



Des Moines, WA, Ferry Pilot  
Evaluation and Alternatives

# Market Analysis

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# INTRODUCTION

## Purpose of a Market Analysis

The purpose of this market analysis is to provide understanding of all travel into and out of Des Moines, and to assess opportunities to enhance travel between areas that display travel connectivity with non-auto modes, including the potential for a passenger ferry, in a way that will enhance economic development opportunities in the city of Des Moines.

Analysis consists of:

- Demographic analysis of the study area
- Travel pattern analysis of work trips and non-work trips starting or ending in Des Moines
- Identification of potential markets for Ferry Service

## Data Sources:

- U.S. Census, ACS 2023 (5-year estimates) for demographic data, consisting of population, race, transit demand, etc.
  - Data is collected at the Block Group level. Block Groups are the second smallest census geography to Blocks, which are the smallest census geographies that are formed by streets, water, or other types of boundaries. Block groups are a combination of census blocks and are the smallest geography for which ACS data is available.
- Replica travel flow analysis (2025) for commuting patterns and destinations.
- King County GIS Center for boundaries, census geographies, land use, etc.
- Puget Sound Consolidated GTFS for all transit service data in the Puget Sound region.

## KEY FINDINGS

- **Population and employment density, when combined with demographic factors, indicate moderate but meaningful underlying transit demand in Des Moines** relative to nearby shoreline cities and communities.
- **Adjusted population density and transit propensity highlight that transit demand in the area between Des Moines and Seattle is concentrated in central urban and employment-focused areas**, specifically in Seattle, SeaTac, and western Kent.
- **Des Moines demonstrates higher transit propensity than many adjacent jurisdictions**, suggesting demographic characteristics that support transit use.
- **Commuter travel to and from Des Moines is oriented toward major employment centers** and takes place during peak travel periods.
- **Non-commuter travel to and from Des Moines is more localized** and distributed throughout the day.
- **Trips between Des Moines and downtown Seattle are limited**, with significantly fewer than 50 trips going from the area within ½-mile of the Des Moines Marina to within ½-mile of Bell Harbor Marina in Downtown Seattle.
- **Key regional travel markets represent opportunities for expanded transit service.** Some of these markets are downtown Seattle, SoDo, SeaTac, and industrial areas in Kent and Auburn, represent opportunity for expanded transit service.
- **There is limited potential for meaningful ferry connections between Des Moines and Seattle** due to the lack of movement between Des Moines and waterfront adjacent locations.

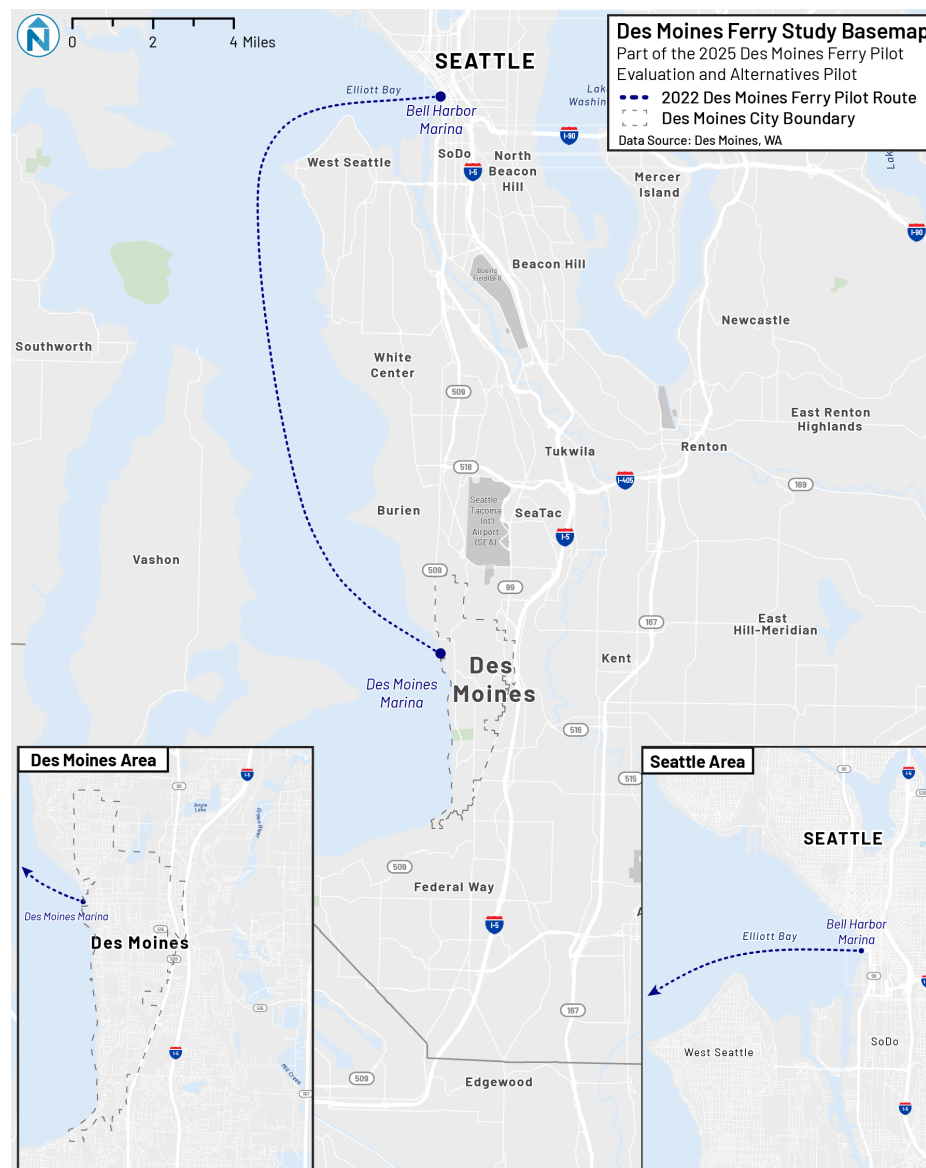


Figure 1 Study Area Map

# TRANSIT AND FERRY NETWORKS

## Transit Network

The Seattle-Tacoma regional transit network is a multi-agency system that provides local, regional, and commuter connections throughout the Puget Sound, including the Des Moines area. The primary service providers are King County Metro, Sound Transit, and Pierce Transit, each offering distinct, interconnected services to major regional destinations.

**King County Metro** operates the core local and regional bus network throughout King County, including routes that serve Des Moines and connect to nearby cities such as Kent, Federal Way, SeaTac, and Seattle. Routes serving Des Moines provide key north-south access along Pacific Highway and link to major transit centers and park-and-ride facilities throughout the southern part of King County.

**Sound Transit** operates regional express bus service (ST Express), commuter rail (Sounder), and light rail (Link) connecting the broader metropolitan area. The Link Light Rail 1 Line has been extended southward to include a Kent Des Moines Station as part of the Federal Way extension, which provides access to Downtown Seattle in 45 minutes, SeaTac Airport in 12 minutes, Federal Way in 5 minutes, and University of Washington (Seattle campus) in 55 minutes.

**Pierce Transit** serves Tacoma and Pierce County with local and regional bus routes, including connections to southern King County in Federal Way and Auburn.

