



Washington State Ferries 2016 Customer Research

Summary of Findings Report

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Prepared for:



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Executive Summary

Executive Summary

General Ferry Rider Travel Habits

- ❖ For summer travel, the average number of trips per month has increased slightly on most routes since 2014, but the picture is not the same for winter travel – the average number of trips per month has decreased since 2014.
- ❖ The biggest increase in average trips per month was in the summer on the Point Defiance/Tahlequah route (+1.8 trips). The biggest drops in average trips per month was in the winter on the Mukilteo/Clinton (-4.7 trips) and Fauntleroy/Vashon (-4.1 trips) routes.
- ❖ Seattle/Bainbridge and Edmonds/Kingston are the most used routes in both summer and winter.
- ❖ A majority of riders (75% Summer / 67% Winter) are still driving on (as either driver or passenger) to the ferries, and a majority are also using ferries primarily for commuting (51% Summer / 61% Winter).
- ❖ Seattle/Bremerton and Seattle/Bainbridge are the only routes with more walk on riders than drivers in the summer.
- ❖ In both summer and winter, most riders continue to use Multi (31% Summer / 33% Winter) or Single Ride (41% Summer / 29% Winter) tickets.

Recreational Ferry Rider Travel Habits

- ❖ Almost all (97%) summer riders have used the ferries to take one or more recreational trips during the year.
- ❖ Seattle/Bainbridge (25%), Edmonds/Kingston (17%), and Mukilteo/Clinton (15%) are the most used routes for riders' most recent recreational trip.
- ❖ As in 2014, the most commonly used ticket type for recreational riders is a single ride ticket (41%), with multi-ride tickets the second most commonly used ticket (31%). Compared to 2014, the use of multi-ride tickets is down (-6%), and the use of single ride tickets is slight up (+1%).
- ❖ By far, the most common purpose of riders' most recent recreational ferry trip is visiting family and friends (41%).

- ❖ A plurality of riders from the FROG panel (typically local, more regular riders) say the cost of riding the ferry is over 25% of their recreational trip's total cost. By contrast, a majority of riders from the on-board survey (typically non-local, less frequent riders) say that the cost of riding the ferry is under 10% of their total recreational trip cost.
- ❖ Most recreational trips (83% Panel; 71% Onboard) are round trips on the same ferry route, with only a few riders saying they return on a different route or only go one direction.
- ❖ The average length of recreational trips has remained two days, the same average as 2014.

Ridership Trends

- ❖ Unlike previous years, only about one-in-five (19%) of Puget Sound infrequent riders say their WSF travel has decreased over the last year. One-third (33%) non-Puget Sound residents say their WSF travel has decreased.
- ❖ Almost all summer riders (88% FROG Panel; 81% Onboard) say they are likely to use WSF again for a recreational or social trip.

Satisfaction with WSF Performance

- ❖ The combined overall satisfaction with WSF among winter, summer, and on-board survey respondents is similar to 2014 (2016: 75% Satisfied / 16% Dissatisfied; 2014: 74% / 18%). The percentage of summer riders (FROG Panel) saying they are dissatisfied has decreased slightly from 30% in 2014 to 26% in 2016. FROG Panel – who tend to be regular riders – are about six times more dissatisfied (26% Dissatisfied vs. 4% Dissatisfied) than onboard survey respondents – who tend to be non-local, occasional riders. Winter riders (FROG Panel) are largely satisfied (74% Satisfied/ 18% Dissatisfied).
- ❖ The combined perception of WSF's overall value among winter, summer, and on-board survey respondents is similar to 2014 (2016: 75% Good Value / 12% Poor Value; 2014: 73% / 14%). The perceived overall value of WSF, among summer riders (FROG Panel) has increased slightly compared to 2014 (73% vs. 67% rated good value). On board survey respondents, overwhelmingly (91%) see WSF as a good value.
- ❖ Of the 24 WSF attributes tested in the winter FROG panel survey, only two - "adequate parking near terminals" and "terminal bathrooms clean" – had overall dissatisfaction levels above 20%. Dissatisfaction with bathroom cleanliness is highest for the Seattle terminal.

- ❖ Overall satisfaction is highest for "vessel crew is friendly" (86%), "vessel crew is helpful" (86%), "toll booth staff is friendly" (86%), "buying tickets is easy and quick" (81%), and "passenger seating areas are clean" (81%) in the winter period survey.
- ❖ About three quarters of winter (74%) and summer (82%) riders have used the WSF website are satisfied and fewer than seven percent are dissatisfied with the experience.
- ❖ Very few riders (12% or less) have contacted WSF customer service by phone and seven-in-ten or more of those who have are satisfied with their experience. Dissatisfaction was somewhat higher in summer than the winter (18% Dissatisfied vs. 13% Dissatisfied).
- ❖ Only about a quarter of winter riders have interacted with WSF terminal staff, and a majority (66%) are satisfied with their experience - 20% say they were dissatisfied.

WSF Fare & Funding Policy Issues

- ❖ Statewide two thirds (67%) of the general public (VOWS) say that daily WSF operations should be funded using a mix of fares and taxes. Puget Sound residents prefer a mix of fares and taxes over making riders pay the full cost by a 72% (mix of fares/taxes) to 21% (riders only) margin. Residents outside Puget Sound are much more divided, with 59% saying a mix of fares and taxes and 39% saying riders only.
- ❖ Non-Puget Sound residents are divided roughly in thirds when it comes to who should pay for capital investments (Everyone – 30%, Puget Sound (PS) Residents – 36%, Ferry Riders – 27%) but lean towards PS residents paying. Westside PS residents are significantly more likely to say "everybody" should pay for capital improvements (57%) compared to Eastside PS (50%) and non-Puget Sound Basin (30%) residents.
- ❖ Increasing the gas tax (29%), establishing a new state tax (25%), increasing vehicle registration fees (25%) are the top suggestions from summer riders for funding WSF capital needs.
- ❖ A majority of summer riders (58%) believe that some ferry terminals require enlargement or redesign.
- ❖ Most residents statewide believe that WSF is important to the general Puget Sound economy and growth and is important to encouraging tourism in the Puget Sound. Even outside Puget Sound, a strong majority think WSF is important to the Puget Sound economy (85%) and to encouraging tourism (88%).

General Public (VOWS) Ferry Usage & Attitudes towards WSF

- ❖ Over half (56%) of residents living in West Puget Sound use the ferries at least once a month and four-in-five (80%) use the ferries at least every 3 months. By contrast, just less than half (48%) of East Puget Sound residents use the ferries once a year or less and almost four-in-five (84%) of 2014 residents outside Puget Sound use the ferries less than once a year.
- ❖ Three-quarters (74%) of Puget Sound residents have used WSF in the last year, while over half (59%) of residents outside Puget Sound have NOT used WSF in the last year.
- ❖ Residents living on the Westside of Puget Sound use the ferries for a wide range of activities. Residents on the Eastside (47%) and residents outside of Puget Sound (54%) primarily use the ferries for recreational purposes.

Freight Shippers Usage & Attitudes Towards WSF

- ❖ Over half (52%) of freight customers use WSF at least weekly, compared to 47% in 2014.
- ❖ As in 2014, Edmonds/Kingston is the most frequently used freight route overall. Unlike 2014, the Mukilteo/Clinton is the single most used route in 2016.
- ❖ The freight companies surveyed averaged 15.6 trips per month. Companies whose freight trips are consistent year-round average 15 trips per month.
- ❖ Since 2014 there has been a dramatic decline in Peak trips by freight companies.
- ❖ By a 49% to 9% margin, freight shippers say the time trucks have to wait at terminals has a bigger impact on their travel behavior than fares.
- ❖ Just under half (46%) of freight shippers say wait times are at least a moderate (34%) or major (12%) issue or problem, which is up from 42% in 2014.
- ❖ Approximately eight in ten (83%) freight shippers say they are aware of the reservation system. The majority use the commercial reservation system always (70%) or often (11%). Only 3% never use the system. Of those customers who use the reservation system, most say they are satisfied.

- ❖ The majority of freight company decision makers say their frequency of ferry use for freight has not changed and a strong majority (88%) say that they consider WSF to be a good value.

General Public (VOWS) & Ferry Riders Opinion on Ferry Naming

- ❖ A majority of FROG panel respondents (55%) and a plurality of VOWS panel respondents (39%) chose the name Suquamish for the new Washington Ferry. After combining the two panels, a majority chose the same name (46%).

FROG Panel Opinion Regarding WSF Reservation System for San Juan, Anacortes, BC, and PT Townsend Routes

- ❖ A majority (55%) of FROG panel members have used or tried to use the WSF reservation system. A large majority (86%) of riders who used the system has no problems completing their reservation. Riders in the San Juan Islands (19%) had the highest concentration of issues during reservation scheduling.
- ❖ Overall, an average of 6.9 reservations per year per rider were made last year.
- ❖ Of the riders that experience a problem/issue while making a reservation, a majority (65%) used the WSF website. The top issue mentioned was “Website Difficulty/Usability” (33%).
- ❖ Among riders that tried to use the system, but never completed a reservation, a large majority (77%) used the WSF website. The top reason cited by respondents for not completing the reservation was because their desired boat for transportation was unavailable (42%).
- ❖ An overwhelming majority of riders are satisfied with the system (79%). Riders along the Anacortes – Sidney BC (84%) and the Port Townsend – Coupeville (85%) routes are more satisfied than San Juan riders (74%).
- ❖ Among those dissatisfied with the system, riders cite the “Program is Frustrating” (17%), “Unreserved Portion – Too Small” (17%), and “Reservations – Hard to Use” (16%) as the top items they are unhappy with. Making the reservation program functionality better (25%) is the most cited way the system could improve.
- ❖ Approximately 8-in-10 (78%) respondents said the current program is reasonable, up from 69% in 2015.
- ❖ The top reason riders believe the current program is unreasonable is the “Unreserved Space Allocation” (35%).

- ❖ A majority of respondents, say they have used, or will use, the Port Townsend – Coupeville (56%) and Anacortes – San Juan Islands (52%) routes.
- ❖ Among those who used the reservation system two or more times, 45% made multiple reservations. However, almost half (49%) had not done so within the last 30 days.
- ❖ A large majority (79%) of riders that use the reservation system are satisfied with the customer service at the terminal. Among the 9% that are dissatisfied, the Anacortes terminal is mentioned most (42%).
- ❖ Among riders who have used the reservation system along these routes, about one-third (36%) say making the toll booth in time is a large worry, while a majority (62%) say it is either a worry or large worry to them. However, only one-in-ten respondents (13%) have actually missed their scheduled sailing.
- ❖ Just over half (53%) of riders said the no-show fees should be raised to \$23 (on average). However, half (50%) of all respondents suggest the fee should remain where it is - the average amount for a no-show fee among all respondents to be raised to is \$17.

Study Background & Methodology

Study Background & Methodology

The Washington State Transportation Commission (WSTC) has been conducting surveys of ferry riders regarding Washington State Ferries since 2008. The initial 2008 surveys were done with paper questionnaires passed out on the boats. The commission found that many of the issues facing ferry operations were of a longitudinal nature (changes over time) and in 2010 created the Ferry Rider's Opinion Group (FROG) online panel. This online community allowed ferry travelers an ongoing opportunity to weigh in on ferry issues through web based surveys. The FROG panel has been used as the main source for WSF policy and performance surveys since. Where general public opinions have been needed, WSTC uses the statewide VOWS online survey panel to collect the survey data. The FROG panel has been supplemented with on-board surveys conducted using iPads to gather input from out-of-area, out-of-state, and local ferry riders who are not part of the FROG panel. The FROG panel currently has roughly 27,000 members with 18,500 having done 1 or more surveys since 2010.

The following laws direct the Washington State Transportation Commission's ferry rider surveys:

RCW 47.60.286

- (1) The commission shall, with the involvement of the department, conduct a survey to gather data on ferry users to help inform level of service, operational, pricing, planning, and investment decisions. The survey must include, but is not limited to:
 - (a) Recreational use;
 - (b) Walk-on customer use;
 - (c) Vehicle customer use;
 - (d) Freight and goods movement demand; and
 - (e) Reactions to potential operational strategies and pricing policies described under RCW 47.60.327 and 47.60.290.
- (2) The commission shall develop the survey after providing an opportunity for ferry advisory committees to offer input.
- (3) The survey must be updated at least every two years and maintained to support the development and implementation of adaptive management of ferry services.

RCW 47.64.355

Performance targets must be established by an ad hoc committee with members from and designated by the office of the governor, which must include at least one member from labor. The committee may not consist of more than eleven members. By December 31, 2011, the committee shall present performance targets to the representatives of the legislative transportation committees and the joint transportation committee for review of the performance measures listed under this section. The committee may also develop performance measures in addition to the following:

- (1) Safety performance as measured by passenger injuries per one million passenger miles and by injuries per ten thousand revenue service hours that are recordable by standards of the federal occupational safety and health administration and related to standard operating procedures;
- (2) Service effectiveness measures including, but not limited to, passenger satisfaction of interactions with ferry employees, cleanliness and comfort of vessels and terminals, and satisfactory response to requests for assistance. Passenger satisfaction must be measured by an evaluation that is created by a contracted market research company and conducted by the Washington State Transportation Commission as part of the Ferry Riders' Opinion Group survey. The Washington State Transportation Commission shall, to the extent possible, integrate the passenger satisfaction evaluation into the ferry user data survey described in RCW 47.60.286;**
- (3) Cost-containment measures including, but not limited to, operating cost per passenger mile, operating cost per revenue service mile, discretionary overtime as a percentage of straight time, and gallons of fuel consumed per revenue service mile; and
- (4) Maintenance and capital program effectiveness measures including, but not limited to: Project delivery rate as measured by the number of projects completed on time and within the omnibus transportation appropriations act; vessel and terminal design and engineering costs as measured by a percentage of the total capital program, including measurement of the ongoing operating and maintenance costs; and total vessel out-of-service time.

The ad hoc committee described in subsection (1) of this section expires December 31, 2011

General Overview of Study Efforts

General Overview of Study Efforts

The 2016 research initiative consisted of the following studies:

Survey	Sample Universe	Interviewing Month
Ferry Naming Quick Poll	VOWS & FROG Panel members	January 2016
Winter Rider Survey	FROG Panel members	March 2016
Freight Shipper Survey	Freight Companies using WSF	May 2016
General Public Survey	VOWS Panel members	June 2016
Summer Reservation Survey	FROG Panel members	July 2016
Summer Onboard Rider Survey	Ferry Riders not in panel	October 2016
Summer Rider Survey	FROG Panel members	October 2016

The objective of the 2016 research was to understand travel behavior, satisfaction with WSF performance on key attributes, and opinions regarding key issues currently facing the state ferry system among key customers including: ferry riders who are part of the FROG panel, freight shippers who use WSF, infrequent WSF riders who are not part of the panel, users of the WSF reservation system, and the general public. This overall objective resulted in the following main areas of exploration:

- ❖ Winter/Summer Rider satisfaction with WSF performance overall and on key attributes
- ❖ Winter/Summer Rider travel behavior
- ❖ Current and potential recreational usage of WSF
- ❖ Freight shipper's usage and attitudes towards WSF
- ❖ Attitudes towards WSF held by the general public
- ❖ Attitudes about fare structure
- ❖ Attitudes about capital funding and maintenance needs
- ❖ Attitudes about the WSF reservation system

Data was analyzed and reported on by EMC Research. More detailed information for each survey can be found in the technical reports included on the enclosed CD.

Overview of Technical Reports

Overview of Technical Reports

Results of each study are documented in detail in their own technical report on the enclosed CD, and are briefly outlined below.

Ferry Naming Quick Poll (VOWS & FROG Panels)

A one question poll presented three possible names for the WSTC's next new ferry, all of which are connected to the state of Washington. The quick poll was completed by 10,967 respondents from both the VOWS and FROG Panels.

Winter Rider Survey (FROG Panel)

An in-depth study of rider satisfaction fielded at the end of the 2016 winter travel period. The study, based on 3,134 completed surveys, resulted in a detailed understanding of WSF performance at all levels of contact with riders.

Freight Shipper Survey (Freight Shippers using WSF)

A general usage and satisfaction survey conducted in May 2016 with freight shipping companies that tested: WSF usage, travel behaviors, value perception, congestion pricing, and opinions on the reservation system. A total of 100 executive level telephone interviews were conducted.

General Public Survey (VOWS Panel)

A study of the general public conducted in June 2016 to gauge ferry ridership, trip purpose, importance of WSF to the state, capital funding issues, and fare recovery levels. A total of 6,332 completed surveys were collected via the VOWS panel.

Reservation Survey (FROG Panel)

A study of the FROG panel conducted in July 2016 concerning the reservation system, including user thoughts concerning issues and satisfaction with the system. 5,414 completed surveys were collected from the FROG panel.

Summer On-Board Rider Survey (In-person On-Board Survey)

A short on-board usage and satisfaction survey conducted during the peak summer travel period with ferry riders who are not part of the FROG panel that tested: overall satisfaction, percent ferry fares are of their total trip costs, reasons for using WSF, and future WSF usage. A total of 7,279 surveys were completed and respondents tended to be from out of the area or out of state.

Summer Rider Survey (FROG Panel)

A rider survey conducted in October 2016 focusing on customer service performance issues in four areas: terminals, loading/unloading, loading crew directions, and vessel maintenance/safety. A total of 4,827 completed surveys were collected.

In addition to the technical reports, a variety of supporting and supplemental information is available for each study. This information includes the survey questionnaires, raw data files (in SPSS) and data tables. These files can be found on the enclosed CD.

Research (excluding data collection and survey instrument design) and analysis was conducted by EMC Research and Research Assurance conducted the data collection and survey instrument design, with input from the WSTC Research Team. Pacific Market Research of Seattle was used to collect the data for the on-board surveys.

For questions regarding this research, or to request any additional information not included in this report or the accompanying CD, please contact the WSTC offices at (360) 705-7070.

General Ferry Rider Travel Habits – Summary

General Ferry Rider Travel Habits – Summary

Contains information regarding:

- ❖ Ridership frequency
- ❖ Boarding method and purpose
- ❖ Ticket type

Information gathered from the following surveys*:

Winter Rider Survey

F.R.O.G. panel

Summer Rider Survey

F.R.O.G. panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Seattle/Bainbridge and Edmonds/Kingston are the most used routes in both summer and winter.

For summer travel, the average number of trips per month has increased on most routes since 2014.

For winter travel, the average number of trips per month has decreased on all routes since 2014. The biggest drops in average trips per month are on the Mukilteo/Clinton and Fauntleroy/Vashon routes.

A plurality of riders are still driving on to the ferries, and a majority are also using ferries primarily for commuting.

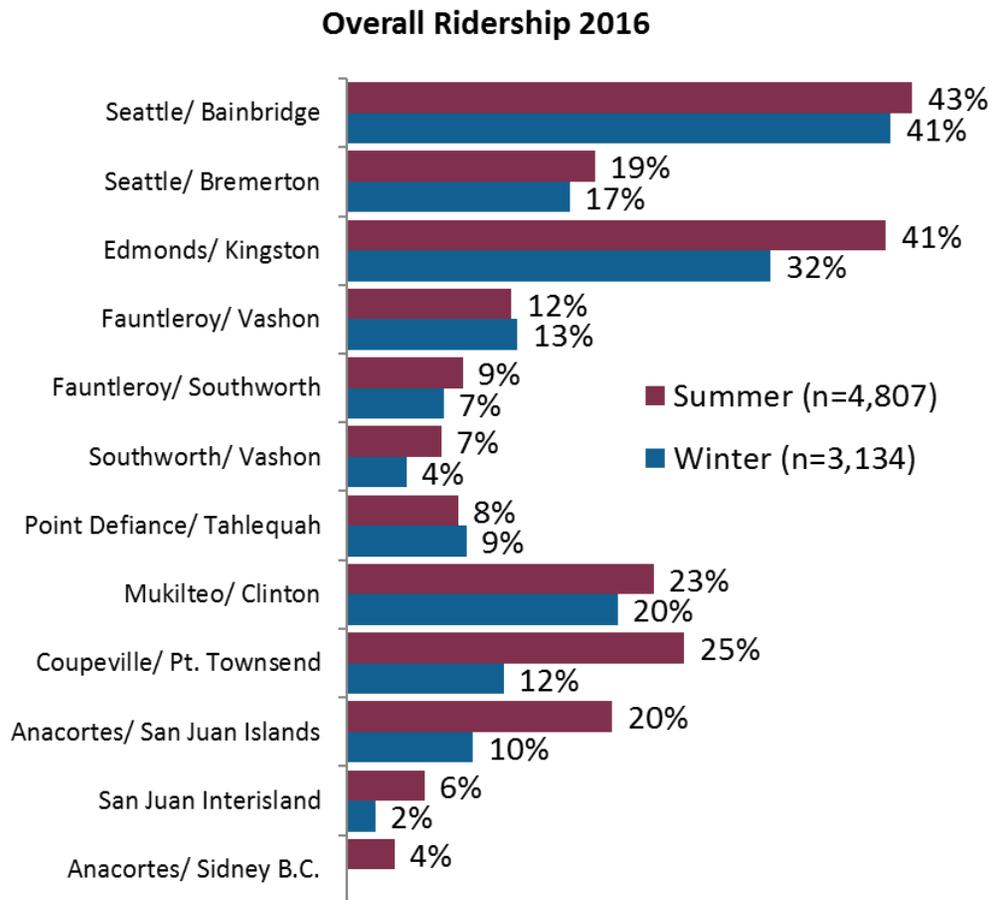
The Seattle/Bainbridge and Seattle/Bremerton routes have more walk on riders than drivers in the summer.

In both summer and winter, most riders continue to use Multi or Single Ride tickets.

General Ferry Travel Habits – Detailed Findings

Ridership Frequency – FROG Panel

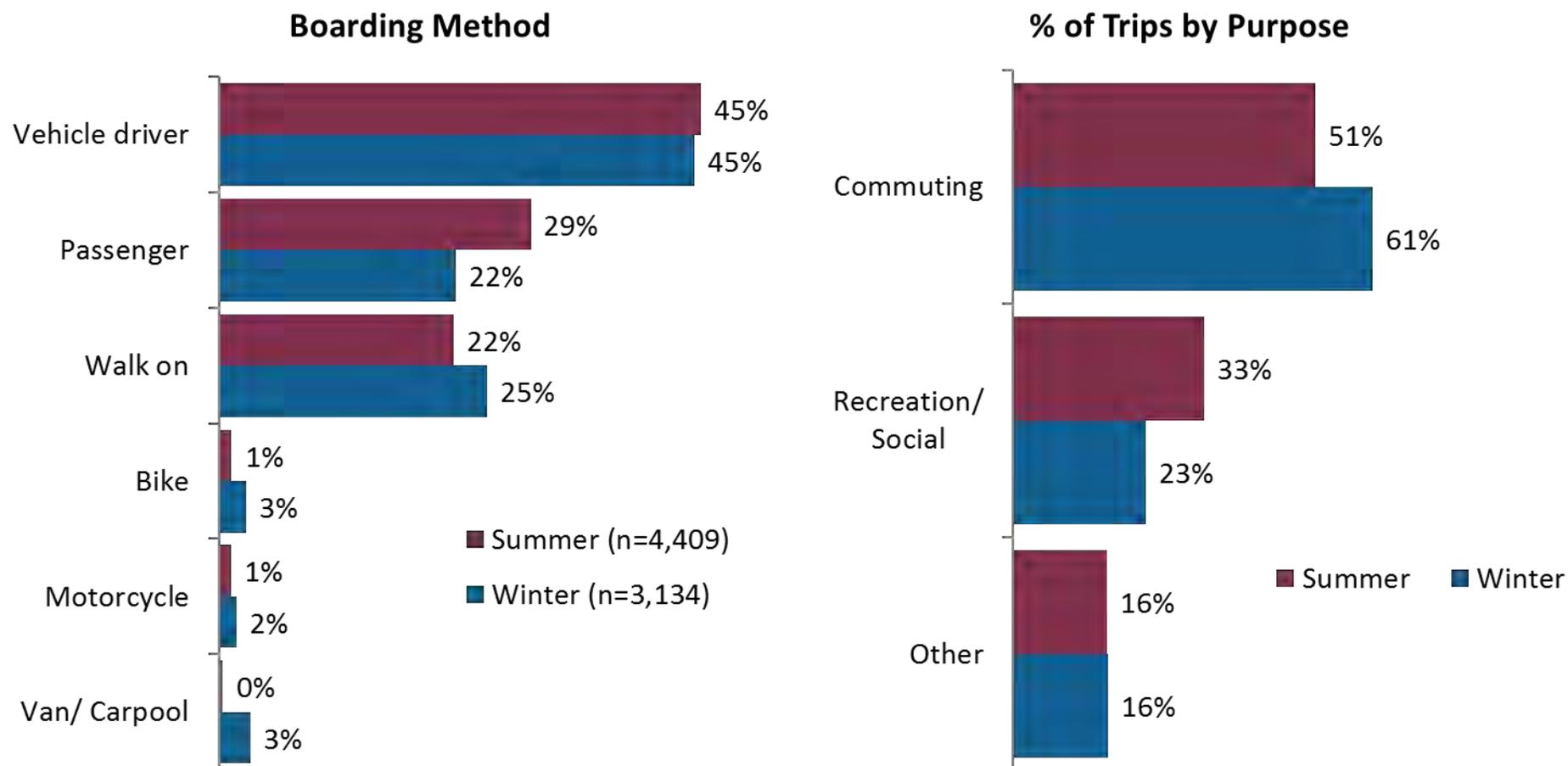
The total average number of trips per month in summer has increased among most routes since 2014, while the average in winter has decreased among all routes. The biggest increase in average trips/month was in the summer on the Point Defiance/Tahlequah route (+1.8 trips). The biggest decreases were in the winter on the Mukilteo/Clinton (-4.7 trips) and Fauntleroy/Vashon (-4.1 trips) routes.



Avg. # of trips per month per rider					
Summer			Winter		
2014	2016	Change	2014	2016	Change
11.2	11.6	+0.4	11.5	8.4	-3.1
12.2	12.8	+0.6	12.8	9.9	-2.9
5.8	6.0	+0.2	7.8	5.2	-2.6
12.0	12.4	+0.4	13.3	9.2	-4.1
7.8	7.3	-0.5	9.4	8.4	-1
3.7	4.0	+0.3	4.3	3.7	-0.6
6.4	8.2	+1.8	7.6	5.3	-2.3
11.1	11.7	+0.6	13.3	8.6	-4.7
2.4	2.4	0	2.8	1.9	-0.9
4.3	3.8	-0.5	4.4	2.8	-1.6
3.0	2.6	-0.4	4.1	2.6	-1.5
1.4	1.4	0	--	--	--

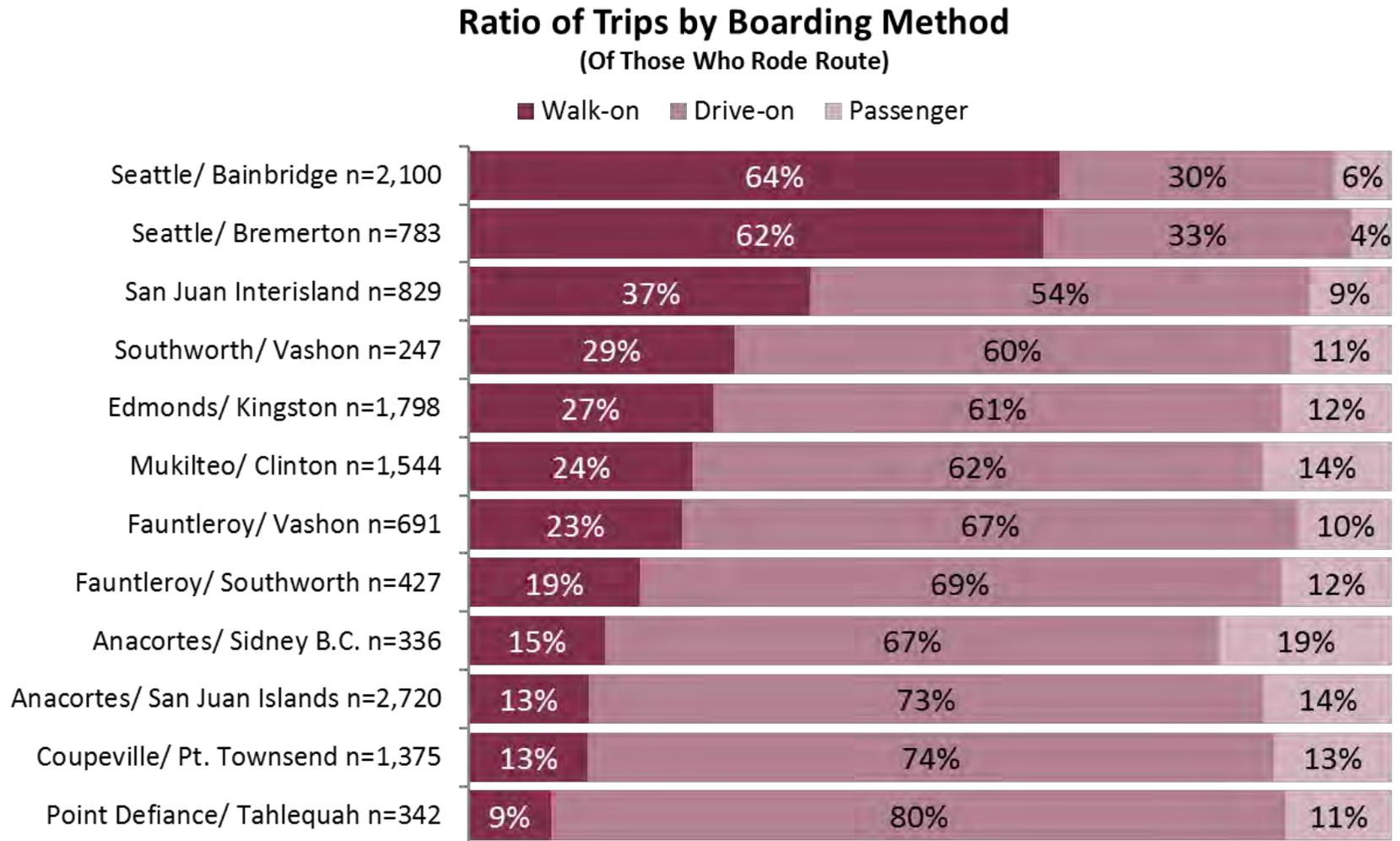
Boarding Method and Purpose – FROG Panel

Respondents were asked about the details of their most recent ferry trip, including boarding method, vehicle type, and the purpose of their trip. During both summer (74%) and winter (67%), most boarded either as vehicle driver or passenger in a vehicle. About a quarter walked on in summer (22%) and winter (25%). As expected, there are more recreational users in the summer period (33% Summer vs. 23% Winter). Winter ridership is more focused around commuting (61% Winter vs. 51% Summer).



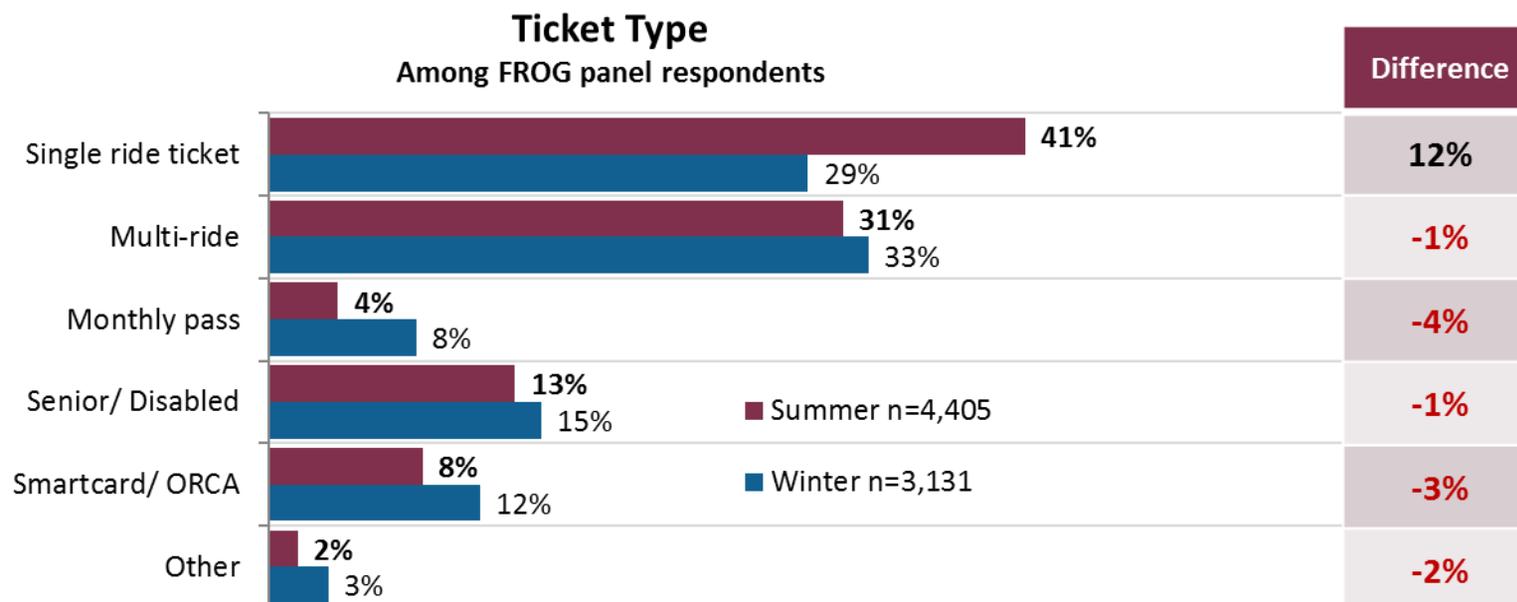
Boarding Method by Route – FROG Panel (Summer)

The Seattle/Bainbridge (64%) and Seattle/Bremerton (62%) routes have the highest proportion of summer walk-on travelers; on all other routes, drive-on is the highest percentage.



Ticket Type – FROG Panel

Approximately a third of riders use multi ride tickets in summer and winter. However, a plurality of summer riders use single ride tickets (41%) compared to less than one-third of winter riders. Use of single ride tickets is much higher in summer. Monthly passes and Smartcard/Orca cards make up 8% of tickets in the summer and 12% in the winter.



Recreational Ferry Rider Travel Habits – Summary

Recreational Ferry Rider Travel Habits – Summary

Contains information regarding:

- ❖ Recreational ferry usage
- ❖ Recreational trip characteristics
- ❖ Recreational trip purpose & cost

Information gathered from the following surveys*:

Summer Rider Survey

F.R.O.G. panel

Summer On-board Rider Survey

Onboard riders

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Almost all summer riders have used WSF to take one or more recreational trips during the year.

The Seattle/Bainbridge and the Edmonds/Kingston routes are the most frequently used for recreational trips.

As in 2014, the most commonly used ticket type for summer recreational riders is a single ride ticket (41%), with multi-ride tickets the second commonly used ticket (31%). Compared to 2014, the use of multi-ride tickets is down (-6%), and the use of single ride tickets is slightly up (+1%).

The main purpose of riders' recreational trips is visiting family and friends.

A plurality of riders from the FROG panel (typically local, more regular riders) say the cost of riding the ferry is over 25% of their recreational trip's total cost. In comparison, a majority of non-FROG Panel (typically non-local, less frequent riders) say that the cost of riding the ferry is under 10% of their total recreational trip cost.

Most recreational trips are round trips on the same ferry route, with only a few riders saying they return on a different route or only go one direction.

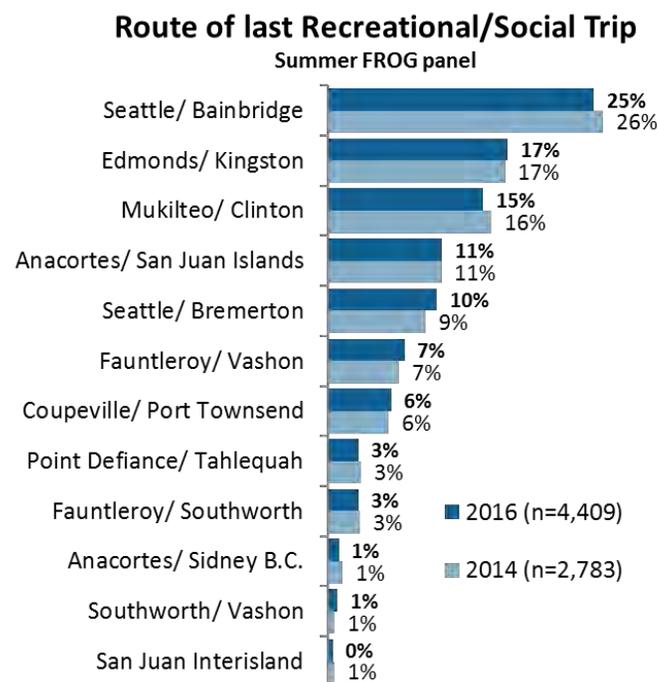
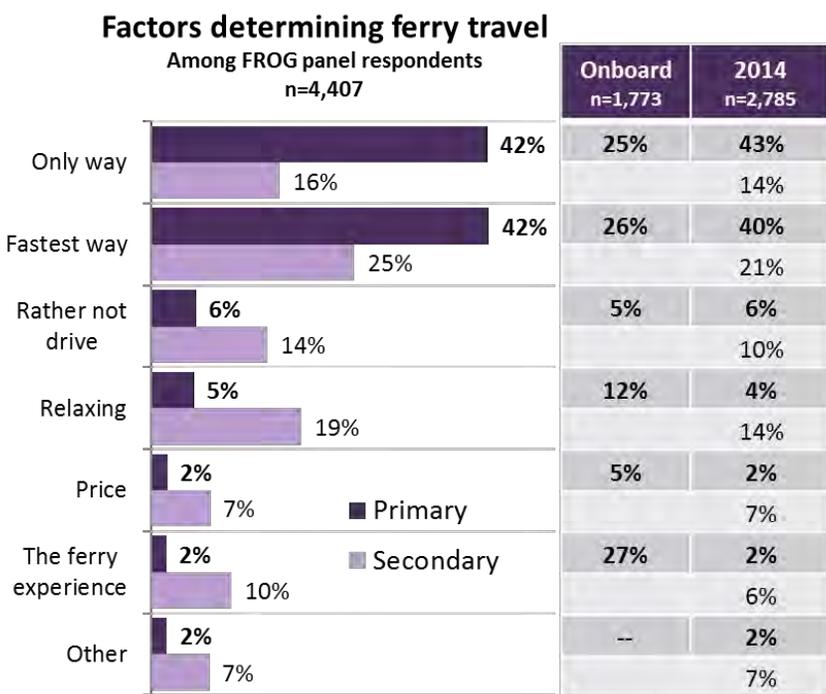
The average length of recreational trips has remained two days, the same average as 2014.

Recreational Ferry Travel Habits

Recreational Ferry Usage – FROG Panel (Summer) & Onboard Survey

In order to better understand 2016 recreational riders, respondents of the summer period rider’s survey were asked several questions regarding social and recreational travel using WSF. Most questions were in reference to riders’ most recent social or recreational trip, and were used to generate general characteristics of recreational ferry travel.

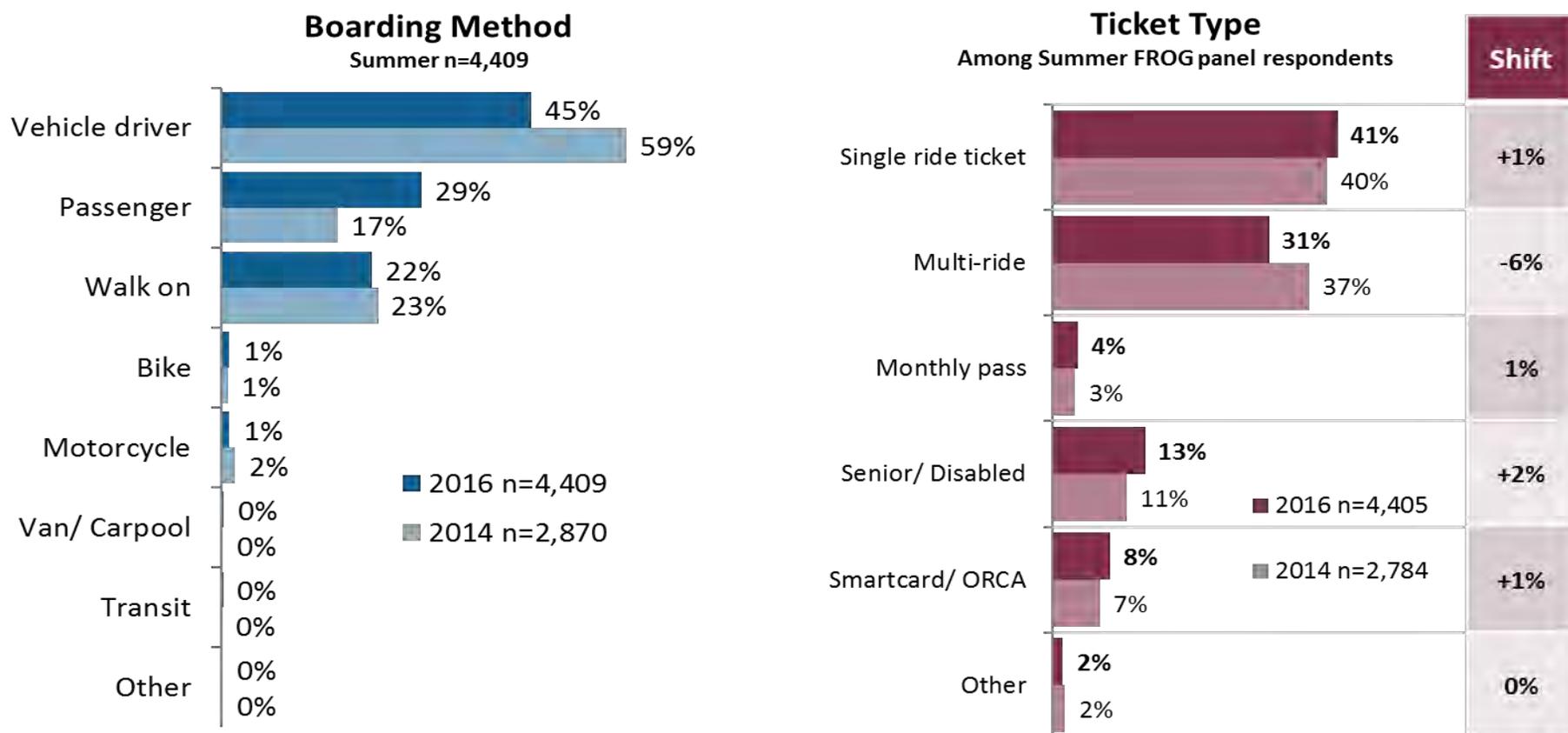
Ninety-seven percent (97%) of summer respondents said they have taken a recreational trip in the past 12 months. Seattle/ Bainbridge and Edmonds/ Kingston remain the most commonly used routes for summer recreational/social travel (below right). Recreational summer ridership by route is consistent with the 2014 and 2012 findings. When asked, what best describes the reason for choosing WSF for their last summer recreational/social trip, riders most commonly stated that it was their only way (42%), or that it was the fastest and most direct way (42%). This is consistent with the 2014 results, with 40% in 2014 staying that it was the fastest and most direct way. Onboard riders were much more likely to say they chose to ride the ferry because of the ferry experience (27% onboard vs. 2% of FROG respondents)



Recreational Trip Characteristics – FROG Panel (Summer)

2016 Summer Rider Survey respondents were also asked about the details of their last recreational or social trip involving the ferries, including the boarding method and ticket used. While the majority of recreational riders continue to board the ferry by driving on (45%), the amount decreased from 2014 by 14 percentage points. Those boarding as a vehicle passenger increased to 29% from 17% in 2014. 22% were walk on riders.

As in 2014, the most commonly used ticket type for recreational riders is a single ride ticket (41%), with multi-ride tickets the second commonly used ticket (31%). Compared to 2014, the use of multi-ride tickets is down (-6%).

