



2015 Pierce County Waterborne Transportation Study



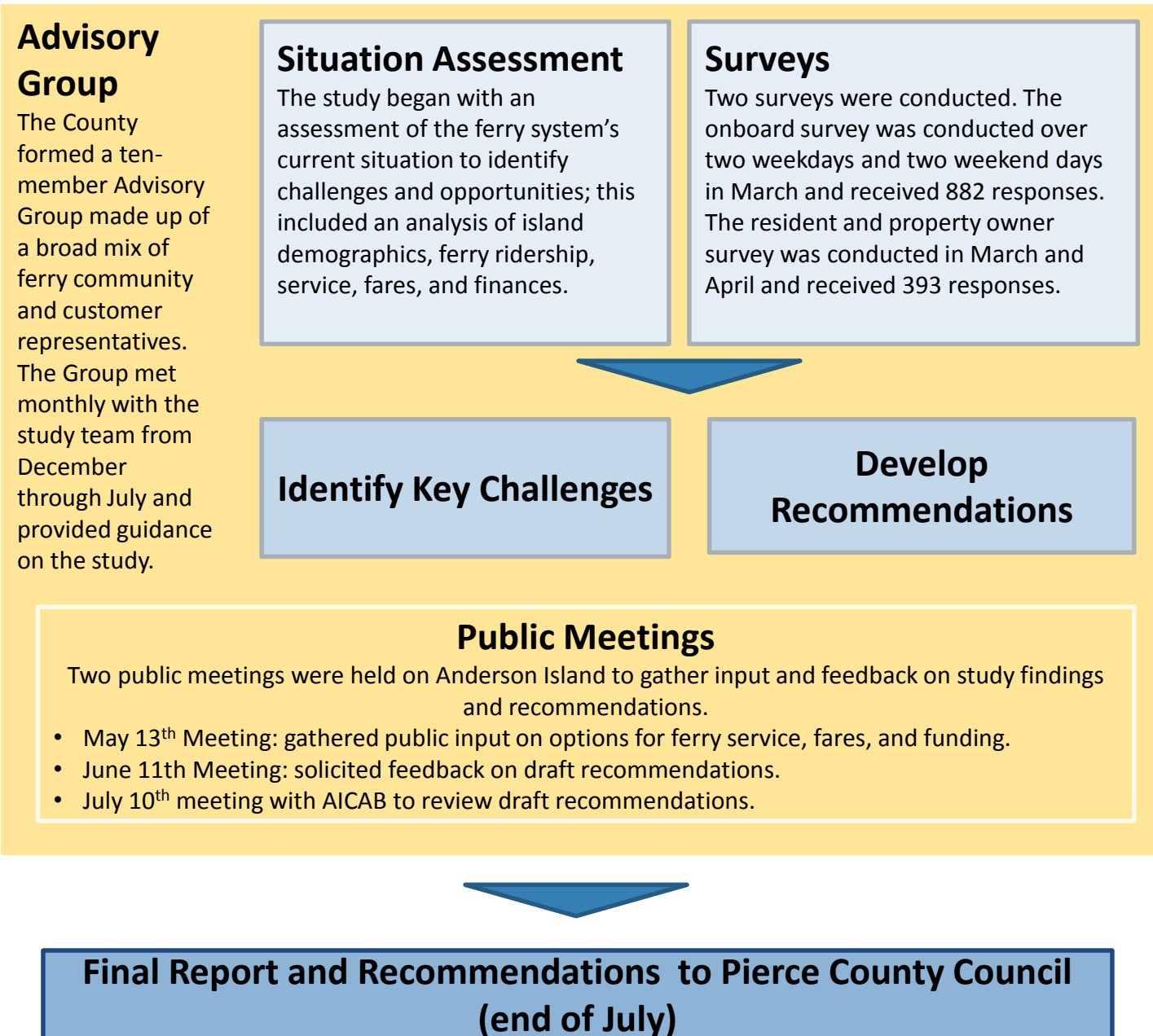
Presentation to the Anderson Island Citizens' Advisory Board (AICAB)

