



Ferry Riders Opinion Group (FROG) Survey Panel
Data on Reservation No-Show Fee &
Capital Surcharge
June 18, 2019

Executive Summary



CAPITAL SURCHARGE:

- ▶ Without any further information, rider's 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.



MULTIPLE RESERVATIONS:

- ▶ 3,270 reservation riders surveyed made an average of 6.8 reservations in the last year (6.9 in 2016).
 - Full time San Juan Island residents average more yearly reservations (21.5) than part time (16.4) or visitors (5.7).
- ▶ Almost half (47%) of the 2,578 riders who have used the WSF reservation system more than once have made multiple reservations for themselves for the same trip, doing so an average of once a month.
 - Full time (1.5 per month) and part time (1.4/month) residents' book multiple reservations more per month than visitors (.9/month).

NO-SHOW FEES:

- ▶ Just over half (55%) of the 3,270 riders said the no-show fees should be raised from the current \$10 to \$17 to cut down on multiple reservations.
 - Visitors to San Juan Islands (57%) are more likely to say increase the no-show fees than either part time residents (54%) or full time San Juan Islands residents (39%).



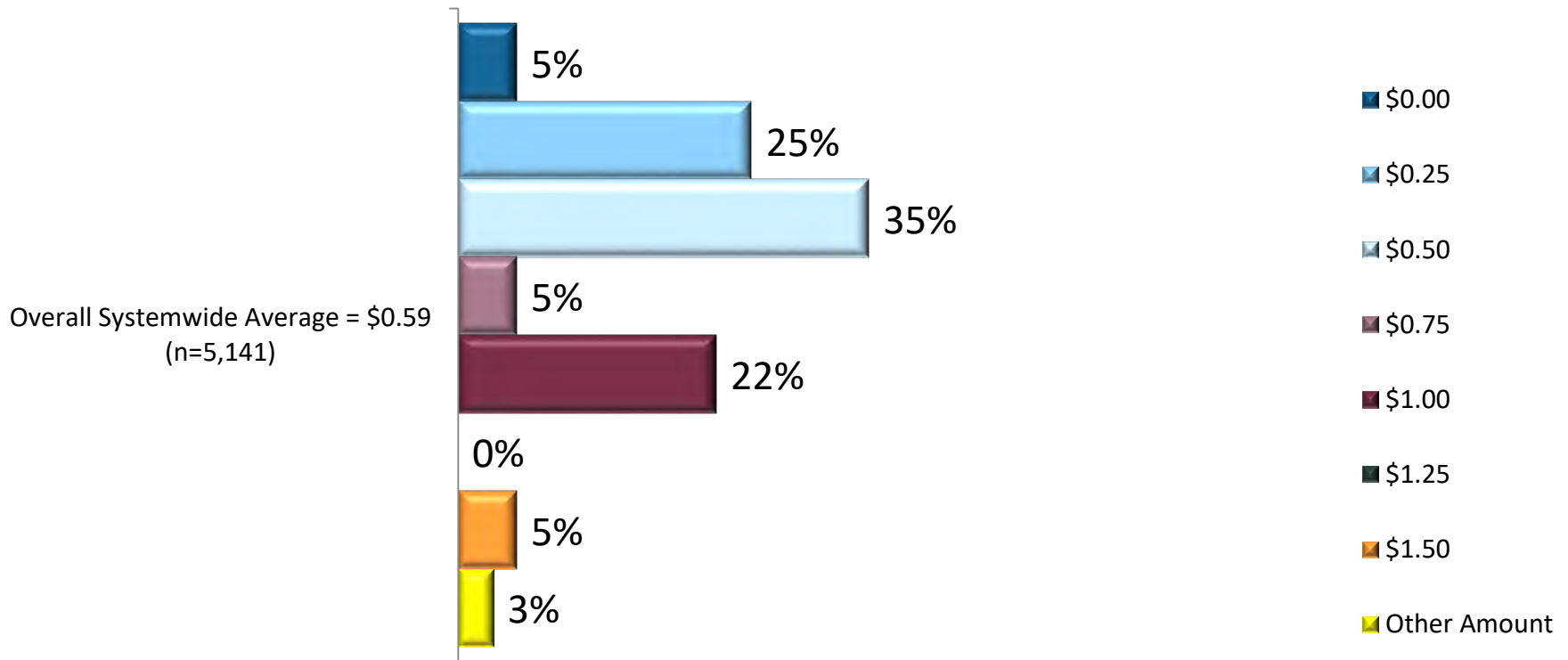
Attitudes Towards Capital Surcharge From 2019 Policy Study