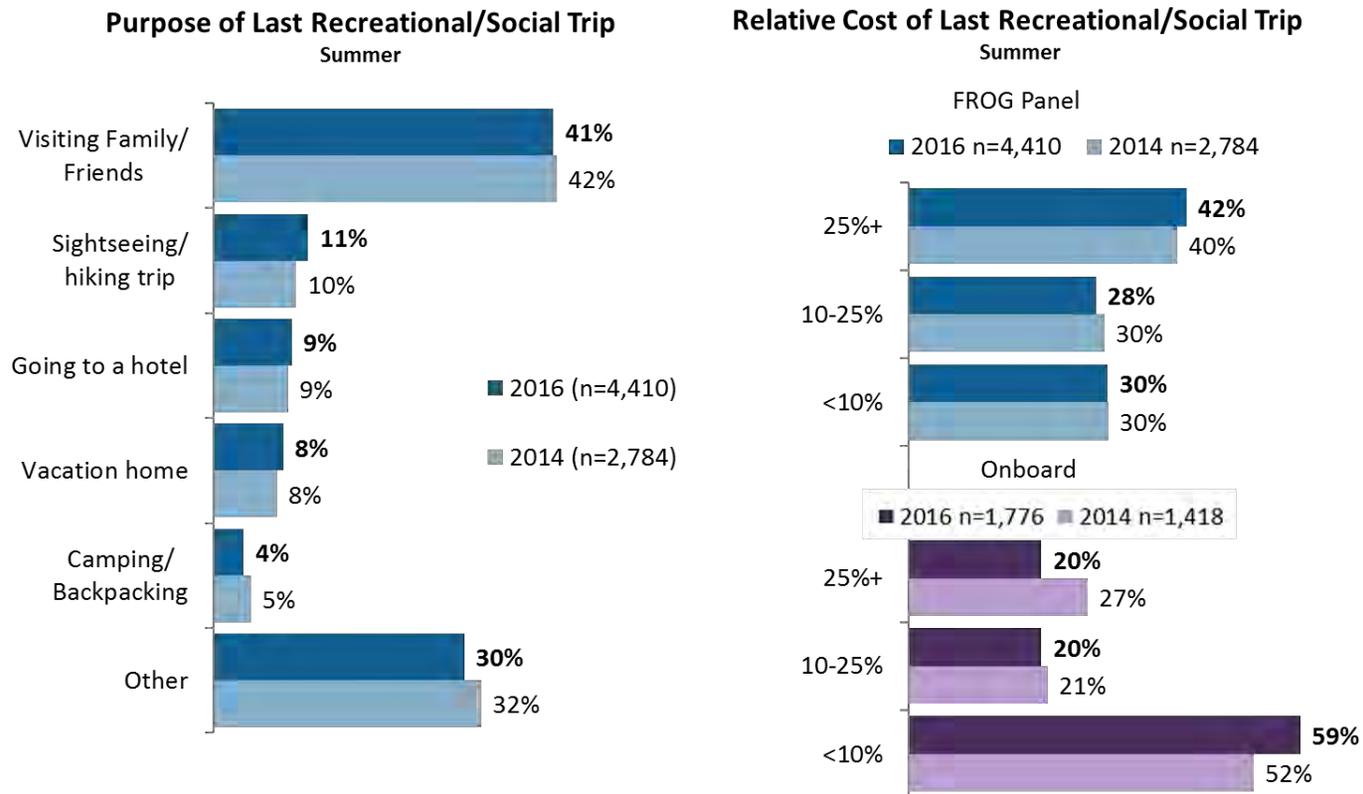


Recreational Trip Purpose & Cost – FROG Panel (Summer) & Onboard Survey

As in 2014, visiting family and friends is the top reason for summer riders' last recreational/social trip (41% in 2016 vs. 42% in 2014).

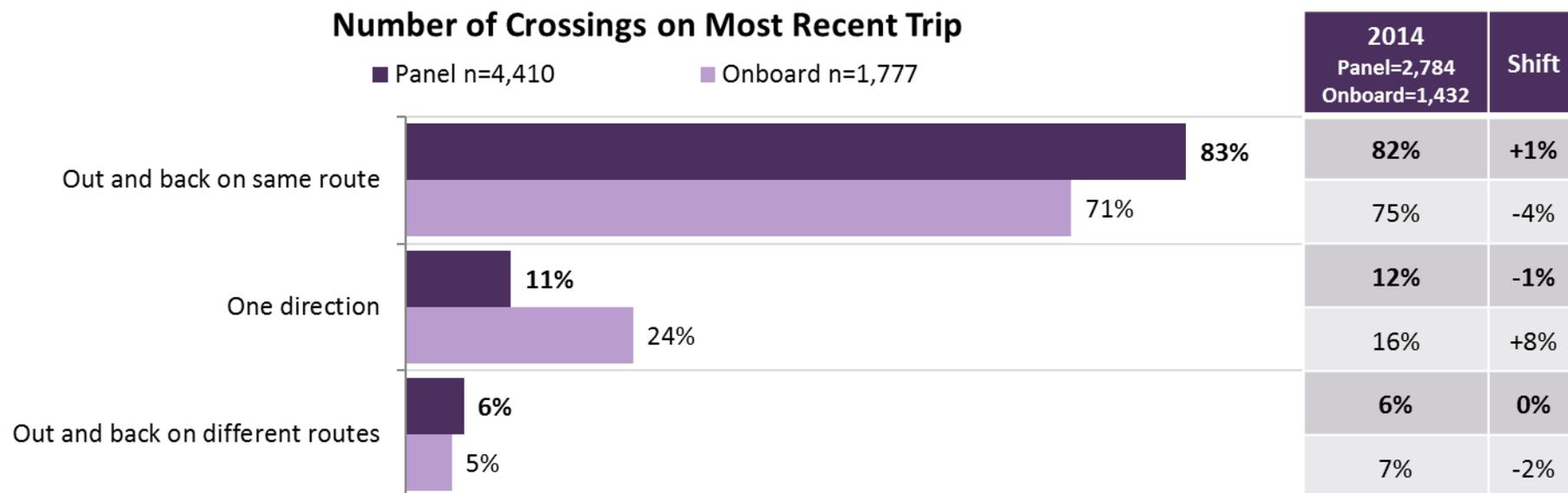
And also, similar to 2014, the cost of the ferry fare compared to the overall cost of the recreational/social trip varies, with 42% of summer riders saying the fare accounted for more than 25% of the total trip cost (similar to 2014). Fare cost is less of a factor among respondents surveyed onboard the ferries, with over half (59%) saying ferry fare accounted for less than 10% of the total trip cost. Onboard surveys data reflects the more infrequent, out-of-area/out-of-state summer recreational and social riders, which may help explain why the ferry fares accounted for less of the trip's overall cost.

Most respondents (90%) also said that their most recent recreational or social trip was part of a Washington state only trip, with 10% saying it was a multi-state or multi-nation trip.



Crossings and Trip Duration – FROG Panel (Summer) & Onboard Survey

For both FROG panel respondents and on-board survey respondents, most recreational/social trips are round trips on the same route. The average recreational trip duration for summer riders is 2 days. Anacortes/San Juan (4 days) and Anacortes/British Columbia (4 days) continue to have the longest mean trip duration.



Trip Duration		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		4,345	676	253	46	440	236	145	19	317	613	1448	68	84
2016	Mean number of days	2	2	1	1	2	2	1	1	3	2	4	2	4
2014	Mean number of days	2	2	1	2	2	2	1	2	3	2	4	2	5

Ridership Trends

Ridership Trends – Summary

Contains information regarding:

- ❖ Free Travel – Tacoma Narrows Bridge & Ferry Usage
- ❖ Factors Affecting Decision to Drive on
- ❖ Changes in WSF Usage

Information gathered from the following survey*:

Summer Rider Survey

F.R.O.G. panel

Summer On-board Rider Survey

Onboard riders

General Public Survey

VOWS panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Unlike previous years (2014 PS 32%), only about one-in-five (19%) of Puget Sound infrequent riders say their WSF travel has decreased over the last year. One-third (33%) non-Puget Sound residents say their WSF travel has decreased.

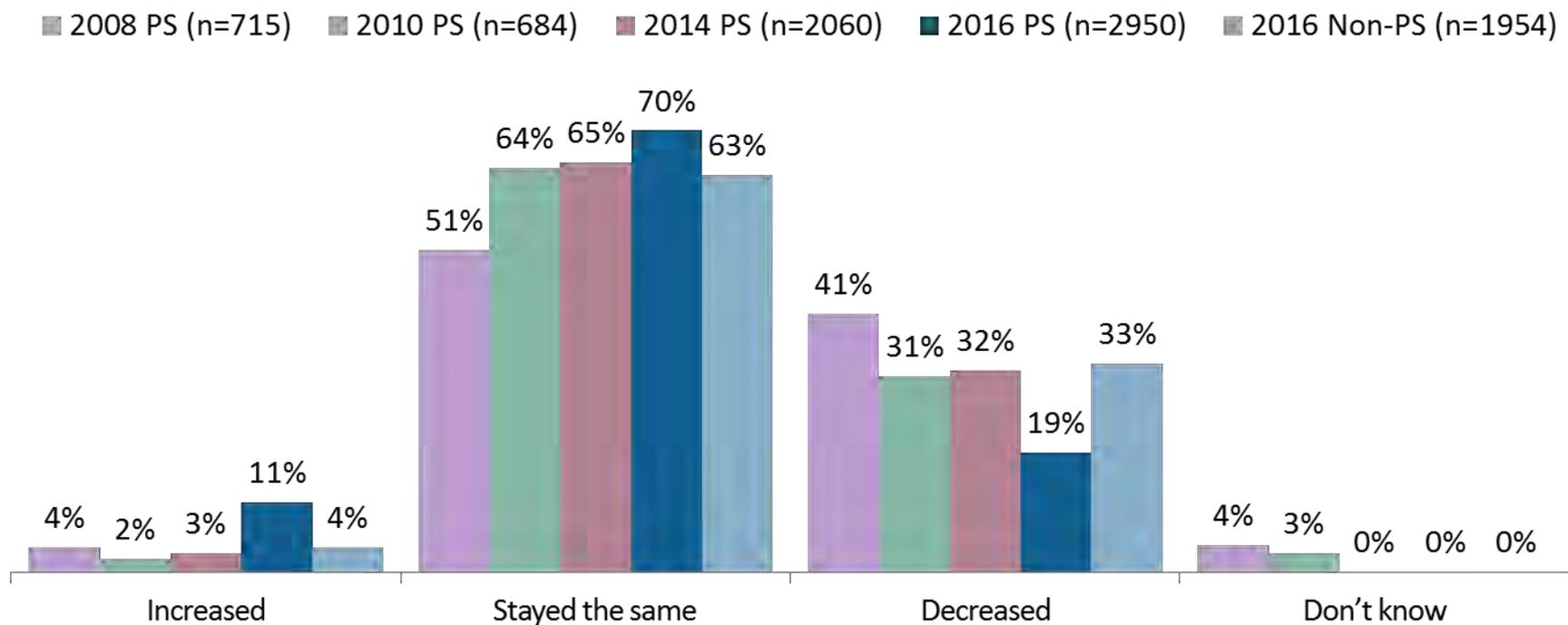
Almost all summer respondents say they are likely to use WSF again for a recreational or social trip. Better schedules/routes is the top mentioned way to increase the number of recreational or social trips.

Ridership Trends

Change in Ferry Ridership among Infrequent Riders – VOWS Panel

Unlike previous years (2014 PS 32%), only about one-in-five (19%) of Puget Sound infrequent riders (those within the general public who ride less than once a month) say their WSF travel has decreased over the last year. One-third (33%) non-Puget Sound residents say their WSF travel has decreased.

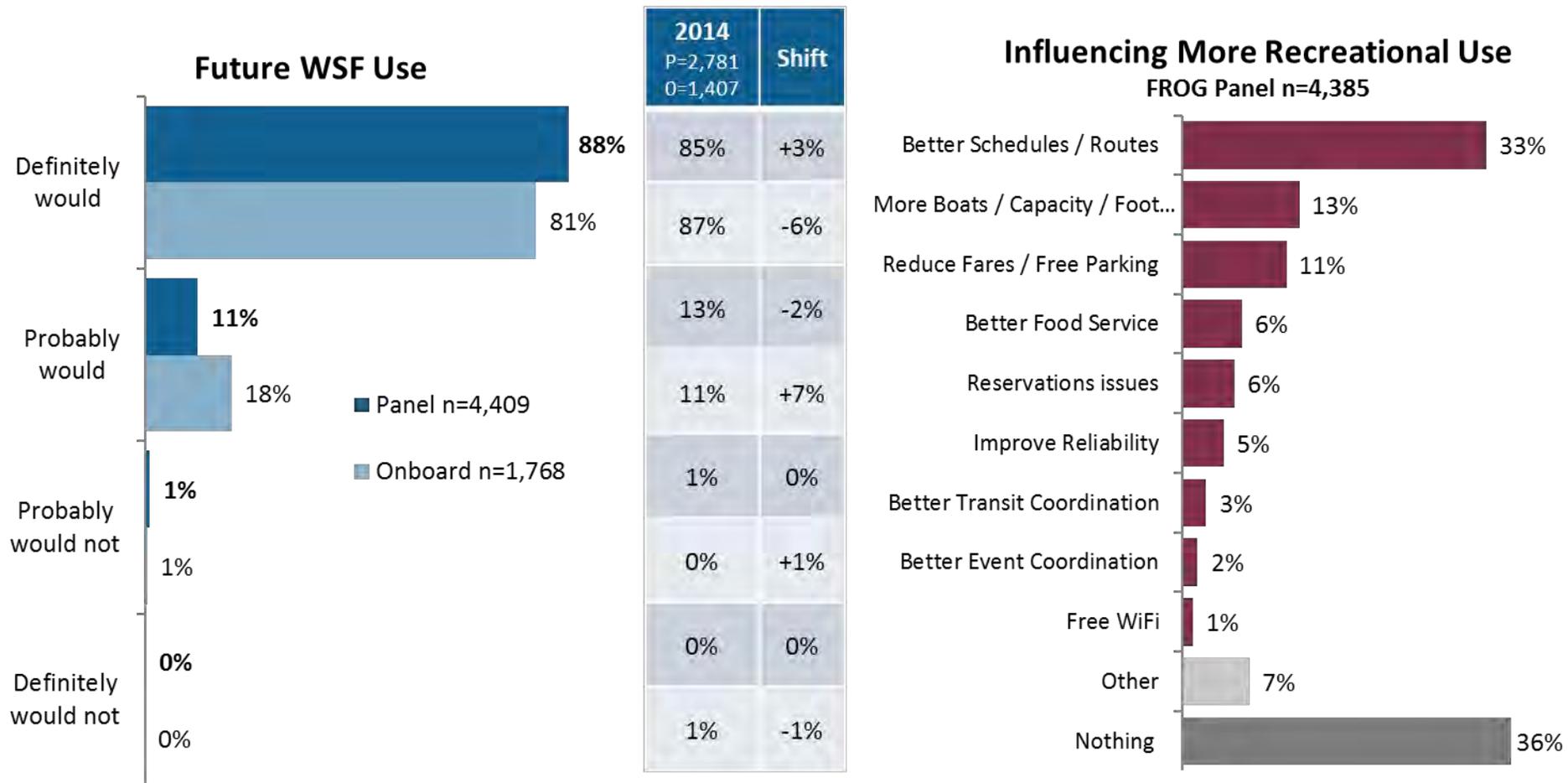
**Changes in Travel Behavior Compared to Last Year
Infrequent Travelers (2008-2016)**



Future Recreational Ridership – FROG Panel (Summer) & Onboard Survey

To assist in projecting future summer recreational ridership, both FROG panel and on-board survey respondents (typically out-of-area/out-of-state respondents) were asked about their likelihood of using WSF for recreational/social trips in the future. Additionally, suggestions were fielded for encouraging more recreational use.

Almost all respondents in both surveys say they are likely to use WSF again for a recreational or social trip. Better schedules/routes is the top suggestion for increasing the number of recreational or social trips.



Satisfaction with WSF Performance – Summary

Satisfaction with WSF Performance – Summary

Contains information regarding:

- ❖ Overall Satisfaction & perceived value
- ❖ Satisfaction with specific ferry attributes

Information gathered from the following surveys*:

Winter Rider Survey

F.R.O.G. panel

Summer Rider Survey

F.R.O.G. panel and Onboard riders

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Combined overall satisfaction (75% Satisfied/16% Dissatisfied) is similar to 2014 (74%/18%). The percentage of FROG Panel summer riders saying they are dissatisfied has decreased slightly (30% in 2014 to 26% in 2016). FROG Panel summer riders – who tend to be regular riders – are about six times more dissatisfied than onboard survey respondents – who tend to be non-local, occasional riders.

Combined overall perceived value (75% Good Value / 12% Poor Value), is similar to 2014 (73% / 14%). The percentage of FROG Panel summer riders saying WSF is a “good” or “very good” value has increased slightly from 2014 (73% vs. 67%).

Only two of 24 attributes tested in the winter survey – "adequate parking near terminals" and "terminal bathrooms clean" – had overall dissatisfaction levels above 20%.

In the winter survey, overall satisfaction is highest for "vessel crew is friendly" (86%), "vessel crew is helpful" (86%), "toll booth staff is friendly" (86%), "buying tickets is easy and quick" (81%), and "passenger seating areas are clean" (81%).

About three quarters of winter and summer riders have used the WSF website and almost all are satisfied with the experience.

Very few respondents (12% or less) have contacted WSF customer service by phone and those who have are satisfied with their experience. Dissatisfaction was somewhat higher in summer than the winter (18% Dissatisfied vs. 13% Dissatisfied).

Only about one quarter of winter riders have interacted with WSF terminal staff, and a majority (66%) are satisfied with their experience - 20% say they were dissatisfied.

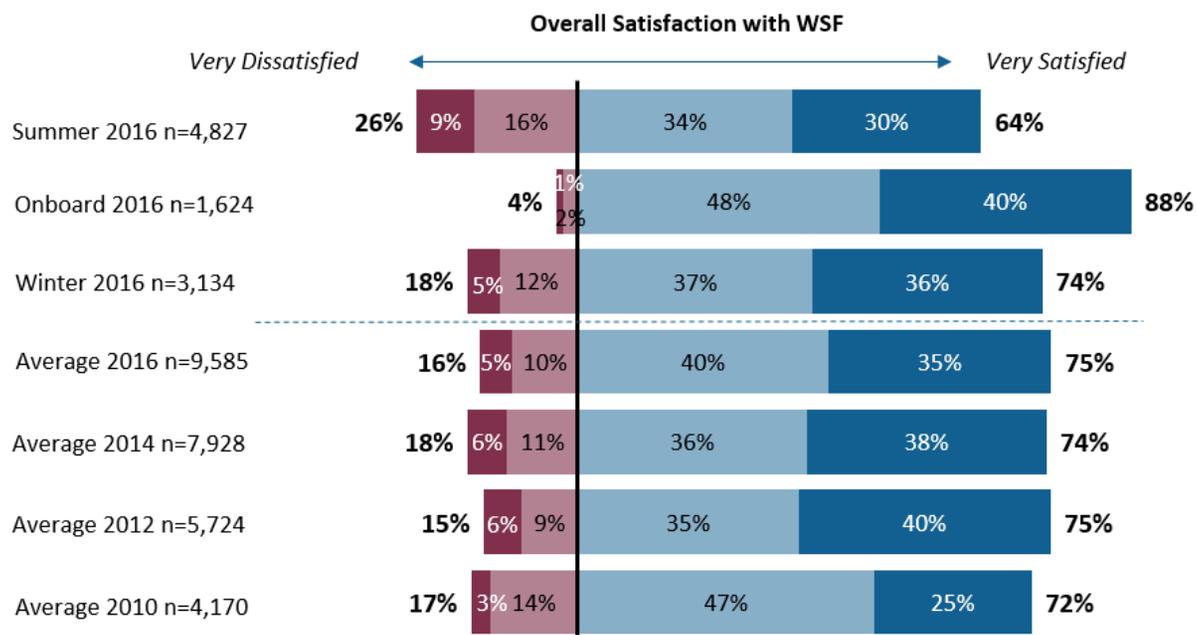
Satisfaction with WSF Performance – Detailed Findings

Satisfaction – FROG Panel & Onboard Survey

In order to get a representative picture of rider satisfaction, the summer, winter, and on board survey respondents were all asked to rate their overall satisfaction with Washington State Ferries. In addition, riders were asked how they feel about the value of WSF as a mode of transportation.

The combined overall satisfaction score in 2016 (75% Satisfied / 16% Dissatisfied), is similar to 2014 (74% / 18%), 2012 (75% / 15%) and 2010 (72% /17%).

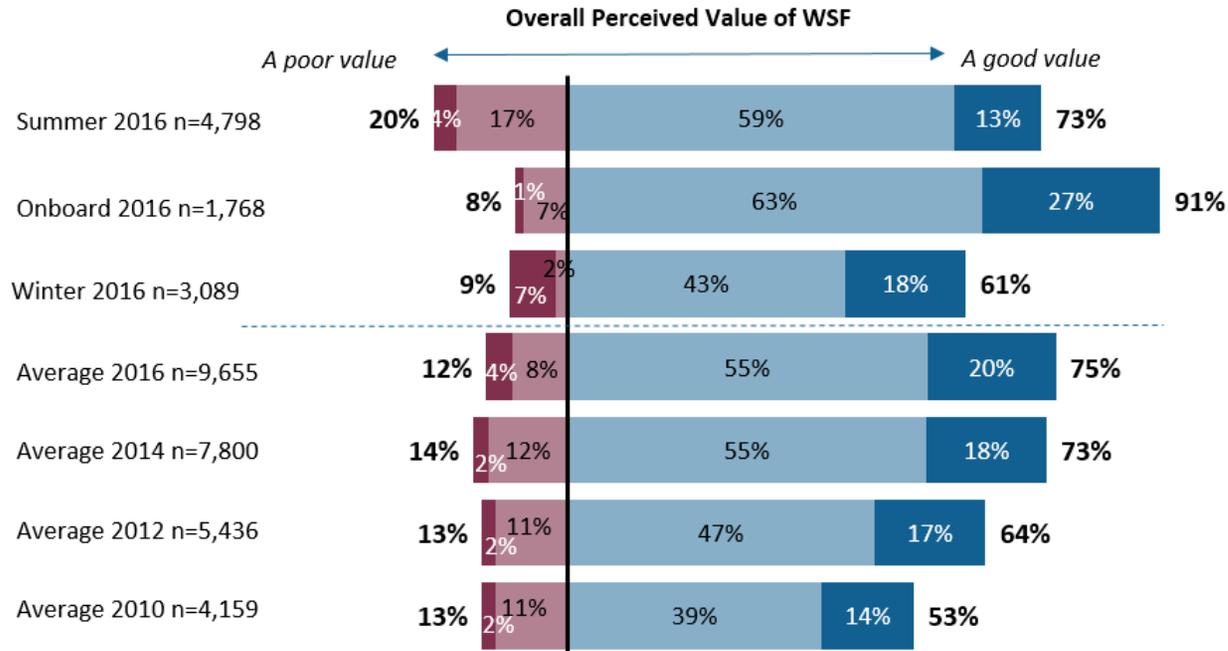
On board survey respondents – who tend to be non-local occasional/recreational riders are the most satisfied (88% Satisfied / 4% Dissatisfied). The percentage of summer riders from the FROG Panel saying they are dissatisfied has decreased slightly to 26% from 30% in 2014. Winter FROG Panel riders are mostly satisfied (74% Satisfied / 18% Dissatisfied).



Perceived Value – FROG Panel & Onboard Survey

The combined overall perceived value in 2016 (75% Good Value / 12% Poor Value), is similar to 2014 (73% / 14%).

Among summer riders from the FROG panel, the percentage saying WSF is a “good” or “very good” value (73%) has increased slightly compared to 2014 (67%). On board survey respondents overwhelmingly believe WSF is a good value.

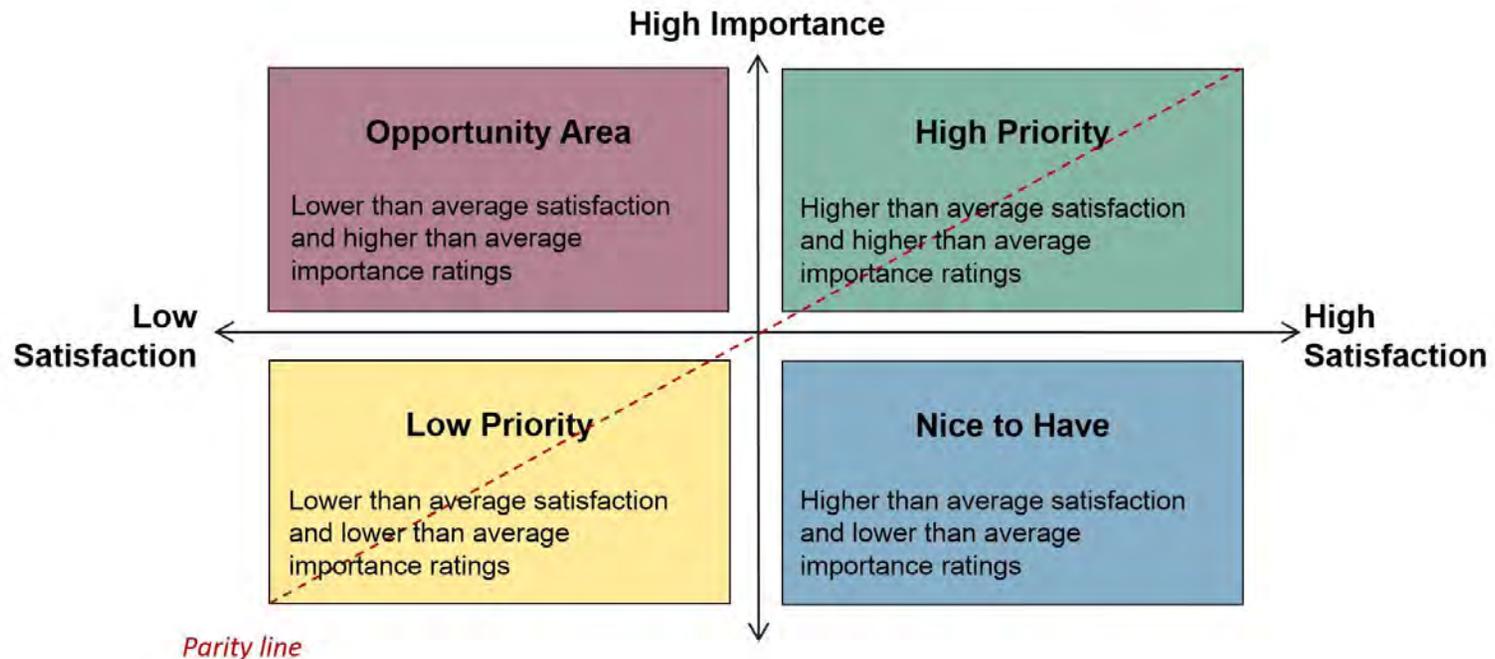


WSF Performance Satisfaction – FROG Panel

The following section outlines the relative importance and satisfaction with specific ferry features among summer and winter riders. Features considered highly important, but with low satisfaction (top left) indicate opportunity areas for WSF to improve overall customer service. Each quad chart is overlaid with a diagonal parity line, which represents where importance and satisfaction are equal, and identifies the ferry attributes with the greatest amount disparity between importance and satisfaction.

For each attribute falling into the “opportunity area,” a more detailed snapshot is provided following the quad chart, detailing importance, satisfaction and dissatisfaction by route, as well as respondents' verbatim comments explaining reasons for their dissatisfaction. The outline of the quad chart and detailed information for “opportunity area” attributes is shown for both winter and summer riders.

Additionally, route-specific importance/satisfaction ratings, as well as detailed snapshots for each tested attribute as described above, can be found in the technical reports for the Winter and Summer surveys which are included on the enclosed CD.



Only two of 24 attributes – "adequate parking near terminals" and "terminal bathrooms clean" – had overall dissatisfaction levels above 20%. Another six attributes have dissatisfaction levels between 10% and 20%. Overall satisfaction is highest for "vessel crew is friendly" (86%), "vessel crew is helpful" (86%), and "toll booth staff is friendly" (86%).

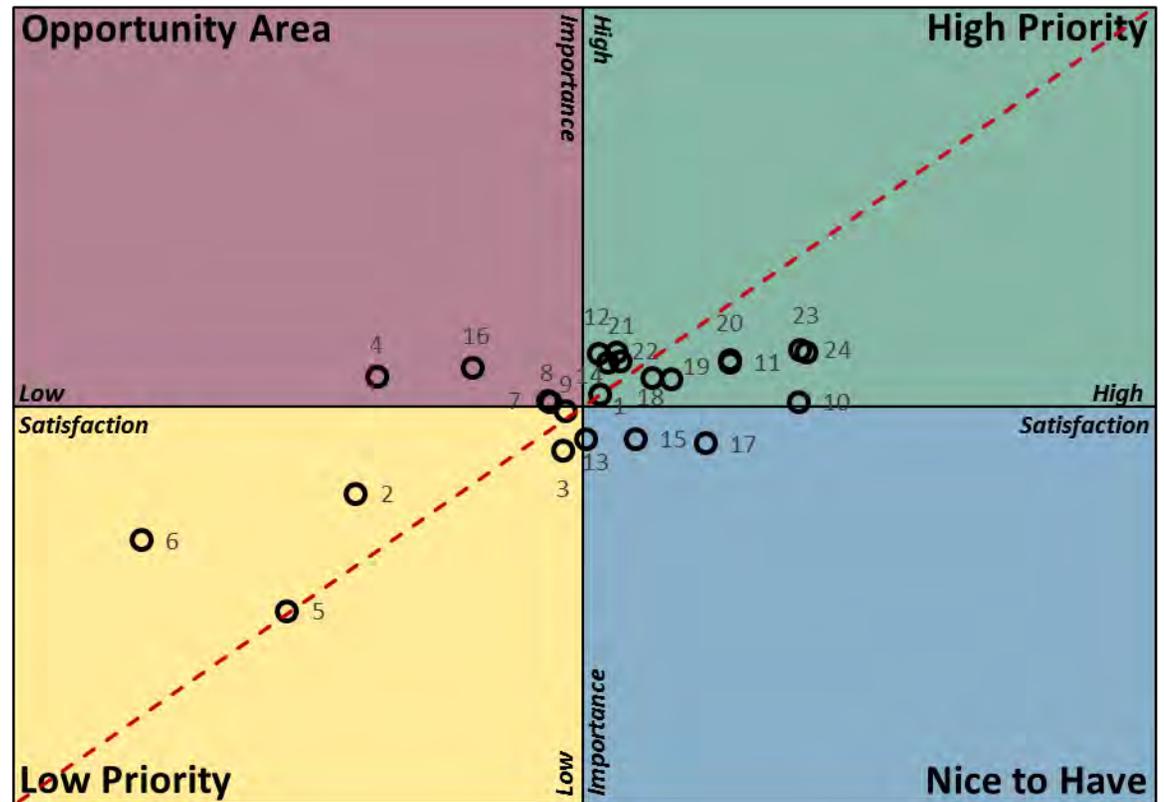
Code	Attributes	Winter 2016		Winter 2015		Winter 2014	
		Dissatisfaction	Satisfaction	Dissatisfaction	Satisfaction	Dissatisfaction	Satisfaction
6	Adequate parking near terminals	31%	40%	25%	42%	26%	43%
4	Terminal bathrooms clean	20%	56%	21%	55%	21%	54%
2	Terminals are comfortable	17%	55%	14%	54%	16%	53%
5	WSF and Transit schedules coordinated	15%	50%	14%	45%	14%	48%
16	Loading crews provide clear directions	14%	63%	15%	61%	13%	65%
12	Efficiently processes vehicles	11%	72%	12%	69%	11%	70%
7	Easy loading/ unloading for walk-on	11%	68%	9%	72%	10%	73%
8	Passenger loading efficient	11%	68%	9%	72%	8%	74%
14	Loading procedures efficient	9%	72%	9%	71%	9%	73%
9	Passenger unloading efficient	9%	70%	9%	73%	8%	74%
15	Loads ferries to capacity	9%	74%	9%	71%	7%	73%
22	Vessels are well maintained	8%	73%	11%	67%	8%	73%
21	Ferries Bathrooms are clean	8%	73%	10%	70%	8%	72%
3	Terminal Staff is helpful	8%	69%	8%	67%	8%	67%
18	Unloading procedures efficient	7%	76%	8%	76%	7%	76%
1	Terminals are clean	7%	72%	7%	69%	7%	71%
11	Buying tickets easy and quick	6%	81%	6%	81%	5%	81%
13	Vehicle loading crew is friendly	6%	71%	6%	70%	9%	69%
20	Passenger seating areas are clean	5%	81%	5%	77%	5%	79%
19	Unloading crews provide clear directions	5%	77%	5%	77%	4%	79%
23	Vessel crew is friendly	4%	86%	3%	86%	4%	87%
24	Vessel crew is helpful	3%	86%	4%	84%	4%	85%
10	Toll booth staff is friendly	3%	86%	4%	84%	4%	84%
17	Unloading crew is friendly	3%	79%	3%	78%	3%	78%

Winter Rider Satisfaction – FROG Panel

Overall, terminal bathroom cleanliness (4), clear loading crew directions (16), easy loading/unloading for walk-on (7), and passenger loading efficiency (8) are key opportunity areas from winter 2016 respondents.

Attribute Key	
1	Terminals are clean
2	Terminals are comfortable
3	Terminal Staff is helpful
4	Terminal bathrooms clean
5	WSF and Transit schedules coordinated
6	Adequate parking near terminals
7	Easy loading/ unloading for walk-on
8	Passenger loading efficient
9	Passenger unloading efficient
10	Toll booth staff is friendly
11	Buying tickets easy and quick
12	Efficiently processes vehicles
13	Vehicle loading crew is friendly
14	Loading procedures efficient
15	Loads ferries to capacity
16	Loading crews provide clear directions
17	Unloading crew is friendly
18	Unloading procedures efficient
19	Unloading crews provide clear directions
20	Passenger seating areas are clean
21	Ferries Bathrooms are clean
22	Vessels are well maintained
23	Vessel crew is friendly
24	Vessel crew is helpful

Satisfaction vs. Importance Ratings (n=1263-2856)



Winter Opportunity Area – Terminal Bathroom Cleanliness

Seattle/Bremerton (34%) and Seattle/Bainbridge (29%) have the highest dissatisfaction ratings for clean and well maintained bathrooms. Among those riders who are dissatisfied with bathroom cleanliness (20%), an overwhelming majority (78%) said it was the Seattle terminal where they experienced an unsatisfactory service level.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1853	477	169	31	184	159	52	11	78	279	380	33
The bathrooms in the terminals are clean and well maintained	Imp. (4-5)	94%	93%	94%	94%	95%	92%	98%	89%	98%	95%	92%	99%
	Sat. (4-5)	56%	42%	42%	62%	67%	74%	74%	46%	66%	72%	59%	58%
	Dissat. (1-2)	20%	29%	34%	20%	13%	6%	2%	--	17%	10%	14%	16%
2015	Dissat.	21%	29%	41%	11%	12%	2%	5%	24%	0%	8%	17%	18%
Change	Dissat.	-1	--	-7	+9	+1	+4	-3	-24	+17	+2	-3	-2

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints
Seattle	78%	Seattle - Bad smell, hand dryer partly melted/disfigured. Seattle - Bathrooms are always messy, floors have liquid all over them, toilet paper on floor, nasty smell from decontaminate or air 'freshener,' hand dryer is dirty.
Bremerton	8%	Seattle - Bathrooms smell like someone peed all over the place. Very strong urine Smell. Toilet seat broken. I avoid terminal bathrooms and try to hold til on boat.
Mukilteo	5%	Seattle - Problem number one is that the ferry terminal restrooms seem to be closed very early...sometimes as early as 9:00 PM, forcing people to use the disgusting portable toilets in the parking lot. I'm guessing the staff closes them early so they can end their.
Bainbridge	5%	Seattle - The bathrooms in the Seattle terminal are DISGUSTING! It's very apparent that homeless people frequent the bathroom. Also, please put paper towels back in the men's bathroom. The Dyson air dryer is always disgustingly filthy. Bremerton - Bathrooms always stink. Bremerton bathrooms are nasty. Litter on the floor is common. There are no paper towels so bare hands must be used to open the doors. YUCK!!!
Clinton	4%	Mukilteo - Restrooms in poor condition & smell. Bainbridge - Ugly bathrooms that need to be refurbished (even the 'new restroom' in the Bainbridge terminal was poorly thought through and designed. You should consult women when designing women's restrooms.) Not enough stalls for women.

Attribute Key Code - 4

Winter Opportunity Area – Vehicle Loading Crews Provide Clear Directions

Dissatisfaction is highest for Fauntleroy/Southworth (25%)* loading crews. Among those riders who are dissatisfied with the vehicle loading crews' directions (15%), the Fauntleroy (22%), Seattle (21%), and Mukilteo (20%) terminals are cited as the most unsatisfactory regarding clear directions.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		2706	474	139	57	294	212	76	12	91	460	829	62
WSF vehicle loading crews provide clear directions / hand signals	Imp. (4-5)	95%	93%	95%	97%	95%	97%	95%	88%	99%	95%	94%	100%
	Sat. (4-5)	63%	68%	67%	48%	67%	53%	52%	31%	82%	59%	61%	58%
	Dissat. (1-2)	14%	8%	12%	18%	12%	20%	25%	47%	9%	18%	18%	16%
2015	Dissat.	15%	13%	11%	13%	13%	22%	22%	12%	5%	18%	20%	29%
Change	Dissat.	-1	-5	+1	+5	-1	-2	+3	+35	+4	--	-2	-13

*Among those routes that have a substantial number of respondents.

Top 5 Unsatisfactory Terminals	Example of Verbatim Complaints
Fauntleroy 22%	Seattle - Crew directed cars to an outside lane on the ferry, but were not stationed to prevent cars from parking in a prohibited area (where the yellow paint on the surface is not visible if you are trailing other cars onto the ferry).
Seattle 21%	Seattle - Crew members give vague hand signals and act angry when not understood. Communicating more clearly, and acting less disgruntled, would go a long way towards improving the situation.
Mukilteo 20%	Fauntleroy - Late or no hand signals from crew, and then anger from the next crew member at customer not going where he/she expected. Contradictory hand signals from various crew.
Clinton 14%	Fauntleroy - Sometimes crews are distracted and hand signals can be a little more clearer. Also it seems different crews have different loading lane procedures loading and unloading. Is there a standard we every day drivers can anticipate?
Edmonds 12%	Mukilteo - Directions/hand signals are not consistent among crew members.
	Mukilteo - Most workers are great, but some will give small, unclear hand signals and then get frustrated and sometimes yell if they aren't followed. Having whistles instead of yelling to get drivers attention might be a better way.
	Clinton - Hand signals were vague and staff was not looking at me to know I could not understand.

Attribute Key Code - 16

Winter Opportunity Area – Easy Loading/Unloading for Walk-on

The Mukilteo/Clinton route has the highest dissatisfaction rating for ease of loading/unloading for walk-on passengers, where one-in-five (19%) report being dissatisfied. Among the 11% who indicated they are dissatisfied, almost half (46%) said it was the Seattle terminal where they had an unsatisfactory experience.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/BAIN	SEA/BRE	PTD/TAH	EDM/KIN	FAU/VAS	FAU/SOU	SOU/VAS	PTT/COU	MUK/CLI	ANA/SJI	INTER SJI
Respondents		1537	471	158	31	170	137	35	9	34	223	231	38
WSF provides easy loading and unloading for walk-on passengers	Imp. (4-5)	92%	92%	92%	87%	94%	92%	90%	73%	98%	90%	87%	71%
	Sat. (4-5)	68%	63%	70%	87%	81%	70%	64%	26%	91%	62%	64%	74%
	Dissat. (1-2)	11%	13%	10%	--	6%	5%	13%	14%	7%	19%	13%	11%
2015	Dissat.	9%	12%	8%	--	4%	9%	7%	--	--	11%	10%	11%
Change	Dissat.	+2	+1	+2	--	+2	-4	+6	+14	+7	+8	+3	--

Top 5 Unsatisfactory Terminals		Example of Verbatim Complaints	
Seattle	46%	Seattle - Funneling the walk ons at the Seattle terminal is annoying and unnecessary. You've already got a headcount at the turnstiles.	
Bainbridge	21%	Seattle - In the winter, loading procedures changed to facilitate 'more accurate counts of passengers'. This has created so much turmoil with passengers being bottle necked back up through the terminal. This system is incredibly inefficient and unsatisfactory.	
Mukilteo	18%	Seattle - Takes a long time to load and unload passengers.	
Clinton	13%	Seattle - Ticket readers are outdated, and this new policy where the gate is halfway closed at Colman Dock seems more like security theater than anything with real impact. Only result is to further slow walking onto the ferry.	
Bremerton	10%	Bainbridge - Bainbridge terminal walk way is too narrow for the rush hour times.	
		Bainbridge - Bainbridge access to ferry by walking is far too long with no option for disabled or elderly. Should have an elevator directly up.	
		Mukilteo - The terminal is too small for the volume of walk-on passengers. There is no pedestrian bridge.	
		Clinton - The walk-ons in the winter time have to stand and wait in the cold. This is OK during the week because you load walk-ons first. However some genius has decided on weekends that cars get loaded first then walk-ons causing us to stand longer in the cold.	

Attribute Key Code - 7

Winter Opportunity Area – Passenger Loading Efficiency

Mukilteo/Clinton riders are the most dissatisfied with the efficiency of walk-on passenger loading procedures (17%). Among the 11% of riders overall who indicated that they were dissatisfied with passenger loading efficiency, a majority mentioned the Seattle (56%) terminal was where they experienced an unsatisfactory service level.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	PTT/ COU	MUK/ CLI	ANA/ SJI	INTER SJI
Respondents		1537	471	158	31	170	137	35	9	34	223	231	38
WSF walk-on passenger loading procedures are efficient	Imp. (4-5)	91%	93%	95%	89%	90%	91%	92%	63%	97%	90%	87%	72%
	Sat. (4-5)	68%	62%	64%	86%	86%	70%	58%	39%	91%	64%	70%	80%
	Dissat. (1-2)	11%	14%	14%	--	1%	8%	6%	--	5%	17%	8%	1%
2015	Dissat.	9%	12%	11%	4%	3%	9%	8%	--	--	10%	8%	--
Change	Dissat.	+2	+2	+3	-4	-2	-1	-2	--	+5	+7	--	+1

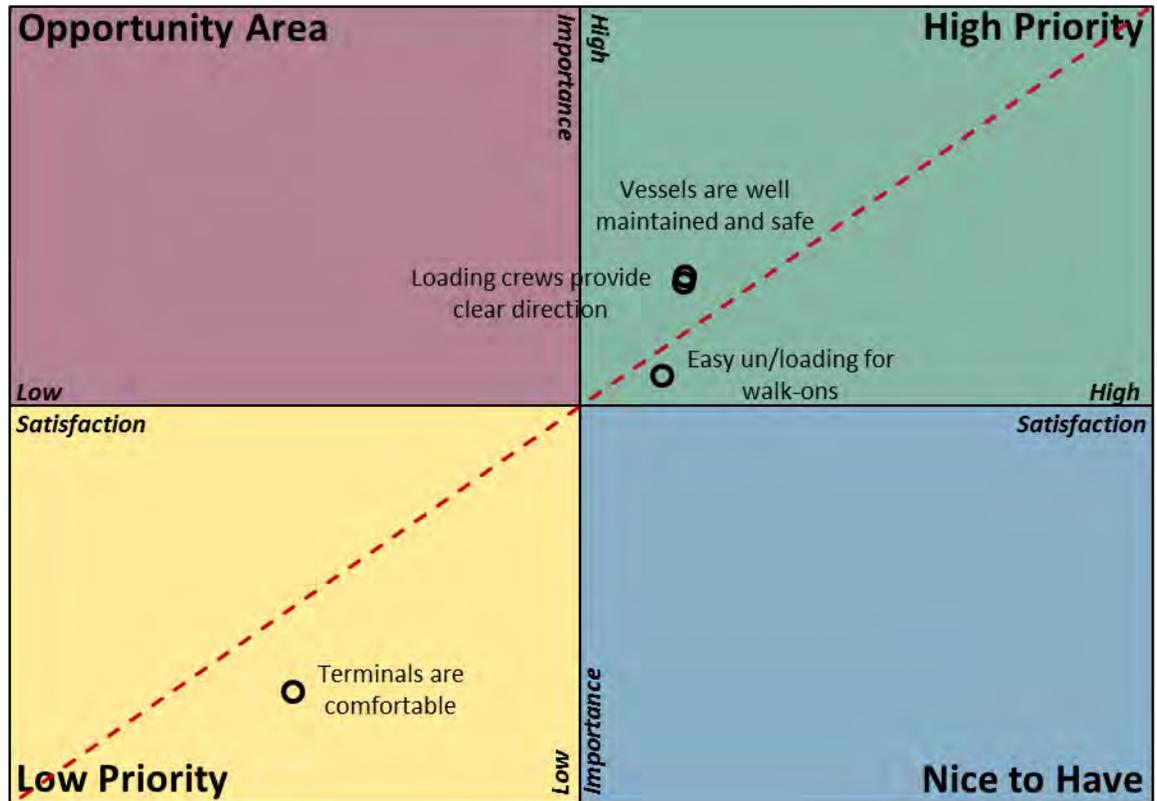
Top 5 Unsatisfactory Terminals	Example of Verbatim Complaints
Seattle 56%	Seattle - Because they close the gate halfway so we have to squeeze through which slows down loading. Why do crew members need to manually count the number of passengers loading when we've all just run our passes/Orca cards through the electronic turnstiles?
Mukilteo 18%	Seattle -Build a better system to count passengers. Funneling us into a single file is ridiculous. Change the turnstiles to count passengers, and compare that with a manual method, if required, but unless the ferry is VERY likely to be overloaded.
Bainbridge 17%	Seattle - Ingress blocked unnecessarily
Bremerton 14%	Mukilteo - Commuters are stacked up outside of turnstiles and then lines take a long time to get through when it is time to load walk-on passengers. This causes delays in ferry departures
Clinton 10%	Bainbridge - For the elderly and physically challenged people, the walk to the boat and especially the walk back to the terminal is difficult. The ramp is not wide enough to accommodate slower walkers or those with luggage, while others rush around them.
	Bremerton - There are a lot of line cutters that walk up the left side of the loading walkway to bypass the line of people waiting.

