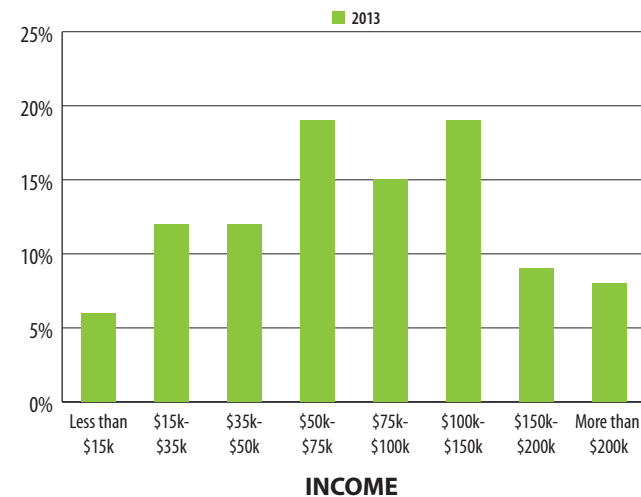




2013 Origin-Destination Travel Survey

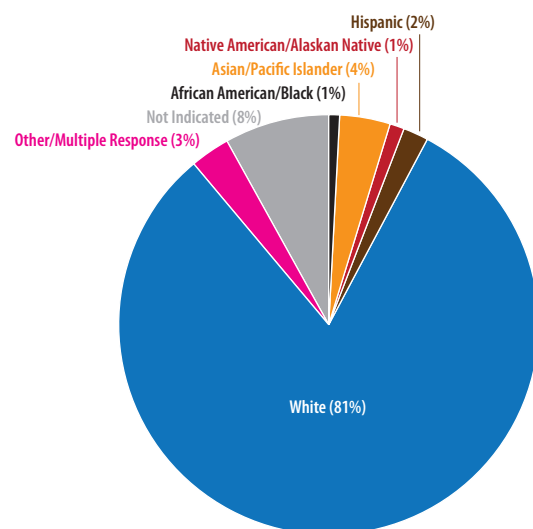
What is the household income of ferry riders?

Approximately half of ferry riders systemwide have a household annual income of more than \$100,000, while less than a quarter make under \$50,000.



What is the racial/ethnic makeup of ferry riders?

While the majority of ferry riders are white (81%), many other ethnic backgrounds are represented in the ferry rider population.



QUESTIONS OR COMMENTS?

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2013 Origin-Destination Travel Survey

SYSTEMWIDE FINDINGS

What is the Origin-Destination Travel Survey?

Washington State Ferries (WSF) conducts origin-destination (O&D) surveys every six to seven years as a way to accurately capture and measure the travel patterns of ferry passengers. The last survey was conducted in 2006. The surveys ask passengers about their typical routes, how they get to and from the ferry terminal, and the purpose of their trips. Survey results are being presented by service corridor.

How was the survey conducted?

- WSF conducted the surveys onboard ferry sailings on weekdays and Saturdays in October of 2013.
- The survey was a comprehensive survey, evaluating topics such as why people were traveling, what mode of transportation they used to board the ferry, and travel origins and destinations.
- Of the more than 70,000 passengers who rode the ferry during the surveyed periods, more than 16,000 usable surveys were completed—a sample of over 22 percent.

How does WSF use the survey results?

After WSF collects and analyzes passenger responses to the survey, the results are used by the agency and decision-makers in a number of ways:

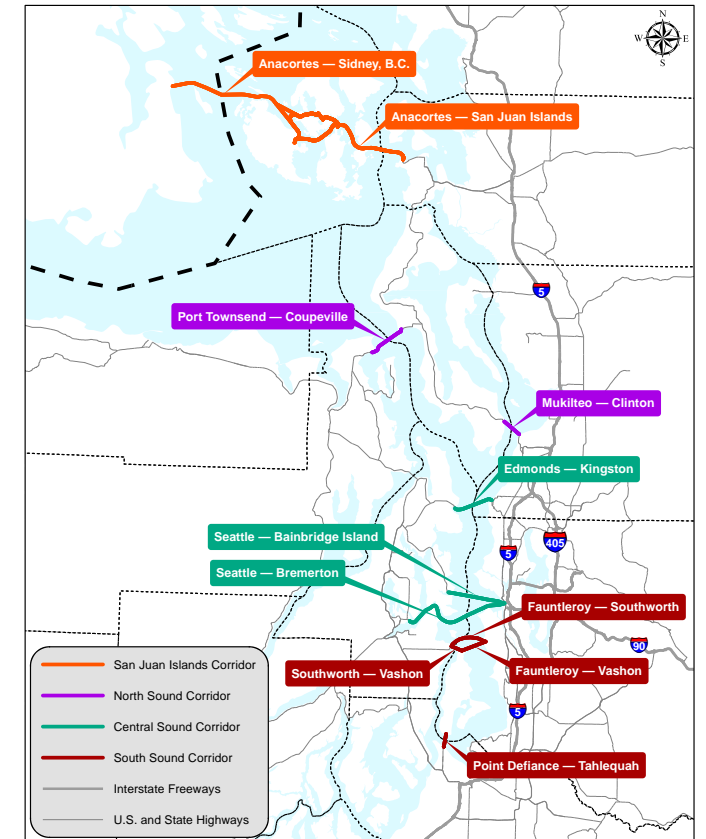
- Matching ferry service with customer needs
- Running an efficient ferry operation
- Informing WSF's long-range service planning and travel forecasting
- Providing input to capital improvement needs

How has ridership changed since 1999?

Despite a steady increase in overall population in the 12-county WSF service area (3.9 million in 1999, 4.3 million in 2006, and 4.6 million in 2013), systemwide ridership has decreased consistently since 1999 (72,200 per day in 1999, 65,300 per day in 2006, and 61,700 in 2013).



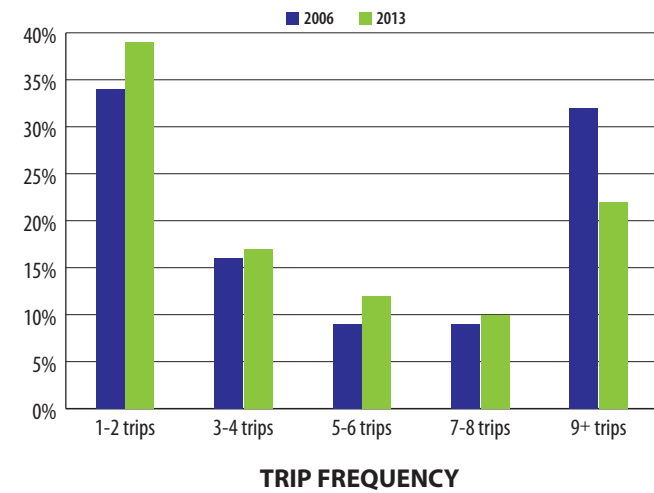
Study Corridors



Survey responses will help WSF understand emerging commute trends, such as telecommuting.

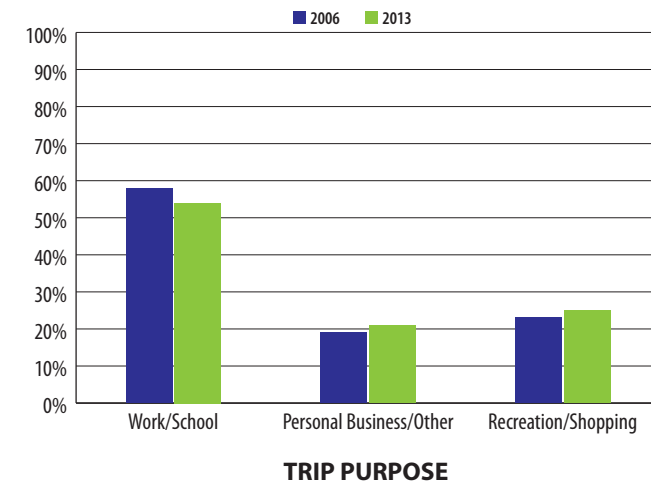
How frequently do riders travel?

Ferry riders made less frequent trips overall compared to 2006. A smaller percentage of weekday travelers made 9 or more trips per week in 2013, while a higher percentage only made 1-2 trips per week.



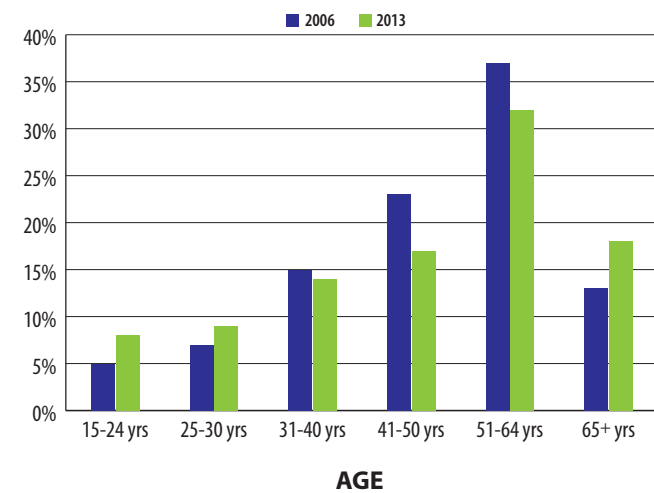
Why are ferry riders traveling?

Weekday trips are still predominantly related to work and school, although the percentage of those trips has decreased since 2006 (58% in 2006 and 54% in 2013), while trips associated with personal business and recreation/shopping have increased.



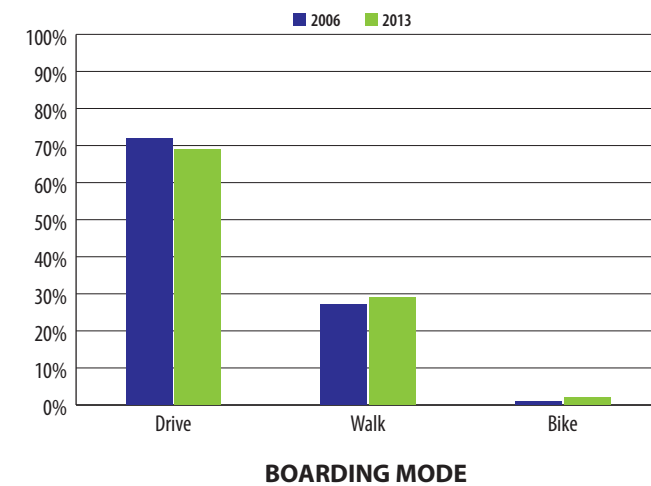
How old are ferry riders?

