



# Voice of Washington State (VOWS) Survey Panel **June 2016 General Market Assessment of WSF**

Presentation to the Washington State Transportation Commission  
July 19, 2016

# Methodology



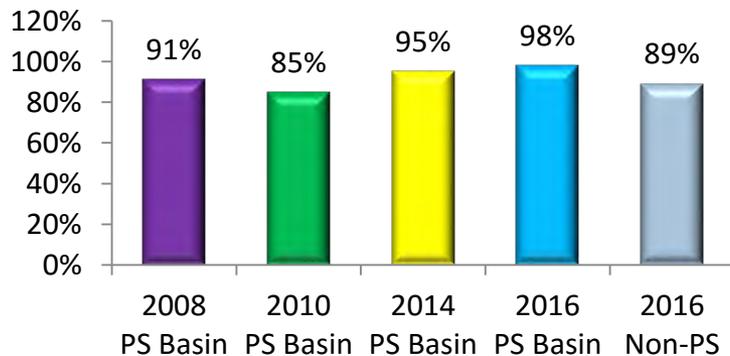
- ❖ The main **objectives** of this research are to understand:
  - **How are the ferries utilized** by three distinct groups: Residents living in: 1) Eastside of Puget Sound, 2) Westside of Puget Sound and 3) Residents living in Non Puget Sound areas?
  - **How important do residents think WSF is as a contributor to the overall economy and recreation/tourism** in the Puget Sound region?
  - What are **residents feelings towards who should pay** for WSF operational and capital costs?
  
- ❖ The study was conducted between June 3, 2016 and June 19, 2016 via the Voice of Washington State (VOWS) online panel **representing residents from across all of Washington**. A total of 6,332 online interviews were conducted.
  
- ❖ Throughout the report these terms are used to define the following segments.
  - **Statewide** refers to the total sample
  - **Puget Sound (PS)** refers to the sample of counties boarding the Puget Sound
  - **East side communities (PS-East)** are: King, Snohomish, Skagit, Pierce, etc. on the east side of Puget Sound
  - **West side communities (PS-West)** are: Kitsap, Clallam, Island, Jefferson, etc. on the west side of Puget Sound
  - **Non-Puget Sound communities (non-PS)** are all counties not bordering the Puget Sound

# Ferry Ridership – 2008/2016

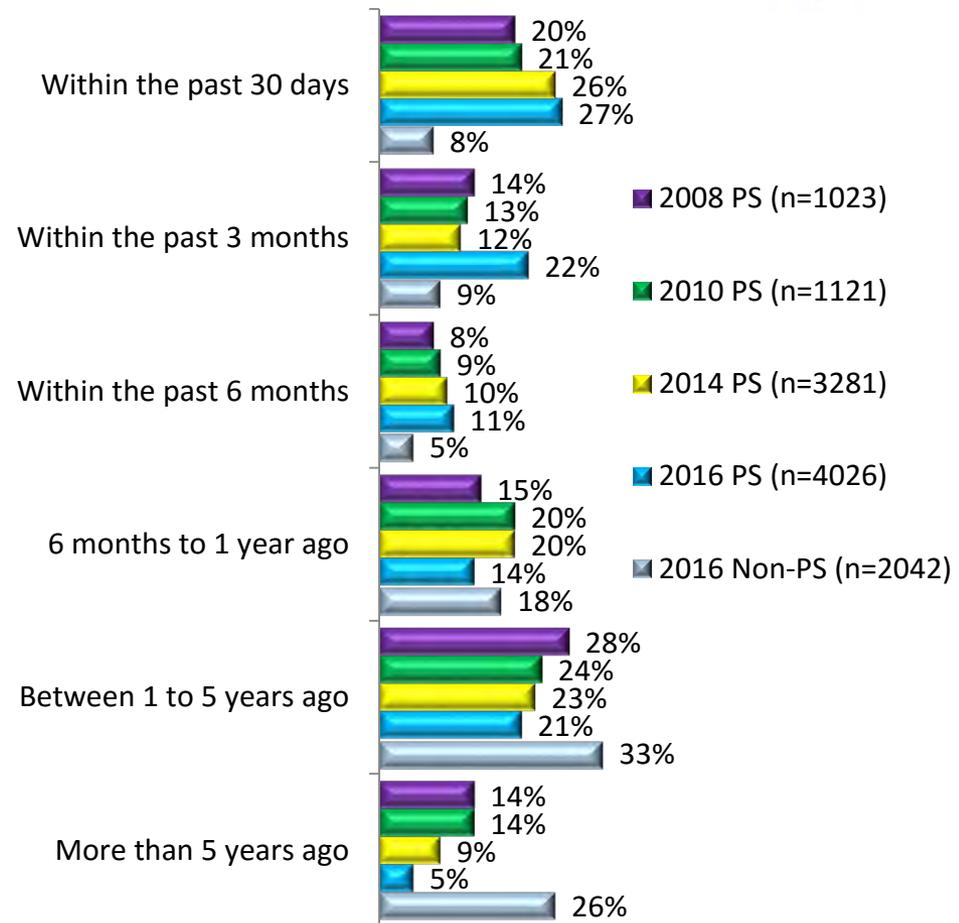


- ❖ Approximately 9 in 10 state residents (95%) in 2016 have ridden a WSF at some point in their lives.
  - ❖ Puget Sound (PS) basin residents “ever” ridership in 2016 is 98% compared to non-Puget Sound (Non-PS) basin of 89%
  - ❖ Timing of the last trip has been consistent since 2008 in the Puget Sound basin where two out of three have used WSF in the last 12 months.

