Washington State Transportation Commission

Voice of Washington State (VOWS) Survey Panel

June 2018 General Market Assessment of WSF

Final Report

Washington State Transportation Commission

Research Assurance LLC

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). 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 2018 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

	Page #
❖ 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	35
❖ Appendix:	
– Appendix A – Questionnaire	38
– Appendix B – Weighting Scheme	41

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, 2014 and 2016 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 1, 2018 and June 20, 2018 via the Voice of Washington State (VOWS) online panel representing residents from across all of Washington. A total of 5,419 online interviews were conducted.
- 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 borderng 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 (96%) in 2018 have ridden a Washington State Ferry (WSF) at some point in their lives. Puget Sound (PS) basin residents "ever" ridership of WSF in 2018 is 98% compared to non-Puget Sound (Non-PS) basin of 92%.

- As expected, residents living in Westside communities in PS basin have a considerable higher travel frequency on WSF than residents living in Eastside PS basin communities or in Non-PS areas.

- Non-frequent WSF travelers (riders that travel less than once a month) frequency varies greatly by location (half (53%) of non-PS residents use WSF less than once a year vs. PS Westside residents where half (55%) use WSF at least once every 3 months.

- Similar to PS Eastside (15%), non-PS basin residents use Anacortes (17%) more often than their PS Westside counterparts (1%).

- Non-PS basin residents, like their PS basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 41%) and to see friends (19%, 25%) than their PS Westside counterparts (15%, 14% respectively).

- Westside of PS respondents use the ferries for work (19%) more so than PS Eastside (2%).

Executive Summary

Travel Behavior:

- Within the PS basin, monthly riders in 2018 average 11.4 one way trips a month.
- PS Westside residents average 15.4 one-way trips per month vs. 9.4 for Eastside.

Ferry Ridership Changes:

- The change in travel behavior has remained constant between 2016 and 2018 with one in ten increasing usage, two in ten decreasing usage and three in ten staying the same in the PS basin.
- Among the 21% statewide who said they have decreased or stopped their WSF ridership, the three most frequently mentioned reasons are: “being out of the area,” (21%) “change in life style” (20%) and “ferry fares are too high” (19%).

Ferry Importance To Puget Sound:

- About nine in ten citizens statewide perceive WSF to be important to the general PS economy/growth (89%) and PS tourism (90%). The perceived economic importance of WSF is only 4 percentage points higher in PS-East (90%) than Non-PS (86%).
- The perceived importance of WSF to the PS Economy for all PS residents has remained at 90% since 2010. A higher percentage of Non-PS residents (86%) also said WSF was important to PS Economy.
- The perceived importance of WSF to PS tourism for both PS basin and non-PS residents is approximately nine out of ten.

Executive Summary

Attitudes Towards Funding:

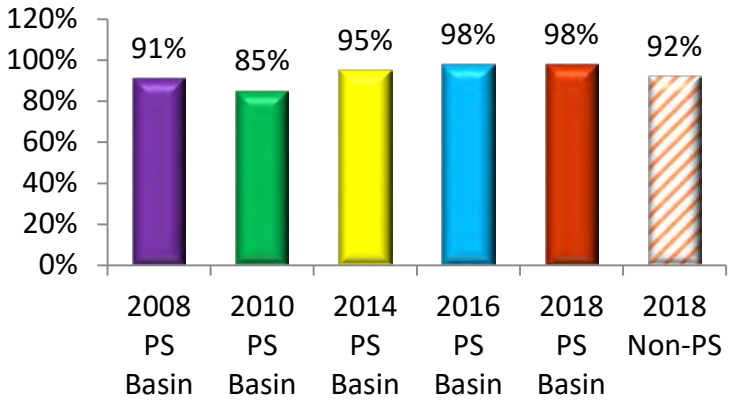
- A slightly higher percent of PS riders in 2018 (76%) as in 2016 (72%) and 2014 (70%) feel that daily operations should be paid for by a mix of rider's fares and general gas taxes.
- Non-PS residents in 2018 are more likely (41%) to say "riders only" should pay the daily operation costs than their PS counterparts (19%).
- Statewide, about seven in ten (69%) say daily operations should be paid for by a mix (riders and non-riders) and that the rider portion of costs should be 63.3%.
- Half (51%) of residents statewide in 2018 think that it is appropriate that ferry fares cover 3/4 of daily operating expenses. One out of three residents statewide (30%) in 2018 think fares should cover a higher percent than just three quarters of operating costs.
- Non-PS residents in 2018 (41%) feel riders should pay more than 3/4 of Puget Sound residents (23%).
- Statewide residents are roughly divided when it comes to who should pay for capital investments (Everyone – 31%, PS Residents – 38%, Ferry Riders – 26%).
- Seven in ten (69%) statewide feel that WSF should get the same level of funding as road/bridges.
- Non-PS residents (50%) are 20 to 30 percentage points lower on recommending same funding levels than both PS Eastside (70%) or PS Westside (82%) residents.

Detailed Study Findings

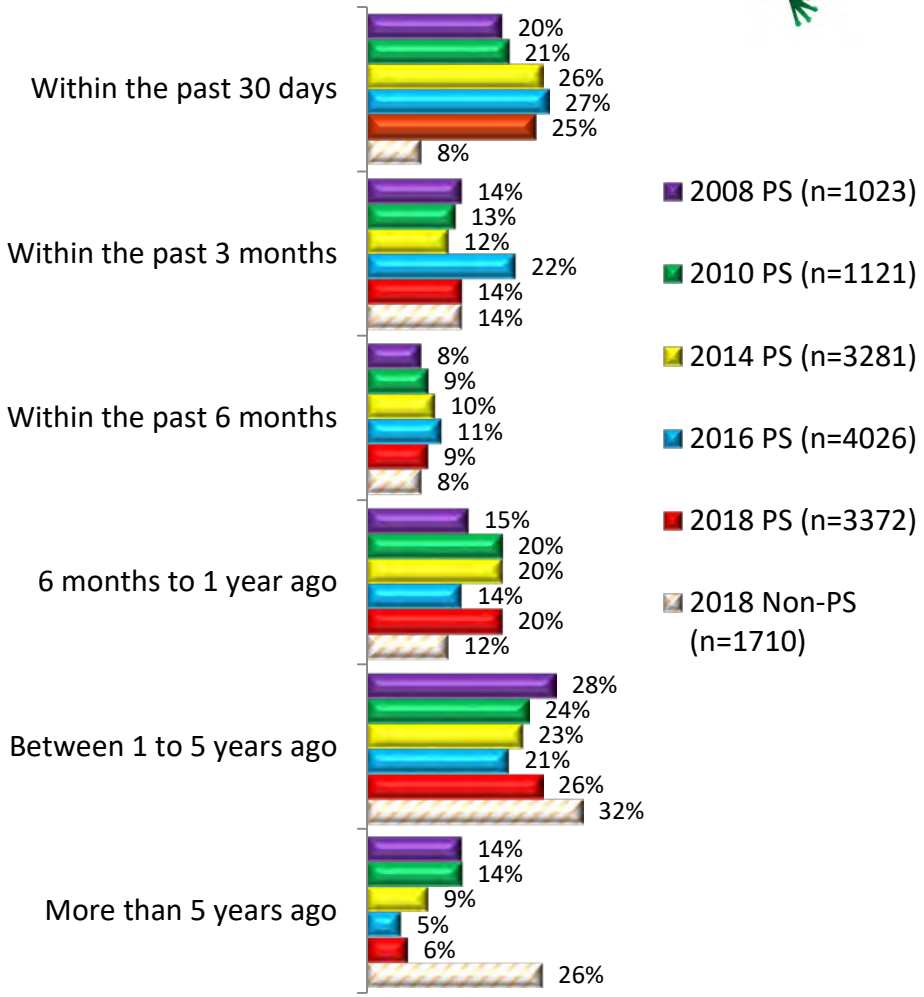
Ferry Ridership – 2008/2018

- Approximately 9 in 10 state residents (96%) in 2018 have ridden a WSF at some point in their lives.
  - Puget Sound (PS) basin residents "ever" ridership in 2018 is 98% compared to non-Puget Sound (Non-PS) basin of 92%
  - 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 (2008-2018)



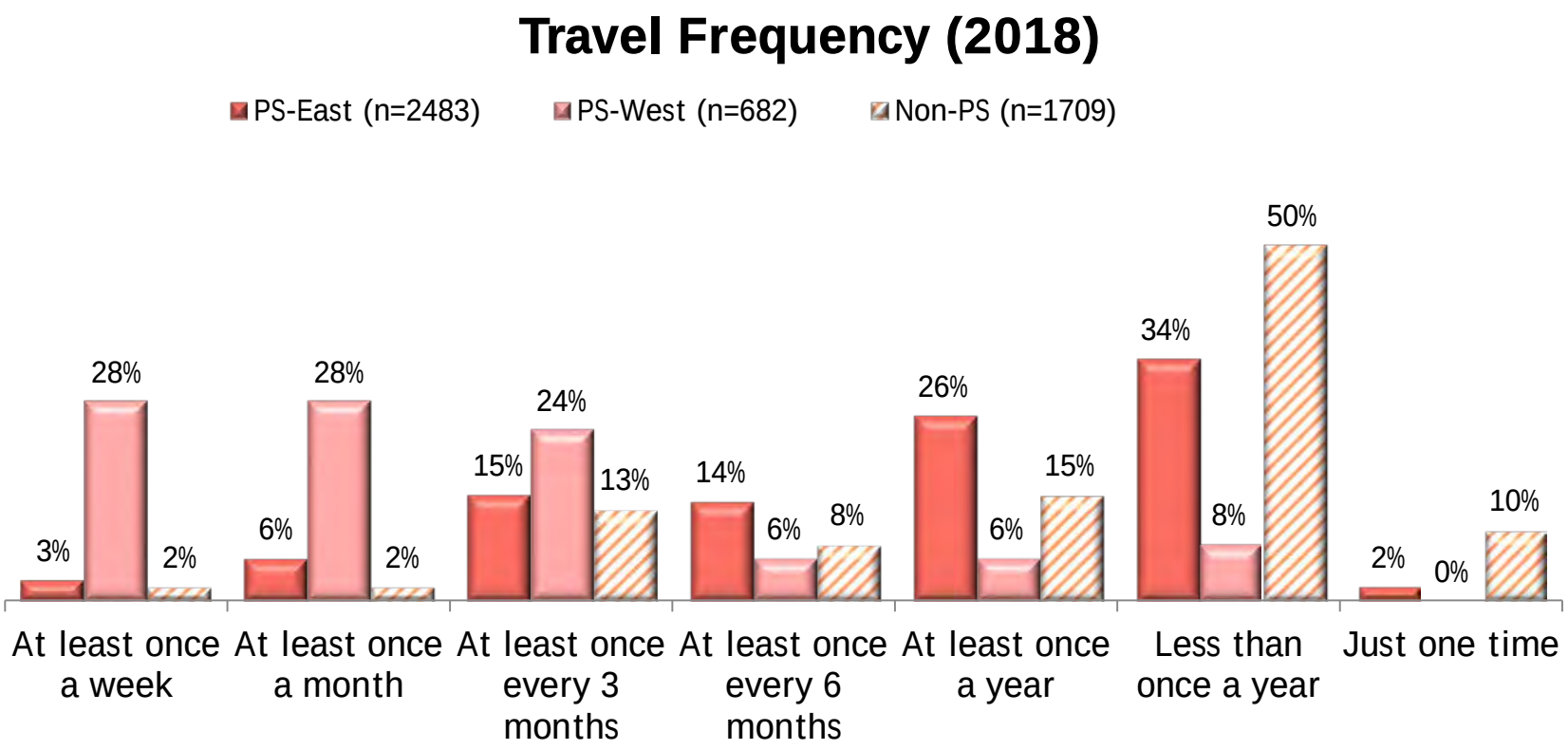
Last trip on WSF (2008-2018)



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 – 2018 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.