Attitudes Towards Ferry 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



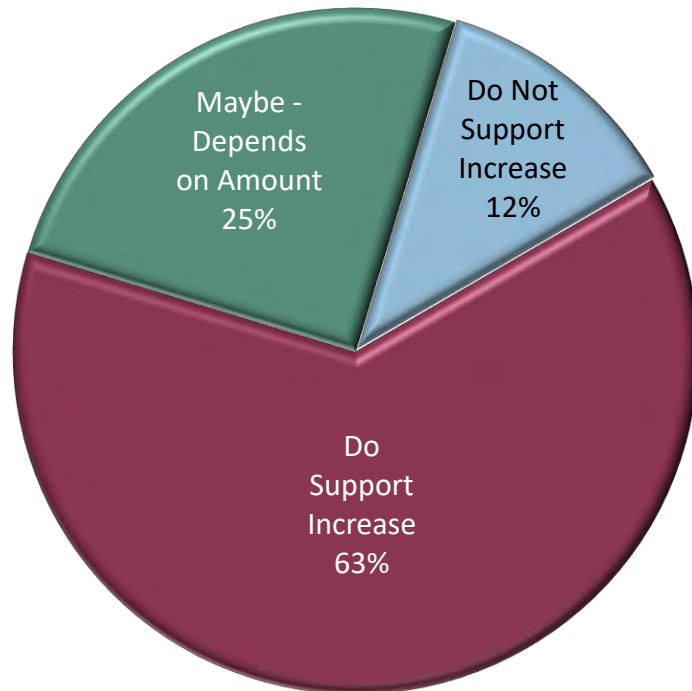
Q5 Currently a surcharge of \$0.25 per ticket is dedicated to help fund new ferries. How much more would you be willing to pay, provided this funding continues to be dedicated to new ferries?

Attitudes Towards Ferry 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.

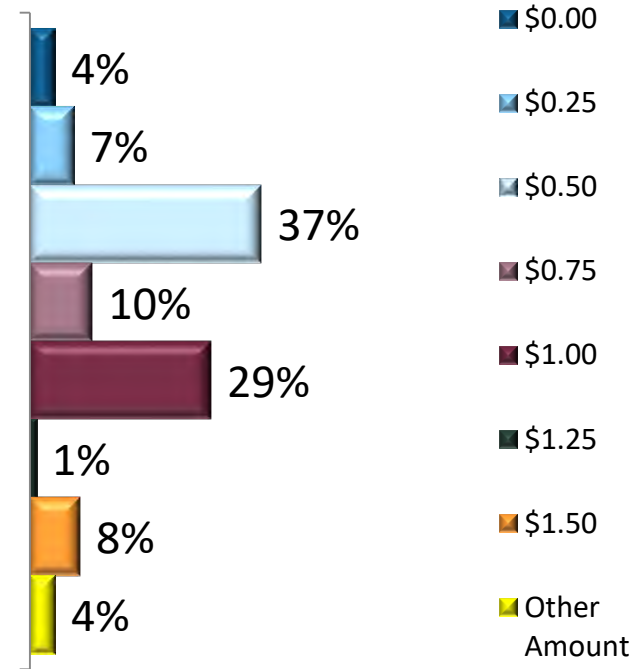
**Level of Support for Surcharge
(n=5,141)**



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?