## Ferry Ridership (2008-2016)



## Last trip on WSF (2008-2016)



Q1 Have you ever ridden a Washington State Ferry?

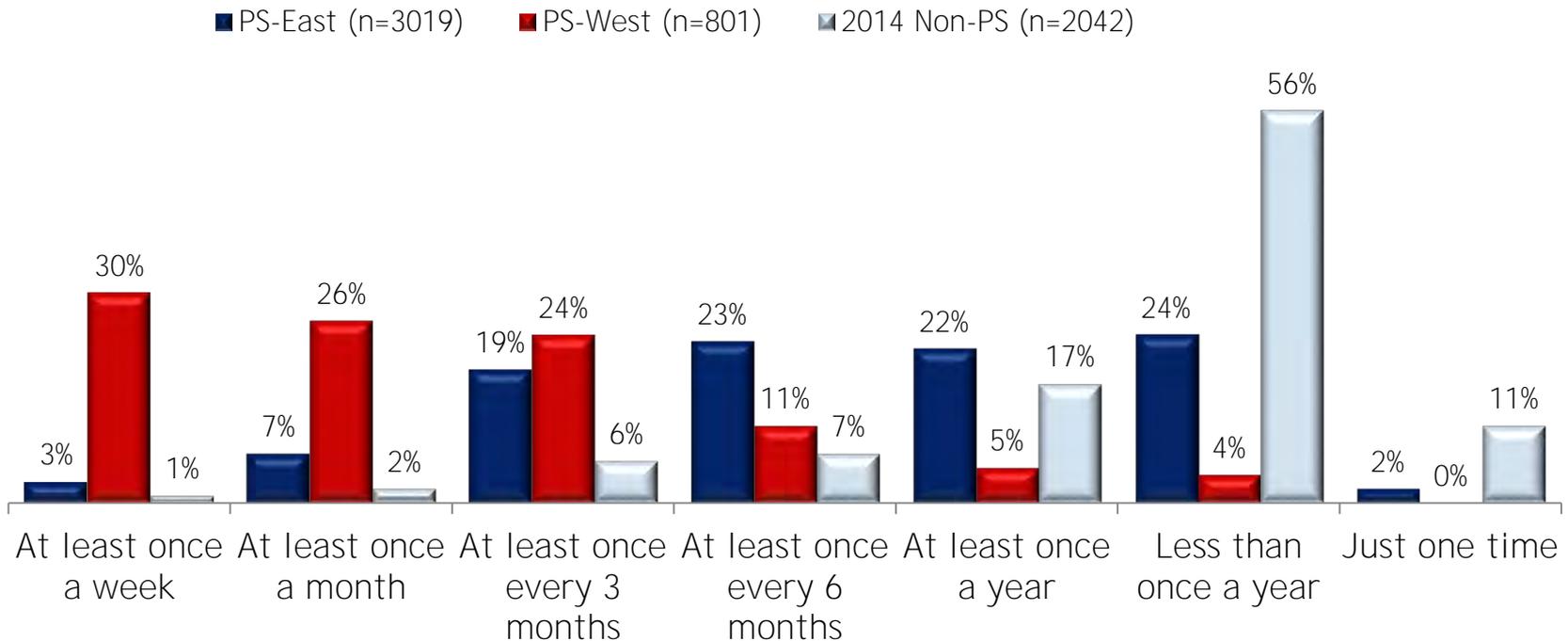
Q3 When was the last time you rode a Washington State Ferry? Was it...

# Travel Frequency – 2016 Overall



- ❖ Residents living in Westside communities in the Puget Sound basin have a higher travel frequency on WSF than residents living in Eastside Puget Sound basin communities or in Non-Puget Sound areas.

## Travel Frequency (2016)



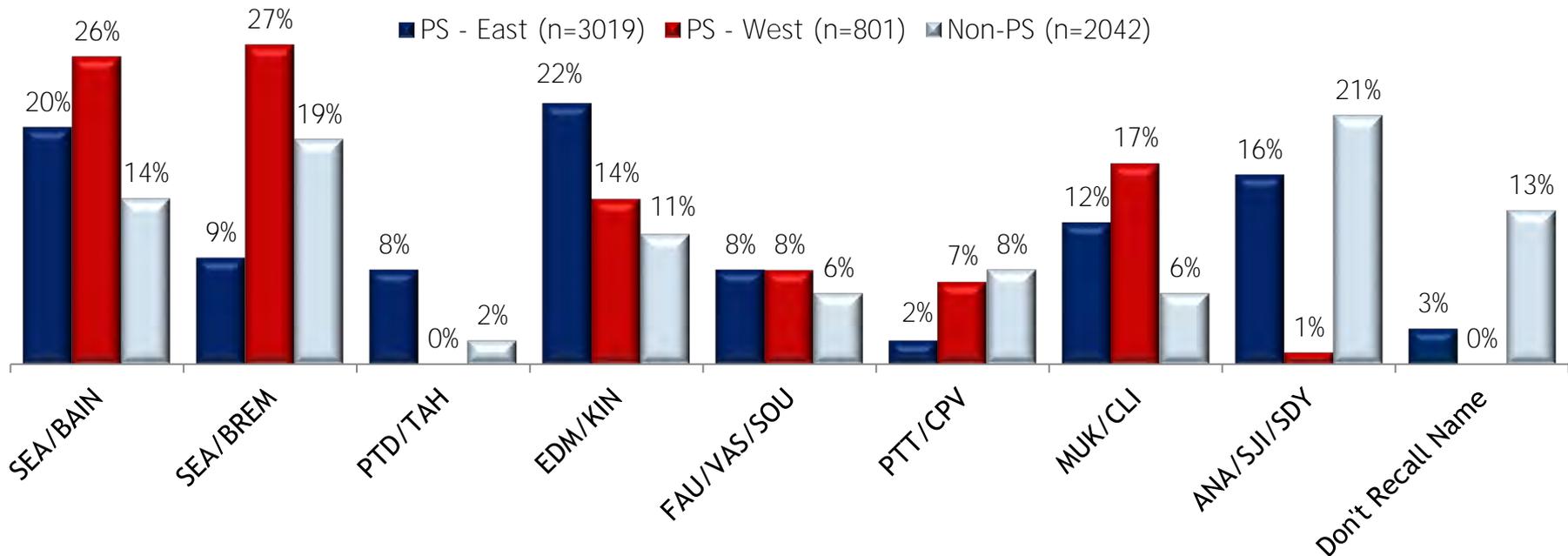
Q8 *Approximately how often do you ride Washington State Ferries?*

