



General Market Assessment 2014 Topline Report



**Washington State Transportation
Commission**

Methodology



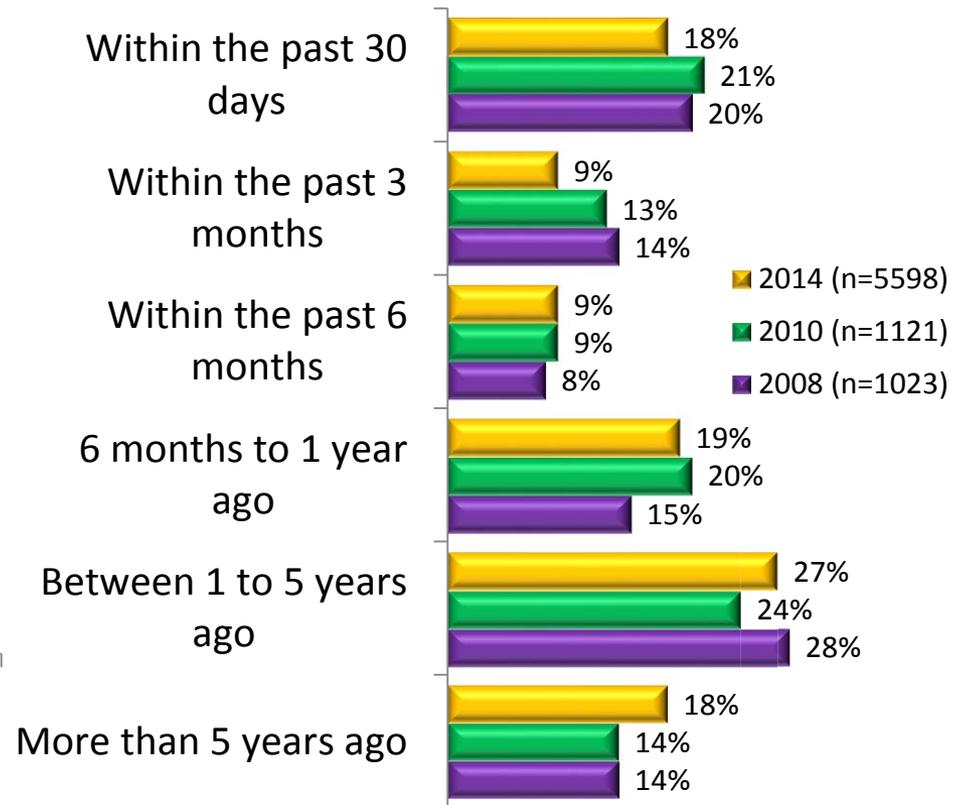
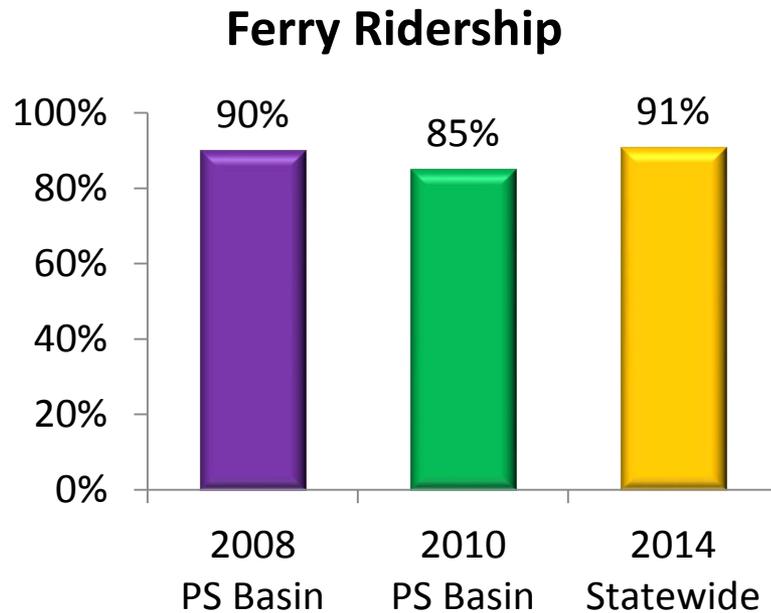
- General WSF Attitude Study
 - Sent to Voice Of Washington State (VOWS) member Statewide
 - Conducted in June 2014
 - 5,637 VOWS members completed the survey
 - Data weighted to reflect both county population within state and citizen's age with each county

Ferry Ridership



- Approximately 9 in 10 state residents have ridden a WSF at some point in their lives.
 - 2014 Puget Sound (PS) basin resident ridership is 95% compared to non-Puget Sound basin of 81%.

