



Washington State Transportation Commission
WSF Winter Policy Study – FROG Survey
June 2014
Executive Summary Presentation

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.

The FROG research initiative in 2014 consists of the following main phases:

- Winter Customer Survey Study (target audience: commuter riders) via FROG
- **Winter Policy 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 summary is the Winter Policy Study.

EMC Project/Document #: 14-5035

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- ▶ Online Survey of Washington State Ferry Riders Opinion Group (FROG)
- ▶ Conducted June, 2014
- ▶ 3,912 Total Interviews
- ▶ Data was weighted by route and boarding method based on the last trip taken

Please note that due to rounding, some percentages may not add up to exactly 100%.

Executive Summary



- ▶ Most (75%) ferry riders anticipate riding the same amount over the next two years. 15% say they will ride the ferry more and only 10% say they will ride less. The top reason given for riding less is a move or job change to a location that does not require ferry travel.
- ▶ Over a quarter (26%) of ferry riders say they have taken the ferry going eastbound in conjunction with going westbound on the Tacoma Narrows bridge. Of those who have made a ferry eastbound / bridge westbound combined trip, almost two thirds (61%) say they make the trip less than once a month.
- ▶ Half (49%) of ferry riders who have boarded the ferry as a vehicle driver or passenger say they would definitely (29%) or probably (20%) walk on the ferry more if transit service was reliable, coordinated, and easy to use on both sides of the ferry trip.
- ▶ Two thirds (68%) of walk/bike on ferry riders say public transportation service reductions will not have an impact on their decision to continue to walk/bike on the ferry. However, a third (31%) say service reductions will have some impact their decision to walk on/bike on the ferry.
- ▶ The majority (70%) of ferry riders prefer current car size categories rather than paying by the foot. A third (32%) say the under 14 feet car length discount has some or a lot of influence on their decision to purchase a car under 14 feet.
- ▶ Almost half (48%) of ferry riders say fares should be left as is or are not sure, a third (32%) say fares should be decreased. Only one in five (19%) ferry riders say fares should be increased to cover daily operating costs.

Executive Summary



- ▶ The majority (52%) of ferry riders say fare increases should be the same for both walk on and vehicle/drivers, however a plurality (45%) agree that vehicle/driver fare increases should be higher than passenger walk on.
- ▶ The majority (68%) of walk/bike on ferry riders say public transportation service reductions will not have an impact on their decision to continue to walk/bike on the ferry. Almost a third (31%) say service reductions will have some impact on their decision to walk on/bike on the ferry.
- ▶ Most riders (86%) say increased land side travel alternatives will have little or no impact on their decision to walk on to the ferry instead of driving. Only one in ten (14%) ferry riders say increased land side travel alternatives will largely (3%) or somewhat (11%) impact their decision.
- ▶ Only a quarter (26%) of ferry riders say they have used WSF Wi-Fi service. And almost two thirds (63%) of those who have used the Wi-Fi service give a negative rating of fair, poor or very poor.
- ▶ Initially, a majority (55%) of ferry riders are interested in a passenger only ferry, but interest significantly decreases when asked about doubling the current vehicle ferry walk-on fare to cover the cost.
- ▶ There is minimal interest in dedicating a \$0.25 fare increase to new amenities. For a \$0.25 fare increase just over a third (36%) say they are interested in enhancing transit services and 35% are interested in providing free Wi-Fi at terminals and on ferry boats. Only a quarter (26%) of ferry riders are interested in expanding park and ride lots at home side terminals and (23%) say they are interested in instituting Good2Go as fare payment method from a \$0.25 fare increase.

Changes Over Last Year in Ferry Ridership

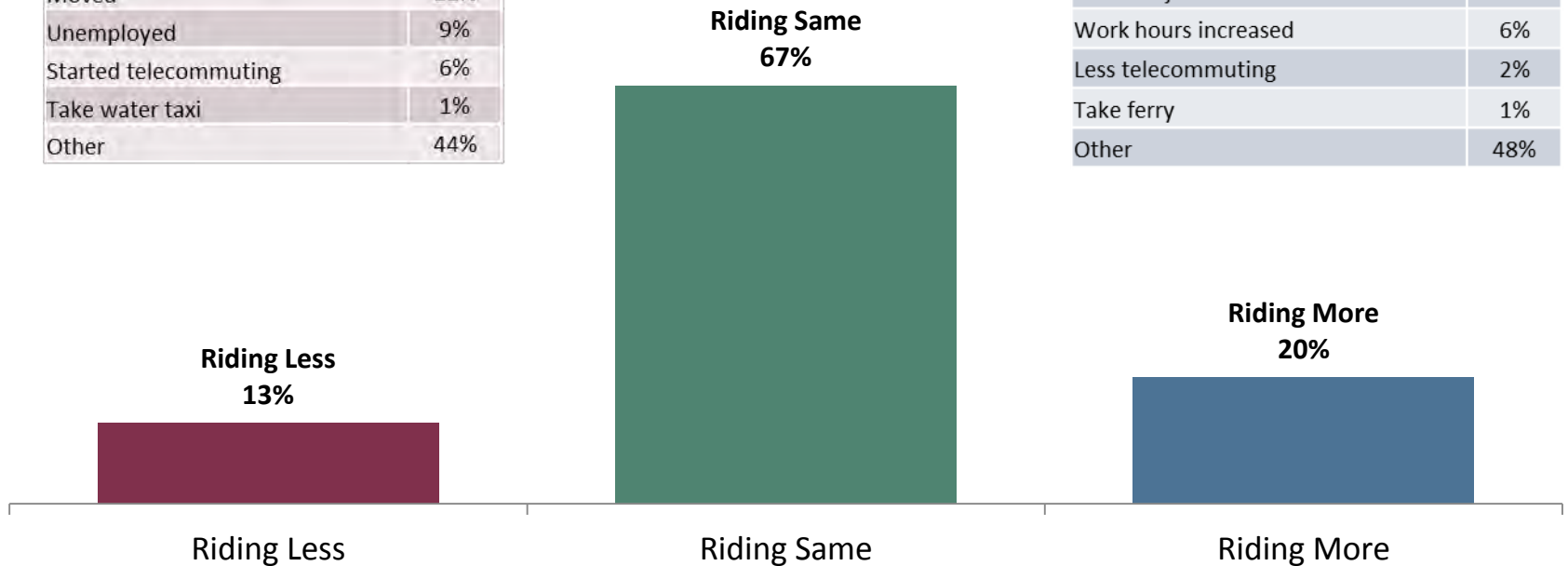


From the winter performance survey, 67% of ferry riders say compared to a year ago they ride the same amount. 20% say they ride more and 13% say they ride less. The top reason given for riding more and less is a job change or move.

Winter Performance Survey (n=3420)

Top Reasons for Less Ridership	
Retired/changed jobs	30%
Moved	11%
Unemployed	9%
Started telecommuting	6%
Take water taxi	1%
Other	44%

Top Reasons for More Ridership	
Moved	24%
Changed jobs	13%
Got new job	6%
Work hours increased	6%
Less telecommuting	2%
Take ferry	1%
Other	48%



Compared to one year ago (Winter January – April 2013) would you say you personally...

6A. A. Why do you ride the ferries less now?

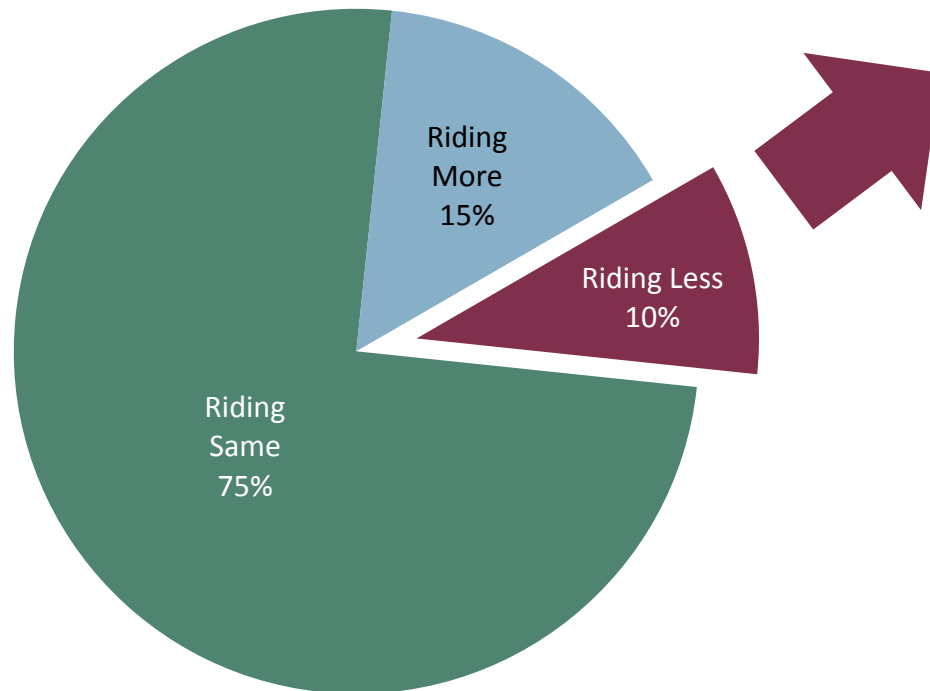
* - Data from 2014 Winter Performance Study

Expected 2 Year Change in Ferry Ridership



Three in four (75%) ferry riders anticipate riding the same amount over the next two years. 15% say they will ride the ferry more and 10% say they will ride less. The top reason given for riding less is a move or job change.