# Last Route Travelled - 2016



- ❖ Residents in Westside Puget Sound basin communities tend to use Bremerton (27%), Bainbridge (26%), Mukilteo (17%) and Port Townsend (7%) more than their Eastside PS counterparts (9%, 20%, 12%, 2% respectively).
- ❖ Non-Puget Sound basin residents use Anacortes (21%) more often than their Puget Sound counterparts (16% Eastside, 1% Westside).

Last Route Travelled (2016)



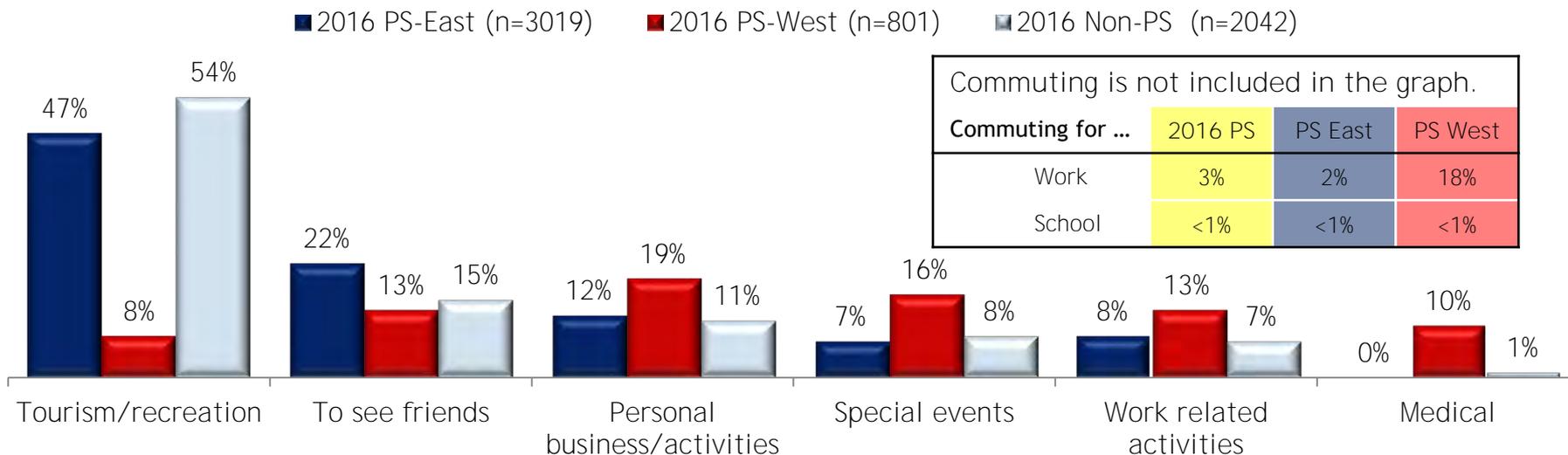
Q4 What was the last Washington State Ferry route that you took?

# Last Trip Purposes - 2016



- ❖ Non-Puget Sound basin residents, like their Puget Sound basin Eastside counterparts, use the ferries more for tourism/recreation (54%, 47%) and to see friends (15%, 22%) than their Westside counterparts (8%, 13% respectively).
- ❖ Those living on the Westside use the ferries for work (18%) and personal business/activities (19%) more so than Puget Sound Eastside (2%, 12%) or Non-Puget Sound (1%, 11%) residents.