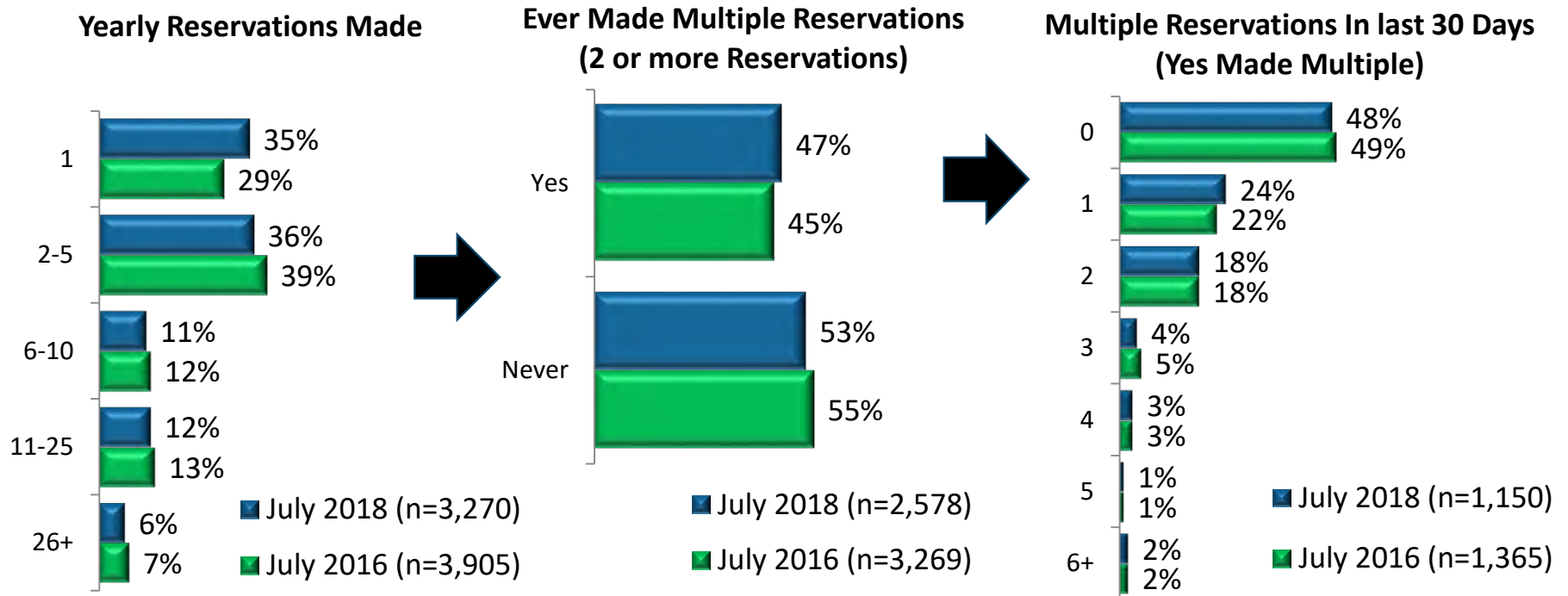


Attitudes Towards No-Show Fee From 2018 Reservation Study

Multiple Reservations



The 3,270 riders surveyed made an average of 6.8 reservations per year, similar to 2016 (6.9). The 2,578 riders who have used the WSF reservation system more than once were asked if they ever made multiple reservations for themselves for the same trip, and similar to 2016, almost half in 2018 (47%) said they had. Those who have ever made multiple reservations for the same trip were asked how many times they did that in the last 30 days. Again, similar to 2016, 52% in 2018 reported they have done so in the last 30 days. The average number of multiple bookings for the same trip is 1.0 per month, same as in 2016 for all those that have done so.



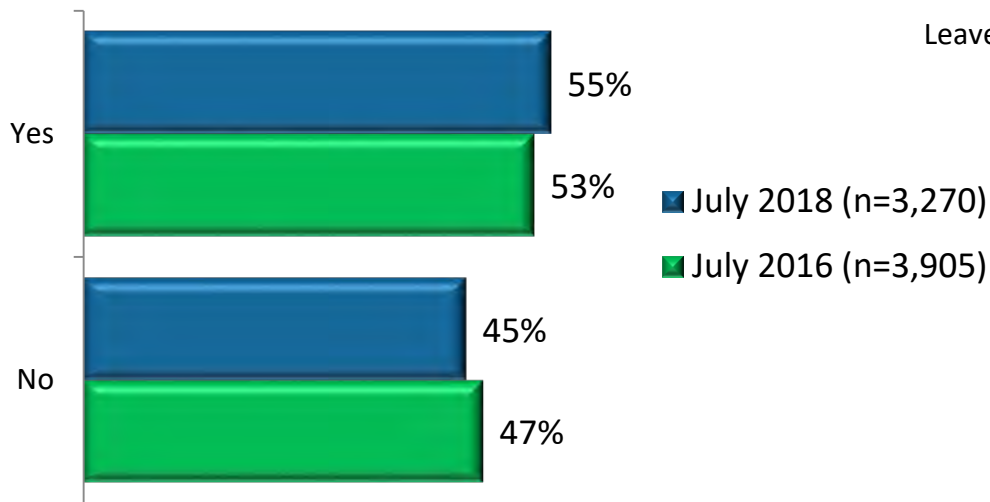
Q6d Approximately how many different reservations have you made in the last year? Q6d1 Have you ever made multiple reservations for yourself for the same trip (multiple sailings)? Q6e During the last 30 days, how many, if any, multiple reservations did you make for yourself for the same trip (multiple sailings)?

