

Washington State Ferries

2006 Origin/Destination Onboard Survey

Summary Report

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October 30, 2007



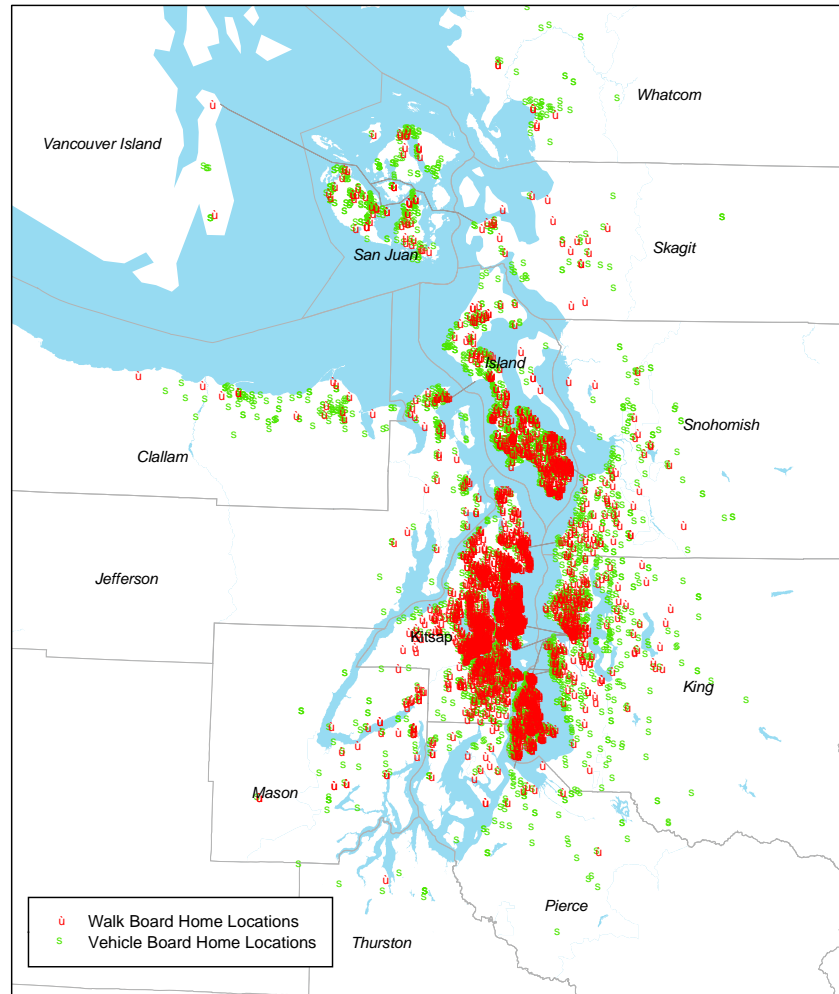
Purpose of the Origin-Destination Onboard Survey

- To capture accurate measures of customer travel patterns and support analysis to -
 - Identify significant trends in ridership travel characteristics
 - Update data inputs to ferry travel model for use in WSF Long-Range Plan
 - Provide input to terminal capital improvement projects

- WSF now has a series of similar surveys from which to compare data -
 - 1993, 1999, and 2006
 - Surveys taken during “average” months of May or October