July 10, 2015

About the Study

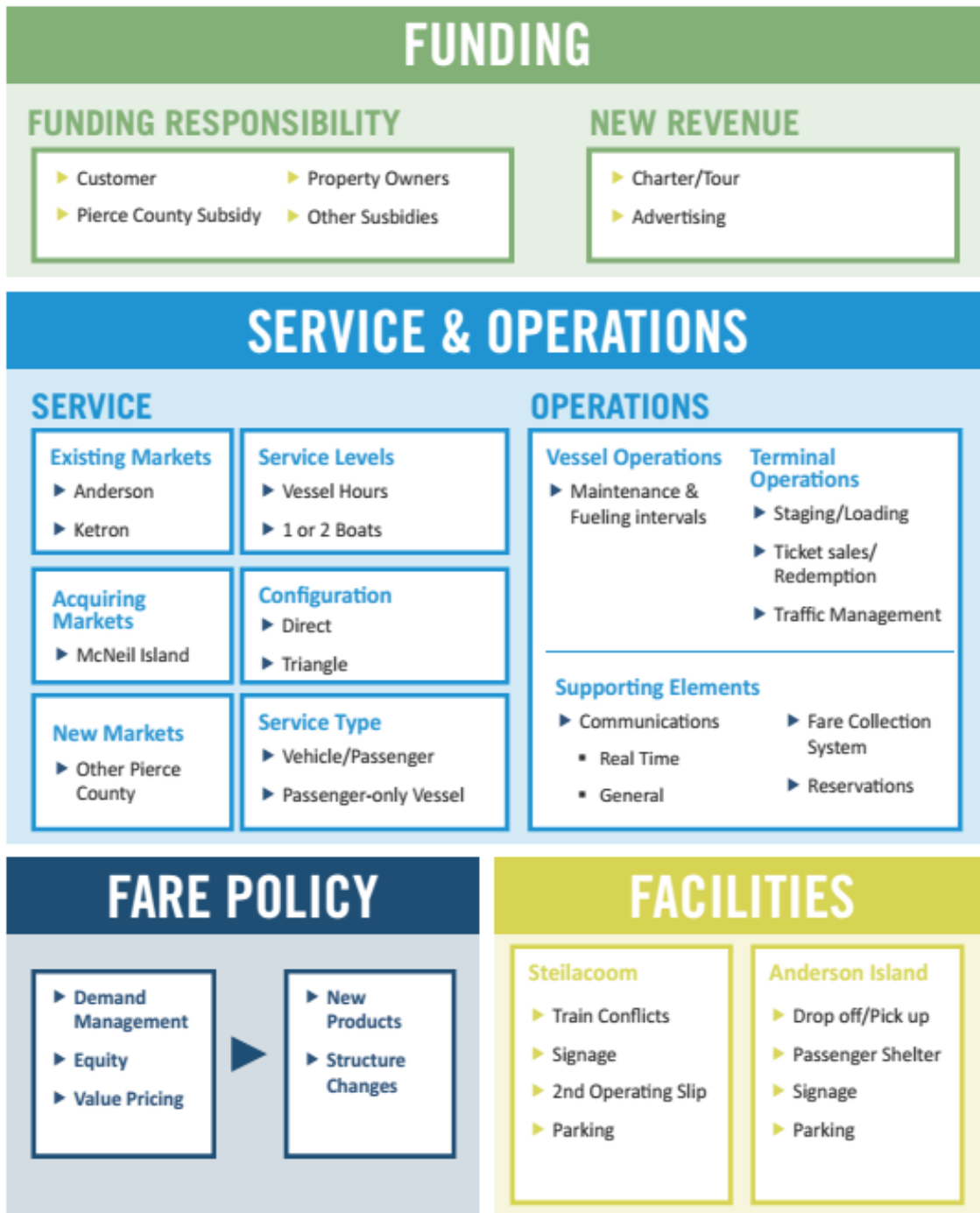
The purpose of the Pierce County 2015 Waterborne Transportation Study (WTS) is to identify key issues facing the Pierce County ferry system and recommend policies to maintain the long-term financial sustainability of the system. The study is an update of the last WTS, completed in 2003.

