

Appendix C: Survey instrument and summary

Survey instrument

We want to hear from you!

The 2040 Long Range Plan will consider many challenging issues as we map out a plan to accommodate more riders with limited financial resources and an aging fleet and terminals. We want your input based on how you use the ferry system today and your ideas for the future.

1. How frequently do you use the ferry?

- Not at all (skip to Q4)
- Less than 1 day a month
- 1 to 4 days a month
- 1 to 2 days a week
- 3 to 4 days a week
- 5 or more days a week

2. For what trip purposes do you typically use the ferry? (choose all that apply)

- Travel to or from work
- Travel to or from school
- Errands/shopping
- Non-commute work-related travel
- Recreational activities
- Visit family or friends
- Medical appointments
- Other: _____ (specify)

3. Which route(s) do you use most often? (choose all that apply)

- Anacortes/ San Juan Islands / Sidney B.C.
- Port Townsend / Coupeville
- Mukilteo / Clinton
- Edmonds / Kingston
- Seattle / Bainbridge Island
- Seattle / Bremerton
- Fautleroy / Vashon
- Fautleroy / Southworth
- Southworth / Vashon
- Point Defiance / Tahlequah

4. What are the top three incentives you think would encourage people to **walk onto the ferry** rather than drive onto the ferry with their vehicle?

- a. _____
- b. _____
- c. _____

5. What are the top three incentives you think would encourage people to **ride a bike** rather than drive onto the ferry with their vehicle?

- a. _____
- b. _____
- c. _____

6. If you had to assign all the available space on a ferry to each of the following rider groups, what percentage would you allocate to each? (total must equal 100%)

- | | |
|--------------------------|-------------------------|
| Passenger vehicles _____ | Commercial trucks _____ |
| Carpools/vanpools _____ | Walk-on customers _____ |
| Bicycles _____ | Motorcycles _____ |

7. Which of the following would you rather have? (choose just one)

- A guaranteed, reserved spot on the ferry that requires you to arrive at the terminal at a specific time
- Just show up at the terminal and wait for the next boat (as long as the wait was not too long)

Washington State Ferries
2040 Long Range Plan



8. What technologies would you **most** like to see Washington State Ferries implement to make your travel easier (for example mobile ticketing, real-time schedule information, etc.)? List your top three.
- a. _____
- b. _____
- c. _____
9. If resources were available to add additional ferry service, which of the following options should Washington State Ferries prioritize? (choose just one)
- Add service to popular destinations during **peak** (busy) times
- Add service to popular destinations at **off-peak** (less busy) times to encourage customers to travel when more space is available
10. How important is it to you that your mode of transportation be carbon-neutral/emit zero greenhouse gases?
- Very unimportant Somewhat important
- Somewhat unimportant Very important
- Neither important nor unimportant
11. Is it acceptable to you to have fewer sailings available at **non-peak** (less busy) times of day **if it means that the ferry system is operating more efficiently, using less fuel, and saving money?**
- No Yes Don't know
12. Is it acceptable to have fewer sailings available at **non-peak** (less busy) times of day **if it means that there is more time to maintain our ferries and make them more reliable?**
- No Yes Don't know
13. Please select the top three amenities that are most important to you to have at the ferry terminal. (choose just three)
- | | |
|---|--|
| <input type="radio"/> Concessions and retail | <input type="radio"/> Pick-up/drop-off space |
| <input type="radio"/> Parking | <input type="radio"/> Bicycle racks |
| <input type="radio"/> Technology for easy fare collection | <input type="radio"/> Open space/community event space |
| <input type="radio"/> Transit connections | <input type="radio"/> Travel information |
| <input type="radio"/> Bikeshare | <input type="radio"/> Other: _____ (specify) |
| <input type="radio"/> Rideshare providers | |
14. If riding the ferry is not your only option – for example, you aren't traveling to and from an island – how long on average are you willing to wait in line before taking an alternate route?
- | | |
|--|---|
| <input type="radio"/> Less than 30 minutes | <input type="radio"/> 90 minutes |
| <input type="radio"/> 30 minutes | <input type="radio"/> 120 minutes |
| <input type="radio"/> 60 minutes | <input type="radio"/> More than 120 minutes |
15. As Washington State Ferries makes changes to the sailing schedule, which option is most important to you? (choose just one)
- Having the ferry leave at the scheduled time
- Keeping the same number of departures throughout the day
16. Washington State Ferries is part of the state highway system and most of its funding comes from fares and state taxpayer dollars. Given financial constraints, if it were up to you, what percentage of WSF's budget would you allocate to each of the following? (total must equal 100 percent).
- | | |
|------------------------------------|---|
| Vessel maintenance _____ | Customer service _____ |
| Management/Administration _____ | Technology _____ |
| Building new ferries _____ | Ferry operations (labor, fuel, etc) _____ |
| Building/upgrading terminals _____ | |