Home Locations for Weekday Riders

Weekday Market Served - Rider Home Locations for All Routes



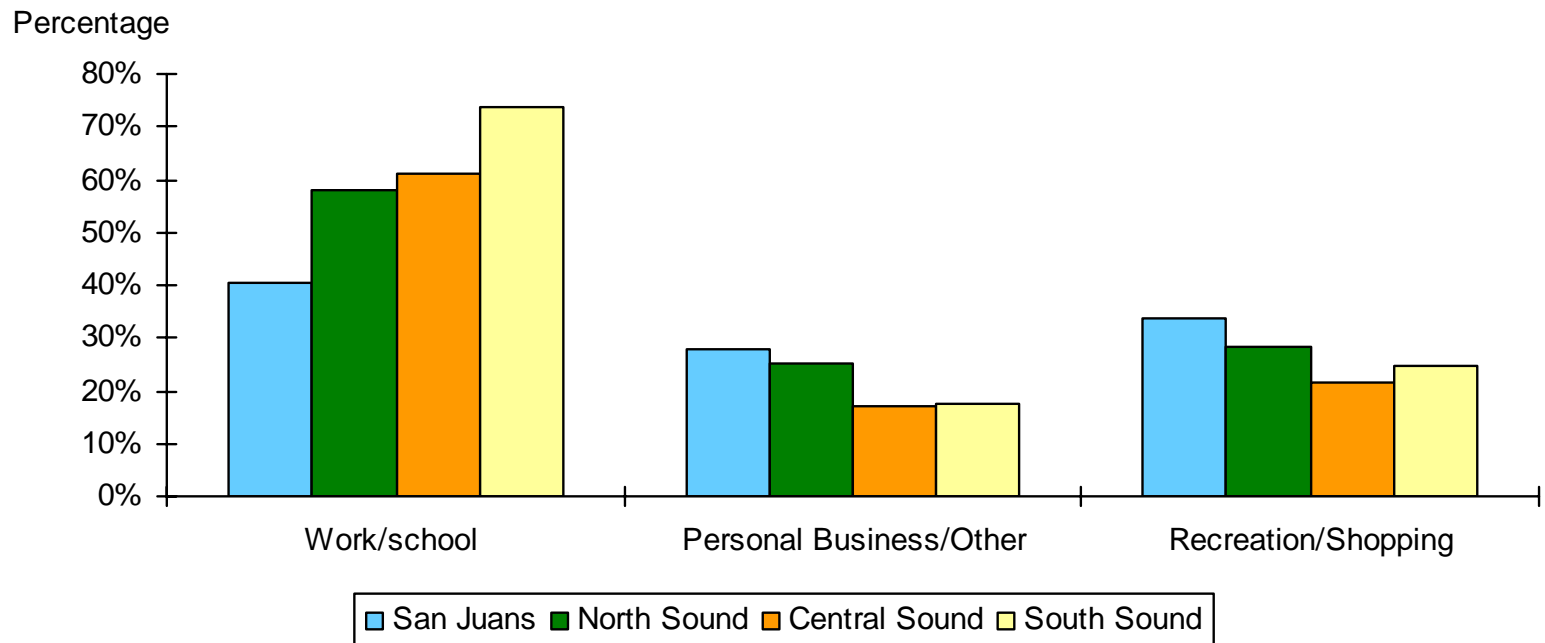
Service Area Corridors

- San Juan Island Corridor
 - Serves San Juan Islands, and Sidney, BC
- North Sound Corridor
 - Serves Whidbey Island and points north
- Central Sound Corridor
 - Serves Bainbridge Island, North /Central/South Kitsap County, and the Olympic Peninsula
- South Sound Corridor
 - Serves South Kitsap County and Vashon Island

