



market decisions
CORPORATION

General Market Assessment

Part of the WSTC Ferry Research Initiative



Washington State
Transportation Commission

Conducted by
Market Decisions Corporation
April-May 2010



Methodology

- ❖ The following report presents the findings to the general market assessment research. The main objectives of this research are to understand:
 - How are the ferries utilized by greater Puget Sound residents?
 - Last route taken, purpose for trips, how frequently travelled, etc.
 - How has utilization changed since 2008?
 - What factors contributed to the changes and how can they be reversed by WSF?
 - How important do Puget Sound residents think WSF is as a contributor to the overall economy and recreation/tourism in the region?
 - What are Puget Sound residents understanding of WSF operational and capital funding?

- ❖ Respondents were screened to meet the following criteria:
 - Live in one of the target counties/areas (King, Vashon Island, Snohomish, Pierce, Clallam, Island, Jefferson, Kitsap, San Juan, or Skagit).

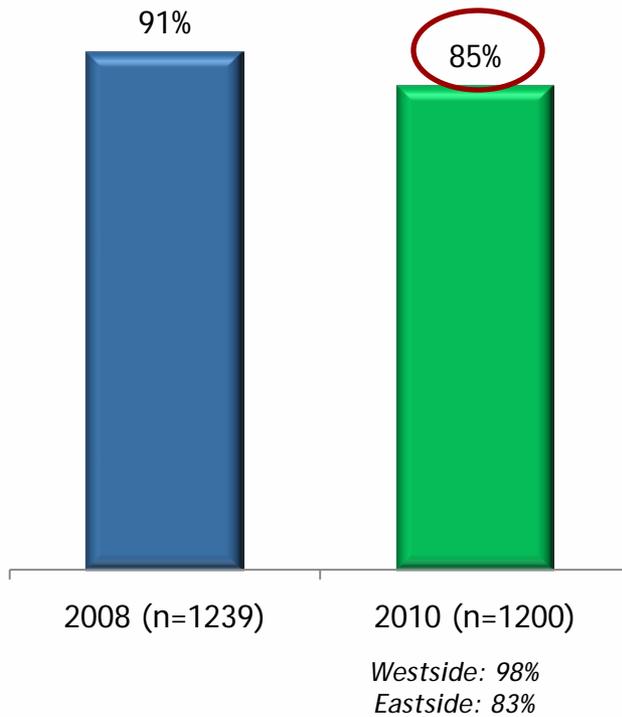
- ❖ A total of 1,200 telephone interviews were conducted with a random sample of Puget Sound residents between 05/12/2010 and 05/15/2010.
 - A sample of 1,200 yields a maximum sampling variability of +/- 2.8% at the 95% confidence level.

- ❖ Throughout the report these terms are used to define the following customer segments:
 - Puget Sound residents refers to the total sample
 - East side communities are: King, Snohomish, Skagit, Pierce
 - West side communities are: Kitsap, Clallam, Island, Jefferson