Ferry riders are aging overall; the average age has increased from 42 in 1993, to 48 in 2006, to 49 in 2013. Roughly 18% of riders are retired and another 14% indicated they are planning on retiring in the next five years. Furthermore, for the entire 12-county population, the percentage of those aged 65 or older grew from 11 percent in 2006 to 29 percent in 2013.

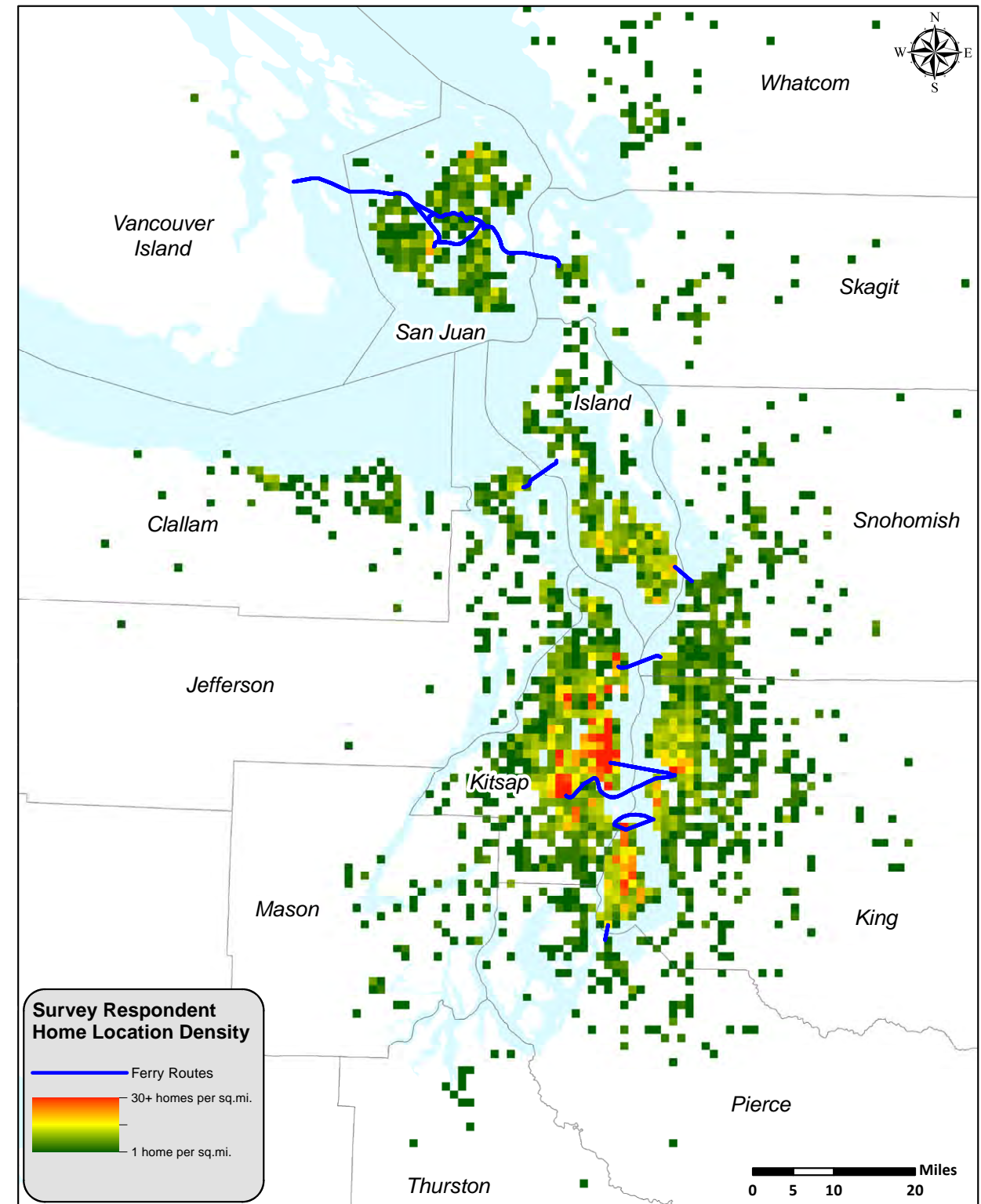


How do riders board the ferry?

69% of weekday riders boarded the ferry by automobile in 2013, a decrease from 72% in 2006, while walk boardings increased from 27% to 29% and bike boardings increased from 1% to 2%.



