



Washington State Transportation Commission

2008 Washington State Ferries Customer Survey

**Joint Transportation Committee – Ferry Policy Group
September 10, 2008**



Opinion Research Northwest

Objectives

Purpose

To gather information on travel behavior and attitudes from a representative sample of ferry customers

To identify fare policy, operational, and customer-centric strategies that could be effective in modifying peak hour vehicular travel and/or increasing walk-on passenger travel while continuing to accommodate demand for existing and future ridership

Key Outcomes

A better understanding of customers attitudes and behaviors to:

Estimate the impact changes in fare policy, operational, or customer-centric strategies could have 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 and continuing to meet customer needs

Overall Approach

- ▶ Multi-phase, comprehensive
 - ▶ Three primary research phases
 - ▶ Culminating in a final comprehensive report
 - ▶ Anticipated release date: Early November 2008



On-Board Surveys

- ▶ Two waves of on-board surveys
 - ▶ March 2008
 - ▶ July / August 2008
- ▶ Random sample of trips on all routes
 - ▶ Surveys conducted on 345 one-way trips
- ▶ More than 63,000 passengers approached
- ▶ More than 13,000 surveys completed
 - ▶ Only 559 riders surveyed completed both the winter and summer surveys

Route	Total	Winter	Summer
SEA/BAI	4,600	2,060	2,540
SEA/BRE	1,567	758	809
EDM/KIN	2,413	996	1,417
MUK/CLI	1,789	646	1,143
FAU/VAS	503	251	252
FAU/SOU	547	268	279
PTD/TAH	147	93	54
PTT/KEY	432	128	304
ANA/SAN	923	271	652
ANA/SID	209	0*	209
Total	13,130	5,471	7,659

**No Anacortes / Sidney ferry during winter*



Key Findings



Customer Characteristics

Customer Demographics

- ▶ WSF customers nearly equally divided between men (48%) and women (52%)
 - ▶ In winter an equal number of men (50%) and women (50%) ride
 - ▶ In summer somewhat more women (53%) than men (47%)
- ▶ WSF customers are somewhat older than the general population in Washington
 - ▶ Over half (51%) of all WSF riders are between the ages of 45 and 64; average age is 51
 - ▶ Summer riders are somewhat younger than winter riders – 21 percent are under the age of 35

Customer Demographics (cont'd)

- ▶ Three out of four (76%) WSF riders are employed; 61 percent are employed full-time
 - ▶ No significant differences between winter and summer riders
- ▶ A significant number (16%) are retired
- ▶ WSF riders are relatively affluent
 - ▶ Median household income is \$80,872 compared to
 - ▶ \$55,591 for Washingtonians in general
 - ▶ \$58,159 for ferry communities
 - ▶ No significant differences between winter and summer riders



Key Findings



Travel Behavior

Ridership – # of Trips / Sampled Week

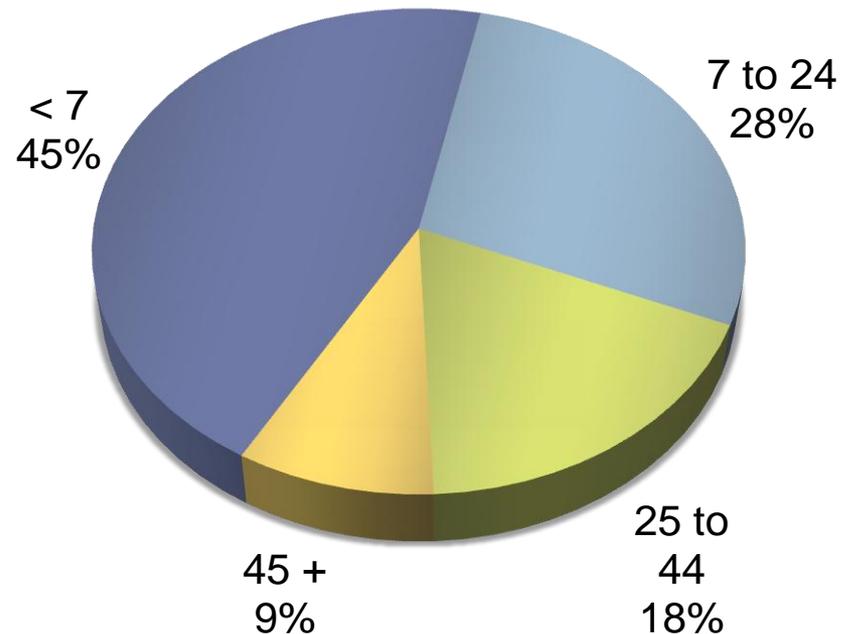
- ▶ Ridership on WSF **increases 38 percent** from winter to summer travel periods
- ▶ Increases are greatest on
 - ▶ Anacortes / San Juans
 - ▶ Fauntleroy / Vashon
- ▶ Share of ridership does not vary significantly

	Winter		Summer		%
	#	%	#	%	Δ
TOTAL	389,972		536,319		38%
SEA/BAI	113,582	29%	149,428	28%	32%
SEA/BRE	46,043	12%	63,244	12%	37%
EDM/KIN	78,663	20%	98,335	18%	25%
MUK/CLI	73,128	19%	91,838	17%	26%
FAU/VAS	14,735	4%	25,634	5%	74%
FAU/SOU	21,979	6%	23,805	4%	8%
PTD/TAH	6,143	2%	5,094	1%	-17%
KEY/PTT	9,664	2%	15,383	3%	59%
ANA/SAN	26,036	7%	54,294	10%	109%
ANA/SID			9,265	2%	

Frequency of Riding

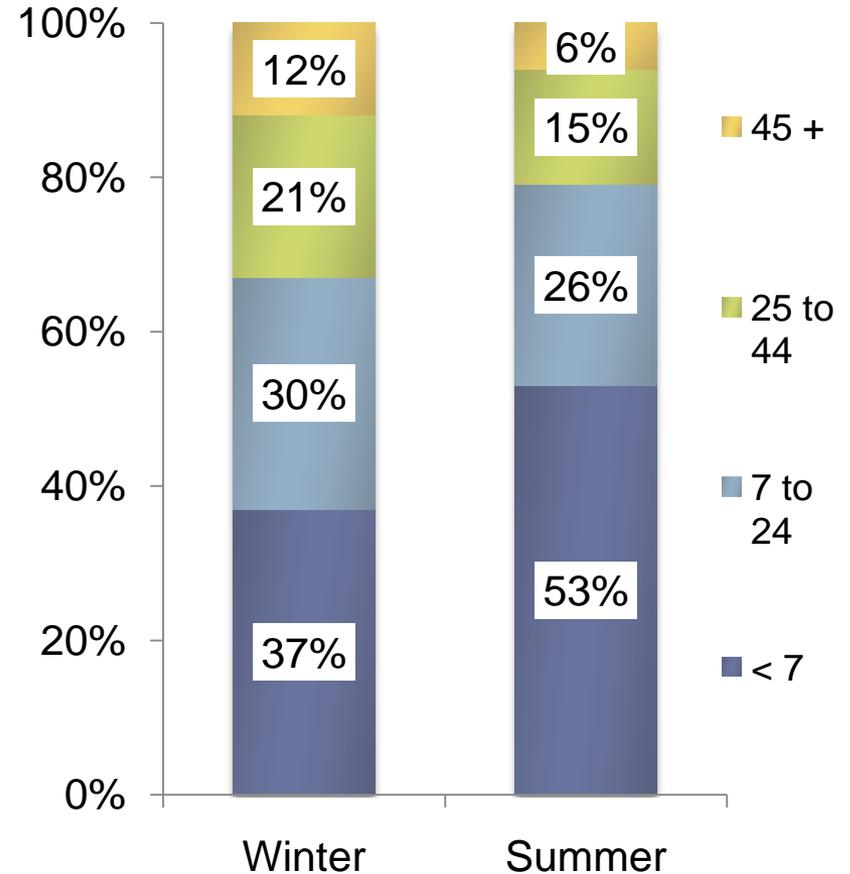
- ▶ The **largest segment** (45%) of riders take **fewer than 7** one-way trips per month
- ▶ Fewer than one out of ten (9%) WSF riders are “daily” riders – taking 45 plus one-way rides / month
- ▶ On **average**, WSF riders take **16.5 one-way trips monthly**

of One-Way Trips / Month



Frequency of Riding (cont'd)

- ▶ **Winter riders are more frequent riders**
 - ▶ 12 percent are daily riders
 - ▶ Average 19.7 total trips / month
- ▶ **Summer riders average 13.9 total trips / month**
 - ▶ More than half (53%) take fewer than 7 trips monthly



Frequency of Riding (cont'd)