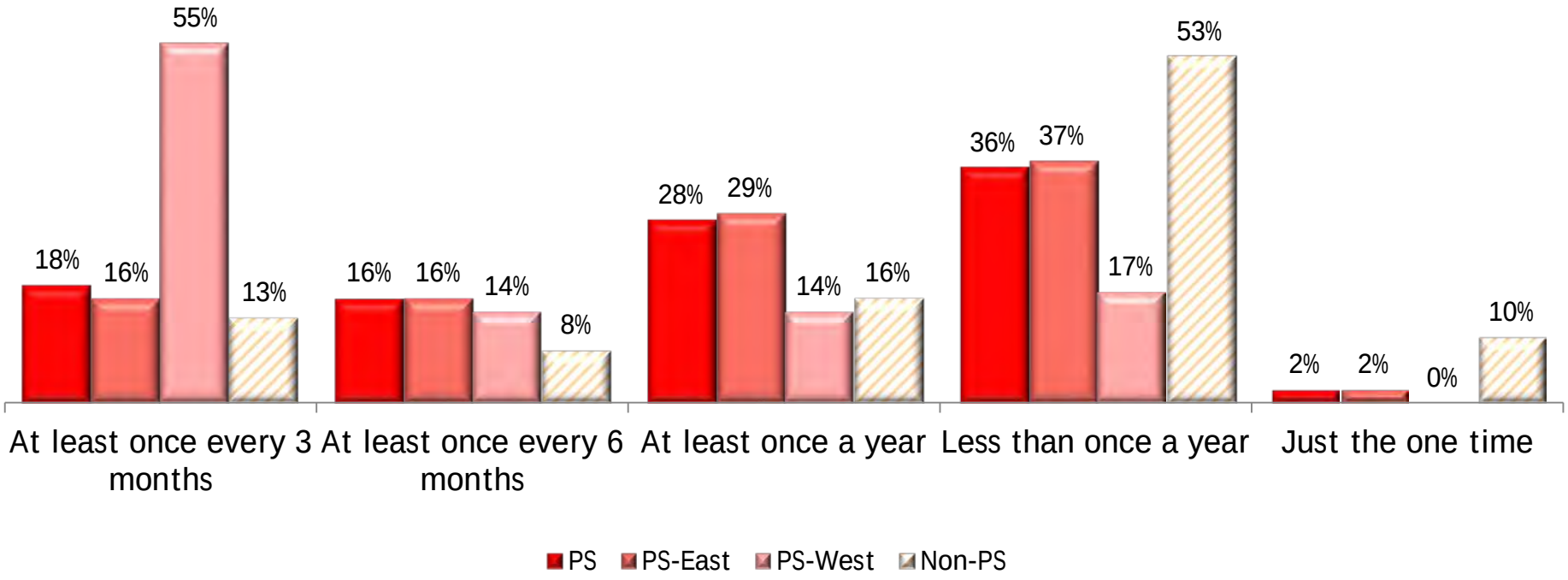


Q8 Approximately how often do you ride Washington State Ferries?

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 (53%) of non-Puget Sound residents use WSF less than once a year vs. Puget Sound Westside residents where half (55%) use WSF at least once every 3 months.

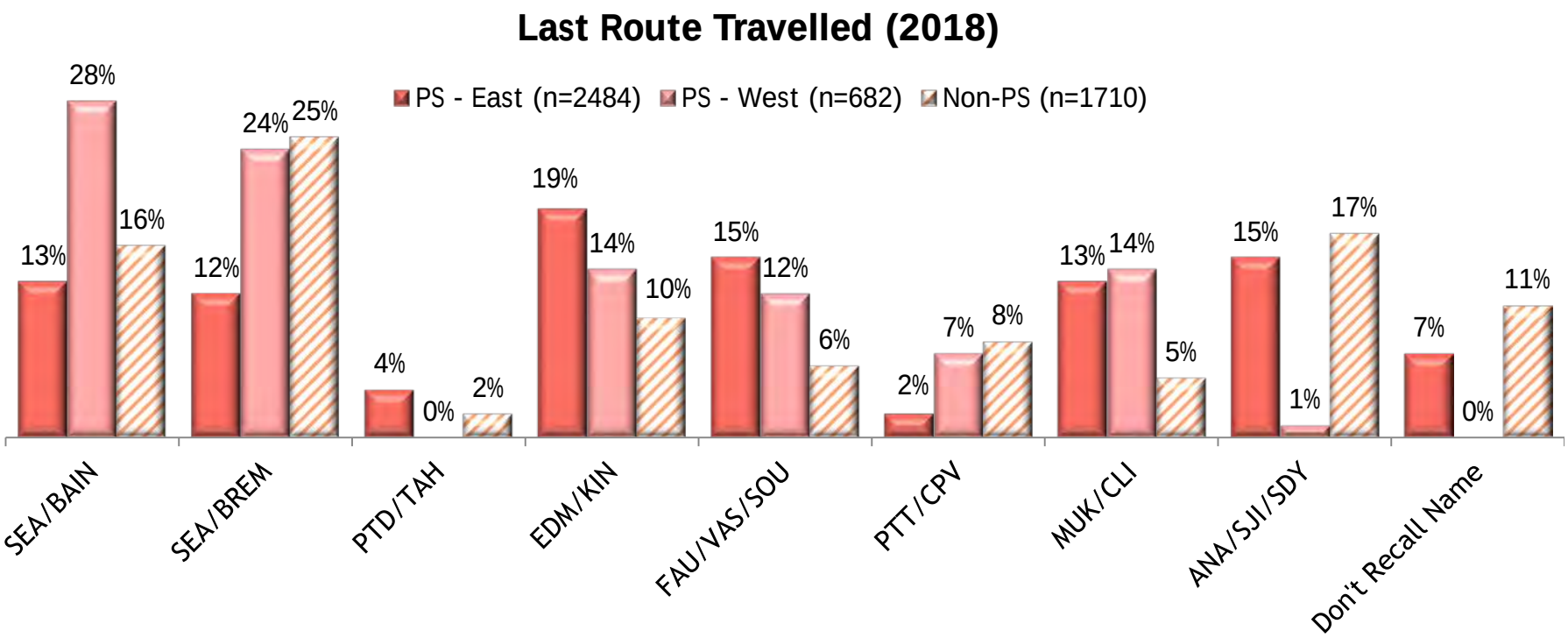
Travel Frequency by *Infrequent Riders* (2018)



Q8 Approximately how often do you ride Washington State Ferries?

Last Route Travelled - 2018

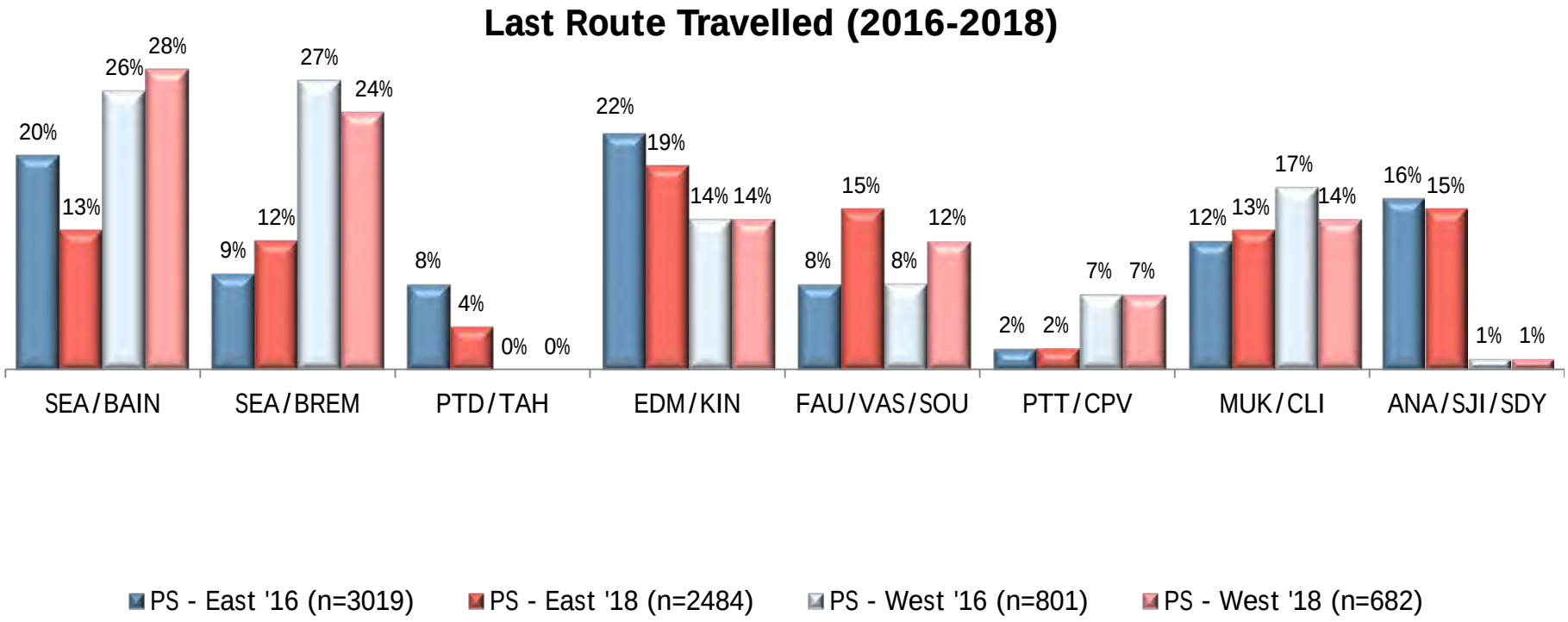
- Residents in Westside Puget Sound basin communities tend to use Bainbridge (28%) and Bremerton (24%) more than their Eastside PS counterparts (13%, 12% respectively).
- Non-Puget Sound basin residents use Anacortes (17%) more often than their Westside Puget Sound counterparts (1% Westside).