Last trip on WSF



Q1 Have you ever ridden a Washington State Ferry?

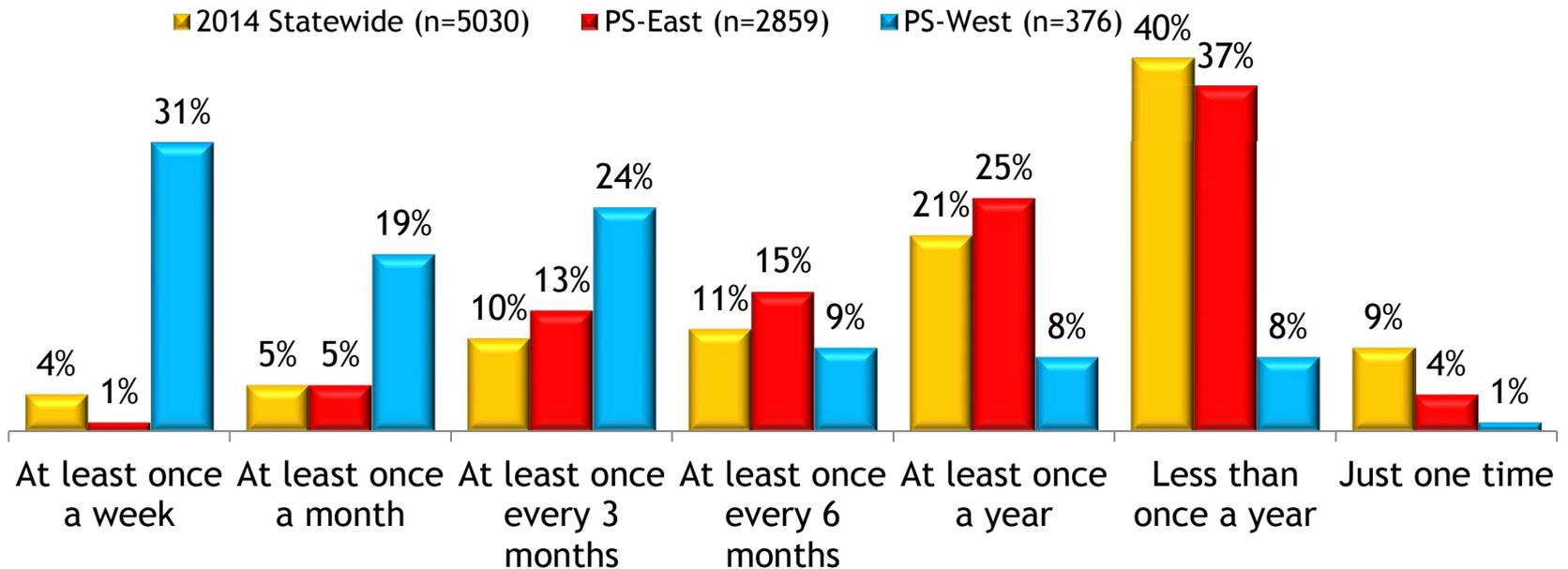
Q3 When was the last time you rode a Washington State Ferry? Was it...

Overall Travel Frequency



- ❖ Residents living in Westside communities in the Puget Sound basin have a higher travel frequency than residents living in Puget Sound basin Eastside communities and Statewide.

