3.0 Systemwide Market Trends

3.1 MARKET TRENDS

The WSF system carries 23.8 million riders per year, or about 65,300 riders per day. This is up three percent from the ridership in 1993 (63,300 riders per day) but down from a peak in 1999 of 72,200 riders per day (a 10 percent drop). Average fares in 2006 systemwide were $10.49 for vehicles and $5.76 for passengers. Fares have increased since 1999 beyond inflation (in 2006 constant dollars), from an average fare of $7.55 for vehicles and $4.02 for passengers. This represents a 39 percent increase for vehicle fares and a 43 percent increase in passenger fares since 1999. Because of the way fares are collected, the vehicle fares represent one-way fares (i.e., vehicles have to pay this fare in both directions of travel) and the passenger fares are round trip fares (i.e., passengers only have to pay fares in one direction of travel). The average systemwide perceived wait time for ferry riders is 24 minutes.

Ferry riders are wealthier than the average Puget Sound resident ($96,000 per year self-reported household income in 2006) and older than average (48 years old) when compared to regional averages ($53,000 per year self-reported household income in 2006 and 35 years of age). Consistent with the average household incomes, the number of vehicles per household also is higher than the regional average (2.4 vehicles per household compared to the regional average of 1.8 vehicles per household).

Weekday travel is dominated by work trips (more than 58 percent). Even though work trips are the most common trip purpose, they are declining as a percent of total trips since 1993 (from 68 percent in 1993 and 60 percent in 1999). This is likely because more people are telecommuting (20 percent of weekday travelers said they telecommute at least one day per week), there are more job opportunities on the west side of Puget Sound, higher fares may discourage more frequent travel, and more people can work at home full-time.

Weekday travelers are most likely to travel four or five days per week (more than 51 percent use ferries five days per week) but weekend travelers are most likely to travel only one day per week (67 percent), indicating that the weekend market is made up of different people than the weekday market and for different purposes (i.e., non-work).

The vast majority of travelers return the same day and using the same ferry route, as expected. But the number of return trips on a different day has increased significantly in recent years (from 13 percent in 1999 to 25 percent in 2006) for weekdays. This is likely because with higher fares, ferry riders are more likely to take fewer trips but stay longer. The 2006 survey also included a question on whether travelers were on their preferred sailing and 28 percent of weekday travelers said that they would prefer a different sailing. The underlying reasons for this is not well understood, so additional research on this topic is warranted.

There is an increasing trend in ferry riders boarding in a vehicle and a decreasing trend in ferry riders who walk onboard between 1993, 1999, and 2006. This may be a result of a combination of factors, including an increase in non-work trips that are less likely to be walk-ons, that destinations are more likely to be beyond transit accessible locations, higher incomes that make some ferry riders less sensitive to cost increases, and/or more travelers needing their vehicle for work purposes. It also may be a result of increasing costs for parking at the terminals. Even with this parking cost, a significant number of people keep a vehicle at their destination, so that they can drive to their destination, but still walk on the ferry (27 percent for weekday travelers and 21 percent for weekend travelers).

In addition to the summary above, there were many other questions asked on the origin-destination survey that describe ferry rider characteristics. These are summarized in Table 3.1. Details on most of these questions are provided for the system, and by route and corridor in the remainder of the report.

Table 3.1 Origin-Destination Survey Systemwide Summary

Characteristic	Summary	New Item
Sailing Preference: Time/Route	22% want a different time 3% want a different route	Yes
Wait Time (Perceived)	27 minutes average weekday 22 minutes average weekend	
Wait Location	In passenger terminal – 20.1% In vehicle holding area – 68.3% On street – 4.5%, No wait time – 3.7%, Other – 3.3%	Yes
One-Way Trips per Week Statistics	Weekday average over 5 days per week Weekend average under 3 days per week	Yes
When will you return? Or When was the first half of your trip?	25% weekday riders some other day 16 % weekend riders some other day	
How will you return? Or How did you travel on the first half of your trip?	3 percent drive around 4 percent take a different ferry route	
Mode of Access	11% walked, 1% biked, 5% transit, <1% taxi, 57% car driver, 26% car passenger	
Trip Purpose – Weekday	58% work/school, 19% personal bus/other, 23% shopping/recreation	
Trip Purpose – Weekend	15% work/school, 26% personal bus/other, 59% shopping/recreation	
Boarding Method – Weekday	72% drive, 27% walk, 1% bike	

Table 3.1 Origin-Destination Survey Systemwide Summary (continued)

Characteristic	Summary	New Item
Boarding Method – Weekend	82% drive, 17% walk, 1% bike	
Vehicle Type	Auto – 56.8% SUV – 17.5% Van – 6.9% Pickup – 12.7% Commercial vehicle – 1.0% Motorcycle – 2.1% Camper – 0.1% RV – 0.1% School bus – 0.2% Public transit bus – 0.5% Carpool vehicle – 0.5% Vanpool program vehicle – 1.7% Other, specify – 0.1%	
Reasons for Vehicle Boarding	Need vehicle at destination – 58% Vehicle is necessary for business – 8% Carrying baggage – 12% Don't like to walk – 1% Mobility impaired – 2% No safe nearby parking – 1% Don't like transit – 3% Transit does not go to destination – 10% Traveling with children or seniors – 4% Other answer – 6%	Yes
Parked a Vehicle	28% weekday, 46% weekend	
Parking Location	On street – 19.3% Nearby parking lot/garage - 65.5% Other – 15.3%	
Parking Cost	Average $5 weekday, $6 weekend (of those who paid to park)	
Subsidized Parking	5% of weekday parking is subsidized 1% of weekend parking is subsidized	Yes
Bike or Vehicle at Destination	Vehicle: 27% weekday, 21% weekend Bike: 3% weekday, 2% weekend	Yes
Average monthly transit cost	Average: $52 weekday, $31 weekend	Yes
Mode of Egress	10% walked, 1% biked, 6% transit, <1% taxi, 58% car driver, 25% car passenger	
Travel Party Size	Average: 1.5 weekday, 1.9 weekend	

Table 3.1 Origin-Destination Survey Systemwide Summary (continued)

Characteristic	Summary	New Item
Fare Type	Passenger frequent user coupon – 11.7% Washington State Ferry monthly pass – 5.9% Passenger full fare – 14.0% Employer subsidized pass – 2.3% Free (no fare collected for trip/ fare collected in other direction) – 13.5% Passenger youth fare – 0.1% Passenger with bicycle – 0.2% Motorcycle – 1.2% Recreational vehicle – 0.1% Auto/driver frequent user coupon – 21.6% Auto/driver full fare – 20.2% Combined ferry/bus – 1.2% Truck longer than 20 feet – 0.6% Other ticket type – 7.3%	
Transit Preference	45% of riders would be more likely to change to transit if more options were available	Yes
Work Location	25 percent different than regular workplace on weekdays; 48% different on weekends	Yes
Household Size	Average 2.5 persons per household	
Workers in Household	Average 1.4 workers per household	
Vehicles in Household	Average 2.4 vehicles per household	
Age (Year Born)	Average 49 years old	
Occupation Status	75% workers, 4% students, 2% military, 19% other	
Telecommute	20% weekday, 12% weekend	Yes
Days per Week Telecommute	Average: 2.5 days per week among telecommuters	Yes
Household Income (Self-reported)	Average: $96,000 per year	
Willing to Participate in Follow-Up Surveys	63% said they would be willing to participate in a follow-up survey	Yes

3.2 Geographic Travel Patterns

The Washington State Ferries geographic market includes 12 counties in Washington State and British Columbia. The WSF geographic market also includes serving visitors from out-of-state, but these are not included in the evaluation of the geographic market, since they may be from all over the U.S. or the world. Geographic market is defined by the home location of each ferry rider. Similar to the 1999 survey, a raffle of two round trip tickets anywhere in the U.S. was offered to respondents who provided contact information and this helped to generate valid address information for this evaluation.