Process and Methods



Analytical Framework

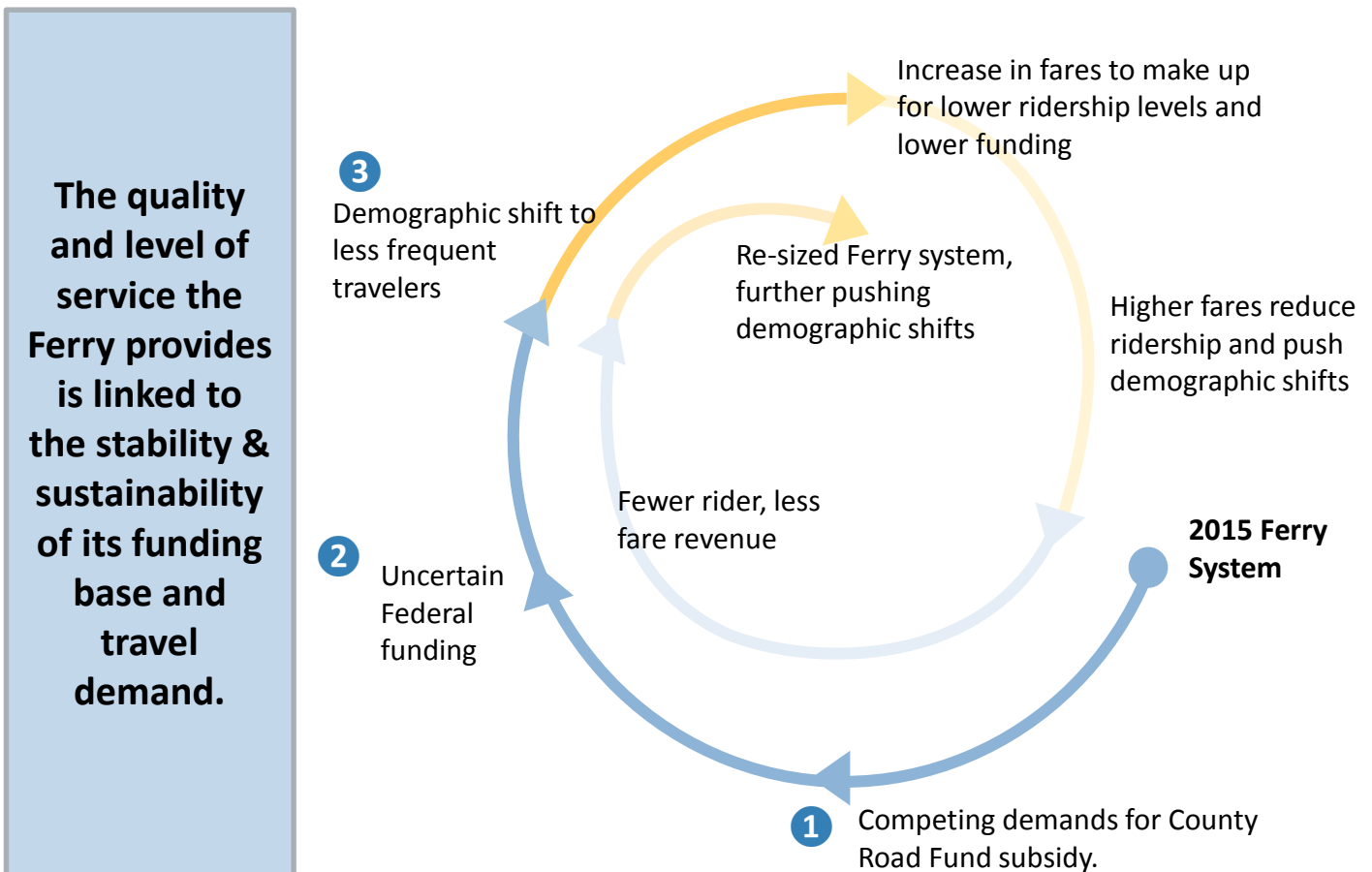
The study was a comprehensive examination of many aspects of the Pierce County ferry system. The graphic below summarizes the main topics in funding, service & operations, fare policy, and facilities.



