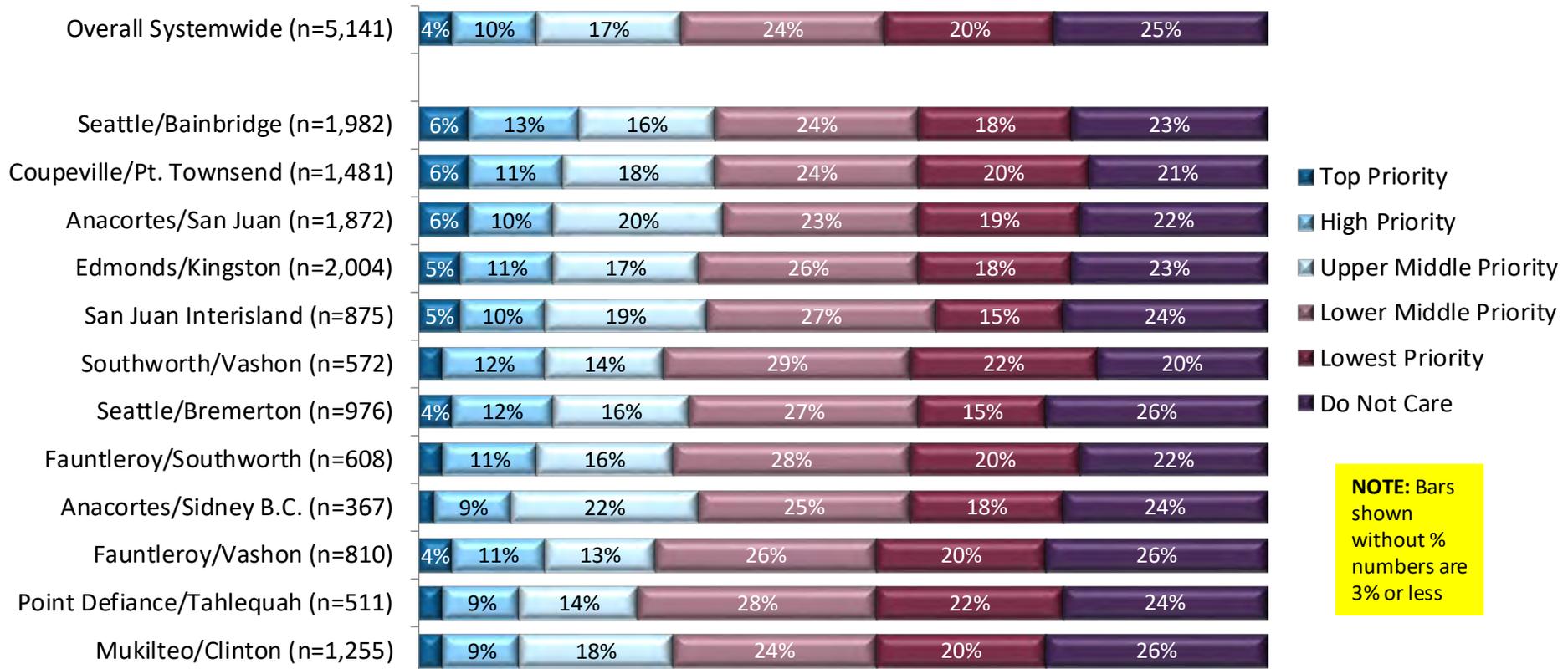
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Desire for safe loading / unloading for bicycles is uniform across all routes.*

## Safer Loading / Unloading for Bicycles



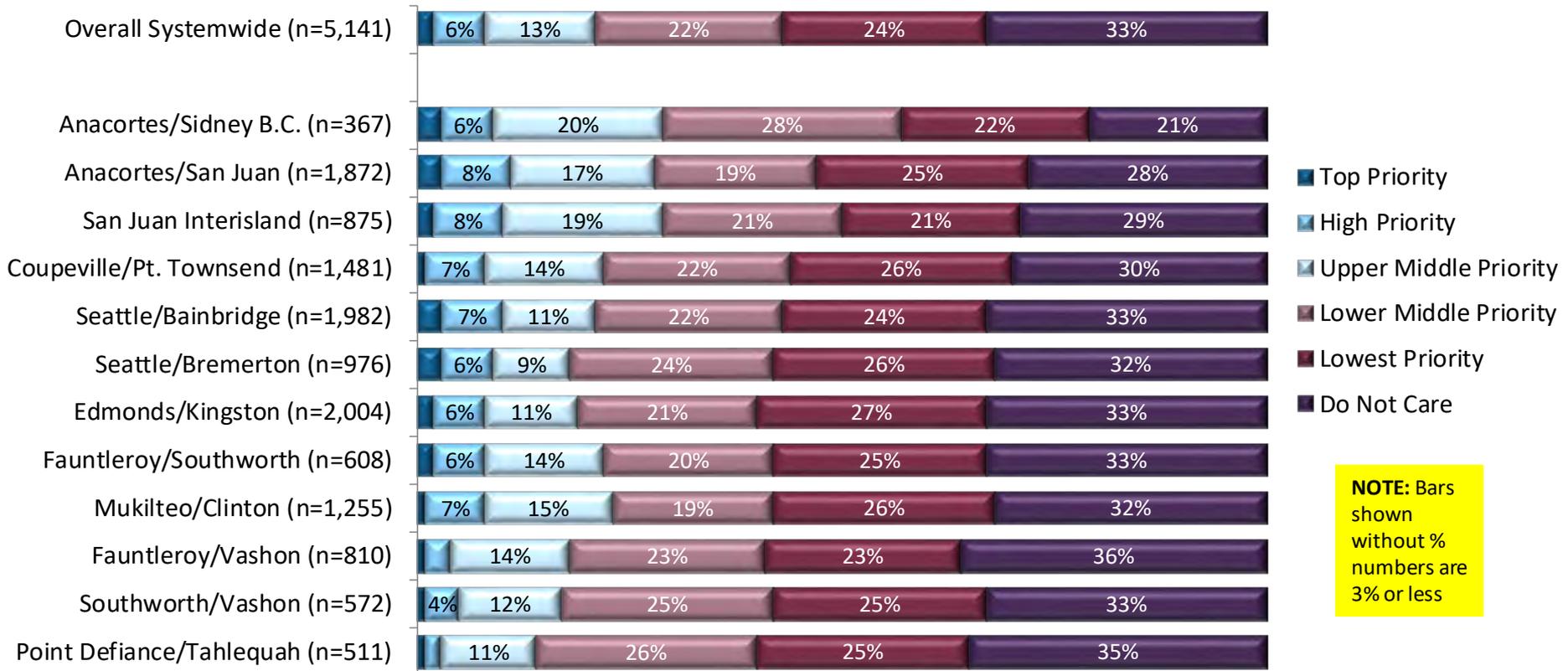
Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.

# Potential Amenities Desired



*Electric vehicle charging stations is uniform across all routes.*

## Electric Vehicle Charging Stations



Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you, or you can rank it anywhere in-between.



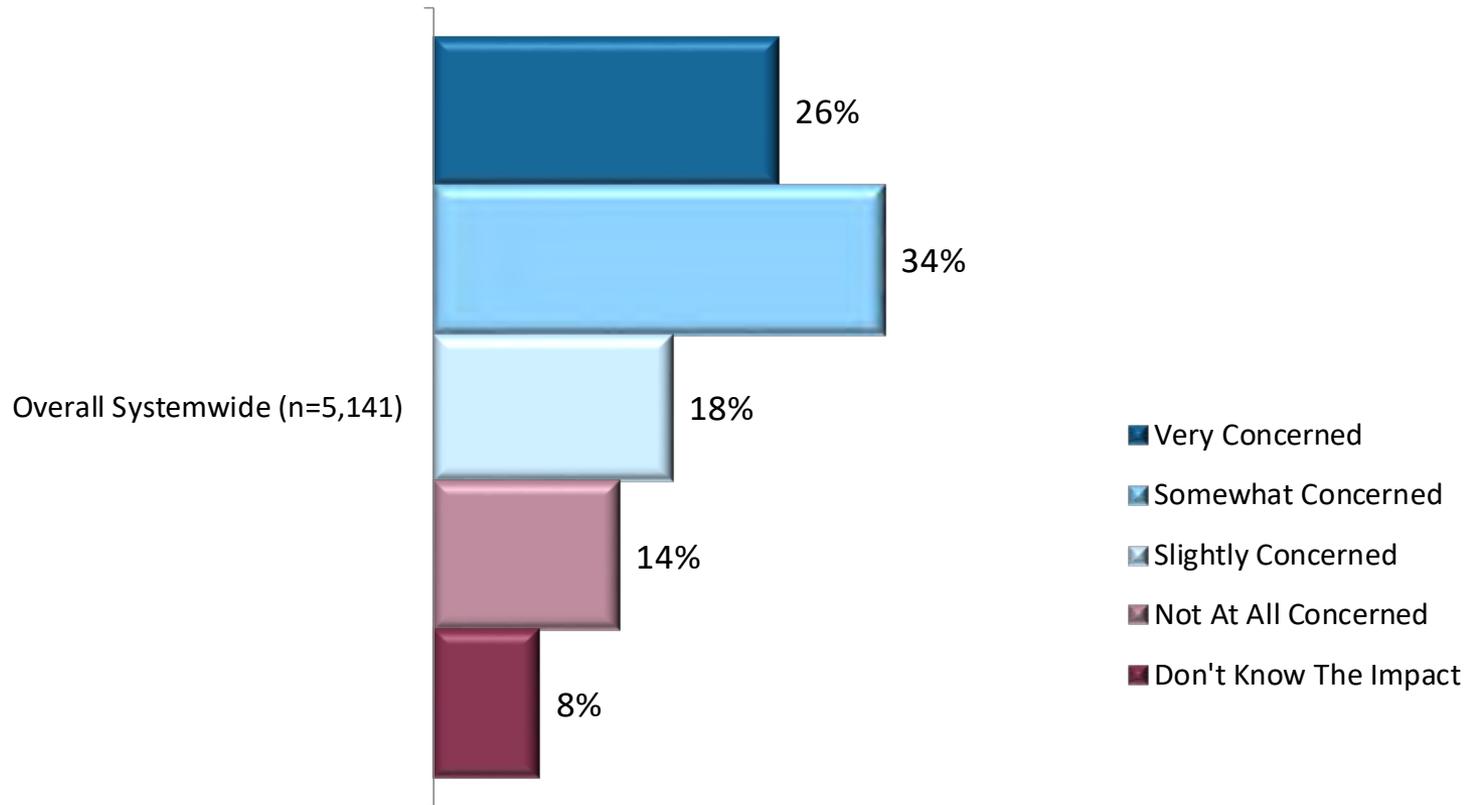
# Attitudes Towards WSF

# Attitudes Towards WSF



Over three in four (78%) riders are concerned over WSF's carbon footprint. Over one in four (26%) are very concerned while 14% are not at all concerned and 8% don't know the impact.

## Concern Over WSF's Carbon Footprint



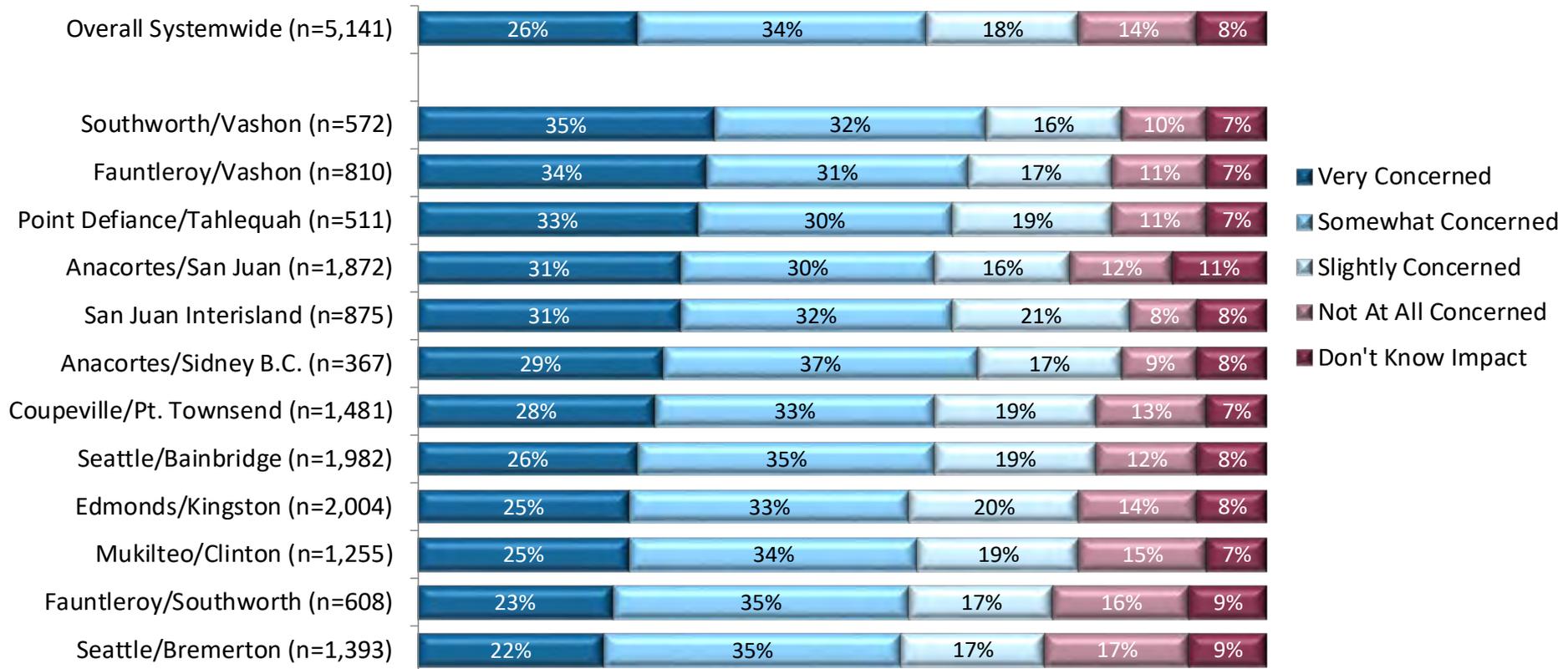
Q3 How concerned are you about **WSF's carbon footprint** and **WSF's general impact on the environment**? Would you say you are ... (select one)

# Attitudes Towards WSF



For the most part, riders of all routes have the some level of concern over WSF carbon footprint.

## Concern Over WSF's Carbon Footprint



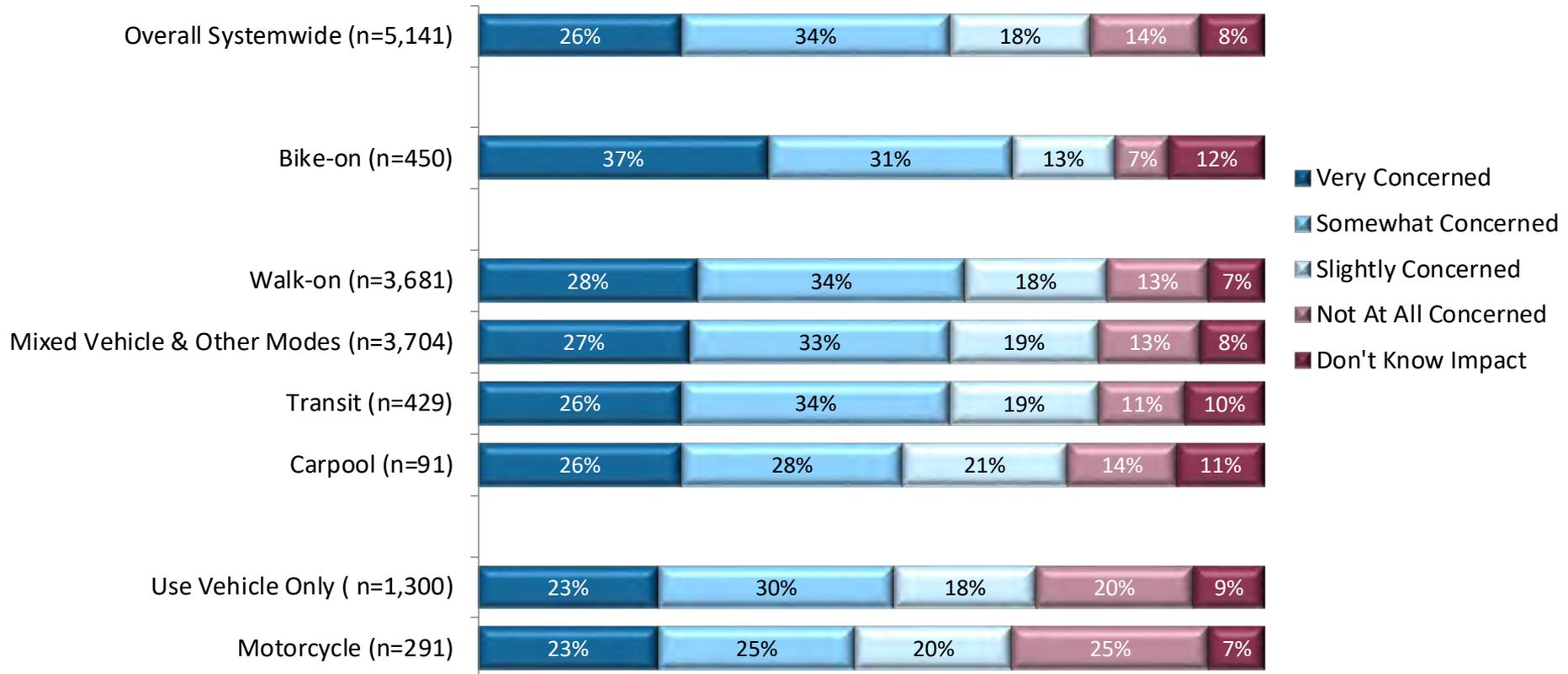
Q3 How concerned are you about WSF's carbon footprint and WSF's general impact on the environment? Would you say you are ... (select one)

# Attitudes Towards WSF



Those that ride a bicycle onto the ferries have the highest concern for WSF's carbon footprint. Those that only drive on and motorcycle riders have the lowest level of concern for WSF carbon footprint.