Washington State Ferries 2040 Long Range Plan





Washington State Ferries 2040 Long Range Plan

Spring 2018 survey results

June 2018

Purpose and Methods

Washington State Ferries (WSF) hosted nine in-person open houses, outreach sessions on the ferry, and an online open house in spring 2018 to introduce the Long Range Plan and gather input on community priorities. Attendees were invited to meet with project staff, ask questions, and provide early input about priorities and issues to be addressed in the plan. Participants were encouraged to drop-in at any time during the open house to learn about the plan and provide input; there was no formal presentation.

Participants received a paper version of the survey when they arrived at the open house and copies of the survey were available at the comment table. The online version of the survey was available via computers at the comment table, as well as on the online open house webpage from April 11 to May 24.

A total of **869** people completed the survey.

Key Findings

Overall, survey participants expressed support for maintaining reliable, convenient, and frequent ferry service.

Service reliability

- More than half of survey respondents (54%) accept fewer sailings at non-peak times of the day if it means there is more time to maintain ferries and make them more reliable. The survey results indicated people are more willing to accept less frequent service if it means boats are better maintained, and therefore more reliable, than less frequent service to save fuel and operate more efficiently.
- When asked to rank priorities for budget purposes, respondents allocated the most funding to ferry operations (28%), vessel maintenance (25%), and building new ferries (21%).

Planning for growth

- Participants are evenly split between preferring a guaranteed, reserved spot at a scheduled time, and showing up at the terminal for the next available ferry. Frequent ferry users and Central and South region users are more likely to prefer showing up at the terminal and waiting for the next boat.
- Respondents said WSF should allocate almost half of the space on ferries for passenger vehicles. Frequent users and North and South region users allocated more space for passenger vehicles while Central region users allocated more space for walk-on passengers.
- Respondents, especially frequent ferry users, prefer adding service during peak times over encouraging customers to travel when more space is available.
- Survey respondents strongly prefer a sailing schedule where ferries leave at scheduled times (i.e. schedule reliability) over keeping the same number of departures throughout the day.
- When asked what incentives would be most likely to encourage ferry customers to walk on a ferry rather than drive, the top three responses included better access to public transportation near the ferry terminal; free, affordable and available parking near the terminal; and free or discounted fares for walk-on passengers.

Customer experience and technology

- When asked about investment in technology, respondents prioritized real-time schedule information, mobile ticketing, and improved wi-fi connections.
- Parking, transit connections, and ticket technology are the most important terminal amenities to survey participants.

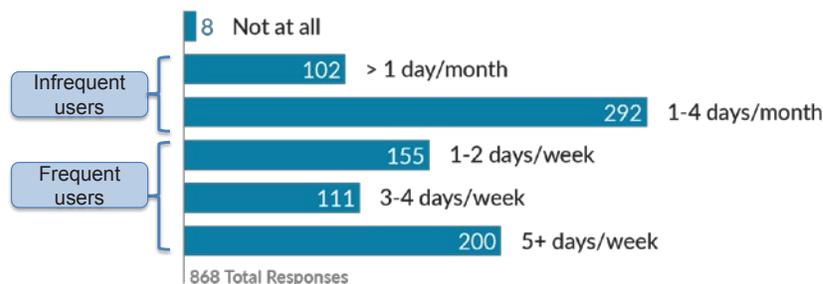
Sustainability

- Slightly more than half of respondents think ferries operating carbon-neutral/ emitting zero greenhouse gases is important.
- 40 percent of respondents said it was acceptable to reduce service at non-peak times even if it means the ferry system operates more efficiently, uses less fuel, and saves money.



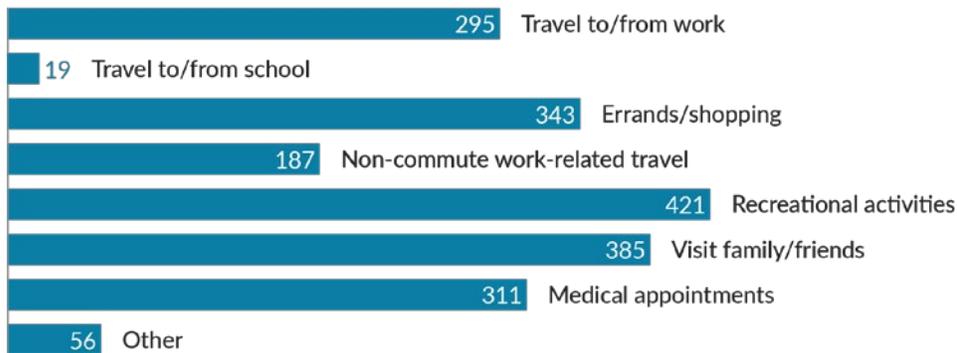
1. How frequently do you use the ferry?