Snapshot of the System

Trip Purpose

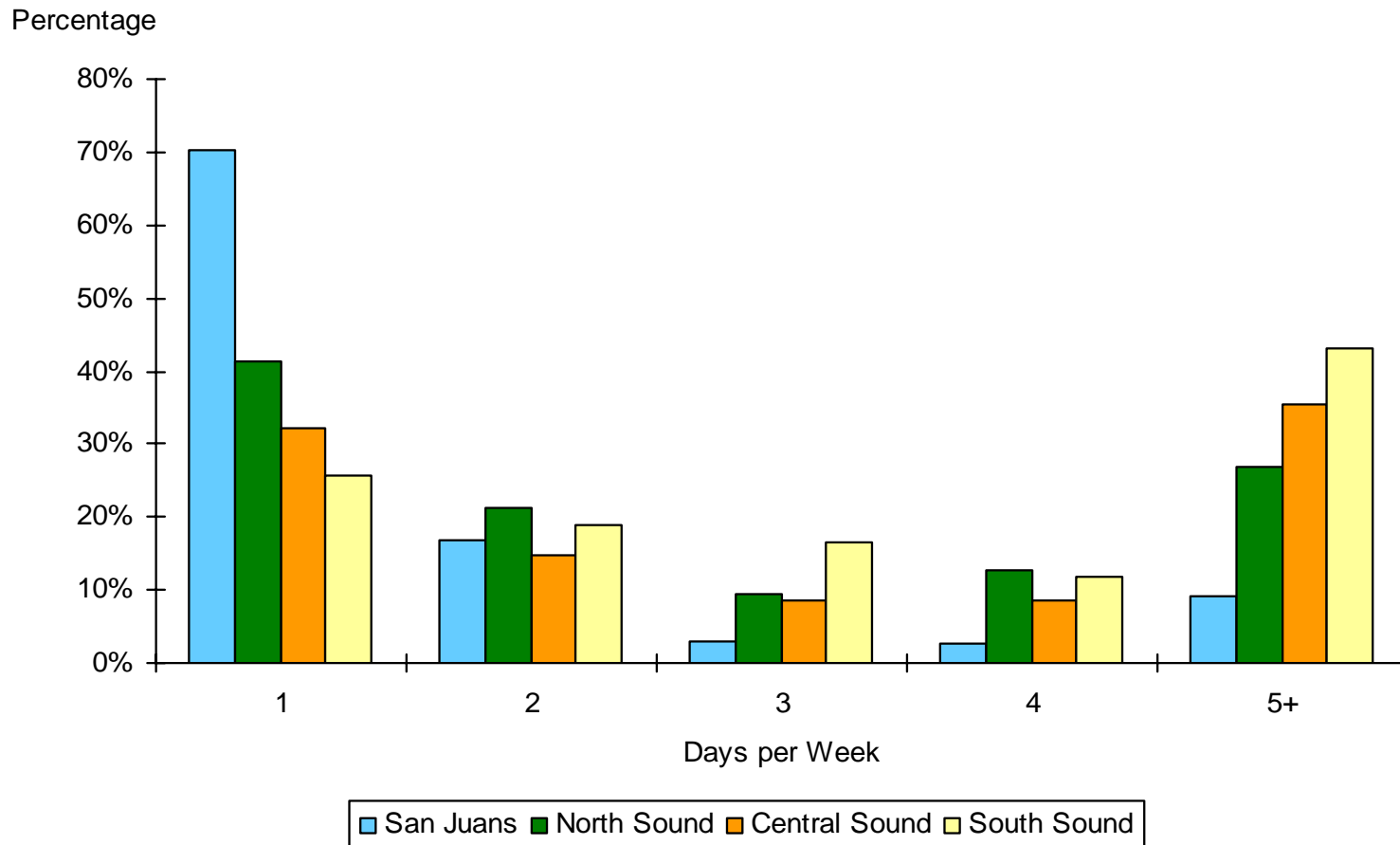
- Work trips are proportionately higher in the southern routes, lowest in the north.
- Personal business/other trips are higher in the northern routes, lowest in the south.
- Recreational trips are highest in the northern routes, lowest in the central sound.



Snapshot of the System

Frequency of Travel

- More weekday travelers in the South Sound Corridor are likely to travel four or five days per week than in any other corridor



Systemwide Background Trends

▪2006 System

- 65,300 riders per day
(10 percent decrease)
- \$10.49 average vehicle fare
(39 percent increase)
- \$5.76 average passenger fare
(43 percent increase)

▪1999 System

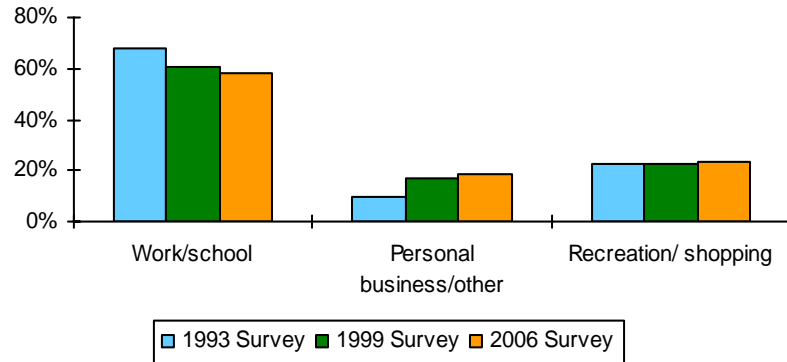
- 72,200 riders per day
(63,300 riders per day in 1993)
- \$7.55 average vehicle fare
(in 2006 dollars)
- \$4.02 average passenger fare
(in 2006 dollars)

