



Washington State Transportation Commission
Voice of Washington State (VOWS) Survey Panel
June 2016 General Market Assessment of WSF
Final Report

Preface



- ❖ Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.
- ❖ The FROG research initiative in 2016 consists of the following main phases:
 - Winter Customer Survey Study (target audience: commuter riders) via FROG
 - Freight Survey (target audience: WSF freight customers) via executive telephone survey
 - **General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS**
 - Summer On-board Recreational Survey (target audience: out of state riders)
 - Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)
- ❖ The focus of this report is the General Market Assessment Survey.

Table of Contents



	<u>Page #</u>
❖ Methodology	4
❖ Executive Summary	5
❖ Detailed Study Findings:	
– Ferry Ridership	9
– Travel Frequency	10
– Last Route Travelled	12
– All Routes Ever Travelled	16
– Last Trip Purpose	17
– Travel Behavior	20
– Travel Changes	22
– Reasons for Riding Less Frequently	23
– WSF Importance	24
– Operations Funding	27
– Fare Coverage	29
– Capital Funding	31
– Demographics	33
❖ Appendix:	
– Appendix A – Questionnaire	36
– Appendix B – Weighting Scheme	38

Methodology



- ❖ The following report presents the findings from the general market assessment research. The main objectives of this research are to understand:
 - How are the ferries utilized by three distinct groups: Residents living in: 1) Eastside of Puget Sound, 2) Westside of Puget Sound and 3) Residents living in Non Puget Sound areas?
 - How has WSF utilization changed since the past 2008, 2010 and 2014 studies?
 - How important do residents think WSF is as a contributor to the overall economy and recreation/tourism in the Puget Sound region?
 - What are residents feelings towards who should pay for WSF operational and capital costs?
- ❖ The study was conducted between June 3, 2016 and June 19, 2016 via the Voice of Washington State (VOWS) online panel representing residents from across all of Washington. A total of 6,332 online interviews were conducted. A sample of 6,332 yields a maximum sampling variability of +/- 1.2% at the 95% confidence level.
- ❖ The data was weighted to be proportionate to the state population. See appendix B for details.
- ❖ Throughout the report these terms are used to define the following segments.
 - Statewide refers to the total sample
 - Puget Sound (PS) refers to the sample of counties boarding the Puget Sound
 - East side communities (PS-East) are: King, Snohomish, Skagit, Pierce, etc. on the east side of Puget Sound
 - West side communities (PS-West) are: Kitsap, Clallam, Island, Jefferson, etc. on the west side of Puget Sound
 - Non-Puget Sound communities (non-PS) are all counties not bordering the Puget Sound

Executive Summary



Ferry Ridership:

- ❖ Approximately 9 in 10 state residents (95%) in 2016 have ridden a Washington State Ferry (WSF) at some point in their lives. Puget Sound (PS) basin residents “ever” ridership of WSF in 2016 is 98% compared to non-Puget Sound (Non-PS) basin of 89%.
- ❖ Infrequent WSF travelers (riders that travel less than once a month) frequency varies greatly by location (half (58%) of non-Puget Sound residents use WSF less than once a year vs. Puget Sound Westside residents where half (53%) use WSF at least once every 3 months).
- ❖ Non-Puget Sound basin residents use Anacortes (21%) more often than their Puget Sound counterparts (16% Eastside, 1% Westside).
- ❖ Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 47%) and to see friends (15%, 22%) than their PS Westside counterparts (8%, 13% respectively).
- ❖ Those living on the Westside of Puget Sound use the ferries for work (18%) and personal business/activities (19%) more so than Puget Sound Eastside (2%, 12%) or Non-Puget Sound (1%, 11%) residents.

Executive Summary



Ferry Ridership Changes:

- ❖ PS Westside residents who travel monthly make considerably more trips (16.4 one way trips per month) than their PS Eastside counterparts (9.1 one way trips).
- ❖ The change in travel behavior for infrequent riders (ride less than once a month) has increased slightly between 2014 and 2016 for the Puget Sound basin.
- ❖ Among the 14% statewide who have decreased their ridership of WSF, the two most frequently mentioned reasons for riding less frequently are: “change in life style” (26%) and “ferry fares are too high” (14%).

Ferry Importance To Puget Sound:

- ❖ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (88%) and PS tourism (92%). The perceived economic importance of WSF is only 5 percentage points higher in PS-East (90%) than Non-PS (85%).
- ❖ The perceived importance of WSF to the Puget Sound Economy for all PS residents has declined slightly from 2008 (96% important) to 2016 (90%).

Executive Summary



Attitudes Towards Funding:

- ❖ About the same percent of PS riders in 2016 (72%) as in 2014 (70%) feel that daily operations should be paid for by a mix of rider's fares and general gas taxes.
- ❖ Non-PS residents in 2016 are more likely (39%) to say "riders only" should pay the daily operation costs than their Puget Sound counterparts (21%).
- ❖ Statewide, about seven in ten (67%) say daily operations should be paid for by a mix (riders and everyone) and that the rider portion of costs should be 61.2%.
- ❖ Almost half (48%) of residents statewide in 2016 think that it is appropriate that ferry fares cover 2/3 of daily operating expenses. One out of three residents statewide (34%) in 2016 think fares should cover a higher percent than just two thirds of operating costs.
- ❖ Non-Puget Sound residents in 2016 (43%) feel riders should pay more than 2/3 than Puget Sound residents (27%).
- ❖ Statewide residents are divided when it comes to who should pay for capital investments (Everyone – 42%, PS Residents – 30%, Ferry Riders – 21%).



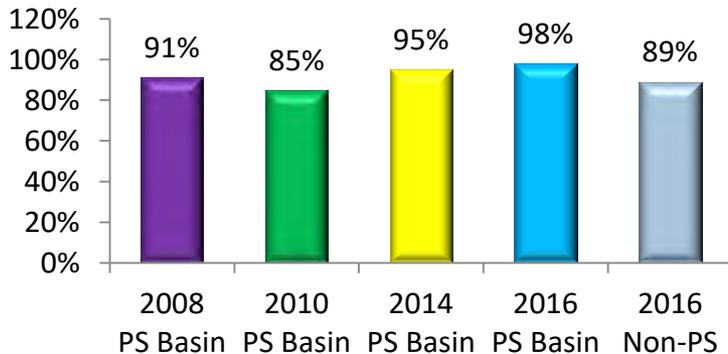
Detailed Study Findings

Ferry Ridership – 2008/2016

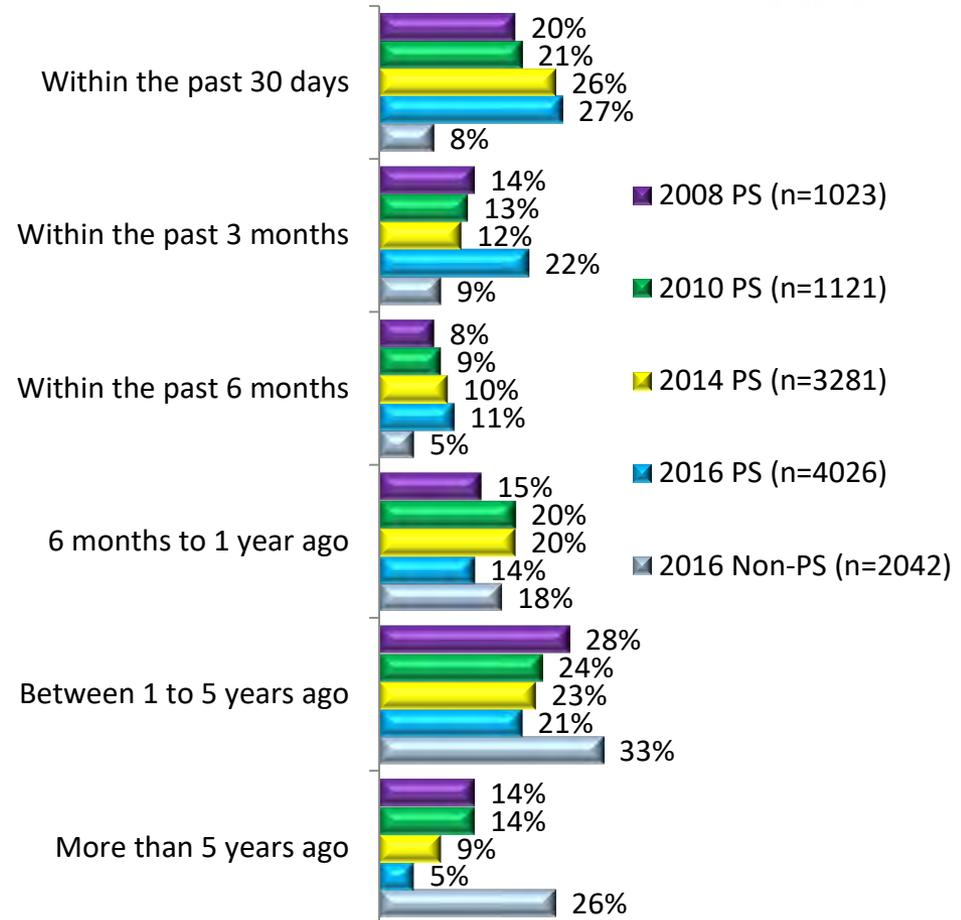


- ❖ Approximately 9 in 10 state residents (95%) in 2016 have ridden a WSF at some point in their lives.
 - ❖ Puget Sound (PS) basin residents “ever” ridership in 2016 is 98% compared to non-Puget Sound (Non-PS) basin of 89%
 - ❖ Timing of the last trip has been consistent since 2008 in the Puget Sound basin where two out of three have used WSF in the last 12 months.

Ferry Ridership (2008-2016)



Last trip on WSF (2008-2016)



Q1 Have you ever ridden a Washington State Ferry?

Q3 When was the last time you rode a Washington State Ferry? Was it...

