

# WSDOT Ferries Division: Ridership and Fares Trends Briefing

Rick Singer, Director, Finance and Administration  
Washington State Transportation Commission Meeting  
March 15, 2022

# Agenda

- Ridership trends so far this biennium
- Historic trends and shifts in patterns
  - Frequent riders
  - Full fare
  - Other discounted fares
- Changes during the pandemic
- Fare revenue impacts for this biennium
- February Forecasts

## 2019 – Changing trends *before* the pandemic

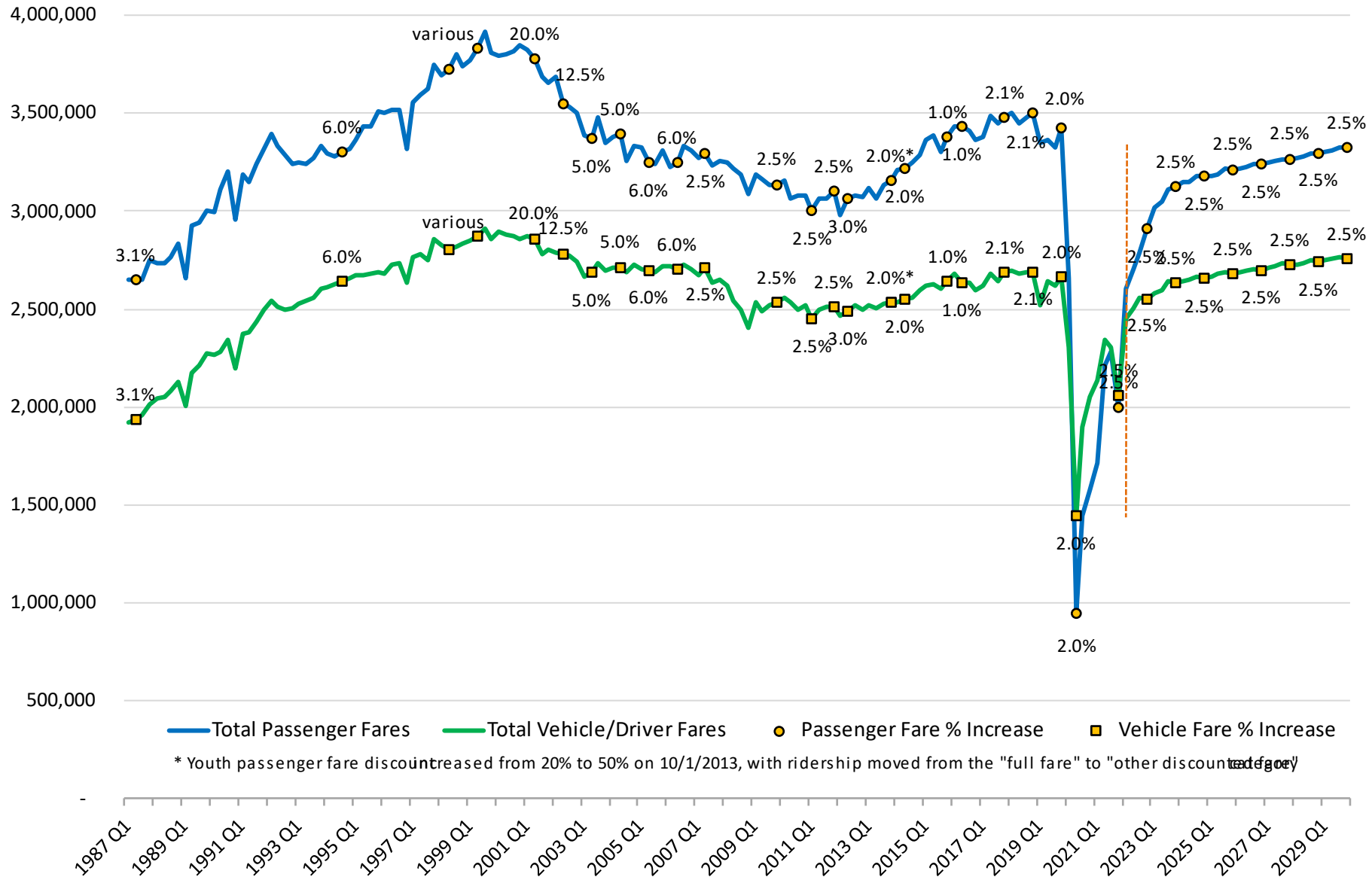
- WSF's ridership had been increasing - up 11.2% from 2012 through 2018
- 2019 saw a ridership drop of 3.2% from 2018
  - Colman Dock routes dropped 6.2%
  - Snowstorms caused a 19% drop in February
  - Only two months – January and April – showed an increase in riders compared to 2018
  - 3 routes stable or increasing – Point Defiance, Port Townsend and Sidney, B.C.
- 2019 was the first year with consistent Kitsap passenger-only ferry service on Seattle-Bremerton and Seattle-Kingston routes