Expected Change in Next 2 Years
(n=3912)



Top Reasons for Less Ridership in the Future	
Plan to move/change jobs to a location that doesn't require as much ferry travel	42%
Plan to retire	21%
Plan to telecommute/will telecommute more	6%
Plan to be employed part-time only	5%
Other	32%

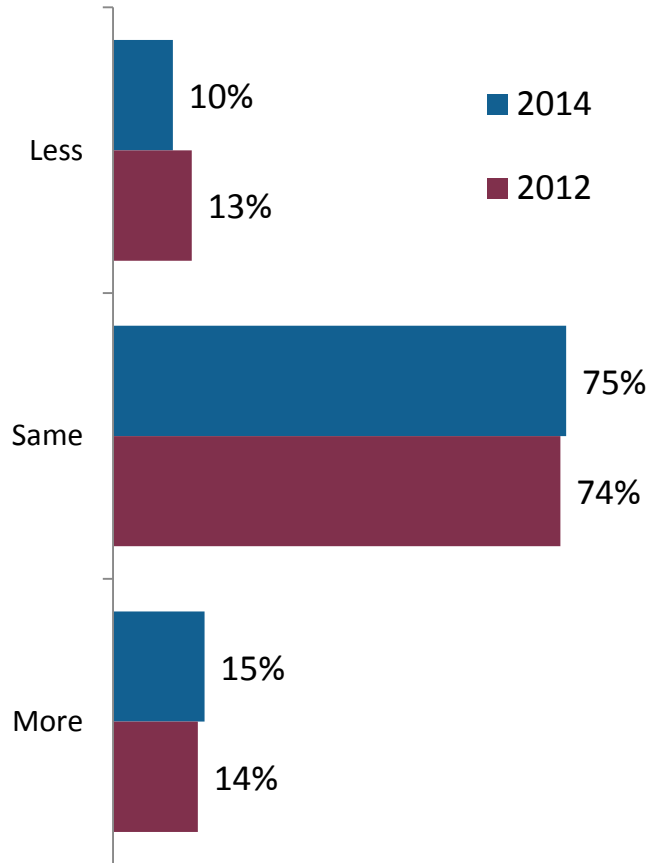
- Looking forward two years, how would you guess your ferry ridership will change, if it all?
- What is the main reason you anticipate you will ride the ferries less in the next 2 years?

Expected 2 Year Change in Ferry Ridership



Reponses from are similar to 2012

Expected Ferry Ridership Change in Next 2 Years



Top Reasons for Less Ridership in the Future	2014	2012
Plan to move/change jobs to a location that doesn't require as much ferry travel	42%	31%
Plan to retire	21%	13%
Plan to telecommute/will telecommute more	6%	12%
Plan to be employed part-time only	5%	5%
Other	32%	19%

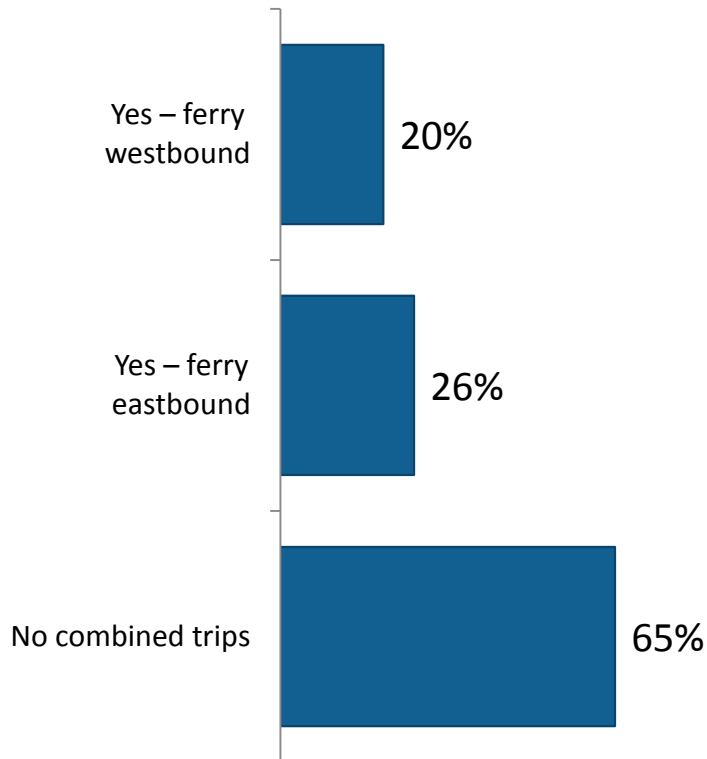
2. Looking forward two years, how would you guess your ferry ridership will change, if it all?
3. What is the main reason you anticipate you will ride the ferries less in the next 2 years?

Tacoma Narrows Bridge

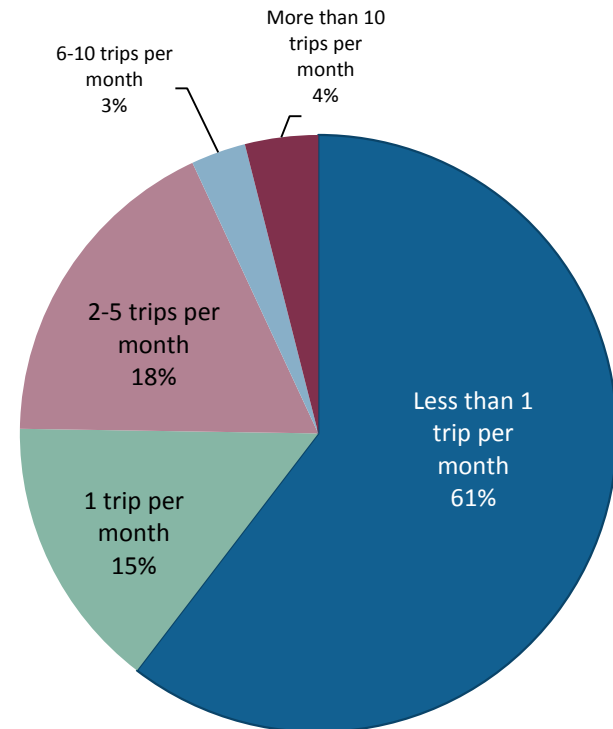


Over a quarter (26%) of ferry riders say they have taken the ferry going eastbound in conjunction with going westbound on the Tacoma Narrows bridge to make a round trip between west and east sound. Of those who have made a ferry eastbound / bridge westbound combined trip, almost two thirds (61%) say they make the trip less than once a month.

WSF + Tacoma Narrows Trip
(n=3761 Multi Response)



Tacoma Narrows Commute Frequency
(n=840)



