



market decisions
CORPORATION



Washington State
Transportation Commission

2010 Ferry Rider Summer Survey - *Summary Report*

Presented to the Joint Transportation Committee
October 12, 2010



Preface

- ❖ In 2010, the Washington State Transportation Commission (WSTC) changed the process of how research is conducted regarding Washington State Ferries (WSF). In the past, 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 travelers will have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions).
- ❖ The research initiative in 2010 consists of the following main phases:
 - Spring Customer Survey
 - Mode Shift and Elasticity of Demand Research
 - Freight Survey
 - General Market Assessment Survey
 - Summer Customer Survey
 - Capital Funding
 - Fare Strategies
- ❖ The focus of this report is the Summer Customer Survey.
 - A comprehensive report of all phases will be available January 2011.
 - Breakouts of all survey data by Legislative District will be available.
- ❖ All research was conducted by Market Decisions Corporation with input from the WSTC Research Team. For questions about this research, please contact Reema Griffith at WSTC ☎ (360) 705-7070.



Methodology

- ❖ The following presents the findings for the Summer 2010 survey and provides comparisons (where applicable) with the Winter 2010 survey findings. The main objective of this research is to understand from the ferry riders' perspective their travel behavior, opinions and attitudes regarding important issues currently facing the Washington State Transportation Commission and Washington State Ferries. Areas explored include:
 - Ferry travel activity - ferry travel from January 3 through March 27 & June 20 through September 25, 2010.
 - Recreational usage - understand usage of ferries for recreational and social purposes.
 - Tariff issues - gauge support of various options to manage vehicle demand and reduce congestion.
 - Reservation System - determine support and importance of features for potential reservation system.
 - Ferry operating costs - measure support of changes in ferry fares for out-of-state passengers.
 - Service and amenity importance and satisfaction.
 - Profiling ferry customers - travel patterns, WSF satisfaction and demographic data.
- ❖ 8,463 ferry riders completed the Summer and Winter 2010 surveys yielding a maximum sampling variability of +/- 1.1% at the 95% confidence level.
 - 4,315 ferry riders completed the Summer survey between July 28, 2010 and August 18, 2010 (maximum variability +/- 1.5% at the 95% confidence level) and 4,173 completed the Winter survey between April 6, 2010 and May 28, 2010 (maximum variability +/- 1.5% at the 95% confidence level).
- ❖ The data were weighted by route and boarding method for the last trip taken in order to make the survey results proportionate to overall ferry ridership and to allow comparisons to the 2008 survey data.
 - Significant increases in the summer survey are noted in **green and bolded**; significant decreases are noted in **red and bolded**.



General Ridership



Key Findings

- ❖ Seattle/Bainbridge, Edmonds/Kingston and Mukilteo/Clinton are the most travelled ferry routes during both the summer and winter months.
 - Summer ridership is significantly higher than winter ridership on the Fauntleroy/Southworth, Port Townsend/Coupeville, Anacortes/San Juan Islands and Inter San Juan Islands routes.
 - Seattle/Bremerton (79%), Seattle/Bainbridge (72%) and Fauntleroy/Southworth (72%) have the highest percentage of commuting trips per month during the summer travel period.
 - All routes, with the exception of Southworth/Vashon, have a higher percentage of commuting trips in the winter months.
 - Anacortes/Sydney (71%) and Port Townsend/Coupeville (60%) have the highest percentage of recreational or social trips per month, while Seattle/Bremerton (22%) and Fauntleroy/Southworth (21%) have the lowest.
- ❖ The primary factors that determine whether to take the ferry or drive around are faster travel time by ferry (47%) and long waiting lines waiting to catch the ferry (44%).
- ❖ 29% of summer riders primarily ride to commute to and from work, down significantly from the winter wave (39%). In 2008 25% of summer riders and 36% of winter riders were commuters.
 - As one would expect in the summer months, the number of respondents reporting the purpose of their last ferry ride as recreation/tourism or travel to/from family and friends have both increased significantly compared to the winter survey (18% vs. 6% and 20% vs. 14%, respectively).
- ❖ 84% of ferry riders boarded the ferry in a personal car, either as a driver or as a passenger in a vehicle, while one-third walked-on.
 - The percentage of walk-on passengers has increased significantly in the summer period (33% vs. 27%).
- ❖ The most common ticket types for summer riders are single ride tickets (38%) and multi-ride frequent user tickets (35%).