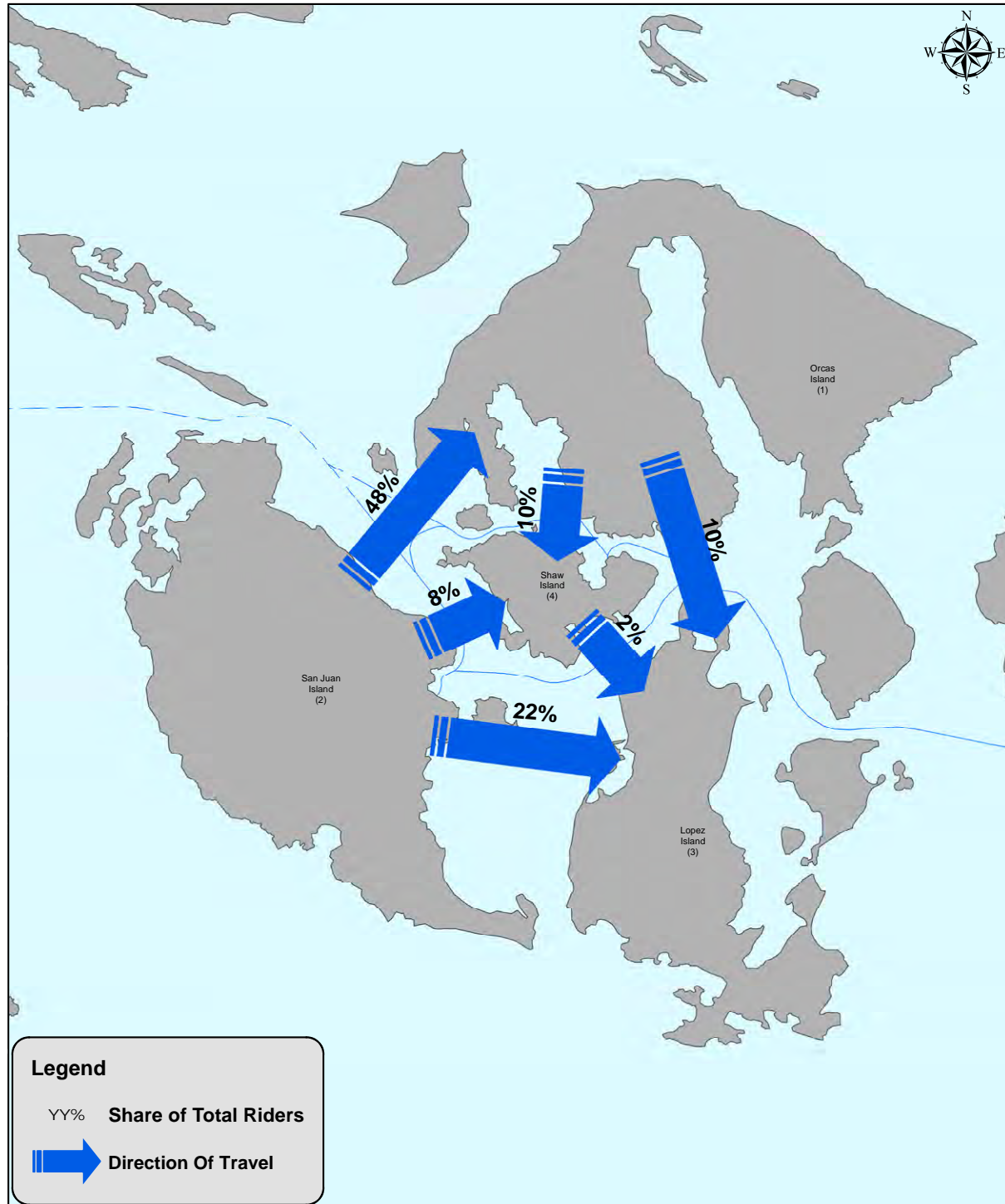
Weekday Ferry Rider Home Locations





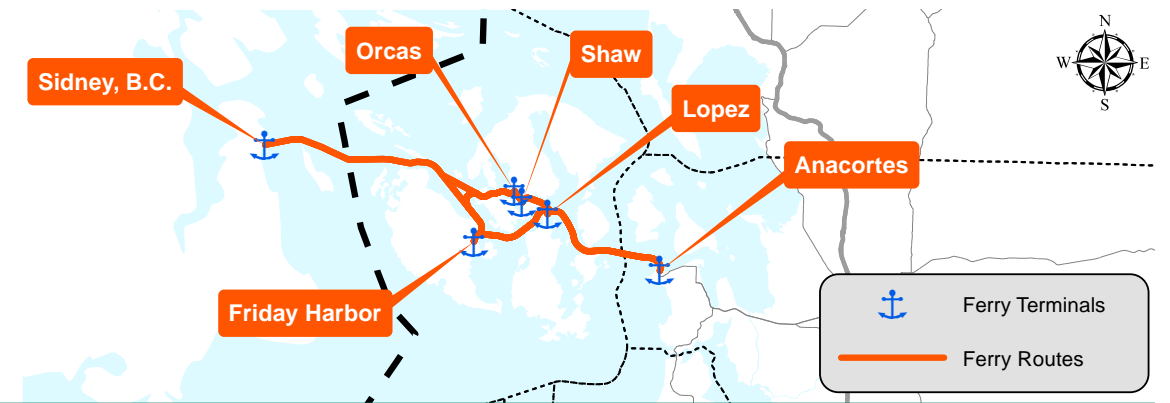
2013 Origin-Destination Travel Survey

San Juan Inter-island Weekday Eastbound Origins & Destinations



2013 Origin-Destination Travel Survey

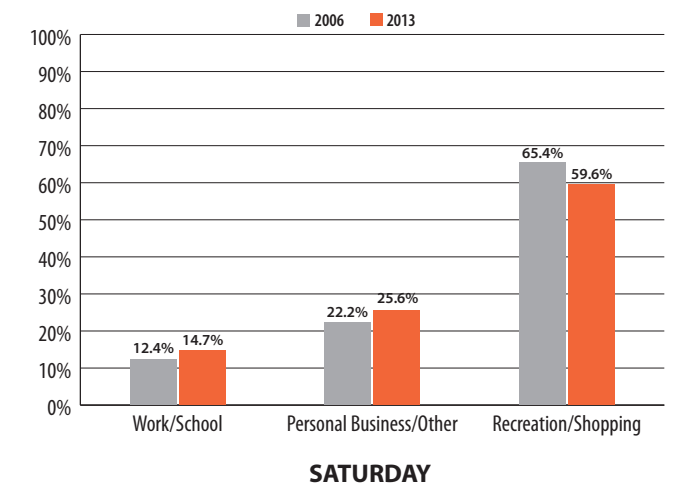
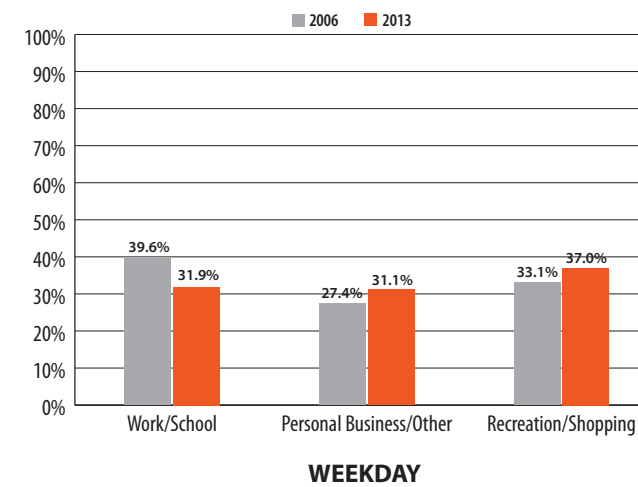
San Juan Islands Corridor



KEY FINDINGS

- Weekday trip frequency is much lower for the San Juan Islands Corridor compared to the other corridors in the WSF system (two per week vs. three to five for the other corridors), as is the percentage of work/school trips.
- The largest share of weekday trips has shifted from work/school trips (40% in 2006) to recreational/shopping trips (37% in 2013).
- A greater percentage of survey respondents are over the age of 64 compared with 2006 survey results, and almost a quarter of the respondents indicated that they are retired.
- The percentage of weekday ferry travelers making a round trip on the same day versus some other day grew from 48% in 2006 to 56% in 2013 for the corridor; this parallels an increase by 6% in non-motorized boardings that parked a vehicle at the terminal on weekdays.
- Same day round trips for Saturday trips decreased from 61% in 2006 to 48% in 2013.

Trip Purpose

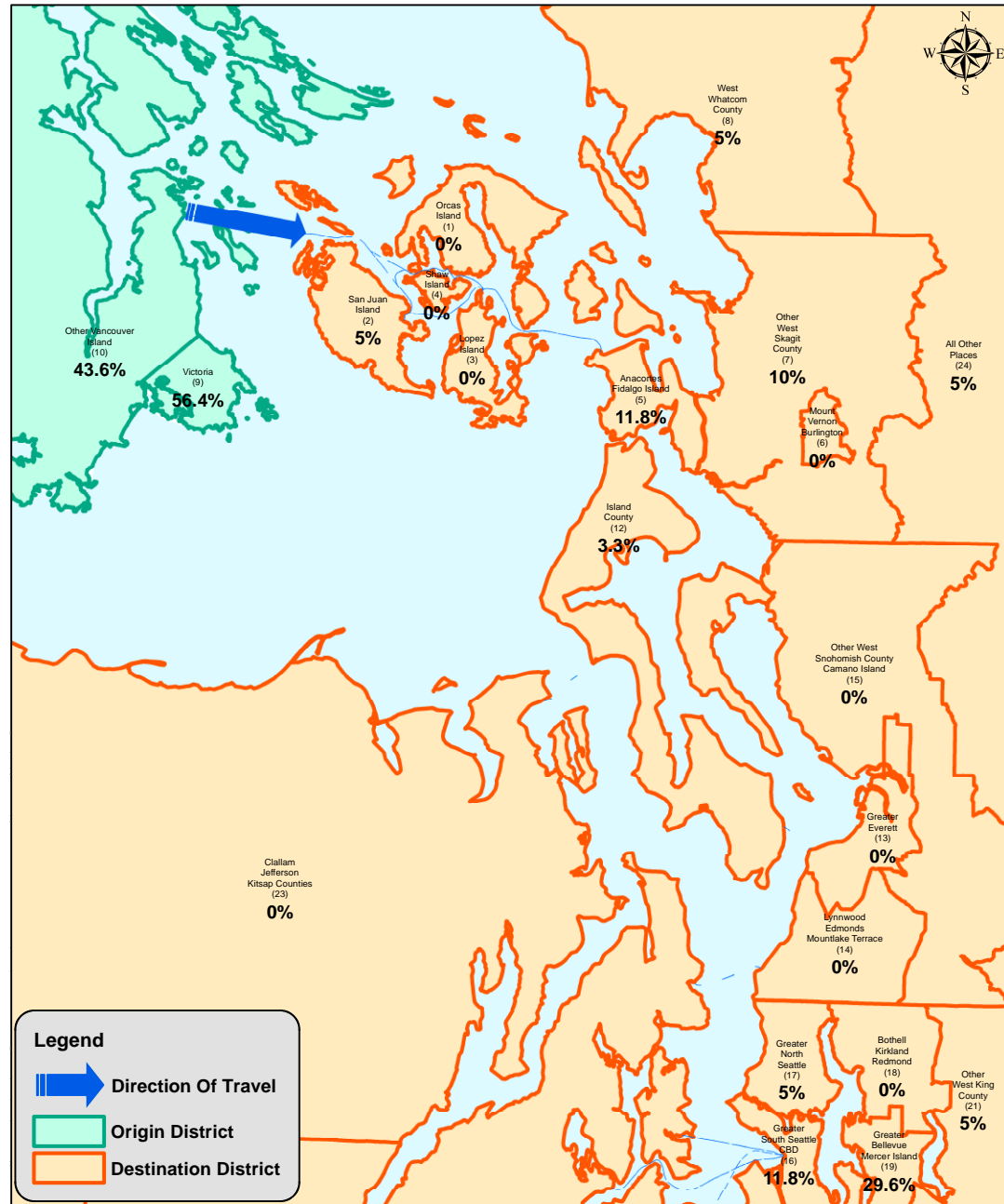




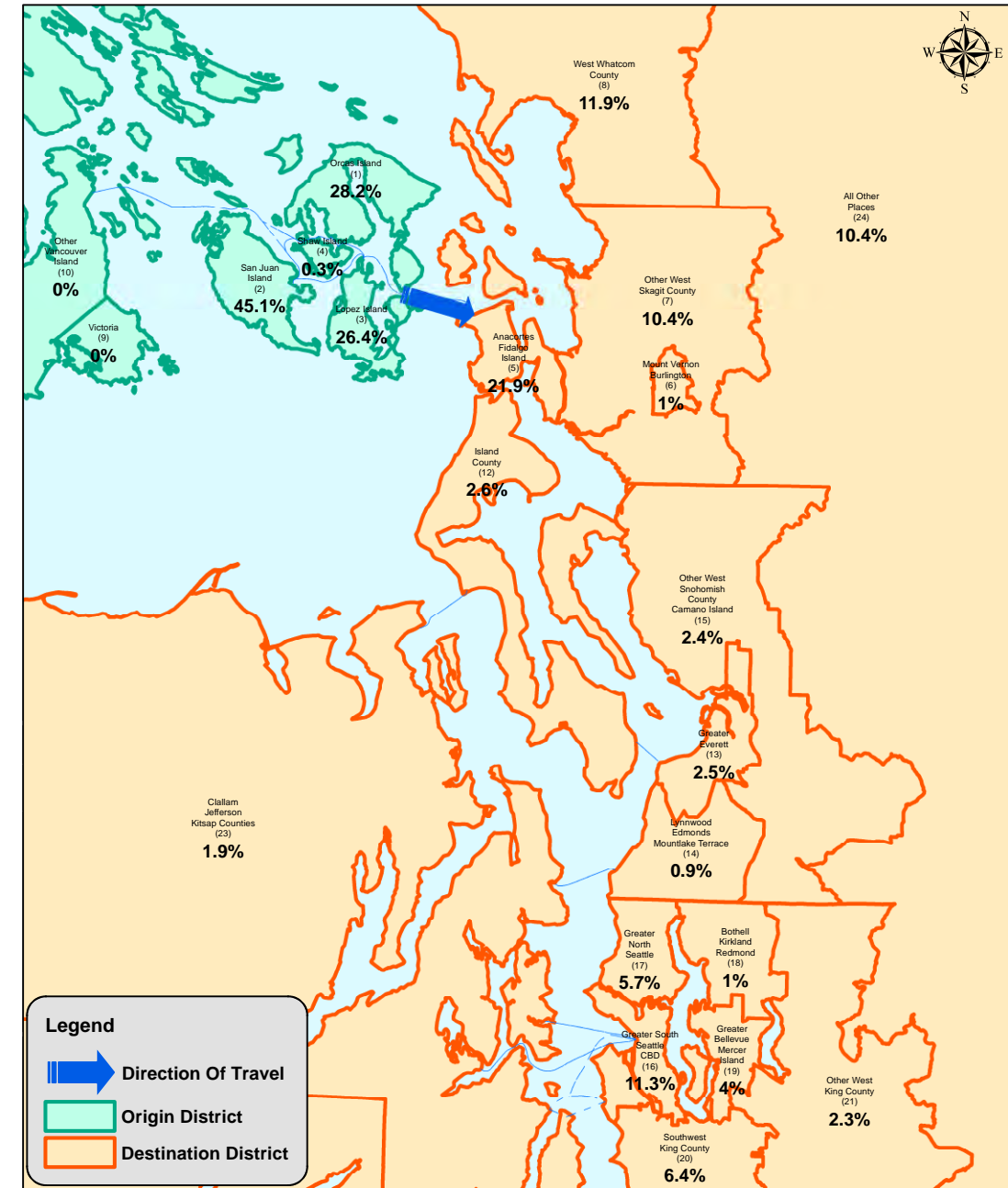
2013 Origin-Destination Travel Survey – San Juan Islands Corridor