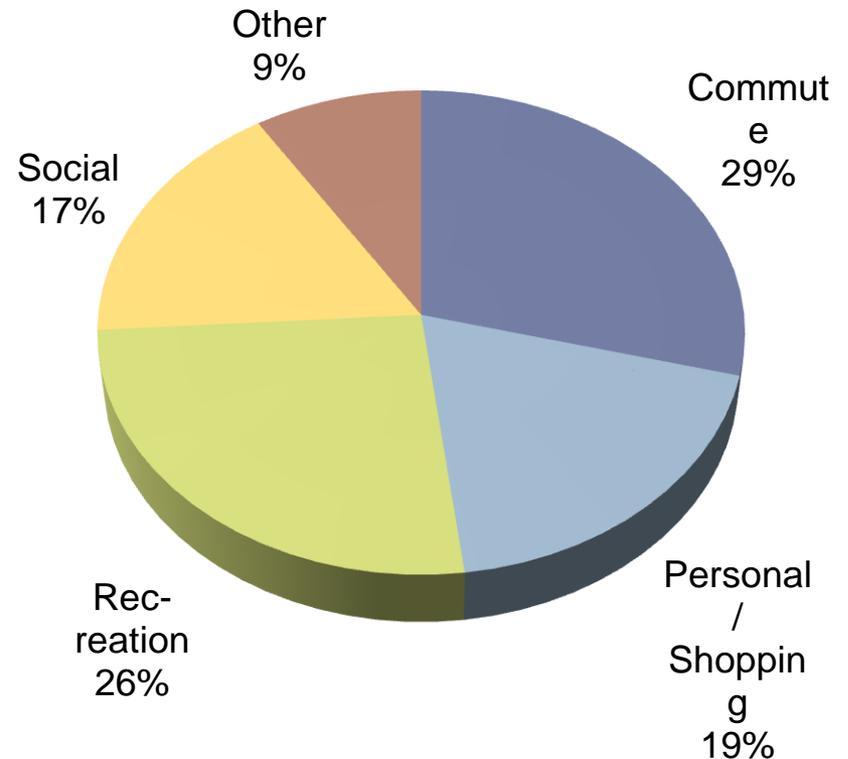
- ▶ Fauntleroy / Vashon riders are WSF's most frequent riders
 - ▶ This route experiences the greatest increase in occasional riders during the

	ALL	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/C LI	FAU/ VAS	FAU/ SOU	PTD/T AH	PTT/K EY	ANA/ SAN
Number of One-Way Rides / Month – Winter										
< 7	37%	33%	34%	43%	28%	12%	30%	26%	63%	77%
7 – 24	30%	26%	21%	31%	42%	28%	37%	28%	21%	19%
25 – 44	21%	25%	31%	18%	17%	30%	24%	31%	9%	3%
45 +	12%	16%	14%	7%	13%	29%	9%	16%	6%	<1%
Mean	19.7	22.8	23.9	15.9	19.7	31.4	20.3	24.5	11.3	5.3
Number of One-Way Rides / Month – Summer										
< 7	53%	43%	43%	61%	50%	35%	38%	42%	83%	88%
7 – 24	26%	30%	25%	23%	32%	36%	27%	24%	14%	10%
25 – 44	15%	18%	23%	13%	13%	18%	27%	28%	1%	2%
45 +	6%	9%	9%	4%	6%	10%	8%	6%	2%	<1%
Mean	13.9	16.8	19.1	11.1	13.1	17.9	19.2	15.6	4.7	3.4

Trip Purpose

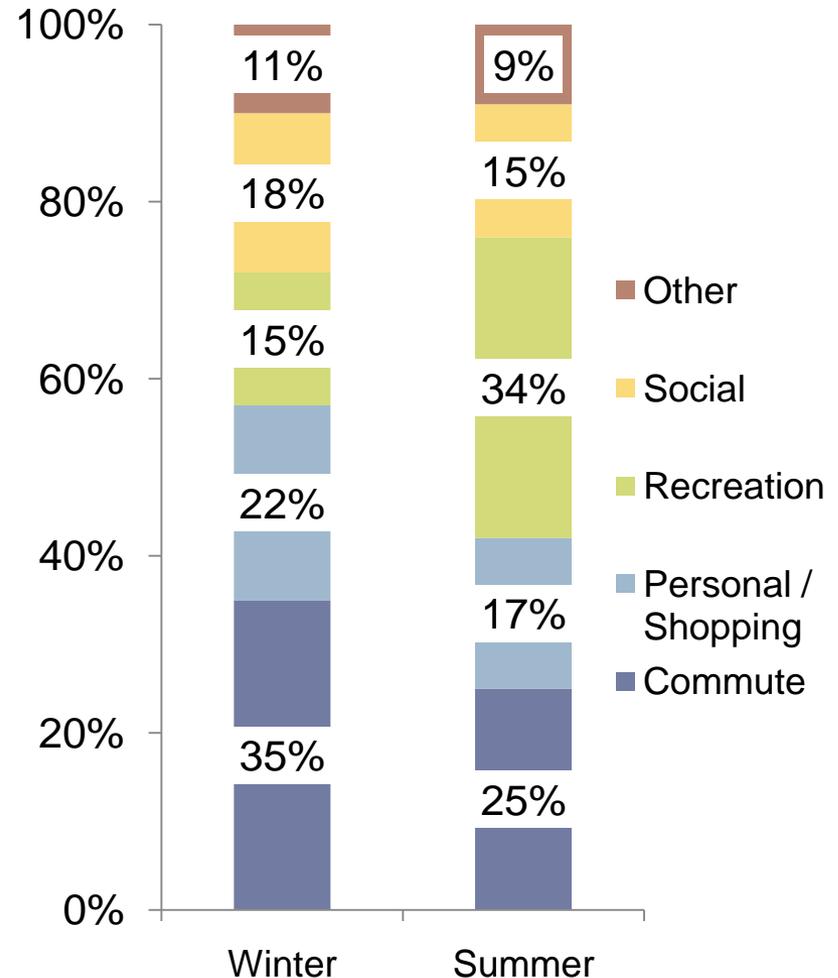
- ▶ WSF meets the mobility needs of riders traveling for many different types of trips
- ▶ **Commuter trips represent just 29 percent of all primary trips**

% of Primary Trips



Trip Purpose (cont'd)

- ▶ Much of the increased ridership in the summer is from those traveling for **recreational purposes**
 - ▶ One-third (34%) of summer riders are recreational
- ▶ While the percentage of commute trips in the summer declines significantly, the actual **number of commute trips is almost the same**
 - ▶ Winter = 130,951 trips
 - ▶ Summer = 131,481 trips



Recreation Travel by Route

- ▶ There is a **38 percent increase in weekly ridership during the summer**
 - ▶ There is a **220 percent increase in the number of recreation trips**
- ▶ The Seattle / Bainbridge and Seattle / Bremerton routes carry a lower share of the recreational trips during the summer than in the winter
- ▶ Anacortes and, to a lesser extent, Mukilteo / Clinton carry a greater share of the recreational trips during the summer

	Winter		Summer	
Total Trips	389,972		536,319	
	Recreation Trips			
	#	%	#	%
All Routes	55,408		177,552	
SEA/BAI	18,018	33%	44,319	25%
SEA/BRE	5,395	10%	13,156	7%
EDM/KIN	9,976	18%	31,070	17%
MUK/CLI	7,113	13%	26,539	15%
FAU/VAS	1,237	2%	6,769	4%
FAU/SOU	1,740	3%	3,938	2%
PTD/TAH	1,032	2%	1,314	1%
KEY/PTT	2,094	4%	8,612	5%
ANA/SAN	8,804	16%	34,123	19%
ANA/SID			7,711	4%
<i>* No Anacortes / Sidney ferry during winter months</i>				

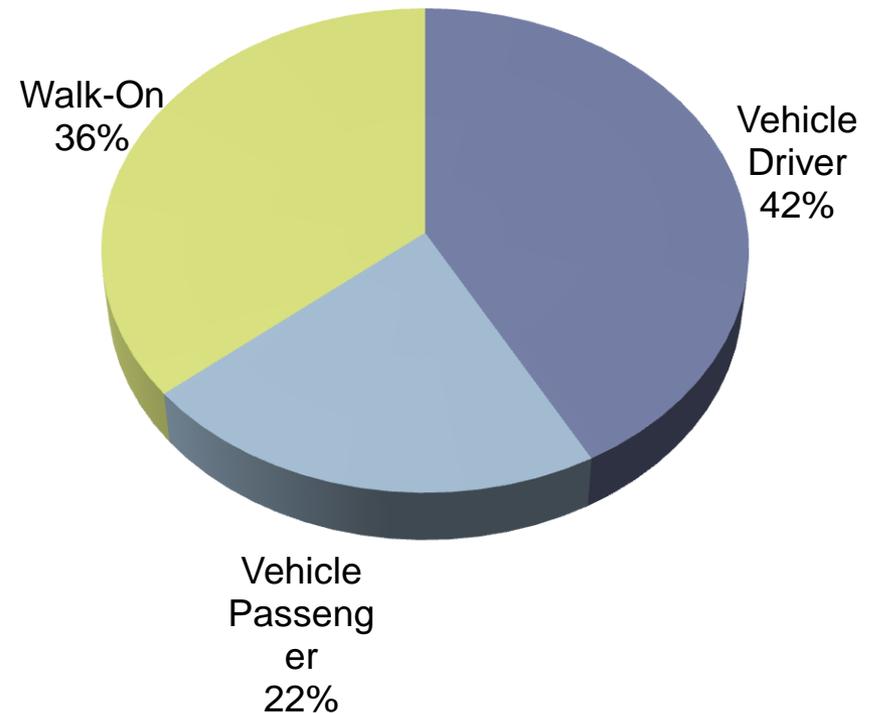
Recreation Travel

- ▶ Only **12 percent** of recreational riders are riding WSF for their **first time recreation / leisure trip**
 - ▶ 31 percent of recreational travelers on Anacortes / Sidney and 18 percent on Anacortes / San Juans are first time riders
- ▶ Forty-three percent (43%) of recreational riders are “**day-trippers**”
 - ▶ This is most prevalent on the Seattle / Bainbridge, Seattle / Bremerton, and Fauntleroy / Vashon / Southworth routes
 - ▶ Only 12 percent of those on the San Juans are “day-trippers”
- ▶ Eighty-seven percent (87%) **travel round trip** on the ferries
- ▶ Primary reasons for using the ferry
 - ▶ **Fastest** way (37%)
 - ▶ **No other reasonable alternative** (32%)