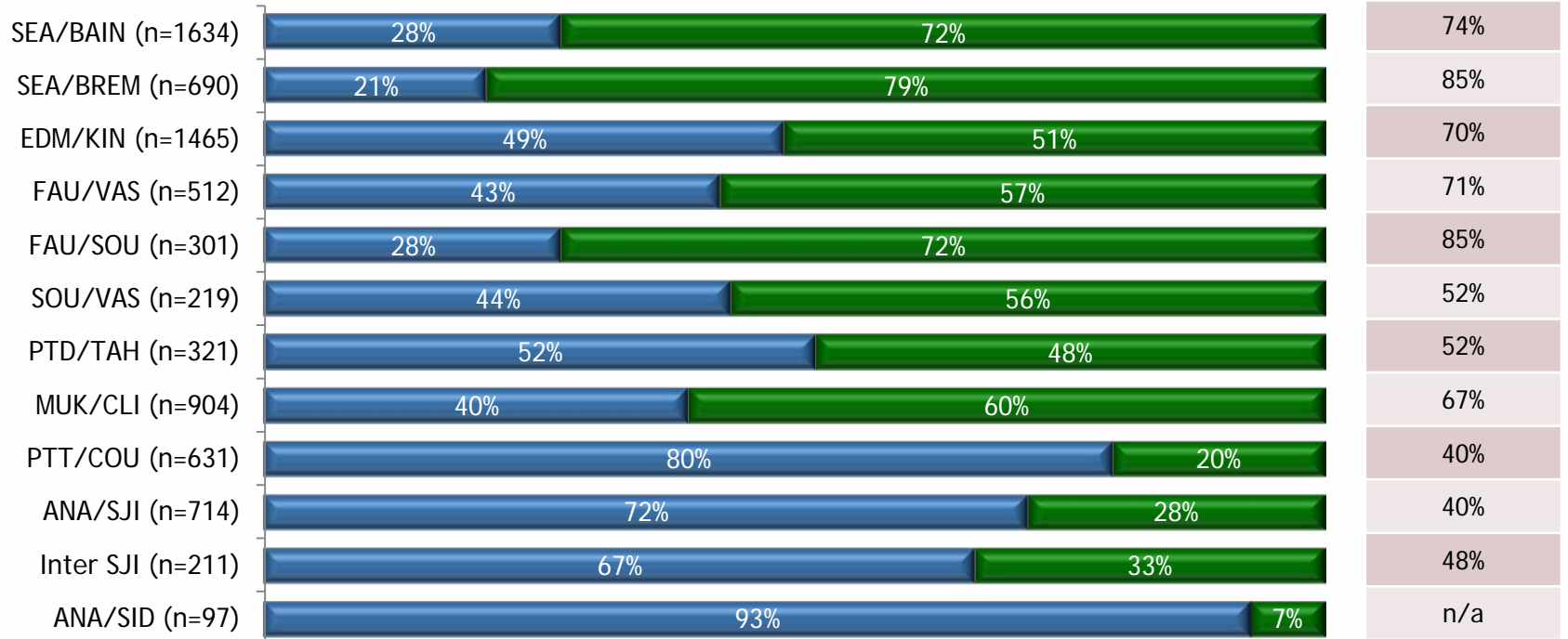


Summer Period Ridership - Commuters

- ❖ Seattle/Bremerton (79%), Seattle/Bainbridge (72%) and Fauntleroy/Southworth (72%) have the highest percentage of commuting trips per month during the summer travel period.
- ❖ All routes, with the exception of Southworth/Vashon, have a higher percentage on commuting trips in the winter months.

Ratio of Commuters Per Month (of those who ride route)

■ Purposes other than commuting ■ Primarily for commuting



S2 How many of those trips will be primarily commuting (getting to and from work/school) and how many were primarily for recreational and social purposes?