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

Last Route Travelled – P.S. Comparison

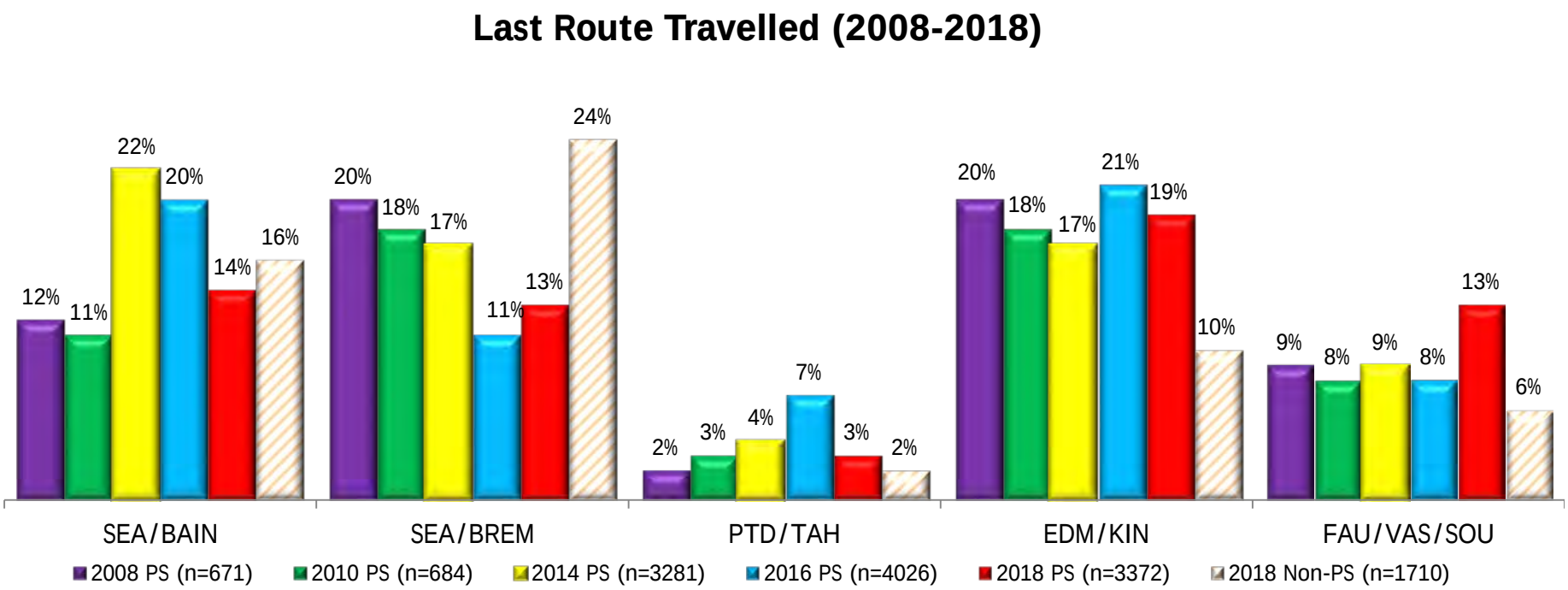
- Eastside residents used Seattle/Bainbridge less often in 2018 (13%) than in 2016 (20%).
- Westside residents are using all routes about the same as in 2016.



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

Last Route Travelled – 2008-2018

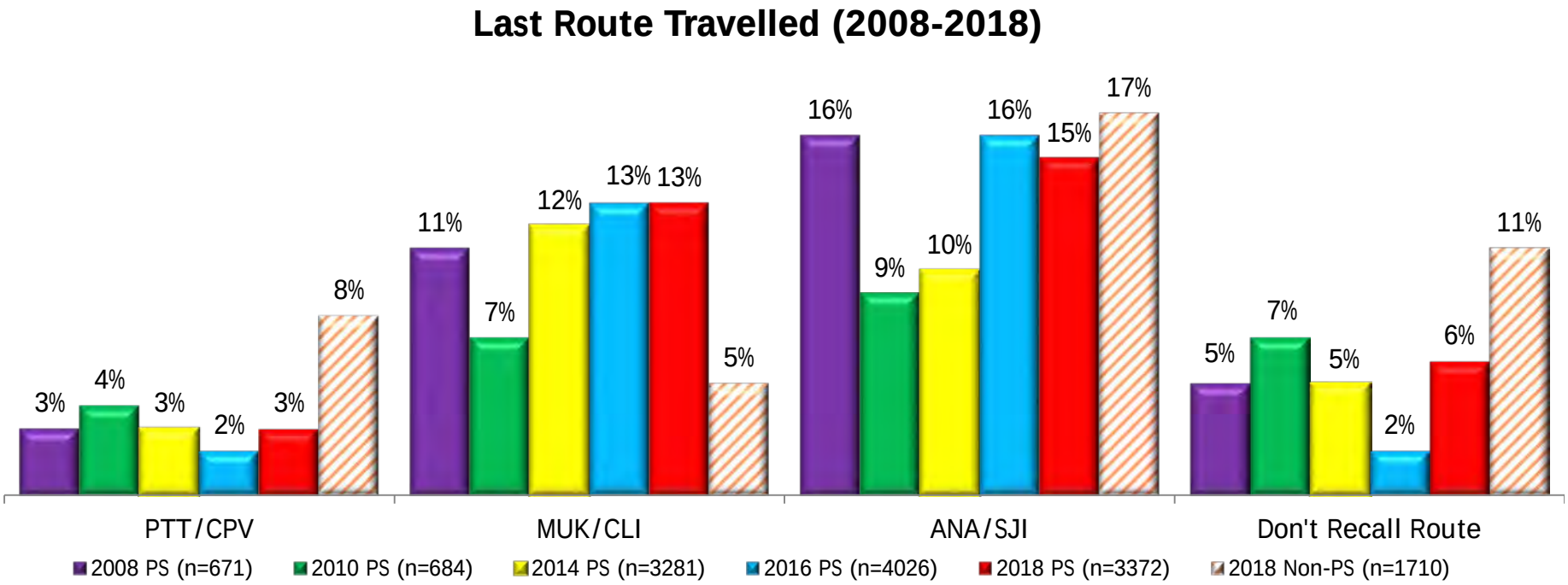
- Puget Sound residents reported riding Bainbridge (14%) less and Fauntleroy (13%) more in 2018 than in 2016 (20%, 8% respectively).
- Non-Puget Sound residents use Bremerton (24%) and Port Townsend/Coupeville (8%) more often and Mukilteo (5%) less often than their Puget Sound counterparts (13%, 3%, 13% respectively).



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

Last Route Travelled – 2008-2018

- Puget Sound residents reported riding Bainbridge (14%) less and Fauntleroy (13%) more in 2018 than in 2016 (20%, 8% respectively).
- Non-Puget Sound residents use Bremerton (24%) and Port Townsend/Coupeville (8%) more often and Mukilteo (5%) less often than their Puget Sound counterparts (13%, 3%, 13% respectively).



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

All Routes Ever Travelled - 2018

- As seen below, a majority of Puget Sound residents have travelled on Seattle/ Bainbridge (69%), Edmonds/Kingston (65%), Seattle/Bremerton (59%), Mukilteo/Clinton (54%) and Anacortes (53%) at some point in their lives.

Puget Sound Basin Residents (2018)

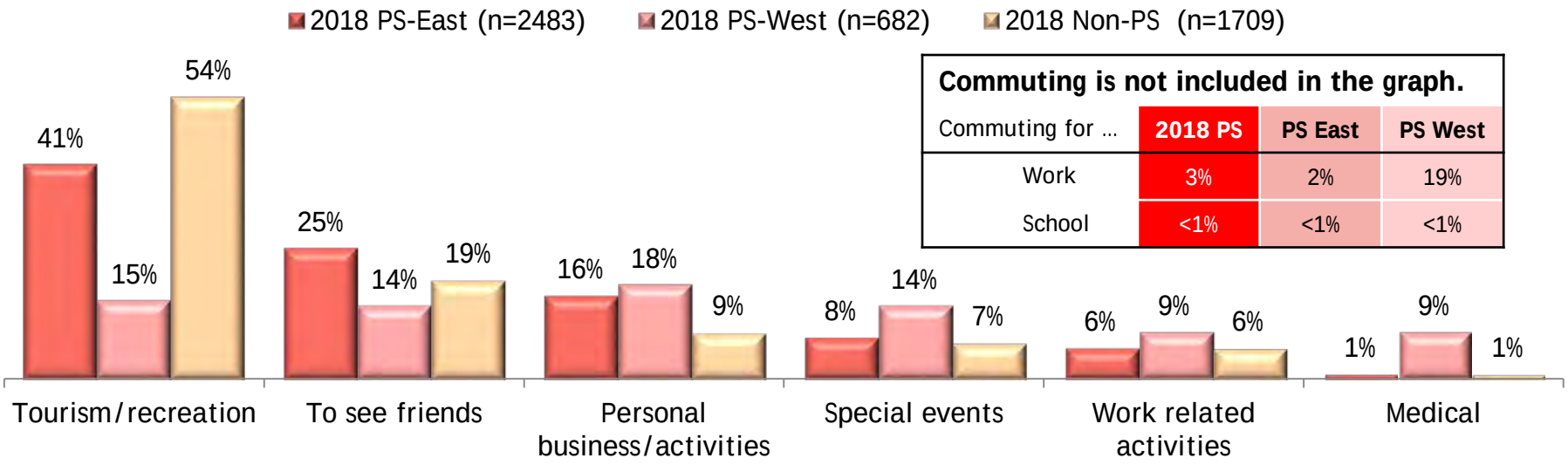
	PS *(n=3371)*		PS East *(n=2483)*		PS West *(n=682)*	
	Total	Last	Total	Last	Total	Last
SEA/BAIN	69%	14%	68%	13%	78%	28%
SEA/BREM	59%	13%	57%	12%	80%	24%
PTD/TAH	22%	3%	23%	4%	15%	0%
EDM/KIN	65%	19%	63%	20%	83%	14%
FAU/VAS	40%	9%	41%	10%	35%	2%
FAU/SOU	25%	3%	23%	3%	47%	9%
SOU/VAS	20%	1%	19%	2%	32%	0%
PTT/CPV	44%	3%	41%	2%	68%	7%
MUK/CLI	54%	13%	55%	13%	51%	14%
ANA/SJI	53%	11%	53%	11%	53%	1%
Inter SJI	37%	2%	37%	2%	35%	0%
Sidney	26%	2%	25%	2%	28%	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 - 2018

- Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 41%) and to see friends (19%, 25%) than their Westside counterparts (15%, 14% respectively).
- Those living on the Westside use the ferries for work (19%) and medical (9%) more so than Puget Sound Eastside (2%, 1%) residents.