Boarding Mode – Sampled Trip

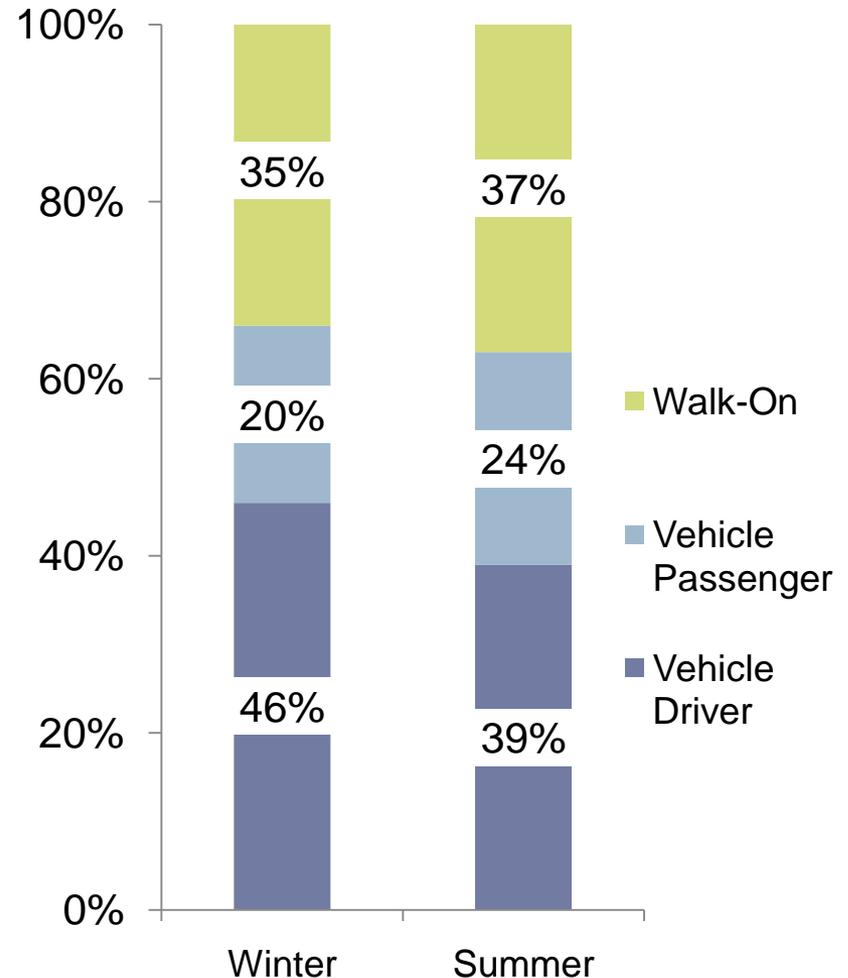
- ▶ The **majority** (64%) of all WSF riders **drive onto the ferry** – as a driver or as a passenger in a vehicle

% Mode Used for Primary Trip



Boarding Mode (cont'd)

- ▶ Approximately the **same percentage** of WSF riders **walk onto** the ferries in the **summer** as in the **winter**
 - ▶ While a small segment, more walk-on passengers are bicycle riders in the summer than in the winter
 - ▶ Summer = 5.3% bicycle
 - ▶ Winter = 3.5% bicycle
- ▶ The mix of vehicle drivers versus vehicle passengers changes between winter and summer due to **higher vehicle occupancy**
 - ▶ Winter = 1.7 pp / vehicle
 - ▶ Summer = 1.9 pp / vehicle



Boarding Mode by Route

- ▶ **Highest percentage** of walk-on passengers: Bainbridge & Bremerton
- ▶ Greatest **increase** in **vehicle** traffic in **summer**: Fauntleroy / Vashon
- ▶ Greatest **increase** in **walk-on** passengers in **summer**: Point Defiance / Tablequah and Anacortes / San Juans

	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/C LI	FAU/ VAS	FAU/ SOU	PTD/T AH	PTT/K EY	ANA/ SAN	ANA/ SID
	% Walk On									
All	48%	63%	26%	20%	26%	25%	20%	22%	31%	43%
Winter	47%	64%	25%	20%	29%	27%	14%	19%	21%	*
Summer	48%	62%	27%	20%	24%	23%	27%	25%	36%	43%
	% Drive On (As Driver or Passenger in Vehicle)									
All	52%	37%	74%	80%	74%	75%	80%	78%	69%	57%
Winter	53%	35%	75%	80%	71%	73%	85%	82%	79%	*
Summer	51%	38%	73%	80%	76%	77%	73%	75%	64%	57%

* No Anacortes / Sidney ferry during winter months.

Boarding Mode by Trip Purpose

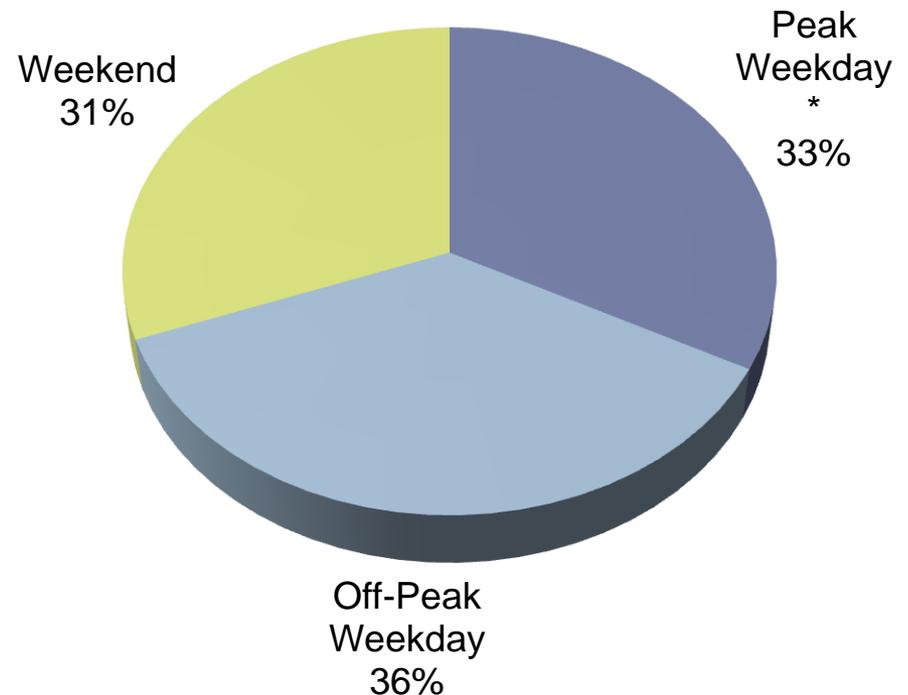
- ▶ Significantly **more commuters walk onto** the ferries in the **summer** than in the **winter**
 - ▶ Suggesting that they are able to vary their travel modes
 - ▶ Weather also likely a factor

	Commute	Personal	Recreation	Social	Other
	% Walk On				
All	55%	26%	31%	32%	18%
Winter	52%	24%	27%	30%	20%
Summer	59%	27%	33%	33%	16%
	% Drive On (As Driver or Passenger in Vehicle)				
All	45%	75%	69%	68%	82%
Winter	48%	76%	73%	70%	80%
Summer	41%	73%	67%	67%	84%

Time of Day / Week Traveled

- ▶ Travel on WSF is almost **evenly divided** across the three **primary travel periods**