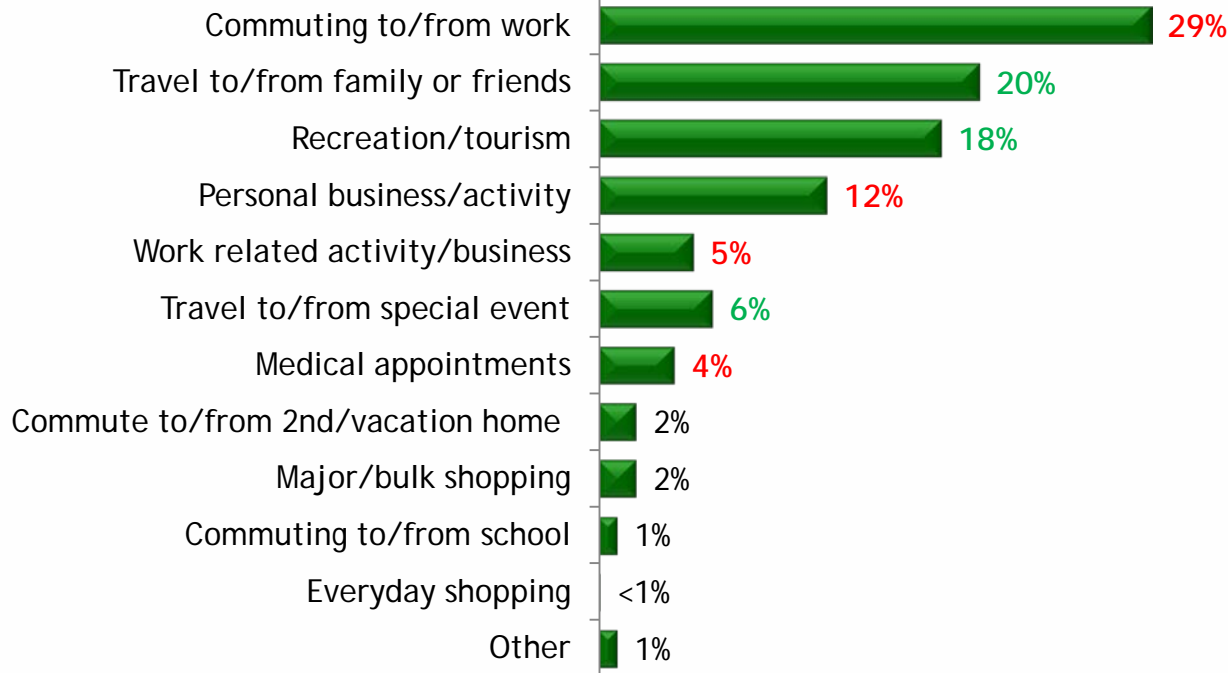
Purposes of Ferry Rides

- ❖ 29% of summer riders primarily ride to **commute to and from work**, down significantly from the winter wave (39%). Even in winter, commuters account for fewer than 2 out of 5 ferry riders.
- ❖ As one would expect in the summer months, the number of respondents reporting the purpose of their last ferry ride as **recreation/tourism**, **travel to/from family and friends** or **travel to/from special events** has increased significantly compared to the winter survey (18% vs. 6%, 20% vs. 14% and 6% vs. 4%, respectively).

Purposes of Ferry Rides

(n=4,239)

Winter (n=4,168)	
Commuting to/from work	39%
Travel to/from family or friends	14%
Recreation/tourism	6%
Personal business/activity	15%
Work related activity/business	8%
Travel to/from special event	4%
Medical appointments	7%
Commute to/from 2nd/vacation home	2%
Major/bulk shopping	1%
Commuting to/from school	1%
Everyday shopping	1%
Other	<1%