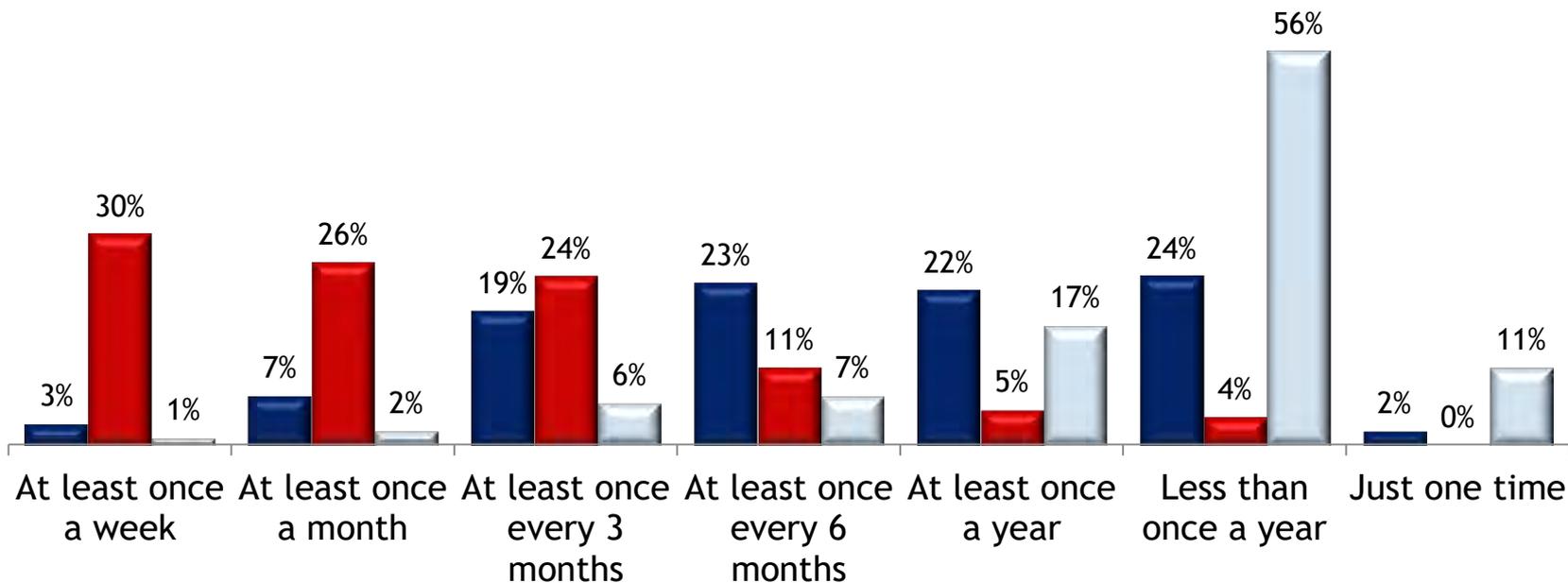
Travel Frequency – 2016 Overall



- ❖ Residents living in Westside communities in the Puget Sound basin have a higher travel frequency on WSF than residents living in Eastside Puget Sound basin communities or in Non-Puget Sound areas.

Travel Frequency (2016)

■ PS-East (n=3019) ■ PS-West (n=801) ■ 2014 Non-PS (n=2042)



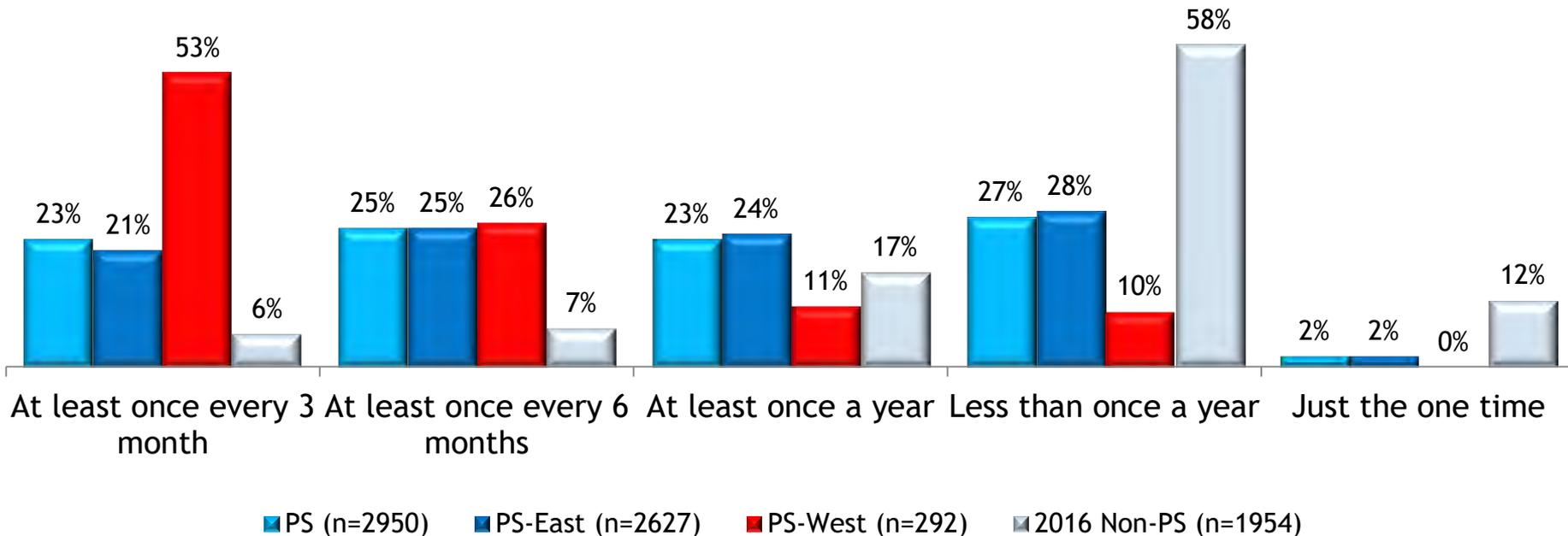
Q8 Approximately how often do you ride Washington State Ferries?

Travel Frequency – Infrequent Rider



- ❖ When looking at infrequent travelers (riders that travel less than once a month) the WSF travel frequency varies greatly by location (Half (58%) of non-Puget Sound residents use WSF less than once a year vs. Puget Sound Westside residents where half (53%) use WSF at least once every 3 months).

Travel Frequency by *Infrequent Riders* (2016)



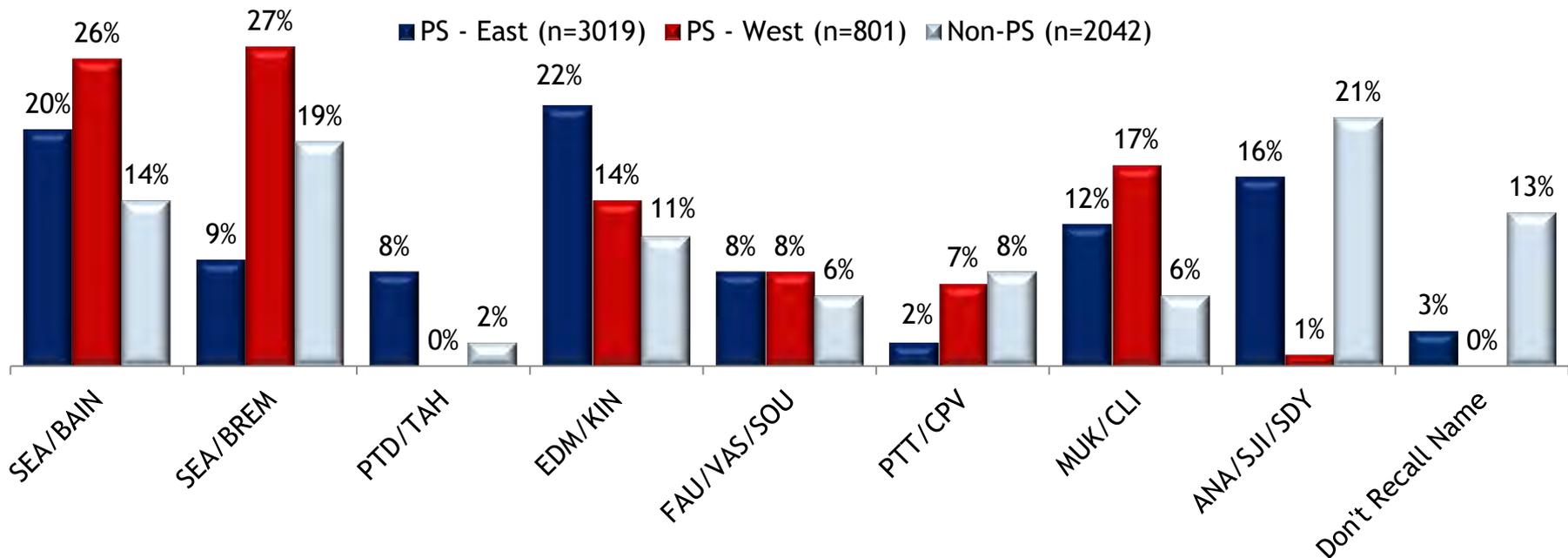
Q8 Approximately how often do you ride Washington State Ferries?

Last Route Travelled - 2016



- ❖ Residents in Westside Puget Sound basin communities tend to use Bremerton (27%), Bainbridge (26%), Mukilteo (17%) and Port Townsend (7%) more than their Eastside PS counterparts (9%, 20%, 12%, 2% respectively).
- ❖ Non-Puget Sound basin residents use Anacortes (21%) more often than their Puget Sound counterparts (16% Eastside, 1% Westside).

Last Route Travelled (2016)



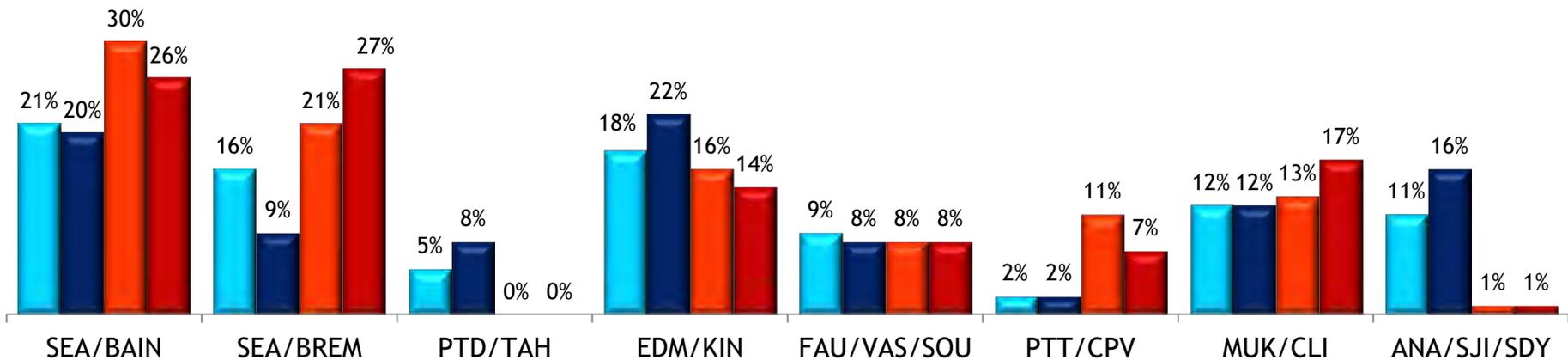
Q4 What was the last Washington State Ferry route that you took?