## Most Frequently Mentioned Trip Purpose (2016)



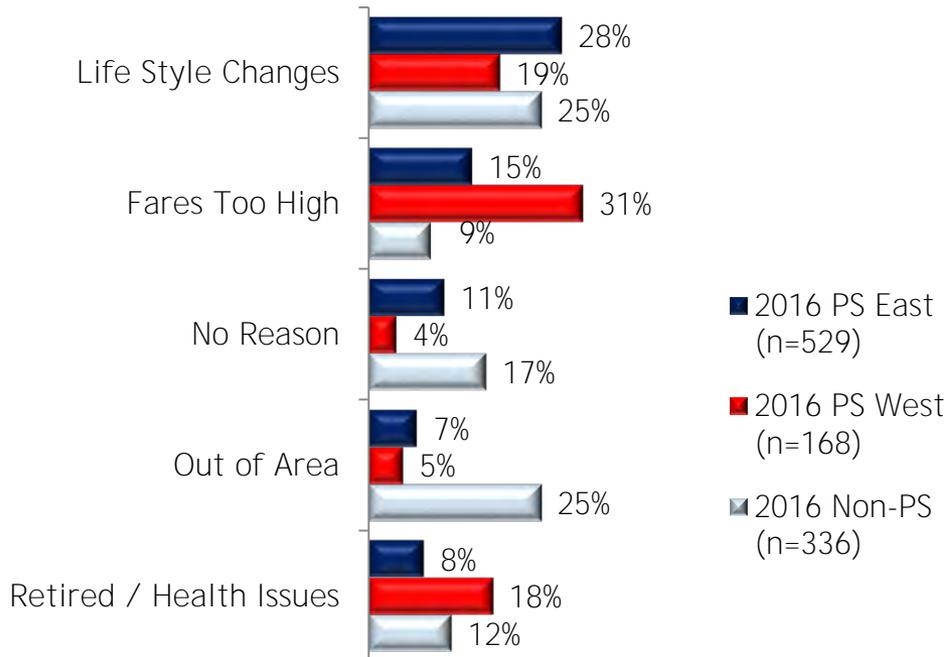
Q6 You said your last ferry ride was on the [INSERT RESPONSE FROM Q3] ferry. What was your primary purpose for that particular trip?

# Reason For Riding Less - 2016



- ❖ Among the 14% (n=1,064) statewide who have decreased their ridership of WSF, the two most frequently mentioned reasons for riding less frequently are: “change in life style” (26%) and “ferry fares are too high” (14%).

## Main Reasons for Riding Less:



- ❖ Among the 10% (n=638) statewide who have stopped riding completely, the main reasons for doing so are:
  - 37% Out of area
  - 33% No Reason / No need
  - 9% Life style changes
  - 9% Fares too high

- ❖ Among the 10% (n=611) statewide who have increased their ridership of WSF, the main reasons for doing so are:
  - 42% Life style changes
  - 32% Recreational outings
  - 13% Work / School changes
  - 10% Retirement

Q11 What is the primary reason you are riding Washington State Ferries less often?

Q12 What is the primary reason you have stopped riding Washington State Ferries completely?

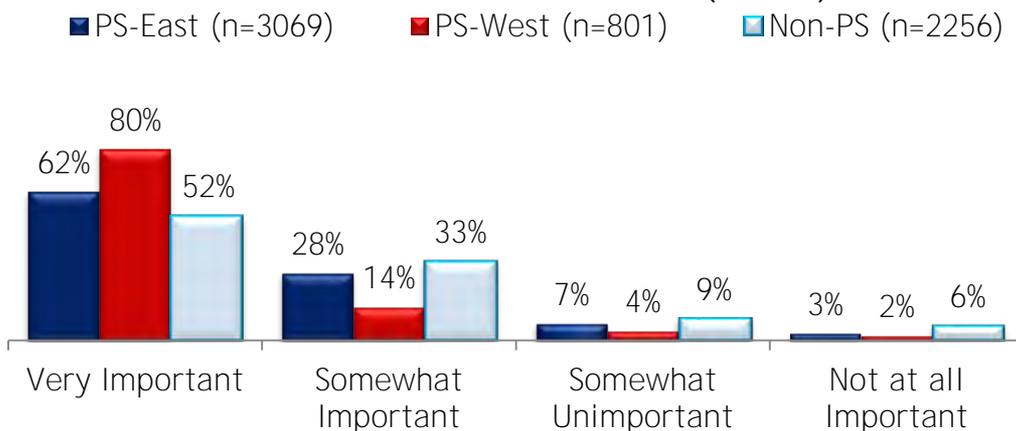
Q13 What would you say are the primary reasons that you are riding WSF more often?

# WSF Importance - 2016

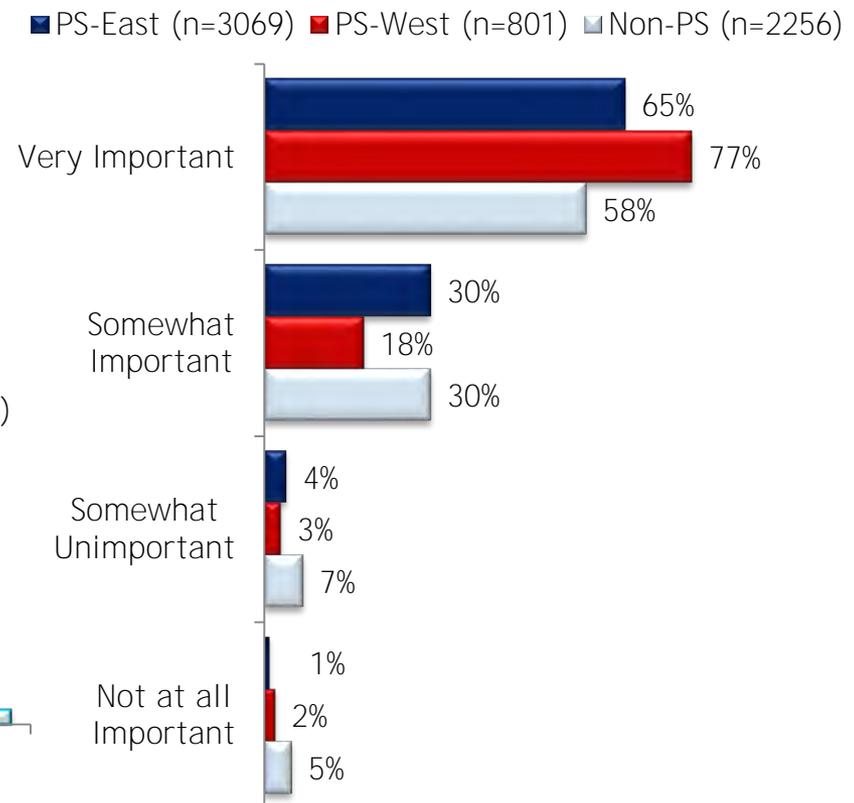


- ❖ About nine in ten citizens statewide perceive WSF to be important to the general Puget Sound economy/growth (88%) and PS tourism (92%).
- ❖ The perceived economic importance of WSF is only 5 percentage points higher in PS-East (90%) than Non-PS (85%).