Travel Frequency

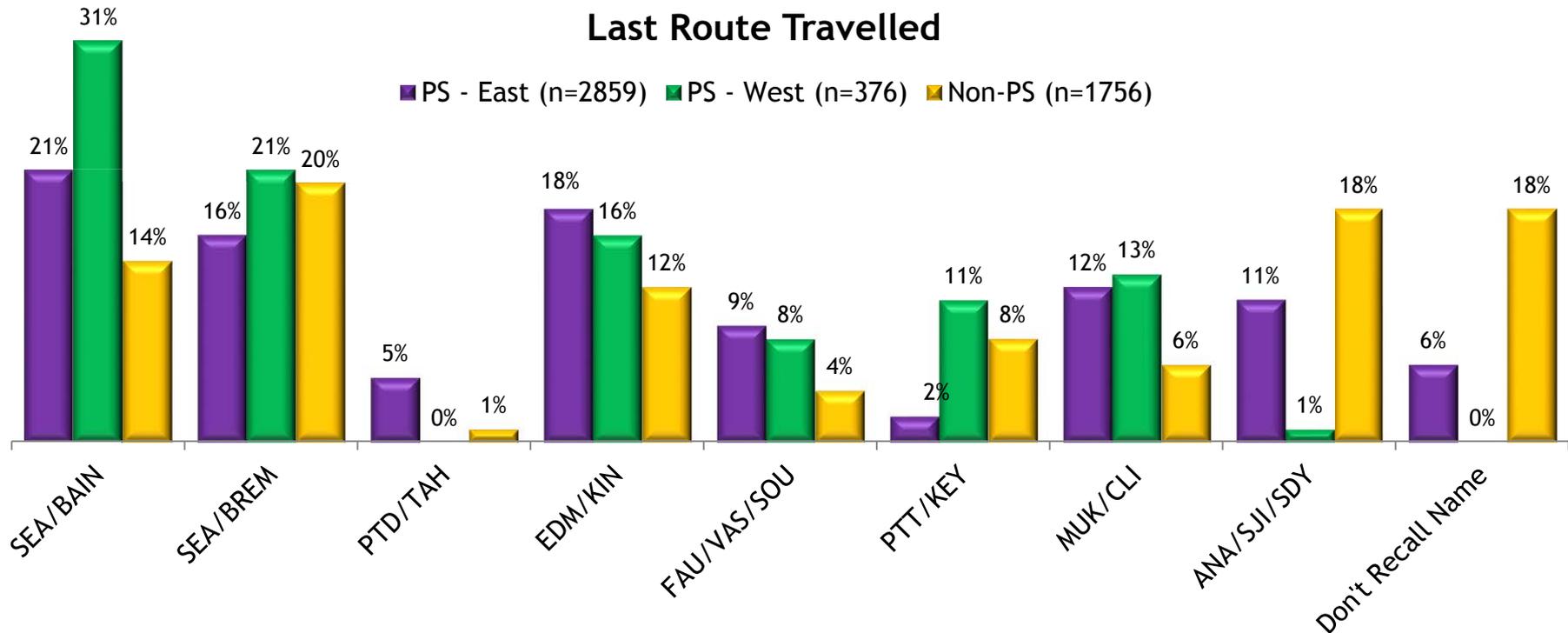


Q8 How often do you ride Washington State Ferries?

Last Route Travelled



- ❖ Residents in Westside Puget Sound basin communities tend to use Seattle - Bainbridge and Port Townsend more than their Eastside counterparts. Non-Puget Sound basin residents use Anacortes more often than their Puget Sound counterparts.



Q3 What was the last Washington State Ferry route that you took?