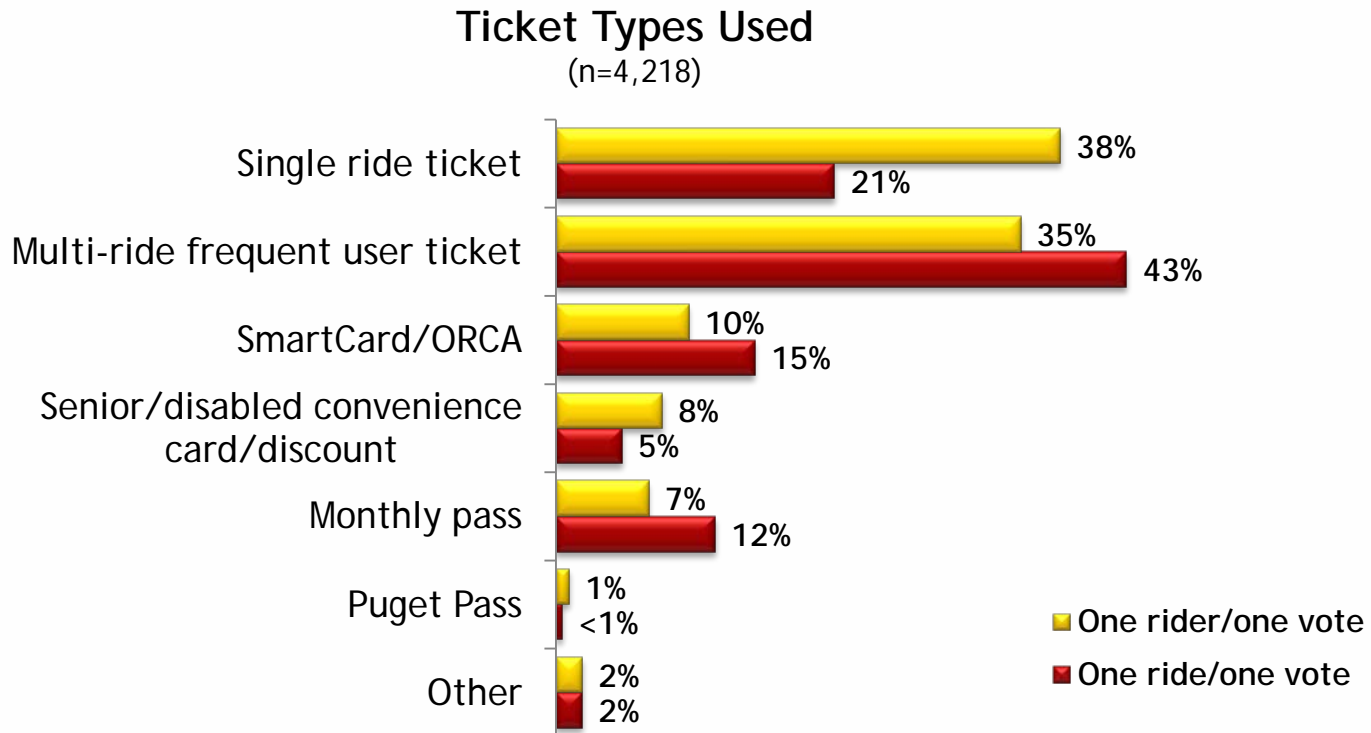


Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?



Ticket Types Used

- ❖ The most common ticket types for summer riders are **single ride tickets** (38%) and **multi-ride frequent user tickets** (35%).
- ❖ Multi-ride tickets account for 43% of the tickets by volume.



N26 Thinking about your most recent/current trip, what kind of ticket were you travelling on?



Recreational and Social Travel



Key Findings

- ❖ Riders indicate that the number of ferry rides for recreation, social or special event purposes are largely unchanged compared to the 2009 survey.
- ❖ Visiting family and friends is by far the most frequently mentioned purpose of riders' last recreational or social trip.
- ❖ Only 13% of riders report that their last trip was part of a larger multi-state or multi-nation trip.
 - Those on the Port Defiance/Tahlequah route tend to be significantly more likely than others to have taken a ferry ride as part of a multi-state or multi-nation trip.
- ❖ When asked why they chose WSF over other ways of commuting to their destination, the most commonly mentioned response was because it is the fastest/most direct way.
 - Riders on the Seattle/Bremerton and Fauntleroy/Southworth routes tend to be significantly more likely than other riders to have chosen the ferry due to reasons related to enjoyment.
- ❖ Nearly one-third of riders could not offer any suggestions regarding areas in which they would like to see WSF improve, however the most common suggestion was the addition of more runs.
- ❖ Overall, riders feel that WSF is a good value during the summer season, though only 14% rate it as a "very good value."
 - Generally, respondents from the Port Townsend/Coupeville route are significantly more likely to give WSF positive value ratings than riders of other routes.