Findings about Key Challenges

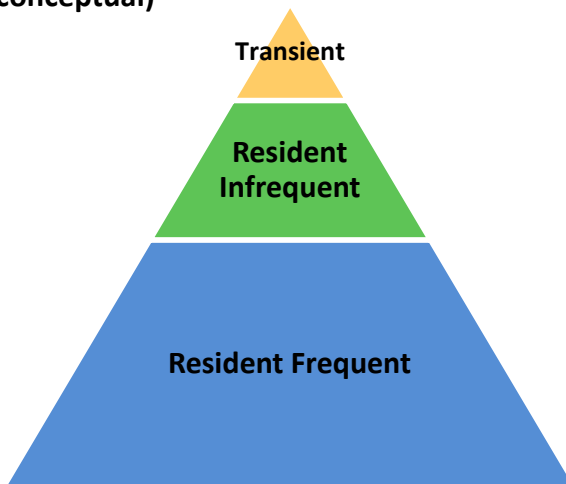
The situation analysis and surveys revealed that the Pierce County ferry system is facing a fundamental challenge as it looks to remain financially sustainable over the long-term. There are three critical and inter-related elements of this challenge:

- 1 The County Road Fund is under increasing financial pressure;
- 2 Federal funding is not guaranteed to continue,
- 3 The market is limited and demographics are changing, which creates fare revenue risks.



Primary Focus of Draft Recommendations: Maintain a balanced ridership base with a sustainable mix of travel patterns.

Fare Revenue Contribution (conceptual)

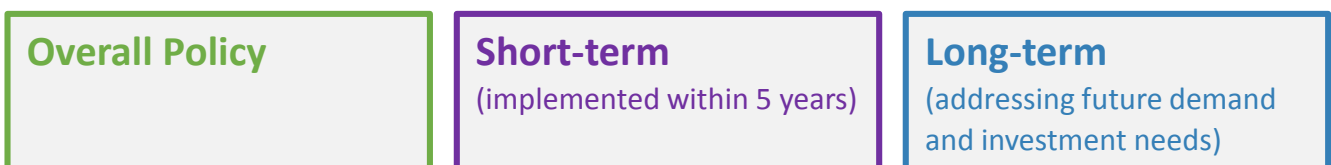


- It can take 5-10 households with infrequent travel patterns to replace a single household with a frequent travel pattern.
- Current demographic trends and the Island’s rural designation will likely create continued shift to more infrequent traveling residents.
- When a larger share of trips become discretionary, then ridership could become more sensitive to fare changes.

Our draft recommendations are designed to address these fundamental challenges and help achieve a sustainable mix of travel patterns by:

- Establishing clear funding policies, including explicit roles for fare revenues and County Road Fund contributions, to guide future fare and service decisions
- Identifying opportunities to broaden the funding base to relieve pressure on both the fare base and the County Road Fund
- Aligning service and fare policies to maximize the County’s ability to meet fare revenue targets and support a balanced and growing mix of customers
- Identifying cost effective ways of delivering services and increasing customer satisfaction

Recommendations on the following pages come in three categories:



Overall Policy Recommendations

Long-Term Financial Sustainability

- Implement a formula-based fare revenue target for predictability and funding reliability
- Broaden funding base by changing ferry district statute to allow for passenger-vehicle service
- Develop a fuel surcharge policy to mitigate the impacts of an increase in the price of fuel
- Explore opportunities to grow non-fare operating revenues and develop specific strategies

Level of Service

- Add flexibility to Level of Service language to add capacity or implement operational or pricing demand management strategies
- Develop a Summer Level of Service standard based on Friday/Sunday with a focus on full day utilization

Technology and System Investments

- Acquire new fare collection system to allow for reservations and customer accounts
- Make communication system improvements to reduce congestion, increase vessel utilization, and enhance customer satisfaction

County Ferry Operators Group

- Explore opportunities for sharing costs and leveraging resources

Short-term Recommendations

(implemented within 5 years)

Service Enhancements

- Extend current weekday schedule
- Add summer 2-boat service on Friday and Sunday
- Add a mid-afternoon Ketron departure on Tuesdays

Fare Structure

- Add small car fare category
- Standardize oversize fare on a linear foot basis
- Increase summer surcharge on vehicles 25% to 30%
- Increase vehicle-passenger fare ratio gradually
- Change youth fare to half of full passenger fare
- Create a frequent use discount following implementation of account-based system
- Add monthly passenger pass

Steilacoom Terminal Changes

Improve operational effectiveness and customer satisfaction by:

- Aligning transit and ferry schedules
- Establishing a formal drop off/pick up procedure with signage
- Add and improve signage at the terminal and on Anderson Island
- Consider kiosk sales at the terminal

Long-term Recommendations

(addressing future demand and investment needs)

Address Future Demand

Step 1: Manage Demand through Operating and Pricing Strategies

- Introduce a targeted or widespread reservation system
- Modify the pricing structure to encourage changes in customer behavior and travel patterns

If demand outstrips demand management options, seek to add capacity.