Last Route Travelled – P.S. Comparison



- ❖ Eastside residents used Seattle/Bremerton less often in 2016 (9%) than in 2014 (16%) with three to five percentage point up ticks in Edmonds/Kingston, Point Defiance/Tahlequah and Anacortes usage.
- ❖ Westside residents are using Seattle/Bremerton (27%) and Mukilteo/Clinton (17%) more so in 2016 than 2014 (21%, 13% respectively).

Last Route Travelled (2014-2016)



■ PS - East '14 (n=2859)
 ■ PS - East '16 (n=3019)
 ■ PS - West '14 (n=376)
 ■ PS - West '16 (n=801)

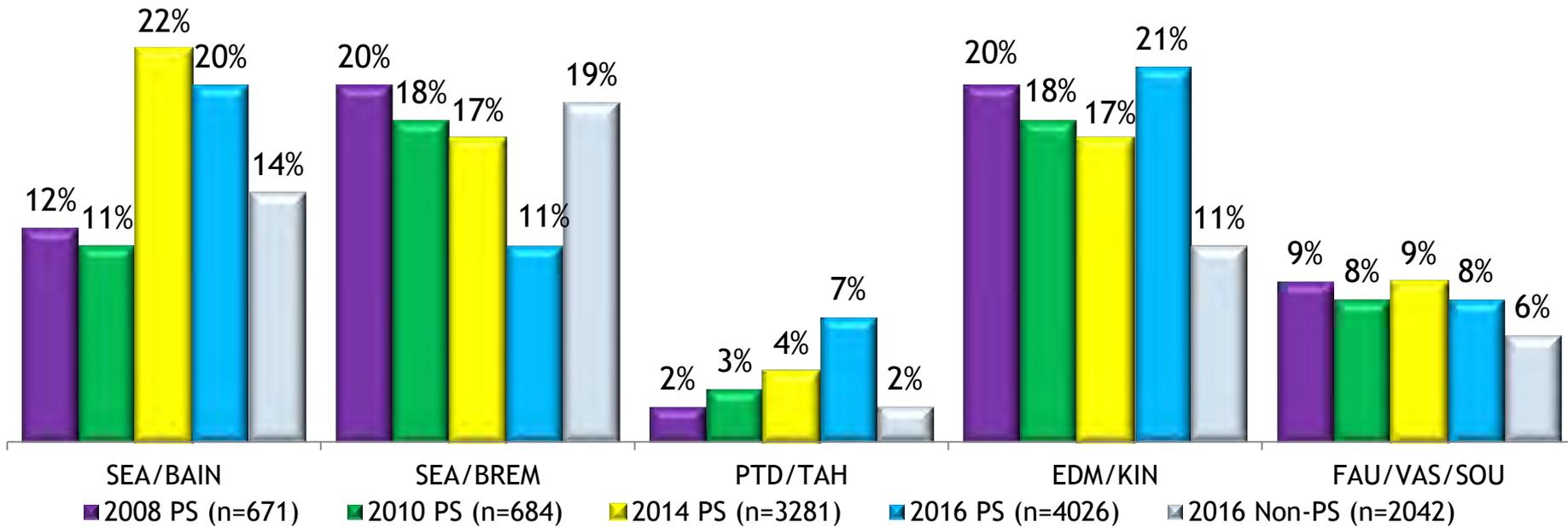
Q4 What was the last Washington State Ferry route that you took?

Last Route Travelled – 2008/16



- ❖ Puget Sound residents reported riding Bremerton (11%) less and Edmonds (21%) and Anacortes (16%) more in 2016 than in 2014 (17%, 17%, 10% respectively).
- ❖ Non-Puget Sound residents use Bremerton (19%), Anacortes (20%) and Port Townsend/Coupeville (8%) more often than their Puget Sound counterparts (11%, 16%, 2% respectively).

Last Route Travelled (2008-2016)



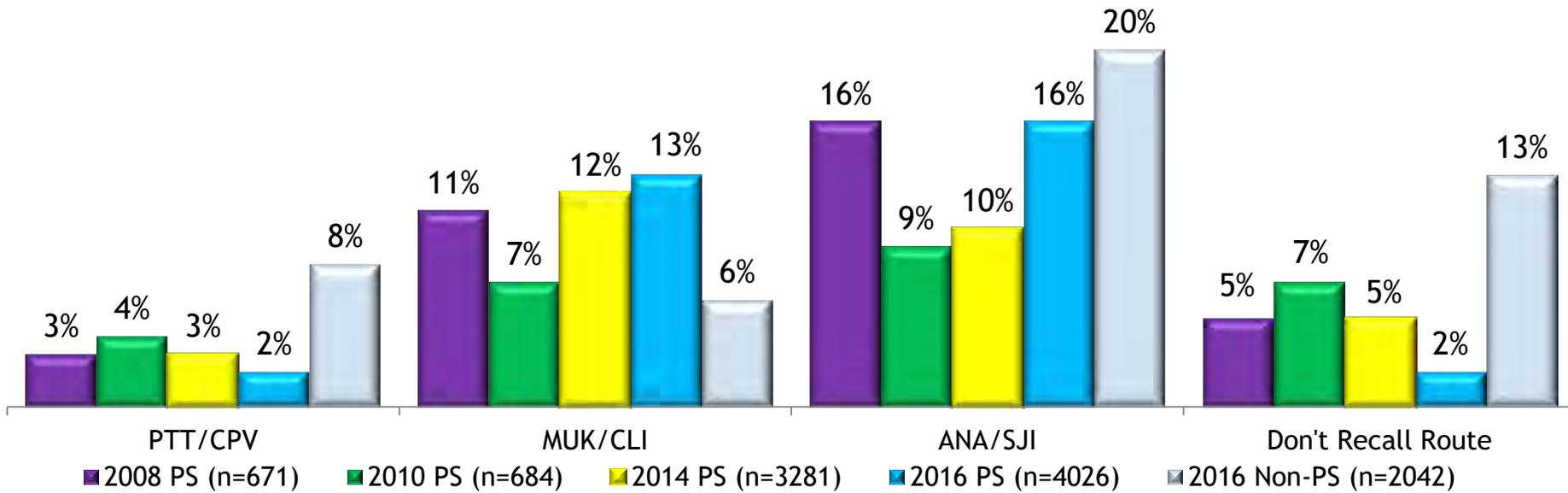
Q4 What was the last Washington State Ferry route that you took?

Last Route Travelled – 2008/16



- ❖ Puget Sound residents reported riding Bremerton (11%) less and Edmonds (21%) and Anacortes (16%) more in 2016 than in 2014 (17%, 17%, 10% respectively).
- ❖ Non-Puget Sound residents use Bremerton (19%), Anacortes (20%) and Port Townsend/Coupeville (8%) more often than their Puget Sound counterparts (11%, 16%, 2% respectively).

Last Route Travelled (2008-2016)



Q4 What was the last Washington State Ferry route that you took?

All Routes Ever Travelled - 2016



- ❖ As seen below, a majority of Puget Sound residents have travelled on Seattle/Bremerton (67%), Edmonds/Kingston (65%), Seattle/Bainbridge (62%) and Anacortes (58%) at some point in their lives.

Puget Sound Basin Residents (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%

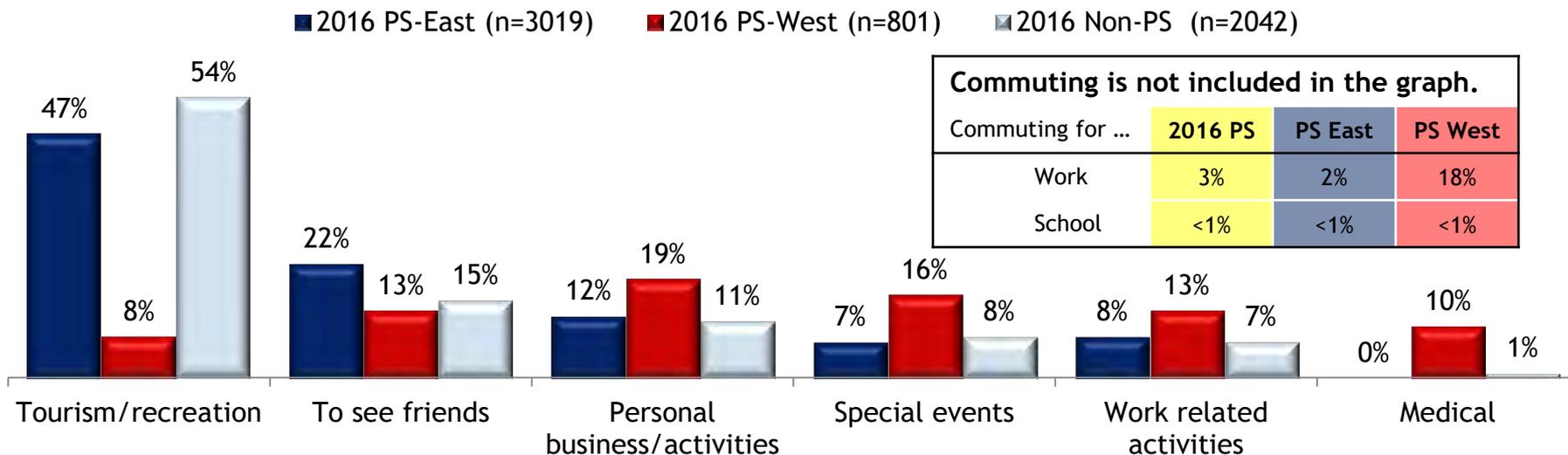
Q5 What other Washington State Ferries routes, if any, have you taken?
 Q4 What was the last Washington State Ferry route that you took?

Last Trip Purposes - 2016



- ❖ Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 47%) and to see friends (15%, 22%) than their Westside counterparts (8%, 13% respectively).
- ❖ Those living on the Westside use the ferries for work (18%) and personal business/activities (19%) more so than Puget Sound Eastside (2%, 12%) or Non-Puget Sound (1%, 11%) residents.