Systemwide Trends – 1993, 1999, 2006

Trip Purpose

Weekday Riders

Percent of Daily Travel

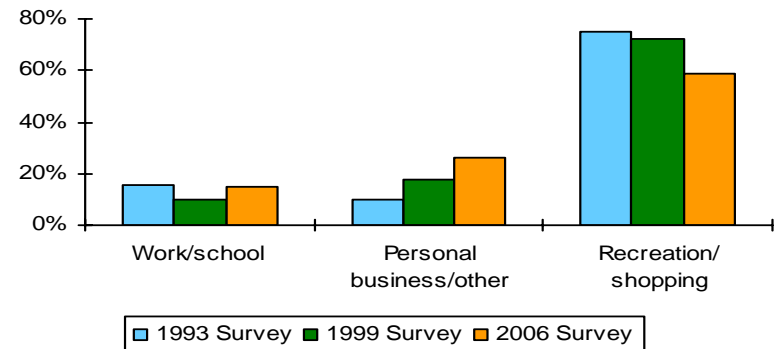


- Work trips are declining as a percent of weekday travel

- Recreation trips are declining as a percent of weekend travel

Weekend Riders

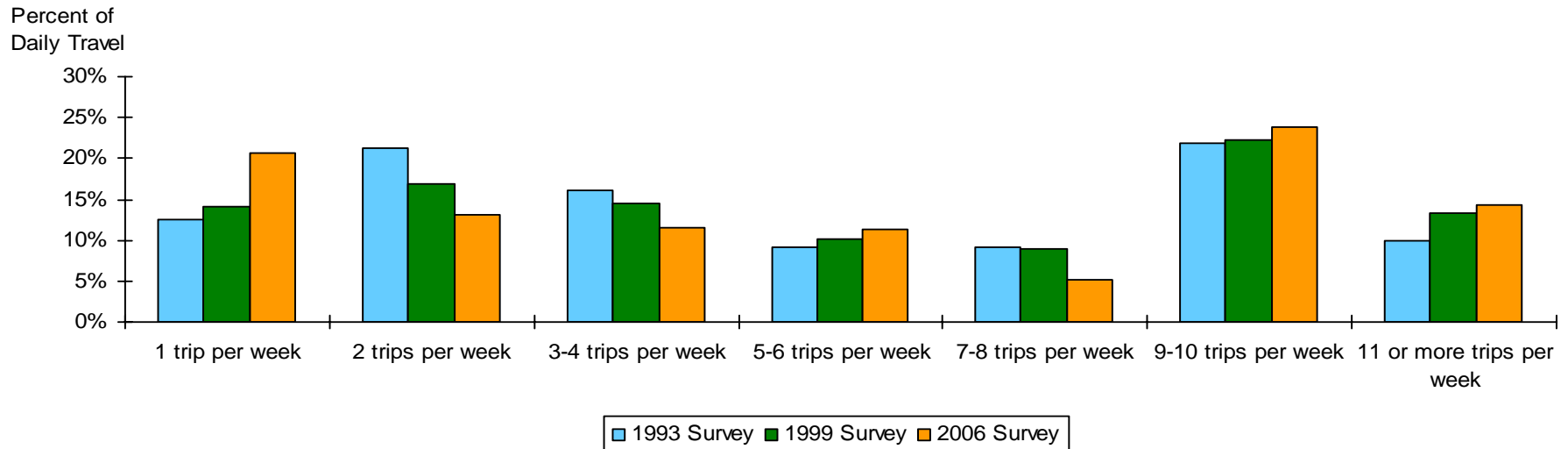
Percent of Daily Travel



Systemwide Trends – 1993, 1999, 2006

Frequency of Travel