Step 2: Expand Service

- Add additional 2-boat service days during the summer schedule
- Extend the summer schedule season
- Further expansion of the service day

Future Operational and Pricing Strategies to Manage Demand

- Target reservations to alleviate pressing congestion challenges
- Enhance real-time customer communications
- Align price with demand through time of day pricing, day of week pricing, or through two-way collection fares

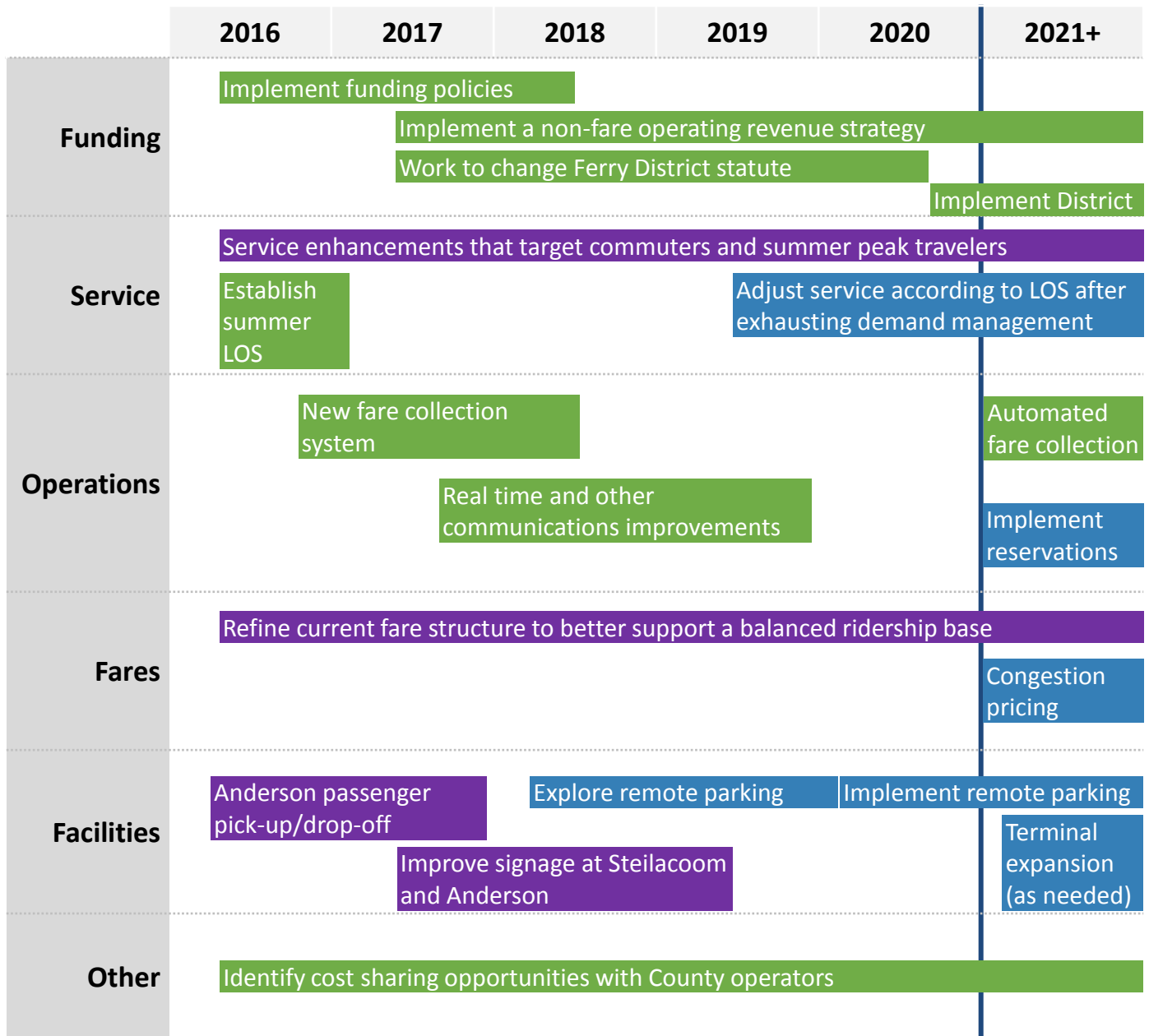
Potential Future Investment Needs at Steilacoom Terminal