Attribute Key Code - 8

Summer Rider Satisfaction – FROG Panel

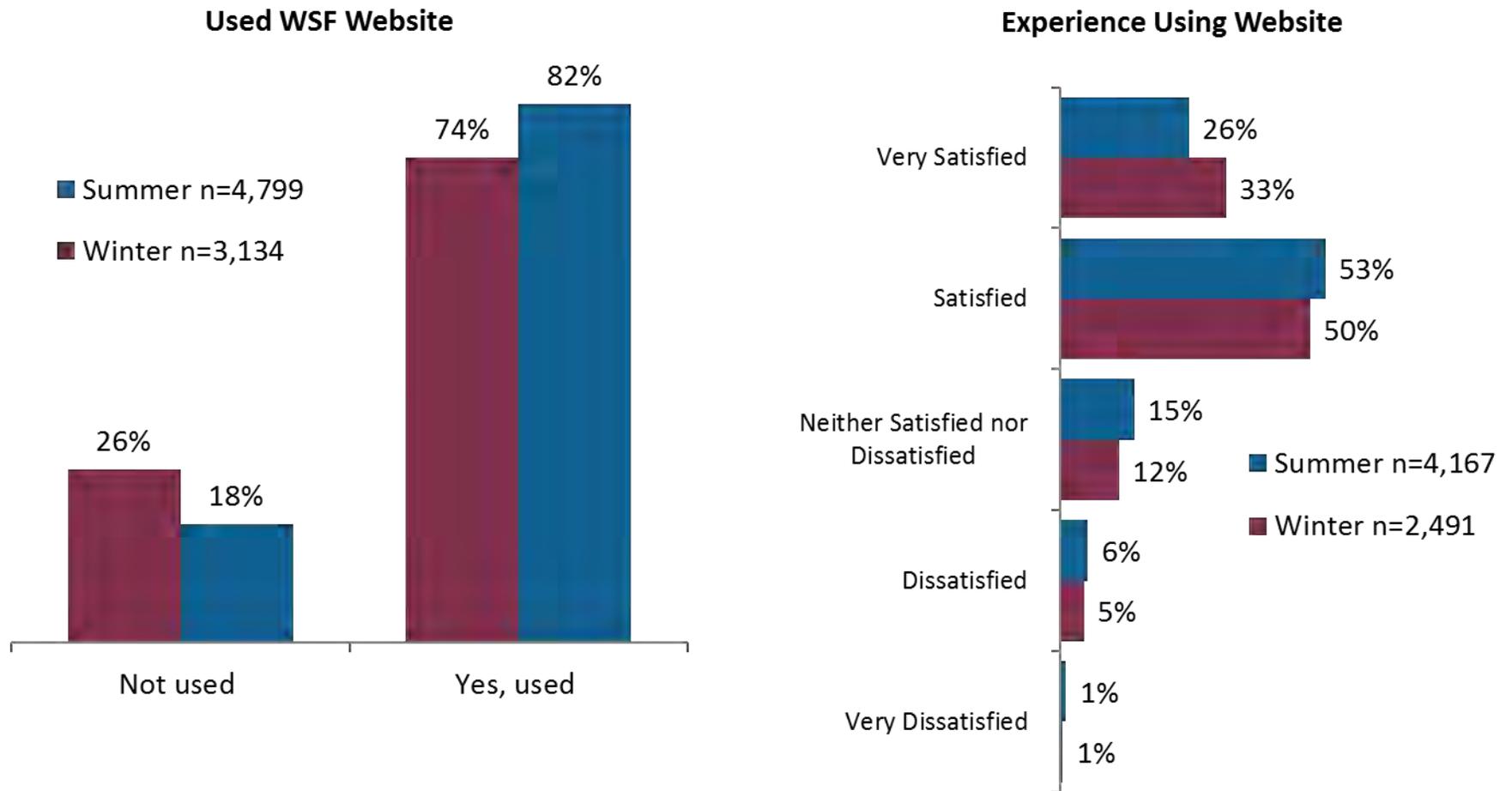
There is no clear opportunity area, but loading crews providing clear directions, vessels are well maintained and safe, and easy unloading and loading for walk-ons are the three highest priority attributes for summer respondents.

Satisfaction vs. Importance Ratings (n=2620 - 4535)



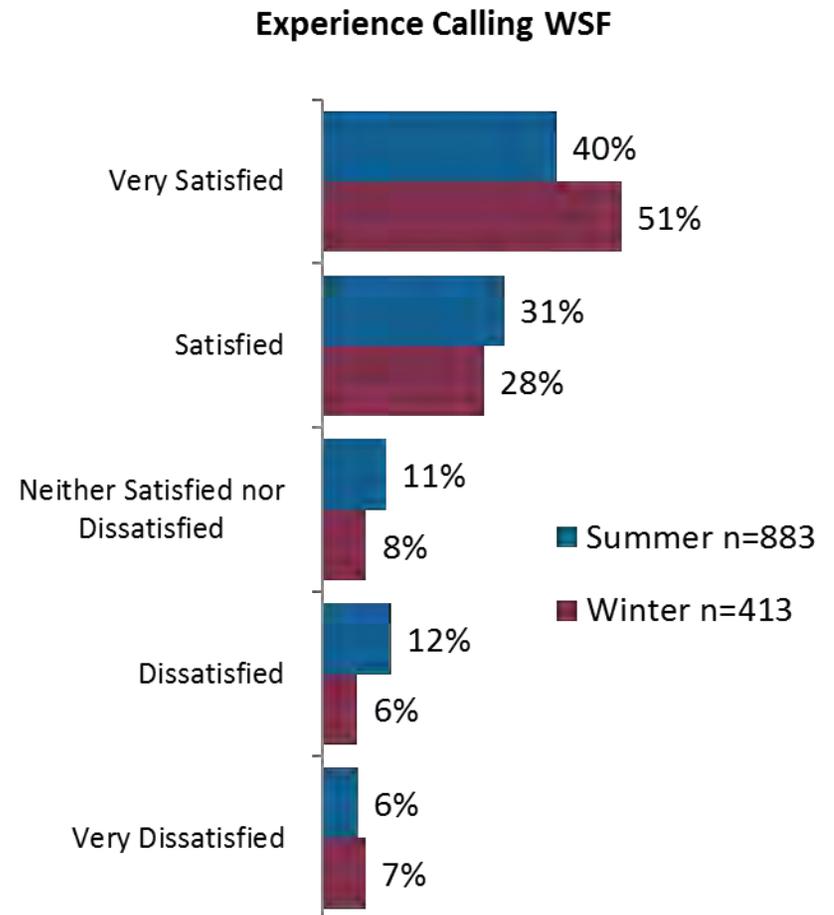
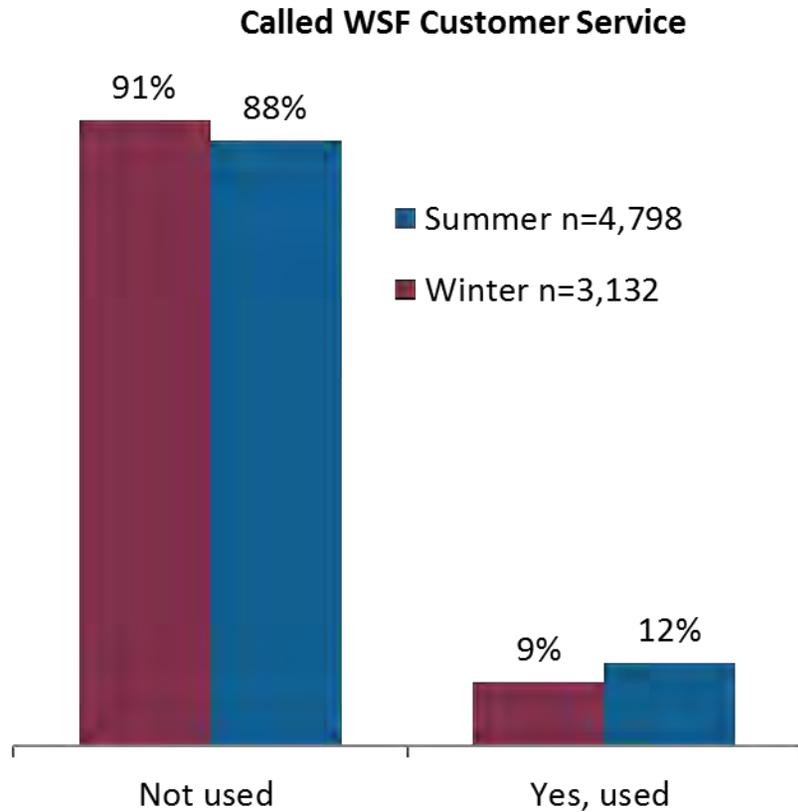
WSF Website – FROG Panel

Just less than three quarters of winter (74%) and more than three quarters of summer (82%) respondents have used the WSF website and most (78%+) are satisfied with their experience - fewer than 7% are dissatisfied.



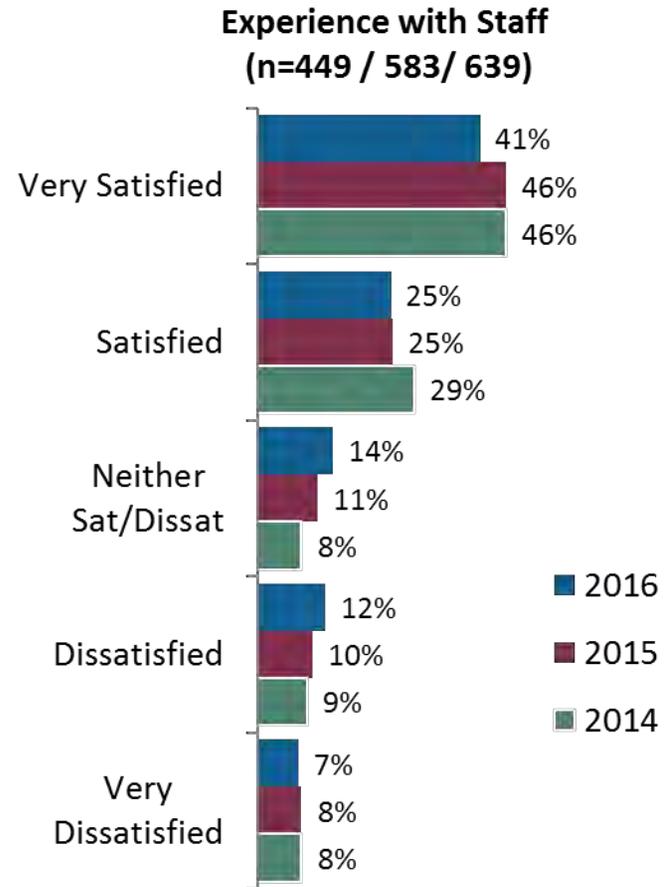
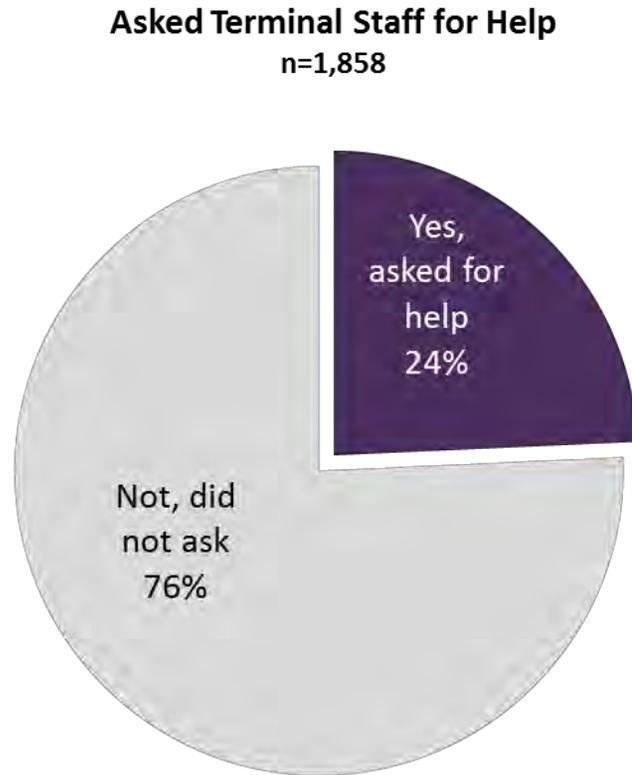
WSF Telephone Support – FROG Panel

Very few riders (12% or less) have contacted WSF customer service by phone during the winter/summer period. Of those who have contacted WSF telephone support, the majority are satisfied with their experience. Dissatisfaction was somewhat higher in summer than the winter (18% Dissatisfied vs. 13% Dissatisfied).



Terminal Staff - FROG Panel (Winter)

Among FROG Panel winter riders, only a quarter have interacted with terminal staff for assistance or help. Of those 24%, two-thirds (66%) had a positive experience, and only less than 20% were dissatisfied.



Summer Attribute Dissatisfaction by Route – FROG Panel

The following two pages detail the route-specific dissatisfaction ratings provided by respondents for each tested ferry attribute during the Summer Survey. For reference, the overall 2016 summer importance rating is also provided, to help better gauge WSF's performance relative to expectations.

In addition, more detailed information can be found in the technical reports for the Summer Riders Survey, included on the enclosed CD. The following data can be found by referencing the summer technical report files on the CD:

- ❖ Quadrant charts outlining relative importance and satisfaction of ferry attributes for riders of all routes
- ❖ Importance, satisfaction and dissatisfaction ratings for riders of each route for each tested ferry attribute
- ❖ Terminals or vessels receiving the most dissatisfaction ratings for each tested ferry attribute
- ❖ Example verbatim comments from riders explaining reasons for their dissatisfaction with each particular tested ferry attribute

Dissatisfaction has increased for almost all attributes for Seattle/ Bremerton and Point Defiance/ Tahlequah – with the exception of loading crews providing clear directions and hand signals. Riders along Seattle/ Bainbridge route have increased levels of dissatisfaction concerning terminal comfort and the ease of loading/unloading for walk-ons compared to 2014.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	SUMMER Importance 2016	SUMMER Dissatisfaction					
		SEA/ BAIN		SEA/ BREM		PTD/TAH	
		2016	2014	2016	2014	2016	2014
Terminals are comfortable	65%	24%	23%	25%	18%	9%	3%
WSF provides easy loading and unloading for walk-ons	89%	21%	16%	16%	14%	10%	5%
WSF loading crews provide clear directions/hand signals	94%	9%	11%	8%	10%	20%	23%
WSF Vessels are well maintained and safe	94%	12%	14%	26%	23%	8%	5%

Among Edmonds/ Kingston riders, dissatisfaction increased slightly for 2 of the 4 attributes. Dissatisfaction decreased across all attributes for Fauntleroy/ Vashon riders. The dissatisfaction levels among the Fauntleroy/ Southworth route decreased – with the exception of the ease of loading/unloading for walk-ons.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	SUMMER Importance 2016	SUMMER Dissatisfaction					
		EDM/KIN		FAU/VAS		FAU/SOU	
		2016	2014	2016	2014	2016	2014
Terminals are comfortable	65%	9%	13%	8%	11%	4%	14%
WSF provides easy loading and unloading for walk-ons	89%	6%	5%	7%	8%	10%	8%
WSF loading crews provide clear directions/hand signals	94%	8%	12%	17%	26%	15%	21%
WSF Vessels are well maintained and safe	94%	12%	8%	3%	8%	4%	14%

Southworth/ Vashon saw a drastic decrease in dissatisfaction levels among 3 of the 4 attributes. Pt. Townsend/ Coupeville and Mukilteo/ Clinton riders' dissatisfaction levels are largely unchanged.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	SUMMER Importance 2016	SUMMER Dissatisfaction					
		SOU/VAS		PTT/COU		MUK/CLI	
		2016	2014	2016	2014	2016	2014
Terminals are comfortable	65%	4%	14%	6%	10%	7%	10%
WSF provides easy loading and unloading for walk-ons	89%	0%	9%	5%	5%	15%	15%
WSF loading crews provide clear directions/hand signals	94%	6%	18%	9%	9%	14%	16%
WSF Vessels are well maintained and safe	94%	7%	7%	5%	6%	4%	6%

Dissatisfaction decreased on all 4 attributes for Anacortes/ San Juan Inland and San Juan Interisland riders – drastically so in many cases. The Anacortes/ Sidney B.C. saw a large increase in dissatisfaction for the comfort of terminals, but a drastic decrease in dissatisfaction levels concerning the maintenance and safety of WSF vessels.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	SUMMER Importance 2016	SUMMER Dissatisfaction					
		ANA/SJI		SJII		ANA/BC	
		2016	2014	2016	2014	2016	2014
Terminals are comfortable	65%	24%	26%	5%	27%	14%	3%
WSF provides easy loading and unloading for walk-ons	89%	8%	10%	5%	12%	4%	5%
WSF loading crews provide clear directions/hand signals	94%	13%	24%	22%	27%	2%	3%
WSF Vessels are well maintained and safe	94%	15%	24%	10%	31%	10%	34%

Winter Attribute Dissatisfaction by Route – FROG Panel

The following four pages detail the route-specific dissatisfaction ratings for each tested ferry attribute for the Winter Rider Survey. For reference, the overall 2016 winter importance rating is also provided, to help better gauge WSF's performance relative to expectations.

In addition, more detailed information can be found in the technical reports for the Winter Customer Survey, included on the enclosed CD. The following data can be found by referencing the winter technical report files on the CD:

- ❖ Quadrant charts outlining relative importance and satisfaction of ferry attributes for riders of all routes
- ❖ Importance, satisfaction and dissatisfaction ratings for riders of each route for each tested ferry attribute
- ❖ Terminals or vessels receiving the most dissatisfaction ratings for each tested ferry attribute
- ❖ Example verbatim comments from riders explaining reasons for their dissatisfaction with each particular tested ferry attribute

Dissatisfaction among Seattle/Bainbridge riders has increased for passenger loading procedures (14%) compared to 2014 (9%). Seattle/Bremerton and Point Defiance/Tahlequah riders' dissatisfaction levels have generally increased since 2014.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	WINTER Importance 2016	WINTER Dissatisfaction					
		SEA/ BAIN		SEA/ BREM		PTD/TAH	
		2016	2014	2016	2014	2016	2014
Terminals are clean and well maintained	92%	11%	12%	13%	9%	3%	0%
Terminals are comfortable	82%	21%	24%	20%	15%	15%	15%
Terminal Staff is helpful, competent and knowledgeable	87%	9%	10%	14%	10%	5%	6%
The bathrooms in the terminals are clean and well maintained	94%	29%	32%	34%	28%	20%	12%
WSF and Transit schedules coordinated	70%	14%	12%	17%	13%	19%	23%
Adequate parking near terminals	78%	21%	20%	25%	19%	40%	27%
Easy loading and unloading for walk-on	92%	13%	13%	10%	8%	0%	0%
Passenger loading procedures are efficient	91%	14%	9%	14%	11%	0%	2%
Passenger unloading procedures are efficient	90%	12%	11%	11%	9%	0%	0%
Toll booth staff is friendly, courteous and polite	91%	4%	5%	2%	3%	3%	0%
WSF makes buying tickets easy and quick	95%	4%	5%	3%	3%	14%	7%
Efficiently processes vehicles through ticket lanes	96%	10%	11%	5%	10%	17%	9%
WSF vehicle loading crew is friendly, courteous and polite	88%	5%	8%	8%	7%	10%	5%
Loading procedures are efficient	95%	6%	5%	3%	8%	16%	10%
Loads ferries to capacity with little room between cars	88%	6%	6%	5%	3%	7%	4%
Loading crews provide clear directions and/or hand signals	95%	8%	8%	12%	9%	18%	11%
Unloading crew is friendly, courteous and polite	87%	2%	2%	4%	4%	4%	1%
Unloading procedures are efficient	94%	9%	7%	6%	7%	4%	9%
Unloading crews provide clear directions and/or hand signals	94%	3%	2%	4%	3%	4%	4%
Passenger seating areas are clean and comfortable	96%	6%	5%	17%	14%	2%	1%
Bathrooms on the ferries are clean and well maintained	96%	9%	8%	16%	19%	7%	0%
Vessels are well maintained and safe	96%	8%	8%	16%	16%	2%	0%
Vessel crew is friendly, courteous and polite	96%	3%	2%	9%	7%	3%	0%
Vessel crew is helpful, competent and knowledgeable	97%	3%	3%	3%	7%	0%	0%

Among Edmonds/Kingston 31% are now dissatisfied with parking near terminals compared to 20% in 2014. Among Fautleroy/Southworth riders, dissatisfaction levels have generally increased since 2014.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	WINTER Importance 2016	WINTER Dissatisfaction					
		EDM/KIN		FAU/VAS		FAU/SOU	
		2016	2014	2016	2014	2016	2014
Terminals are clean and well maintained	92%	3%	3%	2%	1%	2%	2%
Terminals are comfortable	82%	14%	14%	13%	9%	15%	10%
Terminal Staff is helpful, competent and knowledgeable	87%	5%	7%	6%	8%	12%	8%
The bathrooms in the terminals are clean and well maintained	94%	13%	15%	6%	5%	2%	11%
WSF and Transit schedules coordinated	70%	13%	15%	19%	20%	21%	22%
Adequate parking near terminals	78%	31%	20%	45%	46%	33%	27%
Easy loading and unloading for walk-on	92%	6%	8%	5%	5%	13%	6%
Passenger loading procedures are efficient	91%	1%	4%	8%	7%	6%	6%
Passenger unloading procedures are efficient	90%	3%	3%	4%	7%	6%	8%
Toll booth staff is friendly, courteous and polite	91%	2%	3%	5%	5%	6%	5%
WSF makes buying tickets easy and quick	95%	3%	4%	15%	14%	10%	4%
Efficiently processes vehicles through ticket lanes	96%	6%	8%	31%	32%	18%	9%
WSF vehicle loading crew is friendly, courteous and polite	88%	5%	9%	7%	9%	13%	4%
Loading procedures are efficient	95%	6%	9%	14%	14%	18%	10%
Loads ferries to capacity with little room between cars	88%	4%	5%	18%	12%	17%	11%
Loading crews provide clear directions and/or hand signals	95%	12%	11%	20%	18%	25%	15%
Unloading crew is friendly, courteous and polite	87%	3%	3%	3%	3%	10%	1%
Unloading procedures are efficient	94%	6%	5%	7%	9%	16%	4%
Unloading crews provide clear directions and/or hand signals	94%	3%	4%	7%	4%	11%	0%
Passenger seating areas are clean and comfortable	96%	3%	3%	2%	1%	4%	4%
Bathrooms on the ferries are clean and well maintained	96%	9%	7%	1%	3%	5%	6%
Vessels are well maintained and safe	96%	6%	6%	5%	4%	11%	3%
Vessel crew is friendly, courteous and polite	96%	2%	5%	5%	5%	2%	6%
Vessel crew is helpful, competent and knowledgeable	97%	4%	3%	7%	6%	5%	5%

Southworth/Vashon riders show a large increase in dissatisfaction for many of the tested attributes. Among Pt. Townsend/ Coupeville riders are much more dissatisfied with the cleanliness and maintenance of terminal bathrooms (17%) than in 2014 (4%). Mukilteo/ Clinton riders show a large increase in dissatisfaction for adequate parking.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	WINTER Importance 2016	WINTER Dissatisfaction					
		SOU/VAS		PTT/COU		MUK/CLI	
		2016	2014	2016	2014	2016	2014
Terminals are clean and well maintained	92%	11%	6%	2%	0%	2%	4%
Terminals are comfortable	82%	43%	6%	6%	3%	6%	8%
Terminal Staff is helpful, competent and knowledgeable	87%	11%	0%	4%	1%	6%	8%
The bathrooms in the terminals are clean and well maintained	94%	0%	6%	17%	4%	10%	8%
WSF and Transit schedules coordinated	70%	27%	13%	2%	12%	12%	9%
Adequate parking near terminals	78%	27%	6%	17%	20%	58%	47%
Easy loading and unloading for walk-on	92%	14%	0%	7%	0%	19%	14%
Passenger loading procedures are efficient	91%	0%	0%	5%	2%	17%	12%
Passenger unloading procedures are efficient	90%	14%	7%	7%	0%	12%	10%
Toll booth staff is friendly, courteous and polite	91%	0%	6%	7%	4%	2%	3%
WSF makes buying tickets easy and quick	95%	9%	0%	10%	6%	3%	5%
Efficiently processes vehicles through ticket lanes	96%	41%	6%	5%	7%	6%	7%
WSF vehicle loading crew is friendly, courteous and polite	88%	12%	6%	9%	7%	5%	10%
Loading procedures are efficient	95%	29%	6%	6%	6%	9%	9%
Loads ferries to capacity with little room between cars	88%	12%	0%	10%	2%	11%	11%
Loading crews provide clear directions and/or hand signals	95%	47%	11%	9%	11%	18%	19%
Unloading crew is friendly, courteous and polite	87%	9%	0%	5%	4%	2%	5%
Unloading procedures are efficient	94%	21%	0%	4%	6%	6%	6%
Unloading crews provide clear directions and/or hand signals	94%	38%	6%	5%	6%	6%	6%
Passenger seating areas are clean and comfortable	96%	0%	0%	4%	0%	2%	2%
Bathrooms on the ferries are clean and well maintained	96%	11%	0%	12%	2%	4%	8%
Vessels are well maintained and safe	96%	22%	5%	2%	3%	6%	6%
Vessel crew is friendly, courteous and polite	96%	0%	0%	4%	8%	3%	5%
Vessel crew is helpful, competent and knowledgeable	97%	0%	10%	4%	6%	2%	4%

Anacortes/San Juan Island riders have mixed feelings about ferry attributes along this route; dissatisfaction rates increased regarding the coordination of WSF and transit schedules, but have dropped concerning the maintenance and safety of vessels. San Juan Interisland riders generally have lower levels of dissatisfaction than Anacortes/San Juan riders. However, there was an increased level of dissatisfaction concerning the comfort of terminals for San Juan Interisland riders.

Satisfaction on a 5-pt. Scale (1=low; 5=high)	WINTER Importance 2016	WINTER Dissatisfaction			
		ANA/SJI		SJII	
		2016	2014	2016	2014
Terminals are clean and well maintained	92%	9%	11%	5%	25%
Terminals are comfortable	82%	24%	16%	24%	17%
Terminal Staff is helpful, competent and knowledgeable	87%	7%	9%	0%	0%
The bathrooms in the terminals are clean and well maintained	94%	14%	17%	16%	8%
WSF and Transit schedules coordinated	70%	35%	26%	23%	30%
Adequate parking near terminals	78%	15%	12%	18%	20%
Easy loading and unloading for walk-on	92%	13%	9%	11%	20%
Passenger loading procedures are efficient	91%	8%	7%	1%	20%
Passenger unloading procedures are efficient	90%	7%	8%	0%	10%
Toll booth staff is friendly, courteous and polite	91%	4%	3%	2%	5%
WSF makes buying tickets easy and quick	95%	5%	3%	3%	0%
Efficiently processes vehicles through ticket lanes	96%	18%	10%	13%	10%
WSF vehicle loading crew is friendly, courteous and polite	88%	11%	13%	4%	10%
Loading procedures are efficient	95%	15%	17%	12%	19%
Loads ferries to capacity with little room between cars	88%	11%	8%	11%	5%
Loading crews provide clear directions and/or hand signals	95%	18%	18%	16%	29%
Unloading crew is friendly, courteous and polite	87%	5%	5%	2%	0%
Unloading procedures are efficient	94%	7%	9%	5%	5%
Unloading crews provide clear directions and/or hand signals	94%	6%	6%	3%	10%
Passenger seating areas are clean and comfortable	96%	6%	9%	2%	5%
Bathrooms on the ferries are clean and well maintained	96%	8%	12%	4%	10%
Vessels are well maintained and safe	96%	13%	23%	10%	33%
Vessel crew is friendly, courteous and polite	96%	5%	6%	0%	0%
Vessel crew is helpful, competent and knowledgeable	97%	4%	5%	0%	0%

WSF Fare & Funding Policy Issues

WSF Fare & Funding Policy Issues – Summary

Contains information regarding:

- ❖ Fare Issues
- ❖ Capital Funding Issues
- ❖ Importance of WSF to State
- ❖ Rates of Driving On

Information gathered from the following survey*:

Summer Rider Survey

F.R.O.G. panel and Onboard riders

General Public Survey

V.O.W.S. panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

A large majority of resident's statewide say that daily WSF operations should be funded using a mix of fares and taxes.

By contrast, among the general public, 46% of non-Puget Sound residents and 50% of Puget Sound residents think fares should be raised to cover more of WSF's operating costs

The general public is divided when it comes to who should pay for capital investments (Everyone – 30%, PS Residents – 36%, Ferry Riders – 27%).

Increasing the gas tax (29%) and establishing a new statewide tax dedicated to ferry funding are the top suggestion from summer riders for funding WSF capital needs.

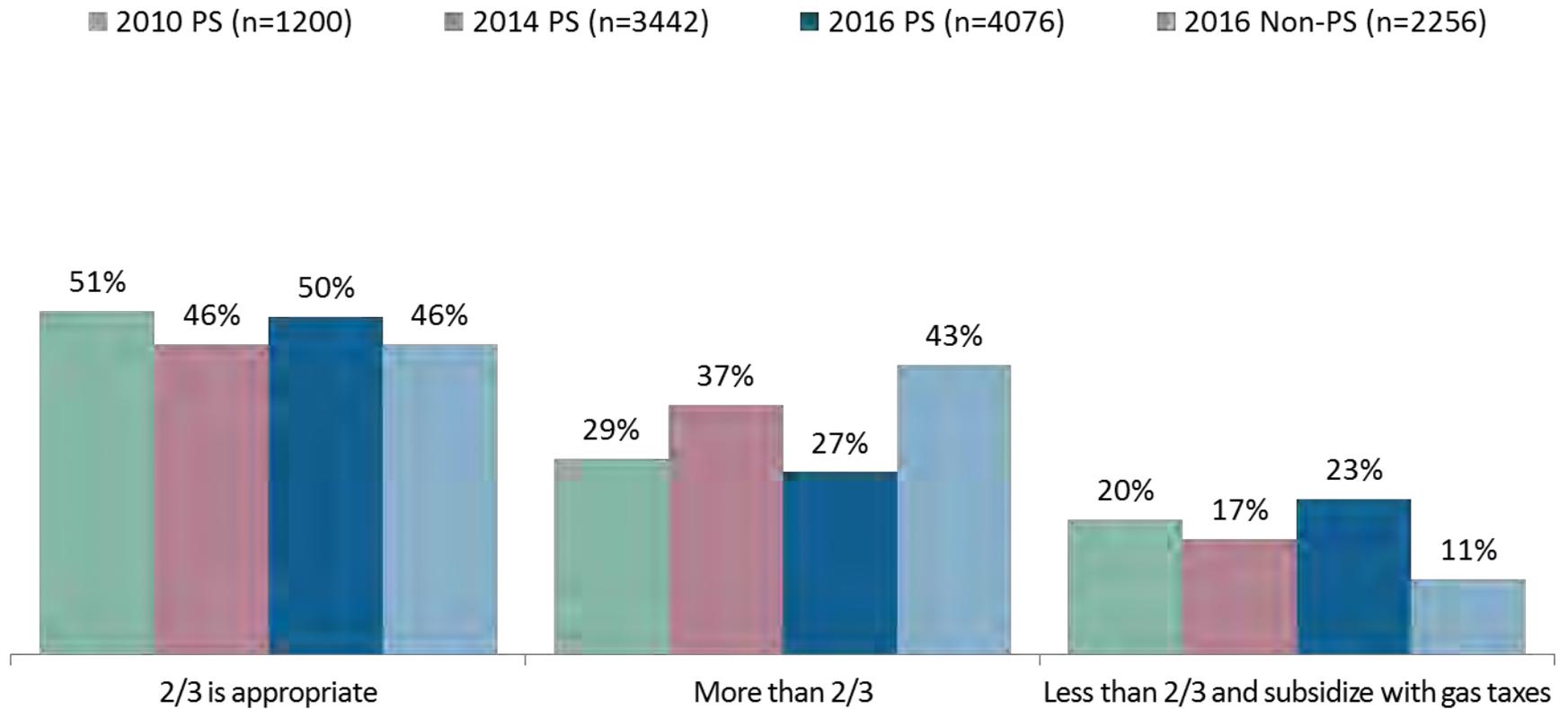
Most residents – including those outside Puget Sound - agree that WSF is important to the general Puget Sound economy, growth and tourism.

There has been a very slight decline in the number of passengers driving on.

Increasing Fares – VOWS Panel

Over four in ten (43%) Non-Puget Sound residents feel riders should pay more than 2/3 of the daily operating costs. More Puget Sound residents in 2016 (23%) feel riders should pay less than 2/3 of the daily operating costs than did in 2010 (17%).

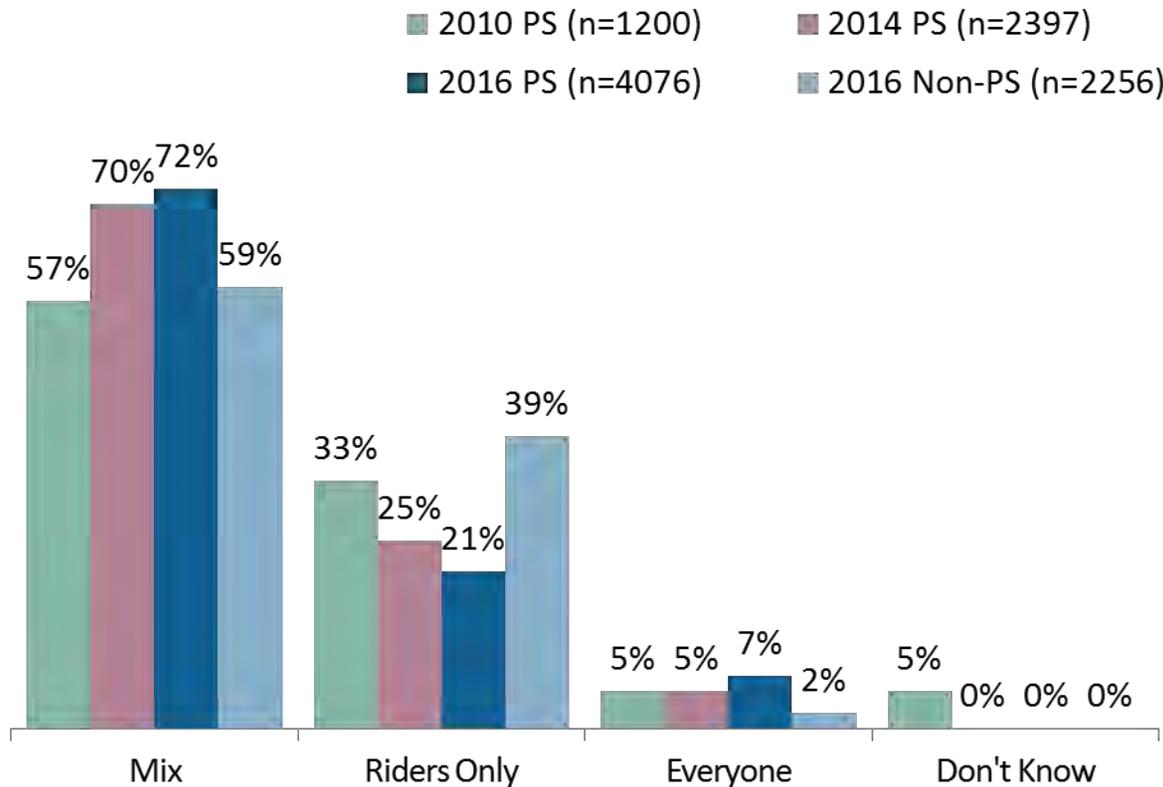
How Much Should Fares Cover of Annual Operating Costs (2010-2016)



Funding Daily Operations – VOWS Panel

The percentage of Puget Sound residents who feel that daily operations should be paid for by a mix of fares and general gas taxes has increased slightly from 70% in 2014 to 72% in 2016. Non-PS residents are more likely (39%) to say “riders only” should pay than their Puget Sound counterparts (21%). Statewide, sixty-seven percent (67%) of the general public say daily operations should be paid for by a mix of fares and taxes and on average they believe riders should pay more than half (61.2%) of the operating costs. In general, the more likely a respondent is to use the ferries, the lower the percentage of operating costs they think riders should pay.

How WSF Daily Operations Should Be Funded (2010 – 2016)



Statewide:

“Mix of fares and taxes” 67%

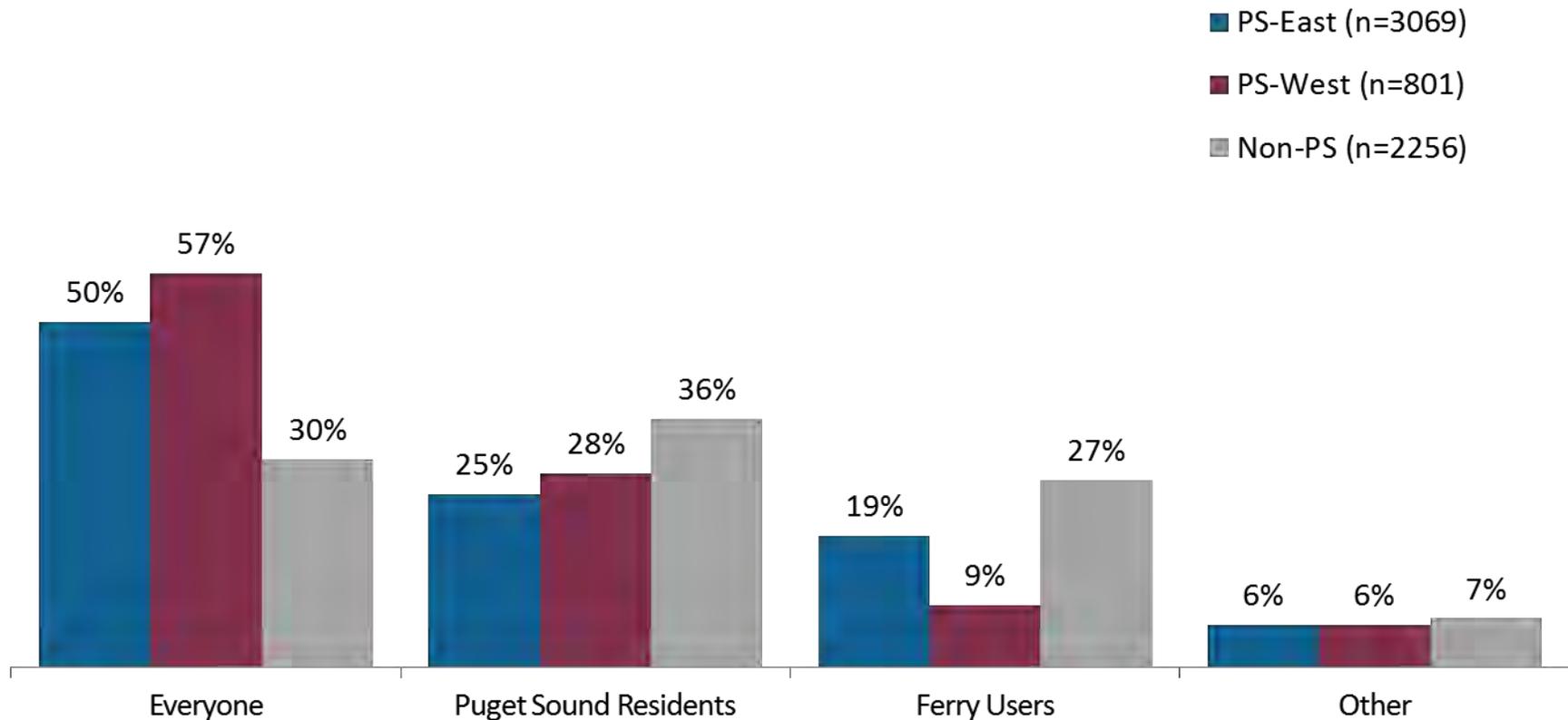
In 2016 those that said “mix” suggested ferry riders should pay on average **61.2%** of WSF’s daily operating costs.

Statewide	61.2%
Puget Sound	56.7%
Non-Puget Sound	68.4%
Puget Sound Eastside	57.7%
Puget Sound Westside	47.3%
Island residents	33.3%

Capital Funding – VOWS Panel

Non-Puget Sound residents are divided roughly in thirds when it comes to who should pay for capital investments (Everyone – 30%, Puget Sound (PS) Residents – 36%, Ferry Riders – 27%) but lean towards PS residents paying. Westside PS residents are significantly more likely to say “everybody” should pay for capital improvements (57%) compared to Eastside PS (50%) and non-Puget Sound Basin (30%) residents.

