



MARKET
& OPINION
RESEARCH
SERVICES

Washington State Transportation Commission

Telephone Survey of Freight
Shippers
June 2014



Methodology

- ▶ Telephone survey of Freight Shippers on WA State Ferries
- ▶ May 19th – 22nd, 2014
- ▶ 101 total interviews
- ▶ Respondents were screened to meet the following criteria:
 - Be the person responsible for scheduling freight trips on ferries for the trucks in their fleet.
 - Use WSF to transport goods and services by truck.
- ▶ Interviewing conducted by trained, professional interviewers

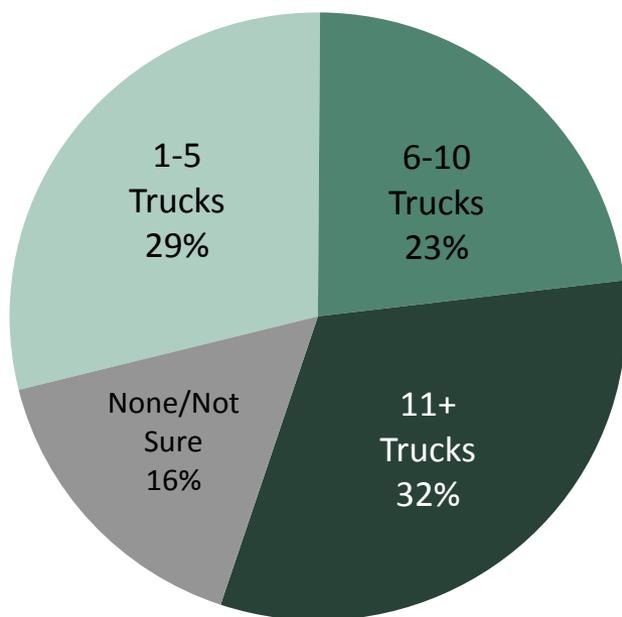
Please note that due to rounding, some percentages may not add up to exactly 100%.

Fleet Profile

The average fleet size is 47 including UPS's fleet of 3,500 trucks and 17 without UPS. Just over half of customers (52%) have 1-10 trucks in their fleet and a third (32%) have 11 or more. On average, just over half of the trucks in a fleet use Washington State Ferries. Of the trucks that use WSF, 46% are under 40 feet in length and 74% are under 60 feet.

Size of Truck Fleet

(n=124)



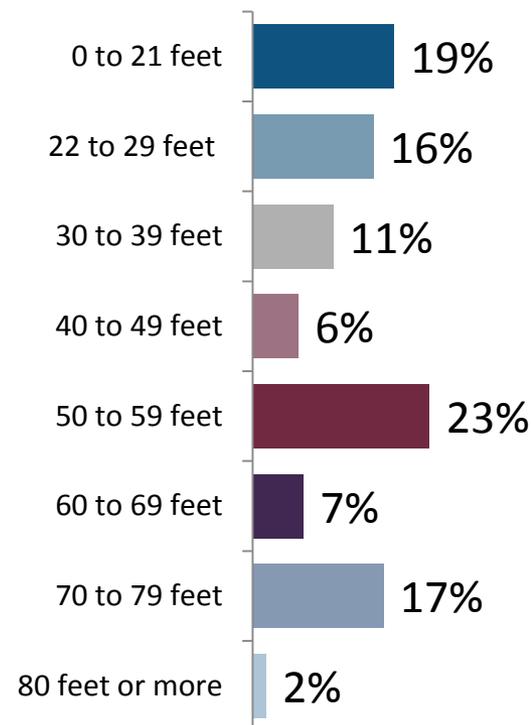
Mean: 47.1 (17.3)*

*without UPS



Size of Trucks Traveling on WSF

(n=101)



Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

Q3. And how many of those trucks use Washington State Ferries? Again an estimate is fine.

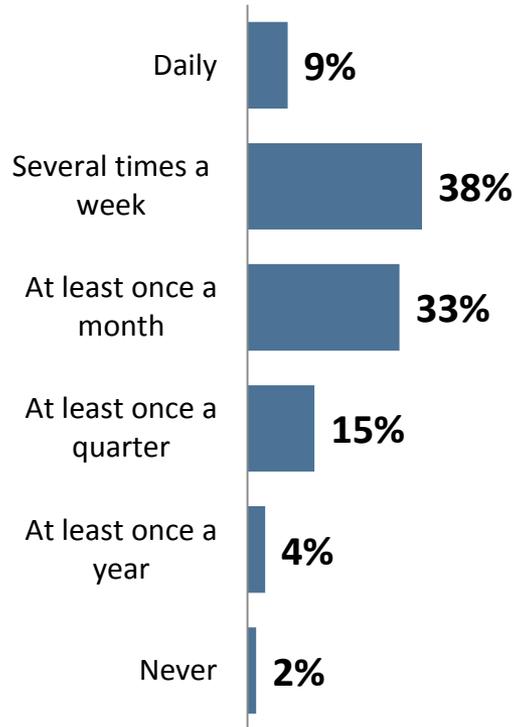
Q9. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories?

[IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

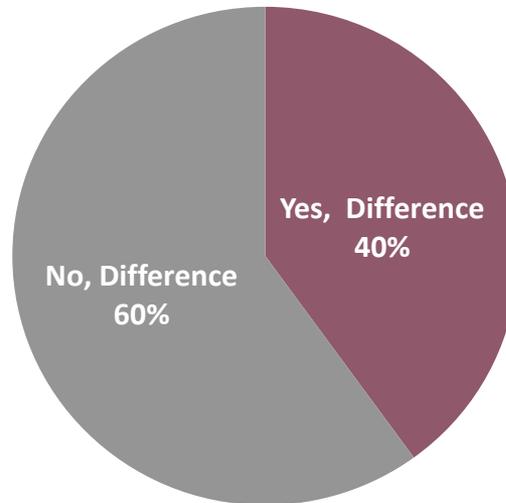
Ferry Usage

Almost half of freight customers (47%) use WSF at least weekly – this is down from 60% in 2012. For those whose trips vary by season (40%), they average 30 spring/summer trips compared to 23 fall/winter trips. Companies whose freight trips are consistent year round average 18 trips per month.