No-Show Fees & Multiple Reservations.

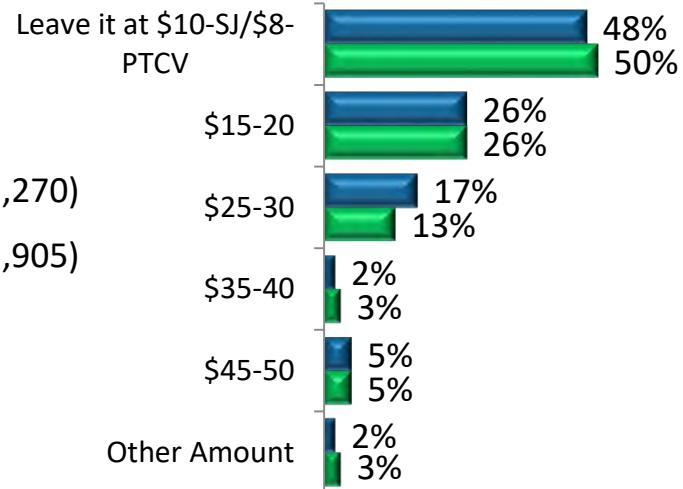


The 3,270 riders who have used the WSF reservation system were given a short background description on the impact of making multiple reservations for the same trip and asked if the no-show fees should be raised. Similar to 2016, 55% in 2018 said the no-show fees should be raised to \$24 compared to \$23 in 2016 (on average). Visitors to San Juan Islands (57%) are more likely to say increase the no-show fees than either part time San Juan Islands residents (54%) or full time San Juan Islands residents (39%). Those living on Lopez Island (46%) are more likely to want the no-show fees increased than Orcas (39%) or San Juan (36%) Island residents. The average increase based on all 3,270 respondents for the no-show fee is \$17 (in both 2018 and 2016).

Increase No-Show Fees



Suggested Amount



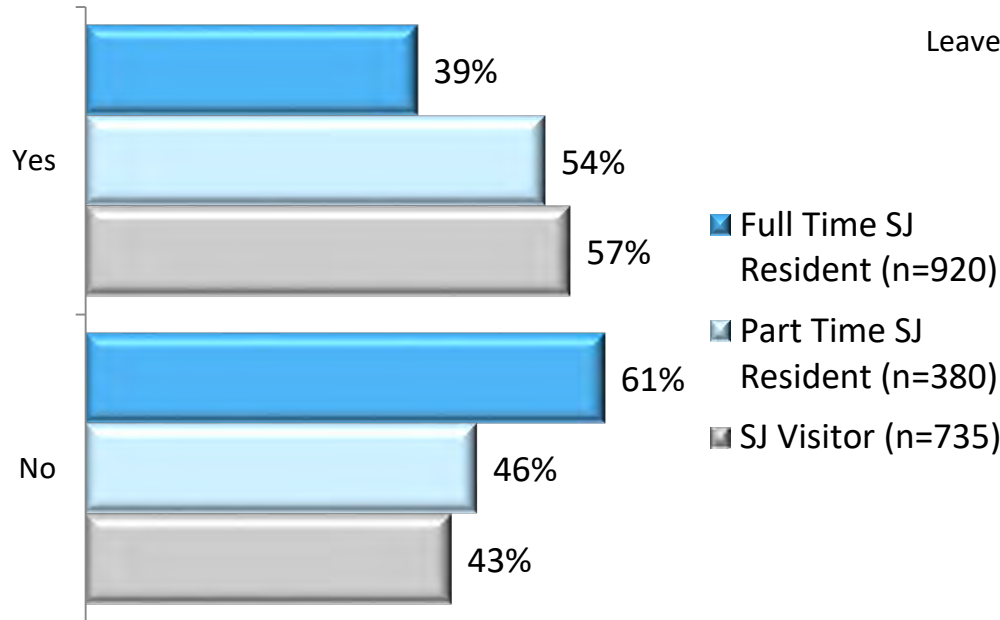
Q6n Background: The current no-show fees that most people pay for standard size vehicles is \$10 per no-show in San Juan (\$8 for Port Townsend/Coupeville). Some riders are booking multiple reservations on multiple sailings for their single trip which causes more boats to show as “full” on the reservation site. It also means boats may leave with space available given the no-shows by those riders. Question: Should the no-show fees be increased to cut down on the multiple reservation bookings on multiple sailings for a single trip? Q6o The current no-show fee for vehicles is \$10 in San Juan (\$8 for Port Townsend/Coupeville) for a standard size vehicle, what would you suggest the fee be increased to in order to cut down on multiple reservation bookings on multiple sailings for a single trip?