Anacortes–Sidney Weekday Eastbound Origins & Destinations



Anacortes–San Juan Islands Weekday Eastbound Origins & Destinations



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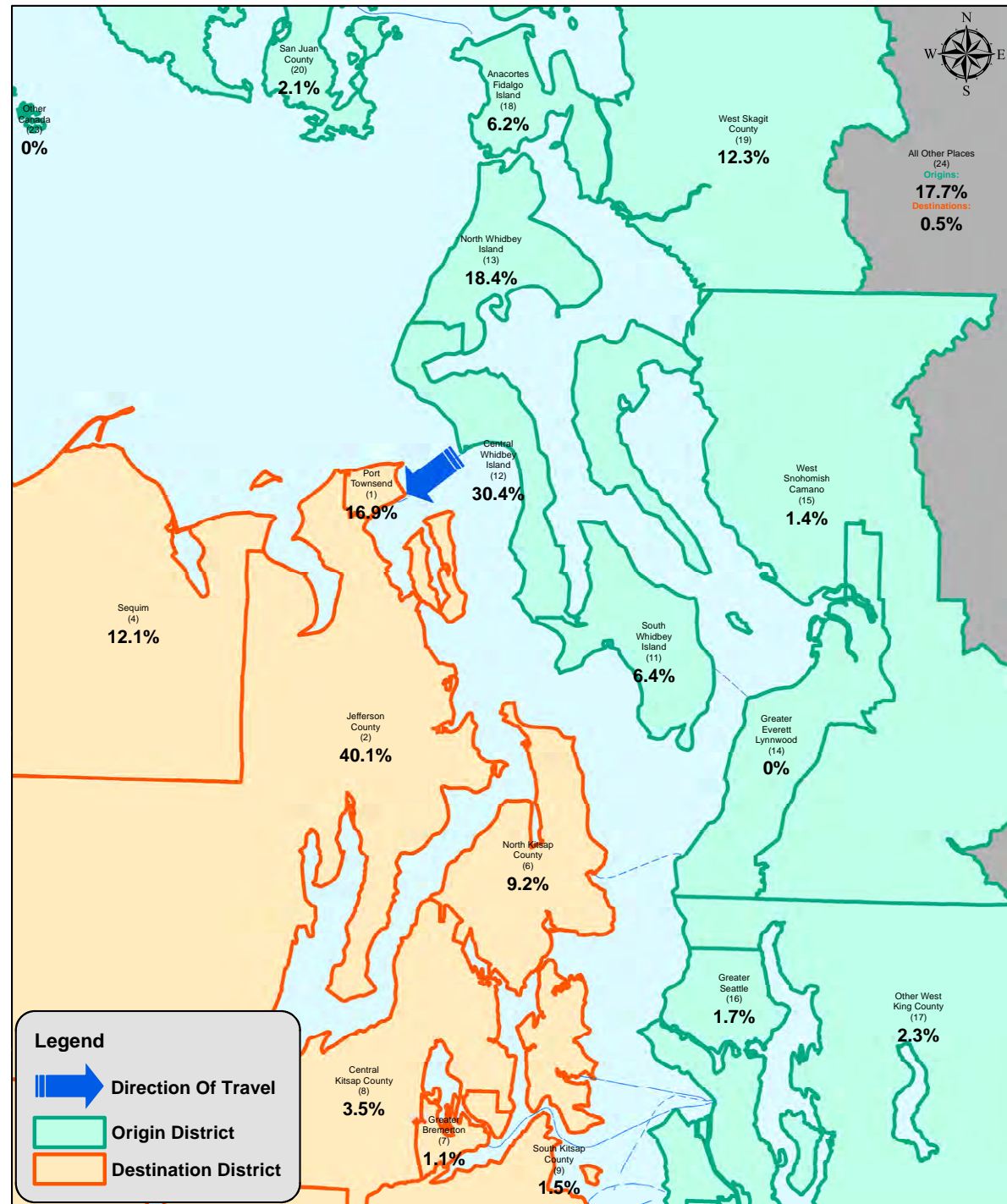
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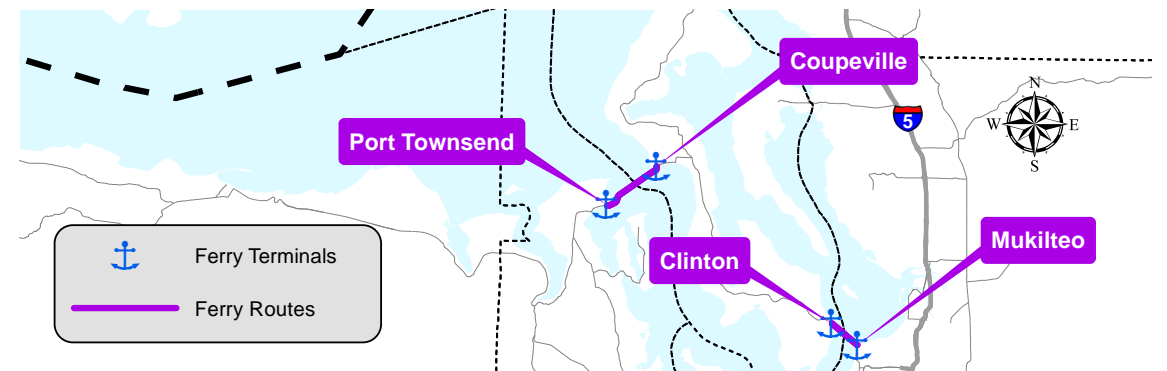
2013 Origin-Destination Travel Survey

Port Townsend – Coupeville Saturday Westbound Origins & Destinations



2013 Origin-Destination Travel Survey

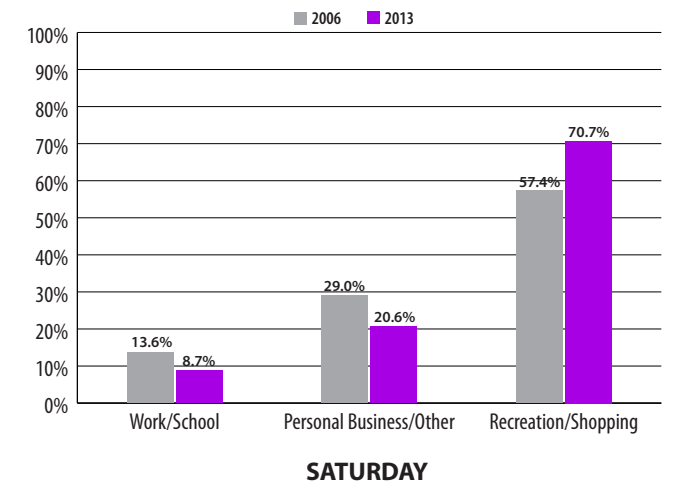
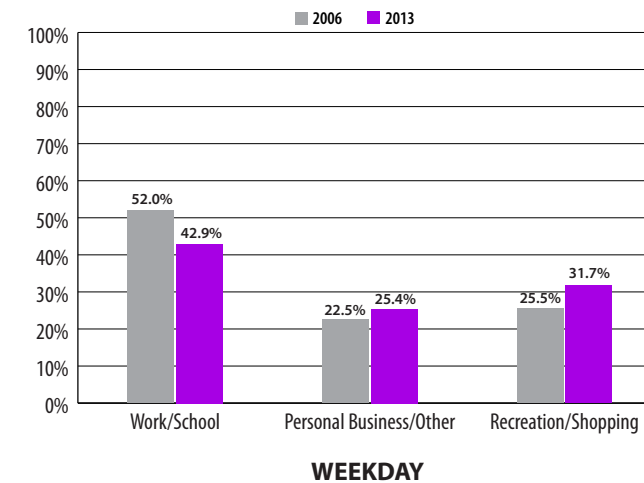
North Sound Corridor



KEY FINDINGS

- When compared to the other corridors, the North Sound Corridor has the oldest riders (52 years old on average), and the highest percentage of retirees at 24%.
- The share of weekday work/school trips has decreased from 52% in 2006 to 43% in 2013, while the share of recreation/shopping trips has increased from 26% to 32%.
- Recreational/shopping trips on Saturday increased from 57% in 2006 to 71% in 2013, which corresponds with the share of weekend round trips doubling from 2006 in the North Sound Corridor.
- More than half of walk-on boardings during the PM peak period access and egress the ferry terminal by transit, while the vast majority of walk-on boardings during non-PM peak periods and weekends access and egress by vehicle.
- Saturday North Sound Corridor routes exhibited an almost 20-point increase in the share of responses that indicated they parked a vehicle prior to walking aboard the ferry.