## 2022 – Changes during the pandemic

- April-December ridership for 2021 increased by 43% over the same period in 2020, though still 26% below 2019
- Overall, 2021 ridership was 24% higher than 2020 and 28% below pre-pandemic levels in 2019
  - San Juan Island ridership increased by 36% in 2021 to levels that are only 5% below 2019
  - 2021 ridership on the two Colman Dock routes collectively increased by 39% over 2020, yet remain 40% below 2019 levels
  - Fauntleroy-Southworth ridership rose by only 4% in 2021 and remains 43% below 2019 levels
- Vehicle/driver fares were less impacted by the pandemic
  - Vehicle/driver fares in 2021 rebounded to within 15% of 2019 levels
  - Total passenger fares grew by 32% in 2021 but remain 37% below 2019 levels, largely due to passenger commuter fares *decreasing* in 2021 to 74% below 2019 levels

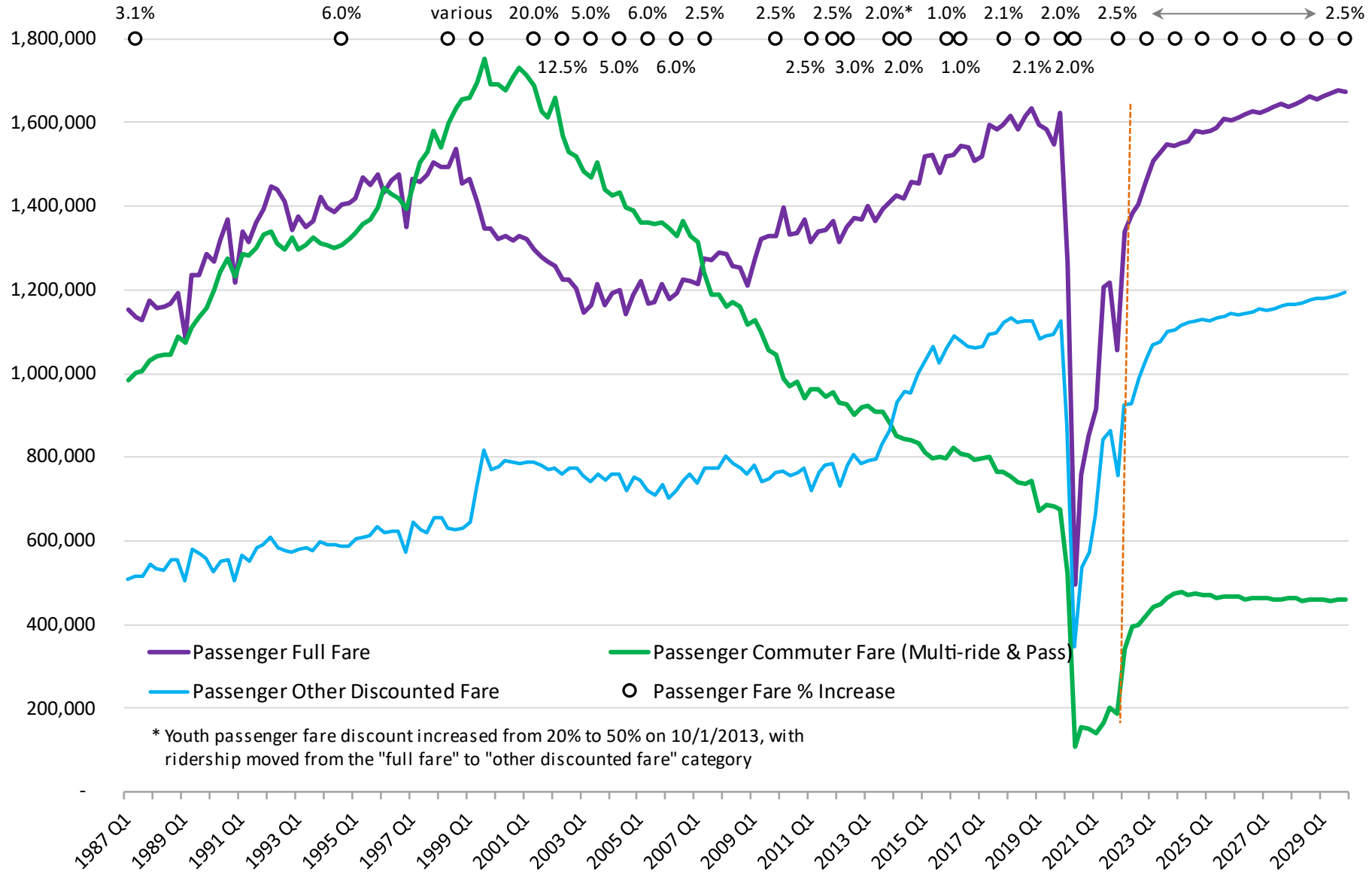
# Passenger & Vehicle Ridership Trends

## Seasonally-Adjusted Quarterly Ridership | Alternative 1 Forecast



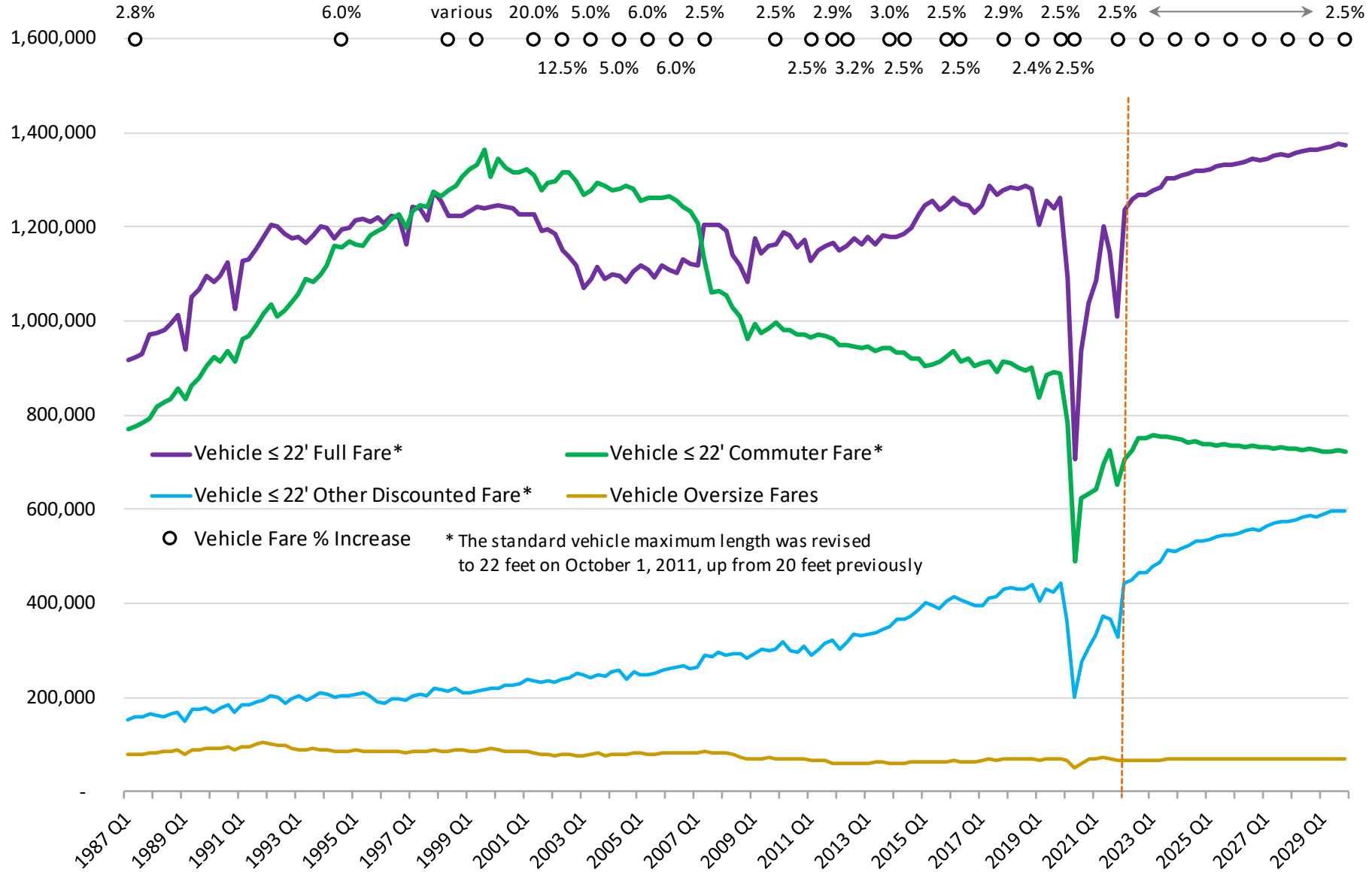
# Passenger Fare Ridership Trends

## Seasonally-Adjusted Quarterly Ridership | Alternative 1 Forecast



# Vehicle/Driver Fare Ridership Trends

## Seasonally-Adjusted Quarterly Ridership | Alternative 1 Forecast



# February Ferry Ridership and Revenue Highlights



# Fare Revenues

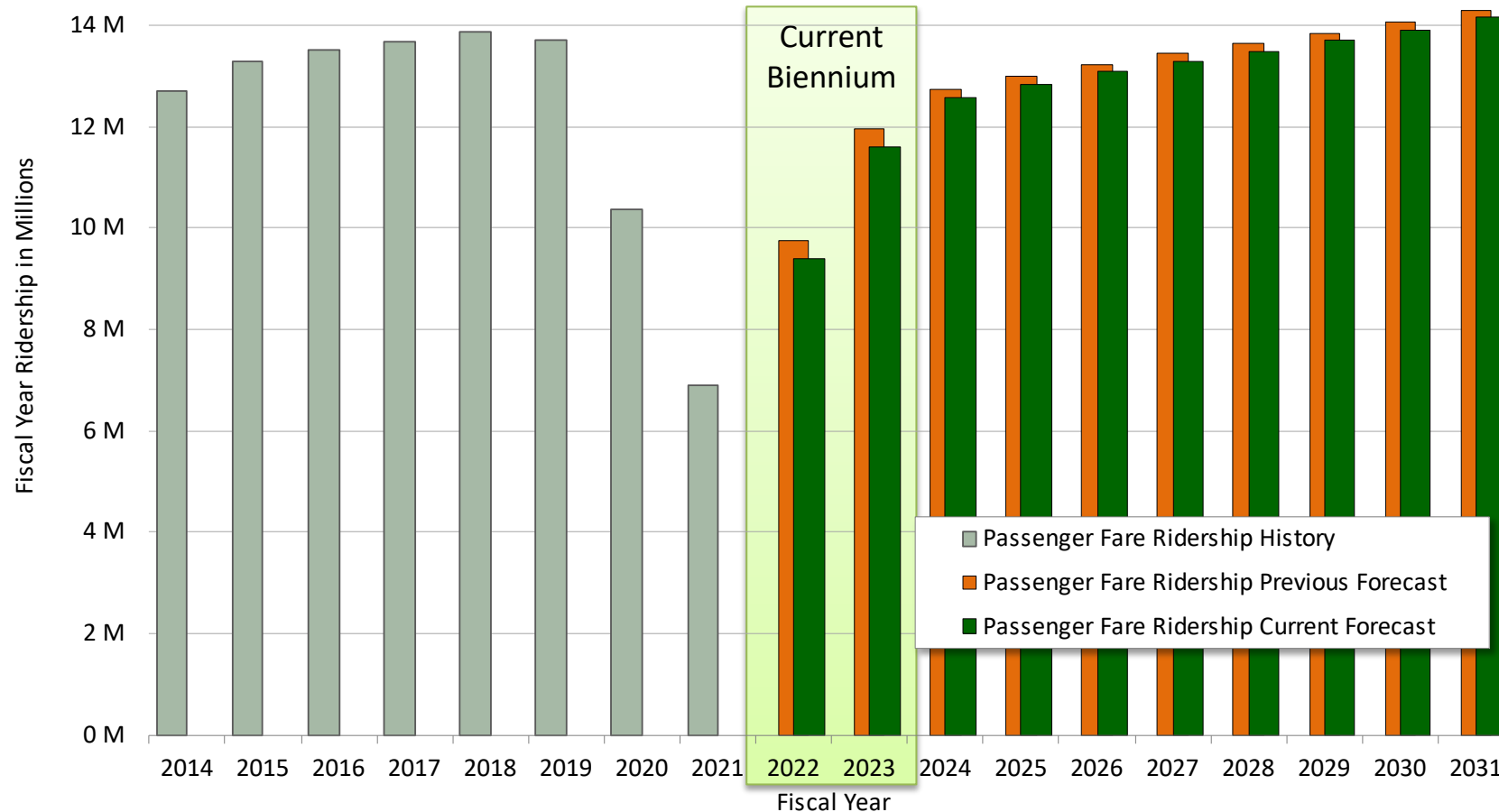
- The legislature's 2021-23 biennium budget for WSF required:
  - \$367.5 million for operations
  - \$14.4 million from the two capital surcharges
- The most recent forecast (February 2022) anticipates less ridership and fare revenue for the 2021-23 biennium:
  - \$356.5 million for operations
  - \$13.5 million from the two capital surcharges
- February forecast takes into account ridership and revenue impacts from service disruptions:
  - Now assuming a more gradual return to full service levels by July 1, 2023 (FY 2024) including the return of the Sidney, B.C. route on that date
- The next fare revenue forecast will be in June 2022

# Key factors driving the February 2022 ferry ridership forecasts

- **Recent actual ridership\* shows a continued reversal of the positive trends seen in summer 2021 with the following likely causes:**
  - Public concern and response over the rapid rise of the Omicron variant of COVID-19 (including continued public setting mask mandates)
  - Continued staffing-related service disruptions resulting in reduced service and schedule unpredictability on most routes
  - Unseasonably inclement weather in late December / early January
- **The February Forecast projections for the economic variables also contribute to lower forecast horizon ridership demand:**
  - Higher inflation projections — which result in lower real ferry fares — slightly strengthen ridership demand
  - Downward revisions to forecast period for real personal income and employment, plus higher projections for real gasoline prices through FY 2025 combine to decrease ridership demand by more than positive effects of lower real fares, thereby dampening the overall forecast period ridership and revenue projections

\* The February 2022 Forecast includes actual ridership and revenue through January 2022.