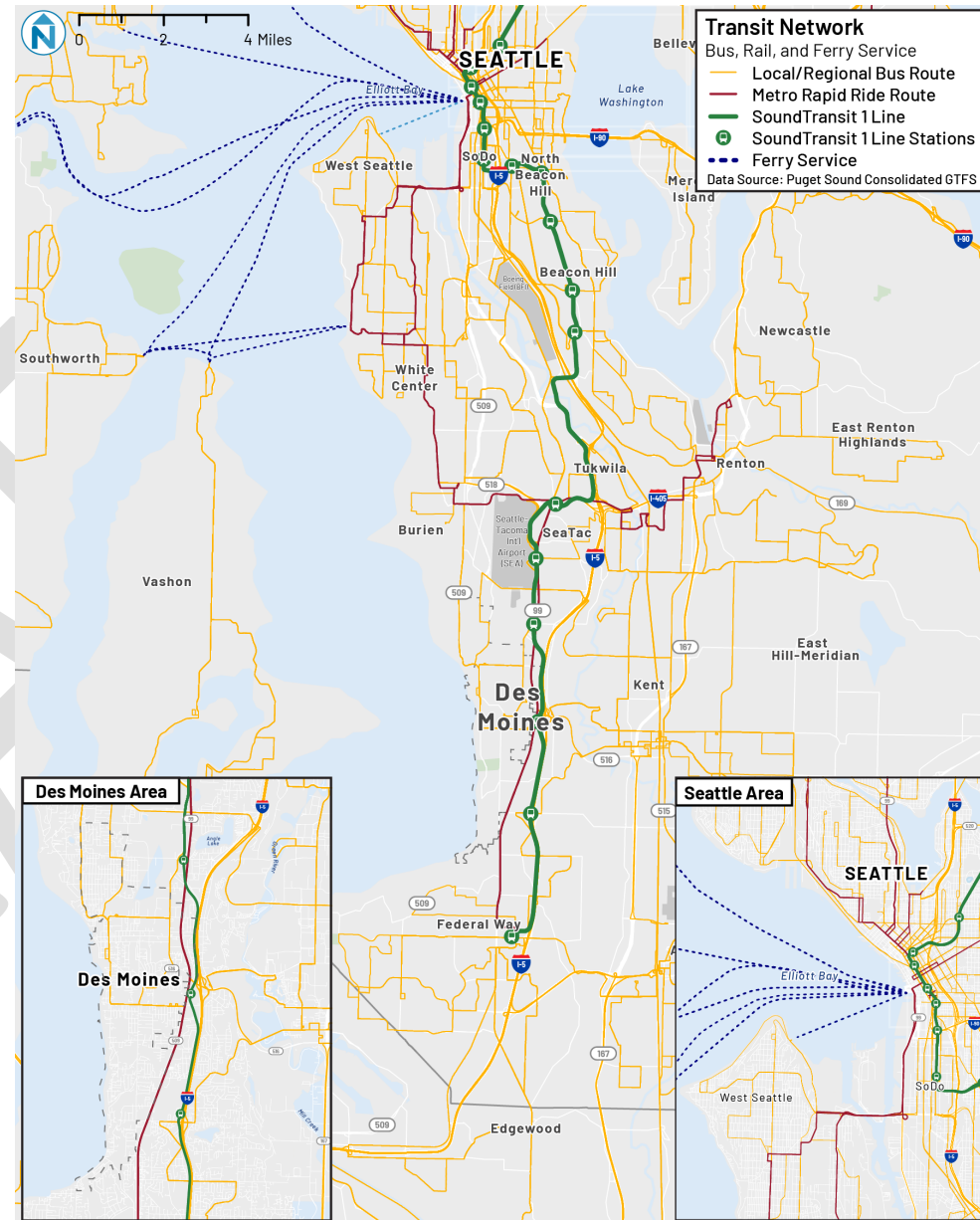


Figure 2 Regional Transit Network

## Ferry Network

Ferry and passenger water transportation services are a key component within the broader Seattle-Tacoma regional transit system, providing cross-Sound and shoreline connections that complement the roadway, transit, and rail networks. Ferry and passenger-only water services provide an alternative travel mode across Puget Sound, offering a reliable option when road or rail travel is congested or limited, and creates access between shoreline communities and the Seattle urban core. Of note, in this network all but one of the present routes, Downtown Seattle/West Seattle being the exception, are cross-Sound. Today, as opposed to when there were few highways, there are no long-distance ferry routes that immediately parallel land-based routes.

**Washington State Ferries (WSF)** is the primary provider of regional ferry service, operating an extensive network of auto and passenger ferries across Puget Sound. WSF routes connect downtown Seattle to Bainbridge Island and Bremerton and provide additional east-west crossings at locations including Edmonds-Kingston, Mukilteo-Clinton, Fauntleroy-Vashon-Southworth, and Point Defiance-Tahlequah. These ferry routes support both vehicle and walk-on passengers and connect to local and regional transit services at various ferry terminals, creating multimodal trip opportunities between urban centers and island or peninsula communities.

**King County Water Taxi**, operated by King County Metro, is a passenger-only water transit service between downtown Seattle and West Seattle, as well as to Vashon Island.

**Kitsap Transit** operates a network of passenger-only fast ferries connecting downtown Seattle with Bremerton, Kingston, and Southworth, offering higher speed crossings than traditional auto ferries.

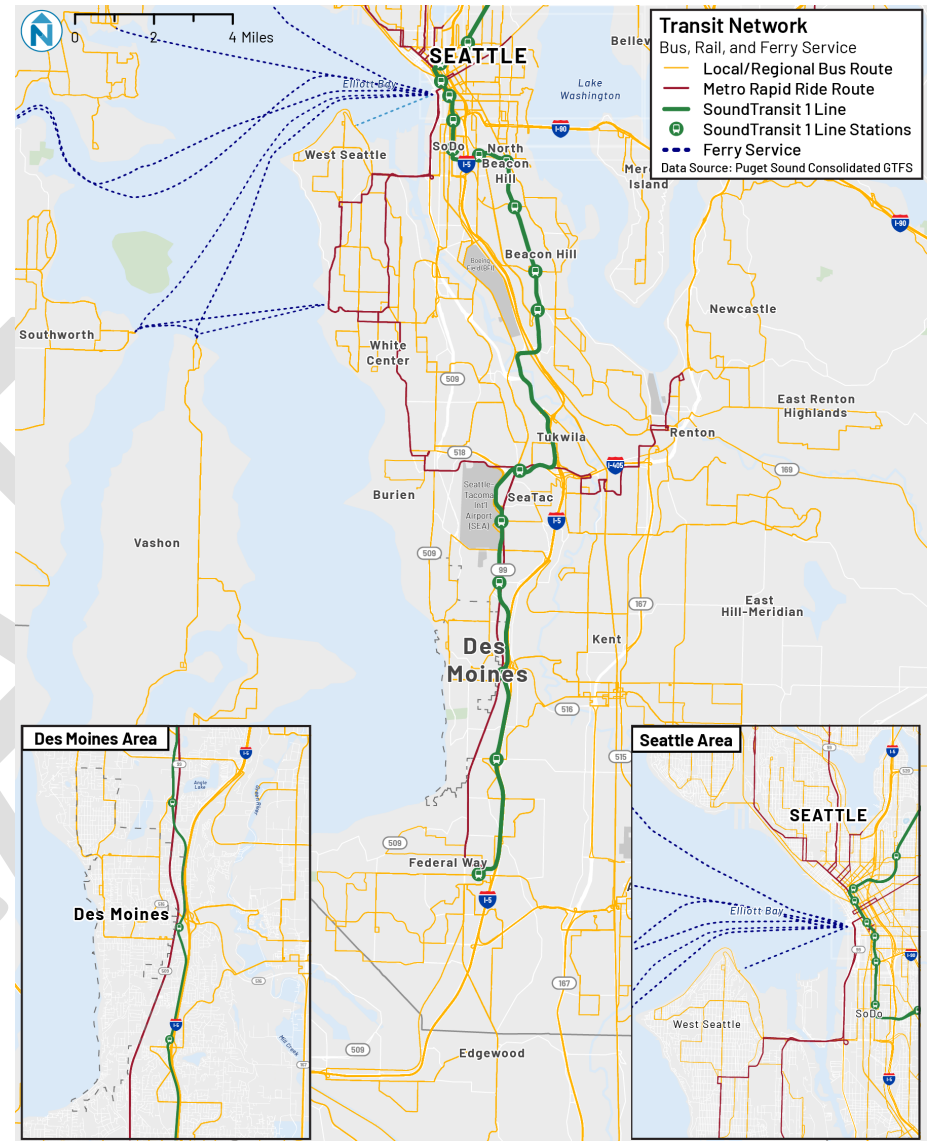


Figure 3 Regional Ferry Network

# TRANSIT DEMAND ANALYSIS

**Underlying transit demand is strongly related to the following factors, discussed in detail in this chapter:**

**Population and Population Density:** Transit relies on having more people near service, and a higher population density makes it feasible to provide higher levels of service.

**Socioeconomic Characteristics:** Different people have a different likelihood of using transit, with differences related to socioeconomic characteristics. For example, households with no cars are more likely to use transit than those with one or more.

**Job Types and Employment Density:** Job density, like population density, is a strong indicator of transit demand, as traveling to and from work often accounts for the most frequent type of transit trip. On a further level, the type of job also influences who travels there and whether it is just employees, such as to an office building, or also customers, clients, patients, or students.

**Travel Patterns:** People use transit to get from one place to another. Understanding where, when, and why people travel is important for assessing the market for transit.

The combination of population and employment density is the best determinant for transit demand. When combined, these two factors create a composite demand, which can help determine the level of service that is best suited to the area.

When composite demand is compared to travel patterns, areas that have high volumes of connected travel patterns along with high composite demand are areas where transit is more likely to be successful.

## How does Passenger Ferry Service Fit into Transit Demand?

Passenger ferry service shares characteristics with transit modes that offer direct point-to-point connections with limited opportunities for passengers to board or alight between termini. This includes modes such as gondolas and limited-stop, express bus service. These service types offer riders a direct route to a destination that may otherwise have an obstruction preventing connection for most travel. These modes can often utilize faster paths of travel, many times with a competitive advantage over other modes. For example, passenger ferries can often connect two ports directly and overcome a geographic barrier that prevents connection for travelers otherwise.