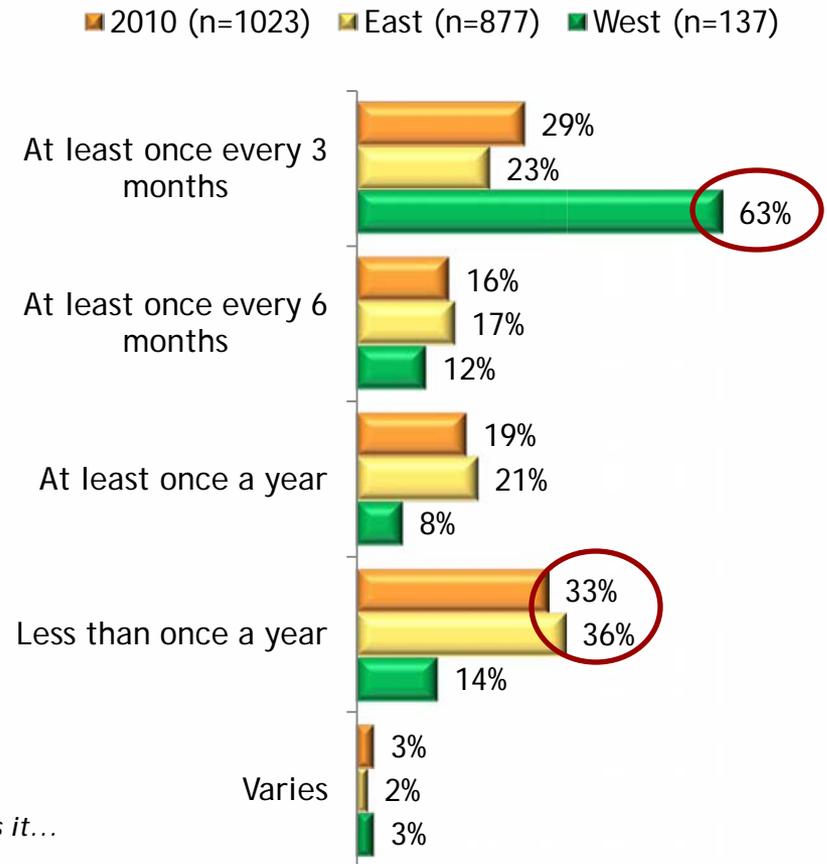
Ferry Ridership

Ferry Ridership



F1 Have you ever ridden a Washington State Ferry?
F2 When was the last time you rode a Washington State Ferry? Was it...

Travel Frequency





Routes Utilized

	2010 (n=1203)		East (n=877)		West (n=137)	
	Total	Most	Total	Most	Total	Most
SEA/BAIN	31%	11%	27%	9%	54%	25%
SEA/BREM	36%	13%	35%	10%	44%	30%
PTD/TAH	6%	1%	6%	1%	4%	1%
EDM/KIN	36%	20%	33%	20%	54%	20%
FAU/VAS	14%	3%	15%	3%	7%	1%
FAU/SOU	7%	2%	6%	2%	11%	6%
SOU/VAS	7%	2%	7%	2%	6%	1%
PTT/KEY	14%	3%	13%	2%	27%	5%
MUK/CLI	21%	8%	22%	9%	13%	6%
ANA/SJI	21%	9%	23%	10%	9%	<1%
Inter SJI	7%	1%	7%	1%	6%	0%
Other	12%	3%	12%	3%	8%	1%

F3B What other Washington State Ferries routes, if any, have you taken?