## Concern Over WSF's Carbon Footprint



Q3 How concerned are you about **WSF's carbon footprint** and **WSF's general impact on the environment**? Would you say you are ... (select one)



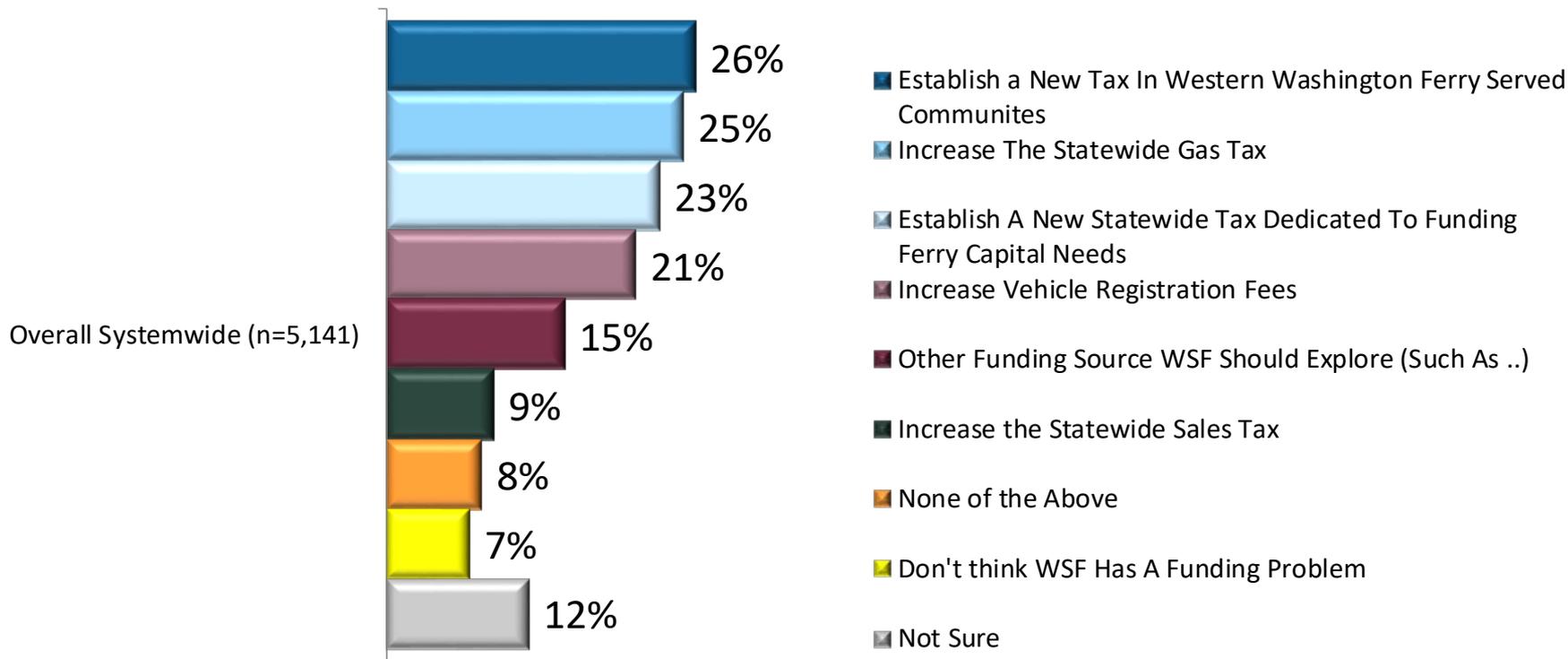
# Attitudes Towards WSF Funding

# Attitudes Towards WSF Funding



When asked to recommend a funding source for long-term capital needs, “establishing a new tax in Western WA ferry served communities” and “increase the statewide gas tax” received the most mentions. They are followed by “establish a new statewide tax dedicated to funding ferry capital needs” and “increase vehicle registration fees.” Seven percent (7%) do not feel WSF has a funding problem and 12% are not sure.

## Funding Source Recommended to be Explored



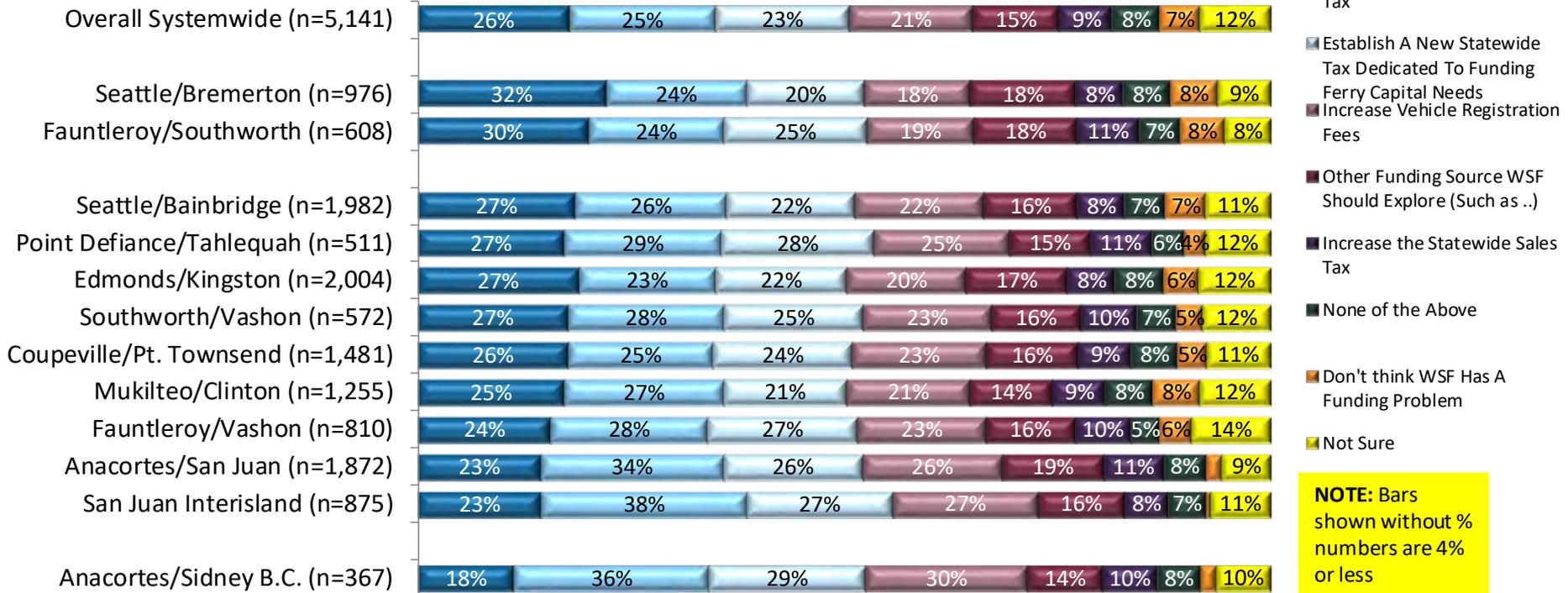
Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you **recommend be explored and possibly considered to fund the long-term capital needs** of the ferry system? (Please check as many as you would like to see used)

# Attitudes Towards WSF Funding



Establishing a new tax in Western WA ferry served communities tends to be mentioned more often by Seattle/Bremerton as well as Fauntleroy/Southworth riders and least often by Anacortes/Sidney B.C. riders.

## Funding Source Recommended to be Explored (Ranked by Est. New Ferry District Tax)



**NOTE:** Bars shown without % numbers are 4% or less

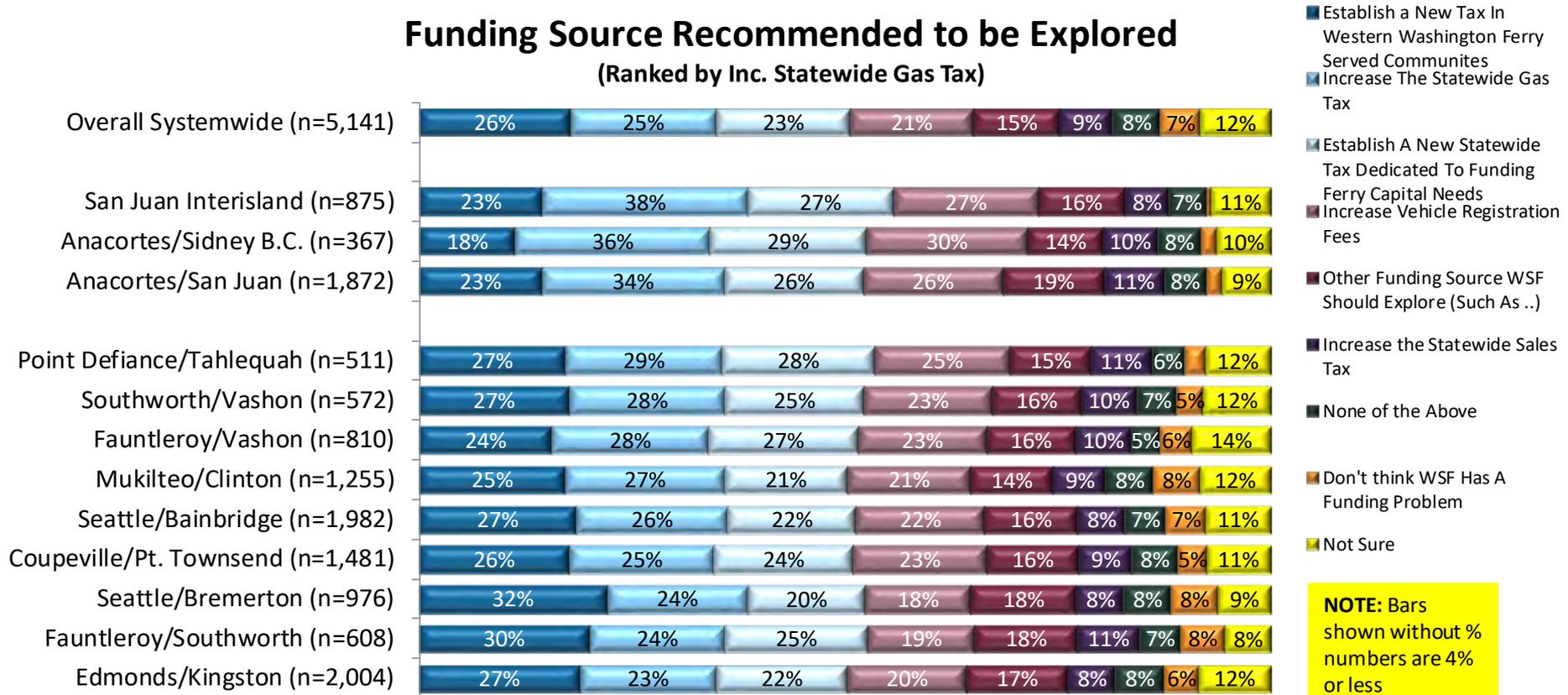
Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you recommend be explored and possibly considered to fund the long-term capital needs of the ferry system? (Please check as many as you would like to see used)

# Attitudes Towards WSF Funding



Increasing the statewide gas tax tends to be mentioned more often by the San Juan routes.

## Funding Source Recommended to be Explored (Ranked by Inc. Statewide Gas Tax)



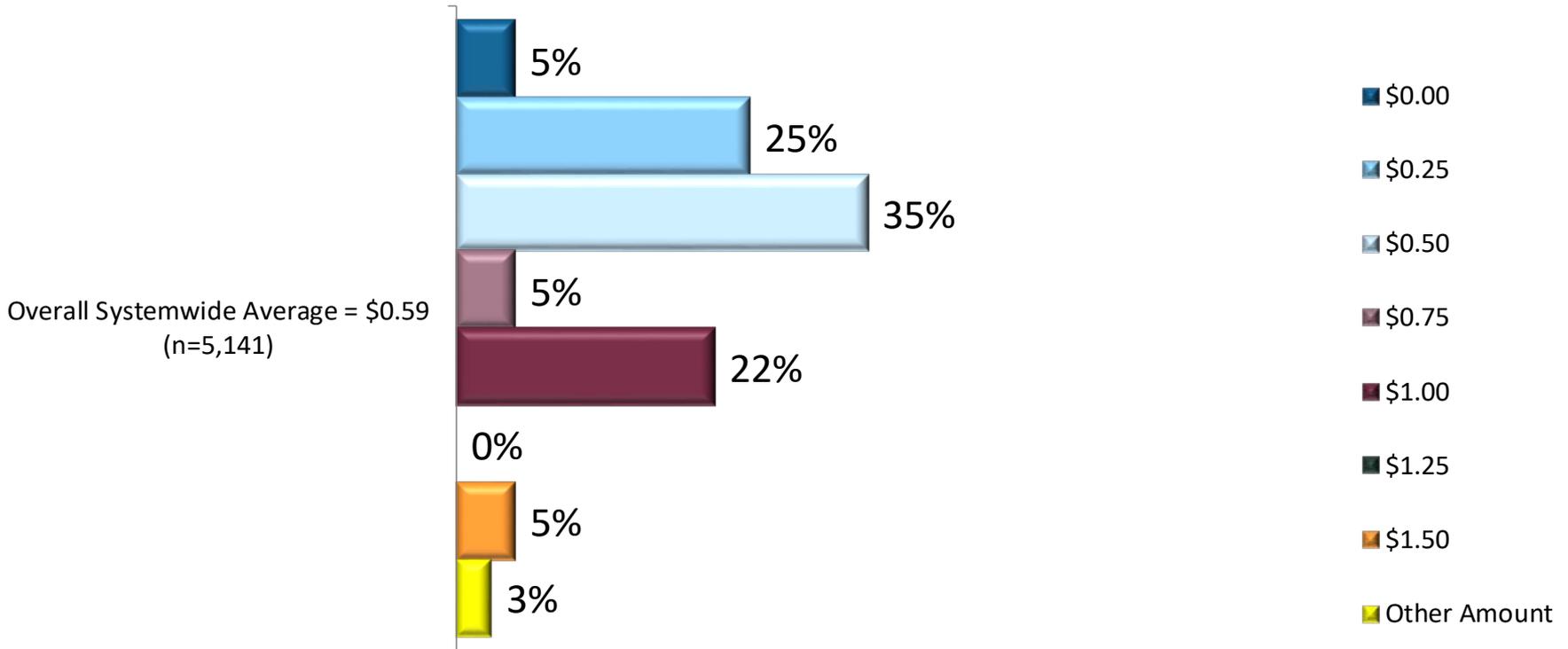
Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.). Which of the following increases in funding sources, if any, would you recommend be explored and possibly considered to fund the long-term capital needs of the ferry system? (Please check as many as you would like to see used)

# Attitudes Towards WSF Funding



Riders on average said \$0.59 when asked how much more they would be willing to pay, provided the funds continue to be dedicated to new ferries. Five percent said zero while five percent said \$1.50 with twenty-two percent saying \$1.00. The largest group said fifty cents.

## Willing to Pay Per Ticket If Dedicated to New Ferries



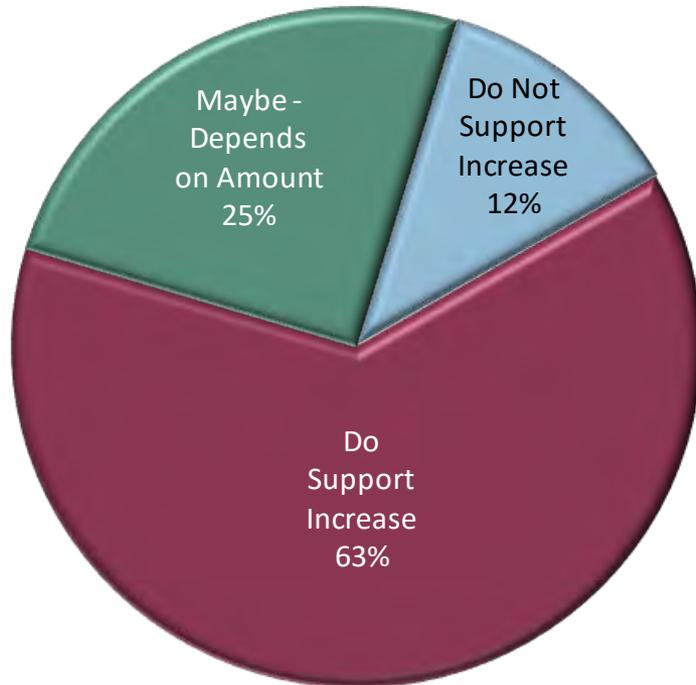
Q5 Currently a surcharge of \$0.25 per ticket is dedicated to help fund new ferries. How much more would you be willing to pay, provided this funding continues to be dedicated to new ferries?

# Attitudes Towards WSF Funding



Six in ten (63%) support increasing the surcharge when given a short description of what the \$0.25 raises plus what the cost of a new 144-car ferry is. In contrast 12% said no and 25% said it depended on the amount of the surcharge. This time when given the same surcharge fee points, the average increased to \$0.73 from the pre-description \$0.59 average. Most notable, the \$0.00 and \$0.25 levels dropped while all other amounts increased from their pre-statement figures.

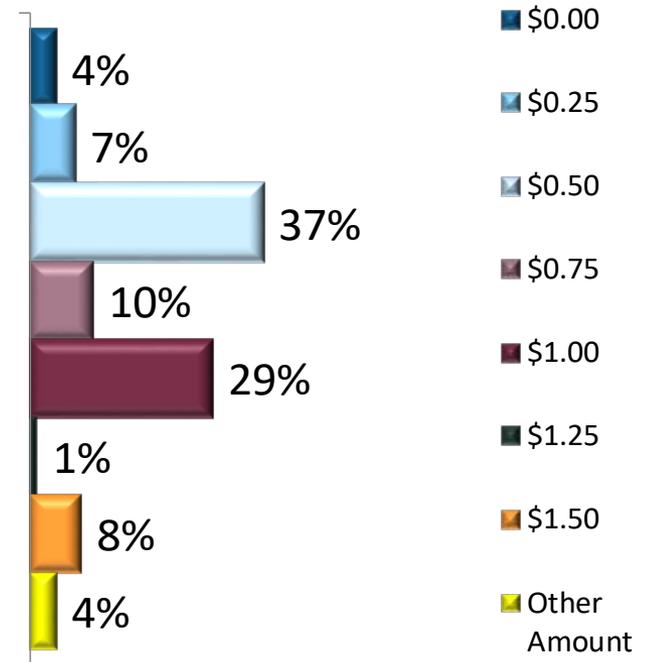
**Level of Support for Surcharge**  
(n=5,141)



Everyone Asked

Overall Systemwide Average = \$0.73 (n=5,141)

**Willing to Pay Per Ticket After Reading Statement**



Q6a At \$.025 per ticket the surcharge will raise about \$4 million per year. The cost of a new 144-car ferry costs about \$150 million. Knowing this, would you support the surcharge of \$0.25 per ticket being increased if it continues to be dedicated to new ferries? Q6b Up to what amount could you support the surcharge being increased to?



