



KING COUNTY

1200 King County Courthouse
516 Third Avenue
Seattle, WA 98104

Signature Report

March 20, 2018

Motion 15101

Proposed No. 2018-0119.1

Sponsors Dembowski

1 A MOTION acknowledging receipt of the 2017 Water Taxi
2 Ridership Analysis and Strategic Growth Report, in
3 response to the 2017-2018 Biennial Budget Ordinance,
4 Ordinance 18409, Section 112, Proviso P1.

5 WHEREAS, the 2017-2018 Biennial Budget Ordinance, Ordinance 18409,
6 Section 112, Proviso P1, states that \$100,000 shall not be expended or encumbered until
7 the executive transmits a report and a motion acknowledging receipt of the report is
8 passed by the council, and

9 WHEREAS, the King County executive hereby transmits to the council the 2017
10 water taxi ridership analysis and strategic growth report, and

11 WHEREAS, the report is submitted by the marine division to fulfill the first
12 reporting proviso obligation;

13 NOW, THEREFORE, BE IT MOVED by the Council of King County:

14 The council acknowledges receipt of the 2017 Water Taxi Ridership Analysis and
15 Strategic Growth Report, Attachment A to this motion.

16

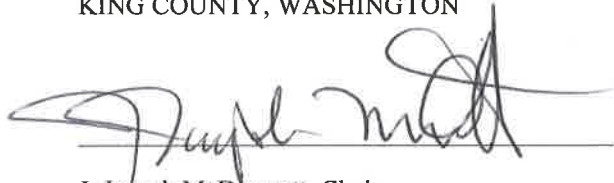
Motion 15101 was introduced on 2/12/2018 and passed by the Metropolitan King
County Council on 3/19/2018, by the following vote:

Yes: 9 - Mr. von Reichbauer, Mr. Gossett, Ms. Lambert, Mr. Dunn,
Mr. McDermott, Mr. Dembowski, Mr. Upthegrove, Ms. Kohl-Welles
and Ms. Balducci

No: 0

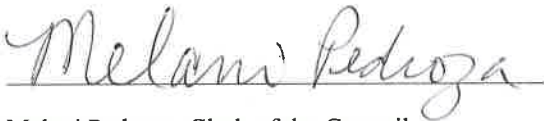
Excused: 0

KING COUNTY COUNCIL
KING COUNTY, WASHINGTON



J. Joseph McDermott, Chair

ATTEST:



Melani Pedroza, Clerk of the Council

Attachments: A. 2017 Water Taxi Ridership Analysis and Strategic Growth report



King County Marine Division - 15101

2017 Water Taxi Ridership Analysis and Strategic Growth Report

As Required By:
Ordinance 18409, Section 112, Proviso P1

Paul Brodeur – Director, Marine Division

January 2018

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Introduction

This report responds to the request for information outlined in the 2017-2018 adopted budget. Ordinance 18409, Section 112, Proviso P1 states:

Of this appropriation, \$100,000 shall not be expended or encumbered until the executive transmits a report and a motion that should acknowledge receipt of the report and reference the subject matter, the proviso's ordinance, ordinance section and proviso number in both the title and body of the motion and a motion acknowledging receipt of the report is passed by the council.

The report shall include, but not be limited to:

A. Ridership demographics for the peak season, April through October 2017, during commute and non-commute times;

B. The effect of the passenger only ferry ridership on the local and regional economy;

C. Strategies to increase ridership for commuters, visitors and other riders; and

D. Strategies to increase revenue from sources other than property tax, grants and fares.

The executive should file the report and a motion required by this proviso by January 31, 2018, in the form of a paper original and an electronic copy with the clerk of the council, who shall retain the original and provide an electronic copy to all councilmembers, the council chief of staff and the lead staff for the transportation, economy and environment committee, or its successor.

Background

The King County Marine Division (KCMD) is part of the King County Department of Transportation that provides passenger ferry service during commute and non-commute hours between West Seattle and downtown Seattle as well as commute-only passenger ferry service between Vashon Island and downtown Seattle.

In 2006 the Washington State Legislature passed a bill that allowed King County to form a ferry district and levy ad valorem property tax to support passenger-only ferry (POF) service. Based on this legislation, King County formed the King County Ferry District (Ferry District) in 2007. The property tax was levied in 2008 to provide funding for the POF service on the Vashon Island to downtown Seattle route, previously operated by Washington State Ferries (WSF), and the West Seattle to downtown Seattle demonstration route known as the Elliott Bay Water Taxi, previously operated by King County Metro Transit under contract. The Ferry District contracted operations of the King County Water Taxi (KCWT) service to the KCMD and in-house service began in 2009 and 2010 for each route respectively.

In 2014, the state legislature approved Substitute Senate Bill 6216 that allowed counties to operate ferry systems under the county legislative authority. Following enactment of this bill, King County Council passed ordinance 17935 and moved to assume all “rights, powers, functions, and obligations” of the Ferry District and transfer responsibility to King County effective January 1, 2015.

MARINE DIVISION STRATEGIC PLANNING

Since inception, the KCMD has operated the Water Taxi under the framework of the 2007 Implementation Plan and the governance of the Ferry District. While still in startup mode, the Marine Division steadily increased ridership and developed the passenger ferry service. This was supported by providing on-time and reliable service, increasing the capacity on previously leased vessels, building a new maintenance facility, completing various terminal improvements, acquiring a backup vessel, creating a marketing program and building two larger capacity vessels.

In late 2014, the Ferry District approved a strategic plan for passenger ferry service in King County. This plan, along with King County’s Strategic Plan, provides the foundation that supports passenger ferry service as a component of the region’s transportation system. The King County Council approved a report on potential route expansion within King County early in 2016 (Final Report on Ferry Expansion Options for Marine Division).

As part of ongoing business and strategic planning, KCMD continues to evaluate existing service as well as the potential for expanding service and contracting service with other jurisdictions or private partnerships. This is accomplished through regularly surveying customers, analyzing existing operations, researching and projecting population and potential ridership growth, and by building relationships and collaborating with other transit agencies and private operators in the region.

In addition to these efforts, KCMD performed the following analyses to respond to the budget proviso which are summarized in this report:

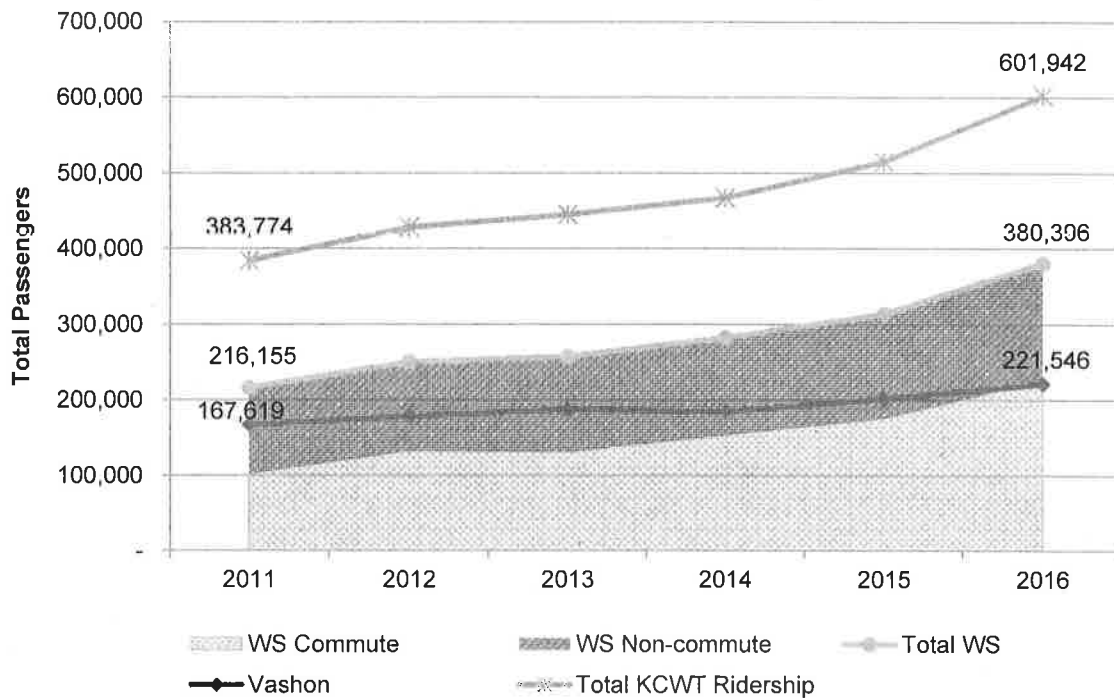
- Reviewed historical ridership trends and demographics of the KCWT service areas.
- Conducted a survey of passengers during the 2017 peak season (peak season is defined as April through October) to analyze current ridership demographics, how people are utilizing the KCWT and how riders are connecting with KCWT.
- Assessed trends in population, economic growth, transit, and reviewed ongoing and emerging transportation projects for the Puget Sound region.
- Analyzed previous surveys and research conducted to develop potential strategies for increasing KCWT ridership and revenue.