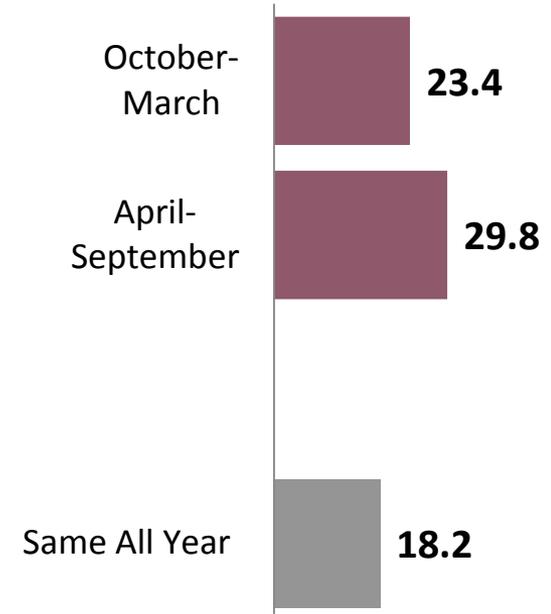
Frequency of Ferry Trips



Truck Crossing - Seasonal Difference



Average Number of Trips by Season

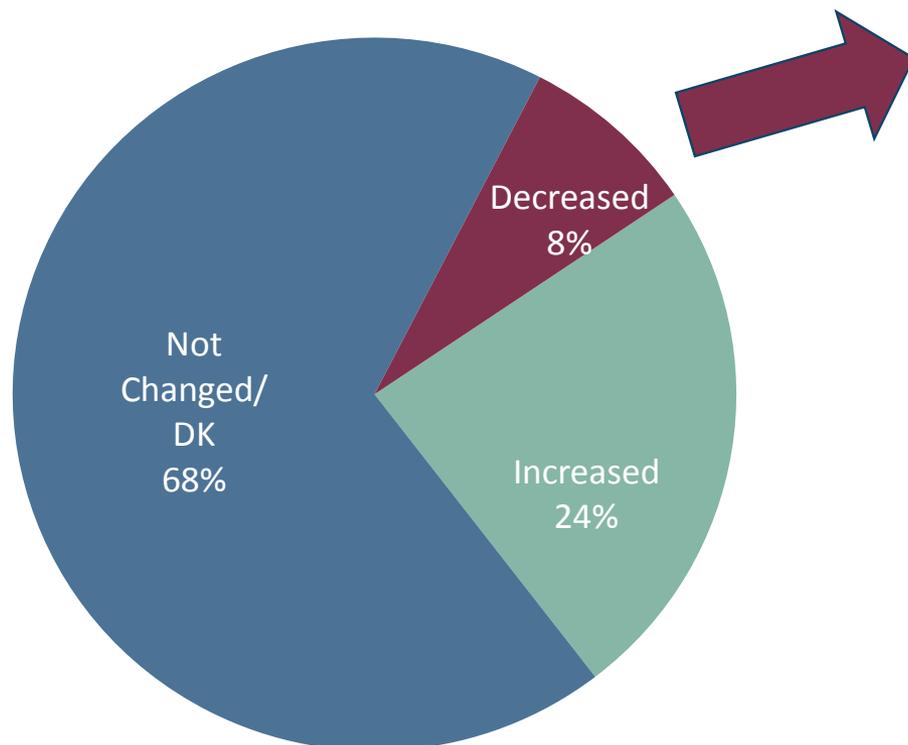


Q4. How frequently do you use the Washington State Ferry system to transport goods and services by truck?
 Q5. Is the average number of ferry crossings made by your trucks different October through March than April through September?
 Q6/Q7/Q8. And, approximately how many one-way crossings are made by your trucks in a typical month from **October through March**, April through September, and in a typical month. Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

Travel Behavior

The majority of companies say frequency of ferry use has not changed, with a quarter increasing and 8% (n=8) decreasing frequency. Of the 8 companies whose trips decreased, 3 mentioned changes delivery schedules and 1 mentioned that their trucks now drive around instead of taking the ferry.

Frequency of Ferry Use
(n=101)



Top Reasons for Decrease (n=8)

Change in Delivery Schedule/Delivering less often (n=3)

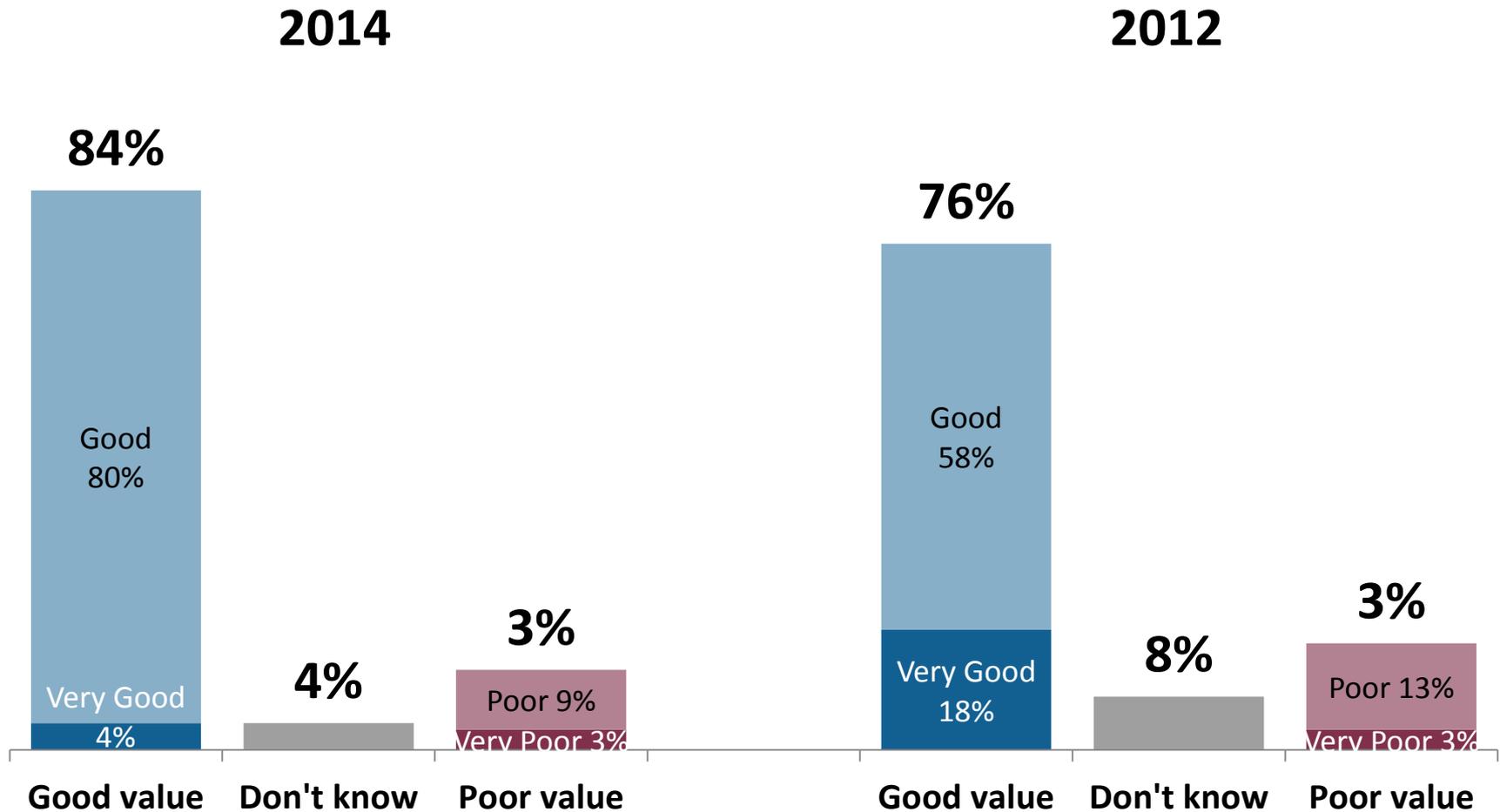
Drive around instead of using ferry (n=1)

