



*Prepared for:*  
**Washington State  
Transportation Commission**



# **2008 Ferry Customer Survey**

## **Technical Paper #5: Attitudes toward Proposed Operational Strategies**

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# Preface

The 2007 Legislation described four key operational strategies that could be used to minimize or defer capital expenditures and that would require customer input: (a) the feasibility of using reservation systems; (b) methods of shifting vehicular traffic to other modes of transportation; (b) methods of improving on-dock operations to maximize efficiency and minimize operating and capital costs; (c) options for leveling peak vehicle demand; and (d) options for increasing off-peak ridership.

Questions were developed for the on-board surveys with input from WSF as they moved through their internal planning for changes / improvements to their operations. Questions were included in the March On-Board Survey that looked at the following operational issues:

1. Attitudes toward preferred vehicle and high-occupancy toll (HOT) lanes at ferry terminals;
2. Attitudes toward operational strategies regarding fare collections to move passengers more efficiently;
3. Attitudes toward strategies to encourage use of alternative modes;
4. Attitudes toward strategies to improve passenger access;
5. Attitudes toward improvements to the provision of real-time customer information; and
6. Attitudes toward where WSF should focus its improvement efforts – moving people versus moving vehicles.

Questions were included in the March and July / August On-Board survey to test rider attitudes toward different aspects of a reservation system and their willingness to pay to get a guaranteed space on the ferry at a specified sailing time. This analysis was conducted after a prototype vehicular reservations system was launched on the Port Townsend / Keystone route in the months before the summer data collection period.

Each major section begins with a brief summary of the key findings and as appropriate implications for policy based on these findings. Detailed analysis then follows. All key findings are analyzed for the following key segments:

1. Season of travel (when questions were asked in both survey waves);
2. Boarding mode for sampled trip;
3. Route used for sampled trip; and
4. Day of week and time of travel for sampled trip (overall and when appropriate by boarding mode).

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# Key Findings – Attitudes toward a Vehicle Reservation System and Other Vehicle Boarding Options

## Summary – Vehicle Reservation System and Other Vehicle Boarding Options

### Vehicle Reservations

#### *Attitudes toward Proposed Vehicle Reservation Policies*

Questions were included to measure rider attitudes toward proposed vehicle reservation policies and their willingness to pay a premium for a guaranteed space on the ferry for a specific sailing time. Some questions were asked in both survey waves. New questions were added in the summer to test ideas that arose during subsequent discussions.

Riders clearly have opinions about how a reservation system should be structured. They agree that . . .

- The system should be dynamic and be able to inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve -- 70 percent of all riders agree that this is an important component of the system.
- There should be a policy that penalizes those that do not arrive on time – specifically that their space would be released for general boarding and they would forfeit their reserved space and payment. Two-thirds (66%) of all riders agree with this policy.
- The system would offer a feature that would allow frequent users to be able to book a full week's travel with a single visit. Over half (56%) of summer riders agree that the system should allow frequent users to be able to book a full week's travel with a single visit. This question was asked in the summer survey only and replaced the original proposal to give frequent users priority when booking reservations. Only 46 percent of winter riders agreed with that policy; 32 percent disagreed.

On the other hand, they have mixed opinions as to whether . . .

- The system should be used only on those routes with high recreational / tourist traffic. While two out of five (40%) riders agree with this policy, one-third (33%) disagrees.
- The amount of space that is set aside for reservations should be limited. Forty-six percent (46%) of all riders agree with this proposal; 35

percent disagrees. Opinions vary significantly by route. Riders on the primarily recreational routes – Port Townsend / Keystone and the two Anacortes routes – are more likely to agree with this proposal. In addition, summer riders are more likely than winter riders to agree with this policy – 53 percent compared with 38 percent, respectively – suggesting that summer riders would like to retain the ability for some ability to take a spontaneous, unplanned trip.

- Those using the reservation system should pay a premium fare. Forty-six percent (46%) of all riders agree there should be a premium fare; 36 percent disagrees. Those that disagree with this proposal do so strongly – 27 percent “strongly disagrees” and 10 percent “somewhat disagrees.” Summer riders are significantly more likely than winter riders to “strongly disagree” – 31 percent compared to 21 percent, respectively.

### ***Willingness to Pay a Premium over the Current Average Fare for the Route for a Reservation System***

Respondents in both the winter and summer surveys were asked their willingness to pay a premium for a reservation ranging from 10 percent over the average fare paid on the route they were using to double the average fare.

More than one out of four (27%) riders are **not** willing to pay any level of a premium for a reservation – that is, they said “not at all willing” to all five of the willingness to pay questions. This is noteworthy for summer riders – 32 percent of whom are unwilling to pay any level of a premium for a reservation compared to 20 percent of winter riders.

- On the other hand, more than two out of five (43%) riders suggest they are willing to pay some premium level for a guaranteed space on the ferry at a specific time – that is, they said they were “somewhat” or “very willing” to pay at least one of the premium levels that ranged from 10 to 100 percent of the current average fare for the route they ride..

More than half (52%) of all riders (winter and summer) are willing to pay a premium of 10 percent – 40 percent is “very willing” and 12 percent is “somewhat willing.”

- The premium amount that would appear to be “reasonable,” based on an equal percentage of riders saying they would be “very willing” versus “unwilling” to pay a premium is slightly higher than 10 percent, providing further support to riders’ willingness to pay some premium over what they currently pay.
- On the other hand, the amount that would appear to be “unreasonable,” based on an equal percentage of riders saying they would be “willing” versus “unwilling” willing to pay a premium is 20 percent.

## **Preferred Vehicle Lanes**

### ***Attitudes toward a Preferred Vehicle Lane***

Winter riders’ attitudes toward a preferred vehicle lane strategy – defined as “a vehicle ‘ lane that would allow some riders with a specific pass or ticket to move more quickly through the ticketing and loading process” – are generally neutral to negatively leaning.

- For all statements describing the system, those that disagree with the strategy do so strongly – that is, two to three times as many riders “strongly disagree” as “somewhat disagree.”

- One item of note is that winter riders are somewhat more likely to agree that a preferred boarding lane would give them faster access to the vehicle waiting / loading area rather than give them priority to board regardless of when they arrive. That is, they appear to see it as a means for regular riders with pre-paid fares or those that pay to move more quickly through the vehicle queuing process, rather than as a system that would allow regular riders or those willing to pay the ability to jump the queue and board ahead of those who have been waiting.

### ***Willingness to Pay a Premium over the Current Average Fare for the Route to Use a Preferred Vehicle Lane***

Winter riders' willingness to pay a premium to use a preferred vehicle closely parallels their willingness to pay a premium for a reservation system.

- Less than one out of four (23%) winter riders are **not** willing to pay any level of premium for a preferred vehicle lane – that is, they said they are “not at all willing” to pay any of five premium levels over the current average vehicle fare for the route they ride.
- On the other hand, more than two out of five (46%) winter riders are willing to pay some level of premium – that is, they said they were “somewhat” or “very willing” to pay at least one of the premium levels that ranged from 10 to 100 percent of the current average fare for the route they ride.

The amount of a premium that winter riders suggest they are willing to pay is slightly higher than that provided for the vehicle reservation system.

- The premium amount for a preferred vehicle lane that would be “reasonable” is identified as the intersection point at which an equal percentage of winter riders suggests that they are “very willing” versus “not willing” to pay a premium. This amount is approximately halfway between a 10 and 20 percent premium over the average fare. The amount for a reservation premium is only slightly higher than 10 percent.
- The point at which an equal percentage of winter riders suggest would be “unreasonable” is the point at which an equal percentage of winter riders say they are “willing” versus “not willing” to pay a premium fare. That point is slightly over 20 percent. The amount for a reservation premium is exactly 20 percent.

### **High Occupancy Toll Lanes**

In the winter survey, respondents were asked to provide feedback on a High Occupancy Toll (HOT) lane. These were described as a program in which only vehicles with two or more persons would be allowed to board at the posted fares during peak travel periods. Single occupant vehicles would have to pay a premium fare to board during these peak periods.

WSF winter riders clearly have very negative attitudes toward the idea of a high-occupancy vehicle lane.

- Over half (56%) of all winter riders disagree with this proposal; 45 percent disagrees. Three out of five (60%) winter vehicle drivers who drive on during peak weekday hours “strongly disagree” with this proposal.

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## Detailed Findings: Attitudes toward a Reservation System

Respondents were asked the extent to which they agree or disagree with eight statements describing key aspects of a reservation system. Some questions were asked in both survey waves. New questions were added in the summer to test ideas that arose during subsequent discussions.

The following four policies being considered were tested in both the winter and summer periods:

1. **Use It or Lose It:** If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.
2. **Premium Fare:** Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.
3. **Limit Amount of Reservation Space:** A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.
4. **Limit Reservation System to Recreation / Tourist Routes:** Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.

One proposal – to give regular riders with a monthly pass a priority when making a reservation – was tested in the winter survey only. It was not tested in the summer as the WSF Operational Strategies team determined that this proposal would be neither feasible nor equitable. Instead, three additional proposals were tested in the summer survey period. These include:

1. **System Would be Dynamic:** The reservation system would inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first served.
2. **Frequent Users Can Reserve in Bulk:** Frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system. This proposal, in essence replaces the proposal tested in the winter to give regular riders with a monthly pass a priority.
3. **Limit Amount of Advance Reservation Space:** Some space should be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.

## Use It or Lose It Policy

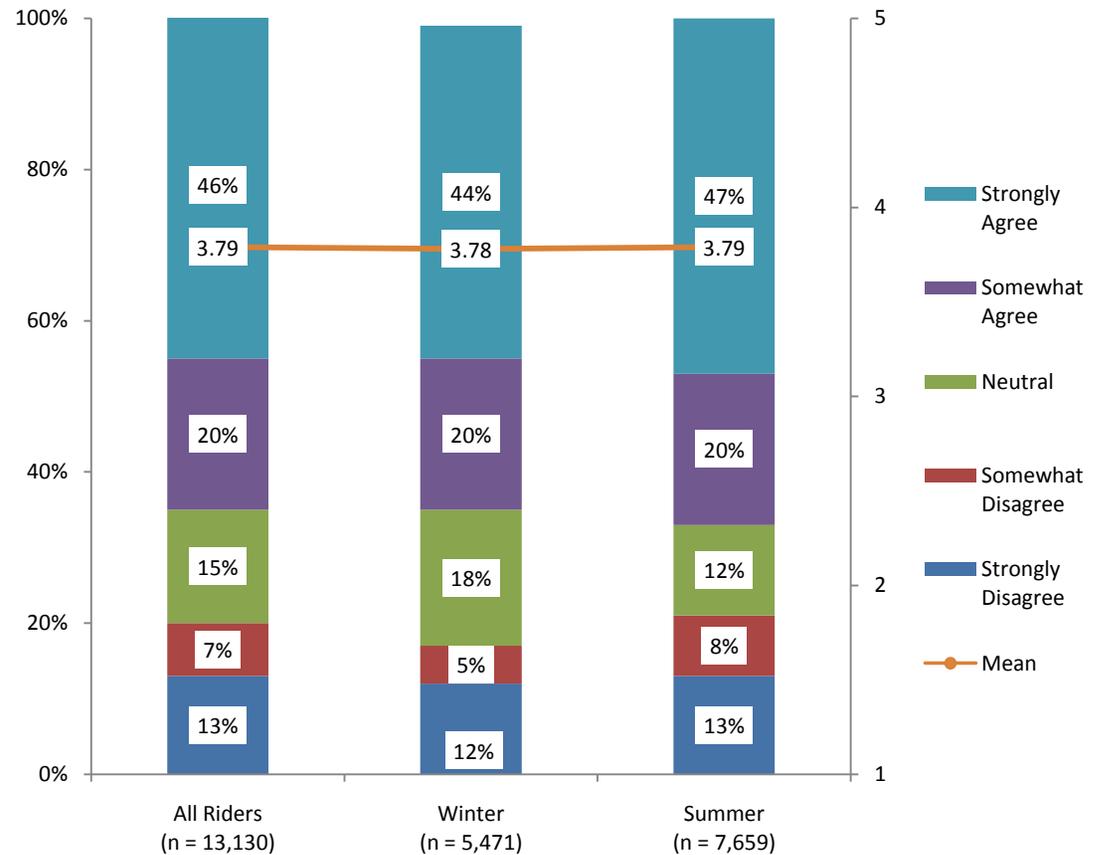
Respondents were asked to agree or disagree with the following statement: “If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.”

### All Riders: Agreement / Disagreement with Use It or Lose It Policy – Overall and by Season

Riders clearly agree that if a reservation customer does not arrive on time, their space would be released for general boarding and the customer would forfeit both their space and payment.

- Winter and summer riders are almost equally likely to agree with this policy. However . . .
  - Summer riders are more likely than winter riders to have an opinion on this policy. Sixty-seven percent (67%) of summer riders agree with this policy compared to 64 percent of winter riders. On the other hand, 21 percent of summer riders disagree compared with 17 percent of winter riders.
  - This difference most likely reflects the increase in recreation travel in the summer. Recreational travelers may be more accustomed to making reservations for their trips. In fact, they are likely to have made reservations for other aspects of their recreation trip which include a cancellation policy.

**Figure 1: Agreement / Disagreement with Use It or Lose It Policy**



Question: If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

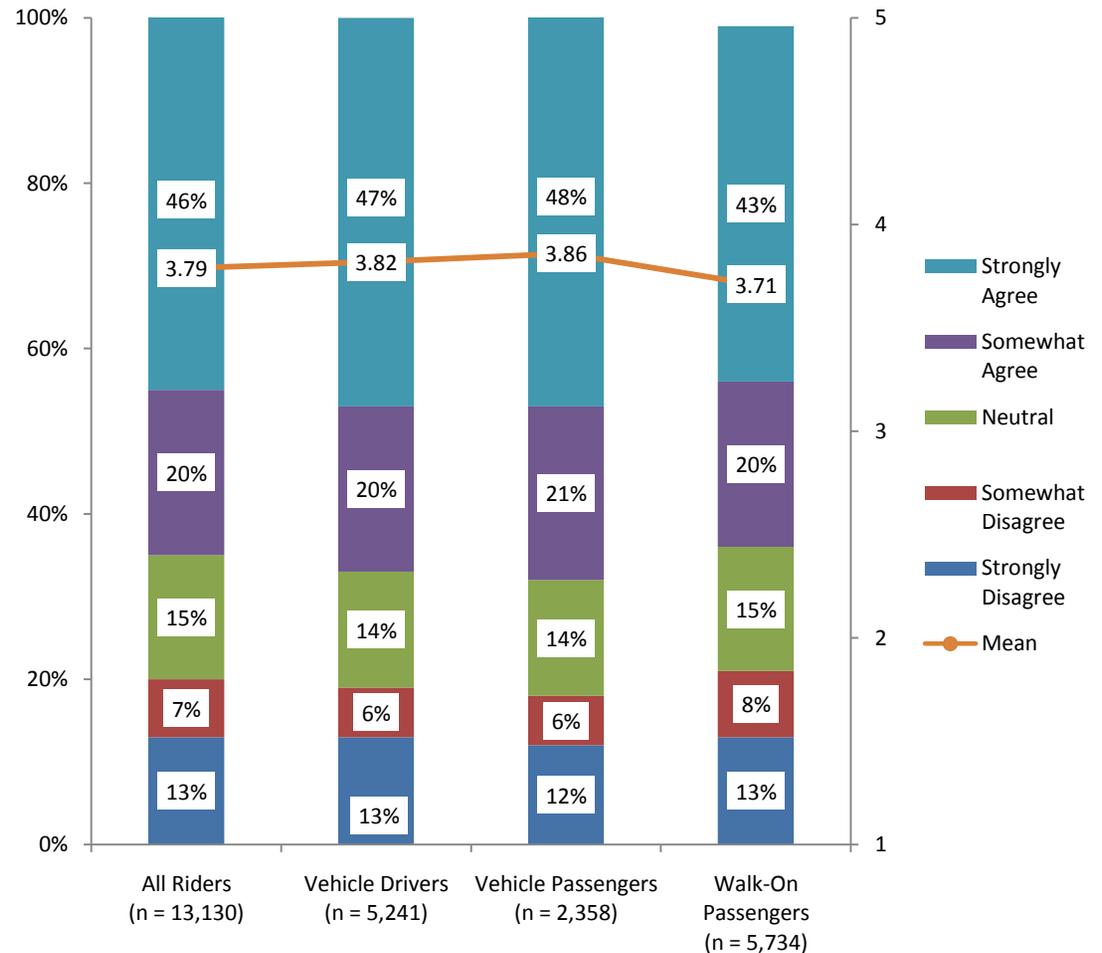
## Boarding Mode Analysis: Agreement / Disagreement with Use It or Lose It Policy

There is also general agreement with this policy across all boarding modes. Notably vehicle drivers and vehicle passengers – the segments most likely to be affected by this policy – have virtually identical opinions regarding this policy.

- There are no differences in vehicle driver or passenger attitudes between those traveling in the winter versus summer.

Walk-on passengers are more likely than those in vehicles to disagree with this policy – 21 percent disagrees.

**Figure 2: Agreement / Disagreement with Use It or Lose It Policy by Boarding Mode**



Question: If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## ***Route Level Analysis: Agreement / Disagreement with Use It or Lose It Policy***

Clearly those on the two Anacortes routes agree with the proposed policy that people who miss their reserved spot would forfeit the spot and pay the premium or reservation fee – 72 percent of those on the Anacortes / San Juans and 71 percent of those on the Anacortes / Sidney.

- Nearly half (46%) of Anacortes / San Juans riders “strongly agree” with this proposal. This is consistent with statements made in the qualitative research where San Juan Island residents expressed concerned that people without reservations would be unable to board even if there is space on the ferry.
- There are no differences in Anacortes / San Juans riders’ attitudes by season, suggesting that this could be an overall policy rather than something seasonal when demand is higher.

Riders on the other primarily recreational route, Keystone / Port Townsend, are less likely than those on the Anacortes / Sidney routes to agree with this proposal. Their attitudes are much more in alignment with riders on the other routes. Sixty-four percent (64%) of Keystone / Port Townsend riders agree with this proposal compared to 66 percent of WSF riders generally and more than 70 percent of those on the Anacortes routes.

- It is important to note, however, that there is a significant difference in Keystone / Port Townsend riders’ attitudes toward this policy between the winter and summer travel periods when a reservation system was first implemented. In the winter, 72 percent of all riders on this route agreed that a policy of “use it or lose it” should be implemented. This figure decreased to 59 percent in the summer after the policy was implemented. At the same time, disagreement more than tripled from just 7 percent in the winter to 25 percent in the summer. This would suggest that there may have been problems with the implementation of the system. The system must be able to ensure that only those that truly lose their space for not arriving on time are penalized.

Of the remaining routes, those on the three largest routes – Seattle / Bainbridge, Edmonds / Kingston, and Mukilteo / Clinton – are somewhat more likely to agree with this proposal.

- Those on the Edmonds / Kingston and Mukilteo / Clinton routes are the most likely to “strongly agree.”

While the majority of riders on these routes also agrees with this policy, those on the Seattle / Bremerton and Fauntleroy / Vashon routes are the most likely to disagree – 23 and 22 percent, respectively. These routes often demonstrate the strongest opinions throughout this report; in addition, they are the most price conscious.

- Those on the Fauntleroy / Vashon route are the most likely to “strongly disagree” (18%).

**Table 1: Agreement / Disagreement with Use It or Lose It Policy by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>Net Agree</b>	66%	65%	61%	68%	67%	62%	62%	69%	64%	<b>72%</b>	<b>71%</b>
<b>Strongly Agree</b>	46%	45%	40%	49%	48%	46%	45%	49%	44%	46%	35%
<b>Somewhat Agree</b>	20%	21%	21%	19%	19%	16%	17%	20%	20%	<b>26%</b>	<b>36%</b>
<b>Neutral</b>	15%	14%	16%	14%	15%	16%	17%	13%	17%	13%	8%
<b>Somewhat Disagree</b>	7%	7%	8%	6%	7%	4%	6%	7%	6%	8%	14%
<b>Strongly Disagree</b>	13%	13%	15%	13%	12%	<b>18%</b>	15%	11%	13%	7%	7%
<b>Net Disagree</b>	20%	20%	<b>23%</b>	19%	19%	<b>22%</b>	21%	18%	19%	15%	21%
<b>Mean</b>	3.79	3.77	3.62	3.86	3.84	3.68	3.69	3.90	3.76	3.97	3.78

Question: If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.  
 Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Time of Day / Week Travel Analysis: Agreement / Disagreement with Use It or Lose It Policy

There are no significant differences in attitudes toward this policy between those traveling during peak weekday travel periods, off-peak weekday travel periods, and weekends.

**Table 2: Agreement / Disagreement with Use It or Lose It Policy by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=13,130)	Total Peak Weekday (n=6,192)	Peak Weekday			Total Off-Peak Weekday (n=3,278)	Off-Peak Weekday			Total Weekend (n=3,660)	Weekend		
			Vehicle Driver (n=2,219)	Vehicle Passenger (n=685)	Walk-On (n=3,288)		Vehicle Driver (n=1,512)	Vehicle Passenger (n=584)	Walk-On (n=1,182)		Vehicle Driver (n=1,510)	Vehicle Passenger (n=886)	Walk-On (n=1,264)
Net Agree	66%	66%	67%	67%	64%	66%	67%	69%	62%	66%	67%	69%	62%
Strongly Agree	46%	46%	48%	45%	44%	46%	46%	51%	41%	46%	47%	47%	43%
Somewhat Agree	20%	20%	19%	22%	20%	20%	21%	18%	21%	20%	20%	22%	19%
Neutral	15%	14%	13%	14%	14%	16%	15%	15%	17%	14%	15%	12%	16%
Somewhat Disagree	7%	7%	6%	6%	8%	7%	6%	6%	8%	7%	5%	6%	10%
Strongly Disagree	13%	14%	15%	13%	14%	12%	12%	10%	13%	13%	13%	13%	13%
Net Disagree	20%	21%	21%	19%	22%	19%	18%	16%	21%	20%	18%	19%	23%
Mean	3.79	3.76	3.79	3.80	3.72	3.81	3.83	3.93	3.70	3.79	3.82	3.85	3.69

Question: If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.  
 Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## Other Significant Results: Agreement / Disagreement with Use It or Lose It Policy by Primary Trip Purpose

In general, all riders – regardless of travel purposes – support this policy.

- While the majority of those who use the ferry to commute also agrees, a somewhat higher than average percentage disagrees – 63 percent agrees but 22 percent disagrees.

**Table 3: Agreement / Disagreement with Use It or Lose It Policy by Trip Purpose**

	All Riders (n=13,130)	Commute (n=4,905)	Personal/ Shopping (n=2,110)	Recreation (n=3,040)	Social (n=1,743)	Other (n=1,113)
<i>Net Agree</i>	66%	63%	68%	65%	67%	68%
Strongly Agree	46%	44%	47%	45%	45%	49%
Somewhat Agree	20%	19%	21%	20%	22%	19%
Neutral	15%	15%	13%	15%	16%	14%
Somewhat Disagree	7%	7%	6%	8%	7%	6%
Strongly Disagree	13%	14%	13%	12%	11%	13%
<i>Net Disagree</i>	20%	22%	19%	20%	17%	19%
Mean	3.79	3.72	3.83	3.78	3.84	3.85

*Question: If a reservation customer does not arrive on time, their space would be released for general boarding and they would forfeit their reserved space and payment.*  
*Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.*

## Premium Fare

Respondents were asked to agree or disagree with the following statement: “Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.”

### All Riders: Agreement / Disagreement with Premium Fare Policy – Overall and by Season

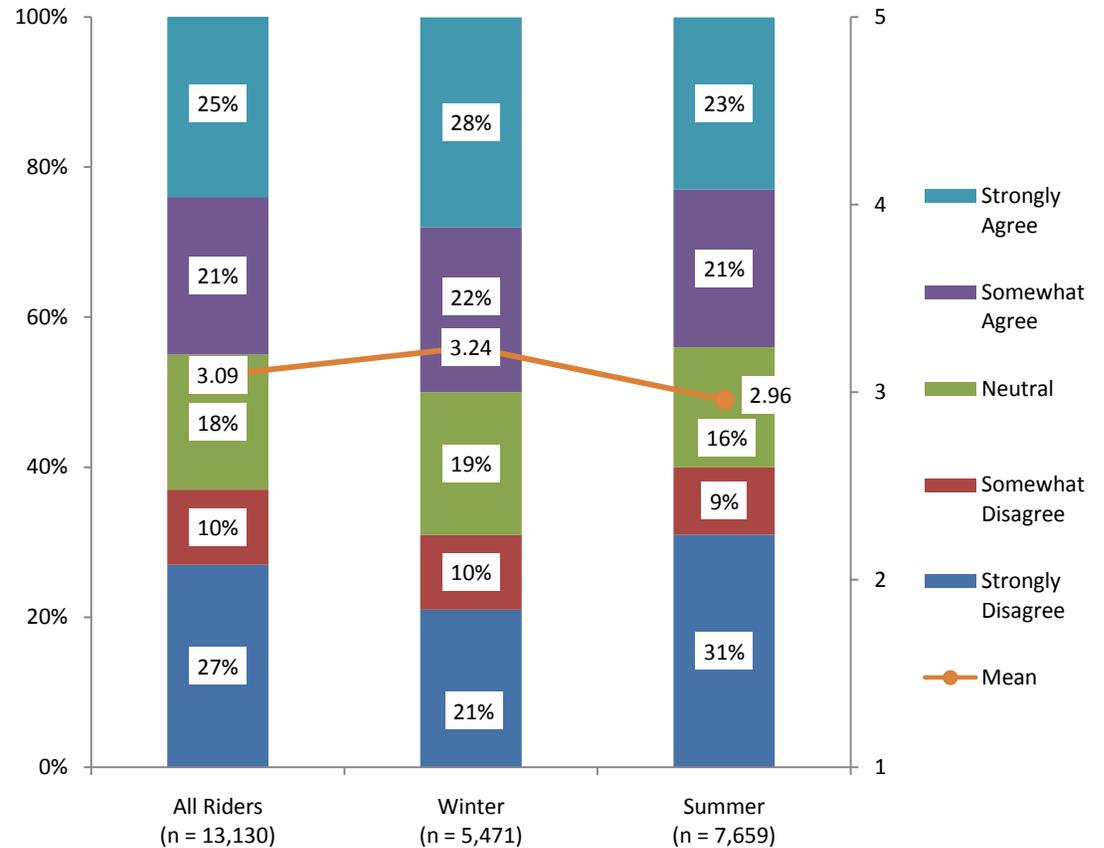
Riders have clearly divided opinions regarding paying a premium over the regular fare for a reservation.

- While 46 percent agrees that there should be a premium charged for a reservation, 37 percent disagrees.
- Moreover, among those that disagree, nearly three times as many “strongly disagrees” as “somewhat disagrees” – 27 percent compared to 10 percent, respectively.

Of particular note are the sharply different opinions between winter and summer riders.

- Summer riders are more likely than winter riders to disagree with this proposal. Two out of five (40%) summer riders disagree compared to 31 percent of winter riders. In fact, the percentage of summer riders who “strongly disagree” (31%) is the same as the total level of disagreement among winter riders (31%). This sharply different opinion may in part reflect the summer surcharge.

**Figure 3: Agreement / Disagreement with Premium Fare Policy**



Question: Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Boarding Mode Analysis: Agreement / Disagreement with Premium Fare Policy

There is general agreement / disagreement with this policy across all boarding modes. However, vehicle drivers and passengers are more likely than walk-on passengers to “strongly disagree” with this policy.

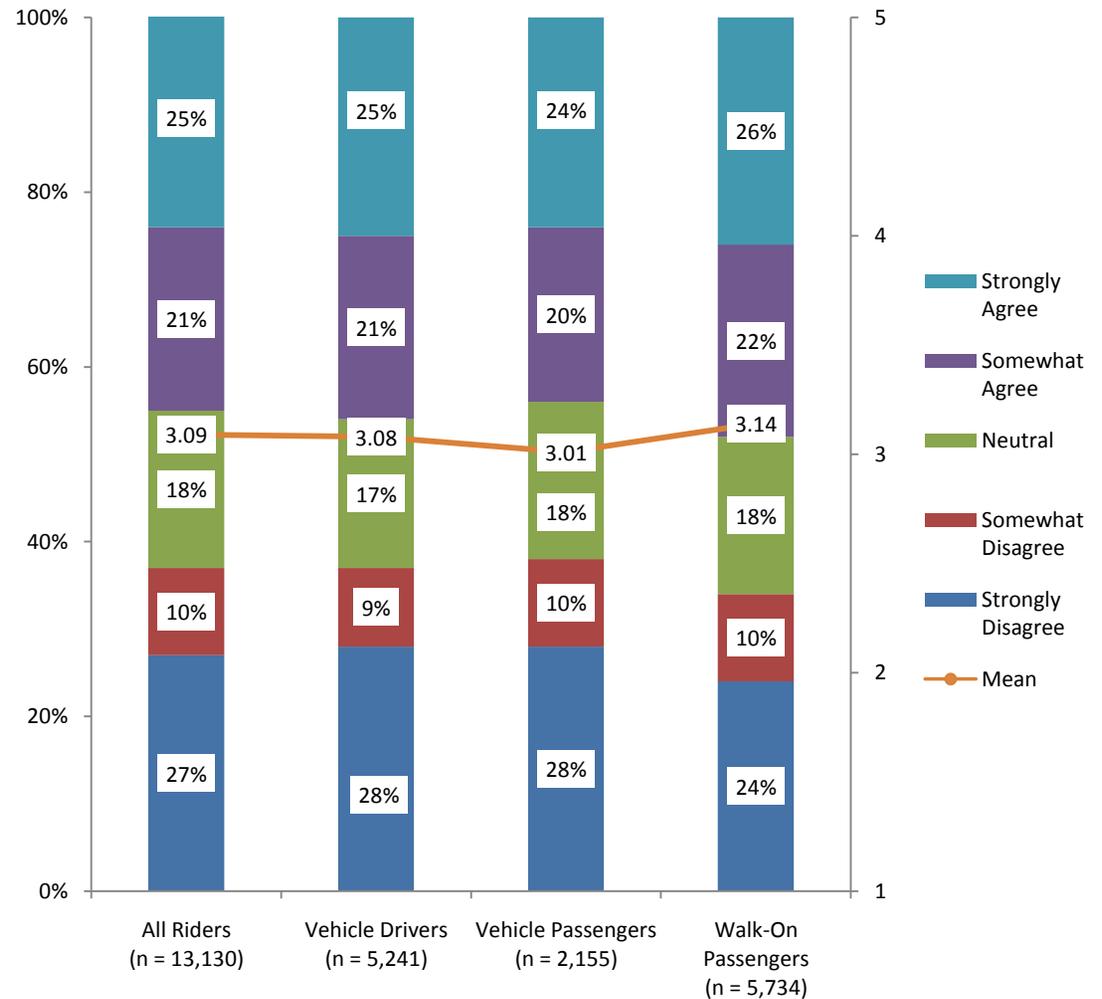
- Twenty-eight percent (28%) of vehicle drivers and passengers “strongly disagree” compared with 24 percent of walk-on passengers.

The seasonal differences noted above are consistent across all passenger types.

**Table 4: Agreement / Disagreement with Premium Fare Policy by Boarding Mode by Season**

	All Riders	Vehicle Drivers	Vehicle Passengers	Walk-on Passengers
<b>Net Agreement</b>				
Winter	49%	50%	47%	50%
Summer	44%	43%	42%	45%
<b>Net Disagreement</b>				
Winter	31%	32%	33%	29%
Summer	40%	40%	42%	38%

**Figure 4: Agreement / Disagreement with Premium Fare Policy**



Question: Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.  
 Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Route Level Analysis: Agreement / Disagreement with Premium Fare Policy

Summer riders on the Anacortes / Sidney route are the most likely to disagree with the policy to have reservation customers pay a premium over the regular vehicle ticket price. This is not surprising given that riders on this route can currently make a reservation without a fee.

Riders on the Port Townsend / Keystone route are also more likely than those on other routes to disagree with this policy. There are significant differences in opinions between winter and summer riders on this route which clearly reflect the launch of a reservation system on this route in May 2008. Like Anacortes / Sidney, there is no fee or premium charged to make a reservation.

- Nearly twice as many winter riders than summer riders on this route agreed with this policy – 43 percent compared to 22 percent, respectively. The change in attitudes following the launch of the system is dramatic – 64 percent of summer riders disagree compared to 35 percent of winter riders. Notably, the level of summer riders’ disagreement is very high – 53 percent “strongly disagrees.”

Among the other routes, riders on the Seattle / Bainbridge and Fauntleroy / Vashon routes are the most likely to agree with this policy – 50 percent and 49 percent net agreement, respectively.

**Table 5: Agreement / Disagreement with Premium Fare Policy by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>Net Agree</b>	46%	<b>50%</b>	42%	46%	46%	<b>49%</b>	47%	42%	30%	46%	22%
Strongly Agree	25%	<b>28%</b>	22%	26%	23%	<b>28%</b>	28%	23%	12%	21%	11%
Somewhat Agree	21%	22%	20%	20%	23%	21%	19%	19%	18%	25%	11%
Neutral	18%	18%	20%	18%	18%	16%	19%	19%	17%	15%	19%
Somewhat Disagree	10%	9%	9%	10%	8%	9%	10%	9%	11%	13%	14%
Strongly Disagree	27%	23%	28%	27%	28%	27%	25%	29%	<b>41%</b>	26%	<b>45%</b>
<b>Net Disagree</b>	37%	32%	37%	37%	36%	36%	35%	38%	<b>52%</b>	39%	<b>59%</b>
Mean	3.09	3.23	2.99	3.09	3.05	3.13	3.16	2.97	2.48	3.02	2.30

Question: Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Time of Day / Week Travel Analysis: Agreement / Disagreement with Premium Fare Policy

There are some differences in opinions based on the time of day and day of the week traveled. However, these differences are small and are in fact largely driven by walk-on passengers.

- The exception is that weekend vehicle drivers are more likely than off-peak weekday vehicle drivers to agree with having reservation passengers pay a higher fare.