- Respondents are almost equally split between infrequent users (45%) and frequent users (54%).
- Almost a quarter of respondents (23%) use the ferries five or more days a week.



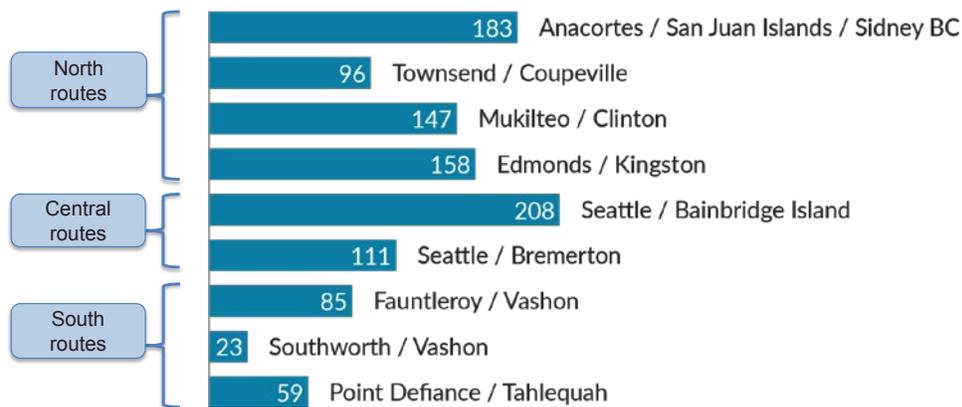
2. For what trip purposes do you typically use the ferry? (choose all that apply)

- Respondents mentioned the following trip purposes most:
 - Recreational activities – 58%
 - Visit family and friends – 53%
 - Errands/shopping – 47%
 - Medical appointments – 43%
 - Travel to or from work – 40%



3. Which route(s) do you use most often? (choose all that apply)

- Respondents use the following routes most often:
 - Seattle/Bainbridge island – 29%
 - Anacortes/San Juan Islands/Sidney B.C. – 25%
 - Edmonds/Kingston – 22%
 - Mukilteo/Clinton – 20%



4. What are the top three incentives you think would encourage people to walk onto the ferry rather than drive onto the ferry with their vehicle?

- The top three responses for this open-ended question include:
 1. Access to public transportation near the ferry terminal.
 2. Free, affordable, and available parking near ferry terminal (or shuttles to park and rides).
 3. Free or discounted fares for walk-on passengers.



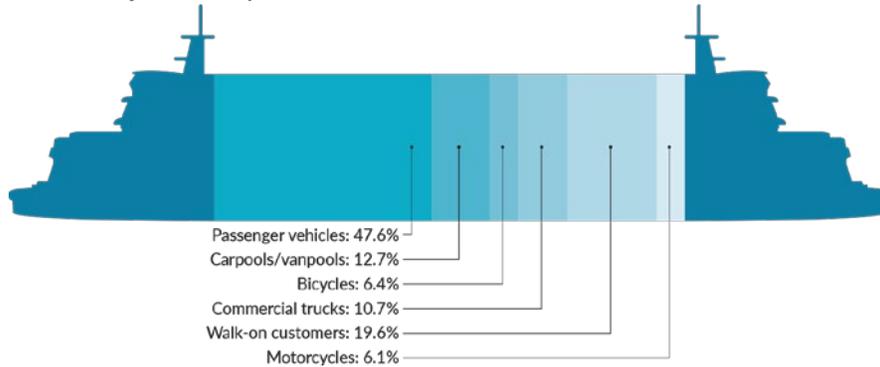
5. What are the top three incentives you think would encourage people to ride a bike rather than drive onto the ferry with their vehicle?

- The top three responses for this open-ended question include:
 1. Lower fares for bicycle passengers and increased costs for car drivers.
 2. Bike lanes near ferry terminals.
 3. Secure parking on ferries and bike parking near ferry terminals.

*A large portion of people indicated that they did not care about increasing bike usage and do not regularly bike.