Trip Purpose

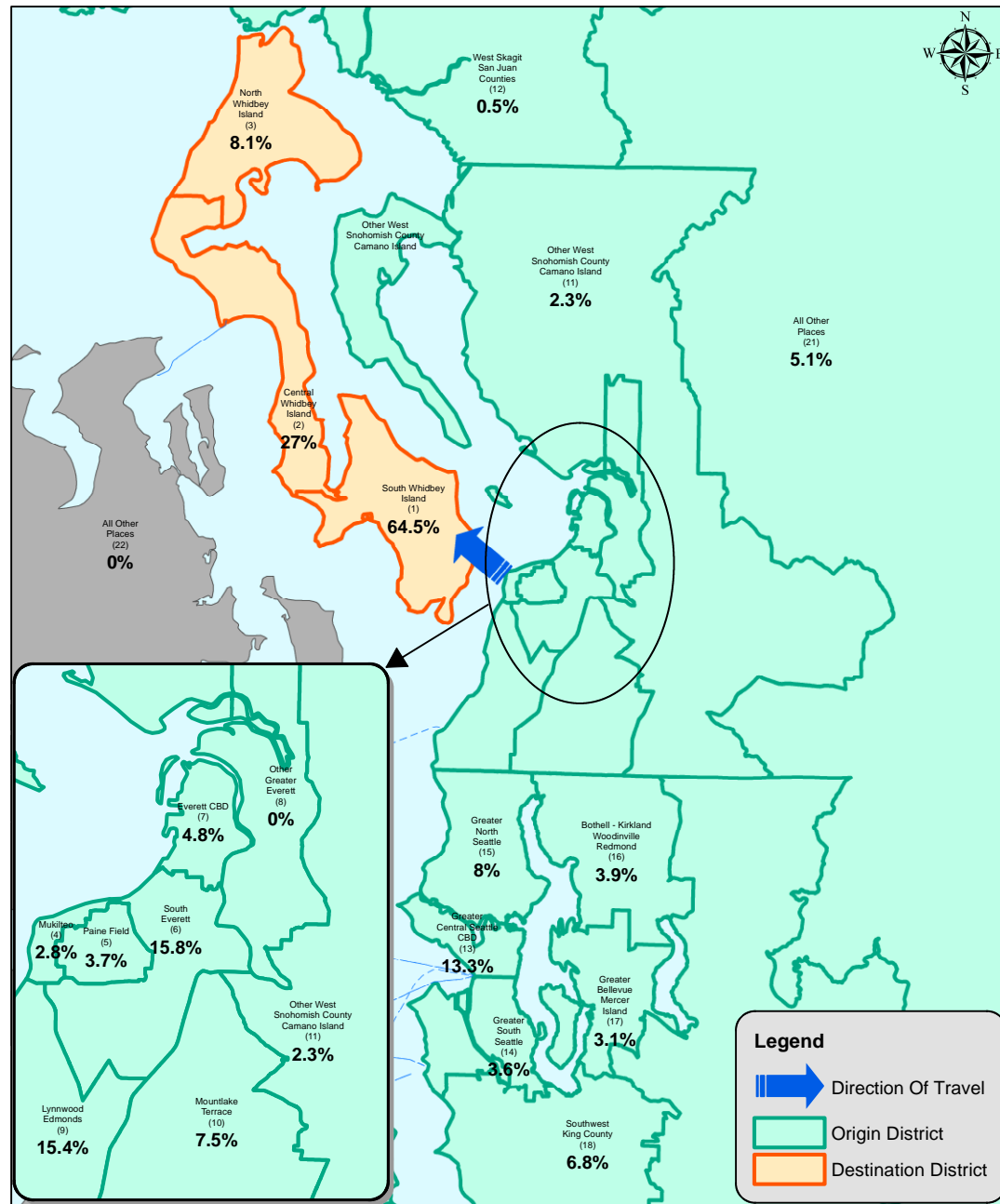




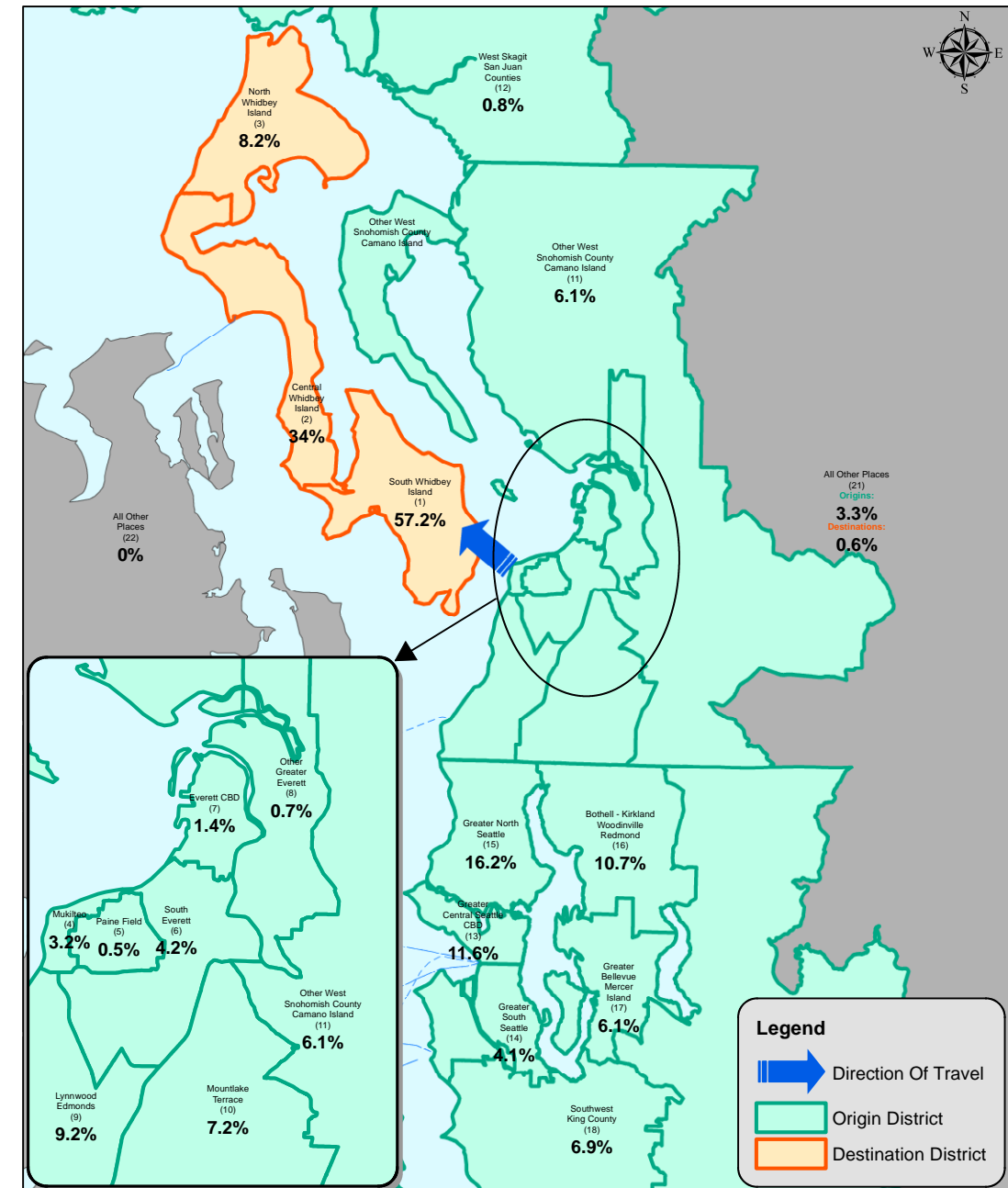
2013 Origin-Destination Travel Survey – North Sound Corridor



Mukilteo–Clinton Weekday Westbound Origins & Destinations



Mukilteo–Clinton Saturday Westbound Origins & Destinations



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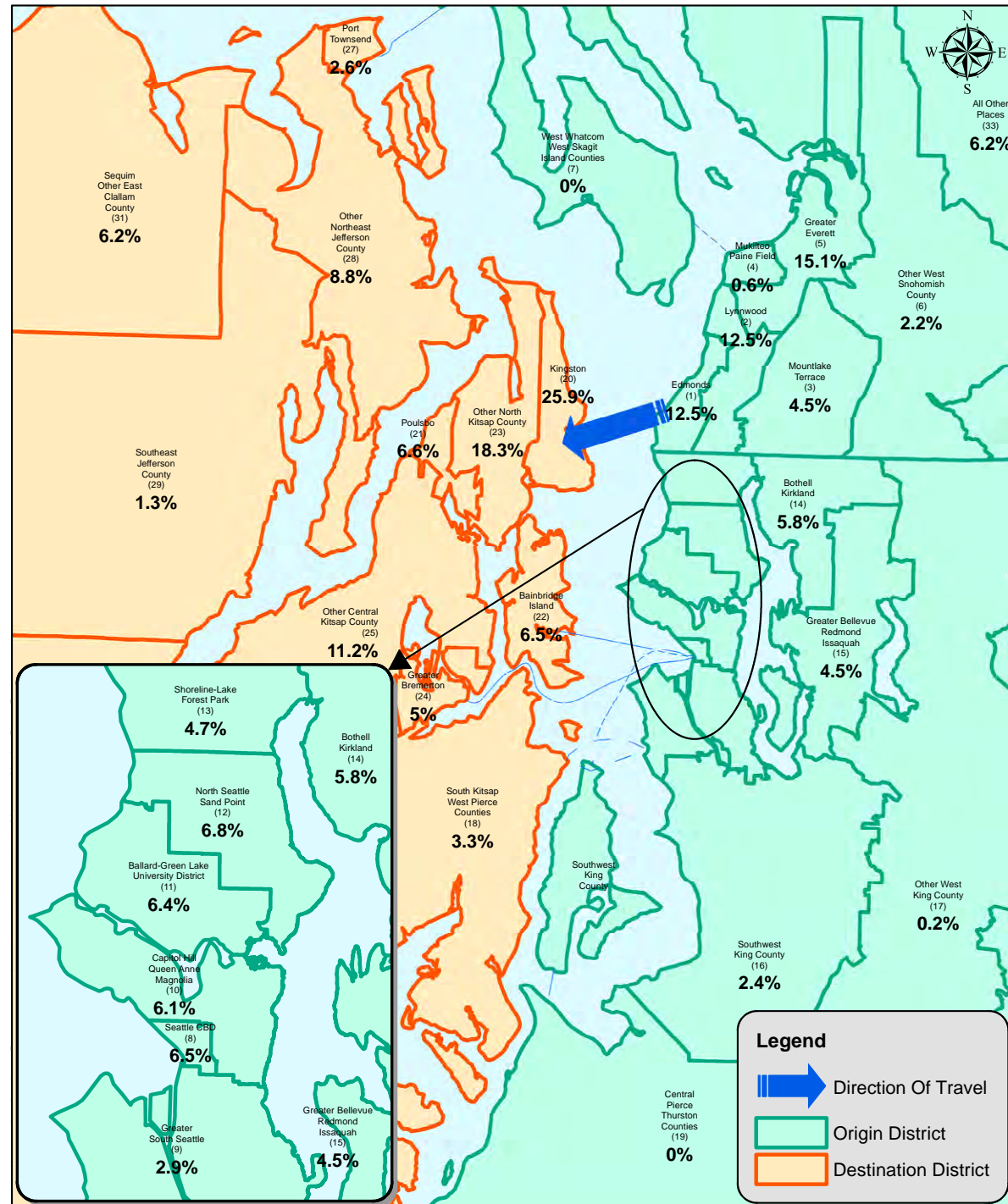
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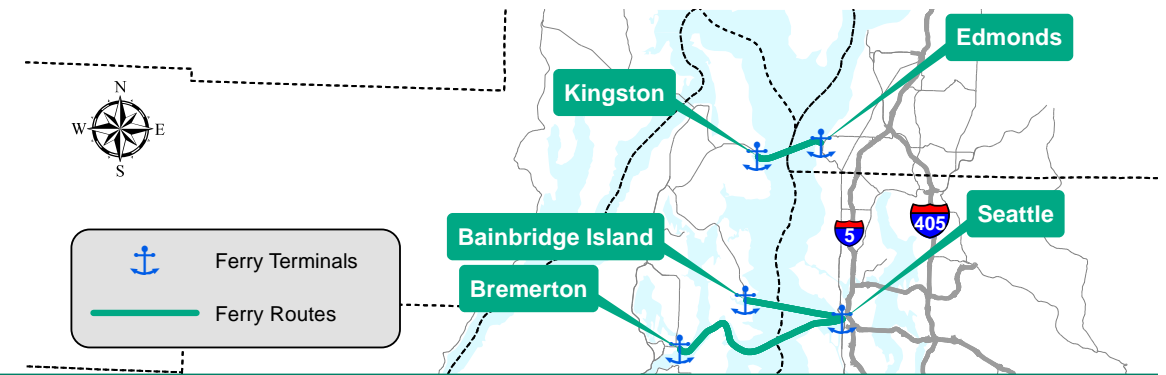
2013 Origin-Destination Travel Survey