However, this operating model also requires a strong travel demand connection between the two termini, as these modes do not allow for boardings along the course of the route. Passenger ferries are much more costly than many modes and are often difficult to implement. Therefore, to be operationally sustainable, ferry routes need to generate all of their ridership between the two termini.

The catchment area for ferry ridership can be large, like other high-investment transit modes, but is contingent upon several factors, including travel time savings, convenience, frequency, and service reliability. To be an attractive option for riders, ferries must be competitive with other modes across these factors. In Des Moines, several transportation linkages with Seattle exist or are in development, including: I-5, King County Metro's Rapid Ride service, and Sound Transit's Link service. For a Des Moines passenger ferry to be operationally sustainable, it must be competitive with the other available options.

## Passenger Ferry Feasibility Considerations

When considering the feasibility of a passenger ferry, there are two primary aspects to consider: demand for the service and the physical siting of terminals.

### Demand

- Combination of several factors, including:
  - strength of travel market
  - travel time
  - convenience
  - cost
- Ferries may have a faster trip time than alternatives, but if service is less convenient, alternatives may be more competitive. Ferry travel times between Des Moines and downtown Seattle are approximately 35 minutes, whereas Sound Transit's Link completes a similar trip in 45 minutes. Despite the slower travel time, Link will be more convenient/competitive due to its higher frequency, 7-8 minutes during peak times, in comparison to a ferry with a trip every 1-2 hours.
- Strong market between two destinations to be successful. Because ferries operate over water, they cannot easily board/alight passengers mid-trip to increase or supplement demand.

### Terminals

- Proximate to shoreline activities. Trips that require transfers or long walks to destinations will be less attractive than trips that are next to key destinations.
- Tidal current and water depths factor into terminal siting as well as shelter from rough waters and weather.
- Located in areas where ferry activity does not impede other activities, natural and human.


























LAND USE			TRANSIT		
Land Use Type	Residents per Acre	Jobs per Acre	Appropriate Types of Transit	Frequency of Service	Other Modes
 <b>Urban Mixed-Use</b>	<b>&gt;30</b>	<b>&gt;15</b>	    Light Rail/Streetcar   BRT   Express Bus   Local Bus	 <b>15 minutes or better</b>	 Rail  Land Use and Frequency Varies   Passenger Ferry
 <b>Neighborhood &amp; Suburban Mixed-Use</b>	<b>15-30</b>	<b>10-15</b>	  Express Bus   Local Bus	 <b>15-30 minutes</b>	
 <b>Mixed-Density Neighborhoods</b>	<b>10-15</b>	<b>5-10</b>	   Express Bus   Local Bus   Micro-Transit	 <b>30-60 minutes</b>	
 <b>Low Density</b>	<b>2-10</b>	<b>2-5</b>	   Micro-Transit   Rideshare   Volunteer Driver Pgm	 <b>60 mins or less, or on-demand</b>	
 <b>Rural</b>	<b>&lt;2</b>	<b>&lt;2</b>	  Rideshare   Volunteer Driver Pgm	<b>On-demand</b>	

Figure 4 Supported Transit Service by Land Use and Densities

# Population Density

Population density is a high-level indicator for areas that are well-suited for transit service. Higher-density environments tend to support land use patterns that are more compatible with transit and are generally associated with higher potential ridership. Densely populated areas are often more walkable, less auto oriented, and have lower parking availability, all of which reduce the convenience of owning a vehicle and therefore increasing the likelihood of transit use.

The Puget Sound region, overall, reflects moderate to high population densities, particularly along major corridors and in urban centers. South of the Seattle municipal boundary, population densities along the water typically range from 2 to 15 people per acre, indicating a mix of suburban and urban development.

Within Des Moines, population density is generally lower to moderate, with most areas having between 2 and 10 people per acre. However, there are several localized pockets with higher densities, ranging from 10 to 15 people per acre, and up to 15 to 30 people per acre. Seattle, on the other hand, exhibits the highest density within the region, where most block groups exceed 45 people per acre.

To the south of Des Moines, Federal Way displays higher population densities than Des Moines, overall. These conditions suggest stronger underlying market characteristics for transit services in those areas, particularly where higher-density development is paired with supportive land use and infrastructure.

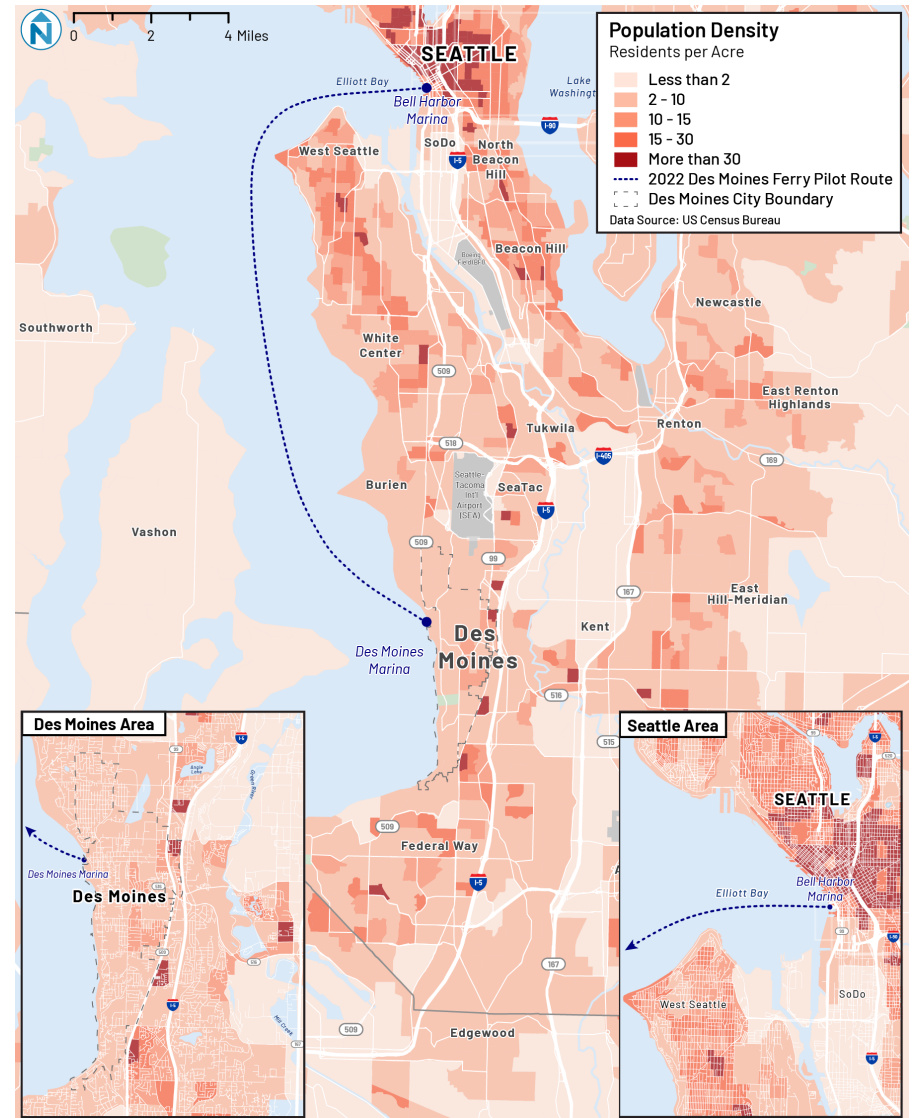


Figure 5 Population Density

## Socioeconomic Characteristics and Transit Propensity

Underlying transit demand is influenced by population and employment densities, but both the socioeconomic characteristics of the people within the populations also influences transit demand. Transit propensity is determined using census reporting on mode share. This allows comparisons to be drawn between the total population of each demographic group and the mode share of each demographic group. Groups that report higher transit use will be reflected with a higher transit propensity than those who report lower transit use.

In lower density areas, clusters of people with multiple strong transit propensity characteristics can reveal higher transit demand than density alone would suggest. On the other side, in places where transit supportive demographics are underrepresented, transit demand may be lower than the population and employment densities alone suggest.

### Who is most likely to take transit to work?

Based on the comparison of the 2023 US Census American Community Survey to the 2020 Decennial Census, a further refinement of understanding key demographic characteristics of who rides transit is possible. This adjustment of socioeconomic characteristics using the more granular ACS data allows for better understanding of how different populations of people utilize transit service. For example, residents that are Black (not Hispanic) were most likely to report transit use relative to other race and ethnicity groups in King County. White residents reported transit use that is below the average. Other races and ethnicities reported average levels of transit use.

Table 1 Transit Propensity Values

Demographic Group	Relative Transit Propensity
<b>Race and Ethnicity</b>	
White (not Hispanic)	0.88
Black (not Hispanic)	1.73
Asian (not Hispanic)	1.12
Other Race (not Hispanic)	0.99
Hispanic	1.00
<b>Vehicle Ownership</b>	
No Car	3.71
One Car	1.33
Two Cars	0.67
Three or More Cars	0.46
<b>Country of Origin</b>	
Native-born	0.98
Foreign-born	1.04
<b>Household Income</b>	
Less than \$15,000	1.32
\$15,000 - \$50,000	1.21
\$50,000 - \$65,000	0.99
More than \$65,000	0.85

Residents without a car are nearly three times more likely to use transit than people with one car, and five to six times more likely to take transit than those with two, three, or more cars.