Figure 3.1 and 3.2 presents the weekday and weekend ferry rider home locations for all routes by boarding method (walk-on and drive-on), respectively. As expected, home locations for walk-on boardings are generally closer to the terminals than those for vehicle boardings. These maps show a similar geographic pattern to the 1999 survey for both weekday and weekend. While it is difficult to discern a change in the origin-destination patterns at this level, there was a distinct pattern found at the route level, where origins and destinations are more dispersed in 2006 than they were in the 1999 survey. This was determined by the fact that the near destinations had fewer trips in 2006 than in 1999 and that there were more trips to destinations that were further away from the ferry terminals in 2006 than in 1999. These patterns are described for individual routes in the Sections 5 through 8 of the report.

The origins and destinations of the interisland San Juan Island trips were not included in this analysis because the data collected did not provide enough samples for reasonable expansion and the detailed counts needed for expansion were not available for this analysis. In addition, the trips to and from the San Juan Islands were considered sufficient for systemwide analysis, but more surveys should be collected in more detailed analysis of this geographic market is desired.

Figure 3.1 Weekday Market Served – Rider Home Locations for All Routes

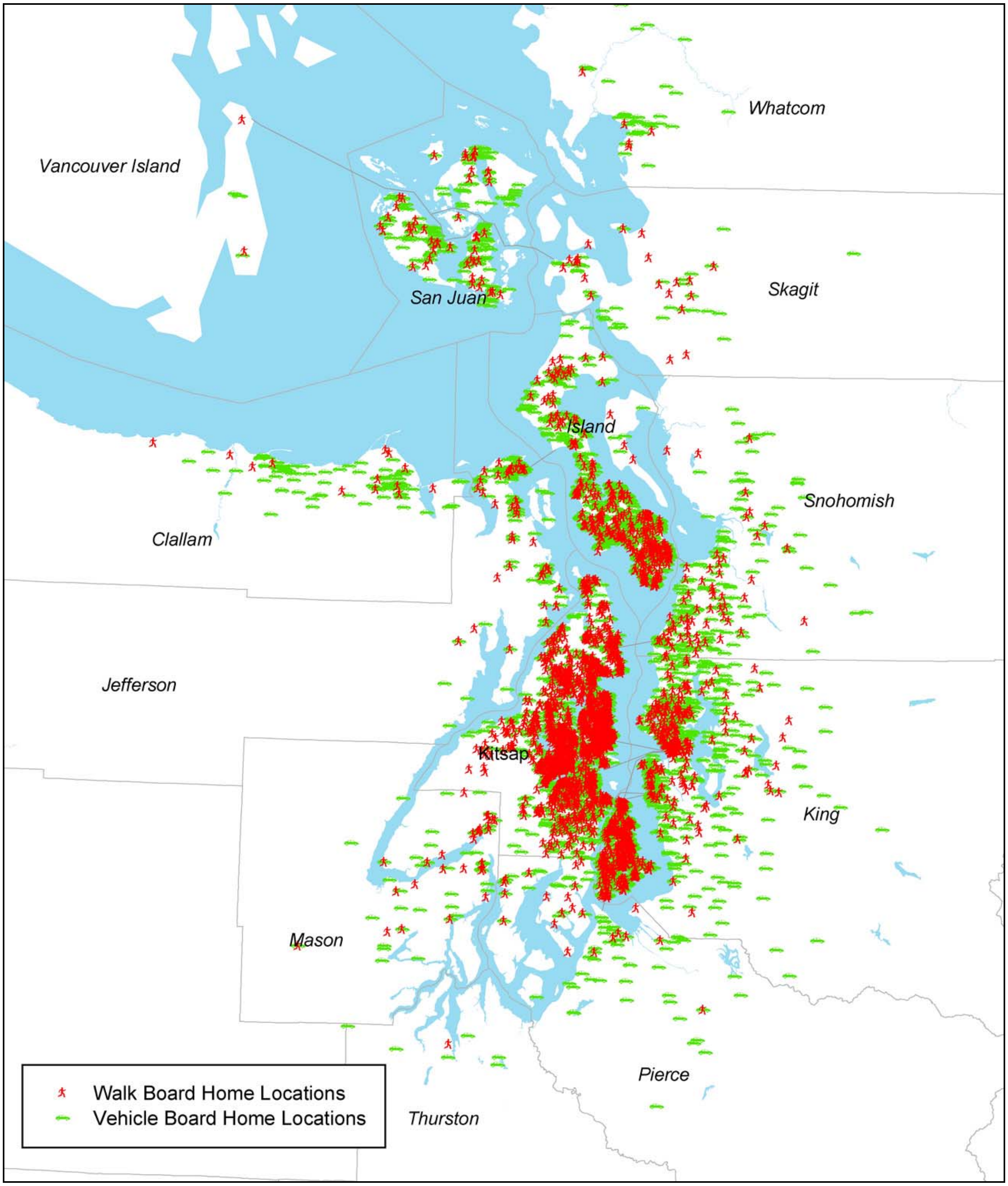
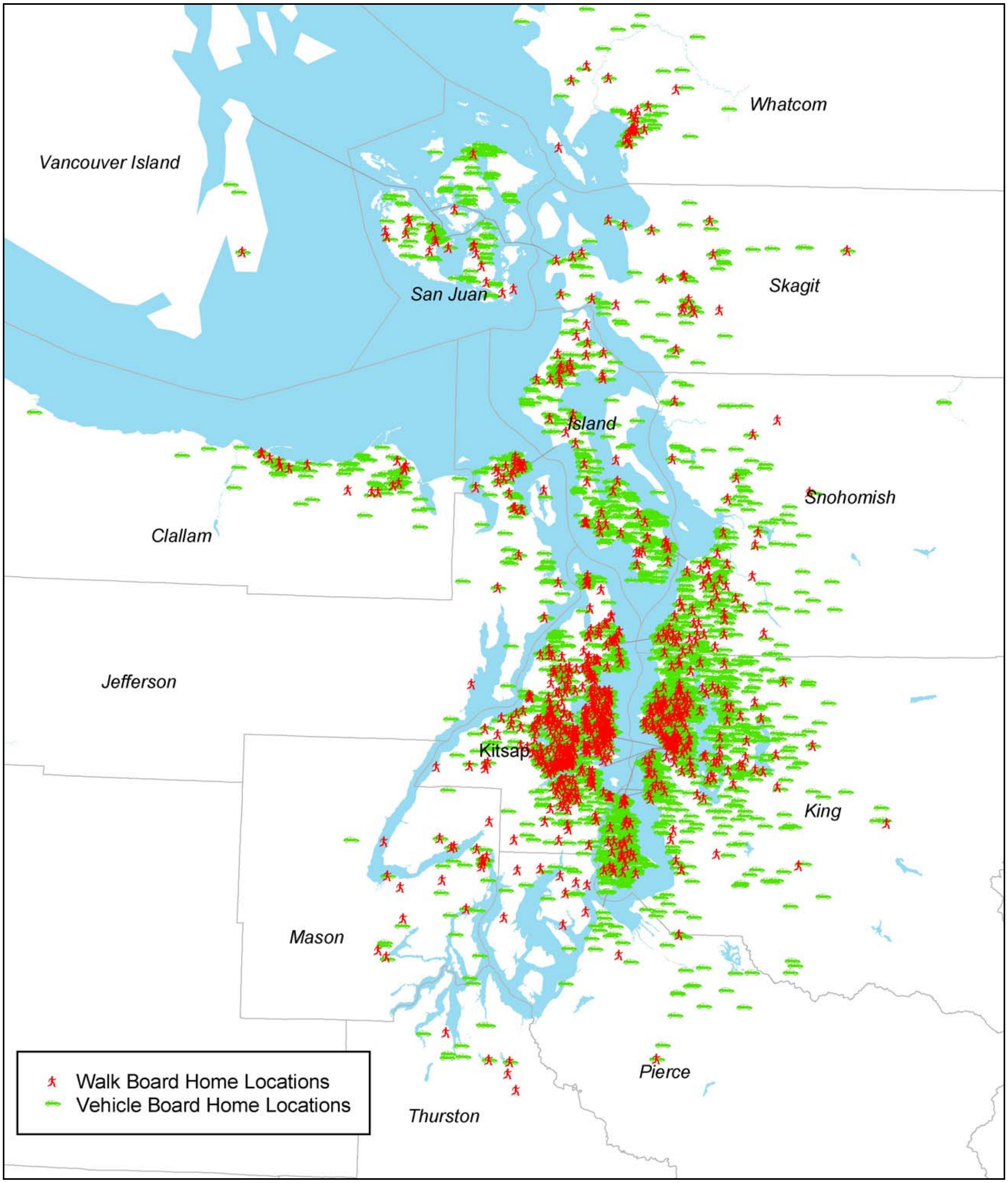