Edmonds-Kingston Weekday Westbound Origins & Destinations



2013 Origin-Destination Travel Survey

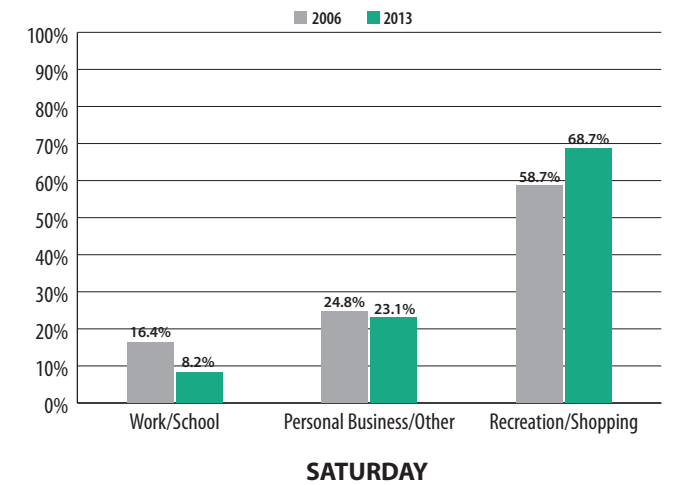
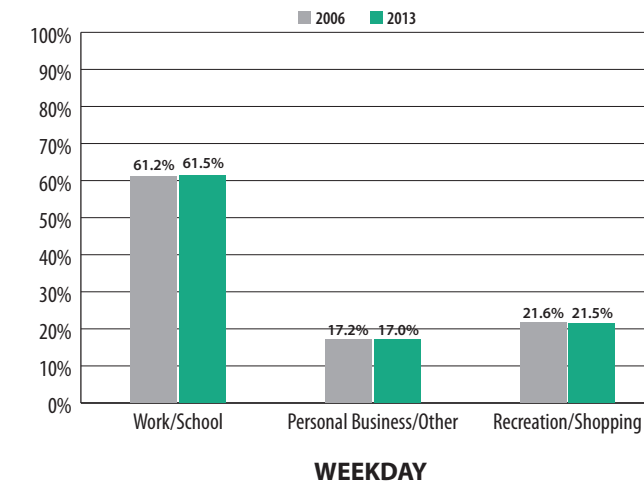
Central Sound Corridor



KEY FINDINGS

- Central Sound continues to be the highest traveled corridor in the WSF system, with 12.4 million riders per year, down from 13.2 million passengers in 2006 and a peak of 14.4 million passengers in 1999.
- Over 60% of weekday trips in the corridor are associated with work/school, while more than 68% of Saturday trips are recreation/shopping.
- The share of riders over the age of 64 increased in the Central Sound Corridor from 9% in 2006 to 16% 2013. The Seattle-Bainbridge route exhibited the most significant shift in rider age in the corridor, changing from about 8% to 17% over 64 years of age.
- The Central Sound Corridor exhibits a shift in trip frequency from high frequency use patterns towards more moderate trip frequency.
- A decrease in the share of vehicle boardings ranged from nine percentage points on the Seattle-Bremerton route, to seven points on the Seattle-Bainbridge route, to three points on Edmonds-Kingston.
- There was some increase in the number of trips to and around the terminals on all of the routes in this corridor and a corresponding decrease in trips farther away from the terminals on each side of the crossing.