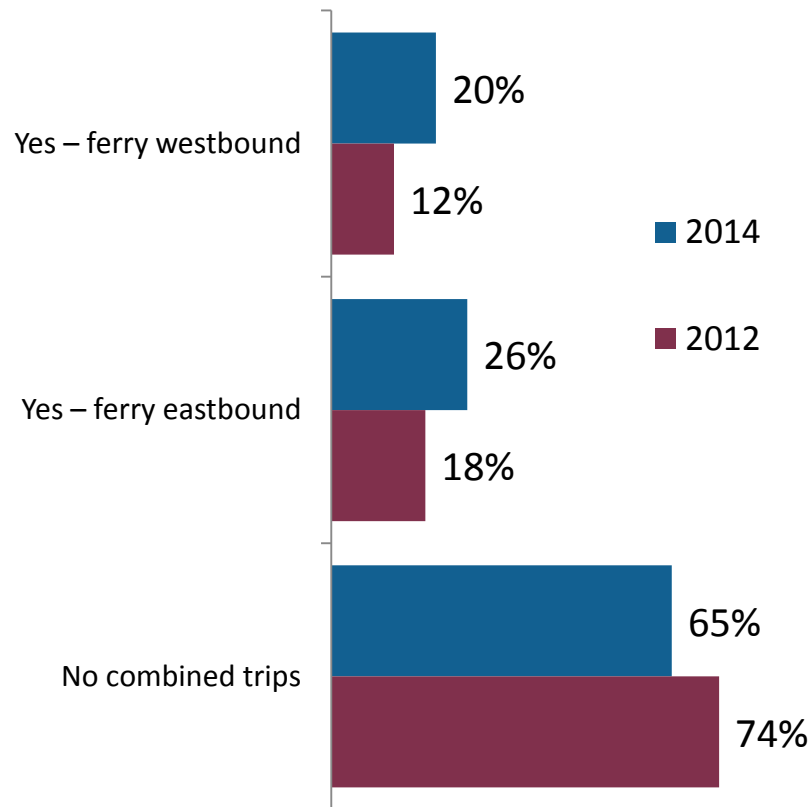
5. The following questions are about the use of ferries in conjunction with the Tacoma Narrows Bridge during the last 12 months (June 2013 through May 2014). In the last 12 months, have you used the Tacoma Narrows Bridge in conjunction with a ferry to make a round trip between the west and east Sound? **(MULTI-RESPONSE)**
6. During a typical month, how often do you make a ferry trip (going east bound) in conjunction with the Tacoma Narrows Bridge (going west bound)?

Tacoma Narrows Bridge: 2014 vs. 2012



There is a 8 percentage point increase from 2012 to 2014 in ferry riders saying they have taken a ferry eastbound in conjunction with taking the Tacoma Narrows bridge westbound to make a round trip between west and east sound.

WSF + Tacoma Narrows Trip
(n=3761 Multi-response)



Commute Frequency	2014	2012
Less than 1 trip per month	61%	50%
1 trip per month	15%	24%
2-5 trips per month	18%	23%
6-10 trips per month	3%	1%
More than ten trips per month	4%	2%

5. The following questions are about the use of ferries in conjunction with the Tacoma Narrows Bridge during the last 12 months (June 2013 through May 2014). In the last 12 months, have you used the Tacoma Narrows Bridge in conjunction with a ferry to make a round trip between the west and east Sound? **(MULTI-RESPONSE)**
6. During a typical month, how often do you make a ferry trip (going east bound) in conjunction with the Tacoma Narrows Bridge (going west bound)?

Decision to Drive-On



The top factors affecting riders' decision to drive-on instead of walking-on are all related to flexibility as in 2012.

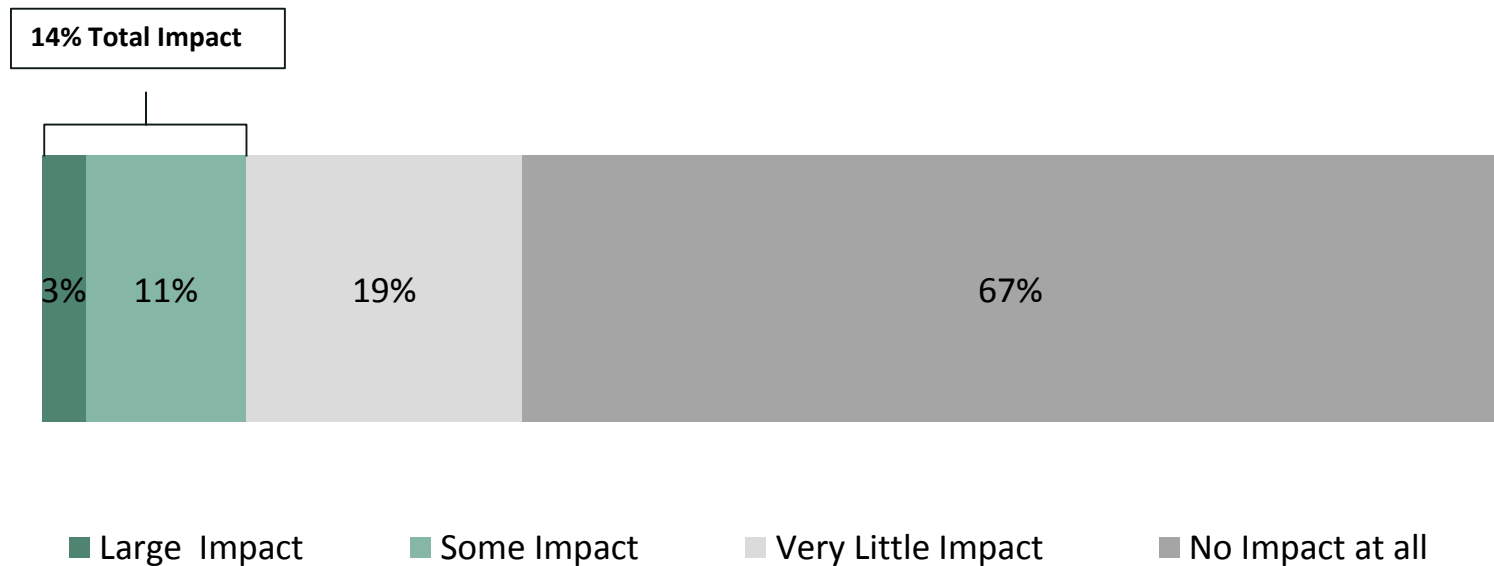
Factors Affecting Decision to Drive-On	2014	2012
Overall convenience of having a car/ability to run errands visiting/options if ferry is missed	46%	35%
Traveling with people pets equipment etc	36%	22%
Ability to travel on personal timetable	34%	28%
Lack of public transportation to desired destinations	29%	32%
Overall length of commute	14%	20%
Work requires driving to different locations	14%	31%
Access to public transportation on the destination side	13%	17%
Lack of public transportation outside of peak travel times	12%	22%
Overall cost of travel combined cost of ferry public transportation and parking	7%	-
Parking availability and cost on the destination side	7%	-
Ferry wait time/overload	7%	-
Proximity of the ferry terminal to your work	7%	17%
Flexibility in case of emergency	7%	-
Ferry cost	7%	8%
Access to public transportation on the origin side	6%	-
Weather	4%	-
Something else please specify	13%	-

7. What are the top 3 factors that most affect your decision to drive-on instead of walking on the ferry ? (Up to 3)

Impact of Land-side Travel Alternatives



Most riders (86%) say increased land side travel alternatives will have little or no impact on their decision to walk on to the ferry instead of driving. Only one in ten (14%) ferry riders say increased land side travel alternatives will largely (3%) or somewhat (11%) impact their decision.

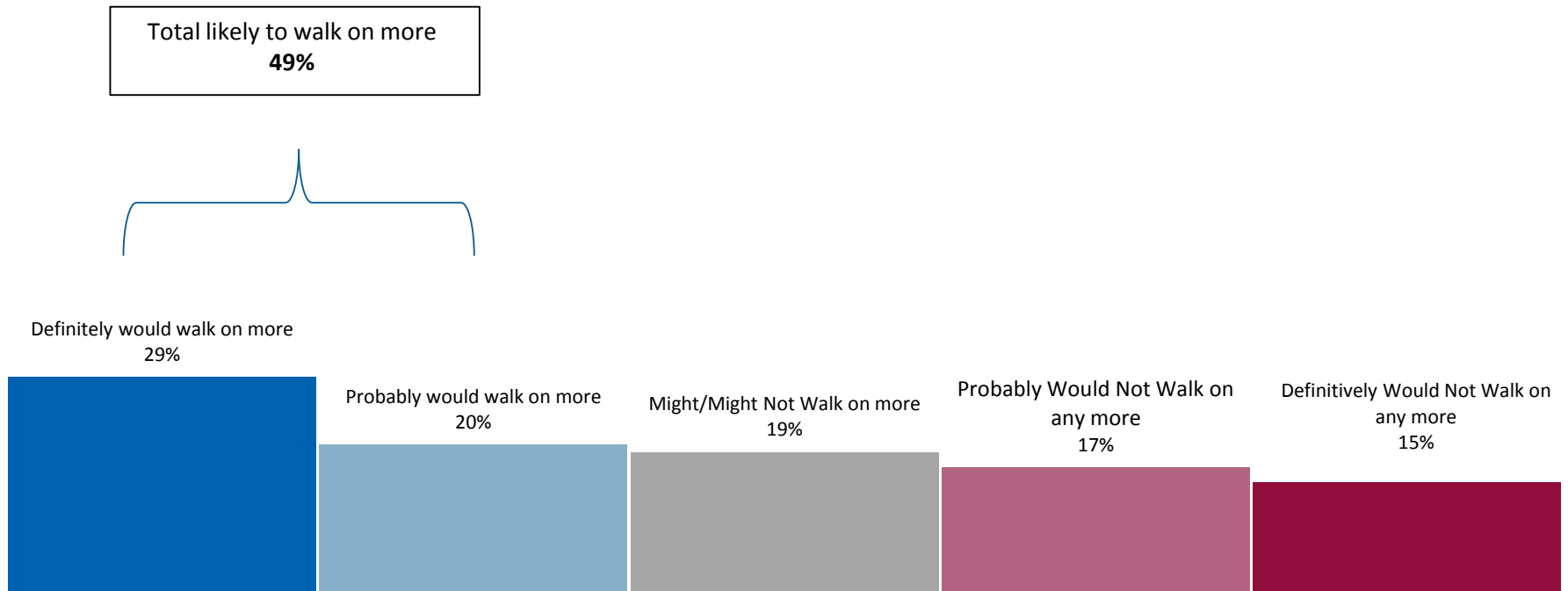


8. With increased land-side travel alternatives available in the Seattle area, such as **Uber, SmartCar, Flex Car, etc.**, do these services have an impact on your decision to walk-on the ferry instead of driving on the ferry?