6. If you had to assign all the available space on a ferry to each of the following rider groups, what percentage would you allocate to each? (total must equal 100%)



- The largest recommended ferry space allocations are:
 - Passenger vehicles – 48%
 - Walk-on customers – 20%
- Frequent users and North and South region users allocated more space for passenger vehicles.
- Central region users allocated more space for walk-on customers.

Averages = more than 100% due to rounding



7. Which of the following would you rather have?

- Preferences are equally split between:
 - Guaranteed, reserved spots that require showing up at a specific time – 51%
 - Showing up at the terminal and waiting for the next available boat – 49%
- Frequent ferry users and Central and South region users are more likely to prefer to show up at the terminal and wait for the next boat (as long as the wait is not too long).



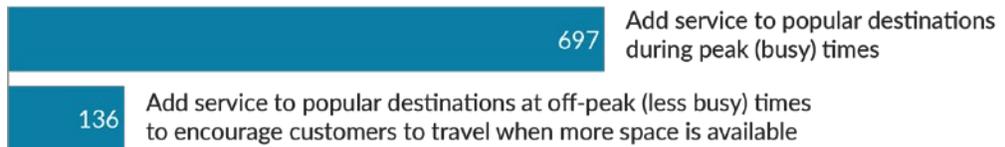
8. What technologies would you most like to see WSF implement to make your travel easier (for example mobile ticketing, real-time schedule information, etc.)? (List your top three.)

- The top three responses for this open-ended question include:
 1. Real-time schedules updated and available online, at the terminal, and via text message.
 2. Mobile ticketing and *Good To Go!* passes.
 3. Improved wi-fi on ferries.



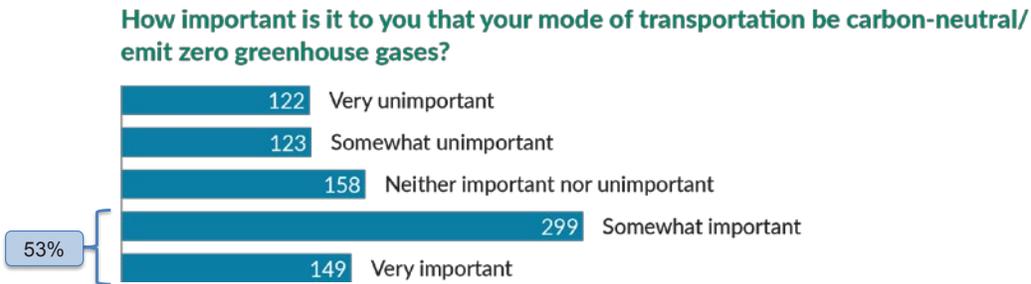
9. If resources were available to add additional ferry service, which of the following options should Washington State Ferries prioritize?

- Respondents strongly prefer adding service to popular destinations during peak times – 84%.



10. How important is it to you that your mode of transportation be carbon-neutral/emit zero greenhouse gases?

- More than half of respondents (53%) think that their mode of transportation being carbon-neutral/emit zero greenhouse gases is either *somewhat important* (35%) or *very important* (18%).



11. Is it acceptable to you to have fewer sailings available at non-peak (less busy) times of day if it means that the ferry system is operating more efficiently, using less fuel, and saving money?

- Opinions are almost equally split between:
 - Not accepting fewer sailings at non-peak times if it means the ferry system operates more efficiently, uses less fuel, and saves money – 45%.
 - Accepting fewer sailings at non-peak times if it means the ferry system operates more efficiently, uses less fuel, and saves money – 40%.
- Infrequent ferry users are more likely to feel it is acceptable to have fewer sailings at non-peak times if it means the ferry system operates more efficiently, uses less fuel, and saves money.



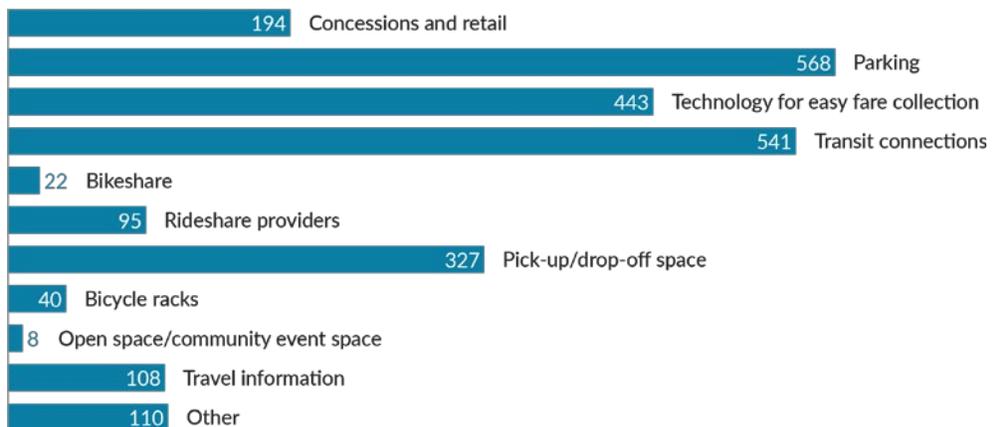
12. Is it acceptable to have fewer sailings available at non-peak (less busy) times of day if it means that there is more time to maintain our ferries and make them more reliable?