**Table 6: Agreement / Disagreement with Premium Fare Policy by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=13,130)	Total Peak Weekday (n=6,192)	Peak Weekday			Total Off-Peak Weekday (n=3,278)	Off-Peak Weekday			Total Weekend (n=3,660)	Weekend		
			Vehicle Driver (n=2,219)	Vehicle Passenger (n=685)	Walk-On (n=3,288)		Vehicle Driver (n=1,512)	Vehicle Passenger (n=584)	Walk-On (n=1,182)		Vehicle Driver (n=1,510)	Vehicle Passenger (n=886)	Walk-On (n=1,264)
Net Agree	46%	48%	47%	44%	52%	43%	44%	41%	43%	47%	48%	46%	46%
Strongly Agree	25%	27%	26%	24%	30%	23%	23%	21%	23%	25%	28%	25%	22%
Somewhat Agree	21%	21%	21%	20%	22%	20%	21%	20%	20%	22%	20%	21%	24%
Neutral	18%	16%	15%	18%	15%	20%	19%	21%	21%	18%	17%	16%	20%
Somewhat Disagree	10%	9%	9%	9%	9%	9%	9%	9%	9%	11%	9%	12%	13%
Strongly Disagree	27%	27%	29%	30%	24%	28%	28%	30%	28%	25%	26%	26%	22%
Net Disagree	37%	36%	38%	39%	33%	37%	37%	39%	37%	37%	35%	38%	35%
Mean	3.09	3.14	3.07	2.98	3.25	3.01	3.03	2.93	3.01	3.12	3.15	3.09	3.11

Question: Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## ***Other Significant Results: Agreement / Disagreement with Premium Fare Policy by Primary Trip Purpose***

Commuters are more likely than those traveling for personal, shopping, or recreation trips to agree with this policy to have reservation passengers pay a premium over the regular vehicle ticket price. This would suggest that commuters are willing to pay to ensure a guaranteed space on the ferry at a specific time.

On the other hand, those traveling for personal / shopping or recreation trips are more likely to disagree with this policy.

**Table 7: Agreement / Disagreement with Premium Fare Policy by Trip Purpose**

	All Riders (n=13,130)	Commute (n=4,905)	Personal/ Shopping (n=2,110)	Recreation (n=3,040)	Social (n=1,743)	Other (n=1,113)
<i>Net Agree</i>	46%	<b>50%</b>	45%	43%	48%	45%
Strongly Agree	25%	<b>29%</b>	25%	23%	23%	25%
Somewhat Agree	21%	21%	20%	20%	25%	20%
Neutral	18%	17%	16%	19%	19%	19%
Somewhat Disagree	10%	8%	9%	11%	10%	10%
Strongly Disagree	27%	25%	<b>30%</b>	27%	24%	27%
<i>Net Disagree</i>	37%	33%	<b>39%</b>	38%	34%	37%
Mean	3.09	3.20	3.00	3.00	3.11	3.06

*Question: Customers with a vehicle reservation would pay a premium over the regular vehicle ticket price. Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.*

## Limit Amount of Reservation Space

Respondents were asked whether they agree or disagree with the following statement: “A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.”

### All Riders: Agreement / Disagreement with Policy to Limit Amount of Reservation Space – Overall and by Season

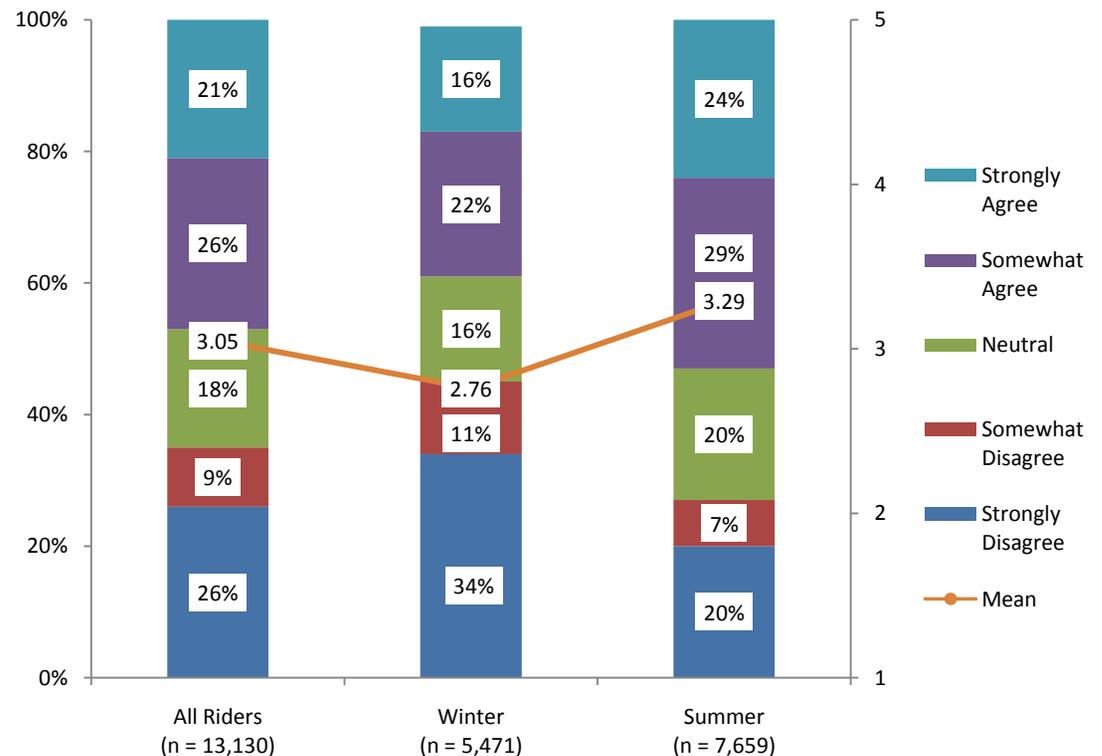
Riders have clearly divided opinions regarding whether there should be a limit on the amount of space set aside for reservations.

- While more riders agree than disagree with this proposal – 47 percent net agreement compared to 35 percent net disagreement – those that disagree do so strongly. More than one out of four (26%) riders “strongly disagree.”

Winter riders are more likely than summer riders to disagree with this policy – 45 percent compared to 27 percent, respectively.

- Conversely, 53 percent of summer riders agree compared to 38 percent of winter riders.

**Figure 5: Agreement / Disagreement with Policy to Limit Amount of Reservation Space**



Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

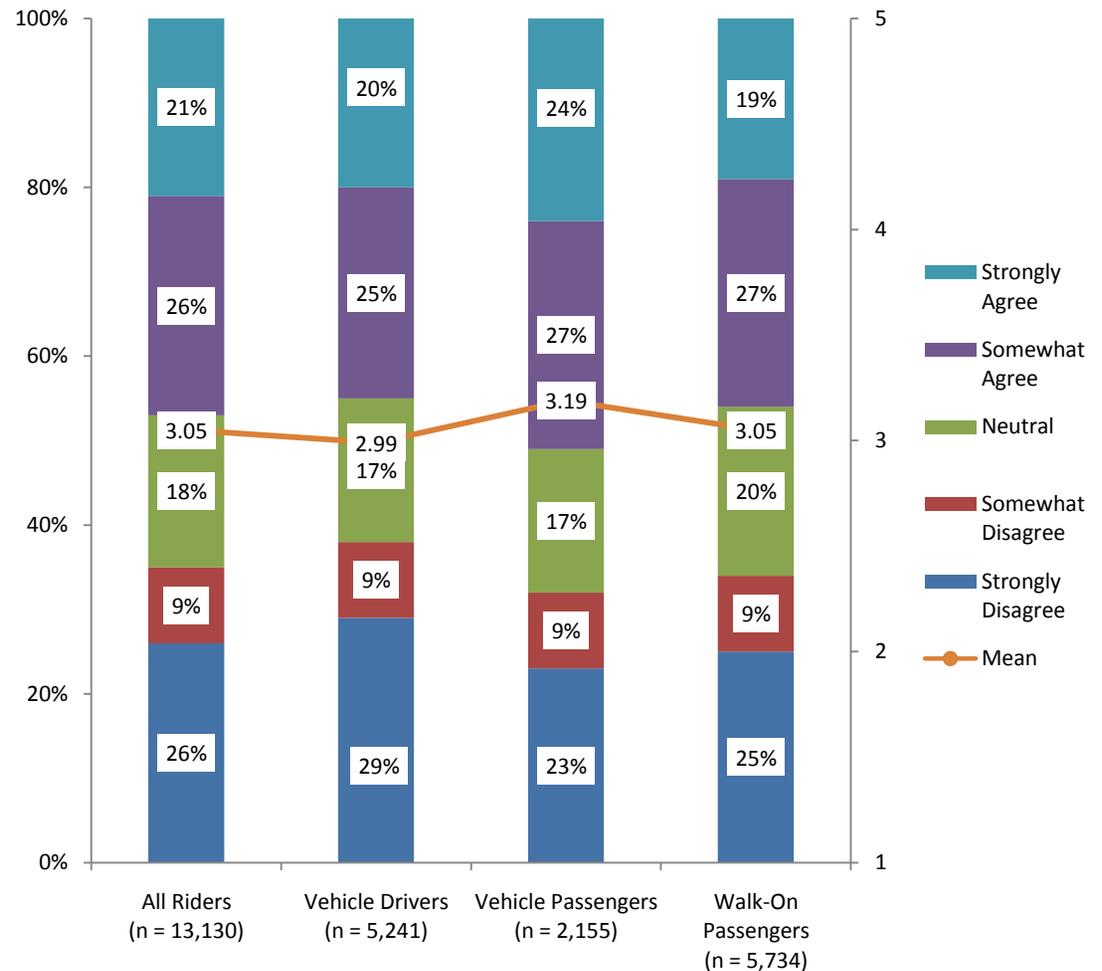
## Boarding Mode Analysis: Agreement / Disagreement with Policy to Limit Amount of Reservation Space

Vehicle drivers and passengers have surprisingly different views on this proposal.

- Over half (51%) of vehicle passengers agree with the proposal to limit the amount of space for reservation compared to 45 percent of vehicle drivers.
- Conversely, nearly two out of five (38%) vehicle drivers disagree with this proposal compared to 32 percent of vehicle passengers.

The higher levels of agreement among summer riders is evident for all passenger types.

**Figure 6: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Boarding Mode**



Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## Route Level Analysis: Agreement / Disagreement with Policy to Limit Amount of Reservation Space

Passengers on the three major recreational routes – Port Townsend / Keystone, Anacortes / San Juans, and Anacortes / Sidney – clearly agree that the amount of reservation space should be limited.

- Nearly two out of three (65%) Anacortes / San Juans passengers agree with this proposal. There are no differences between winter and summer riders on this route.
- Seventy percent (70%) of Anacortes / Sidney riders agrees.
- Somewhat fewer (58%) Port Townsend / Keystone riders agree. However, there are significant differences between winter and summer riders on this route. Less than half (48%) of winter riders agreed with this statement. Following the launch of a vehicle reservation system, 65 percent of summer riders agreed. This would suggest that riders may prefer a vehicle reservation system that is offered as a convenience, but that is not mandatory for all vehicles.

With the exception of the Fauntleroy / Vashon route, there are few other significant differences in response to this policy across the routes.

- Half (49%) of Fauntleroy / Vashon riders oppose this proposal. Only 34 percent agrees.
- Opposition comes primarily from winter riders. Sixty-two percent (62%) of winter riders on this route disagree compared to 38 percent of summer riders.

**Table 8: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>Net Agree</b>	47%	46%	43%	48%	45%	34%	43%	39%	<b>58%</b>	<b>65%</b>	<b>70%</b>
<b>Strongly Agree</b>	21%	19%	19%	21%	21%	13%	22%	13%	29%	<b>31%</b>	30%
<b>Somewhat Agree</b>	26%	27%	24%	27%	24%	21%	21%	26%	29%	<b>34%</b>	<b>40%</b>
<b>Neutral</b>	18%	18%	23%	18%	19%	16%	17%	17%	17%	18%	18%
<b>Somewhat Disagree</b>	9%	9%	9%	8%	9%	10%	8%	9%	10%	7%	8%
<b>Strongly Disagree</b>	26%	27%	26%	26%	27%	39%	32%	35%	15%	11%	4%
<b>Net Disagree</b>	35%	36%	35%	34%	36%	<b>49%</b>	40%	44%	25%	18%	12%
<b>Mean</b>	3.05	3.03	3.02	3.08	3.02	2.58	2.94	2.73	3.47	3.67	3.84

Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## Time of Day / Week Travel Analysis: Agreement / Disagreement with Policy to Limit Amount of Reservation Space

Perhaps reflecting a wish for flexibility or spontaneity, weekend riders are more likely than those traveling during the week to agree that the amount of reservation space should be limited.

**Table 9: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=13,130)	Total Peak Weekday (n=6,192)	Peak Weekday			Total Off-Peak Weekday (n=3,278)	Off-Peak Weekday			Total Weekend (n=3,660)	Weekend		
			Vehicle Driver (n=2,219)	Vehicle Passenger (n=685)	Walk-On (n=3,288)		Vehicle Driver (n=1,512)	Vehicle Passenger (n=584)	Walk-On (n=1,182)		Vehicle Driver (n=1,510)	Vehicle Passenger (n=886)	Walk-On (n=1,264)
Net Agree	47%	45%	45%	49%	44%	45%	44%	46%	47%	49%	48%	55%	46%
Strongly Agree	21%	20%	21%	23%	19%	19%	19%	21%	18%	22%	22%	26%	19%
Somewhat Agree	26%	25%	23%	26%	26%	26%	25%	25%	29%	27%	26%	29%	27%
Neutral	18%	17%	15%	18%	18%	19%	18%	18%	21%	19%	17%	17%	23%
Somewhat Disagree	9%	9%	9%	8%	9%	9%	10%	8%	8%	8%	8%	9%	8%
Strongly Disagree	26%	29%	31%	25%	28%	27%	28%	28%	24%	23%	27%	19%	22%
Net Disagree	35%	38%	40%	33%	37%	36%	38%	36%	32%	31%	35%	28%	30%
Mean	3.05	2.99	2.95	3.15	2.97	3.01	2.96	3.03	3.08	3.17	3.07	3.35	3.14

Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

**Other Significant Results: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Primary Trip Purpose**

Those traveling for non-commute trips are more likely than commuters to agree that the amount of reservation space should be limited.

- Nearly half (49%) of those traveling for non-commute purposes agree with this proposal compared to 40 percent of commuters.
- More than half (53%) of those traveling for recreation and 50 percent of those traveling to visit friends and family agree.

As stated in the previous page, this would suggest that riders would prefer a system that allows for some flexibility and spontaneity rather than a system that requires advance reservations for all vehicles.

**Table 10: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Trip Purpose**

	All Riders (n=13,130)	Commute (n=4,905)	Personal/ Shopping (n=2,110)	Recreation (n=3,040)	Social (n=1,743)	Other (n=1,113)
<i>Net Agree</i>	47%	40%	<b>45%</b>	<b>53%</b>	<b>50%</b>	<b>48%</b>
Strongly Agree	21%	17%	21%	23%	22%	23%
Somewhat Agree	26%	23%	24%	30%	28%	25%
Neutral	18%	18%	17%	22%	18%	17%
Somewhat Disagree	9%	10%	9%	8%	10%	8%
Strongly Disagree	26%	<b>32%</b>	29%	18%	22%	27%
<i>Net Disagree</i>	35%	<b>42%</b>	38%	26%	32%	35%
Mean	3.05	2.83	2.99	3.33	3.18	3.08

*Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.*

*Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.*

**Other Significant Results: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Frequency of Riding**

Occasional riders – taking six or fewer one-way trips per month – are the most likely to agree with this policy.

- Over half (52%) of those taking less than seven one-way trips per month agree that the amount of reservation space should be limited.

Those who travel occasionally for recreation are the most likely to agree (55%).

**Table 11: Agreement / Disagreement with Policy to Limit Amount of Reservation Space by Frequency of Riding**

	All Riders (n=13,130)	6 or Less (n=4,733)	7 to 24 (n=3,121)	25 to 44 (n=2,673)	45 Plus (n=1,480)
<i>Net Agree</i>	47%	<b>52%</b>	44%	40%	40%
Strongly Agree	21%	<b>23%</b>	19%	18%	18%
Somewhat Agree	26%	<b>29%</b>	25%	22%	22%
<i>Neutral</i>	18%	20%	16%	17%	16%
Somewhat Disagree	9%	9%	9%	9%	10%
Strongly Disagree	26%	19%	31%	33%	34%
<i>Net Disagree</i>	35%	<b>28%</b>	40%	42%	44%
Mean	3.05	3.29	2.92	2.81	2.80

*Question: A specific but limited amount of reserved space for vehicles should be set aside on each boat for advance reservations.*

*Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.*

## Limit Reservation System to Recreation / Tourist Routes

Respondents were asked to agree or disagree with the following statement: “Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.”

### All Riders: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes – Overall and by Season

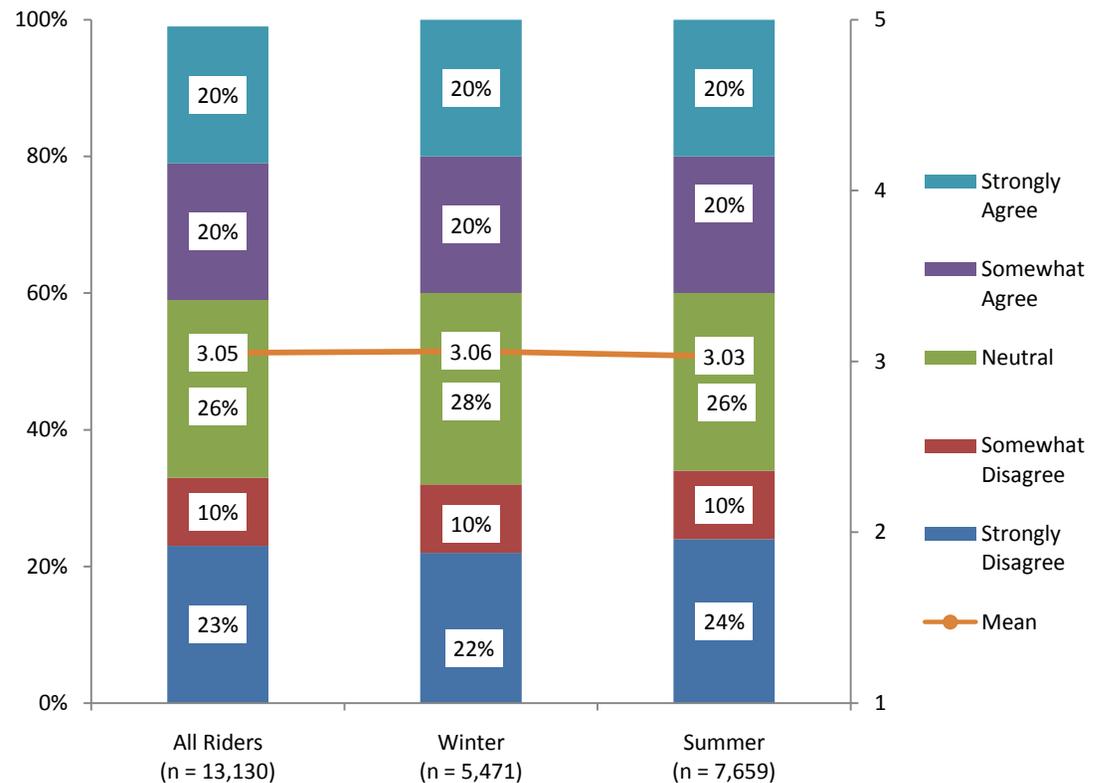
Riders have clearly divided opinions regarding whether a reservation system should be limited to those routes that have high recreation / tourist travel.

- While more riders agree than disagree with this proposal – 40 percent net agreement compared to 33 percent net disagreement – those that disagree do so strongly. More than twice as many riders “strongly disagree” than “somewhat disagree” – 23 percent compared to 10 percent, respectively.

What is notable in this analysis is the high percentage of riders who neither agree nor disagree with this proposal.

Unlike other attitudes toward reservation systems, there are no seasonal differences.

**Figure 7: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes**



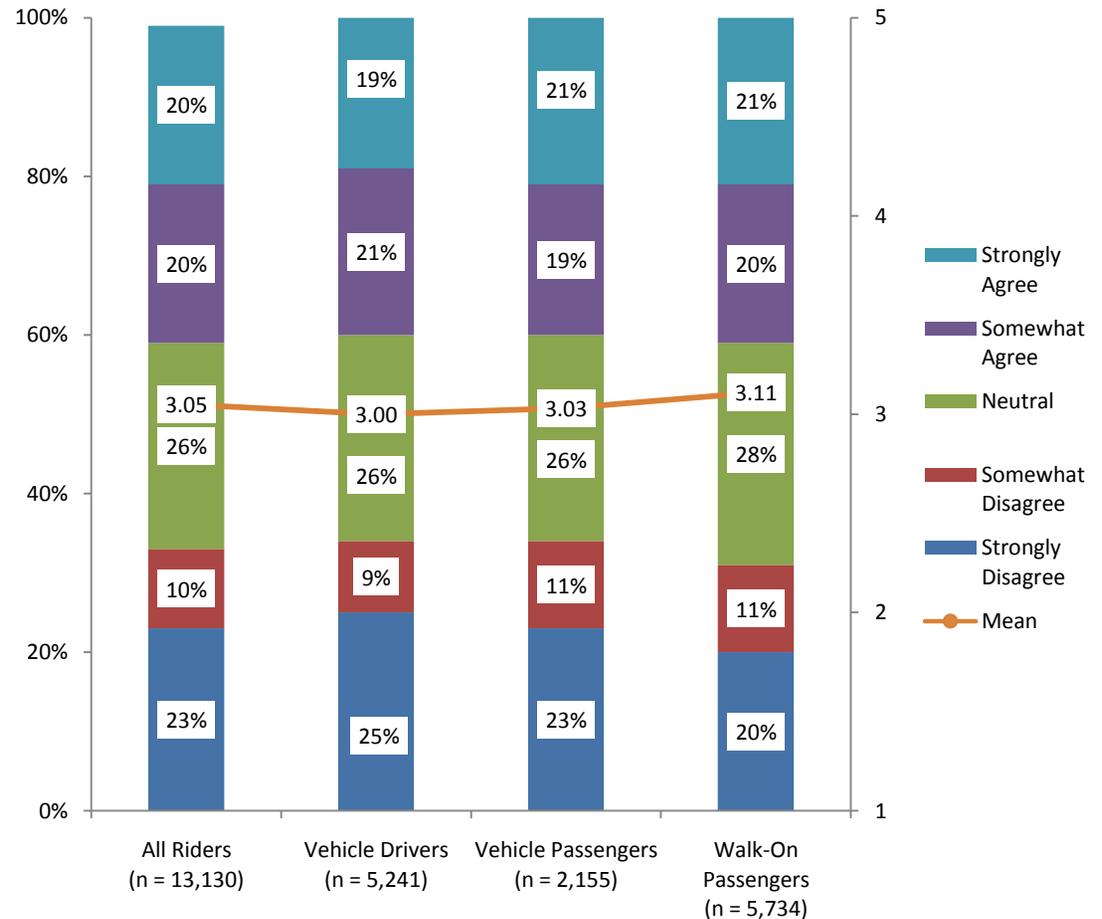
Question: Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.  
 Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Boarding Mode Analysis: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes

There are no significant differences in the extent to which different types of passenger agree with this proposal to limit the reservation system to recreation / tourist routes.

Vehicle drivers are more likely than walk-on passengers to “strongly disagree” – 25 percent compared to 20 percent respectively.

**Figure 8: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes by Boarding Mode**



Question: Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.  
 Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Route Level Analysis: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes

With the exception the Fauntleroy / Vashon route, there are no differences in attitudes toward this proposal across the routes.

- Fauntleroy / Vashon riders are more likely than other riders to have an opinion regarding this proposal. In addition, this opinion is more likely to lean toward support for limiting the reservation system to recreation / tourist routes. Nearly half (49%) of all riders on this route agree.

**Table 12: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>Net Agree</b>	40%	41%	36%	38%	43%	<b>49%</b>	39%	45%	35%	37%	36%
<b>Strongly Agree</b>	20%	19%	20%	20%	22%	<b>26%</b>	23%	29%	15%	13%	15%
<b>Somewhat Agree</b>	20%	22%	16%	18%	21%	<b>23%</b>	16%	16%	20%	24%	21%
<b>Neutral</b>	26%	26%	29%	28%	26%	21%	27%	27%	27%	27%	27%
<b>Somewhat Disagree</b>	10%	11%	10%	11%	8%	8%	9%	6%	15%	13%	13%
<b>Strongly Disagree</b>	23%	22%	25%	24%	23%	22%	25%	22%	23%	22%	25%
<b>Net Disagree</b>	33%	33%	35%	35%	31%	30%	34%	28%	38%	35%	38%
<b>Mean</b>	3.05	3.06	2.95	3.00	3.12	3.22	3.03	3.23	2.90	2.93	2.88

Question: Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.  
 Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

## ***Time of Day / Week Travel Analysis: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes***

Perhaps reflecting a wish for flexibility or spontaneity in the trips they wish to take, weekend riders are less likely than those traveling during the week to agree that the reservation system should be limited to recreation and tourist routes.

- Peak weekday riders' agreement with this proposal is driven primarily by walk-on passengers – 44 percent of walk-on-passengers agree.

**Table 13: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=13,130)	Total Peak Weekday (n=6,192)	Peak Weekday			Total Off-Peak Weekday (n=3,278)	Off-Peak Weekday			Total Weekend (n=3,660)	Weekend		
			Vehicle Driver (n=2,219)	Vehicle Passenger (n=685)	Walk-On (n=3,288)		Vehicle Driver (n=1,512)	Vehicle Passenger (n=584)	Walk-On (n=1,182)		Vehicle Driver (n=1,510)	Vehicle Passenger (n=886)	Walk-On (n=1,264)
<b>Net Agree</b>	40%	<b>41%</b>	39%	40%	<b>44%</b>	<b>42%</b>	43%	39%	41%	37%	35%	41%	36%
Strongly Agree	20%	21%	20%	20%	23%	20%	19%	20%	22%	19%	18%	22%	18%
Somewhat Agree	20%	20%	19%	20%	21%	22%	24%	19%	19%	18%	17%	19%	18%
Neutral	26%	24%	24%	25%	24%	27%	25%	27%	29%	29%	29%	26%	32%
Somewhat Disagree	10%	10%	9%	10%	11%	9%	9%	9%	10%	11%	10%	12%	11%
Strongly Disagree	23%	24%	27%	26%	21%	22%	23%	25%	19%	22%	25%	21%	21%
<b>Net Disagree</b>	33%	<b>34%</b>	37%	36%	32%	31%	32%	34%	29%	33%	35%	33%	32%
Mean	3.05	3.04	2.96	2.98	3.14	3.08	3.07	2.99	3.15	3.01	2.94	3.10	3.02

Question: Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" 3 is the mid-point.

**Other Significant Results: Agreement / Disagreement with Policy to Limit Reservation System to Recreation / Tourist Routes by Primary Trip Purpose**

Commuters are more likely than those traveling for non-commute purposes to agree with this proposal.

- Forty-five percent (45%) of those traveling for commute trips agree with this proposal compared to 38 percent of non-commuters.

Those traveling for personal / shopping and other trips are the most likely to disagree with this proposal. Note that the personal / shopping trip category includes medical appointments and the “other” category includes business appointments and trips to the airport.

This is somewhat surprising given the nature of the proposal – that is, those traveling for recreation purposes are the most likely to neither agree nor disagree with this proposal (31%).

**Table 14: Agreement / Disagreement with Policy to Limit System to Recreation / Tourist Routes by Trip Purpose**

	All Riders (n=13,130)	Commute (n=4,905)	Personal/ Shopping (n=2,110)	Recreation (n=3,040)	Social (n=1,743)	Other (n=1,113)
<i>Net Agree</i>	40%	<b>45%</b>	40%	37%	38%	39%
Strongly Agree	20%	<b>24%</b>	21%	16%	19%	18%
Somewhat Agree	20%	21%	19%	21%	19%	21%
Neutral	26%	24%	24%	<b>31%</b>	28%	25%
Somewhat Disagree	10%	9%	10%	11%	12%	10%
Strongly Disagree	23%	22%	26%	21%	22%	26%
<i>Net Disagree</i>	33%	31%	36%	32%	34%	37%
Mean	3.05	3.17	2.98	3.01	3.02	2.93

Question: Only routes and/or sailings with high recreational / tourist travel should have a vehicle reservation system.

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” 3 is the mid-point.

## Other Attitudes toward Proposed Reservation System

In the summer, additional attitude statements were added to test three proposed aspects of a reservation system.

### All Summer Riders: Agreement / Disagreement with Other Proposed Policies Regarding Reservations

Summer riders agree that the reservation system would be dynamic and would be able to provide current information on how much capacity on the boat is reserved, how much is available for a reservation, and how much is open on a first come, first served basis.

- More than seven out of ten (71%) summer riders agree this should be part of the reservation system. Moreover, the level of agreement is high, with 51 percent of all summer riders agreeing strongly.

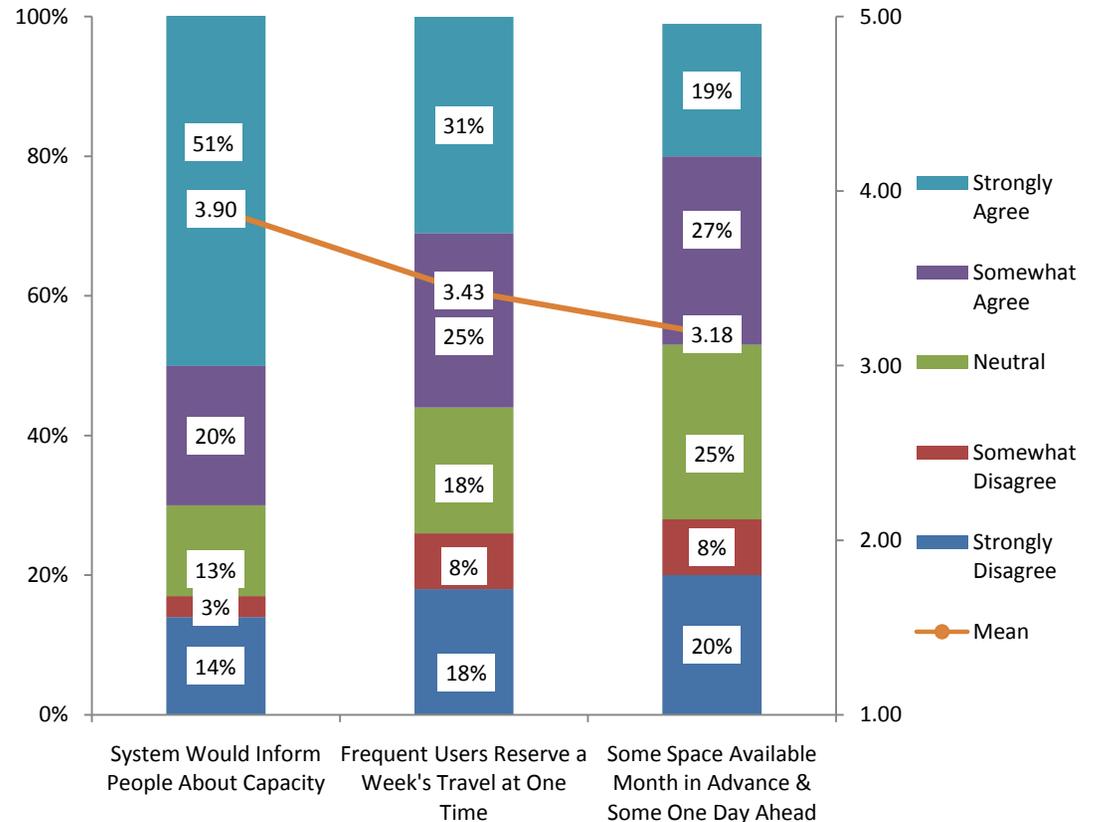
The majority (56%) of summer riders also agree that frequent riders should be able to conveniently reserve a full week's travel with one visit to the reservation system.

- Opinions, however, are mixed. While 31 percent "strongly agrees," 25 percent "somewhat agrees."
- On the other hand, more than one out of four (26%) disagrees; 18 percent "strongly disagrees."

Opinions are more mixed regarding the proposal to make some space available for reservations a month ahead of travel and retaining some space for reservations one day ahead of travel.

- Forty-six percent (46%) of summer riders agree with this proposal. However, the level of agreement is relatively low with more riders "somewhat agreeing" than "strongly agreeing."
- Of particular note here is the relatively high percentage (25%) of riders who neither agree nor disagree. This suggests that they may not fully understand how this would work or have concerns about the implications this strategy would have on their travel or this proposal is not important to them.

**Figure 9: Agreement / Disagreement with Other Proposed Policies Regarding Reservations**



Question: To what extent do you agree / disagree with the following statements?

Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" "3" is the midpoint.

Base: Summer Riders (n=7,659)

## Boarding Mode Analysis: Other Attitudes toward Proposed Reservation System

There are no differences in the extent to which summer riders boarding by different modes agree with these three reservation system proposals.

Moreover, with one exception, there are no differences in the extent to which different summer passengers disagree with these proposals.

- Walk-on summer passengers are more likely than vehicle drivers and passengers to disagree that frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system.

**Table 15: Other Attitudes toward Proposed Reservation System by Boarding Mode**

	All Summer Riders (n=7,659)	Vehicle Drivers (n=2,883)	Vehicle Passengers (n=1,537)	Walk-On Passengers (n=3,239)
	<b>The reservation system would inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first served</b>			
Net Agreement	70%	70%	71%	70%
Neutral	13%	13%	13%	12%
Net Disagreement	17%	17%	16%	18%
	<b>Frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system</b>			
Net Agreement	56%	57%	58%	54%
Neutral	18%	18%	20%	18%
Net Disagreement	26%	25%	22%	<b>28%</b>
	<b>Some space should be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel</b>			
Net Agreement	47%	45%	49%	47%
Neutral	25%	26%	25%	23%
Net Disagreement	28%	29%	26%	29%

## Route Level Analysis: Other Attitudes toward Proposed Reservation System

With the exception of summer riders on the Keystone / Port Townsend, Anacortes / San Juans, and Anacortes / Sidney routes, there are no differences in attitudes toward these three proposals for a reservation system.

- Summer riders on the Keystone / Port Townsend, Anacortes / San Juans, and Anacortes / Sidney routes are all more likely than riders on the other routes to agree that the reservation system would inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first served and that frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system.
- In addition, summer riders on the two Anacortes routes are more likely than riders on all other routes to agree that some space should be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.

**Table 16: Other Attitudes toward Proposed Reservation System by Route**

	Summer Riders (n=7,659)	SEA/ BAIN (n=2,540)	SEA/ BRE (n=809)	EDM/ KIN (n=1,417)	MUK/ CLI (n=1,143)	FAU/ VAS (n=252)	FAU/ SOU (n=279)	PTD/ TAH (n=54)	KEY/ PTT (n=304)	ANA/ SAN (n=652)	ANA/ SID (n=209)
	<b>The reservation system would inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first served</b>										
Net Agreement	70%	69%	66%	70%	65%	68%	70%	71%	<b>76%</b>	<b>85%</b>	<b>88%</b>
Neutral	13%	14%	14%	13%	15%	14%	14%	11%	10%	5%	6%
Net Disagreement	17%	17%	20%	17%	20%	18%	17%	18%	13%	10%	6%
	<b>Frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system</b>										
Net Agreement	56%	54%	54%	58%	55%	45%	59%	51%	<b>66%</b>	<b>68%</b>	<b>75%</b>
Neutral	18%	18%	18%	17%	20%	23%	15%	22%	12%	15%	18%
Net Disagreement	26%	28%	27%	24%	25%	32%	26%	27%	21%	17%	7%
	<b>Some space should be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel</b>										
Net Agreement	47%	47%	42%	47%	44%	40%	47%	36%	45%	<b>64%</b>	<b>64%</b>
Neutral	25%	23%	26%	24%	27%	27%	24%	31%	30%	20%	22%
Net Disagreement	28%	29%	32%	29%	28%	33%	29%	33%	26%	16%	14%

## Time of Day / Week of Travel Analysis: Other Attitudes toward Proposed Reservation System

Most likely reflecting greater concerns about available capacity, peak weekday and weekend summer riders are more likely than off-peak summer riders to agree that the system needs to be dynamic in nature and be able to inform riders about how much capacity is reserved versus available to be reserved and whether there is space for general boarding.