Transit Service Reliability



Almost half (49%) of those who have boarded the ferry as a vehicle driver or passenger say they would definitely (29%) or probably (20%) walk on the ferry more if transit service was reliable, coordinated, and easy to use on both sides of the ferry trip.



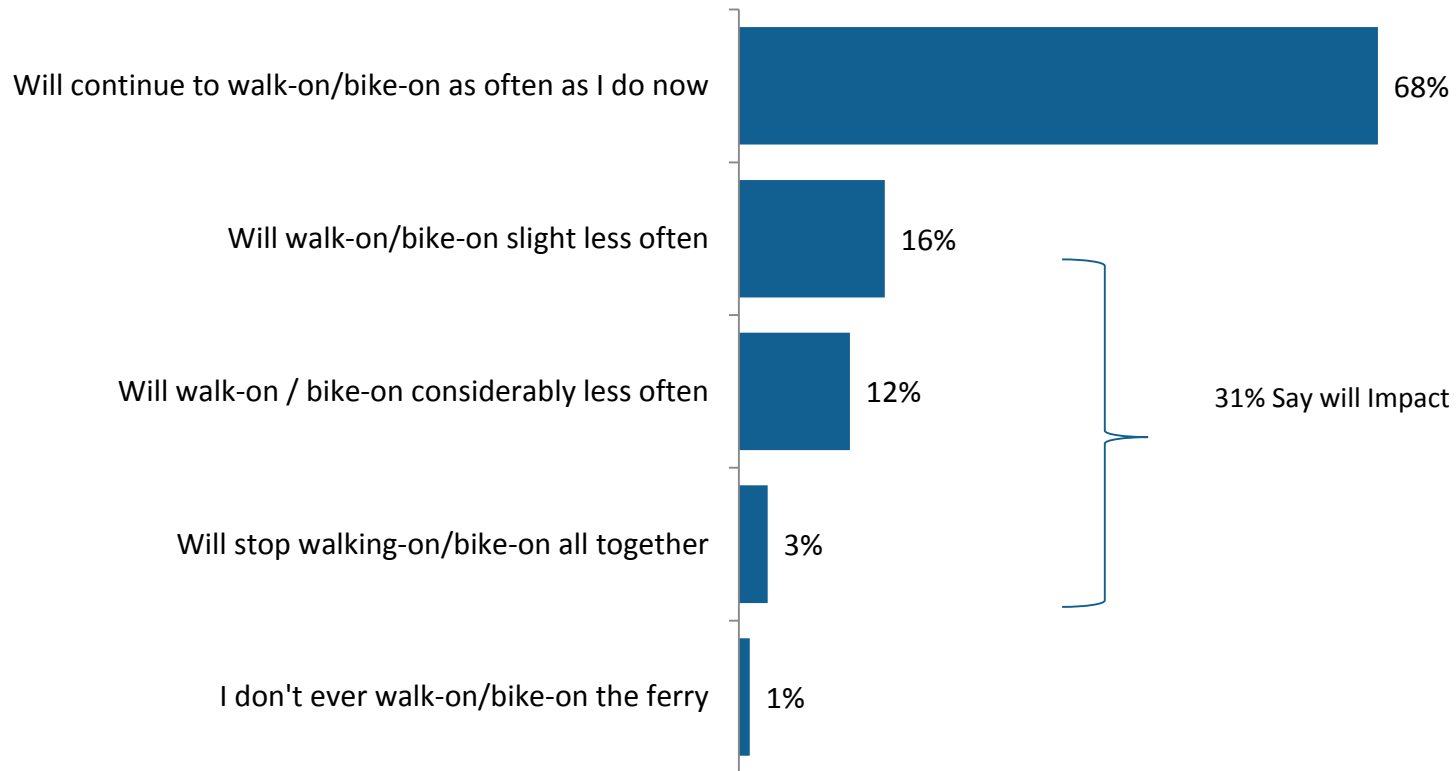
IF DRIVER OR PASSENGER ASK 9. How likely would you be to walk on more if transit service was reliable, coordinated, and easy to use on both sides of your ferry trip?

Transit Service Reductions



The majority (68%) of walk/bike on ferry riders say public transportation service reductions will not have an impact on their decision to continue to walk/bike on the ferry. Almost a third (31%) say service reductions will have some impact on their decision to walk on/bike on the ferry.

**Walk/Bike on Ferry Riders
(n=2842)**

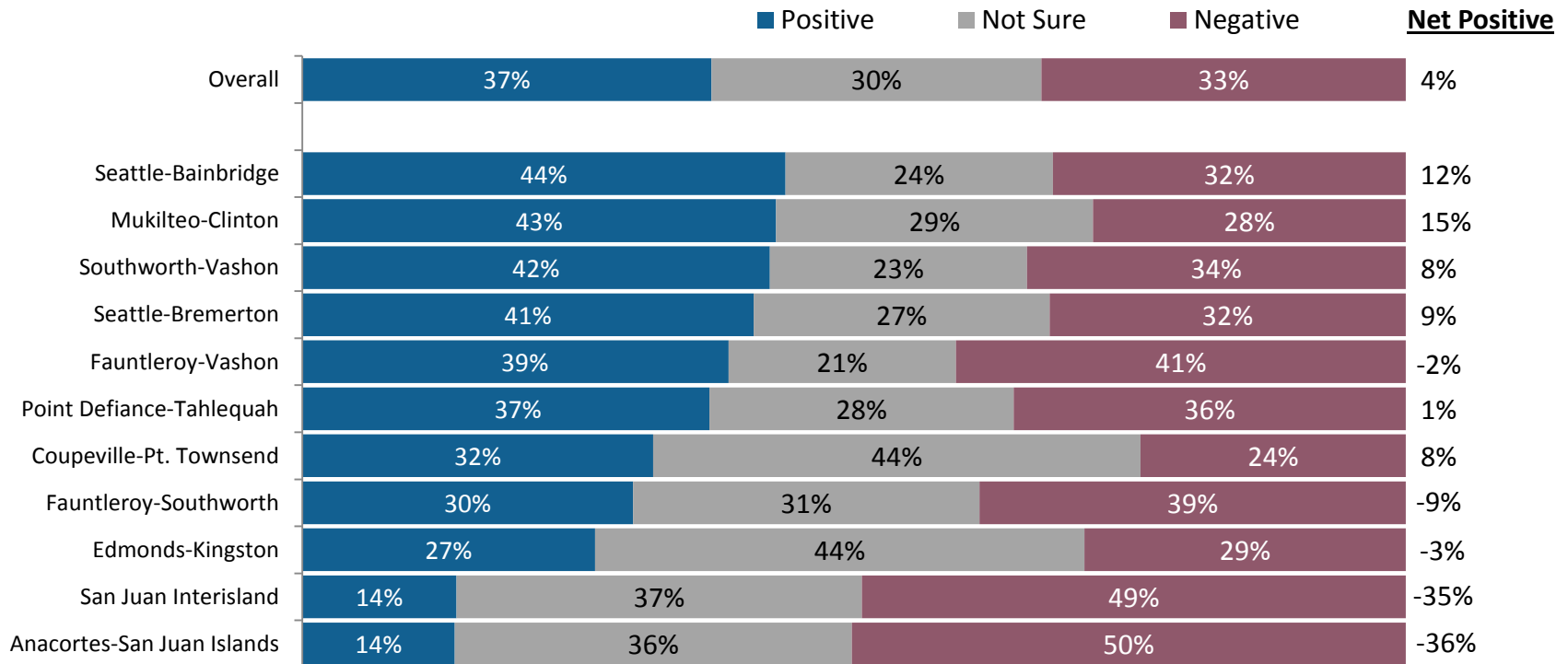


19. How will reductions in public transportation services/schedule impact your decision to continue to walk-on / bike-on the ferries, if at all?