- Expand the terminal to run a two-boat operation regularly
- Streamline ticketing and processing of vehicles through automated measurement and fare determination
- Support remote parking facilities with shuttle service or establish shared parking at existing public facilities

**To be effective, the strategies described may require additional facility investment.*

Conceptual Action Plan: In the next five years, the County can take action on many of the short-term recommendations and begin to lay the groundwork for the long-term recommendations and policy work.

Overall Policy
Short-term
Long-term



Note: Most action items will have budget implications, so ultimate timing will depend on funding availability

Preliminary Draft 2015 Fare Proposal Elements: A preliminary fare proposal for implementation in Fall 2015 includes the following elements:

- Base fare increase (3.5% for vehicles, 2.5% for passengers)
- Increase the summer surcharge from 25% to 30%
- Increase youth discount from 35% to 40% (phase 1)

	Current		2015 Fare Proposal		Change		Pct Change	
	Base	Peak	Base	Peak	Base	Peak	Base	Peak
Passengers								
Adults	\$ 5.30	\$ 5.30	\$ 5.45	\$ 5.45	\$ 0.15	\$ 0.15	2.8%	2.8%
Youth (5-18)	\$ 3.40	\$ 3.40	\$ 3.25	\$ 3.25	\$ (0.15)	\$ (0.15)	-4.4%	-4.4%
Children	free	free	free	free	--	--	--	--
Sr/Disabled	\$ 2.65	\$ 2.65	\$2.70	\$ 2.70	\$ 0.05	\$ 0.05	1.9%	1.9%
Value Pass								
Passenger	\$ 21.20	\$ 21.20	\$ 21.80	\$ 21.80	\$ 0.60	\$ 0.60	2.8%	2.8%
Motorcycle	\$ 38.30	\$ 38.30	\$ 39.70	\$ 39.70	\$ 1.40	\$ 1.40	3.7%	3.7%
Standard vehicle	\$ 71.20	\$ 71.20	\$ 73.40	\$ 73.40	\$ 2.20	\$ 2.20	3.1%	3.1%
Vehicles (includes driver)								
Standard vehicle (up to 21')	\$ 17.80	\$ 22.30	\$ 18.35	\$ 23.85	\$ 0.55	\$ 1.55	3.1%	7.0%
Vehicle and Sr/Disabled	\$ 14.85	\$ 18.65	\$ 15.25	\$ 19.80	\$ 0.40	\$ 1.15	2.7%	6.2%
Motorcycles	\$ 9.60	\$ 12.00	\$ 9.95	\$ 12.95	\$ 0.35	\$ 0.95	3.6%	7.9%
3-wheel vehicle	\$ 11.25	\$ 14.10	\$ 11.65	\$ 15.15	\$ 0.40	\$ 1.05	3.6%	7.4%
Oversize:								
Over 21' to under 30'	\$ 36.05	\$ 45.10	\$ 37.30	\$ 48.50	\$ 1.25	\$ 3.40	3.5%	7.5%
30' to under 40''	\$ 57.40	\$ 71.85	\$ 59.40	\$ 77.20	\$ 2.00	\$ 5.35	3.5%	7.4%
40' to under 50'	\$ 76.65	\$ 95.80	\$ 79.35	\$103.15	\$ 2.70	\$ 7.35	3.5%	7.7%
50' to under 60'	\$ 95.80	\$119.75	\$ 99.15	\$128.90	\$ 3.35	\$ 9.15	3.5%	7.6%
60' to under 70'	\$114.95	\$143.70	\$118.95	\$154.65	\$ 4.00	\$10.95	3.5%	7.6%
70' to under 80'	\$140.85	\$176.10	\$145.80	\$189.55	\$ 4.95	\$13.45	3.5%	7.6%
80' to under 90'	\$166.75	\$208.50	\$172.60	\$224.40	\$ 5.85	\$15.90	3.5%	7.6%
Over 90'	\$197.25	\$246.50	\$204.15	\$265.40	\$ 6.90	\$18.90	3.5%	7.7%

Service Improvement Plan: It would be desirable to implement the short term service enhancements as soon as possible, since they address current needs. There will be discussion with the Executive and Council regarding budget priorities and potential funding options for adding these new services.