Trip Purpose

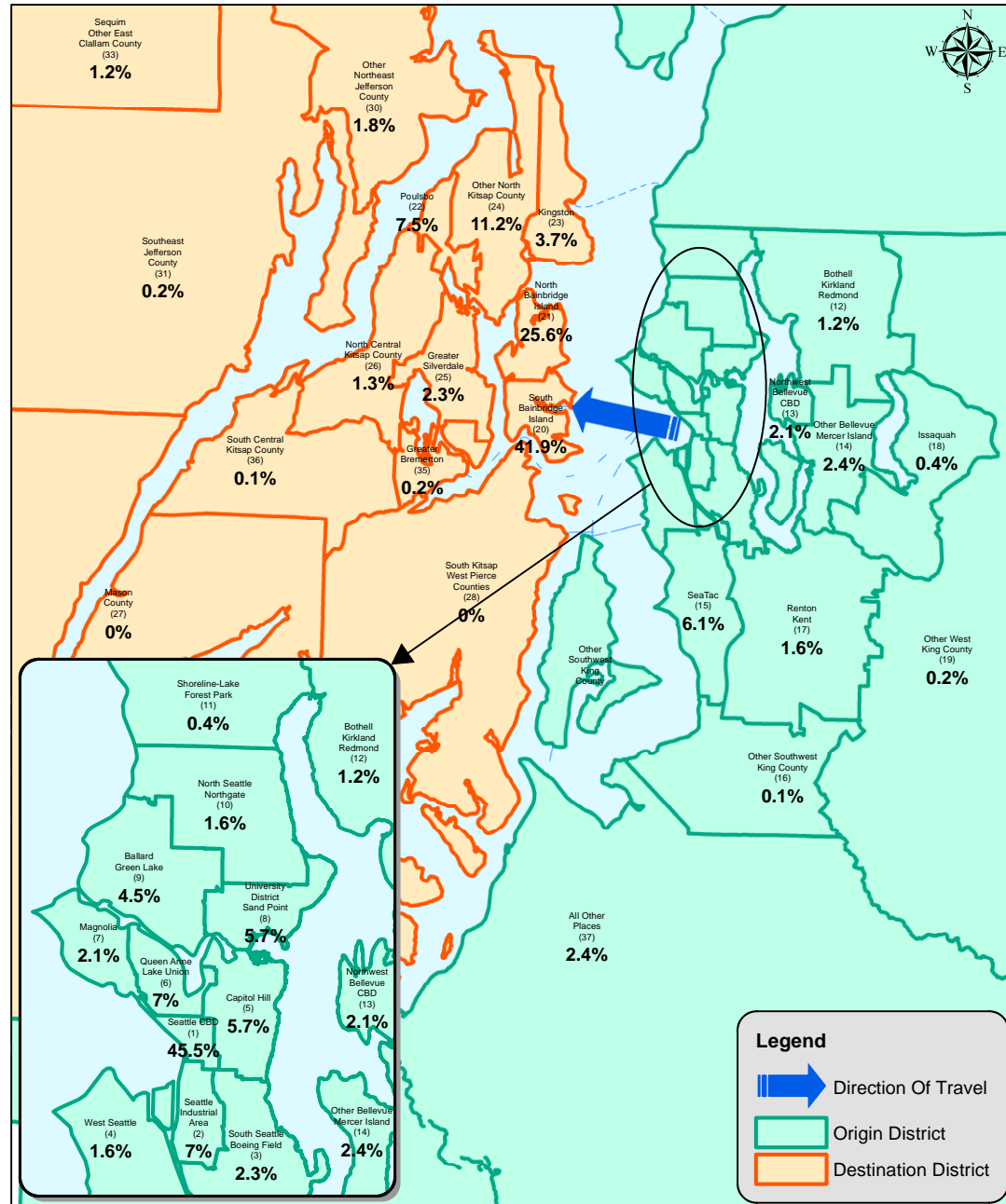




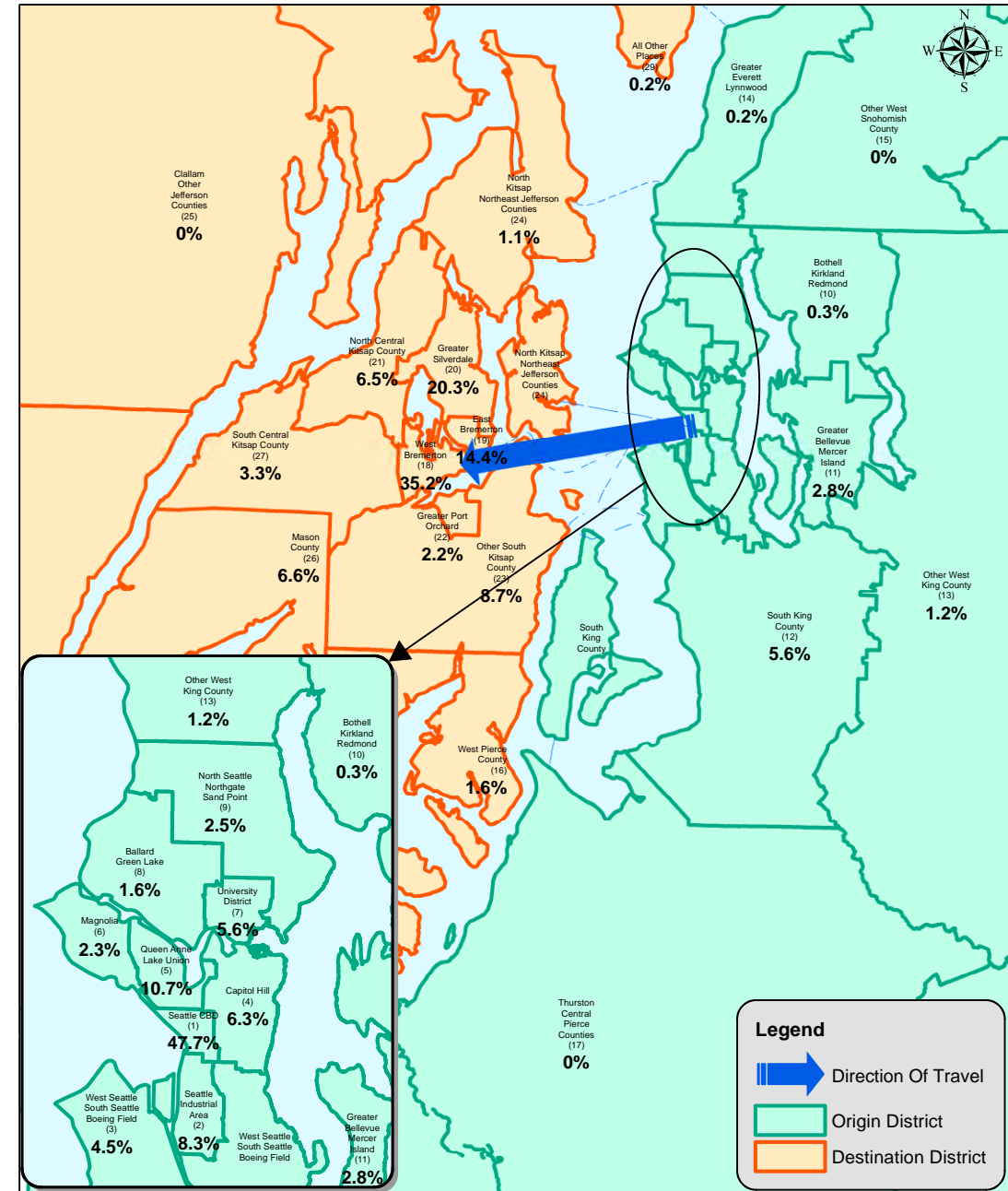
2013 Origin-Destination Travel Survey – Central Sound Corridor



Seattle–Bainbridge Weekday Westbound Origins & Destinations



Seattle–Bremerton Weekday Westbound Origins & Destinations



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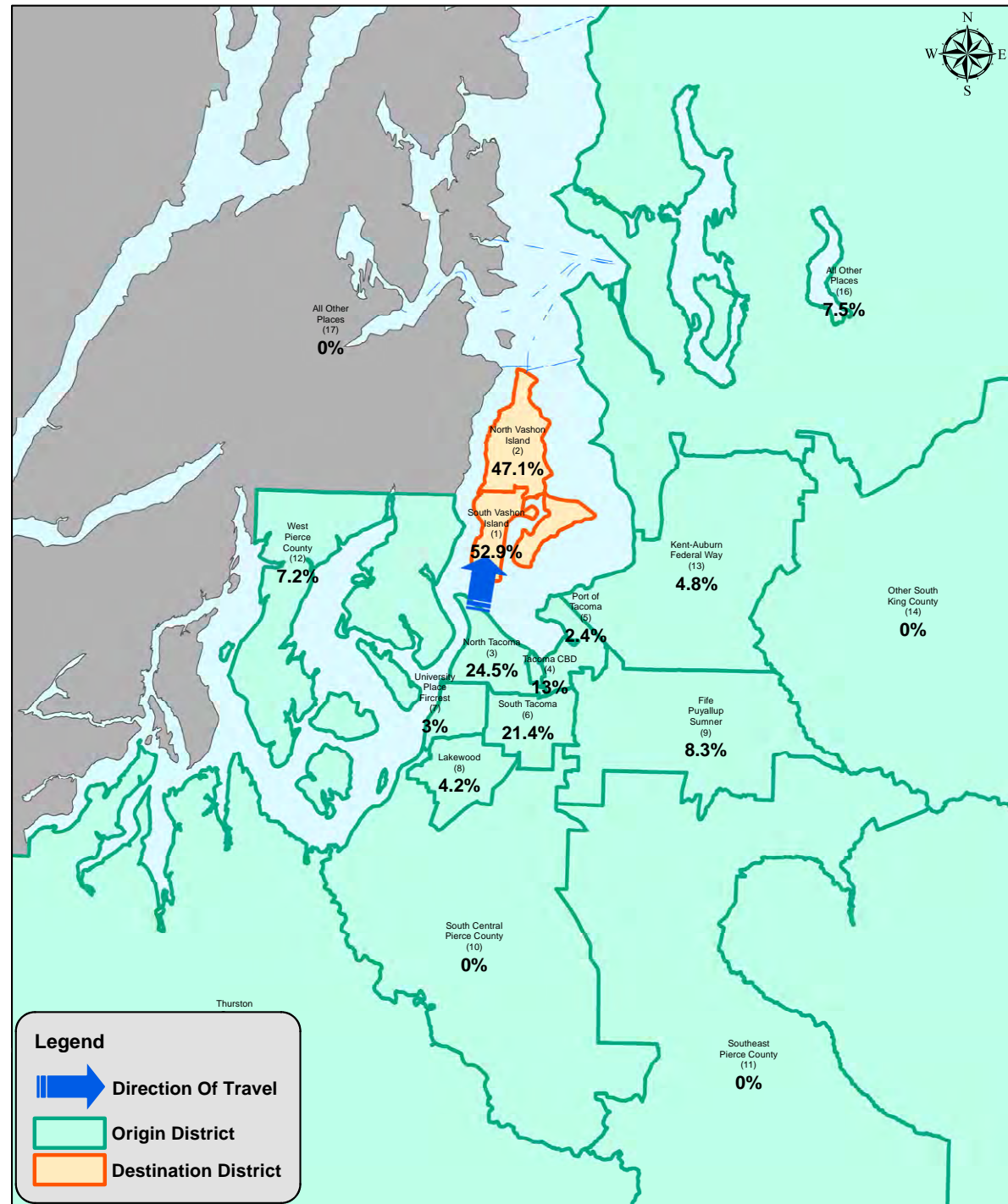
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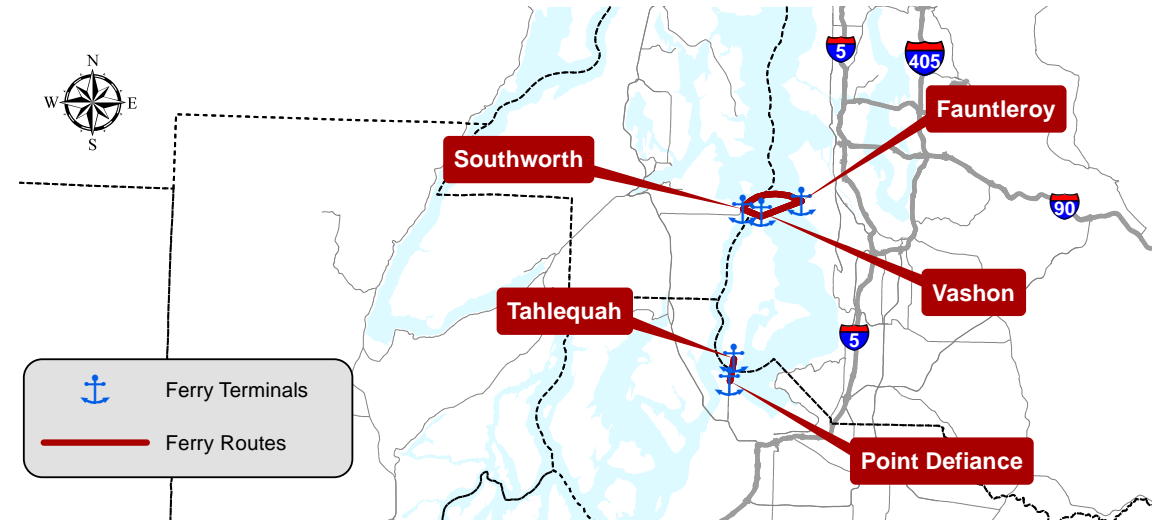
2013 Origin-Destination Travel Survey