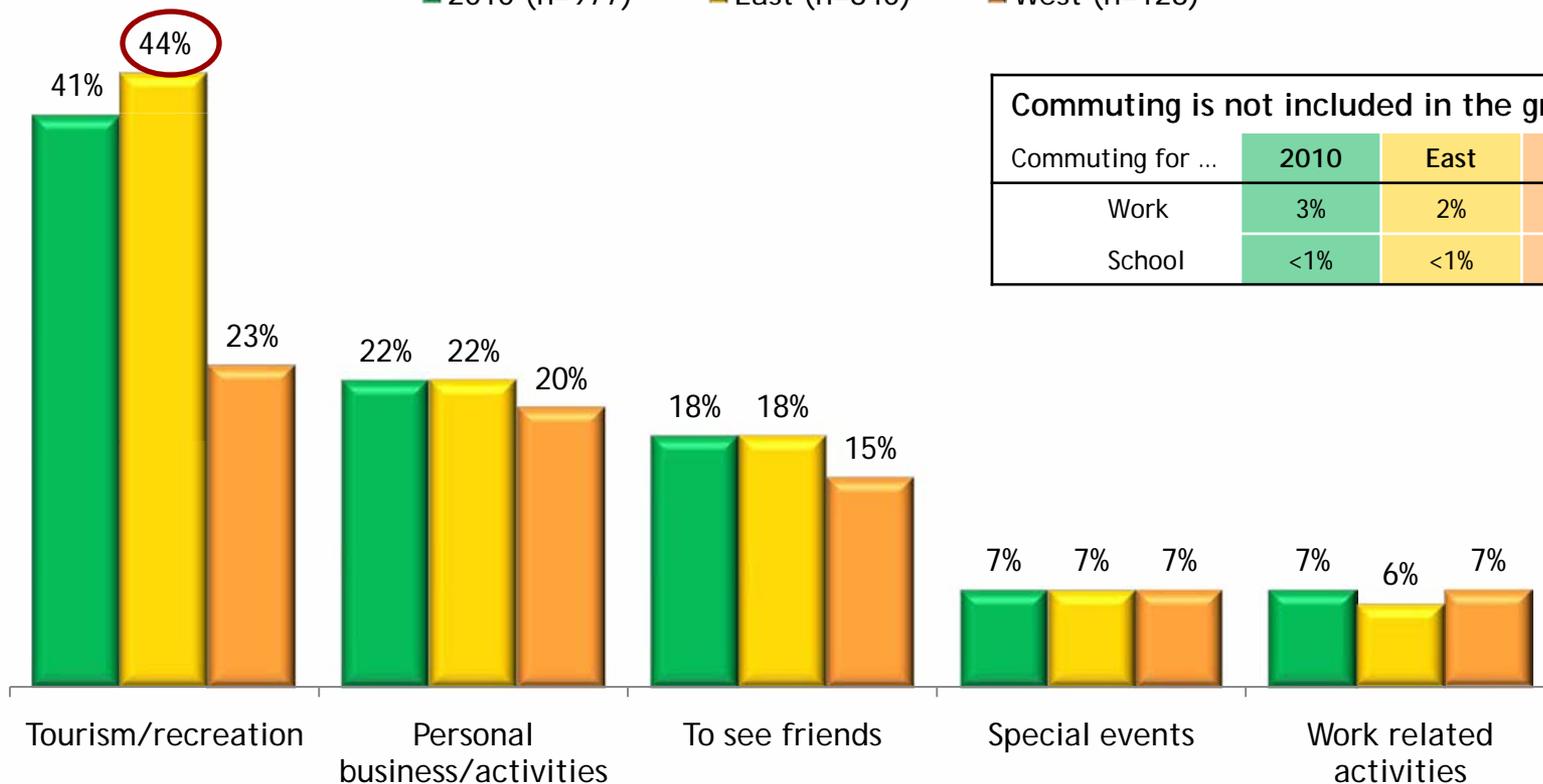
F3C What Washington State Ferry route do you take most often?



Trip Purposes

Most Frequently Mentioned Trip Purpose

■ 2010 (n=977) ■ East (n=840) ■ West (n=128)



Commuting is not included in the graph.

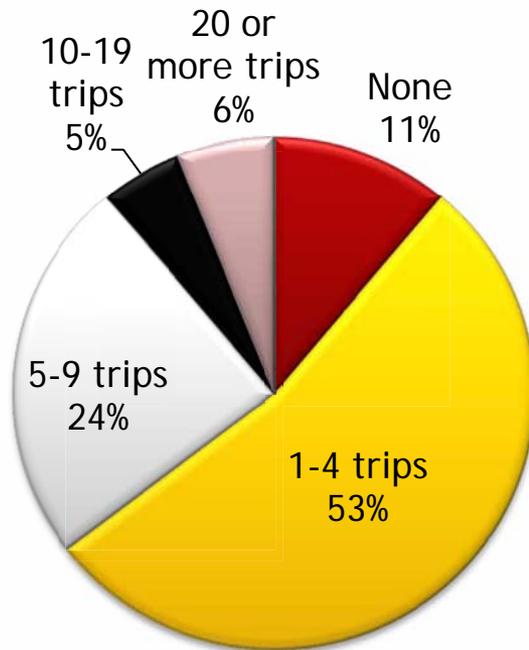
Commuting for ...	2010	East	West
Work	3%	2%	9%
School	<1%	<1%	2%

F4 You said your last ferry ride was on the [INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?
NEW1 For what other purposes do you take any Washington State Ferries?