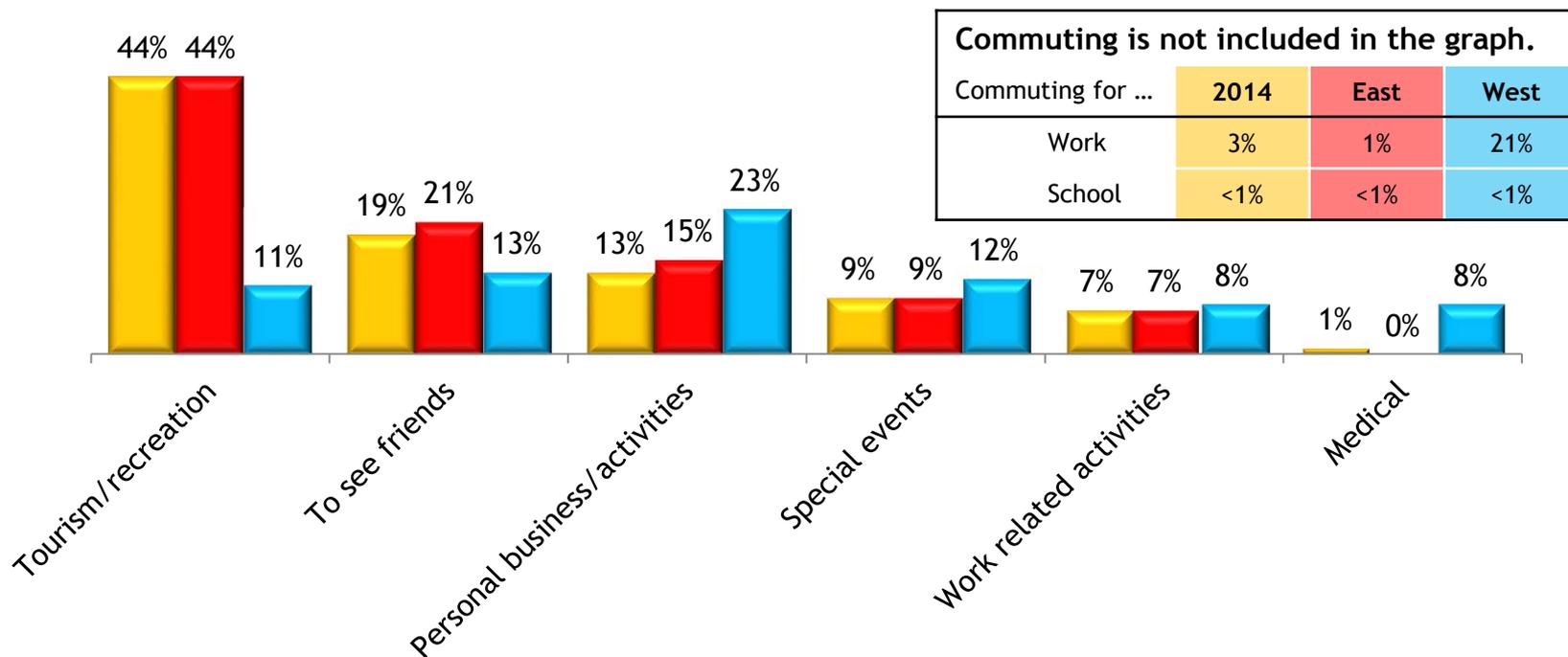
Trip Purposes



- ❖ Statewide and Puget Sound basin Eastside residents use the ferries more for tourism/recreation and to see friends while those living on the Westside use the ferries for work and personal business/activities more.

Most Frequently Mentioned Trip Purpose

■ 2014 Statewide (n=5029) ■ PS-East (n=2859) ■ PS-West (n=376)



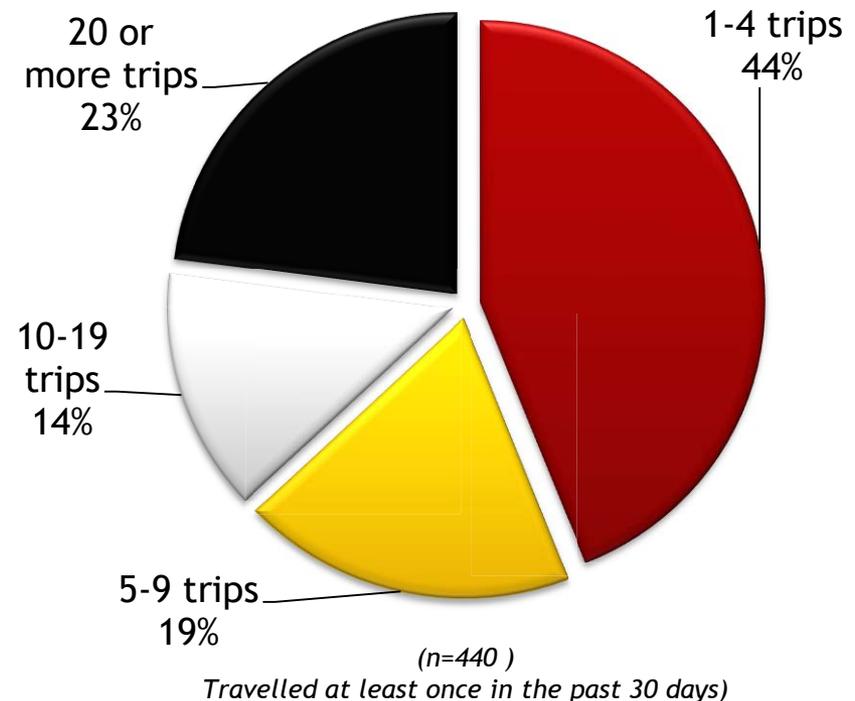
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM F3A] ferry. What was your primary purpose for that particular trip?