Most Frequently Mentioned Trip Purpose (2016)



Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

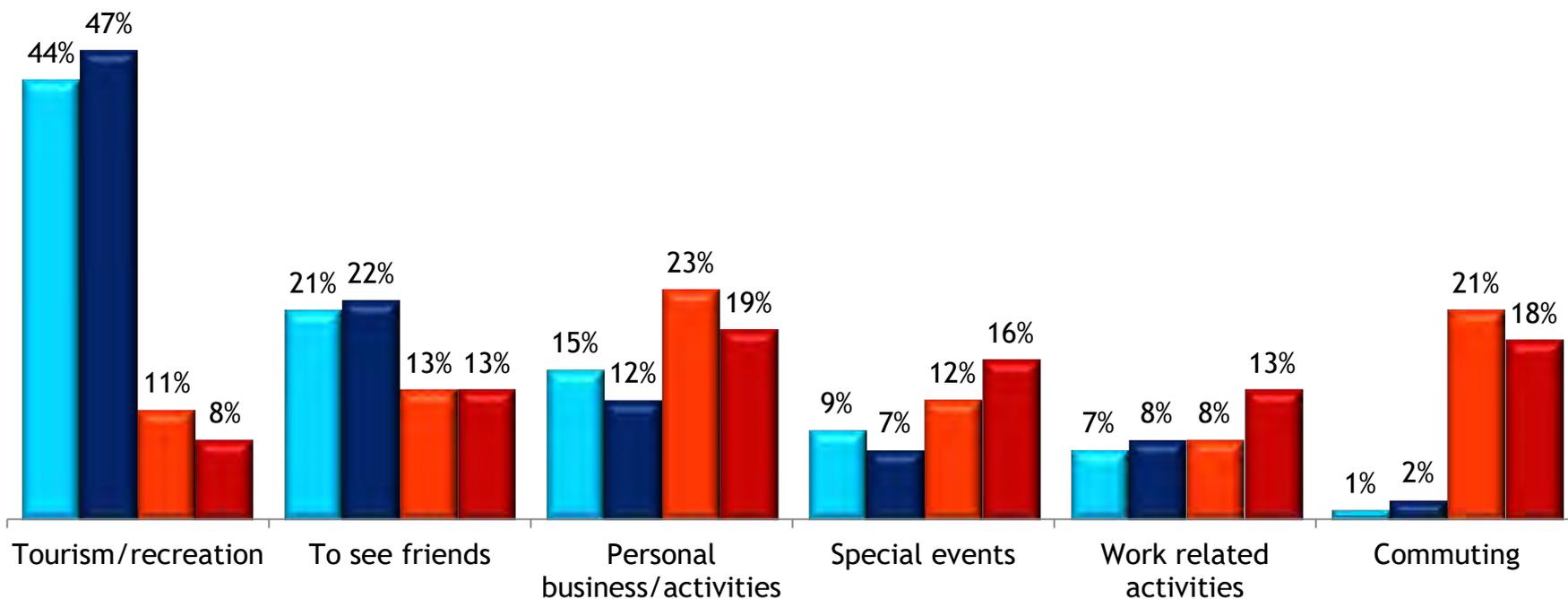
Last Trip Purposes – P.S. Comparison



- ❖ The results are consistent (within 3 percentage points) between 2014 and 2016 for trip purposes within the Eastside Puget Sound basin.

Most Frequently Mentioned Trip Purpose East/West (2014-2016)

■ 2014 PS-East (n=2859) ■ 2016 PS-East (n=3019) ■ 2014 PS-West (n=376) ■ 2016 PS-West (n=801)



Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

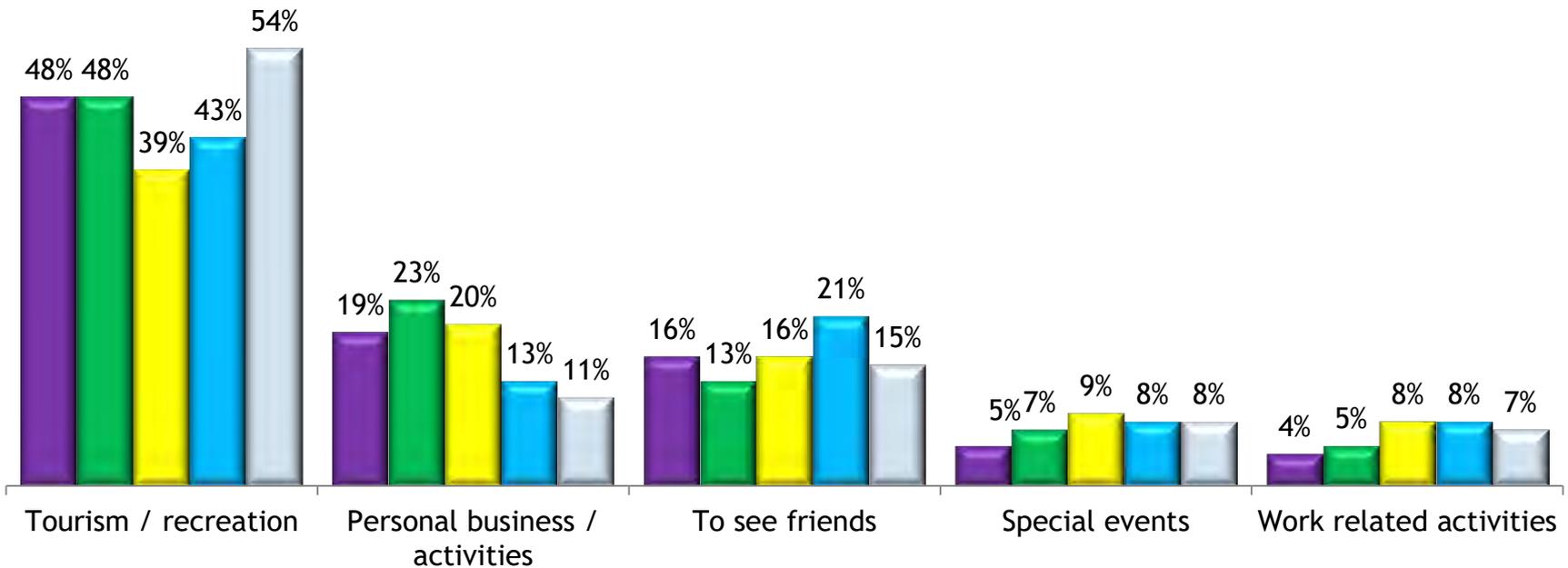
Last Trip Purposes – 2008/16



- ❖ Travelling on WSF for Tourism/Recreation for Puget Sound residents has increased from 39% in 2014 to 43% in 2016.

Most Frequent Mentioned Trip Purpose (2008-2016)

■ 2008 PS (n=746)
 ■ 2010 PS (n=648)
 ■ 2014 PS (n=3281)
 ■ 2016 PS (n=4026)
 ■ 2016 Non-PS (n=2042)



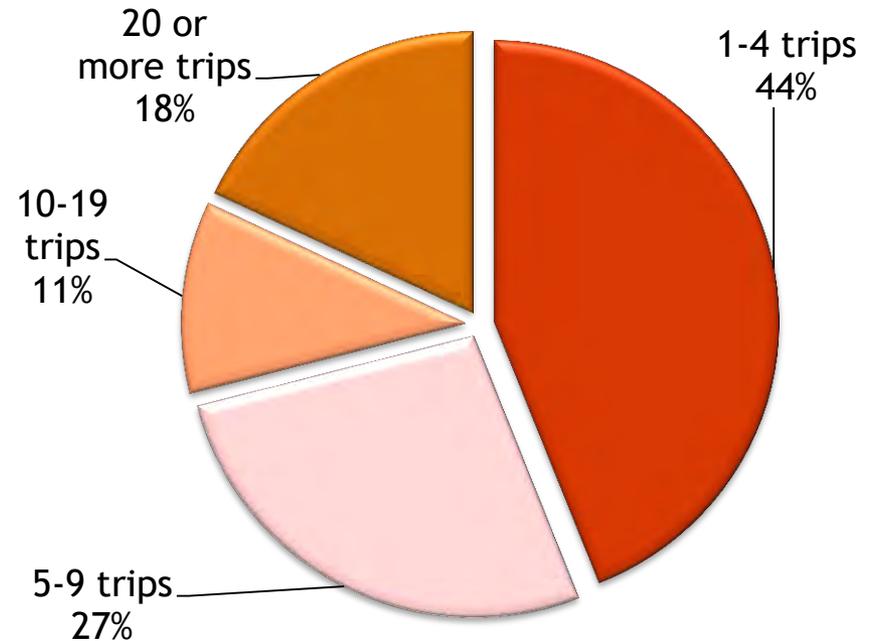
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

Travel Behavior – 2016 Monthly Riders



- ❖ Those statewide residents that use the ferries at least once a month make on average 11.0 one way trips a month.
- ❖ PS Westside residents who travel monthly make considerably more trips (16.4 one way trips per month) than their Eastside PS counterparts (9.1 one way trips).

Number of 1-way Trips Taken in Past 30 Days (2016 Statewide Monthly Riders)



(n=1158)

Travelled at least once in the past 30 days)

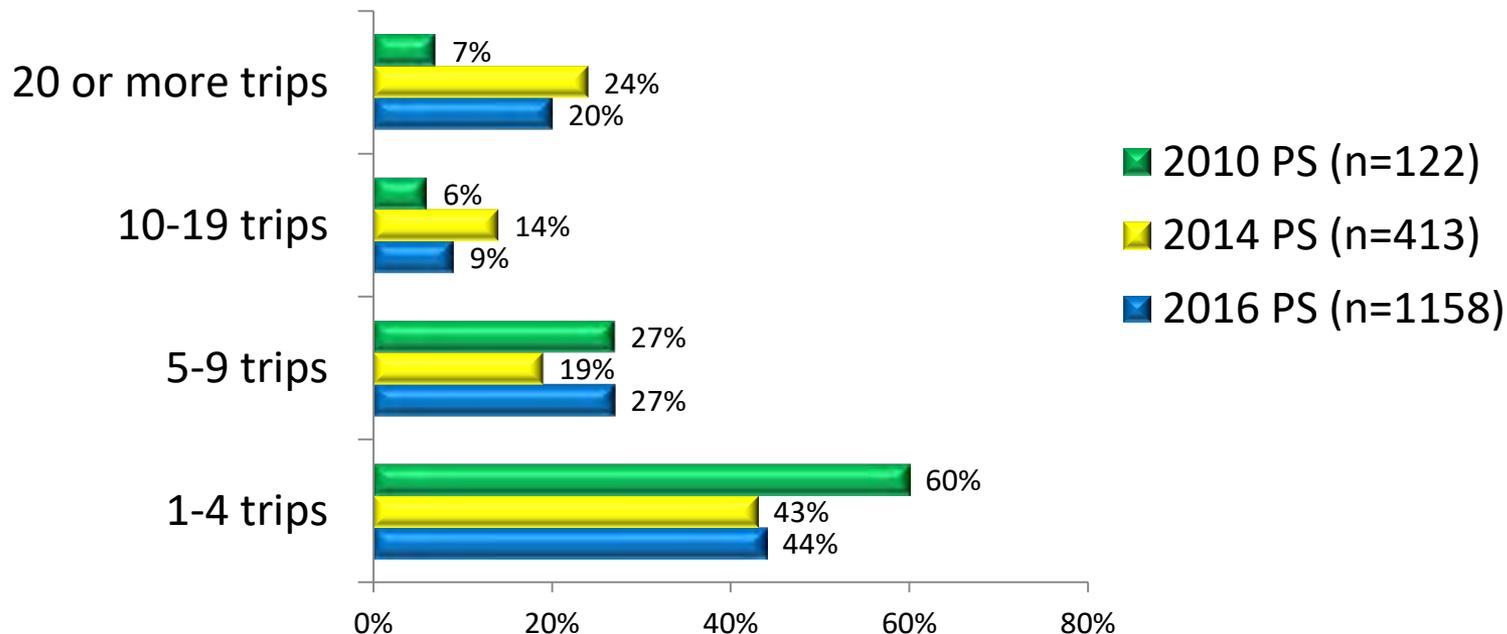
Q9 In the last 30 days, approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two-one way trips.