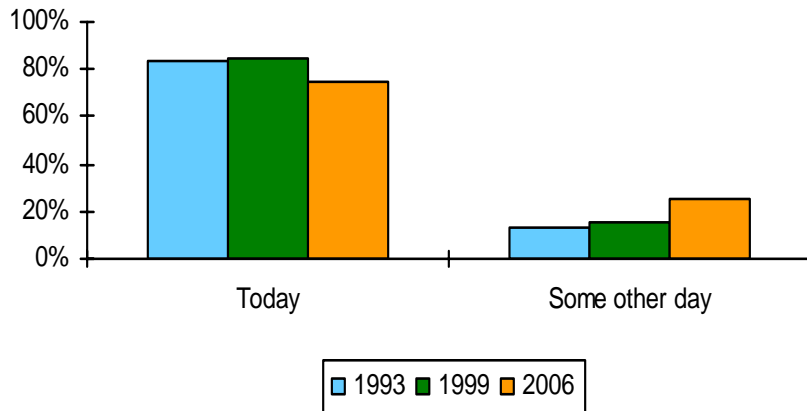
- Average number of trips per week have declined slightly since 2006



Systemwide Trends – 1993, 1999, 2006

Round Trip Characteristics

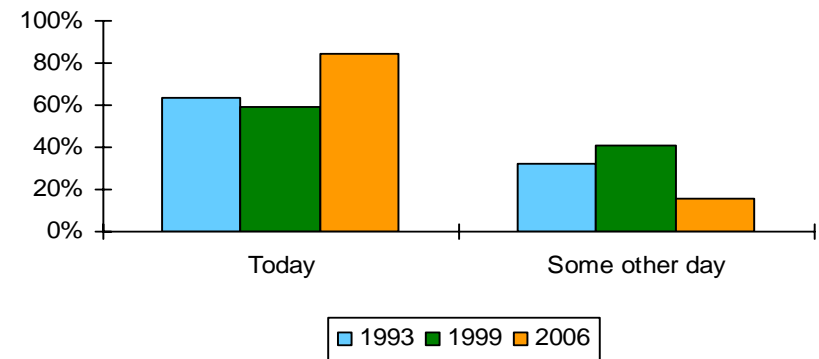
Weekday Travelers



- Weekday travelers are slightly more likely to return on a different day

- Saturday travelers are less likely to return on a different day than Sunday travelers