Most Frequently Mentioned Trip Purpose (2018)



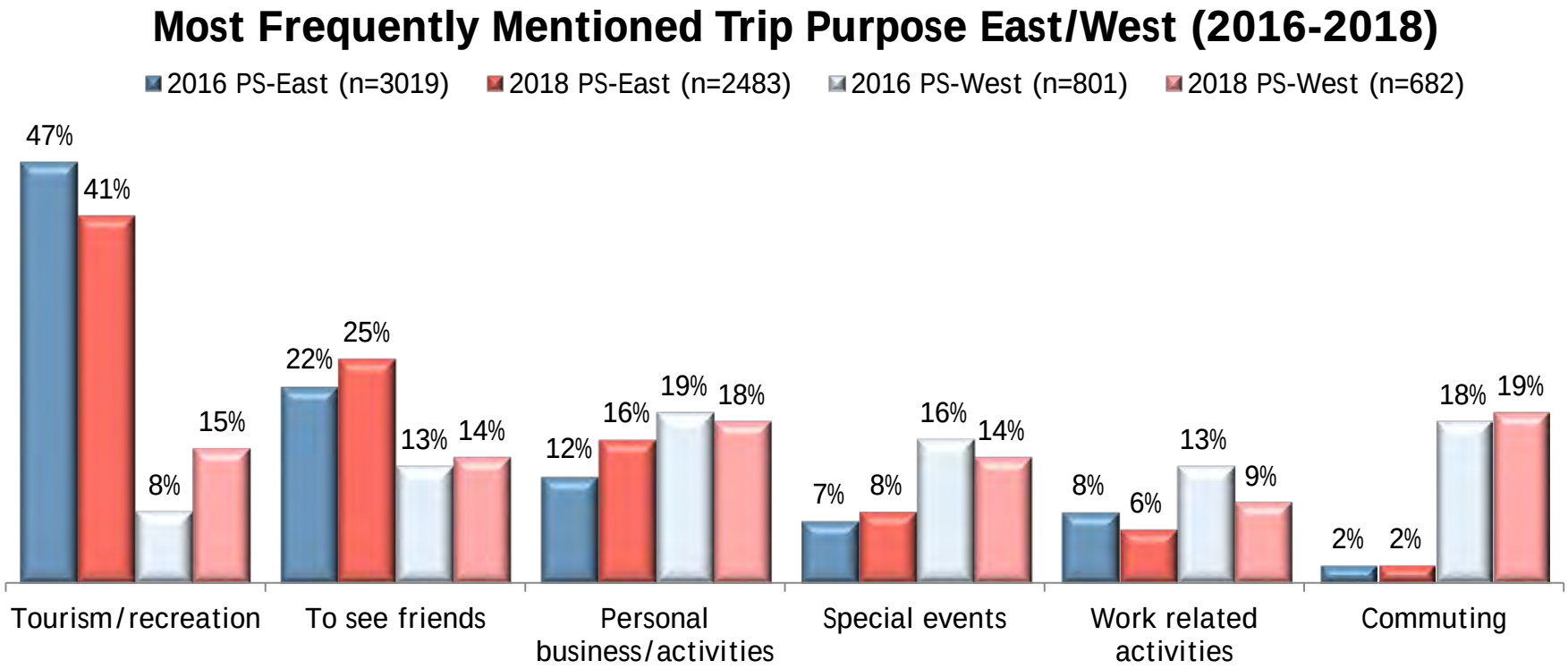
Commuting is not included in the graph.

Commuting for ...	2018 PS	PS East	PS West
Work	3%	2%	19%
School	<1%	<1%	<1%

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

- Puget Sound eastside residents use ferries less for recreational purposes in 2018 (41%) than 2016 (47).
- Puget Sound westside residents use more for recreational purposes in 2018 (15%) than 2016 (8%).

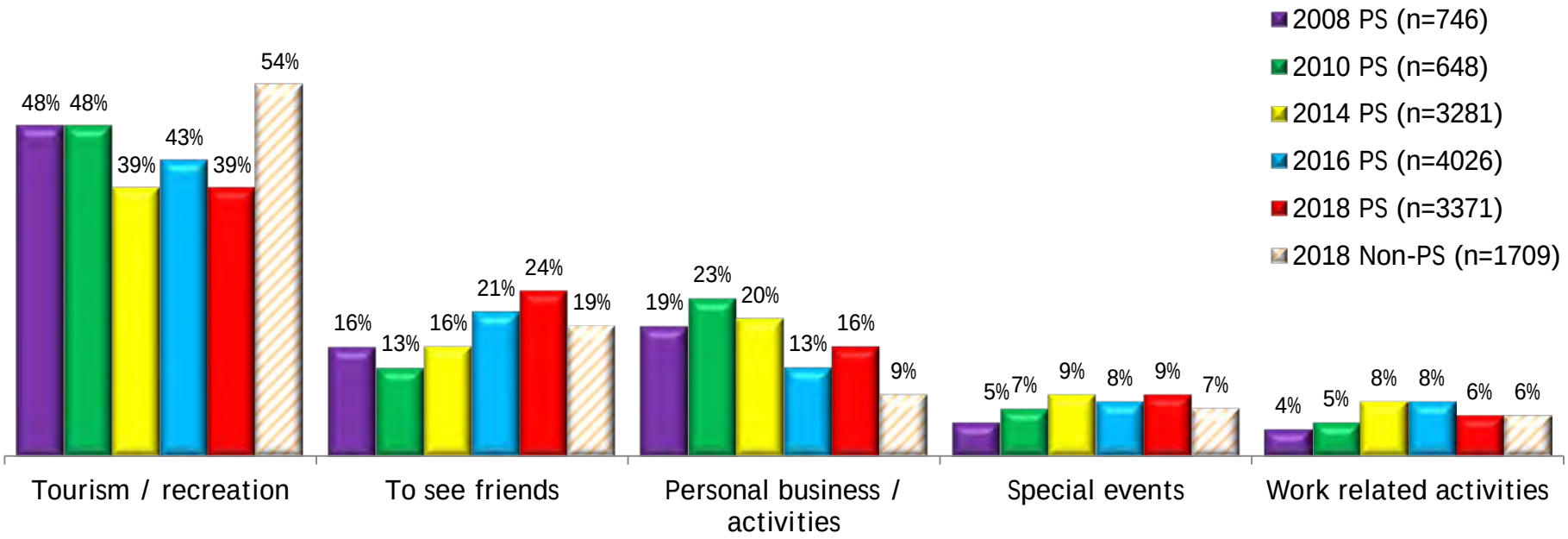


Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

Last Trip Purposes – 2008-2018

- Travelling on WSF for Tourism/Recreation for Puget Sound residents has remained right around 40% since 2014
- Tourism / recreation is the dominate reason for both Puget Sound (39%) and non-Puget Sound residents (54%) using WFS.

Most Frequent Mentioned Trip Purpose (2008-2018)

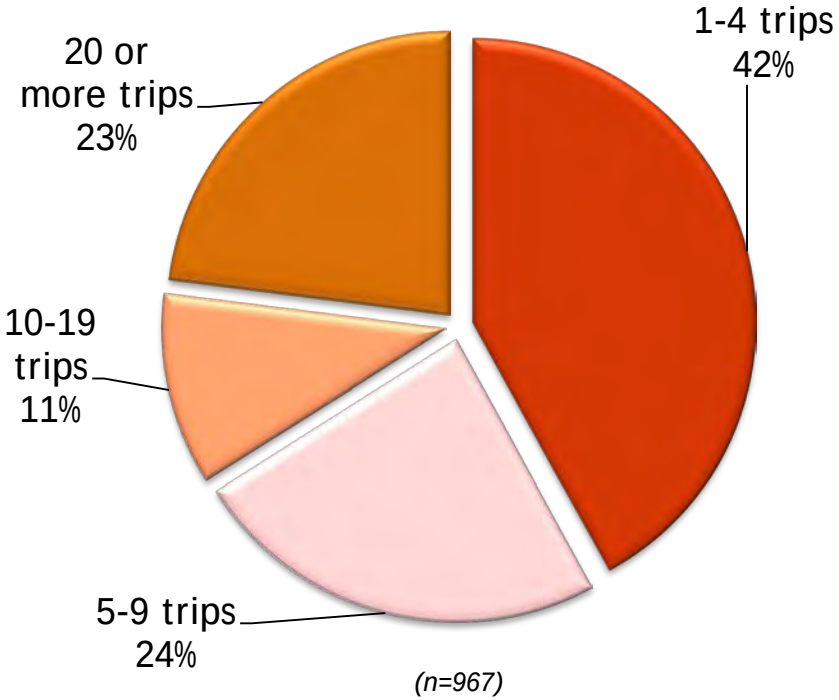


Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

Travel Behavior – 2018 Monthly Riders

- Those statewide residents that use the ferries at least once a month make on average 11.7 one way trips a month.
- PS Westside residents who travel monthly make considerably more trips (15.4 one way trips per month) than their Eastside PS counterparts (9.4 one way trips).

Number of 1-way Trips Taken in Past 30 Days (2018 Statewide Monthly Riders)



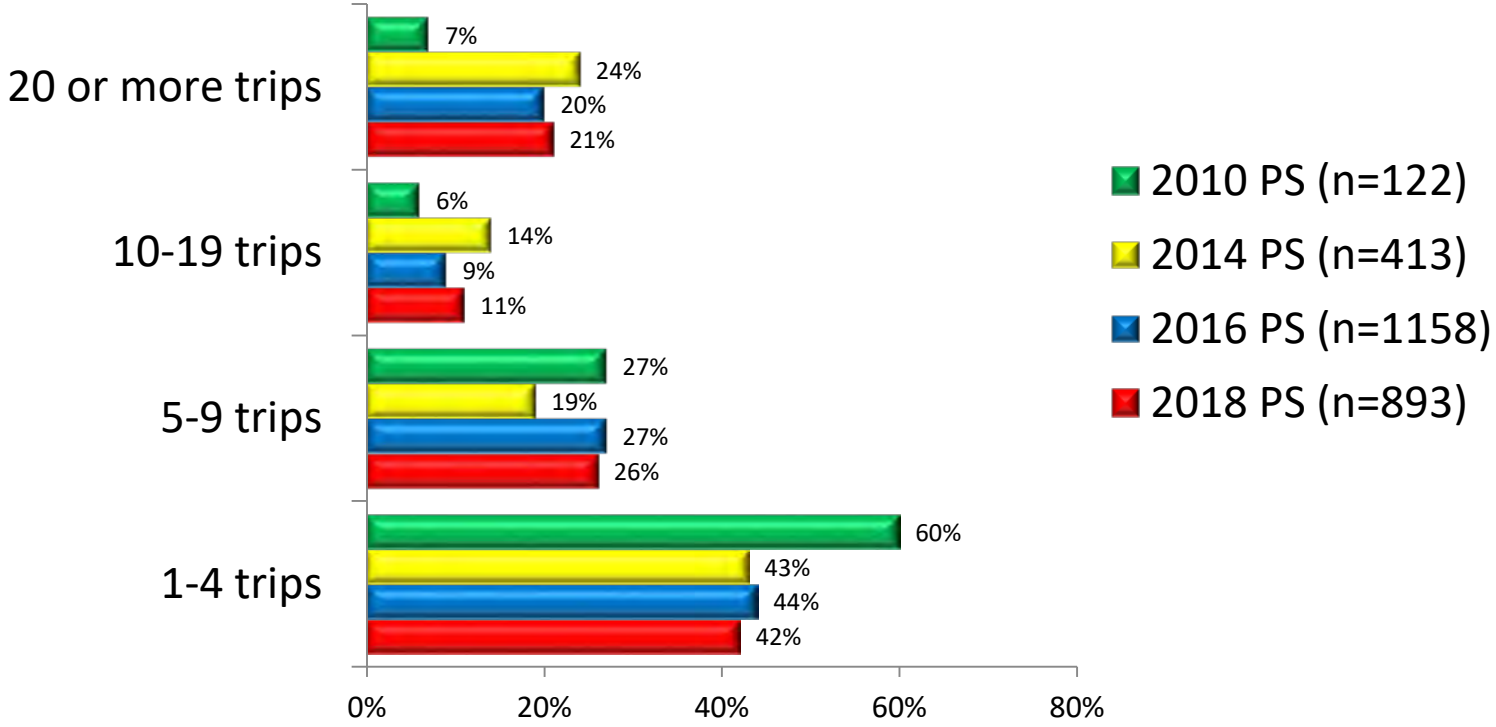
(n=967)
Travelled at least once in the past 30 days)

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 – 2010-2018 Monthly Riders

- Within the Puget Sound basin, monthly riders in 2018 (11.4 average one way trips) make more one way trips than was reported in 2010 (5.7 average one way trips).