Figure 3.2 Weekend Market Served – Rider Home Locations for All Routes



3.3 Ferry Travel Characteristics

3.3.1 Trip Purpose and Frequency

The ferry system is dominated by work trips, with 58 percent of the total travel for work, school, or business purposes, as shown in Table 3.2. These trips also are the most frequent, with more than 51 percent of the trips using ferries five days a week (evidenced by nine or more one-way trips per respondent). Even though work trips are the most dominant trip purpose, they have been declining as a percent of total trips since 1993. There were 68 percent work trips in 1993, 60 percent in 1999, and 58 percent in 2006. This may be due to a variety of factors: more telecommuting, more job opportunities on both sides of Puget Sound, and more people who can work at home full-time.

One change in recent years affecting the decline of work trips is the increase in telecommuting. In the 2006 survey, 20 percent of weekday riders said that they telecommute at least one day per week. Among these telecommuters, the average number of days each person telecommuted was 2.5 days per week. Although the telecommuting questions were not asked in 1993 or 1999, we assume that the amount of telecommuting in 1993 was smaller, and that this difference accounts for at least a portion of the decline in work trips since then.

3.3.2 Day of Week

Figure 3.3 shows the weekday and weekend trip frequency by day of the week. These charts reflect the weekly travel pattern of those travelers who responded to the survey on Tuesday (for weekdays) and on Saturday (for weekends). This shows that Tuesday riders are most likely to travel again on Thursday, more likely to travel again on Monday and Wednesday, and slightly less likely to travel again on Friday. This does not show that Tuesdays and Saturdays have more travel on average than other days. Weekend riders do not travel much during the week. The 2006 survey was conducted on a Saturday, rather than a Sunday, and these results show that Saturday travelers are not very likely to also travel on a Sunday. About 30 percent of the Saturday travelers also travel on a weekday.

Table 3.2 Systemwide Trips by Purpose and Frequency

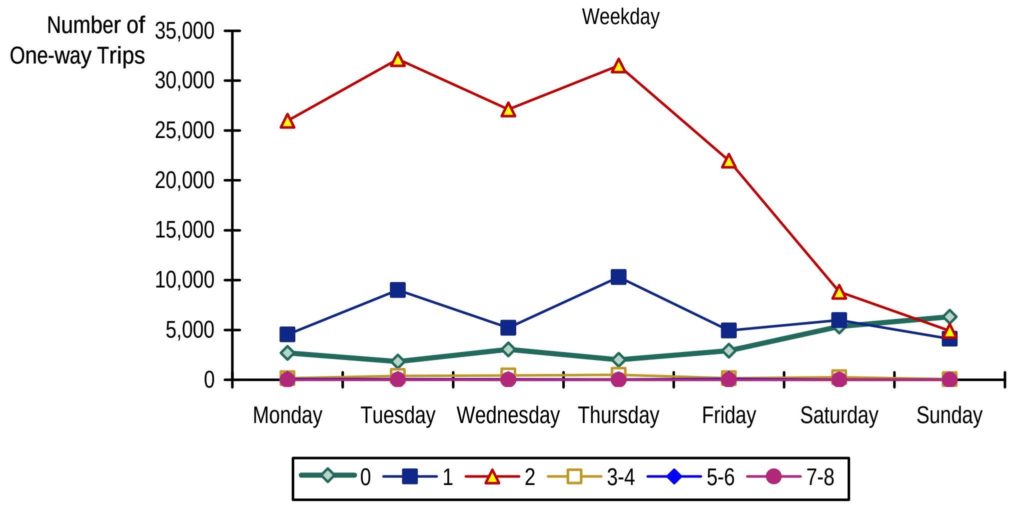
What is/are the reason(s) you are riding this ferry today? How many one-way trips have you taken on a Washington State Ferry in the past seven days, including this ride?

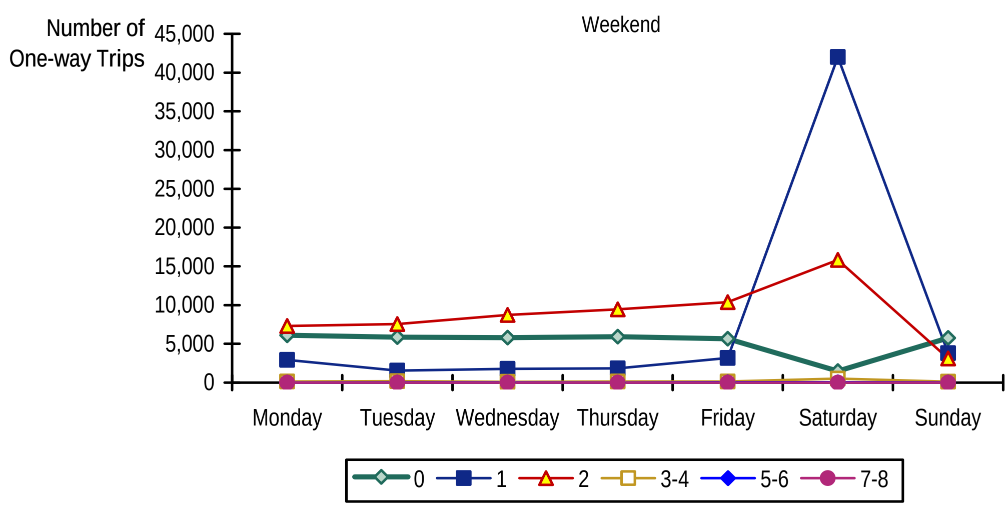
Frequency	Work/ School	Personal Business/ Other	Recreation/ Shopping	Total	All Purposes			Work/School	
					2006	1999	1993	2006	1999
Weekday									
1	1,542	2,046	4,045	7,633	12.5%	14.2%	20.7%	4.3%	6.4%
2	3,936	4,087	4,939	12,962	21.3%	16.9%	13.2%	11.1%	8.3%
3-4	3,602	3,104	3,061	9,767	16.0%	14.6%	11.4%	10.1%	9.4%
5-6	3,719	864	1,026	5,609	9.2%	10.0%	11.3%	10.5%	9.6%
7-8	4,618	492	410	5,520	9.1%	8.9%	5.2%	13.0%	11.6%
9-10	12,773	338	239	13,350	21.9%	22.2%	38.1%	35.9%	34.3%
11+	5,354	352	342	6,048	9.9%	13.2%		15.1%	20.3%
Total	35,544	11,283	14,062	60,889	100%	100%	100%	100%	100%
Percent 2006	58.4%	18.5%	23.1%	100%					
Percent 1999	60.2%	17.0%	22.7%	100%					
Percent 1993	67.5%	9.7%	22.8%	100%					
Weekend									
1	1,860	6,679	18,706	27,245	45.3%	27.9%	44.4%		
2	826	3,009	9,070	12,905	21.5%	36.4%	30.5%		
3-4	1,414	3,703	4,089	9,206	15.3%	16.8%	11.6%		
5-6	710	640	1,155	2,505	4.2%	6.3%	4.5%		
7-8	763	456	634	1,853	3.1%	2.4%	2.0%		
9-10	1,390	310	555	2,255	3.7%	2.8%	7.0%		
11+	2,064	862	1,263	4,189	7.0%	7.3%			
Total	9,027	15,659	35,472	60,158	100%	100%	100%		
Percent 2006	15.0%	26.0%	59.0%	100%					
Percent 1999	10.0%	17.8%	72.2%	100%					
Percent 1993	15.5%	9.6%	75.0%	100%					

2006 Weekday Trips: 64,842 Missing Trips: 8,533

2006 Weekend Trips: 66,459 Missing Trips: 6,299

Figure 3.3 Systemwide Frequency of Trips by Day of Week
How Many One-Way Trips Have You Taken on Monday, Tuesday, etc.