Based on country of origin, there is a nominal difference between transit usage and whether a resident is foreign-born or native-born.

Among income groups, households that are making less than \$15,000 are 32% more likely than average to take transit. Households with incomes up to \$65,000 are about just as likely as average to take transit. Households with income higher than \$65,000 are least likely to take transit, by about 15% less than average.

### Transit Propensity Factor

The Transit Propensity Factor (TIF) represents the relative likelihood of transit use compared to the average resident in the study area. Values greater than 1.0 indicate populations that are more likely than average to use transit, while values below 1.0 indicate below average transit use.

Transit propensity is generally average or below average in Des Moines, meaning that residents are less likely to use transit than average within the region. Des Moines does exhibit higher transit propensity than some nearby cities do, such as areas in Burien and north Federal Way, but still remains at or below average relative to the region.

Areas located along the shoreline generally display below-average transit propensity. Despite proximity to some regional destinations, the demographic and employment composition of these water adjacent areas are less likely to generate transit demand.

The industrial area on the western side of Kent stands out as having some of the highest inland transit propensity values in the region, even though it falls within the lowest population density categories. This shows that travel to and from major employment centers, such as this one, can be a key transit demand driver.

Seattle has the highest concentrated transit propensity, and specifically among shoreline areas. This indicates that residents are substantially more likely to use transit relative to residents elsewhere, ultimately

reflecting the combined influence of higher-density development, job density, and transit-favorable demographic characteristics.

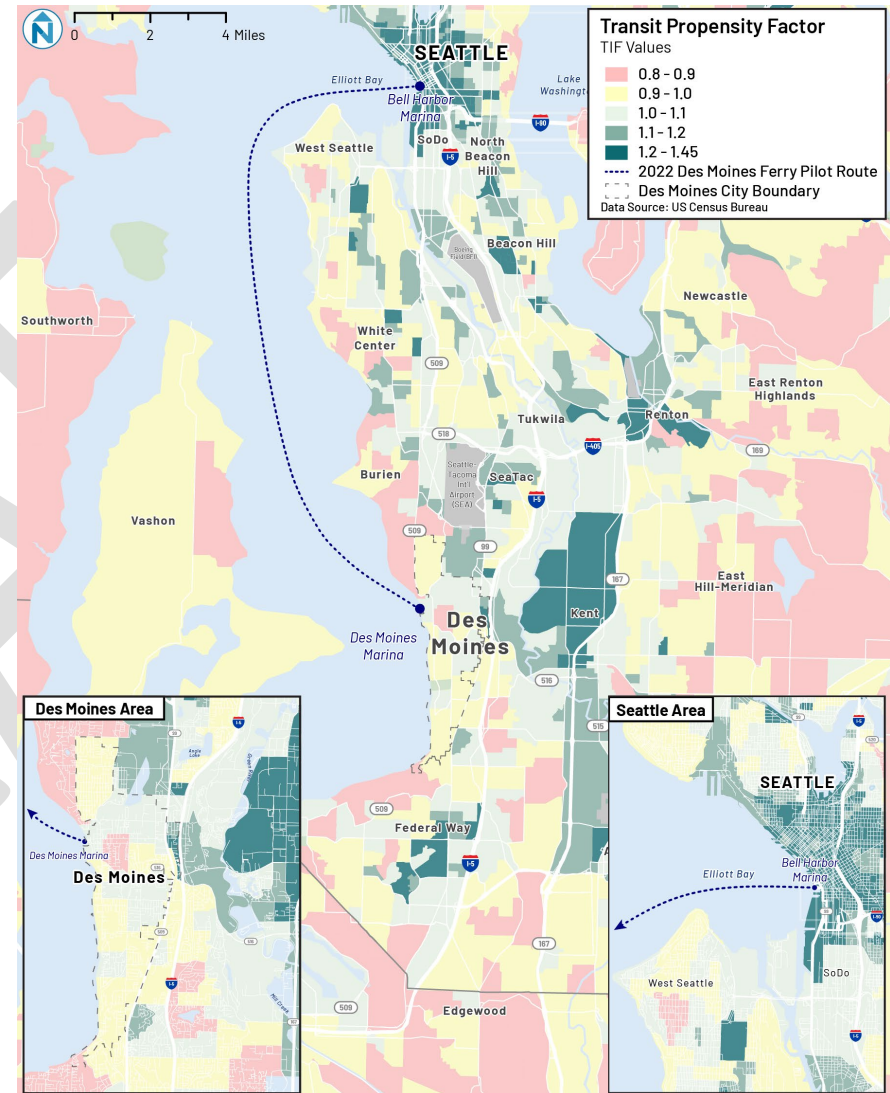


Figure 6 Transit Propensity Factor

## Adjusted Population Density

Adjusted population density provides a more nuanced indicator of underlying transit demand by accounting for both population density and demographic characteristics. It is calculated by multiplying population density by the Transit Index Factor (TIF). When these demographic factors are considered alongside population density, areas with characteristics supportive of transit tend to exhibit higher underlying demand, while more auto-oriented or dispersed areas show comparatively lower demand.

Across the region, adjusted population density is highest in downtown Seattle, with consistently elevated values also observed in West Seattle, North Beacon Hill, and Beacon Hill, where densities exceed 15 people per acre. Other areas of high adjusted population density are distributed throughout the study area, most commonly in downtown areas, near major employment centers, or corridors along major roadways.

In Des Moines, inland areas west of I-5 and east of Pacific Highway exhibit relatively high adjusted population density, indicating stronger underlying transit demand relative to surrounding neighborhoods. In contrast, water adjacent areas between South Seattle and Tacoma generally do not exhibit high adjusted population density, with most areas falling within the 2 to 10 people per acre range. This pattern suggests that transit demand in this area is more strongly concentrated in inland urban areas rather than along the shoreline.

Areas experiencing the greatest increases in density as a result of the adjustment are typically those that already have moderate to high population density. The TIF adjustment amplifies these conditions, further highlighting places such as SoDo, West Seattle,, and Renton as locations where demographics meaningfully increase underlying transit demand.

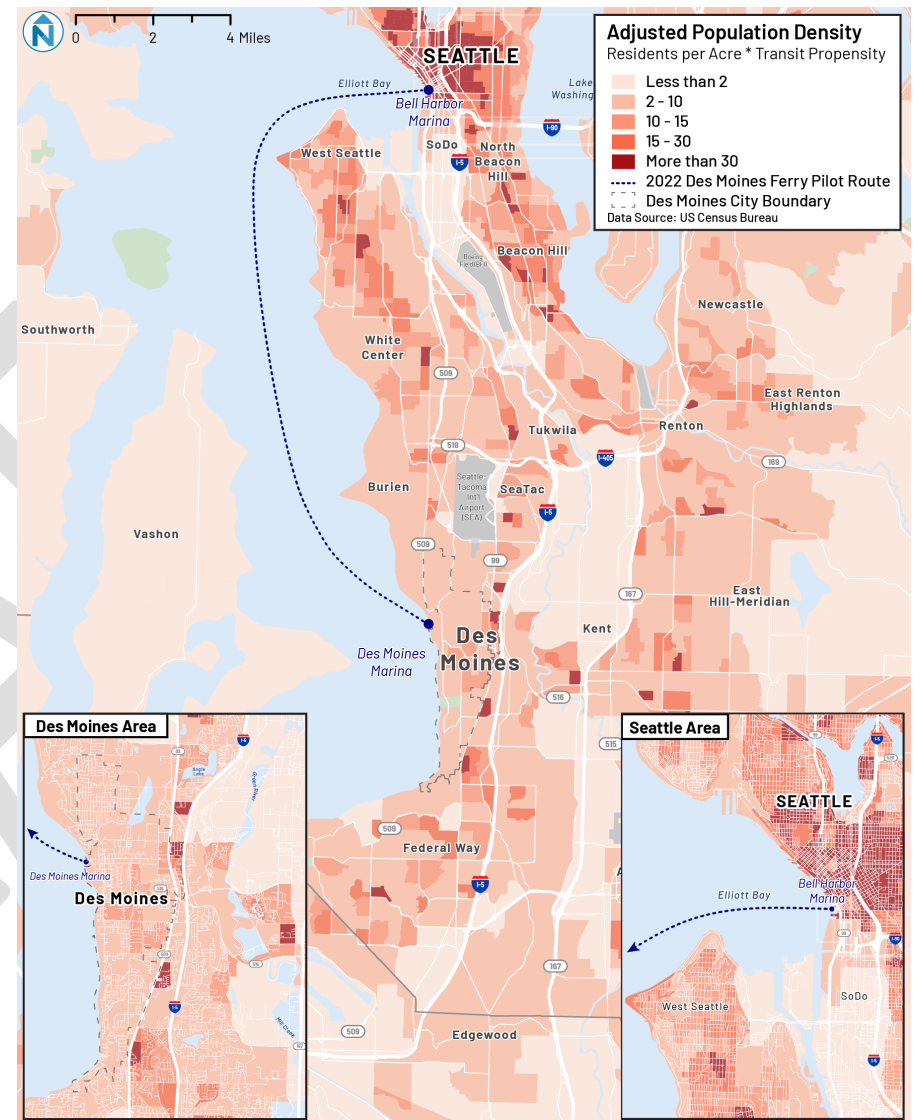


Figure 7 Adjusted Population Density

## Adjusted Employment Density

Employment density is also a key indicator of transit demand and an important complement to population-based measures. Employment density is representative both of where people work and where people travel to access goods and services such as customers, clients, patients, students, or visitors. Adjusted employment density weights jobs with customers, clients, patients, students, or visitors more highly than jobs without. Therefore, areas with high adjusted employment density often generate both commuter and non-commuter travel demand.