Travel Behavior – 2010/16 Monthly Riders



- ❖ Within the Puget Sound basin, monthly riders in 2016 (11.5 average one way trips) make more one way trips than was reported in 2010 (5.7 average one way trips).

Number of 1-way Trips Taken in Past 30 Days (2010-2016)



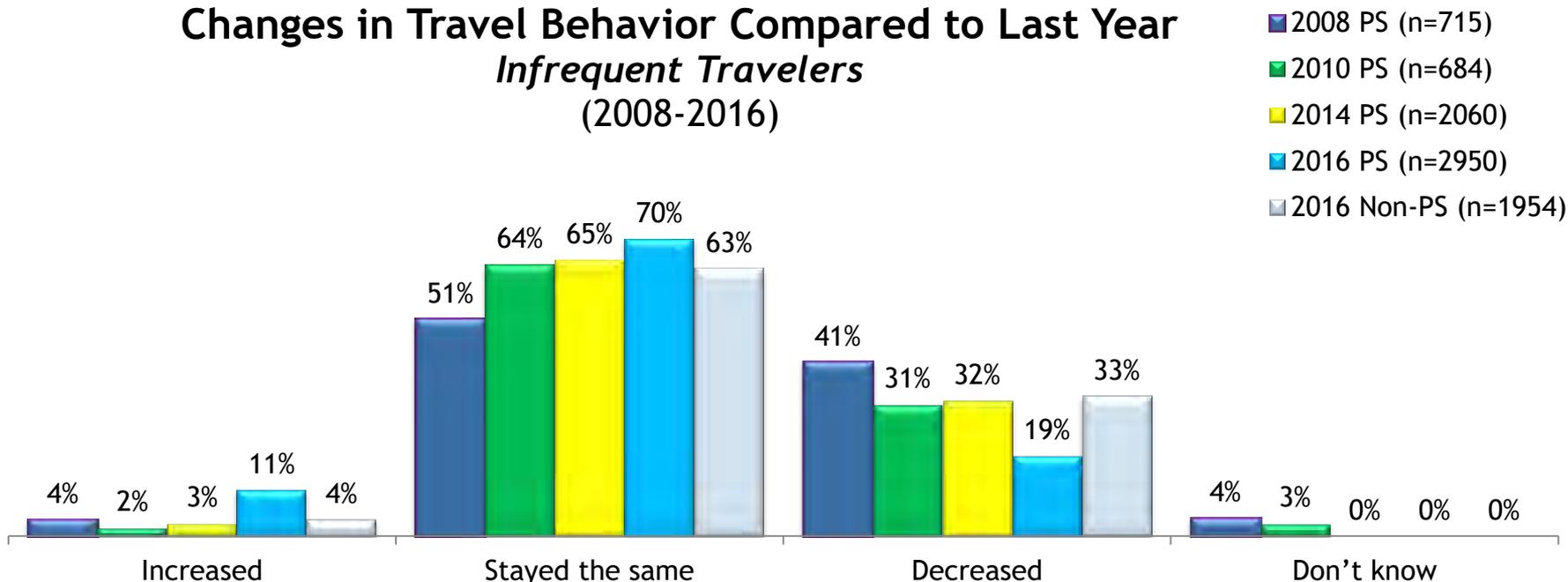
Q9 In the last 30 days, approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two one way trips.

Travel Changes – Infrequent Riders



- ❖ The change in travel behavior for infrequent riders (ride less than once a month) has increased slightly between 2014 and 2016 for the Puget Sound basin.
- ❖ About one in five (19%) infrequent Puget Sound basin riders say their WSF travel behavior has decreased over last year compared to 32% in 2014.

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



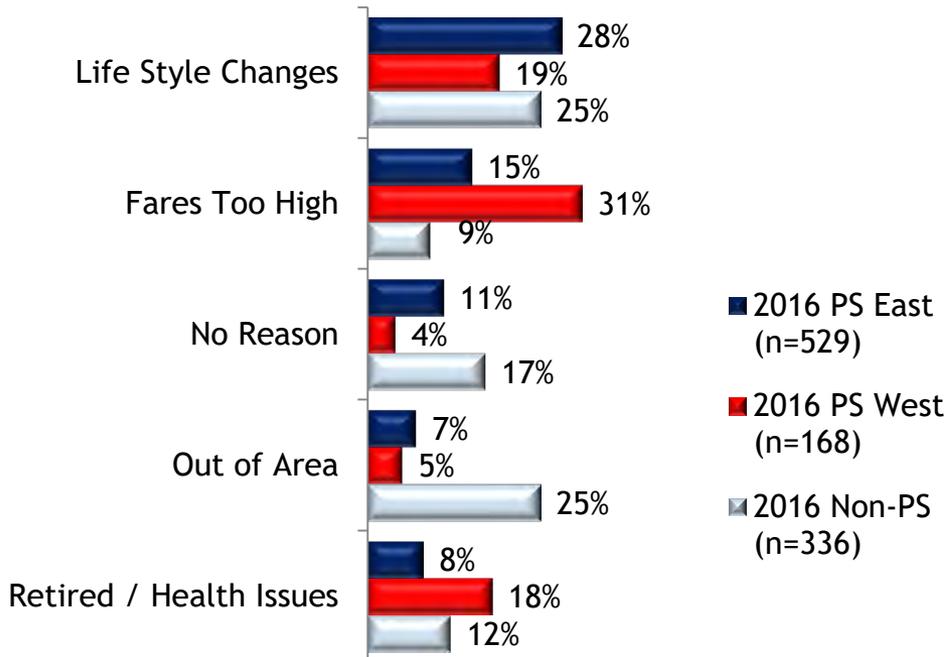
Q10 Over the past year, would you say the frequency with which you ride Washington State Ferries has... [READ LIST]

Reason For Riding Less - 2016



- ❖ Among the 14% (n=1,064) statewide who have decreased their ridership of WSF, the two most frequently mentioned reasons for riding less frequently are: “change in life style” (26%) and “ferry fares are too high” (14%).

Main Reasons for Riding Less:



- ❖ Among the 10% (n=638) statewide who have stopped riding completely, the main reasons for doing so are:
 - 37% Out of area
 - 33% No Reason / No need
 - 9% Life style changes
 - 9% Fares too high

- ❖ Among the 10% (n=611) statewide who have increased their ridership of WSF, the main reasons for doing so are:
 - 42% Life style changes
 - 32% Recreational outings
 - 13% Work / School changes
 - 10% Retirement

Q11 What is the primary reason you are riding Washington State Ferries less often?

Q12 What is the primary reason you have stopped riding Washington State Ferries completely?

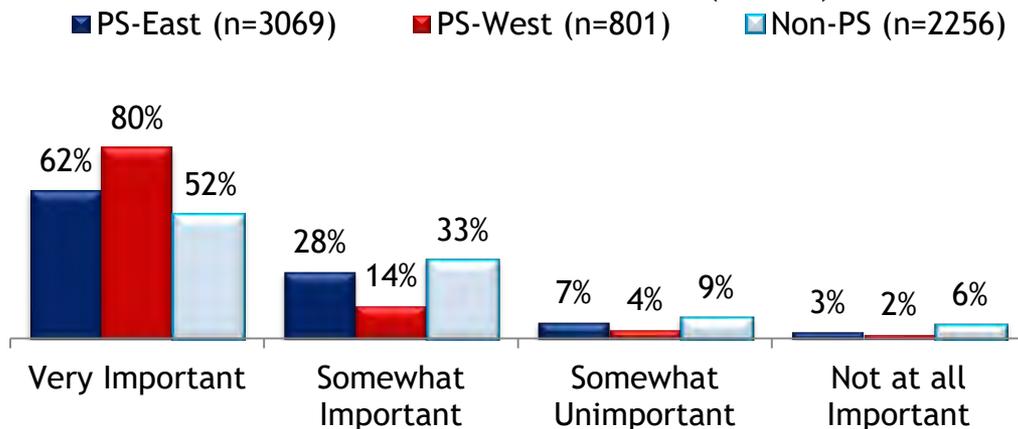
Q13 What would you say are the primary reasons that you are riding WSF more often?

WSF Importance - 2016

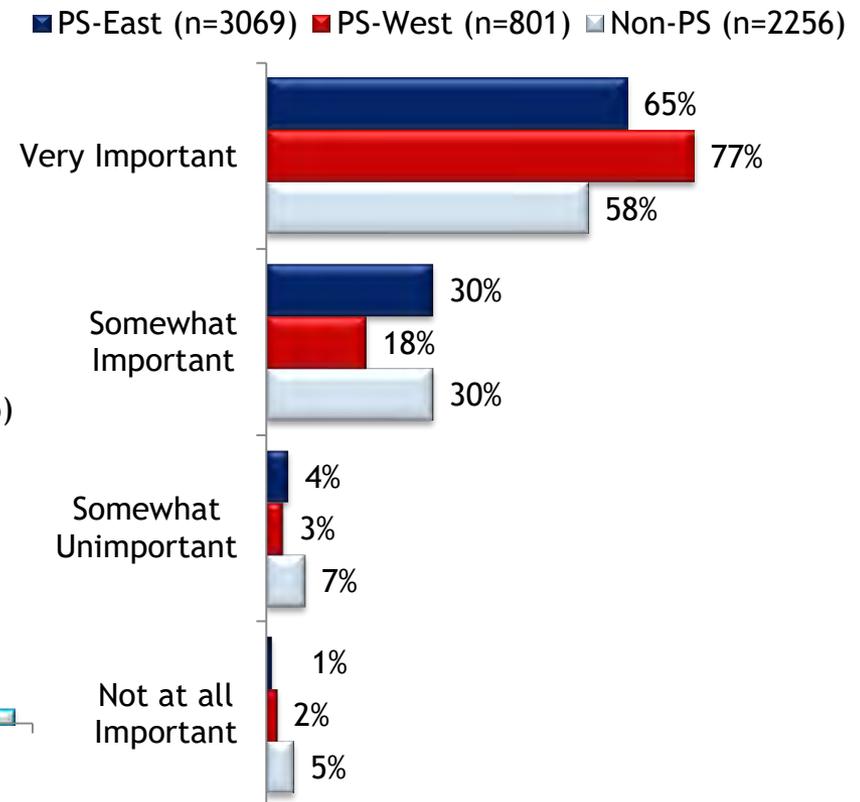


- ❖ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (88%) and PS tourism (92%).
- ❖ The perceived economic importance of WSF is only 5 percentage points higher in PS-East (90%) than Non-PS (85%).