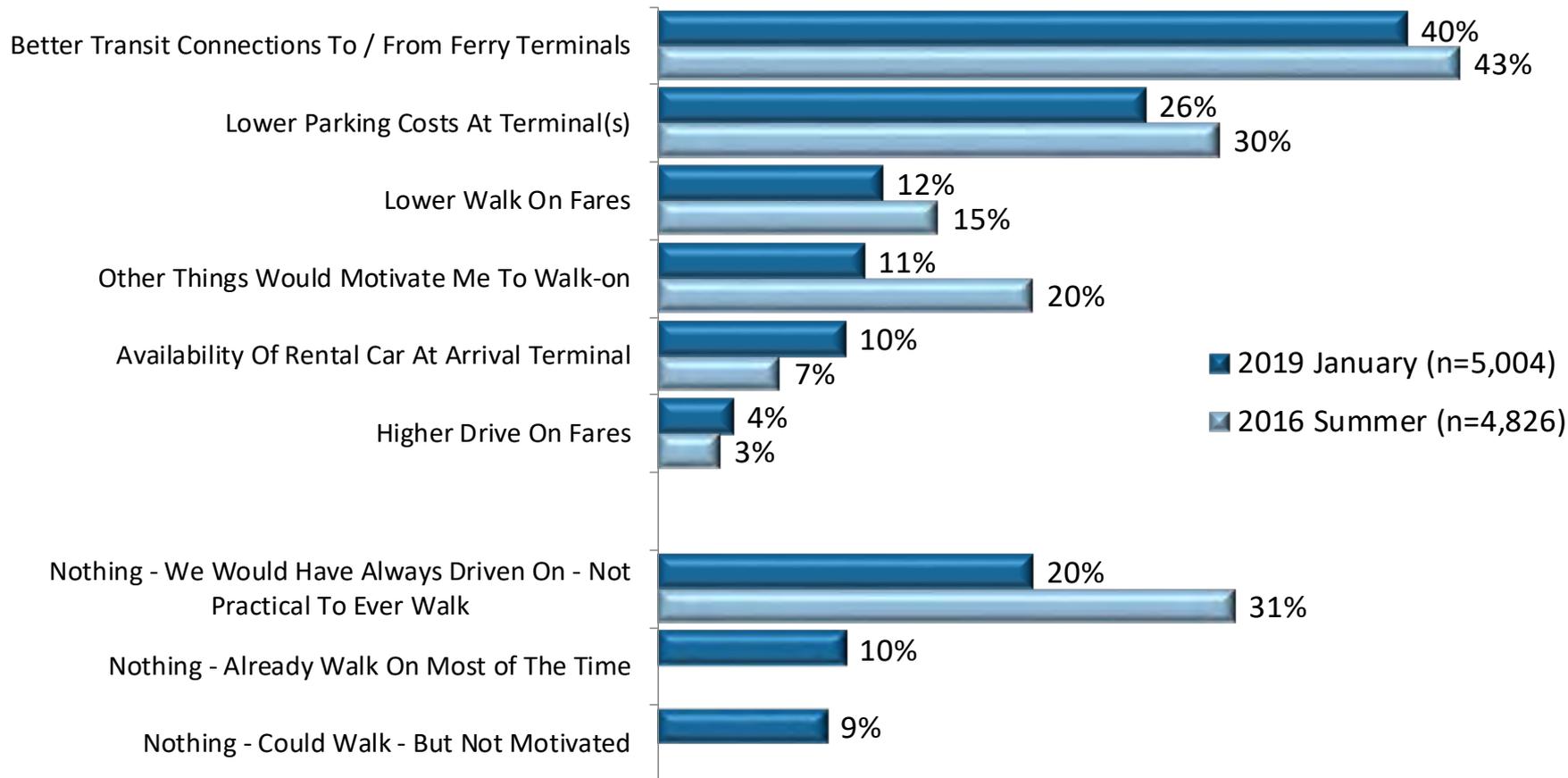
# Methods For Encouraging Walk-on Behavior

# Methods For Encouraging Walk-on Behavior



Better transit connections to and from ferry terminals was the top mentioned method of encouraging walk-ons by respondents both in 2019 and in 2016 when the question was first asked. Similar to 2016, the second most mentioned encouragement for walking on was “lower parking costs at terminal(s).”

## Encourage Walk-on Behavior – From General List of Options



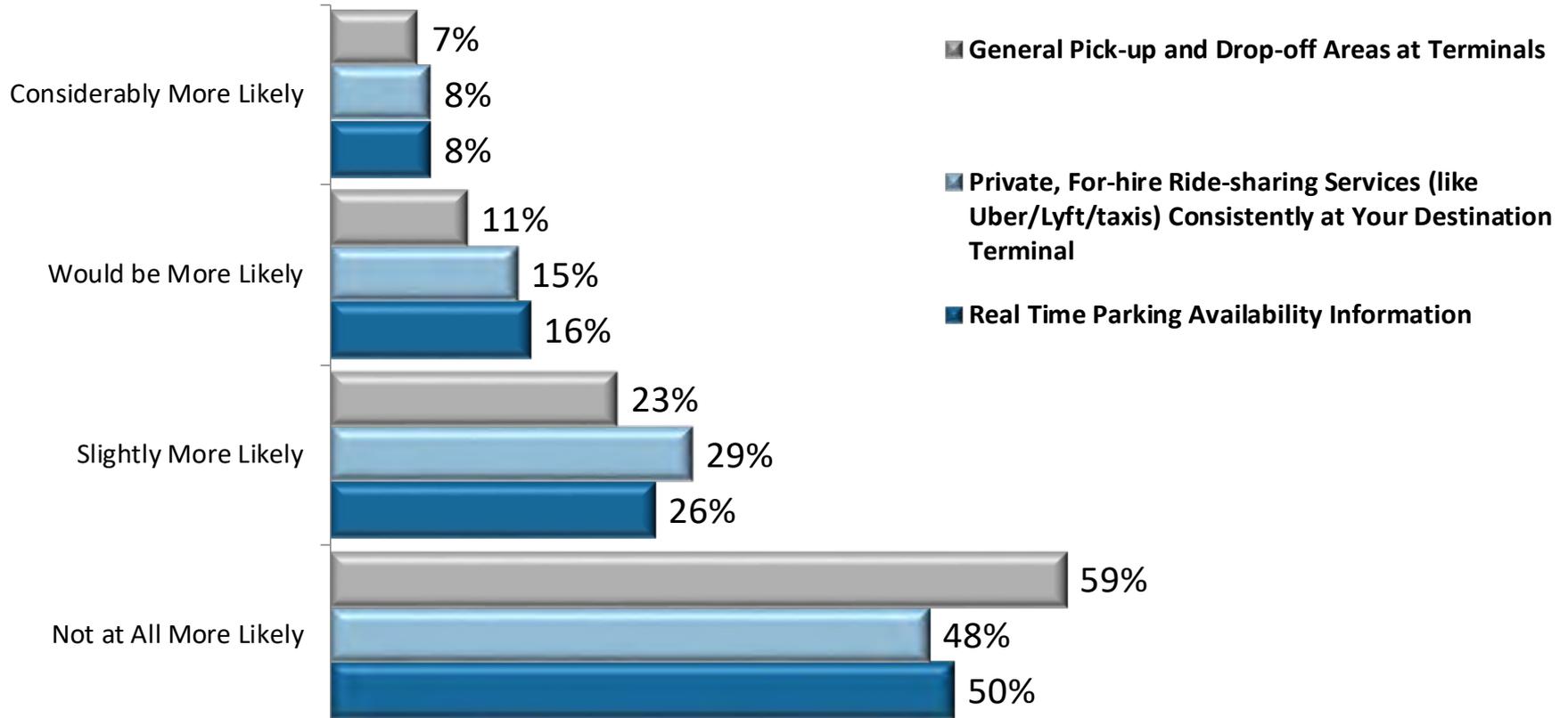
Q15 What, if anything, would encourage you to walk on rather than drive on?

# Methods For Encouraging Walk-on Behavior



Having private, for-hire ride-share services consistently at your destination terminal and real time parking availability information made about half of all riders who drive a vehicle onto the ferries more likely to consider walking on.

## Encourage Walk-on Behavior By Improving/Providing ... (All Riders Who Drove On at Least Once n=5,004)



Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

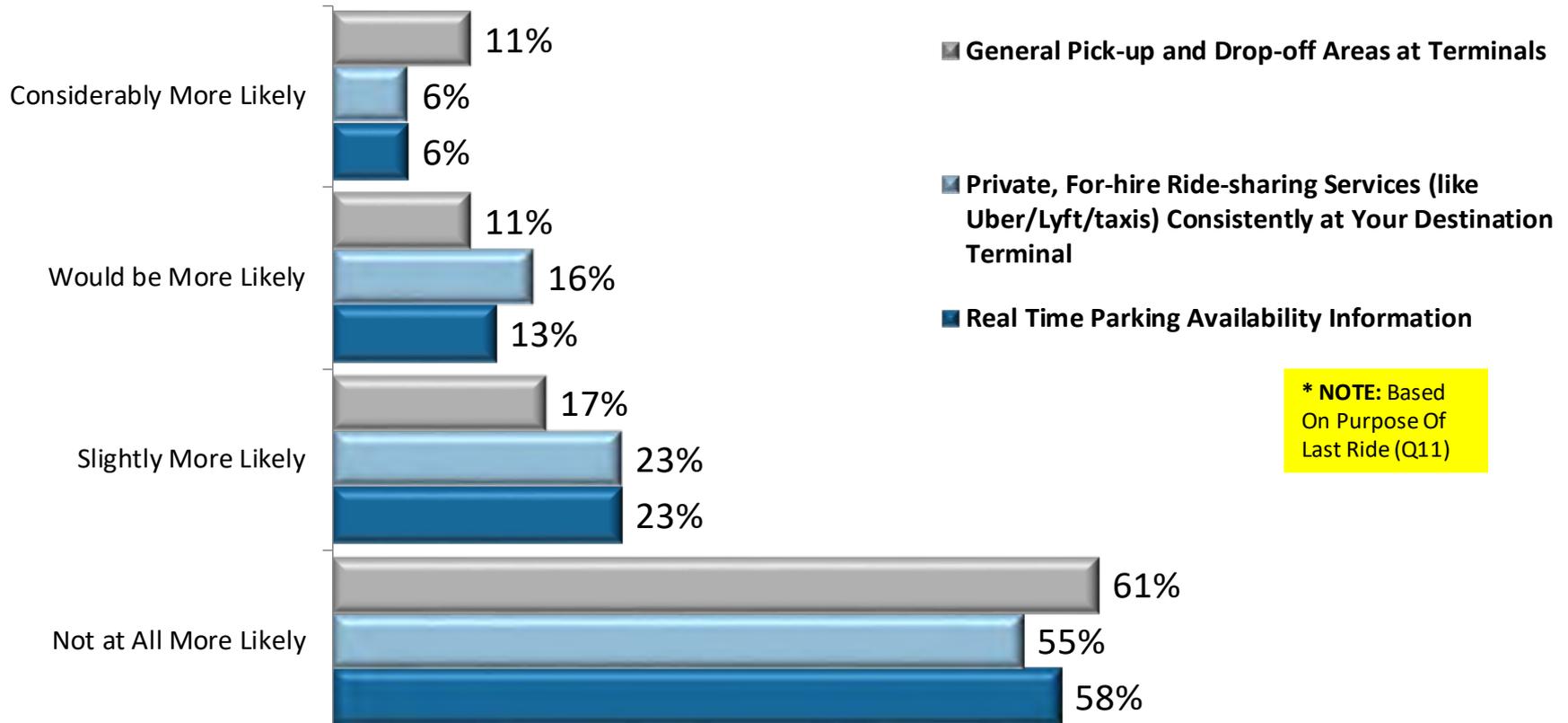
# Methods For Encouraging Walk-on Behavior



Commuter riders who drove on at least once are less likely to be encouraged to walk-on than the general ridership, particularly for “private for-hire ride-sharing services consistently at your destination terminal” and “real time parking availability information.”

## Encourage Walk-on Behavior By Improving/Providing ...

(All Commuter Riders\* Who Drove On at Least Once n=963)



\* NOTE: Based On Purpose Of Last Ride (Q11)

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

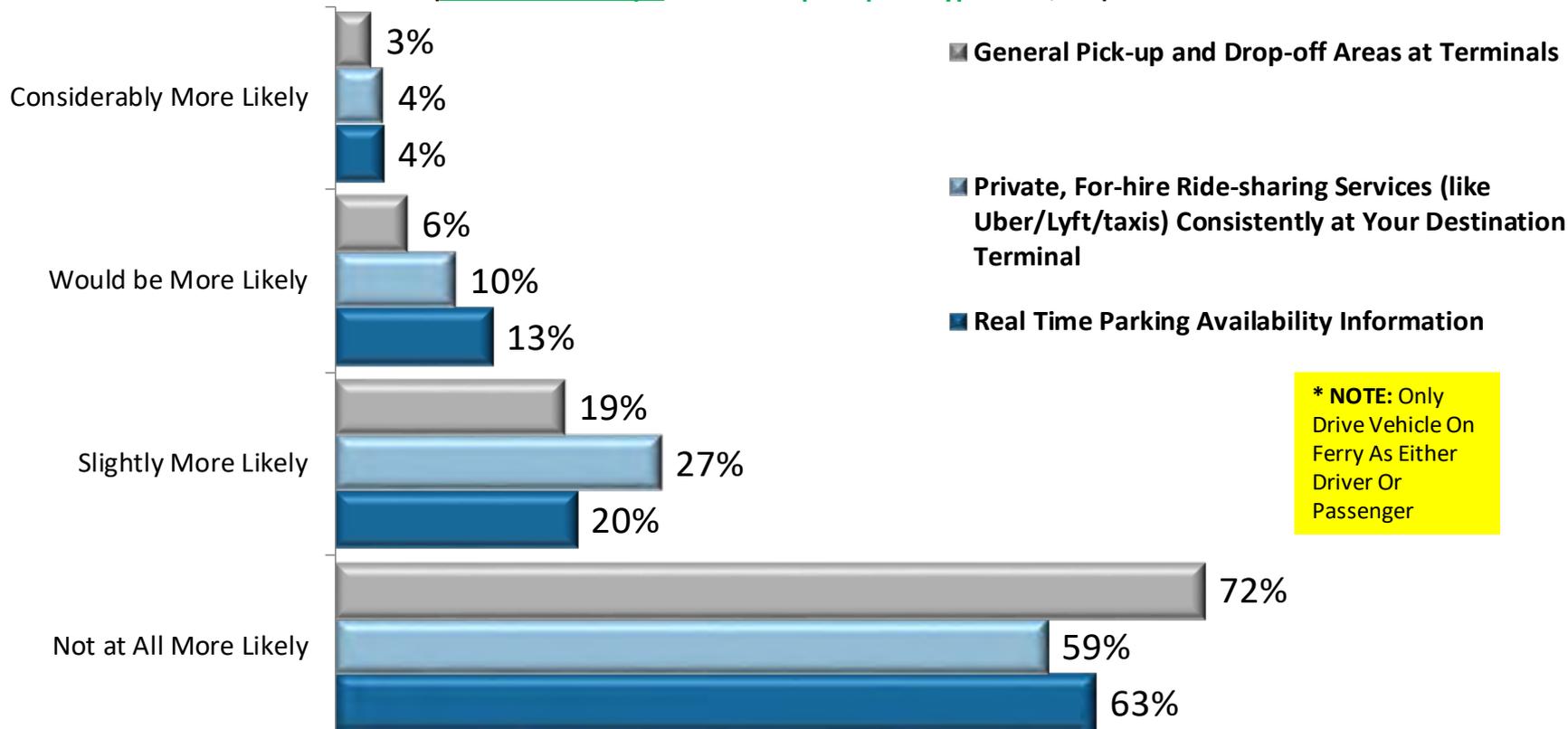
# Methods For Encouraging Walk-on Behavior



Vehicle only users are less motivated by any of the three options tested than all riders. For-hire ride sharing (41%) and real time parking availability information (37%) might encourage four in ten vehicle only users to walk-on.

## Encourage Walk-on Behavior By Improving / Providing ...

(Use Vehicle Only\* – For All Trip Purpose Types n=1,300)



\* NOTE: Only Drive Vehicle On Ferry As Either Driver Or Passenger

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

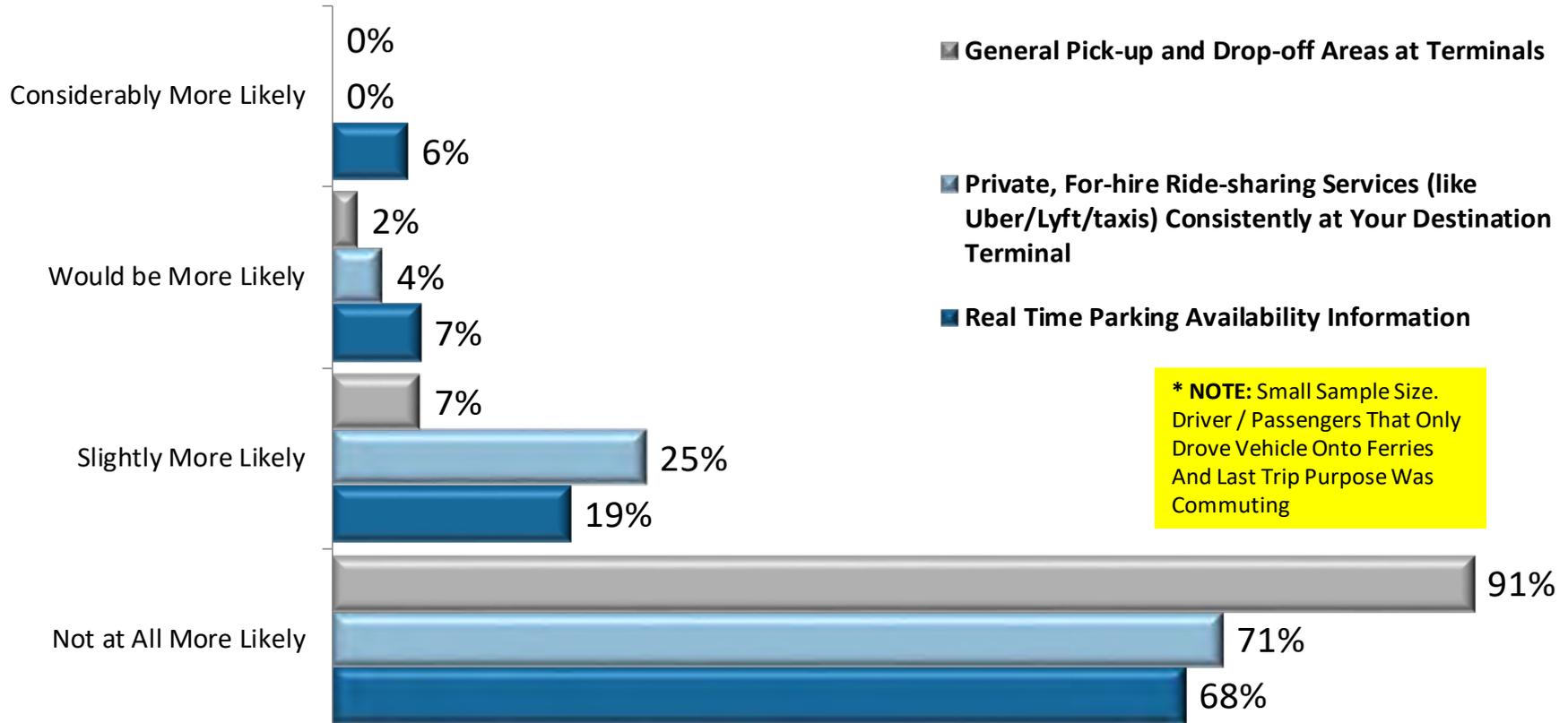
# Methods For Encouraging Walk-on Behavior



Encouragement was lower for all three aspects for commuters who only drive on. Of the three methods, general pickup and drop off areas at terminals would not encourage any walk-on behavior.