- However, the majority of all summer riders agree that this is an important component of the system.

There are no differences in the extent to which summer riders boarding at different times of the day or week agree or disagree that frequent riders should be able to reserve a full week's travel at once.

Weekend summer are more likely than weekday summer riders, both peak and off-peak riders, to agree that some space should be available a month ahead of travel and some space should be available one day ahead. This could suggest that weekend summer travelers would like the capability to plan ahead and reserve space but would also like the system to allow for last minute planning.

**Table 17: Other Attitudes toward Proposed Reservation System by Time of Day / Week Travel**

	All Summer Riders (n=7,659)	Peak Weekday (n=2,883)	Off-Peak Weekday (n=1,537)	Weekend (n=3,239)
	<b>The reservation system would inform people on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first served</b>			
<b>Net Agreement</b>	70%	<b>71%</b>	68%	<b>73%</b>
<b>Neutral</b>	13%	11%	15%	13%
<b>Net Disagreement</b>	17%	18%	18%	15%
	<b>Frequent users would be able to conveniently reserve a full week's travel with one visit to the reservation system</b>			
<b>Net Agreement</b>	56%	57%	55%	56%
<b>Neutral</b>	18%	16%	20%	19%
<b>Net Disagreement</b>	26%	27%	25%	25%
	<b>Some space should be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel</b>			
<b>Net Agreement</b>	47%	46%	45%	<b>50%</b>
<b>Neutral</b>	25%	24%	27%	23%
<b>Net Disagreement</b>	28%	30%	28%	27%

## Detailed Findings: Willingness to Pay for a Reservation

Respondents in both the winter and summer surveys were asked their willingness to pay a premium for a reservation ranging from 10 percent over the average fare paid on the route they were using to double the average fare. Each survey version showed the average fare paid by vehicle drivers on that route as a reference point. The average fare included in the route-specific questionnaire was computed as an average of the fare for a single ride ticket and the fare with a multi-ride ticket. As the discount for a multi-ride ticket is 20 percent of the single ride ticket, the average fare included on the questionnaire is 10 percent lower than the vehicle fare for a single ride ticket and 10 percent higher than that paid by those using a multi-ride card. Respondents were then asked to indicate their willingness to pay each of five fares, specific to the route they were on. Responses were recorded on a five-point scale ranging from “1” meaning “not at all willing” to “5” meaning “very willing.”

### Willingness to Pay Any Premium Level for a Reservation

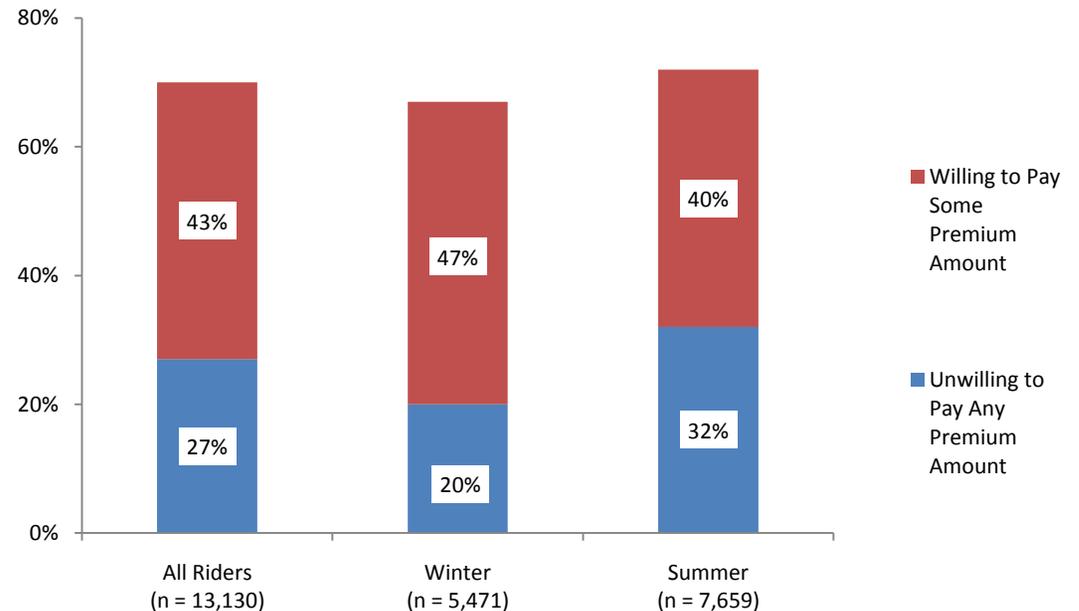
#### All Riders: Overall Willingness to Pay Any Premium Level for a Reservation

More than one out of four (27%) riders are **not** willing to pay any level of a premium for a reservation – that is, they said “not at all willing” to all five of the willingness to pay questions.

- Perhaps reflecting the higher fares in the summer as well as the unexpectedly high cost of gas this past summer, summer riders are significantly more likely than winter riders to be unwilling to pay any premium amount – 32 percent compared to 20 percent unwilling, respectively.

More than two out of five (43%) riders are willing to pay some level of premium – that is, they said they were “somewhat” or “very willing” to pay at least one of the premium levels.

**Figure 10: Overall Willingness to Pay Any Premium Level for a Reservation**



Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.

## Boarding Mode Analysis: Overall Willingness to Pay Any Premium Level for a Reservation

Vehicle drivers are more likely than their passengers and walk-on passenger counterparts to be willing to pay a premium amount.

- More than two out of five (44%) vehicle drivers are willing to pay some premium amount.

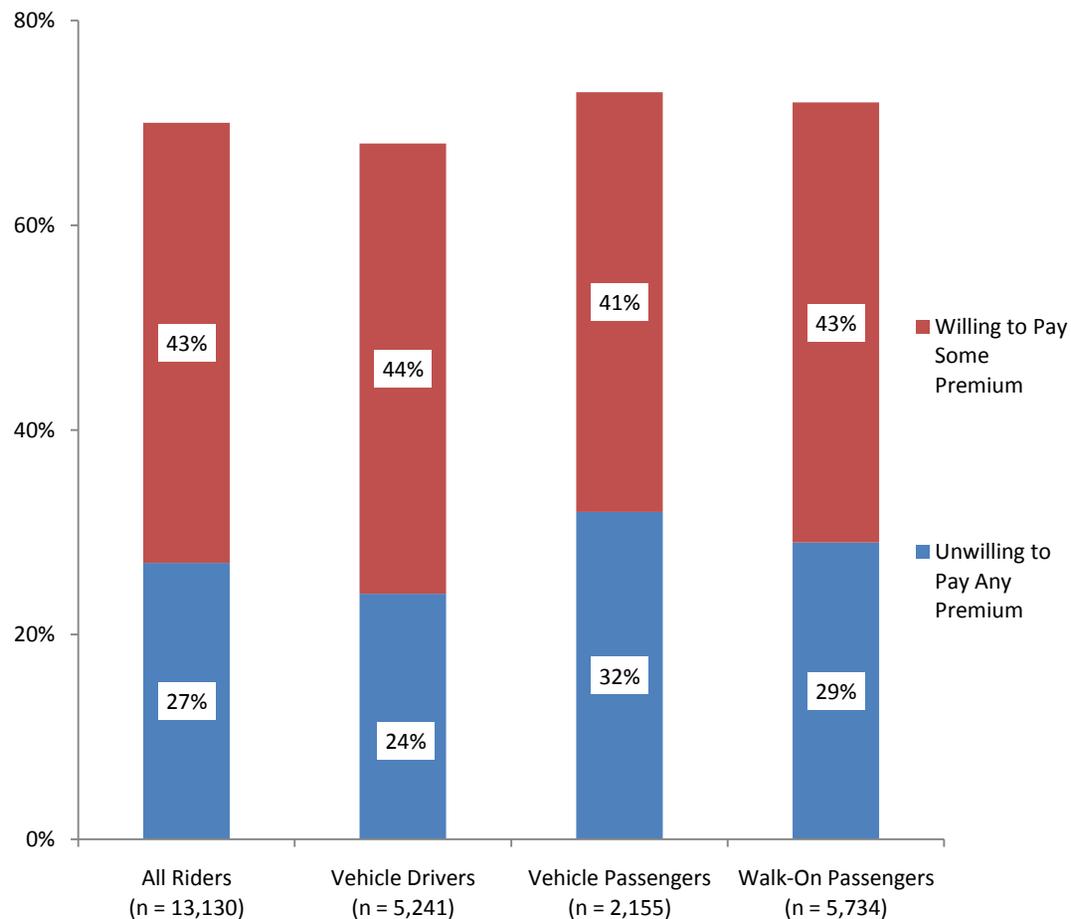
The same seasonal difference noted on the previous page holds true for all passenger types – that is, summer riders boarding by any mode are less willing to pay any premium level.

- Twenty-eight percent (28%) of summer vehicle drivers are unwilling to pay any premium compared to 18 percent of winter vehicle drivers.

**Table 18: Vehicle Drivers' Willingness to Pay Any Premium Level for a Reservation by Season**

	All Vehicle Drivers (n=5,241)	Winter (n=2,358)	Summer (n=2,883)
Unwilling to Pay Any Premium	24%	18%	<b>28%</b>
Willing to Pay Some Premium	44%	<b>47%</b>	41%

**Figure 11: Overall Willingness to Pay Any Premium Level for a Reservation by Boarding Mode**



Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.

## ***Route Level Analysis: Overall Willingness to Pay Any Premium Level for a Reservation***

There are relatively small differences in the percentage of riders who are unwilling to pay any premium across the routes.

- Riders on the three primarily recreational routes – Keystone / Port Townsend, Anacortes / San Juans and Anacortes / Sidney – are somewhat more likely to suggest that they are unwilling to pay any premium. This may reflect the awareness among riders on these routes that presently reservation fees are not charged.

Similarly, there are relatively small differences in the percentage of riders who are willing to pay a premium across the routes.

- Riders on the Anacortes / San Juan routes are the most willing to pay a premium for a reservation. Over half (53%) of all riders on this route say they are willing to pay a premium fare. The difference in overall willingness to pay between winter and summer riders is not statistically significant.
  - It is the non-recreational riders on this route that are influencing this higher than average willingness to pay a premium. Fifty-six percent (56%) of those traveling for trips other than recreation are willing to pay a premium compared to 51 percent of recreational travelers. This is most evident among winter riders – 61 percent of winter riders taking non-recreational trips would be willing to pay a premium for a reservation compared to 53 percent of summer riders.
- Nearly half (46%) of all Seattle / Bainbridge riders are willing to pay some premium level for a reservation. Significantly more winter riders on this route are willing to pay a premium – 51 percent for winter riders and 42 percent for summer riders.
  - This higher than average willingness to pay on this route is driven primarily by the commuters. Fifty-three percent (53%) of all Seattle / Bainbridge commuters are willing to pay a premium – 56 percent of winter riders and 50 percent of summer riders.

The Port Townsend / Keystone route provides some interesting insights into riders' willingness to pay a premium for a reservation. In essence, it serves as a pre / post test of a reservation system implementation on riders' willingness to pay.

- There are no differences in the percentage of Port Townsend / Keystone riders who are unwilling to pay any premium between the winter and summer data collection periods – 33 percent and 32 percent, respectively.
- The percentage of Port Townsend / Keystone riders who are willing to pay a premium decreased significantly between the two data collection periods – 50 percent and 38 percent, respectively. The reservation system on this route does not currently require a fee.

**Table 19: Overall Willingness to Pay Any Premium Level for a Reservation by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
	<b>All Riders</b>										
<b>Unwilling to Pay Any Premium</b>	27%	26%	25%	29%	28%	27%	27%	25%	<b>32%</b>	<b>31%</b>	33%
<b>Willing to Pay Some Premium</b>	43%	<b>46%</b>	42%	41%	41%	36%	41%	36%	43%	<b>53%</b>	42%
	<b>Winter Riders</b>										
<b>Unwilling to Pay Any Premium</b>	20%	19%	21%	23%	17%	19%	25%	14%	<b>33%</b>	22%	n.a.
<b>Willing to Pay Some Premium</b>	47%	<b>51%</b>	44%	42%	<b>51%</b>	35%	38%	41%	<b>50%</b>	<b>58%</b>	n.a.
	<b>Summer Riders</b>										
<b>Unwilling to Pay Any Premium</b>	32%	31%	27%	33%	<b>37%</b>	33%	28%	33%	32%	35%	<b>33%</b>
<b>Willing to Pay Some Premium</b>	40%	42%	40%	40%	34%	36%	<b>44%</b>	31%	38%	<b>51%</b>	42%
<p><i>Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.</i></p>											

## Time of Day / Week Travel Analysis: Overall Willingness to Pay Any Premium Level for a Reservation

Peak weekday and, to a lesser extent, weekend riders are more willing than off-peak weekday riders to suggest they would be willing to pay a premium for a reservation.

At the same time, weekend riders are more likely than peak weekday riders to say they are unwilling to pay any premium.

- The high percentage of weekend riders unwilling to pay any premium level is primarily driven by walk-on riders – 36 percent unwilling to pay. Only 24 percent of weekend vehicle drivers are unwilling to pay a premium.

**Table 20: Overall Willingness to Pay Any Premium Level for a Reservation by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=13,130)	Total Peak Weekday (n=6,192)	Peak Weekday			Total Off-Peak Weekday (n=3,278)	Off-Peak Weekday			Total Weekend (n=3,660)	Weekend		
			Vehicle Driver (n=2,219)	Vehicle Passenger (n=685)	Walk-On (n=3,288)		Vehicle Driver (n=1,512)	Vehicle Passenger (n=584)	Walk-On (n=1,182)		Vehicle Driver (n=1,510)	Vehicle Passenger (n=886)	Walk-On (n=1,264)
<b>All Riders</b>													
Unwilling to Pay Any Premium	27%	23%	20%	28%	23%	<b>30%</b>	25%	40%	30%	<b>29%</b>	24%	28%	36%
Willing to Pay Some Premium	43%	<b>46%</b>	46%	42%	47%	40%	42%	33%	40%	<b>44%</b>	44%	48%	40%
<b>Winter Riders</b>													
Unwilling to Pay Any Premium	20%	17%	15%	19%	18%	23%	20%	28%	27%	21%	18%	16%	29%
Willing to Pay Some Premium	47%	50%	49%	49%	51%	43%	47%	37%	40%	47%	45%	54%	42%
<b>Summer Riders</b>													
Unwilling to Pay Any Premium	32%	28%	25%	33%	28%	34%	29%	45%	32%	35%	30%	36%	40%
Willing to Pay Some Premium	40%	42%	42%	37%	44%	37%	38%	32%	41%	42%	44%	43%	40%

Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.

**Other Significant Results: Overall Willingness to Pay Any Premium Level for a Reservation by Primary Trip Purpose**

There are no significant differences in the percentage of riders who are willing to pay some premium amount for a reservation across the different types of trips.

There is one notable difference in the percentage of riders who are unwilling to pay any premium amount.

- Specifically those who travel for recreation trips are significantly more likely than those traveling for other trip purposes to say they are unwilling to pay for a reservation. Overall, 38 percent of all recreation travelers are unwilling to pay a premium – 29 percent in the winter and 40 percent in the summer.

**Table 21: Overall Willingness to Pay Any Premium Level for a Reservation by Trip Purpose**

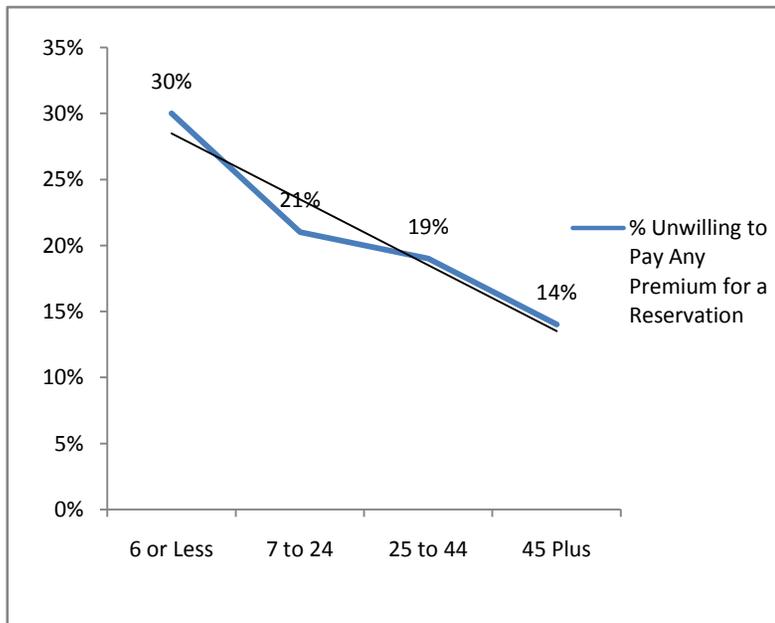
	All Riders (n=13,130)	Commute (n=4,905)	Personal/ Shopping (n=2,110)	Recreation (n=3,040)	Social (n=1,743)	Other (n=1,113)
<b>All Riders</b>						
Unwilling to Pay Any Premium	27%	20%	25%	<b>38%</b>	28%	26%
Willing to Pay Some Premium	43%	45%	44%	40%	44%	44%
<b>Winter Riders</b>						
Unwilling to Pay Any Premium	20%	15%	18%	<b>29%</b>	<b>26%</b>	17%
Willing to Pay Some Premium	47%	47%	48%	44%	45%	51%
<b>Summer Riders</b>						
Unwilling to Pay Any Premium	32%	24%	31%	<b>40%</b>	30%	33%
Willing to Pay Some Premium	40%	42%	39%	39%	44%	38%
<i>Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.</i>						

## Other Significant Results: Overall Willingness to Pay Any Premium Level for a Reservation by Frequency of Riding

Unwillingness to pay any premium level for a reservation is related to frequency of travel.

- As frequency of riding increases, the percentage of those unwilling to pay anything for a reservation decreases.

**Figure 12: Percentage Unwilling to Pay Any Premium for a Reservation by Number of One-Way Trips / Month**



**Table 22: Overall Willingness to Pay Any Premium Level for a Reservation by Frequency of Riding**

	All Riders (n=13,130)	6 or Less (n=4,733)	7 to 24 (n=3,121)	25 to 44 (n=2,673)	45 Plus (n=1,480)
<b>All Riders</b>					
Unwilling to Pay Any Premium	27%	<b>30%</b>	21%	19%	14%
Willing to Pay Some Premium	43%	45%	45%	45%	47%
<b>Winter Riders</b>					
Unwilling to Pay Any Premium	20%	<b>27%</b>	17%	16%	12%
Willing to Pay Some Premium	47%	48%	47%	47%	47%
<b>Summer Riders</b>					
Unwilling to Pay Any Premium	32%	<b>32%</b>	24%	22%	16%
Willing to Pay Some Premium	40%	44%	43%	42%	47%

*Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.*

**Other Significant Results: Overall Willingness to Pay Any Premium Level for a Reservation by Agreement / Disagreement with Policy to Have a Premium Fare**

While there is some relationship between riders' agreement or disagreement with the proposed policy to have customers with vehicle reservation pay a premium over the regular vehicle ticket price and their overall willingness to pay a premium, this relationship is not as clear-cut as might be expected.

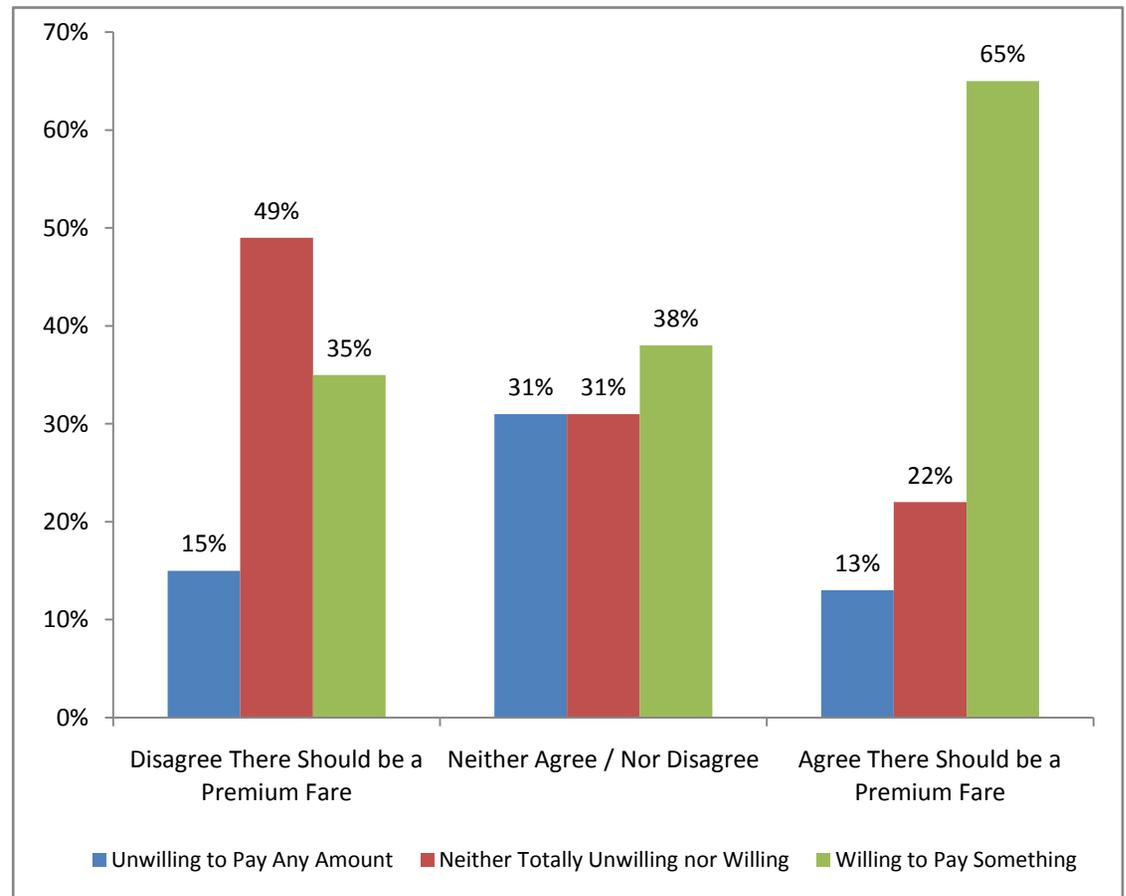
Clearly, those who agree there should be a premium fare are more willing to pay a premium than those that disagree.

- Nearly two-thirds (65%) of those who agree there should be a premium are willing to pay some premium amount.
- The balance says they are unwilling to pay anything (13%) or is neither willing nor unwilling or are somewhat unwilling to pay (22%). This would suggest that many riders agree that this should be a premium service but that they personally would not pay to use the service.

Conversely, more than one-third (35%) of those who disagree there should be a premium fare say they would be willing to pay something for a reservation. On the other hand, only 15 percent suggests they would be unwilling to pay any amount.

- This then suggests that while riders may not like the idea of having a premium fare, this does not necessarily mean that if a premium fare policy was in place they would never make a reservation or pay a fee.

**Figure 13: Overall Willingness to Pay Any Premium Level for a Reservation by Agreement / Disagreement with Policy to Have a Premium Fare**



Computed variable based on responses to question series regarding willingness to pay five premium levels for reservations. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.

## Amount of Premium Riders are Willing to Pay for a Reservation

As described on page 45, respondents were asked to indicate their willingness to pay five different premium amounts ranging from 10 percent more than the current average fare to double the current average fare. Responses were recorded on a five-point scale ranging from “1” meaning “not at all willing” to pay to “5” meaning “very willing” to pay.

In general when you directly ask a survey respondent the amount they would be willing to pay for something, they tend to under-report the actual amount they are willing to pay. By asking five separate questions, it is possible to estimate the amount that the majority of riders would feel is a “reasonable price” and hence the majority would most likely purchase the product or service – in this case, pay a premium for a reservation. In addition, it is possible to estimate the amount at which the majority of riders begin to feel the premium is “unreasonable” and hence would be unlikely to purchase the product or service or would do so infrequently. The analysis and graphs / tables on the following pages identify these two amounts as follows:

1. Reasonable Premium Amount: This is estimated by identifying the intersection where an equal percentage of riders are “very willing” versus “not willing” to pay a premium fare for a reservation. Since most survey respondents will under-report their actual willingness, this intersection point would be the point where the majority of riders would be willing to pay a premium.
2. Unreasonable Premium Amount: This is estimated by identifying the intersection point where an equal percent of riders are “willing” versus “not willing” to pay a premium for a reservation. This intersection point represents the point where half of all riders would be unwilling to pay and those willing to do so are likely to use the system less frequently than if the premium was lower.

The amounts at the intersection points are estimates based on the intersection point between the given premium levels. This analysis is most useful in giving an impression of the sensitivity to different price points rather than identifying actual price points.

## All Riders: Amount of Premium Willing to Pay for a Reservation

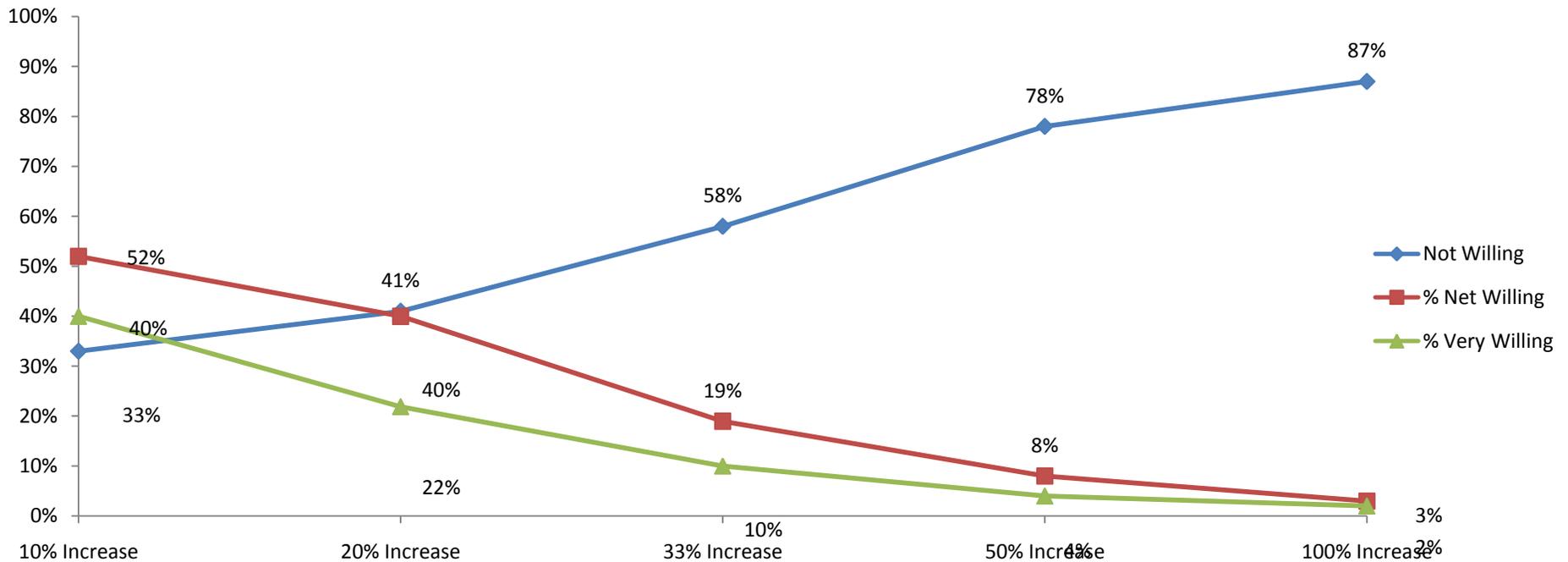
More than half (52%) of all riders are willing to pay a premium of 10 percent – 40 percent is “very willing” and 12 percent is “somewhat willing.”

- This holds true for both winter and summer travelers.

The point at which an equal percentage of riders would appear to be “very willing” versus “not willing” to pay a premium is slightly higher than 10 percent, providing further evidence to support to riders’ willingness to pay some premium over what they currently pay.

- The point at which an equal percentage is “willing” versus “not willing” to pay is 20 percent. Given the tendency for survey respondents when asked a direct question about the amount they would they would be willing to pay to deflate the actual amount they would pay, this analysis would suggest that riders would consider a 20 percent premium to be reasonable.

**Figure 14: Amount of Premium Willing to Pay for a Reservation**



To what extent would you be willing to pay each of the following additional premiums over the [average vehicle fare for route] for a guaranteed space on the ferry for your vehicle at a specific boarding time for your typical trip? Premium levels shown were 10%, 20%, 33%, 50%, and 100% of the average vehicle fare for that route. Actual dollar amounts were shown; not the percentage increase.

*[Blank page inserted for pagination purposes.]*

## Boarding Mode Analysis: Amount of Premium Willing to Pay for a Reservation

While vehicle drivers appear to be somewhat more sensitive to the amount of premium they would be willing to pay for a reservation, the differences between vehicle drivers, vehicle passengers, and walk-on passengers is not as great as might be expected.

- As noted on the previous page, the point at which an equal percentage of all riders are “willing” and “not willing” to pay a premium is 20 percent over the current average vehicle fare.
- For vehicle drivers, that point of intersection would be somewhat less than the 20 percent level but well over the 10 percent level.

**Table 23: Amount of Premium Willing to Pay for a Reservation by Boarding Mode**

	All Riders (n=13,130)	Vehicle Drivers (n=5,241)	Vehicle Passengers (n=2,155)	Walk-On Passengers (n=5,734)
<b>10% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	52%	51%	52%	53%
% Net Unwilling	33%	35%	32%	30%
<b>20% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	40%	38%	41%	42%
% Net Unwilling	41%	44%	41%	39%
<b>33% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	19%	18%	20%	19%
% Net Unwilling	58%	61%	57%	55%
<b>50% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	8%	8%	8%	8%
% Net Unwilling	78%	80%	77%	77%
<b>100% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	3%	3%	4%	3%
% Net Unwilling	87%	88%	86%	85%

*To what extent would you be willing to pay each of the following additional premiums over the [average vehicle fare for route] for a guaranteed space on the ferry for your vehicle at a specific boarding time for your typical trip? Premium levels shown were 10%, 20%, 33%, 50%, and 100% of the average vehicle fare for that route. Actual dollar amounts were shown; not the percentage increase.*

## ***Route Level Analysis: Amount of Premium Willing to Pay for a Reservation***

Riders on the Fautleroy / Vashon and Point Defiance / Tahlequah routes are clearly the most sensitive in terms of the level of premium they would be willing to pay.

- The level of premium at which an equal percentage of riders suggest they are “willing” versus “not willing” to pay a premium would be at a point slightly less than 10 percent for Point Defiance / Tahlequah riders and just slightly more than 10 percent for Fautleroy / Vashon riders.

Riders on routes that would be willing to pay more than a 10 percent premium but less than a 20 percent premium include: Seattle / Bremerton, Edmonds / Kingston, Fautleroy / Southworth, and Anacortes / Sidney.

- It is interesting to note that currently Anacortes / Sidney riders do not pay a reservation fee. However, this analysis clearly shows that they would be willing to pay some amount between 10 and 20 percent over the current vehicle fare.

Riders on the Mukilteo / Clinton and Seattle / Bainbridge routes suggest that a premium amount at or just slightly under 20 percent might be considered reasonable.

- For Mukilteo / Clinton riders, the point at which an equal percentage of riders would be “willing” versus “unwilling” to pay a premium would be only slightly less than 20 percent.
- For Seattle / Bainbridge riders, the point at which an equal percentage of riders would be “willing” versus “unwilling” to pay a premium would be somewhat higher than 20 percent. However, for vehicle driver, the amount of premium they would be willing to pay would be less than 20 percent. A greater percentage of Seattle / Bainbridge drivers would be unwilling versus willing to pay a 20 percent premium over the current vehicle fare – 43 percent compared to 39 percent, respectively.

Riders on the Port Townsend / Keystone and Anacortes / San Juans routes would be willing to pay more than a 20 percent but less than a 33 percent premium.

- Riders on the Port Townsend / Keystone route appear to feel that an amount slightly higher than 20 percent could still be considered reasonable. However, this is driven primarily by the winter riders where 50 percent said they would be willing to pay a 20 percent premium and 22 percent say they would be unwilling. Summer riders were clearly influenced by the launch of a reservation system that had no fee. Even here, however, only a slightly higher percentage of riders suggest they are unwilling versus willing to pay a 20 percent premium – 42 percent unwilling compared to 37 percent willing.
- Significantly more riders on the Anacortes / San Juans routes say they would be willing versus unwilling to pay a 20 percent premium – 57 percent compared to 25 percent, respectively. An even greater percentage of summer riders suggest they would be willing versus unwilling to pay a 20 percent premium – 60 percent compared to 21 percent, respectively. In fact, only a slightly higher percentage of summer riders suggests they are unwilling versus willing to pay a 33 percent premium – 39 percent compared to 33 percent, respectively. This would suggest that Anacortes / San Juans riders would clearly value a reservation system and would be willing to pay for the confidence of having a guaranteed space on the ferry at a specific time.