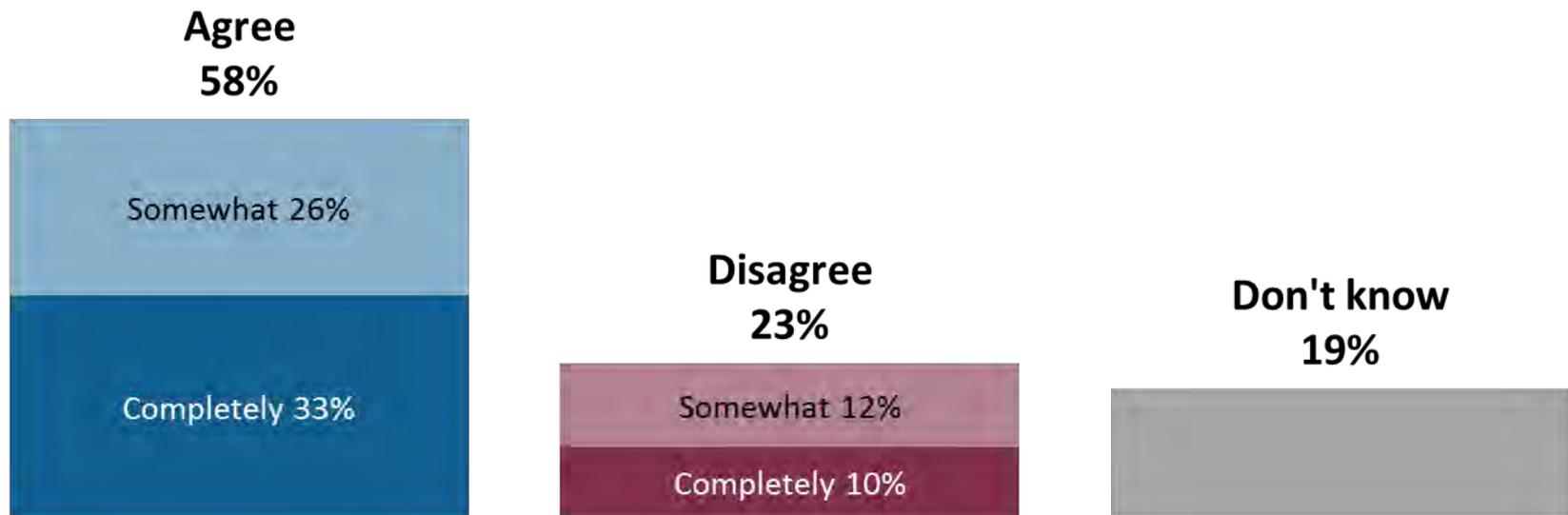
Who should pay for capital investments? (2016)



Need to Enlarge/Redesign Terminals – FROG Panel (Summer)

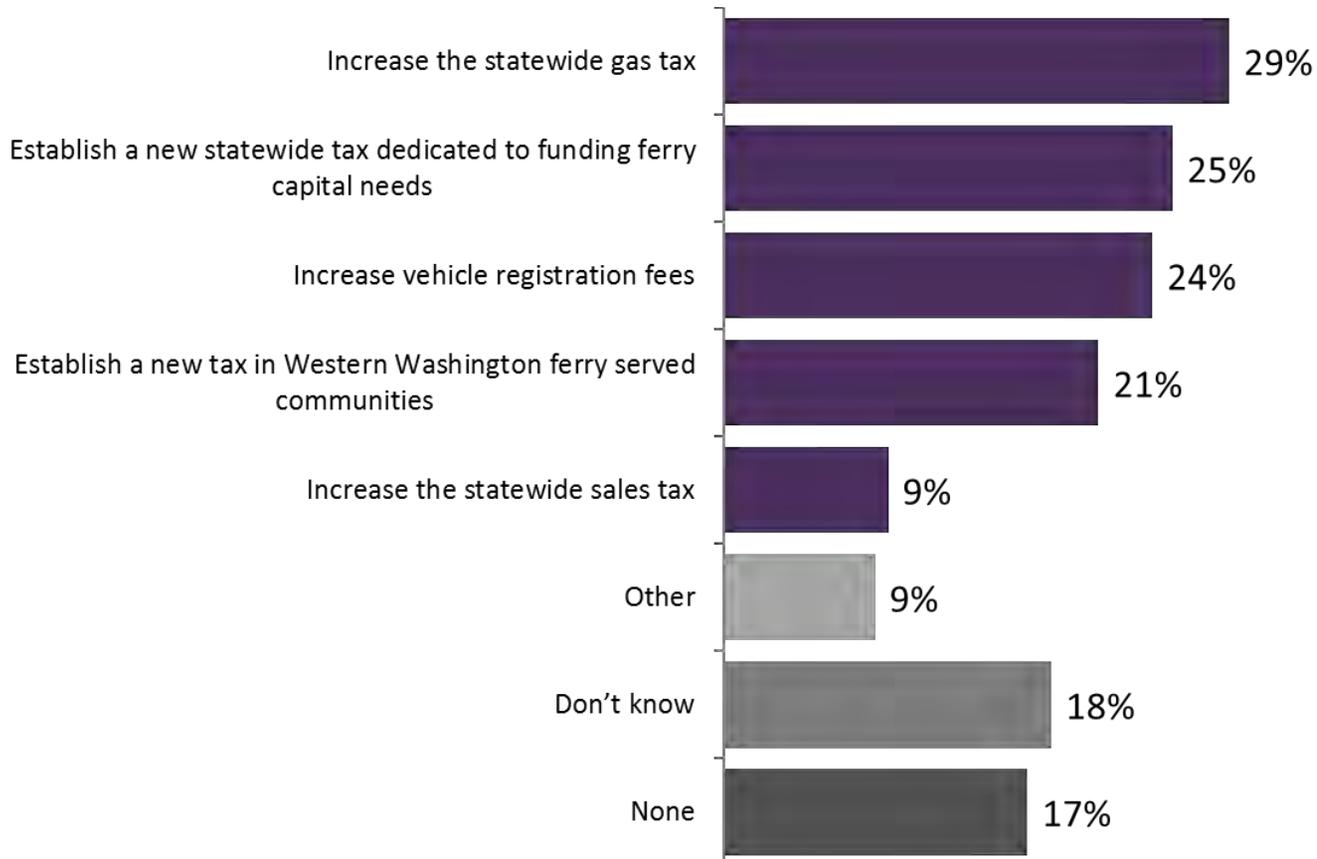
58% of respondents agree that some ferry terminals need to be enlarged and/or redesigned to provide more efficient service. Seattle, Mukilteo, and Bainbridge are the most frequently mentioned ferry terminals that need to be enlarged and/or redesigned.

“There are ferry terminals that need to be enlarged and/or redesigned to provide more efficient service.”



Suggested Funding Methods – FROG Panel (Summer)

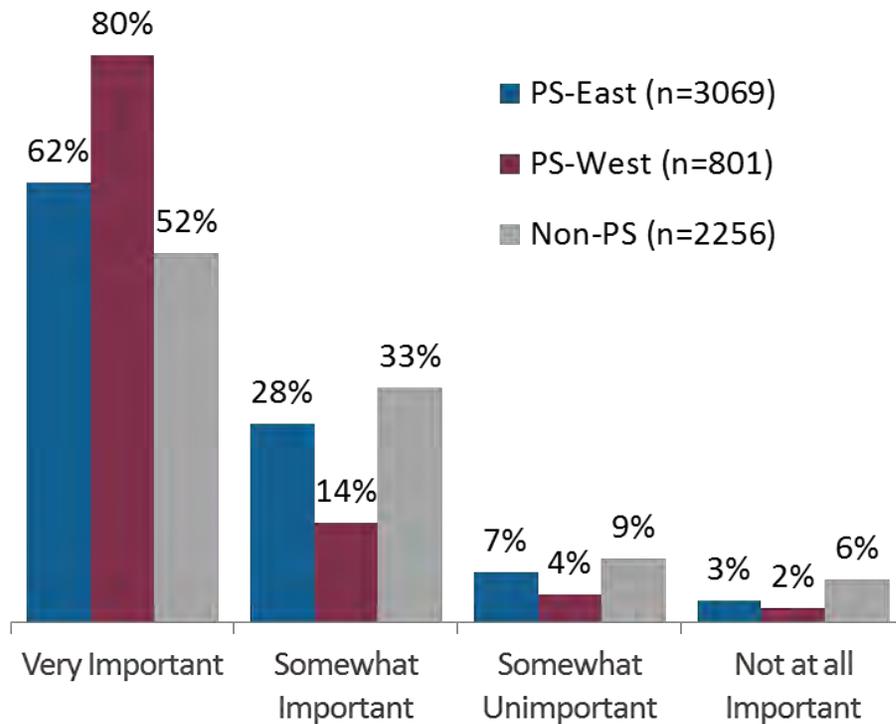
Increasing the statewide gas tax along with establishing a new statewide tax dedicated to funding ferry capital needs were the methods of funding capital needs most recommended by summer riders.



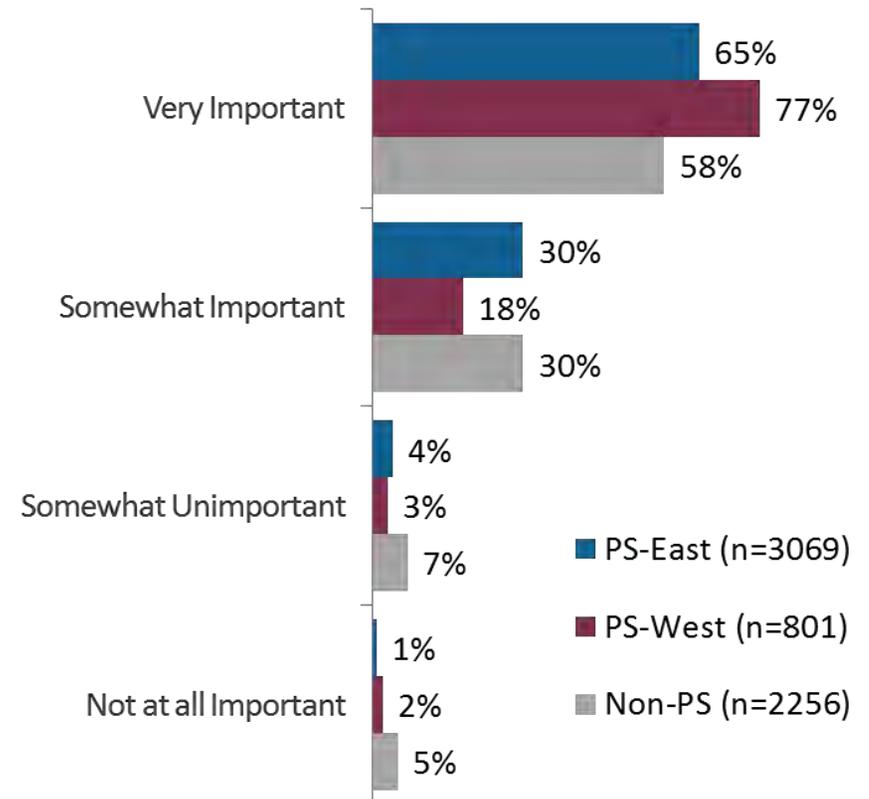
WSF Importance – VOWS Panel

Most residents statewide believe that WSF is important to the general Puget Sound economy and growth and is important to encouraging tourism in the Puget Sound. Even outside Puget Sound, a majority think WSF is very important to the Puget Sound economy (52%) and to encouraging tourism (58%).

Importance of WSF to Economy and Growth of the PS Basin (2016)

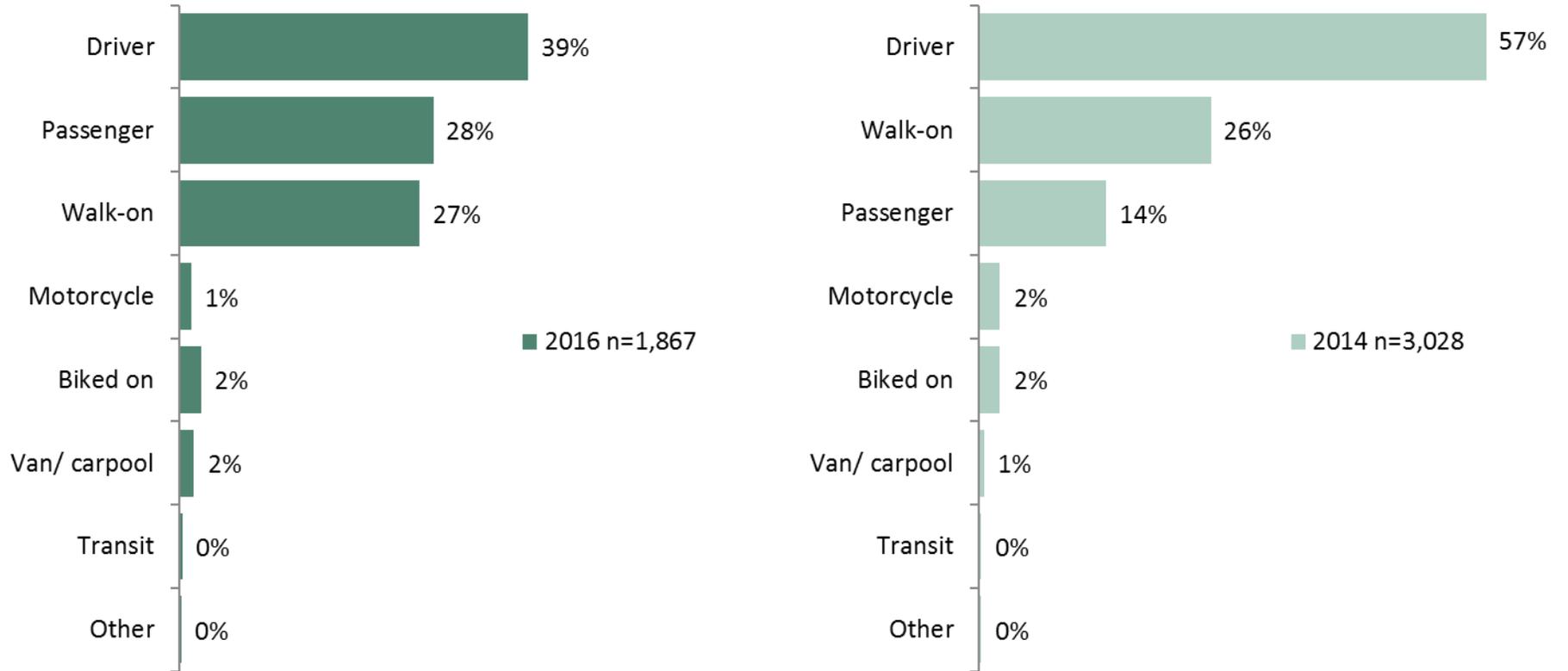


Importance of WSF to Encouraging Tourism in PS Basin (2016)



Walk and Bike Boarding – FROG Panel (Summer)

The percentage of riders driving on in a vehicle has declined slightly from 2014 (71%) to 67% in 2016.



*General Public (VOWS) Ferry Usage
& Attitudes Towards WSF*

General Public (VOWS) Ferry Usage & Attitudes towards WSF – Summary

Contains information regarding:

- ❖ GP WSF ridership and frequency
- ❖ GP Trip purpose
- ❖ GP Travel change

Information gathered from the following survey*:

General Public Survey
V.O.W.S. panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Over half (56%) of residents living in West Puget Sound use the ferries at least once a month and four-in-five (80%) use the ferries at least every 3 months. By contrast, just less than half (48%) of East Puget Sound residents use the ferries once a year or less and almost four-in-five (84%) of 2016 residents outside Puget Sound use the ferries less than once a year.

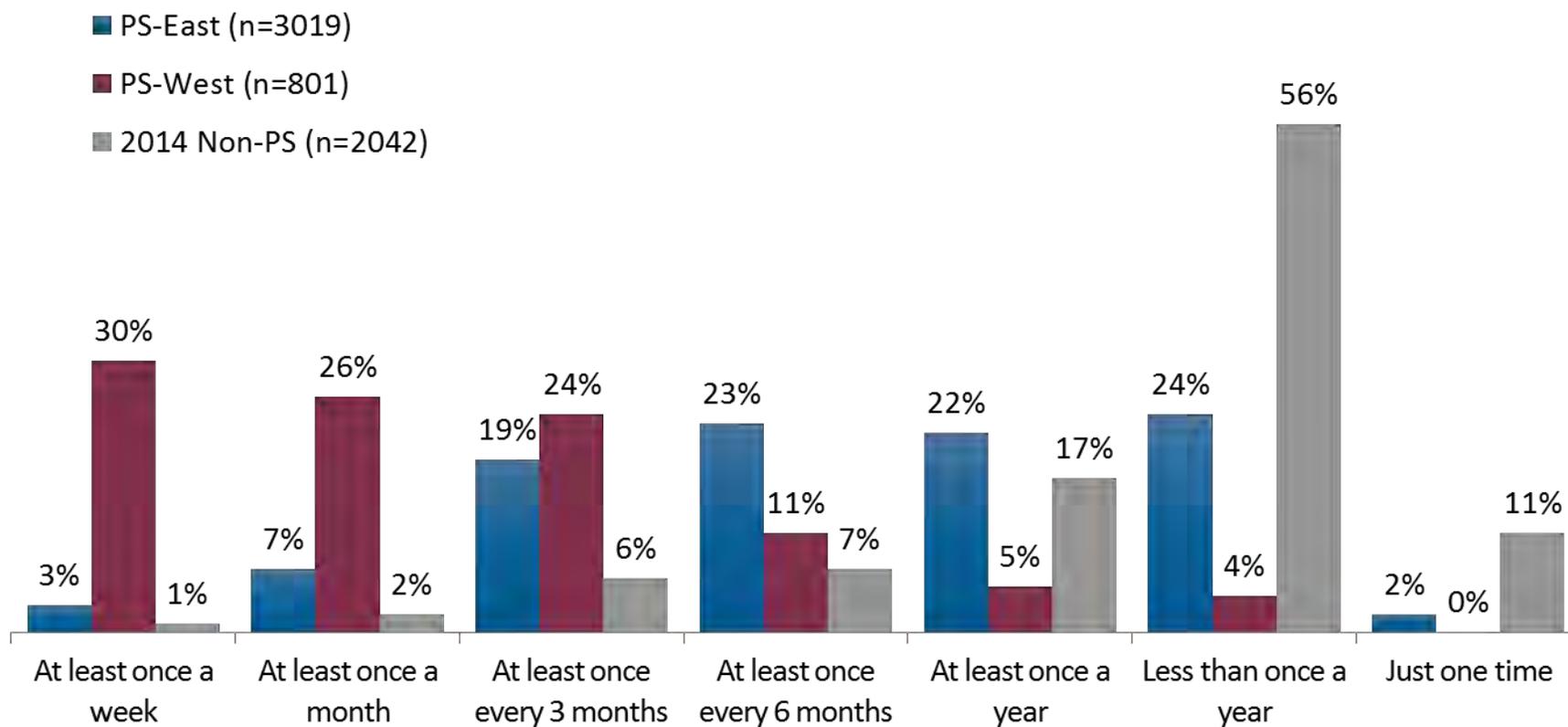
Three-quarters (74%) of Puget Sound residents have used WSF in the last year, while over half (59%) of residents outside Puget Sound have NOT used WSF in the last year.

Residents living on the Westside of Puget Sound use the ferries for a wide range of activities. Residents on the Eastside of Puget Sound (47%) and residents outside of Puget Sound (54%) primarily use the ferries for recreational purposes.

Travel Frequency – VOWS Panel

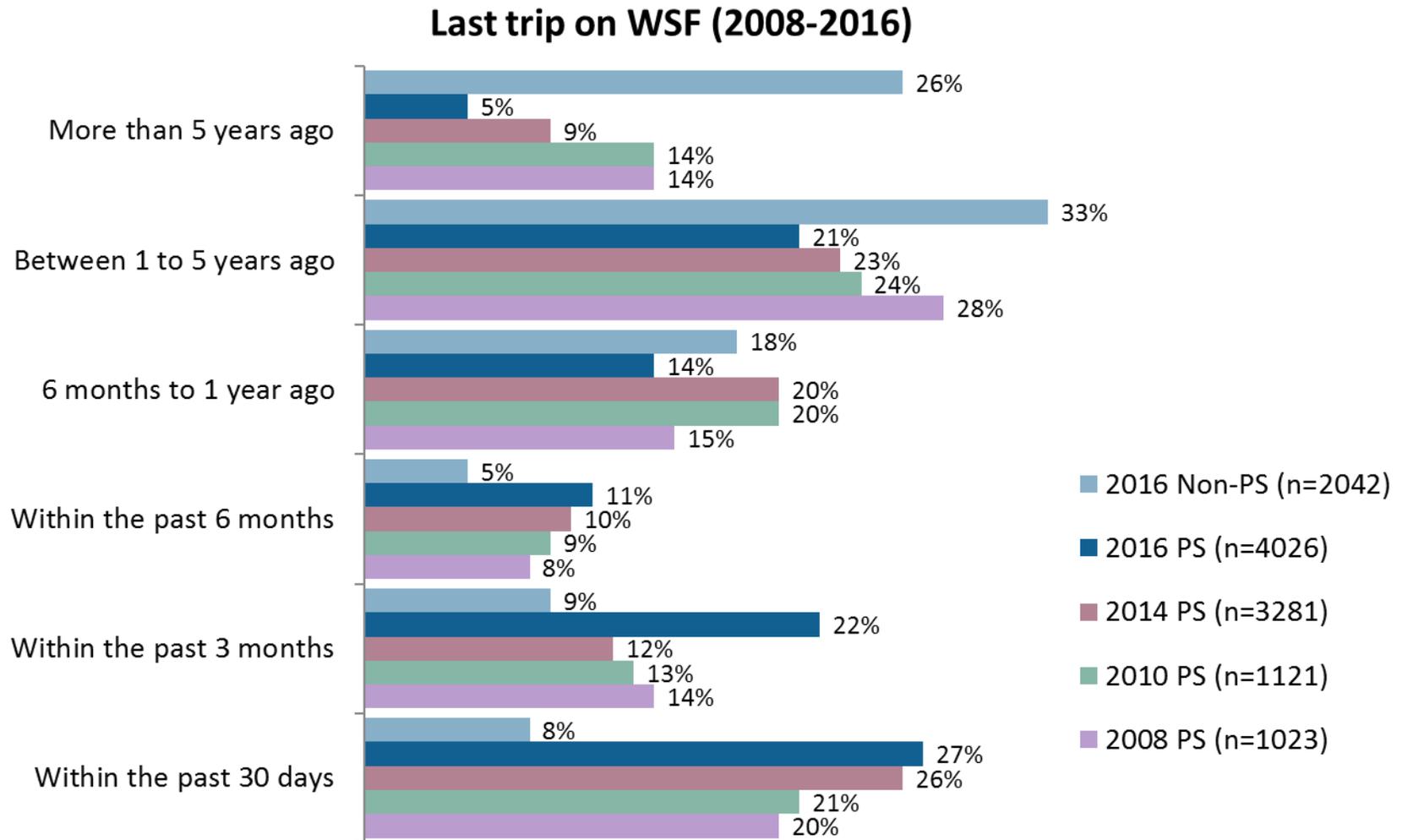
Over half (56%) of residents living in Westside communities in the Puget Sound use the ferries at least once a month and four-in-five (80%) use the ferries at least every 3 months. By contrast, just less than half (48%) of residents living in the Eastside Puget Sound communities use the ferries once a year or less and approximately four-in-five (84%) of 2014 residents outside Puget Sound use the ferries less than once a year.

Travel Frequency (2016)



Last Trip – VOWS Panel

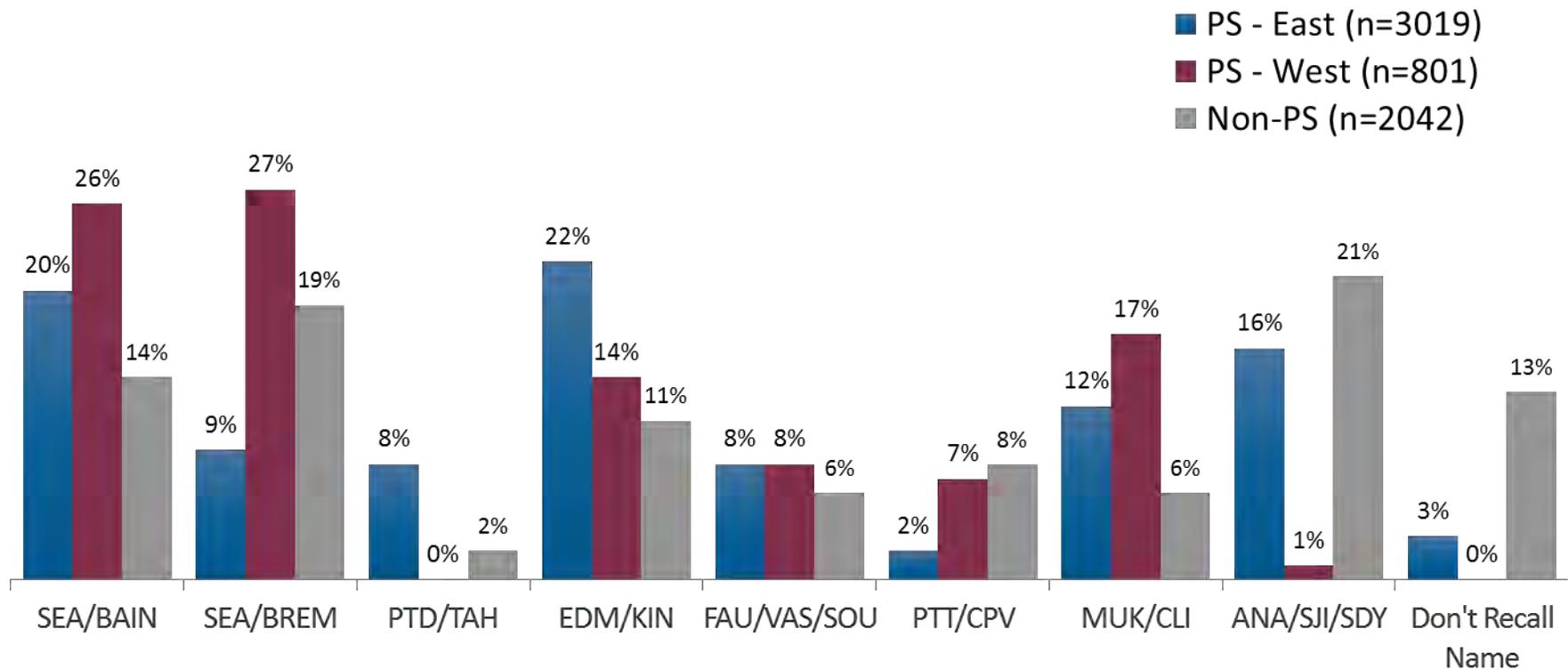
Three-quarters (74%) of Puget Sound residents have used WSF in the last year, while over half (59%) of residents outside Puget Sound have NOT used WSF in the last year.



Last Route Traveled – VOWS Panel

Residents in Westside Puget Sound (PS) communities use the Seattle/Bremerton (27%) and Seattle/Bainbridge (26%) routes more than Eastside PS communities (9%; 20%). Eastside Puget Sound communities most frequently travel along the Edmonton/Kingston route (22%). Residents outside Puget Sound use the Anacortes/San Juan (21%) and Seattle/Bremerton (19%) routes the most.

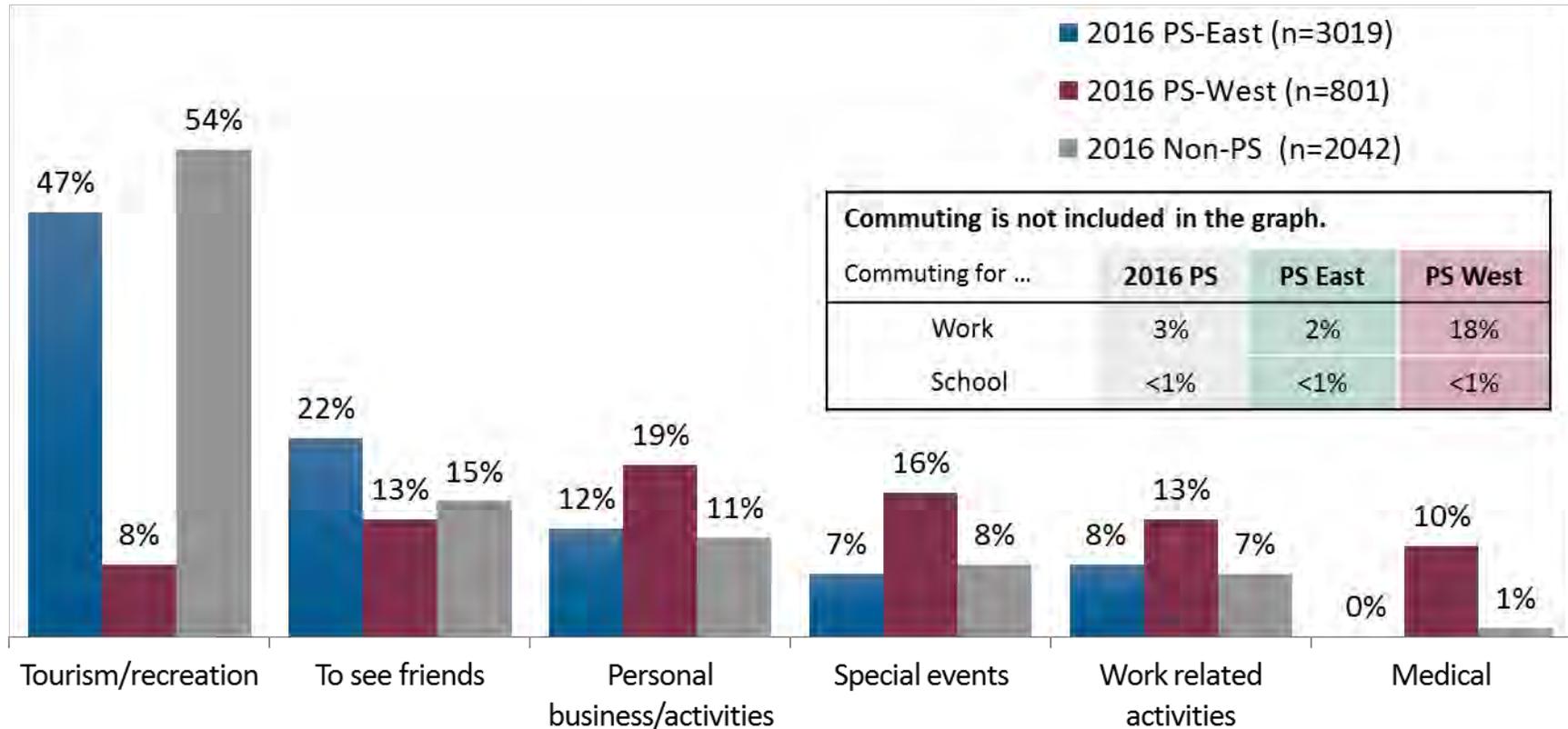
Last Route Travelled (2016)



Last Trip Purpose – VOWS Panel

Residents living on the Westside of Puget Sound use the ferries for a wide range of activities. Residents on the Eastside (47%) and residents outside of Puget Sound (54%) primarily use the ferries for recreational purposes.

Most Frequently Mentioned Trip Purpose (2016)



All Routes Ever Traveled – VOWS Panel

A majority of Puget Sound residents have travelled on Seattle/Bremerton (67%), Edmonds/Kingston (65%), Seattle/Bainbridge (62%), Anacortes (58%), and Mukilteo-Clinton (56%) routes at some point.

All Routes Ever Travelled - 2016						
	PS 2016 (n=4026)		PS East (n=3019)		PS West (n=801)	
	Total	Last	Total	Last	Total	Last
SEA/BAIN	62%	20%	61%	20%	78%	25%
SEA/BREM	67%	11%	66%	9%	77%	26%
PTD/TAH	21%	7%	22%	8%	13%	0%
EDM/KIN	65%	21%	63%	21%	86%	14%
FAU/VAS	42%	4%	43%	4%	31%	0%
FAU/SOU	25%	3%	24%	3%	39%	7%
SOU/VAS	21%	1%	20%	1%	31%	1%
PTT/CPV	39%	2%	36%	2%	64%	7%
MUK/CLI	56%	13%	57%	12%	50%	17%
ANA/SJI	58%	10%	58%	10%	50%	1%
Inter SJI	40%	2%	40%	2%	37%	0%
Sidney	26%	4%	26%	4%	27%	0%

Freight Shippers Usage & Attitudes Towards WSF

Freight Shippers Usage & Attitudes Towards WSF – Summary

Contains information regarding:

- ❖ Freight usage frequency
- ❖ Freight decisions
- ❖ Commercial vehicle reservation system

Information gathered from the following survey*:

Freight Shippers Survey

Telephone interviews with freight company decision makers

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Over half (52%) of freight customers use WSF at least weekly, compared to 47% in 2014.

The freight companies surveyed averaged 15 trips per month.

As in 2014, Edmonds/Kingston is the most frequently used freight route overall. Unlike 2014, the Mukilteo/Clinton is the single most used route in 2016.

Since 2014 there has been a decline in Peak trips by freight companies.

By a 49% (wait) to 9% (fares) margin, freight shippers say the time trucks have to wait at terminals has a bigger impact on their travel behavior than fares.

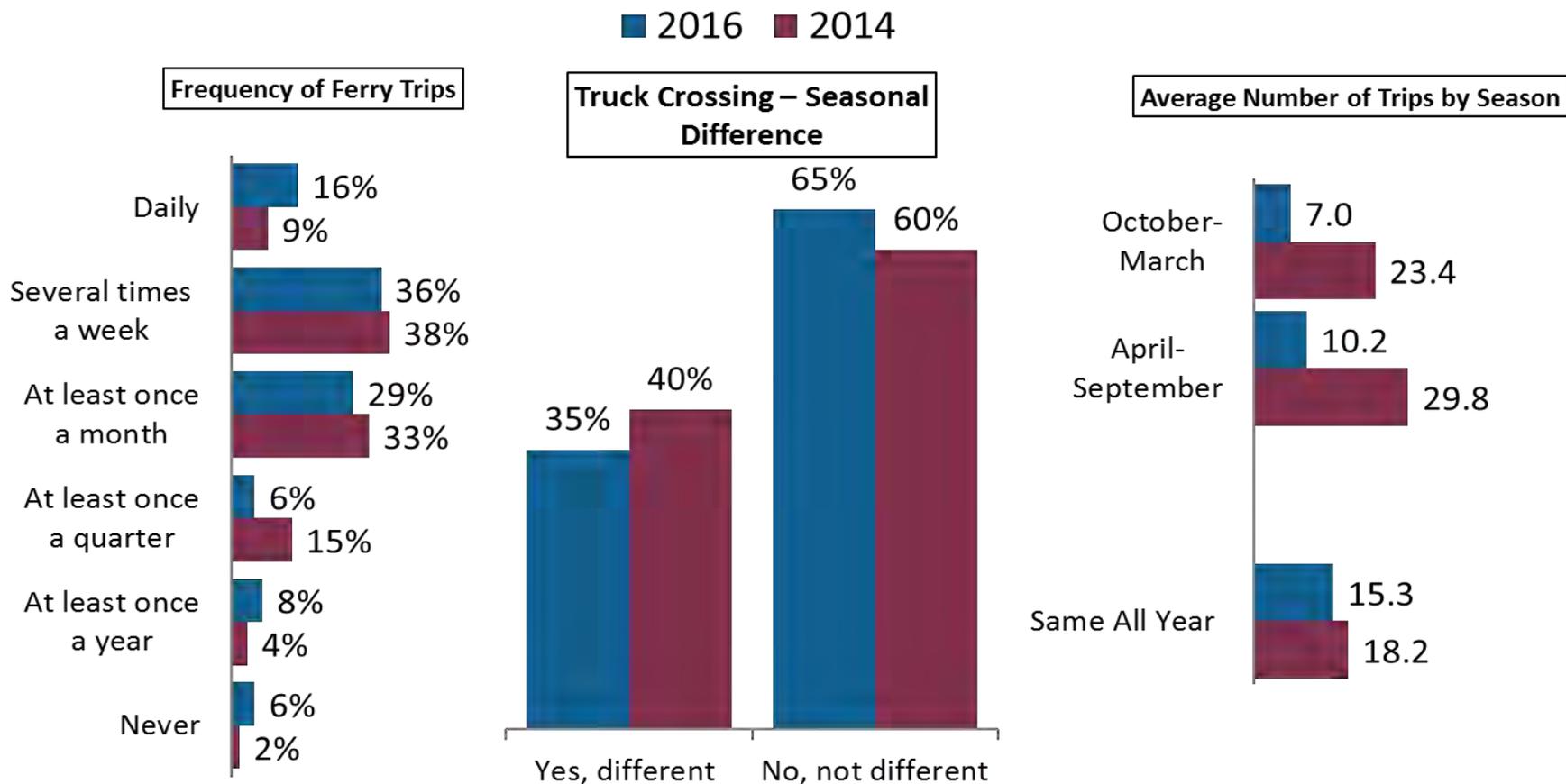
Just under half (46%) of freight shippers say wait times are at least a moderate (34%) or major (12%) issue or problem, which is up from 42% in 2014.

Approximately eight in ten (83%) freight shippers say they are aware of the reservation system. The majority use the commercial reservation system always (70%) or often (11%). Only 3% never use the system. Of those customers who use the reservation system, most say they are satisfied.

The majority of freight company decision makers say their frequency of ferry use for freight has not changed and a strong majority (88%) say that they consider WSF to be a good value.

Ferry Usage

Over half of freight customers (52%) use WSF at least weekly – this is up from 47% in 2014. For those whose trips vary by season (35%), they average 10 spring/summer trips compared to 7 fall/winter trips, both of which have significantly decreased since 2014 (30 spring/summer trips and 23 fall/winter trips). Companies whose freight trips are consistent year-round average 15 trips per month, a decrease from 18 trips in 2014.



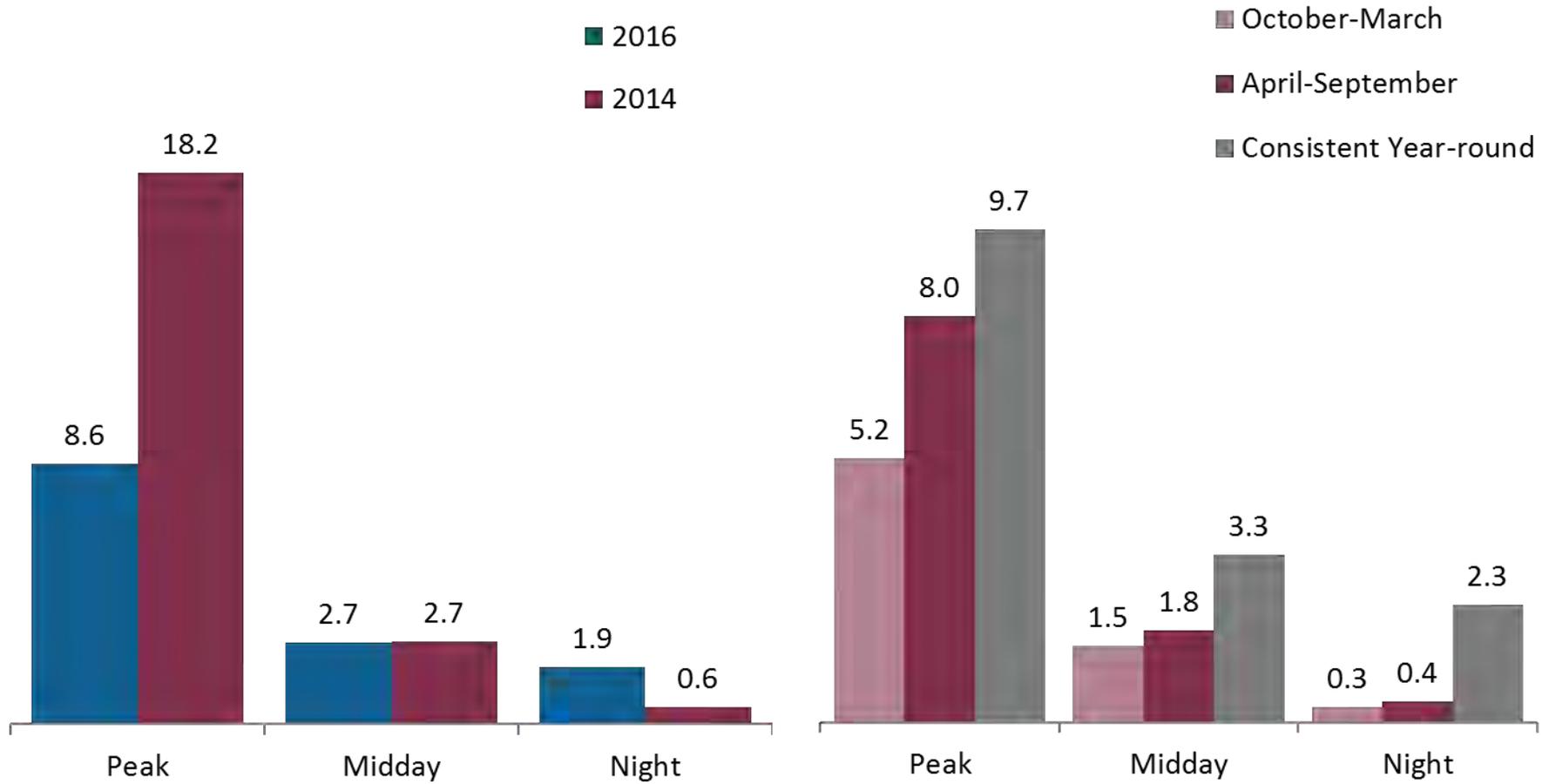
Routes Traveled

As in 2014, Edmonds/Kingston is the most frequently used route overall. Unlike 2014, Mukilteo/Clinton is the single most used route in 2016.

Route	Total Use		Most Used	
	2016	2014	2016	2014
Edmonds / Kingston	41%	36%	19%	20%
Mukilteo / Clinton	33%	30%	23%	14%
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	33%	29%	10%	8%
Seattle / Bainbridge	28%	23%	15%	14%
Fauntleroy / Vashon	15%	14%	2%	--
Coupeville / Port Townsend	15%	12%	2%	2%
Seattle / Bremerton	12%	14%	4%	12%
Vashon / Southworth	10%	10%	2%	4%
Point Defiance / Tahlequah	8%	6%	2%	2%
Fauntleroy / Southworth	7%	6%	--	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	7%	9%	--	--
Anacortes / Sidney	6%	3%	--	2%
Routes used Equally	--	--	19%	14%
Don't know/Refused	5%	5%	2%	6%

Average Number of Trips by Time of Day

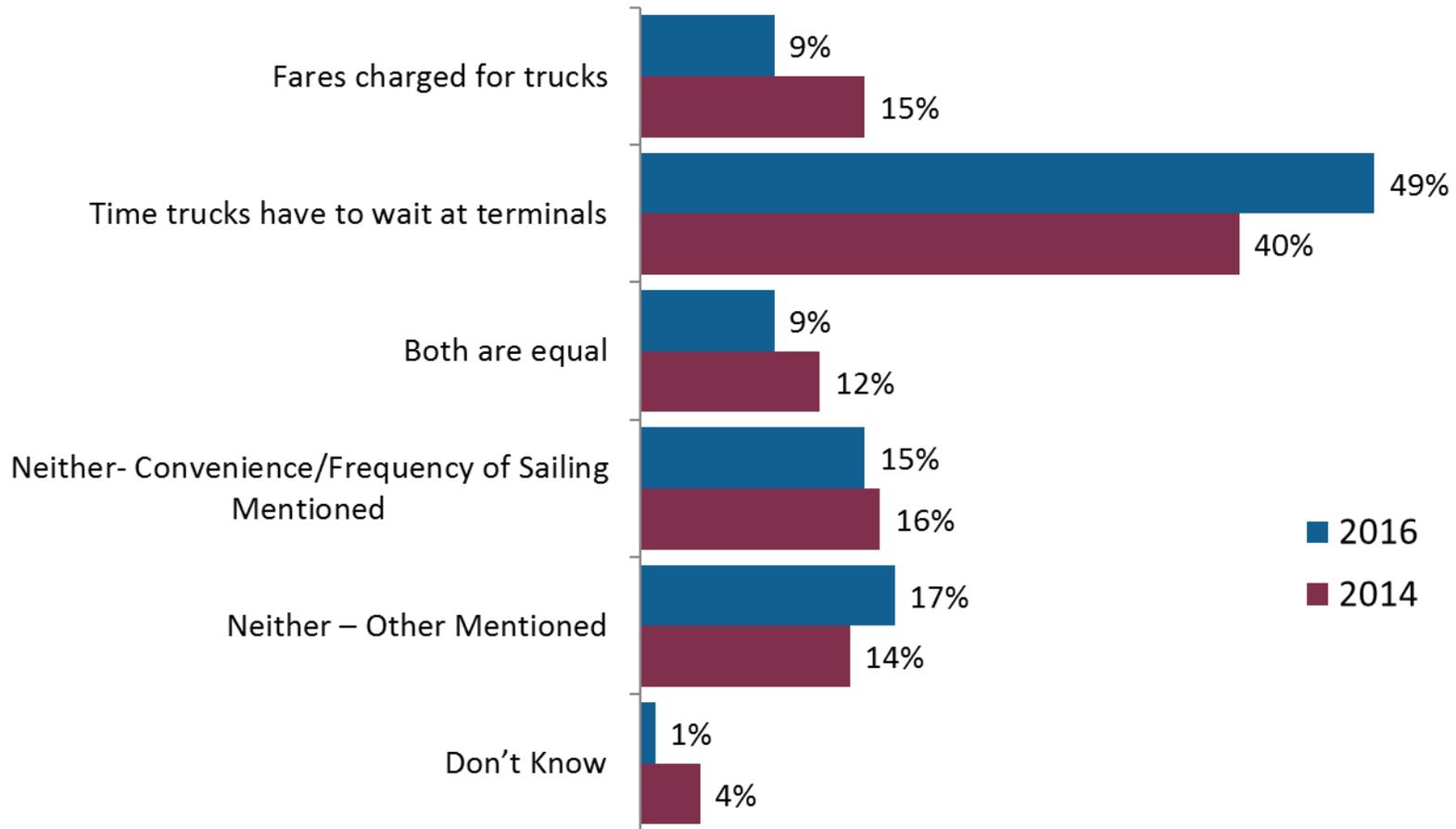
Since 2014 there has been a dramatic decline in peak trips (18.2 to 8.6 average trips) by freight companies. Both freight companies that vary their trips by season and those whose usage is consistent year-round take the majority of their trips during Peak hours.