## Encourage Walk-on Behavior By Improving / Providing ...

(Use Vehicle Only – Last Trip Was For Commuting N=95\*)



Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

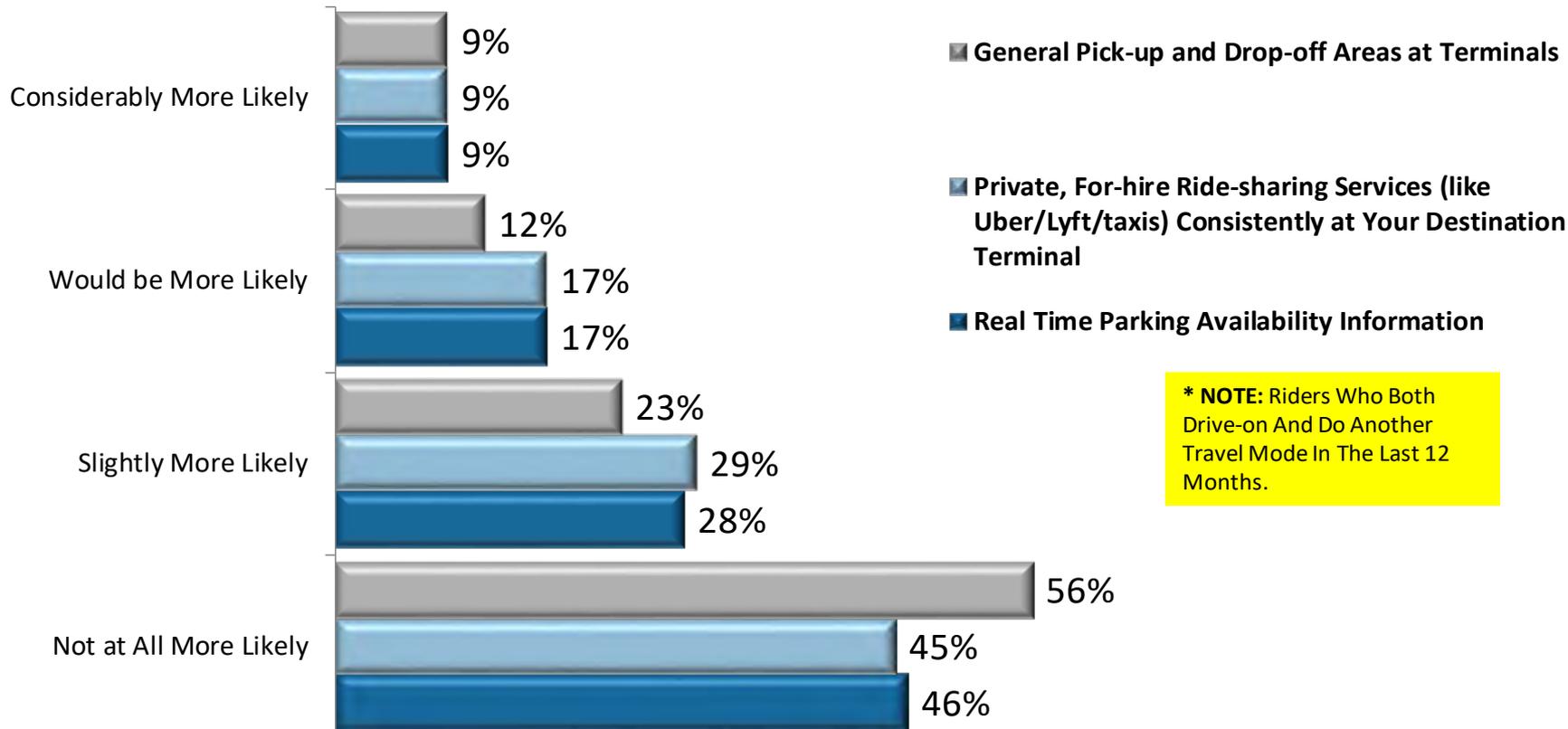
# Methods For Encouraging Walk-on Behavior



Riders who use multiple modes of transportation on Ferries are more encouraged than average by all three options. For-hire ride share (55%) and real time parking availability information (54%) encouraged mixed mode users the most.

## Encourage Walk-on Behavior By Improving / Providing ...

(Multi-modal - Mixed Vehicle & Other Modes Used\* – For All Trip Purpose Types n=3,704)



\* NOTE: Riders Who Both Drive-on And Do Another Travel Mode In The Last 12 Months.

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

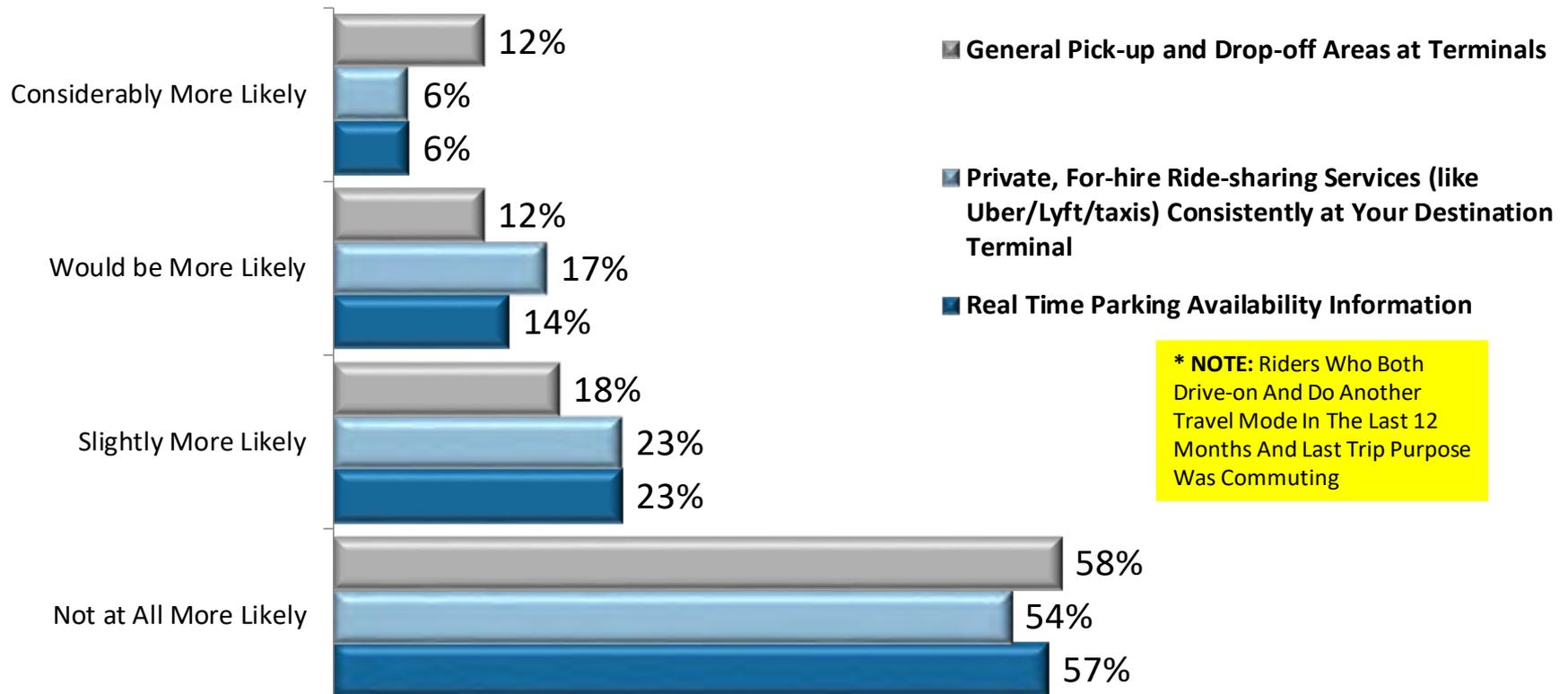
# Methods For Encouraging Walk-on Behavior



Approximately four in ten of those commuters that drive on as well as some other mode would be encouraged to walk-on more for any one of the three aspects. This group had a higher likelihood of walking on for the general pickup and drop off areas at terminals aspect.

## Encourage Walk-on Behavior By Improving/Providing ...

(Multi-modal - Mixed Vehicle/Other Modes Used\* - Last Trip Was For Commuting n=868)



\* NOTE: Riders Who Both Drive-on And Do Another Travel Mode In The Last 12 Months And Last Trip Purpose Was Commuting

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

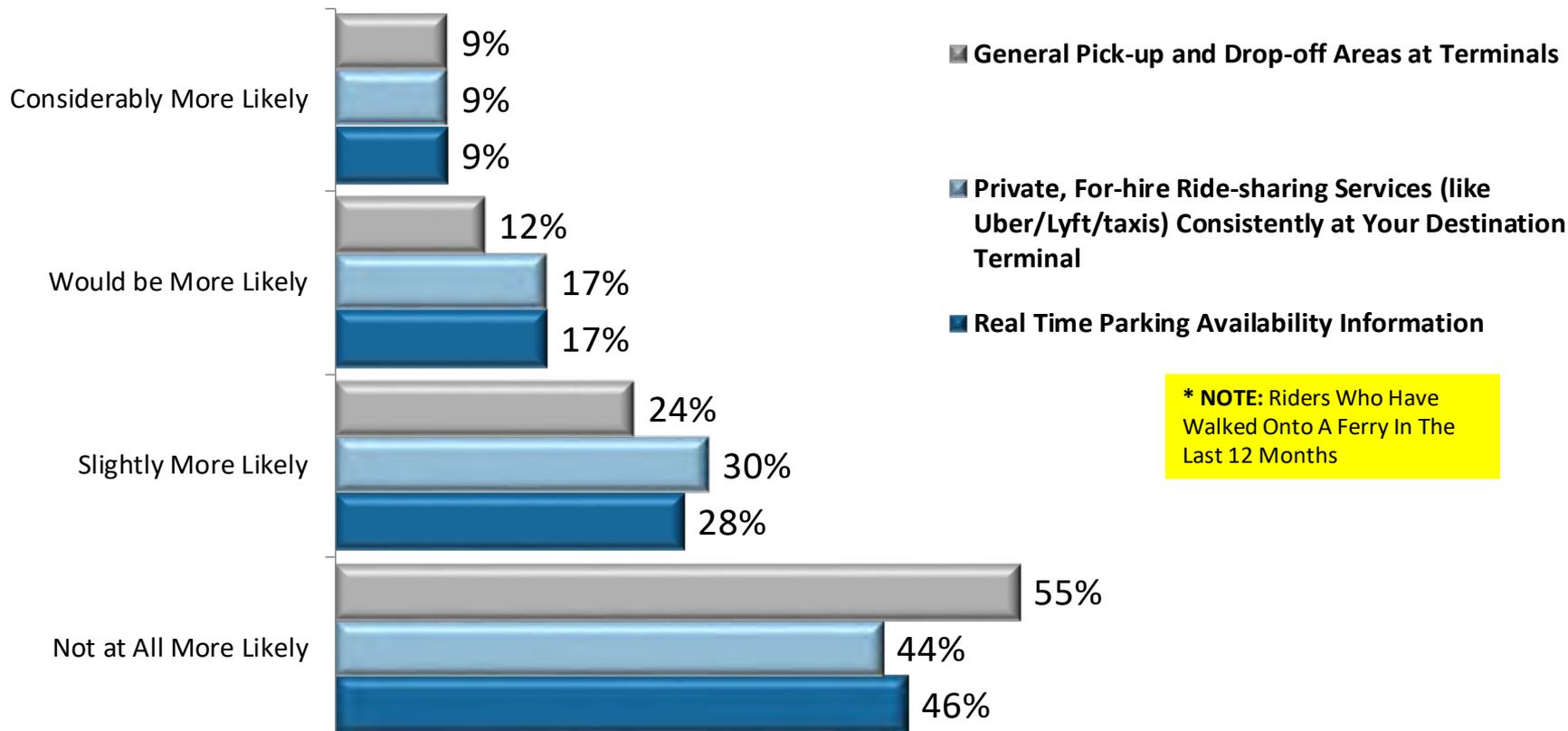
# Methods For Encouraging Walk-on Behavior



Walk-on riders are more encouraged to continue walking on if improvements are made in for-hire ride-sharing (56%) and real time parking availability information (54%).

## Encourage Walk-on Behavior By Improving / Providing ...

(Walk-on Sometimes\* - For All Trip Purpose Types n=3,983)



\* NOTE: Riders Who Have Walked Onto A Ferry In The Last 12 Months

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

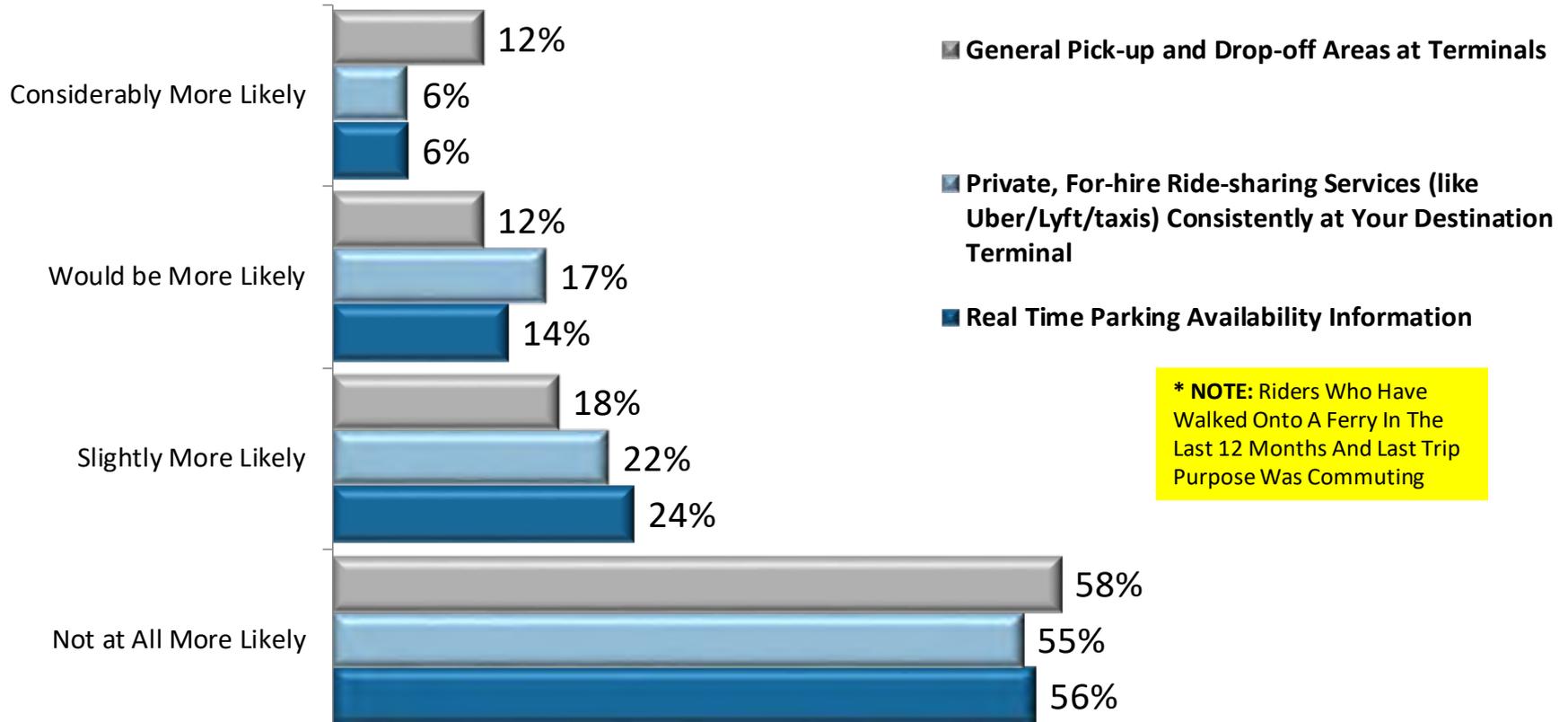
# Methods For Encouraging Walk-on Behavior



Walk-on riders whose last ride was for commuting purposes are less encouraged by all three options than those that walk-on for any purpose. All three options encouraged about four in ten walk-on commuter riders.

## Encourage Walk-on Behavior By Improving / Providing ...

(Walk-on Sometimes\* - Last Trip Was For Commuting n=840)



\* NOTE: Riders Who Have Walked Onto A Ferry In The Last 12 Months And Last Trip Purpose Was Commuting

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

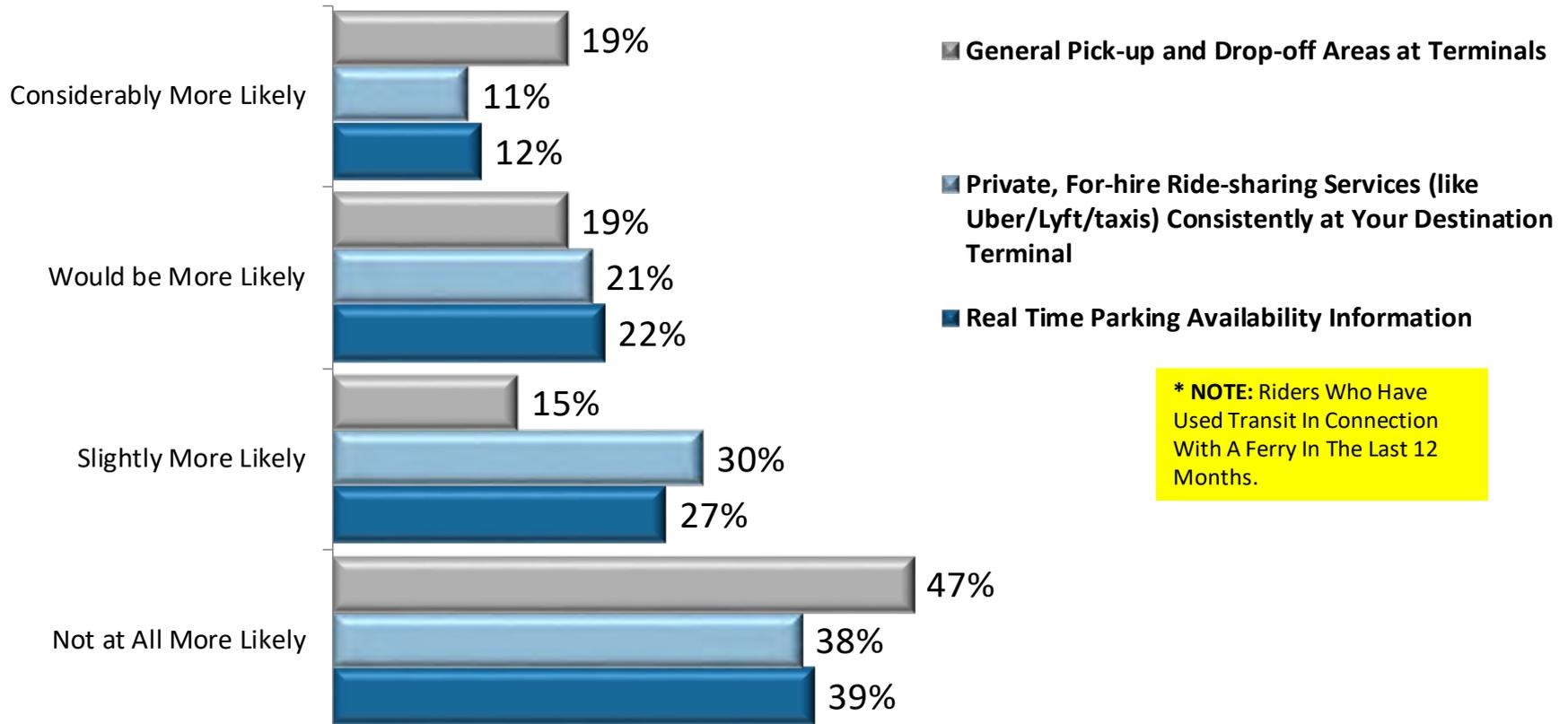
# Methods For Encouraging Walk-on Behavior



Over six in ten transit users are encouraged by the for-hire ride sharing option (62%) and real time parking availability information (61%) to walk-on.

## Encourage Walk-on Behavior By Improving / Providing ...

(Use Transit Sometimes\* – For All Trip Purpose Types n=422)



\* NOTE: Riders Who Have Used Transit In Connection With A Ferry In The Last 12 Months.

Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

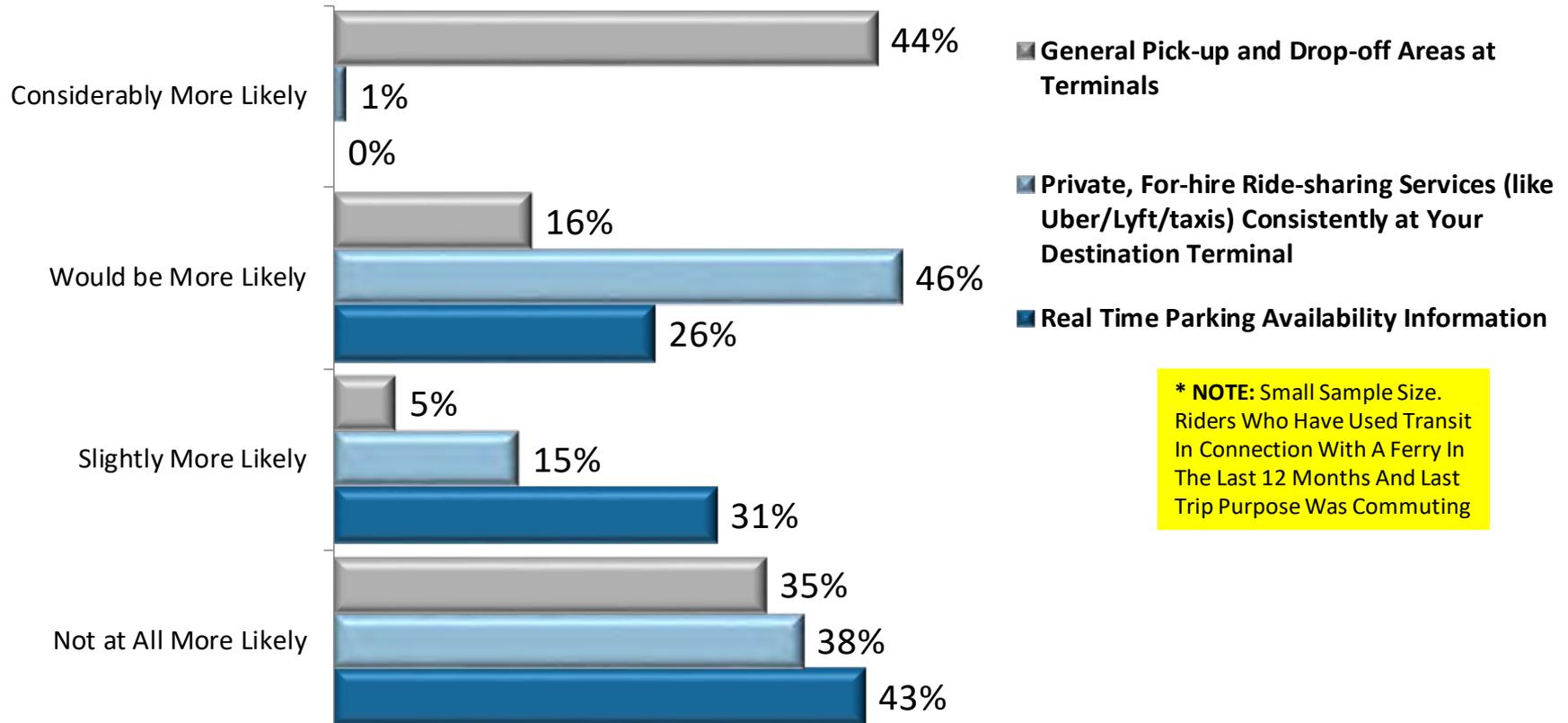
# Methods For Encouraging Walk-on Behavior



Even with a small sample size the data would suggest that all three options would encourage walk-on behavior for those riders who use transit in combination with ferries to commute to work.

## Encourage Walk-on Behavior By Improving / Providing ...

(Use Transit Sometimes\* – Last Trip Was For Commuting n=82)



**\* NOTE:** Small Sample Size. Riders Who Have Used Transit In Connection With A Ferry In The Last 12 Months And Last Trip Purpose Was Commuting

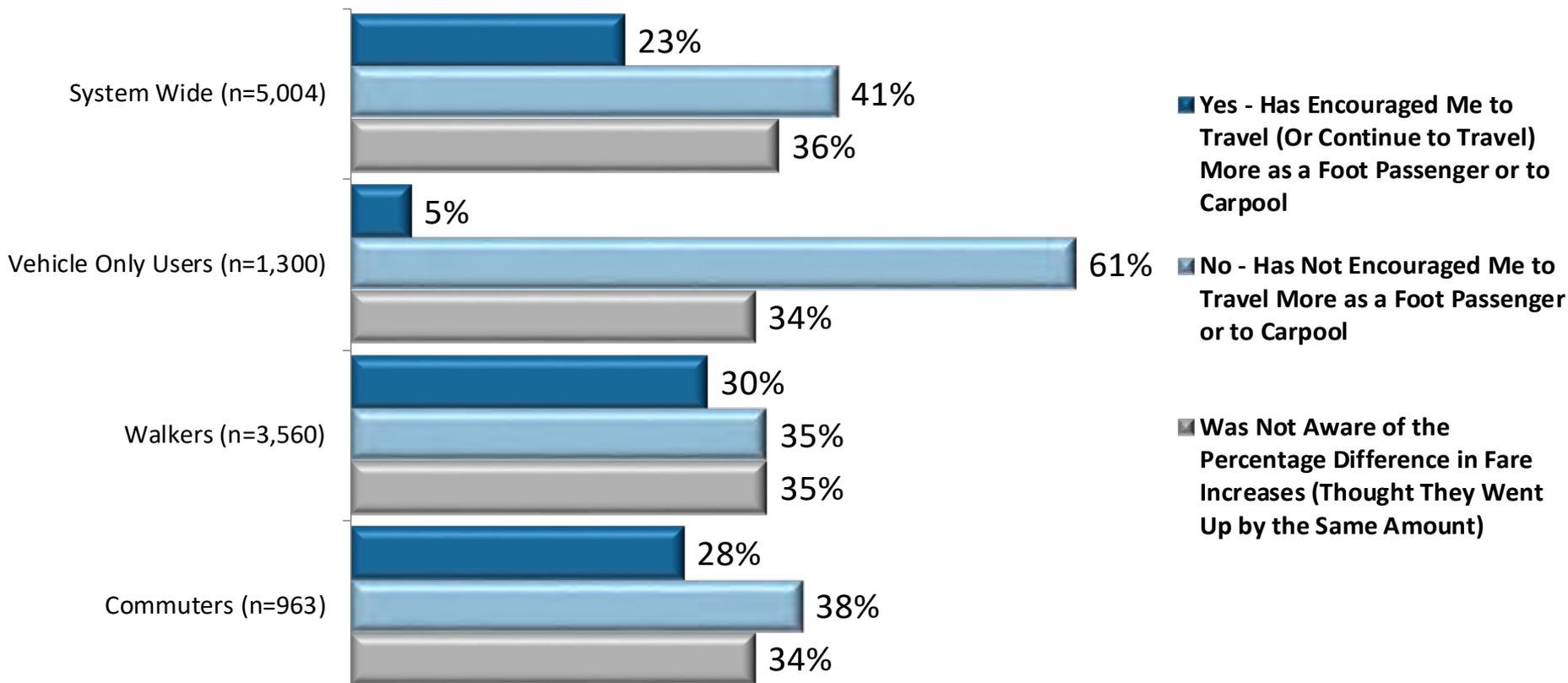
Q16/17/18 Would you be more likely to walk onto the ferry if ... (Q16) **the general pick-up and drop-off areas at terminals were improved?** (Q17) **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** (Q18) **there was real time parking availability information?** Would you say you would be.. (select one)

# Methods For Encouraging Walk-on Behavior



One in four riders systemwide feel the impact of a lower passenger to vehicle increase fare percentage has encouraged walk-on behavior. In comparison 5% of riders who only drive on said it did while three in ten walkers and commuters said it did. About one in three systemwide, and in each group, were not aware of the percentage difference in fare increases.

## Impact of Lower Passenger to Vehicle Increase Fare Percentage on Encouraging Walk-on Behavior



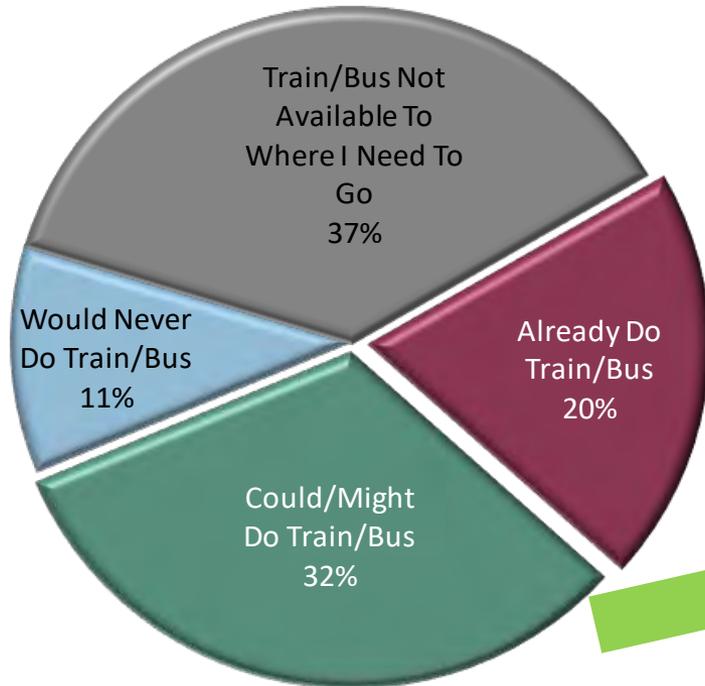
Q19 Over the past few years, passenger fares have been going up at a lower rate than vehicle fares. Has this encouraged you, or not, to travel more as a foot passenger or to carpool?

# Methods For Encouraging Walk-on Behavior

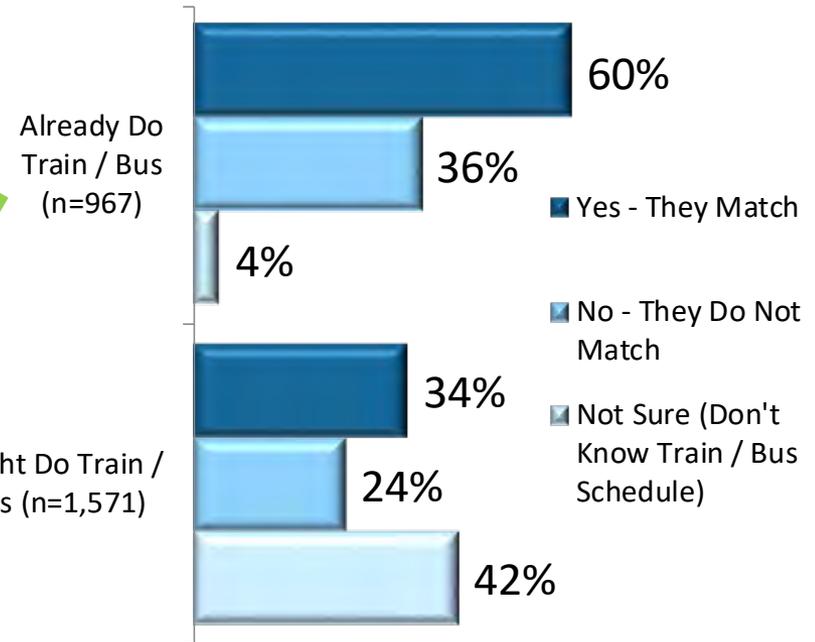


About half of all riders (52%) use or could use a train / bus in combination with the ferries. Over four in ten (41%) of those that already do use a train / bus do not feel the schedule adequately matches up with their train / bus connection (37%) or are unsure (4%). In comparison, 66% of those that might do a train / bus either feel it does not match up (24%) or are unsure (42%).

**Make Either a Train and/or Bus Connection As Part Of Your Trip**  
(n=5,141)



**Current Ferry Schedule Adequately Match Up With Train/Bus Connection**



Q20 Do you or could you **make either a train and/or bus connection** as part of your trip on the ferry? Would you say: 1) Already Do Train/Bus Today As Part Of My Ferry Travel, 2) Could/Might Do Train/Bus in The Future As Part Of My Ferry Travel, 3) I Would Never Do Train/Bus As Part Of My Ferry Travel (But It Is Available), or 4) Can't Do Train/Bus As They Are Not Available To Where I Need To Go? Q21 Does the current **ferry schedule** (departures/arrivals) on the route you take most often **adequately match up** with your needed (or potentially needed) **train or bus connection**?



# Passenger Only Ferry Service

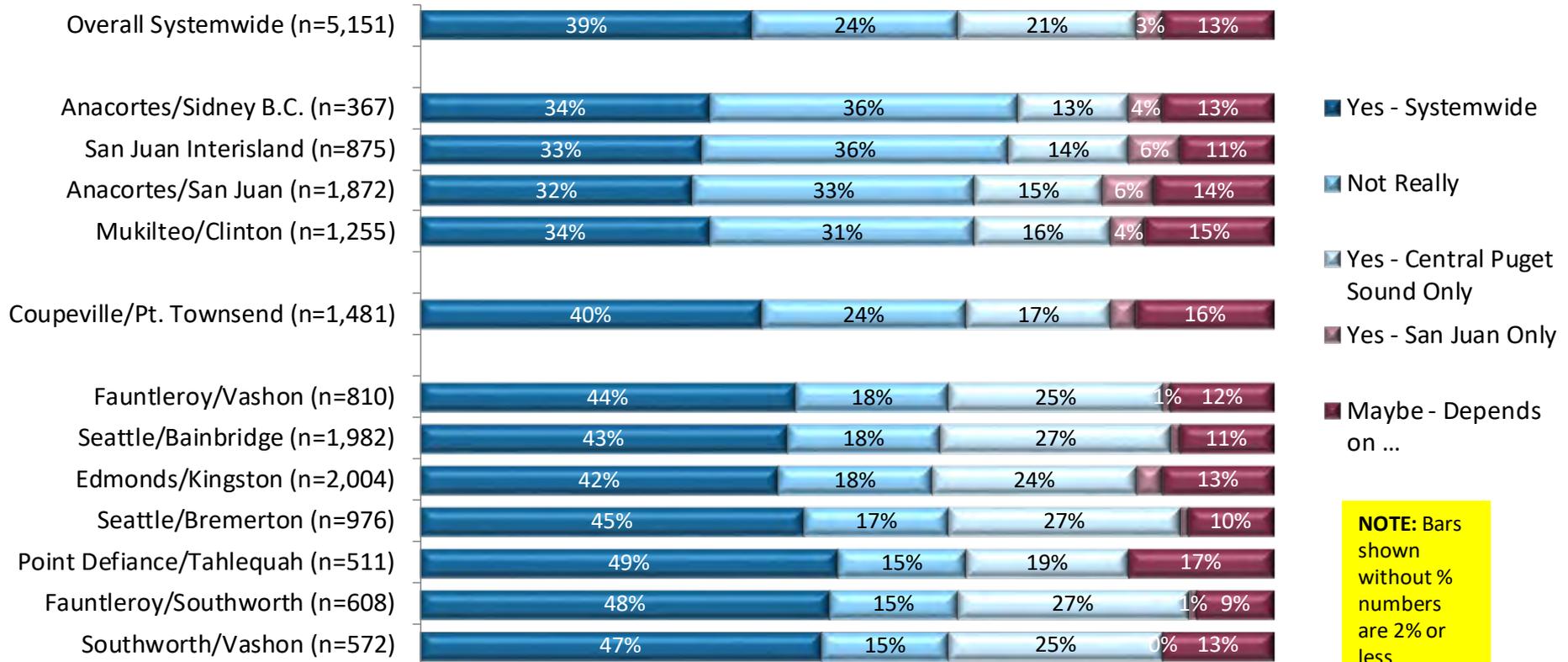
# Passenger Only Ferry Service



When asked if they would like to see passenger only ferry service expanded, one in four (24%) say “not really” throughout the WSF system. Most likely to say “not really” are riders on Anacortes/Sidney B.C. (36%), San Juan Interisland (36%), Anacortes/San Juan (33%), and Mukilteo/Clinton (31%).

## Expand Passenger Only Ferry Service

(Sorted by Not Really Response)



**NOTE:** Bars shown without % numbers are 2% or less

Q22 Would you like to see **passenger only ferry service** expanded throughout the Puget Sound (including the in San Juans)?

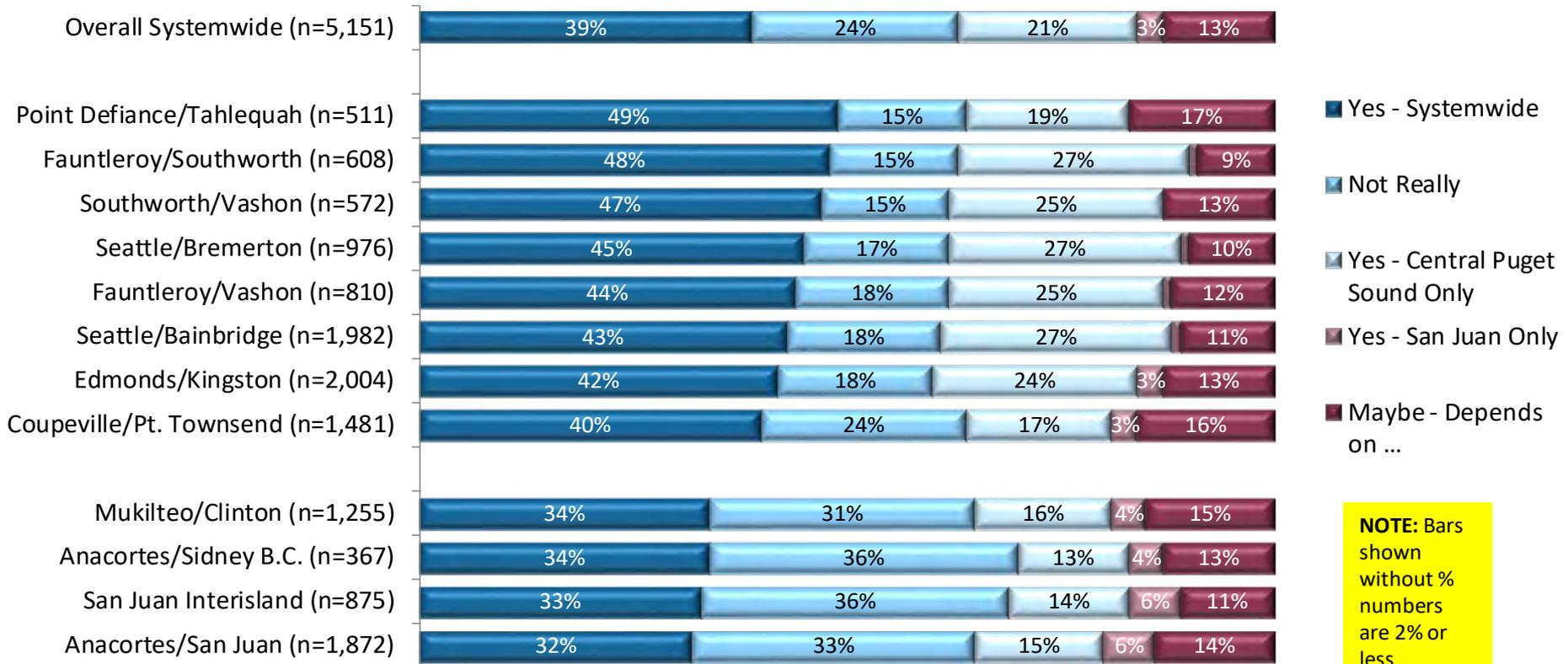
# Passenger Only Ferry Service



When asked if they would like to see passenger only ferry service expanded, four in ten (39%) say “yes and that it should be systemwide.” Systemwide desire is highest in the Point Defiance/Tahlequah (49%), Fautleroy/Southworth (48%), and Southworth/Vashon routes (47%). Yes for just central Puget Sound is highest among riders on Fautleroy/Southworth (27%), Seattle/Bremerton (27%), and Seattle/Bainbridge (27%).