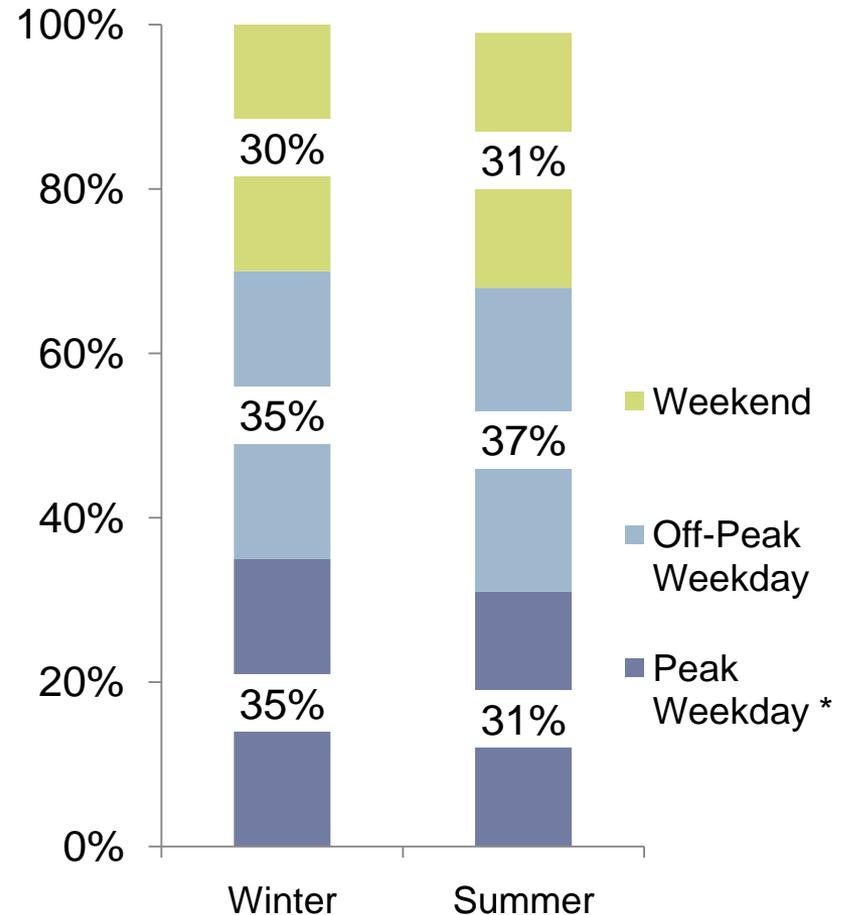
% Time / Day Traveled for Primary Trip



* Peak weekday: Eastbound mornings between 5:30 and 9:00 a.m.; westbound afternoons between 3:00 and 7:00 p.m.

Time of Day / Week Traveled (cont'd)

- ▶ As would be expected, a **greater** proportion of trips during the **summer** are taken on **off-peak weekdays** and on **weekends**



* Peak weekday: Eastbound mornings between 5:30 and 9:00 a.m.; westbound afternoons between 3:00 and 7:00 p.m.

Time of Day / Week Traveled (cont'd)

- ▶ Bremerton and, to a lesser extent, Bainbridge carry the greatest percentage of peak weekday riders

	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/ CLI	FAU/ VAS	FAU/ SOU	PTD/ TAH	PTT/ KEY	ANA/S AN
	% Peak Weekday*								
All Riders	34%	42%	20%	25%	28%	30%	27%	31%	63%
	% Off-Peak Weekday								
All Riders	38%	30%	43%	42%	44%	49%	17%	35%	5%
	% Weekend								
All Riders	27%	27%	37%	33%	28%	21%	55%	34%	32%

* Peak weekday: Eastbound mornings between 5:30 and 9:00 a.m.; westbound afternoons between 3:00 and 7:00 p.m.

Time of Day / Week Traveled (cont'd)

- ▶ Greatest increase in off-peak weekday travel: San Juans, Port Townsend / Keystone, and Fautleroy / Vashon
- ▶ Greatest increase in weekend travel: Fautleroy / Vashon and Seattle / Bremerton

	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/ CLI	FAU/ VAS	FAU/ SOU	PTD/ TAH	PTT/ KEY	ANA/S AN
	% Peak Weekday*								
Winter	38%	46%	22%	27%	42%	19%	28%	39%	69%
Summer	32%	39%	19%	24%	21%	40%	26%	25%	61%
	% Off-Peak Weekday								
Winter	37%	30%	40%	39%	38%	60%	19%	29%	<1%
Summer	39%	31%	46%	44%	48%	40%	15%	39%	7%
	% Weekend								
Winter	25%	24%	39%	33%	21%	21%	52%	32%	30%
Summer	29%	30%	35%	33%	31%	21%	59%	36%	32%

* Peak weekday: Eastbound mornings between 5:30 and 9:00 a.m.; westbound afternoons between 3:00 and 7:00 p.m.



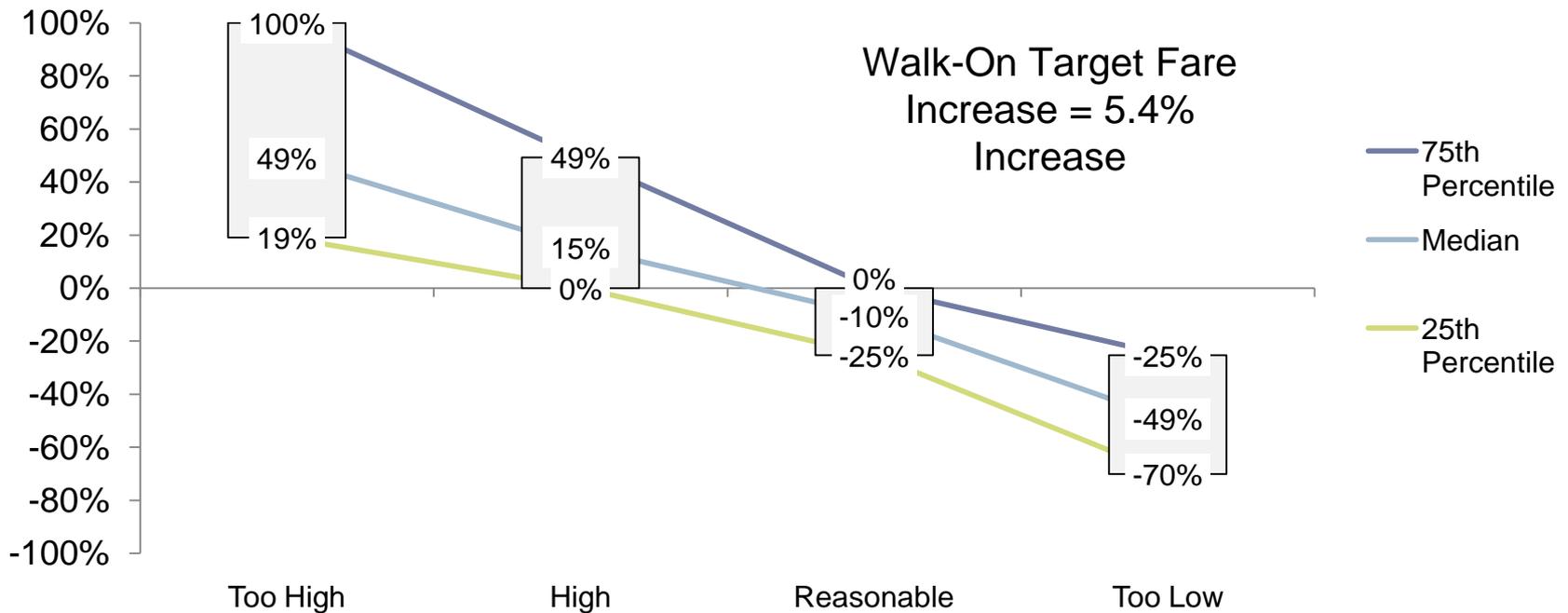
Key Findings



Fare Sensitivity

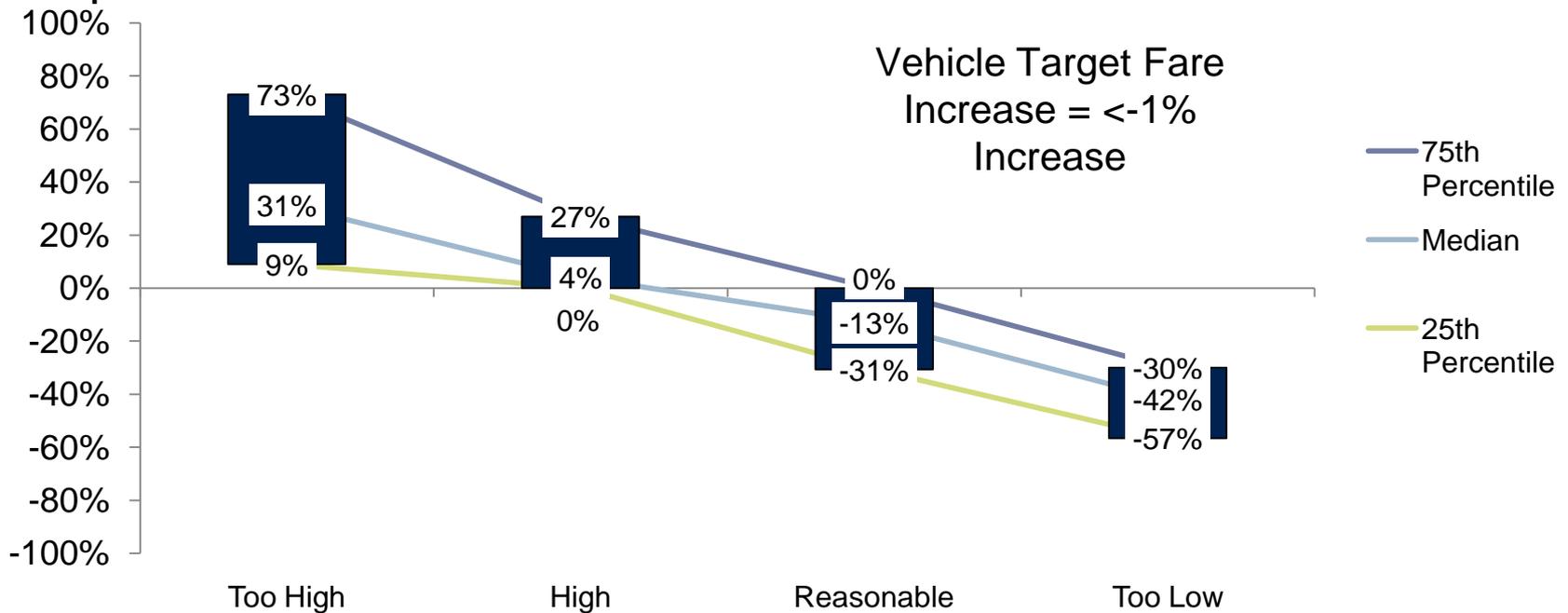
Fare Sensitivity – Walk-On Fares

- ▶ Half (50%) of all riders feel that a **reasonable walk-on fare** would be between **25 percent less than** the current, non-discounted fare and the **current**, posted, non-discounted fare
- ▶ Walk-on fares **could increase as much as 5.4 percent** and still be considered “not expensive”