Specific Responses to the Proviso

A. Ridership demographics during the peak 2017 season during the commute and non-commute times

In 2016, the KCWT carried over 221,000 passengers on the Vashon Island route and 380,000 passengers on the West Seattle route. Ridership has been steadily increasing at a compound annual growth rate of 9.4 percent since 2011. Figure 1 illustrates the trends in ridership for the West Seattle (indicated as WS) and Vashon Island routes.

Figure 1: KCWT Ridership from 2011-2016



RIDERSHIP DEMOGRAPHICS

KCMD conducted a survey during the peak season in July and August 2017 to obtain a snapshot of the demographics of KCWT passengers. This survey gathered information about how passengers use the service and how it could be improved to better meet their needs. The survey was available online for nine days and onboard the KCWT on one weekend day and four week days. KCMD promoted the survey through onboard posters, rider alert emails and texts, the KCWT Captain's blog, and the West Seattle blog.

The survey received 1,579 total responses (562 paper surveys completed onboard and 1,017 completed online). Of the responses, 725 were from passengers riding the Vashon Island route (46 percent) and 854 were from passengers riding the West Seattle route (54 percent).

COMBINED RIDERSHIP DEMOGRAPHICS

The following sections highlight some of the demographic information for commuters and non-commuters on both KCWT routes received from KCWT survey respondents. The summarized survey results indicate the type of trip taken by the passenger, race, income and age distributions for both the West Seattle and Vashon Island routes. Detailed survey results are provided in Appendix A.

Commuting and Non-Commuting Passengers

Overall, the majority of survey respondents indicated they were commuting to work or school. This includes the Vashon Island route that is primarily commuters as well as the West Seattle service that is nearly split evenly between commuters and non-commuters. The different service provided between each of the routes is reflected in the distribution of rider types shown in the graphs. Figure 2 provides the distribution of commuters and non-commuters on both KCWT routes and Figure 3 illustrates the passenger types by route.

Figure 2: KCWT Passenger Types: Commuters and Non-Commuters

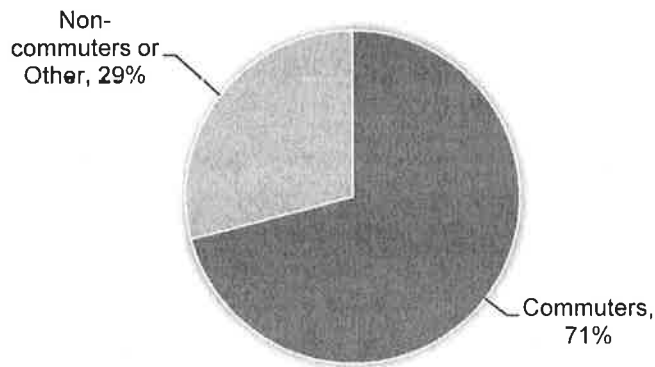
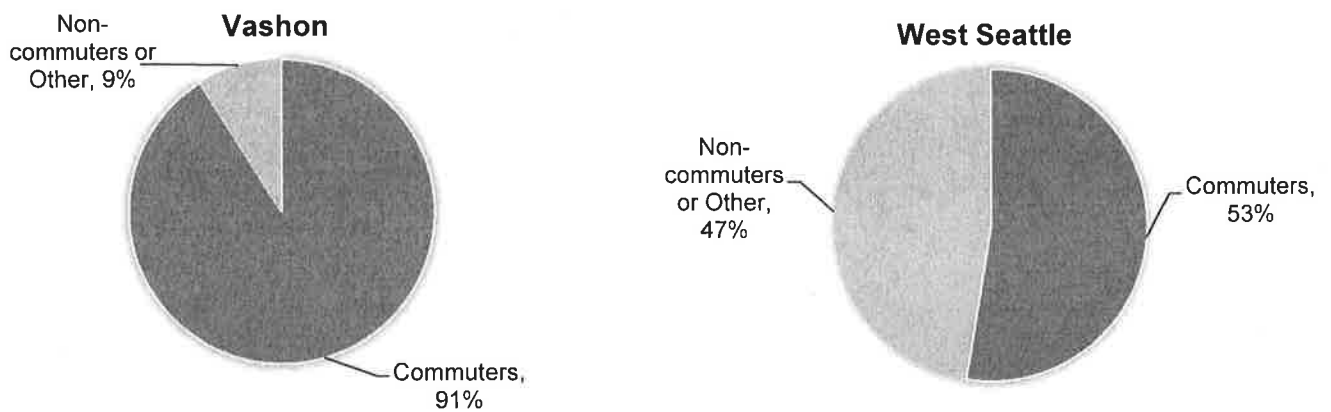


Figure 3: KCWT Passenger Types (Commuters and Non-Commuters) by Route



Race

The majority of survey respondents identified themselves as white. The racial makeup of riders mirrors that of the service area population. The non-commuting respondents were slightly more diverse with more respondents identifying as Asian or Pacific Islander and two or more races. Figures 4 and 5 provide the combined results for Vashon Island and West Seattle commuters and non-commuters respectively.

Figure 4: KCWT Identified Race for Commuters

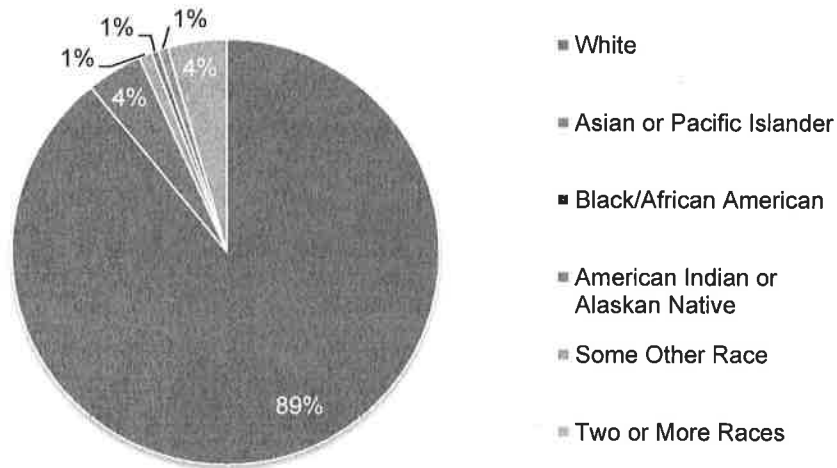
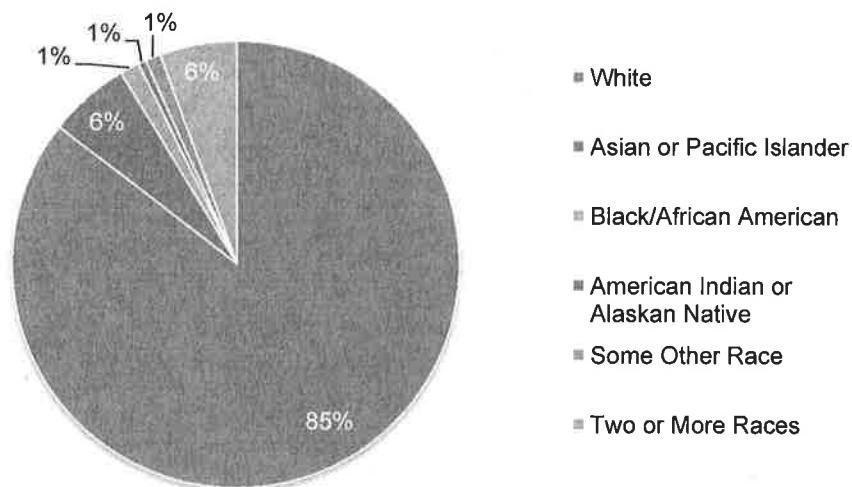


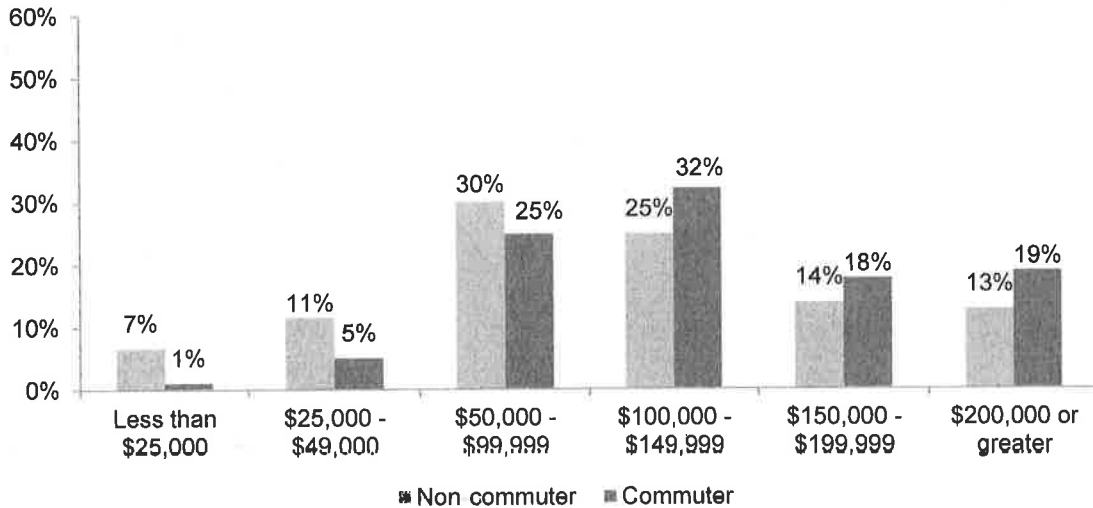
Figure 5: KCWT Identified Race for Non-Commuters



Income Distribution

Combined survey responses for both Vashon and West Seattle KCWT routes indicate that the annual household income for most passengers is between \$50,000 and \$150,000. Figure 6 illustrates the combined income distribution for both KCWT routes.