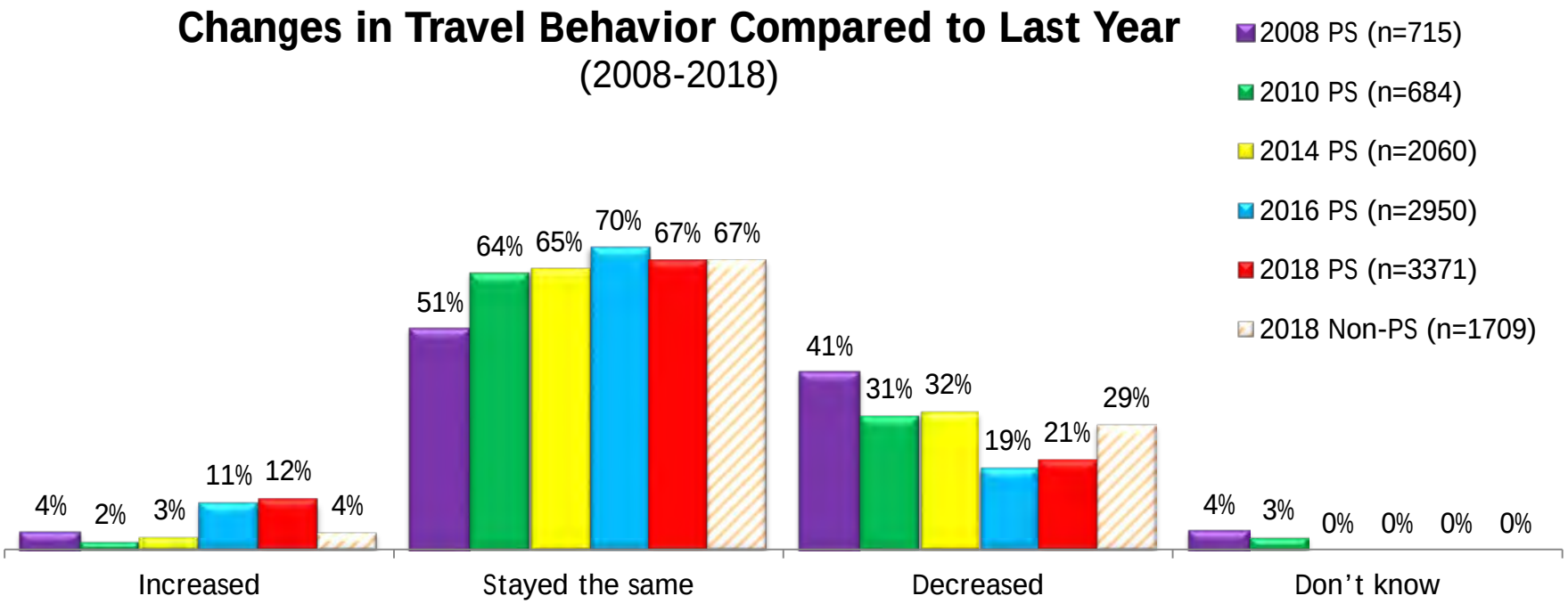
Number of 1-way Trips Taken in Past 30 Days (2010-2018)



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

- The change in travel behavior has remained constant between 2016 and 2018 with one in ten increasing usage, two in ten decreasing usage and three in ten staying the same in the Puget Sound basin.
- About one in three (29%) 2018 non-Puget Sound basin riders say their WSF travel behavior has decreased over last year compared to 33% in 2016.

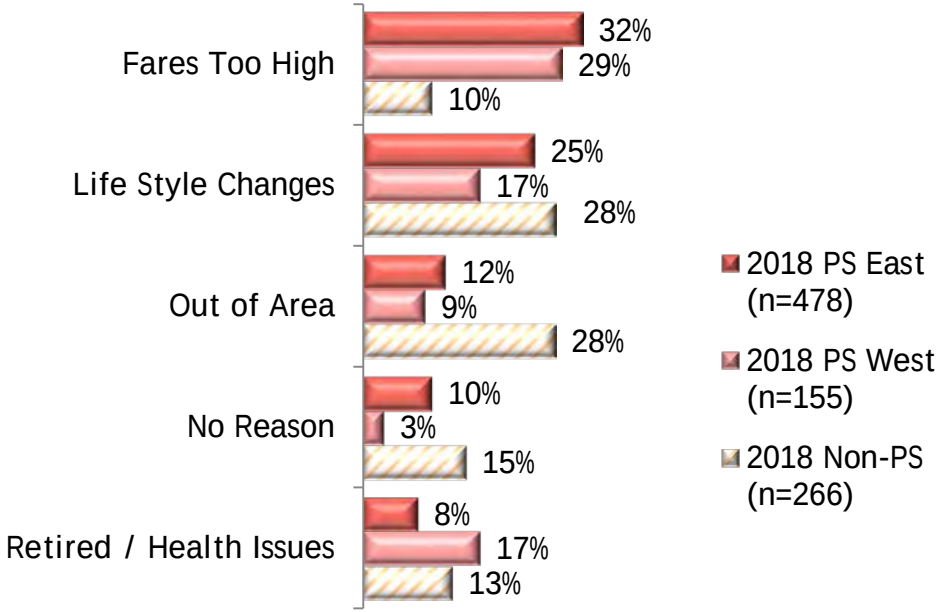


Q10 Over the past year, would you say the frequency with which you ride Washington State Ferries has… [READ LIST]

Reason For Riding Less - 2018

- Among the 21% (n=1,477) statewide who say they have decreased or stopped their ridership of WSF, the three most frequently mentioned reasons for riding less frequently or stopping are: "out of the area" (21%), "change in life style" (20%), and "ferry fares are too high" (19%).

Main Reasons for Riding Less:
(but not stopping totally)



- Among the 9% (n=545) statewide who have stopped riding completely, the main reasons for doing so are:
  - 31% Out of area
  - 29% No Reason / No need
  - 15% Life style changes
  - 12% Fares too high

- Among the 9% (n=403) statewide who have increased their ridership of WSF, the main reasons for doing so are:
  - 63% Recreational outings
  - 51% Life style changes
  - 41% Work / School changes
  - 9% Retirement

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

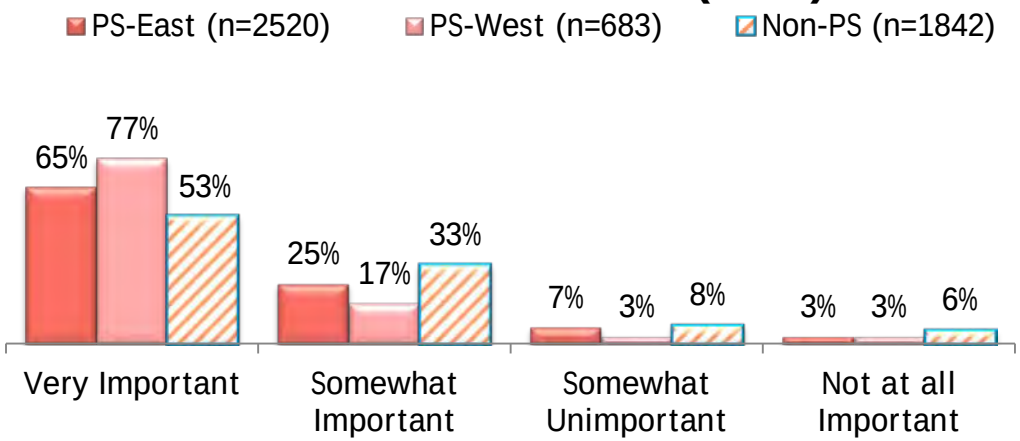
Q12 What is the primary reason you have stopped riding Washington State Ferries completely?

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

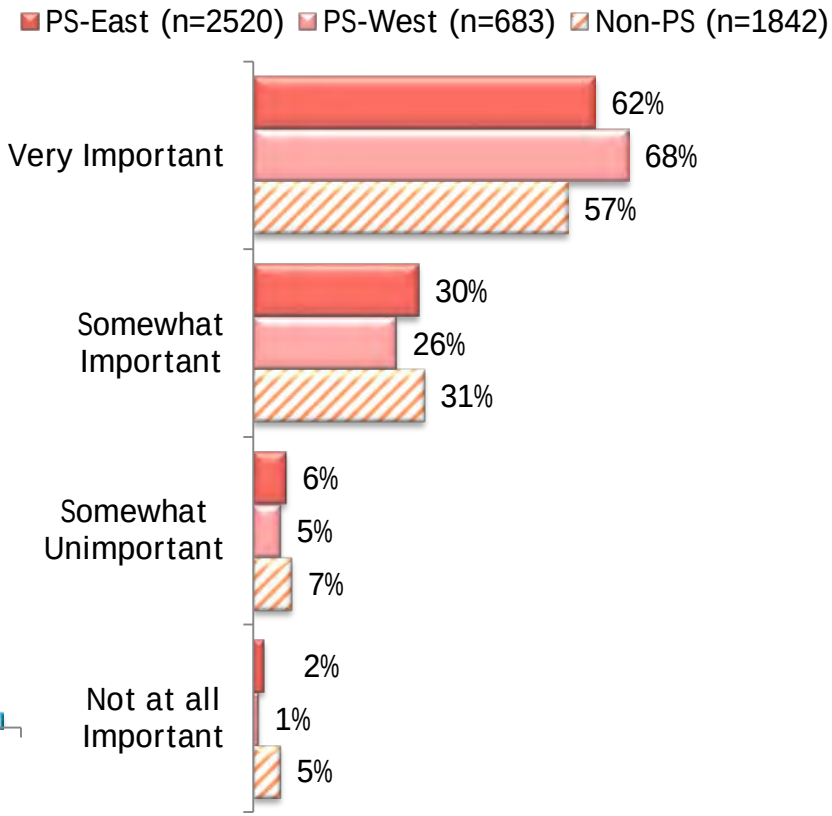
WSF Importance - 2018

- About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (89%) and PS tourism (90%).
- The perceived economic importance of WSF is only 4 percentage points higher in PS-East (90%) than Non-PS (86%).