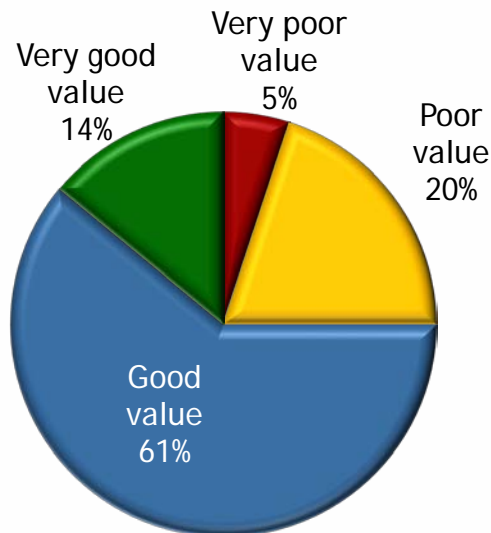


Perceived Summer Value

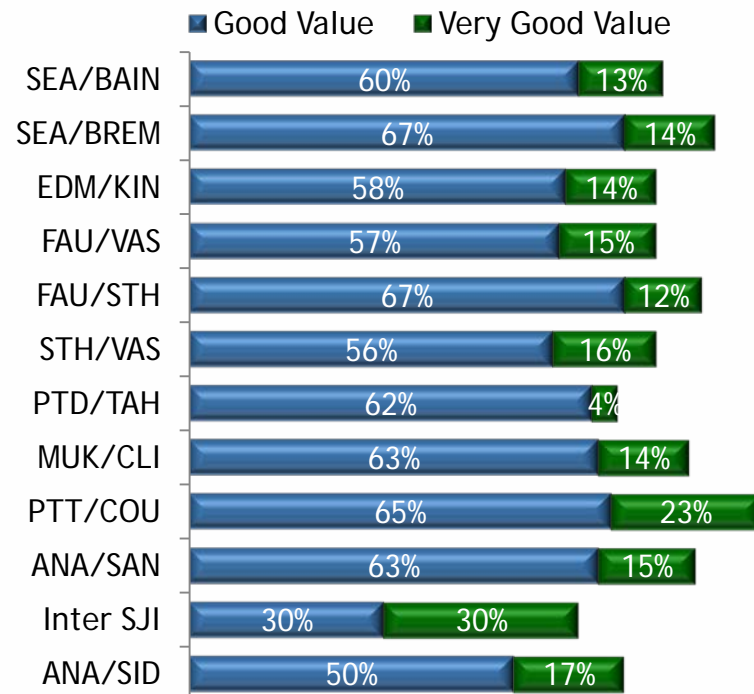
- ❖ 75% of riders feel that WSF is a **good value** during the Summer season; however, only 14% rate it as a “very good value.”
 - Those on the Port Townsend/Coupeville route tend to be significantly more likely to positively rate the value of WSF than riders of other routes.
 - Frequent riders give somewhat lower ratings than less-frequent riders (11% “very good value,” vs. 21%).

Perceived Summer Value

(n=3,898)



Perceived Value - By Route



N17 During the Summer season, do you feel that Washington State Ferries is...



Tariff and Surcharge



Key Findings

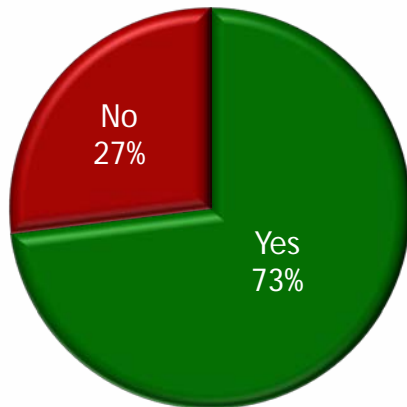
- ❖ 73% of riders support a higher price for a single trip and 64% agree that summer single-fare tickets should be priced higher than winter single-fare tickets.
 - Those who travel more often are more supportive of a higher price for a single trip.
- ❖ 52% of riders support charging an additional 10% over current summer single-fare prices during July and August as a way to manage wait times, while 33% oppose.
 - 44% of riders support a price increase of 5% during the peak summer period and a price decrease of 5% in non-peak seasons.
 - The greatest impact on rider behavior occurs at an increase of roughly 14%.
- ❖ 36% of riders are in support of a fuel surcharge to recoup some of the higher than expected fuel costs; 51% are against.
 - Summer riders are significantly more likely to support the fuel surcharge (40% vs. 33% winter).
 - 37% of respondents support a fuel surcharge that is capped at 20% of the fare price, regardless of how much it covers the extra fuel costs; 46% prefer applying the surcharge across all fares (both vehicle and passenger) equally.
- ❖ One quarter of ferry riders support introducing higher fares for out-of-state ferry passengers.
 - As expected, significantly fewer summer riders support the higher fares for non-residents, which is likely due to the larger number of out-of-state recreational travelers.
 - Of those in support of higher fares for non-residents, riders propose that non-residents be charged an average of 21% more than residents for ferry travel.
 - Of those who originally supported higher fares for non-residents, 62% remain supportive after considering the extra time that may be needed to verify residency.



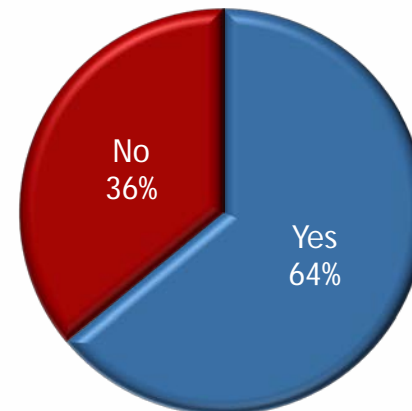
Support for Higher Single-Fare Pricing

- ❖ Three in four (73%) riders support a higher price for a single trip fare versus a frequent rider or multi-ride fare.
 - Support for a higher price for a single trip fare is higher when weighted by volume (one ride/one vote) - 79% vs. 73%.
 - Support is higher among more-frequent riders (80%).
- ❖ In addition, two thirds (64%) agree that summer season single-fare tickets should be priced higher than the same ticket during the winter season.