Note: These charts reflect the weekly travel patterns of those travelers who responded to the survey on Tuesday (for weekdays) and on Saturday (for weekends). This does not show that Tuesdays and Saturdays have more travel on average than other days.

Table 3.3 presents the systemwide trips by direction and time-of-day. Overall, 76 percent of trips in the p.m. peak period are traveling westbound. This compares to 67 percent traveling westbound in the p.m. peak period from the 1999 survey. This increase from 1999 to 2006 is consistent across most of the routes. There is a corresponding decrease in p.m. peak period trips traveling eastbound between 1999 and 2006. Systemwide, 41 percent of total trips occurs in the p.m. peak period.

Table 3.3 Systemwide Trips by Direction and Time-of-Day

	Night (7 p.m. – 5 a.m.)	A.M. Peak (5 a.m. – 9 a.m.)	A.M. Offpeak (9 a.m. – 12 p.m.)	P.M. Offpeak (12 p.m. – 3 p.m.)	P.M. Peak (3 p.m. – 7 p.m.)	Total	Percent of Total	Percent of P.M. Peak
Weekday								
Eastbound	2,686	7,283	5,591	3,020	6,472	25,054	39%	24%
Westbound	8,555	2,510	2,383	6,251	20,076	39,773	61%	76%
Total	11,241	9,793	7,974	9,271	26,548	64,827	100%	100%
	17%	15%	12%	14%	41%	100%		

Note: Weekend trip expansion factors were based only on midday surveys, so no night time period surveys were available for expansion and for many routes, there were limited surveys for the morning and evening time periods. As a result, weekend trips by time period are not reported, as the expansion results are unreliable.

3.3.3 Round Trip Patterns

The vast majority of ferry travelers in 2006 make a round trip on the same day, as shown in Figure 3.4. This also was true in 1993 and 1999, but the percent of travelers making round trips on the same day has declined since 1993 for weekday travelers and increased for weekend travelers since 1993. The increase in same day round trip travel for weekend travelers is likely a result of the fact that Saturday travelers are more likely to be day-trippers than Sunday travelers, which are more likely to be weekend travelers (i.e., leave on Friday, return on Sunday).[14] The decrease in same day round trip travel for weekday travelers may be because rising fares have caused people to take fewer overall trips, but to extend the stay of individual trips from one day to two or more days.

A high percent of people taking round trips use the same ferry route for the return trip (94 percent), with another four percent of travelers returning on a different ferry route, and the remaining three percent driving around.[15] The people taking a different ferry route are more likely to be travel for recreational purposes who are visiting more than one location across the Sound. There is an increase in people taking the same ferry route on the return trip in 2006 from 1999 and 1993 for both weekday and weekend travelers, which may be due to increased gas prices (causing travelers to drive less) or differences in travel behavior between October and May (travelers are more likely to be visiting or recreating in May than October).[16] These round trip patterns are presented in Figure 3.5.

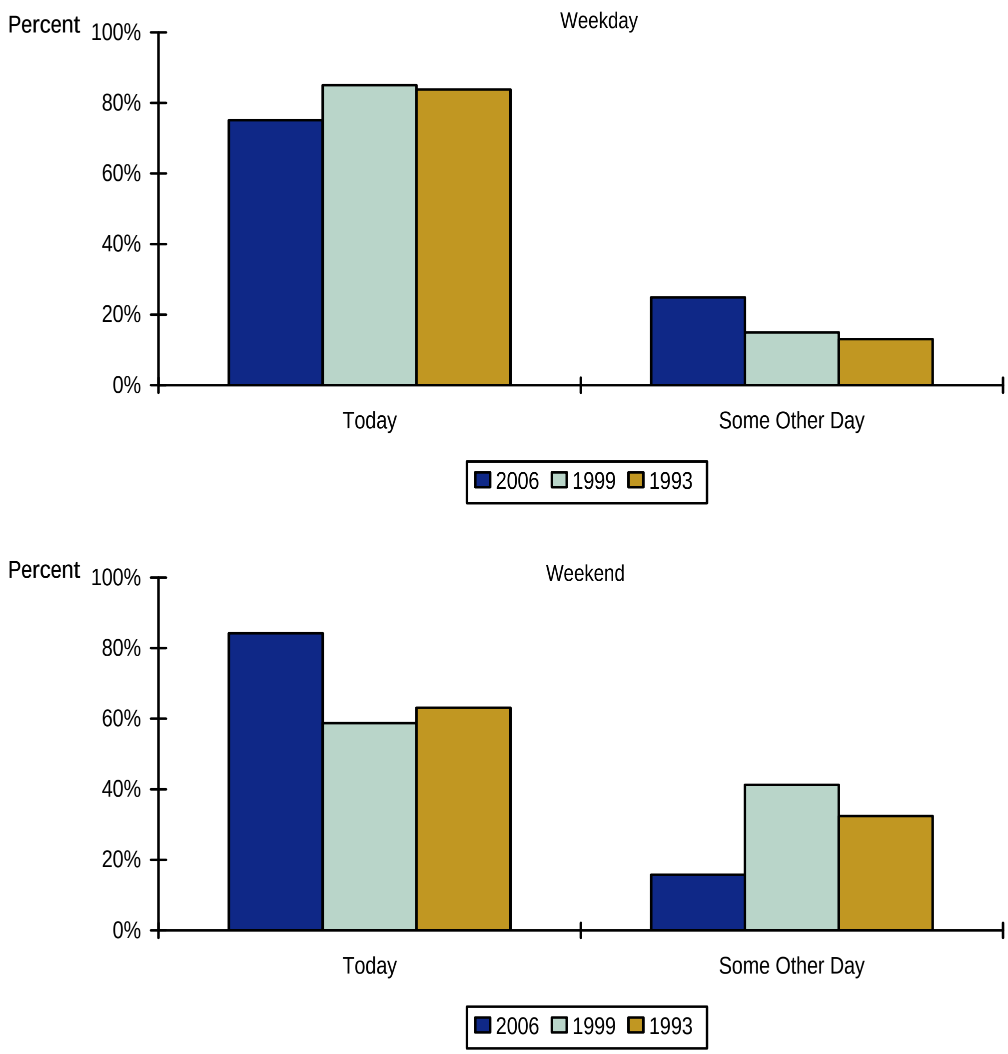
[14] The 2006 survey was conducted on a Saturday, while the 1993 and 1999 surveys were conducted on Sundays, to represent weekend travel.

[15] It should be noted that there is likely a slightly higher percentage of people who take the ferry in the a.m. period and drive around for their return trip because the ferry is cheaper in the eastbound direction. All WSF surveys were collected during the p.m. period.

[16] The 2006 survey was conducted in October, and the 1993 and 1999 surveys were conducted in May.

Figure 3.4 Systemwide Round Trip Patterns by Day

When will you return? When was the first half of your trip?