Travel Behavior – Monthly Riders



- ❖ Puget Sound basin residents who ride at least once a month have taken an average of 12.6 trips in the past 30 days.
 - Eastside residents are taking significantly fewer trips than Westside residents (6.3 vs. 17.9, respectively).

Number of 1-way Trips Taken in Past 30 Days



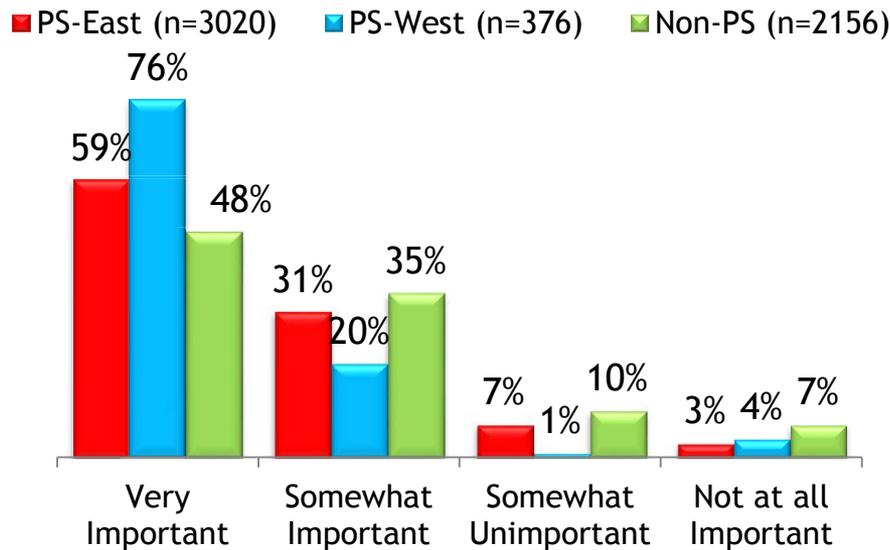
Q9 In the last 30 days, approximately how many one-way trips did you take on Washington State Ferries? If you took a round-trip, count that as two one way trips.

Importance of WSF to Puget Sound

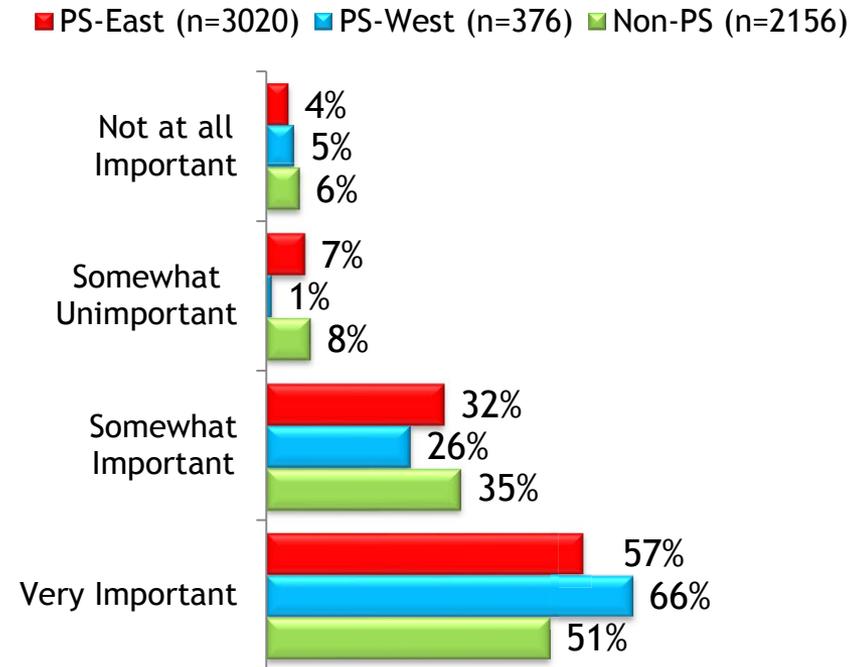


- ❖ The perceived importance of WSF to the general Puget Sound economy, growth and tourism is over 80% statewide.

Importance of WSF to Economy and Growth of the PS Region



Importance of WSF to Encouraging Tourism in PS



Q15F7 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...