% Agree Higher Price for Single-Fare Ticket
(n=4,260)



% Agree Higher Price for Summer Single-Fare Ticket
(n=3,086)



- N18 *As a general policy, do you think the cost of a single-fare ticket for a single trip on the ferry should be priced higher than the same trip for a frequent rider/multi-ride card holder, or not?*
- N19 *As a general policy, do you believe that single-fare tickets for a single trip should be priced higher during the summer season than during the winter season?*

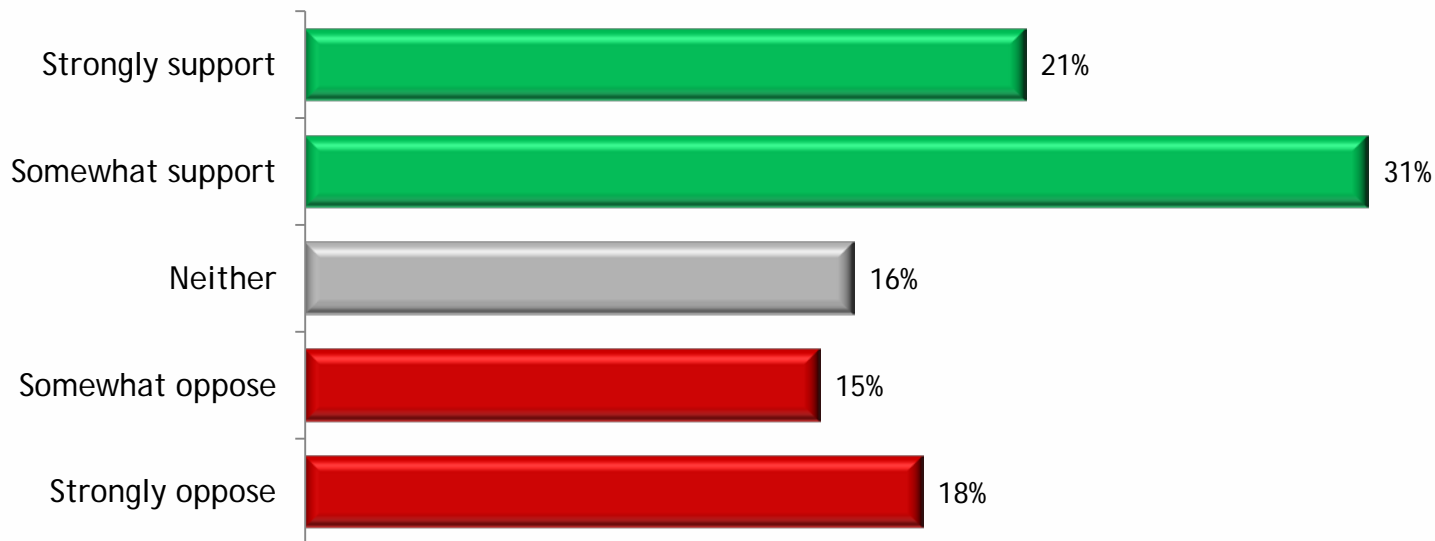


July/August Single-Fare Increase

- ❖ 52% of riders support charging an additional 10% over current summer single-fare prices during July and August as a way to manage wait times.
 - Conversely, 33% oppose the price increase during the months of July and August.

Support Higher Single-Fare Price July-August

(n=1,974)



N20 As a general policy, would you support or oppose WSF charging an additional 10% over the current summer single-fare ticket prices during the months of July and August when wait times are the greatest, as a way to manage wait times?



Impact of Peak Time Price Increases

❖ On average, a 1% increase in fares will reduce peak-period vehicle travel by 1.4%