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



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



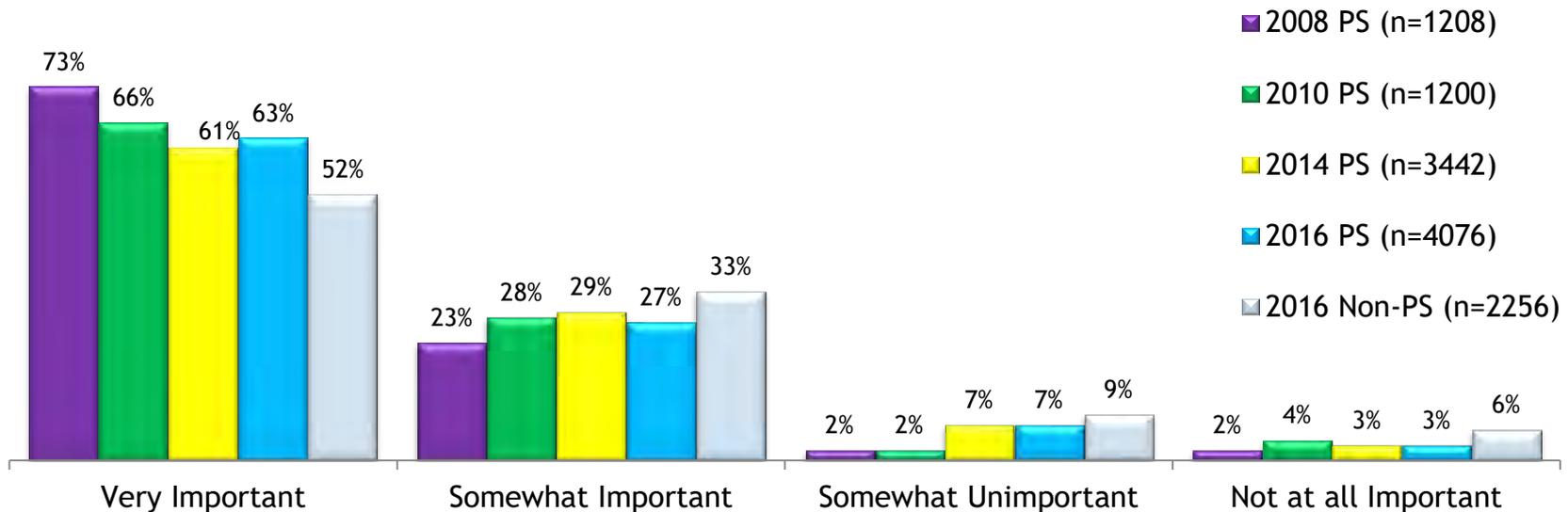
- Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...
- Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

WSF Importance – 2008/16



- ❖ The perceived importance of WSF to the Puget Sound Economy for all PS residents has declined slightly from 2008 (96% important) to 2016 (90%).
- ❖ Eight out of ten Non-PS residents say WSF is important to the economy of PS (85%).

Importance of WSF to PS Regional Economy and Growth (2008-2016)



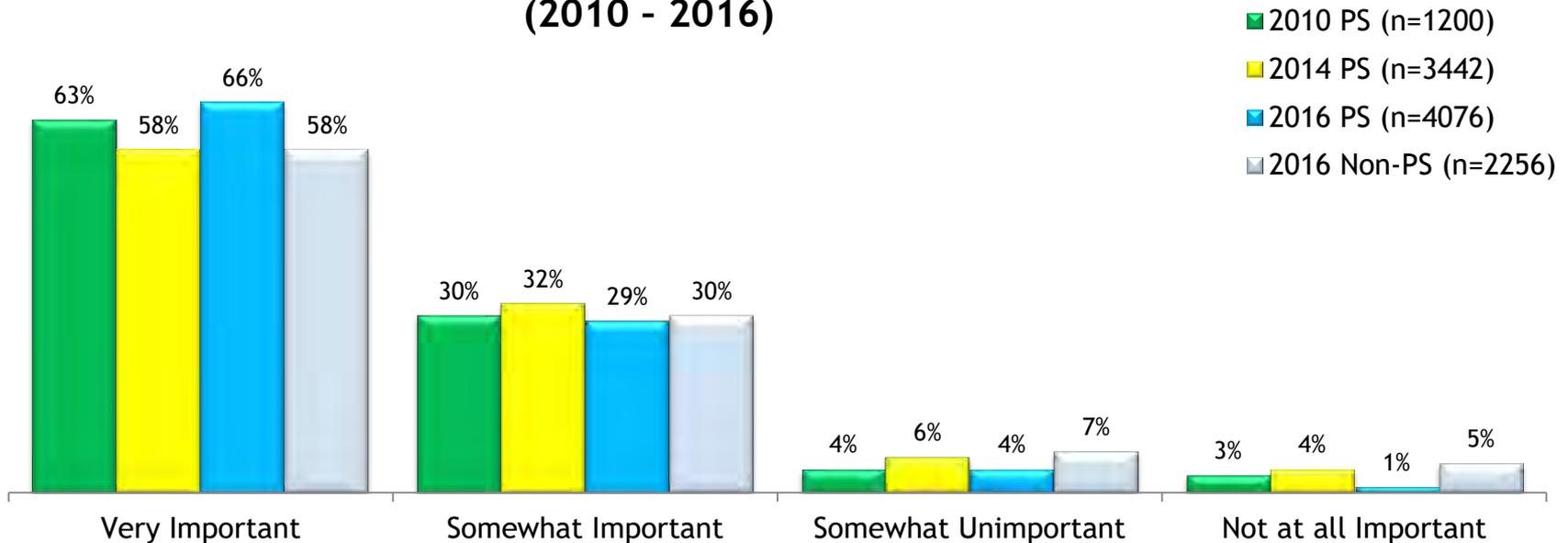
Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...

WSF Importance – 2008/16



- ❖ The perceived importance of WSF to Puget Sound tourism for all PS residents has remained the same from 2008 (96%) to 2016 (95%).
- ❖ Eight out of ten Non-PS residents say WSF is important to encouraging PS tourism (88%).

**Importance of WSF to Encouraging PS Regional Tourism
(2010 - 2016)**



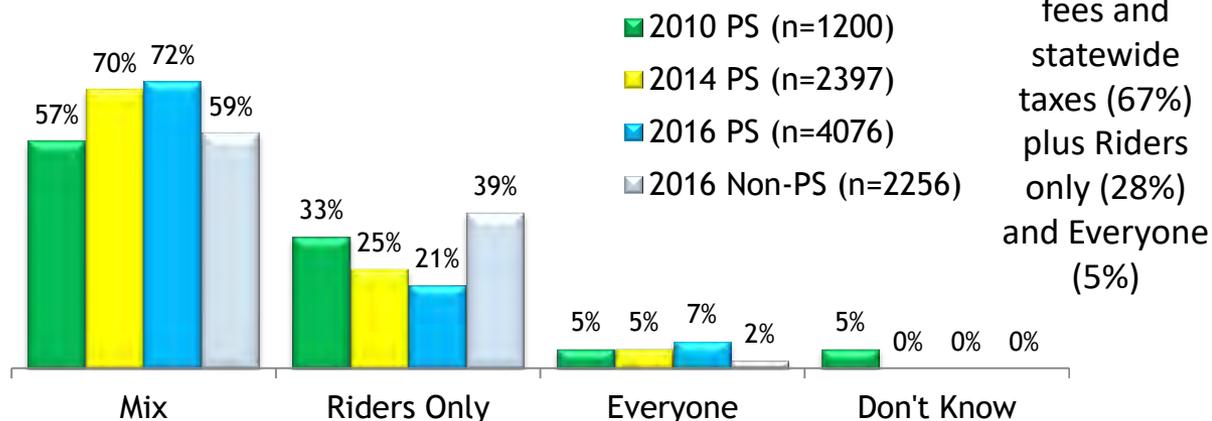
Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

Operations Funding – 2010/16



- ❖ About the same percent of PS riders in 2016 (72%) as in 2014 (70%) feel that daily operations should be paid for by a mix of rider’s fares and gas taxes.
- ❖ Non-PS residents in 2016 are more likely (39%) to say “riders only” should pay the daily operation costs than their Puget Sound counterparts (21%).
- ❖ Statewide, about seven in ten (67%) say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 61.2%.

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



Statewide
 Mix of rider fees and statewide taxes (67%) plus Riders only (28%) and Everyone (5%)



In 2016 citizens statewide suggested ferry riders should pay on average 61.2% of WSF’s daily operating costs (56.7% PS, 68.4% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 57.7%
- In comparison PS Westside residents said 47.3%, while Island dependent residents said 33.3%.

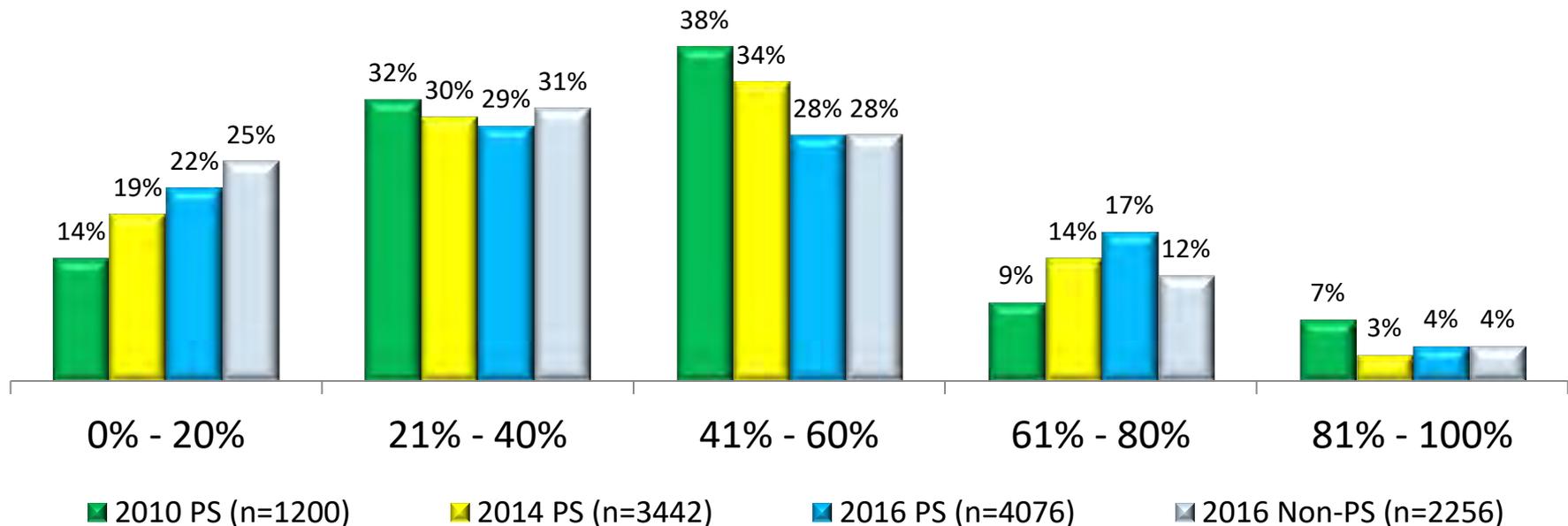
- Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:
- Q18 What percent of the daily operation costs do you feel riders should pay?