Travel Behavior - Monthly Riders

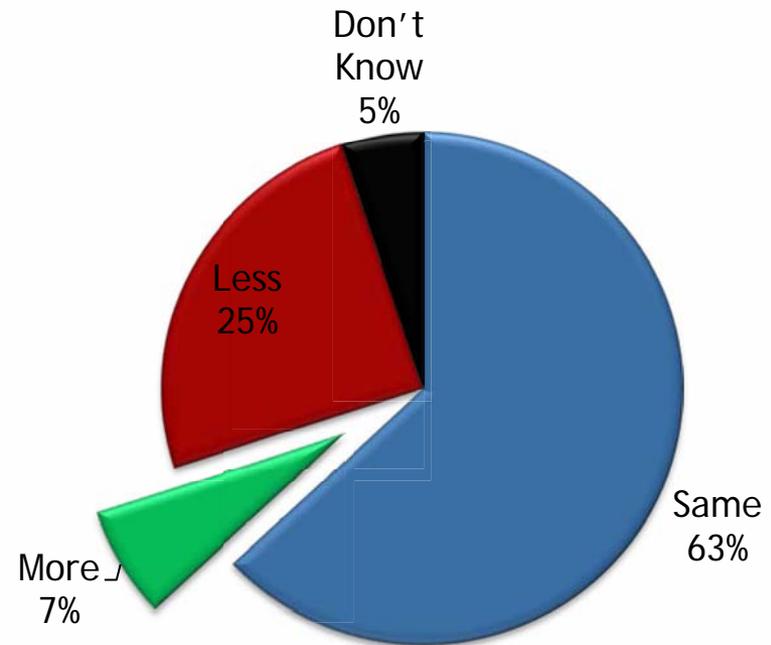
Number of 1-way Trips Taken in Past 30 Days



(n=137)

Travelled at least once in the past 30 days)

Seasonal Changes in Travel Behavior *Winter Compared to Summer*



(n=137)

Travelled at least once in the past 30 days)

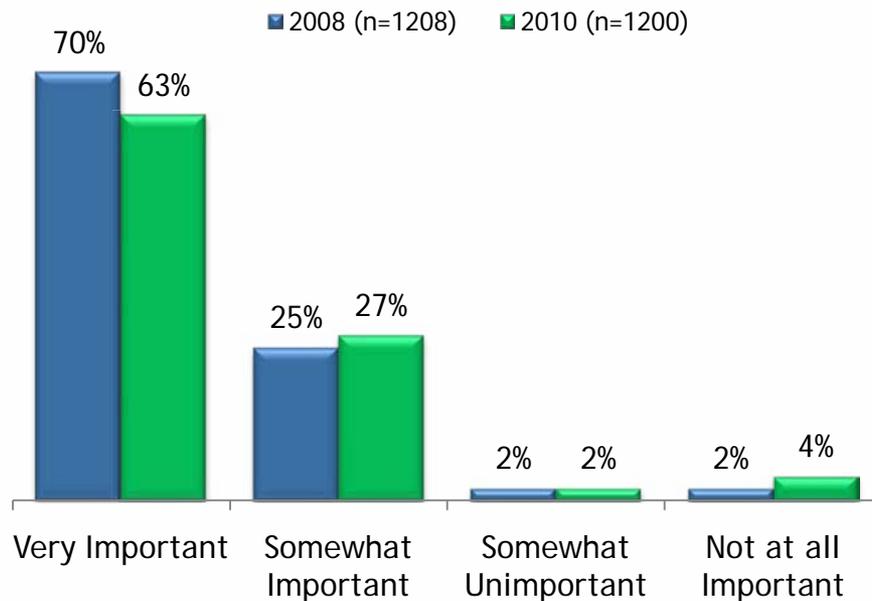
F3B2 [F3A < 3] In the last 30 days (month of April), approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two one way trips.