**Table 24: Amount of Premium Willing to Pay for a Reservation by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>10% Increase Over Current Average Vehicle Fare</b>											
% Net Willing	52%	56%	47%	50%	51%	<b>43%</b>	50%	<b>41%</b>	51%	70%	54%
% Net Unwilling	33%	31%	34%	34%	35%	<b>40%</b>	35%	<b>42%</b>	28%	18%	25%
<b>20% Increase Over Current Average Vehicle Fare</b>											
% Net Willing	40%	44%	37%	38%	41%	29%	35%	29%	43%	57%	31%
% Net Unwilling	41%	39%	43%	43%	43%	47%	45%	56%	34%	25%	51%
<b>33% Increase Over Current Average Vehicle Fare</b>											
% Net Willing	19%	20%	16%	19%	21%	13%	12%	8%	18%	29%	8%
% Net Unwilling	58%	56%	59%	60%	58%	65%	65%	64%	54%	46%	69%
<b>50% Increase Over Current Average Vehicle Fare</b>											
% Net Willing	8%	7%	7%	7%	10%	5%	6%	2%	12%	16%	4%
% Net Unwilling	78%	79%	79%	79%	77%	80%	81%	84%	75%	71%	82%
<b>100% Increase Over Current Average Vehicle Fare</b>											
% Net Willing	3%	3%	4%	3%	4%	2%	2%	1%	6%	7%	2%
% Net Unwilling	87%	89%	84%	87%	86%	86%	89%	88%	79%	84%	84%

*To what extent would you be willing to pay each of the following additional premiums over the [average vehicle fare for route] for a guaranteed space on the ferry for your vehicle at a specific boarding time for your typical trip? Premium levels shown were 10%, 20%, 33%, 50%, and 100% of the average vehicle fare for that route. Actual dollar amounts were shown; not the percentage increase.*

## Detailed Findings: Preferred Vehicle Lane

A second strategy under consideration for moving vehicles is the implementation of a preferred boarding lane. This was tested in the winter data collection period only. It was described as a “preferred vehicle lane that would allow some riders with a specific pass or ticket to move more quickly through the ticketing and loading process.” They were then asked the extent to which they agree or disagree with several statements describing the system. Follow-up questions then queried the frequency with which they would use the system and their willingness to pay a premium over the average vehicle fare on the route.

### Attitudes toward Preferred Vehicle Lanes

#### All Winter Riders: Overall Attitudes toward a Preferred Vehicle Lane

It is clear from the mean for each statement that winter riders have mixed or negatively leaning reactions to a preferred boarding lane system.

- For all statements, those that disagree do so strongly. That is, two to three times as many riders “strongly disagree” as “somewhat disagree.”
- On the other hand, those that agree have decidedly mixed levels of agreement.

One item of note is that winter riders are somewhat more likely to agree that a preferred boarding lane would give them faster access to the vehicle waiting / loading area rather than give them priority to board regardless of when they arrive. That is, they appear to see it as a means for regular riders with pre-paid fares or those that pay to move more quickly through the vehicle queuing process, rather than as a system that would allow regular riders or those willing to pay the ability to jump the queue and board ahead of those who have been waiting.

**Table 25: Overall Attitudes toward a Preferred Vehicle Lane**

	Users of Lanes with Pre-Paid Tickets are Allowed Faster Access to Dock Holding Area	Regular Riders with Pre-Paid Tickets are Only Ones Who Can Use Lanes	Users of Lanes with Pre-Paid Tickets Get Priority Boarding	Customers Using the Preferred Boarding Lane Should Pay a Premium	A Specific But Limited Amount of Space Should be Set Aside for Lane Users
<b>Net Agreement</b>	46%	45%	42%	41%	41%
<b>Strongly Agree</b>	21%	24%	19%	21%	17%
<b>Somewhat Agree</b>	25%	21%	23%	20%	24%
<b>Neutral</b>	22%	20%	24%	21%	21%
<b>Somewhat Disagree</b>	8%	10%	9%	9%	9%
<b>Strongly Disagree</b>	24%	25%	25%	29%	28%
<b>Net Disagreement</b>	32%	35%	34%	38%	37%
<b>Mean</b>	3.12	3.11	3.03	2.95	2.92

Another strategy is to have a preferred vehicle lane that would allow some riders with a specific pass or ticket to move more quickly through the ticketing and loading process. To what extent do you agree or disagree with each of the following statements about this strategy.

Mean is based on a five-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees.” Three would be the mid-point.

Base: All Winter Survey Respondents (n=5,471)

## Boarding Mode Analysis: Attitudes toward a Preferred Vehicle Lane

As would be expected, winter vehicle drivers and, to a lesser extent, vehicle passengers are more likely to agree with those statements that provide them with a benefit for using the priority boarding lane. Specifically they are more likely to agree that. . .

- Users of lanes with pre-paid tickets are allowed faster access to dock holding area.
- Regular riders with pre-paid tickets are the only ones who can use the lanes.
- Preferred vehicle lanes give users with pre-paid tickets priority boarding.

On the other hand, winter vehicle drivers are more likely to disagree that customers using the preferred lane should pay a premium.

**Table 26: Attitudes toward a Preferred Vehicle Lane by Boarding Mode**

	All Winter Riders (n=5,471)	Vehicle Drivers (n=2,358)	Vehicle Passengers (n=618)	Walk-On Passengers (n=2,495)
<b>Users of Lanes with Pre-Paid Tickets are Allowed Faster Access to Dock Holding Area</b>				
Net Agreement	46%	<b>47%</b>	<b>48%</b>	43%
Neutral	22%	20%	19%	26%
Net Disagreement	32%	32%	34%	31%
<b>Regular Riders with Pre-Paid Tickets are Only Ones Who Can Use Lanes</b>				
Net Agreement	45%	<b>48%</b>	45%	44%
Neutral	20%	19%	18%	22%
Net Disagreement	35%	34%	37%	34%
<b>Users of Lanes with Pre-Paid Tickets Get Priority Boarding</b>				
Net Agreement	42%	<b>44%</b>	<b>45%</b>	37%
Neutral	24%	22%	21%	29%
Net Disagreement	34%	34%	34%	34%
<b>Customers Using the Preferred Boarding Lane Should Pay a Premium</b>				
Net Agreement	41%	39%	43%	41%
Neutral	21%	19%	19%	<b>24%</b>
Net Disagreement	38%	<b>41%</b>	38%	35%
<b>A Specific But Limited Amount of Space Should be Set Aside for Lane Users</b>				
Net Agreement	41%	41%	43%	40%
Neutral	21%	19%	20%	<b>24%</b>
Net Disagreement	37%	39%	37%	36%

Another strategy is to have a preferred vehicle lane that would allow some riders with a specific pass or ticket to move more quickly through the ticketing and loading process. To what extent do you agree or disagree with each of the following statements about this strategy.

## ***Route Level Analysis: Attitudes toward Preferred Vehicle Lanes***

With a few exceptions, attitudes toward preferred vehicle lanes are similar across routes.

- Mukilteo / Clinton winter riders are more likely than riders on other routes to agree that: users of the lane should have faster access, they should have priority boarding, and they should be restricted to regular riders. These findings are consistent with the qualitative research and, in part, reflect the nature of boarding on the Mukilteo side. At the same time, Mukilteo / Clinton riders are somewhat more likely than winter riders on other routes to suggest that they agree that there should be a premium for this benefit.
- Edmonds / Kingston and Seattle / Bainbridge winter riders are more likely to disagree that vehicles using the preferred lane should get priority boarding. On the other hand, they are more likely to agree that those that use the lane should pay a premium. This also is consistent with the focus group research where some participants stated they would be willing to pay for this benefit although they were ambivalent if it should be offered.
- Fauntleroy / Vashon winter riders are more likely to agree that vehicles using the preferred lane should have priority. However, they are the least likely to agree that users of these lanes should pay a premium for this benefit.

Opinions are most divided as to whether there should be a premium for using a preferred vehicle lane.

- Winter riders on both Anacortes routes are the most likely to agree that there should be a premium for using this service.
- Those on Seattle / Bainbridge, Edmonds / Kingston, and Mukilteo / Clinton routes are also more likely to agree there should be a premium.
- As stated above, winter riders on the Fauntleroy / Vashon route are more likely than others to disagree (49%).
- Winter riders on the Point Defiance / Tahlequah route are the most likely to disagree (55%).

**Table 27: Other Attitudes toward a Preferred Vehicle Lane by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Users of Lanes with Pre-Paid Tickets are Allowed Faster Access to Dock Holding Area</b>										
Net Agreement	46%	47%	40%	45%	<b>54%</b>	45%	40%	39%	34%	44%
Neutral	22%	21%	<b>27%</b>	21%	17%	24%	20%	18%	31%	32%
Net Disagreement	32%	32%	33%	34%	29%	31%	40%	43%	35%	24%
<b>Regular Riders with Pre-Paid Tickets are Only Ones Who Can Use Lanes</b>										
Net Agreement	45%	45%	39%	44%	<b>52%</b>	48%	46%	44%	36%	<b>50%</b>
Neutral	20%	19%	<b>27%</b>	19%	18%	17%	17%	16%	28%	22%
Net Disagreement	35%	36%	34%	36%	30%	36%	37%	40%	36%	28%
<b>Users of Lanes with Pre-Paid Tickets Get Priority Boarding</b>										
Net Agreement	42%	40%	36%	42%	<b>49%</b>	<b>46%</b>	34%	34%	34%	<b>47%</b>
Neutral	24%	24%	<b>31%</b>	23%	23%	20%	24%	21%	31%	26%
Net Disagreement	34%	<b>36%</b>	33%	<b>36%</b>	28%	34%	<b>42%</b>	<b>45%</b>	35%	27%
<b>Customers Using the Preferred Boarding Lane Should Pay a Premium</b>										
Net Agreement	41%	<b>44%</b>	36%	<b>44%</b>	<b>42%</b>	30%	37%	28%	<b>53%</b>	<b>44%</b>
Neutral	21%	20%	<b>27%</b>	18%	18%	21%	<b>26%</b>	17%	23%	<b>28%</b>
Net Disagreement	38%	36%	37%	38%	39%	<b>49%</b>	37%	<b>55%</b>	24%	28%
<b>A Specific But Limited Amount of Space Should be Set Aside for Lane Users</b>										
Net Agreement	41%	41%	40%	41%	44%	35%	37%	34%	44%	<b>51%</b>
Neutral	21%	20%	28%	20%	20%	18%	24%	14%	26%	24%
Net Disagreement	37%	39%	32%	39%	36%	<b>47%</b>	39%	<b>52%</b>	30%	25%
<p><i>Another strategy is to have a preferred vehicle lane that would allow some riders with a specific pass or ticket to move more quickly through the ticketing and loading process. To what extent do you agree or disagree with each of the following statements about this strategy.</i></p>										

## Willingness to Pay Any Premium Level to Use a Preferred Vehicle Lane

Respondents in the March survey were asked their willingness to pay a premium to use a preferred vehicle lane ranging from 10 percent over the average fare paid on the route they were using to double the average fare. Each survey version showed the average fare paid by vehicle drivers on that route as a reference point. The fare was computed by averaging the fare for a single ride ticket and the fare with a multi-ride ticket. Therefore, the fare shown as a reference point was 10 percent below the vehicle fare for a single-ride ticket but 10 percent higher than that paid by those using a multi-ride card. Respondents were then asked to indicate their willingness to pay each of five fares, specific to the route they were on. Responses were recorded on a five-point scale ranging from “1” meaning “not at all willing” to “5” meaning “very willing.”

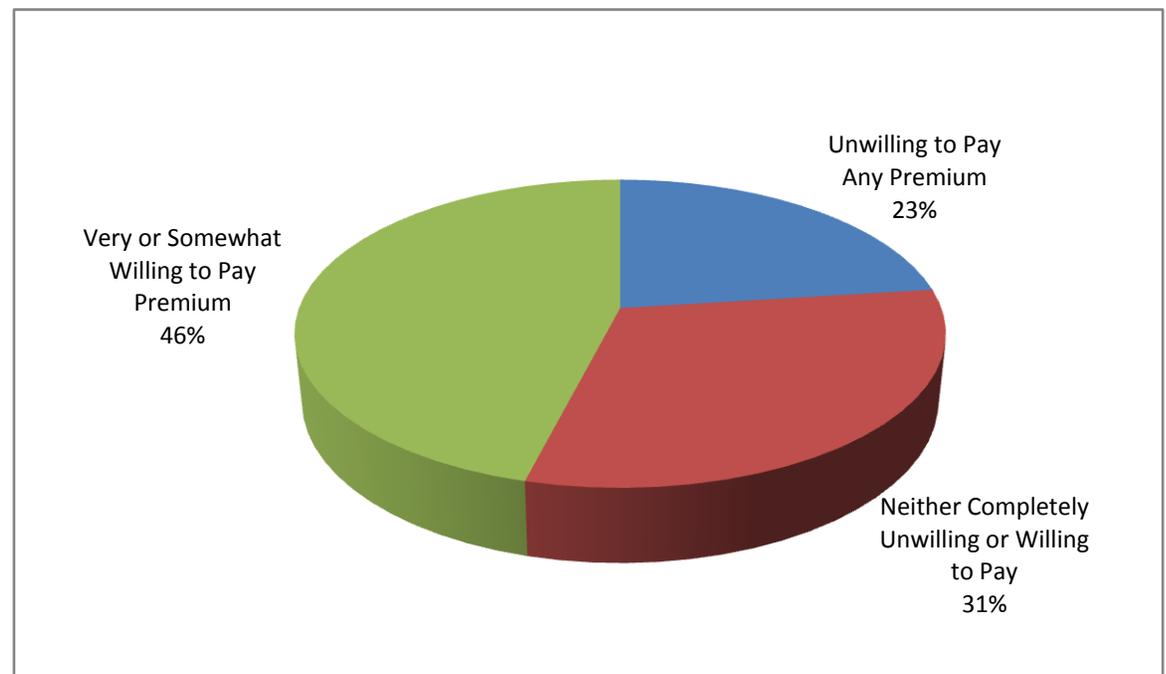
### All Winter Riders: Overall Willingness to Pay Any Premium Level to Use a Preferred Vehicle Lane

Less than one out of four (23%) winter riders are **not** willing to pay any premium amount for a preferred vehicle lane – that is, they said they are “not at all willing” to pay any of five premium levels over the current average vehicle fare for the route they ride.

More than two out of five (46%) winter riders are willing to pay some level of premium – that is, they said they were “somewhat” or “very willing” to pay at least one of the premium levels.

These figures are nearly the same as those given by winter riders for overall willingness to pay a premium for a reservation.

**Figure 15: Overall Willingness to Pay Any Premium Level to Use a Preferred Vehicle Lane**



*Computed variable based on responses to question series regarding willingness to pay five premium levels for using a preferred vehicle lane.*

*Base: Winter Riders (n=5,471)*

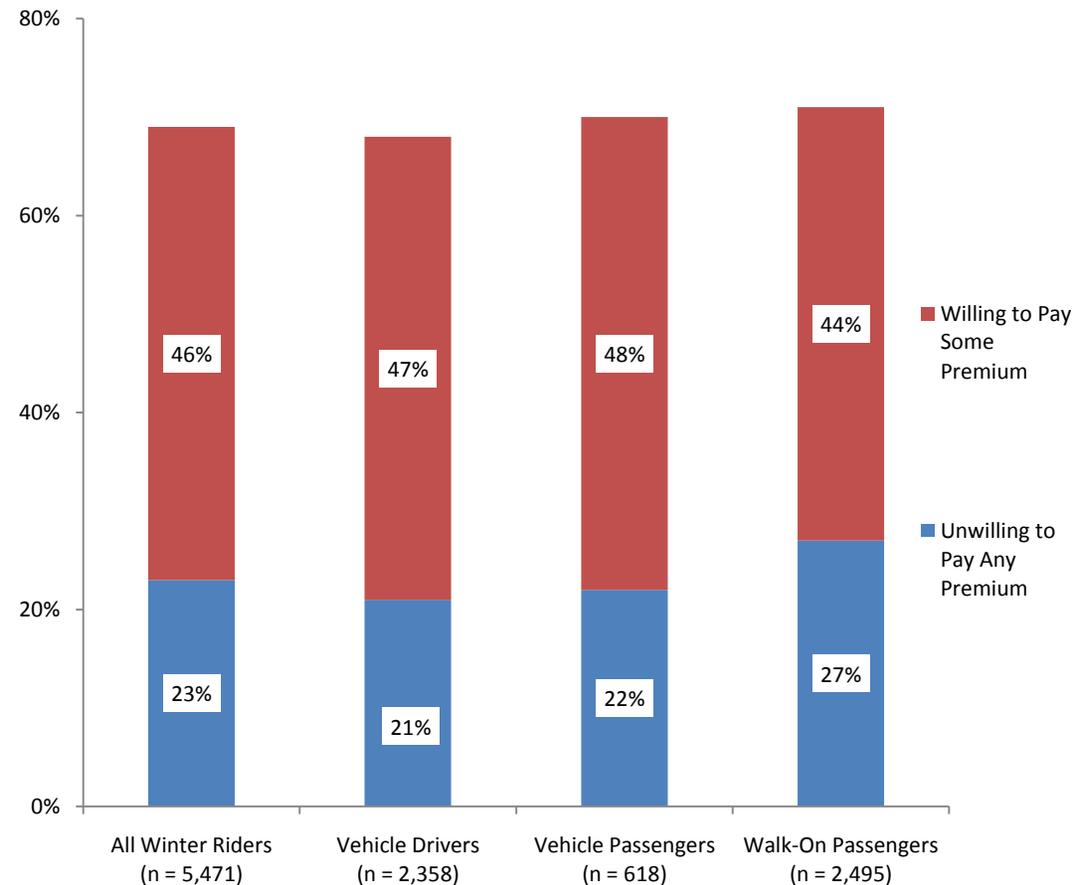
## Boarding Mode Analysis: Overall Willingness to Pay Any Premium Level to Use a Preferred Vehicle Lane

Winter vehicle drivers are less likely than walk-on passengers to suggest they are unwilling to pay any premium amount for the ability to use a preferred vehicle lane.

- Only 21 percent of vehicle drivers are completely unwilling to pay a premium compared to 27 percent of walk-on passengers.

On the other hand, there are no differences in the percentage of riders boarding by different modes who are very or somewhat willing to pay a premium.

**Figure 16: Overall Willingness to Pay Any Premium Level to Use a Preferred Vehicle Lane by Boarding Mode**



Computed variable based on responses to question series regarding willingness to pay five premium levels for preferred vehicle lane. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.

## Route Level Analysis: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane

With two exceptions, there are relatively small differences in the percentage of winter riders who are unwilling to pay any premium across the routes.

- Winter riders on the Mukilteo / Clinton and Point Defiance / Tahlequah routes are least likely to say they are unwilling to pay any premium for a preferred vehicle lane – 17 and 14 percent, respectively.

At the same time, 54 percent of Mukilteo / Clinton winter riders say they are very or somewhat willing to pay a premium.

- Winter riders on the Anacortes / San Juans and, to a lesser extent, Seattle / Bainbridge are also more likely than riders on other routes to suggest they would be willing to pay a premium fare – 55 and 49 percent, respectively.

**Table 28: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Unwilling to Pay Any Premium</b>	23%	23%	23%	26%	<b>17%</b>	25%	31%	<b>14%</b>	36%	27%
<b>Willing to Pay Some Premium</b>	46%	<b>49%</b>	44%	42%	<b>54%</b>	35%	32%	40%	42%	<b>55%</b>

*Computed variable based on responses to question series regarding willingness to pay five premium levels for a preferred vehicle lane. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.*

## Time of Day / Week Travel Analysis: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane

Peak weekday and weekend winter riders are more willing than off-peak weekday riders to suggest they would be willing to pay a premium for a preferred vehicle lane.

- Nearly half of peak weekday (48%) and weekend (47%) winter riders are willing to pay some premium amount.
- At the same time, a greater percentage of weekend riders than peak weekday winter riders – 24 percent compared to 20 percent, respectively – suggest they are unwilling to pay any premium.

This would suggest that while winter riders generally would prefer to not pay a premium for such a system, most recognize that one could be necessary.

**Table 29: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane by Time of Day / Week Travel and Boarding Mode**

	All Riders (n=5,471)	Total Peak Weekday (n=2,987)	Peak Weekday			Total Off-Peak Weekday (n=1,297)	Off-Peak Weekday			Total Weekend (n=1,187)	Weekend		
			Vehicle Driver (n=1,156)	Vehicle Passenger (n=239)	Walk-On (n=1,592)		Vehicle Driver (n=619)	Vehicle Passenger (n=157)	Walk-On (n=521)		Vehicle Driver (n=583)	Vehicle Passenger (n=222)	Walk-On (n=382)
Unwilling to Pay Any Premium	23%	20%	19%	20%	20%	<b>27%</b>	23%	32%	31%	<b>24%</b>	21%	17%	35%
Willing to Pay Some Premium	46%	<b>48%</b>	48%	51%	47%	44%	48%	36%	40%	<b>47%</b>	44%	55%	43%

*Computed variable based on responses to question series regarding willingness to pay five premium levels for a preferred vehicle lane. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.*

**Other Significant Results: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane by Primary Trip Purpose**

While all winter riders are more willing to pay a premium than not across all trip purpose segments, those traveling for recreation and, to a lesser extent, to visit friends and family are more likely than other trip purpose segments to suggest they would be unwilling to pay a premium for a preferred vehicle lane.

- One out of three (34%) winter recreational travelers would not pay; 28 percent of those visiting friends and family would not pay.

On the other hand, nearly (49%) of winter riders traveling for commute purposes are willing to pay some level of premium.

**Table 30: Overall Willingness to Pay Any Premium Level for a Preferred Vehicle Lane by Trip Purpose**

	Winter Riders (n=5,471)	Commute (n=2,547)	Personal/ Shopping (n=942)	Recreation (n=656)	Social (n=693)	Other (n=505)
Unwilling to Pay Any Premium	23%	17%	22%	<b>34%</b>	<b>28%</b>	22%
Willing to Pay Some Premium	46%	<b>49%</b>	48%	43%	44%	46%

*Computed variable based on responses to question series regarding willingness to pay five premium levels for a preferred vehicle lane. Columns do not sum to 100 percent; the remaining category (not shown) includes those saying they are somewhat unwilling to pay a premium or were neutral.*

## **Amount of Premium Winter Riders are Willing to Pay to Use a Preferred Vehicle Lane**

As described on page 63, respondents were asked to indicate their willingness to pay five different premium amounts to use a preferred vehicle lane ranging from 10 percent more than the current average fare to double the current average fare. Responses were recorded on a five-point scale ranging from “1” meaning “not at all willing” to pay to “5” meaning “very willing” to pay.

As discussed for willingness to pay for a reservation system, when a survey respondent is directly asked for an amount they are willing to pay for something, they tend to under-report the actual amount they are willing to pay. By asking five separate questions, it is possible to estimate the amount that the majority of riders would feel is a “reasonable price” and hence the majority would most likely purchase the product or service – in this case, pay a premium for a preferred vehicle lane. In addition, it is possible to estimate the amount at which the majority of riders begin to feel the premium is “unreasonable” and hence would be unlikely to purchase the product or service or would do so infrequently. The analysis and graphs / tables on the following pages identify these two amounts as follows:

1. **Reasonable Premium Amount:** This is estimated by identifying the intersection where an equal percentage of riders are “very willing” versus “not willing” to pay a premium fare for the ability to use a preferred vehicle lane. Since most survey respondents will under-report their actual willingness, this intersection point would be the point where the majority of riders would be willing to pay a premium.
2. **Unreasonable Premium Amount:** This is estimated by identifying the intersection point where an equal percent of riders are “willing” versus “not willing” to pay a premium for the ability to use a preferred vehicle lane. This intersection point represents the point where half of all riders would be unwilling to pay and those willing to do so are likely to use the system less frequently than if the premium was lower.

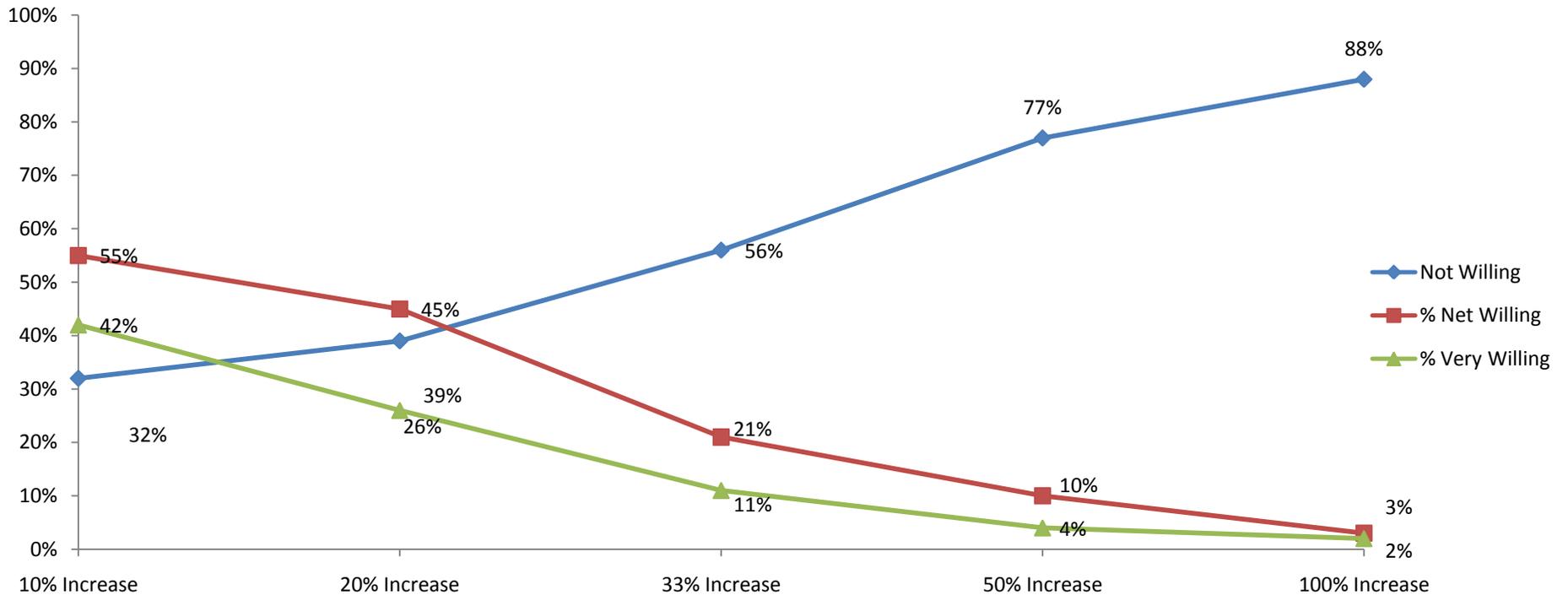
The amounts at the intersection points are estimates based on the intersection point between the given premium levels. This analysis is most usual in giving an impression of the sensitivity to different price points rather than identifying actual price points.

## All Winter Riders: Amount of Premium Winter Riders are Willing to Pay for a Preferred Vehicle Lane

The amount of a premium that winter riders suggest they are willing to pay is slightly higher than the amount they would be willing to pay for the vehicle reservation system.

- The point at which an equal percentage of winter riders suggest that they are “very willing” versus “not willing” to pay a premium to use a preferred vehicle lane is approximately halfway between a 10 and 20 percent premium over the average fare. The amount winter riders are willing to pay for a reservation is only slightly higher than 10 percent.
- The point at which an equal percentage of winter riders suggest that they are “willing” versus “not willing” is slightly over 20 percent. The amount for a reservation premium is exactly 20 percent.

**Figure 17: Amount of Premium Willing to Pay a Premium to Use a Preferred Vehicle Lane**



To what extent would you be willing to pay each of the following additional premiums over the [average vehicle fare for route] to use a preferred vehicle lane for your typical trip? Premium levels shown were 10%, 20%, 33%, 50%, and 100% of the average vehicle fare for that route. Actual dollar amounts were shown; not the percentage increase.

## Boarding Mode Analysis: Amount of Premium Winter Riders are Willing to Pay to Use a Preferred Vehicle Lane

Winter vehicle drivers are more sensitive to paying a premium than vehicle and walk-on passengers.

- The point at which an equal percentage of all winter riders are “willing” and “not willing” to pay a premium is slightly higher than 20 percent.
- For winter vehicle drivers, that point of intersection is somewhat less than the 20 percent level but well over the 10 percent level.

**Table 31: Amount of Premium Willing to Pay to Use a Preferred Vehicle Lane by Boarding Mode**

	All Winter Riders (n=5,471)	Vehicle Drivers (n=2,358)	Vehicle Passengers (n=618)	Walk-On Passengers (n=2,495)
<b>10% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	55%	55%	57%	53%
% Net Unwilling	32%	33%	31%	31%
<b>20% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	45%	44%	50%	44%
% Net Unwilling	39%	42%	37%	37%
<b>33% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	21%	21%	24%	20%
% Net Unwilling	56%	57%	56%	55%
<b>50% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	10%	10%	10%	9%
% Net Unwilling	77%	79%	77%	74%
<b>100% Increase Over Current Average Vehicle Fare</b>				
% Net Willing	3%	3%	4%	3%
% Net Unwilling	88%	89%	88%	86%

*To what extent would you be willing to pay each of the following additional premiums over the [average vehicle fare for route] to use a preferred vehicle lane for your typical trip? Premium levels shown were 10%, 20%, 33%, 50%, and 100% of the average vehicle fare for that route. Actual dollar amounts were shown; not the percentage increase.*

## Detailed Findings: High Occupancy Toll (HOT) Lane

In the winter survey, respondents were asked to provide feedback on a High Occupancy Toll (HOT) lane. This is a relatively new concept in transportation demand management, notably in the United States. The concept was described as a program in which only vehicles with two or more persons would be allowed to board at the posted fares during peak travel periods. Single occupant vehicles would have to pay a premium fare to board during these peak periods. Respondents were asked the extent to which they agree or disagree that WSF should implement this kind of program.

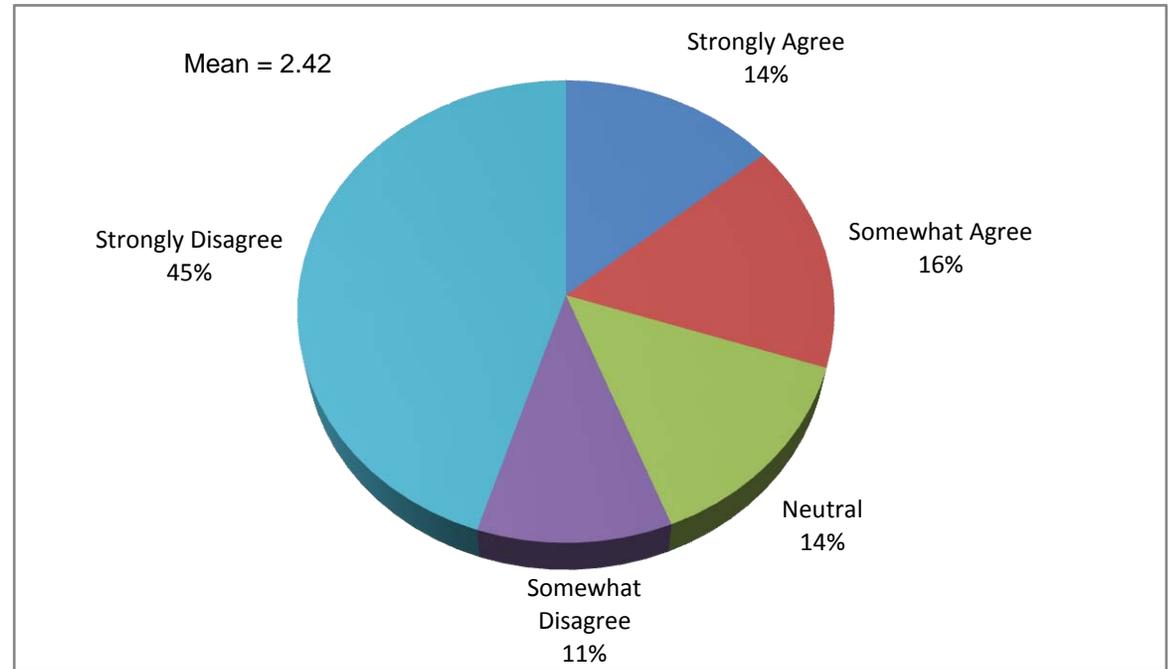
### All Winter Riders: Overall Attitudes toward Strategy Requiring Single-Occupant Vehicle Drivers to Pay a Higher Fare during Peak Travel Times

WSF winter riders clearly have very negative attitudes toward the idea of a high-occupancy vehicle lane – described as requiring single-occupant vehicle drivers to pay a premium fare to board during peak travel periods.

- The majority of winter riders (56%) disagree with the idea of requiring single occupant vehicle drivers who drive on the ferry during peak periods to pay a higher fare – 45 percent “strongly disagrees.”
- It is noteworthy that that the number of winter riders who “strongly disagrees” (45%) is three times greater than the number of riders who “strongly agrees” (14%), clearly indicating the strength of their sentiments against this proposal.

The results are found to vary by mode and route and are discussed on the following pages.

**Figure 18: Overall Attitudes toward Strategy Requiring Single-Occupant Vehicle Drivers to Pay a Higher Fare during Peak Travel Times**



Question: To what extent do you agree or disagree WSF should institute a High Occupancy Toll (HOT) program?  
Mean based on 5-point where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is 3.  
Base: Winter Riders (n=5,471)

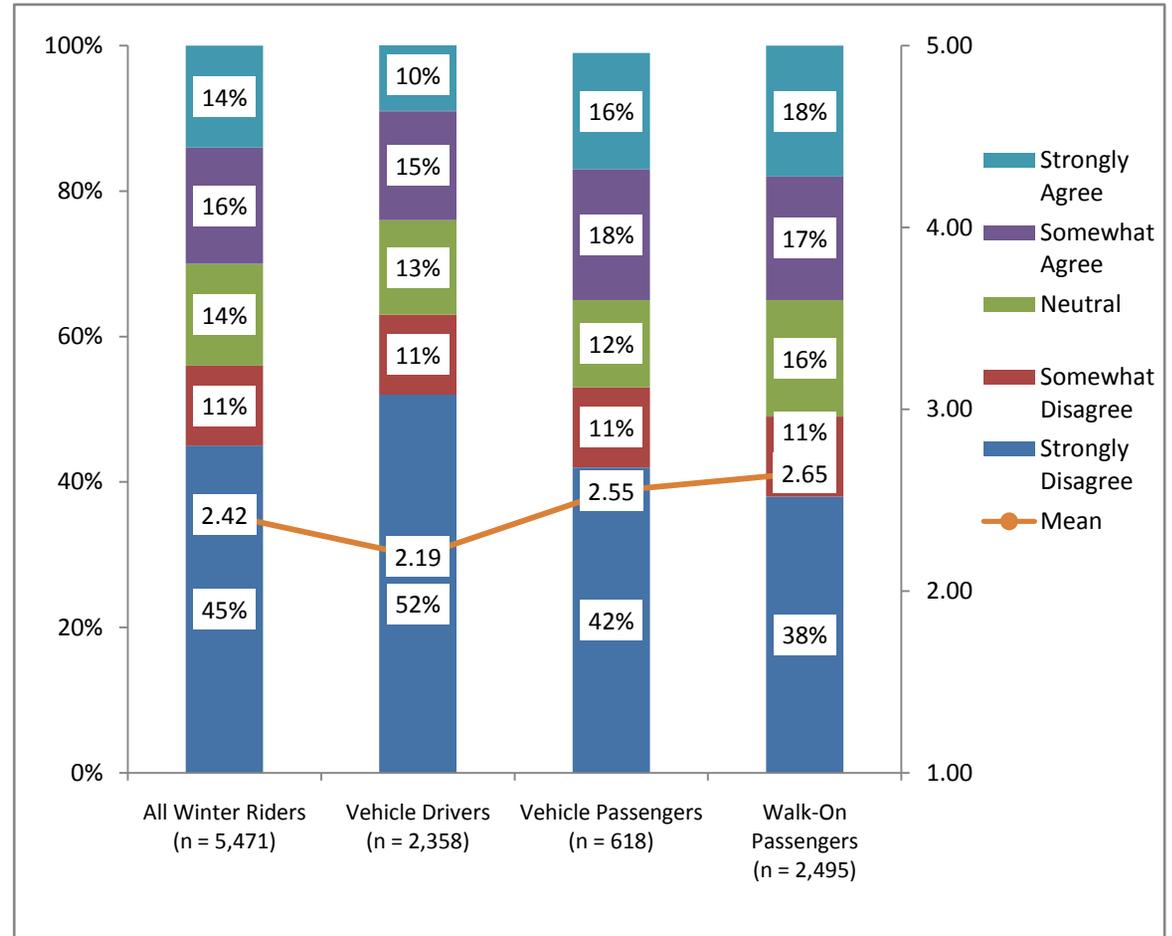
## Boarding Mode Results: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times

Not surprisingly, winter vehicle drivers and, to a lesser extent, winter vehicle passengers are more likely than winter walk-on passengers to “strongly disagree” with the proposal to have single-occupant vehicle drivers pay a premium fare to board during peak travel periods.