Figure 6: KCWT Passenger Income Distribution

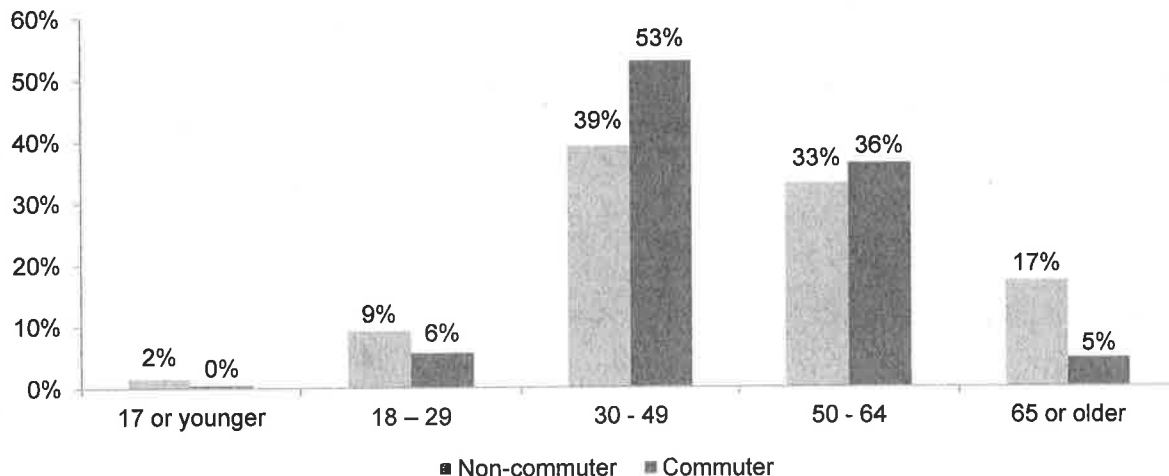


Note: 183 commuters (16 percent) and 117 non-commuters (25 percent) preferred not to answer and are not included in the percentages above.

Age Distribution

Based on the survey results, most commuters are between 30 and 49 years of age, followed by passengers aged 50 through 64. While the non-commuters follow a similar trend, the age group 65 or older has a larger share of the non-commuters. Figure 7 illustrates the combined age distribution for KCWT commuters and non-commuters.

Figure 7: KCWT Passenger Age Distribution



Note: 101 commuters (9 percent) and 59 non-commuters (13 percent) preferred not to answer and are not included in the percentages above.

B. The effect of the passenger-only ferry ridership on the local and regional economy

To assess the effects of the KCWT ridership on the local and regional economy, KCMD considered what the regional economy is experiencing in terms of population growth and job growth, the impacts of growth on the Puget Sound region's transportation network and emerging transportation trends. Based on this analysis, KCMD analyzed KCWT ridership growth over the past five years and identified the economic benefits that are unique to the KCWT service.

REGIONAL GROWTH TRENDS

The Puget Sound region has experienced significant growth since the Great Recession. This growth affects the regional transportation network. As with the rest of the regional transit network, the KCWT has experienced significant increases in ridership. The following sections describe the population and job growth and expected trends along with the economic contributions of KCWT.

Population and Job Growth

King County, as well as the entire Puget Sound region, has seen significant growth since 2010. King County's population grew by 6.3 percent between 2010 and 2015, while the Puget Sound region's population grew by 5.6 percent. In addition to population growth, unemployment rates have declined by about 4 percent and about 270,900 jobs have been added since 2011.¹ The Puget Sound Regional Council (PSRC) expects the growth trend to continue, forecasting that by 2040 the Puget Sound region will add 600,000 households and 850,000 jobs.² In the City of Seattle alone, the downtown Seattle Urban Center is projected to accommodate an additional 12,000 housing units and 35,000 jobs by 2035.³

Regional Transportation Network

One of the impacts of this growth has been the increased vehicular traffic experienced in the Puget Sound region. Delay on regional freeways has increased by 95 percent between 2010 and 2015.⁴ In 2016, Seattle was found to be the tenth worst city in the U.S. in terms of traffic congestion, with 54.8 hours lost per commuter per year.⁵ Time lost in traffic costs businesses and residents, and lowers quality of life. Because freeway capacity is limited, transit options and transit ridership plays a critical role in reducing the negative impacts of growth on regional mobility.

Population and job growth require more transportation options to move more people to jobs and services. While population and employment have grown in the Puget Sound region, transit ridership has increased at a faster pace. PSRC reported a 14 percent increase in transit ridership since July 2011.⁶ A 2017 survey conducted by Commute Seattle found that 47 percent of workers employed in downtown Seattle use transit for their daily commute.⁷

¹ PSRC Puget Sound Trends, 2017 <https://www.psrc.org/sites/default/files/trend-jobs-201702.pdf>

² *Draft Economic Analysis of the Puget Sound Region*, Puget Sound Regional Council, August 23, 2017

³ *Seattle 2035 Comprehensive Plan*, City of Seattle, November 2016.

⁴ Freeway Count Detectors, TRAC Flow, –Washington State Department of Transportation

⁵ 2016 Traffic Scorecard Report, INRIX <http://inrix.com/scorecard-city/?city=Seattle%3B%20WA&index=23>

⁶ PSRC Puget Sound Trends, 2016 <https://www.psrc.org/sites/default/files/trend-transitridership-201609.pdf>

⁷ <https://commuteseattle.com/mediakit/2017-mode-split-press-release/>

Transit Mode Trends

Trends in preferred transportation modes are also evolving. In a 2014 survey studying regional household travel, PSRC found that Millennials have differing transportation habits than Generation X and Baby Boomers. Millennials indicated that they drove alone for 43 percent of trips, compared to 59 percent for the older generations. Additionally, the survey found that Millennials were more likely to walk and ride transit.⁸ These results may indicate a shift in traditional transportation habits and attitudes towards driving versus using transit that could continue into the future.

ECONOMIC BENEFITS OF KCWT

With the demand for transit options increasing in the Puget Sound region, KCWT provides reliable and consistent service, increases accessibility within the region by providing another transit option for commuters and non-commuters, provides tourism and recreational opportunities, and improves transportation system resiliency in the regional transportation network. Both commuters and non-commuters use the KCWT to travel to and engage in activities that contribute to the economy. This section explores how the attributes of the KCWT contribute both directly and indirectly to the local and regional economy.

Reliability

Commuters are interested in transportation options that safely and reliably get them to and from their destination. By utilizing waterways, the KCWT is not affected by vehicle traffic congestion. This allows KCWT to be one of the most consistent and reliable forms of public transit in the Puget Sound region. Performance measures are closely monitored by KCMD through tracking on-time performance and service reliability. In 2016, the KCWT was on-time and reliable over 99 percent of the time. Consistent, on-time, reliable service provides certainty for passengers that the KCWT will depart on time and will get them to their destination in a timely manner.

Transit Connections and Benefits

By increasing access to the regional transit network, the KCWT moves more people around the region and contributes to the local and regional economy. The KCWT's integration with the regional fare collection system (ORCA) allows for quick and seamless transfers to other regional transit modes like Metro buses and Link light rail. KCMD also provides shuttles in West Seattle to connect Water Taxi passengers to their destinations.

In addition to integrated fares, the KCWT complements the existing transit network by providing another transit option to passengers, reducing congestion and freeing up more capacity on existing transit. King County Metro conducted a survey of West Seattle bus riders in 2013. The survey found that the main areas needing improvement were overcrowding on buses, unreliability of schedule, and the need for expanded or increased service.⁹

The uncongested waterways provide a relaxing commute. Passenger vessels are limited to a certain passenger capacity and the KCWT provides a seat for all passengers. This allows passengers to experience a stress-free trip, which aligns with King County's Strategic Plan objective of improving overall health and personal well-being and supporting a healthy workforce which promotes economic vitality, another Strategic Plan goal.