Fare Sensitivity – Vehicle Fares

- ▶ Half (50%) of all riders feel that a **reasonable vehicle fare** would be between **31 percent less** than the current, non-discounted fare and the current, posted, non-discounted fare
- ▶ Vehicle fares **could not increase** and still be considered “not expensive”



Walk-On Fare Sensitivity by Boarding Mode

- ▶ Clearly winter riders are more sensitive to a fare increase than summer riders
- ▶ Winter walk-on riders are the most price sensitive
- ▶ There are no significant differences in price sensitivity among summer riders

	All Riders	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is "Not Expensive"		
All Riders	5.4%	-6.2%	16.5%
Vehicle Drivers	3.9	-5.6%	15.7%
Vehicle Passengers	5.5%	-5.1%	15.6%
Walk-On Passengers	6.7%	-7.4%	17.4%

Vehicle Fare Sensitivity by Boarding Mode

- ▶ Reflecting, the summer surcharge, **summer riders are more sensitive to a fare increase**
- ▶ Vehicle drivers and walk-on passengers are more sensitive to increases in vehicle fares than vehicle passengers
 - ▶ In winter vehicle drivers are the most price sensitive
 - ▶ In summer walk-on passengers are the most sensitive to increases vehicle fares

	All Riders	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is "Not Expensive"		
All Riders	-0.7%	1.5%	-2.9%
Vehicle Drivers	-1.2%	0.2%	-2.5%
Vehicle Passengers	0.8%	3.0%	-0.8%
Walk-On Passengers	-1.2%	2.6%	-4.8%

Walk-on Fare Sensitivity by Travel Time

- ▶ **Peak weekday riders** are the **most** sensitive to a fare increase
 - ▶ Their target fare has the lowest overall increase in fares over the current, non-discounted walk on fare
 - ▶ There is least difference in their target fare increase between winter and summer periods

	All Riders	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is “Not Expensive”		
All Riders	5.4%	-6.2%	16.5%
Peak Weekday	2.5%	-8.0%	13.3%
Off-Peak Week day	5.6%	-7.0%	16.6%
Weekend	8.7%	-3.1%	20.0%

Vehicle Fare Sensitivity by Travel Time

- ▶ Looking at all riders, **off-peak weekday riders are the most sensitive** to increases in vehicle fares
- ▶ However, **peak weekday summer riders are the most sensitive** to increases in vehicle fares

	All Riders	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is "Not Expensive"		
All Riders	-0.7%	1.5%	-2.9%
Peak Weekday	-1.5%	1.5%	-4.6%
Off-Peak Week day	-2.3%	-0.8%	-3.5%
Weekend	2.0%	4.3%	-0.1%

Walk-on Fare Sensitivity by Route

- ▶ Riders on the **high recreational travel routes** are the **least sensitive** to an overall walk-on fare increase
- ▶ On the other major routes:
 - ▶ Fautleroy / Vashon riders are the least sensitive to an overall walk-on fare increase
 - ▶ Point Defiance / Tahlequah riders are the most sensitive to a walk-on fare increase
 - ▶ Edmonds / Kingston riders are the least sensitive to a increase in walk-on fares during the summer

	All	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is "Not Expensive"		
All Riders	5.4%	-6.2%	16.5%
SEA/BAI	4.3%	-7.2%	14.4%
SEA/BRE	4.1%	-7.8%	14.8%
EDM/KIN	3.7%	-8.8%	17.1%
FAU/VAS	9.2%	-7.9%	21.5%
FAU/SOU	7.3%	-1.7%	15.7%
PTD/TAH	-2.3%	-9.9%	8.5%
MUK/CLI	2.6%	-5.7%	14.6%
PTT/KEY	21.4%	16.8%	26.1%
ANA/SAN	13.3%	-1.1%	23.2%
ANA/SID	28.4%	*	28.4%

Vehicle Fare Sensitivity by Route

- ▶ Riders on the **high recreational travel routes are the least sensitive to an overall vehicle fare increase**
- ▶ On the other major routes:
 - ▶ Fautleroy / Southworth and, to a lesser extent, Point Defiance / Tahlequah are the **most sensitive** to an overall vehicle fare increase
 - ▶ But look at winter riders on Fautleroy / Vashon and Fautleroy / Southworth
 - ▶ Seattle / Bainbridge and, to a lesser extent, Edmonds / Kingston riders are the least sensitive to a increase in vehicle fares

	All	Winter	Summer
	% Fare Increase / Decrease Over Current, Non-Discounted Fare that is "Not Expensive"		
All Riders	< -1%	1.5%	-2.9%
SEA/BAI	-1.5%	2.9%	-5.5%
SEA/BRE	-4.0%	1.1%	-9.0%
EDM/KIN	-1.6%	1.6%	-4.6%
FAU/VAS	-4.6%	-17.6%	4.3%
FAU/SOU	-10.7%	-17.5%	-4.8%
PTD/TAH	-7.3%	-9.8%	-4.5%
MUK/CLI	0.0%	3.6%	-4.1%
PTT/KEY	11.1%	4.8%	16.7%
ANA/SAN	13.0%	15.5	11.2%
ANA/SID	16.6%		16.6%



Key Findings



Reservations

Attitudes toward Reservation System

- ▶ Riders **agree** that a reservation system should consist of the following elements:
 - ▶ If passenger does not arrive on time, they would forfeit their reservation space and fee
 - ▶ Frequent users should be able to reserve a full week's travel at a time
 - ▶ Some space would be available a month in advance and some would remain available for same day travel
- ▶ They **do not feel** that . . .
 - ▶ There should be a premium fare charged – notably summer riders
 - ▶ The amount of space should be limited – notably winter riders
 - ▶ It should be limited to routes with high recreation travel

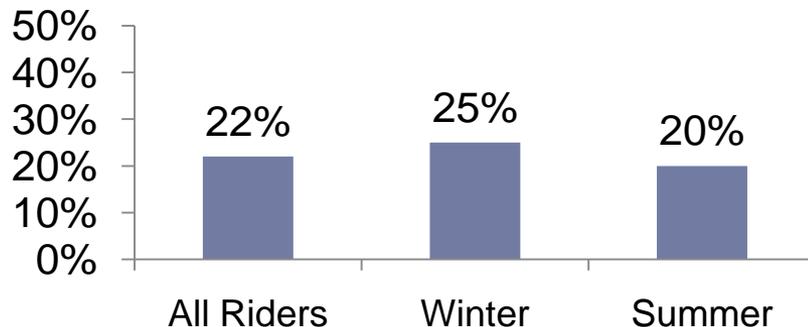
		All	Win-ter	Sum-mer
Reservation fee / space forfeited if miss ferry	% Agree	66%	65%	67%
	Mean	3.79	3.80	3.79
Reservation customers would pay premium	% Agree	45%	49%	44%
	Mean	3.09	3.24	2.96
Limited space available for reservations	% Agree	40%	36%	43%
	Mean	3.08	2.79	3.32
Limited to routes with high recreation travel	% Agree	40%	40%	40%
	Mean	3.04	3.05	3.03
Frequent users could reserve full week at a time*	% Agree			57%
	Mean			3.45
Can reserve some month in advance/ some day of*	% Agree			47%
	Mean			3.20

* Asked summer only, based on further refinement of proposed program

Willingness to Pay Premium for Reservation

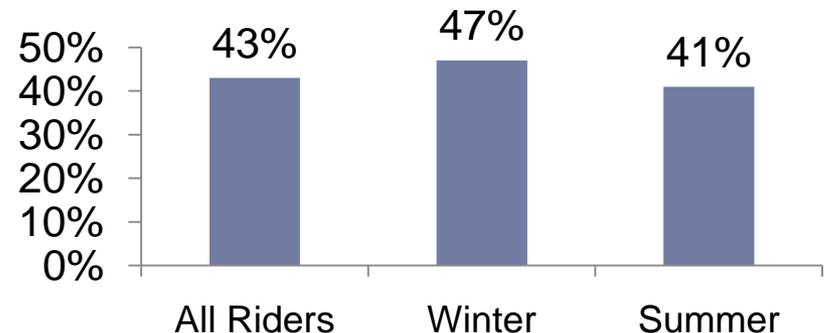
- ▶ More than one out of five (22%) riders are **unwilling to pay any premium** over the current non-discounted vehicle fare for a guaranteed space at a specific boarding time
- ▶ On the other hand, more than two out of five (43%) riders are willing to pay a premium