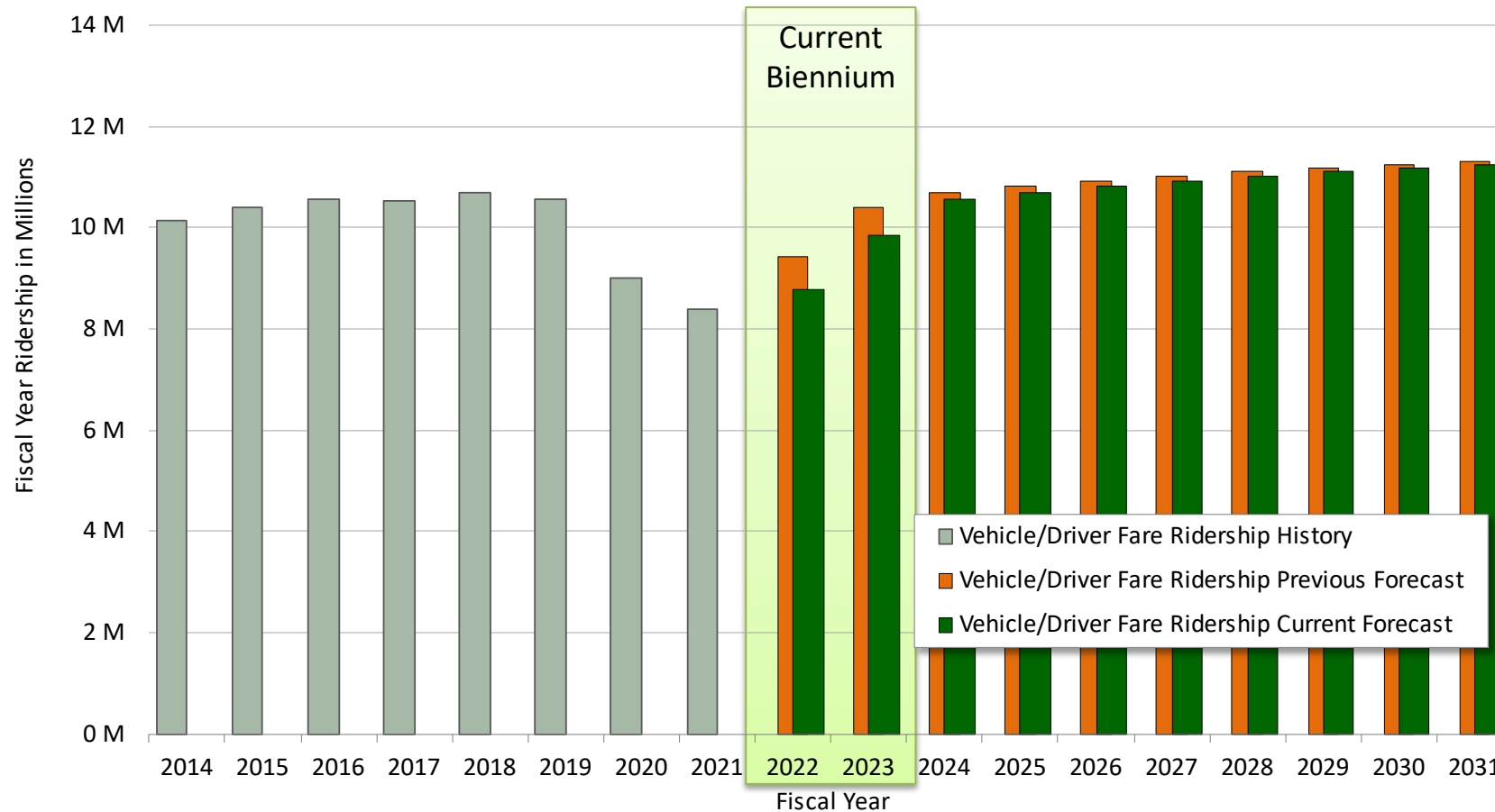
# Ferry Passenger Ridership Forecast Comparison | February vs. November



February 2022 Baseline Forecast: passenger fare ridership changes:

- FY 2022 — Annual growth +36.3% ↓ 3.7% from November
- FY 2023 — Annual growth +23.2% ↓ 3.2% from November