The benefits and attributes of the KCWT have increased the demand for KCWT commute service to move passengers to and from their jobs that drive the local and regional economy.

⁸ PSRC Regional Household Travel Survey, 2014

⁹ <https://metrofutureblog.wordpress.com/2013/01/17/west-seattle-rider-questionnaire-what-you-told-us-whats-next/>

Table 1 provides a comparison of total and daily average commuter passengers in 2011 and 2016.

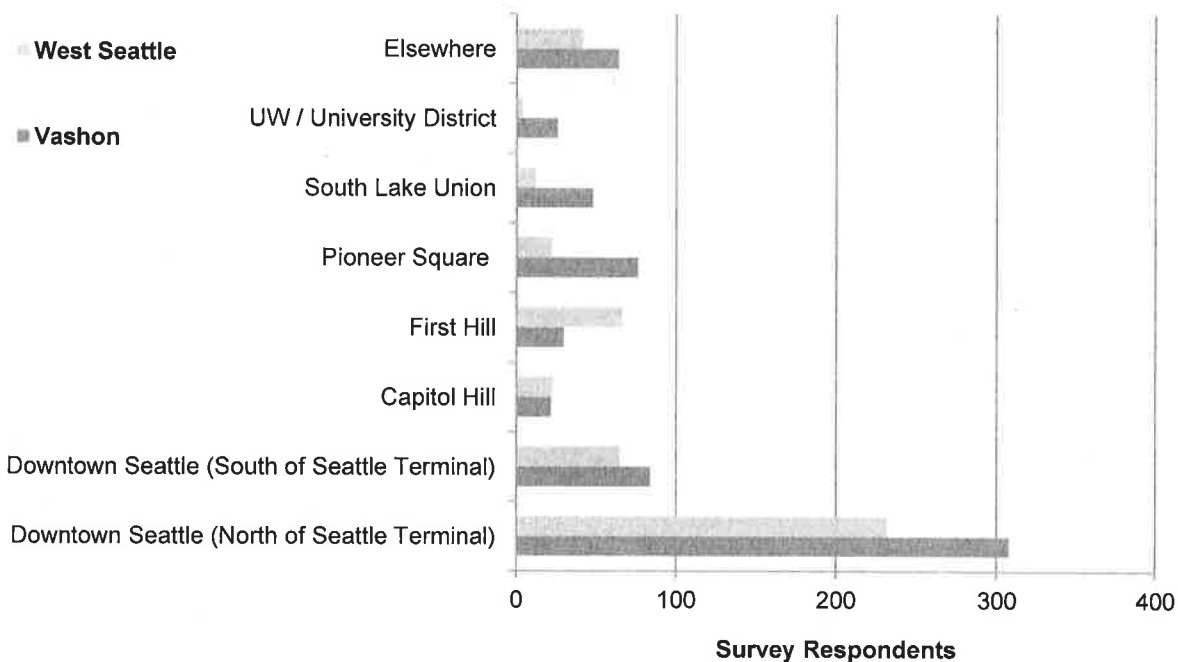
Table 1: Commuter Annual and Average Daily Ridership in 2011 and 2016

	Total Passengers			Daily Average		
	2011	2016	% Increase	2011	2016	% Increase
West Seattle Commuter	102,076	226,452	122%	408	897	120%
Vashon Commuter	167,619	221,546	32%	668	883	32%

Source: KCMD, 2017

Based on the survey responses, the KCWT moves most commuters to areas around the Seattle region and the majority of passengers indicated they were commuting to downtown Seattle. These areas are part of the downtown Seattle Urban Center that is projected to receive about 35,000 more jobs before 2035. Figure 8 illustrates where KCWT commuting passengers indicated they were commuting to.

Figure 8: Commute Destinations for both West Seattle and Vashon Passengers



Tourism

The KCWT provides an easy and scenic means of travel to an area that recreational visitors might otherwise avoid. For tourists and casual riders seeking to be on the water and enjoy the Seattle skyline, KCWT provides a convenient and affordable attraction while visiting the Seattle waterfront. Visit Seattle, a non-profit marketing organization, lists the Seattle Waterfront as one of the top 25 things to do in Seattle, and mentions the KCWT to West Seattle as a recommended excursion. In the 2017 survey, 17 percent of survey respondents traveling to/from West Seattle indicated they lived outside the downtown Seattle and West Seattle areas.

While KCWT serves many commuters, the West Seattle route draws high volumes of recreational passengers in the summer months. Alki Beach is a business district and tourist destination providing scenic views that is home to many restaurants and retailers with limited parking, to

which the KCWT provides a car-free travel option. Among survey respondents, 39 percent indicated that the purpose of their trip was “Fun/social/recreation” or “Shopping/errands.” Many of these passengers are contributing to the local economy by traveling to West Seattle and shopping at local stores or eating at local restaurants. Others are avoiding parking in downtown Seattle when visiting the city to attend sporting and other events or waterfront shopping and dining.

Non-commuter ridership on the West Seattle route is growing. Since 2011, West Seattle non-commuter ridership has increased by 39 percent on weekends and 68 percent during non-commute weekday hours. Table 2 indicates the daily averages for weekday and weekend ridership during those years.

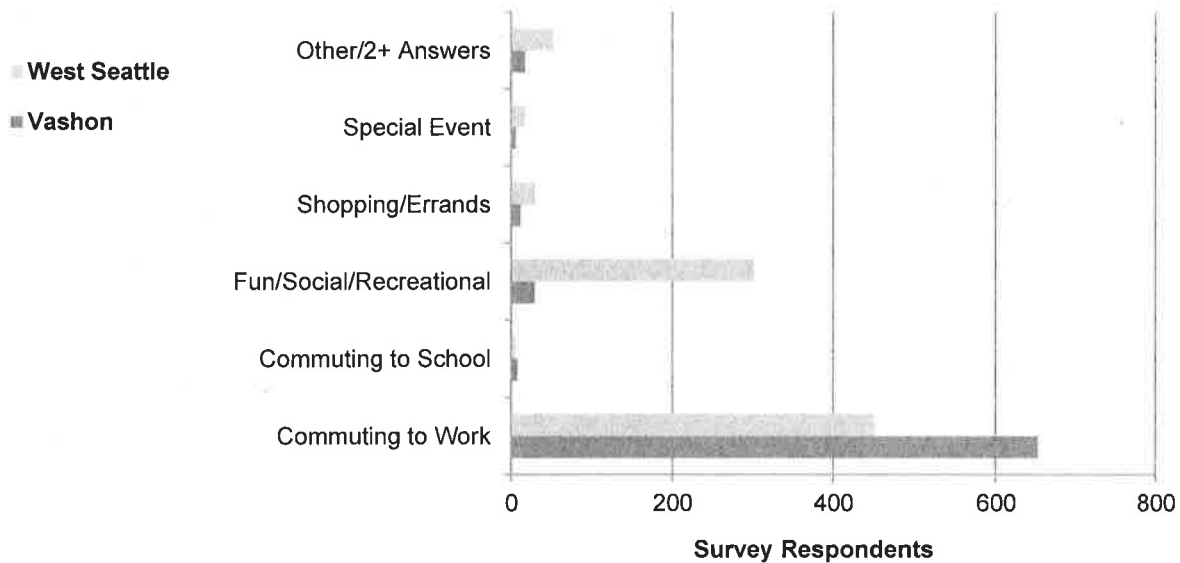
Table 2: West Seattle Non -Commuter Weekend / Weekday Average Daily Ridership in 2011 and 2016

	Weekend Daily Average			Weekday Daily Average		
	2011	2016	% Increase	2011	2016	% Increase
West Seattle Non-Commuter	1,043	1,454	39%	288	483	68%

Source: KCMD, 2017; BERK, 2017

Based on the 2017 survey, most trips were for commuting to work and school, but a number of trips were for recreational activities. Figure 9 illustrates the purpose of trips taken by survey respondents for both KCWT routes.

Figure 9: Purpose of Trips for both West Seattle and Vashon Passengers



System Resiliency in the Regional Transportation Network

Ferries provide another travel option when congestion, accidents, or emergency situations occur on the landside of the regional transportation network. For example, during the Alaskan Way Viaduct closure in 2016, average daily weekday ridership surged to over 2,800. This was more than triple the average daily weekday ridership of the previous year. This ability to move

people efficiently during failures of the road network increases the resiliency of our region's transportation system to maintain economic productivity.

C. Strategies to increase ridership for commuters, visitors and other riders

KCMD has experienced significant ridership increases since 2009, when it began operating passenger ferry service. The expectation is to continue that trend by maintaining safe, reliable and on-time service.