- Fifty-two percent (52%) of vehicle drivers and 42 percent of vehicle passengers “strongly disagree” that they should pay a higher fare during peak travel periods compared with 38 percent of walk-on passengers.

On the other hand, 35 percent of winter walk-on passengers agree that single-occupant vehicle drivers should pay a premium fare to board during peak travel periods compared to just 25 percent of vehicle drivers.

**Figure 19: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times by Boarding Mode**



Question: To what extent do you agree or disagree WSF should institute a High Occupancy Toll (HOT) program?  
 Mean based on 5-point where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is 3.

## Route Level Results: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times

Winter riders on all routes generally disagree with the proposal that single-occupant vehicle drivers should pay a higher fare during peak travel times – 50 percent or more disagrees.

Winter riders on the Seattle / Bainbridge route are somewhat more likely than riders on all other routes to agree with this proposal.

- While the majority (51%) of Seattle / Bainbridge winter riders disagrees with this proposal, 35 percent agrees that drivers of single-occupant vehicles should pay a higher fare when traveling during peak travel times.

On the other hand, winter riders on the three South Sound routes and the Mukilteo / Clinton route evidence higher than average opposition to this proposal.

**Table 32: Agreement / Disagreement that Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	30%	<b>35%</b>	31%	30%	29%	21%	24%	24%	24%	28%
Strongly Agree	14%	<b>16%</b>	15%	14%	13%	10%	11%	7%	10%	13%
Somewhat Agree	16%	<b>19%</b>	16%	16%	16%	11%	13%	17%	14%	15%
<b>Neutral</b>	14%	14%	17%	16%	9%	12%	16%	11%	21%	14%
Somewhat Disagree	11%	12%	9%	8%	11%	12%	11%	11%	15%	12%
Strongly Disagree	45%	39%	43%	46%	<b>52%</b>	<b>54%</b>	48%	54%	40%	46%
<b>Net Disagree</b>	56%	51%	52%	54%	<b>63%</b>	<b>66%</b>	59%	<b>65%</b>	55%	58%
<b>Mean</b>	2.42	2.62	2.50	2.44	2.27	2.12	2.30	2.11	2.38	2.38

Question: To what extent do you agree or disagree WSF should institute a High Occupancy Toll (HOT) program?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

## Time of Day / Week Travel Analysis: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times

Two out of five (60%) peak weekday winter passengers disagree with this proposal to have vehicles pay a higher fare during peak travel periods.

- This is notable among peak weekday winter vehicle drivers – 70 percent of whom disagrees. Moreover, the level of disagreement is very high – 60 percent of peak weekday vehicle drivers “strongly disagree.”

**Table 33: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n=5,471)	Total Peak Weekday (n=2,987)	Peak Weekday			Total Off-Peak Weekday (n=1,297)	Off-Peak Weekday			Total Weekend (n=1,187)	Weekend		
			Vehicle Driver (n=1,156)	Vehicle Passenger (n=239)	Walk-On (n=1,592)		Vehicle Driver (n=619)	Vehicle Passenger (n=157)	Walk-On (n=521)		Vehicle Driver (n=583)	Vehicle Passenger (n=222)	Walk-On (n=382)
<b>Net Agree</b>	30%	28%	19%	34%	35%	28%	22%	30%	35%	<b>36%</b>	33%	38%	36%
Strongly Agree	14%	13%	7%	17%	17%	13%	9%	16%	17%	16%	13%	16%	20%
Somewhat Agree	16%	15%	12%	17%	18%	15%	13%	14%	18%	20%	20%	22%	16%
Neutral	14%	13%	12%	15%	13%	15%	16%	11%	16%	14%	12%	11%	23%
Somewhat Disagree	11%	11%	10%	8%	12%	11%	11%	11%	9%	11%	11%	13%	9%
Strongly Disagree	45%	<b>49%</b>	<b>60%</b>	43%	41%	<b>47%</b>	<b>51%</b>	48%	40%	39%	45%	39%	32%
<b>Net Disagree</b>	56%	<b>60%</b>	<b>70%</b>	51%	53%	58%	62%	59%	49%	50%	56%	52%	41%
Mean	2.42	2.32	1.95	2.56	2.57	2.35	2.19	2.39	2.63	2.62	2.47	2.63	2.84
<i>To what extent do you agree or disagree WSF should institute a High Occupancy Toll (HOT) program?  Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”</i>													

## Other Significant Results: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times by Primary Trip Purpose

As would be expected, winter commuters are the most likely to oppose this proposal. This segment would be the most likely to be impacted by a HOT lane system on a daily basis.

- Three out of five (61%) commuters disagree with the proposal that single-occupant vehicle drivers should pay a higher fare to travel during peak travel times.
- This figure jumps to 74 percent when looking at winter vehicle drivers only.

**Table 34: Single-Occupant Vehicle Drivers Should Pay a Higher Fare during Peak Travel Times by Trip Purpose**

	All Winter Riders (n=5,471)	Commute (n=2,547)	Personal/ Shopping (n=942)	Recreation (n=656)	Social (n=693)	Other (n=505)
	<b>All Riders</b>					
Net Agree	30%	27%	31%	<b>35%</b>	34%	27%
Net Disagree	56%	<b>61%</b>	55%	45%	54%	60%
	<b>Vehicle Drivers</b>					
Net Agree	25%	14%	26%	<b>37%</b>	<b>33%</b>	24%
Net Disagree	63%	<b>74%</b>	60%	46%	56%	61%

*To what extent do you agree or disagree WSF should institute a High Occupancy Toll (HOT) program?  
Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."*

# Key Findings – Attitudes toward Proposed Operational Strategies Regarding Fare Collection to Move Passengers More Efficiently

## Summary – Attitudes toward Proposed Operational Strategies Regarding Fare Collection to Move Passengers More Efficiently

In the March On-Board Survey, respondents were asked to indicate the extent to which they agreed or disagreed with eight proposed operations strategies regarding how fares are collected that could potentially improve the flow of people and vehicles onto the ferry.

### Support

WSF Customers show strong support for four of the proposed strategies:

- **Offering a discount to vehicle drivers who purchase round-trip tickets:** Half (50%) of all winter riders “strongly agree” that vehicle drivers who purchase a round-trip ticket should receive a discount; an additional 27 percent “somewhat agrees” with this strategy.
- **Offering a stored-value card:** Nearly two out of five (38%) winter riders “strongly agree” that WSF should offer a stored-value card; an additional 31 percent “somewhat agrees.”
- **Changing ticket booth layout so two vehicles can pay simultaneously:** More than three out of five (63%) winter riders agree that WSF should change the ticket booth layout so two vehicles can pay simultaneously – 34 percent “strongly agrees” and 29 percent “somewhat agrees.”
- **Using in-vehicle transponders:** Three out of five (61%) winter riders agree that WSF should use in-vehicle transponders to collect fares – 36 percent “strongly agrees” and 25 percent “somewhat agrees.”

## Neutral

Opinions were almost equally divided regarding the use of on-board ticketing.

- Thirty-eight percent (38%) of all winter riders agree that on-board ticketing should be offered for riders who do not pre-pay fares. Nearly the same number (35%) disagrees with this concept. The balance (27%) neither agrees nor disagrees.

## Do Not Support

Winter riders generally do not support the idea limiting payment options for vehicles to cash or pre-paid (i.e., eliminating credit card payments).

- Over half (56%) of all passengers disagree with the idea of limiting forms of payment for vehicles – 38 percent strongly disagrees.

Finally, winter riders do not support the idea of requiring pre-payment of fares for all passengers.

- Seventy-three percent (73%) of all winter riders disagree with the proposed strategy to eliminate ticket purchases at ticket counters for walk-on passengers – 53 percent “strongly disagrees.” This is more pronounced among walk-on and vehicle passengers. Three out of four walk-on (75%) and vehicle passengers (74%) oppose this strategy. Fifty-five percent (55%) of walk-on passengers strongly disagrees with this strategy.
- Three out of four (75%) of all winter riders disagree with the proposed strategy of eliminating ticket purchases at toll booths for vehicle passengers – 56 percent “strongly disagrees.” Surprisingly, there are no significant differences in the level of disagreement between vehicle driver, vehicle passenger, and walk-on passengers.

**Table 35: Attitudes toward Operational Strategies to Improve Fare Collection to Move Passengers More Efficiently**

	Discount for Round-trip Vehicle Ticketing	Offer A Stored-value Card	Change Ticket Booth Layout	Use In-Vehicle Transponders	On-Board Ticketing	Limit Payment for Vehicles to Cash or Pre-Paid	Eliminate Ticket Purchases At Ticket Counters	Eliminate Ticket Purchases At Toll Booths
% Agree	77%	69%	63%	61%	38%	24%	9%	11%
% Neutral	14%	21%	28%	22%	27%	20%	18%	14%
% Disagree	9%	10%	9%	17%	35%	56%	73%	75%
Mean	4.11	3.90	3.83	3.69	2.96	2.41	1.88	1.86

Question: To what extent do you agree or disagree that WSF should do the following to improve the flow of people and vehicles onto the ferries?

Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

Base: Winter Riders (n = 5,471)

# Detailed Findings –Attitudes toward Proposed Operational Strategies Regarding Fare Collection to Move Passengers More Efficiently

## Offer a Discount to Vehicle Drivers Purchasing Round-trip Tickets

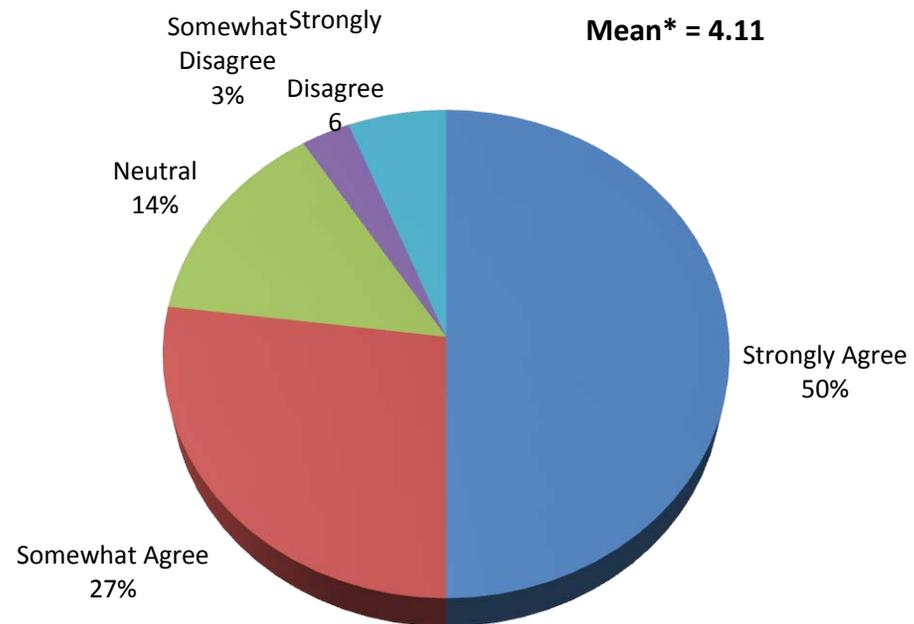
### All Winter Riders: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets

Of the eight proposed operational strategies, winter riders agree most with the proposal to offer a discount to vehicle drivers purchasing round-trip tickets.

- Half (50%) of all winter riders “strongly agree” with the proposal to offer a discount to vehicle drivers who purchase a round-trip ticket; an additional 27 percent “somewhat agrees.”

While attitudes are positive across all segments, there are some differences, notably by passenger type and day / time of travel.

**Figure 20: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets**



Question: To what extent do you agree or disagree WSF should offer a discount to vehicle drivers purchasing round-trip tickets?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

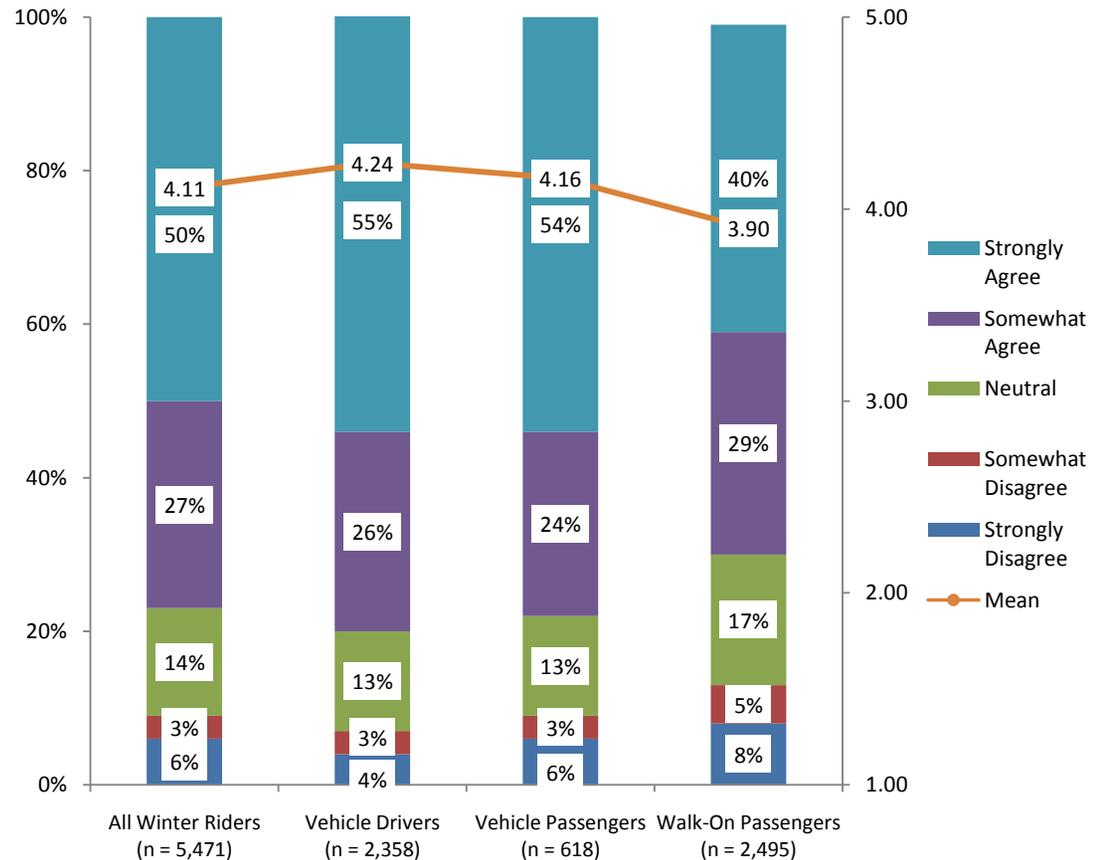
## Boarding Mode Results: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets

While the majority of all winter riders agree with this proposal, it is not surprising that vehicle drivers and vehicle passengers agree more strongly with this strategy than do walk-on passengers.

- Fifty-five percent (55%) of vehicle drivers and 54% of vehicle passengers “strongly agree” with the idea of offering vehicle drivers a discount if they purchase a round-trip ticket compared to 40 percent of walk-on passengers.

At the same time, while the majority (69%) of walk-on passengers agrees with this proposal, more (13%) walk-on passengers disagree with this proposal compared to vehicle drivers (7%) or vehicle passengers (9%).

**Figure 21: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should offer a discount to vehicle drivers purchasing round-trip tickets?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Route Level Results: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets

While this proposal receives generally positive ratings by winter riders on all routes, riders on Edmonds / Kingston, Mukilteo / Clinton, and Fauntleroy / Southworth are the most positive.

- Four out of five (80%) Edmonds / Kingston winter riders agree with this proposal; 52 percent “strongly agrees.” There are no differences between vehicle drivers, vehicle passengers, and walk-on passengers on this route.
- Virtually the same number (79%) of Mukilteo / Clinton winter riders agrees with this proposal; 53 percent “strongly agrees.” Among vehicle drivers on the Mukilteo / Clinton route, agreement with this proposal jumps to 82 percent, with 58 percent “strongly agreeing.”
- While 79 percent of winter riders on the Fauntleroy / Southworth route also agree with this proposal, the strength of their agreement is not as high. Just under half (48%) “strongly agrees” while 31 percent “somewhat agrees.” There are no differences between vehicle drivers, vehicle passengers, and walk-on passengers on this route.

It is noteworthy that while a relatively high percentage (54%) of Fauntleroy / Vashon winter riders “strongly agree” with this proposal, overall agreement amongst these riders is below-average or average. This is due primarily to the differences in attitudes between vehicle drivers and walk-on passengers on these routes.

- Eighty-one percent (81%) of Fauntleroy / Vashon winter vehicle drivers agree with this proposal compared to just 62 percent of walk-on passengers.

**Table 36: Offer a Discount to Vehicle Drivers Purchasing Round-trip Tickets by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	77%	75%	73%	<b>80%</b>	<b>79%</b>	74%	<b>79%</b>	72%	70%	70%
Strongly Agree	50%	46%	45%	<b>52%</b>	<b>53%</b>	54%	48%	53%	44%	49%
Somewhat Agree	27%	<b>29%</b>	28%	<b>28%</b>	26%	20%	<b>31%</b>	19%	26%	21%
<b>Neutral</b>	14%	14%	15%	11%	12%	<b>20%</b>	12%	<b>22%</b>	17%	<b>21%</b>
Somewhat Disagree	3%	<b>4%</b>	<b>5%</b>	<b>4%</b>	2%	1%	4%	0%	<b>8%</b>	2%
Strongly Disagree	6%	6%	<b>7%</b>	5%	7%	5%	4%	6%	5%	8%
<b>Net Disagree</b>	9%	<b>10%</b>	<b>12%</b>	9%	9%	6%	8%	6%	13%	10%
<b>Mean</b>	4.11	4.06	3.98	4.18	4.17	4.16	4.17	4.13	3.97	4.03

Question: To what extent do you agree or disagree that WSF should offer a discount to vehicle drivers purchasing round-trip tickets?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees,” the mid-point is “3.”

## Time of Day / Week Travel Results: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets

Off-peak weekday and weekend winter riders are more likely than peak weekday winter riders to agree with offering vehicle drivers a discount when purchasing round-trip tickets. This may reflect the fact that these riders are more likely to pay with a single ride ticket while those driving on during peak weekday travel periods use multi-ride cards and hence they would receive no benefit.

- Nearly four out of five (78%) off-peak weekday and weekend riders agree that vehicle drivers should receive a discount if purchasing round-trip tickets. Among vehicle drivers this increases to 83 percent for off-peak weekday drivers and 81 percent of weekend drivers. Of note is the high percentage (58%) of off-peak weekday vehicle drivers who “strongly agree” with this proposed strategy.

**Table 37: Offer a Discount to Vehicle Drivers Purchasing Round-Trip Tickets by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	77%	73%	<b>77%</b>	<b>75%</b>	68%	<b>78%</b>	<b>83%</b>	78%	71%	<b>78%</b>	<b>81%</b>	79%	74%
<b>Strongly Agree</b>	50%	46%	<b>52%</b>	<b>53%</b>	38%	<b>52%</b>	<b>58%</b>	<b>52%</b>	42%	<b>51%</b>	52%	<b>55%</b>	45%
<b>Somewhat Agree</b>	27%	27%	25%	22%	<b>30%</b>	26%	25%	26%	29%	27%	29%	24%	29%
<b>Neutral</b>	14%	<b>17%</b>	16%	14%	<b>19%</b>	13%	11%	12%	17%	13%	12%	13%	15%
<b>Somewhat Disagree</b>	3%	4%	2%	5%	6%	3%	3%	2%	4%	3%	3%	3%	4%
<b>Strongly Disagree</b>	6%	<b>7%</b>	6%	7%	8%	6%	3%	8%	<b>9%</b>	5%	4%	4%	<b>8%</b>
<b>Net Disagree</b>	9%	<b>11%</b>	8%	12%	<b>14%</b>	9%	6%	10%	<b>13%</b>	8%	7%	7%	12%
<b>Mean</b>	4.11	4.00	<b>4.16</b>	<b>4.09</b>	3.85	<b>4.17</b>	<b>4.32</b>	4.13	3.91	<b>4.16</b>	<b>4.22</b>	4.23	3.98

Question: To what extent do you agree or disagree that WSF should offer a discount to vehicle drivers purchasing round-trip tickets?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Offer a Stored-Value Card

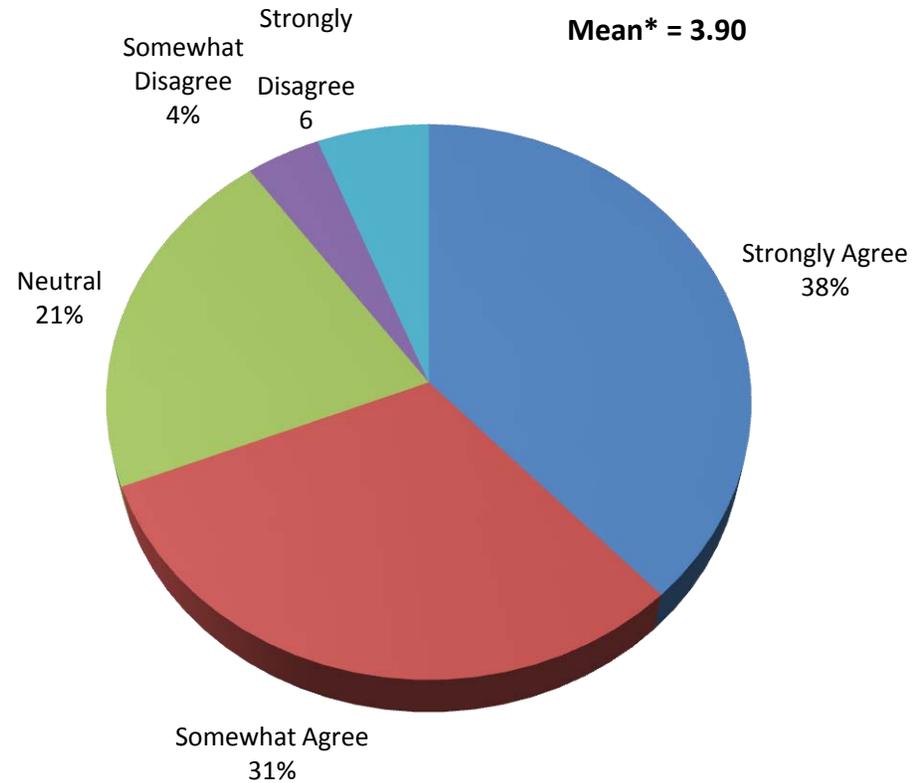
### All Winter Riders: Offer a Stored-Value Card

Of the eight proposed operational strategies to collect fares more efficiently, winter riders are also positive toward the idea of offering a stored-value card.

- Nearly two out of five (38%) winter riders “strongly agree” that WSF should offer a stored-value card; an additional 31 percent “somewhat agrees.”

Of note is the relatively high number (21%) of winter riders who offer no opinion. This would suggest that this offering may be of little interest to specific segments of riders, notably those who use other forms of pre-paid fare media.

Figure 22: Offer a Stored-Value Card



Question: To what extent do you agree or disagree that WSF should offer a stored-value card?

Base: All Winter Riders (n = 5,471)

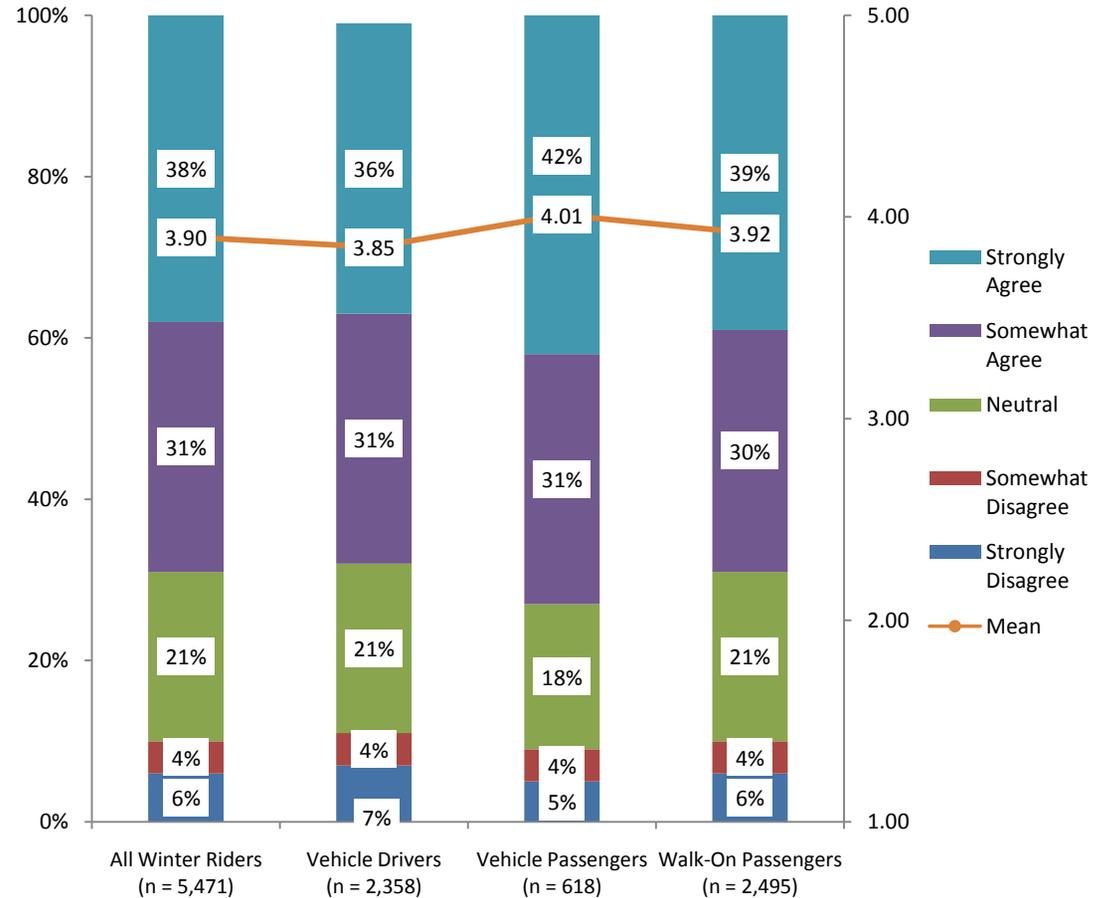
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: Offer a Stored-Value Card

A stored-value card is of greatest interest to vehicle passengers.

- More than two out of five (42%) vehicle passengers “strongly agree” that WSF should offer a stored-value card compared with 36 percent of vehicle drivers and 39 percent of walk-on passengers.
- In total, 73 percent of vehicle passengers favor a stored-value card. This may reflect the fact that vehicle passengers ride less often (on average taking 13 one-way trips per month) and hence may be less apt to have a multi-ride card or monthly pass.

**Figure 23: Offer a Stored-Value Card by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should offer a stored-value card?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Route Level Results: Offer a Stored-Value Card

Interest in a stored-value card is highest among winter riders on the Seattle / Bainbridge ferry.

- Nearly three out of four (74%) Seattle / Bainbridge winter riders agree that WSF should offer a stored-value card; 42 percent “strongly agrees.”

Interest is lowest among riders on the Keystone / Port Townsend route.

- Nearly one out of five (19%) Keystone / Port Townsend winter riders disagree that WSF should offer a stored-value card. This most likely reflects the fact that a relatively high percentage of Keystone / Port Townsend riders are infrequent riders (63% take fewer than seven trips per month).

**Table 38: Offer a Stored-Value Card by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	69%	<b>74%</b>	70%	67%	66%	69%	71%	67%	53%	63%
Strongly Agree	38%	<b>42%</b>	40%	35%	35%	43%	35%	41%	32%	33%
Somewhat Agree	31%	32%	30%	32%	31%	26%	36%	26%	21%	30%
Neutral	21%	17%	20%	25%	22%	17%	22%	17%	28%	24%
Somewhat Disagree	4%	4%	3%	3%	5%	6%	1%	1%	<b>12%</b>	5%
Strongly Disagree	6%	4%	6%	5%	8%	8%	5%	<b>15%</b>	7%	9%
<b>Net Disagree</b>	10%	8%	9%	8%	13%	14%	6%	16%	<b>19%</b>	14%
<b>Mean</b>	3.90	<b>4.04</b>	3.95	3.87	3.81	3.90	3.96	3.78	3.58	3.74

Question: To what extent do you agree or disagree that WSF should offer a stored-value card?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Time of Day / Week Travel Results: Offer a Stored-Value Card

There are no significant differences in interest in a stored-value card by those traveling at different times of the day or week.

**Table 39: Offer a Stored-Value Card by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	69%	69%	65%	69%	71%	68%	67%	73%	67%	71%	70%	75%	67%
Strongly Agree	38%	38%	36%	38%	39%	37%	35%	41%	39%	40%	39%	44%	38%
Somewhat Agree	31%	31%	29%	31%	32%	31%	32%	32%	28%	31%	31%	31%	29%
Neutral	21%	21%	21%	22%	20%	21%	22%	19%	21%	20%	19%	16%	24%
Somewhat Disagree	4%	4%	5%	3%	4%	5%	5%	4%	6%	4%	4%	4%	3%
Strongly Disagree	6%	7%	9%	7%	5%	6%	6%	5%	7%	6%	7%	4%	6%
<b>Net Disagree</b>	10%	11%	14%	10%	9%	11%	11%	9%	13%	10%	11%	8%	9%
<b>Mean</b>	3.90	3.89	3.79	3.92	3.96	3.88	3.86	3.99	3.85	3.95	3.90	4.07	3.92

Question: To what extent do you agree or disagree that WSF should offer a stored-value card?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

**Other Significant Results: Offer a Stored-Value Card by Fare Payment Method**

As expected, interest in a stored-value card is higher among those paying with single ride tickets than those using a multi-ride card. Those using a multi-ride card receive a discount which would not be available with a stored-value card.

- Seventy-one percent (71%) of single ride ticket users agree that WSF should offer a stored-value card; 40 percent “strongly agrees.”

What is unexpected is the generally high level of interest (74%) among those paying with a monthly pass. Monthly pass users receive a discount over the posted fare which would be lost if using a stored-value card.

- Seventy-four percent (74%) of monthly pass users agree that WSF should offer a stored-value card. This increased support comes from a higher than average percentage (36%) saying they “somewhat agree” with the proposal coupled with 39 percent saying that they “strongly agree.”

**Table 40: Offer a Stored-Value Card by Fare Payment Method**

	Fare Payment Method				
	All Winter Riders (n = 5,471)	Single Ride (n = 1,805)	Multi-Ride Card (n = 1,917)	Monthly Pass (n = 930)	Other (n = 558)
<b>Net Agree</b>	69%	<b>71%</b>	66%	<b>74%</b>	66%
<b>Net Disagree</b>	10%	8%	<b>12%</b>	9%	<b>13%</b>
<b>Mean</b>	3.90	<b>3.98</b>	3.84	<b>3.99</b>	3.84

*Question: To what extent do you agree or disagree that WSF should offer a stored-value card?*

*Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”*

*Columns do not sum to 100 percent; neutral category excluded.*

## Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously

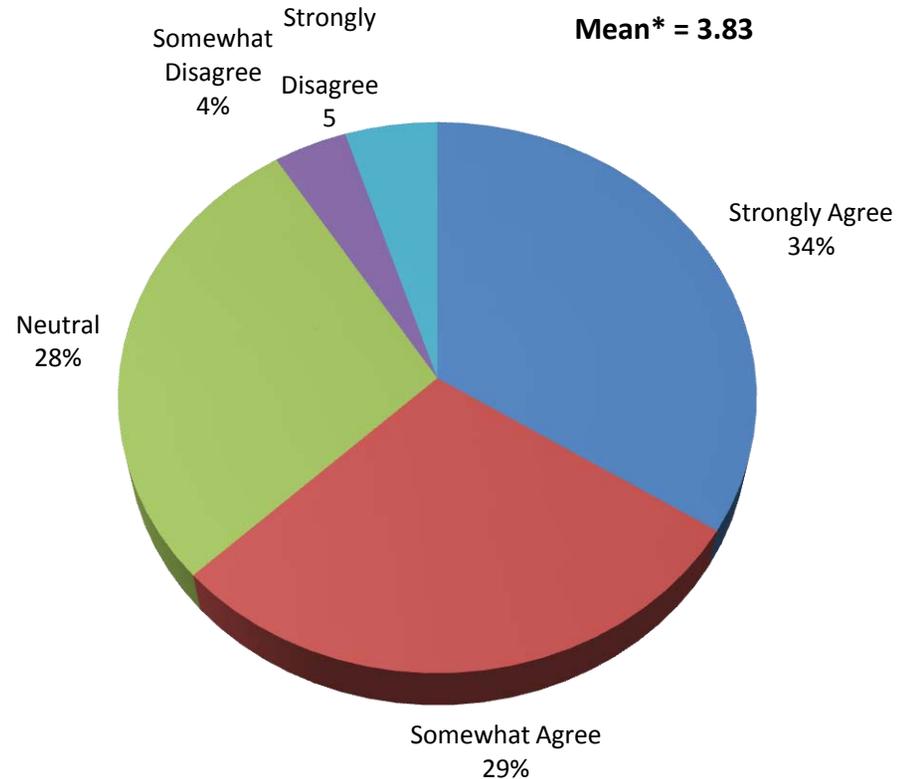
### All Winter Riders

Winter riders also show above-average interest (mean = 3.83) in changing the ticket booth layout so two vehicles can pay simultaneously.