Connectivity with Public Transit: Rating



Ferry/Public transit coordination is rated 4 percent more positive than negative overall, though no single route receives a majority positive rating. Mukilteo-Clinton receives the greatest net positive rating (+15) and Anacortes- SJI receives the weakest rating (-36).



Positive = Excellent, Very Good, Good
Negative = Very Poor, Poor, Fair

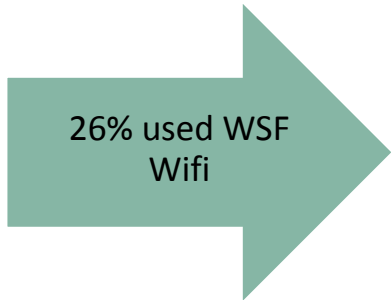
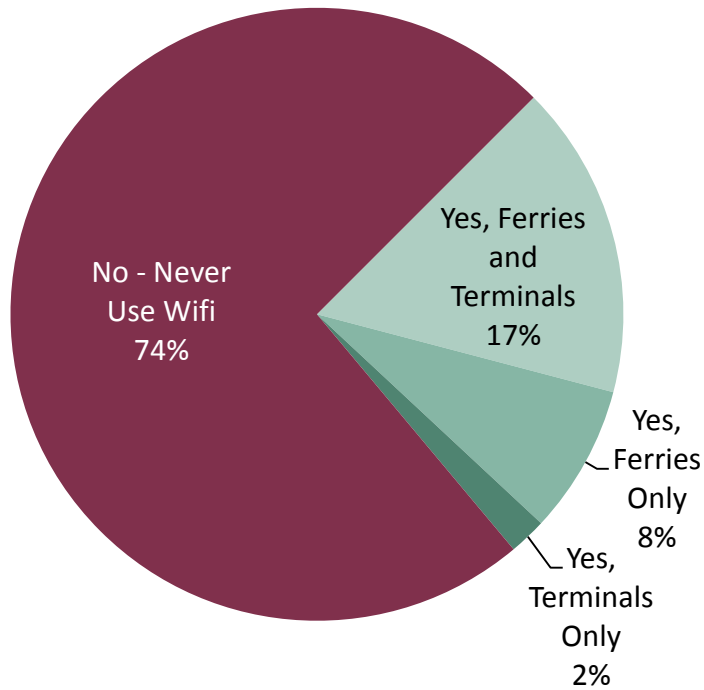
20. How would you rate the connectivity and coordination of the ferry schedule and the public transportation schedule?

WiFi Usage on Ferries and Terminals

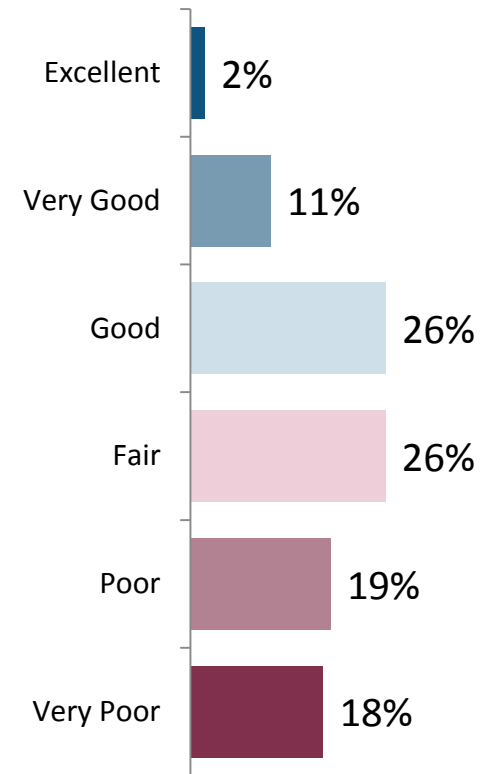


Only a quarter of ferry riders say they have used WSF Wi-Fi service and over half (63%) of all Wi-Fi users give the service a negative rating of fair, poor or very poor.

Wifi Usage
(n=3912)



Rating of Wifi on Ferries/ at Terminals
(n=1011)

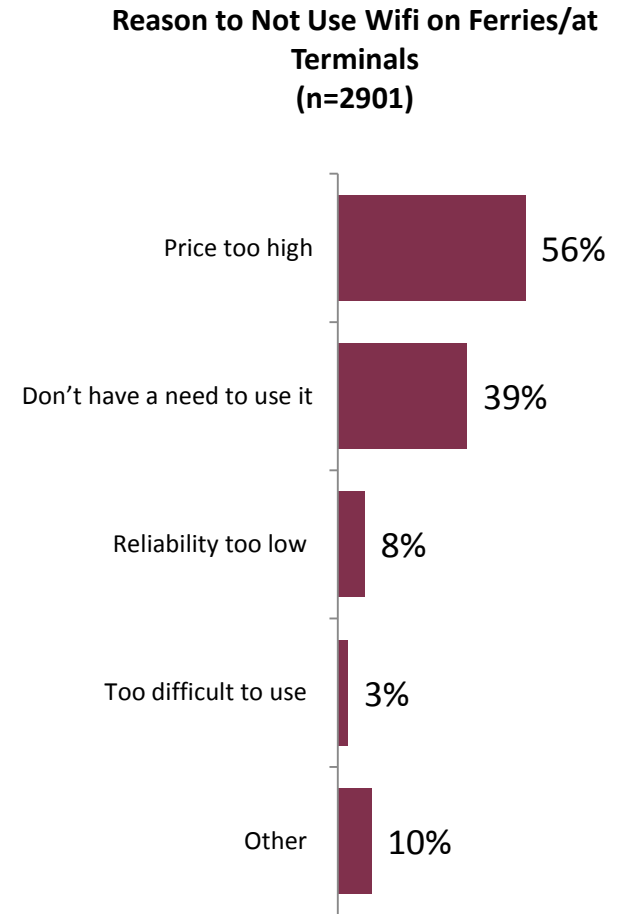
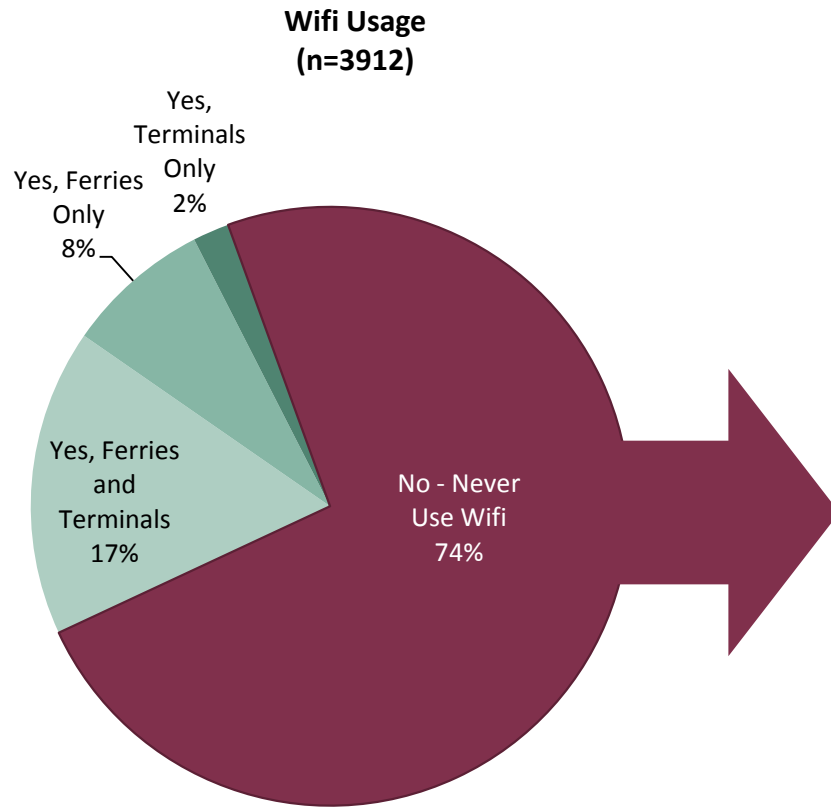


- 21. Have you ever used the WSF WiFi service at the terminals or on the ferries?
- 22. How would you rate the current WiFi service quality only (not the price) on the ferries?

WiFi Usage on Ferries and at Terminals



Three quarters (74%) of ferry riders have never used Wi-Fi and they list high prices and no need as the top reasons for not using the service.