The new KCWT passenger ferry terminal at Pier 50 is part of a multi-modal transportation hub on the Seattle Waterfront. The Seattle Waterfront will experience a significant transformation over the next 10 years with the removal of the Alaskan Way Viaduct and street improvements along the waterfront, including bus and streetcar route changes, new bike lanes, and improved pedestrian access. These improvements are anticipated to make access to and from the KCWT easier for commuters and recreational travelers alike. Removing the Alaskan Way Viaduct will also reduce the ease of access from West Seattle to downtown Seattle for motorists. The combined impacts of these changes are anticipated to result in continued growth in demand for KCWT service. KCMD is evaluating the demand to identify opportunities to accommodate growing ridership.

Based on the changing landscape in Seattle, KCMD is continuing to research and implement marketing strategies to more effectively communicate the benefits of the KCWT to passengers. The following sections describe different opportunities for KCMD to increase ridership for both commuters and other riders.

COMMUTERS

To increase commuter ridership, KCMD identified marketing, additional service during commute times, and new service options. The following sections outline these options for increasing ridership.

Marketing

As part of the 2017 customer survey and in previous surveys, passengers have expressed their desire for reduced travel time to get to and from their destination and increased accessibility to the KCWT terminals. Communicating how passengers can make their commute quicker or showing available connections at the terminals can entice ridership. Building on the interest of KCWT passengers and the existing marketing campaign, KCMD could explore the following marketing and communication opportunities:

- Promoting the quick connections from the light rail to the KCWT at Pier 50.
- Marketing opportunities at the new Pier 50 facility and/or on the vessels.
 - As an example, announcements can be shown on the monitors that display the schedule and vessel watch.

Increasing Commuter Ridership in West Seattle

Increased frequency would allow more opportunities to catch the KCWT to Seattle, reduce wait times, and minimize the need for passengers to time their travel according to the ferry schedule. In previous surveys, West Seattle passengers also expressed interest in better access to the KCWT. KCMD will look for ways to improve access to the KCWT to increase accessibility and meet demand. These options could include:

- Increasing parking options for passengers in the vicinity of the West Seattle terminal through partnering with the Port of Seattle or other City of Seattle Parks and Recreation parking areas to shuttle passengers.
- Partnering with Metro to increase capacity on the shuttles, working with Metro to review and collaborate to increase access, and/or improving timing of transit connections to KCWT arrivals and departures.

VISITORS AND OTHER RIDERS

KCMD has identified the following marketing strategies and service level expansion to encourage visitors and other riders to take the KCWT.

Marketing

KCMD manages an annual marketing campaign along with a college marketing internship program. The internship program challenges the students to create opportunities to expand brand visibility and refine KCWT's social media presence to generate new ridership. The marketing efforts include placing sandwich boards at various Seattle Waterfront locations that provide details about the KCWT service and schedule. Other marketing efforts include creating rack cards and using a marketing material distribution vendor to distribute them in over 250 tourist hubs in the greater Seattle area. This marketing campaign has generated more awareness of KCWT service and increased tourist ridership.

Building on these efforts, other marketing opportunities geared toward non-commuters could include:

- Highlighting the different leisure activities in West Seattle and Vashon in the existing KCMD marketing and communications materials, like: the wide variety of restaurants in West Seattle, biking along Alki Beach in West Seattle, or biking around rural Vashon Island.
- Partnering with businesses to offer discounts in West Seattle and on Vashon Island for using the KCWT to support that business.
- Adding to the existing KCMD marketing campaign, to highlight the Seattle bike share program in West Seattle and include the travel times to various venues like Alki Beach.

Expanding Service to Vashon Island

In KCMD surveys, Vashon Island passengers have continued to express interest in expanded service mid-day, later evening and weekends. Expanding service during these non-commute periods of time is expected to result in increased ridership.

D. Strategies to increase revenue from sources other than property tax, grants and fares

While KCMD has funding support in the form of property tax revenue, grants and fares, KCMD has continued to research other opportunities to supplement these revenue sources including concessions, advertising and providing services from KCMD-owned facilities.

Concessions and Advertising

Many transit providers provide concessions and allow advertising in their facilities as supplemental revenue sources. In 2015, KCMD conducted an analysis, including a request for information for providing concessions like coffee and alcohol on the Vashon Island route. The analysis included a revenue estimate for both the concessionaire and King County that showed low profitability and very limited vendor interest in operating a service due to the nature and length of the routes.

KCMD has researched advertising options and found that new policy and legal requirements would need to be in place prior to initiating advertising contracts. Even after those were set up, the market for advertising would be in a geographically restricted area and the revenue generated would be very limited. In addition, the division has received guidance from legal counsel that it would take only a limited number of legal challenges that could be costly and outweigh any potential revenue generated.

In the near-term the areas of concessions and advertising may not pencil out as revenue positive, but as KCMD continues to show growth, these options will be reviewed as a possible means of supplementing the existing revenue sources.

Partnering with Other Agencies or Passenger Ferry Services

KCMD owns and operates the Moorage and Maintenance Barge located at Pier 48 where KCMD conducts routine maintenance and repairs on the KCWT fleet. Maintenance services could be contracted to other King County divisions or City of Seattle departments that maintain watercraft like the Wastewater Treatment Division and Seattle Fire Department. These services could also be contracted to other agencies that have vessels needing maintenance.

Additionally, KCMD will own the Pier 50 terminal once construction of the new facility is complete in the fall of 2018. As a result, KCMD can provide use of this facility by other passenger ferry systems that could generate revenue through leasing agreements. For example, KCMD would be in the position to charge landing fees for Kitsap Fast Ferry to land at Pier 50.

Exploring the possibilities of providing contracted ferry service to other jurisdictions or creating a public-private partnership to provide new ferry service would result in economies of scale for the administration and operation of passenger ferries as well as increased utilization of existing county-owned assets. It could also provide an additional revenue stream to help offset the overhead and fixed costs associated with operating ferry service.

Summary

As part of the continued strategic planning efforts, KCMD has assessed the ridership demographics during the peak 2017 season, researched the local and regional growth along with KCWT ridership trends, and presented strategies on increasing ridership and revenue. The following summary highlights the findings in response to each element of the budget proviso:

- Ridership demographics during the peak 2017 season during commute and non-commute times:
 - Based on survey responses, most KCWT passengers are commuters (71 percent).
 - Non-commuters make up nearly half the survey respondents for the West Seattle route.
- The effect of the passenger-only ferry ridership on the local and regional economy:
 - Seattle relies on transit to support population growth and economic development.
 - The West Seattle route carries significant portions of recreational passengers between downtown Seattle and West Seattle that support local and downtown retailers.
- Strategies to increase ridership for commuters, visitors and other riders:
 - Exploring other marketing opportunities and expanding the existing marketing program.
 - Expanding service to Vashon Island and/or increasing service frequency to West Seattle.
 - Enhancing passenger connections to the KCMD ferry terminal that complement the transportation improvements occurring as part of the downtown Seattle Waterfront project.
- Strategies to increase revenue from sources other than property tax, grants and fares:
 - Continuing to explore concessions and advertising opportunities.
 - Partnering with other vessel-owning public agencies and passenger ferry services to use KCMD facilities and to provide operations and maintenance through contracted service.

Appendix A

Demographic Survey Results

SURVEY OVERVIEW

KCMD conducted a survey during the peak season in July and August 2017 to obtain a snapshot of the demographics of KCWT passengers. This survey gathered information about how passengers use the service and how it could be improved to better meet their needs.

The Vashon KCWT service only operates during commute periods; therefore, the majority of the survey respondents were commuters. In contrast, the West Seattle KCWT service is offered throughout the day, evening and weekends during peak season and survey respondents were mixed between commuters and non-commuters.

The survey received 1,579 total responses (562 paper surveys completed onboard and 1,017 completed online¹⁰). Of the responses, 725 were from passengers riding the Vashon Island route (46 percent) and 854 were from passengers riding the West Seattle route (54 percent).

Promotion

KCMD promoted the survey through onboard posters, rider alert emails and texts, the KCWT Captain's blog, and the West Seattle blog.

Survey Questionnaire

The survey asked a series of questions aimed at understanding where passengers live and purpose of the passenger's KCWT trip, alternative modes used to make their trip, frequency of riding the KCWT, why passenger's chose the KCWT, what can be improved, and demographic questions. The survey questionnaire can be found on pages A-9 through A-10.

Methodology

The survey was available online for nine days and onboard the KCWT on one weekend day and four week days.

The survey was also available online through Survey Monkey from July 27, 2017, through August 4, 2017. Printed surveys were distributed onboard KCWT vessels during the following sailings:

¹⁰ Onboard posters directed riders to complete the survey via cellphone. Therefore, many of the online survey responses could have been completed by ferry riders.