The relationship between adjusted employment density and transit demand varies by land use type. Employment centers such as industrial or warehouse districts and office buildings primarily function as destinations for workers, therefore generating strong peak-period travel demand. On the other hand, employment such as retail, healthcare, education, and civic services typically supports a broader range of trips and more evenly distributed travel throughout the day.

Within the Des Moines and Seattle region, employment is most heavily concentrated in downtown Seattle. Tacoma, the SeaTac Airport area, Federal Way, and the western industrial part of Kent also have more heavily concentrated employment areas. Areas along the shoreline that would have easy access to a ferry terminal, except for Seattle, do not have high enough employment density nearby to generate significant transit demand.

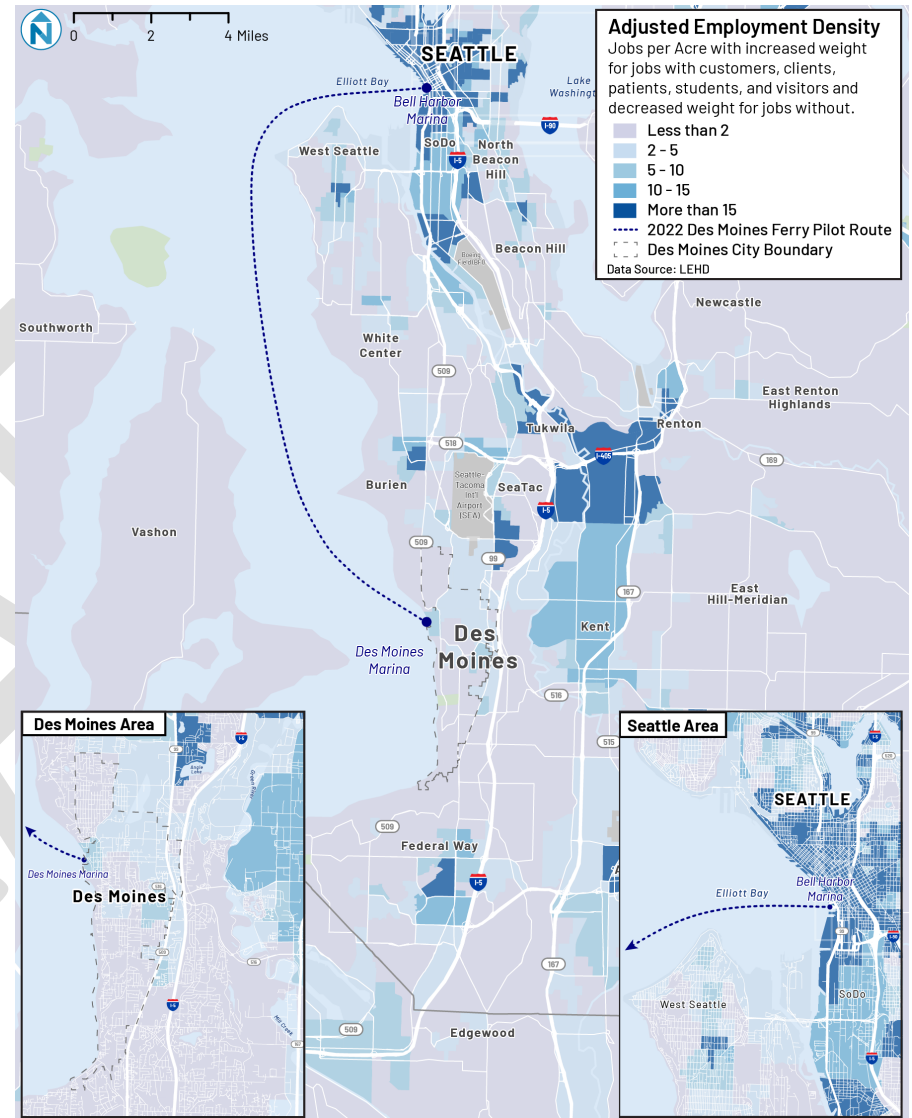


Figure 8 Adjusted Employment Density

## Composite Demand

Composite transit demand captures the latent demand for transit in an area and is calculated by combining adjusted population density and adjusted employment density (adjusted for jobs with customers, clients, patients, and students). These two factors, when combined, provide a composite demand score that can be translated into a level of transit service that is appropriate for the context. However, it is important to note that high composite demand does not always equal high propensity. Areas with high population or employment density and low propensity might still have high composite demand.

Areas shown in dark brown and orange—suburban or urban mixed use—can support higher levels of transit service, meaning 15-minute or better service. Areas in light brown or tan—rural or low density—indicate areas that don’t have the population or employment density to justify high levels of service, so services like on-demand or hourly service are most appropriate for that context.

Des Moines’ composite density shows support of 60-minute service, with some areas supporting 30- or 15-minute or better service. Throughout the region, high composite demand areas are typically in densely populated urban centers and major employment centers, most of which can be found inland as opposed to along the shoreline.

- **Downtown Seattle** has the highest composite demand in the Des Moines-Seattle area.
- **West Seattle** has high composite demand along and nearby the bay, specifically in Downtown West Seattle, North Admiral, Seaview, and Fairmount Park.
- **SeaTac**, has high composite demand, specifically in the area abutting the airport on the eastern and northern sides which are locations of upwards of 15-minute or better transit service.

- **Kent’s** northwestern industrial area is the largest high-density employment area outside of Seattle and has good composite demand due to its high employment density.

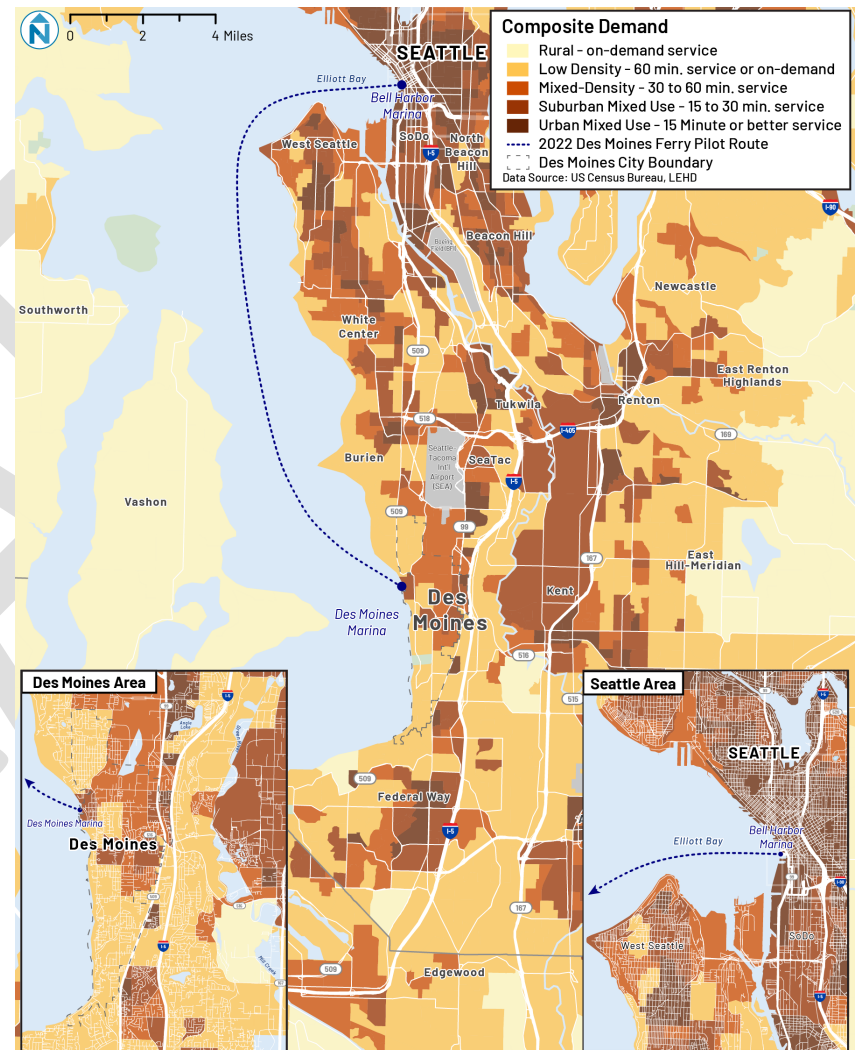


Figure 9 Composite Demand

## Travel Pattern Analysis

Travel pattern analysis shows where people are traveling to, when they are traveling, and for what purpose they are traveling. This analysis is for all modes, inclusive of transit and non-transit modes, and utilizes Replica one-way trip data to and from Des Moines during Spring 2025 and is calibrated for volume using LEHD 2022 employment data.