21. Have you ever used the WSF WiFi service at the terminals or on the ferries?

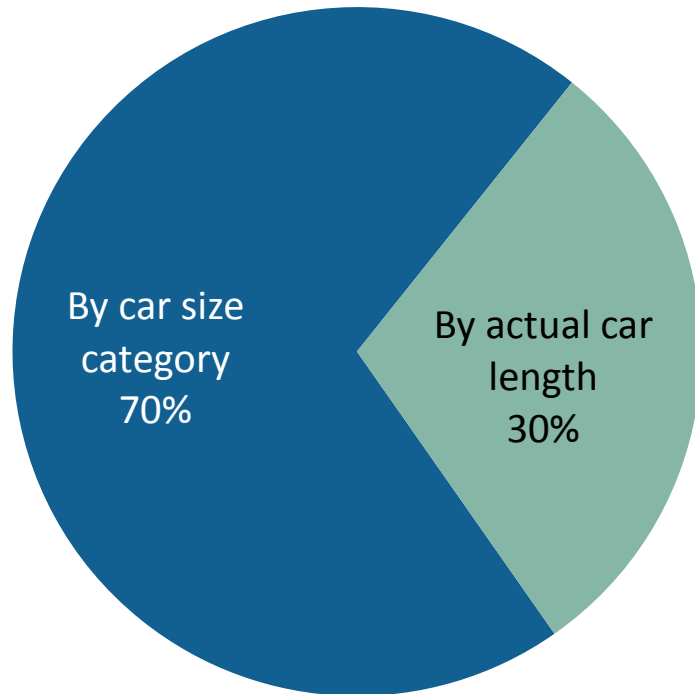
23. What are the reason(s) you don't use the WiFi on the ferries or at the terminals? (Multi-Response)

Fare Structure by Car Size

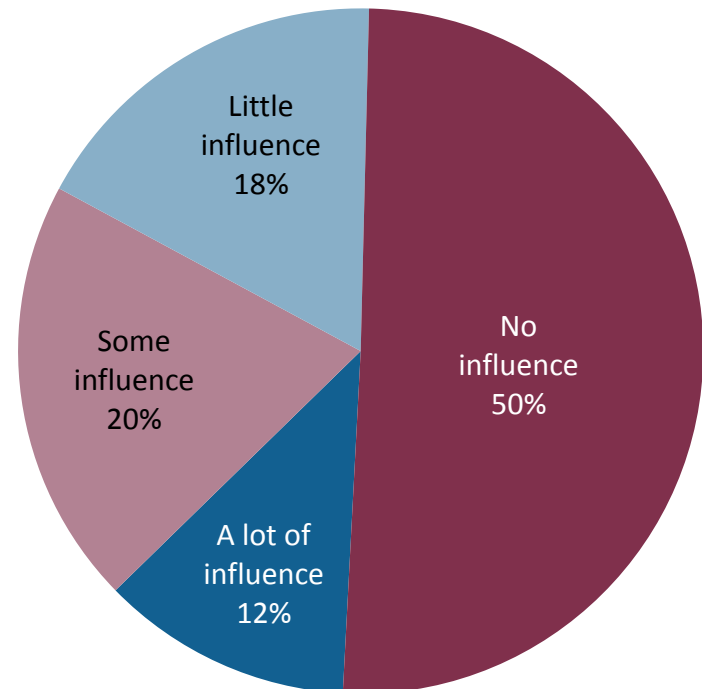


The majority (70%) of ferry riders prefer current car size categories rather than paying by the foot. A third (32%) say the under 14 feet car length discount has some or a lot of influence on their decision to purchase a car under 14 feet.

**Vehicle Fare Preference
(n=3912)**



**Fare Impact on Vehicle Purchase Decision
(n=3912)**



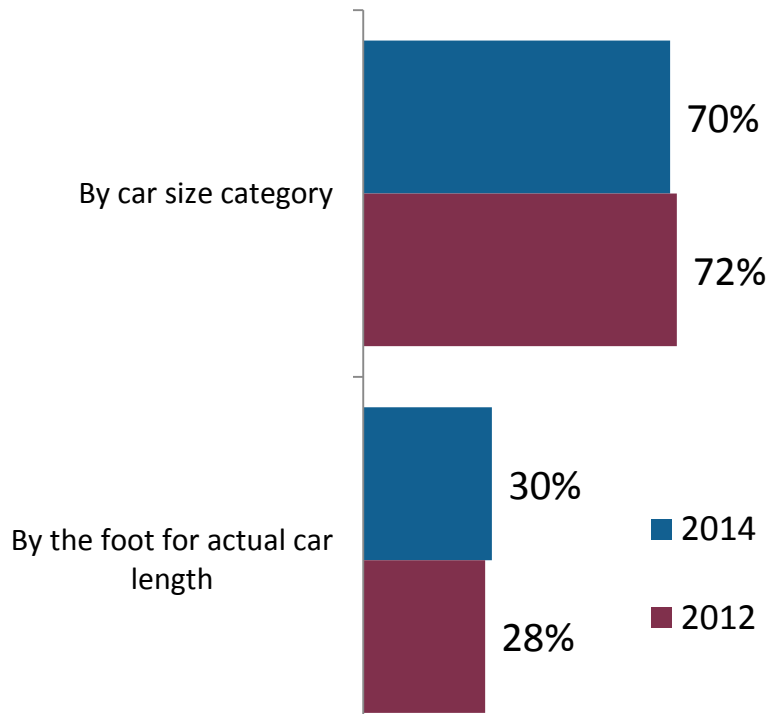
24. Now we have some questions for you about possible changes to the WSF fare structure. Would you prefer paying the vehicle fare using the current car size categories (i.e. car under 14", car 14-22', etc.) or pay by the foot (i.e. actual car length based upon a per/foot charge)?
25. Vehicles under 14 feet currently get a 30% discount off of the regular vehicle fare. How much of an influence, if at all, will this or has this discount had on your decision to purchase a small car under 14 feet?

Fare Structure by Car Size

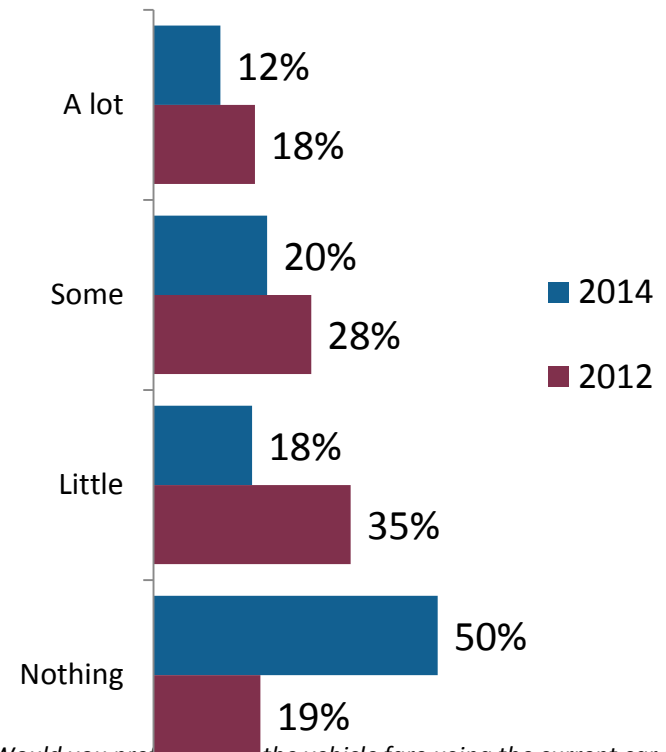


Ferry riders' vehicle fare structure preference is similar to 2012. The discount's impact on vehicle purchase decisions has a declined somewhat from 2012.