Importance of WSF to Economy and Growth of the PS Basin (2018)



Importance of WSF to Encouraging Tourism in PS Basin (2018)



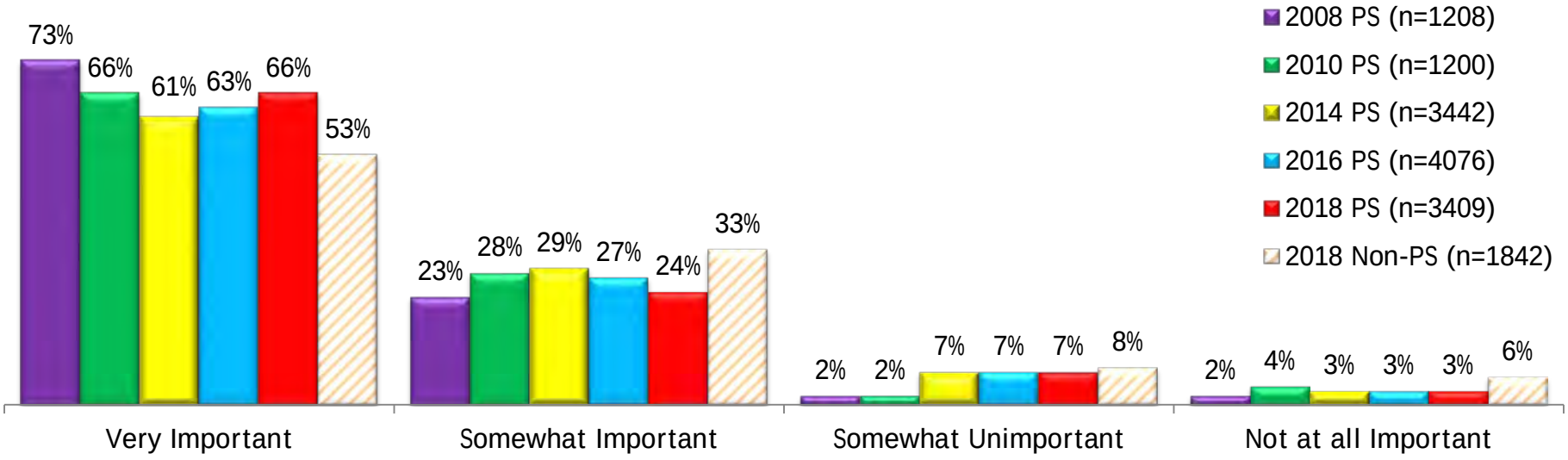
Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say…

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 – 2008-2018

- The perceived importance of WSF to the Puget Sound Economy for all PS residents has remained at 90% since 2010.
- Eight out of ten Non-PS residents say WSF is important to the economy of PS (86%).

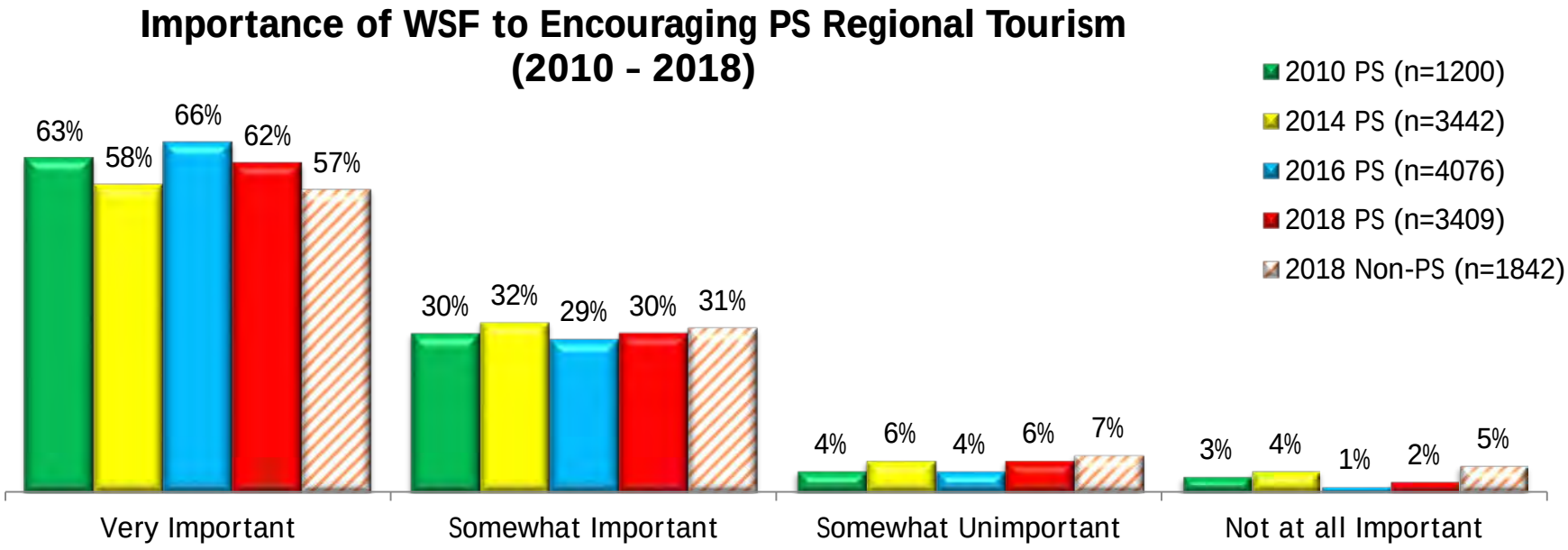
Importance of WSF to PS Regional Economy and Growth (2008-2018)



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 – 2010-2018

- The perceived importance of WSF to Puget Sound tourism for all PS residents has remained at nine out of ten since 2010 (93%, 90% - 2014, 95% - 2016, 92% - 2018).
- Eight out of ten Non-PS residents say WSF is important to encouraging PS tourism (88%).

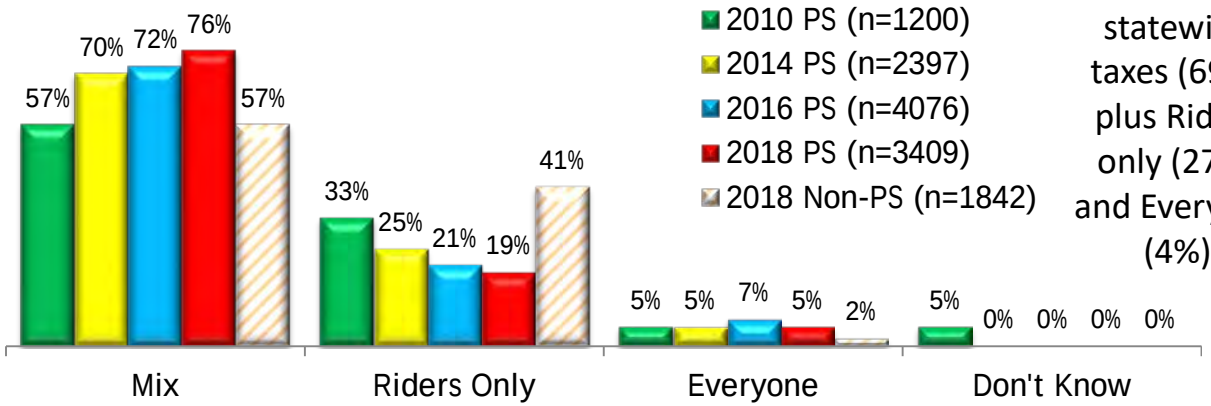


Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say…

Operations Funding – 2010-2018

- Slightly more PS riders in 2018 (76%) than in 2016/14 (72%/70%) feel that daily operations should be paid for by a mix of rider's fares and gas taxes.
- Non-PS residents in 2018 as in 2016 are more likely (41%, 39%) to say "riders only" should pay the daily operation costs than their Puget Sound counterparts (19%, 21%).
- Statewide, about seven in ten (69%) say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 63.3%.

How WSF Daily Operations Should Be Funded (2010 - 2018)



Statewide
Mix of rider fees and statewide taxes (69%) plus Riders only (27%) and Everyone (4%)

In 2018 citizens statewide suggested ferry riders should pay on average 63.3% of WSF's daily operating costs (58.2% PS, 71.6% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 58.9%
- In comparison PS Westside residents said 51.6%, while Island dependent residents said 34.6%.

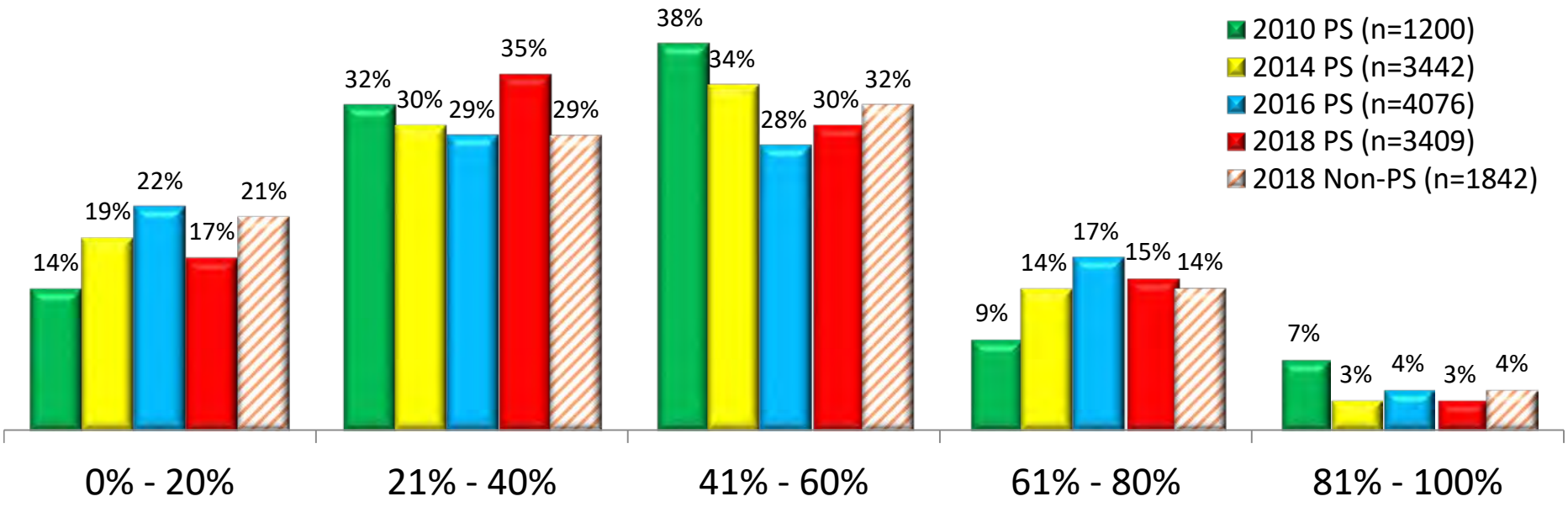
Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:

Q18 What percent of the daily operation costs do you feel riders should pay?

Operations Funding – 2010-2018

- On average, 2018 Puget Sound residents think that fares cover 43.1% of WSF's annual operating expenses (Eastside 42.6% vs. 48.4% Westside vs. 41.6% Non-PS regions).
- The average perception of how much fares cover has changed little between 2010 and 2018 within the Puget Sound basin.