% Unwilling* to Pay Any Premium



* % of respondents who indicated that they were “very unwilling” to pay any of the five premium amounts presented

% Willing to Pay A Premium**

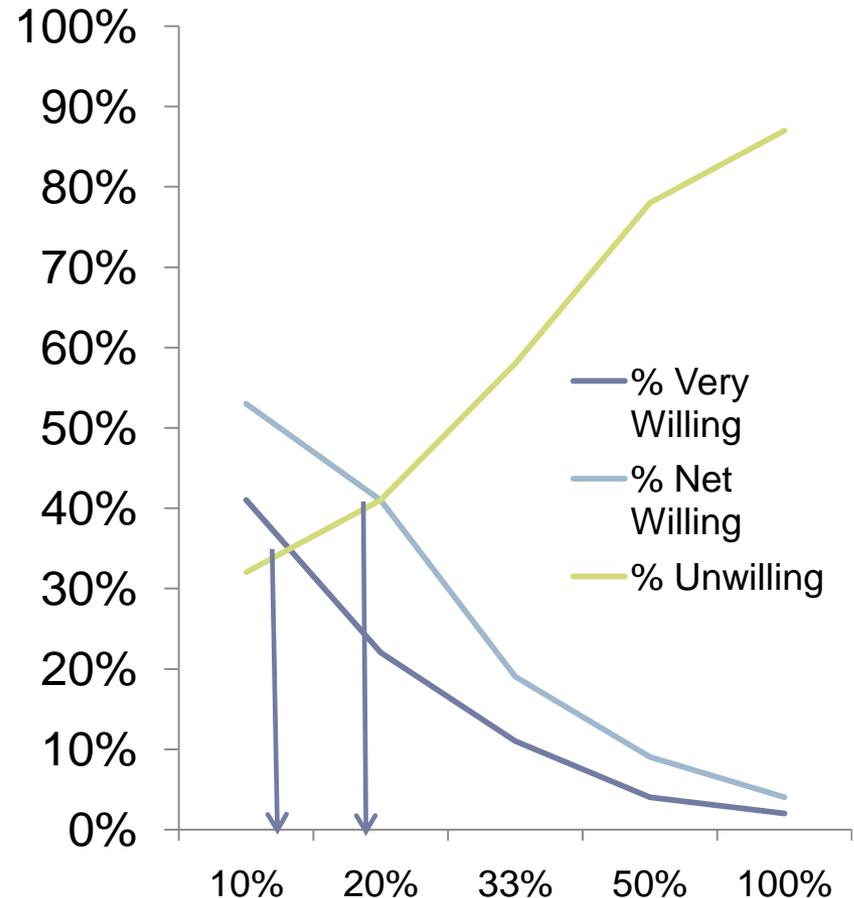


** % of respondents who indicated that they were “somewhat willing” or “very willing” to pay one or more of the five premium amounts presented

Premium Amount Willing to Pay

- Riders appear willing to pay a 14 to 20 percent premium over the current non-discounted vehicle fare to get a guaranteed space at a specific boarding time

Route / Average Fare	14%	20%
	Premium (rounded)	
Bainbridge, Bremerton, Kingston – \$14.45	\$2.00	\$2.90
Anacortes / San Juans – \$21.70	\$3.05	\$4.35

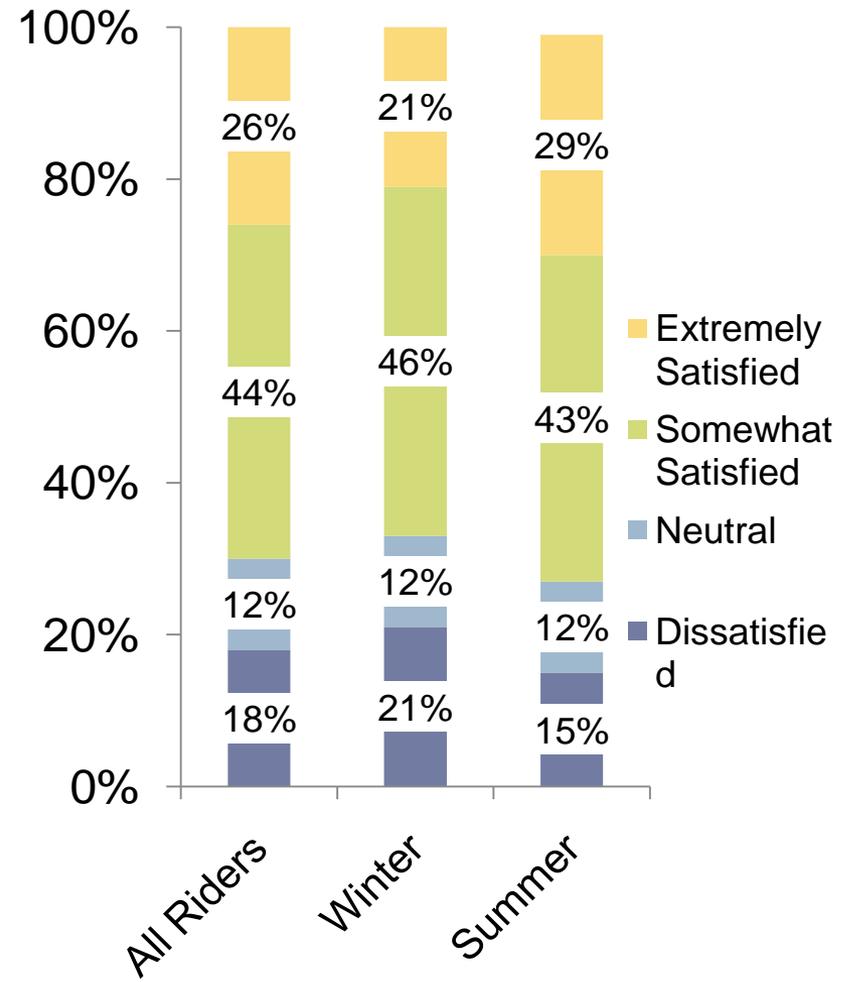


Key Findings

Attitudes toward WSF

Quality of Service

- ▶ The majority (70%) of WSF riders are satisfied with riding WSF
 - ▶ The higher levels of satisfaction during the summer months most likely reflects the greater number of riders traveling for leisure and recreation purposes



Quality of Service by Route

- ▶ Riders on five routes are the most satisfied
 - ▶ Seattle / Bainbridge, Edmonds / Kingston, Mukilteo / Clinton, Anacortes / San Juans, and Anacortes / Sidney
- ▶ Riders on three routes are the least satisfied
 - ▶ Point Defiance / Tahlequah, Fauntleroy / Vashon, and Seattle / Bremerton

	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/ CLI	FAU/ VAS	FAU/ SOU	PTD/ TAH	PTT/ KEY	ANA/ SAN	ANA/ SID
Extremely Satisfied	29%	19%	28%	27%	16%	19%	16%	28%	25%	35%
Somewhat Satisfied	46%	44%	44%	44%	35%	47%	31%	41%	46%	44%
Neutral	9%	13%	13%	13%	14%	13%	13%	11%	15%	7%
Net Dissatisfied	16%	24%	15%	16%	35%	21%	41%	19%	14%	14%
Mean	3.86	3.52	3.80	3.79	3.22	3.60	3.11	3.73	3.80	3.99

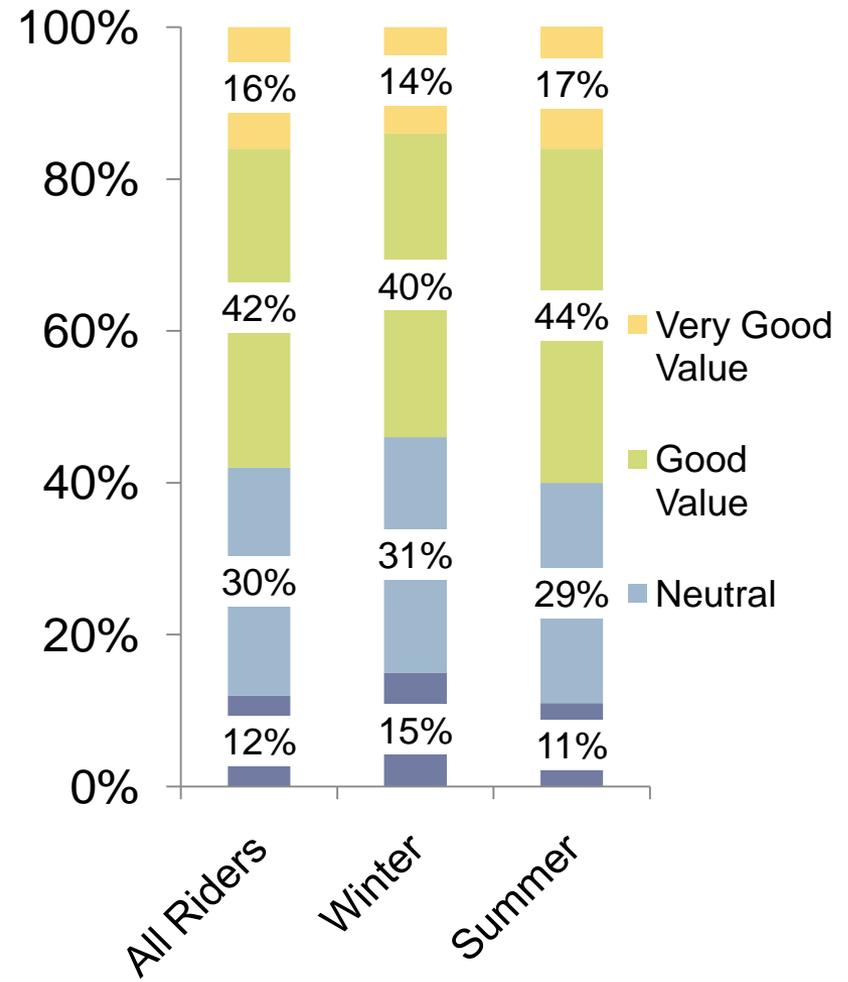
Quality of Service by Boarding Mode

- ▶ There are no significant differences in the percentage of vehicle drivers, vehicle passengers, and walk-on passengers who are satisfied with riding
- ▶ However, a greater percentage of vehicle drivers and walk-on passengers express dissatisfaction