Replica is an activity-based travel model that simulates where residents, visitors, and commercial vehicle travel happens in an area on a typical day. Replica data is grounded in multiple private and public source data, including data from personal mobile devices, demographic data from public and private sources, and credit transaction data for consumer spending. Replica data is best for understanding where, how, and for what purpose people are traveling, but is not best suited for volume, which is why LEHD data is used to properly calibrate the volumes.

## Travel Patterns

Work trips and non-work trips differ in locations traveled to, time of trip taken, trip duration, and trip distance. Work trips are generally longer in both time and distance but occur less often than non-work trips.

On an average weekday, 82,000 non-work trips and 18,000 work trips are taken to and from Des Moines. Work trips travel an average of 10.5 miles, which is 3.6 miles farther than non-work trips (6.9 miles). Duration of travel time is consistent with the differential in trip distance, with trips taking 20.3 minutes, 6.5 minutes longer than a non-work trip.

The highest volume of trips to and from Des Moines occurs at 7:00 AM, where the hourly total exceeds 10,000. More than 2,000 hourly trips take place every hour between 5:00 AM and 8:00 PM, indicating high travel volumes throughout the day and not just in the peak periods.

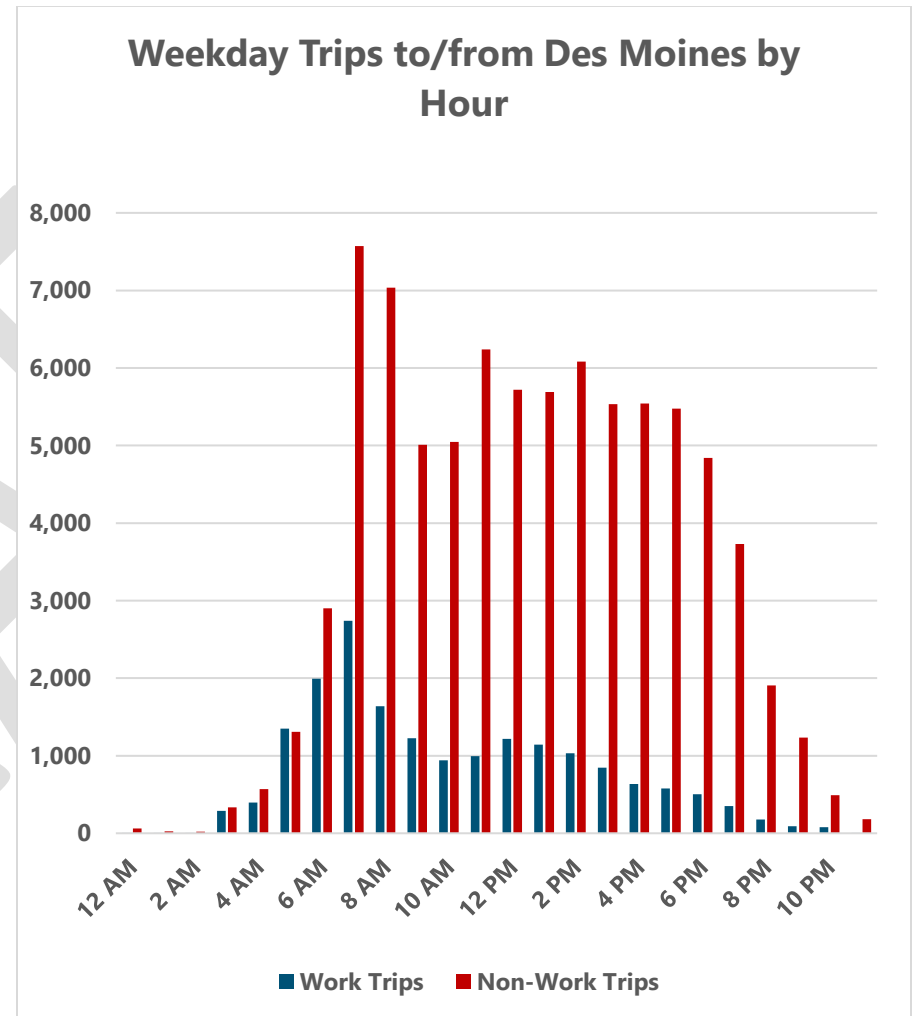


Figure 10 Weekday Trips to/from Des Moines by Hour

## Commuter Patterns (Work Trips)

Commuter travel within the region is characterized by strong directional flows between residential areas and major employment centers. This section details one-way trips to work, meaning that the trip from home to work is included, but the trip from work to home is excluded. This improves the accuracy of this analysis, as it is difficult to accurately attribute trips returning home.

Key commuter markets for Des Moines include the SeaTac Airport area, the industrialized areas of northwest Kent and northwest Auburn, the SoDo district south of downtown Seattle, and localized commute travel within Des Moines. These destinations show that more people are traveling to places nearby Des Moines for work as opposed to into Seattle. Those that do travel to Seattle generally stay on the southern end of the city and in SoDo, with few commute trips heading north of downtown.

Commuter trips generally align with traditional peak travel periods, with the highest volume occurring between 5:00 AM and 8:00 AM. Private automobile travel accounts for 65% of all work trips, amounting to approximately 1,600 daily work trips to/from Des Moines.

### Commuter Trips to Des Moines

Commuter trips to Des Moines are lower in volume than commuter trips from Des Moines. Figure 11 shows where people who end up in Des Moines are traveling from. Most commuter trips to Des Moines originate in Des Moines itself. Excluding those trips that start in Des Moines, the other location of high trip volumes is in western Renton and southern Tukwila, which is just east of SeaTac. Very few trips to Des Moines originate north of the aforementioned Renton/Tukwila area, with less than 25 trips originating in any block group north of that area.