Q49. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?

Q50. What is the primary reason for the decrease?

Value Perception - Comparison

Overall, the perception of WSF as a good value has increased from 2012 to 2014. However, the intensity has dropped, as fewer people find it to be a 'very good value' and more people find it to be a 'good value'.

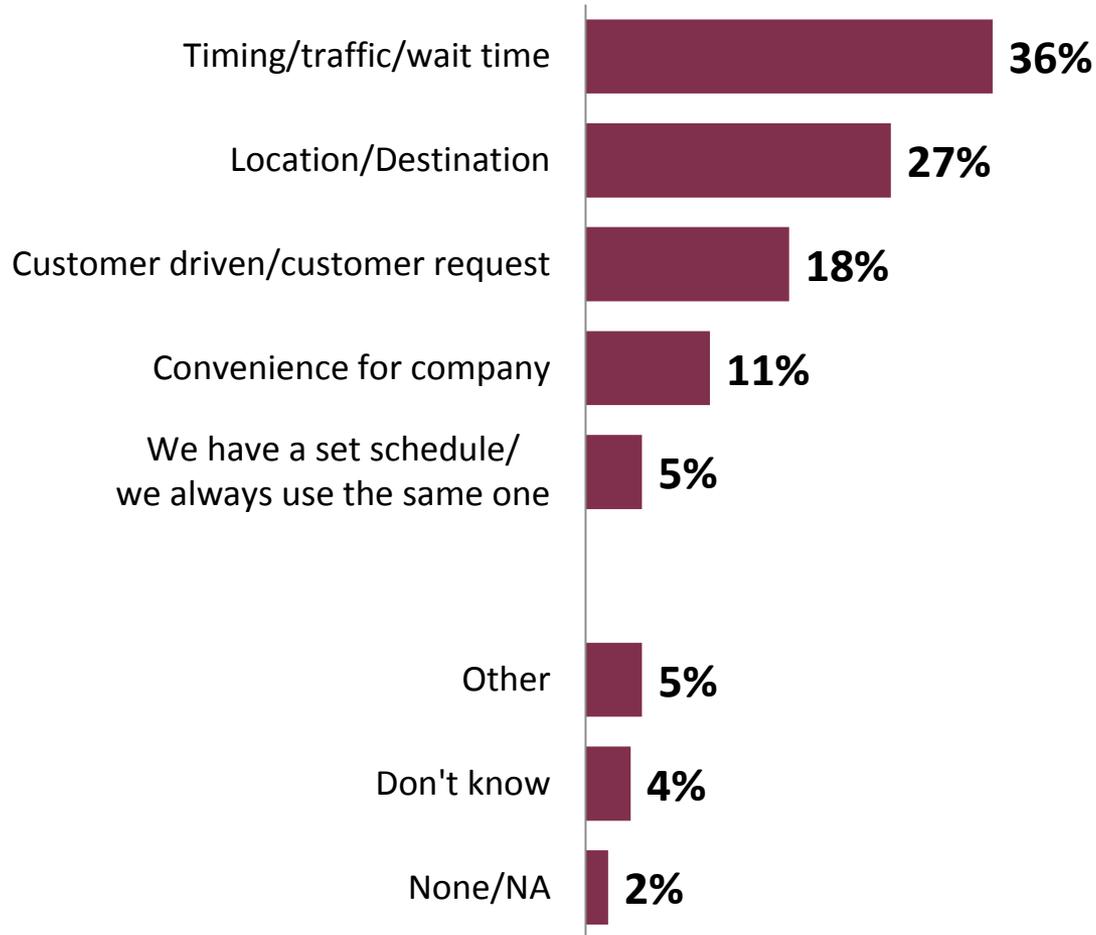


Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

Travel Behavior Influences

Timing/traffic/wait has the greatest impact on sailing decision closely followed by location/destination.