Impact of Fare and Wait Times

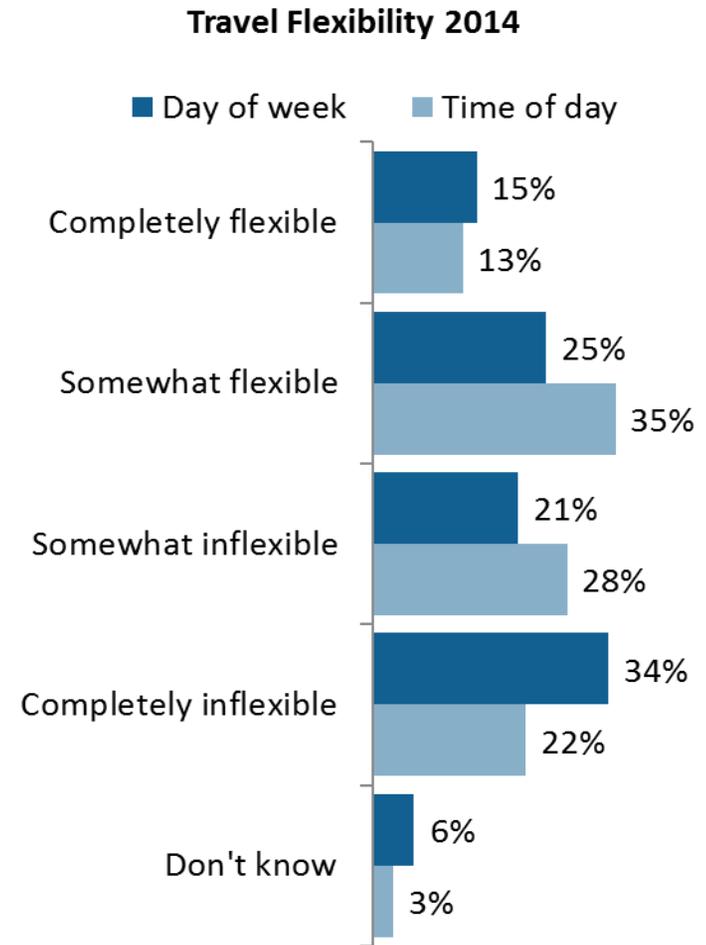
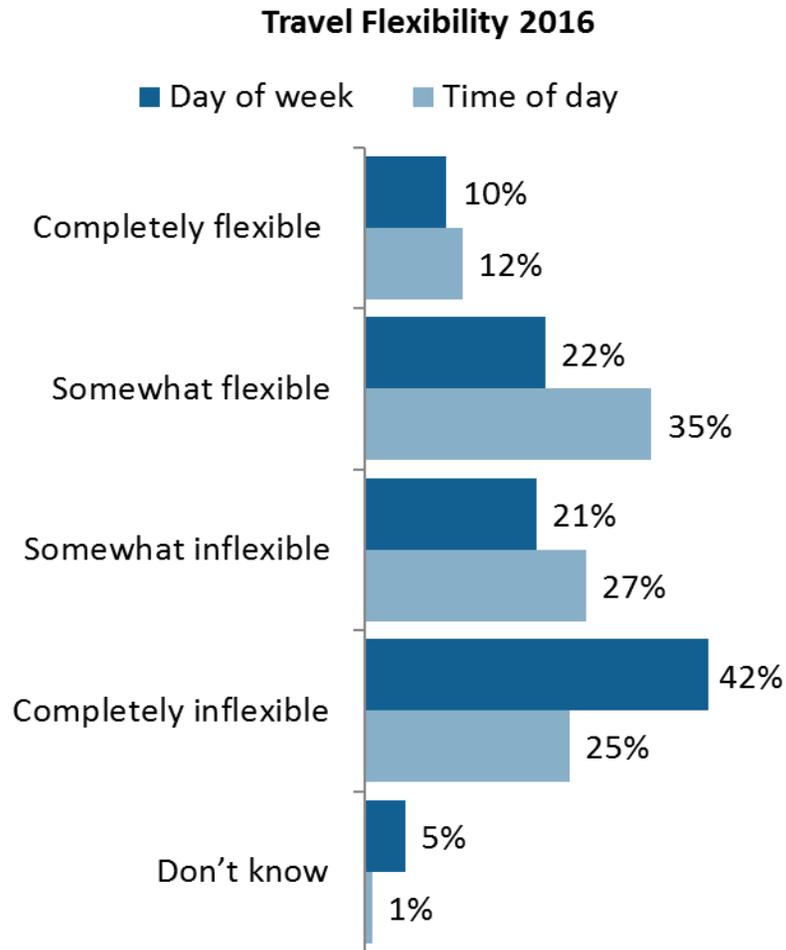
When asked, which had a greater impact, the cost of fare or the time trucks have to wait at the terminals, the clear answer for freight shippers was wait at terminals time (49%), with fares at only 9%. Compared to 2014, time has become an even greater impact compared to fares.

Impact of Fares and Wait Times



Schedule Flexibility

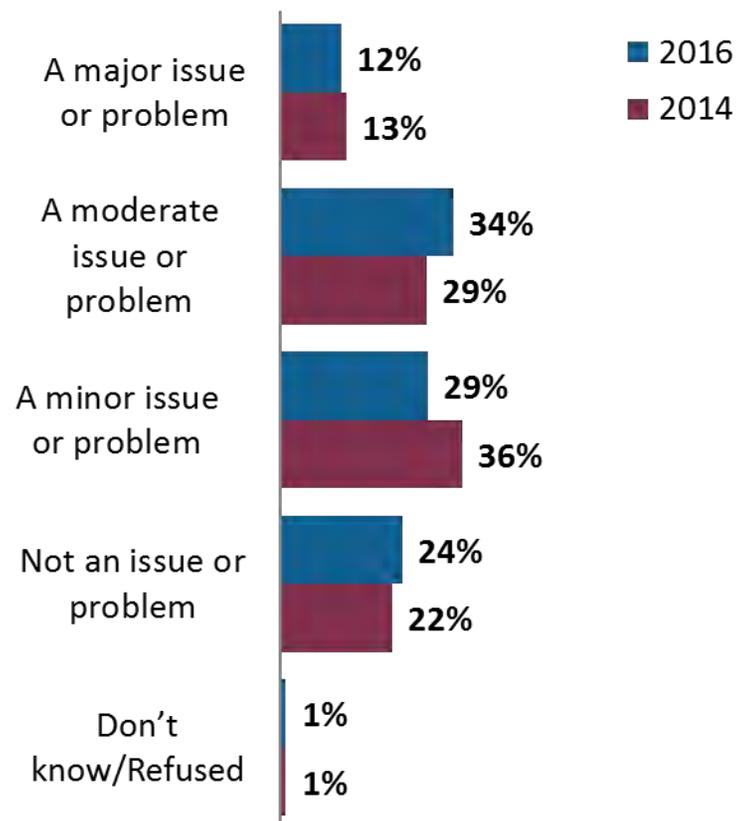
About half (47%) of all freight companies have at least some flexibility when selecting travel time and 32% have at least some flexibility when selecting travel day, a decline from 40% in 2014.



Wait Times

Just under half (46%) of freight shippers say wait times are at least a moderate (34%) or major (12%) issue or problem, which is up from 42% in 2014. The Anacortes/San Juan route continues to have the most mentions of long wait times with an average 1.9 boat wait, although sample sizes are very small.

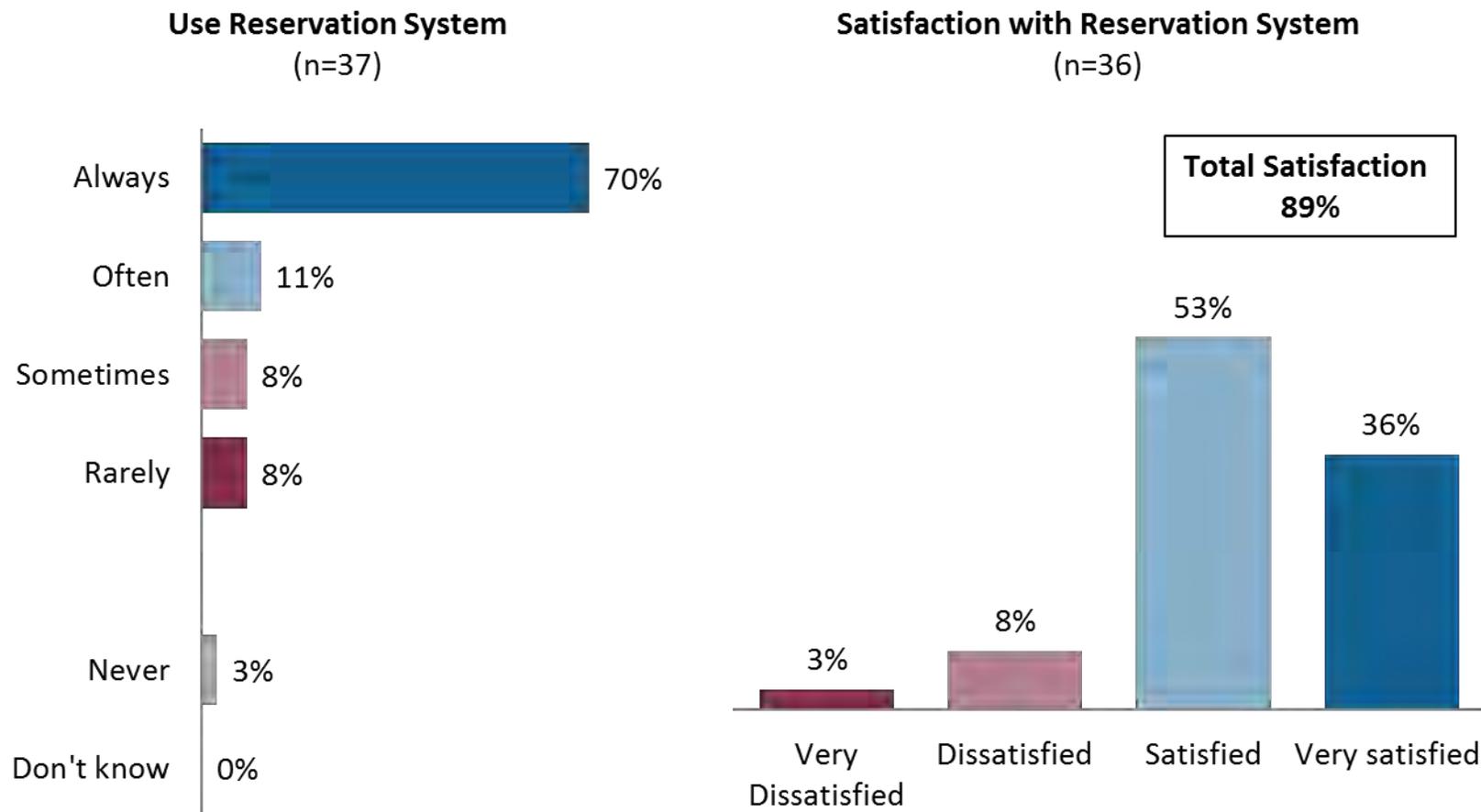
Impact of Wait Times



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2016 n=75	2014 n=84	2016	2014
Anacortes / San Juans	19%	19%	1.9 [n=12]	2.6 [n=15]
Edmonds / Kingston	16%	8%	1.1 [n=10]	1.8 [n=4]
Mukilteo / Clinton	13%	12%	1.6 [n=9]	1.0 [n=7]
Seattle / Bainbridge	11%	10%	1.0 [n=6]	1.0 [n=6]
Coupeville / Port Townsend	4%	4%	1.0 [n=3]	1.5 [n=2]
Interisland San Juans	3%	4%	1.0 [n=2]	0.7 [n=3]
Seattle / Bremerton	1%	5%	1.0 [n=1]	1.3 [n=3]
Fauntleroy / Vashon	1%	5%	1.0 [n=1]	0.5 [n=2]
Anacortes / Sidney	1%	--	1.0 [n=1]	--
All routes	3%	3%	--	--
None	19%	17%	--	--
Don't know	12%	19%	--	--

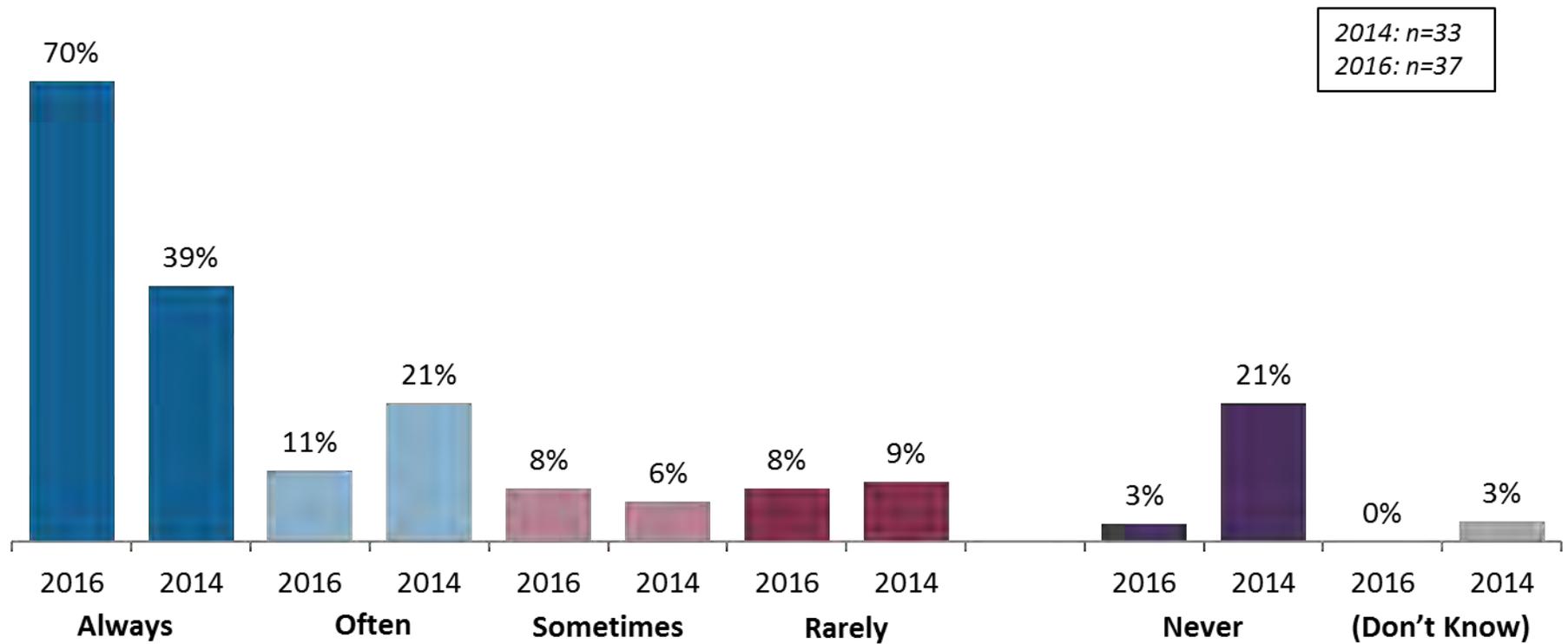
Reservation System

Approximately eight in ten (83%) freight shippers say they are aware of the reservation system. Of those customers who use the Coupeville/Port Townsend or Anacortes routes (n=37), the majority use the reservation system always (70%) or often (11%). Only 3% never use the system. Of those customers who use the reservation system (n=36), most (89%) say they are satisfied.



Reservation System Comparison

The Coupeville/Port Townsend and Anacortes reservation system has become more popular in the last two years, with the percentage of people who never use it dropping from 21% to 3%. Additionally, the percentage of people who always use it has risen by 31 percentage points.*



*This question changed in 2016 to omit the word “commercial” when describing the vehicle registration system.

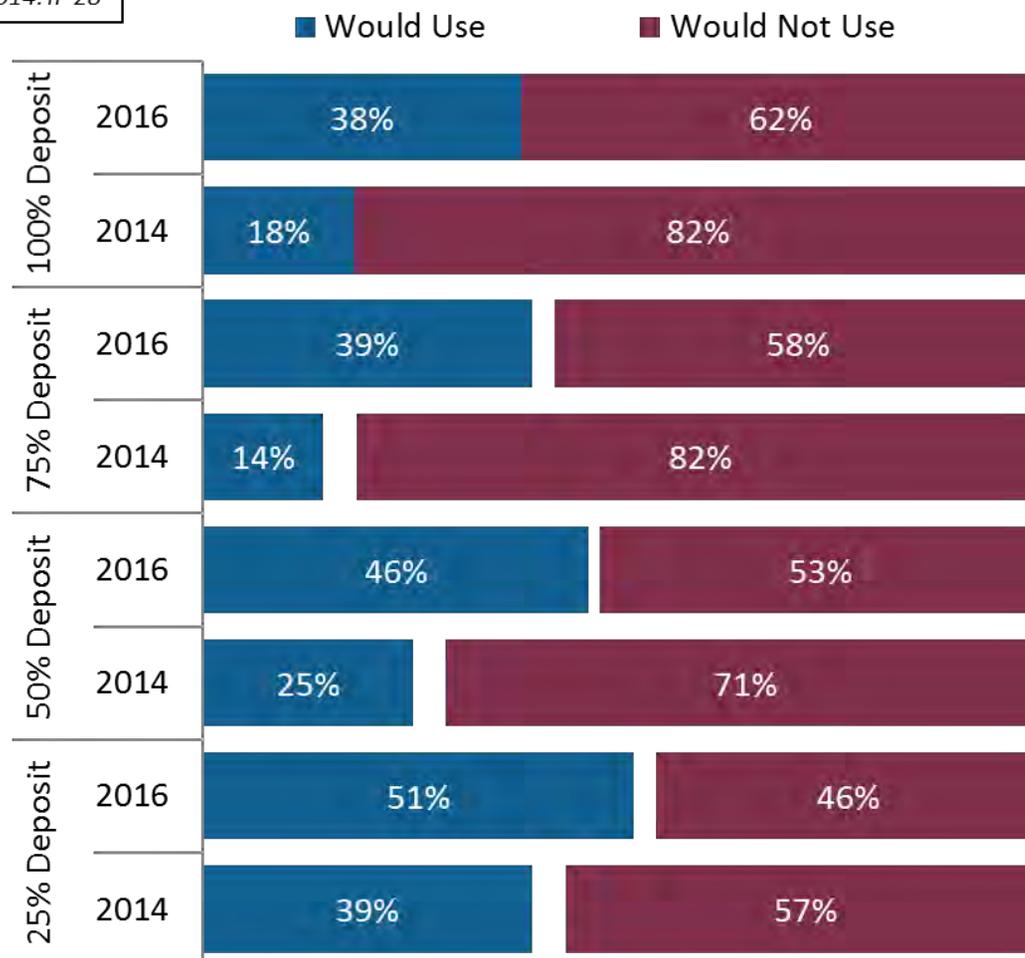
Reservation System Introduction

Of those freight companies who were not aware of the commercial reservation system (n=74), a majority (51%) say they would use it with a 25% deposit. With a 100% deposit 38% say they would use it. Overall, freight shippers who do not use the system are much more likely to consider it than they were two years ago.

2016: n=74
2014: n=28

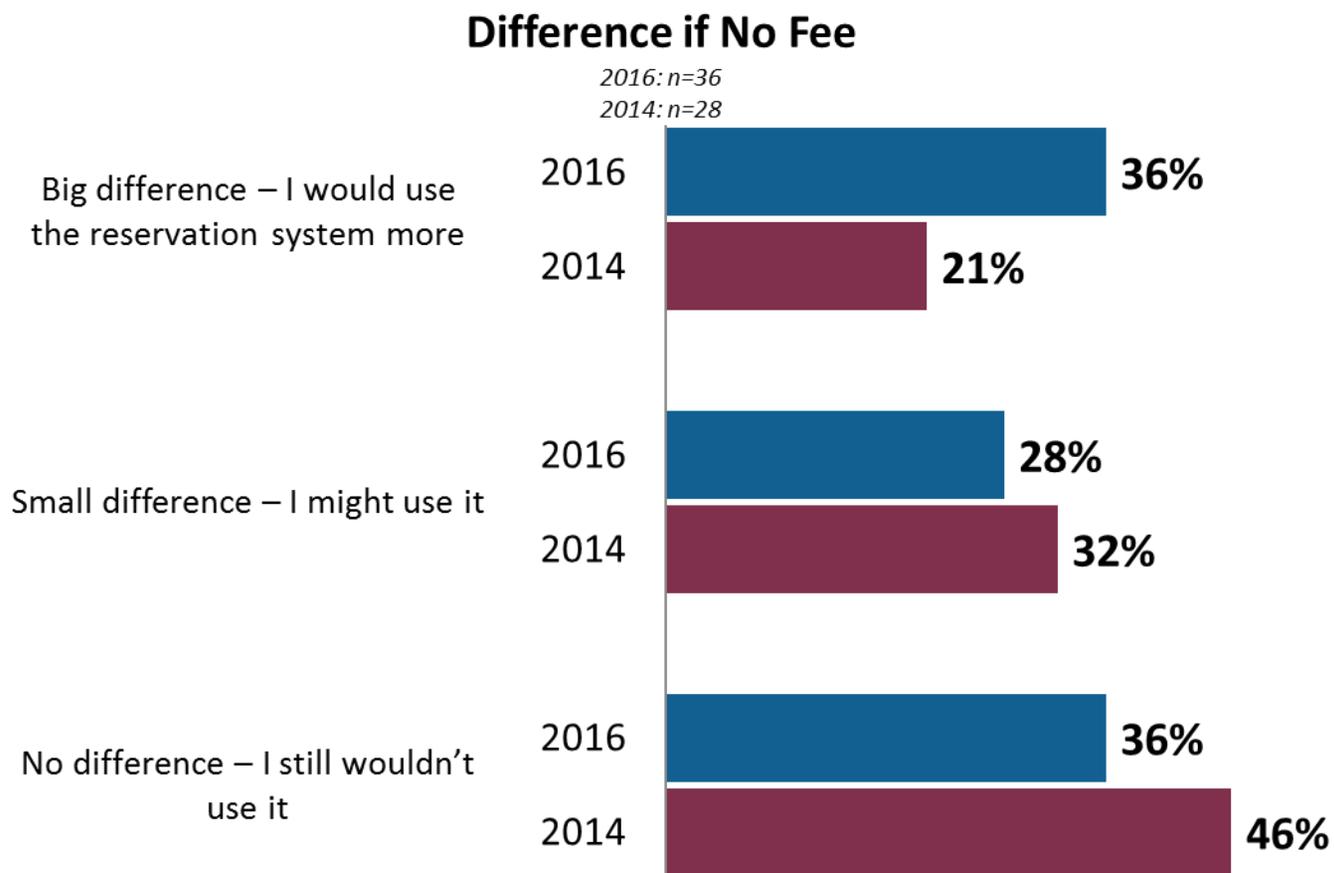
The current WSF vehicle reservation system has the following features:

- *Space is available for reservations up to two months ahead of the season schedule start date;*
- *No reservation deposit is necessary at the time the reservation is made;*
- *A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day;*
- *Reservations may be cancelled and/or changed once up to 5 pm of the prior day with no penalty;*
- *If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and*
- *The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.*



No Show Fee

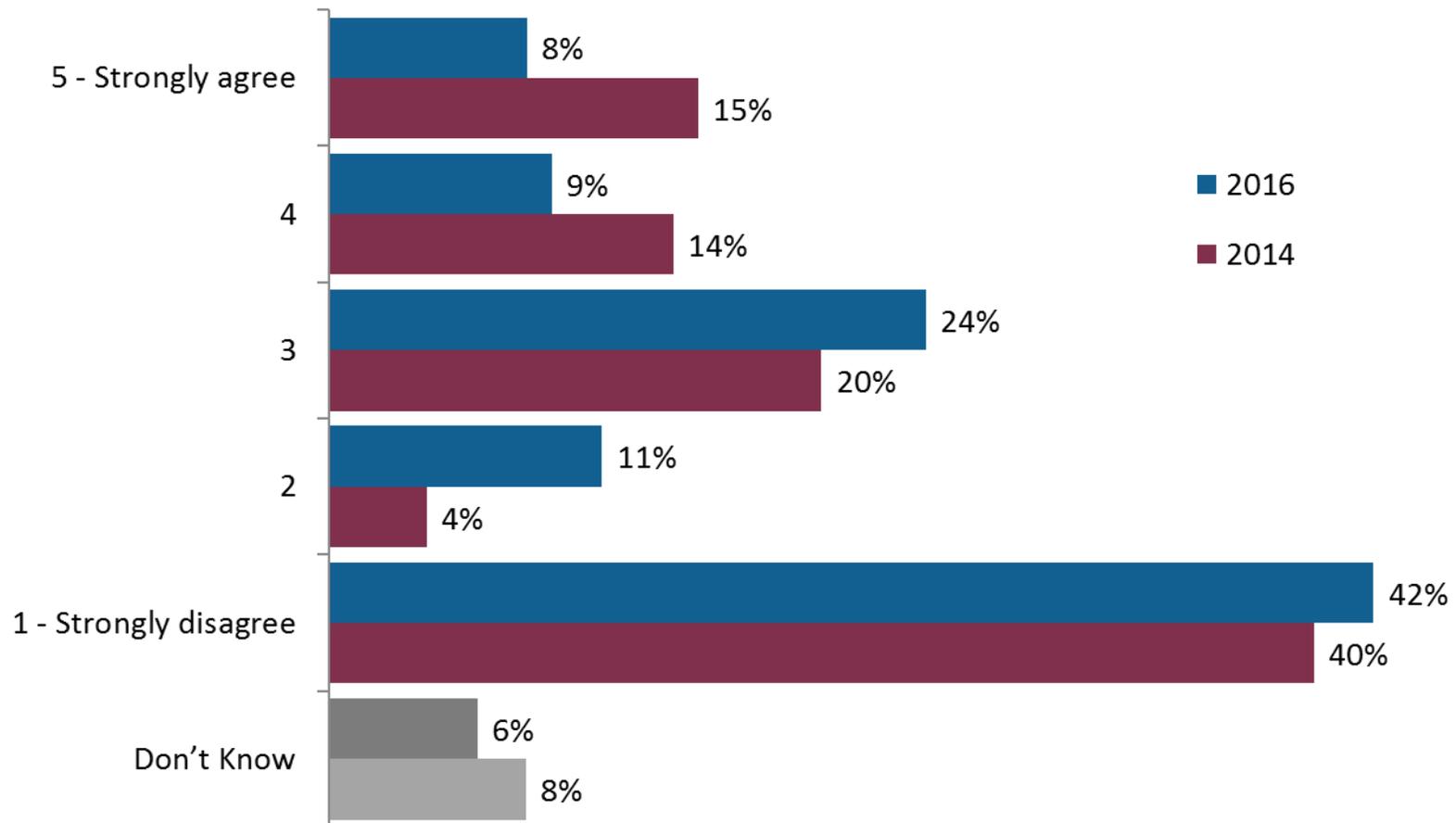
Almost two-thirds (64%) say not charging a no-show fee would make some difference in their likelihood to use the system. This is an increase from 2014 where a little over half (53%) said it would make a difference.



Congestion Pricing

By a 53% (a 2 or 1 score) to 17% (a 4 or 5 score) margin, freight shippers in 2016 disagree that they should be charged a premium over regular freight fares if they travel during peak periods – even when coupled with a discount for non-peak travel.

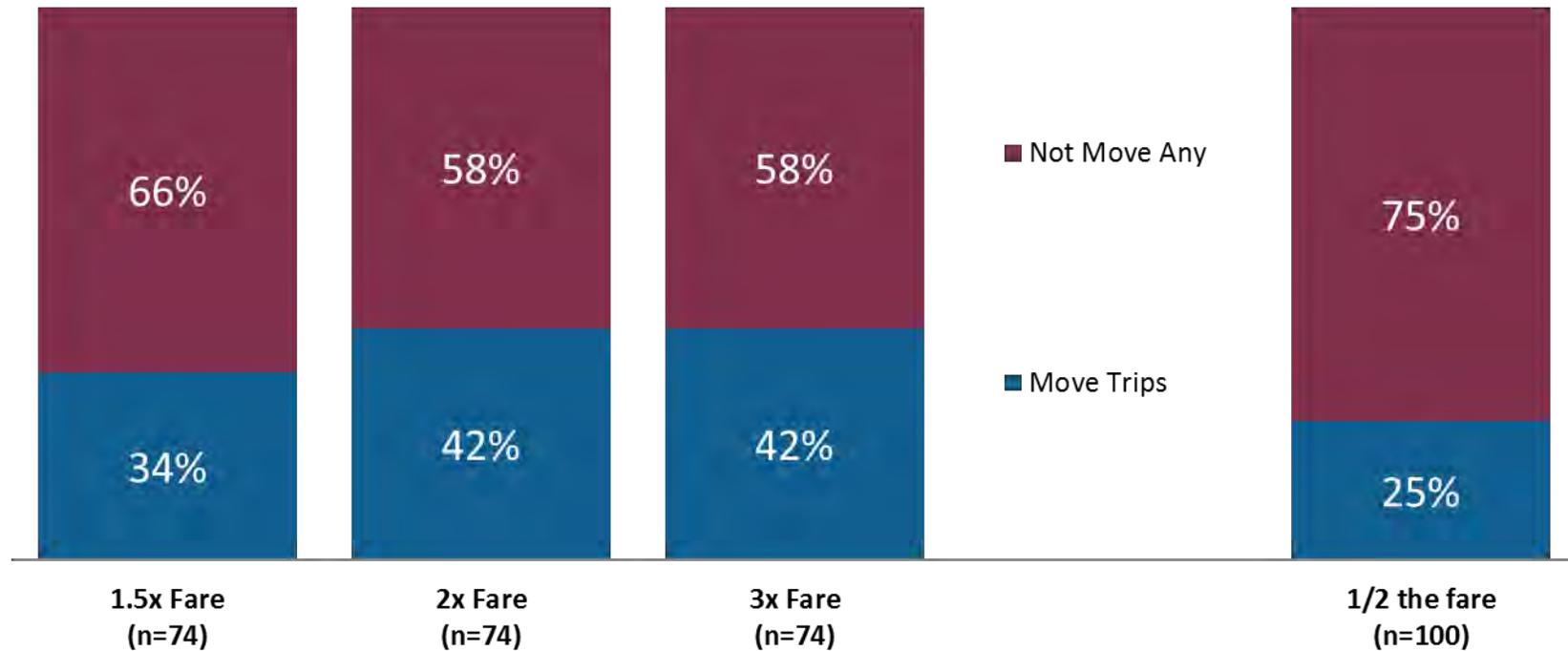
Congestion Pricing - Comparison



Impact of Fare Increases

Approximately one-third (34%) of freight shippers say they would shift trips to off peak times if the fare was increased 1.5x. About four-in-ten (42%) would shift trips for a 2.0x and 3.0x increase.

Would Move Trips to Off Peak

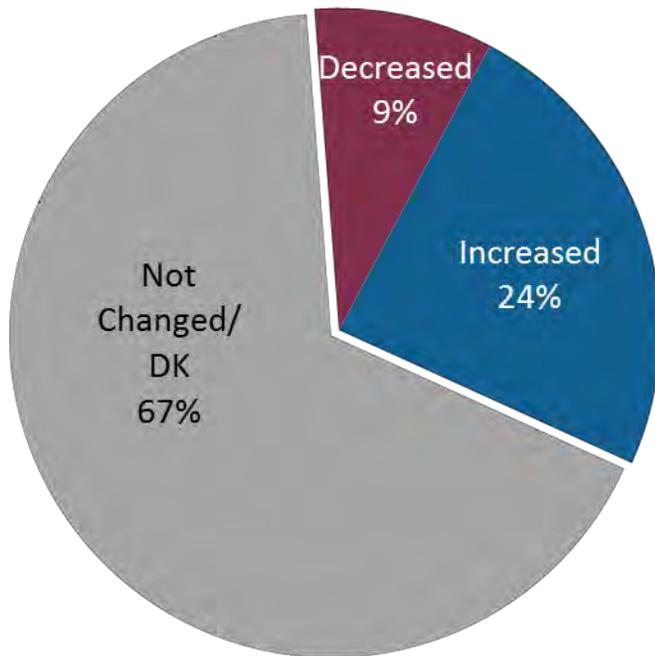


Changes in Travel Behavior

Two-thirds (67%) of freight shippers say their frequency of ferry use has not changed in the past year. One quarter (24%) say their trip frequency increased and 9% (n=9) say their trip frequency decreased. Of the 9 freight companies whose trips decreased, 3 mentioned changes delivery schedules and 3 mentioned their company has inexperienced a loss of customers/less work.

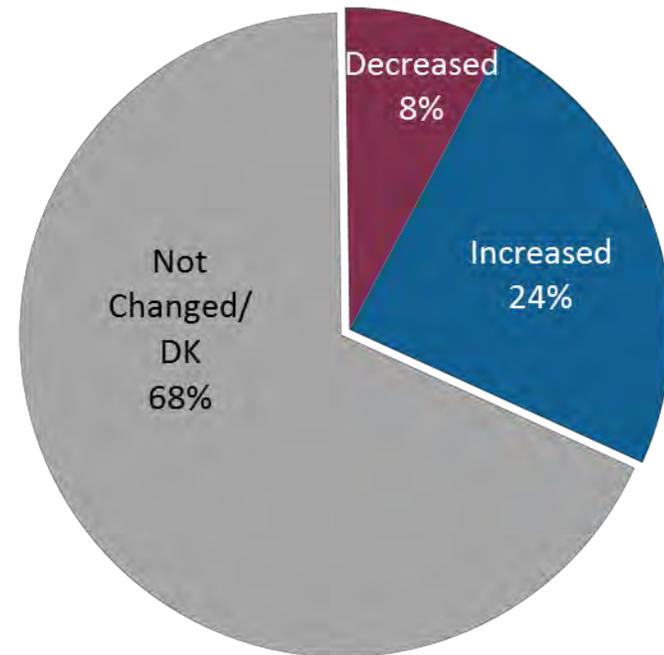
Changes in Travel Behavior (2016)

(n=100)



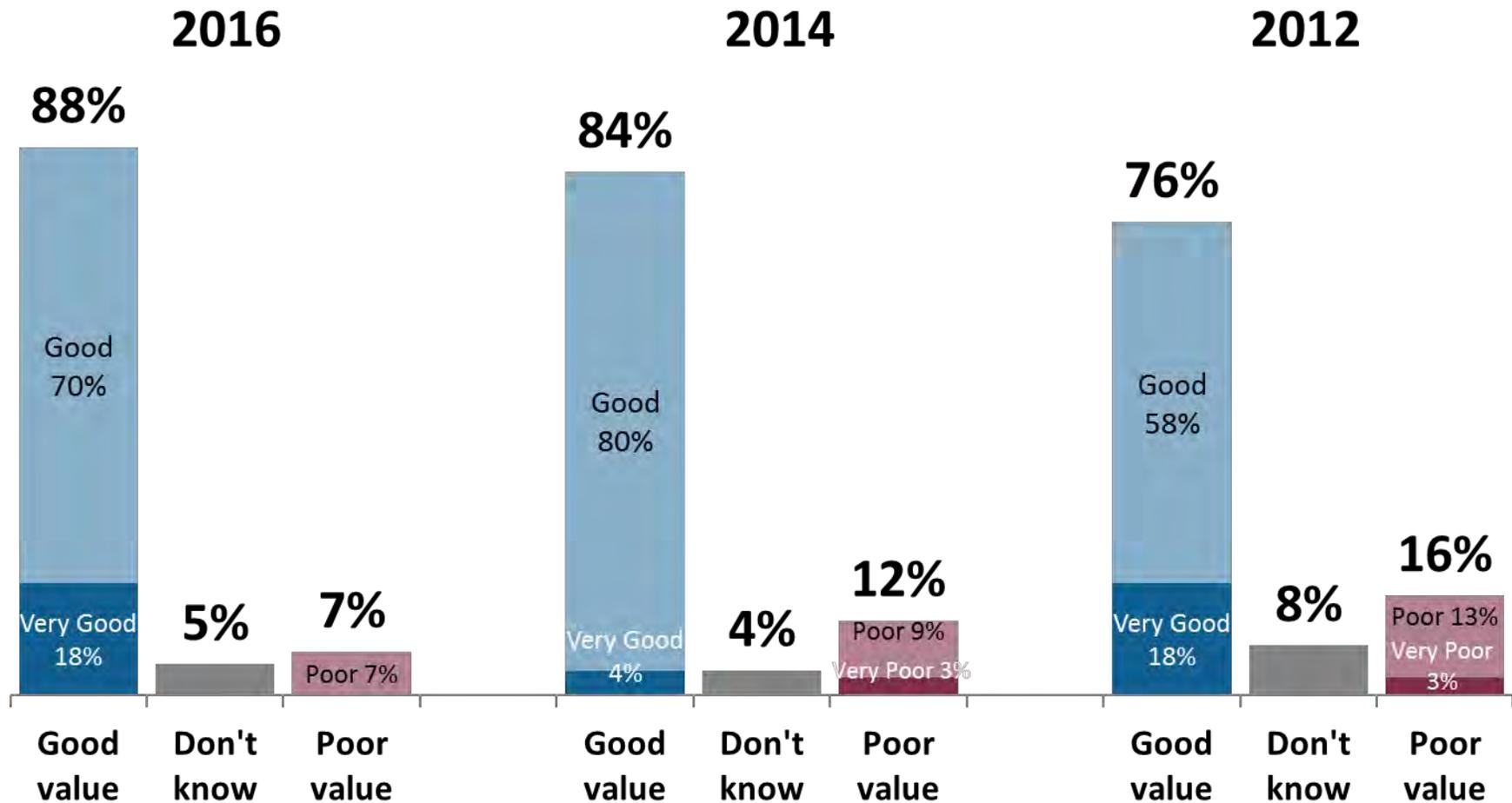
Changes in Travel Behavior (2014)

(n=101)



WSF Value

Overall, the perception of WSF as a good value has steadily increased from 2012 to 2016. In addition, the intensity has recovered from a dip in 2014, as the percentage of companies who find it to be a 'very good value' returns to 2012 levels. No one now finds it to be a 'very poor value.'



*General Public (VOWS) and Ferry Riders Opinion on
Ferry Naming*

General Public (VOWS) & Ferry Riders Opinion on Ferry Naming – Summary

Contains information regarding:

- ❖ Public opinion for new ferry name

Information gathered from the following survey*:

Ferry Quick Naming Poll

V.O.W.S. panel & FROG panel

Key Findings:

A majority of FROG panel respondents (55%) and a plurality of VOWS panel respondents (39%) chose the name Suquamish for the new Washington Ferry. After combining the two panels, a majority chose the same name (55%).

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

New Ferry Name

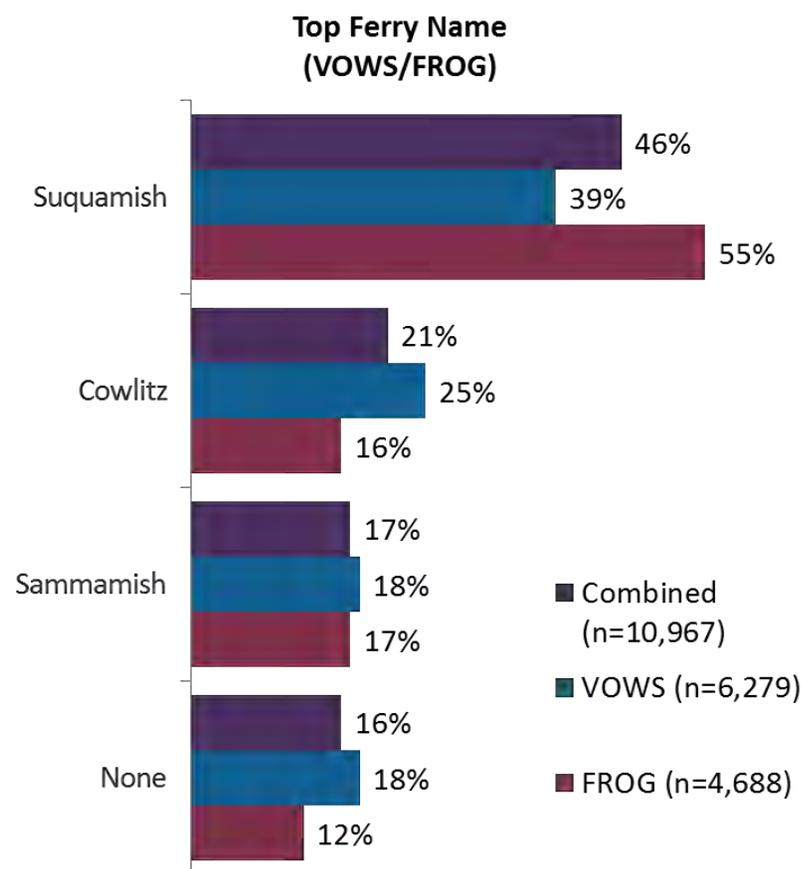
The Washington State Transportation Commission (WSTC) is considering three names for the next new ferry: Suquamish, Cowlitz, and Sammamish. The Commission requires the name should demonstrate a level of public support, have statewide meaning and significance, and have a connection to the state, as well as be a suitable name for a Washington State Ferry.

A plurality of combined VOWS and FROG panel respondents chose Suquamish (46%) as their preferred name for the new ferry. Among the VOWS panel about 4-in-10 respondents and a majority of FROG panel participants (55%) chose the same name.

SUQUAMISH: The ancestral Suquamish have lived in Central Puget Sound for approximately 10,000 years. The major Suquamish winter village was at Old Man House on the shoreline of Agate Passage at d’suq’wub meaning “clear salt water.” The Suquamish name translates into the “people of the clear salt water.” Chief Seattle was an ancestral leader of the Suquamish Tribe, born in 1786 at the Old Man House Village in Suquamish.

COWLITZ: The Cowlitz tribe provided key assistance with pioneer transportation and commercial activities in what some historians refer to as the Cowlitz Corridor which linked the Columbia River valley with South Puget Sound communities long before Washington Territory was established. The Washington Territorial Legislature honored the tribe by naming one of our earliest counties for them. This county includes a broad flood plain located at the mouth of the Cowlitz River at the Columbia River that was a swamp in pre-European settlement days which some authorities believe was the source for the meaning of the name Cowlitz, which is “capturing medicine spirit.”

SAMMAMISH: The Sammamish people were a Coast Salish Native American tribe in the Sammamish River Valley. Sammamish is a blend of two Native American words – samena, which means hunter and mish, which means people. The largest Sammamish village was tlah-WAH-dees at the mouth of the Sammamish River. In 1855, the United States government signed the Treaty of Point Elliott with the leaders of most of the Puget Sound Tribes and they were relocated. Descendants of the Sammamish dispersed into other tribes, including the Suquamish, Snoqualmie and Tulalip.



*FROG Panel Opinion Regarding WSF Reservation
System*

FROG Panel Opinion Regarding WSF Selected Routes Reservation System – Summary

Contains information regarding:

- ❖ Usage & Completion Issues
- ❖ Satisfaction with Reservation Program
- ❖ Reasonableness of Reservation Program
- ❖ Multiple Reservations
- ❖ No-Show Fees
- ❖ Worry Level Concerning Reservation Loss

Information gathered from the following survey*:

Summer Reservation Survey
FROG panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

A majority (55%) of those interviewed have used or tried to use the WSF reservation system. A large majority (86%) of riders who used the system has no problems completing their reservation.

Overall, an average of 6.9 reservations per year per rider were made last year.

A majority of riders that had problems making a reservation (65%) and those who tried to make a reservation, but never completed it (70%) used the WSF website.

An overwhelming majority of riders are satisfied with the system (79%). San Juan riders are less satisfied than other riders.

Approximately 8-in-10 (78%) respondents said the current program is reasonable, up from 69% in 2015.

A majority of respondents, say they have used, or will use, the Port Townsend – Coupeville (56%) and Anacortes – San Juan Islands (52%) routes.

Almost half (45%) of respondents made multiple reservations.

A large majority (79%) of riders that use the reservation system are satisfied with the customer service at the terminal.

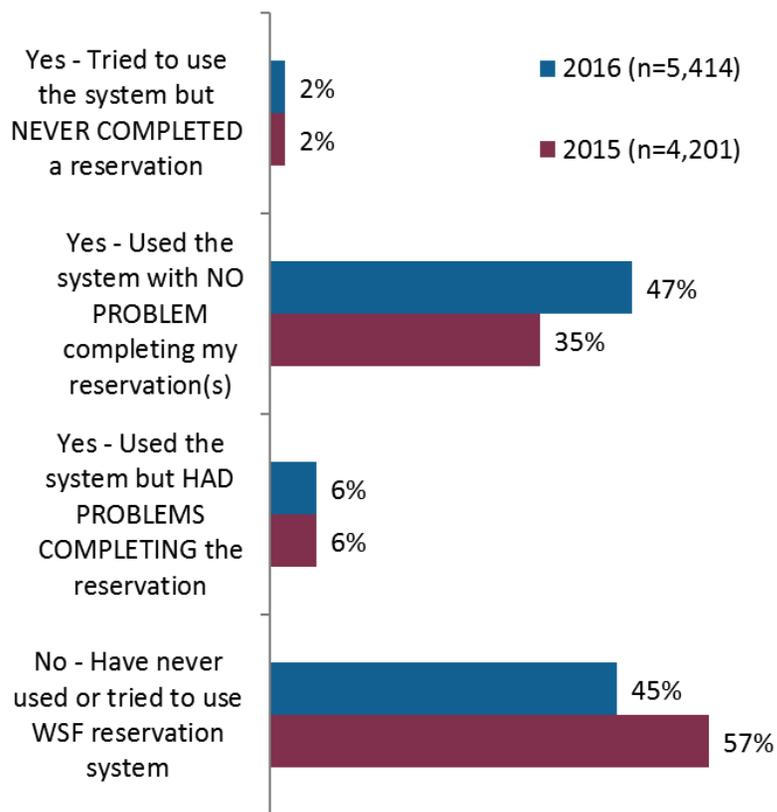
A majority (62%) of reservation users say making the toll booth in time is either a large worry or worry. However, only one-in-ten respondents (13%) have actually missed their scheduled sailing.