NEW2 Do you make approximately the same number of trips in the October through April period as you do in the May through September period?

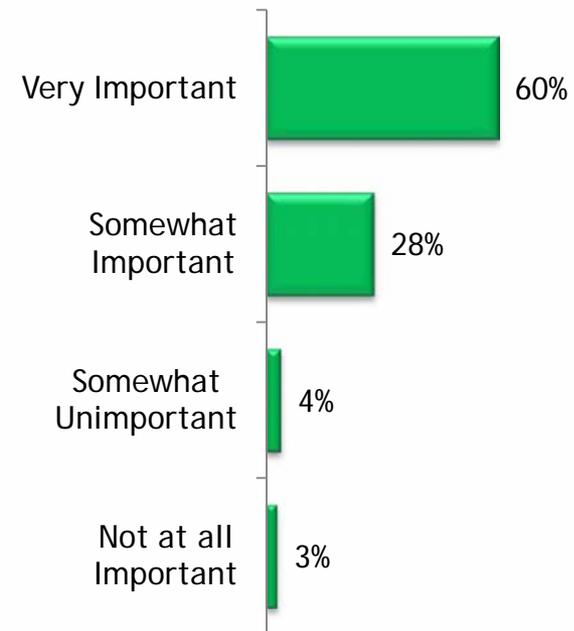


Importance of WSF to the Region

Importance of WSF to Economy and Growth of the Region



Importance of WSF to Encourage Tourism

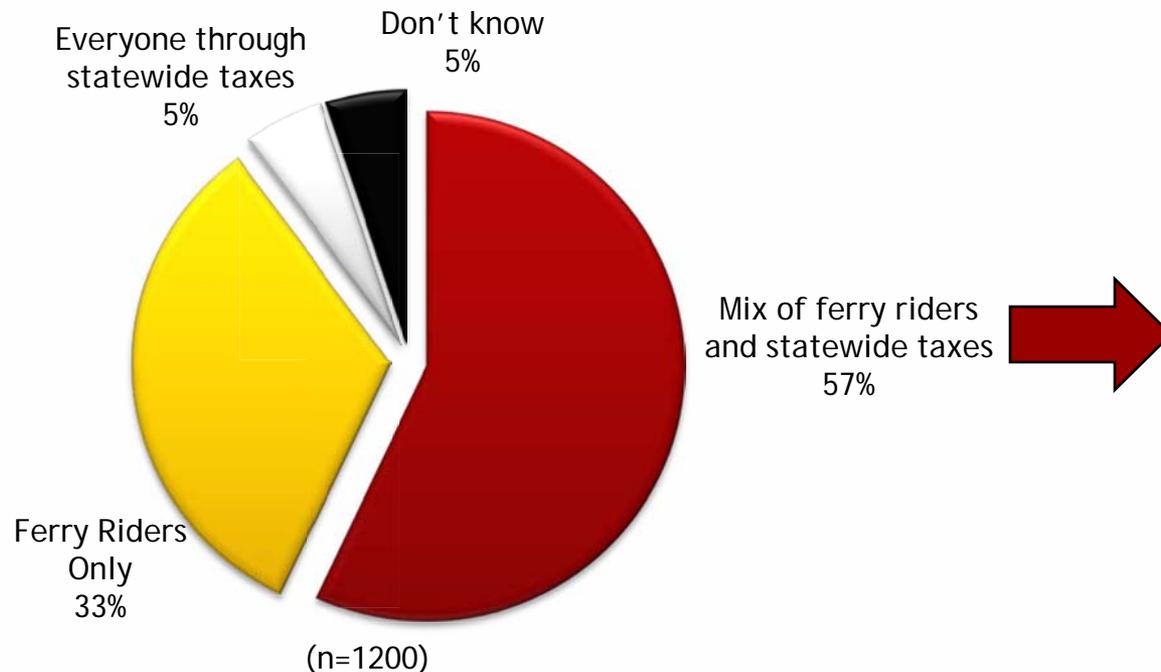


- F7 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the region? Would you say...
- NEW3 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the region? Would you say...