Funding Implications: The preliminary proposed fare structure changes are estimated to generate net positive revenue beyond the base 3% increase assumed for the 2016 budget.

- The total cost of near-term service enhancements are greater than the fare revenue benefits
- Incremental revenue from potential new ridership attracted by the new service is an unknown
- Funding may need to come from additional fare revenue
- A key funding issue is how to prioritize proposed service changes
- Productivity of new services will be evaluated and adjustments made to balance overall service efficiency and effectiveness

Fare Proposal Impacts	\$20,000
Summer Surcharge	\$20,000
Vehicle/Passenger Ratio	\$5,000
Youth Discount	(\$5,000)

Service Cost Increments	\$215,000	B/E trips per day
New morning run	\$95,000	20
New evening run	\$60,000	21
Summer 2-boat service	\$40,000	109
New Ketron departure	\$20,000	21

Current Schedule

Steilacoom Departure	Ketron Island Departure	Anderson Island Departure	Ketron Island Departure
5:45 AM	--	6:15 AM	--
6:45 AM	6:55 AM	7:30 AM	--
8:00 AM	--	8:30 AM	--
9:00 AM	--	9:30 AM	--
10:00 AM	10:10 AM	10:30 AM	--
12:00 PM	--	12:30 PM	12:55 PM
2:10 PM	--	2:40 PM	--
3:10 PM	--	3:40 PM	--
4:10 PM	--	4:40 PM	--
5:10 PM	--	5:40 PM	6:00 PM
6:30 PM	--	7:00 PM	--
7:30 PM	--	8:00 PM	--
8:40 PM	--	9:10 PM	9:30 PM
10:00 PM	--	10:30 PM	10:50 PM
11:00 PM	--	11:30 PM	11:50 PM

- Monday-Saturday only
- No Service 1st and 3rd Wednesday, Ketron service only on 1st and 3rd Tuesday
- Thursday, Friday, Saturday and Sunday only , Ketron departures on Thursday and Sunday only
- Saturdays, Fridays only Labor Day-June 30, and July 3, Christmas Eve, New Year's Eve only if Mon-Fri
- Fridays only July 1-Labor Day and No Service Saturday

Extended Day Schedule

Steilacoom Departure	Ketron Island Departure	Anderson Island Departure	Ketron Island Departure
4:45 AM	--	5:15 AM	--
5:45 AM	--	6:15 AM	--
6:45 AM	6:55 AM	7:30 AM	--
8:00 AM	--	8:30 AM	--
9:00 AM	--	9:30 AM	--
10:00 AM	10:10 AM	10:30 AM	--
12:00 PM	--	12:30 PM	12:55 PM
2:10 PM	--	2:40 PM	--
3:10 PM	--	3:40 PM	--
4:10 PM	--	4:40 PM	--
5:10 PM	--	5:40 PM	6:00 PM
6:30 PM	--	7:00 PM	--
7:30 PM	--	8:00 PM	--
8:40 PM	--	9:10 PM	9:30 PM
10:00 PM	--	10:30 PM	10:50 PM
11:00 PM	--	11:30 PM	11:50 PM

- Monday-Friday only
- Monday-Saturday only
- Ketron departures on Thursday and Sunday only
- No Service 1st and 3rd Wednesday, Ketron service only on 1st and 3rd Tuesday
- Saturdays, Fridays only Labor Day-June 30, and July 3, Christmas Eve, New Year's Eve only if Mon-Fri
- Fridays only July 1-Labor Day and No Service Saturday

Note: Service changes have budget implications, so ultimate decisions about timing will depend on funding availability