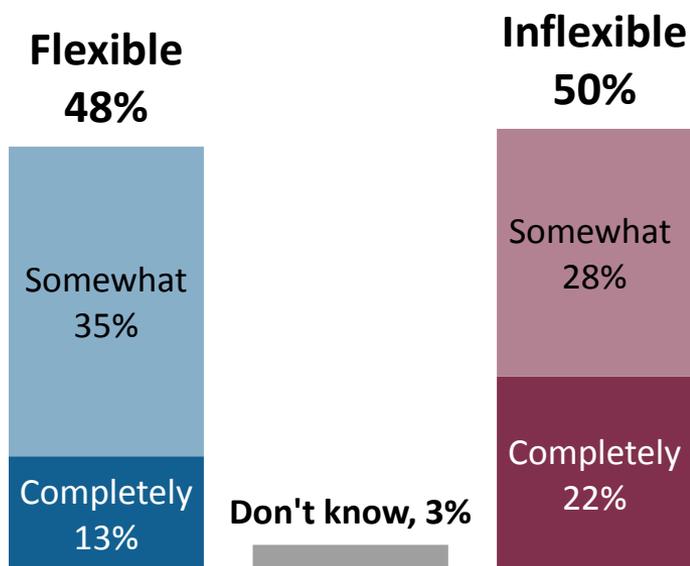
Factors Influencing Decision



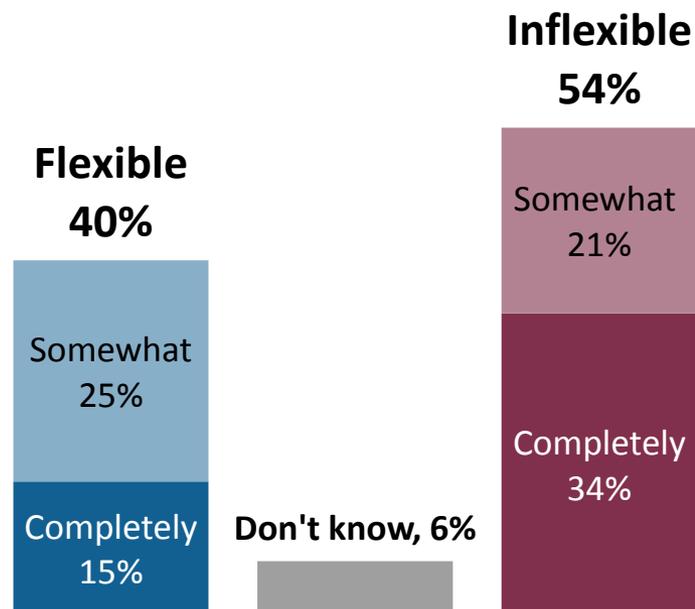
Scheduling Flexibility

About half have at least some flexibility when selecting travel time and 40% have at least some flexibility when selecting travel day.

Time of Day



Day of Week



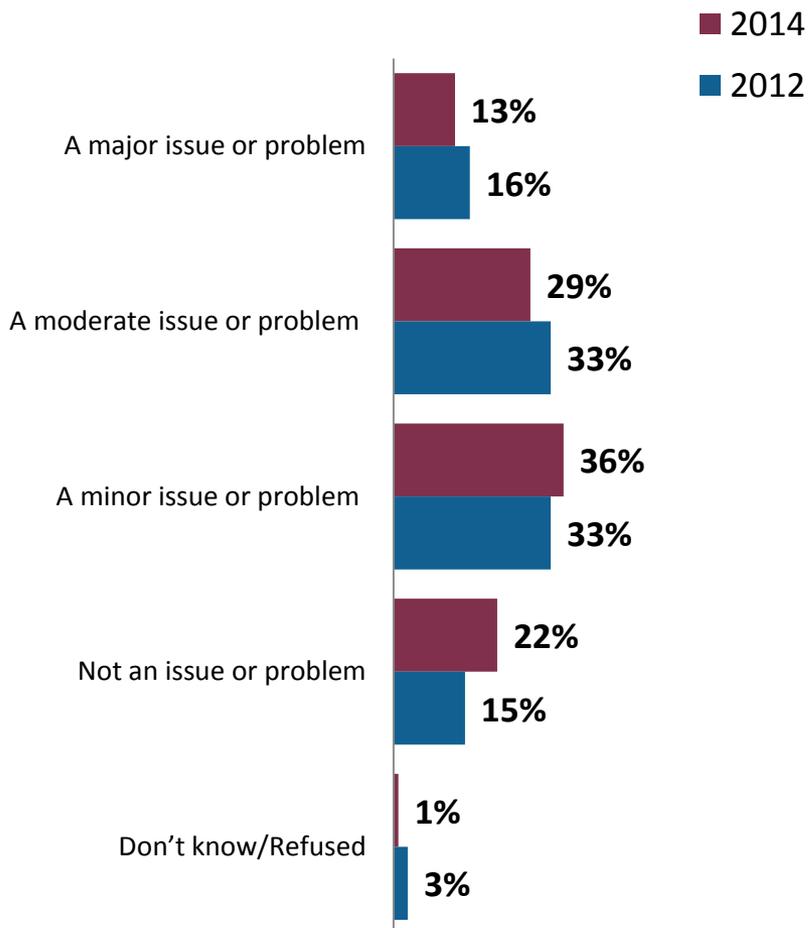
Q20. What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your drivers? Would you say you are... ?

Q21. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?

Wait Times - Comparison

Wait times are less of an issue now than they were in 2012.

Impact of Wait Times



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	Avg wait time (min.)
	2014 n=84	2012 n=88	2014	2012
Anacortes / San Juans Includes	19%	43%	2.6 (n=15)	101 (n=20)
Mukilteo / Clinton	12%	7%	1.0 (n=7)	68 (n=3)
Seattle / Bainbridge	10%	15%	1.0 (n=6)	33 (n=7)
Edmonds / Kingston	8%	17%	1.8 (n=4)	77 (n=8)
Seattle / Bremerton	5%	4%	1.3 (n=3)	53 (n=2)
Fauntleroy / Vashon	5%	4%	.05 (n=2)	30 (n=2)
Coupeville / Port Townsend	4%	7%	1.5 (n=2)	68 (n=3)
Interisland San Juans	4%	--	.07 (n=3)	--
Point Defiance / Tahlequah	1%	--	1.0 (n=1)	--
Vashon / Southworth	1%	2%	3.0 (n=1)	30 (n=1)
All routes	3%	--	--	--
None	17%	--	--	--
Don't know	19%	--	--	--