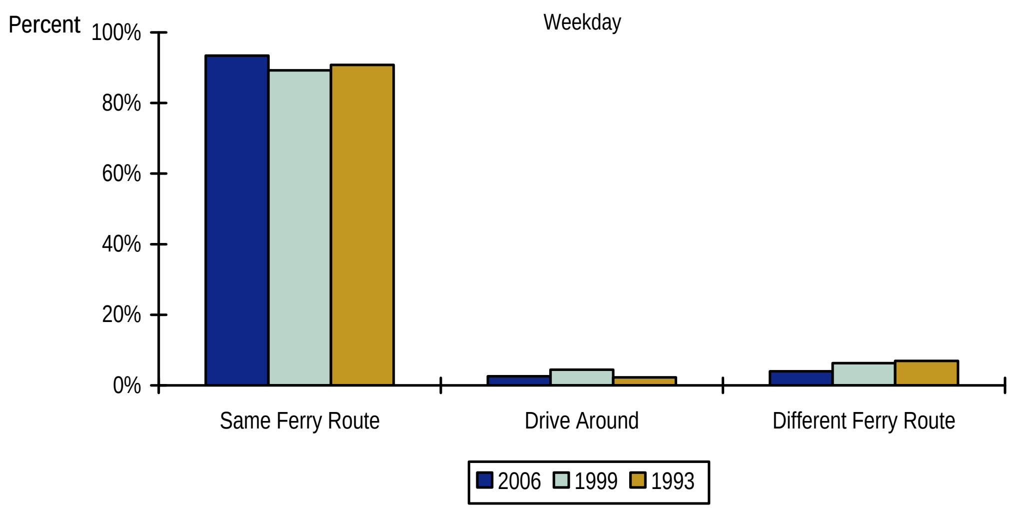


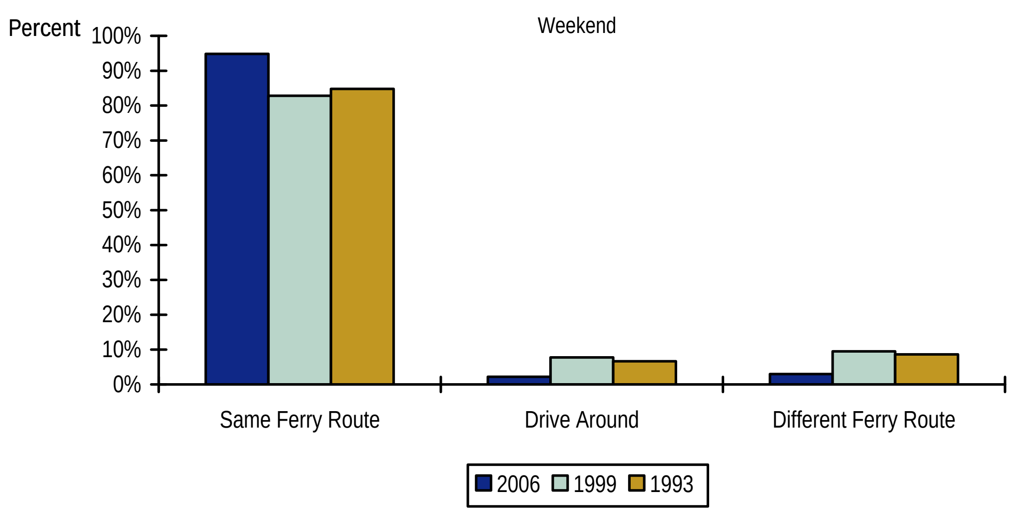
2006 Weekday Trips: 64,842 Missing Trips: 1,170

2006 Weekend Trips: 66,459 Missing Trips: 1,088

Figure 3.5 Systemwide Round Trip Patterns by Route

How will you return? How did you travel on the first half of your trip?



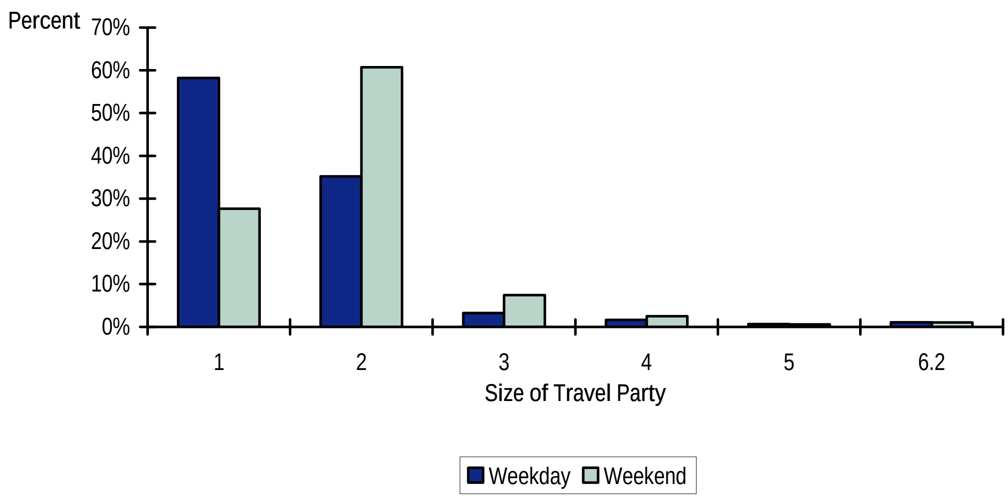


2006 Weekday Trips: 64,842 Missing Trips: 1,653

2006 Weekend Trips: 66,459 Missing Trips: 1,287

Figure 3.6 presents the size of the travel party for weekday and weekend travelers. As expected, the majority of people traveling together occur on the weekends (61 percent) and the majority of people traveling alone occur on the weekdays (58 percent). This is consistent with the trip purpose for work and non-work trips.

Figure 3.6 Systemwide Party Size
How many people are traveling with you?



Note: The original question asked how many people are traveling with you (not including yourself), but the data implied that most people did not include themselves in the answer, so these data were corrected based on who each respondent was traveling with. The highest category of 6.2 is the average of those traveling with 6 or more people.

3.4 Access and Egress Travel Characteristics

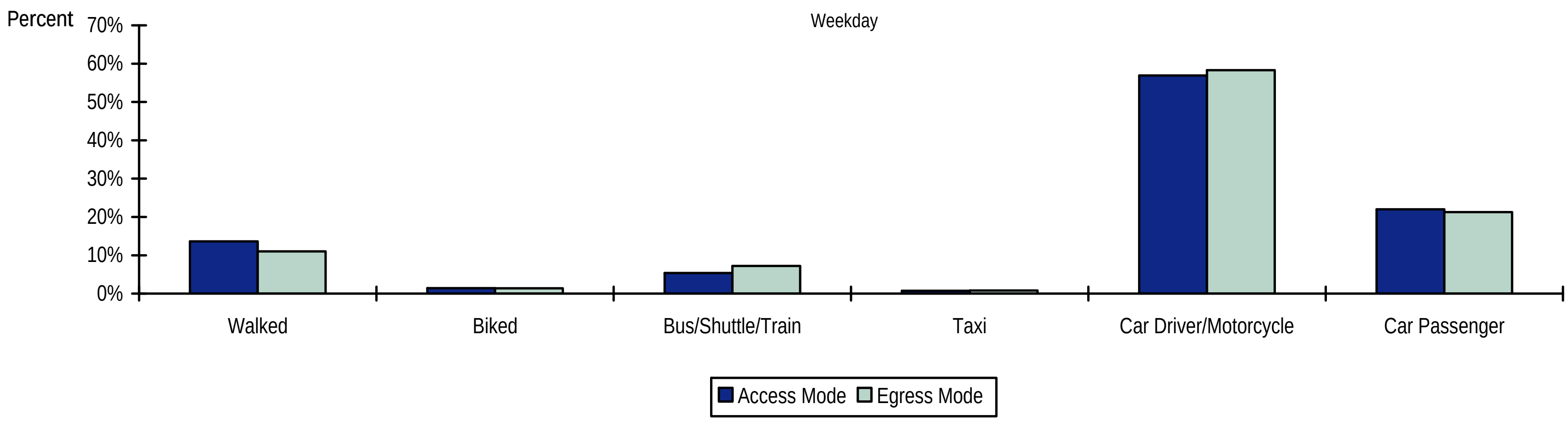
3.4.1 Access, Egress, and Boarding Modes