Importance of WSF to Economy and Growth of the PS Basin (2016)



Importance of WSF to Encouraging Tourism in PS Basin (2016)



Q15 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 Puget Sound region? Would you say...

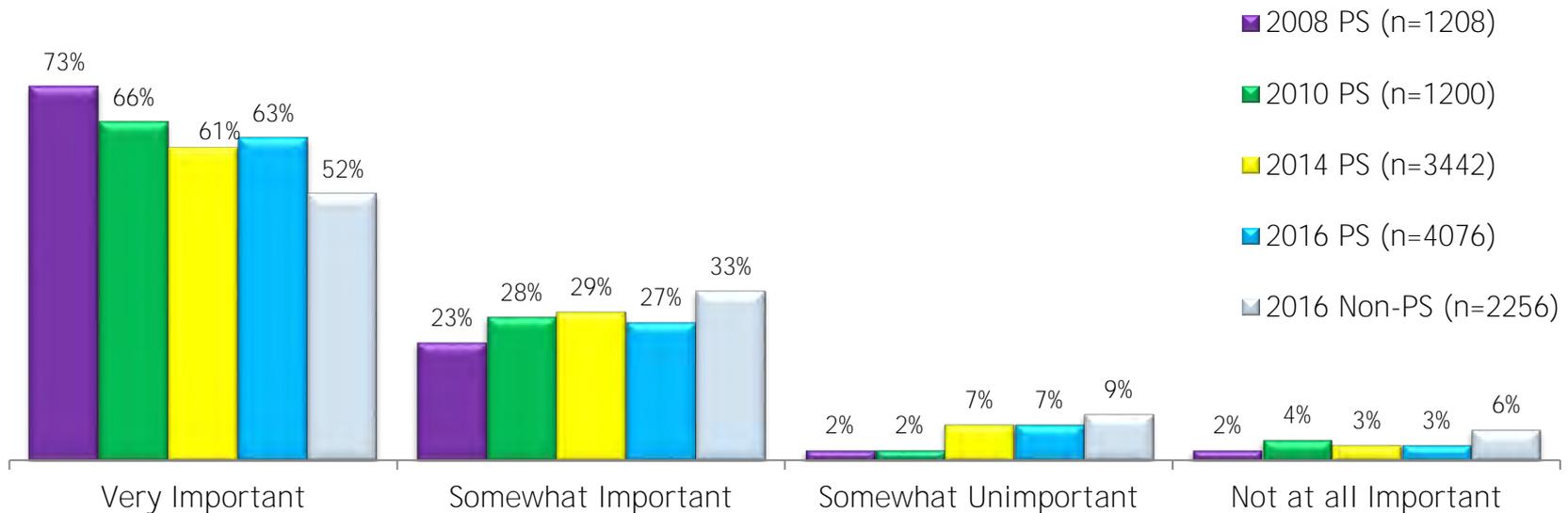
Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

# WSF Importance – 2008/16



- ❖ The perceived importance of WSF to the Puget Sound Economy for all PS residents has declined slightly from 2008 (96% important) to 2016 (90%).
- ❖ Eight out of ten Non-PS residents say WSF is important to the economy of PS (85%).

Importance of WSF to PS Regional Economy and Growth (2008-2016)



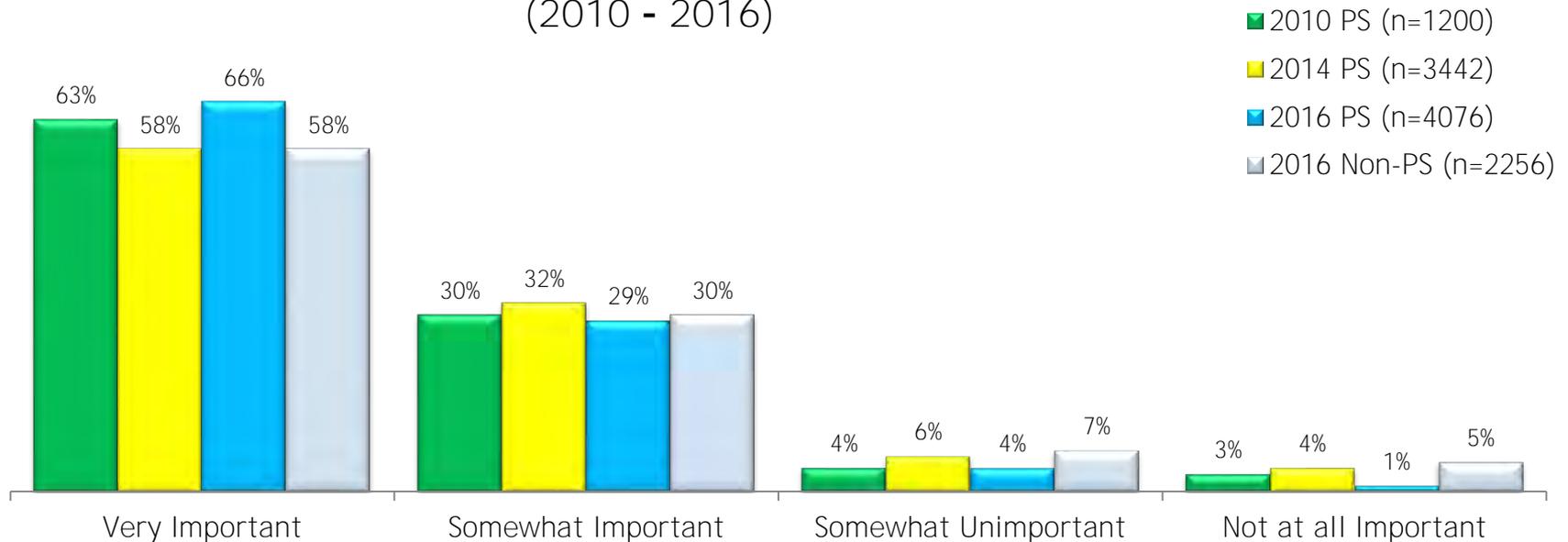
Q15 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to the general economy and growth of the Puget Sound region? Would you say...

