

# Washington State Transportation Commission Ferry Customer Survey

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225 North 9<sup>th</sup> Street  
Suite 200  
Boise, ID 83702  
ph; 208.364.0171  
fax: 208.364.0181

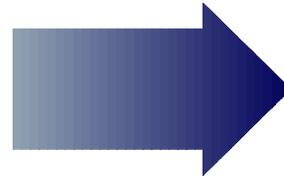
810 3<sup>rd</sup> Ave.  
Suite 258  
Seattle, WA 98104  
ph; 206.624.6465  
fax: 206.625.2690

[www.opinionresearch.com](http://www.opinionresearch.com)  
[www.nwrg.com](http://www.nwrg.com)

# Statement of Purpose and Outcome

## Overall Purpose

- To gather information from a representative sample of ferry customers on their travel attitudes and behaviors
- To identify fare policy, operational, and customer-centric strategies that could be effective in modifying demand for peak hour vehicular travel and/or increasing walk-on passenger traffic while continuing to accommodate demands for existing and future ridership

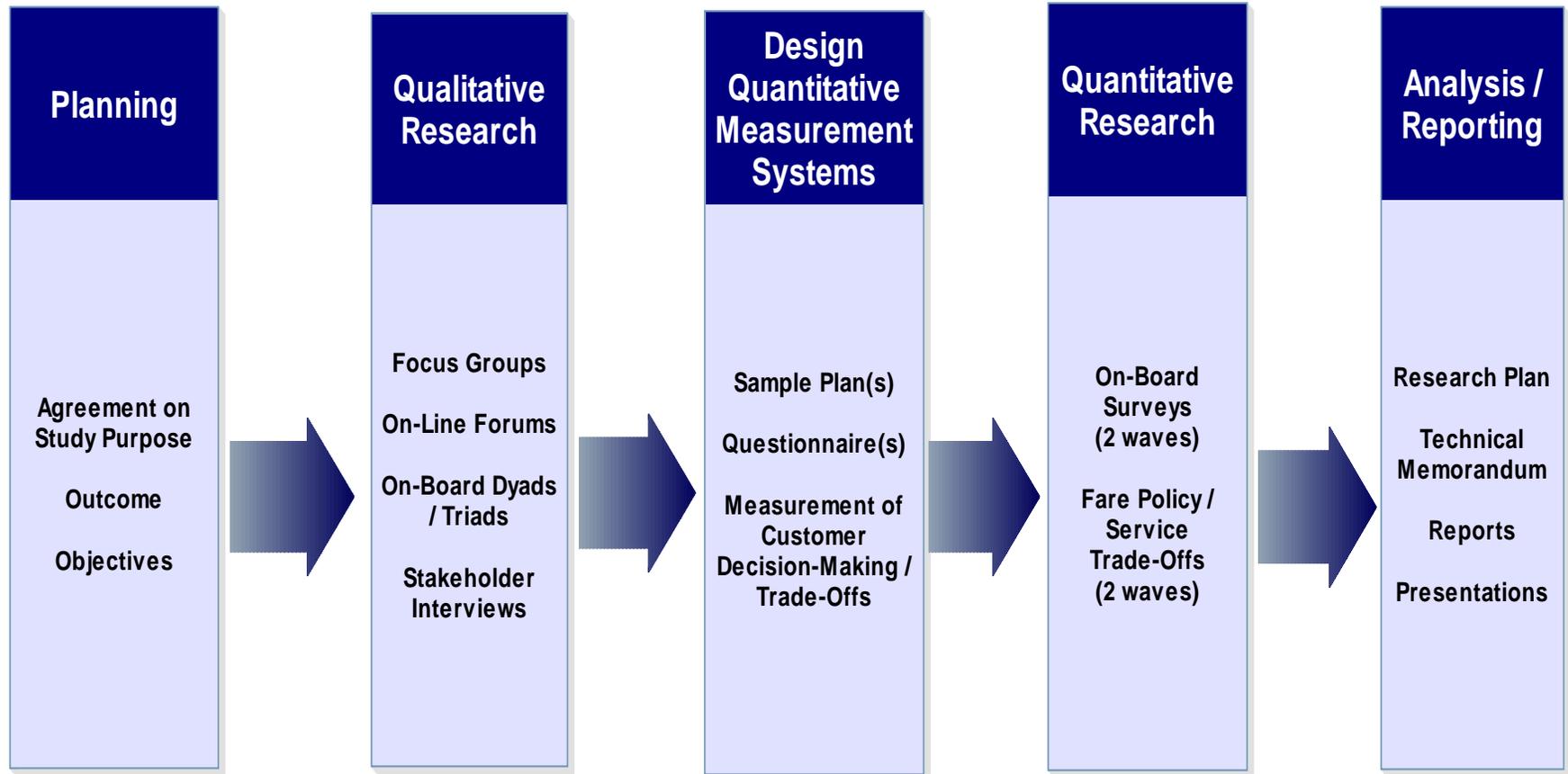


## Key Outcome

A better understanding of customer attitudes and behaviors to

- Estimate the impact of changes in fare policy, operational, and other customer-centric strategies on travel behavior
- Inform decisions that will better utilize existing ferry capacity, increase operational efficiency, reduce the need for capital expansions, and improve cost-efficiency while maintaining ferry revenues