Vashon Island Route		
Date	Departure Terminal	Sailing
Tuesday, 8/1/17	Vashon	6:10 AM
	Vashon	7:10 AM
	Vashon	8:15 PM
Wednesday, 8/2/17	Vashon	7:10 AM
	Vashon	8:15 AM

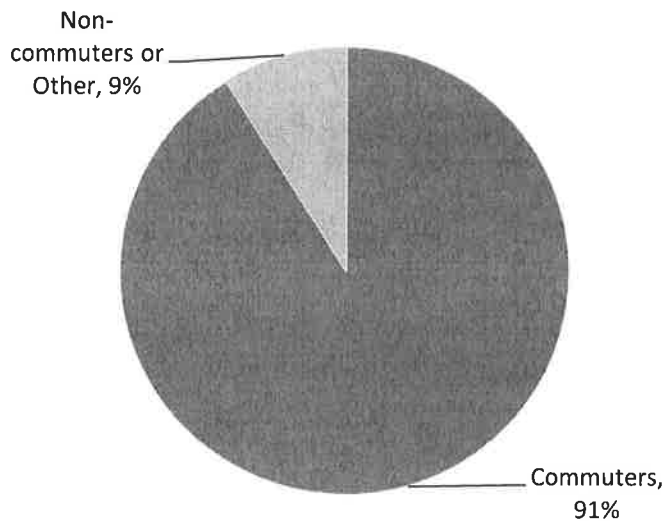
West Seattle Route		
Date	Departure Terminal	Sailing
Saturday, 7/29/17	Seattle	12:30 PM
	West Seattle	1:00 PM
	Seattle	1:30 PM
	West Seattle	2:00 PM
	Seattle	2:30 PM
	Seattle	3:30 PM
	West Seattle	4:00 PM
Monday, 7/31/17	Seattle	4:00 PM
	West Seattle	4:15 PM
	Seattle	4:45 PM
	West Seattle	5:00 PM
	Seattle	5:15 PM
Tuesday, 8/1/17	West Seattle	6:15 AM
	Seattle	6:30 AM
	West Seattle	6:45 AM
	Seattle	7:15 AM
	West Seattle	8:00 AM
	Seattle	8:15 AM
Wednesday, 8/2/17	West Seattle	6:45 AM
Thursday, 8/3/17	Seattle	4:45 PM
	West Seattle	5:00 PM
	Seattle	5:15 PM
	West Seattle	5:30 PM
	Seattle	5:45 PM

The following sections provide demographic information for commuters and non-commuters for KCWT survey respondents separately for the Vashon Island and West Seattle routes.

VASHON ISLAND DEMOGRAPHICS

The commute-only KCWT service to Vashon Island is predominately used by people traveling to and from work in the City of Seattle. Therefore, demographic characteristics primarily reflect a working-age adult passenger base. Figure A-1 illustrates the distribution of commuters and non-commuters during the 2017 survey. The following sections provide demographic information for Vashon Island passengers.

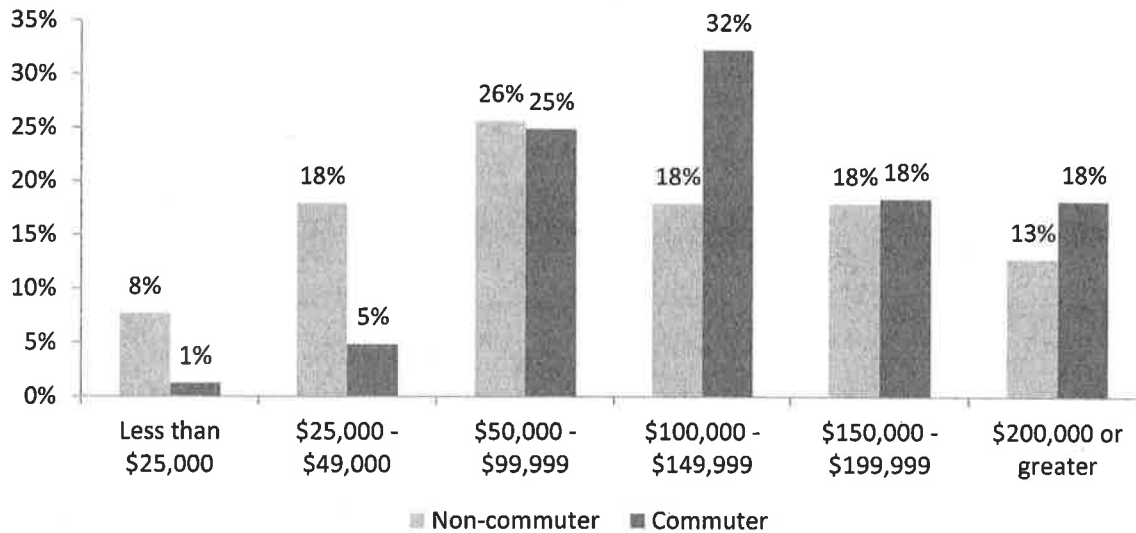
Figure A-1: Distribution of Vashon Island Water Taxi Commute and Non-Commute Passengers



Income Distribution

Figure A-2 compares the household incomes of Vashon Island residents to the income of Vashon Island Water Taxi passengers. Not surprisingly, water taxi passengers have higher household incomes, on average. This would be expected, as the majority of passengers are commuters and therefore employed and earning income. The overall resident population, on the other hand, includes a relatively high percentage of retirees who would be expected to have lower fixed incomes, on average.

Figure A-2: Vashon Island Water Taxi Passenger Income Distribution

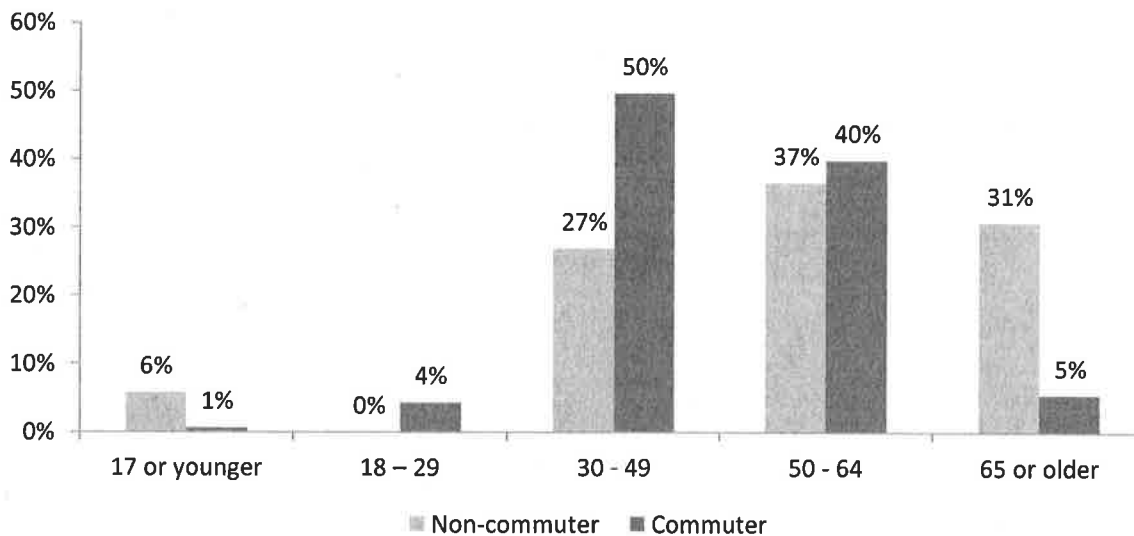


Note: 107 commuters (16 percent) and 25 non-commuters (39 percent) preferred not to answer and are not included in the percentages above.

Age Distribution

Vashon Island passengers are predominately 30 to 49 years old, followed by 50 to 64 years old. While there is a low percentage of non-commuters from Vashon Island, almost a third of them are aged 65 and over. Figure A-3 illustrates the age distribution of both commuter and non-commuter Vashon Island respondents.