# WSF Importance – 2008/16



- ❖ The perceived importance of WSF to Puget Sound tourism for all PS residents has remained the same from 2008 (96%) to 2016 (95%).
- ❖ Eight out of ten Non-PS residents say WSF is important to encouraging PS tourism (88%).

Importance of WSF to Encouraging PS Regional Tourism  
(2010 - 2016)



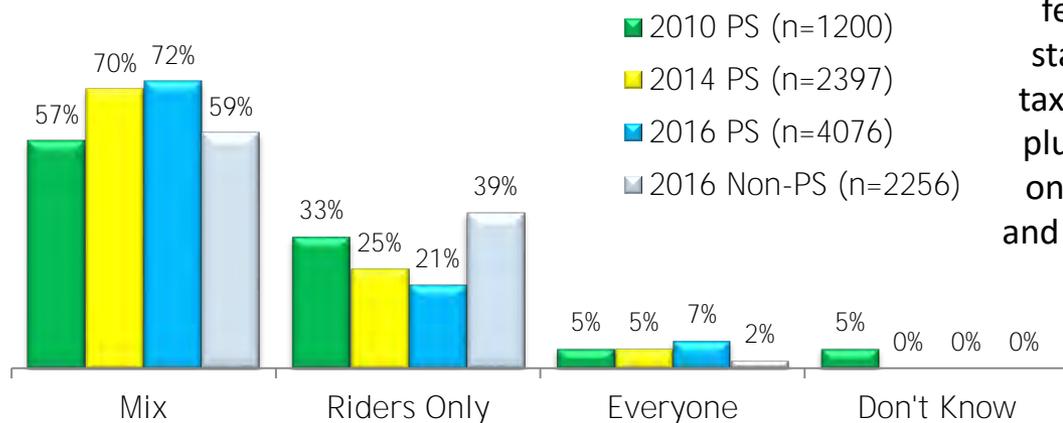
Q16 Based on what you know, have read, or experienced, in your opinion, how important are Washington State Ferries to encouraging tourism in the Puget Sound region? Would you say...

# Operations Funding – 2010/16



- ❖ About the same percent of PS riders in 2016 (72%) as in 2014 (70%) feel that daily operations should be paid for by a mix of rider’s fares and gas taxes.
- ❖ Non-PS residents in 2016 are more likely (39%) to say “riders only” should pay the daily operation costs than their Puget Sound counterparts (21%).
- ❖ Statewide, about seven in ten (67%) say daily operations should be paid for by a mix (riders and everyone) and the rider portion of costs should be 61.2%.

How WSF Daily Operations Should Be Funded (2010 - 2016)



**Statewide**  
 Mix of rider fees and statewide taxes (67%) plus Riders only (28%) and Everyone (5%)



In 2016 citizens statewide suggested ferry riders should pay on average 61.2% of WSF’s daily operating costs (56.7% PS, 68.4% Non-PS)

- Puget Sound Eastside residents report that riders should pay an average of 57.7%
- In comparison PS Westside residents said 47.3%, while Island dependent residents said 33.3%.