- More than half of respondents (54%) would accept fewer sailings at non-peak times of the day if it means there is more time to maintain ferry vessels and make them more reliable.
- Infrequent ferry users are more likely to feel it is acceptable to have fewer sailings at non-peak times if it means that there is more time to maintain the ferries and make them more reliable.



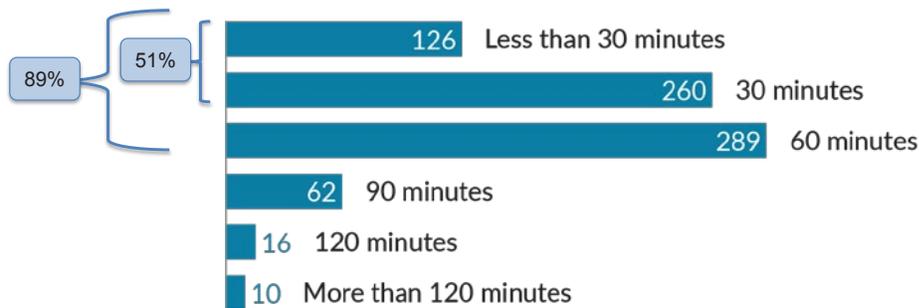
13. Please select the top three amenities that are most important to you to have at the ferry terminal. (choose just three)

- The top three preferred ferry terminal amenities are:
 - Parking – 67%
 - Transit connections – 64%
 - Technology for easy fare collection – 52%
- Concessions and retail are more important to North and Central region users.
- Parking is more important to North and South region users.
- Technology for easy fare collection is more important to Central and South region users.
- Travel information is more important to South region users.



14. If riding the ferry is not your only option – for example, you aren’t traveling to and from an island – how long, on average, are you willing to wait in line before taking an alternate route?

- The vast majority (89%) are willing to wait one hour or less for the next ferry, with half (51%) willing to wait only a half hour or less before taking an alternate route.



- North region users are more likely to be willing to wait in line longer before taking an alternate route.



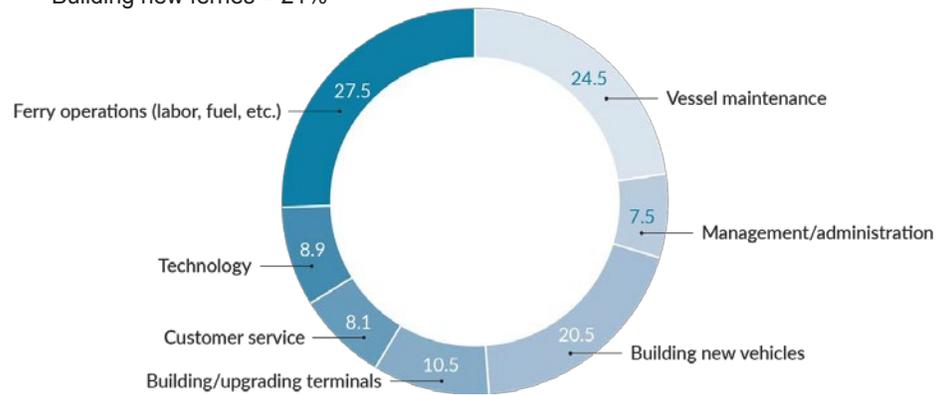
15. As Washington State Ferries makes changes to the sailing schedule, which option is most important to you?

- Respondents prefer (60%) having ferries leave at scheduled times over keeping the same number of departures throughout the day.
- Infrequent users and North and Central region users are more likely to prefer having ferries leave at scheduled times than South region users.



16. Washington State Ferries is part of the state highway system and most of its funding comes from fares and state taxpayer dollars. Given financial constraints, if it were up to you, what percentage of WSF's budget would you allocate to each of the following? (total must equal 100 percent)

- The largest recommended budget allocations are:
 - Ferry operations – 28%
 - Vessel maintenance – 25%
 - Building new ferries – 21%



Averages = more than 100% due to rounding