How Much Do Fares Cover of Annual Operating Costs (2010-2018)



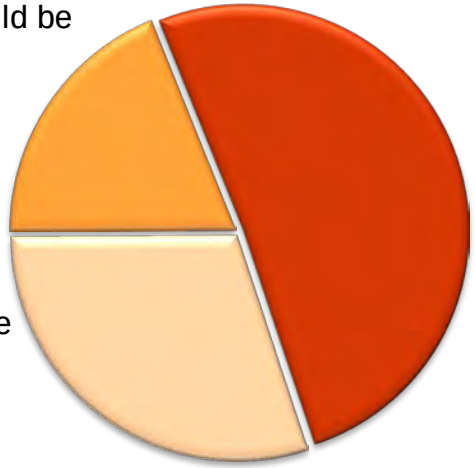
Q19 What percentage of WSF's annual operational costs do you think fares currently cover?

Fare Coverage - 2018

- Half (51%) of residents statewide in 2018 think that it is appropriate that ferry fares cover 75% of daily operating expenses.
- Almost one out of three residents statewide (30%) in 2018 think fares should cover a higher percent than just 75% of daily operating costs.

How Much Should Fares Cover of Annual Operating Costs (2018 Statewide)

Ferry fares should cover a **lower** percentage of operating costs and more gas tax dollars should be used to support ferry operational costs.
19%



75% is an **appropriate amount** of the operating costs to be covered by ferry fares.
51%

Ferry fares should cover a **higher** percentage of operating costs.
30%

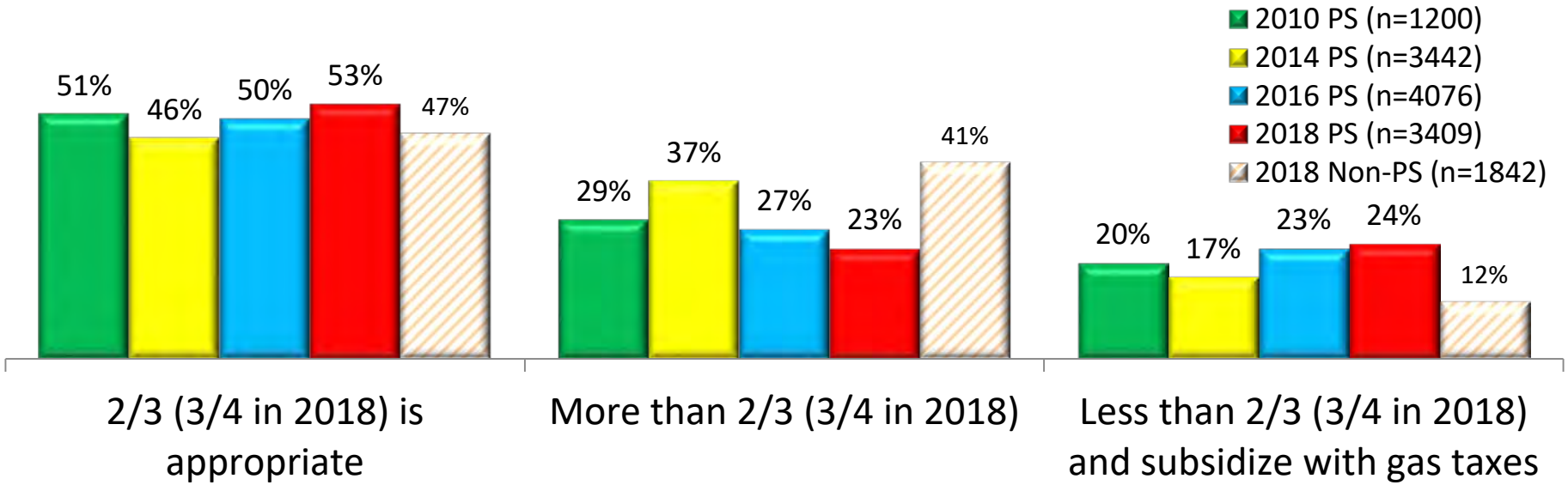
(n=5251)

Q20 On average, fares cover about 75% (three quarters) of the ferries' yearly operating costs. The other 25% (one-quarter) 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 – 2010-2018

- There is little change in what citizens feel is an appropriate farebox recovery at either the 2/3 or 3/4 cost of annual operations rates.
- Over four in ten (41%) Non-PS residents feel riders should pay more than 75% of the daily operating costs (down slightly from 43%).
- One-in-four PS residents feel riders should pay more (23%) while one-in-four feel they should pay less (24%) than 75% of the daily operating costs.

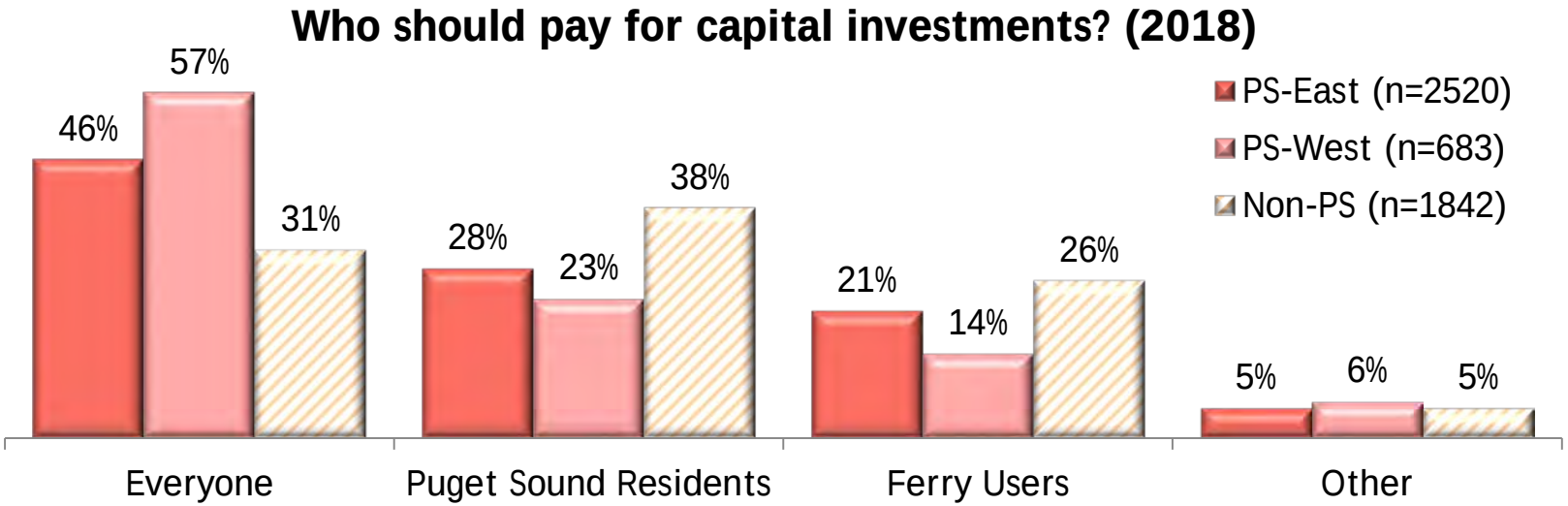
How Much Should Fares Cover of Annual Operating Costs



Q20 On average, fares cover about 75% (three-quarters) of the ferries' yearly operating costs. The other 25% (one-quarter) 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 - 2018

- Similar to 2016, 2018 non-Puget Sound residents are divided roughly in thirds when it comes to who should pay for capital investments (Everyone – 31%, PS Residents – 38%, Ferry Riders – 26%) but lean towards PS residents paying.
- Westside residents are significantly more likely to say "everybody" should pay for capital improvements (57%), compared to Eastside (46%) and non-Puget Sound Basin (31%) residents.

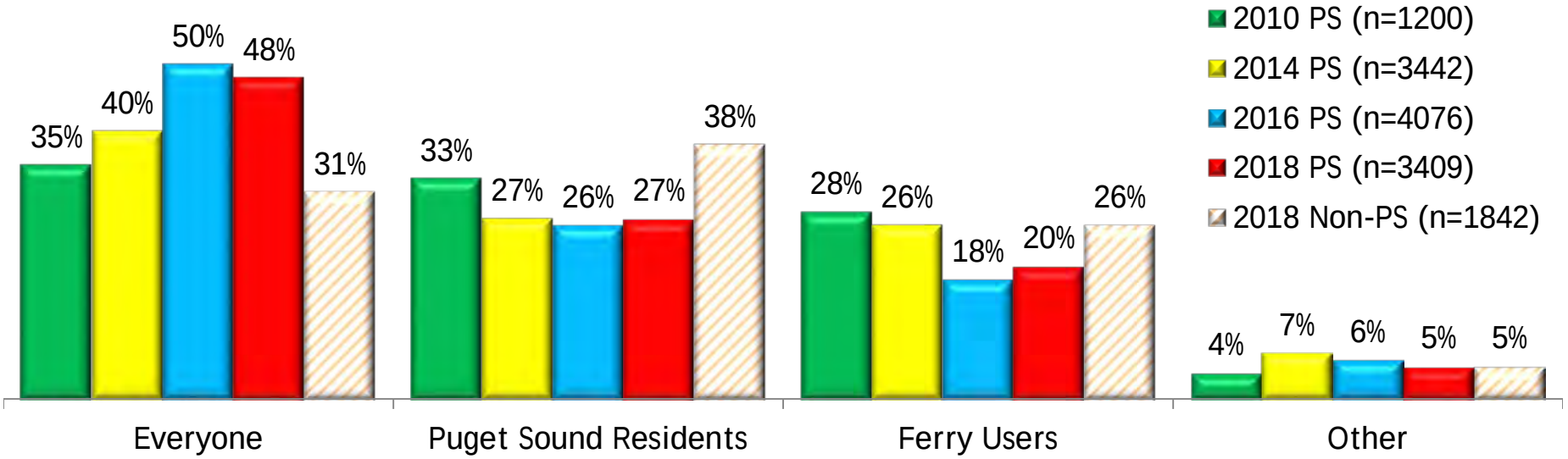


Q21 Daily ferry operations are one cost, and they are covered about 75% by ferry fares and 25% by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. Like how capital investments in roads and bridges are paid for, funds can come from statewide gas taxes, regional taxes or local usage tolls. In order to pay for needed capital investments in the ferry system should the state raise the money from …

Capital Funding – 2010-2018

- In 2018 as in 2016, non-Puget Sound residents are more likely to say "Puget Sound Residents" should pay for capital investments (38% - 2018, 36% - 2016) than their PS counterparts in either 2018 (27%) or 2016 (26%).