	All Riders			Winter			Summer		
	Vehicle Driver	Vehicle Passenger	Walk-On	Vehicle Driver	Vehicle Passenger	Walk-On	Vehicle Driver	Vehicle Passenger	Walk-On
Extremely Satisfied	25%	28%	25%	22%	20%	19%	28%	33%	29%
Somewhat Satisfied	44%	44%	45%	45%	47%	46%	43%	42%	45%
Neutral	12%	14%	11%	11%	14%	12%	13%	14%	10%
Net Dissatisfied	19%	14%	19%	22%	19%	23%	17%	12%	16%
Mean	3.71	3.83	3.71	3.62	3.63	3.54	3.78	3.94	3.82

Value of Service

- ▶ Similarly, the majority (58%) of WSF riders feel that riding the ferries is a good value
- ▶ The peak season surcharges do not negatively impact perceived value
 - ▶ In fact, summer riders feel that WSF is a better value than do winter riders



Value of Service by Route

- ▶ Riders on Anacortes / Sidney and Port Townsend / Keystone routes rate WSF highest for value of service
- ▶ Consistent with their lower satisfaction ratings, riders on Fautleroy / Vashon and Point Defiance / Tahlequah give WSF a below average rating for value of service

	SEA/ BAI	SEA/ BRE	EDM/ KIN	MUK/ CLI	FAU/ VAS	FAU/ SOU	PTD/ TAH	PTT/ KEY	ANA/ SAN	ANA/ SID
Very Good Value	17%	15%	14%	18%	5%	13%	6%	24%	16%	28%
Good Value	43%	41%	43%	43%	31%	45%	28%	47%	43%	48%
Neutral	29%	29%	30%	28%	36%	30%	39%	21%	32%	20%
Net Poor Value	11%	15%	13%	11%	28%	13%	27%	7%	8%	4%
Mean	3.65	3.51	3.56	3.66	3.05	3.55	3.05	3.86	3.66	4.00

Value of Service by Boarding Mode

- ▶ Not surprisingly, given the fares, vehicle and walk-on passengers feel that WSF is a better value than do vehicle drivers
 - ▶ While summer walk-on and vehicle passengers feel WSF is a better value than do their winter counterparts, there is little change in perceived value between winter and summer vehicle drivers

	All Riders			Winter			Summer		
	Vehicle Driver	Vehicle Passenger	Walk-On	Vehicle Driver	Vehicle Passenger	Walk-On	Vehicle Driver	Vehicle Passenger	Walk-On
Very Good Value	14%	16%	17%	15%	13%	14%	13%	18%	19%
Good Value	41%	45%	42%	39%	43%	39%	42%	46%	45%
Neutral	31%	29%	28%	30%	31%	31%	32%	28%	26%
Net Poor Value	14%	10%	13%	17%	12%	16%	12%	8%	10%
Mean	3.52	3.66	3.62	3.49	3.55	3.48	3.56	3.72	3.71

Key Findings

General Market Area Survey

Background

▶ Purpose

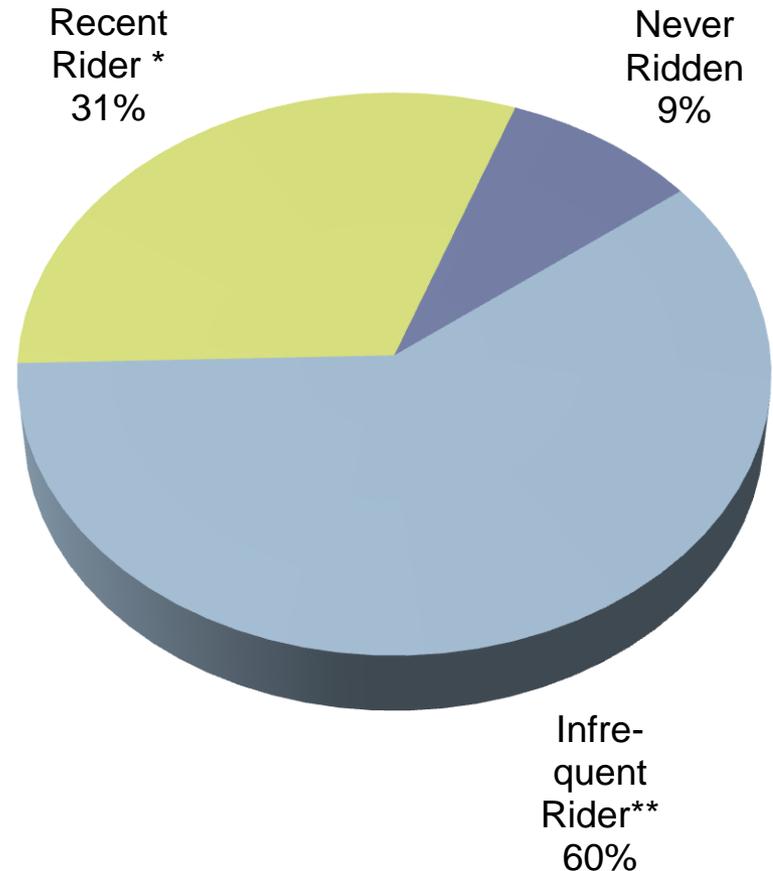
- ▶ Provide a reliable estimate of current and past ridership among residents of areas immediately surrounding the Puget Sound

▶ Methodology

- ▶ 1,240 telephone surveys completed with a random sample of residents living in counties surrounding Puget Sound that are most likely to use the ferries
 - ▶ East of Puget Sound: King, Snohomish, Pierce, Skagit (n = 850)
 - ▶ West of Puget Sound: Island, Kitsap, Jefferson (east), Clallam (east) (n = 333)
 - ▶ Island: Vashon, San Juans (n = 57)

Ridership on WSF

- ▶ Nine out of ten (91%) people living in areas served by the WSF have ridden a Washington State Ferry
- ▶ Clearly demonstrates that WSF is a resource that serves nearly all area residents