Summer 2-Boat Schedule With Extended Day

Steilacoom Departure	Ketron Island Departure	Anderson Island Departure	Ketron Island Departure
4:45 AM	--	5:15 AM	--
5:45 AM	--	6:15 AM	--
6:45 AM	6:55 AM	7:30 AM	--
8:00 AM	--	8:30 AM	--
9:00 AM	--	9:30 AM	--
10:00 AM	10:10 AM	10:30 AM	--
12:00 PM	--	12:30 PM	12:55 PM
1:40 PM	--	2:10 PM	--
2:10 PM	--	2:40 PM	--
2:40 PM	--	3:10 PM	--
3:10 PM	--	3:40 PM	--
3:40 PM	--	4:10 PM	--
4:10 PM	--	4:40 PM	--
4:40 PM	--	5:10 PM	--
5:10 PM	--	5:40 PM	6:00 PM
5:40 PM	--	6:10 PM	--
6:30 PM	--	7:00 PM	--
7:00 PM	--	7:30 PM	--
7:30 PM	--	8:00 PM	--
8:00 PM	--	8:30 PM	--
8:40 PM	--	9:10 PM	9:30 PM
10:00 PM	--	10:30 PM	10:50 PM
11:00 PM	--	11:50 PM	11:50 PM

- Monday-Friday only
- Monday-Saturday only
- No Service 1st and 3rd Wednesday, Ketron service only on 1st and 3rd Tuesday
- Friday and Sunday only
- Ketron departures on Thursday and Sunday only
- Saturdays, Fridays only Labor Day-June 30, and July 3, Christmas Eve, New Year's Eve only if Mon-Fri
- Fridays only July 1-Labor Day and No Service Saturday

Note: Service changes have budget implications, so ultimate decisions about timing will depend on funding availability

Current Schedule

Steilacoom Departure	Ketron Island Departure	Anderson Island Departure	Ketron Island Departure
5:45 AM	--	6:15 AM	--
6:45 AM	6:55 AM	7:30 AM	--
8:00 AM	--	8:30 AM	--
9:00 AM	--	9:30 AM	--
10:00 AM	10:10 AM	10:30 AM	--
12:00 PM	--	12:30 PM	12:55 PM
2:10 PM	--	2:40 PM	--
3:10 PM	--	3:40 PM	--
4:10 PM	--	4:40 PM	--
5:10 PM	--	5:40 PM	6:00 PM
6:30 PM	--	7:00 PM	--
7:30 PM	--	8:00 PM	--
8:40 PM	--	9:10 PM	9:30 PM
10:00 PM	--	10:30 PM	10:50 PM
11:00 PM	--	11:30 PM	11:50 PM

- Monday-Saturday only
- No Service 1st and 3rd Wednesday, Ketron service only on 1st and 3rd Tuesday
- Thursday, Friday, Saturday and Sunday only , Ketron departures on Thursday and Sunday only
- Saturdays, Fridays only Labor Day-June 30, and July 3, Christmas Eve, New Year's Eve only if Mon-Fri
- Fridays only July 1-Labor Day and No Service Saturday

Extended with Schedule With additional Ketron Departure (Tuesdays only)

Steilacoom Departure	Ketron Island Departure	Anderson Island Departure	Ketron Island Departure
4:45 AM	--	5:15 AM	--
5:45 AM	--	6:15 AM	--
6:45 AM	6:55 AM	7:30 AM	--
8:00 AM	--	8:30 AM	--
9:00 AM	--	9:30 AM	--
10:00 AM	10:10 AM	10:30 AM	--
12:00 PM	--	12:30 PM	12:55 PM
1:45 PM	--	2:15 PM	--
2:45 PM	--	3:15 PM	3:40 PM
4:10 PM	--	4:40 PM	--
5:10 PM	--	5:40 PM	6:00 PM
6:30 PM	--	7:00 PM	--
7:30 PM	--	8:00 PM	--
8:40 PM	--	9:10 PM	9:30 PM
10:00 PM	--	10:30 PM	10:50 PM
11:00 PM	--	11:30 PM	11:50 PM

- Monday-Friday only
- Monday-Saturday only
- No Service 1st and 3rd Wednesday, Ketron service only on 1st and 3rd Tuesday
- Tuesdays only
- Saturdays, Fridays only Labor Day-June 30, and July 3, Christmas Eve, New Year's Eve only if Mon-Fri
- Ketron departures on Thursday and Sunday only
- Fridays only July 1-Labor Day and No Service Saturday

Note: Service changes have budget implications, so ultimate decisions about timing will depend on funding availability