# Overall Study Process



# Qualitative Research Objectives

- Explore current travel behaviors, how customers think / talk about travel, factors that influence travel decisions
- Understand current attitudes toward travel and assess preliminary impacts of pricing and operational strategies on ridership behavior
- Understand key customer characteristics and their potential impacts on attitudes, needs, and expectations for service
- Identify customer requirements / expectations for service and their willingness to trade-off some elements of service in order to encourage behavior change
- Assess best methods for measuring impacts of pricing and operations strategies on ridership behaviors
- Use a mix of methods to reach a broad and representative base of ferry customers
- Provide an opportunity for commission, ferry, and other interested individuals to view the groups

# Focus Groups

- 8 focus groups conducted to date
  - Seattle ferry riders
    - Both frequent and infrequent
    - Some were “reverse commuters”
  - Bainbridge
    - 1 group commuters only -- a mix of walk-on and alternative transportation users (bicycles, motorcycles); 1 freight customer
    - 2 groups with commuters and frequent non-commuter riders heavily weighted to those who drive on at least sometime
  - Vashon Island / Southworth
    - Commuters and frequent non-commuter riders
    - Mix of vehicle and walk-on passengers
  - Bremerton
    - Commuters and frequent non-commuter riders
    - Mix of vehicle and walk-on passengers
  - Edmonds / Kingston
    - Commuters and frequent non-commuter riders
    - Mix of vehicle and walk-on passengers
  - Mukilteo / Clinton and Port Townsend / Keystone
    - Commuters and frequent non-commuter riders
    - Mix of vehicle and walk-on passengers
    - 2 were Port Townsend residents
- Final group scheduled for Saturday 12/15 in Friday Harbor

# Key Findings – Travel

- Ferry passengers have difficult daily commutes
  - Many commuters have already adjusted their work schedules so that they can avoid “peak” travel periods
    - Translates into many catching the earliest boats in the morning and then leaving work early to catch a boat prior to 5:00
    - Work / ferry schedules require nearly all to commute to work during peak morning times
- *I live on the boat...I wake up at 3 to pick up the 4:30 Ferry in Kingston and I walk on. . . one of my workers picks me up on the other end . . .*
  - *I work 4 days a week, I take the 4:15am Ferry there, 4:20pm back. I catch the bus down, then a vanpool picks me up at the ferry terminal and takes me to work. I telecommute one day, sometimes I drive but the paying money factor dictates my driving because it's so expensive.*
  - *It's not just work (when figuring out which vessel to take) it's also what time that I can get home I want time with my kids, fortunately my work is flexible. I have flex hours.*
  - *My life is planned to use the ferry...if I have a 6:30 am flight (works for airline company ) I have to drive because there is no Ferry...or I take the Ferry the night before and stay at the airport hotel which is expensive...*
  - *I take the 9am boat in the morning to avoid rush hour and I try to avoid driving because it's just too expensive...*
  - *I shifted my whole work day just so I can avoid rush hour and catch the boat.*

# Key Findings – Striving to Walk-On

- Many participants were very creative in coming up with strategies to avoid having to drive on the boats
  - Some have scooters while others park a “junker” vehicle on their work side
- Many use public transportation – notably those working in downtown Seattle
- Bicycles and motorcycles are also a popular mode to avoid the high cost of driving

- *My husband drives me to the boat in the morning and I have a car on the other side of the water to get around...*
- *I ride 5 days a week and walk on. I drive my car from house to downtown and pay a monthly parking fee to park, then I walk on the Ferry. When I get to the other side I walk up the hill to work. I have a 14 hour day including my commute.*
- *In good weather I ride by bike to the ferry and walk on. But then when the weather is bad I have to drive. I work in Redmond.*
- *I catch the bus at 5:30am for the 6:00am Ferry. I walk on ferry from there, or hop on vanpool. Then vanpool drives downtown and drops me off at work.*
- *I bought a scooter which I try to use most of the time but in the winter I have to drive on.*

# Key Findings – Plan to Wait

- All participants who drive on plan for at least a one boat wait for their trips
  - Participants indicated that waits are generally longer when the weather was bad, when there were special events, and when tourist / recreation travel was high
  - Those traveling the Edmonds / Kingston and Mukilteo / Clinton routes indicate that Thursdays and Fridays are particularly bad days with three to four boat waits not being uncommon