Vehicle Fare Preference



Fare Impact on Vehicle Purchase Decision

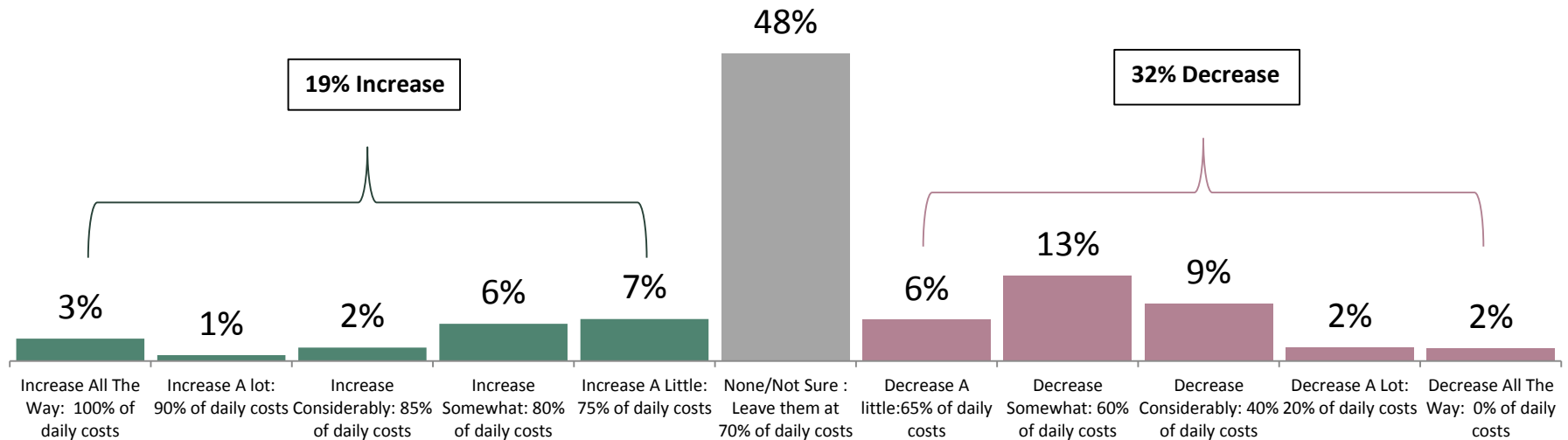


24. Now we have some questions for you about possible changes to the WSF fare structure. Would you prefer paying the vehicle fare using the current car size categories (i.e. car under 14", car 14-22', etc.) or pay by the foot (i.e. actual car length based upon a per/foot charge)?
25. Vehicles under 14 feet currently get a 30% discount off of the regular vehicle fare. How much of an influence, if at all, will this or has this discount had on your decision to purchase a small car under 14 feet?

Fare Increase for WSF Daily Costs



Almost half (48%) of ferry riders say fares should be left as is or are not sure, and a third (32%) say fares should be decreased. Only one in five (19%) ferry riders say fares should be increased to cover daily operating costs.

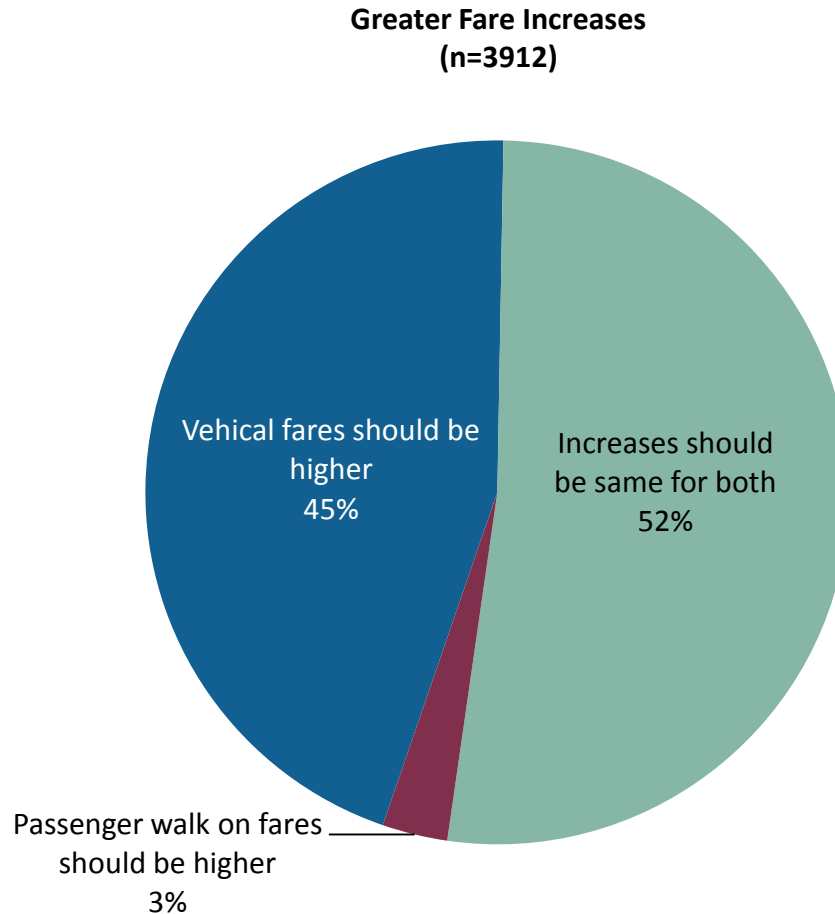


26. Currently fares cover an average of 70% of WSF's daily operational costs and statewide gas tax revenue subsidizes the remaining 30%. How much, if any, would you suggest fares be increased or decreased to cover more or less of the daily operating costs?

Vehicle vs. Passenger Fare Increases



The majority (52%) of ferry riders say fare increases should be the same for both walk on and vehicle/drivers, however a plurality (45%) agree that vehicle/driver fare increases should be higher than passenger walk on.

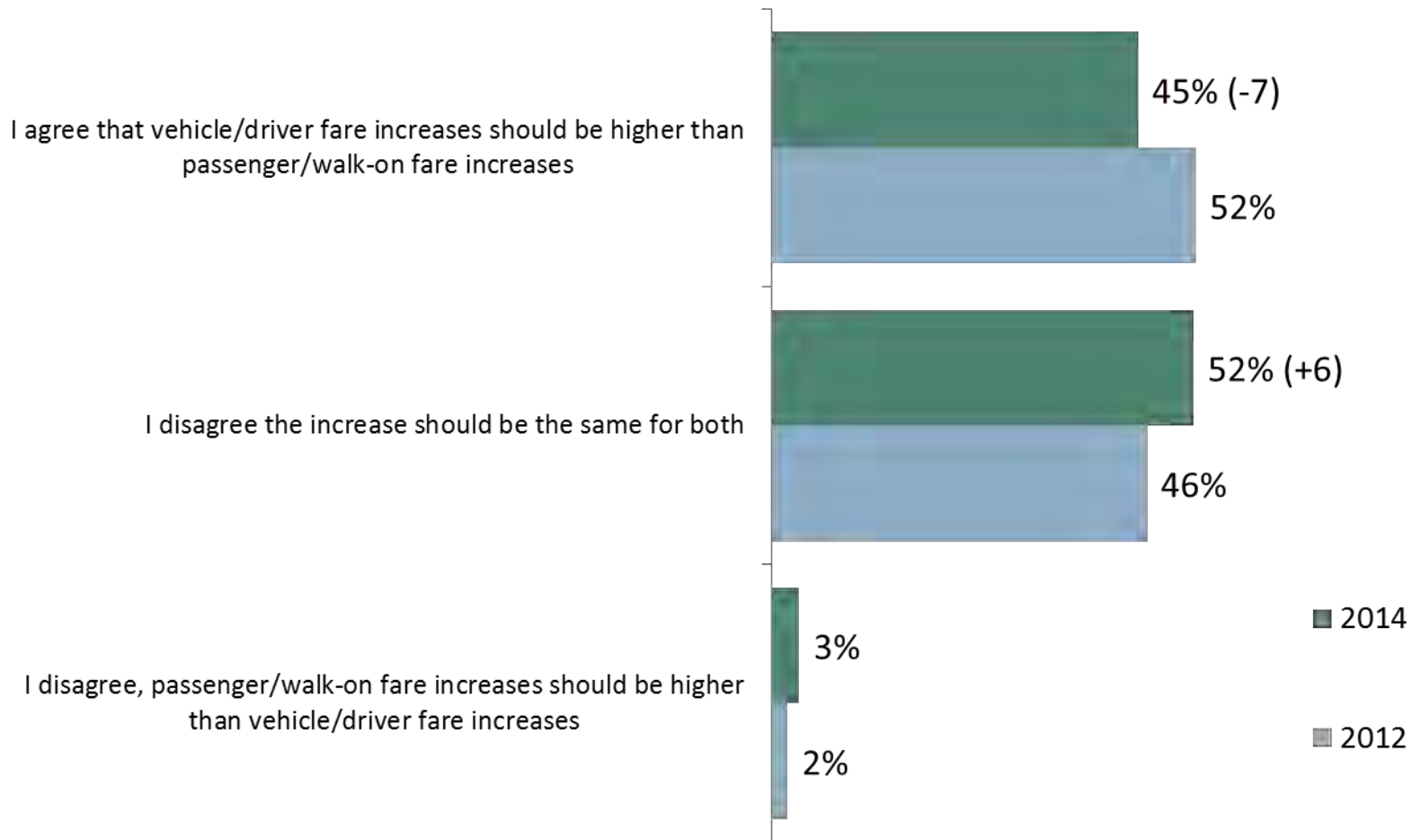


27. To encourage more walk-on usage of the ferries, how would you feel about possible fare increases being greater for vehicles than for passengers/walk-ons?