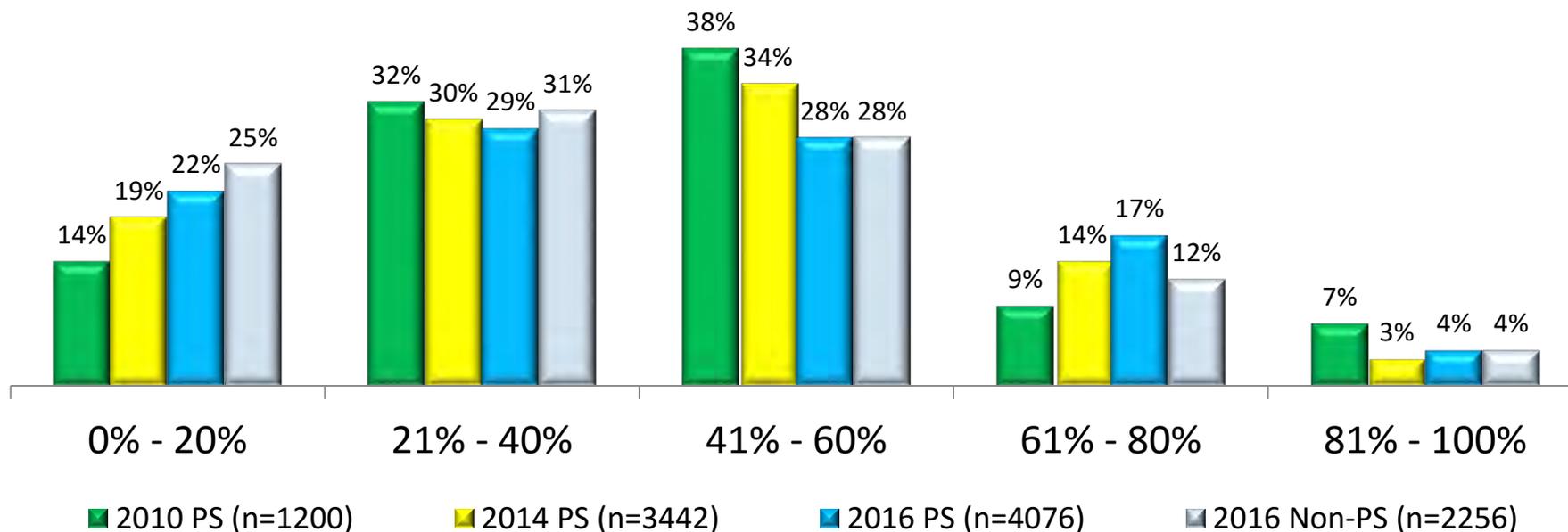
- Q17 Which of the following three ways to pay for the daily operations of the ferry system do you support the most? Do you believe that the cost of daily operations should be covered by:
- Q18 What percent of the daily operation costs do you feel riders should pay?

# Operations Funding – 2010/16



- ❖ On average, 2016 Puget Sound residents think that fares cover 42.4% of WSF's annual operating expenses (Eastside 41.8% vs. 47.9% Westside vs. 39.9% Non-PS regions).
- ❖ The average perception of how much fares cover has changed little between 2010 and 2016 within the Puget Sound basin.

## How Much Do Fares Cover of Annual Operating Costs (2010-2016)



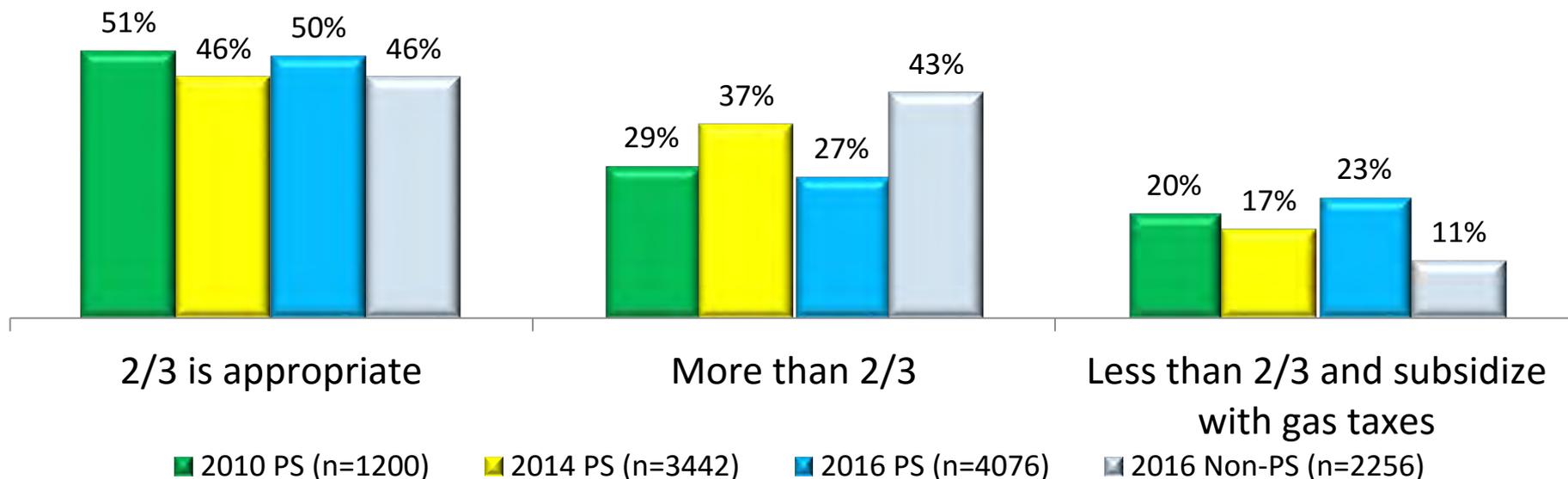
Q19 What percentage of WSF's annual operational costs do you think fares currently cover?

# Fare Coverage – 2010/16



- ❖ Over four in ten (43%) Non-Puget Sound residents feel riders should pay more than 2/3 of the daily operating costs.
- ❖ More Puget Sound residents in 2016 (23%) feel riders should pay less than 2/3 of the daily operating costs than did in 2010 (17%).