Just over half (53%) of riders said the no-show fees should be raised to \$23 (on average). However, half (50%) of all respondents suggest the fee should remain where it is - the average amount to raise the no-show fee among all respondents is \$17.

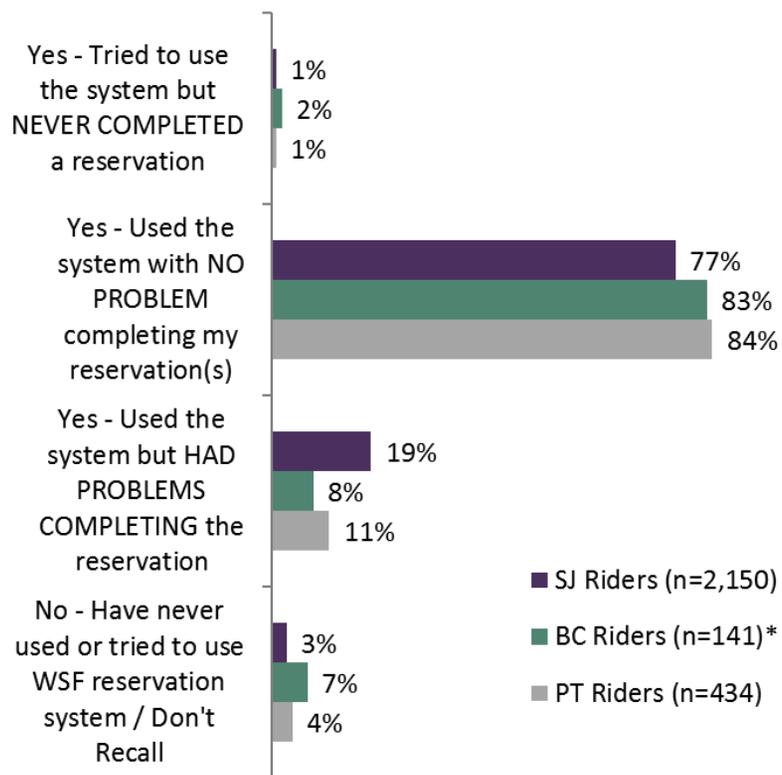
Reservation System Usage

A majority (55%) of FROG panel members have used or tried to use the WSF reservation system. Approximately 86% of those who used the system had no problems completing their reservation, 11% had problems, and 4% tried to use the system, but never completed their reservation. The highest concentration of those having problems completing their reservation are riders in the San Juan Islands (19%).

Reservation System Usage



Reservation System Usage by Route

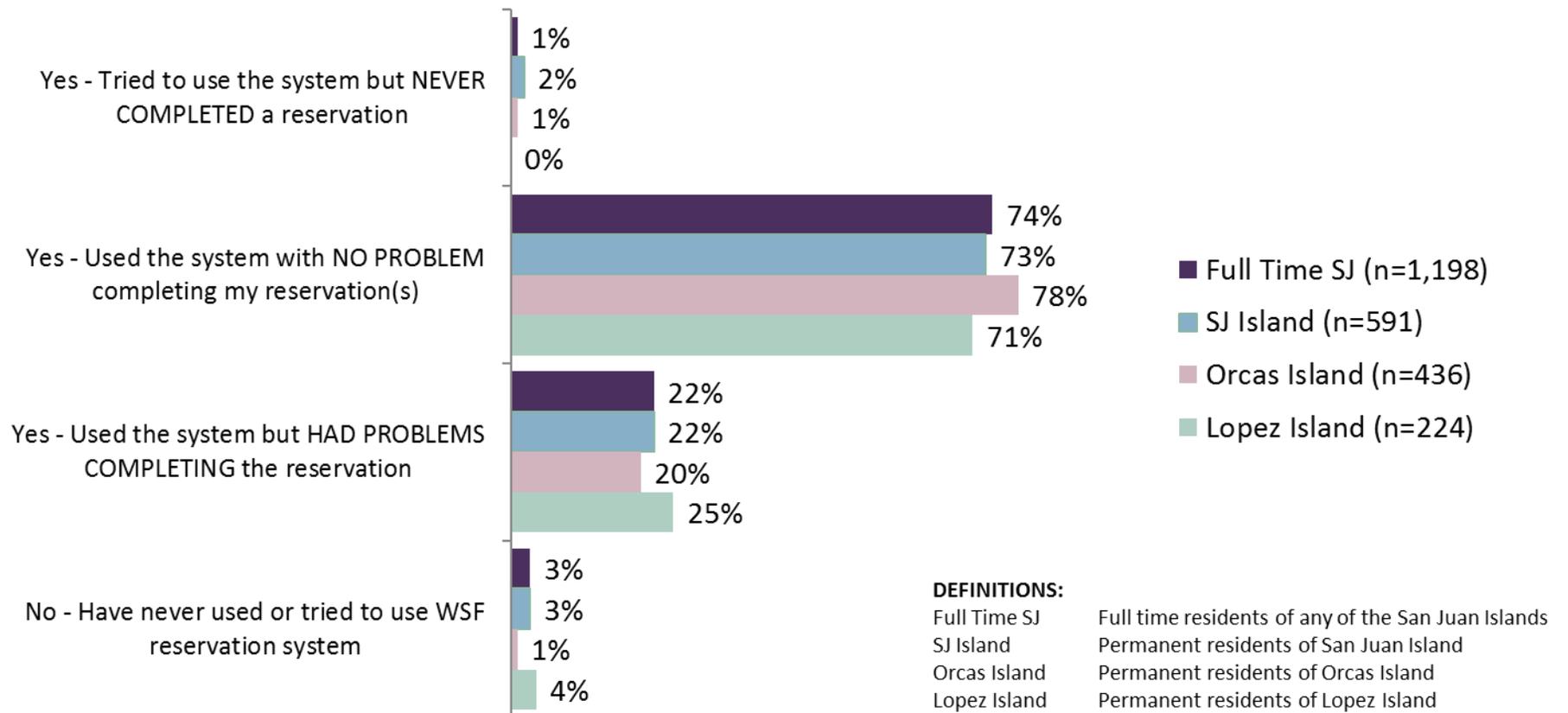


*Note: Small Sample Size under 150

Reservation System Usage – By SJ Island Residents

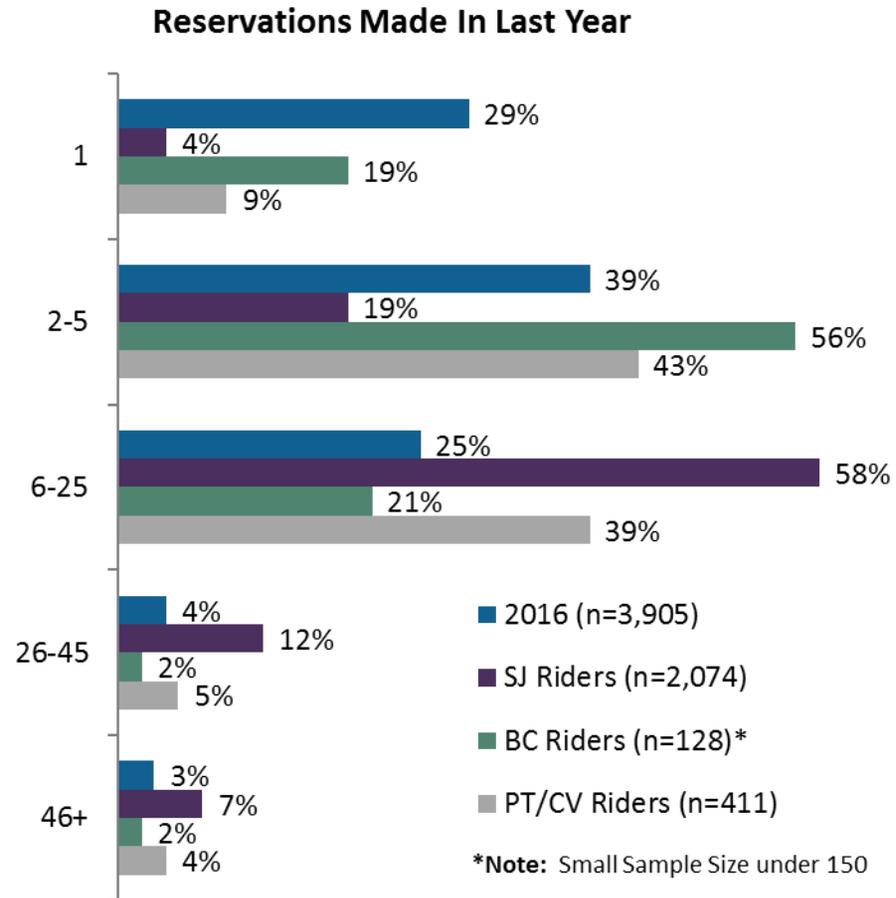
Residents of Lopez Island (25%) had a slightly higher concentration of problems completing their reservations than residents on either San Juan (22%) or Orcas (20%) islands.

San Juan Route Reservation System Usage By Full Time SJ Island Residents



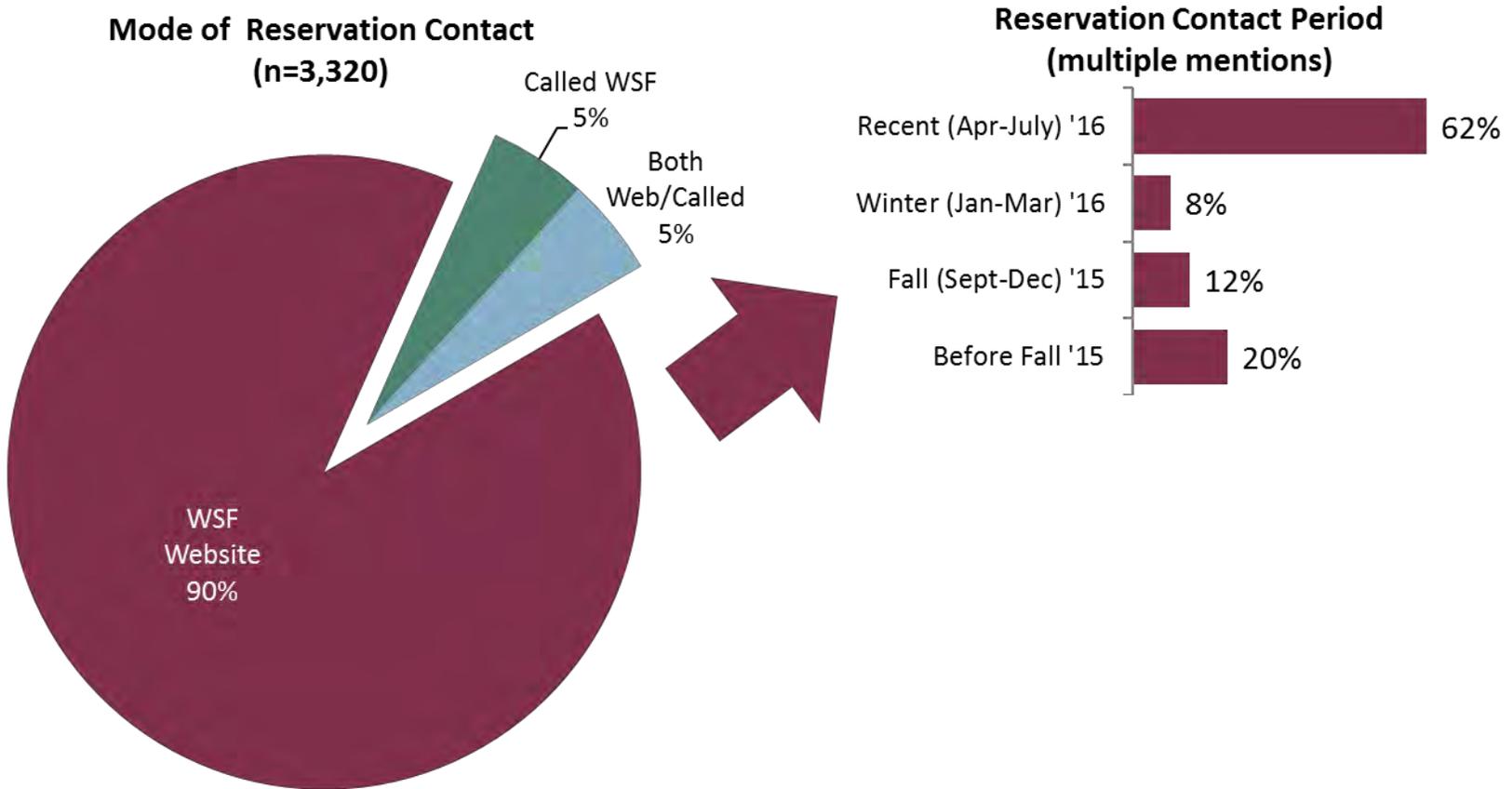
Reservations Made in Last Year

System-wide the 3,905 respondents that completed an average of 6.9 reservations in the last year. Those that used the San Juan Island routes last averaged 16.1 reservations per year compared to 9.4 for those that last used the Port Townsend route. Those living full time on San Juan (19.4), Orcas (20.1), and Lopez (19.9) all make more reservations on average than either system-wide (6.9) or San Juan visitors (5.2). Those dissatisfied with the reservation system made statistically more reservations (10.2) than those satisfied (6.6).



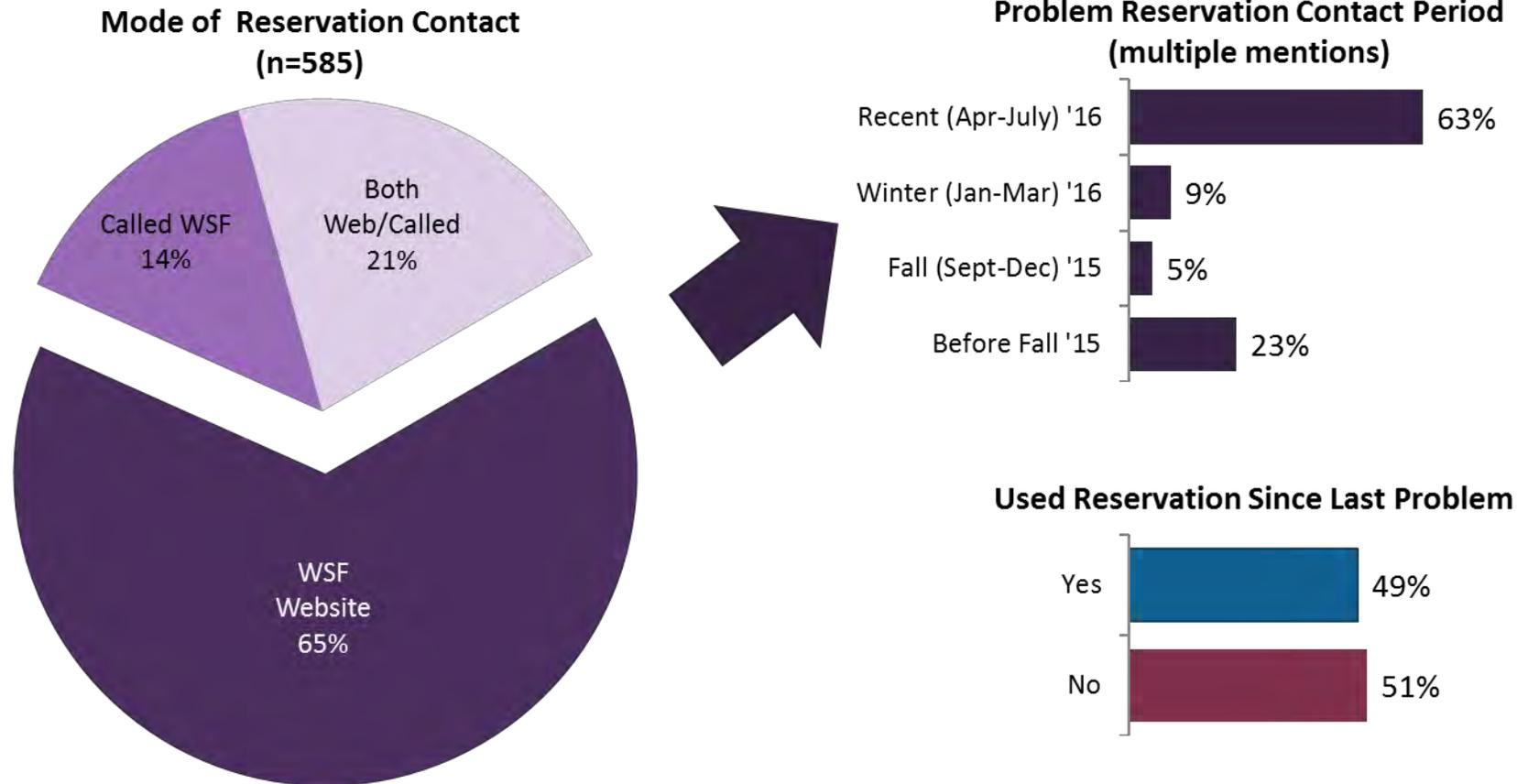
No Reservation Problems

Of the 3,320 riders that have had no problems making reservations, 95% used the WSF website and 10% called WSF, with the majority reporting this activity happened recently (62%).



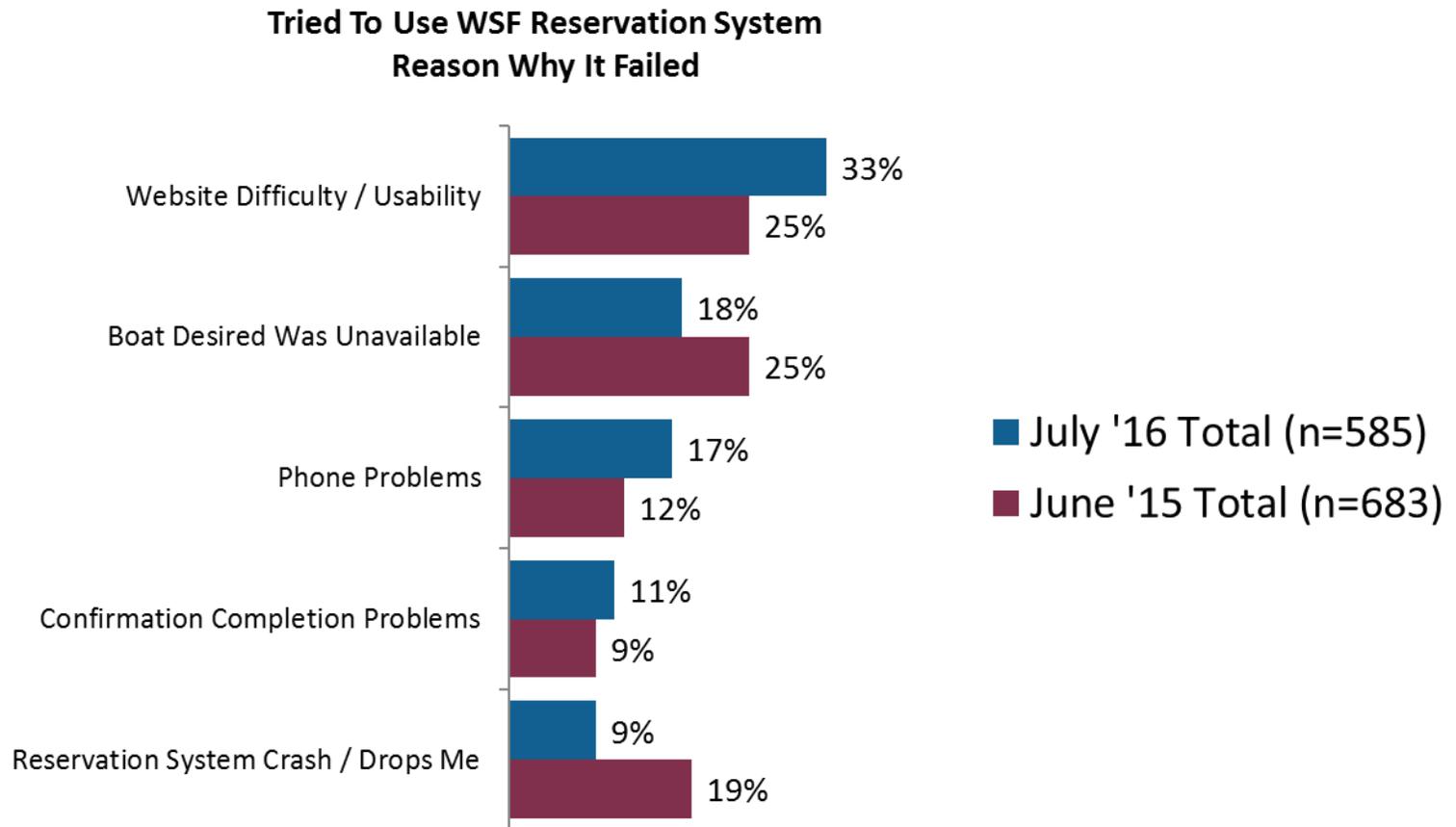
Reservation Problems/Issues

Of the 585 riders that had problems using reservations, 86% used the WSF website and 35% called WSF, with the majority reporting this activity happened in the last four months (63%). The problem was reported as the last time they used reservations in 51% of the cases.



Reservation Problems/Issues – Failure Issue

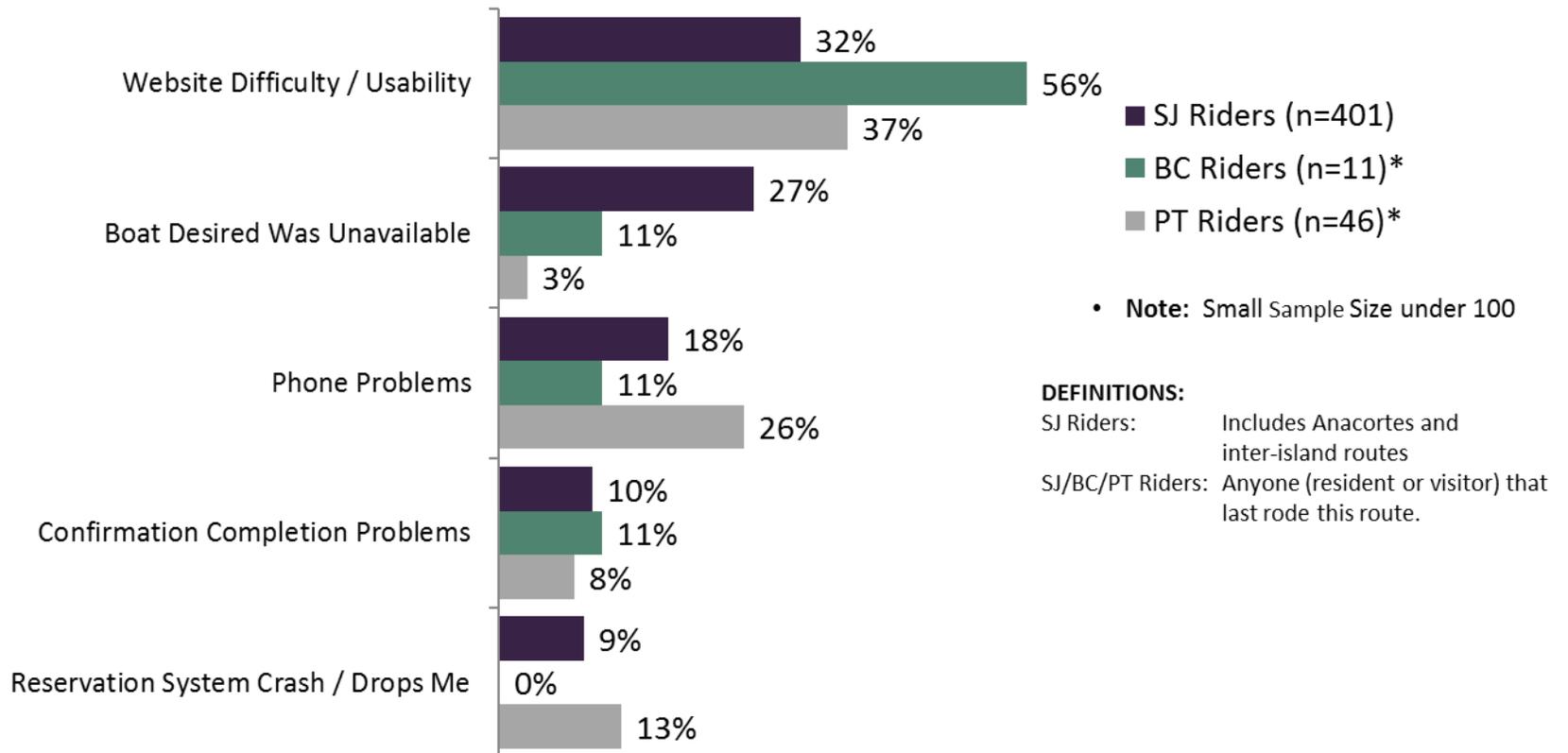
Of the 585 riders who had problems completing their reservation, the most mentioned reason was “Website Difficulty/Usability” issues (33%) and “Boat Desired Was Unavailable” (18%). The next reason for the reservation system failing them is “Phone Problems” (17%). Down ten percentage points as a failure reason is “Reservation System Crash.”



Reservation Problems/Issues – Failure Issue by Route

Of the 401 riders who last rode any of the San Juan routes, 32% reported “Website Difficulty / Usability” as the problem they had completing their reservation followed by “Boat Desired Was Unavailable” (27%).

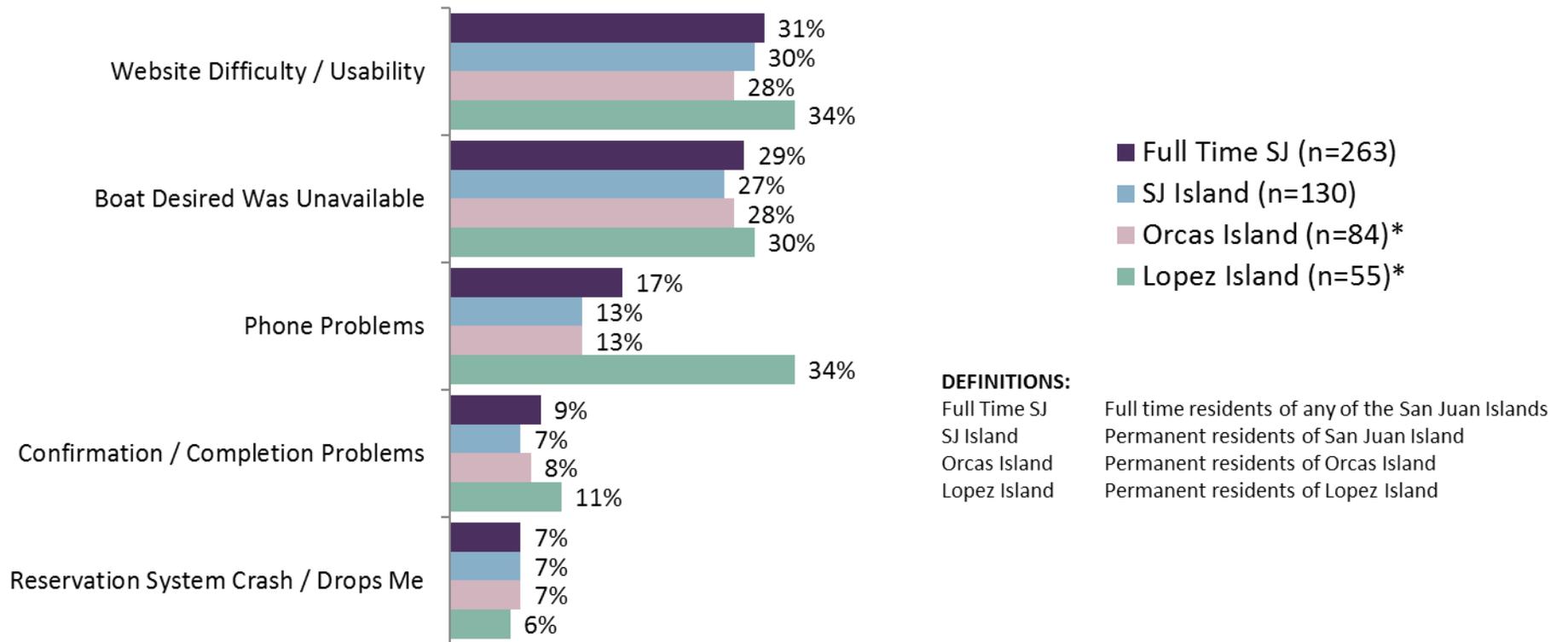
Tried To Use WSF Reservation System Reason Why It Failed By Reservation Route Rider



Reservation Problems/Issues – Failure Issue by SJ Resident

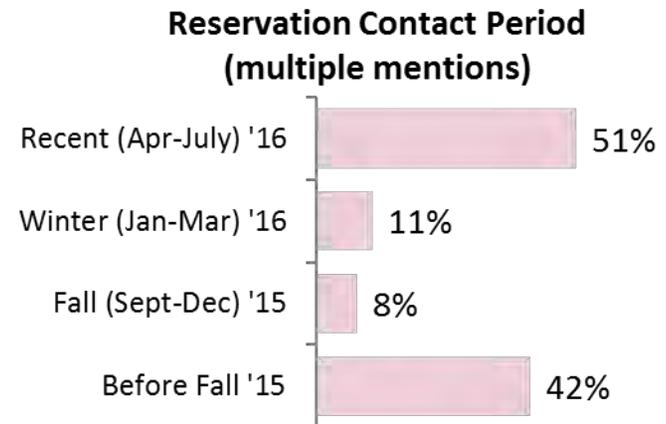
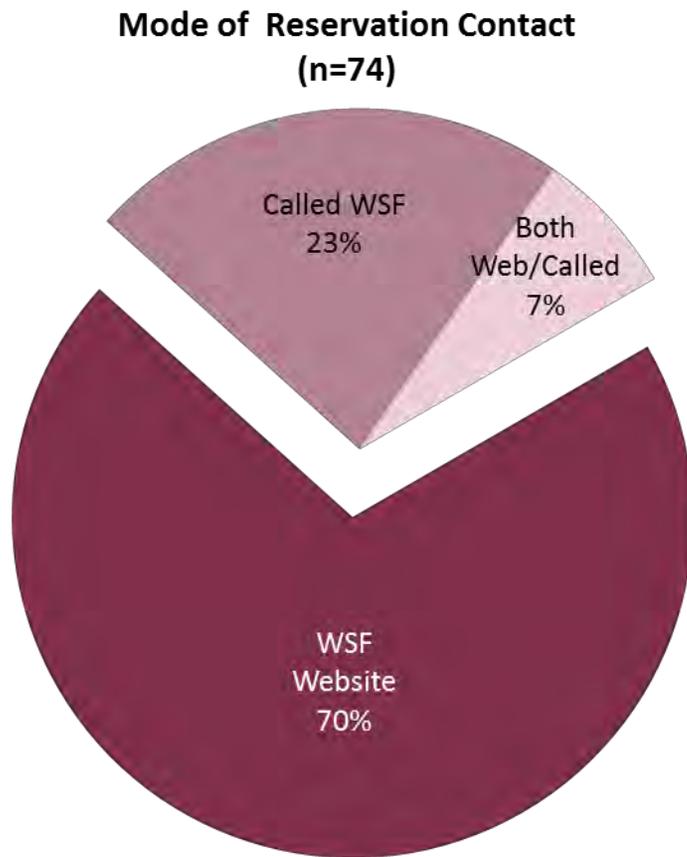
Of the riders who had problems completing their reservation, the most mentioned reason by the San Juan Island permanent residents was “Website Difficulty / Usability” (31%). Phone problems are reported statistically more often (34%) by Lopez Island residents than either residents of Orcas (13%) or San Juan Island (13%).

**Tried To Use WSF Reservation System
Reason Why It Failed By Full Time SJ & Island Residents**



Incomplete Reservations

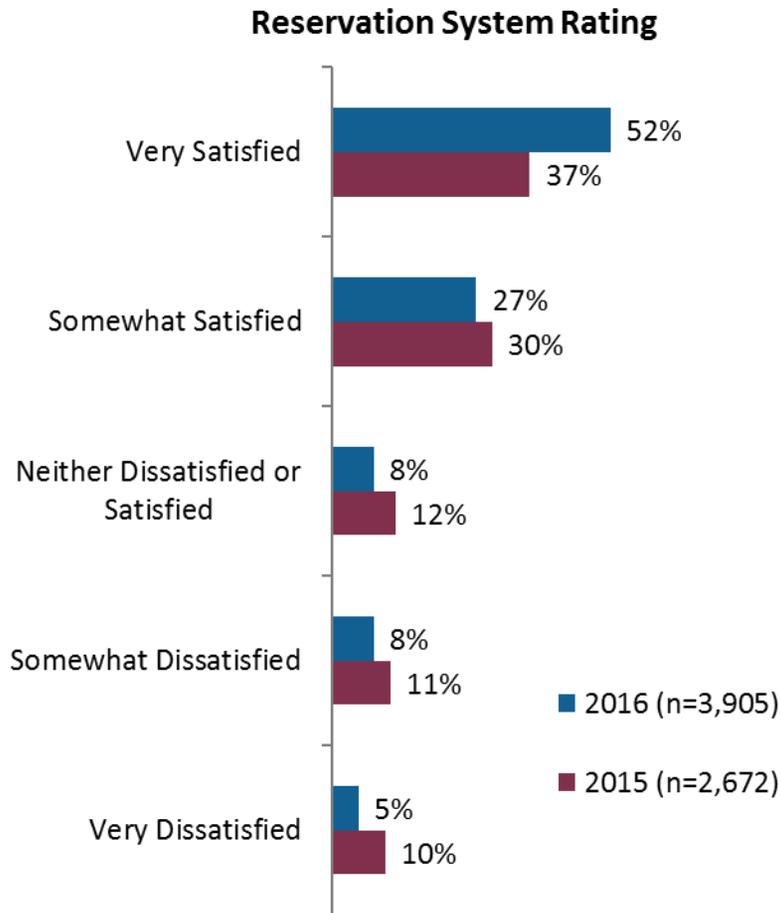
Of the riders that tried to use the reservation system, but never completed one, a large majority used the WSF website (77%). The major reason riders cited for incomplete reservations was their desired boat for transportation was unavailable (42%).



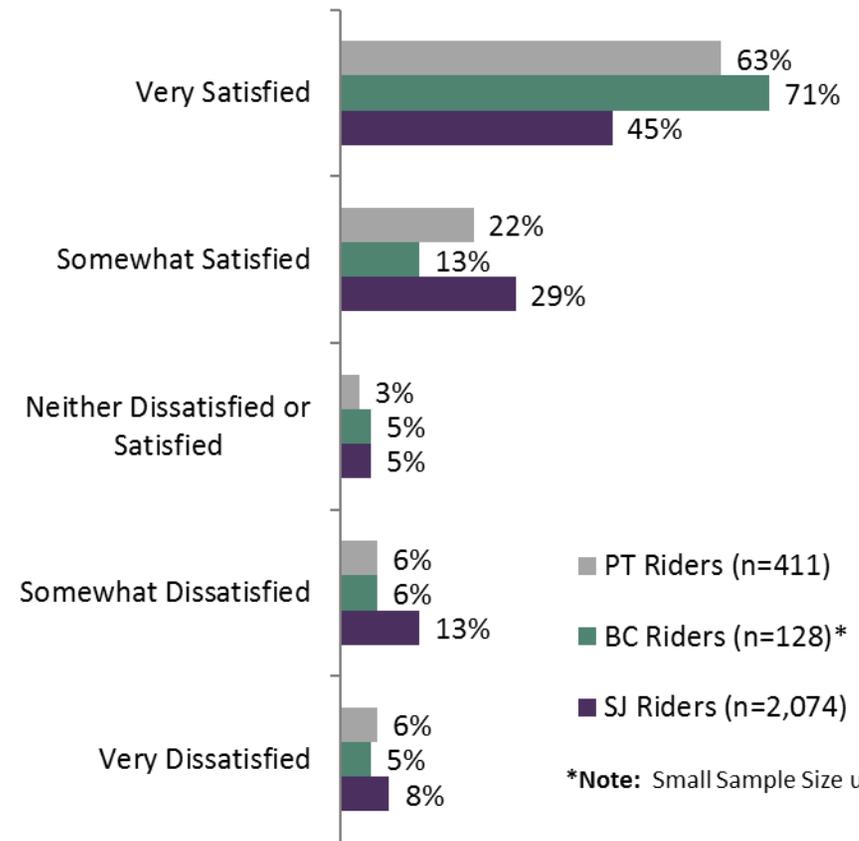
Top 5 Comments Given	
Boat Desired Unavailable	42%
Website Difficult / Usability	16%
Phone Problems	9%
Frustrating / Doesn't Meet My Needs	9%
Confirmation / Completion Problems	5%

Reservation System Satisfaction – Overall and by Last Route

Among riders that have used the reservation system, approximately four-in-five riders (79%) are satisfied with the system – a majority (52%) are “very satisfied,” a large increase from 37% in 2015. Riders along the Anacortes – Sidney BC (84%) and the Port Townsend – Coupeville (85%) routes are much more satisfied with the reservation system than rides among the San Juan route (74%).



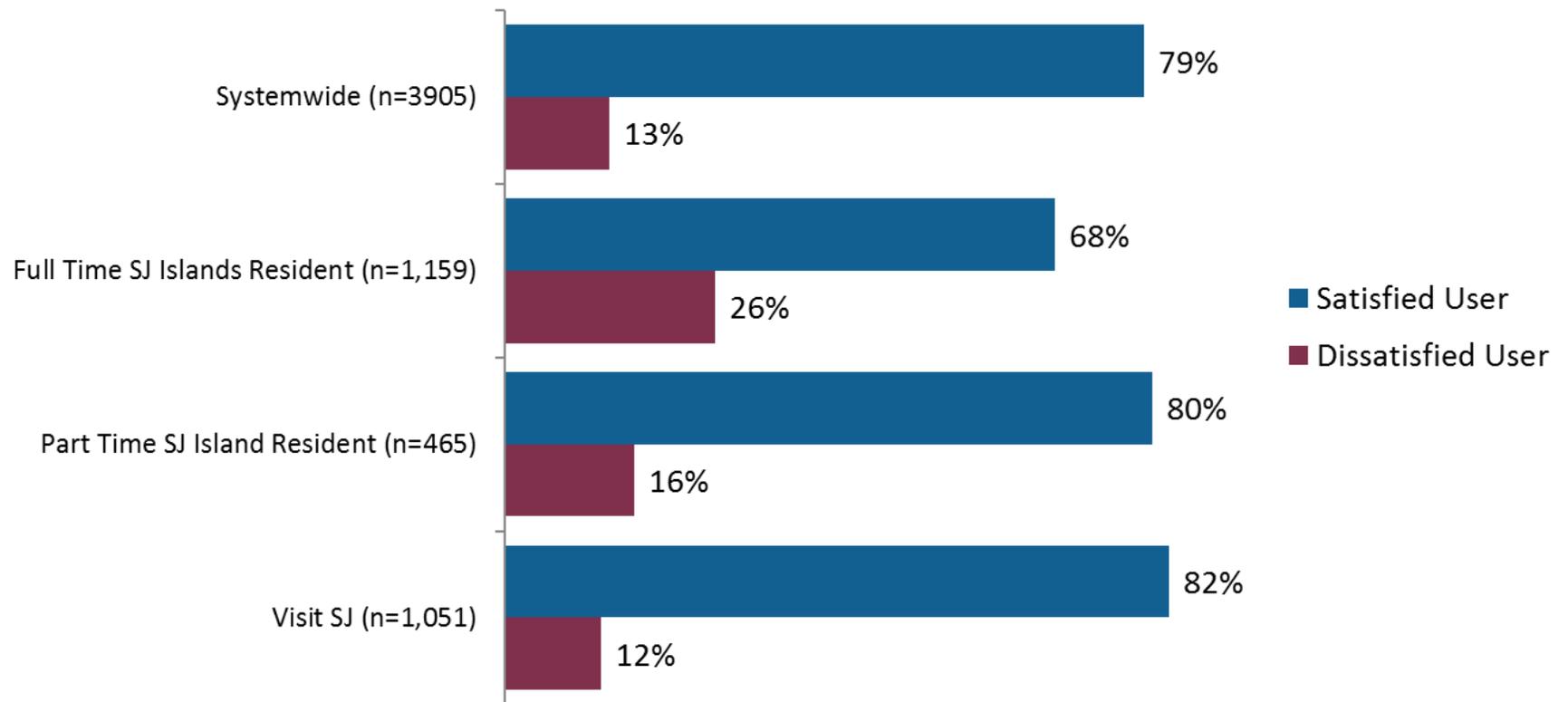
Reservation System Rating by Last Route Taken



Reservation System Satisfaction – By Resident/Visitor

System-wide thirteen percent (13%) of reservation users are dissatisfied with WSF reservation system. One in four (26%) full time San Juan residents who use the system are dissatisfied with it. In contrast 12% of San Juan visitors and 16% of part time San Juan residents who used the system are dissatisfied.

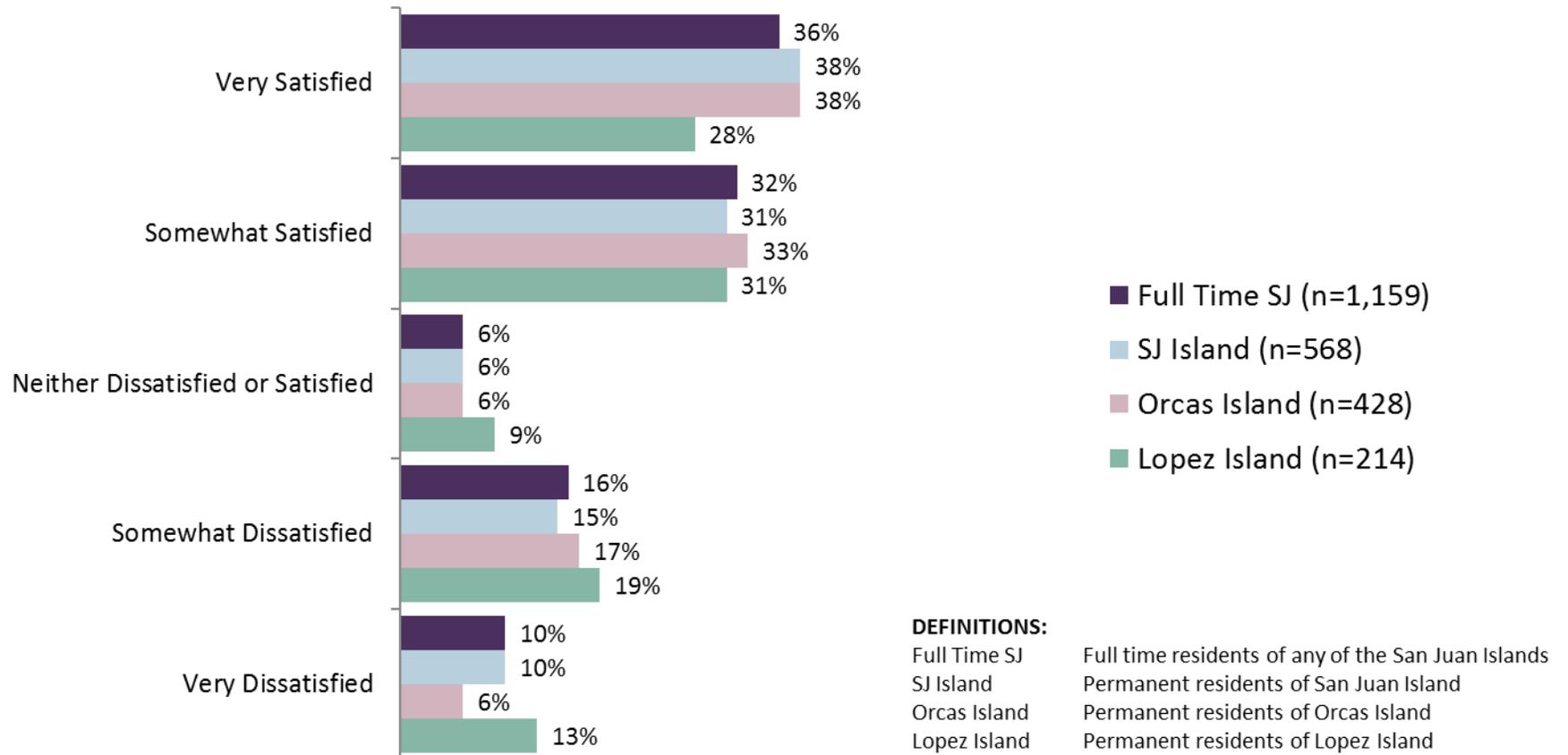
WSF Reservation System Satisfaction By Resident/Visitor



Reservation System Satisfaction – By SJ Resident

When broken out by the San Juan County residency, riders living on Lopez (32%) are the most dissatisfied (Very + Somewhat) followed by San Juan Island (25%) and Orcas Island (23%).