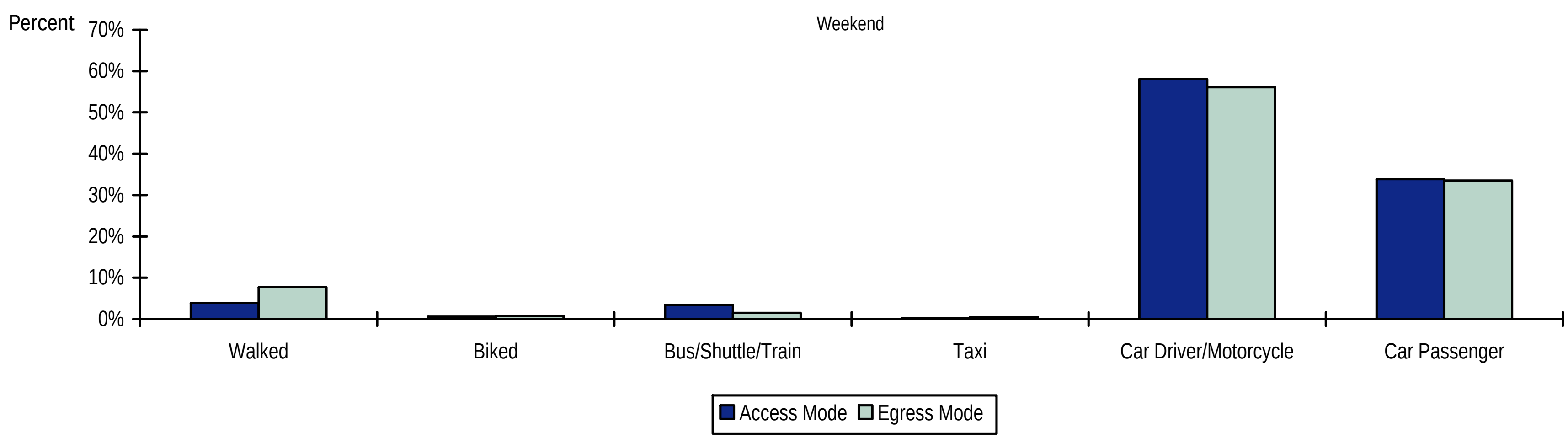
The majority of ferry riders drive a vehicle onboard the ferry system (79 percent) on a daily basis, with another 20 percent walking onboard the ferry and the remaining one percent taking a bicycle onboard. This is higher on weekends (82 percent) than on weekdays (72 percent), as expected. The trend to drive a vehicle onboard the ferry has been increasing over time for weekday travelers, from 55 percent in 1993 to 68 percent in 1999 to the current 72 percent in 2006. The increase is smaller for weekend travelers, from 73 percent in 1993 to 82 percent in 2006, with an decrease from 85 percent in 1999. Average vehicle occupancy also has been declining in this time period, from 2.1 persons per vehicle in 1999 to 1.7 persons per vehicle in 2006.

There is a higher percent of walk and transit access trips during the week than on the weekend, but the walk egress trips are slightly lower during weekdays than on weekends, as shown in Figure 3.7. This is because people who travel more frequently on the ferries for work, school, or other purposes, are more likely to choose the reduced fare for passengers than to pay the higher vehicle fares. In addition, daily ferry riders are more likely to learn and use the transit options rather than day-trippers, who may not see the need to learn and use the transit options. Conversely, there are 50 percent more car passengers on the

Figure 3.7 Systemwide Access and Egress Modes

How did you travel from your origin location to this sailing?
How will you travel to the destination you are going to now?





weekend than on the weekday, because these trips are more likely to be for shopping or recreation purposes, leading to a higher likelihood of traveling with others for these purposes.

Tables 3.3 and 3.4 provide a more detailed view of access and egress modes, by boarding mode. There is a trend towards fewer walk, bike, taxi, and transit access modes between 1993 and 1999 and this has held constant to 2006 for weekday travelers (28 percent in 1993 and 21 percent in 1999 and 2006). Egress walk, bike, taxi, and transit trips were constant between 1993 and 1999 (at 16 percent) and have increased since 1999 (to 20 percent in 2006). Both the weekday transit access and egress modes decrease from 1999 to 2006, even though other non-auto modes stay constant (for access) or increase (for egress). Both car driver access and egress modes have increased slightly between 1999 and 2006, but car passenger access and egress modes have decreased in this same timeframe.

The biggest reason for taking a vehicle on the ferry was that the vehicle was needed at the destination (about 47 percent of weekday travelers taking their vehicle on gave this reason). Three other prominent reasons for weekday travelers taking a vehicle on were that the vehicle is necessary for business, that the traveler had baggage to carry, and that transit did not go to their destination (about 12 percent each answer). A few percent of people gave their response that they do not like to walk, that they were mobility impaired, that there was no safe nearby parking, that transit did not go to their destination, or that they were traveling with children or seniors. The pattern for weekend travelers is similar to that of weekday travelers, except that needing a vehicle at the destination is even more important (almost 70 percent) and as expected there is little need for a vehicle for business reasons. Figure 3.8 presents the results of the travelers' reasons for taking a vehicle on-board the ferry.

Table 3.4 Systemwide Access and Boarding Modes

How did you travel from your origin location to this sailing? How will/did you board this ferry?

Access mode	Drive	Walk	Bicycle	Total	All boardings 2006	All boardings 1999	All boardings 1993
Weekday							
Walked	463	8,306	13	8,782	13.6%	12.1%	17.0%
Biked	45	193	669	907	1.4%	1.2%	1.8%
Bus/Shuttle/Train	566	2,873	14	3,453	5.4%	7.4%	9.2%
Taxi	5	452	0	457	0.7%	0%	0.2%
Car driver/ motorcycle	33,468	3,131	34	36,633	56.9%	54.4%	53.1%
Car passenger	11,799	2,357	3	14,159	22.0%	24.9%	18.7%
Total	46,346	17,312	733	64,391	100%	100%	100%
Percent 2006	72.0%	26.9%	1.1%	100%			
Percent 1999	67.7%	31.2%	1.2%	100%			
Percent 1993	54.9%	43.2%	1.8%	100%			
Weekend							
Walked	87	2,482	0	2,569	3.9%	2.6%	4.9%
Biked	27	31	325	383	0.6%	0.8%	1.9%
Bus/Shuttle/ Train	139	2,113	0	2,252	3.4%	1.1%	2.1%
Taxi	0	144	0	144	0.2%	0%	0.2%
Car driver/ motorcycle	35,110	3,264	95	38,469	58.0%	67.7%	56.6%
Car passenger	19,128	3,335	9	22,472	33.9%	27.8%	34.4%
Total	54,491	11,369	429	66,289	100%	100%	100%
Percent 2006	82.2%	17.2%	0.6%	100%			
Percent 1999	85.7%	13.1%	1.2%	100%			
Percent 1993	73.4%	24.4%	2.2%	100%			

2006 Weekday Trips: 64,842 Missing Trips: 453

2006 Weekend Trips: 66,459 Missing Trips: 168

Table 3.5 Systemwide Egress and Boarding Modes

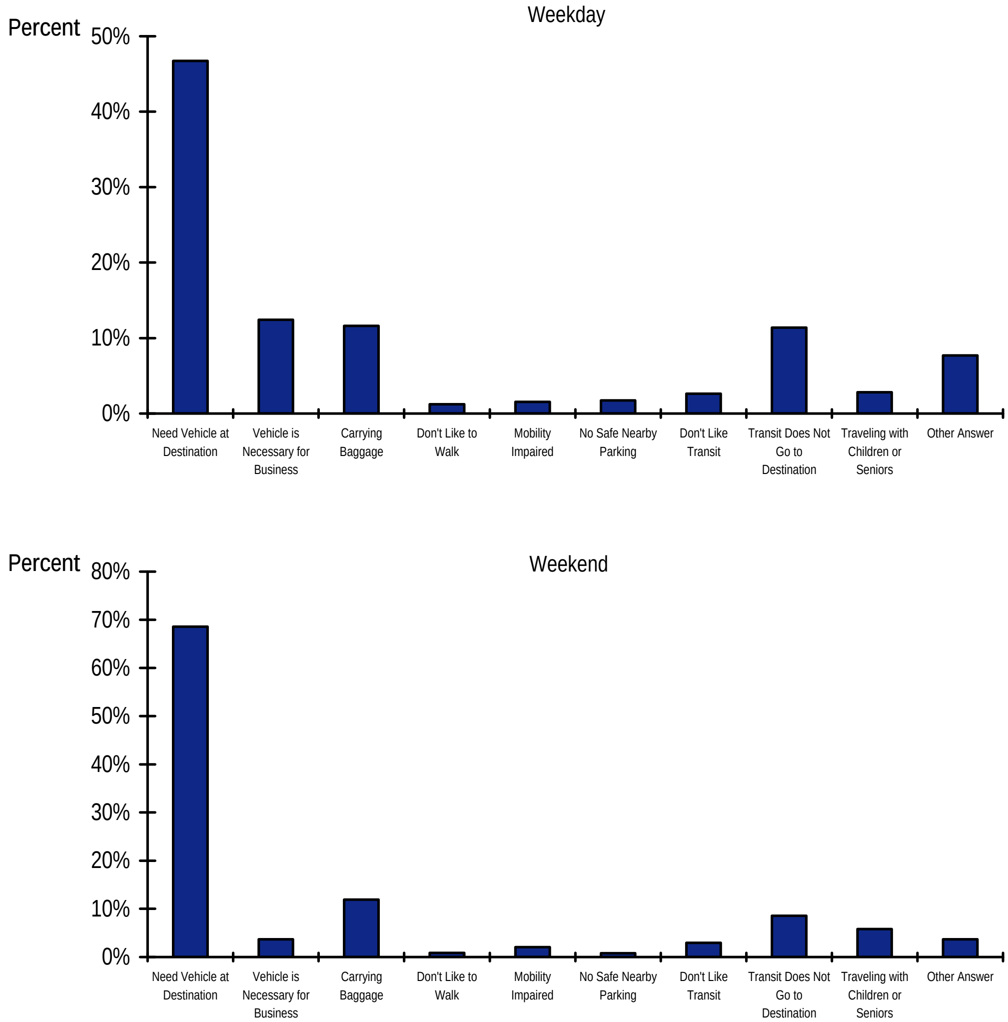
How will you travel to the destination you are going to now? How will/did you board this ferry?