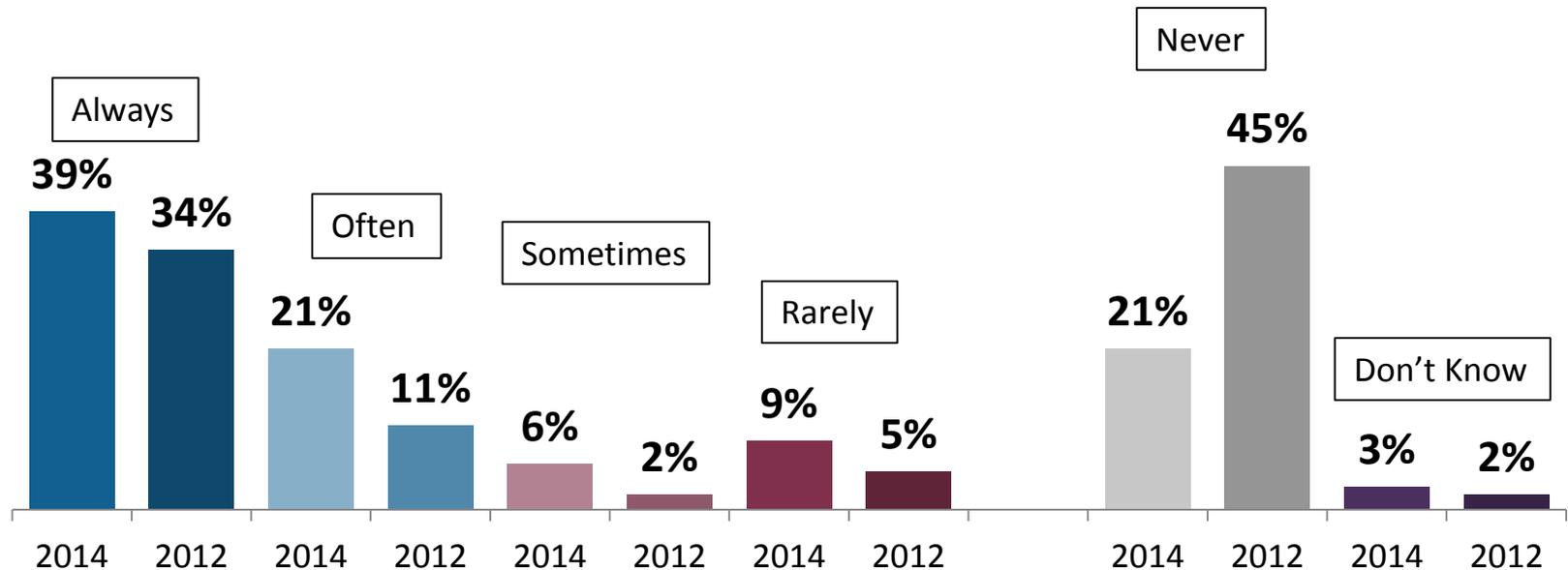
Q23. One problem commercial vehicle drivers have reported is how long they have to wait before they can drive on the ferry. Overall, how big of an issue or problem would you say wait times are for you or your drivers?

Q24. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

Q25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Reservations Comparison

The Coupeville/Port Townsend and Anacortes reservation system has become more popular in the last two years, with the percentage of people who never use it dropping from 45% to 21%. Additionally, the percentage of people who always use it has risen by 5%.



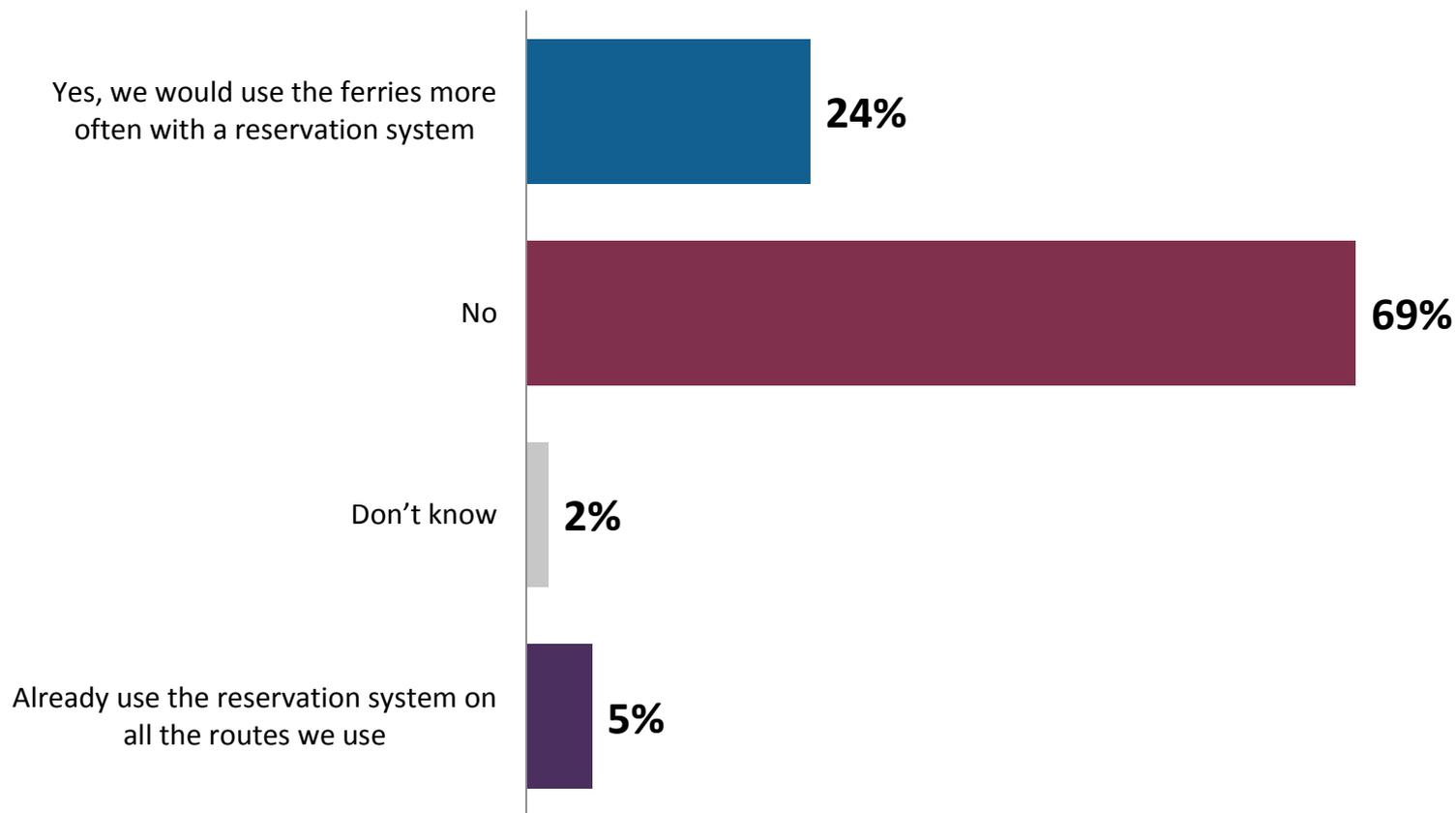
Q29. As you may know, Washington State Ferries offer a commercial vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's commercial vehicle reservation system? Would you say... ?

Reservations

Of those customers who use routes other than Coupeville/Port Townsend and Anacortes (n=55), two thirds (69%) would not use ferries more often given a commercial reservation system, and only a quarter 24% say they would.