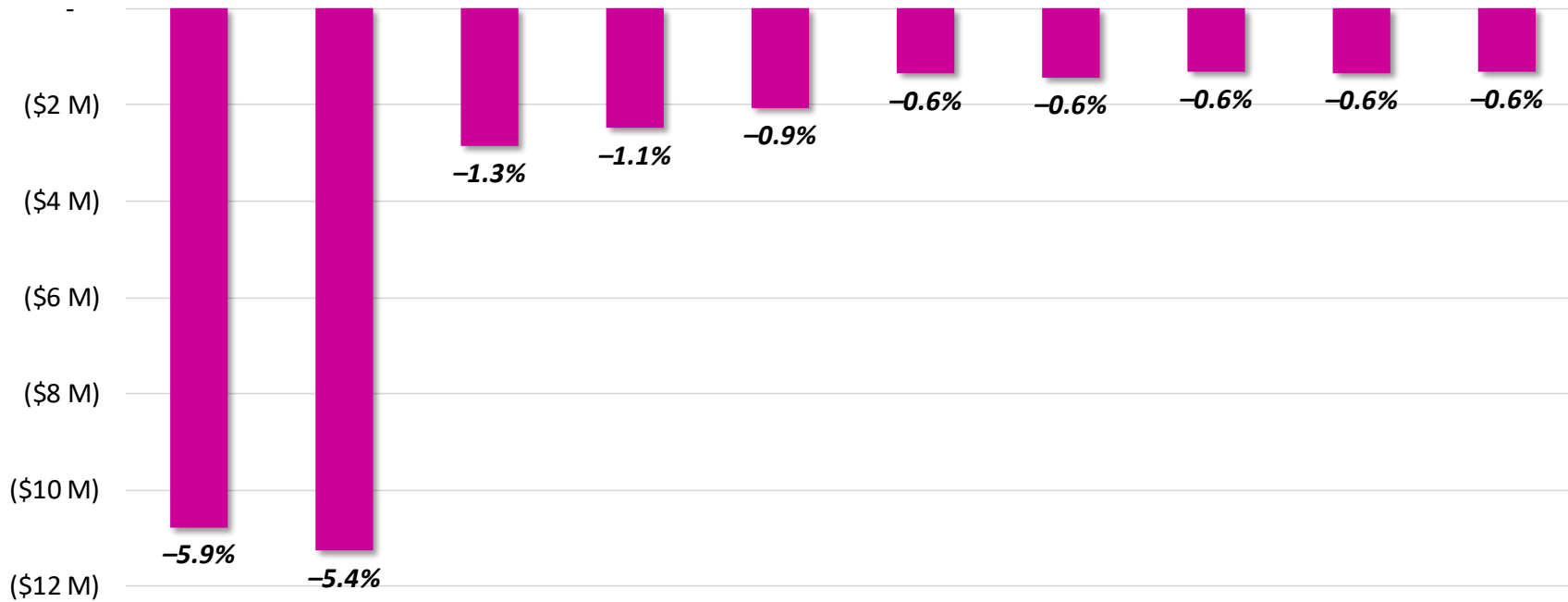
# Ferry Vehicle/Driver Ridership Forecast Comparison | February vs. November



February 2022 Baseline Forecast: vehicle/driver fare ridership changes:



- FY 2022 — Annual growth +4.5%    ↓ 6.9% from November
- FY 2023 — Annual growth +12.4%    ↓ 5.2% from November

# Change in Ferry Revenue Forecast Comparison | February vs. November




	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031
Forecast Change	(\$10.77 M)	(\$11.26 M)	(\$2.85 M)	(\$2.48 M)	(\$2.07 M)	(\$1.34 M)	(\$1.43 M)	(\$1.31 M)	(\$1.33 M)	(\$1.31 M)

November 2021 Baseline Forecast: Changes in ferry farebox revenues:

- FY 2022 —  7.30 M (3.8%) from November
- FY 2023 —  3.71 M (1.7%) from November

# Summary: November Baseline Forecast vs. prior September Forecast

## Ferry Farebox Revenue

- 2021-23 Biennium: \$369.98 M  \$22.04 M (5.6%) from November
- 2023-25 Biennium: \$435.69 M  \$5.34 M (1.2%) from November

### *Reasons for the Revisions*

- Recent trends reflecting ongoing pandemic-related concerns and economic restrictions
- Net effects of the economic variable projections
- Revised service assumptions with a more gradual transition back to full schedules

## Ferry Miscellaneous Revenue

- 2021-23 Biennium: \$7.62 M  \$0.04 M (0.5%) from November
- 2023-25 Biennium: \$11.60 M  \$0.15 M (1.3%) from November

### *Reasons for the Revisions*

- Upward revisions to terminal revenues combined with slightly higher vessel non-fare revenues resulting from vending machine price increases

# Questions?

For more information on the WSF Ridership and Fares trends,  
please contact:

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