Ferry Funding - Daily Operations

How WSF Daily Operations Should Be Funded



Ferry riders should pay on average 56.6% of WSF's daily operating costs

- Eastside residents report that riders should pay an average of 57.6% vs. 49.2% for Westside residents.

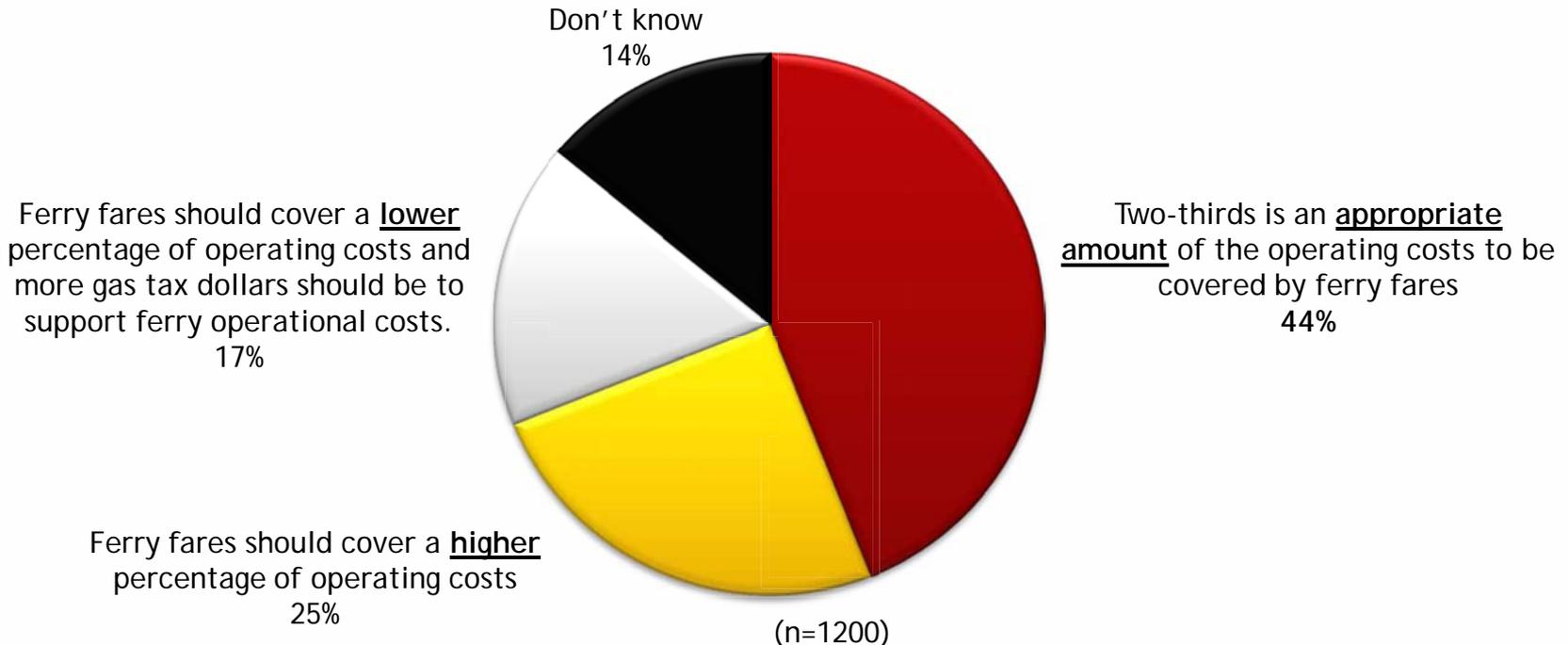
NEW4 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:

NEW5 What percent of the daily operation costs do you feel riders should pay?