Operations Funding – 2010/16



- ❖ On average, 2016 Puget Sound residents think that fares cover 42.4% of WSF's annual operating expenses (Eastside 41.8% vs. 47.9% Westside vs. 39.9% Non-PS regions).
- ❖ The average perception of how much fares cover has changed little between 2010 and 2016 within the Puget Sound basin.

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



Q19 What percentage of WSF's annual operational costs do you think fares currently cover?

Fare Coverage - 2016



- ❖ Almost half (48%) of residents statewide in 2016 think that it is appropriate that ferry fares cover 2/3 of daily operating expenses.
- ❖ One out of three residents statewide (34%) in 2016 think fares should cover a higher percent than just two thirds of daily operating costs.

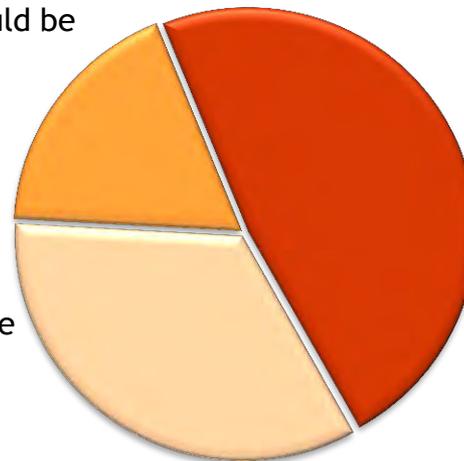
How Much Should Fares Cover of Annual Operating Costs (2016 Statewide)

Ferry fares should cover a **lower** percentage of operating costs and more gas tax dollars should be used to support ferry operational costs.

18%

Ferry fares should cover a **higher** percentage of operating costs.

34%



Two-thirds is an **appropriate amount** of the operating costs to be covered by ferry fares.

48%

(n=6332)

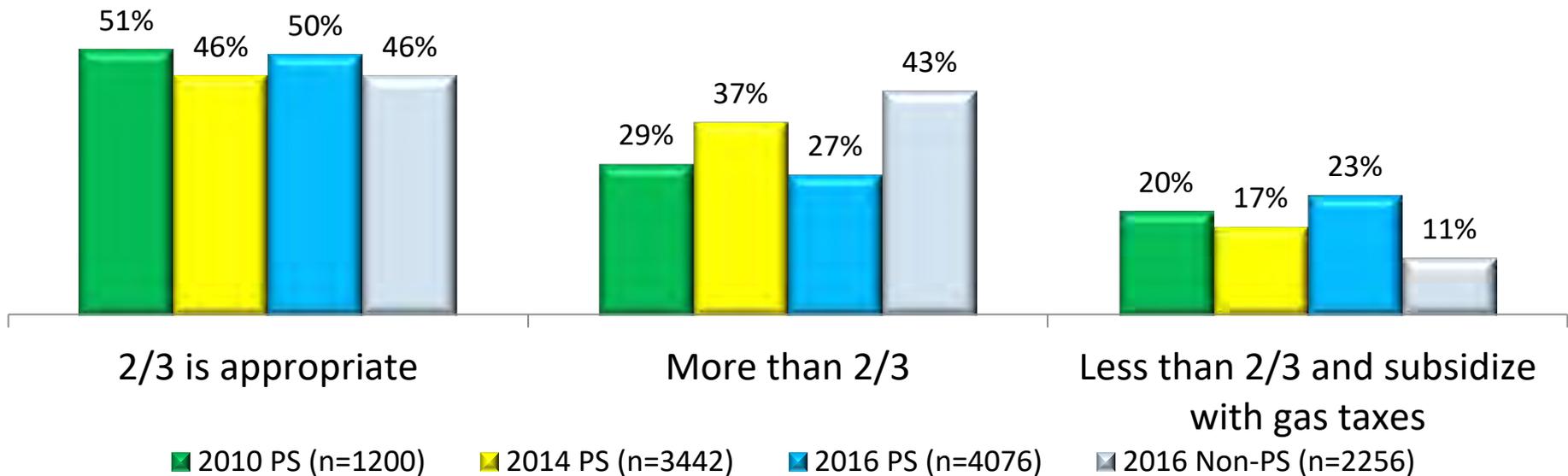
Q20 *On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?*

Fare Coverage – 2010/16



- ❖ 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)



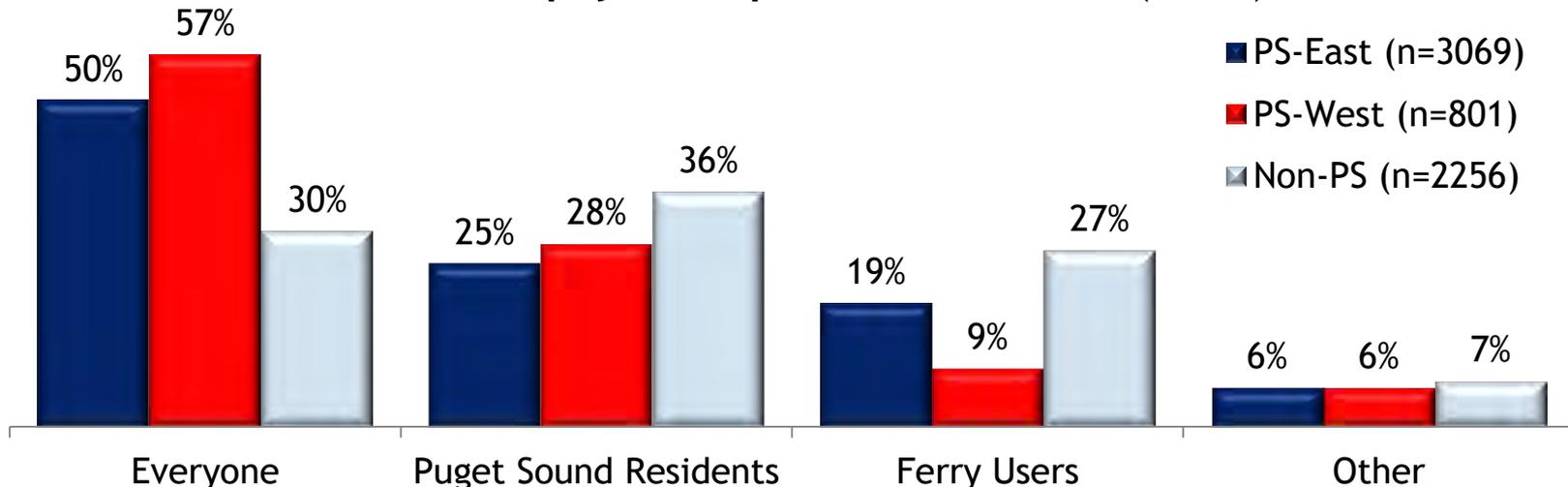
Q20 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

Capital Funding - 2016



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

Who should pay for capital investments? (2016)



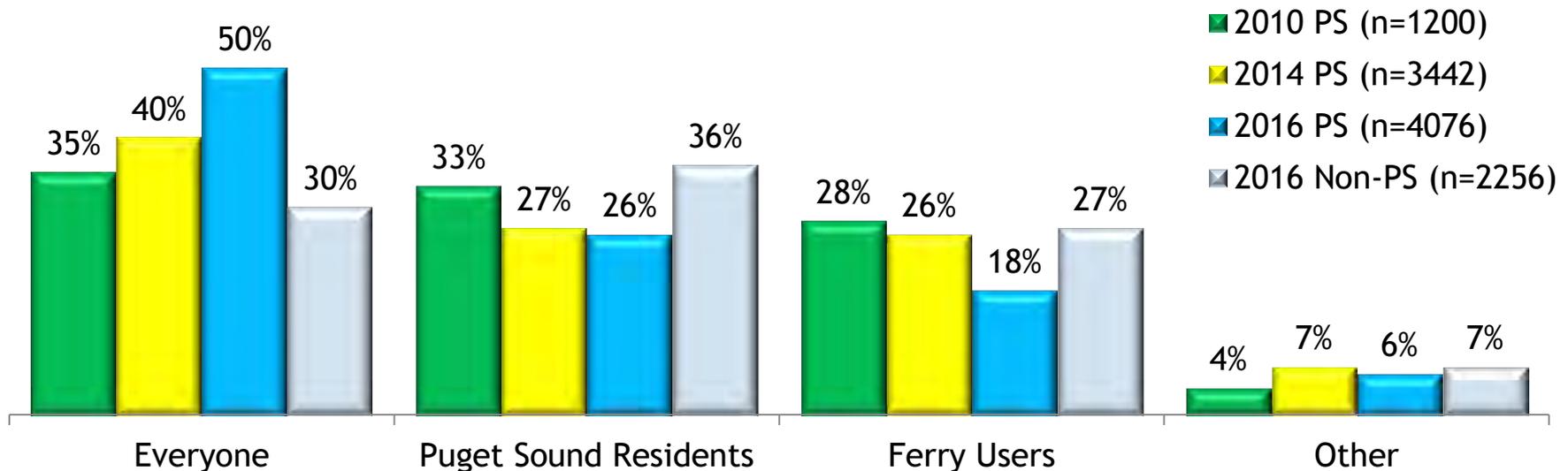
Q21 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:

Capital Funding – 2010/16



- ❖ In 2016, Non-Puget Sound residents are more likely to say “Puget Sound Residents” should pay for capital investments (36%) than their PS counterparts in either 2016 (26%) or 2014 (27%).

Who should pay for capital investments? 2010-2016



Q21 *Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:*

Demographics



- ❖ The panel in 2014 and 2016 was not controlled for gender while the 2008/2010 telephone surveys had strict 50/50 quotas set.