## Expand Passenger Only Ferry Service

(Sorted by Yes – Systemwide Response)



**NOTE:** Bars shown without % numbers are 2% or less

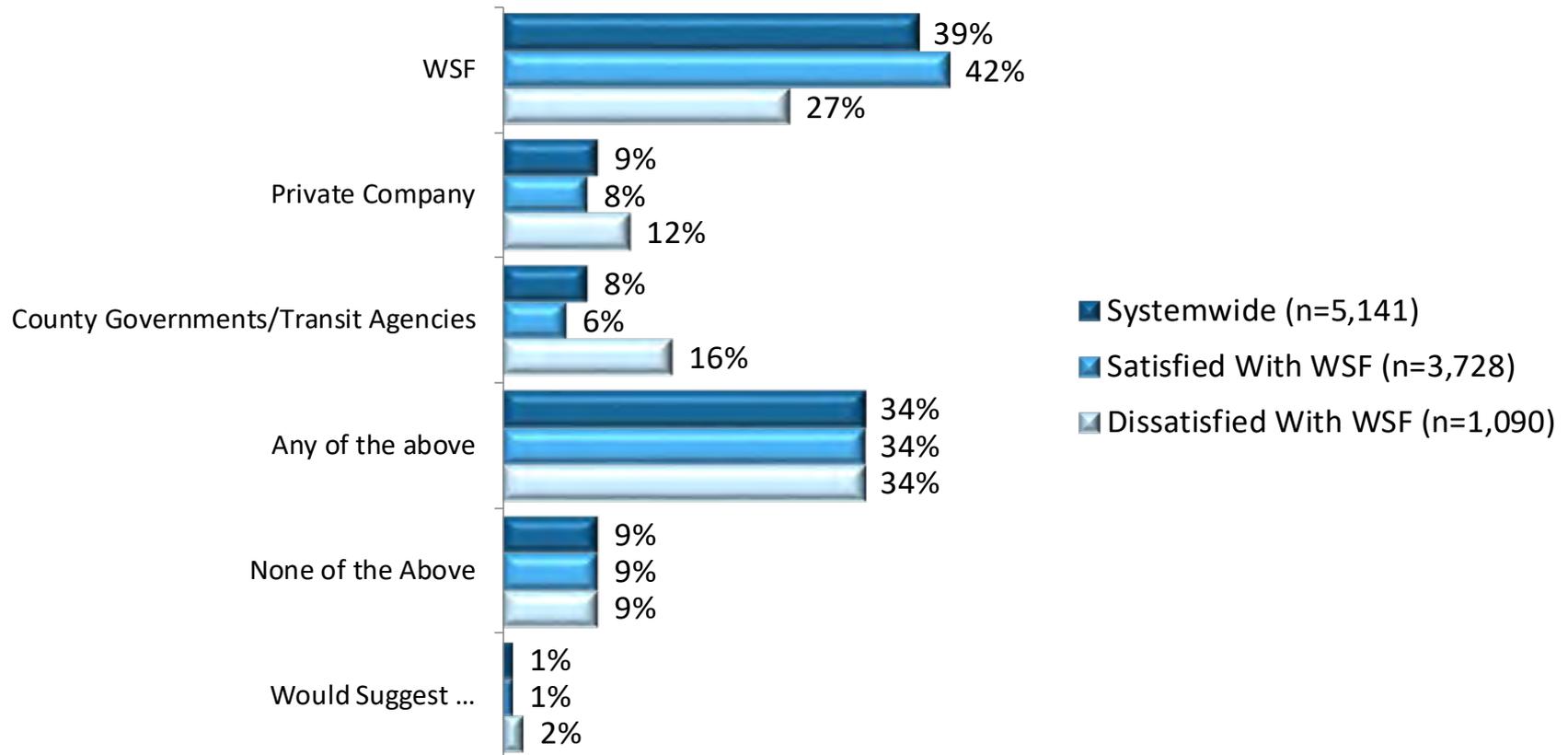
Q22 Would you like to see passenger only ferry service expanded throughout the Puget Sound (including the in San Juans)?

# Passenger Only Ferry Service



Four in ten (39%) say they would want WSF to operate the fleet of passenger only vessels. Those dissatisfied with WSF were more likely to mention “County Government / Transit Agencies (16%) than those satisfied with WSF (6%).

## Most Want To Operate Passenger Only Vessels



Q23 If a fleet of passenger only vessels were added to the routes that you typically use, who would you **most want to operate them**?



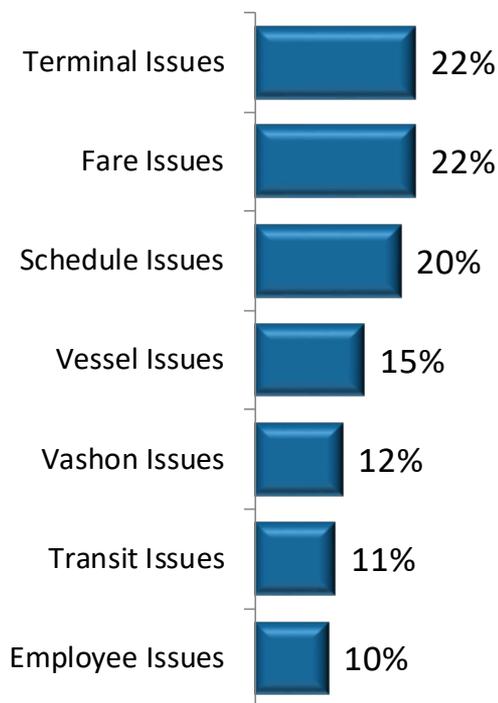
# Additional Policy Changes and Comments

# Additional Policy Changes



Four in ten (41%) of all respondents gave some sort of suggestion on WSF policy changes they would like to see. The recommendations were split evenly between Terminal Issues (22%), Fare Issues (22%) and Schedule Issues (20%).

## Suggested Policy Changes Top 7 Areas (n=2,414)



### ❖ Example comments included:

- WSDOT does not seem to like coordinating with local transit agencies much - local agencies seem to be the only ones adjusting their schedules to meet the WSDOT vessels.
- I've seen too many instances of people (in cars) cutting in ferry lines and the toll booth employees have no authority to have those people removed from lines.
- The Triangle route between Fauntleroy/Vashon/Southworth is clearly broken. There needs to be ways of loading faster (Good 2 Go, ticket bypass lane).
- Better coordination with light rail options are badly needed if you want to get people out of their cars. Also, there are NO parking options at Mukilteo; this is a terrible situation.
- Charge higher fares, build more ferries, add weekend service for passenger-only ferries, increase service hours on all routes.
- I understand WSF desire to make car fees higher and encourage walk-ons, but the car fees are far too expensive. Tourists should be charged a higher fee and non-commuters pay a surcharge.
- More finely divided fares according to vehicle length, to greater advantage smaller cars and trucks
- Discount for Whidbey Island residents. Cheaper parking monthly. Lower ferry fare. Passes that cover the whole month. Accurate wait times. Automated ticket booths so catching the ferry isn't dependent on how talkative the booth person is. More sailing to Whidbey and larger boats.
- I would expand the fleet by six new ferries to allow rotation of vessels for routine maintenance without causing disruption of ferry schedules. Two of the new ferries should be allocated as Stand by one to the San Juan Islands and one to Puget Sound so ferries do not have to be moved around and disrupt normal schedules.
- There needs to be more crossings per day to keep the waiting lines down.
- Better loading at Fauntleroy. We need two lanes. One for Vashon and one for Southworth. I realize that this is a challenge due to the narrow roadway. Add additional passenger only between Southworth and downtown.

Q24 What additional **suggestion or changes in WSF policy** would you like to offer WSF and state decision makers that you think would improve or strengthen the quality of service WSF provides?

# Additional Comments



*All respondents were asked if they had any additional thoughts regarding WSF or other transportation issues. Not surprisingly, given the WSF policy issues in the survey, most comments revolved around WSF.*

## ❖ Example comments included:

- Every taxpayer in WA should pay taxes to fund the ferries as part of our state highway system; we need tax increases to offset the loss of revenue resulting from Tim Eymen's deeply misguided and self-serving efforts to roll back taxes.
- Planning for new ferries should be a high priority for system-wide operations. Continue with improvements to existing terminals. Coordinate schedules with land transportation providers where ever possible.
- I realize the ferry workers are well trained....but I believe they could use additional training in customer service. I have seen them lose their tempers and treat customers rudely when it was unnecessary.
- Widen the walkways. Bring the loading/off-loading process into the 21st century. Thank you.
- Automation of toll booths; automated way of vehicle measurement, drive up verify passengers, and either automatic good to go pass read or swipe card to pay. Getting through the toll booths really slows things down. More reservations on routes would be great too, buy tickets in advance.
- Do not build more ferries designed like the ones on Coupeville Port Townsend route....poor design in many ways. What were you thinking? The old ones were better.
- The WSF system is not really accountable to anyone, thus also not to the public. The top officials should have to be elected or at least have an elected commission!
- The Samish has VERY uncomfortable bench seats. Please add to the specs for future ferries that the benches are padded on top of a firm FLAT surface. Also, the heating systems alternates heat and then COLD blowing out of the vents. Please eliminate the cold in the specs for future ferries if it can't be fixed on existing Olympic class boats (Samish in particular).
- I attended the open house for long range plan and the argument made from the audience for keeping the Tillicum on the San Juan interisland instead of the Sealth was compelling. It should be given significant review.
- Fund the development of legitimate ridership models. Don't rely on dock workers estimates of loadings - put in place technology that will count vehicles - that is the only way you will ever truly know how to measure your resource (car spaces) performance.
- The mission of the ferry is to transport VEHICLES, not bikes or pedestrians. The routes are already crowded and the wait times are getting worse. Raise the fares and make the riders pay for the new ferries, add more ferries to each route. A designated Good To Go lane at ticketing would expedite that. Better crew training for loading and unloading so it happens much faster.

Q25 Do you have any **additional thoughts regarding the ferry system** or **Washington state's transportation system** you would like to share?



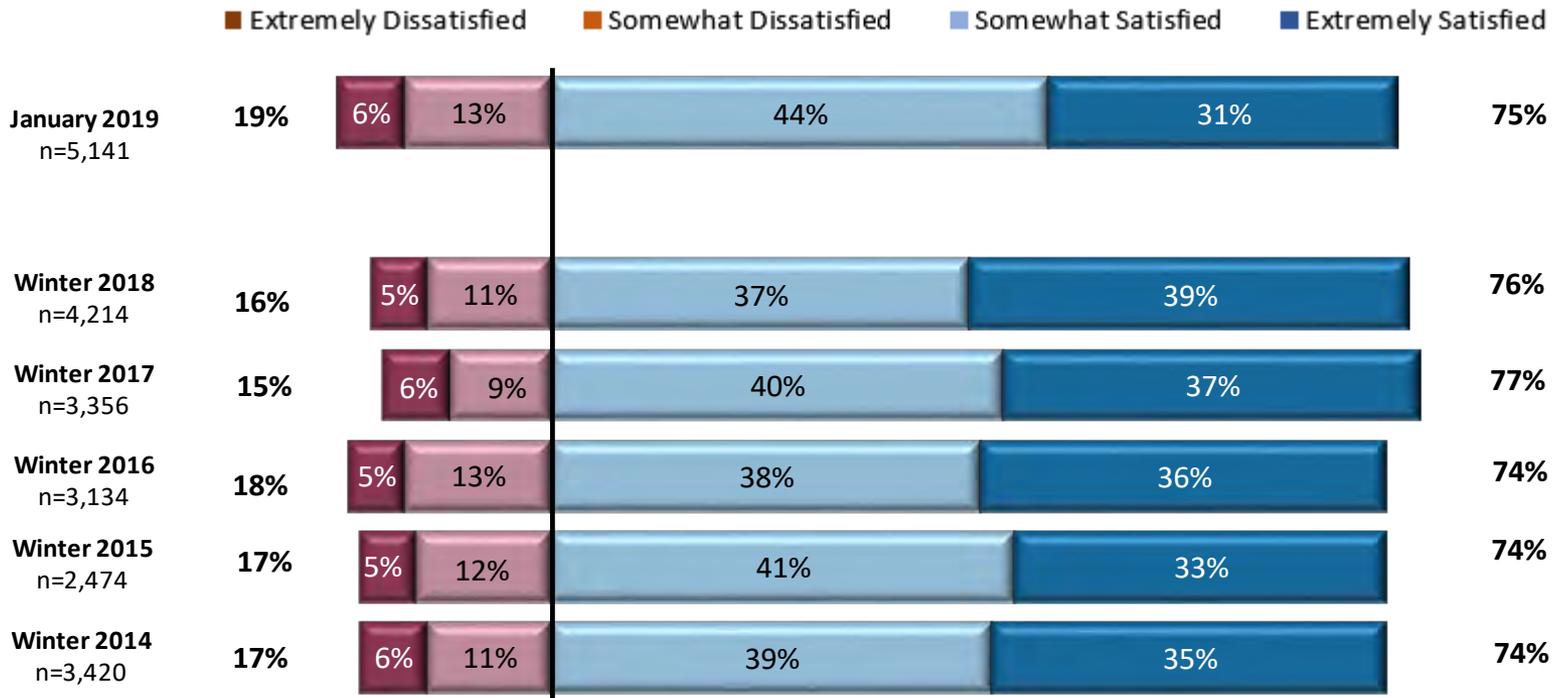
# Satisfaction With WSF

# Satisfaction With WSF



Overall satisfaction (75%) with the service provided by WSF is strong (44% Satisfied / 31% Extremely Satisfied) and is consistent with Winter 2018. Dissatisfaction increased 3 percentage points in 2019 to 19%, with slightly more extremely dissatisfied (+1% point) and somewhat dissatisfied (+2% points).

## Overall Satisfaction with WSF



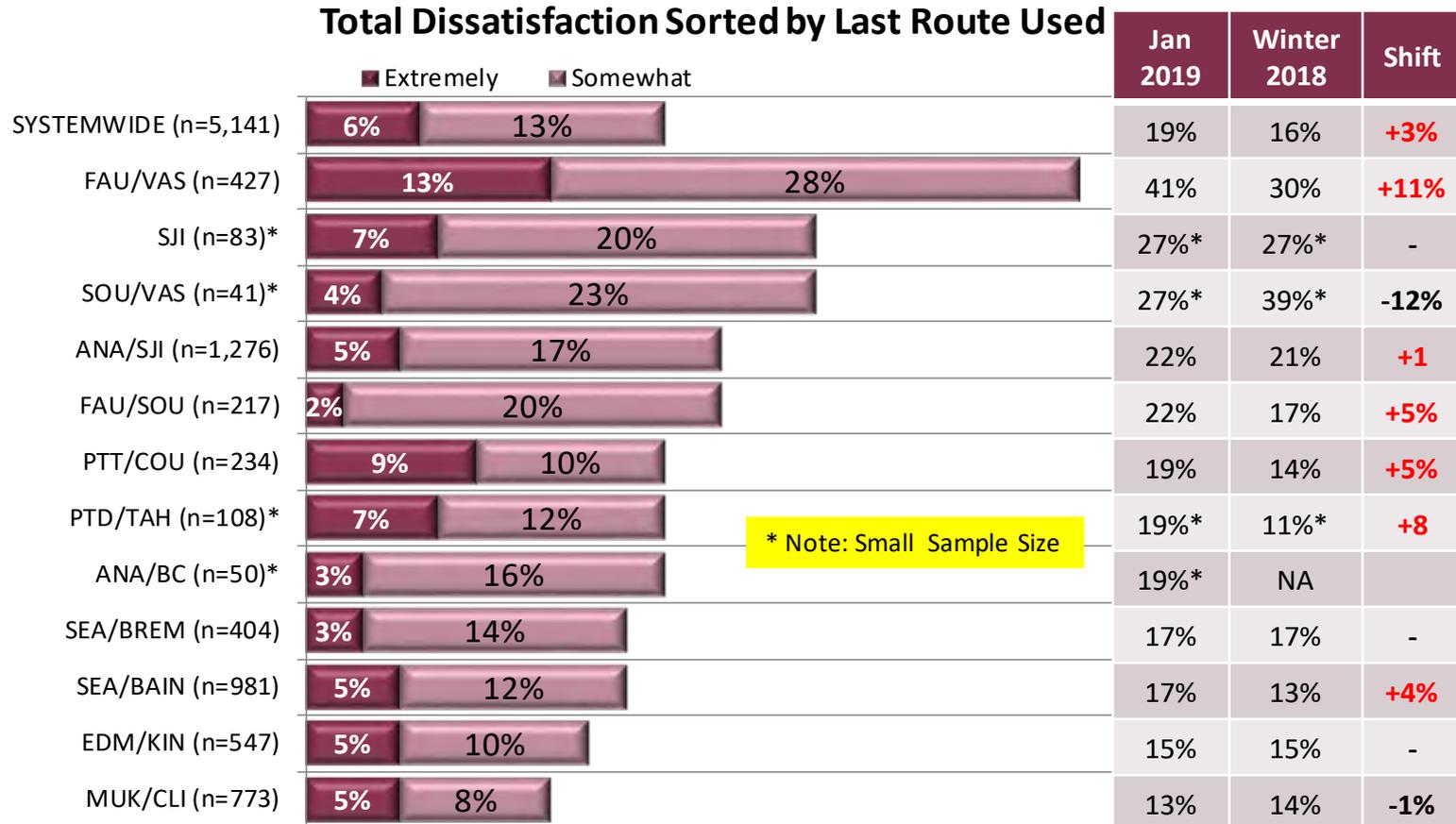
Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.  
The **bold** percentages represent the corresponding total dissatisfaction/satisfaction

Q7 All things considered, how satisfied are you with the service provided by Washington State Ferries?

# Satisfaction With WSF



Riders on the Fauntleroy/Vashon route saw the greatest negative increase in dissatisfaction (11% point raise) of those routes with large samples. Fauntleroy/Southworth and Port Townsend/Coupeville both had a negative 5% point raise in dissatisfaction over winter 2018 scores.



Q7 All things considered, how satisfied are you with the service provided by Washington State Ferries (by last route ridden Q10)?