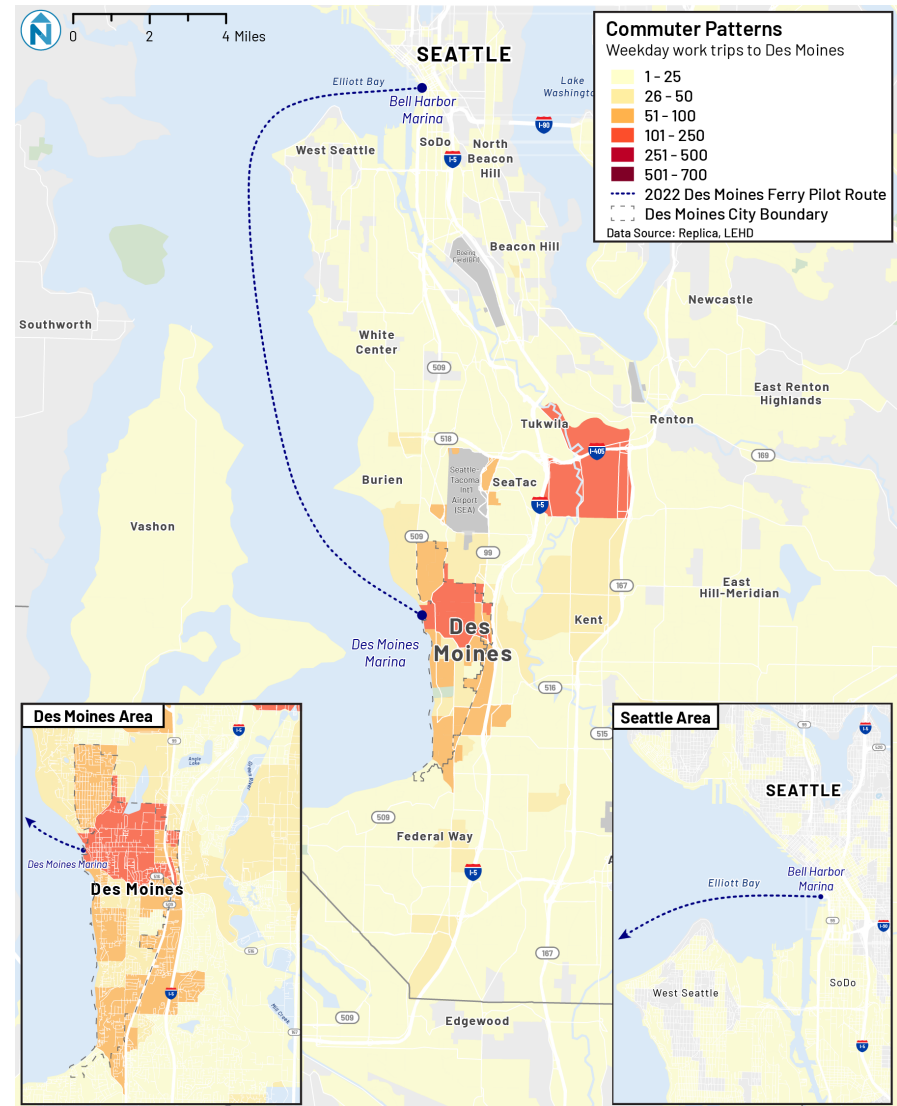


Figure 11 Commuter Trips Ending in Des Moines

### Commuter Trips from Des Moines

Commuter trips originating in Des Moines are higher in volume than those that are traveling to Des Moines. There are more areas that are noteworthy travel locations from this perspective compared to work trips heading to Des Moines. Notable areas for commute travel originating in Des Moines are the industrial area in Kent, which has between 500 and 700 daily commute trips, and Sodo, west Renton, and South Tukwila which each have between 251 and 500 daily commute trips.

Trips from Des Moines to downtown Seattle are not as common as many other local trips, with most areas in Seattle having under 50 daily trips. The specific travel pattern between the area within 1/2-mile of the Des Moines Marina and the area within 1/2-mile of the Bell Harbor Marina in downtown Seattle has fewer than 50 daily trips, indicating that there is not high demand for a trip between those two specific locations. Those traveling into Seattle are more likely traveling to parts of Seattle that are south of downtown, like SoDo, as opposed to downtown and north.

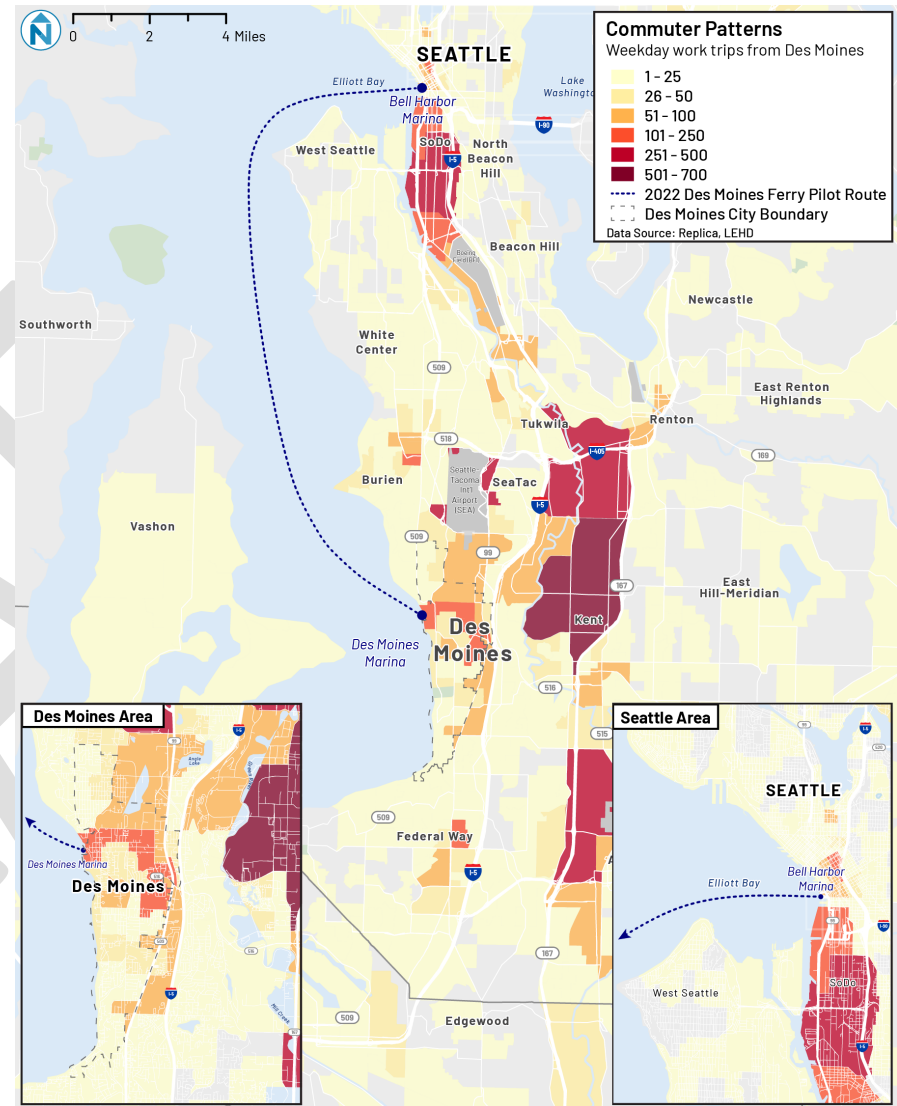


Figure 12 Commuter Trips Starting in Des Moines

## Non-Work Trips

Non-commuter travel shows a more dispersed and time-flexible pattern compared to work trips. These trips occur throughout the day, particularly between 7:00 AM and 7:00 PM, rather than being concentrated in peak periods. This pattern reflects a range of trip purposes, including shopping, services, and social or recreational travel.

Non-commuter travel follows many of the same geographic patterns as commuter travel, such as to places like SeaTac, Kent, Federal Way, and SoDo. These trip patterns show that local circulation is very important for Des Moines residents. Non-work trips north of SeaTac are less common, and very few non-work trips are taken to Seattle.

Non-Work trips are four to six times higher in volume than work trips throughout the day. While traditional commuting patterns are relevant, the volume of non-work trips displays demand for all-day service.

### Non-Work Trips to Des Moines

Non-work trips to Des Moines originate from local areas. Similar to the work trips to Des Moines, most non-work trips originate in Des Moines itself. SeaTac also has a high-volume of non-work trips, with between 1,000 and 2,500 daily trips. The industrial area on the western side of Kent along with the southern Tukwila and western Renton area each has between 500 and 1,000 daily trips.

There are hardly any non-work trips to Seattle, even areas such as SoDo, which showed higher travel volumes have relatively few trips. Downtown Seattle especially has less than 100 originating trips to Des Moines from each downtown block group.