Figure A-3: Vashon Island Water Taxi Passenger Age Distribution

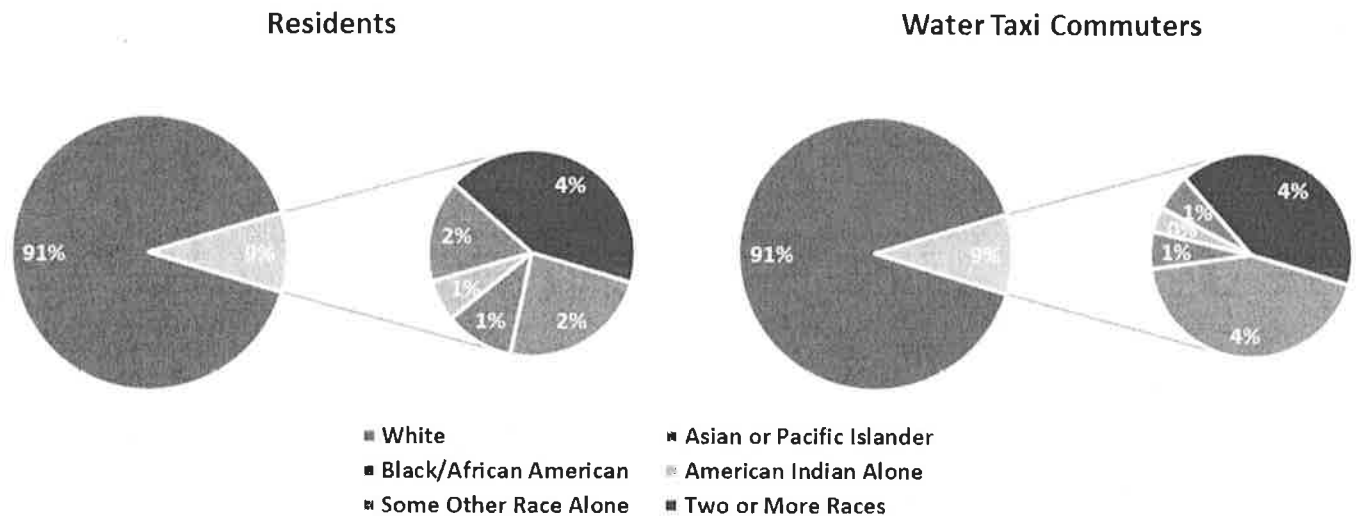


Note: 59 commuters (9 percent) and 12 non-commuters (19 percent) preferred not to answer and are not included in the percentages above.

Race

Vashon Island Water Taxi ridership closely mirrors the Vashon Island resident population with regards to race. However, among water taxi commuters there is a slightly higher percentage that identify as Asian or Pacific Islander when compared to the resident population. Few Vashon Island Water Taxi survey respondents identified as non-commuters, and they too had a similar racial makeup to Vashon residents. Figure A-4 illustrates the comparison between Vashon residents and Vashon Island KCWT commuters.

Figure A-4: Vashon Island Residents Compare to Water Taxi Commuters

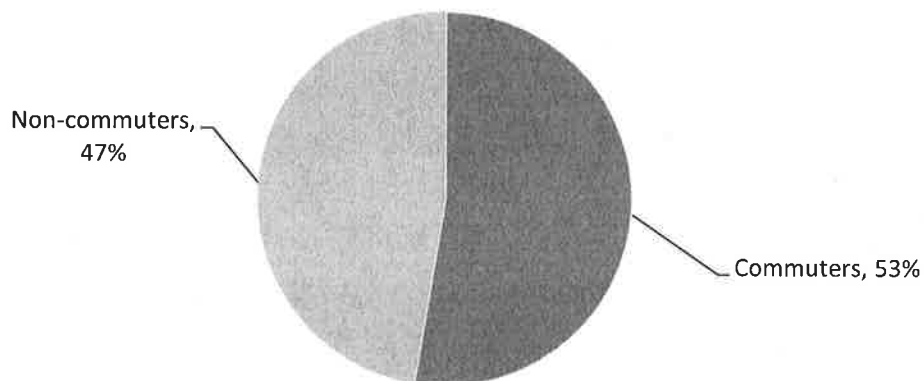


Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2017; KCMD, 2017.

WEST SEATTLE DEMOGRAPHICS

In contrast to Vashon Island service that is commute only, the West Seattle route includes all day, weekend service during the summer months. Therefore, passengers are a mix of commuters and non-commuters, split almost evenly between the two categories. Figure A-5 shows the distributions of commuters and non-commuters on the West Seattle route. The following sections provide demographic information for West Seattle passengers.

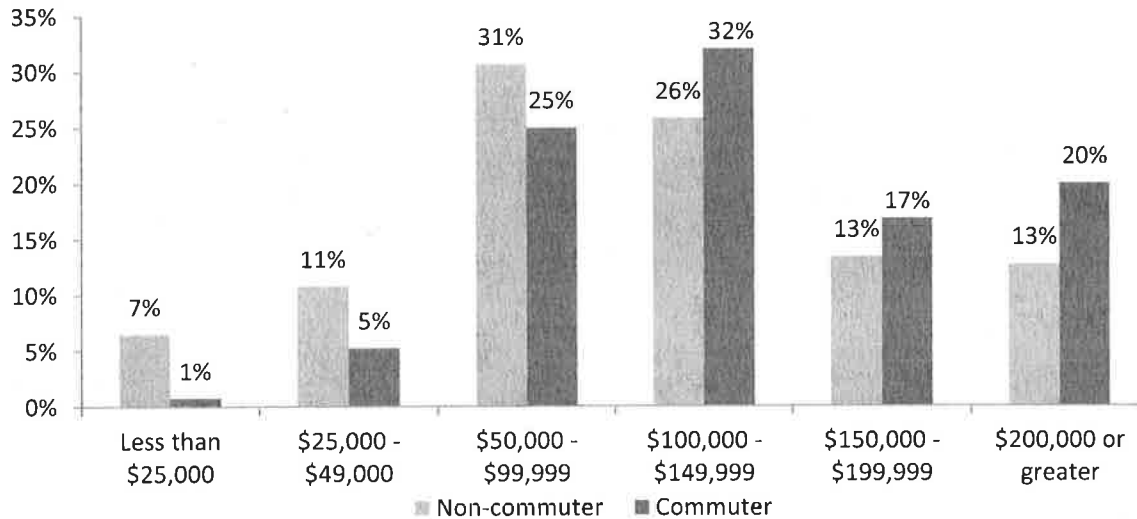
Figure A-5: Distribution of West Seattle Water Taxi Commuters and Non-Commuters



Income Distribution

Figure A-6 presents the income distribution of West Seattle respondents. Among passengers who responded, a majority had household incomes greater than \$100,000. Commuters have, on average, higher incomes than non-commuters. A greater share of non-commuters have incomes below \$50,000.

Figure A-6: West Seattle Water Taxi Passengers Household Income Distribution

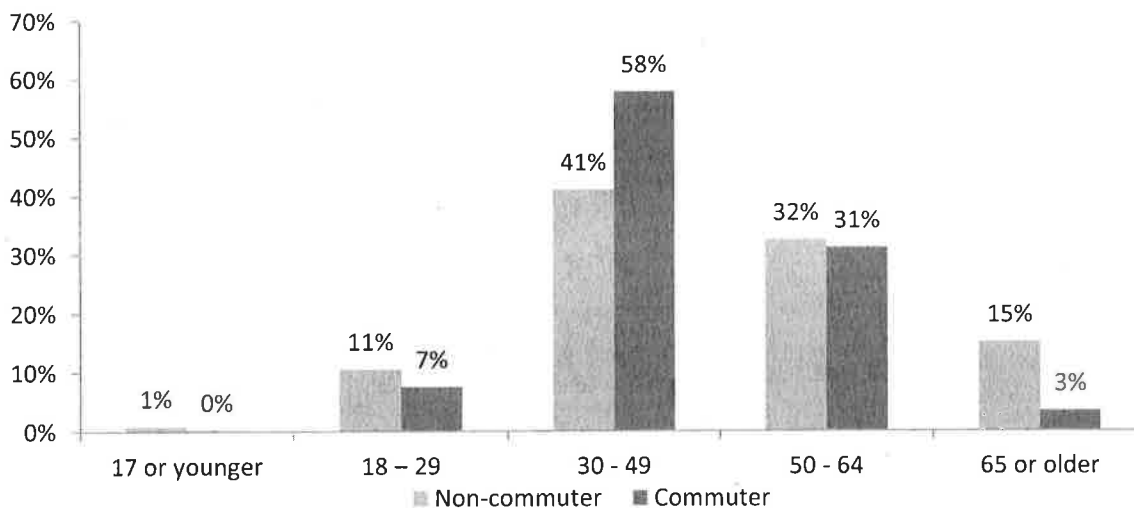


Note: 76 commuters (17 percent) and 92 non-commuters (23 percent) preferred not to answer and are not included in the percentages above.

Age Distribution

The majority of West Seattle passengers during both commute and non-commute periods were 30 to 49 years old, followed closely by those ages 50 to 64. Figure A-7 illustrates the age distribution of survey respondents. The percentage of passengers who are children (17 or younger) is likely to be underestimated by these survey results due to the fact that survey respondents were self-selected and survey takers were not asked to include the ages of all members of their traveling party.

Figure A-7: West Seattle Age Distribution



Note: 42 commuters (9 percent) and 47 non-commuters (12 percent) preferred not to answer and are not included in the percentages above.

Race

Similar to Vashon Island, West Seattle passengers are predominately white. A summary of the racial distribution of the West Seattle service area and Water Taxi commuters is illustrated in Figure A-8. Figures A-9 and A-10 indicate the identified race for commuters and non-commuters. The distribution of passengers by racial identity is quite similar for both commuters and non-commuters.