Ferry Funding - Annual Operating Expenses

How Much Should Fares Cover of Annual Operating Costs



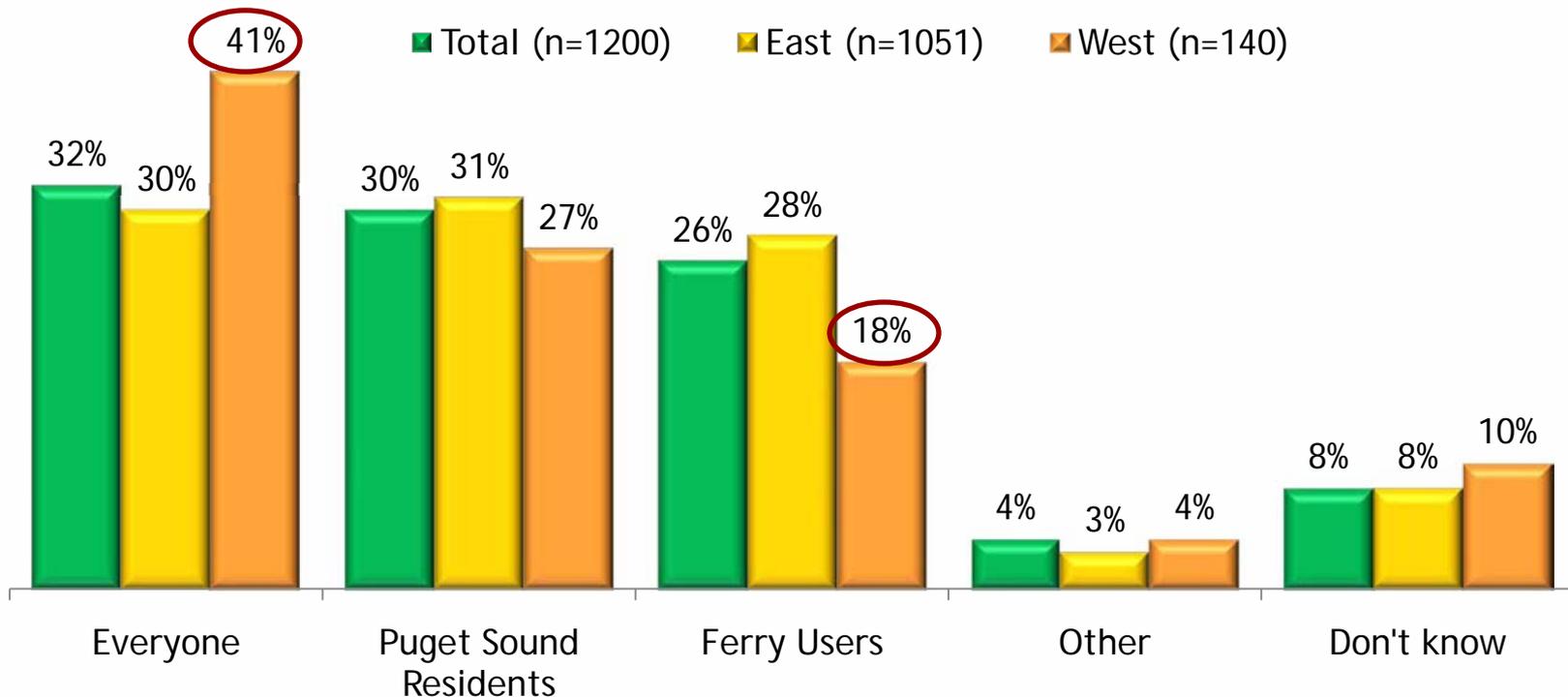
NEW6 What percentage of WSF's annual operational costs do you think fares currently cover?

NEW7 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?



Ferry Funding - Capital Investments

Who should pay for capital investments?



NEWS8 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs to budget for this capital cost through some form of taxes. In your opinion, should the state raise the money for new or replacement ferries and terminals from:



Questions?