Egress mode	Drive	Walk	Bicycle	Total	All boardings 2006	All boardings 1999	All boardings 1993
Weekday							
Walked	520	6,380	44	6,944	11.0%	5.4%	7.3%
Biked	43	244	592	879	1.4%	1.0%	1.9%
Bus/Shuttle/ Train	401	4,123	5	4,529	7.2%	9.7%	6.0%
Taxi	32	469	0	501	0.8%	0%	0.4%
Car driver/ motorcycle	33,453	3,251	20	36,724	58.3%	57.4%	63.9%
Car passenger	10,826	2,506	54	13,386	21.3%	26.4%	20.4%
Total	45,275	16,973	715	62,963	100%	100%	100%
Percent 2006	71.9%	27.0%	1.1%	100%			
Percent 1999	67.7%	31.2%	1.2%	100%			
Percent 1993	54.9%	43.2%	1.8%	100%			
Weekend							
Walked	176	4,784	0	4,960	7.7%	3.2%	4.2%
Biked	33	21	422	476	0.7%	0.9%	1.6%
Bus/Shuttle/ Train	128	830	0	958	1.5%	0.9%	2.0%
Taxi	19	269	0	288	0.4%	0%	0.4%
Car driver/ motorcycle	33,986	2,371	0	36,357	56.1%	67.0%	57.8%
Car passenger	18,695	3,011	6	21,712	33.5%	27.9%	33.9%
Total	53,037	11,286	428	64,751	100%	100%	100%
Percent 2006	81.9%	17.4%	0.7%	100%			
Percent 1999	85.7%	13.1%	1.2%	100%			
Percent 1993	73.4%	24.4%	2.2%	100%			

2006 Weekday Trips: 64,842 Missing Trips: 1,876

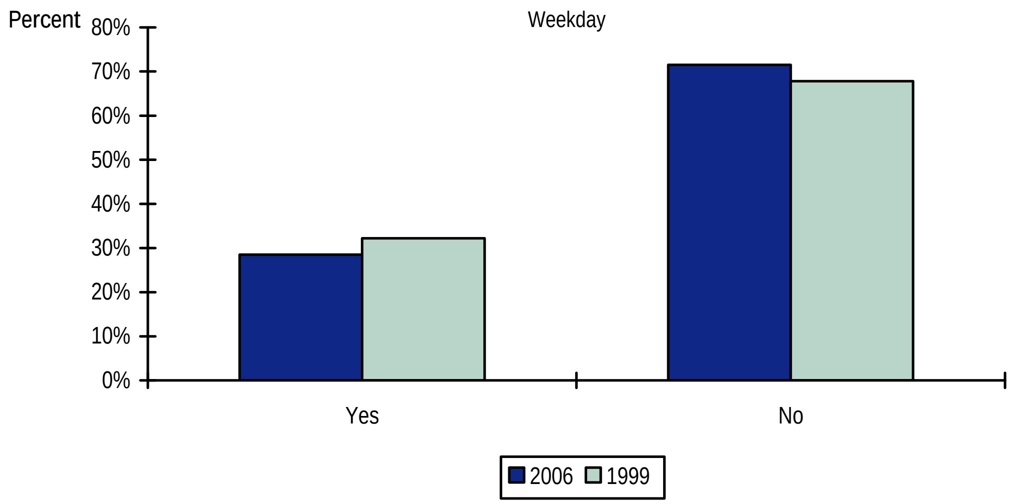
2006 Weekend Trips: 66,459 Missing Trips: 1,704

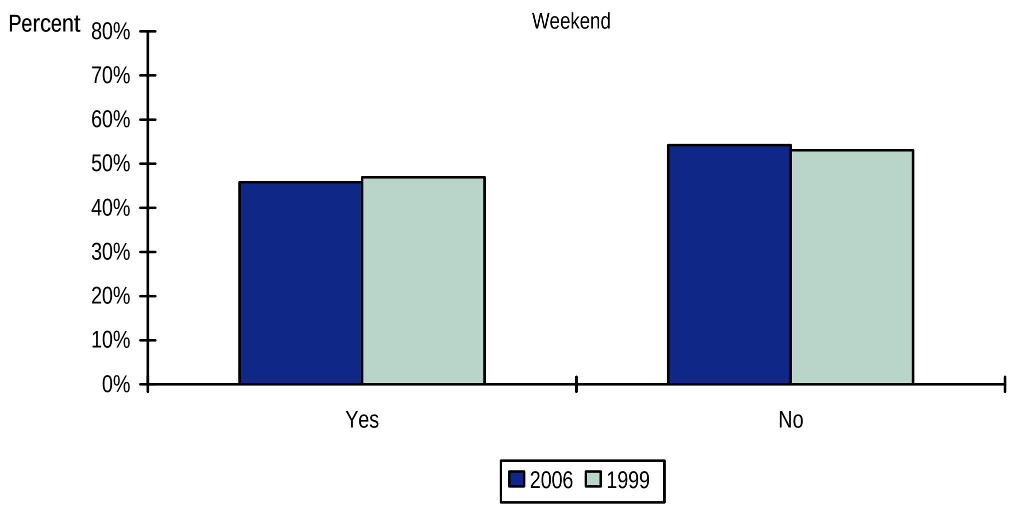
Figure 3.8 Systemwide Reasons for Taking a Vehicle
Why did you choose to board in a vehicle instead of walk-on?



For travelers who travel to the ferry terminal and do not take their car on the ferry, a majority of them do not park their car at the terminal, as shown in Figure 3.9. The weekend travelers indicate a higher degree of parking at the terminal, probably because parking is more available and in some cases less expensive on weekends than on weekdays.

Figure 3.9 Systemwide Non-motorized Boardings
Did you park a vehicle to board this ferry?





A large number of people keep a vehicle at their destination, so that they can drive to their destination, but still walk on the ferry (about 27 percent for weekday, 21 percent for weekend). On the other hand, a much smaller number of people keep bicycles at the terminals for this purpose (about three percent for weekday and two percent for weekend). This is presented in Table 3.5.