Figure A-8: West Seattle Residents Compare to Water Taxi Commuter

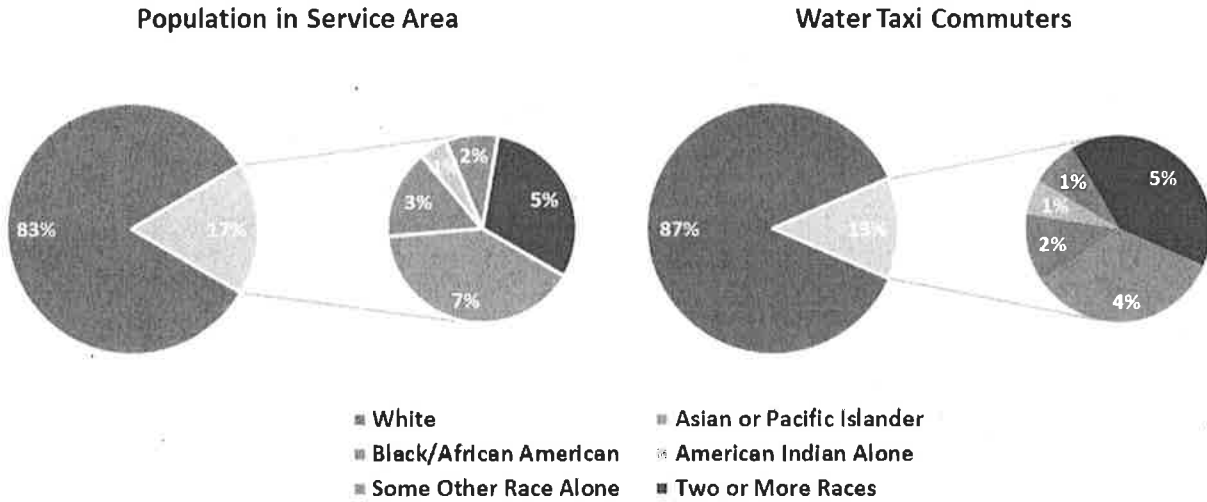


Figure A-9: West Seattle Commuter Identified Race

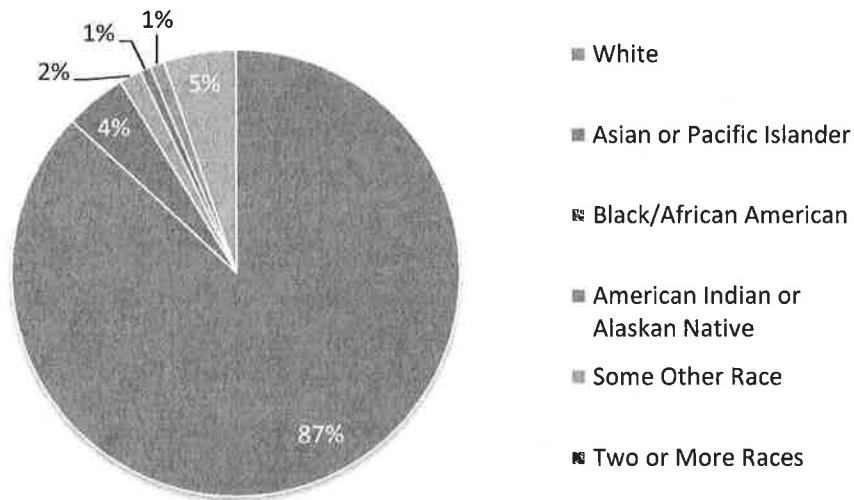
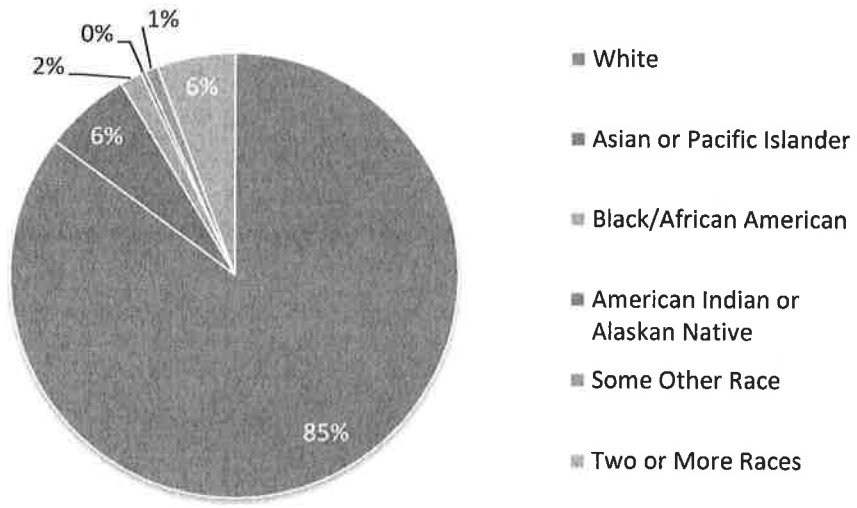


Figure A-10: West Seattle Non-Commuter Identified Race



The King County Marine Division is looking for your help in improving service and planning for the future! Please take a few minutes to complete the following questionnaire. We appreciate your time and participation! If you have any questions, please contact the Marine Division at Watertaxi.info@kingcounty.gov.

1. Is this your first time on the Water Taxi?
 - Yes
 - No

2. Which Water Taxi route are you riding today?
 - West Seattle – Seattle
 - Vashon Island – Seattle

3. What is your typical purpose for riding the water taxi? (If this is your first time on the Water Taxi, what is your purpose for riding today?)
 - Commuting to work
 - Commuting to school
 - Fun/social/recreation
 - Shopping/errands
 - Special event
 - Other _____

4. If you selected “commuting to work” or “commuting to school” in Questions 3, please select where you typically commute? If not, please skip to Question 5.
 - Downtown Seattle (north of Seattle Terminal)
 - Downtown Seattle (south of Seattle Terminal)
 - South Lake Union
 - First Hill
 - Capitol Hill
 - Pioneer Square
 - UW / University District
 - Elsewhere (please specify): _____

5. Where do you live?
 - West Seattle
 - Vashon Island
 - Downtown Seattle
 - Kitsap County
 - Elsewhere (please specify): _____

6. How would you typically get from your home or where you’re staying to the Water Taxi?
 - Drive myself
 - Metro bus
 - Bike
 - CarToGo or ReachNow
 - Washington State Ferries
 - None of the above
 - Carpool
 - Taxi/ride-share
 - Walk

7. During which seasons do you ride this Water Taxi? (check all that apply)
 - Winter
 - Spring
 - Summer
 - Fall

8. During the seasons that you do ride this Water Taxi, how often do you ride?
 - Regularly (3+ days per week)
 - Frequently (1 or 2 days per week)
 - Occasionally (a few days per month)
 - Rarely (a few days per year)

9. If you had not taken the Water Taxi today, how would you have reached your destination?
 - Drive myself
 - Carpool
 - Metro bus
 - Taxi/Ride-share
 - CarToGo or ReachNow
 - Washington State Ferries
 - Walk
 - Bike
 - None of the above (I would not have taken this trip)

10. Why do you choose to ride the Water Taxi? (Please mark "X" to indicate your preference on the options below)

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
I like to enjoy the views					
The terminals are conveniently located					
The fare is reasonable compared to other transportation options					
Shorter travel time compared to other options					
Availability of parking at or near the terminal					
Frequency of Water Taxi service					
Reliability of Water Taxi service (on-time)					
Easy transit connections					
Quality of service/crew					
The ride is comfortable					

11. What changes would help make the Water Taxi a more convenient option for you? (Please choose the two most important changes)

- Year-round expanded service (mid-day, weekends, or evenings)
- Better connections to transit in West Seattle
- Better connections to transit downtown
- More reliable service (boats departing on time)
- More capacity for bicycles
- Better bike routes from the downtown terminal
- Other _____

12. What is your household income?

- Less than \$25,000
- \$25,000 – \$49,999
- \$50,000 – \$99,999
- \$100,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 or greater
- Prefer not to answer

13. Are you of Hispanic, Latino, or Spanish origin?

- Yes
- No
- Prefer not to answer

14. What is your race?

- American Indian or Alaskan Native
- Asian or Pacific Islander
- Black/African American
- White
- Some other race
- Two or more races
- Prefer not to answer

15. How old are you?

- 17 or younger
- 18 – 29
- 30 – 49
- 50 – 64
- 65 or older
- Prefer not to answer

16. How did you hear of the King County Water Taxi?

- Advertising board
- Hotel concierge
- Instagram
- Word of mouth
- Other social media
- Website (not social media)
- Other _____

17. Which two social media platforms do you use most often (write "1" and "2" to indicate your preference)?

- ___ Facebook
- ___ Twitter
- ___ Pinterest
- ___ Other _____
- ___ Instagram
- ___ Snapchat
- ___ Tumblr