No-Show Fees & Multiple Reservations.

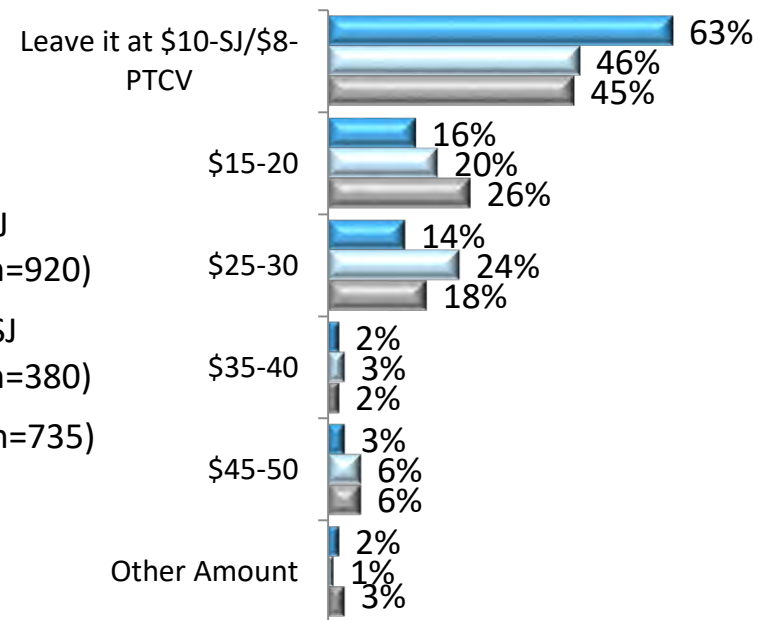


When broken out by residency the 2018 data suggest it is a part time (54%) / visitor (57%) desire more so than full time (39%) SJ resident desire. Even the amount to raise the no-show fee to is slightly lower for full time residents (\$15.60) compared to part time (\$18.90) and visitors (\$18.20).

Increase No-Show Fees



Suggested Amount



Q6n Background: The current no-show fees that most people pay for standard size vehicles is \$10 per no-show in San Juan (\$8 for Port Townsend/Coupeville). Some riders are booking multiple reservations on multiple sailings for their single trip which causes more boats to show as "full" on the reservation site. It also means boats may leave with space available given the no-shows by those riders. Question: Should the no-show fees be increased to cut down on the multiple reservation bookings on multiple sailings for a single trip? Q6o The current no-show fee for vehicles is \$10 in San Juan (\$8 for Port Townsend/Coupeville) for a standard size vehicle, what would you suggest the fee be increased to in order to cut down on multiple reservation bookings on multiple sailings for a single trip?



Appendix

2019 Policy Study 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:

Sample	Graph Name	Definition
• 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

2018 Reservation Study Methodology



- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG) survey panel.
- ▶ A total of 4,988 surveys were completed in July 2018 (July 9 – August 3, 2018).
- ▶ 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:

Sample	Graph Name	Definition
4,988	Total	Total number of completed surveys system-wide
1,610	SJ Riders	Riders that used the San Juan / Inter-Island routes last
64	BC Riders	Riders that used the Sidney BC route last
278	PT Riders	Riders that used the Port Townsend – Coupeville route last
955	Full Time SJ	Full time SJ Island residents that used SJ routes last
468	SJ Island	Permanent residents of San Juan Island
348	Orcas Island	Permanent residents of Orcas Island
181	Lopez	Permanent residents of Lopez Island
418	Dissatisfied Users	Reservation users that are dissatisfied with the system
2,611	Satisfied Users	Reservation users that are satisfied with the system
1,952	Res Routes	Riders who last used one of the three reservation routes
3,035	Non-Res Routes	Riders who last used a non-reservation route