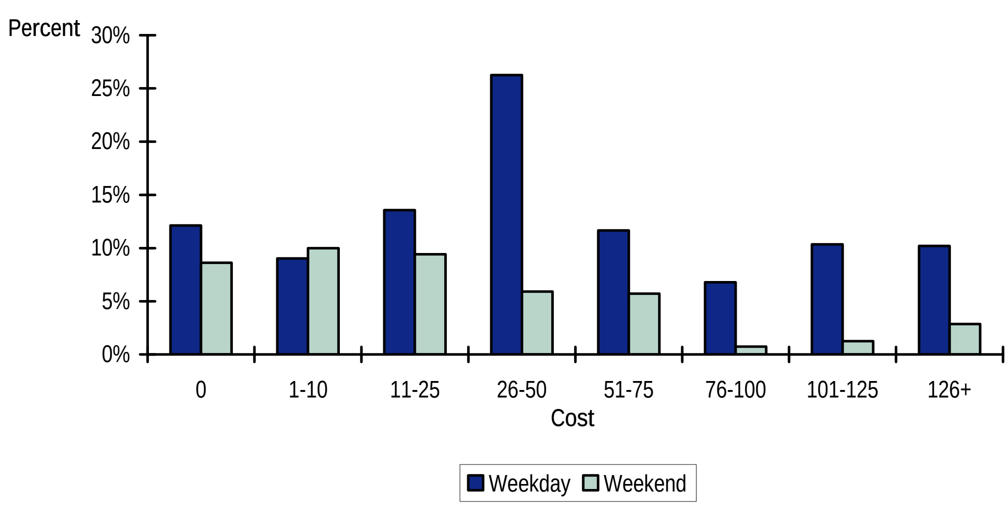
Table 3.6 Systemwide Destination Vehicles
Did you keep either a bike or vehicle at the destination end of this ferry trip?

Egress Vehicle	Riders	Percent of Total
Weekday		
Bike	466	2.6%
Vehicle	4,999	27.4%
NA	12,767	70.0%
Total	18,232	100%
Weekend		
Bike	262	2.2%
Vehicle	2,441	20.5%
NA	9,188	77.3%
Total	11,891	100%

Note: Only asked when boarding mode was walk or bike.

For travelers who ride transit to/from the ferry, the average monthly transit cost is $52 for weekday travelers and $31 for weekend travelers. As expected, weekend travelers are less likely to include travelers who commute or travel regularly by ferry and therefore would not have significant monthly costs for transit access trips. These costs are presented in Figure 3.10.

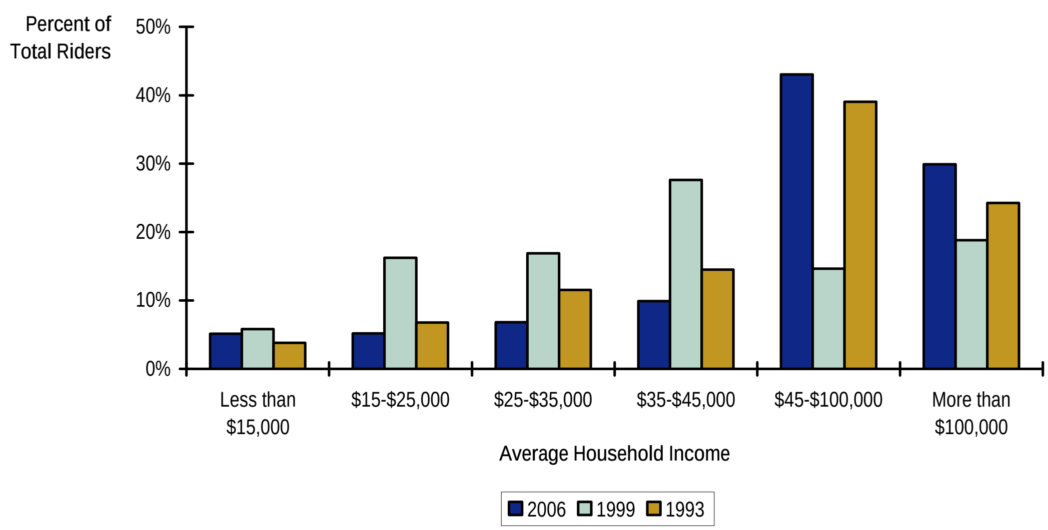
Figure 3.10 Systemwide Monthly Transit Costs
If you ride transit (bus/train), what is the average monthly cost that you pay for transit to/from work or school?



3.5 Demographic Characteristics

Figure 3.11 presents the average self-reported household income of ferry travelers. The average income for ferry travelers is $96,000, which is higher than the regional average self-reported household income of $53,000.[17] Average income also has been increasing since 1999, from $92,000 average household income (in 2006 constant dollars) for ferry riders and $50,000 average household income for all Puget Sound residents. Average income for ferry riders was relatively flat from 1993 to 1999 increasing only at the rate of inflation. The distribution of ferry riders by income group also demonstrates that low and middle income travelers were able to ride the ferries in 1999, but not as frequently in 2006. The majority of ferry riders in 2006 make more than $45,000 annual household income per year.

Figure 3.11 Systemwide Traveler Income by Survey Year
What was your estimated household income in 2005 before taxes?

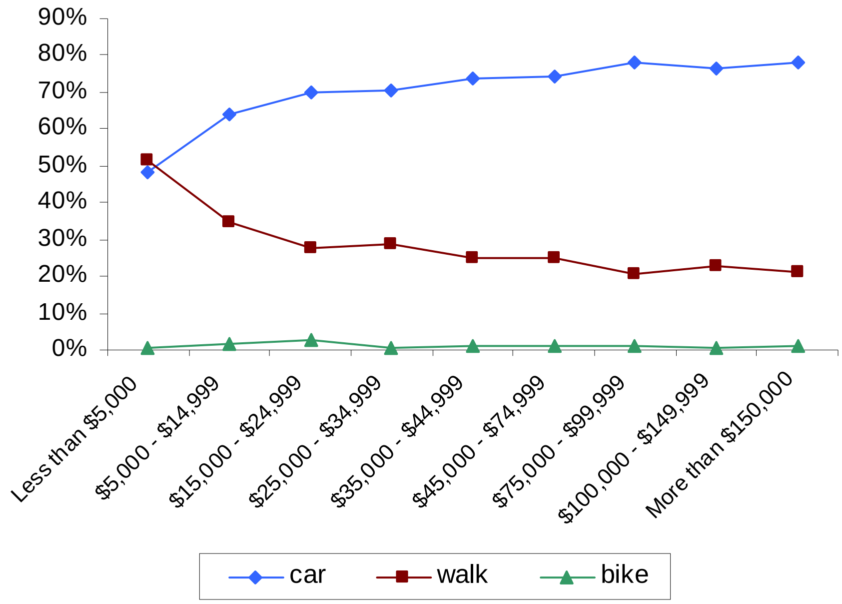


Another interesting evaluation on income is by comparing average household income to boarding mode. This is presented in Figure 3.12. This shows a clear trend for lower income travelers to walk on board more often than higher income travelers. Even though the trend continues for all income groups, it is most distinct for average incomes below $25,000 per year. We also reviewed statistics on keeping a vehicle at the destination terminal by income group. This review showed that there were a higher number of low income travelers (5 percent) who kept a vehicle at the destination terminal than high income

[17] Regional averages were provided by the Puget Sound Regional Council from the 1999 and 2006 household travel surveys.

travelers (2 percent).

Figure 3.12 Systemwide Traveler Income by Boarding Mode
What was your estimated household income in 2005 before taxes?



The average age for ferry travelers is presented in Figure 3.12. The average age for weekday travelers is 48 and the average age of weekend travelers is 49. This is higher than the regional average age of 35. It also has been increasing over time, from an average age of 42 in the 1993 survey to 48 in the 2006 survey. The distribution of the ferry riders by age group also demonstrates that the average age has been increasing over time. The increase in average age may be contributing to reductions in work travel because on a national scale, older workers tend to work more limited hours and tend to work at home more often than younger workers.

The average number of vehicles owned per household has been increasing slightly for ferry riders, from 2.22 vehicles per household in 1993 to 2.36 vehicles per household in 2006. This is higher than the regional average of 1.8 vehicles owned per household.

There are about 1.3 workers per household in the 2006 survey. This is similar to the regional average of 1.4 workers per household. About 37 percent of the total ferry riders come from two-worker households. Data on number of workers was not collected during the 1999 or 1993 survey so we could not determine the trend. Of the weekday ferry riders, 77 percent said they were employed, up slightly from the 75 percent reported in the 1999 survey.

Figure 3.13 Systemwide Traveler Age
In what year were you born?