Use WSF More w/Reservation System

(n=55)

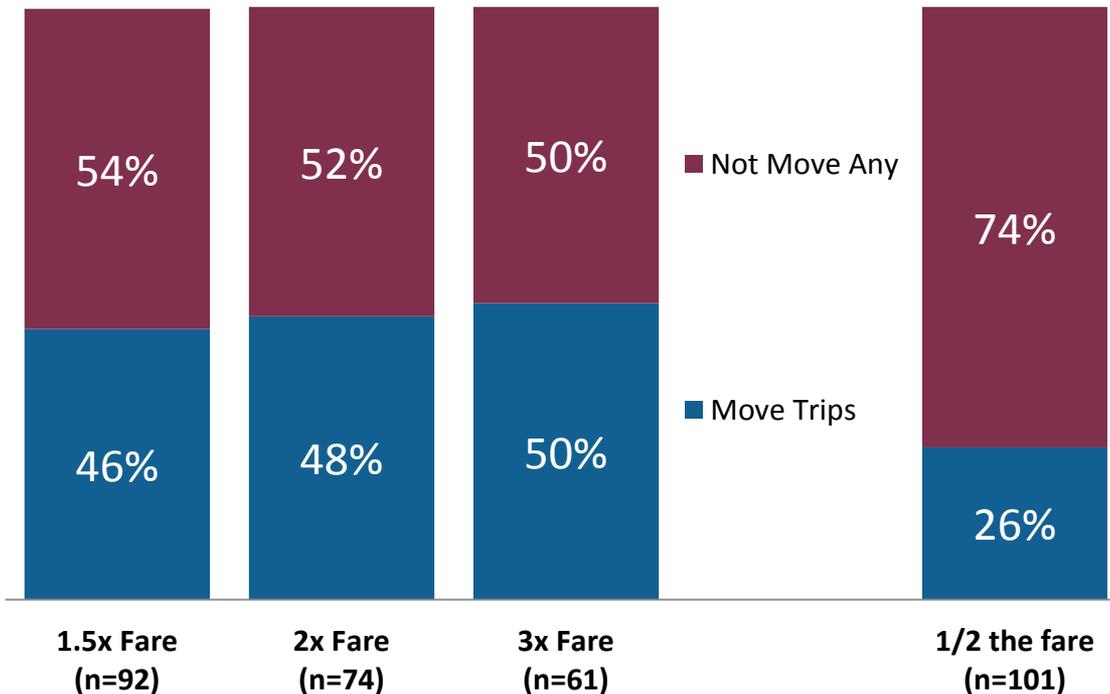


Q32. For the non-Coupeville-Port Townsend and non-Anacortes ferry routes you use, would you use the ferries more often as a result of having a commercial vehicles reservation system on them?

Congestion Pricing

About half of freight customers who travel in peak times (n=92) say they would move trips to off-peak times if they were charged between 1.5 and 3 times the current freight vehicle fare. A quarter of all customers say they would move trips to overnight if fares were cut in half for that time period. Those who would not move because of cheaper fares (n=82) say they lack the flexibility to change the time.

Would Move Trips to Off Peak



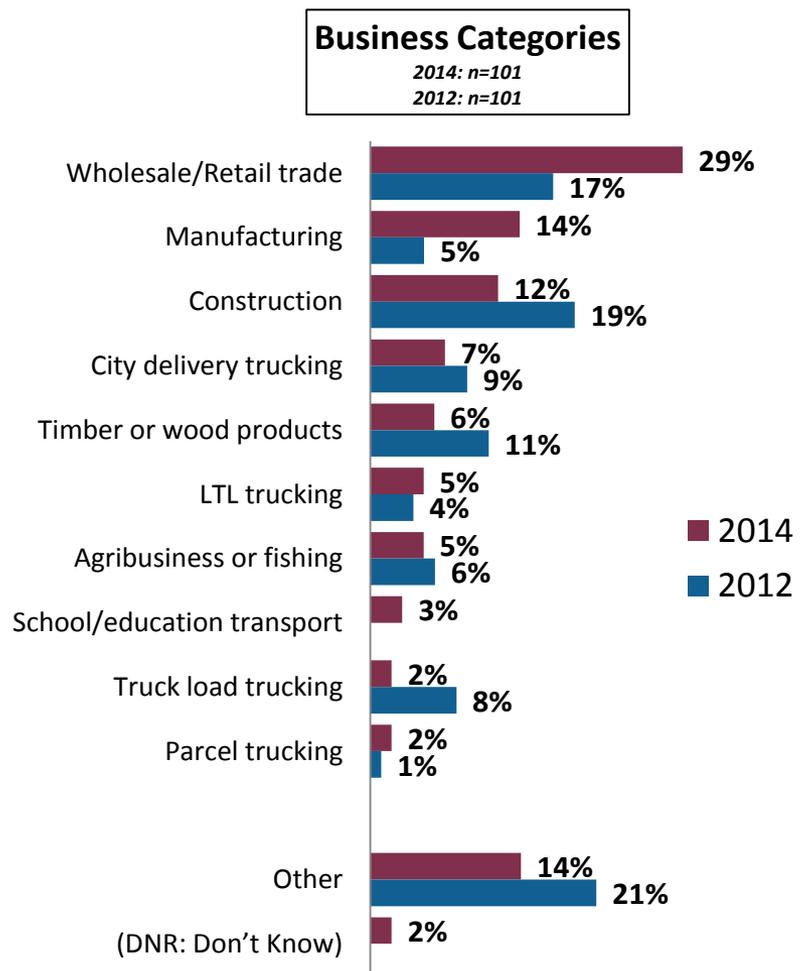
Reasons to continue even w/higher fares	%
Don't have a choice/we go by a schedule/work hours	63%
Customer needs/demands	33%
It's more convenient	4%
Other	5%

Q41-43. If freight customers who use the ferry during peak travel periods were charged one and a half times/double/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?
 Q44. If freight customers on overnight sailings between 9pm and 5am each day were charged just half of the fare currently charged for freight vehicles, what percent of your freight trips would you schedule for the 9pm and 5am time period?
 Q45. If the ferry system were to offer half-price fares for trucks between 9pm and 5am, what reasons might you have to continue using the ferries during the peak periods at those higher fares? (Multi-response)

Questions & Answers

Fleet Profile - Comparison

Wholesale/Retail is up from 17% in 2012 to more than a quarter (29%) now. Manufacturing is also up from 5% to 14% and construction is down from 19% to 12%. Compared to 2012 deliveries to retail/commercial businesses, construction sites and warehouses are all down substantially, although much of this is a function of the type of companies interviewed.



Location Delivered to (by types)	Total		Most Freight	
	2014	2012	2014	2012
Retail or commercial businesses	56%	72%	19%	41%
Residential locations	40%	42%	30%	19%
Construction sites	30%	50%	41%	26%
Warehouses	8%	35%	--	8%
Some other type of place or location	6%	9%	4%	7%
School/educational locations	3%	--	--	--
(DNR: Don't Know)	3%	--	7%	--

Q12. Which of the following categories best describes your company's line of business?