- *“I would rather drive around than the take the boat because I don’t like sitting in the ferry line and waiting and I don’t like the money that is being charged. I feel like I’m being double charged because I have a monthly pass and I still have to wait.”*
- *“If the tourists go (the same time I do) they take the spots that I need...expect to wait.”*
- *“I plan to catch the boat prior to the one I want to catch then I’ll catch the later boat. In Seattle there is not a good way to turn around so once you are in line then you are stuck.”*
- *“There is no option, you will wait in line...”*
- *“It’s the nature of the beast. It’s in the afternoon from the Seattle side where you have issues getting on and waiting. We have grown know each other (because we wait)...It’s our community for social life...”*
- *“You will wait 1 or 2 boats...and during the summer? Expected to wait at least 2 or 3 boats.”*
- *“When it hits the stop light, you know its’ really bad” (all respondents are able to reference a specific location on the street that if the cars are backed up they know the wait is bad*
- *“Sometimes I’ll wait with husband and go to dinner before getting on board Ferry.”*
- *“Coming home I don’t think about ferry schedule, because I don’t care which boat I catch, I just try to get my work done and get to the ferry. I know if its rush hour I’ll have to sit through and wait for the boat.”*

# Key Findings – Willing to Use Transit

- Participants were generally open to using public transportation to get to and from the boats
  - Lack of connectivity with the ferry schedules and lack of service to their destinations were cited as the primary reason they do not use transit
    - The Vashon group and, to a lesser extent, Kingston were the most critical of the lack of connectivity with public transportation
  - Some suggested that the ferry system should provide shuttle-type service
    - But unwilling to pay extra for service
- *“WSF needs to own parking, why can't the ferry system have Park and Rides?”*
  - *“What about Park and Ride lots? Like the bus, Park and Ride should be free, make it convenient to riders, if you want people to not drive then encourage ridership, because existing areas to park are way too full and there is no where to park.”*
  - *“Community Transit bus is pulling away as a people are getting off ferry...” (In reference to lack of connectivity between systems.*
  - *“A train, like the Sounder. Even from downtown Seattle to Mukilteo.”*
  - *“I just don't understand why the Ferry system doesn't run buses.”*
  - *“There needs to be better coordination with the bus schedules.”*
  - *“Terminal connections, mass transit, park and ride. They (all systems) need to listen, because it's a statewide issue.”*
  - *“There needs to be an interface between all the transit systems. We could get them together regionally. Look at the schedules and talk about it.”*
  - *“Ferry system needs to get some sort of shuttle, like a vanpool that runs to and from a specific park and ride to the ferry terminals.”*
  - *“The WSF need to work with the local transit system.”*
  - *“There are places that are hard to get to in the city. The ferries need to talk to (KC) Metro and communicate.”*

# Key Findings – Need to Plan

- The ability to plan and predictability are important components of customer satisfaction and their willingness to put up with other inconveniences
    - Participants in each group mentioned getting e-mail alerts which were considered helpful if not always timely.
    - Feelings were mixed about the effectiveness of web cams in providing information on actual wait times; some reported called customer service to verify the e-mail alerts or what they saw on the camera and getting conflicting information
  - Participants were generally interested in being able to get more up-to-date information about wait times and emergencies through traditional traffic media such as the radio or something specific to the ferries.
- *“Email alerts are sometimes late which don’t help...they might say if the boats are going to be switched or late, but not necessarily which time.”*
  - *“Sometimes the attendants don’t even know what is going on which isn’t helpful.”*
  - *“The emails are fine but they need to be accurate and timely - there used to be a reader board which gave wait times to cities and terminals but its no longer there.”*
  - *“I rely on the Ferry cams”*
  - *“You listen to the news, people call in sometimes if there are issues so you have a heads up”*
  - *“Back up scheduling & knowledge - so if I know I need to be there at 10am , and I know I need this much buffer to catch the ferry”*
  - *“I call the general WSF number that is automated”*
  - *“The Ferry needs to be on the Ferry site, not just the WSDOT site. And it needs to look further or the road...I don’t care how many people are on the dock, I care about how many people are waiting in line.”*

# Key Findings – Willingness to Modify Behaviors

- Commuters did not feel that they were the problem with system demand and utilization
  - Frequently calling themselves the “backbone of the system,” they felt that the focus should be on getting non-commuters and recreational users to modify their behaviors
- Participants were generally of the mind that the recreational user should bear the brunt of any sort of disincentives to using the ferry during peak times