Weekend Travelers

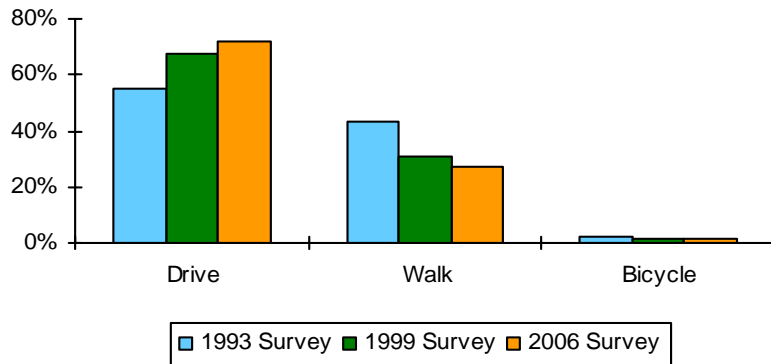


Systemwide Trends – 1993, 1999, 2006

Boarding Mode

Weekday Riders

Percent of
Daily Travel

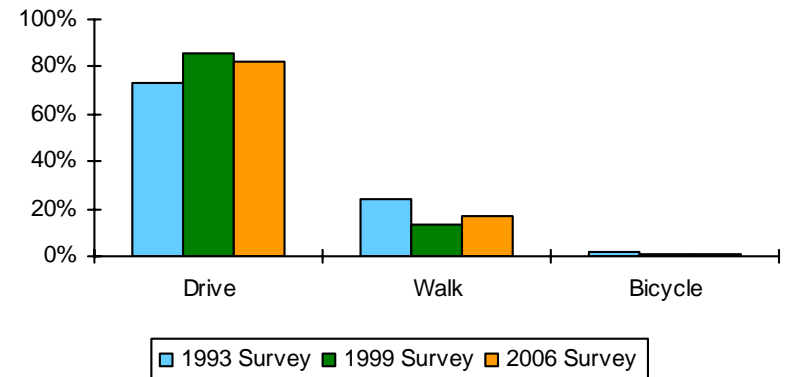


- A slightly higher proportion of weekend riders are boarding as foot passengers

- A slightly higher proportion of weekday riders are boarding in vehicles

Weekend Riders

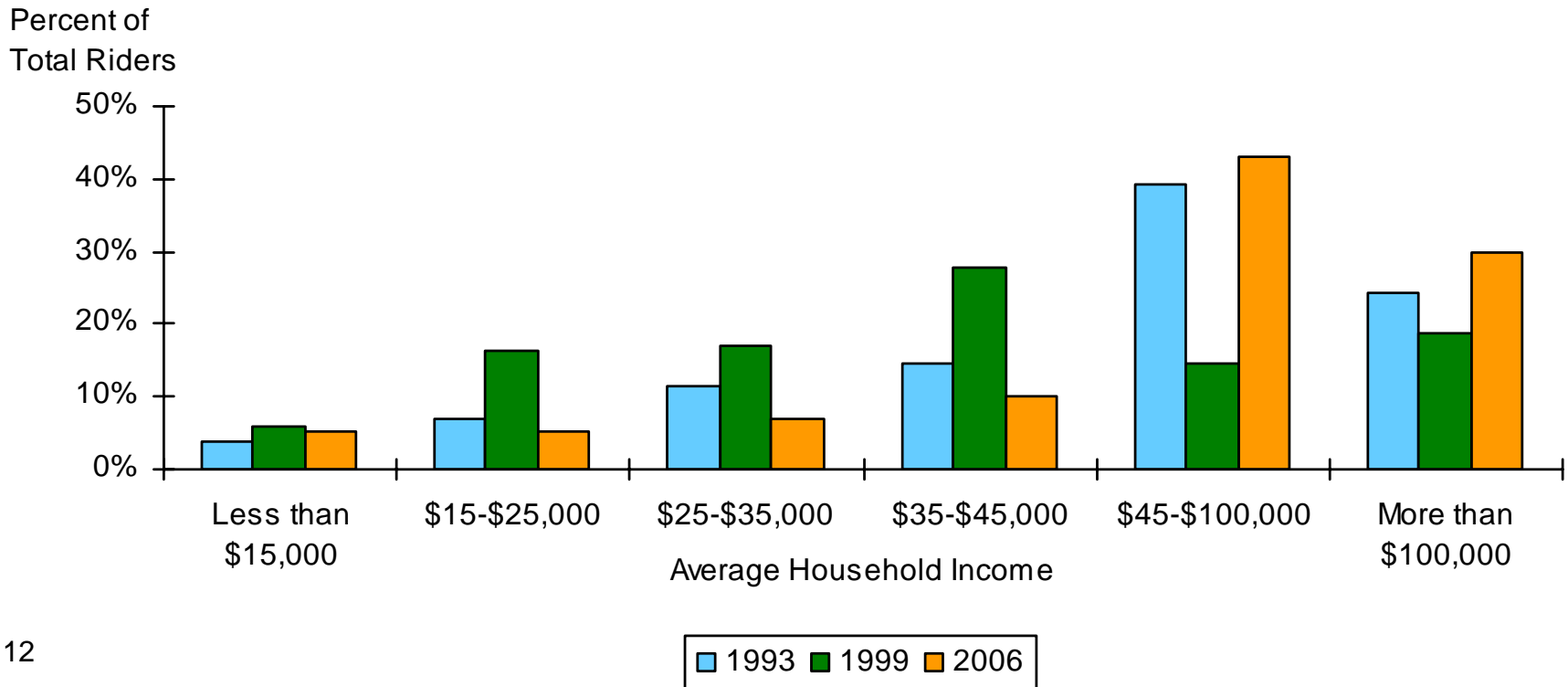
Percent of
Daily Travel



Systemwide Trends

Average Household Income for Ferry Riders

- Proportionately fewer low and middle income people are riding ferries in 2006 compared to 1999
- Income distribution of 2006 ferry riders more closely resembles 1993 than 1999