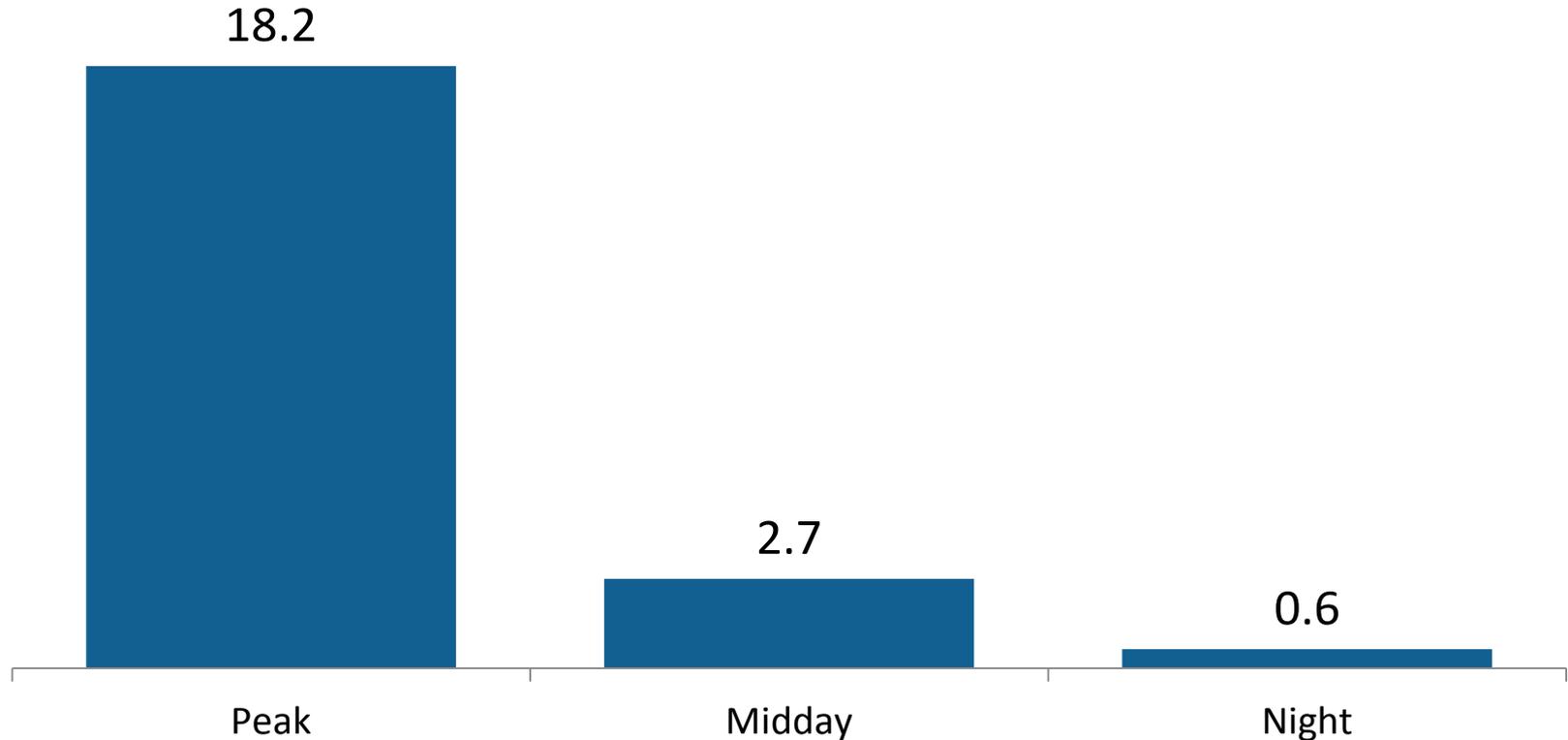
Q13. Using the ferries, which location type do you deliver freight to? [MULTI RESPONSE]

Q14. And, which location type do you deliver the most freight to?



Travel Behavior - Detailed

Freight trips are heavily skewed towards peak hours, with almost no freight trips at night.



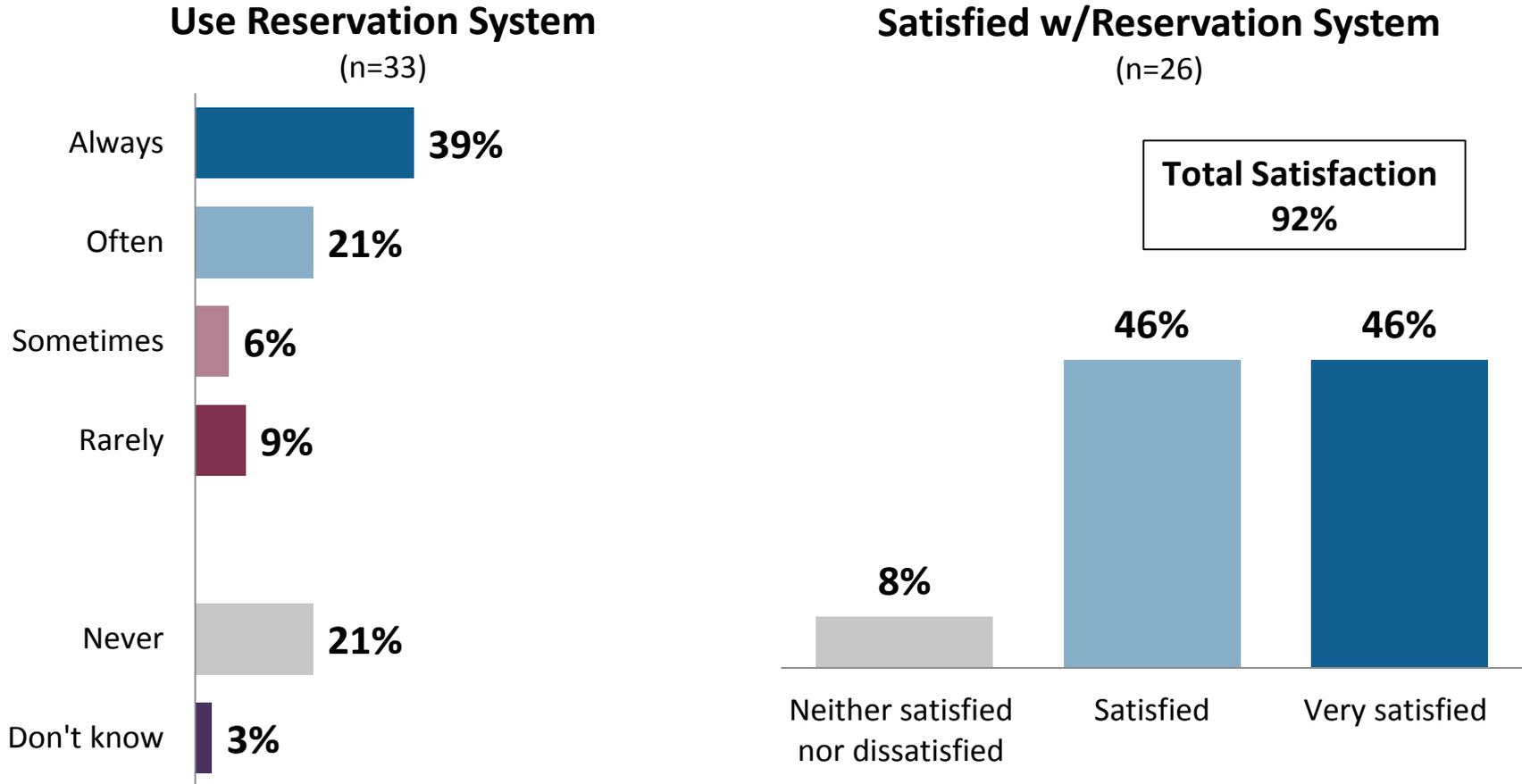
Q15. [ASK IF Q5 = 1] In a typical month from **October through March**, how many of your [INSERT NUMBER FROM Q6] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Q16. [ASK IF Q5 = 1] In a typical month from **April through September**, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Q17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Reservations