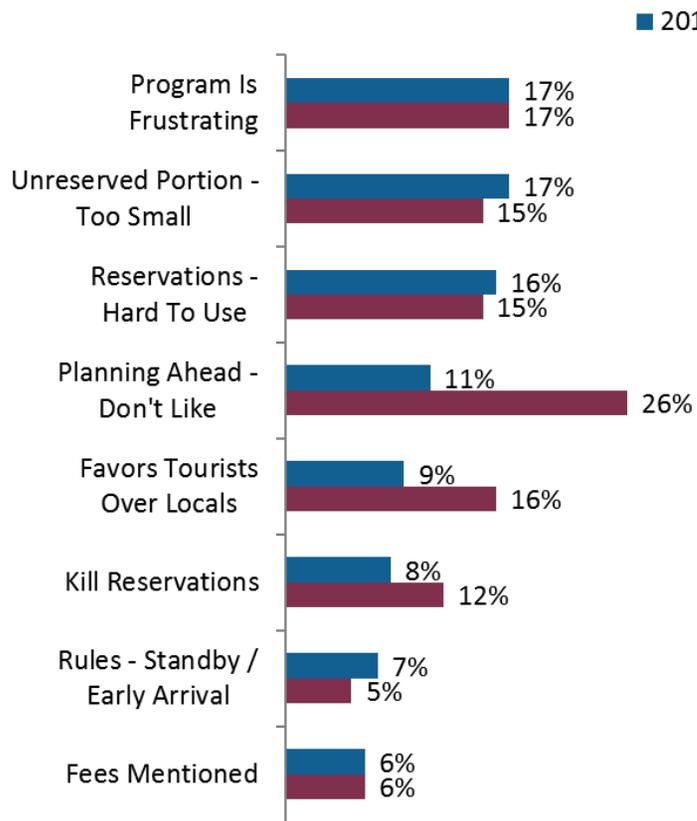
WSF Reservation System Rating - Full Time Resident By Island



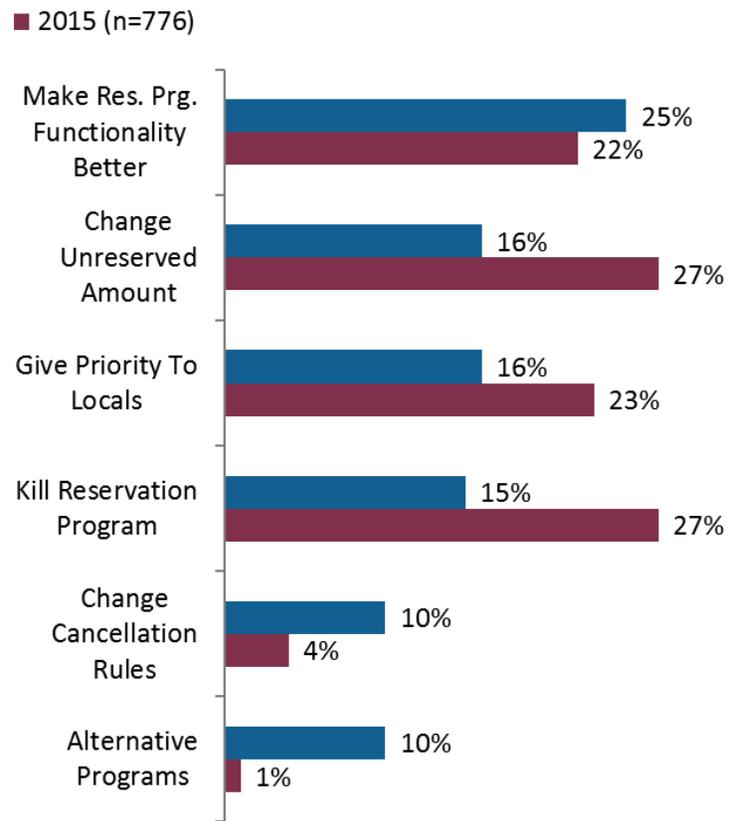
Reservation System Dissatisfaction - Overall

A total of 630 reservation system users are dissatisfied with the program. The most cited reasons for the dissatisfaction rating include “Program is Frustrating” (17%), “Unreserved Portion – Too small” (17%), and “Reservations – Hard to Use” (16%). Dissatisfied riders said to make the program better they would like to see the functionality of the reservations improved (25%). These suggestions were followed by “Change Unreserved Amount” (16%), “Give Priority To Local Residents” (16%) and “Kill Reservation Program” (15%).

**System Items Dissatisfied With
Top 8 Reasons**



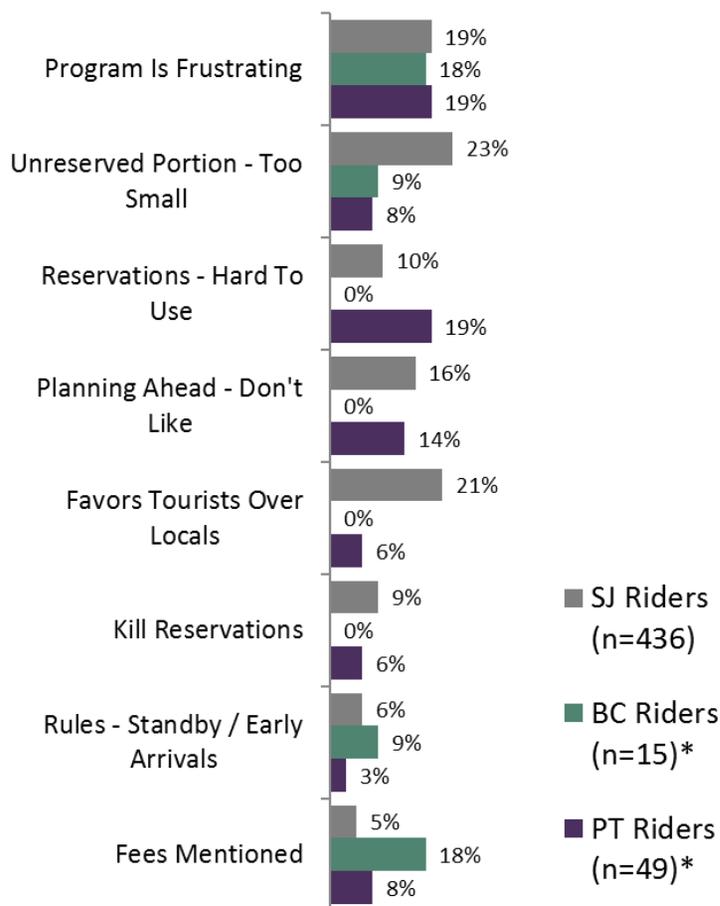
**Ways to Change the System to Work for Me
Top 6 Ways**



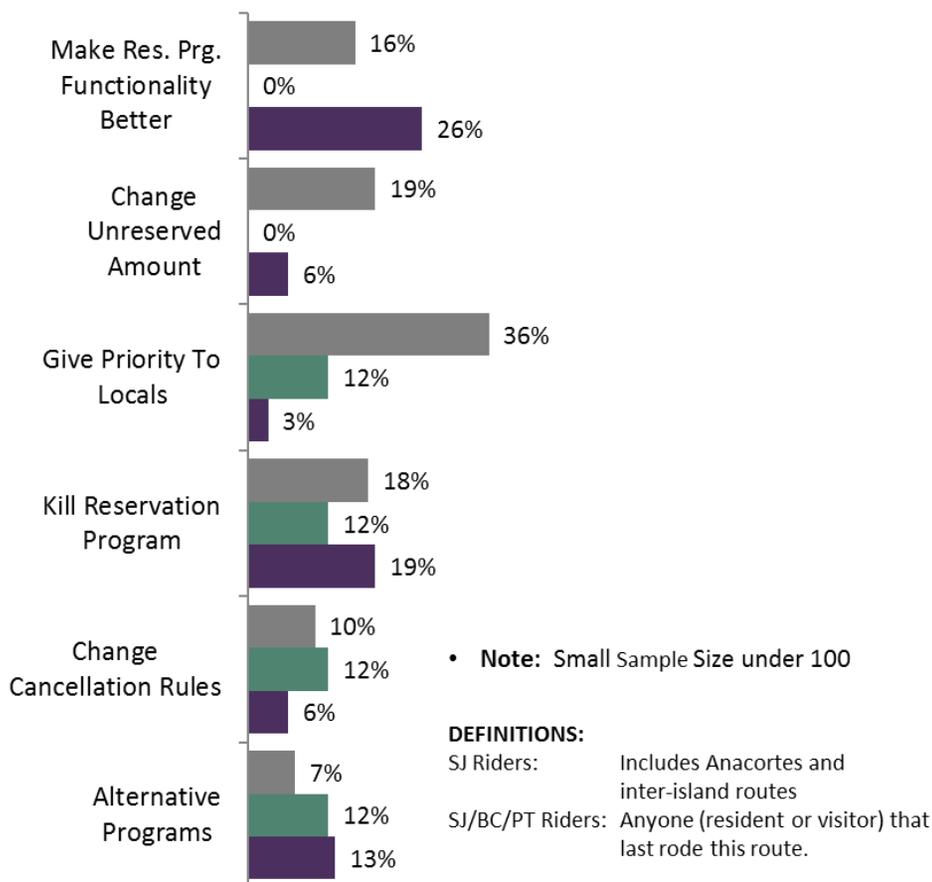
Reservation System Dissatisfaction – By Route

For riders on the San Juan Island routes, the most often cited reason for being dissatisfied with the reservation system is “Too Small Unreserved Portion” (23%) followed by “Favors Tourists Over Locals” (21%) and “Program Is Frustrating” (19%). Dissatisfied riders who used the San Juan routes said “Give Priority To Local Residents” (36%) and “Changing the Unreserved Amount” (19%) as the top two fixes to make the reservation system work better. Eighteen percent (18%) of those same riders said “Just Kill The Reservation Program.”

The Part Of The Reservation System I Am Dissatisfied With Is ...

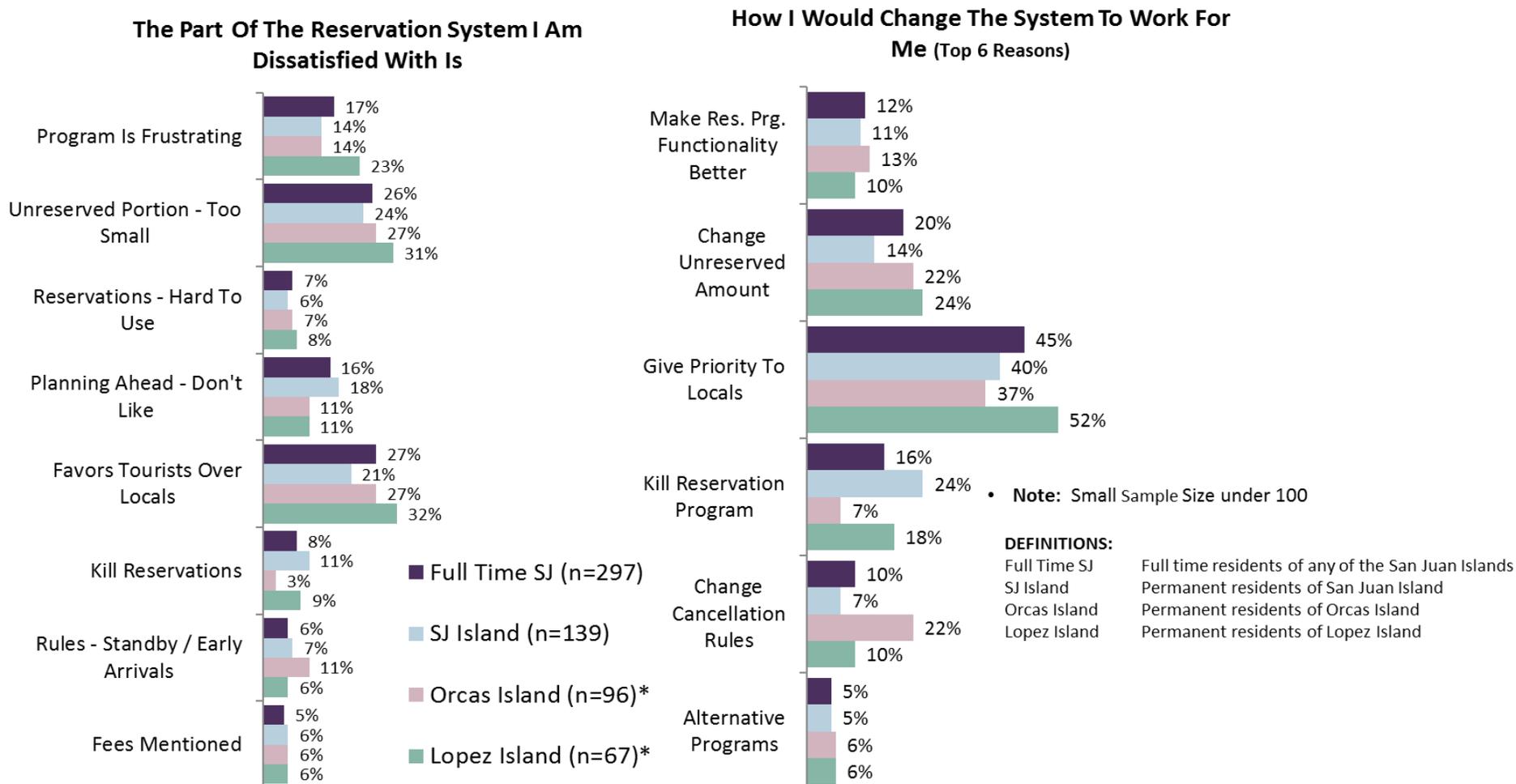


How I Would Change The System To Work For Me (Top 6 Reasons)



Reservation System Dissatisfaction – By SJ Island Residents

For full time San Juan County residents, the most often cited reason for being dissatisfied with the reservation system is “Favors Tourists Over Locals (27%) and “Too Small Unreserved Portion” (26%). Dissatisfied riders who live full time on any of the San Juan Islands said “Give Priority To Local Residents” (45%) followed by “Changing the Unreserved Amount” (20%) as the top two fixes to make the reservation system work better.



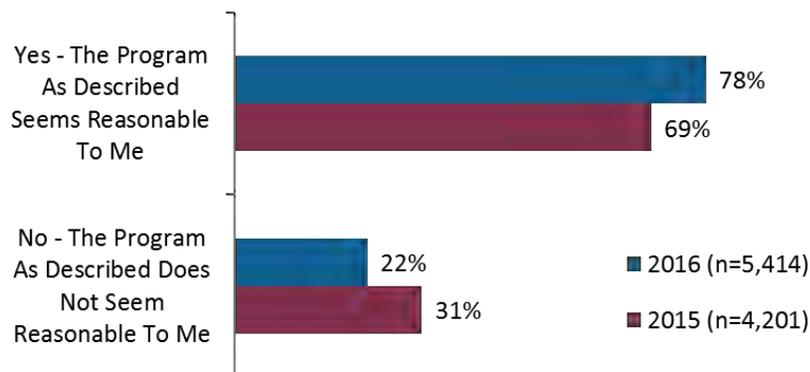
Reservation System Reasonableness

Respondents were provided a description of the current WSF reservation system. Overall, majority (78%) said the current program seemed reasonable to them, an increase from 69% in 2015. Respondents who ride along routes in the San Juan Islands are more likely to feel the current system is unreasonable (27%) compared to their counterparts who ride along the Anacortes – Sidney BC (11%) and Port Townsend – Coupeville (13%) routes.

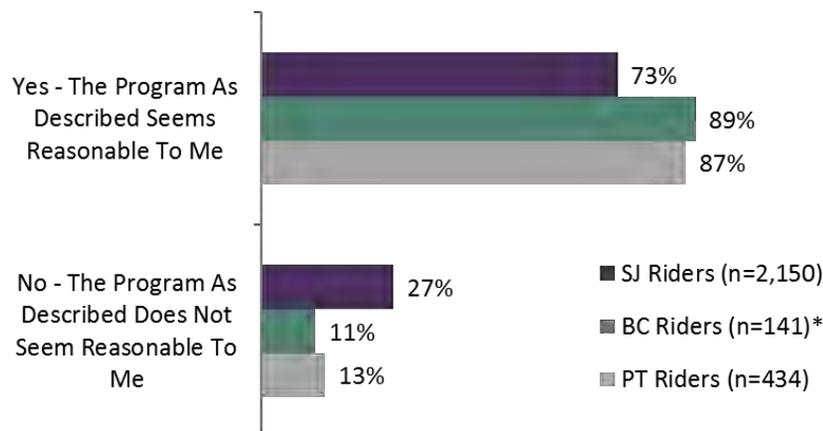
For Port Townsend/ Coupeville & Anacortes/ Sidney BC sailings:
 All reservations for a sailing schedule season are available two months prior to the start of the season. Up to 80% of the space on the Port Townsend route and 100% of the space on the Anacortes (99% on Sidney B.C.) route can be reserved.

For San Juan sailings:
 Reservations are available for up to 90% of the San Juan Island sailing space. Two months ahead of the sailing schedule season, 30% of the regular height space (typically general vehicles) and 100% of all tall height space (vehicles over 7'2" high or over 30' long – typically commercial vehicles/Motorhomes/RVs) becomes available for reservations. At 7 am two weeks prior to any individual travel day, an additional 30% of the regular height space becomes available. The remaining 30% becomes available at 7 am two days prior to the travel day.

Reasonableness of Reservation Program



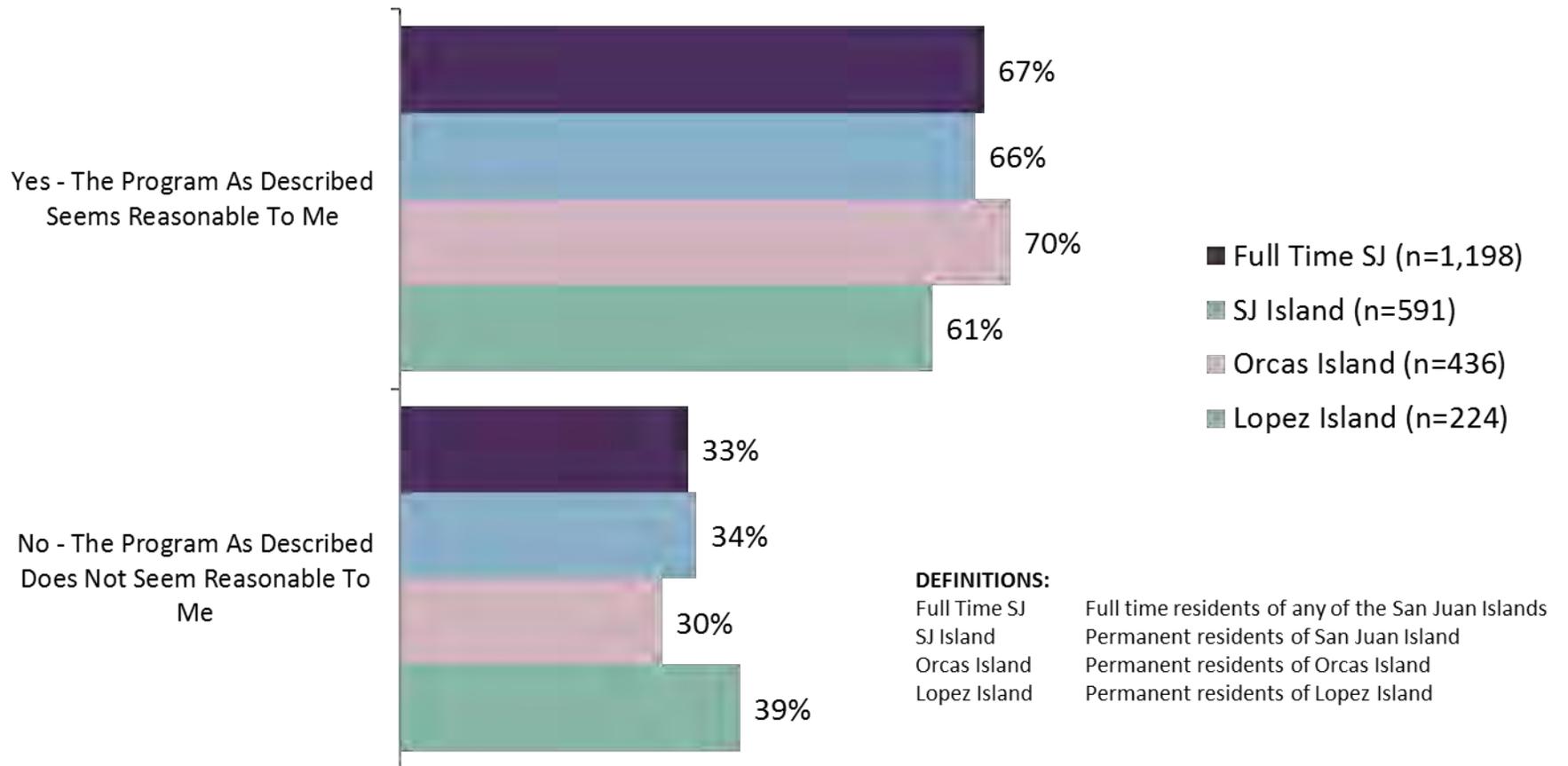
Reasonableness of Reservation Program By Reservation Routes Rode



Reservation System Reasonableness – by Residency

Based on residency, riders living on Lopez (39%) Island have the highest “unreasonable” response compared to the rest of the San Juan Islands.

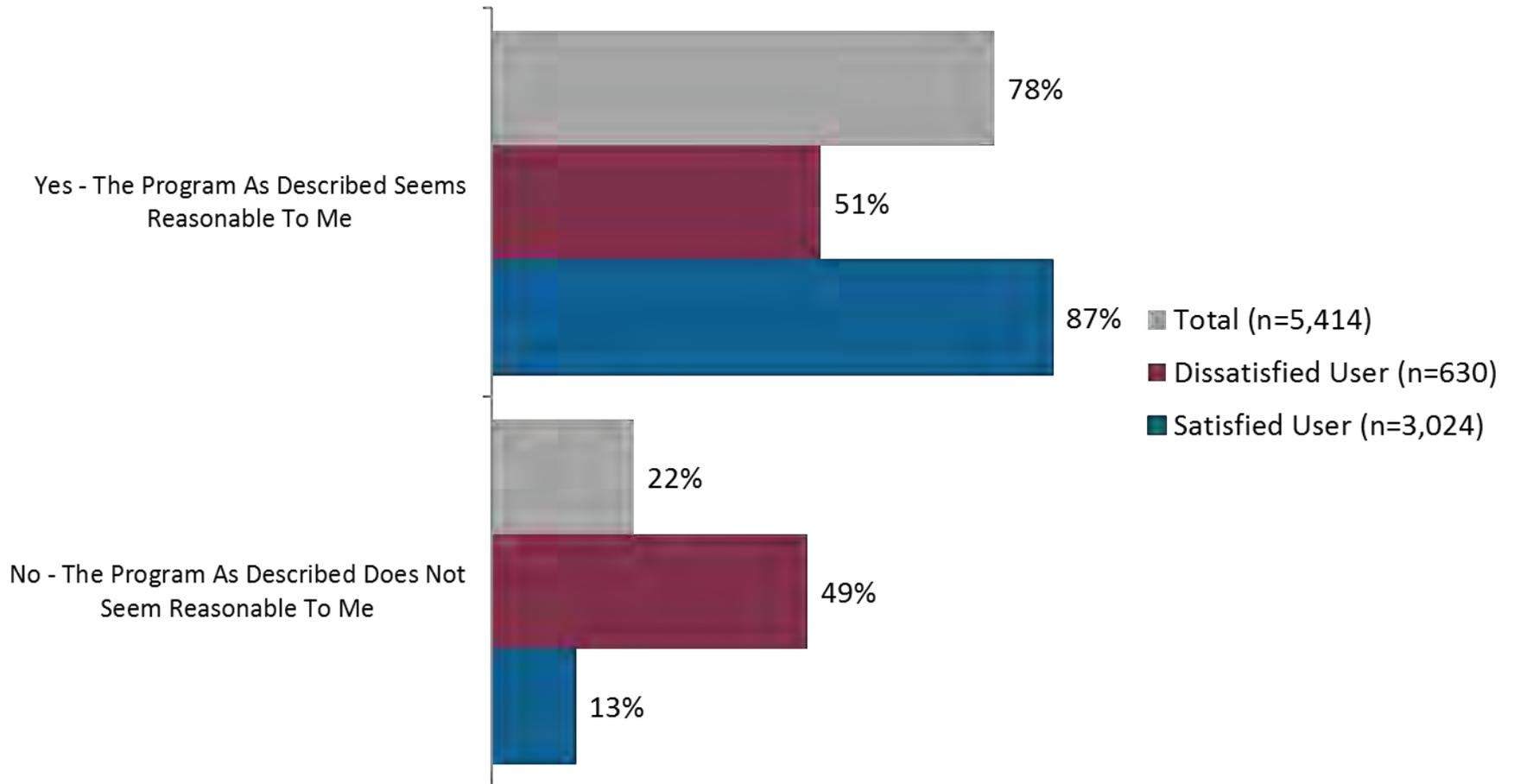
Reasonableness of WSF Reservation Program By Residency



Reservation System Reasonableness – by Dissatisfied Users

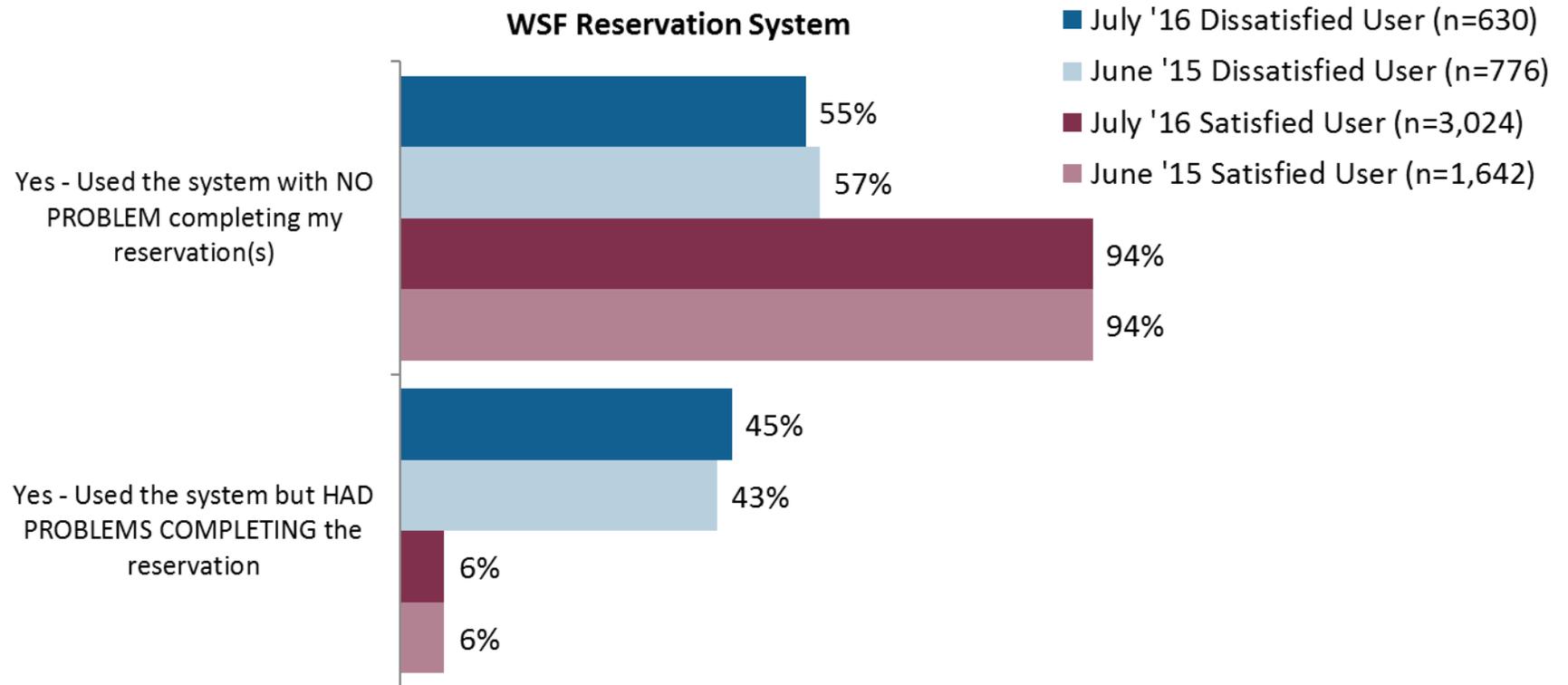
Fifty-one percent (51%) of dissatisfied reservation system users would say the program as described seems reasonable to them. In contrast, 78% of satisfied reservation users see the program as reasonable.

Reasonableness of WSF Reservation Program By Satisfaction Level



Reservation System Reasonableness – By Usability

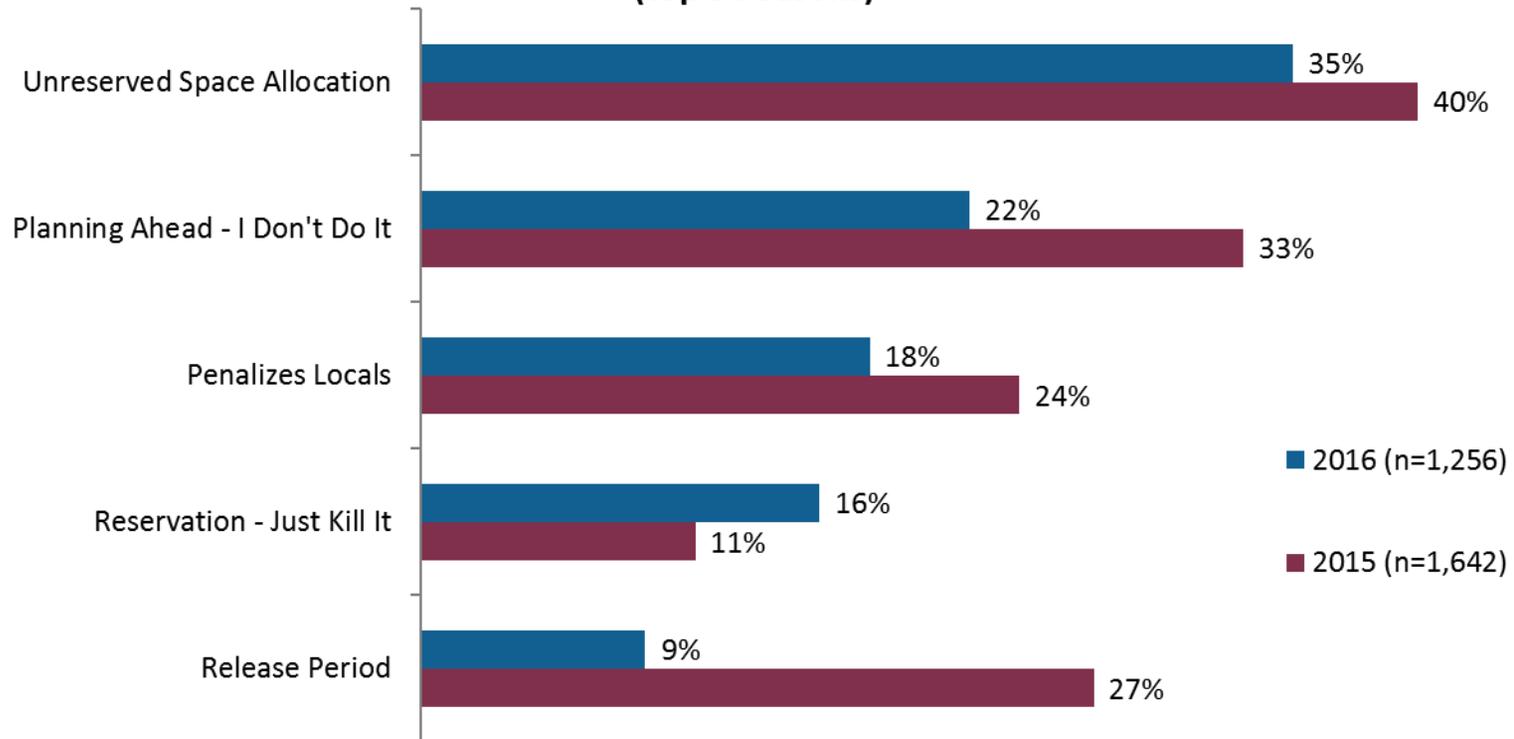
Riders’ dissatisfaction with the reservation program in both June 2015 and July 2016 is not completely linked to having had a problem completing a reservation. The study found a little over half (55%) of those dissatisfied with the reservation system, had no problems completing their reservation(s). In contrast, 9 in 10 (94%) of those satisfied with the reservation system had no problems.



Reservation System Unreasonableness Reasoning

Among respondents who thought the reservation was unreasonable, riders cited the “Unreserved Space Allocation” as the top reason (35%), consistent with 2015. “Release Period” was cited significantly less this year (9%) than in 2015 (27%).

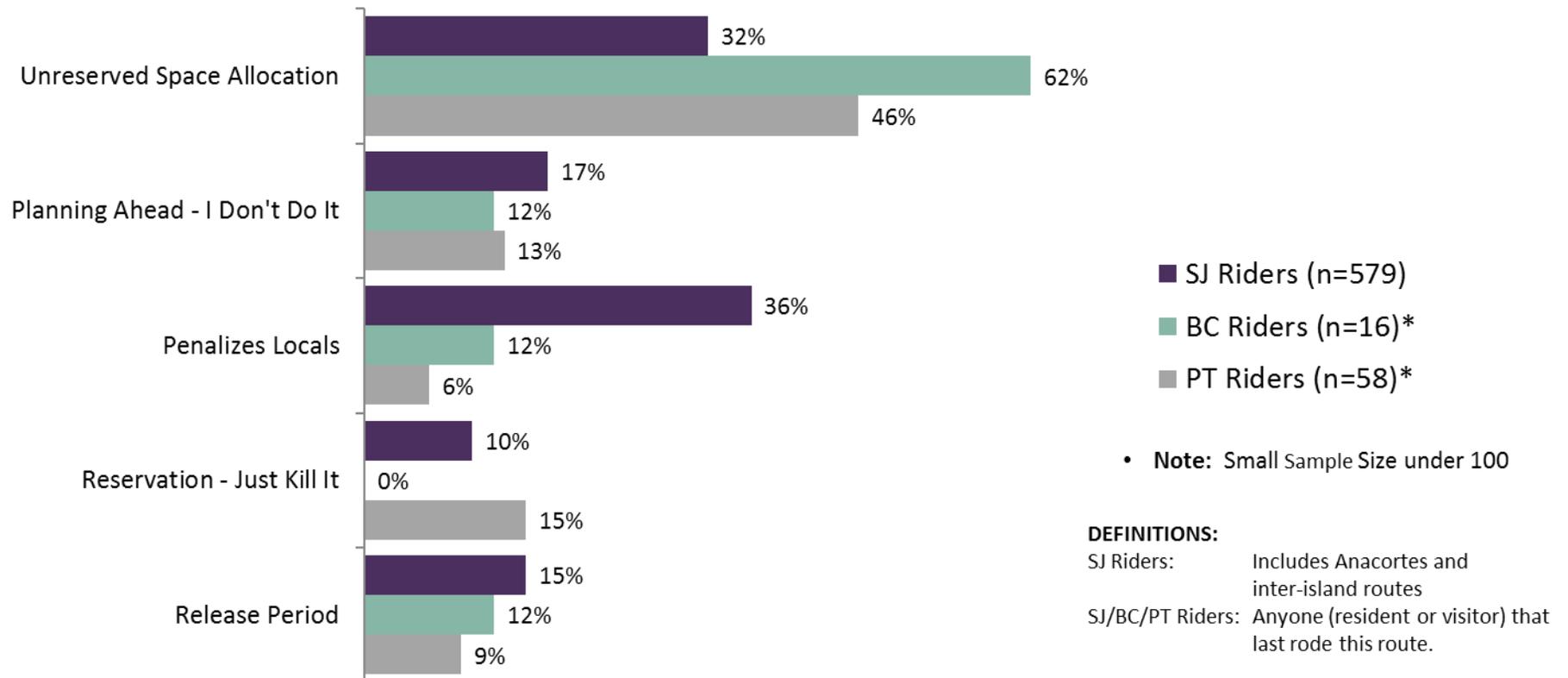
**The Parts Of The Reservation System That Are Unreasonable
(Top 5 Reasons)**



Reservation System Unreasonableness Reasoning – By Route

The major reasons for the reservation program as described being unreasonable cited by those that last rode the San Juan Islands routes were it “Penalizes Locals” (36%) and the “Unreserved Space Allocation” (32%).

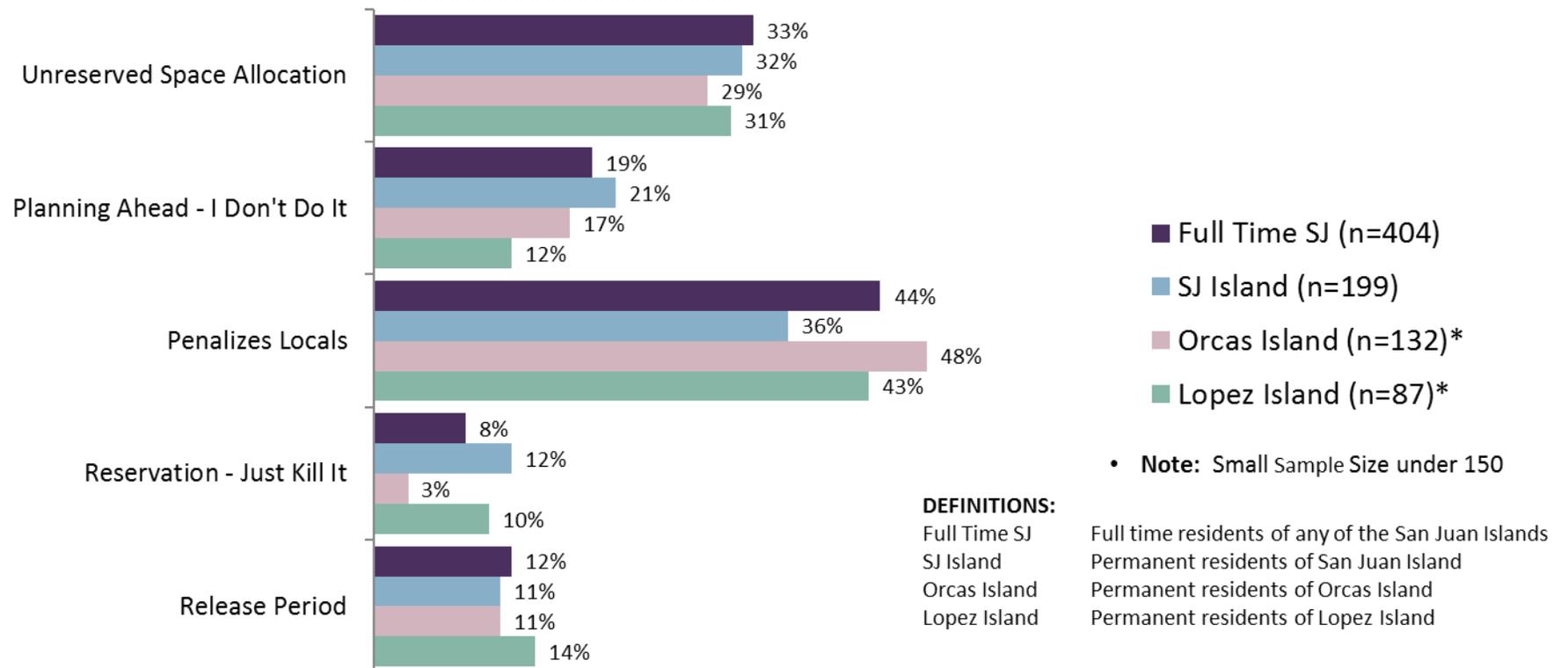
**The Parts Of The Reservation System That Are Unreasonable
(Top 5 Reasons)**



Reservation System Unreasonableness Reasoning – By Residency

When broken out by riders who are full time residents of the San Juan Islands, the top reasons for the reservation system as described being unreasonable are “Penalizes Locals” (44%) and the “Unreserved Space Allocation” (33%).

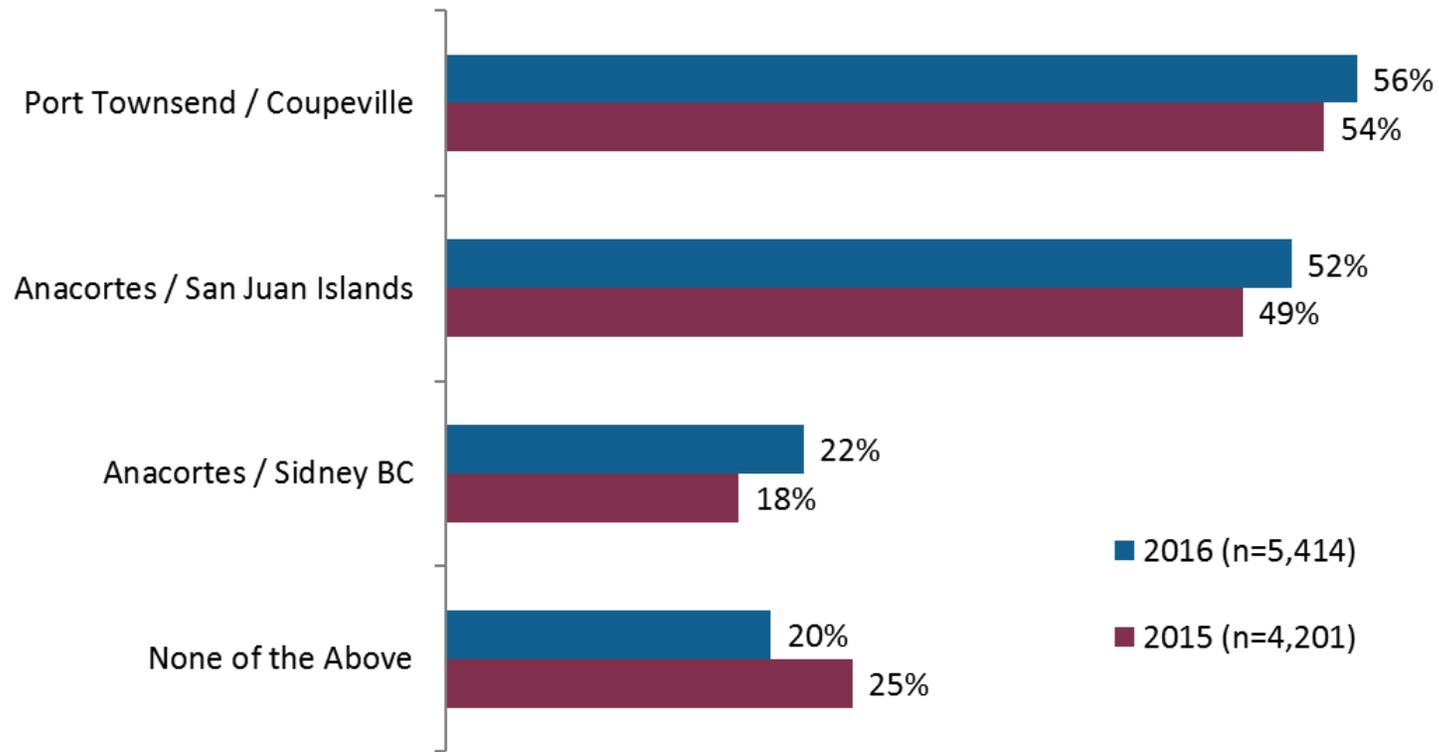
The Parts Of The Reservation System That Are Unreasonable (Top 5 Reasons)



Current/Future Use of Reservation Routes

When asking about the current reservation routes, a majority of riders say they have used, or will use, the Port Townsend/Coupeville (56%) and Anacortes/San Juan Islands (52%) routes. A small percentage of those surveyed have used, or will use, the Anacortes/Sidney BC route (22%). Approximately one-fifth (20%) of respondents say they have not used, or will not use, any of the reservation routes.