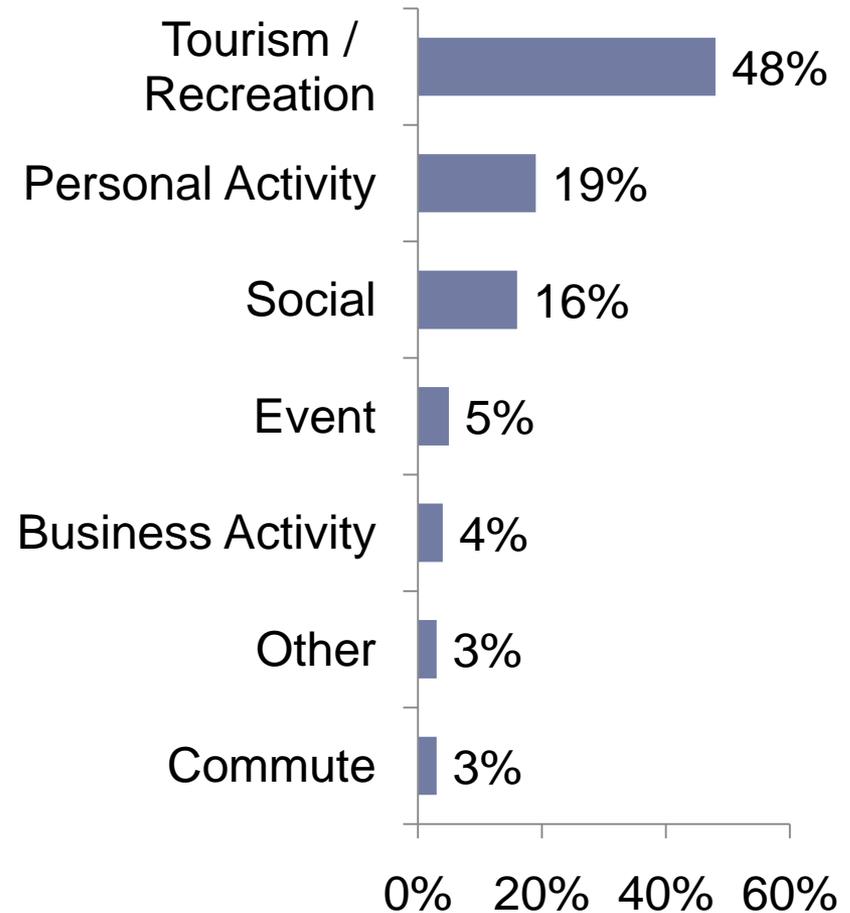


* Ridden in past 3 months

** Ridden but not in past 3 months

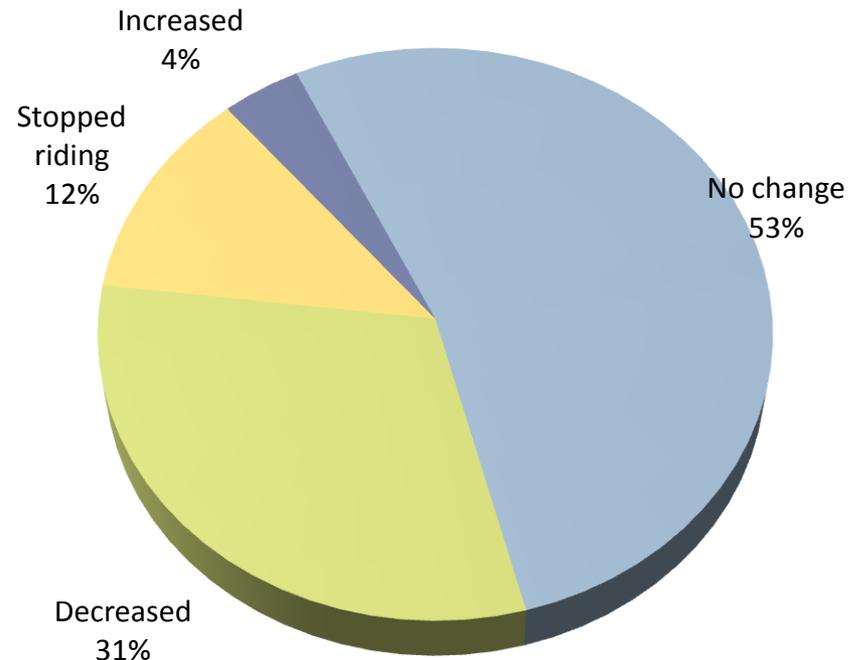
Purpose of Last Ferry Trip

- ▶ As would be expected, the majority of infrequent riders use the ferry for recreational travel, social visits to friends and family, and for other personal activities



Change in Frequency of Riding

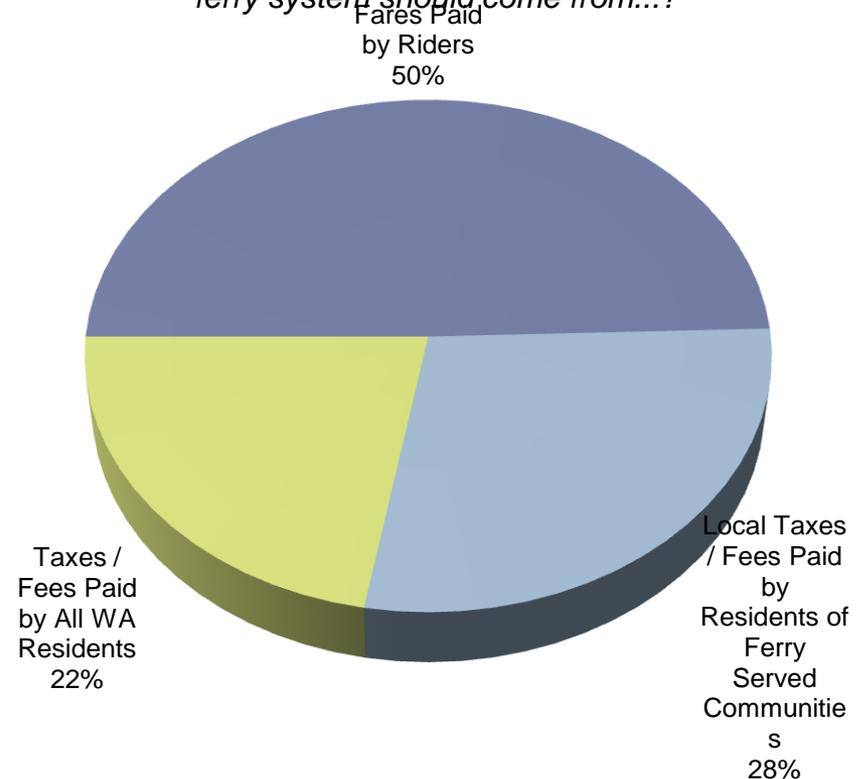
- ▶ Most (53%) infrequent riders say they have not changed the frequency with which they ride
- ▶ 12% of all infrequent riders say they have stopped riding completely
 - ▶ All (100%) of those who state they have stopped riding completely say that the primary reason is because they no longer do what they used to do and thus no longer need to ride
- ▶ 31% of all infrequent riders say they are **riding less**
 - ▶ Reasons given for riding less often include: no longer have a need (59%) and/or fares are too high (38%)



Distribution of Costs

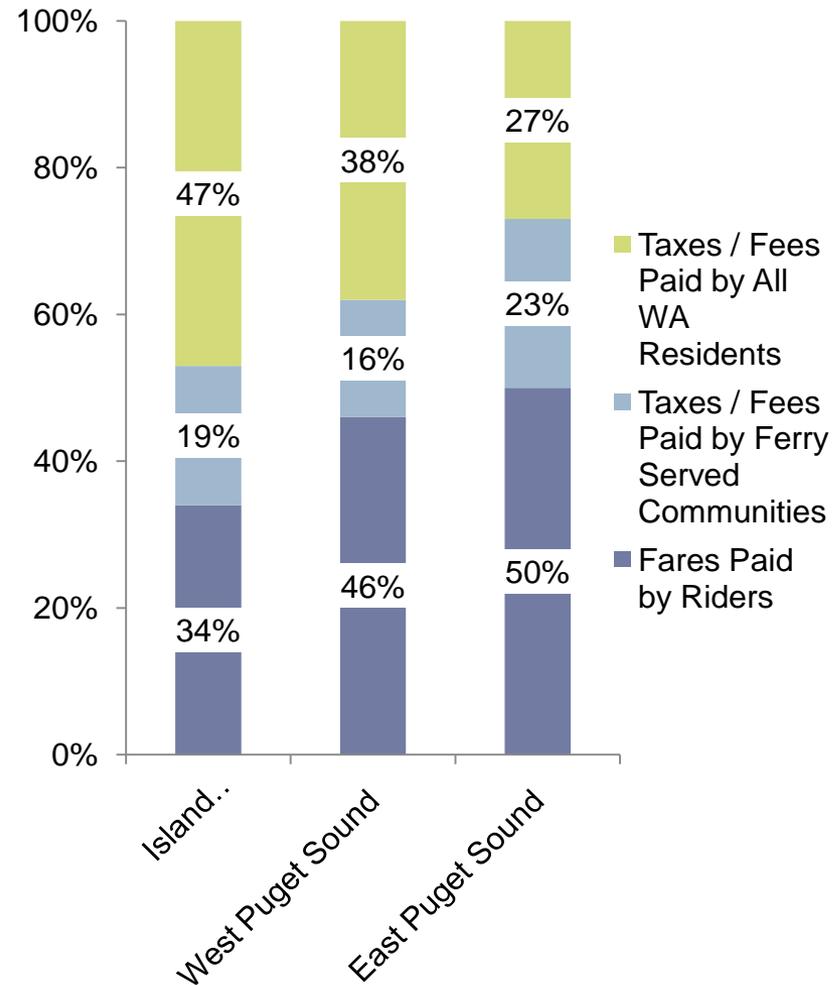
- ▶ Puget Sound residents feel that half of the cost of maintaining the system should come directly from those riding the ferries
 - ▶ This is the amount they were told is amount of operating costs currently paid for by riders
- ▶ They feel that 28 percent of the cost should come from local taxes or fees paid by residents of ferry-served communities
- ▶ They feel the balance (22%) of the cost of operating the system should come from state taxes paid by all WA residents
 - ▶ This would suggest that Puget Sound residents would like to see the ferry communities assume a greater burden for funding the system

Question: Currently 50% of the ferry system's revenues come from ferry users and 50% comes from general taxes paid by Washington State residents and 0% comes from local taxes in communities served by the ferries. What percent of the cost to maintain the ferry system should come from...?



Distribution of Costs by Area of Residence

- ▶ Those living in the Island communities (Vashon and San Juan Islands) distribute the costs more evenly between those who use the ferry and/or live in the communities served by the ferries and all state residents
- ▶ West Puget Sound residents (Island, Kitsap, Jefferson, Clallam) and East Puget Sound residents (King, Snohomish, Pierce, Skagit) feel that 46 to 50 percent of the system costs should be paid by riders
 - ▶ West Puget Sound residents allocate a greater percentage of the costs to all state residents
 - ▶ East Puget Sound residents allocate a greater percentage to the ferry served communities



Other Research / Next Steps

Research and Next Steps

- ▶ All work scheduled for completion by 10/31/2008
- ▶ Final report and presentation to the commission at their 11/18/2008 – 11/19/2008 meeting in Olympia

	Done	Underway
Winter On-Boards	√	
Summer On-Boards	√	
General Market Area Survey	√	
Freight Survey	√	
Fare Elasticity Conjoint	√	
Mode Shift Conjoint		√
Analysis & Consolidated Report		√