Of those customers who use the Coupeville/Port Townsend or Anacortes routes (n=33), the majority use the commercial reservation system always (39%) or often (21%). One in ten (21%) never use the system. Of those customers who use the reservation system (n=26) most (92%) say they are satisfied.

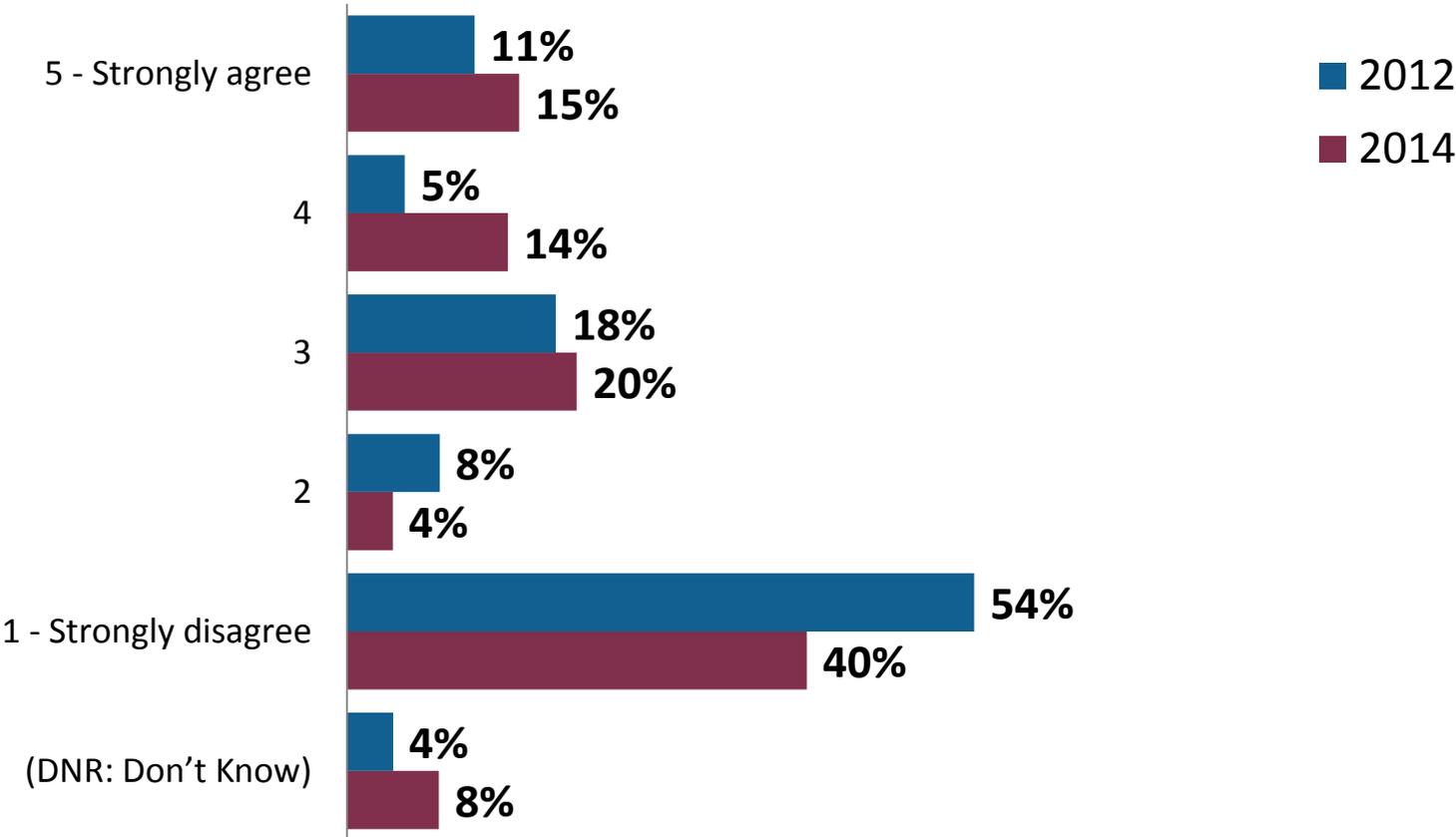


Q29. As you may know, Washington State Ferries offer a commercial vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's commercial vehicle reservation system?

Q30. All things considered, how satisfied are you with the commercial vehicle reservation system that WSF offers?

Congestion Pricing - Comparison

Overall, freight shippers are less opposed to the idea of congestion pricing than in 2012 (44% vs. 62%).



Q40. Using a 5-point scale where 1 means "strongly disagree" and 5 means "strongly agree," to what extent do you agree or disagree with the following statement? **In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount from regular freight fares if they travel during off-peak periods.**