## How Much Should Fares Cover of Annual Operating Costs (2010-2016)



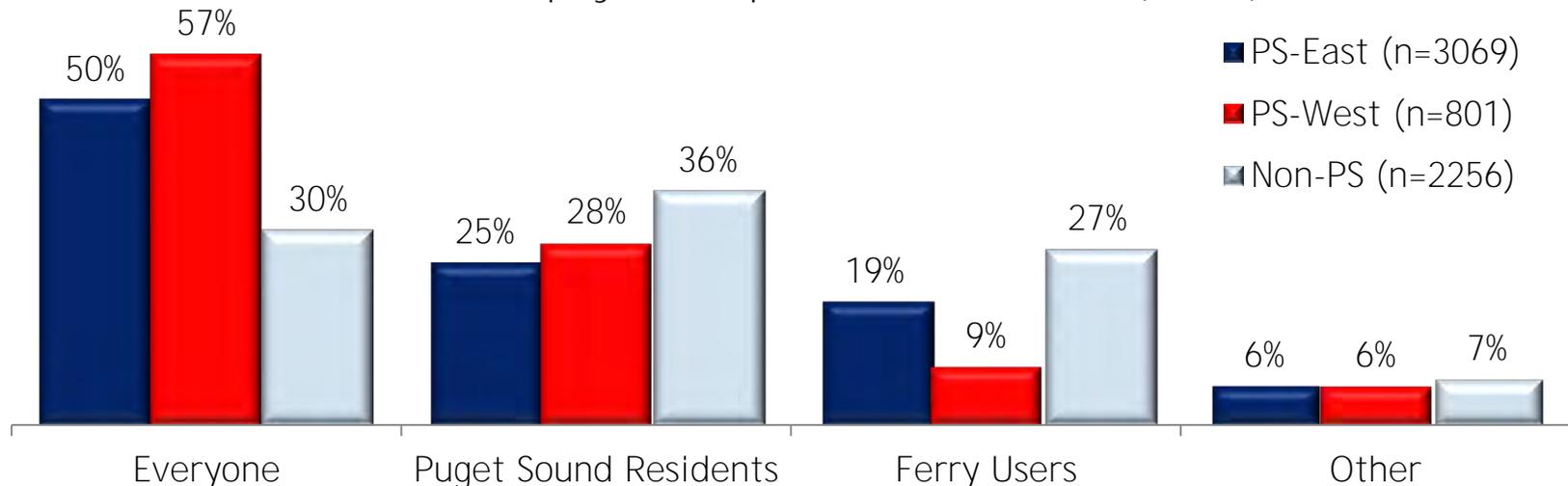
Q20 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

# Capital Funding - 2016



- ❖ Non-Puget Sound residents are divided roughly in thirds when it comes to who should pay for capital investments (Everyone – 30%, PS Residents – 36%, Ferry Riders – 27%) but lean towards PS residents paying.
- ❖ Westside residents are significantly more likely to say “everybody” should pay for capital improvements (57%) compared to Eastside (50%) and non-Puget Sound Basin (30%) residents.

Who should pay for capital investments? (2016)



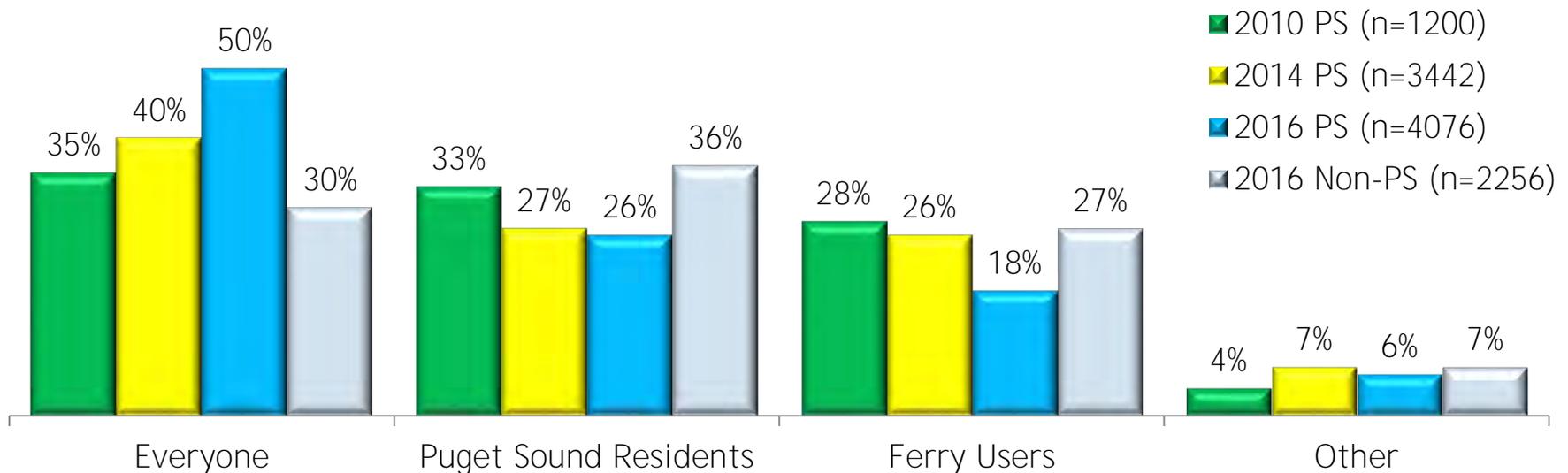
Q21 Daily ferry operations are one cost, and they are covered about two-thirds by ferry fares and one-third by state gas tax subsidies. But there is also a cost to build new or replacement ferries and terminals as the fleet ages or to add new boats as the population of Washington grows. The state needs 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:

# Capital Funding – 2010/16



- ❖ In 2016, Non-Puget Sound residents are more likely to say “Puget Sound Residents” should pay for capital investments (36%) than their PS counterparts in either 2016 (26%) or 2014 (27%).

Who should pay for capital investments? 2010-2016



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 & Answers



**THANK YOU!**

**For More Information Contact:**

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