- More than one out of three (34%) winter riders “strongly agree” that WSF should change the layout of ticket booths so two vehicles can pay at the same time. An additional 29 percent “somewhat agrees.”

Of note is the relatively high number (28%) of winter riders who offer no opinion. This would suggest that this proposal may be of little interest to specific segments of riders.

**Figure 24: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously**



Question: To what extent do you agree or disagree that WSF should change ticket booth layout so two vehicles can pay simultaneously?

Base: All Winter Riders (n = 5,471)

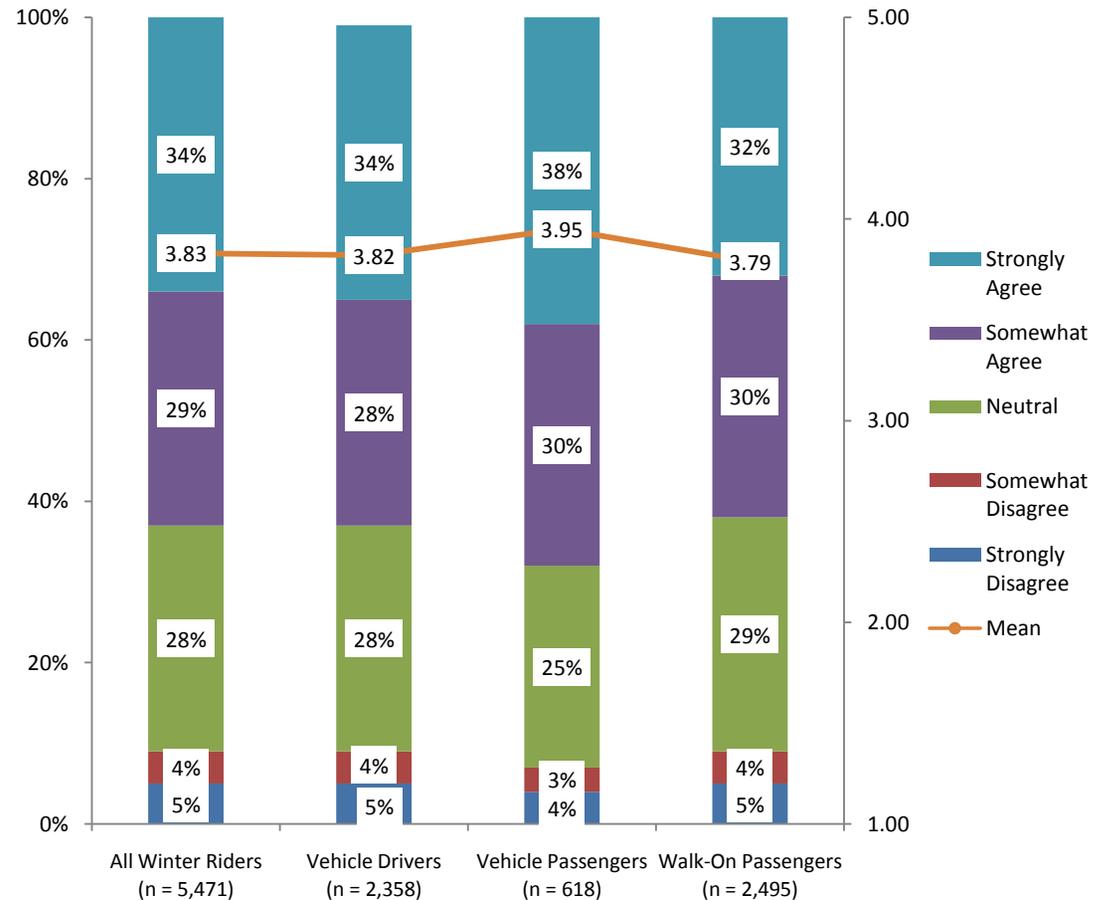
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously

While the majority of all winter riders agree with this proposal, it is perhaps a surprise that it is primarily of interest to vehicle passengers.

- Nearly two out of five (38%) vehicle passengers “strongly agree” that WSF should change the ticket booth layout so two vehicles can pay simultaneously.
- Slightly more than one out of three (34%) vehicle drivers “strongly agree” with this proposal.

**Figure 25: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously by Boarding Mode**



Question: To what extent do you agree or disagree that passengers that WSF should change ticket booth layout so two vehicles can pay simultaneously?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Route Level Results: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously

Winter riders on two routes – Fauntleroy / Vashon and, to a lesser extent, Point Defiance / Tahlequah – see an advantage to this proposal.

- More than three out of four (78%) Fauntleroy / Vashon winter riders agree that WSF should change the layout of ticket booths so two vehicles can pay simultaneously; over half (52%) “strongly agrees.”
- Seventy-one percent (71%) of winter riders on Point Defiance / Tahlequah agree with this proposal. Their overall agreement, however, is not as strong as that evident among Fauntleroy / Vashon riders. In this case, 40 percent “strongly agrees” and 31 percent “somewhat agrees”.

While the majority (52%) of Keystone / Port Townsend riders sees an advantage to this proposal, an above average percentage (15%) disagrees.

**Table 41: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	63%	<b>66%</b>	63%	61%	55%	<b>78%</b>	63%	<b>71%</b>	52%	64%
Strongly Agree	34%	35%	34%	32%	27%	<b>52%</b>	34%	40%	21%	33%
Somewhat Agree	29%	31%	29%	29%	28%	26%	29%	31%	31%	31%
Neutral	28%	26%	28%	30%	<b>34%</b>	16%	30%	18%	33%	31%
Somewhat Disagree	4%	3%	3%	<b>5%</b>	<b>6%</b>	2%	3%	5%	8%	3%
Strongly Disagree	5%	5%	6%	5%	4%	5%	4%	7%	7%	2%
<b>Net Disagree</b>	9%	8%	9%	10%	10%	7%	7%	12%	<b>15%</b>	5%
<b>Mean</b>	3.83	3.87	3.82	3.77	3.68	<b>4.18</b>	3.86	3.92	3.52	3.90

Question: To what extent do you agree or disagree that WSF should change ticket booth layout so two vehicles can pay simultaneously?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## ***Time of Day / Week Travel Results: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously***

There are no significant differences in the extent to which winter riders boarding at different times or on different days agree or disagree with this proposal.

**Table 42: Change Ticket Booth Layout so Two Vehicles Can Pay Simultaneously by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	63%	63%	61%	72%	64%	62%	62%	67%	60%	63%	64%	67%	60%
<b>Strongly Agree</b>	34%	34%	34%	41%	33%	34%	34%	40%	32%	33%	33%	36%	31%
<b>Somewhat Agree</b>	29%	29%	27%	31%	31%	28%	28%	27%	28%	30%	31%	31%	29%
<b>Neutral</b>	28%	28%	29%	23%	28%	28%	28%	23%	29%	28%	27%	26%	31%
<b>Somewhat Disagree</b>	4%	4%	4%	2%	4%	4%	4%	4%	4%	4%	5%	3%	4%
<b>Strongly Disagree</b>	5%	4%	5%	3%	4%	6%	6%	6%	7%	4%	4%	3%	5%
<b>Net Disagree</b>	9%	8%	9%	5%	8%	10%	10%	10%	11%	8%	9%	6%	9%
<b>Mean</b>	3.83	3.85	3.81	4.03	3.83	3.81	3.81	3.89	3.75	3.84	3.82	3.94	3.77
<p><i>Question: To what extent do you agree or disagree that WSF should change ticket booth layout so two vehicles can pay simultaneously?</i></p> <p><i>Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."</i></p>													

## Use In-Vehicle Transponders to Collect Fares

### All Winter Riders: Use In-Vehicle Transponders to Collect Fares

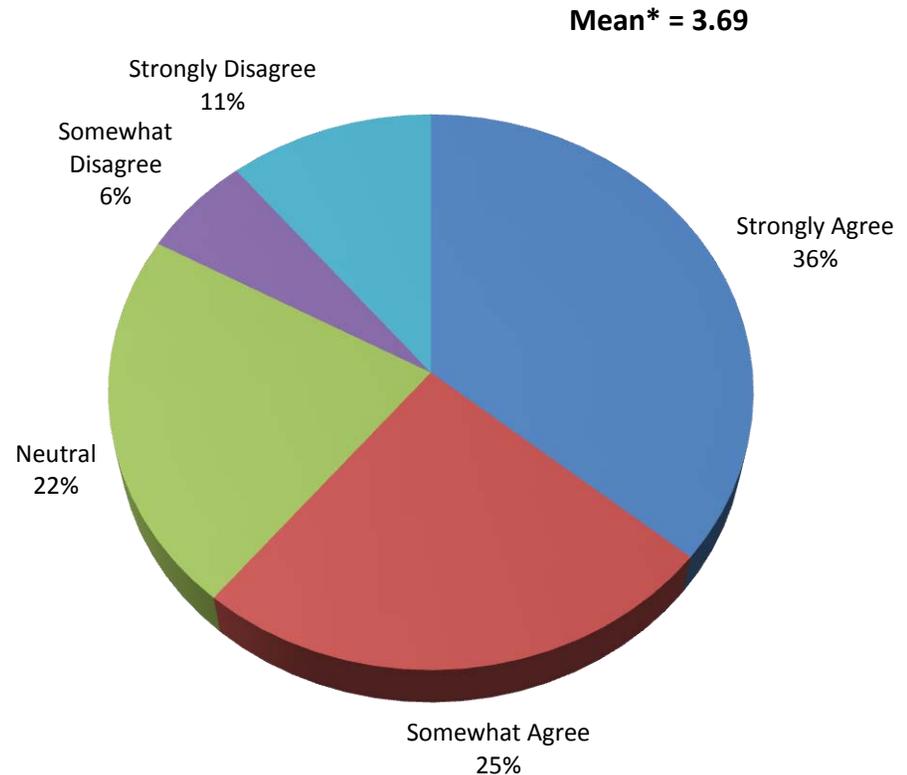
Finally, winter riders show above-average interest (mean = 3.69) in the proposal to use in-vehicle transponders to collect fares.

- Thirty-six percent (36%) of all winter riders “strongly agree” that WSF should use in-vehicle transponders to collect fares; an additional 25 percent “somewhat agrees.”

However, nearly one out of five (17%) disagrees.

- Moreover, nearly twice as many (11%) “strongly disagrees” as “somewhat disagrees” (6%).

**Figure 26: Use In-Vehicle Transponders to Collect Fares**



Question: To what extent do you agree or disagree that WSF should use in-vehicle transponders to collect fares?

Base: All Winter Riders (n = 5,471)

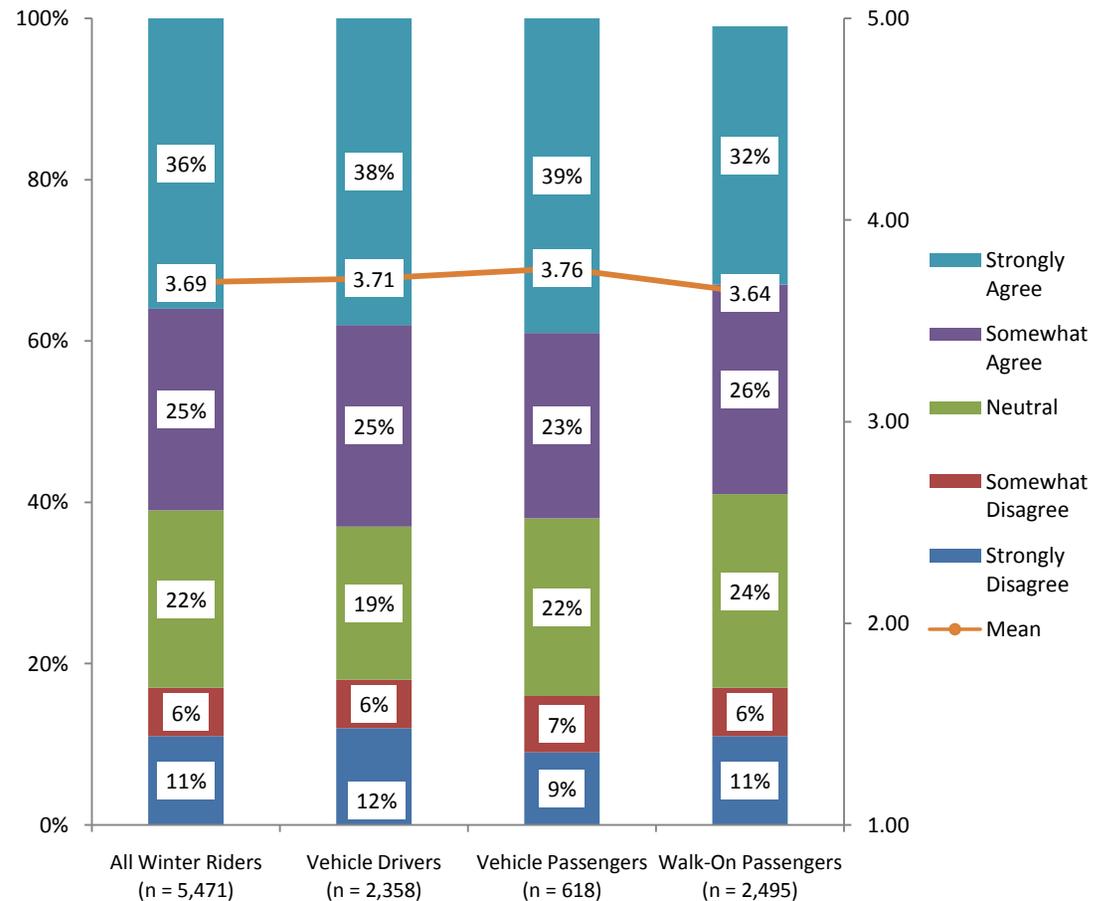
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: Use In-Vehicle Transponders to Collect Fares

As evidenced by the means, there are no significant differences in the overall agreement with this proposal. However, vehicle drivers are more likely than walk-on passengers to “strongly agree” that WSF should use in-vehicle transponders to collect fares.

- Nearly two out of five (39%) vehicle passengers “strongly agree” that WSF use in-vehicle transponders to collect fares.
- Nearly one out of three (32%) walk-on passengers “strongly agree.” A great percentage of walk-on passengers “somewhat agree” (26%) or are neutral (24%).

**Figure 27: Use In-Vehicle Transponders to Collect Fares by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should use in-vehicle transponders to collect fares?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Route Level Results: Use In-Vehicle Transponders to Collect Fares

Winter riders on two routes – Seattle / Bainbridge and Fauntleroy / Vashon – see an advantage to this proposal.

- Two out of five (40%) Seattle / Bainbridge winter riders “strongly agree” that WSF should use in-vehicle transponders to collect fares; an additional 27 percent “somewhat agrees.”
- Forty-one percent (41%) of Fauntleroy / Vashon winter riders “strongly agree” that WSF should use in-vehicle transponders; an additional 26 percent “somewhat agrees.”

Reflecting the difference in riders on these routes, Keystone / Port Townsend and Anacortes / San Juans riders are more likely to disagree with this proposal.

- Thirty-one percent (31%) of Keystone / Port Townsend riders and 26 percent of Anacortes / San Juans riders disagree with using in-vehicle transponders to collect fares.

**Table 43: Use In-Vehicle Transponders to Collect Fares by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	61%	<b>67%</b>	59%	59%	62%	67%	66%	59%	35%	47%
Strongly Agree	36%	<b>40%</b>	37%	33%	37%	<b>41%</b>	39%	37%	14%	26%
Somewhat Agree	25%	27%	22%	26%	25%	26%	27%	22%	21%	21%
<b>Neutral</b>	22%	20%	23%	22%	21%	15%	20%	25%	<b>35%</b>	<b>28%</b>
Somewhat Disagree	6%	5%	5%	6%	5%	8%	6%	5%	<b>15%</b>	9%
Strongly Disagree	11%	8%	12%	13%	12%	10%	8%	11%	16%	17%
<b>Net Disagree</b>	17%	13%	17%	19%	17%	18%	14%	16%	<b>31%</b>	<b>26%</b>
<b>Mean</b>	3.69	<b>3.86</b>	3.67	3.59	3.69	3.80	3.82	3.70	3.02	3.30

Question: To what extent do you agree or disagree that WSF should use in-vehicle transponders to collect fares ?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Time of Day / Week Travel Results: Use In-Vehicle Transponders to Collect Fares

There are no significant differences in the extent to which winter riders boarding at different times or on different days agree or disagree with this proposal.

**Table 44: Use In-Vehicle Transponders to Collect Fares by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	61%	62%	64%	58%	63%	62%	64%	67%	54%	59%	60%	62%	57%
Strongly Agree	36%	38%	41%	38%	36%	36%	38%	44%	28%	34%	35%	37%	31%
Somewhat Agree	25%	24%	23%	20%	27%	26%	26%	23%	26%	25%	25%	25%	26%
Neutral	22%	21%	20%	23%	22%	21%	18%	22%	28%	22%	20%	22%	25%
Somewhat Disagree	6%	6%	5%	6%	6%	6%	5%	2%	8%	7%	6%	11%	4%
Strongly Disagree	11%	11%	11%	13%	10%	11%	12%	10%	10%	12%	14%	6%	14%
<b>Net Disagree</b>	17%	17%	16%	19%	16%	17%	17%	12%	18%	19%	20%	17%	18%
<b>Mean</b>	3.69	3.74	3.79	3.63	3.74	3.69	3.72	3.88	3.53	3.64	3.60	3.77	3.56

Question: To what extent do you agree or disagree that WSF should use in-vehicle transponders to collect fares?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

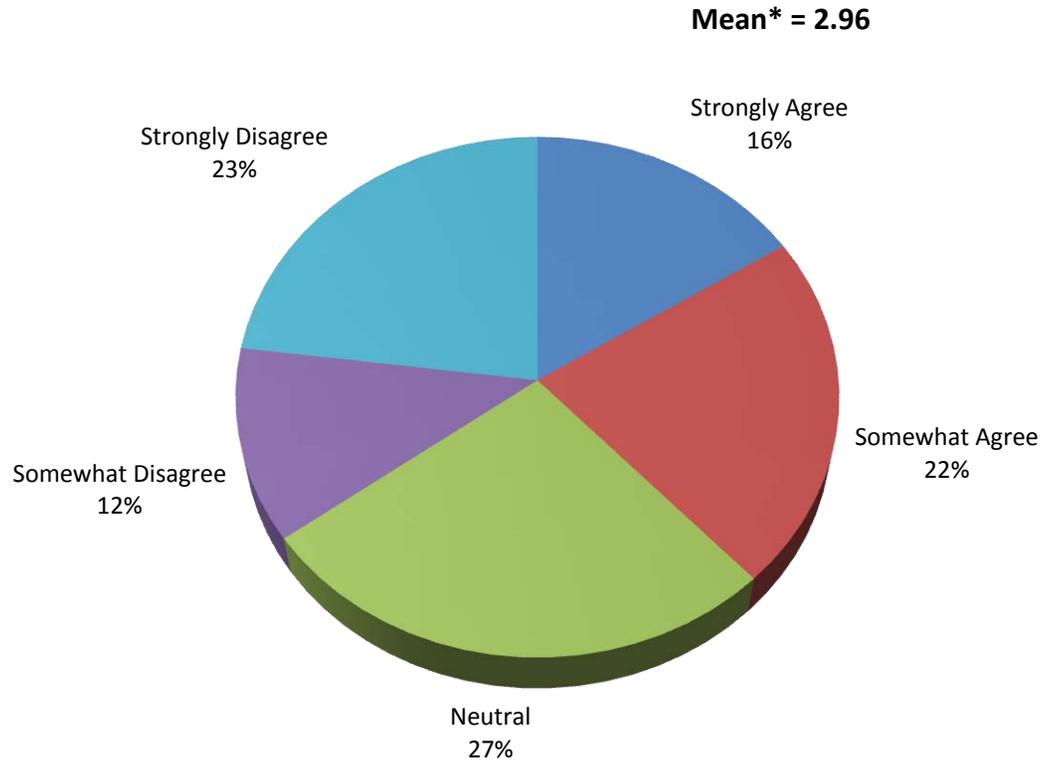
## On-Board Ticketing

### All Winter Riders: On-Board Ticketing

Opinions were almost equally divided and tend toward negative regarding the use of on-board ticketing – overall mean = 2.96.

- While 38 percent of winter riders agree that on-board ticketing is a potential solution to moving vehicles and passengers more efficiently, a nearly equal number (35%) disagrees.
- Moreover, the strength of disagreement is stronger than the strength of agreement – 16 percent “strongly agrees” compared with 23 percent who “strongly disagrees.”

**Figure 28: On-Board Ticketing**



Question: To what extent do you agree or disagree that WSF should offer on-board ticketing (for those who do not pre-pay fares)?

Base: All Winter Riders (n = 5,471)

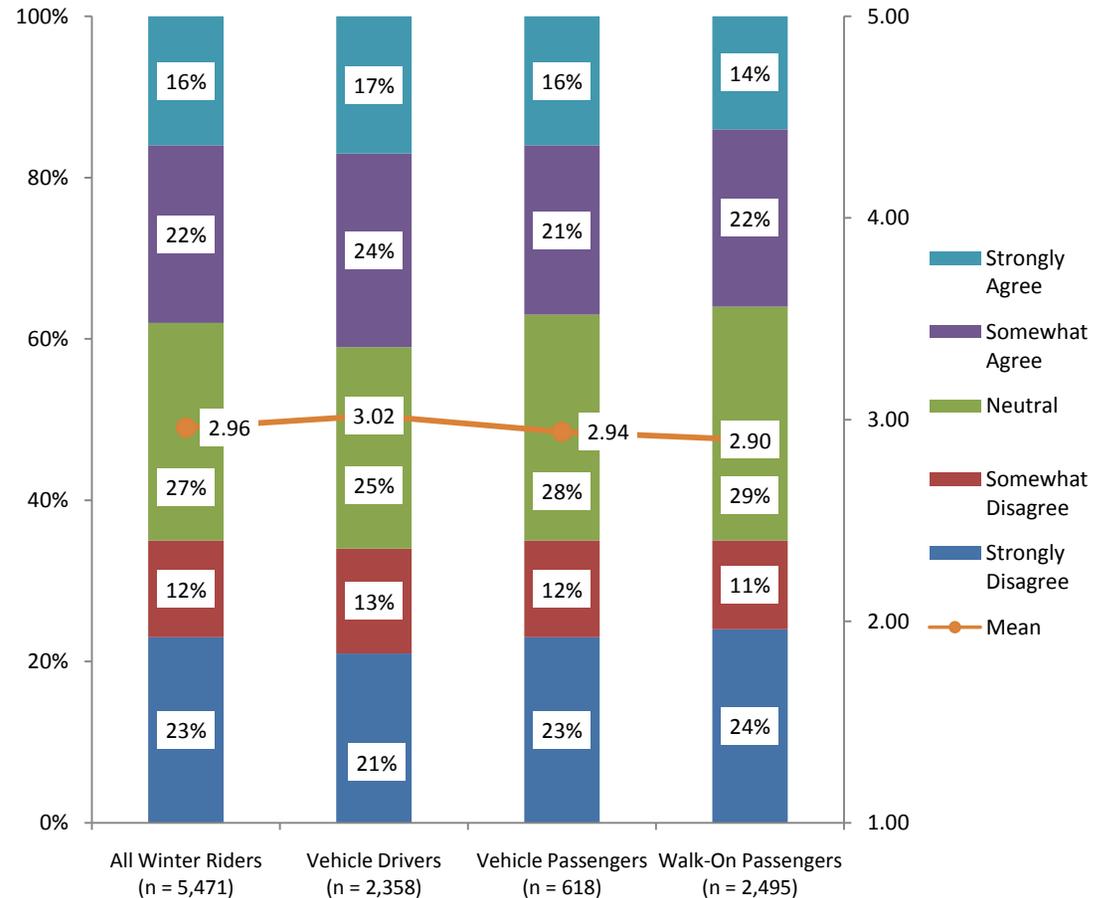
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: On-Board Ticketing

While small, there are statistically significant differences in attitudes toward the proposal for on-board ticketing between vehicle drivers and walk-on passengers.

- Thirty-seven percent (37%) of all winter vehicle passengers agree with the proposal for on-board ticketing. Nearly the same percentage (35%) of winter walk-on passengers disagree.
- Forty-one percent (41%) of winter vehicle drivers agree with on-board ticketing; on the other hand fewer (34%) disagree.

**Figure 29: On-Board Ticketing by Boarding Mode**



Question: To what extent do you agree or disagree that passengers that WSF should offer on-board ticketing (for those who do not pre-pay fares)?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" "3" is the mid-point.

## Route Level Results: On-Board Ticketing

Support for on-board ticketing is high among Fauntleroy / Vashon winter riders.

- More than three out of five (62%) Fauntleroy / Vashon winter riders agree that WSF should offer on-board ticketing for those that do not pre-pay fares. Sixty-seven percent (67%) of Fauntleroy / Vashon winter vehicle drivers agree with this proposal; fewer (47%) winter walk-on passengers agree. Note that the majority (57%) of Fauntleroy / Vashon winter riders are vehicle drivers.

Winter riders on the Point Defiance / Tahlequah route are also more likely to support this proposal – notably 23 percent “strongly agrees” that WSF should implement a process for on-board ticketing.

Winter riders on Seattle / Bainbridge, Seattle / Bremerton, Edmonds / Kingston, and Mukilteo Clinton are more likely than those on other routes to disagree with this proposal. This may reflect an acknowledgement that on-board ticketing could be difficult on the larger ferries or, in the case of Mukilteo / Clinton, on the shorter routes.

**Table 45: On-Board Ticketing to Collect Fares by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	38%	35%	30%	35%	38%	<b>62%</b>	39%	<b>47%</b>	35%	41%
<b>Strongly Agree</b>	16%	13%	13%	13%	15%	<b>33%</b>	14%	<b>23%</b>	8%	18%
<b>Somewhat Agree</b>	22%	22%	17%	22%	23%	29%	25%	24%	27%	23%
<b>Neutral</b>	27%	27%	30%	28%	27%	15%	35%	24%	34%	27%
<b>Somewhat Disagree</b>	12%	<b>13%</b>	<b>13%</b>	<b>14%</b>	<b>14%</b>	7%	6%	5%	<b>16%</b>	10%
<b>Strongly Disagree</b>	23%	25%	<b>27%</b>	23%	22%	17%	19%	24%	16%	21%
<b>Net Disagree</b>	35%	38%	<b>40%</b>	37%	36%	24%	25%	29%	32%	31%
<b>Mean</b>	2.96	2.86	2.75	2.89	2.95	<b>3.53</b>	3.09	3.17	2.95	3.07

Question: To what extent do you agree or disagree that WSF should offer on-board ticketing (for those who do not pre-pay fares) ?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Time of Day / Week Travel Results: On-Board Ticketing to Collect Fares

Weekend winter riders, notably weekend winter vehicle drivers, are more likely than peak weekday riders to support this proposal to use on-board ticketing to collect fares from those who do not pre-pay their fares. Forty-five percent (45%) of weekend winter vehicle drivers agree with this proposal. They may view this as a convenience.

On the other hand, peak weekday winter riders are more likely to disagree (37%). These riders may feel it would be difficult to monitor the system, especially during busy time periods.

**Table 46: On-Board Ticketing by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	38%	37%	38%	39%	35%	38%	40%	32%	36%	<b>41%</b>	<b>45%</b>	39%	36%
Strongly Agree	16%	15%	16%	16%	13%	16%	17%	16%	15%	16%	19%	15%	15%
Somewhat Agree	22%	22%	22%	23%	22%	21%	23%	16%	21%	25%	26%	24%	22%
Neutral	27%	26%	26%	24%	26%	27%	25%	30%	30%	27%	24%	28%	32%
Somewhat Disagree	12%	12%	12%	10%	14%	13%	15%	12%	8%	11%	11%	13%	10%
Strongly Disagree	23%	25%	24%	27%	25%	23%	21%	26%	26%	20%	20%	20%	22%
<b>Net Disagree</b>	35%	<b>37%</b>	36%	36%	39%	35%	36%	38%	34%	32%	31%	33%	32%
<b>Mean</b>	2.96	2.90	2.94	2.93	2.85	2.96	3.00	2.85	2.92	3.05	3.13	3.01	2.97

Question: To what extent do you agree or disagree that WSF should offer on-board ticketing (for those who do not pre-pay fares)?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

## Eliminate Ticket Purchases at Ticket Counters / Toll Booths

Two similar questions were asked regarding whether WSF should eliminate ticket purchases at ticket counters in the terminals for walk-on passengers and/or at the toll booths for vehicle drivers. This proposal would, in essence, require pre-payment of all fares. Because of the similarity of the questions, they are analyzed jointly.

### All Winter Riders: Eliminate Ticket Purchases at Ticket Counters / Toll Booths

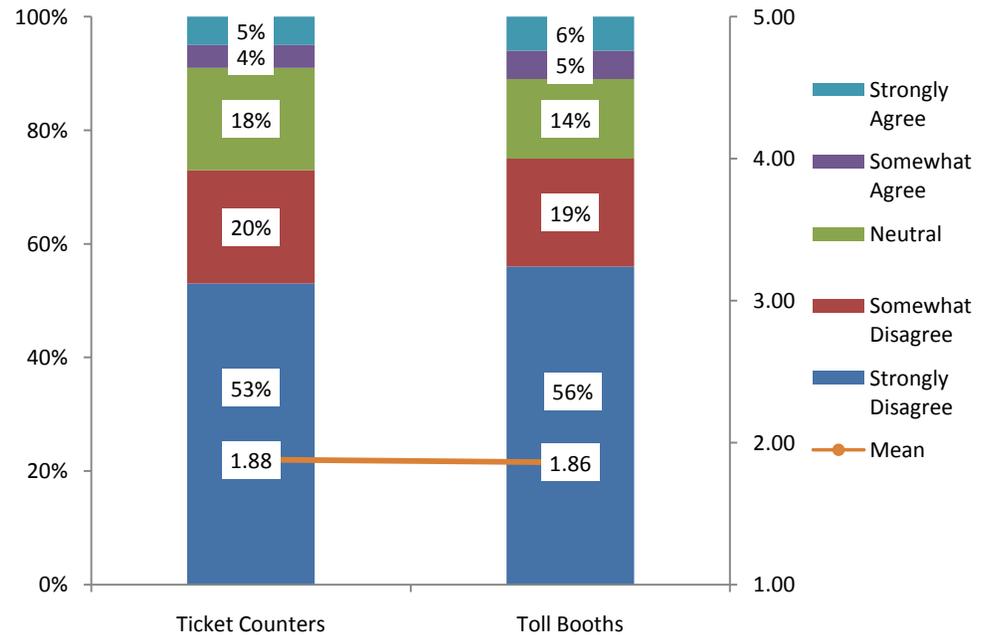
Winter riders are clearly negative about both proposals. They are somewhat more negative about the proposal to eliminate ticket purchases for vehicles at toll booths.

- More than half (53%) of all winter riders “strongly disagree” with the proposal to eliminate ticket purchases at the ticket counters for walk-on passengers. An additional 20 percent “somewhat disagrees.”
- Fifty-six percent (56%) of all winter riders “strongly disagree” with the proposal to eliminate ticket purchases at the toll booths for drivers. An additional 19 percent “somewhat disagrees.”

As the table below shows, most riders have similar reactions to both proposals.

Eliminate at Ticket Counters	Eliminate at Toll Booths				
	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
Strongly Disagree	85%	14%	8%	9%	16%
Somewhat Disagree	7%	68%	9%	19%	11%
Neutral	6%	14%	75%	28%	20%
Somewhat Agree	1%	3%	5%	38%	6%
Strongly Agree	1%	1%	4%	6%	47%

**Figure 30: Eliminate Ticket Purchases at Ticket Counters / Toll Booths**



Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at ticket counters / toll booths?

Base: All Winter Riders (n = 5,471)

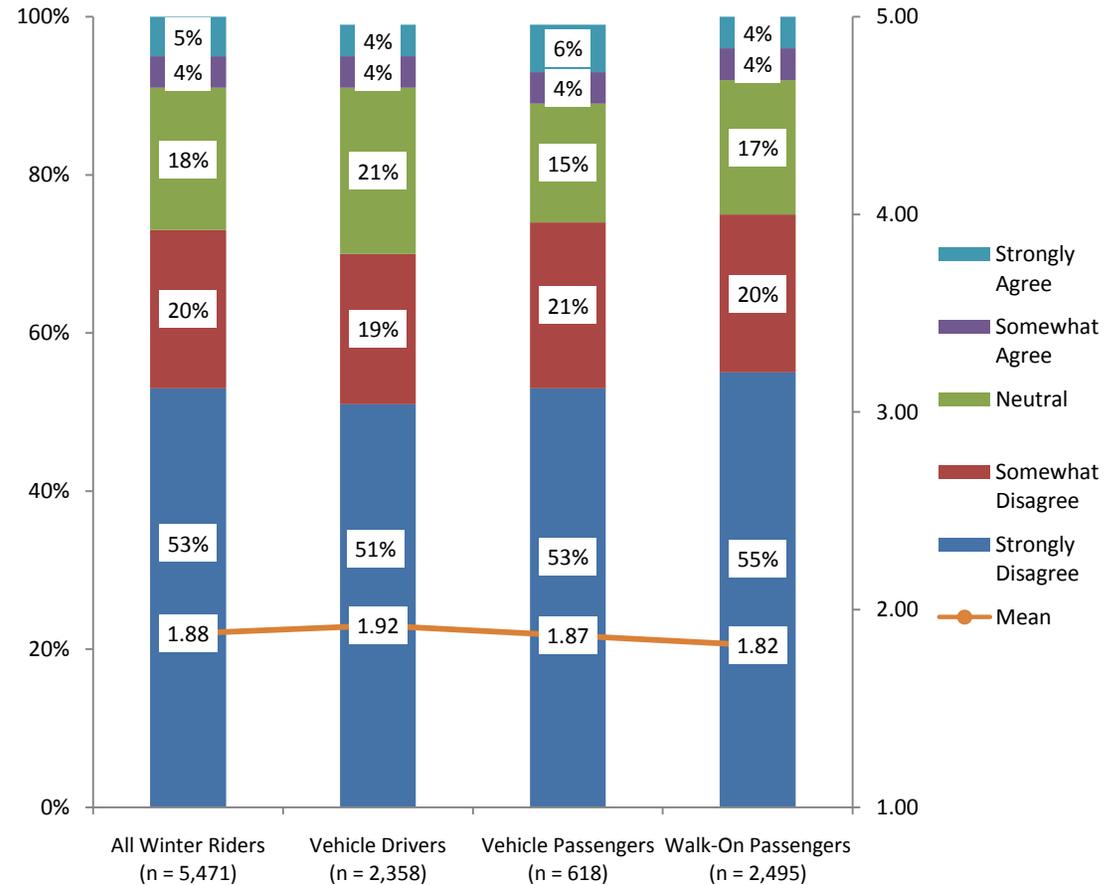
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: Eliminate Ticket Purchases at Ticket Counters

Walk-on and vehicle passengers are significantly more likely than vehicle drivers to disagree with this proposal to eliminate ticket purchases at ticket counters for walk-on passengers.