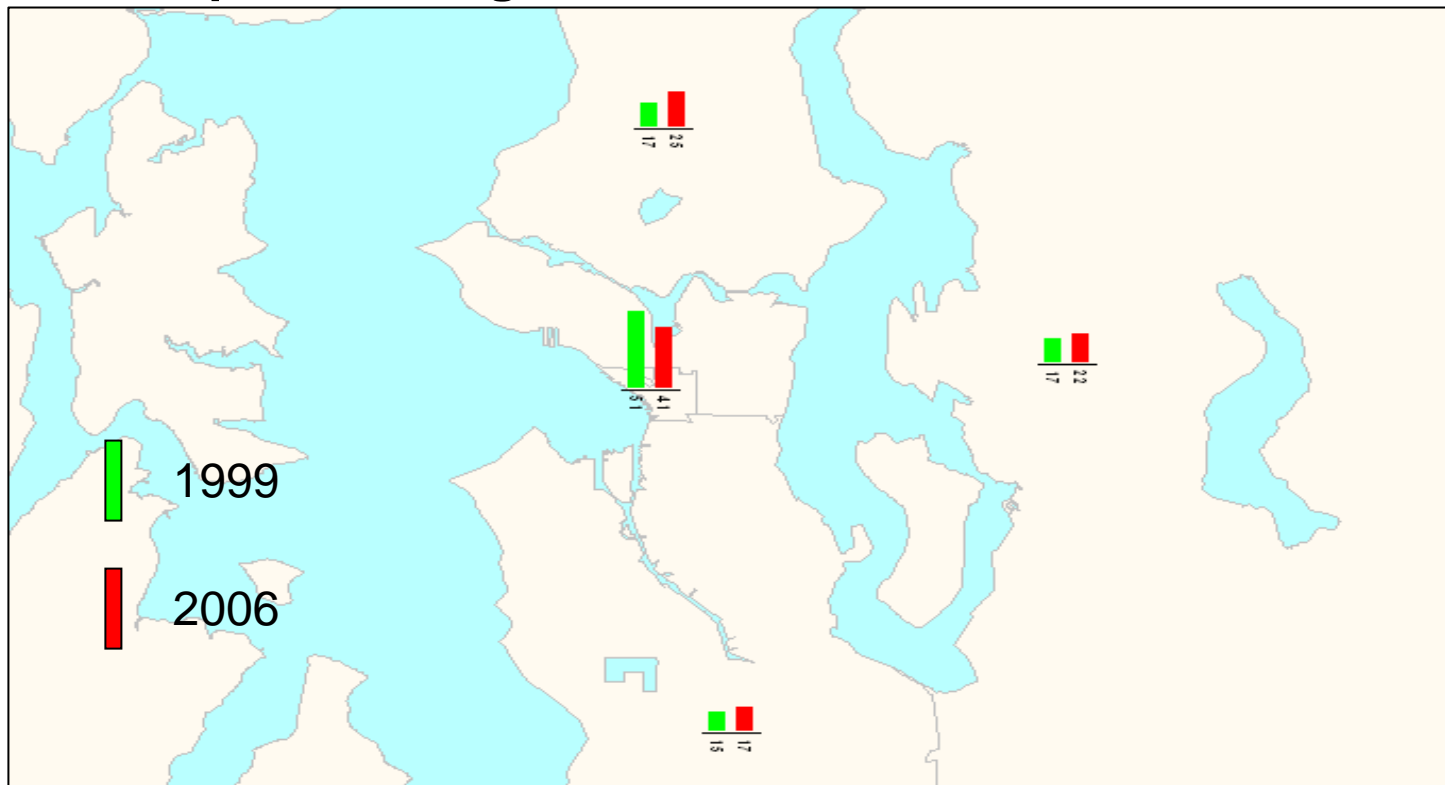


Comparison with 1999: A More Dispersed Travel Pattern

Seattle-Bainbridge (Westbound) Example

- Trips originated from Downtown Seattle decreased from 51% in 1999 to 41% in 2006
- Similar trends noted for Seattle - Bremerton