	2008 PS (n=1240)	2010 PS (n=1200)	2014 PS (n=3408)	2016 PS (n=4076)	2016 Non-PS (n=2256)
Gender					
Male	49%	49%	61%	61%	64%
Female	51%	51%	39%	39%	36%
Household Size					
Single person	15%	13%	17%	17%	16%
Multiple people	85%	83%	83%	83%	84%
Average household size	3.0	3.2	2.7	2.6	2.8
Household with children	40%	55%	35%	30%	33%
Single child	17%	23%	16%	12%	14%
Multiple children	43%	22%	19%	18%	20%
Age					
18-34	28%	29%	31%	38%	18%
35-54	41%	40%	43%	32%	38%
55 or older	30%	28%	26%	30%	45%

Demographics



- ❖ The panel in 2016 and 2014 has a greater percentage of college educated, full time employed and higher income members than found in the telephone surveys in 2008/2010.

	2008 PS (n=1240)	2010 PS (n=1200)	2014 PS (n=3408)	2016 PS (n=4076)	2016 Non-PS (n=2256)
Education					
HS graduate or less	19%	20%	5%	6%	12%
Some college/technical school	36%	26%	33%	32%	36%
College degree or higher	45%	49%	63%	59%	50%
Employment					
Full-time	49%	41%	68%	60%	54%
Part-time	13%	8%	7%	7%	8%
Income					
Less than \$35,000	13%	13%	15%	17%	20%
\$35,000 - \$74,999	42%	30%	30%	29%	39%
\$75,000 or more	45%	31%	55%	54%	41%



Appendix

Questionnaire

V34 - 2016 WSF VOWS General Market/Statewide Usage Survey

INTRO & Q1

Survey on Washington State Ferries and Roads

A unique part of Washington State's transportation system is the Washington State Ferries (WSF). This short (under 10 minutes) survey is designed to gather information about your opinions and possible usage of the ferry system as well as the state's road system.

To start with, have you ever ridden a Washington State Ferry?

(Boats operated directly by WSF not ones operated by either a private company or WSDOT directly)
Please press NEXT when you have completed answering the following question.

1. Yes
2. No / Don't recall ever riding _____ (SKIP TO Q15)

Q2

Approximately in what year did you take your FIRST ever ride on a Washington State Ferry?

[YOUR BEST GUESS]

- | | | |
|----------|----------|-------------------|
| 1. 2016 | 17. 2000 | 33. 1984 |
| 2. 2015 | 18. 1999 | 34. 1983 |
| 3. 2014 | 19. 1998 | 35. 1982 |
| 4. 2013 | 20. 1997 | 36. 1981 |
| 5. 2012 | 21. 1996 | 37. 1980 |
| 6. 2011 | 22. 1995 | 38. 1979 |
| 7. 2010 | 23. 1994 | 39. 1978 |
| 8. 2009 | 24. 1993 | 40. 1977 |
| 9. 2008 | 25. 1992 | 41. 1976 |
| 10. 2007 | 26. 1991 | 42. 1975 |
| 11. 2006 | 27. 1990 | 43. 1974 |
| 12. 2005 | 28. 1989 | 44. 1973 |
| 13. 2004 | 29. 1988 | 45. 1972 |
| 14. 2003 | 30. 1987 | 46. 1971 |
| 15. 2002 | 31. 1986 | 47. 1970 and past |
| 16. 2001 | 32. 1985 | 48. Don't Know |

Q3

When was the LAST (most recent) time you rode a Washington State Ferry? Was it...

1. Within the past 30 days,
2. Within the past 3 months,
3. Within the past 6 months,
4. Six months to one year ago,
5. Between 1 and 5 years ago, or
6. More than 5 years ago?
7. (Don't Recall when)

Q4

What was the last Washington State Ferry route that you took?

[SELECT ONE]

- | | |
|-------------------------------|--|
| 1. Seattle / Bainbridge | 9. Mukilteo / Clinton |
| 2. Seattle / Bremerton | 10. Anacortes / San Juans |
| 3. Point Defiance / Tahlequah | 11. San Juans Interisland (Includes Shaw, Orcas, Lopez, and Friday Harbor) |
| 4. Edmonds / Kingston | 12. Anacortes or San Juans / Sidney |
| 5. Fauntleroy / Vashon | 13. Don't recall the name of the route |
| 6. Fauntleroy / Southworth | 14. Never been on a Washington State Ferry (Skip to Q15) |
| 7. Vashon / Southworth | |
| 8. Coupeville / Port Townsend | |

Q5 (MULTIPLE)

Besides $\{(\text{custom1})\}$, what other Washington State Ferries routes, if any, have you ever taken?

[SELECT ALL THAT APPLY]

- | | |
|-------------------------------|--|
| 1. Seattle / Bainbridge | 9. Mukilteo / Clinton |
| 2. Seattle / Bremerton | 10. Anacortes / San Juans |
| 3. Point Defiance / Tahlequah | 11. San Juans Interisland (Includes Shaw, Orcas, Lopez, and Friday Harbor) |
| 4. Edmonds / Kingston | 12. Anacortes or San Juans / Sidney |
| 5. Fauntleroy / Vashon | 13. Didn't take any other routes |
| 6. Fauntleroy / Southworth | 14. Don't recall name of other routes that I took |
| 7. Vashon / Southworth | |
| 8. Coupeville / Port Townsend | |

Q6

You said your last ferry ride was on the $\{(\text{custom1})\}$ ferry. What was your primary purpose for that particular trip?

[SELECT ONE]

- | | |
|-------------------------------------|--|
| 1. Commute to / from work | 7. Major shopping (e.g. Costco, Walmart) |
| 2. Commute to / from school | 8. Tourism / recreation |
| 3. Work related activity / business | 9. Travel to / from special event |
| 4. Personal business / activity | 10. Travel to / from to see family/friends |
| 5. Medical appointment | 11. Other |
| 6. Everyday shopping | |

Q7 (MULTIPLE)

For what other purposes, if any, do you take or have you taken any Washington State Ferries in the past?

[SELECT ALL THAT APPLY - IF NO OTHER REASONS CHECK "no other reasons" BELOW AND HIT NEXT]

- | | |
|-------------------------------------|--|
| 1. Commute to / from work | 7. Major shopping (e.g. Costco, Walmart) |
| 2. Commute to / from school | 8. Tourism / recreation |
| 3. Work related activity / business | 9. Travel to / from special event |
| 4. Personal business / activity | 10. Travel to / from to see family/friends |
| 5. Medical appointment | 11. NO OTHER REASONS |
| 6. Everyday shopping | 12. Other |

Q8

Approximately how often do you ride Washington State Ferries?

[SELECT ONE]

1. At least once a week
2. At least once a month
3. At least once every 3 months _____ (Skip to Q10)
4. At least once every 6 months _____ (Skip to Q10)
5. At least once every year _____ (Skip to Q10)
6. Less often than once a year (but more than a single time) _____ (Skip to Q10)
7. Just the one time _____ (Skip to Q10)

Q9

In the last 30 days, approximately how many one-way trips did you take on Washington State Ferries?

[IF YOU TOOK A ROUND-TRIP, COUNT THAT AS A 2 ONE WAY TRIP FOR THIS QUESTION]

of One-Way Trips Last Month

Questionnaire

Q10

Over the past year, how has, if at all, the frequency with which you ride Washington State Ferries changed?

[SELECT ONE RESPONSE]

1. (No change) Just started riding the ferries this year (last 12 months) — (Skip to Q14)
2. Increased significantly over last 12 months — (Skip to Q13)
3. Increased somewhat over the last 12 months — (Skip to Q13)
4. Stayed the same / No change — (Skip to Q15)
5. Decreased somewhat over the last 12 months — (Skip to Q11)
6. Decreased significantly over the last 12 months — (Skip to Q11)
7. Have stopped riding the ferries completely — (Skip to Q12)

Q11 (OPEN)

What would you say are the primary reasons that you are riding Washington State Ferries less often?

[PRESS NEXT WHEN DONE]

(Skip to Q15)

Q12 (OPEN)

What are the primary reasons you have stopped riding Washington State Ferries completely?

[PRESS NEXT WHEN DONE]

(Skip to Q15)

Q13 (OPEN)

What would you say are the primary reasons that you are riding Washington State Ferries more often?

[PRESS NEXT WHEN DONE]

(Skip to Q15)

Q14 (OPEN)

What would you say are the primary reasons behind you just starting to ride the Washington State Ferries?

[PRESS NEXT WHEN DONE]

Q15

Based on what you know, have read, or experienced, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...

1. Very important.
2. Somewhat important.
3. Somewhat unimportant
4. Not important at all

Q16

Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

1. Very important.
2. Somewhat important.
3. Somewhat unimportant
4. Not important at all

Q17

Do you believe that the cost of daily operations (labor, fuel, etc.) should be covered by ...

1. Ferry riders only, or _____ (Skip to Q19)
2. Everyone in the state of Washington through statewide taxes, or _____ (Skip to Q19)
3. A mix of both ferry rider fares and statewide taxes?

Q18

What percent of the daily operation costs do you feel riders should pay?

Q19

What percentage of Washington State Ferries annual operational costs do you think fares currently cover?

Q20

On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

1. Two-thirds is an appropriate amount of the operating costs to be covered by ferry fares
2. Ferry fares should cover a higher percentage of operating costs
3. Ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be dedicated to support those costs - either by diverting funding from currently planned statewide transportation activities, and/or raising the statewide gas tax to support ferry operational costs.

Q21

Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. In order to pay for these needed capital investments, should the state raise the money from ...

1. Everyone in the state, or
2. Those that live in the Puget Sound Region, or
3. Only from those that use the ferries?
4. Other

Q99

Do you have any additional thoughts on our ferry or transportation system in general you would like to share?

1. No additional feedback
2. Yes, I have additional feedback

Q100

Now we would like to ask you some demographic questions so we can group your answers.

[PRESS NEXT TO DO DEMOGRAPHIC QUESTIONS AND FINISH THE SURVEY]

Weighting Scheme



- A total of 6,332 completed surveys from all parts of the state were weighted by age within each county, and the counties were weighted to their state proportion as follows:
 - The weighting was based on the Census 2000 Summary File 1 Data Population by Age, Sex, and Race/Ethnicity for Washington State and Counties prepared by Washington State Office of Financial Management (<http://www.ofm.wa.gov/census2000/sf1/tables/ctable19.htm>) .
 - The actual numbers of men and women over 18 were added together for each age groupings by county and for the state as a whole.
 - (County population over 18 / Statewide population over 18) was used to determine each “Counties weight.”
 - (County age group / County population over 18) was used to determine each “County Age Groups weight.”
 - (County weight * County Age Group weight) was used to determine the “County to State Age Groups weight.”
 - An adjustment to the “County to State Age Groups weight” was made to compensate for age groupings that we did not have any actual surveys in.
 - The “Adjusted County to State Age Group weight” was applied to each respondent in that county age group.