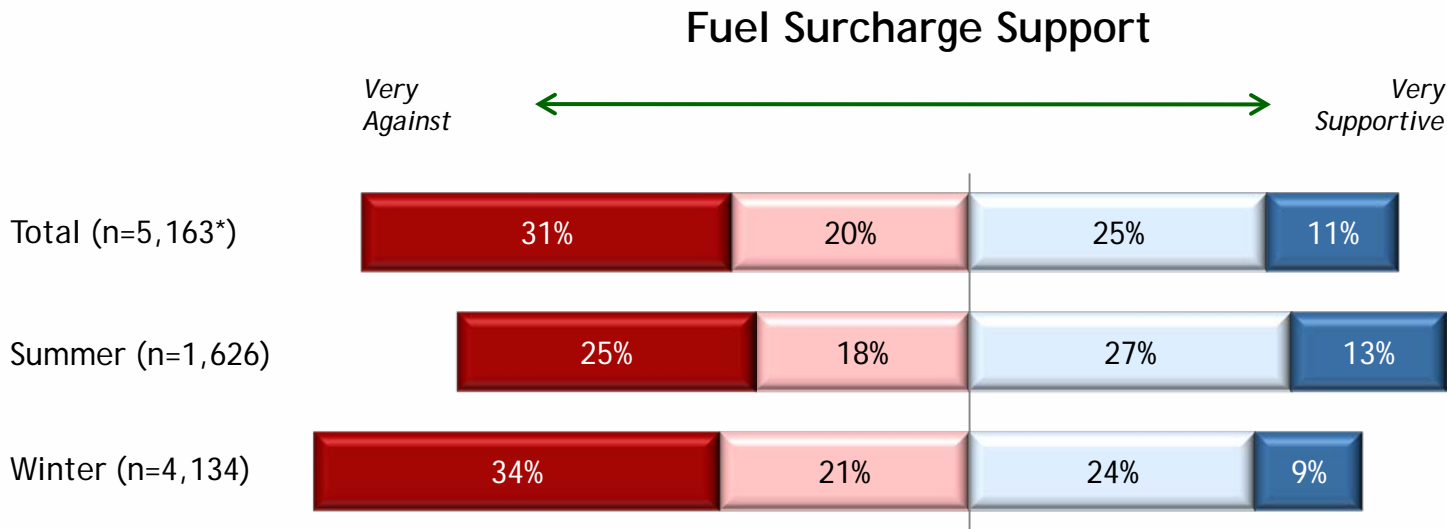
Support Off-Peak/Peak Fare Changes	5% Change (n=2,713)	10% Change (n=2,713)	15% Change (n=2,713)	25% Change (n=2,713)
I wouldn't change anything	52%	46%	39%	32%
Fewer vehicle trips during peak times; more during off-peak times	27%	35%	42%	48%
About the same trips during peak times; walk on more often	5%	5%	4%	3%
More vehicle trips during peak times	1%	1%	1%	1%
No impact; I don't take vehicle trips during peak times	14%			
No impact; this is the only ferry trip of the summer	1%			

Q2 How might this option impact your peak summer period vehicle travel (during the heaviest congested travel times) on the ferry if it was enacted?



Fuel Surcharge Support

- ❖ Overall, 36% of riders support a fuel surcharge to recoup some of the higher than expected fuel costs; however, 51% are against the implementation of a fuel surcharge.
 - Support is significantly lower when looking at summer riders, weighted by volume (31% vs. 40%).
 - Riders surveyed during the summer period are significantly more likely to support the fuel surcharge than riders during the winter period (40% vs. 33%).



*Only ratings of support (4-5) or lack of support (1-2) are shown.
Ratings of 3 or don't know are not shown.*

**Differs due to weighting*

Q3 How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?



Reservation System



Key Findings

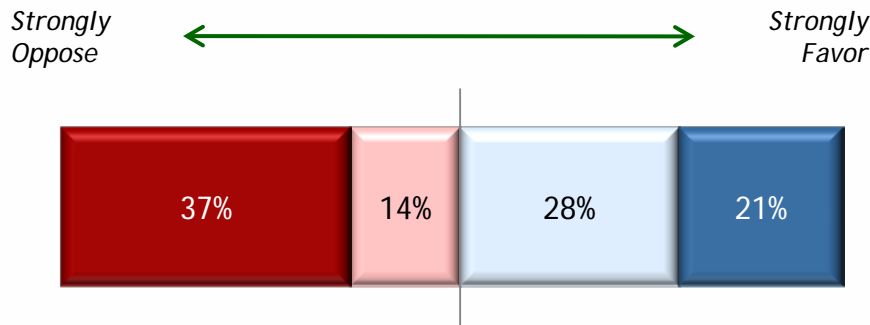
- ❖ Support for the implementation of a reservation system is highly divided, with 37% strongly opposed and 21% strongly in favor of the program.
 - Support for the reservation system is highest among riders of the Port Townsend/Coupeville and Anacortes/San Juan Islands routes.
 - The reservation system has the most opposition from riders on the Point Defiance/Tahlequah, Fautleroy/Vashon and Mukilteo/Clinton routes.
- ❖ Respondents most commonly indicated that if the reservation system were in place, they would either rarely (29%) or never (13%) use the program.
 - The routes that tend to mention the intent to use the system every time more often include Edmonds/Kingston, Port Townsend/Coupeville and Anacortes/San Juan Islands.
 - Riders of the Seattle/Bremerton and Southworth/Vashon routes tend to mention that they would never use the reservation system more frequently than other riders.
- ❖ The most important feature of the possible system is enhanced information/signage regarding current ferry status available before arriving to the terminal.
 - The least important features include reservations on non-commuter sailings available six months in advance and a maximum of 90% of space available for reservations during peak periods.