- *“We are their bread and butter.”*
- *“The ferry system makes money off the run (Bainbridge route), that run helps subsidize the ferry system.”*
- *“We, the commuters, are the backbone of the system.”*
- *“I’m already paying enough with my monthly pass, why should I have to wait because the RV on a Friday with 4 kids wants to go on vacation?”*
- *“If you pay with a monthly pass you should be guaranteed to get through. When WSF knows pleasure travelers are going to negatively impact they should put a second boat there to help.”*
- *“For things like events, or at 5:00 pm at night for an afternoon game mariners you have to wait to go home from work.”*
- *“If you are paying with a monthly pass those rows should always load first. Then if you pay with cash take the next few rows. It disincentives those that travel less frequently.”*
- *“I don’t think tourists would know if they were being penalized for paying more”*

# Key Findings – Willingness to Pay

- Commuters were very interested in options that might let them “speed” through toll booths and even move to the front the line
  - Feelings, however, were mixed as to whether they would be willing to pay for these options again expressing the feeling that as the “backbone of the system,” they deserved these “perks”
  - They also felt that their prepayment of fares – by that providing the system with interest-free income – would more than pay for their ability to gain these benefits
  - Few recognized that the fare prepayments also resulted in a significant discount

- *“For people who use frequent passes, people who support the ferry system because they are always paying, they should have some sort of priority, a lane for those commuters to sail on through”*
- *“For peak hour travel, and talking about ferry service charging more - you can create a monthly pass only lane, but if you don’t (have a monthly pass) then you should pay more or take the lesser route. Don’t make me pay more, don’t charge the regular commuters more.”*
- *“There needs to be reservations for people that can get on boats so you don’t have to wait in line.”*
- *“If you pay ahead of time and give them money and invest in them, why shouldn’t we have a priority?”*
- *“They should have one line that should be labeled ticket holders only. Don’t have to wait for Aunt Margaret dink through her change. It’s a new experience every time, so it makes the prepaid customers go crazy.”*
- *“To some extent it’s the frequent users who work and the ones who buy the tickets however it creates an incentive for others to buy tickets, the ferries are getting the value upfront.”*
- *“Tourism does help support the ferry system, but would I pay more to get up front? Yep! Time is money so I would pay for a “reservation” whatever you want to call it, we should get perks.”*
- *“Like on 3rd Avenue in Seattle (with the bus only lanes) they should accommodate for commuters.”*

# Key Findings – Willingness to Pay

- Participants were generally able to understand and respond to different strategies for managing demand for vehicular traffic on the ferries, frequently suggesting some of the strategies being considered
  - They were clearly willing to consider trade-offs
  - Although not clear that they would be willing to pay or how much more they would pay

- *“No we pay enough.” (In response to “Would you be willing to pay more for a reserved spot.”)*
- *“It should be significantly more, especially during tourist season, there needs to be some kind of compassion for commuters.”*
- *“I’m not sure that I would pay more.”*
- *“If you are spending more money then buy another boat.”*
- *“I would be willing to pay 25% more (to priority load) on top of my monthly pass.”*
- *“Getting in front of line is worth it for me...” (Uncertain as to what cost it should be)*
- *“I would expect to pay 150% more.”*
- *“I would pay 0% more - I bought (advance) ticket and it’s good any day of the week, so I want to be able to use ticket whenever” (at that price).*
- *“When you give the ferry system use of your money , prepay, why should I have to pay more?”*
- *“It should be reasonable”*
- *“10-20% more.”*

# Key Findings – Positive Toward System

- Participants were generally supportive of / positive toward the ferry system
  - While concerns were expressed, most suggestions / recommendations were constructive
  - Very few highly critical statements were heard

- *“Walk on passengers actually get a better rate...they are also pretty much guaranteed a spot.”*
- *“They are always addressing safety – I know they are working to address safety of the bicyclists “*
- *“Alternative modes of transportation are encouraged – if you are a vanpool, bicycle, motorcycle you get special treatment”*
- *“I can live my life the way I want away from the city (Seattle). When I want to go to the city I hop on the Ferry and go for the day. “*
- *“I do think the ferries do a good job on being on time. Think of all the runs they have. They do occasionally run late, but you can always see why (due to various circumstances). From that perspective they do a good job.”*
- *“Think about working in the maritime environment. It’s 365 days a year, 7 days a week, 24 hours a day and they are amazing. Look at Amtrak (in comparison:”*
- *“Maritime vehicles need more funding...no one rides the 520 highway for fun”*

# Next Steps

- Finish focus groups
  - Report on focus groups to be completed by first week in January
- Launch on-line forums – January
  - Additional ferry customers who were unable to attend groups
  - Mayors / county commissioners / school districts in ferry affected communities
  - Businesses / resorts in ferry affective communities
- Develop sample plan / schedule for on-board surveys
  - Complete by first week in January
- Develop on-board survey questionnaire
  - Complete draft by first week in January
  - Use dyads / triads to test / discuss first draft of questionnaire
  - Refine and pretest
- Conduct first wave of on-board surveys late February / early March