Who should pay for capital investments? 2010-2018

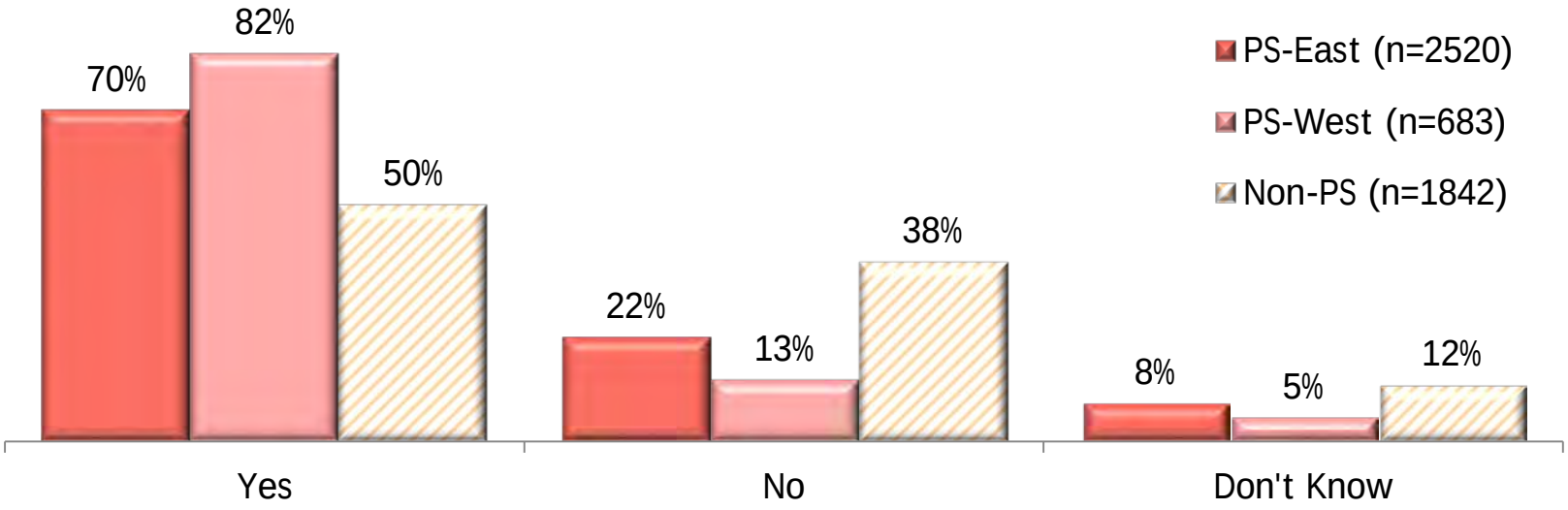


Q21 Daily ferry operations are one cost, and they are covered about 75% by ferry fares and 25% by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. Like how capital investments in roads and bridges are paid for, funds can come from statewide gas taxes, regional taxes or local usage tolls. In order to pay for needed capital investments in the ferry system should the state raise the money from …

Capital Funding Level - 2018

- Fifty percent or greater of all major regional groups feel funding for replacing old ferries and improving terminals should get the same level of statewide funding as replacing old bridges and improving highways.
- Non-Puget Sound residents (50%) are 20 to 30 percentage points lower on recommending same funding levels than both as PS-East (70%) or PS-West (82%) residents.

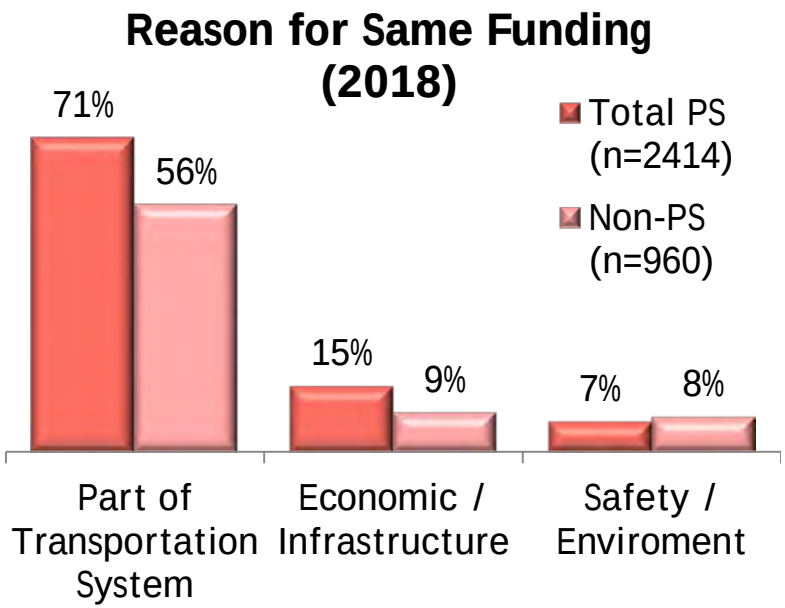
Same Funding of Old Ferries / Improving Terminals as Old Bridges / Improving Highways (2018)

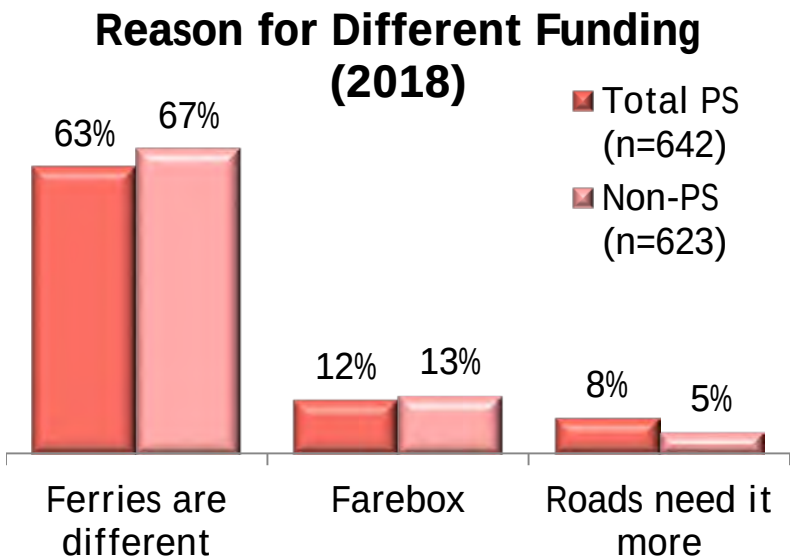


Q22 Should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways?

Capital Funding Level Reason - 2018

- The major reason for recommending the same funding level is that WSF is part of the overall transportation system in Washington and should be funded equally with roads/bridges.
- The major reason for recommending different funding levels is that WSF is different than general roads/bridges as it carries a smaller percent of the state traffic and thus roads/bridges should get higher funding priority.





Q23 Why do you feel that way (regarding their answer to should the replacing of old ferries and improving terminals get the same level of statewide funding as replacing of old bridges and improving highways)?

Demographics

- The panel in 2014, 2016 and 2018 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)*	2018 PS *(n=3489)*	2018 Non-PS *(n=1930)*
Gendr						
Male	49%	49%	61%	61%	68%	64%
Female	51%	51%	39%	39%	32%	36%
Household Size						
Single person	15%	13%	17%	17%	18%	16%
Multiple people	85%	83%	83%	83%	82%	84%
Average household size	3.0	3.2	2.7	2.6	2.6	2.6
Household with children	40%	55%	35%	30%	29%	34%
Single child	17%	23%	16%	12%	14%	16%
Multiple children	43%	22%	19%	18%	15%	17%
Age						
18-34	28%	29%	31%	38%	36%	19%
35-54	41%	40%	43%	32%	34%	36%
55 or older	30%	28%	26%	30%	30%	45%

Demographics

- The panel in 2018, 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)*	2018 PS *(n=2866)*	2018 Non-PS *(n=1581)*
Education						
HS graduate or less	19%	20%	5%	6%	13%	13%
Some college/technical school	36%	26%	33%	32%	30%	33%
College degree or higher	45%	49%	63%	59%	57%	54%
Employment						
Full-time	49%	41%	68%	60%	60%	54%
Part-time	13%	8%	7%	7%	7%	8%
Income						
Less than $35,000	13%	13%	15%	17%	16%	20%
$35,000 - $74,999	42%	30%	30%	29%	23%	36%
$75,000 or more	45%	31%	55%	54%	61%	44%

Appendix

Questionnaire

2018 WSF General Market/Statewide Usage Survey Final v4
(USING VOWS PANEL - Web 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)
3. Don't want to take this particular survey ……(SKIP TO Q99)

Q2
Approximately in what year did you take your FIRST ever ride on a Washington State Ferry?
[YOUR BEST GUESS]

1. 2018
2. 2017
3. 2016
4. 2015
5. 2014
6. 2013
7. 2012
8. 2011
9. 2010
10. 2009
11. 2008
12. 2007
13. 2006
14. 2005
15. 2004
16. 2003
17. 2002
18. 2001
19. 2000
20. 1999
21. 1998
22. 1997
23. 1996
24. 1995
25. 1994
26. 1993
27. 1992
28. 1991
29. 1990
30. 1989
31. 1988
32. 1987
33. 1986
34. 1985
35. 1984
36. 1983
37. 1982
38. 1981
39. 1980
40. 1979
41. 1978
42. 1977
43. 1976
44. 1975
45. 1974
46. 1973
47. 1972
48. 1971
49. 1970 and past
50. 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
2. Seattle / Bremerton
3. Point Defiance / Tahlequah
4. Edmonds / Kingston
5. Fauntleroy / Vashon
6. Fauntleroy / Southworth
7. Vashon / Southworth
8. Coupeville / Port Townsend
9. Mukilteo / Clinton
10. Anacortes / San Juans
11. San Juans Interisland (Includes Shaw, Orcas, Lopez, and Friday Harbor)
12. Anacortes or San Juans / Sidney
13. Don't recall the name of the route
14. Never been on a Washington State Ferry (Skip to Q15)

Q5 (MULTIPLE)
Besides ${custom1}, what other Washington State Ferries routes, if any, have you ever taken?
[SELECT ALL THAT APPLY]

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

Q6
You said your last ferry ride was on the ${custom1} ferry. What was your primary purpose for that particular trip?
[SELECT ONE]

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

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

Questionnaire

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 TRIPS FOR THIS QUESTION]

# of One-Way Trips Last Month

_____

Q10
Over the past year, how has, if at all, the frequency with which you ride Washington State Ferries changed?
[SELECT ONE RESPONSES]

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?

_____ (1-99)

Q19
What percentage of Washington State Ferries annual operational costs do you think fares currently cover?

_____ (0-100)

Q20
On average, fares cover about 75% (three-quarters) of the ferries' yearly operating costs. The other 25% (one-quarter) 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. 75% (three-quarters) 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 75% by ferry fares and 25% by state gas tax subsidies. But there is also a cost to build new ferries and terminals as the fleet ages. Like how capital investments in roads and bridges are paid for, funds can come from statewide gas taxes, regional taxes or local usage tolls. In order to pay for needed capital investments in the ferry system 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 who use the ferries?
4. Other

Questionnaire

Q22
Should the replacing of old ferries and improving terminal get the same level of statewide funding as the replacing of old bridges and improving highways?

1. Yes
2. No
3. Don't Know – (Skip TO Q99)

Q23
Why do you feel that way?

_____

Q99
Do you have any additional thoughts on our ferry or transportation system in general you would like to share?

1. No additional feedback – (Skip to Q100)
2. Yes, I have additional feedback

Q99b What additional thoughts on our ferries or transportation system do you have?

_____

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 5,419 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.