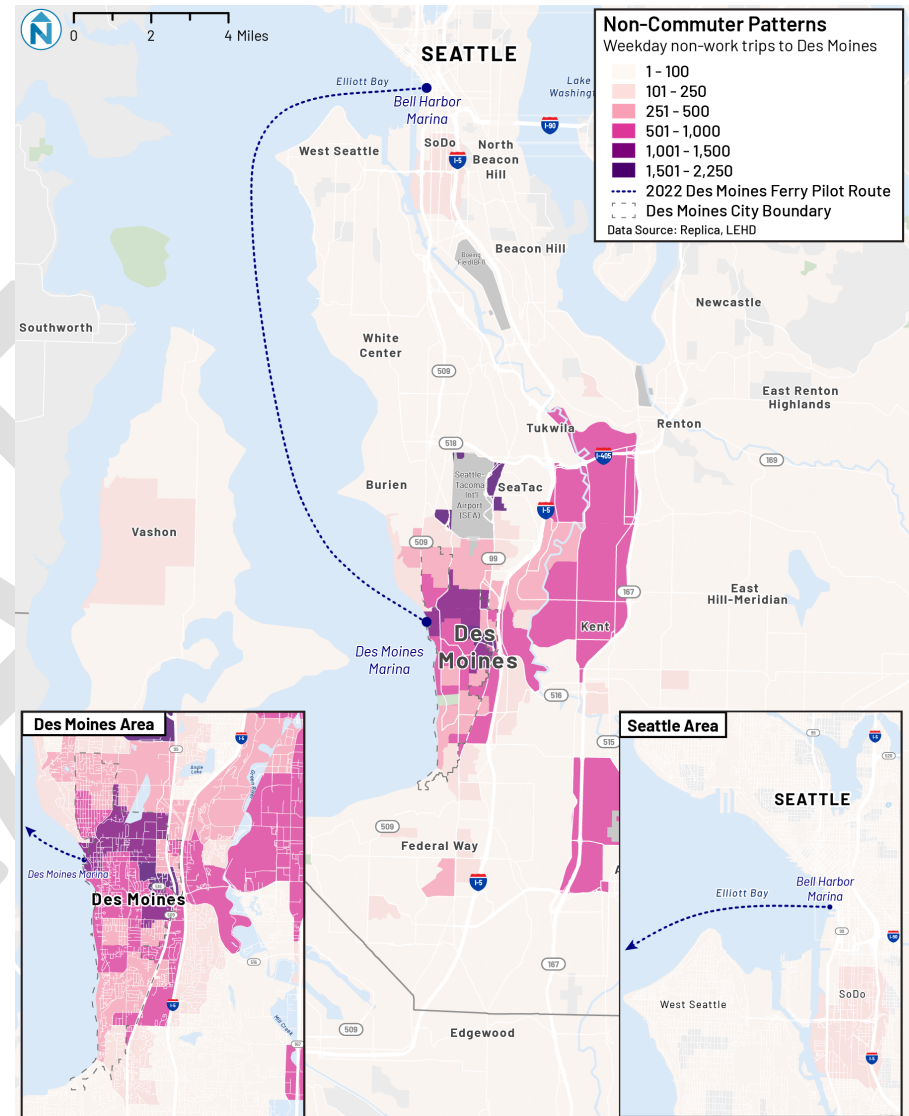


Figure 13 Non-Work Trips to Des Moines

### Non-Work Trips from Des Moines

Non-work trips originating in Des Moines have similar travel patterns to work trips traveling to Des Moines, with most trips starting and ending in Des Moines. Areas in Des Moines have travel volumes that fluctuate by area between 100 and 2,250.

Like travel patterns to Des Moines, travel starting in Des Moines and ending in areas north of SeaTac are limited, with nearly all block groups having less than 100 daily non-work trips besides a few exceptions, like in SoDo, Beacon Hill, and south of downtown Seattle where between 101 and 250 daily trips occur.

Trips originating in the western Renton and southern Tukwila areas have increased travel volumes compared to trips to Des Moines, with daily trip volumes between 1,501 and 2,250. This is an industrial area, but also one with high densities of jobs involving customers, clients, patients, students, and/or visitors. This means that in addition to high volumes of commuters, high volumes of non-commuters will travel to this location too.

Trips that start in Des Moines and end in downtown Seattle are limited, with all areas north of Bell Harbor Marina having fewer than 100 daily trips, indicating that non-work travel demand for getting to Seattle is not high enough to justify transit that accommodates this specific travel pattern.

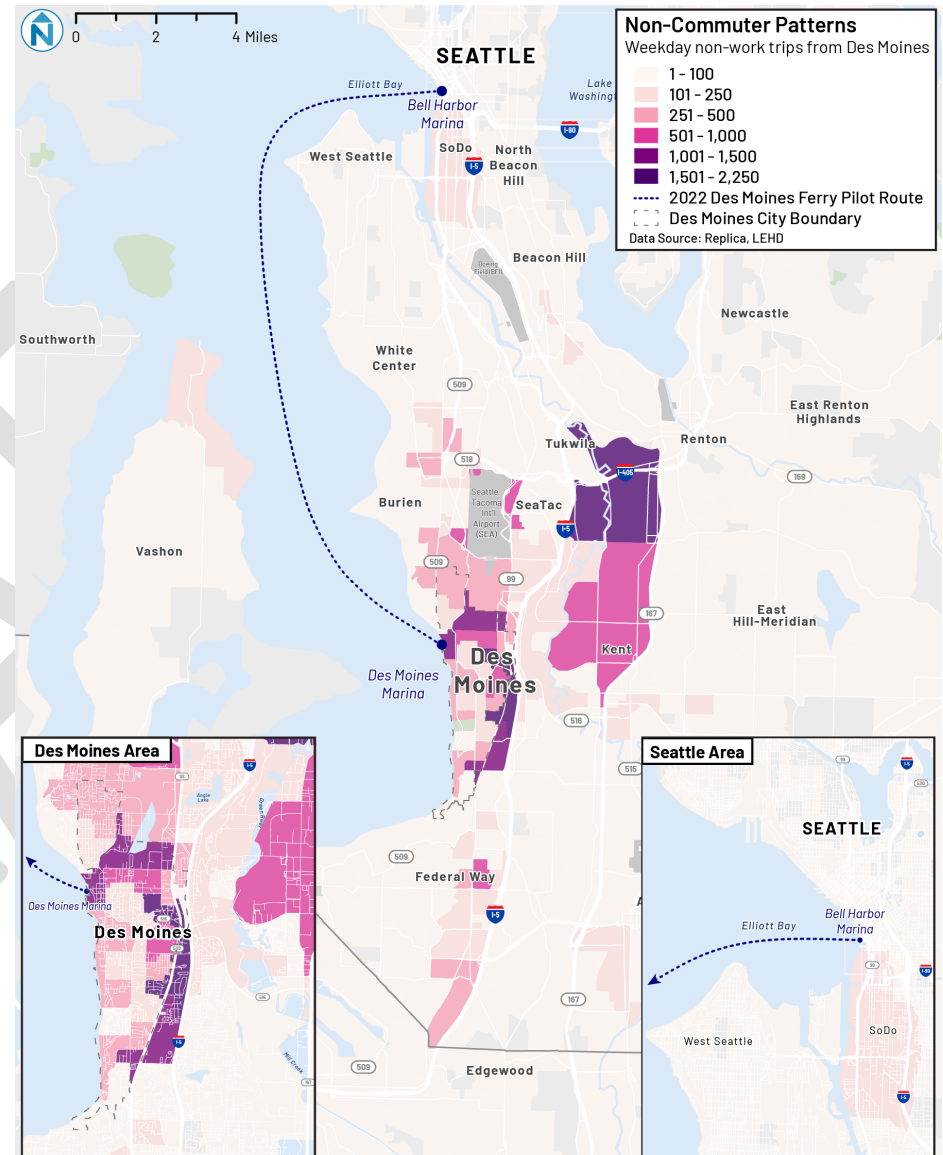


Figure 14 Non-Work Trips from Des Moines

# SUMMARY AND FERRY MARKET OPPORTUNITIES

## Summary

This analysis evaluated transit market conditions in the Des Moines area within the broader Puget Sound context, with a focus on population and employment density, transit propensity, composite density, and travel patterns. These indicators suggest that Des Moines has meaningful underlying transit demand relative to nearby areas when demographic characteristics, job access, regional travel patterns, and composite demand are all considered together.

The travel pattern analysis highlighted several key nearby areas that consistently generate demand, including SeaTac, industrial centers in Kent and Auburn, SoDo, and local Des Moines travel. These patterns underscore the importance of providing both peak and off-peak local service options.

The Federal Way extension of Sound Transit's 1 Line created a Kent Des Moines Station, which will greatly help residents travel between Seattle, SoDo, SeaTac, Des Moines, and Federal Way in an efficient manner. Des Moines residents can now get to downtown Seattle in 45 minutes from the Kent Des Moines Station, which is only

With the expansion of Sound Transit's 1 Line, Des Moines is served locally by three Link stations: Angle Lake Station, Kent-Des Moines Station, and Star Lake Station. Angle Lake and Star Lake both include more than 1100 parking spaces each, and Kent-Des Moines includes more than 500 parking spaces, offering easy regional access for commuters not wanting to drive regionally.

10 minutes longer than the travel time of the Des Moines ferry that ran in 2022. ST's 1 Line operates every 8 minutes, which contributes an overall faster travel time a ferry.

Even though the ferry was 10 minutes faster, its frequency being every two hours would make trip planning much less flexible than the light rail, which offers trips approximately every 10 minutes during the day and 15 minutes in the early morning and evening; missing a ferry trip has a much greater impact on travel time than missing a light rail trip.

## Ferry Market Opportunities

Today, Des Moines does not have high enough transit demand for ferry service and trips based into or out of Des Moines remain relatively local and do not exhibit high volumes of travel north of SeaTac. Des Moines also has existing transit options to get to nearby employment centers and into Seattle. With this understanding, there is no current potential for a ferry market between Des Moines and Seattle today.

The ideal conditions for a ferry service originating in Des Moines would involve connections to high-density employment centers where travel to and from Des Moines already occurs at meaningful levels. While there are numerous employment areas within the region that have travel demand, most are not located along or near the shoreline. As a result, ferry service would have limited ability to meaningfully influence travel patterns to and from these inland locations.

The clearest opportunities for effective ferry service are connections to downtown Seattle. However, these areas are well served by existing transit, particularly by Sound Transit's 1 Line. A ferry could offer a competitive and potentially more convenient alternative for certain users that are traveling directly into downtown Seattle, but it is unlikely to be a more convenient option than the transit options that are already available.

Des Moines does have the ability to build a transit market for a future ferry, but this will require significant effort and time to build the conditions that would support long-term ferry operations, including significant residential and commercial development of Des Moines' marina to create a destination that draws interest regionally. The City of Des Moines would need to consider these investments as part the city's broader goals to determine if developing a ferry market is a priority.