% of Trips Boarding at Colman Dock in PM Peak



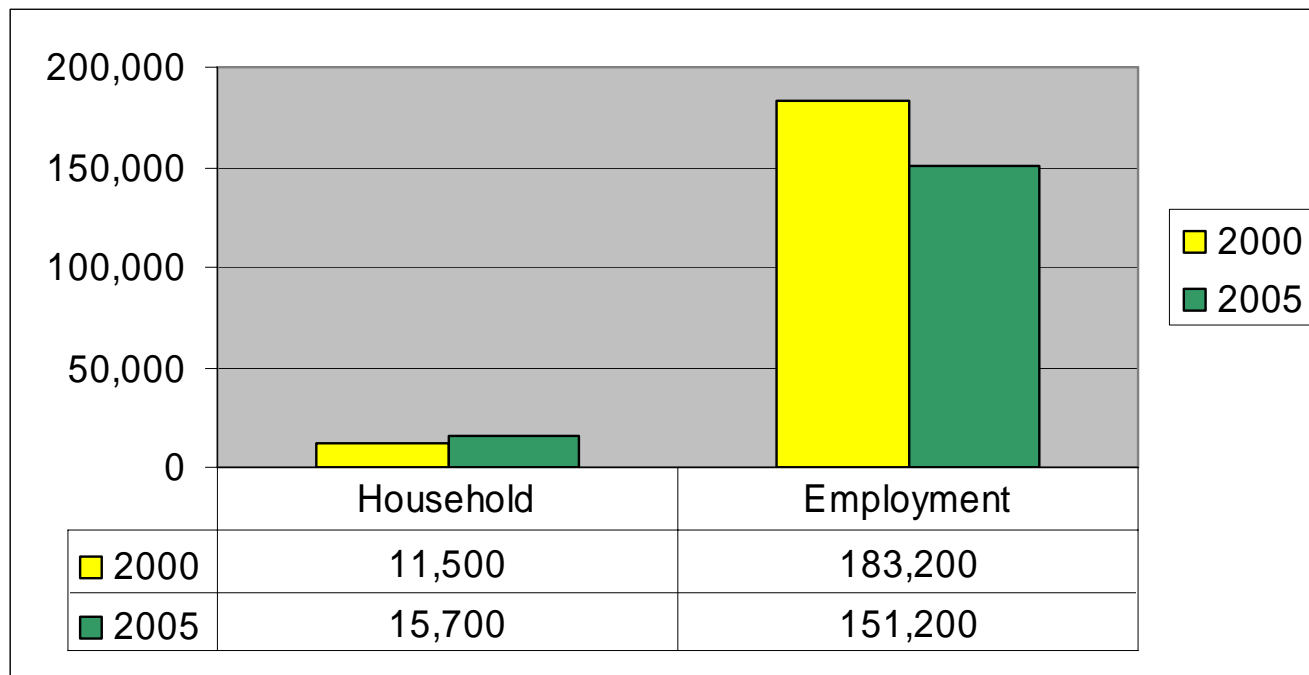
Ferry Ridership Changes

- Between 1999 and 2006 Systemwide:
 - Total ridership decreased by 10%
 - Vehicle ridership decreased by 5%
 - Walk-on ridership decreased by 21%

- Between 1999 and 2006 for Downtown Seattle Routes:
 - Total ridership decreased by 16%
 - Vehicle ridership decreased by 9%
 - Walk-on ridership decreased by 26%

Seattle Downtown Land Use Changes

- Total households increased by 6.4% between 2000 and 2005
- Total employment decreased by 3.8% between 2000 and 2005
- Downtown employment forecasted to increase again, however



Additional Trip Pattern Observations

- **San Juan Islands:** Traffic during the weekday is proportionately more oriented toward San Juan Island. On weekends, it's proportionately more oriented toward Orcas Island.
- **North Sound:** Origin and destinations on Port Townsend-Keystone are more clustered in Port Townsend than they were in 1999.
- **Central Sound:** The Central Kitsap area seems to be more oriented toward the Seattle-Bremerton route than Seattle-Bainbridge, a shift since 1999.
- **Telecommuting:** 20% of weekday riders said they telecommute at least one day a week.