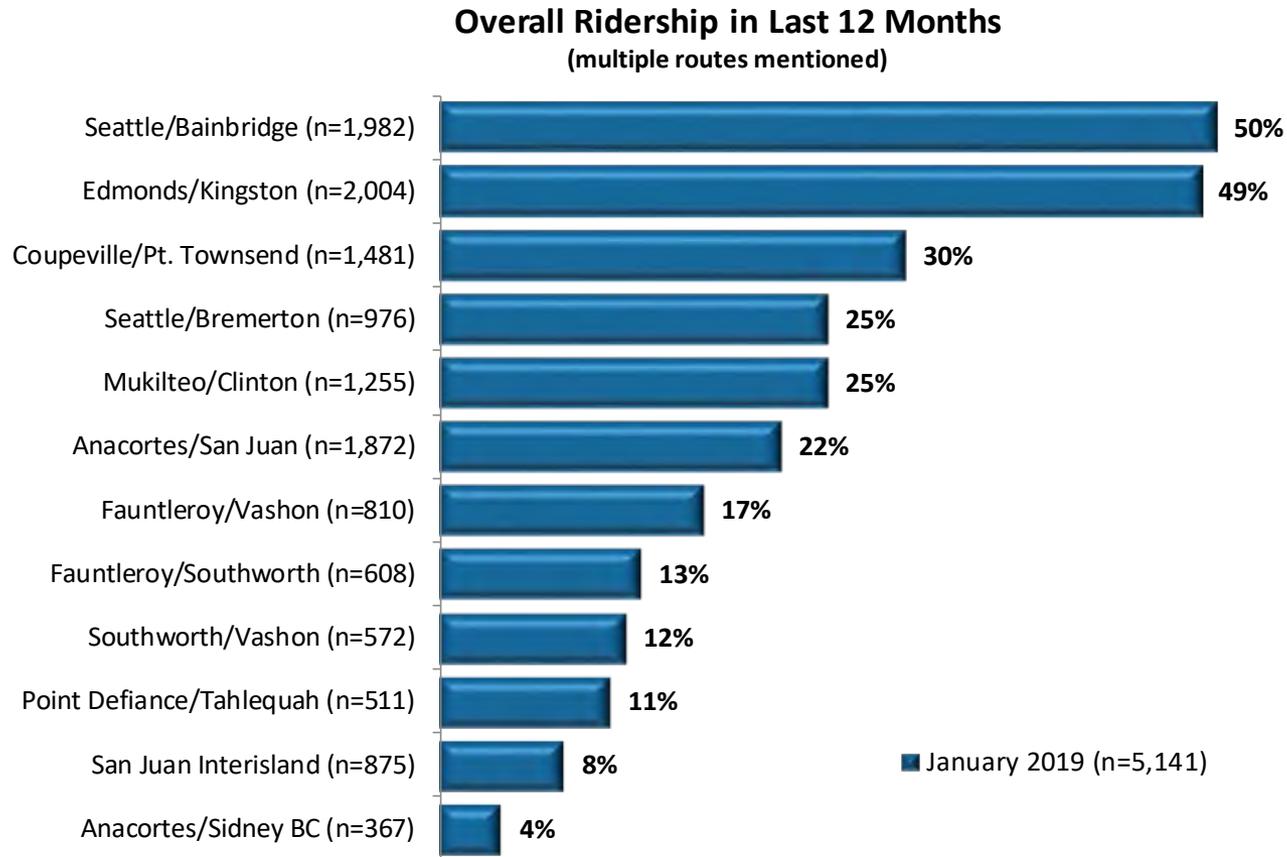


# Trips in the Last 12 Months

# 12 Month Ridership



When asked which routes they have ridden for any purpose in the last 12 months, approximately half have ridden the Seattle/Bainbridge (50%) and Edmonds/Kingston (49%). One in three (30%) have taken Coupeville/Port Townsend (30%) and one in four have taken Seattle/Bremerton (25%) and Mukilteo/Clinton (25%).



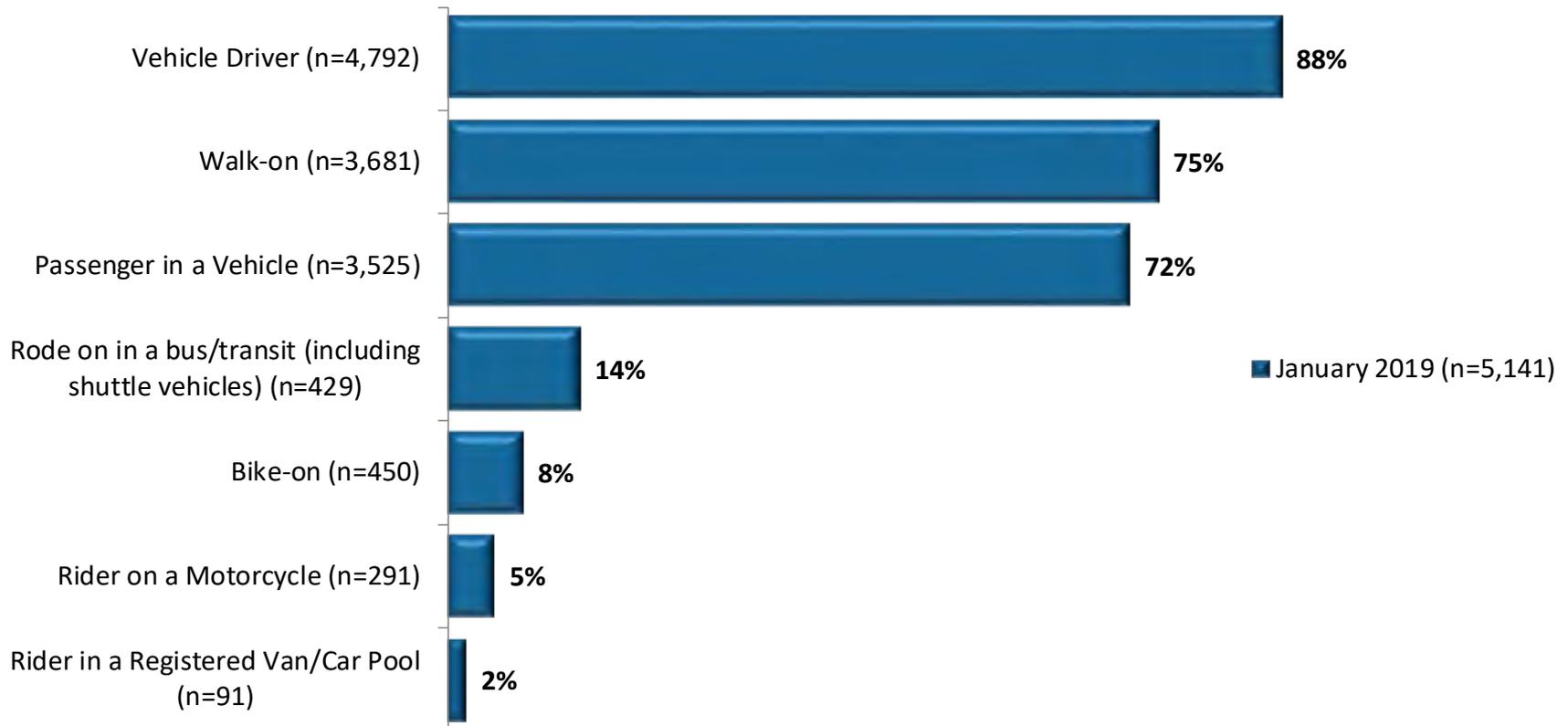
Q8 To get an idea of how people are using the ferry system: Which of the following route(s) have you ***ridden for ANY PURPOSE in the last 12 months?***

# 12 Month Boarding Methods



Almost nine in ten (88%) had been the driver in a vehicle in the last 12 months. Three out of four have been a walk-on (75%) or a passenger in a vehicle (72%) in the last 12 months. Bike-on was mentioned by one in ten people (8%) while 14% said they rode a bus / transit / shuttle vehicle in the last 12 months.

## Boarding Methods Used Over Last 12 Months



Q9 In the last 12 months, which of the following ways have you boarded a ferry? Did you board as a ...

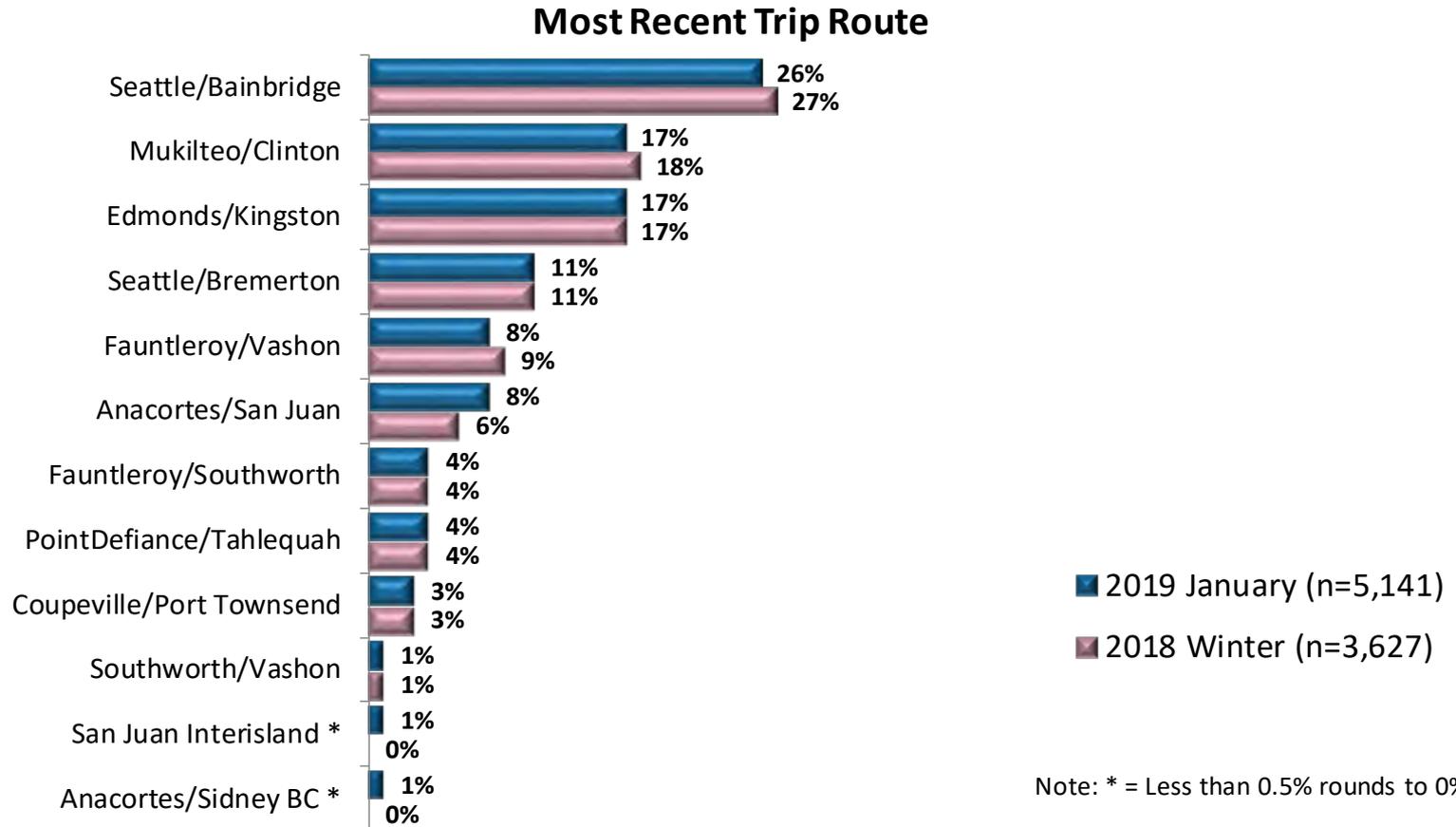


# Most Recent Trip

# Most Recent Trip - Route



The most recent trip was weighted by actual WSF ridership data. Overall there is very little difference in actual ridership for all of 2018 verses just the 2018 winter period.



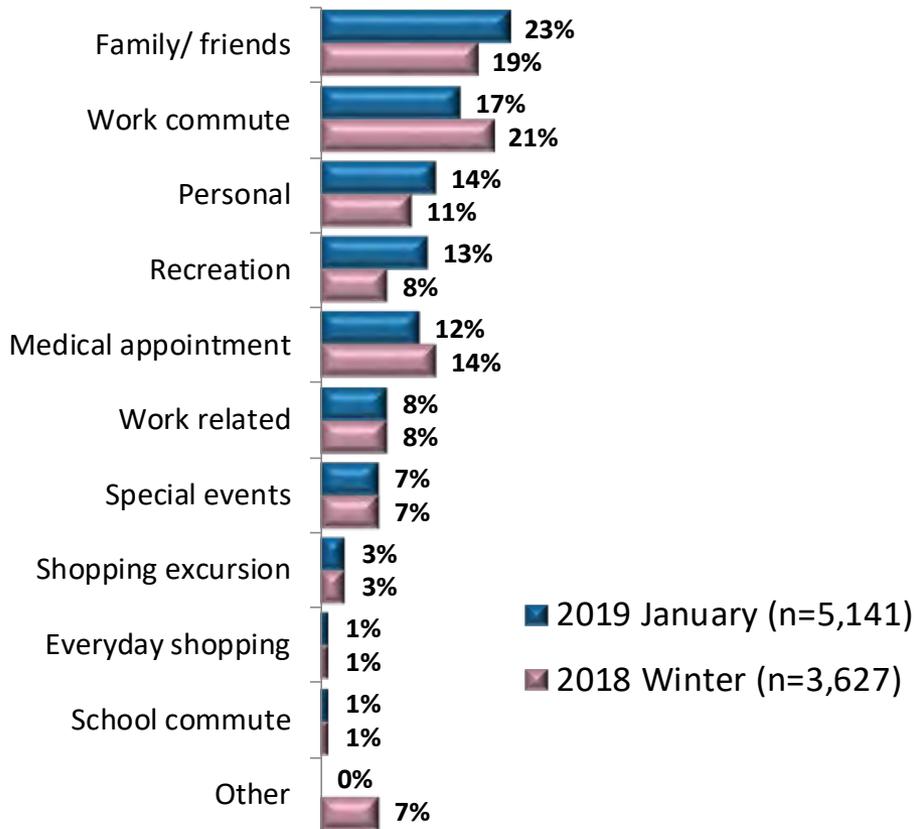
Q10. Now focusing in on your most recent ferry trip, what was the last route that you rode? (Question used in weighting data to reflect actual traffic count by route during winter period)

# Most Recent Trip – Purpose & Ticket Used

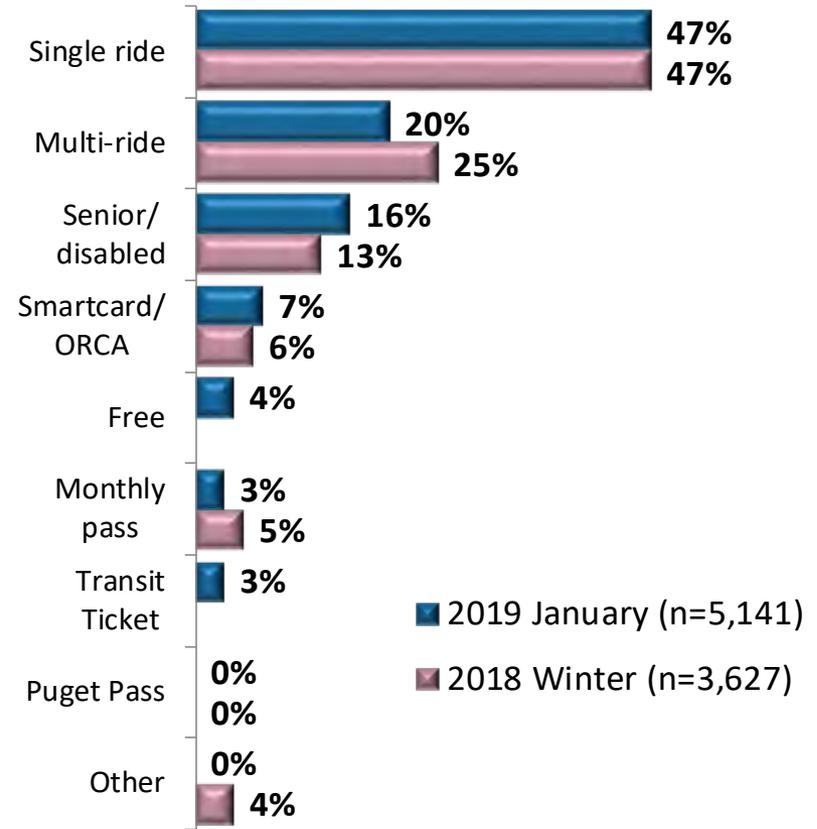


For the most part, the trip purpose in January 2019 and Winter 2018 are the same. The most notable difference is more travel to see family / friends or recreation in January 2019 than Winter 2018. There was less use of multi-ride tickets and more use of senior / disabled tickets in January 2019 than Winter 2018.

## Most Recent Trip Purpose



## Most Recent Trip Ticket Type



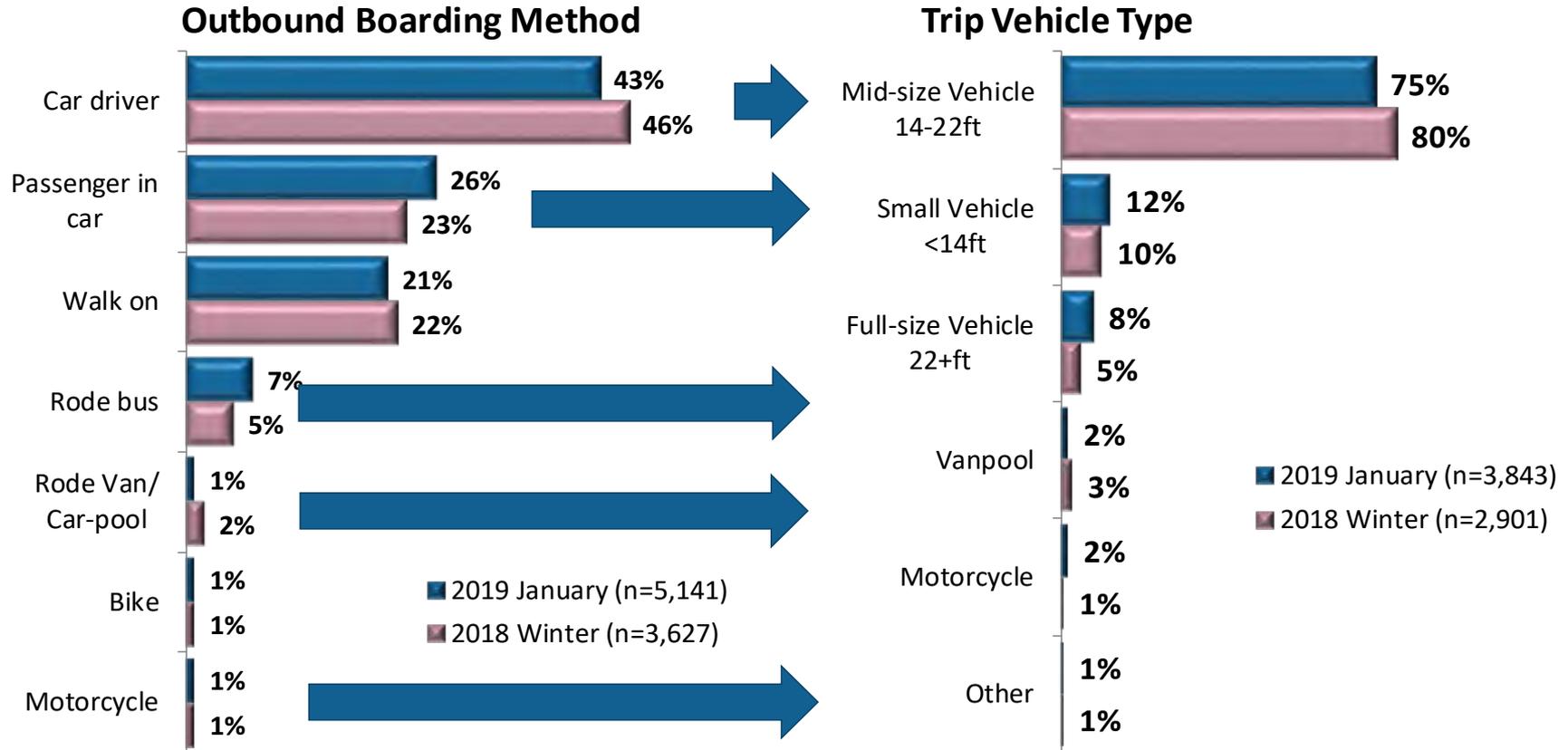
Q11 Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, which of the following was the PRIMARY PURPOSE for that specific trip?  
 Q14 Finally, thinking about your LAST FERRY RIDE ONLY on the {most recent} route, on what kind of ticket were you traveling?