Q16 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 Operations Funding

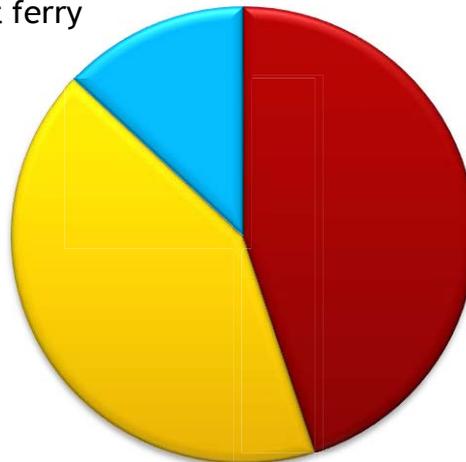


- ❖ On average, Puget Sound residents think that fares cover 53% of WSF's annual operating expenses (Eastside 54% vs. 49% Westside vs. 54% Non-PS regions).
- ❖ Almost half (45%) think that it is appropriate that ferry fares cover 2/3 of operating expenses.

How Much Should Fares Cover of Annual Operating Costs

Ferry fares should cover a lower percentage of operating costs and more gas tax dollars should be to support ferry operational costs.
13%

Ferry fares should cover a higher percentage of operating costs
42%



Two-thirds is an appropriate amount of the operating costs to be covered by ferry fares
45%

(n=5598)

Q19 What percentage of WSF's annual operational costs do you think fares currently cover?

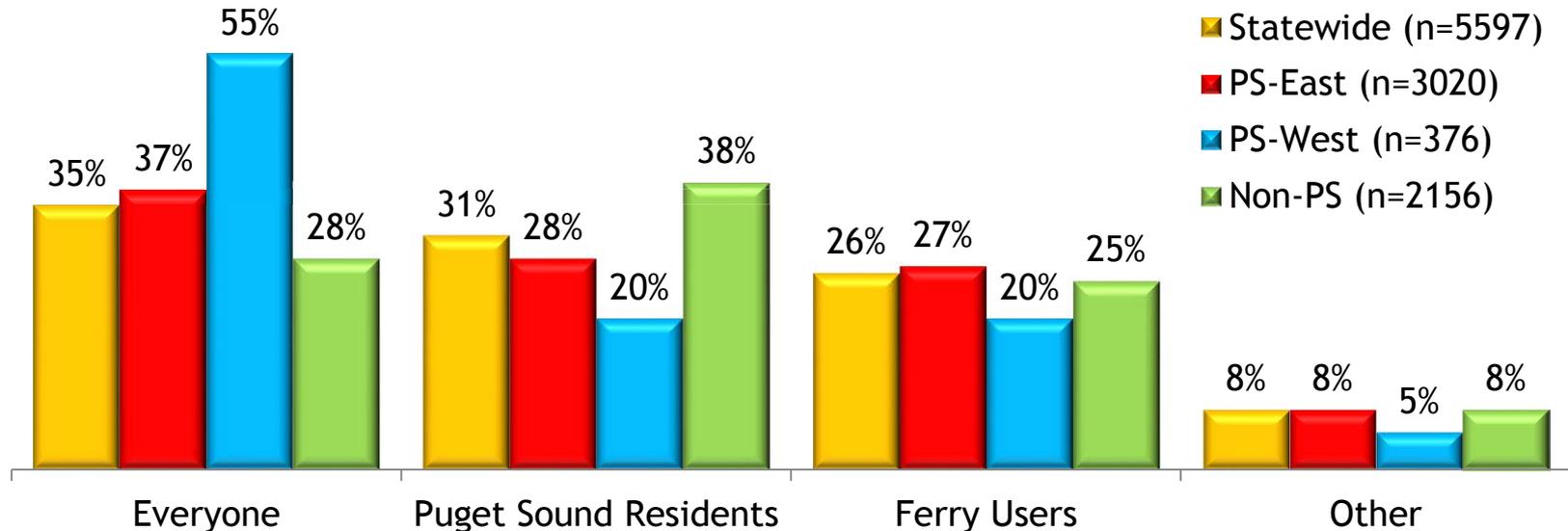
Q20 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

Ferry Capital Funding



- ❖ Residents are divided in roughly thirds when it comes to who should pay for capital investments.
 - Westside residents are significantly more likely to say “everybody” should pay and they are less likely to want “ferry users” to pay compared to Eastside and non-Puget Sound Basin residents.

Who should pay for capital investments?



Q21 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?