- Three out of four walk-on (75%) and vehicle passengers (74%) disagree with this proposal compared to 70 percent of vehicle drivers.
- Of note is the relatively high (55%) percentage of walk-on passengers who “strongly disagree.”

**Figure 31: Eliminate Ticket Purchases at Ticket Counters by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at ticket counters for walk-on passengers?

Base: All Winter Riders (n = 5,471)

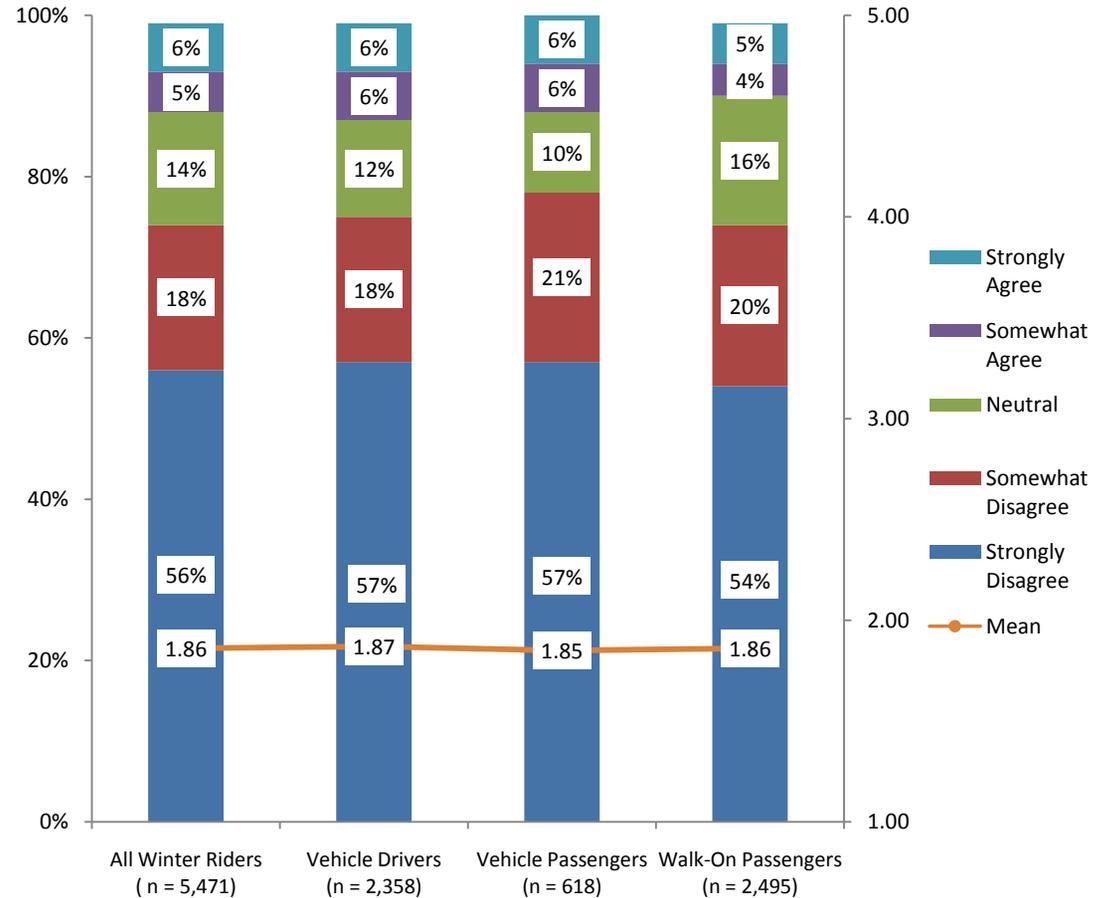
\* Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Boarding Mode Results: Eliminate Ticket Purchases at Toll Booths

There are more differences in attitudes toward eliminating ticket purchases at the toll booths between the different passenger types.

It is noteworthy that significantly more winter vehicle drivers than winter walk-on passengers agree with this proposal – 12 percent compared with 9 percent, respectively. Overall agreement, however, continues to be very low.

**Figure 32: Eliminate Ticket Purchases at Toll Booths by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at toll booths for vehicle passengers?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" "3" is the mid-point.

## Route Level Results: Eliminate Ticket Purchases at Ticket Counters

While the majority of winter riders on all routes disagree with this proposal to eliminate ticket purchases at ticket counters for walk-ons, winter riders on Fauntleroy / Vashon and to a somewhat lesser extent, Seattle / Bainbridge evidence the highest levels of disagreement.

- More than four out of five (81%) of Fauntleroy / Vashon winter riders disagree with this proposal; 61 percent “strongly disagrees.” Among walk-on passengers, disagreement jumps to a total of 88 percent, with 67 percent “strongly disagreeing.”
- Three out of four (75%) Seattle / Bainbridge winter riders disagree with this proposal; 55 percent “strongly disagrees.” There are no differences between passenger types on this route.

**Table 47: Eliminate Ticket Purchases at Ticket Counters by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	9%	7%	9%	9%	12%	7%	12%	5%	6%	8%
<b>Strongly Agree</b>	5%	3%	4%	5%	7%	4%	6%	3%	2%	4%
<b>Somewhat Agree</b>	4%	4%	5%	4%	5%	3%	6%	2%	4%	4%
<b>Neutral</b>	18%	17%	19%	22%	19%	12%	22%	17%	21%	19%
<b>Somewhat Disagree</b>	20%	20%	18%	20%	23%	20%	18%	20%	20%	18%
<b>Strongly Disagree</b>	53%	55%	54%	49%	47%	<b>61%</b>	49%	57%	53%	55%
<b>Net Disagree</b>	73%	<b>75%</b>	72%	69%	70%	<b>81%</b>	67%	77%	73%	73%
<b>Mean</b>	1.88	1.81	1.87	1.97	2.01	1.68	2.01	1.75	1.82	1.84

Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at ticket counters for walk-on passengers ?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Route Level Results: Eliminate Ticket Purchases at Toll Booths

There are no significant differences in the extent to which winter riders disagree with the proposal to eliminate ticket purchases at toll booths across the routes.

It is interesting to note that while the majority (75%) of Fauntleroy / Vashon winter riders disagree with this proposal, an above average percentage (18%) also agrees.

- Nearly one out of five (18%) Fauntleroy / Vashon winter riders agree with the idea of eliminating ticket purchases at toll booths. Among vehicle drivers, this figure increases to 25 percent. More than two out of three (67%) of Fauntleroy / Vashon winter riders drive on the ferry either as driver or a vehicle passenger.

**Table 48: Eliminate Ticket Purchases at Toll Booths by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	11%	10%	11%	13%	10%	<b>18%</b>	12%	12%	7%	12%
<b>Strongly Agree</b>	6%	4%	6%	7%	6%	<b>12%</b>	7%	5%	2%	5%
<b>Somewhat Agree</b>	5%	6%	5%	6%	4%	6%	5%	7%	5%	7%
<b>Neutral</b>	14%	12%	15%	13%	15%	7%	17%	13%	15%	13%
<b>Somewhat Disagree</b>	19%	21%	18%	18%	<b>24%</b>	15%	16%	14%	20%	17%
<b>Strongly Disagree</b>	56%	57%	56%	56%	51%	60%	55%	63%	57%	59%
<b>Net Disagree</b>	75%	78%	74%	74%	75%	75%	71%	77%	77%	76%
<b>Mean</b>	1.86	1.80	1.87	1.89	1.90	1.96	1.92	1.77	1.76	1.82

Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at toll booths for vehicle passengers ?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

## Time of Day / Week Travel Results: Eliminate Ticket Purchases at Ticket Counters

Peak weekday riders are more likely than off-peak weekday riders to disagree with this proposal – 75 percent compared with 70 percent, respectively.

- This is driven primarily by higher levels of disagreement among peak weekday walk-on passengers – 77 percent of whom disagree.

**Table 49: Eliminate Ticket Purchases at Ticket Counters by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	9%	8%	8%	10%	7%	8%	9%	8%	8%	9%	8%	11%	10%
Strongly Agree	5%	4%	4%	7%	3%	4%	4%	4%	4%	5%	5%	6%	5%
Somewhat Agree	4%	4%	4%	3%	4%	4%	5%	4%	4%	4%	3%	5%	5%
<b>Neutral</b>	18%	17%	<b>20%</b>	16%	15%	<b>21%</b>	<b>25%</b>	17%	17%	17%	18%	14%	19%
Somewhat Disagree	20%	19%	18%	17%	20%	20%	20%	23%	20%	21%	21%	23%	19%
Strongly Disagree	53%	<b>56%</b>	54%	58%	57%	50%	46%	52%	<b>54%</b>	53%	53%	52%	53%
<b>Net Disagree</b>	73%	<b>75%</b>	72%	75%	<b>77%</b>	70%	66%	<b>75%</b>	<b>74%</b>	74%	74%	75%	72%
<b>Mean</b>	1.88	1.82	1.87	1.84	1.77	<b>1.93</b>	2.01	1.84	1.84	1.89	1.86	1.91	1.91

Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at ticket counters for walk-on passengers ?

Mean: Based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" the mid-point is "3."

## Time of Day / Week Travel Results: Eliminate Ticket Purchases at Toll Booths

Weekend drivers are more likely than peak and off-peak weekday drivers to disagree with this proposal – 80 percent compared with 75 percent and 72 percent, respectively.

- Moreover, nearly two-thirds (62%) of weekend drivers “strongly disagree” with this proposal.

**Table 50: Eliminate Ticket Purchases at Toll Booths by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	11%	12%	<b>14%</b>	<b>15%</b>	9%	11%	<b>14%</b>	7%	9%	11%	9%	14%	12%
<b>Strongly Agree</b>	6%	6%	<b>8%</b>	7%	4%	6%	7%	3%	5%	6%	4%	7%	8%
<b>Somewhat Agree</b>	5%	6%	6%	8%	5%	5%	7%	4%	4%	5%	5%	7%	4%
<b>Neutral</b>	14%	12%	11%	8%	<b>14%</b>	<b>15%</b>	14%	14%	18%	12%	10%	9%	<b>18%</b>
<b>Somewhat Disagree</b>	19%	19%	18%	17%	21%	19%	18%	19%	21%	20%	18%	24%	19%
<b>Strongly Disagree</b>	56%	57%	57%	60%	56%	55%	54%	59%	53%	56%	<b>62%</b>	53%	51%
<b>Net Disagree</b>	75%	76%	75%	77%	77%	74%	72%	78%	74%	76%	<b>80%</b>	77%	70%
<b>Mean</b>	1.86	1.84	1.90	1.85	1.80	1.89	1.94	1.75	1.87	1.85	1.73	1.91	1.97

Question: To what extent do you agree or disagree that WSF should eliminate ticket purchases at toll booths for vehicle passengers ?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

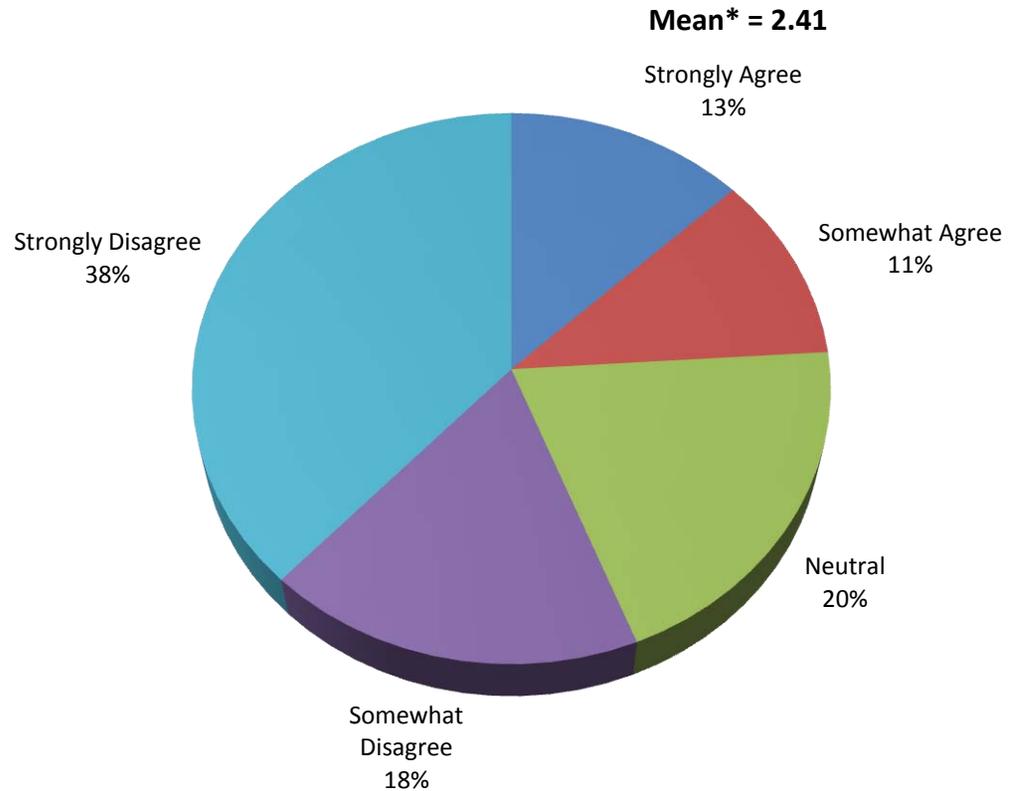
## Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets

### All Winter Riders: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets

Opinions toward limiting forms of payment for vehicles to cash or pre-paid (i.e., no credit card payments) also tend toward negative – overall mean = 2.41.

- Nearly one out of four (24%) winter riders agree with the proposal to only accept cash or pre-pay tickets at the toll booths.
- On the other hand, 56 percent disagrees with this proposal. Moreover, the strength of this disagreement is high with more than twice as many winter riders strongly disagreeing (38%) as somewhat disagreeing (18%).

**Figure 33: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets**



Question: To what extent do you agree or disagree that WSF should limit forms of payment for vehicles to cash or pre-paid tickets?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" "3" is the mid-point.

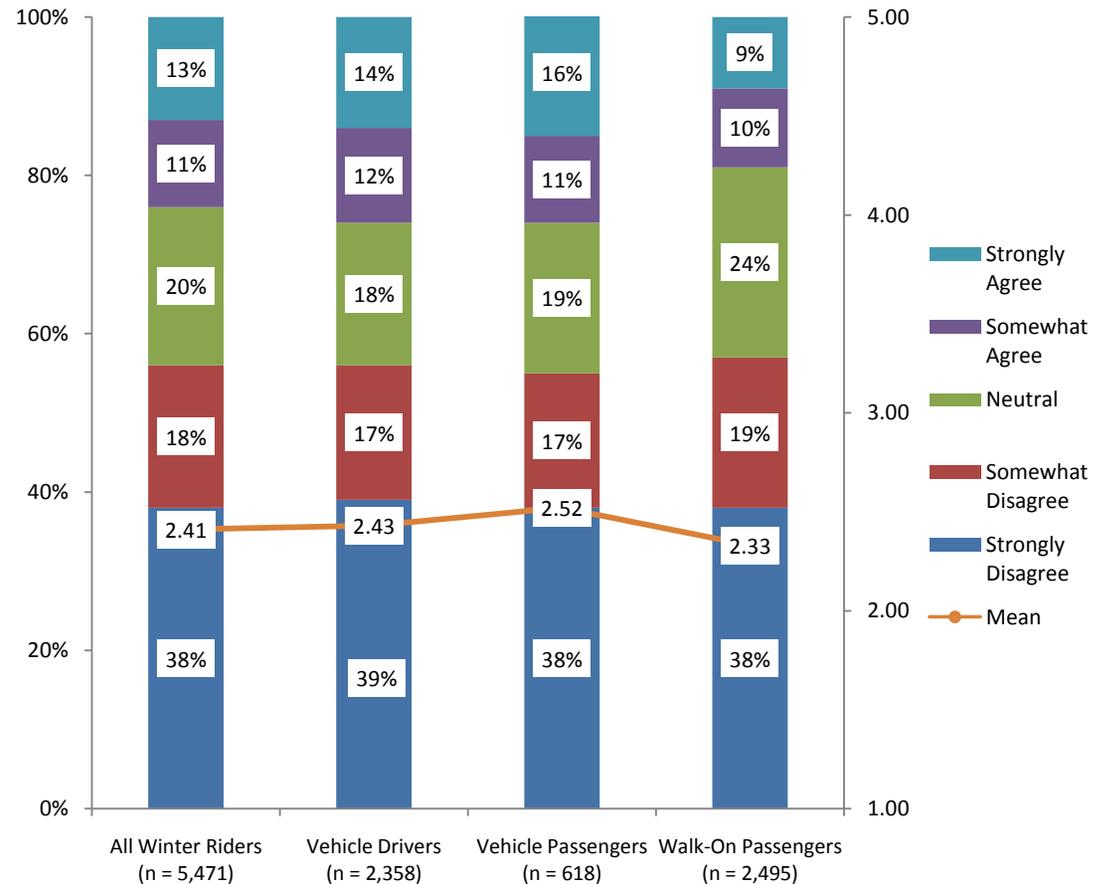
## Boarding Mode Results: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets

While the majority of vehicle drivers (56%) and vehicle passengers (55%) disagree with this proposal, vehicle drivers and vehicle passengers are more likely than walk-on passengers to agree that forms of payment for vehicles at the toll booths should be limited to cash or pre-paid. This may reflect the fact that they are more likely to be affected by the slowdowns resulting from credit card payments and is consistent with statements made in the focus groups about problems with back-ups while waiting for credit cards to process.

- More than one out of four (26%) vehicle drivers and 27 percent of all vehicle passengers agree with limiting forms of payment compared to 19 percent of walk-on passengers.

There are no differences in the overall levels of disagreement with this proposal across the three customer segments.

**Figure 34: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets by Boarding Mode**



Question: To what extent do you agree or disagree that WSF should limit forms of payment for vehicles to cash or pre-paid tickets?

Base: All Winter Riders (n = 5,471)

\* Mean based on 5-point scale where "1" means "strongly disagrees" and "5" means "strongly agrees;" "3" is the mid-point.

## Route Level Results: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets

Winter riders on the two north sound routes – Edmonds / Kingston and Mukilteo / Clinton – are the most likely to agree with this proposal to limit forms of payment for vehicles to cash or pre-paid tickets.

- Three out of ten (30%) winter riders on Edmonds / Kingston agree with this proposal. This is consistent across all boarding modes.
- Nearly the same number (29%) of winter riders on the Mukilteo / Clinton route agrees with this proposal. Vehicle passengers on this route are more likely to agree with this proposal (38%) compared to 26 percent of vehicle drivers.

On the other hand, winter riders on several routes, notably those on Anacortes / San Juans, have strongly negative opinions.

- Seventy-one percent (71%) of Anacortes / San Juans winter riders oppose the proposal to limit forms of payment. Over half (53%) “strongly disagrees” that there should be limited forms of payment. This may reflect the high use of this route by recreational travelers and the recognition that this important market is likely to want to pay with a credit card.
- Other routes that show higher-than-average opposition to this proposal include: Fautleroy / Vashon (58% disagree), Seattle Bremerton (59% disagree), and, to a lesser extent, Seattle / Bainbridge (57% disagree).

**Table 51: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
<b>Net Agree</b>	24%	22%	18%	<b>30%</b>	<b>29%</b>	19%	22%	22%	19%	9%
Strongly Agree	13%	12%	10%	<b>16%</b>	<b>17%</b>	9%	11%	11%	7%	4%
Somewhat Agree	11%	10%	8%	14%	12%	10%	11%	11%	12%	5%
<b>Neutral</b>	20%	21%	22%	19%	17%	23%	<b>30%</b>	19%	23%	20%
Somewhat Disagree	18%	18%	19%	18%	20%	12%	11%	14%	22%	18%
Strongly Disagree	38%	39%	40%	33%	33%	46%	37%	45%	36%	<b>53%</b>
<b>Net Disagree</b>	56%	57%	59%	51%	53%	58%	48%	59%	58%	<b>71%</b>
<b>Mean</b>	2.41	2.39	2.29	<b>2.62</b>	<b>2.59</b>	2.25	2.50	2.27	2.33	1.88

Question: To what extent do you agree or disagree that WSF should limit forms of payment for vehicles to cash or pre-paid tickets?

Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

## Time of Day / Week Travel Results: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets

Peak weekday winter riders are more likely than those riding during off-peak weekday travel periods or on the weekends to disagree with the proposal to limit forms of payment for vehicles to cash or pre-paid tickets.

- More than three out of five (61%) peak weekday riders disagree with the proposal; more than two out of five (43%) “strongly disagree.”

**Table 52: Limit Forms of Payment for Vehicles to Cash or Pre-Paid Tickets by Time of Day / Week Travel and Boarding Mode**

	All Winter Riders (n = 5,471)	Total Peak Weekday (n = 2,987)	Peak Weekday			Total Off-Peak Weekday (n = 1,297)	Off-Peak Weekday			Total Weekend (n = 1,187)	Weekend		
			Vehicle Driver (n = 1,156)	Vehicle Passenger (n = 239)	Walk-On (n = 1,592)		Vehicle Driver (n = 619)	Vehicle Passenger (n = 157)	Walk-On (n = 521)		Vehicle Driver (n = 583)	Vehicle Passenger (n = 222)	Walk-On (n = 382)
<b>Net Agree</b>	24%	19%	<b>21%</b>	<b>24%</b>	15%	<b>25%</b>	<b>27%</b>	<b>30%</b>	20%	<b>27%</b>	28%	26%	25%
Strongly Agree	13%	10%	<b>12%</b>	<b>13%</b>	7%	<b>14%</b>	<b>15%</b>	<b>21%</b>	10%	<b>14%</b>	14%	15%	12%
Somewhat Agree	11%	9%	9%	11%	8%	11%	12%	9%	10%	<b>13%</b>	14%	11%	13%
Neutral	20%	20%	20%	18%	21%	22%	19%	21%	<b>28%</b>	19%	16%	18%	<b>26%</b>
Somewhat Disagree	18%	18%	16%	16%	<b>20%</b>	19%	19%	19%	19%	16%	16%	15%	16%
Strongly Disagree	38%	<b>43%</b>	43%	42%	43%	34%	36%	30%	33%	38%	40%	40%	33%
<b>Net Disagree</b>	56%	<b>61%</b>	59%	58%	<b>63%</b>	53%	55%	49%	52%	54%	56%	55%	49%
<b>Mean</b>	2.41	2.25	<b>2.32</b>	<b>2.38</b>	2.16	<b>2.52</b>	2.50	2.72	2.44	<b>2.49</b>	2.46	2.47	2.56

Question: To what extent do you agree or disagree that WSF should limit forms of payment for vehicles to cash or pre-paid tickets?  
Mean: Based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” the mid-point is “3.”

# Key Findings – Real Time Customer Information

## Summary – Real Time Customer Information

Consistent with statements made in the focus groups, winter riders are very interested in any improvements to the provision of customer information that would enhance their ability to plan for trips and predict the amount of time a trip could take – e.g., how many boats they might have to wait through and/or how much time in advance of a scheduled departure they need to depart.

- Winter riders are clearly most supportive of using technology, such as variable message signs in loading areas and/or on highways, to help inform drivers about wait times and the provision of accurate and timely e-mail alerts to notify passengers of schedule changes or delays.

Overall, riders agree with improvements to providing real time customer information regardless of boarding mode. Walk-on passengers appear to be the segment that relies most on e-mail alerts to plan their travel.

- Nearly seven out of ten (68%) winter walk-on passengers agree that WSF should make improvements to the use of e-mail alerts to provide accurate and timely announcements of service or schedule changes and/or boat delays.

There are some significant differences by route which suggest area-specific problems or issues.

- Winter riders on the Fauntleroy / Vashon, Fauntleroy / Southworth, Point Defiance / Tahlequah, and Seattle / Bremerton routes are more likely to suggest that WSF should focus its efforts on using e-mail alerts to provide accurate and timely information of service or schedule changes and/or boat times.
- A higher than average percentage (37%) of Mukilteo / Clinton winter riders “strongly agree” that WSF should improve the placement of web cams in vehicle loading areas and holding lanes on streets and highways so riders can judge wait times. Comments in the focus groups suggest that current placement does not allow riders to see the highway above the holding lanes.

Reflecting both their need and the possibility that they use technology more, peak weekday winter riders are the most likely to agree that WSF should focus its improvement efforts on the provision of e-mail alerts.

- Again, this is notable among peak weekday winter walk-on passengers. The higher levels of agreement (78%) among this segment may reflect their use of e-mail alerts to judge the time they need to leave in order to avoid waiting in the cold, wet, and/or dark. (Note data for these questions was gathered in the March survey wave only.)

## Detailed Findings – Real Time Customer Information

Comments and suggestions in the focus groups clearly indicated an opportunity for both improving customer service and for better moving passengers exists through improvements to the real time provision of customer information about vehicle capacity and schedule changes. While participants in the focus groups were generally positive, they did suggest several improvements. Three questions were included in the March questionnaire to test the extent to which riders agree or disagree WSF should make changes that could improve the provision of real time customer information. Responses were given on a 5-point Likert scale where “1” means “strongly disagrees” and “5” means “strongly agrees.”

### Agreement / Disagreement with Strategies to Improve Real Time Customer Information

#### All Winter Riders

Consistent with the statements in the focus groups, winter riders are generally positive toward any and all improvements to the provision of customer information that helps them plan for and predict their travel.

- The majority (60 percent or more) of all winter riders agree with all three of the proposals. They are clearly most supportive of using technology to help inform drivers about wait times.
- The relatively high percentages of neutral opinions for the proposals suggest that the need for these kinds of information services may vary by segment.

**Table 53: Agreement / Disagreement with Strategies to Improve Real Time Customer Information**

	Use Technologies Such as Variable Message Signs in Loading Areas and on Highways to Alert Drivers to Wait Times	Use E-Mail Alerts to Provide Accurate and Timely Announcements of Service or Schedule Changes or Boat Delays	Improve Placement of Web Cams in Vehicle Loading and Holding Lanes and Highways So Riders Can Judge Wait Times
<b>Net Agreement</b>	77%	63%	60%
<b>Strongly Agree</b>	44%	37%	33%
<b>Somewhat Agree</b>	33%	26%	27%
<b>Neutral</b>	15%	25%	27%
<b>Net Disagree</b>	8%	13%	13%
<b>Mean</b>	4.08	3.78	3.72

Question: To what extent do you agree or disagree that WSF should do each of the following to improve real time customer information?

Base: All Winter Riders (n = 5,471)

## Boarding Mode Analysis: Agreement / Disagreement with Strategies to Improve Real Time Customer Information

With the exception of the strategy to use e-mail alerts to provide accurate and timely announcements of service or schedule changes and/or boat delays, there are no differences in attitudes toward the proposed strategies to improve real time customer information between those boarding by different modes.

Winter walk-on passengers are more likely than vehicle passengers and drivers to agree with using e-mail alerts to keep passengers informed. Focus group participants frequently commented on the timeliness of these alerts.

- Somewhat surprising, however, is the relatively high percentages of vehicle drivers and passengers compared to walk-on passengers who have neutral opinions, suggesting that they may not use or be interested in using the e-mail alerts.

**Table 54: Agreement / Disagreement with Strategies to Improve Real Time Customer Information by Boarding Mode**

	All Winter Riders (n=5,471)	Vehicle Drivers (n=2,358)	Vehicle Passengers (n=618)	Walk-On Passengers (n=2,495)
<b>Use Technologies Such as Variable Message Signs in Loading Areas and on Highways to Alert Drivers to Wait Times</b>				
Net Agreement	77%	77%	77%	78%
Neutral	15%	15%	15%	14%
Net Disagreement	8%	8%	8%	8%
<b>Use E-Mail Alerts to Provide Accurate and Timely Announcements of Service or Schedule Changes or Boat Delays</b>				
Net Agreement	63%	59%	59%	<b>68%</b>
Neutral	25%	<b>26%</b>	<b>29%</b>	21%
Net Disagreement	13%	<b>15%</b>	12%	11%
<b>Improve Placement of Web Cams in Vehicle Loading and Holding Lanes and Highways So Riders Can Judge Wait Times</b>				
Net Agreement	60%	60%	61%	60%
Neutral	27%	28%	24%	26%
Net Disagreement	13%	12%	15%	14%
Question: To what extent do you agree or disagree that WSF should do each of the following to improve real time customer information? Base: All Winter Riders (n = 5,471)				

## Route Level Analysis: Agreement / Disagreement with Strategies to Improve Real Time Customer Information

Winter riders on all routes generally agree with all proposed strategies to keep riders informed. There are some differences by route that could suggest potential problem areas. Specifically, winter riders on four routes are more likely to agree that WSF should use e-mail alerts to provide accurate and timely information of service or schedule changes and/or boat times. These include:

- Fauntleroy / Vashon: 75% net agreement; 51% “strongly agrees.”
- Fauntleroy / Southworth: 67% net agreement; 36% “strongly agrees.”
- Point Defiance / Tahlequah: 68% net agreement; 43% “strongly agrees.”
- Seattle / Bremerton: 66% net agreement; 44% “strongly agrees.”

In addition, a higher than average percentage (37%) of Mukilteo / Clinton winter riders “strongly agree” that WSF should improve the placement of web cams in vehicle loading areas and holding lanes on streets and highways so riders can judge wait times. This was called out specifically in the qualitative research as a problem on this route, with participants noting that web cams only show the waiting lanes while the holding lanes can extend far up the highway.

**Table 55: Agreement / Disagreement with Strategies to Improve Real Time Customer Information by Route**

	Winter Riders (n=5,471)	SEA/ BAIN (n=2,060)	SEA/ BRE (n=758)	EDM/ KIN (n=996)	MUK/ CLI (n=646)	FAU/ VAS (n=251)	FAU/ SOU (n=268)	PTD/ TAH (n=93)	KEY/ PTT (n=128)	ANA/ SAN (n=271)
	<b>Use Technologies Such as Variable Message Signs in Loading Areas and on Highways to Alert Drivers to Wait Times</b>									
Net Agreement	77%	79%	79%	79%	72%	78%	80%	71%	82%	80%
Neutral	15%	14%	14%	15%	18%	11%	13%	22%	13%	11%
Net Disagreement	8%	7%	7%	6%	11%	11%	7%	7%	5%	9%
	<b>Use E-Mail Alerts to Provide Accurate and Timely Announcements of Service or Schedule Changes or Boat Delays</b>									
Net Agreement	63%	64%	<b>66%</b>	56%	57%	<b>75%</b>	<b>67%</b>	<b>68%</b>	54%	61%
Neutral	25%	23%	22%	30%	29%	11%	21%	27%	36%	25%
Net Disagreement	13%	13%	12%	14%	15%	14%	12%	6%	9%	14%
	<b>Improve Placement of Web Cams in Vehicle Loading and Holding Lanes and Highways So Riders Can Judge Wait Times</b>									
Net Agreement	60%	61%	53%	60%	63%	59%	61%	67%	61%	61%
Neutral	27%	26%	31%	27%	25%	27%	22%	28%	28%	27%
Net Disagreement	13%	13%	16%	13%	12%	14%	17%	6%	11%	12%

Question: To what extent do you agree or disagree that WSF should do each of the following to improve real time customer information?

Base: All Winter Riders (n = 5,471)

## Time of Day / Week Travel Analysis: Agreement / Disagreement with Strategies to Improve Real Time Customer Information

Clearly those with the most need – that is, those who travel during peak weekday periods – for real time information are the most likely to agree that WSF should use e-mail alerts.

- Seventy percent (70%) of those traveling during peak weekdays agree that there should be improvements to the e-mail alert system; 45 percent “strongly agree.”
- This service is of greatest interest to commuters, most of whom travel during peak weekday periods – 47 percent of commuters “strongly agree;” 74 percent net agreement.
- However, it is walk-on passengers during these times who are the most likely to agree – 51 percent “strongly agree;” 78 percent net agreement. This would suggest that walk-on winter riders may use e-mail alerts to determine when to leave to avoid having to walk and/or wait in bad weather or in the dark (given the survey period).

**Table 56: Agreement / Disagreement with Strategies to Improve Real Time Customer Information by Time of Day / Week Travel**

	All Winter Riders (n=5,471)	Peak Weekday (n=2,987)	Off-Peak Weekday (n=1,297)	Weekend (n=1,187)
	<b>Use Technologies Such as Variable Message Signs in Loading Areas and on Highways to Alert Drivers to Wait Times</b>			
Net Agreement	77%	78%	77%	78%
Neutral	15%	14%	16%	14%
Net Disagreement	8%	8%	7%	9%
	<b>Use E-Mail Alerts to Provide Accurate and Timely Announcements of Service or Schedule Changes or Boat Delays</b>			
Net Agreement	63%	<b>70%</b>	58%	57%
Neutral	25%	19%	27%	28%
Net Disagreement	13%	10%	14%	15%
	<b>Improve Placement of Web Cams in Vehicle Loading and Holding Lanes and Highways So Riders Can Judge Wait Times</b>			
Net Agreement	60%	62%	58%	60%
Neutral	27%	25%	28%	26%
Net Disagreement	13%	12%	14%	13%
<i>Question: To what extent do you agree or disagree that WSF should do each of the following to improve real time customer information?</i>				

# Attitudes toward Where WSF Should Focus its Future Improvement Efforts

## Summary – Attitudes toward Where WSF Should Focus its Future Improvement Efforts

The majority (56%) of all WSF riders feels that WSF should focus its improvements equally on moving vehicles and people.

- A greater percentage of summer than winter riders feel WSF should invest equally in moving vehicles and people. This could reflect the nature of summer travel. In addition, summer travelers may be less knowledgeable about how the system operates.
- The remaining riders' opinions are divided with somewhat more riders leaning toward WSF focusing its improvements on moving people – 24 percent “people mover” compared to 20 percent “vehicle mover.”

Men are more likely than women to choose a specific investment / improvement opportunity. More than three out of five (61%) women feel that WSF should invest equally compared to only half (51%) of men.

- Women who select an investment option are more likely to lean toward moving people (23%) rather than vehicles (16%).
- On the other hand, men who select an investment option are more equally divided in their opinions than women – 29 percent selected people-mover and 23 percent selected vehicle-mover.

While over half of all boarding mode segments agree that WSF should invest equally in moving people and vehicles, current walk-on passengers are more likely than vehicle drivers or passengers to choose a specific investment strategy.

- Nearly half (49%) of all walk-on riders choose an investment strategy compared to 43 percent of drivers and 37 percent of vehicle passengers.
- Moreover, walk-on passengers' preferences are clear with more than four times as many walk-on passengers selecting moving people (40%) over moving vehicles (9%).

To a large extent, differences in attitudes toward where WSF should focus its future improvement efforts reflect the type of passengers on the route.