# Most Recent Trip – Boarding Method/Vehicle Type



Vehicle ridership onto WSF ferries is comparable between January 2019 and Winter 2018 with only slightly less mid-size vehicles.

## Most Recent Trip



Q12 Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, how did you board the ferry for your outbound and returning trips?  
 Q13 Thinking about your LAST FERRY RIDE ONLY on the {most recent} route, which of the following best describes the vehicle you drove on the ferry?

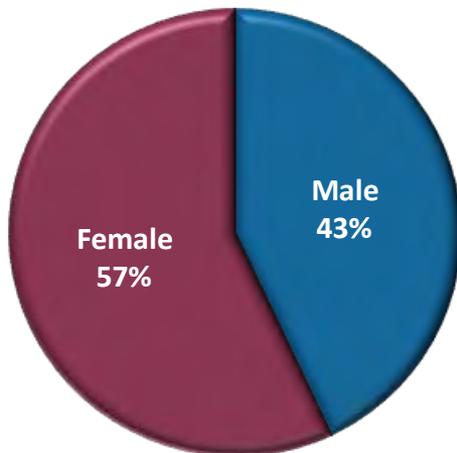


# Appendix

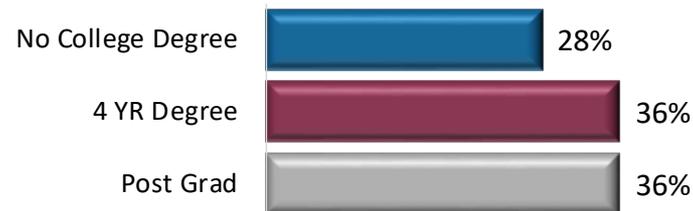
# Sample Makeup – Demographics



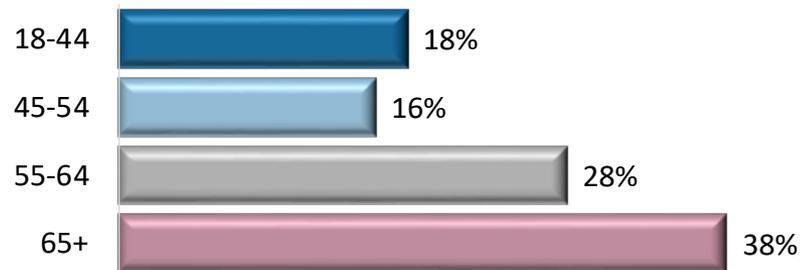
## Gender



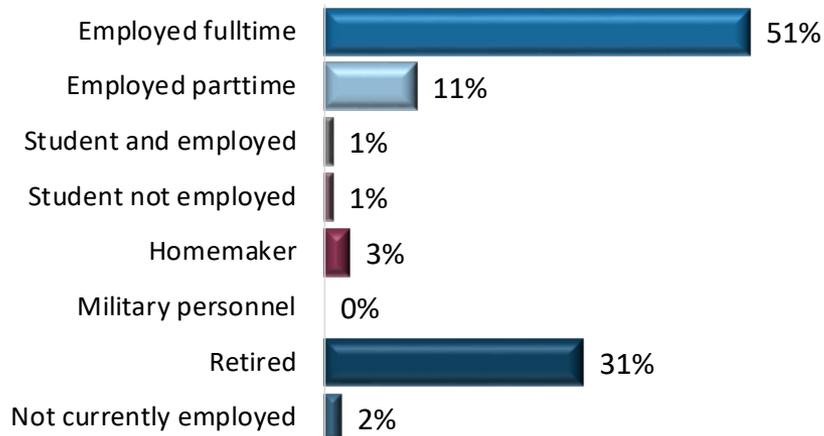
## Education



## Age



## Employment



## Ethnicity



# Sample Makeup - Weighting Methodology



In order to make the survey results proportionate to ferry ridership as a whole, it was necessary to weight the data by route based on their last trip taken to match WSF's 2018 actual traffic numbers. The weighting scheme used is displayed below.

	Veh. 0-14' Full	Veh. 0-14' Multi	Veh. 14-22' Full	Veh. 14-22' Multi	Over Size 22-50'	Over Size 50+'	Veh Other Disc	Veh Psngr Full	Veh Psngr Multi	Veh Psngr Other Disc	Foot Full	Foot Multi	Foot Other Disc	Foot Transt Pass
Sea/Brem	0.90	0.84	2.75	1.25	0.04	0.00	1.07	2.67	2.02	1.63	3.43	0.77	0.71	30.37
Sea/Bain	0.70	0.47	2.64	1.33	0.14	0.00	0.91	4.43	1.92	2.60	3.74	0.82	0.45	33.66
PD/Tah	0.33	0.58	3.82	1.33	0.26	0.79	1.52	23.22	1.54	8.15	3.58	1.19	5.03	0.00
Edm/King	0.39	0.50	2.80	1.43	0.30	2.08	1.31	2.46	1.13	3.13	2.49	1.20	1.09	0.00
Fau/Vashon	0.43	0.30	6.04	0.92	0.11	1.11	0.52	4.54	0.55	2.52	1.08	0.57	0.33	12.66
Fau/Sworth	0.47	1.14	1.72	1.01	0.03	0.00	0.95	3.15	0.54	1.05	2.79	0.54	0.31	0.00
Sworth/Vas	0.22	0.89	2.01	2.01	0.40	0.80	0.80	0.21	0.18	0.36	8.29	2.34	0.72	0.00
Coup/Pt.T	0.10	0.36	0.80	2.72	0.14	2.05	0.49	1.44	1.01	3.07	0.87	0.38	0.84	0.00
Muk/Clin	0.40	0.30	2.20	1.10	0.12	0.89	0.88	4.03	0.56	2.91	0.42	0.07	0.15	6.12
Ana/SJI	0.07	0.05	0.49	0.19	0.06	0.22	0.20	1.37	0.07	1.17	0.59	0.23	0.42	12.29
SJ Interisland	0.22	0.30	0.80	0.75	0.47	1.00	0.34	0.05	0.07	0.01	0.00	0.02	0.28	0.00
Ana/B.C.	0.23	1.15	0.25	1.15	0.38	11.51	0.58	1.06	0.00	0.93	0.68	0.00	2.98	0.00

# Questionnaire



## F43 - 2019 WSF POLICY STUDY FINAL v12 (Using FROG Panel)

(INTRO SCREEN)



### [GENERAL QUESTIONS]

Q1 Of these four general areas, in your opinion, which one issue or project should WSF focus on to improve its service? (Check one)

- 1 Expand service/schedules for current routes
- 2 Improve terminal facilities
- 3 Build new ferries
- 4 Restructure fares
- 5 -- Don't know
- 6 -- All of them
- 7 -- I DO NOT WANT/HAVE TIME TO DO THIS POLICY SURVEY (SKIP TO 26)
- 8 -- Other areas WSF should focus on to improve its service (Please specify here: \_\_\_\_\_)

(List will be in random order)

Q2 Please rank the following amenities from most (Top Priority For You) to least (Do Not Care About It At All) desired by you (or you can rank it anywhere in-between)

Top Priority For Me	High Priority	Upper Middle Priority	Lower Middle Priority	Lowest Priority	Do not care about it at all
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					(WSF added)
11					(FAC added)
12					(FAC added)
13					(FAC added)

Q3 How concerned are you about WSF's carbon footprint and WSF's general impact on the environment? Would you say you are ... (select one)

- 1 Very concerned
- 2 Somewhat concerned
- 3 Slightly concerned
- 4 Not at all concerned
- 5 Don't know the impact; (Would like more information before I can make my decision) (FAC added)

### [FUNDING QUESTIONS] (added by WSTC)

Q4 Current ferry fares fund about 70-75% of ferry operations and maintenance of vessels and terminals but do not provide for long-term capital improvements or replacement (these could include non-operational items like new vessels, terminals, parking structure, etc.).

Which of the following increases in funding sources, if any, would you recommend be explored and possibly considered to fund the long-term capital needs of the ferry system? (Please check as many as you would like to see used)

- 1 Increase the statewide sales tax
- 2 Increase the statewide gas tax
- 3 Establish a new statewide tax dedicated to funding ferry capital needs
- 4 Increase vehicle registration fees
- 5 Establish a new tax in Western Washington ferry served communities
- 1 -- None of the above
- 2 -- I don't think WSF has a funding problem
- 3 -- Not sure
- 4 -- Other funding source WSF should explore (please specify funding source here)

Q5 Currently a surcharge of \$0.25 per ticket is dedicated to help fund new ferries.

How much more would you be willing to pay, provided this funding continues to be dedicated to new ferries?

- 1 \$0.00 (I want the \$0.25 removed)
- 2 \$0.25/ticket (Keep the current \$0.25/ticket - no increase)
- 3 \$0.50/ticket
- 4 \$0.75/ticket
- 5 \$1.00/ticket
- 6 \$1.25/ticket
- 7 \$1.50/ticket
- 8 Other amount (please specific amount here)

D6a At \$0.25 per ticket the surcharge will raises about \$4 million per year. The cost of a new 144-car ferry costs about \$150 million.

Knowing this, would you support the surcharge of \$0.25 per ticket being increased if it continues to be dedicated to new ferries?

- 1 Yes --- Support an increase
- 2 Maybe - It depends on the amount
- 3 No --- Do not support an increase (SKIP TO Q7)

# Questionnaire



Q6b Up to what amount could you support the surcharge being increased to?

- 1 \$0.50/ticket
- 2 \$0.75/ticket
- 3 \$1.00/ticket
- 4 \$1.25/ticket
- 5 \$1.50/ticket
- 6 Other amount (please specify amount here)

## [USAGE AND LAST ROUTE QUESTIONS (USED FOR WEIGHTING)]

Q7 All things considered, how satisfied are you with the service provided by Washington State Ferries?

- 1 Extremely dissatisfied
- 2 Somewhat dissatisfied
- 3 Neither satisfied nor dissatisfied
- 4 Somewhat satisfied
- 5 Extremely satisfied
- 6 -- (Did not ride WSF during the last 12 months) (SKIP TO Q26)

Q8 To get an idea of how people are using the ferry system:

Which of the following route(s) have you ridden for ANY PURPOSE in the last 12 months?

- |                            |                               |   |
|----------------------------|-------------------------------|---|
| 1 Seattle/Bainbridge       | 6 Fauntleroy/Southworth       | 11 San Juan Interisland                             |
| 2 Seattle/Bremerton        | 7 Southworth/Vashon           | 12 Anacortes/Sidney B.C.                            |
| 3 Point Defiance/Tahlequah | 8 Coupeville/Pt. Townsend     | 13 Don't Recall Route                               |
| 4 Edmonds/Kingston         | 9 Mukilteo/Clinton            | 14 Did not ride WSF in last 12 months (SKIP TO Q26) |
| 5 Fauntleroy/Vashon        | 10 Anacortes/San Juan Islands |   |

Q9 In the last 12 months, which of the following ways have you boarded a ferry? Did you board as a ...

- 1 Vehicle driver
- 2 Passenger in a vehicle
- 3 Rider on a Motorcycle
- 4 Rider on a Registered Van/Car Pool
- 5 Walk-on
- 6 Biked-on
- 7 Rode on a bus/transit (including shuttle vehicles)

Q10 Please focus on your most recent ferry trip;

What was the last route that you rode for any purpose?

- |                            |                           |                               |
|----------------------------|---------------------------|-------------------------------|
| 1 Seattle/Bainbridge       | 5 Fauntleroy/Vashon       | 9 Mukilteo/Clinton            |
| 2 Seattle/Bremerton        | 6 Fauntleroy/Southworth   | 10 Anacortes/San Juan Islands |
| 3 Point Defiance/Tahlequah | 7 Southworth/Vashon       | 11 San Juan Interisland       |
| 4 Edmonds/Kingston         | 8 Coupeville/Pt. Townsend | 12 Anacortes/Sidney B.C.      |

Q11 Thinking about your LAST FERRY RIDE ONLY on the \${custom1} route...

Which of the following was the PRIMARY PURPOSE for that specific trip?

- |                                  |   |
|----------------------------------|---|
| 1 Commute to/from work           | 7 Shopping excursion                    |
| 2 Commute to/from school         | 8 Tourism/recreation                    |
| 3 Work related activity/business | 9 Travel to/from special event          |
| 4 Personal business/activity     | 10 Travel to/from to see family/friends |
| 5 Medical appointment            | 11 Other - please specify               |
| 6 Everyday shopping              |   |

Q12 Thinking about your LAST FERRY RIDE ONLY on the \${custom1} route;

How did you board that ferry?

*(If you boarded differently for the out-bound and returning segments of your ferry trips - please mark the out-bound ferry trip only)*  
*(If you drove around on the out-bound of your trip and returned on the ferry - please mark the returned ferry trip only)*

- 1 Vehicle driver
- 2 Passenger in a vehicle
- 3 Rode on - Motorcycle (Skip to Q14)
- 4 Rode on - Registered van/car pool (including Uber/Lyft) (Skip to Q14)
- 5 Walk-on (Skip to Q14)
- 6 Biked on (Skip to Q14)
- 7 Rode on in bus/transit (including shuttle vehicles) (Skip to Q14)
- 8 Other (Skip to Q14)

Q13 Thinking about your LAST FERRY RIDE ONLY on the \${custom1} route; ...

Which of the following best describes the vehicle you drove on the ferry?

- 1 Small (under 14 feet) auto/ SUV/ pick-up (i.e., Kia Soul, Volvo C30, Toyota Yaris, VW Golf, etc.)
- 2 Regular (14 to 22 feet) auto/SUV/pick-up (i.e., Toyota Corolla, Nissan Altima, Ford Taurus, Hyundai Santa Fe, etc.)
- 3 Full-size (over 22 feet) auto/SUV/pick-up (i.e., Extended cab pickups, etc.)
- 4 Truck (commercial, panel, tractor / trailer)
- 5 RV or auto/pick-up and trailer/boat (under 30 feet)
- 6 RV or auto/pick-up and trailer/boat (30' and over)
- 7 Vanpool
- 8 Motorcycle
- 9 Other

Q14 Finally, thinking about your LAST FERRY RIDE ONLY on the \${custom1} route...

On what kind of ticket were you travelling?

- 1 Single-ride ticket (includes Wave2Go Single-ride ticket) (WSTC added)
- 2 Multi-ride frequent user ticket (available to all passengers & non-oversized vehicles includes Wave2Go Multi-ride ticket)
- 3 Monthly pass (not available to vehicle drivers)
- 4 Senior/disabled Convenience Card/discount
- 5 SmartCard/ORCA (One Regional Card for All)
- 6 Puget Pass
- 7 Free (No ticket needed this direction; WSF employee pass; etc.) (WSTC added)
- 8 Part of another (bus/transit/shuttle/uber/etc.) ticket I paid (WSTC added)
- 9 Other - please specify

# Questionnaire



Q15 Which of these, if any, would encourage you to walk on more rather than drive on (as driver or passenger)? (Check all that apply)

- 1 Lower walk-on fares
- 2 Higher drive on fares
- 3 Better transit connections to/from ferry terminals
- 4 Lower parking costs at terminal(s)
- 5 Availability of car-share/ rental services at the terminal
- 6 -- None of the above
- 7 -- Nothing – I will ALWAYS drive on
- 8 -- Nothing – I ALREADY walk on MOST of the time
- 9 -- Other way to encourage me (Please specify way here) \_\_\_\_\_

Q16 Would you be more likely to walk onto the ferry if ... **the general pick-up and drop-off areas at terminals were improved?** Would you say you would be (select one)

- 1 Not at all more likely (wouldn't make a difference for me)
- 2 Slightly more likely
- 3 Would be more likely
- 4 Considerably more likely

Q17 Would you be more likely to walk onto the ferry if ... **there was ride-sharing services (like Uber/Lyft/taxis) consistently at your destination terminal?** Would you say you would be (select one)

- 1 Not at all more likely (wouldn't make a difference for me)
- 2 Slightly more likely
- 3 Would be more likely
- 4 Considerably more likely

Q18 Would you be more likely to walk onto the ferry if ... **there was real time parking availability information?** Would you say you would be (select one)

- 1 Not at all more likely (wouldn't make a difference for me)
- 2 Slightly more likely
- 3 Would be more likely
- 4 Considerably more likely

Q19 Over the past few years, passenger fares have been going up at a lower rate than vehicle fares.

Has this encouraged you, or not, to travel more as a foot passenger or to carpool?

- 1 Yes - Has encouraged me to travel (or continue to travel) more as a foot passenger or to carpool
- 2 No - Has not encouraged me to travel more as a foot passenger or to carpool
- 3 Was not aware of the percentage differences in fare increases (thought they went up by the same amount)  
(FAC added)

Q20 Do you or could you **make either a train and/or bus connection** as part of your trip on the ferry?

- 1 **Already do** train/bus today as part of my ferry travel
- 2 **Could/might do** train/bus in the future as part of my ferry travel
- 3 I would **never do** train/bus as part of my ferry travel (But it is available) (SKIP TO Q22)
- 4 Can't do **train/bus as they are not available** to where I need to go (SKIP TO Q22)

Q21 Does the current **ferry schedule** (departures/arrivals) on the route you take most often **adequately match up** with your needed (or potentially needed) **train or bus connection?**

- 1 Yes
- 2 No
- 3 Not sure (Don't know train/bus schedule information)

#### [PASSENGER ONLY QUESTIONS]

Q22 Would you like to see **passenger only ferry service** expanded throughout the Puget Sound (including the in San Juan)?

- 1 Not really
- 2 Yes – **System-wide**
- 3 Yes – **Central Puget Sound Only**
- 4 Yes – **San Juan Only**
- 5 Maybe (Depends on other factors) such as ... (Please specify other factors here) \_\_\_\_\_

Q23 If a fleet of passenger only vessels were added to the routes that you typically use, who would you **most want to operate them?**

- 1 WSF
- 2 County Governments/transit agencies
- 3 Private companies
- 4 Any of the above
- 5 None of the above (I don't know who should)
- 6 None of the above – I think   (Please specify who you think should)

#### [OPEN RESPONSE QUESTIONS]

Q24 What additional **suggestion or changes in WSF policy** would you like to offer WSF and state decision makers that you think would **improve or strengthen the quality of service** WSF provides?

- 1 Nothing, the policies and quality of WSF services are good
- 2 I would like the following **policy changes or suggestions** to improve WSF quality of service

Here are my policy changes and/or suggestions:

# Questionnaire



Q25 Do you have any **additional thoughts regarding the ferry system** or **Washington state's transportation system** you would like to share?

- 1 No additional feedback
- 2 Yes, I have additional feedback, give me a comment box to add them to:

Here is my additional feedback

Q26 Before you hit the "Save Completed Survey" button below:

When would you guess your **next ferry trip** will happen?

1. Today
2. Sometime this week
3. Sometime this month
4. Sometime this year
5. Never
6. Don't know

END