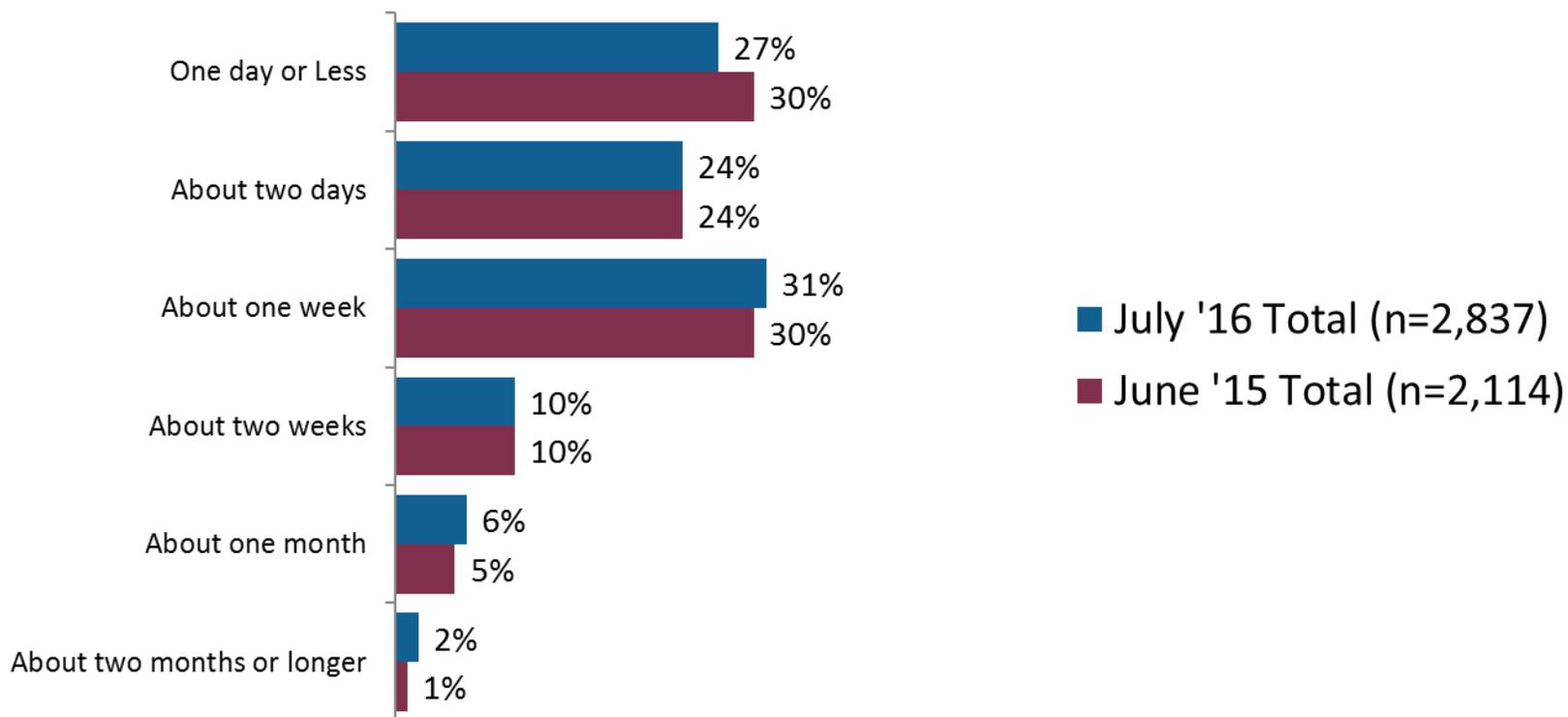
Used In Last 2 Years or Likely To Use In Next 2 Years



Advance Travel Notice – Port Townsend/Coupeville

The 2,837 riders who have taken or are likely to take the Port Townsend / Coupeville route were asked to describe their typical lead time before they need to take the ferry. About 31% know about one week in advance, followed by one day or less (27%), and two days (24%).

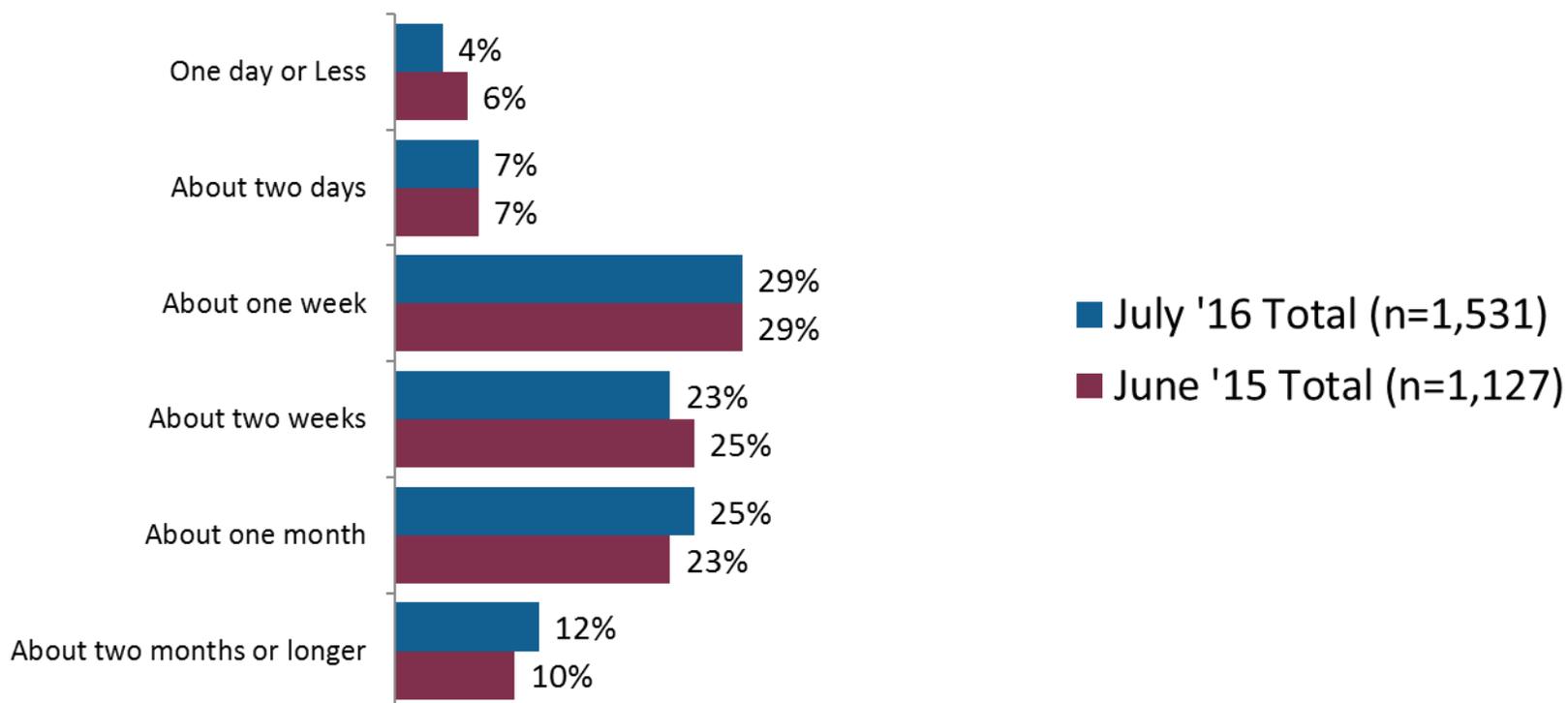
Port Townsend-Coupeville Travel - I Typically Know In Advance Of The Time/Date



Advance Travel Notice – Anacortes/Sidney BC

The 1,531 riders who have taken or are likely to take the Anacortes / Sidney BC route were asked to describe their typical lead time before they need to take the ferry. About 29% know about one week in advance, followed by one month (25%) and about two weeks (23%).

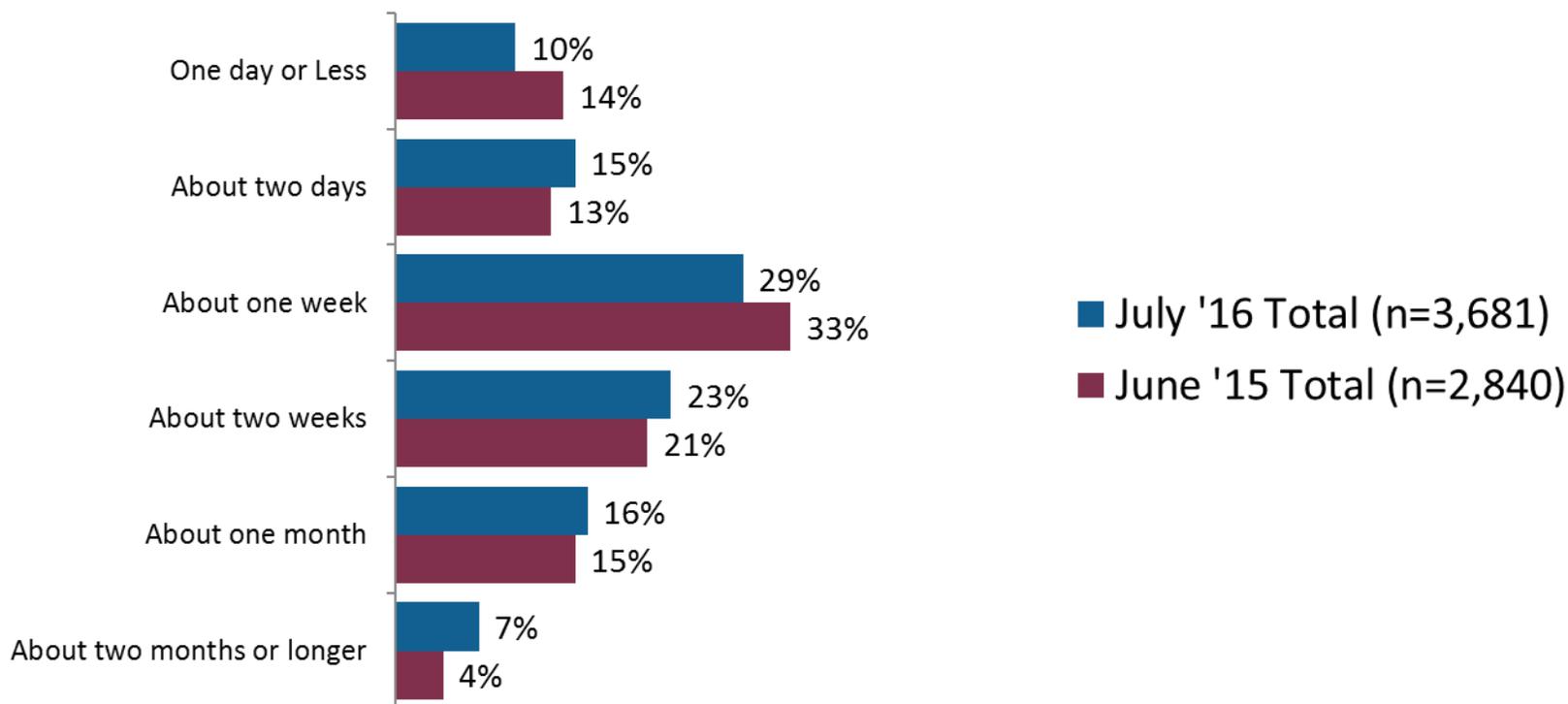
Anacortes-Sidney BC Travel - I Typically Know In Advance Of The Time/Date



Advance Travel Notice – Anacortes/San Juan

The 3,681 riders who have taken or are likely to take the Anacortes / San Juan Islands route were asked to describe their typical lead time before they need to take the ferry. About three in ten (29%) know about one week in advance, followed by about two weeks (23%) and about one month (16%).

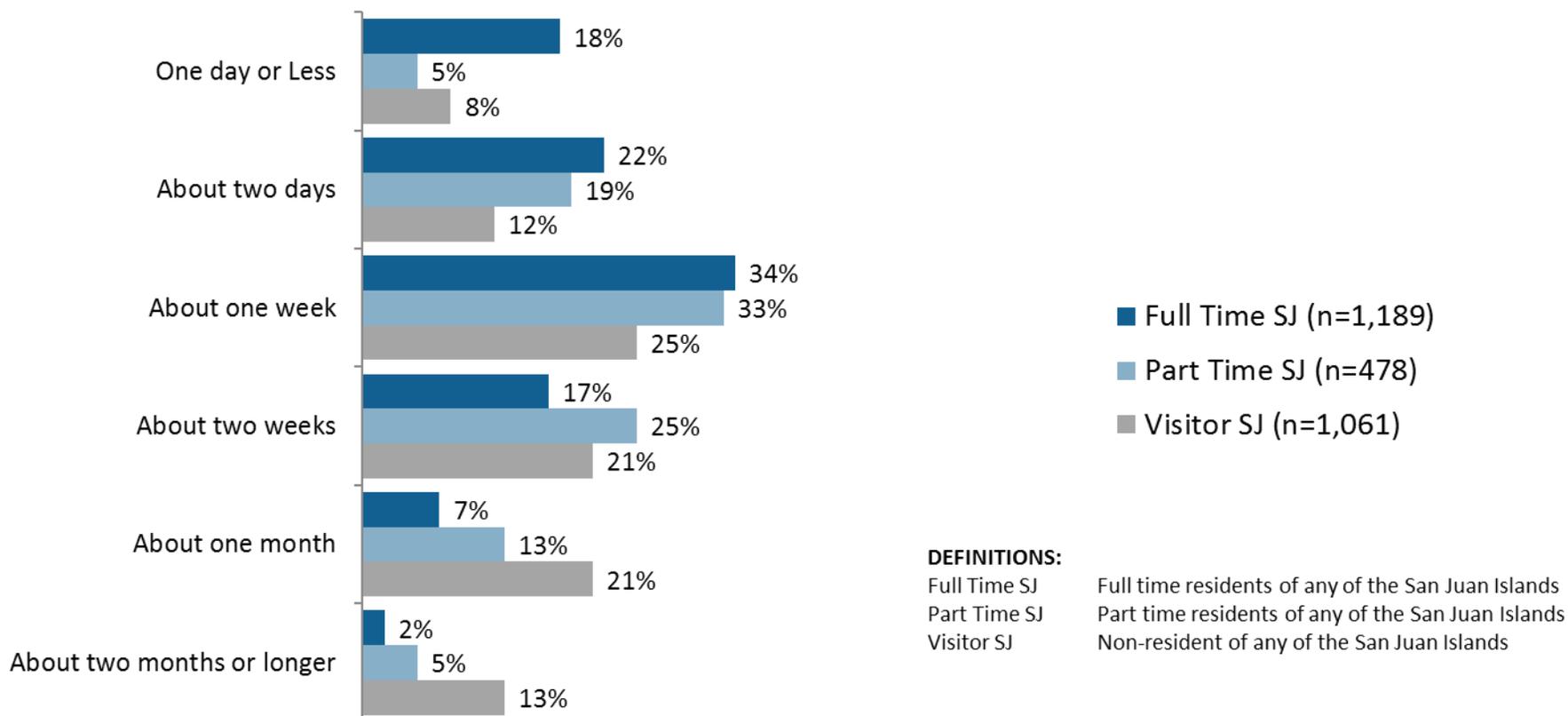
Anacortes-San Juan Islands Travel - I Typically Know In Advance Of The Time/Date



Advance Travel Notice – By Residency

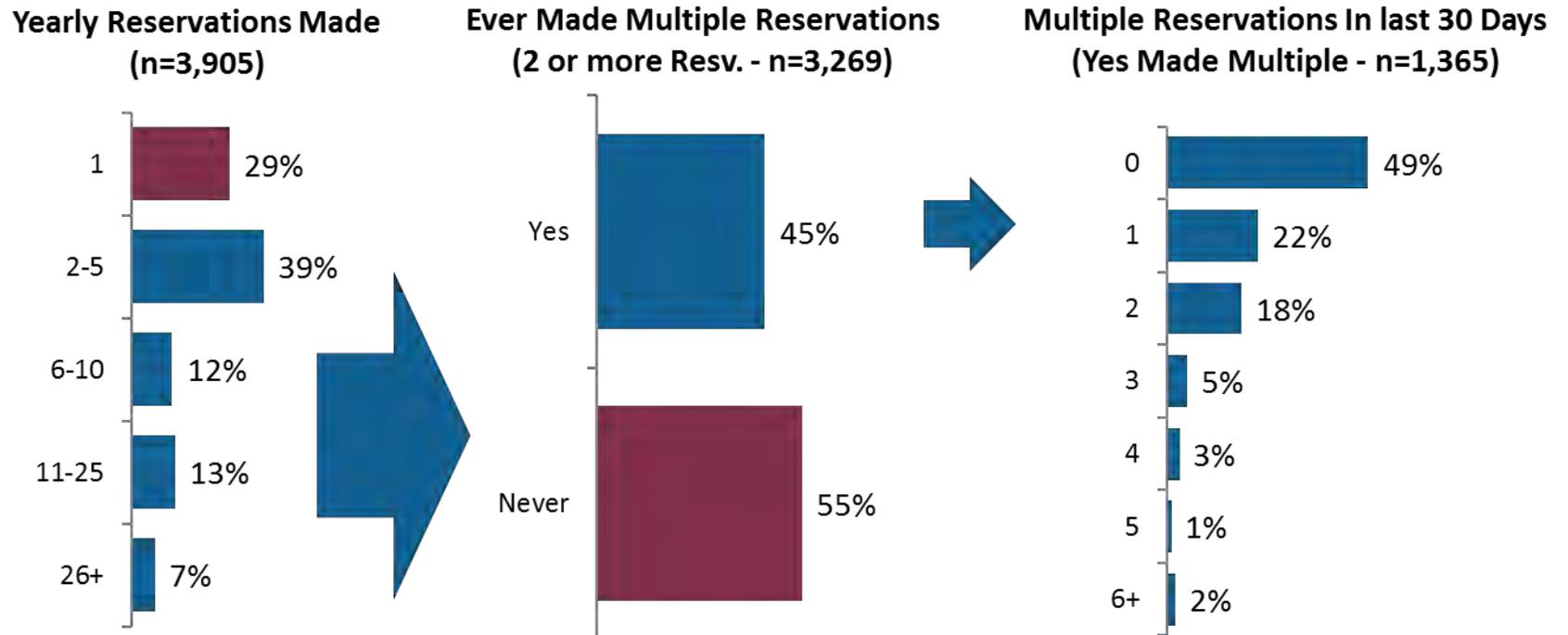
Full time and part time island residents along with visitors who have taken or are likely to take the Anacortes / San Juan Islands route were asked to describe their typical lead time before they need to take the ferry. Full time residents of the San Juan Islands (18%) are two to three times more likely to say they only know one day or less in advance compared to part time residents (5%) or visitors (8%).

Anacortes-San Juan Islands Travel - I Typically Know In Advance Of The Time/Date



Multiple Reservations

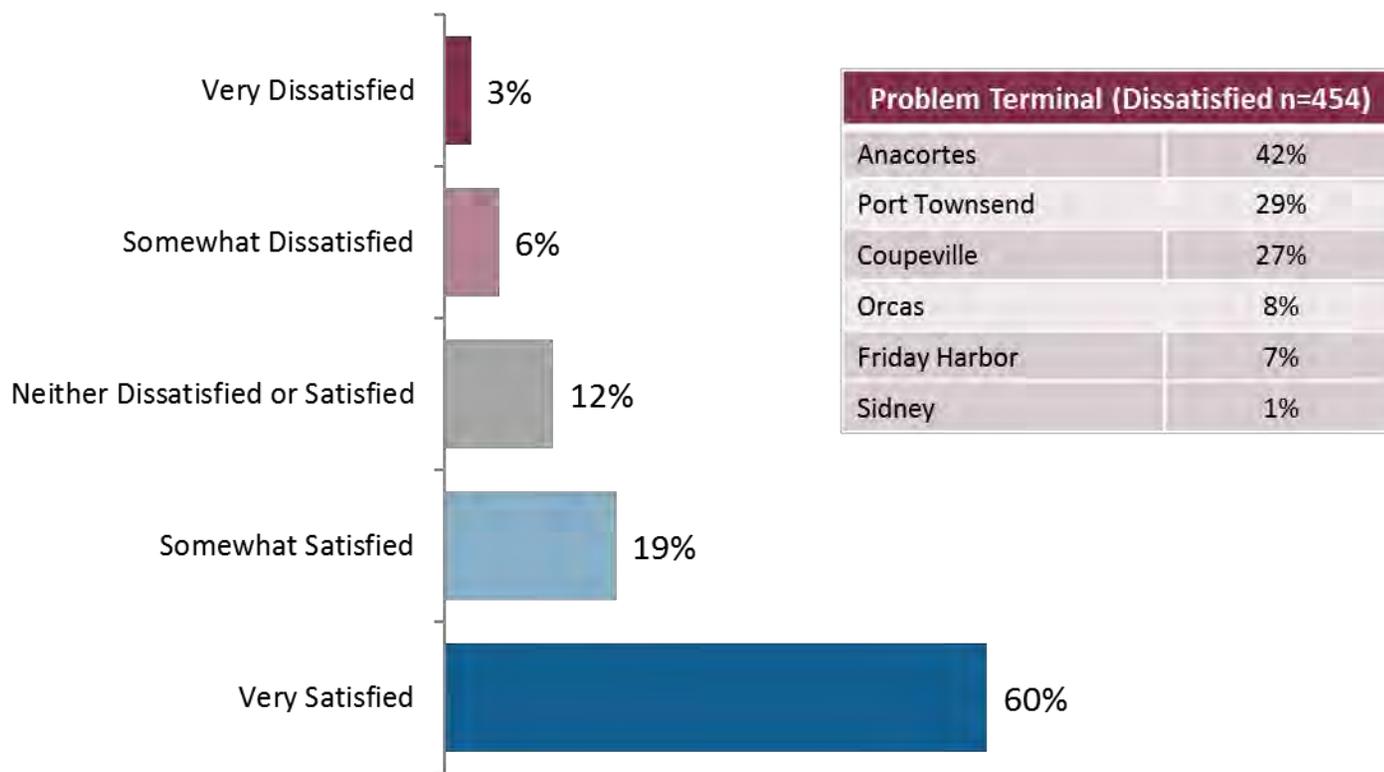
Riders surveyed made an average of 6.9 reservations per year. Among riders who have made two or more reservations, 45% of respondents have made multiple reservations for the same trip. Approximately half (49%) of those who made multiple reservations reported they have not done so in the last 30 days.



Terminal Staff and Reservations

A majority of riders (79%) that have used the reservation system are satisfied with the customer serve they receive at the terminal. Among the 9% who say they are dissatisfied, a plurality mentions the Anacortes (42%) terminal.

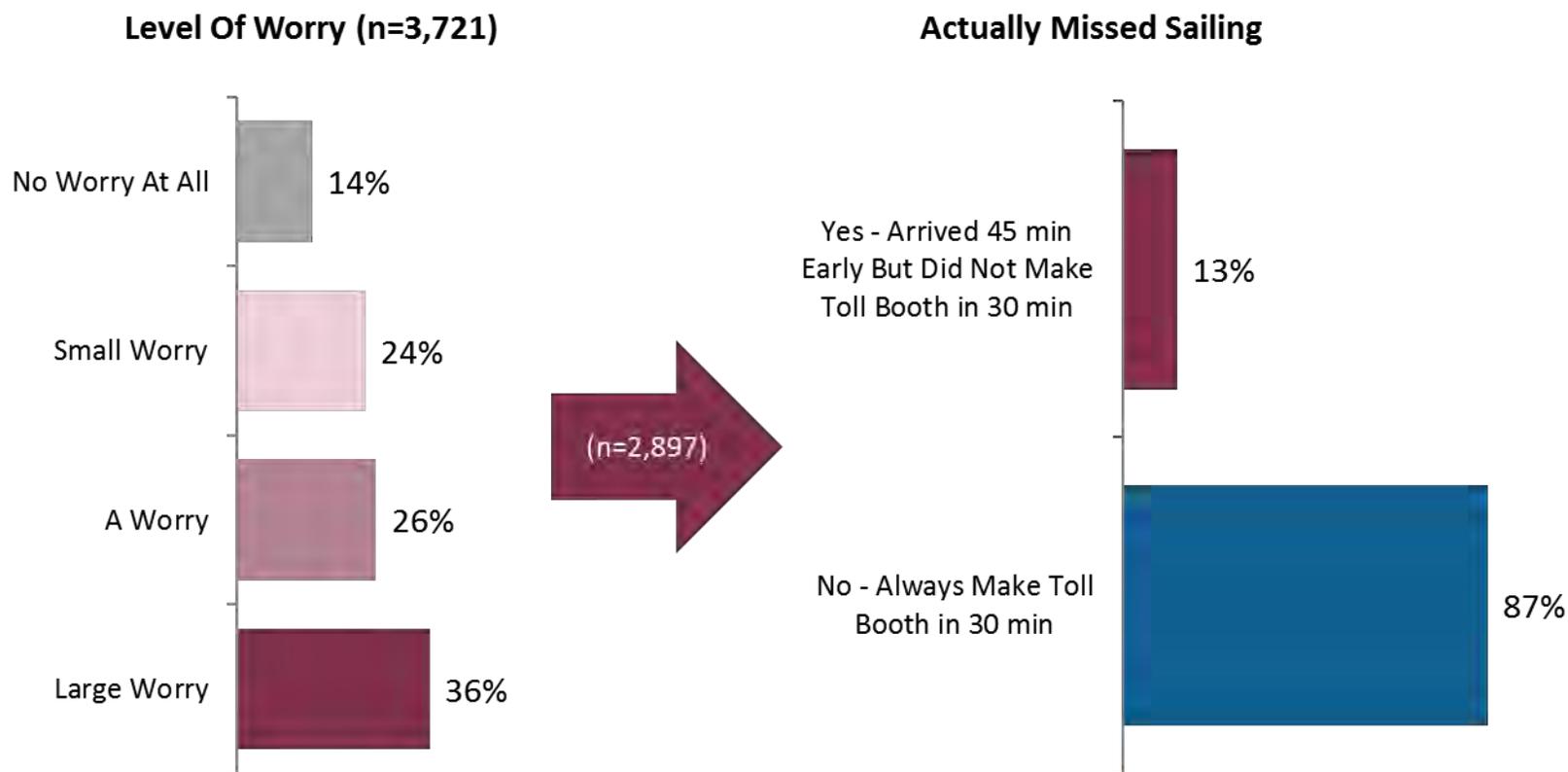
Terminal Staff Reservation Handling Rating (n=3,905)



Reservation Check-In Issues

At Anacortes, Friday Harbor, and Orcas Island, vehicles with reservations must check in at the toll booth at least 30 minutes prior to their departure time. Drivers are encouraged to arrive at the end of the line 45 minutes prior to their reserved departure time so that they reach the toll booth within 30 minutes of their reservation.

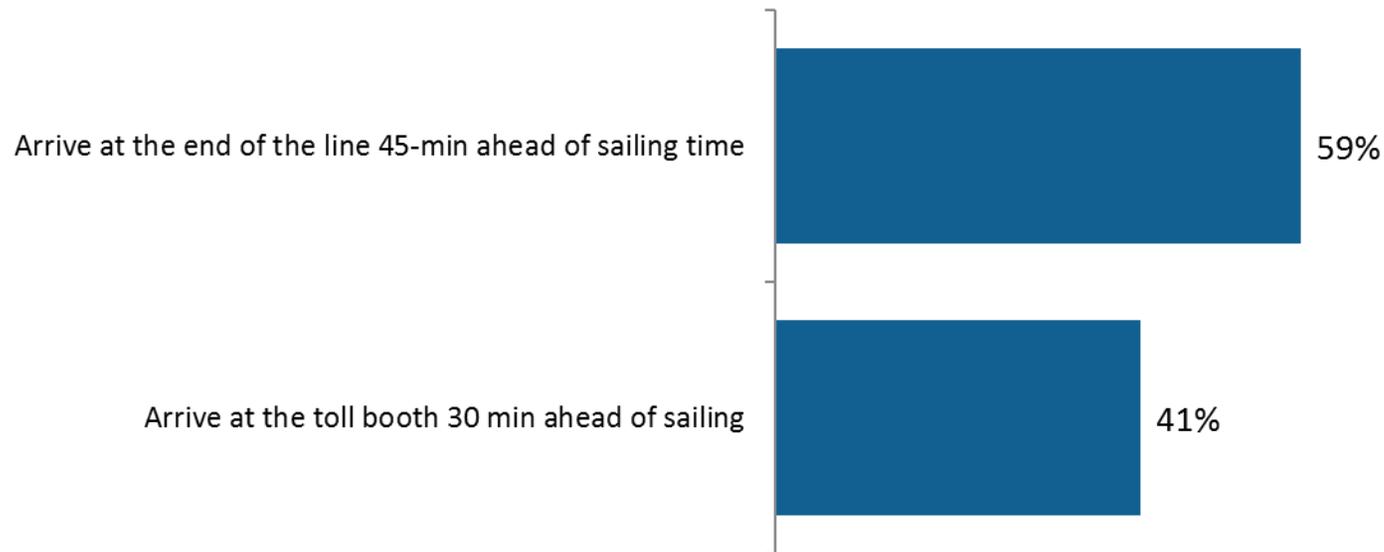
Among riders who have used the reservation system along these routes, about one-third (36%) say making the toll booth in time is a large worry, while a majority (62%) say it is either a worry or large worry to them. However, only one-in-ten respondents (13%) have actually missed their scheduled sailing.



Reservation Check-In – Determine On-Time Arrival

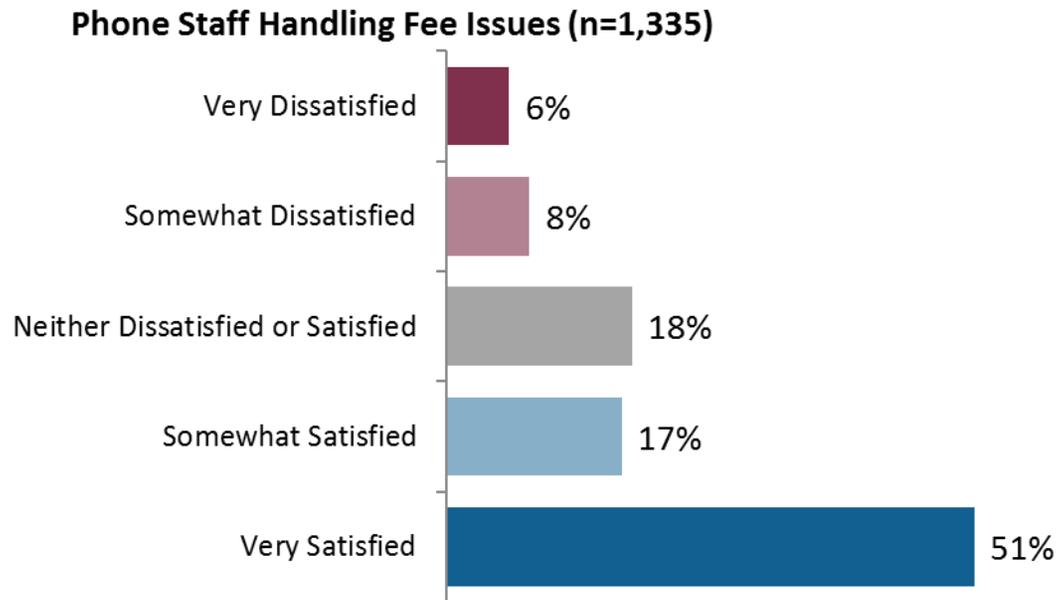
The 3,721 riders who have used the WSF reservation system from Anacortes, Friday Harbor, or Orcas Island were given two choices and asked to select which they felt WSF should use to determine if you have arrived within time. Six in ten (59%) said it should be based on their arrival at the end of the line 45 minutes ahead of sailing time.

Determine “On-Time” Arrival, If You ...
(n=3,721)



Phone Staff Handling Fee Issues

The 1,335 riders who have used the WSF phone staff to handle reservation issues and no-show fee reversals were asked how they would rate the customer service of the phone staff. Fourteen percent (14%) are dissatisfied with how they were handled. Full time San Juan Islands residents (20%) are more likely to be dissatisfied with the phone staff handling of fee issues than part time San Juan Islands residents (12%) or San Juan Islands visitors (10%). Lopez Island residents (25%) are more likely to be dissatisfied with the phone staff than either San Juan (21%) or Orcas (17%) Island residents.

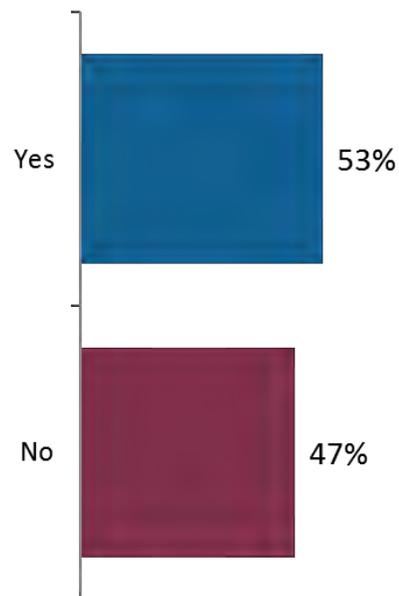


No Show Fees and Multiple Reservations

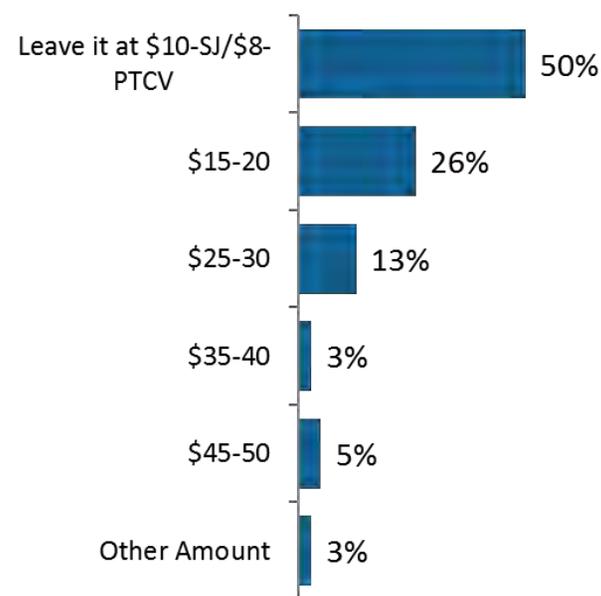
Those riders that have used the reservation system were shown the below background description on the impact of making multiple reservations for the same trip and asked if the no-show fees should be raised. Just over half (53%) said the no-show fees should be raised to \$23 (on average). However, half (50%) of all respondents suggest the fee should remain where it is - the average amount for a no-show fee among all respondents to be raised to is \$17.

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.

Increase No-Show Fees (n=3,905)



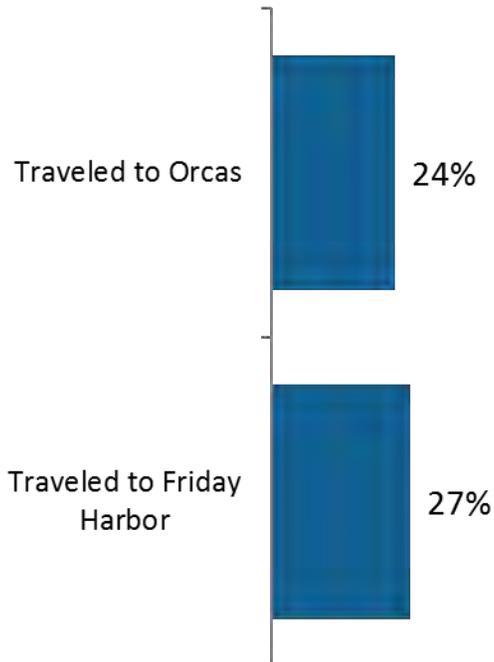
Suggested Amount (n=3,905)



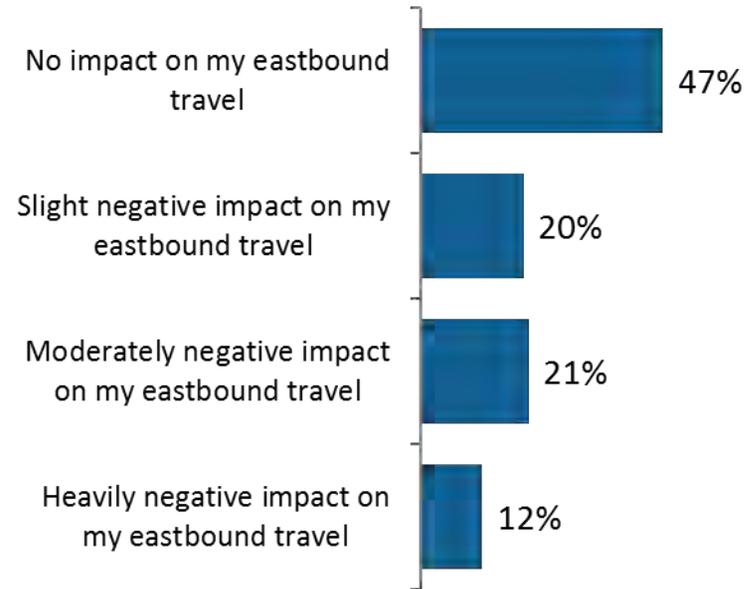
Eastbound Reservations Impact

For the 2,272 riders who have traveled eastbound from Orcas and/or Friday Harbor, about half (53%) say the lack of available eastbound reservations has impacted their ability to travel off of those islands. Full time (70%) and part time (69%) residents of San Juan Islands report being more impacted than visitors (44%) to San Juan Islands.

Traveled to Orcas / Friday Harbor (n=3,905)



Level of Impact On Travel for Those Traveling Eastbound from Orcas / Friday Harbor (n=2,272)



*Ferry Riders Opinion Group Winter/Summer Survey
Participant Characteristics – Summary*

Ferry Riders Opinion Group Winter/Summer Survey Participants Characteristics - Summary

Contains information regarding:

- ❖ Respondent demographics
- ❖ Weighting schemes

Information gathered from the following surveys*:

Winter Rider Survey

F.R.O.G. panel

Summer Rider Survey

F.R.O.G. panel

*More detailed information in the form of full reports, data tables and questionnaires can be found on the accompanying CD.

Key Findings:

Eight in ten (84%) have been riding ferries for over 10 years. Approximately two thirds of FROG members surveyed live within 10 miles of a ferry terminal.

Those responding to the surveys tend to be older, with the majority above the age of 55.

A majority of respondents are female in the Summer Panel, while a narrow majority of Winter respondents are male.

As in 2010, the majority of Winter respondents are employed full time – a plurality are full time workers in the Summer Panel. For both panels, about a third of respondents are retired.

Annual household income for ferry riders is weighted towards the higher end, with a near majority earning over \$75,000.

Ferry Ridership Characteristics – Detailed Findings

Demographic Information – Winter and Summer Survey Participants

Eight in ten have been riding ferries for over 10 years. Approximately two thirds of FROG members surveyed live within 10 miles of a ferry terminal.

Years Riding WSF	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	4,827	3,105	3,208	3,420	1,680	1,676	4,254	4,171
< 1 year	1%	1%	1%	0%	0%	--	2%	3%
1 to < 3 years	3%	5%	4%	6%	1%	1%	5%	5%
3 to < 6 years	4%	3%	5%	6%	6%	6%	9%	10%
6 to < 10 years	7%	8%	7%	8%	17%	19%	10%	12%
10+ years	85%	84%	83%	80%	76%	74%	72%	71%

Distance from Ferry	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	4,694	3,081	2,944	3,289	1,642	1,568	4,142	4,168
< 1 mile	7%	7%	7%	7%	5%	6%	1%	1%
1 to 5 miles	29%	31%	30%	31%	32%	34%	36%	38%
6-10 miles	28%	29%	29%	28%	29%	28%	25%	27%
11-20 miles	17%	18%	19%	18%	18%	18%	19%	20%
20+ miles	17%	13%	15%	14%	15%	14%	19%	15%

Those responding to the surveys tend to be older, with the majority above the age of 55. A majority of respondents to the Summer Panel are female, while a narrow majority of Winter respondents are male.

Age	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	3,980	2,333	1,898	2,271	732	1,625	1,522	4,159
18-24	1%	0%	1%	3%	2%	1%	2%	2%
25-34	7%	4%	6%	11%	6%	4%	8%	8%
35-44	11%	8%	12%	13%	13%	9%	14%	13%
45-54	17%	14%	20%	20%	22%	22%	24%	24%
55-64	27%	31%	30%	29%	31%	35%	29%	34%
65+	37%	42%	31%	25%	25%	29%	23%	20%

Gender	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	4,814	3,130	3,019	3,400	1,712	1,574	4,186	4,169
Male	46%	49%	53%	51%	52%	54%	46%	48%
Female	52%	49%	46%	47%	48%	46%	54%	52%

As in 2010, the majority of Winter respondents are employed full time. In the Summer, a plurality work full-time. About a third are retired in both surveys. Annual household income for ferry riders is weighted towards the higher end, with a near majority earning over \$75,000.

Employment Status	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	4,762	3,112	2,975	3,356	1,659	1,578	4,203	4,111
Employed full-time	49%	52%	53%	57%	55%	55%	55%	56%
Employed part-time	10%	10%	12%	11%	12%	11%	11%	11%
Student/employed	1%	1%	1%	1%	1%	1%	1%	2%
Student/not employed	1%	1%	1%	2%	1%	<1%	1%	1%
Military personnel	0%	0%	0%	0%	-	-	<1%	1%
Retired	29%	28%	24%	20%	22%	24%	22%	20%
Homemaker	2%	2%	2%	2%	2%	1%	3%	3%
Not employed	2%	2%	2%	2%	2%	3%	2%	3%
Other	0%	5%	5%	4%	--	--	3%	4%

Note: In Summer 2016, military personnel and other were combined, which equaled 0%.

Income	Summer 2016	Winter 2016	Summer 2014	Winter 2014	Summer 2012	Winter 2012	Summer 2010	Winter 2010
Respondents	4,694	3,084	2,950	3,295	1,382	1,319	3,423	3,389
Under \$15,000	1%	1%	1%	2%	1%	2%	2%	2%
\$15,000 - \$24,999	2%	2%	2%	3%	2%	4%	4%	4%
\$25,000 - \$34,999	3%	3%	4%	4%	4%	5%	5%	6%
\$35,000 - \$49,999	6%	6%	7%	6%	7%	9%	10%	10%
\$50,000 - \$74,999	14%	13%	14%	14%	14%	18%	22%	19%
\$75,000 - \$99,000	14%	16%	14%	14%	16%	20%	20%	21%
\$100,000 - \$149,999	19%	19%	17%	19%	19%	23%	23%	22%
\$150,000 or more	14%	14%	16%	16%	15%	18%	16%	16%
Refused	27%	27%	25%	23%	--	--	--	--

Weighting Schemes

Specific weights were applied to the data gathered in order to more accurately match with general population statistics, and therefore have a better understanding of the thoughts and opinions of the public as a whole. Weights were added based on the route and boarding method of respondents' last ferry trip. Any respondent not falling into the groups below were weighted with 1.00. Note that due to a change in programming, the weighting method was slightly different for summer 2016 than the other 2016 surveys and the years preceding.

Route	Summer			Winter		
	Vehicle Driver	Vehicle Passenger	Foot Passenger	Vehicle	Passenger	Walk on
Seattle/Bainbridge	1.18	4.45	1.63	1.29	3.37	1.26
Seattle/Bremerton	1.34	3.85	1.81	1.43	2.49	1.70
Point Defiance/Tahlequah*	2.15	5.00	5.00	1.41	3.67	1.55
Edmonds/Kingston	1.29	3.10	1.55	1.29	3.90	1.30
Fauntleroy/Vashon	1.00	4.79	1.24	0.91	2.45	1.56
Fauntleroy/Southworth	0.82	2.23	0.74	1.22	1.86	1.23
Southworth/Vashon*	1.24	1.69	4.56	1.73	0.36	2.40
Coupeville/Pt. Townsend	0.35	1.27	1.04	0.50	2.70	1.09
Mukilteo/Clinton	0.83	2.37	1.00	0.85	2.12	1.00
Anacortes/San Juan Islands	0.15	0.65	1.02	0.14	0.41	0.40
San Juan Interisland*	0.50	0.01	0.00	0.32	0.26	0.04
Anacortes/ Sidney B.C.	0.25	0.61	3.24	--	--	--

Appendix: List of CD Materials

1 - Ferry Naming Quick Poll

- 1 - Ferry Naming Quick Poll Report
- 2 - Ferry Naming Quick Poll Presentation
- 3 - Ferry Naming Quick Poll Verbatims (FROG)
- 4 - Ferry Naming Quick Poll Verbatims (VOWS)

2 - Freight Shippers Survey

- 1 - Freight Shippers Report
- 2 - Freight Shippers Presentation
- 3 - Freight Shippers Topline
- 4 - Freight Shippers Verbatims

3 - Winter Rider Survey

- 1 – Winter Rider Report
- 2 – Winter Rider Presentation
- 3 – Winter Rider Topline
- 4 – Winter Rider Verbatims

4 - General Public Survey

- 1 – General Public Report
- 2 – General Public Presentation
- 3 – General Public Verbatims

5 - Summer Reservation Survey

- 1 – Summer Reservation Report
- 2 – Summer Reservation Presentation
- 3 – Summer Reservation Verbatims

6 - Summer Panel & On Board Survey

- 1 – Summer Rider Report
- 2 – Summer Rider Presentation
- 3 – Summer Rider Topline
- 4 – Summer Rider Verbatims