- Riders on the Seattle / Bremerton and Seattle / Bainbridge routes are most likely to feel that WSF should focus its investments on moving people – 36 and 34 percent, respectively. These routes have the highest percentage of walk-on passengers.
- Riders on the Mukilteo / Clinton and, to a somewhat lesser extent, Edmonds / Kingston are also more likely than riders on other routes to suggest that WSF should focus its improvement efforts on moving vehicles – 29 and 27 percent, respectively. Eighty percent (80%) of all riders on Mukilteo / Clinton and 74 percent of those on Edmonds / Kingston drive onto the ferry (as a driver or as a passenger in a vehicle).

As frequency of riding increases, so does support for increased investments in moving people.

- The system's most frequent riders are more than twice as likely as occasional riders (those taking fewer than seven one-way trips monthly) and nearly twice as likely as moderate riders (those taking 7 to 24 trips monthly) to feel that WSF should invest in moving people – 40 percent compared to 18 and 23 percent, respectively.

## Detailed Findings – Attitudes toward Where WSF Should Focus its Future Improvement Efforts

Respondents were asked to indicate if WSF should focus its improvements on becoming primarily a people-mover (vehicles are secondary) or a vehicle-mover (people are secondary) system or should they continue to invest equally.

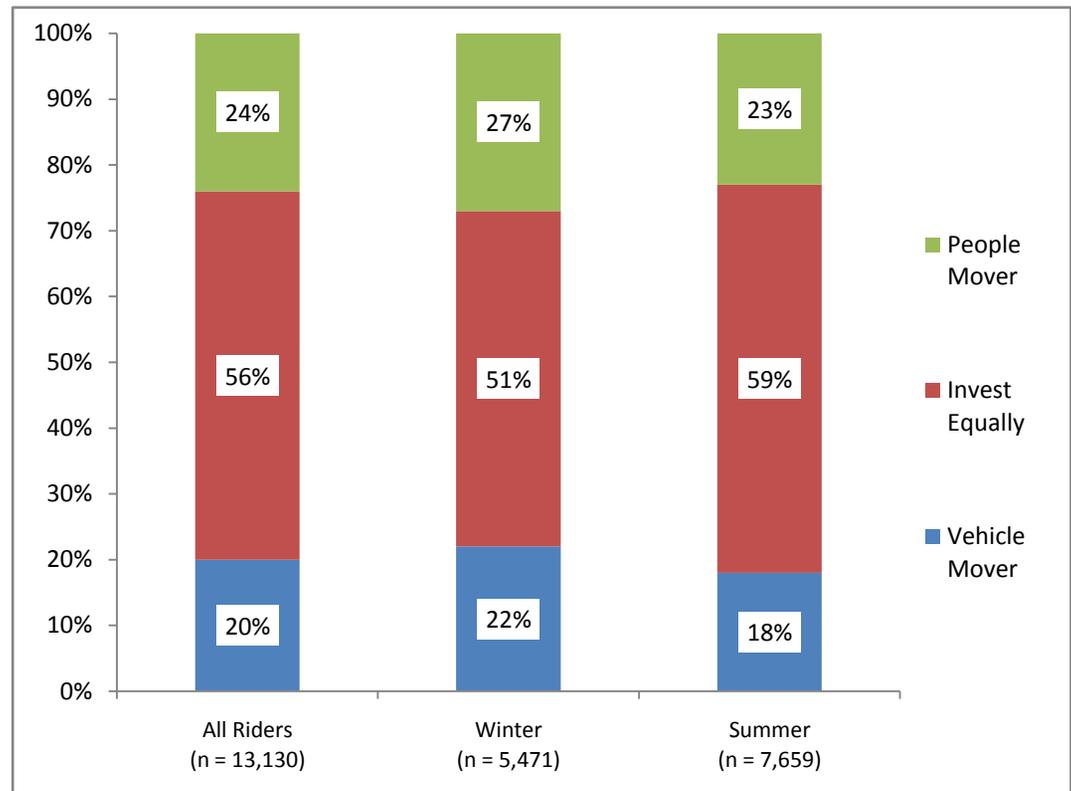
### All Riders: Attitudes toward Where WSF Should Focus its Future Improvement Efforts

The majority (56%) of all WSF riders feels that WSF should focus its improvements equally on moving vehicles and people.

- A greater percentage of summer than winter riders feel WSF should invest equally in moving vehicles and people – 59 percent compared to 51 percent, respectively. This could reflect the nature of summer travel. In addition, the summer travelers may be less knowledgeable about how the system operates.

The remaining riders' opinions are divided with somewhat more riders leaning toward WSF focusing its improvements on moving people – 24 percent “people mover” compared to 20 percent “vehicle mover.”

**Figure 35: Attitudes toward Where WSF Should Focus its Future Improvement Efforts**



Question: Washington State Ferries is both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a people-mover (vehicles are secondary) or a vehicle-mover (people are secondary) system or should it continue to invest equally?

## **Demographic Characteristics: Attitudes toward Where WSF Should Focus its Future Improvement Efforts**

These three segments differ demographically. Key differences are highlighted below:

**Gender:** Men are more likely than women to choose a specific investment / improvement opportunity. More than three out of five (61%) women feel that WSF should invest equally compared to only half (51%) of men.

- Of those who believe that WSF should invest equally, 56 percent are women.
- Those women selecting an investment option are more likely to lean toward moving people (23%) than vehicles (16%).
- Those men selecting an investment option are more equally divided in their opinions than women – 27 percent selected people mover and 23 percent selected vehicle mover.

**Age:** Riders who feel that WSF should move people are younger.

- More than two out of five (43%) riders who feel WSF should focus its improvements on moving people are under 45. Looking at this another way, while the majority (53%) of those 16 to 44 feels that WSF should invest equally in moving people and vehicles, those suggesting an investment strongly lean toward moving people (29%) rather than vehicles (18%).
- Older riders are more likely to say that WSF should invest equally. Sixty-two percent (62%) of those 65 and older and 58 percent of those between 55 and 64 feel that WSF should invest equally. Those 65 and older selecting an investment option lean heavily toward moving vehicles (24%) rather than people (14%).

**Employment:** Riders who feel that WSF should move people are more likely to be employed full-time (70%).

There are no significant differences by income.

**Table 57: Demographic Characteristics of Investment / Improvement Segments**

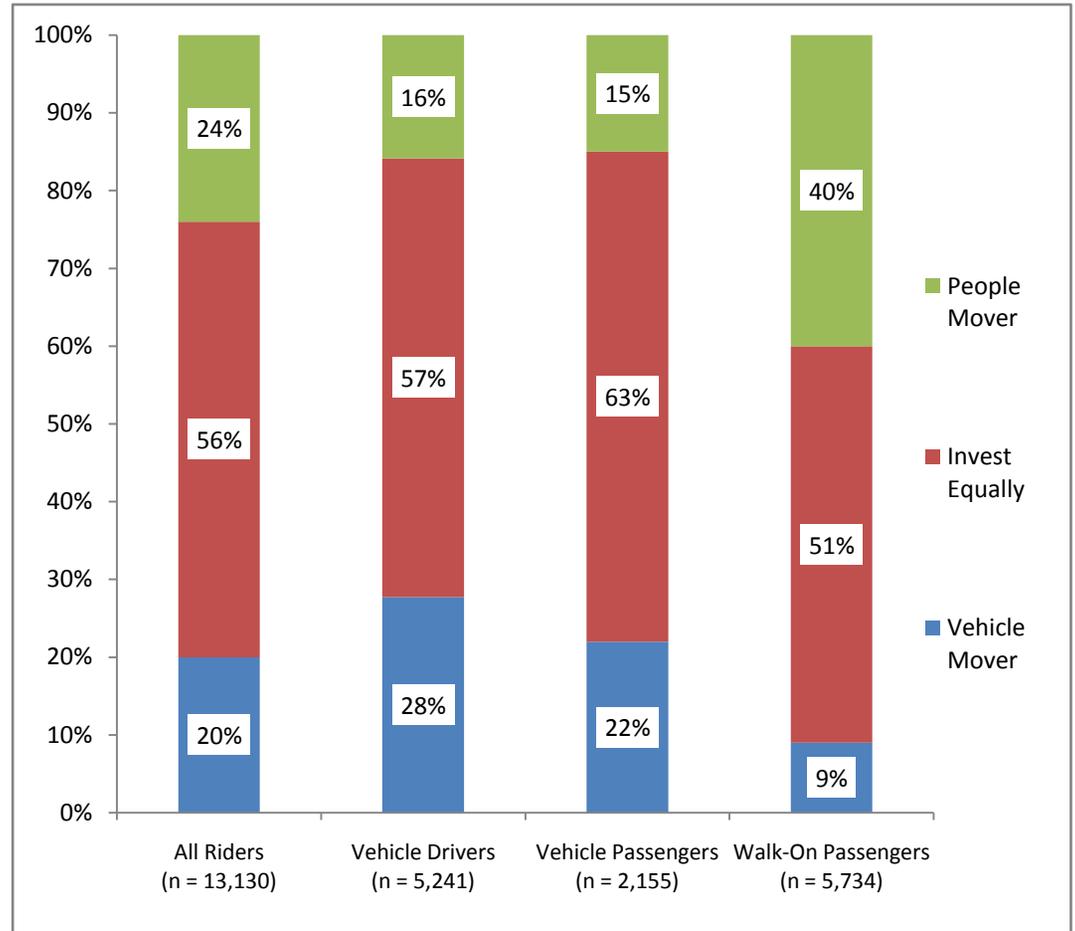
	All Riders (n = 13,130)	People Mover (n = 3,446)	Invest Equally (n = 6,663)	Vehicle Mover (n = 2,234)
<b>Gender</b>				
Male	48%	<b>51%</b>	44%	<b>57%</b>
Female	52	<b>49</b>	<b>56</b>	43
<b>Age</b>				
16 – 17	1%	1%	1%	1%
18 – 24	6	<b>8</b>	6	5
25 – 34	11	<b>14</b>	11	11
35 – 44	17	<b>20</b>	16	16
45 – 54	25	26	24	25
55 – 64	26	24	27	25
65 Plus	14	8	16	18
Median	51.0	48.0	51.8	52.1
<b>Employment</b>				
Full-Time	61%	<b>70%</b>	58%	61%
Part-Time / Student	15	<b>16</b>	<b>16</b>	12
Self-Employed	1	1	1	1
Retired	16	9	<b>18</b>	<b>20</b>
Other	7	4	<b>8</b>	<b>7</b>
<b>Household Income</b>				
< \$15,000	4%	<b>4%</b>	<b>4%</b>	2%
\$15,000 - \$35,000	10	9	10	8
\$35,000 - \$50,000	11	10	12	11
\$50,000 - \$75,000	21	20	21	24
\$75,000 - \$100,000	19	18	19	19
\$100,000 - \$150,000	20	22	20	20
\$150,000 Plus	15	15	15	17
Median	\$80,703	\$82,956	\$79,560	\$82,064

## Boarding Mode Analysis: Attitudes toward Where WSF Should Focus its Future Improvement Efforts

While over half of all boarding mode segments agree that WSF should invest equally in moving people and vehicles, current walk-on passengers are more likely than vehicle drivers or passengers to choose a specific investment strategy. Moreover, their preference is clear with more than four times as many walk-on passengers selecting moving people (40%) over moving vehicles (9%).

- Walk-on passengers are the least likely to suggest that WSF should invest equally in moving people and vehicles (51%).
- Vehicle passengers are the most likely segment to suggest that WSF should invest equally (63%). This may reflect that vehicle passengers at least occasionally walk onto the ferries as well. Vehicle passengers who select a specific strategy lean towards moving vehicles (22%) over moving people (15%).
- Nearly three out of five (57%) vehicle drivers feel that WSF should invest equally. Nearly twice as many vehicle select vehicle mover (28%) over people mover (16%).

**Figure 36: Attitudes toward Where WSF Should Focus its Future Improvement Efforts by Boarding Mode**



*Question: Washington State Ferries is both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a people-mover (vehicles are secondary) or a vehicle-mover (people are secondary) system or should it continue to invest equally?*

## Route Level Analysis: Attitudes toward Where WSF Should Focus its Future Improvement Efforts

The majority of riders on all routes feels that WSF should invest equally in moving people and vehicles.

### Anacortes (Sidney and San Juans)

Riders on the **Anacortes / Sidney** and, to a somewhat lesser extent, **Anacortes / San Juans** routes are the most likely to suggest that WSF invest equally – 68 and 61 percent, respectively. However, an above-average percentage (24%) of Anacortes / San Juans riders also suggest that WSF should invest in moving vehicles. This is due largely to differences in attitudes between winter and summer riders on this route.

- Summer riders on the Anacortes / San Juans route are more likely than winter riders to suggest that WSF invest equally – 64 percent compared to 54 percent, respectively. Winter riders are almost twice as summer riders to feel that WSF should invest in moving vehicles – 35 percent compared to 19 percent, respectively.

To a large extent, the differences in attitudes toward where WSF should focus its future improvement efforts reflect the type of passengers on the route.

### Seattle / Bremerton and Seattle / Bainbridge

Riders on the **Seattle / Bremerton** and **Seattle / Bainbridge** routes are the most likely to feel that WSF should focus its investments on moving people – 36 and 34 percent, respectively. These routes have the highest percentage of walk-on passengers – 63 percent for Seattle / Bremerton and 48 percent for Seattle / Bainbridge.

- Half (50%) of Seattle / Bremerton and 47 percent of Seattle / Bainbridge walk-on passengers feel that WSF should invest in moving people more effectively.

### Keystone / Port Townsend

While a higher than average percentage of riders on the **Keystone / Port Townsend** route feel that WSF should invest equally, riders on this route are the most likely to suggest that WSF invest in moving vehicles.

- Seventy-eight percent (78%) of all passengers on this route drive onto the ferry as a driver or as a passenger in a vehicle. Nearly two out of five (39%) vehicle drivers on this route feel that WSF should invest in moving vehicles.

### Mukilteo / Clinton and Edmonds / Kingston

Riders on the **Mukilteo / Clinton** and, to a somewhat lesser extent, **Edmonds / Kingston** are also more likely than riders on other routes to suggest that WSF should focus its improvement efforts on moving vehicles – 29 and 27 percent, respectively.

- Eighty percent (80%) of all riders on Mukilteo / Clinton and 74 percent of those on Edmonds / Kingston drive onto the ferry (as a driver or as a passenger in a vehicle). Among vehicle drivers, the percentage suggesting investing in moving vehicles increases somewhat – 34 percent for Mukilteo / Clinton vehicle drivers and 33 percent for Edmonds / Kingston vehicle drivers.

- Winter riders on both these routes are more likely than summer riders to suggest that WSF should invest in moving vehicles. One out of three (33%) winter riders on Mukilteo / Clinton suggest investing in moving vehicles compared to 25 percent of summer riders. Thirty percent (30%) of winter riders on Edmonds / Kingston suggest greater investment in moving vehicles compared to 25 percent of summer riders. Summer riders on both these routes are more likely to suggest investing equally.

### Faultleroy / Vashon and Faultleroy / Southworth

An above average percentage of **Faultleroy / Vashon** passengers (32%) also feel that WSF should focus its improvements on moving people. This is interesting in that 70 percent of all riders on this route drive onto the ferry (as a driver or as a passenger in a vehicle). It is likely that this difference reflects the fact that there was passenger-only ferry service on this route in the past and riders on this route have been relatively vocal about getting passenger-only service to the island. King County currently has some preliminary plans to provide passenger-only service to Vashon.

- Forty-six percent (46%) of Faultleroy / Vashon walk-on passengers feel that the ferry system should invest in moving people; 28 percent of vehicle drivers feel the same way.

Finally, **Faultleroy / Southworth** passengers choosing not to invest equally have the most equally divided opinions – 27 percent say WSF should invest to move people and 20 percent say it should invest to move vehicles.

- Walk-on passengers on Faultleroy / Southworth are nearly seven times as likely to feel WSF should invest in moving people over vehicles – 48 percent compared to 7 percent, respectively. On the other hand, nearly twice as many vehicle drivers feel that WSF should invest in moving vehicles over people – 29 percent compared to 17 percent, respectively.

**Table 58: Attitudes toward Where WSF Should Focus its Future Improvement Efforts by Route**

	All Riders (n=13,130)	SEA/ BAIN (n=4,600)	SEA/ BRE (n=1,567)	EDM/ KIN (n=2,413)	MUK/ CLI (n=1,789)	FAU/ VAS (n=503)	FAU/ SOU (n=547)	PTD/ TAH (n=147)	KEY/ PTT (n=432)	ANA/ SAN (n=923)	ANA/ SID (n=209)
<b>People Mover</b>	24%	<b>34%</b>	<b>36%</b>	16%	13%	<b>32%</b>	<b>27%</b>	20%	9%	15%	21%
<b>Invest Equally</b>	56%	55%	53%	56%	58%	50%	52%	63%	60%	<b>61%</b>	<b>68%</b>
<b>Vehicle Mover</b>	20%	11%	11%	<b>27%</b>	<b>29%</b>	18%	20%	17%	<b>32%</b>	24%	12%

Question: Washington State Ferries is both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a people-mover (vehicles are secondary) or a vehicle-mover (people are secondary) system or should it continue to invest equally?  
 Base: All Respondents

## Time of Day / Week Travel Analysis: Attitudes toward Where WSF Should Focus its Future Improvement Efforts

Peak weekday riders are the most likely to suggest that WSF should focus its improvement efforts on moving people. This is notable among peak weekday walk-on passengers and reflects the finding that a greater percentage of peak weekday riders walk onto the ferry.

- Thirty-one percent (31%) of all peak weekday riders and 48 percent of peak weekday walk-on riders say that WSF should focus its efforts on moving people.

**Table 59: Attitudes toward Where WSF Should Focus its Future Improvement Efforts by Time of Day / Week Travel and Boarding Mode**

	All Riders (n = 13,130)	Total Peak Weekday (n = 6,192)	Peak Weekday			Total Off-Peak Weekday (n = 3,278)	Off-Peak Weekday			Total Weekend (n = 3,660)	Weekend		
			Vehicle Driver (n = 2,219)	Vehicle Passenger (n = 685)	Walk-On (n = 3,288)		Vehicle Driver (n = 1,512)	Vehicle Passenger (n = 584)	Walk-On (n = 1,182)		Vehicle Driver (n = 1,510)	Vehicle Passenger (n = 886)	Walk-On (n = 1,264)
<b>People Mover</b>	24%	<b>31%</b>	16%	16%	<b>48%</b>	20%	14%	12%	<b>37%</b>	22%	18%	16%	<b>32%</b>
<b>Invest Equally</b>	56%	52%	<b>57%</b>	<b>62%</b>	45%	<b>59%</b>	59%	<b>67%</b>	55%	<b>56%</b>	53%	<b>62%</b>	55%
<b>Vehicle Mover</b>	20%	17%	<b>28%</b>	<b>23%</b>	7%	<b>20%</b>	<b>28%</b>	<b>20%</b>	8%	<b>22%</b>	<b>29%</b>	<b>22%</b>	13%

Question: Washington State Ferries is both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a people-mover (vehicles are secondary) or a vehicle-mover (people are secondary) system or should it continue to invest equally?

# Appendix

## On-Board Survey Background / Objectives & Methodology

### Background / Objectives

While Washington State Ferries (WSF) has routinely conducted Origin & Destination Surveys (1993, 1999, and 2006) as well as a Customer Survey on Amenities and Customer Satisfaction (2002), this research represents the first comprehensive survey of WSF customers – both their travel behaviors and attitudes. The key objectives for this on-board survey effort were in large part driven by the legislation that required this research and were further refined as follows:

- Develop and implement a quantitative research methodology that yields reliable and statistically valid baseline results. The legislation calls for an ongoing biennial survey effort. As such, the research needed to be designed with the following sub-objectives in mind:
  - The methodology must be replicable in future years.
  - The methodology must provide reliable data at an aggregate level and allow for reliable analysis among key customer segments, notably at the route level and by different types of passengers (boarding mode, trip purpose, frequency of travel, etc.).
- Provide a comprehensive demographic and travel behavior profile of WSF customers.
- Test customer attitudes toward possible changes in fare policies and/or operations.

### Methodology

#### *Sampling*

The overall objective in designing the sample plan was to obtain a representative sample of all ferry customers on all routes operated by WSF. The most effective and efficient means to accomplish this objective is through the use of a cluster sample. Cluster sampling is a technique used when "natural" groupings are evident in a statistical population – in this case a ferry trip. In this technique, the total population (all ferry customers), is divided into these groups (or clusters) and a sample of the trips is selected randomly. The survey is then administered to all riders on each selected trip.

The sample was stratified by route and the number of trips selected for each route was set to achieve a final number of surveys that is roughly proportionate to ridership on that route. The sample was further stratified by time of day. Since the focus of the study is on peak travel behavior and because the majority of ferry customers travels during peak travel periods, stratification will result in a roughly proportionate sample of peak and off-peak travelers (relative to their actual percent of the population). Sampling is at a rate of 75 percent peak / 25 percent off-peak trips, as illustrated in the following table.

**Table 60: Number of Sampled Trips Surveyed**

Route	Total Number of Yoked Trips Sampled	# of Peak Weekday	# of Peak Weekend	# of Off-Peak (Weekday & Weekend)
<b>March 2008</b>				
Seattle / Bainbridge	18	10	3	5
Seattle / Bremerton	6	4	1	1
Edmonds / Kingston	16	10	3	3
Mukilteo / Clinton	15	9	3	3
Fauntleroy / Vashon / Southworth	13	8	1	4
Point Defiance / Tahlequah	4	2	1	1
Keystone / Port Townsend	3	2	1	0
Anacortes / San Juans	2	1	1	0
<b>Total</b>	<b>77</b>	<b>46</b>	<b>14</b>	<b>17</b>
<b>July / August 2008</b>				
Seattle / Bainbridge	18	10	3	5
Seattle / Bremerton	6	4	1	1
Edmonds / Kingston	16	10	3	3
Mukilteo / Clinton	15	9	3	3
Fauntleroy / Vashon / Southworth	13	8	1	4
Point Defiance / Tahlequah	4	2	1	1
Keystone / Port Townsend	4	2	2	0
Anacortes / San Juans	4	2	2	0
Anacortes / Sidney	1	No winter service	1	
<b>Total</b>	<b>81</b>	<b>47</b>	<b>17</b>	<b>17</b>

Definitions for peak and off-peak travel times were provided by Washington State Ferries as follows:

- Morning Peak:** Eastbound trips that depart from the west side terminal between 5:30 and 9:00 a.m. Exception being Keystone / Port Townsend which are westbound trips departing from Keystone between 5:30 and 9:00 a.m.
- Afternoon Peak:** Westbound trips that depart from the east side terminal between 3:00 and 7:00 p.m. Again Keystone / Port Townsend are eastbound trips (departing from Port Townsend) during these times.
- Weekend Peak:** Westbound trips originating between 8:00 a.m. and Noon on Saturdays and eastbound trips originating between Noon and 8:00 p.m. on Sundays.
- Off-Peak:** All other weekday trips between 9:05 a.m. and 3:00 p.m. and from 7:05 p.m. to the last sailing.

Sampled trips were “yoked” or paired with a return trip departing approximately 30 to 60 minutes after the sampled trip was completed. This allowed the survey personnel to return to their origin. With this pairing, surveys were scheduled to be distributed on 316 one-way trips. In actuality, surveys were distributed on 325 trips. The table below provides the breakdown of the final sampled trips.

**Table 61: Total Number of One-Way Trips Surveyed**

Route	Winter 2008		Summer 2008	
	# of One-Way Trips (Planned)	# of One-Way Trips Actual	# of One-Way Trips (Planned)	# of One-Way Trips Actual
Seattle / Bainbridge	36	35	36	36
Seattle / Bremerton	12	10	12	10
Edmonds / Kingston	32	37	32	45
Mukilteo / Clinton	30	36	30	30
Fauntleroy / Vashon / Southworth	26	26	26	34
Point Defiance / Tahlequah	8	10	8	8
Keystone / Port Townsend	6	6	8	8
Anacortes / San Juans	4	4	8	8
Anacortes / Sidney	No winter service		2	2
Total	154	164	162	181

**Data Collection and Interviewing Outcomes**

Data collection occurred over a four week period during each survey wave. Each route or route group was surveyed over the course of a one-way week period. Trained survey personnel, accompanied by a supervisor, distributed surveys in advance of and during the scheduled trip. This ensured distribution only to passengers on the sampled trip. Survey personnel continued to distribute and pick-up surveys on both the passenger and vehicle decks throughout the trip. In addition, respondents were given the option to return the survey by mail (postage pre-paid) or on-line. In total more than 63,000 passengers were approached and more than 13,000 surveys returned. Returns by route are shown in the table below.

**Table 62: Number of Completed Surveys – Overall and by Route**

Route	Total	Winter 2008	Summer 2008
Seattle / Bainbridge	4,600	2,060	2,540
Seattle / Bremerton	1,567	758	809
Edmonds / Kingston	2,413	996	1,417
Mukilteo / Clinton	1,789	646	1,143
Fauntleroy / Vashon	503	251	252
Fauntleroy / Southworth	547	268	279
Point Defiance / Tahlequah	147	93	54
Keystone / Port Townsend	432	128	304
Anacortes / San Juans	923	271	652
Anacortes / Sidney	209	No winter service	
Total	13,130	5,471	7,659

## Questionnaire

The questionnaire was developed with input from members of the WSTC, WSF planning staff, the Ferry Advisory Executive Council, and a volunteer consultant advising WSTC on the survey process. The questionnaire also included a request for passengers to complete the additional pricing and strategy research. This research was conducted on-line. Just over 4,000 or 37 percent of those completing the on-board survey agreed to participate in this additional research and provided contact information.

## Weighting

The data was weighted based on the sampling to ensure that the results of the survey represented the actual number of boardings during the sampled travel periods within each route. Data is weighted by boarding mode for the sampled trip and time boarded within route. Ridership data for weighting was provided by WSF for each survey way to correspond to the exact week during which a specific route was surveyed. The number of passengers surveyed on each route by key strata and the final weighted cell sizes are shown in the table below.

**Table 63: Sample Sizes – Weighted and Unweighted**

Route	Final Sample Size	% of Sample	Weighted Sample Size	% of Sample	Expanded Sample Size	% of Weekly Trips
<b>Winter 2008</b>						
Seattle / Bainbridge	2,060	38%	1,511	28%	113,582	28%
Seattle / Bremerton	758	14%	612	11%	46,043	11%
Edmonds / Kingston	996	18%	1,046	19%	78,663	19%
Mukilteo / Clinton	646	12%	973	18%	73,128	18%
Fauntleroy / Vashon	251	5%	495	9%	37,232	9%
Fauntleroy / Southworth	268	5%	207	4%	15,582	4%
Point Defiance / Tahlequah	93	2%	152	3%	11,448	3%
Keystone / Port Townsend	128	2%	129	2%	9,664	2%
Anacortes / San Juans	271	5%	346	6%	26,036	6%
<b>Total</b>	<b>5,471</b>		<b>5,471</b>		<b>411,377</b>	
<b>Summer 2008</b>						
Seattle / Bainbridge	2,540	33%	2,029	26%	149,428	26%
Seattle / Bremerton	809	11%	859	11%	63,244	11%
Edmonds / Kingston	1,417	19%	1,335	17%	98,335	17%
Mukilteo / Clinton	1,143	15%	1,247	16%	91,838	16%
Fauntleroy / Vashon	252	3%	617	8%	45,439	8%
Fauntleroy / Southworth	279	4%	301	4%	22,148	4%
Point Defiance / Tahlequah	54	1%	200	3%	14,726	3%
Keystone / Port Townsend	304	4%	209	3%	15,383	3%
Anacortes / San Juans	652	9%	737	10%	54,294	10%
Anacortes / Sidney	209	3%	126	2%	9,265	2%
<b>Total</b>	<b>7,659</b>		<b>7,659</b>		<b>564,099</b>	

# Relevant Questionnaire Sections

## Color Codes:

Q# Winter and Summer Question

Q# Winter Question

Q# Summer Question

## Questions: Reservations

One strategy under consideration is a **Vehicle Reservation System** that would allow people to **Call Ahead or Go On-Line to Make a Reservation for a Specific Trip**. To what extent do you agree or disagree with each of the following statements about a **Reservation System**?

	Strongly Disagree		Neither		Strongly Agree
Q# A <b>Specific But Limited Amount Of Reserved Space For Vehicles</b> should be set aside on each boat for those making advance reservations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# If a reservation customer does not arrive on time their <b>Space Would Be Released</b> for general boarding and they would <b>Forfeit Their Reserved Space and Payment</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# <b>Regular Riders</b> with a <b>Monthly Pass</b> Should Be Given Priority when making vehicle reservations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# Customers with a vehicle reservation should <b>Pay A Premium</b> over the regular vehicle ticket price	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# Only those routes with <b>High Recreational / Tourist Travel</b> should have a vehicle reservation system	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# <b>Frequent Users</b> would be able to conveniently <b>Reserve A Full Week's Travel With One Visit</b> to the reservation system	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Q# The <b>Reservation System Would Inform People</b> on how much <b>Capacity</b> is reserved, how much is available for reservation, and how much is open for first come, first serve	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**QU** Assume that the Average Non-Discounted Vehicle Fare on these routes is is [ROUTE GROUP FARE SHOWN] and it is only charged one-way. We have again chosen this as the average, non-discounted fare, to ensure that all respondents are using the same base fare for their answers.

To what extent Would You Be Willing To Pay each of the following Additional Premiums Over The is [ROUTE GROUP FARE SHOWN] Vehicle Fare for a Guaranteed Space on the ferry for your Vehicle at a Specific Boarding Time for your typical trip?

	Not At All Willing		Neutral		Very Willing
\$1.15	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
\$2.30	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
\$3.80	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
\$5.80	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
\$11.55	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

## Questions: Preferred Vehicle Lanes

**Q26)** Another strategy is to have a 'Preferred Vehicle Lane' that would allow some riders **With a Specific Pass or Ticket to Move More Quickly Through The Ticketing And Loading Process.** To what extent do you **Agree** or **Disagree** with each of the following statements about this strategy?

	Strongly Disagree		Neither		Strongly Agree
A <b>Specific but Limited Amount Of Space For Vehicles</b> should be set aside on each boat for those using the Preferred Vehicle Lane	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Regular Riders using Pre-Paid Tickets</b> should be the <b>Only Ones Able</b> to use the Preferred Vehicle Lane	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Customers using the Preferred Vehicle Lane <b>Should Pay A Premium</b> over the regular fare for this route	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Customers using the Preferred Vehicle Lane with pre-paid tickets should be <b>Allowed Faster Access To The Dock Holding Area</b> for the next sailing than regular users	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
The Preferred Vehicle Lane should <b>Give Vehicle Passengers</b> with pre-paid tickets <b>Priority Boarding</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**Q29)** Assume that the **Average Vehicle Fare** for **Ticket Holders** on these routes is **[ROUTE GROUP FARE SHOWN]** and it is only charged one-way. We have again chosen this as the average, non-discounted fare, to ensure that all respondents are using the same base fare for their answers. To what extent **Would You Be Willing To Pay** each of the following **Additional Premiums Over** is **[ROUTE GROUP FARE SHOWN]** to use a **Preferred Vehicle Lane** for your typical trip?

	Not At All Willing		Neutral		Very Willing	
\$0.90	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
\$1.85	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
\$3.05	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
\$4.60	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
\$9.24	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

## Questions: High Occupancy Toll (HOT) Lanes

**Q30)** To what extent do you **AGREE** or **DISAGREE** WSF should **DO** the following?

	Strongly Disagree		Neither		Strongly Agree
Institute a High Occupancy Toll (HOT) program. During Peak Travel Periods, only vehicles with 2 or more persons would be allowed to board at the posted fares. Those vehicles with a single occupant would have to pay a premium fare during peak periods	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

## Questions: Attitudes toward Fare Collection Strategies

**Q21)** WSF is considering some **Policies to Improve The Flow Of People And Vehicles** onto the boats. To what extent do you **Agree** or **Disagree** WSF should **Do** each of the following?

	Strongly Disagree		Neither		Strongly Agree
<b>Eliminate Ticket Purchases At Ticket Counters</b> for <b>walk-on</b> passengers (i.e., all fares must be pre-paid)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Eliminate Ticket Purchases At Toll Booths</b> for <b>drive-on</b> passengers (i.e., all fares must be pre-paid)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>On-Board Ticketing</b> (riders who do not pre-pay fares pay on board instead of at the toll booth / in terminals)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Offer A Discount</b> to drive-on passengers if <b>Purchase Round Trip Tickets</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Limit Forms of Payments</b> for vehicle passengers purchasing tickets at toll booths ( <b>cash or pre-paid only</b> )	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Use <b>In-Vehicle Transponders</b> to collect fares tied to pre-paid credit or debit card accounts	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Change layout of ticket booths</b> so two vehicles can pay simultaneously	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<b>Offer a stored value card:</b> Users place a specified amount of money on the card. When they take a trip, the cost of the ride at the posted fare is debited from the card	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**Questions: Attitudes toward Strategies to Improve Real Time Customer Information**

**Q31)** Finally, WSF is considering strategies to **Improve Real Time Customer Information**. To what extent do you **AGREE** or **DISAGREE** WSF should **DO** each of the following?

	Strongly Disagree		Neither		Strongly Agree	
Use <b>Technologies</b> such as variable message signs <b>To Alert Drivers To Wait Times</b> in holding area and on key highways / roadways serving the ferries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 5
Use <b>E-Mail Alerts</b> to provide <b>Accurate</b> and <b>Timely</b> announcements of service or schedule changes or boat delays	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 5
Improve placement of <b>Web Cams</b> in vehicle loading areas and holding lanes on streets / highways so riders can judge wait times	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 5

**Questions: Attitudes toward Where WSF Should Focus its Future Improvement Efforts**

**Q15)** Washington State Ferries (WSF) has tried to be both a vehicle and people mover. In **Thinking About the Future of WSF**, the ferries could focus its **Investment** and **Operational Improvements** on being primarily a **People-Mover** system that also carries vehicles or primarily a **Vehicle-Mover** system that also carries people or it could continue as it is now.

In the future and in order to become a more efficient system, **Should WSF Focus Its Improvements** on becoming a **People-Mover** or a **Vehicle-Mover** system or should they continue to **Invest Equally**?

Strongly Think it Should Invest in Being a **PEOPLE-MOVER** System

Invest Equally

Strongly Think it Should Invest in Being a **VEHICLE-MOVER** System

-3

-2

-1

0

+1

+2

+3

**Q17)** Washington State Ferries is both a vehicle and people mover. In the future and in order to become a more efficient system, **Should WSF Focus Its Improvements** on becoming primarily a **People-Mover** (vehicles are secondary) or a **Vehicle-Mover** (people are secondary) system or should they continue to **Invest Equally**?

Strongly Think it Should Invest in Being a **PEOPLE-MOVER** System

Invest Equally

Strongly Think it Should Invest in Being a **VEHICLE-MOVER** System

-3

-2

-1

0

+1

+2

+3