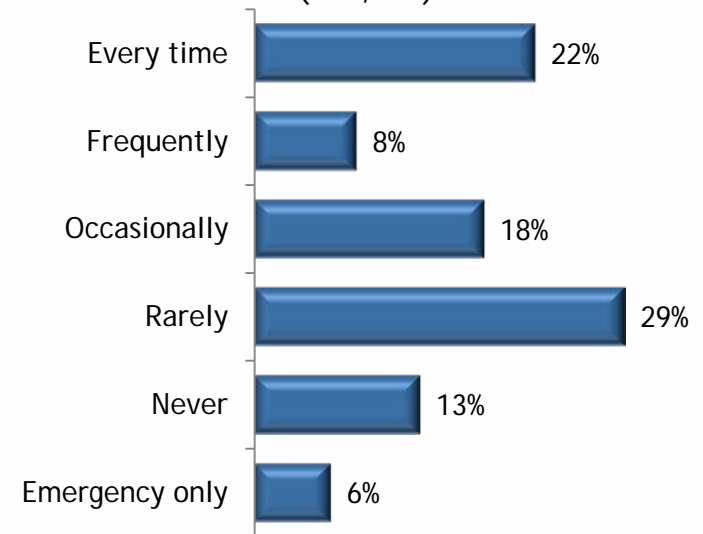
Reservation Program - Support and Use

- ❖ Riders are split in their support for a reservation system, with 49% in favor and 51% opposed to the implementation of the program.
 - Reservation system support decreases when referencing summer riders, weighted by volume (44% vs. 49%).
- ❖ When asked how often they would use the reservation system if it were in place, the top mentioned response was rarely (a few times per year or for recreational trips only) at 29%.
 - However, one fifth (22%) of riders report they would most likely take advantage of the reservation system every time they drive onto the ferry (27% among more-frequent riders).

Reservation Program Support (n=3,981)



Expected Use of Reservation System (n=4,078)



RS1 Based on the information above, would you favor or oppose WSF offering the above vehicle reservation program?

RS2 If the vehicle reservation system described was offered, how often would you take advantage of the system to reserve a guaranteed space on the ferry for your vehicle at a specific boarding time?



Ferry Services and Amenities



Key Findings

- ❖ Cleanliness of vessels and minimal arrival time prior to departure are the highest rated ferry services based on importance.
 - During the summer months, satisfaction with cleanliness of vessels increased; however, satisfaction with minimal arrival time prior to departure decreased greatly, thus remaining the area with the greatest opportunity to improve.
- ❖ 23% of riders feel that the loading and unloading process could be done better or more efficiently, primarily on the Seattle/Bainbridge (39%) and Edmonds/Kingston (27%) routes.
 - The top suggestions for improving the efficiency of the loading and unloading process are “training employees/improve customer service” (24%) and “better dock and street level traffic control” (18%).
- ❖ Usage of all ferry services and amenities has decreased in the summer months.
 - 63% of ferry riders use the galley service, 45% use the information center, and 22% use the vending machines.
 - 23% of ferry riders do not use any of the services or amenities offered.
 - Of those who provided suggestions for additional on-board services and amenities, access to free/cheaper WiFi (16%) and better quality food options (15%) are the most frequently mentioned.
- ❖ The majority (71%) of ferry riders use the WSF website to obtain information about the ferries.
 - With the exception of family/friends and the printed schedule, summer riders are significantly less likely than winter riders to use each of the information sources regarding the ferry system.
 - 38% of riders would use highway advisory radio for WSF information, if it were available.



Rider Satisfaction

- ❖ Satisfaction does not vary significantly by frequency of ridership.
 - Reservation system support decreases when referencing summer riders, weighted by volume (44% vs. 49%).

Ferry Satisfaction	Total 2010 n=5,227**	Summer 2010 n=1,651	Winter 2010 n=4,170	Total 2008 n=12,156	Summer 2008 n=7,204
Satisfied	75%	80%	72%	68%	72%
Extremely satisfied	27%	30%	25%	25%	29%
Somewhat satisfied	48%	50%	47%	43%	43%
Neither	10%	9%	11%	12%	12%
Somewhat dissatisfied	12%	9%	14%	15%	13%
Extremely dissatisfied	3%	3%	3%	5%	3%
Dissatisfied	15%	12%	17%	20%	16%