Point Defiance–Tahlequah Weekday Northbound Origins & Destinations



2013 Origin-Destination Travel Survey

South Sound Corridor



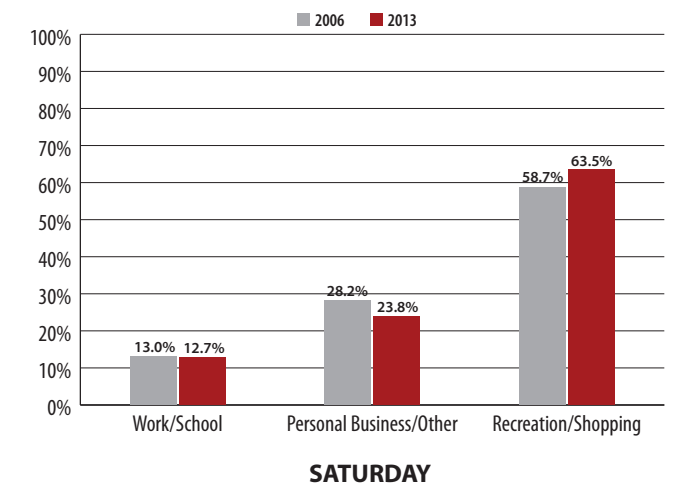
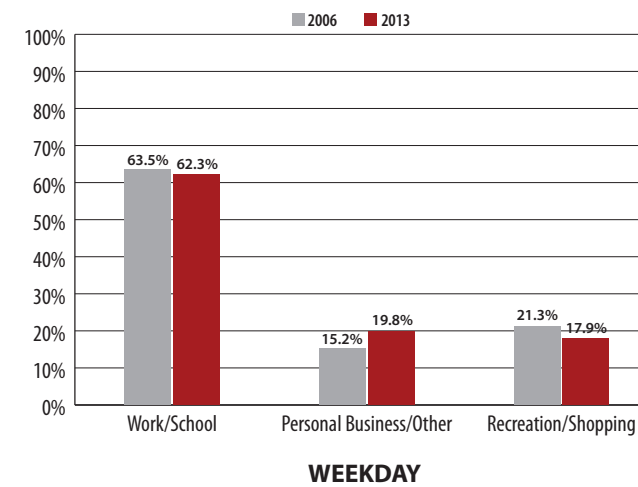
KEY FINDINGS

- The South Sound Corridor, like others in the system, is experiencing an aging population, a corresponding reduction in the frequency of commuter trips, and a slow shift towards recreational and shopping trips.
- Although driving is still the predominant method of using the ferry system (over 80% of weekday trips),

the percent of non-motorized trips that parked at the terminal increased significantly between 2006 (26%) and 2013 (40%).

- The number of trips to areas around the terminals on all of the routes in this corridor increased and trips farther away from the terminals on each side decreased.

Trip Purpose

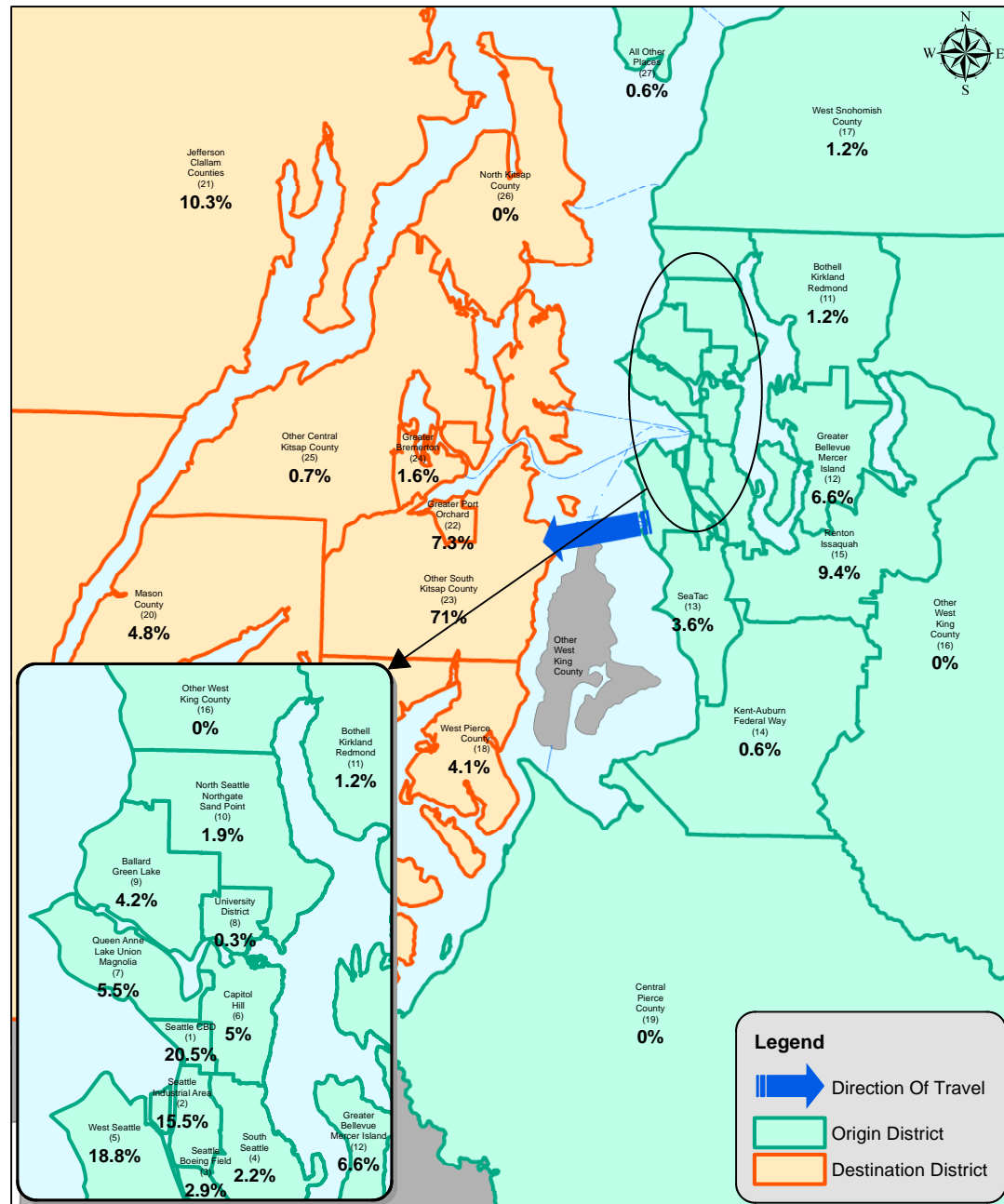




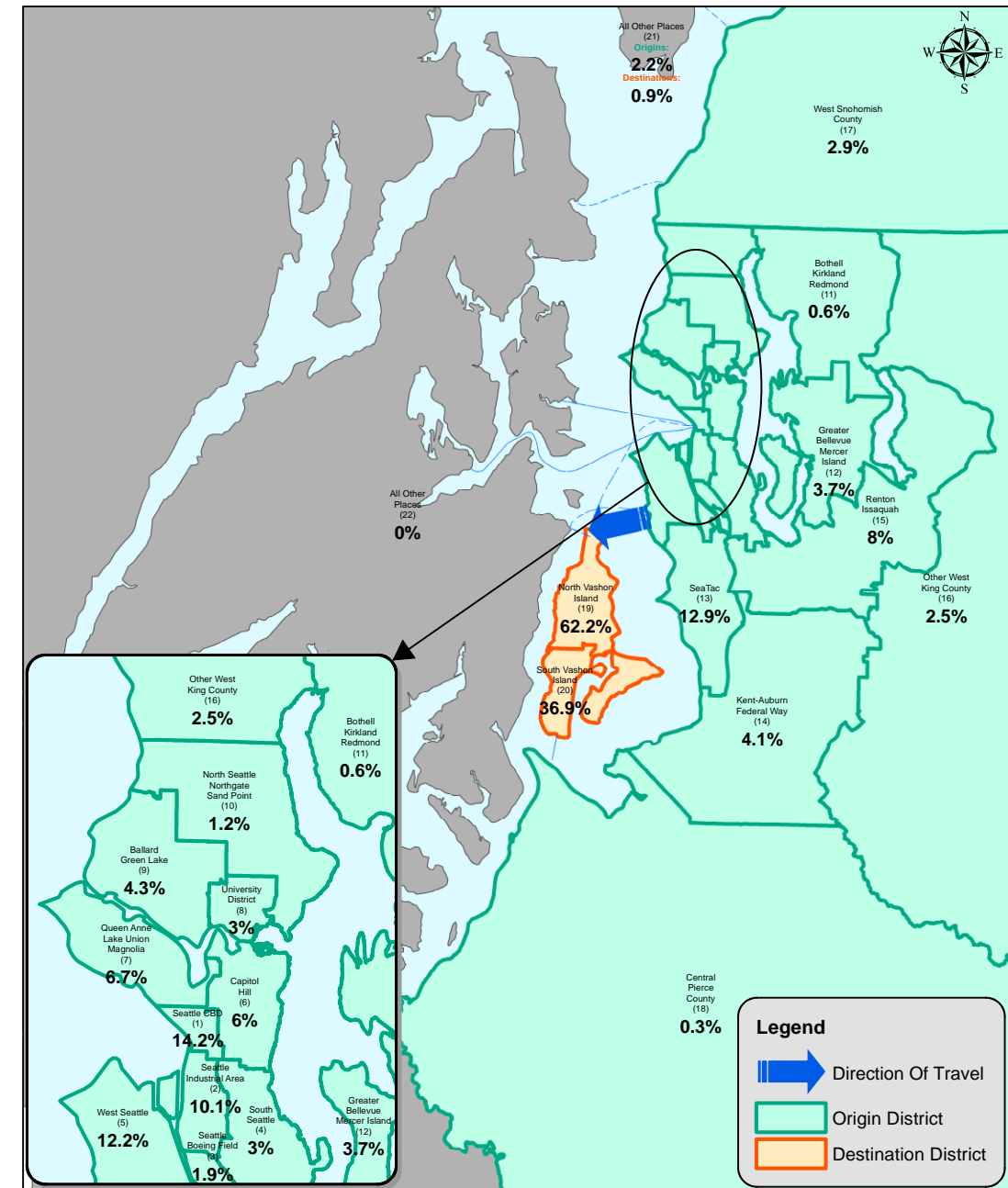
2013 Origin-Destination Travel Survey – South Sound Corridor



Fauntleroy–Southworth Weekday Westbound Origins & Destinations



Fauntleroy–Vashon Weekday Westbound Origins & Destinations



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