Vehicle vs. Passenger Fare Increases



Since 2012 there has been an increase of 6 points from 46% to 52% in ferry riders saying fare increases should be the same for both walk on and vehicle/drivers



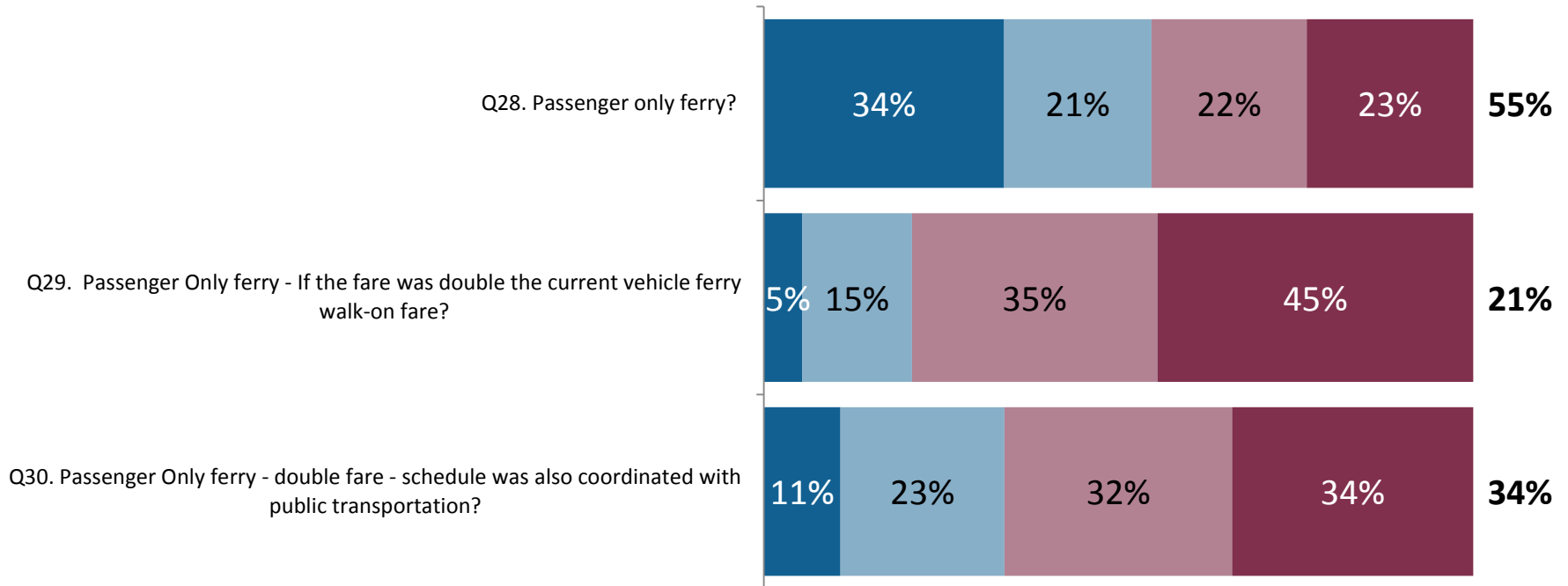
27. To encourage more walk-on usage of the ferries, how would you feel about possible fare increases being greater for vehicles than for passengers/walk-ons?

Passenger Only Ferry



Initially, a majority (55%) of ferry riders are interested in a passenger only ferry, but interest significantly decreases when asked about doubling the current vehicle ferry walk-on fare to cover the cost.

■ 10 - Very Interested
 ■ Interested (6/9)
 ■ Not Interested (2/5)
 ■ 1 - Not at all interested
 Total Interested



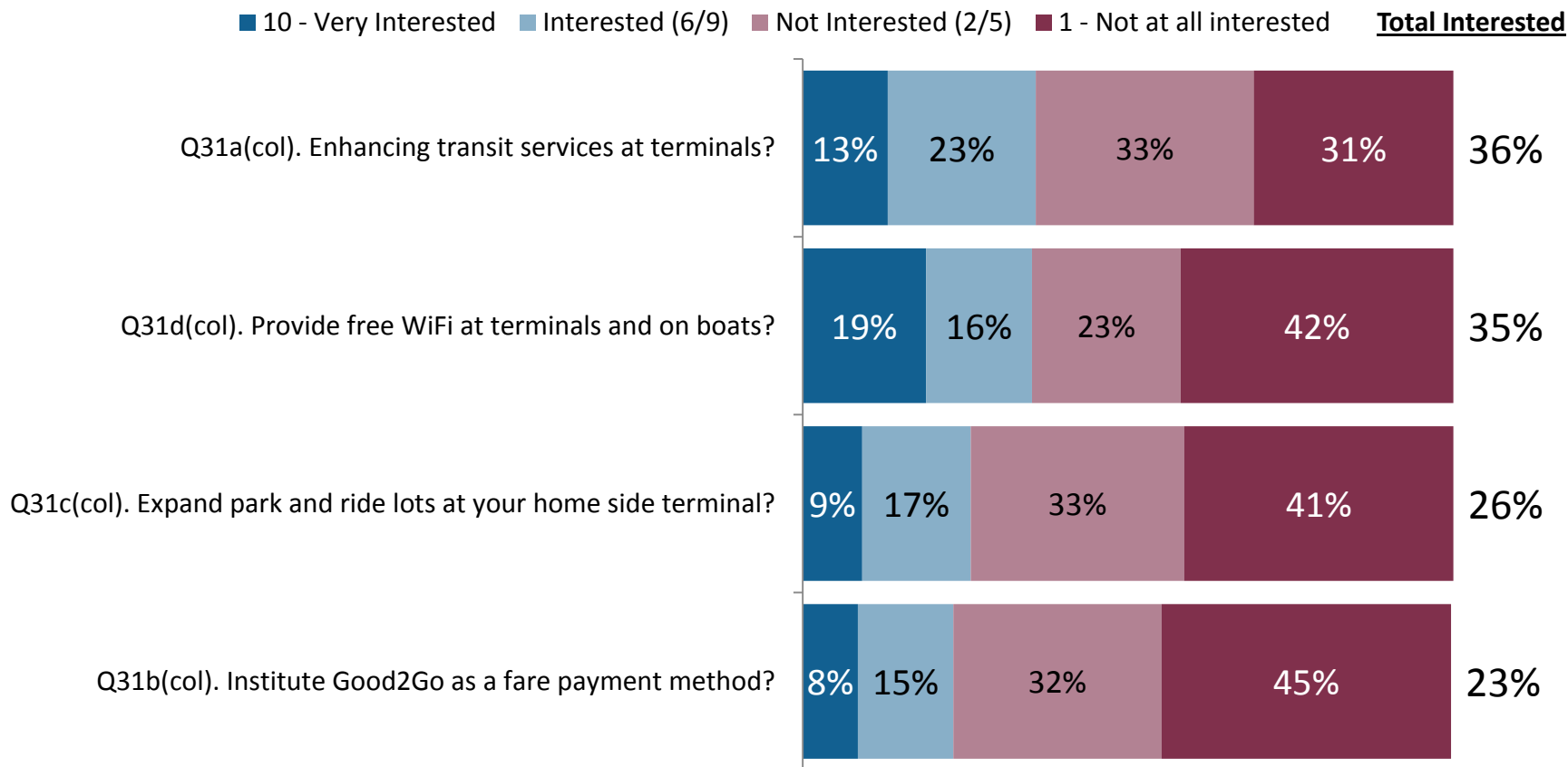
On a scale of 1 to 10 where 1 is not interested at all and 10 is very interested, how interested would you be in a...

- Passenger only ferry that ran from your current starting terminal to your destination terminal, if it was able to get you there twice as fast as a vehicle ferry?
- How interested would you be in this service if the fare was double the current vehicle ferry walk-on fare?
- Assuming the passenger only ferry could get you to your destination terminal twice as fast as the vehicle ferry but cost twice as much as a vehicle ferry walk-on fare, how interested would you be in this service if the passenger ferry schedule was also coordinated with public transportation schedules on both ends of your trip?

\$0.25 Fare Increase For New Amenities



There is minimal interest in adding any new amenities from funds generated by a \$0.25 fare increase. For a \$0.25 fare increase, just over a third (36%) say they would be interested in enhancing transit services and (35%) would be interested in providing free Wi-Fi at terminals and on ferry boats. Only a quarter (26%) of ferry riders are interested in expanding park and ride lots at home side terminals and (23%) say they are interested in instituting Good2Go as fare payment method from funds generated by a \$0.25 fare increase.



On a scale of 1 to 10 where 1 is not interested at all and 10 is very interested, how interested would you be in paying an additional \$0.25 per fare if the revenue was dedicated to: ...



Questions & Answers



THANK YOU!

For More Information Contact:

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