



Washington State Transportation Commission
Ferry Riders Opinion Group (FROG) Survey Panel
May 2018 Survey of Freight Shippers Using WSF
Final Report

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions).

The FROG research initiative in 2018 consists of the following main phases:

- Winter Customer Survey Study (target audience: Commuter riders) via FROG panel
- **Freight Survey (target audience: WSF freight customers) via executive telephone survey**
- General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS panel
- Reservation Survey (target audience: Users of WSF reservation program) via FROG panel
- Summer On-board Recreational Survey (target audience: Out of state riders) via in-person intercepts
- Summer Performance, Recreational, and Policy Study (target audience: Commuter and social/recreational riders) via FROG panel

The focus of this report is the Freight Survey

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Methodology



- ▶ Telephone survey of WSF freight shippers drawn from WSF commercial business account holders
- ▶ May 14th – June 1st, 2018
- ▶ 100 total interviews; see appendix for list of companies; 24 companies also did the survey in 2016 (5 of those also in 2014)
- ▶ 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%.

Executive Summary



Fleet Profile*

- Freight customers line of businesses varies widely; more than a third (36%) of the 2018 freight customers interviewed classify themselves as Wholesale/Retail, followed by Construction (14%) and Wood Products (8%).
- A majority (78%) of deliveries are made to retail or commercial businesses, followed by construction sites (46%) and residential (45%) locations.
- About six-in-ten freight customers (59%) have 1-10 trucks in their fleet and four-in-ten (41%) have 11 or more.
- The average fleet size is 13.4 trucks.
- On average, just under half (47%) of freight customers' trucks use Washington State Ferries.
- Of the trucks that use WSF in 2018, 59% are under 40 feet in length and 41% are 40 feet or greater. Overall truck size using WSF has remained the same since 2016.
- About one-in-three freight companies have the majority of their fleet based North of Seattle (34%) or West of Seattle (27%).
- The vast majority (87%) pay their drivers by the hour.

**Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014*

Executive Summary



Ferry Usage*

- More than half of freight customers (57%) use WSF at least weekly similar to 2016 (52%).
- The average number of one-way trips per month by all freight companies is 15.8 similar to 2016 (15.3).
- About half (45%) do see a seasonal difference between October-March verse April-September in the average number of ferry crossings made by their trucks.
- Freight trips are skewed towards peak hours (71%), with few freight trips at night (9%).
- Edmonds/Kingston (25%) and Anacortes/San Juans (24%) are the most used routes, followed by Mukilteo/Clinton (18%) and Fautleroy/Vashon (11%).
- The majority of companies (63%) say their current frequency of ferry use has not changed, with a quarter (28%) increasing and 9% (n=9) decreasing frequency.
- One-in-four (26%) of freight companies anticipate their ferry usage will grow in the next 12 months with 5% saying it will shrink.
- Most companies (89%) say Washington State Ferries provide a good value. Overall, the perception of WSF as a good value has remained similar to both 2016 and 2014.

**Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014*

Executive Summary



Travel Flexibility*

- One-in-four (41%) have at least some flexibility when selecting travel time and almost half (46%) have at least some flexibility when selecting travel day. However, 58% lack flexibility when it comes to time of day and 53% lack flexibility for day of week.
- Customer demand/request (51%) is the reason for the lack of flexibility.
- Less than one-in-five (17%) freight companies say they are unable to complete their trips in one day because of the ferry schedules.

Wait Times

- Three quarters (76%) of freight customers say wait times are at least a minor issue similar to 2016 (75%) and 2014 (77%).
- The Anacortes/San Juans route (28%) has the most mentions of long wait times, with an average 1.6 boat wait.
- Wait times impact freight companies more negatively (53%) than fares charged (19%).

**Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014*

Executive Summary



Reservations*

- Similar to 2016 (83%), over four-fifths (84%) in 2018 are aware of WSF's vehicle reservation system, up from 72% in 2014.
- Similar to 2016, of those customers who use the Coupeville/Port Townsend or Anacortes routes, the majority always (69% - 2018, 70% in 2016) utilize reservations. This is a dramatic change from 2014 where only 39% of customers always used the system.
- Of those customers who use the reservation system, most are satisfied (82% in 2018 compared to 89% in 2016 and 92% in 2014).
- One-in-ten (8% - 2018, 11% - 2016) are dissatisfied with WSF reservation system.

* Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014

Executive Summary



Potential Reservation System*

- Of those customers who use Central Puget Sound ferry routes (n=72 in 2018, n=75 in 2016), two thirds (62% - 2018, 63% - 2016) would not change their ferry usage given a potential Central Puget Sound reservation system.
- About one-in-seven (15% - 2018, 16% - 2016) would increase usage with a Central Puget Sound reservation system in place.
- Of those who would be open to a vehicle reservation system for Central Puget Sound routes (n=72), similar to 2016 (54%), over half (58%) in 2018 say they would be likely to use the system as described with a 25% deposit.
- Almost four-in-ten (41%) say charging 20% more for reservations but only requiring trucks show-up 10 minutes instead of 30 minutes prior to sailing would make some difference in their likelihood to use the system.

**Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014*

Executive Summary



Congestion Pricing*

- Only one-in-three of customers (32%) who travel in peak times (n=63) say they would move trips to off-peak times if they were charged 1.5 times the current freight vehicle fare. This is similar to 2016 (34%).
- About half of customers (48%) who travel in peak times (n=60) say they would move trips to off-peak times if they were charged 3 times the current freight vehicle fare. This is similar to 2016 (42%).

Over Night Pricing*

- One-in-five of all customers (22%) say they would move trips to overnight if fares were cut in half for that time period. This is similar to 2016 (25%) and 2014 (26%).
- Most freight customers (79% - 2018, 82% - 2016) say a secure arrival side parking area would not make them more likely to schedule ½-priced late-night ferry sailings.
- Similar to 2016/2014 (14%), just over one-in-ten freight customers (11% - 2018) say a secure arrival side parking area would make them more likely to schedule ½-priced late-night ferry sailings.

**Unless otherwise noted, results from 2018 are similar to data collected in 2016 and 2014*



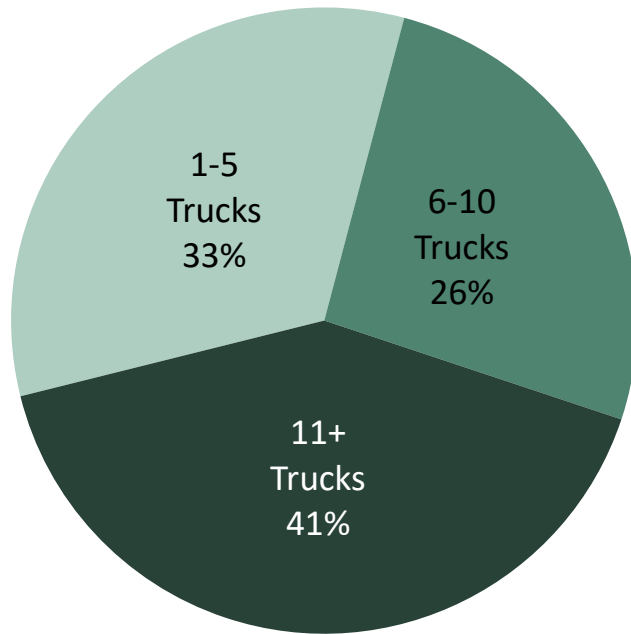
Fleet Profile

Fleet Profile

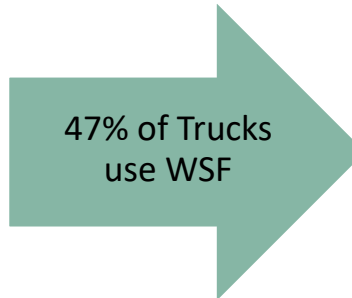


The 2018 average fleet size is 13.4. Over half of customers (59%) have 1-10 trucks in their fleet and more than four-in-ten (41%) have 11 or more. On average, just under half (47%) of the trucks in a fleet use Washington State Ferries. Of the trucks that use WSF, 46% are under 30 feet in length and 35% are over 50 feet.

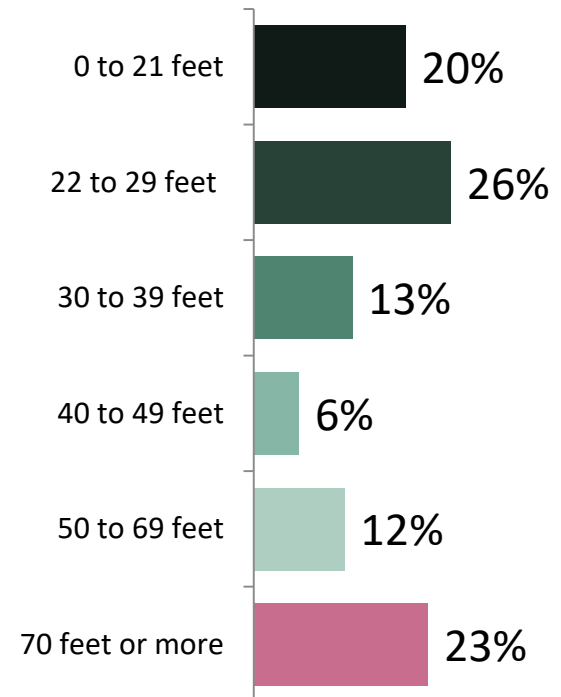
2018 Number of Trucks in Fleet
(n=100)



Mean: 13.4



2018 Size of Trucks Traveling on WSF
(n=100)



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.

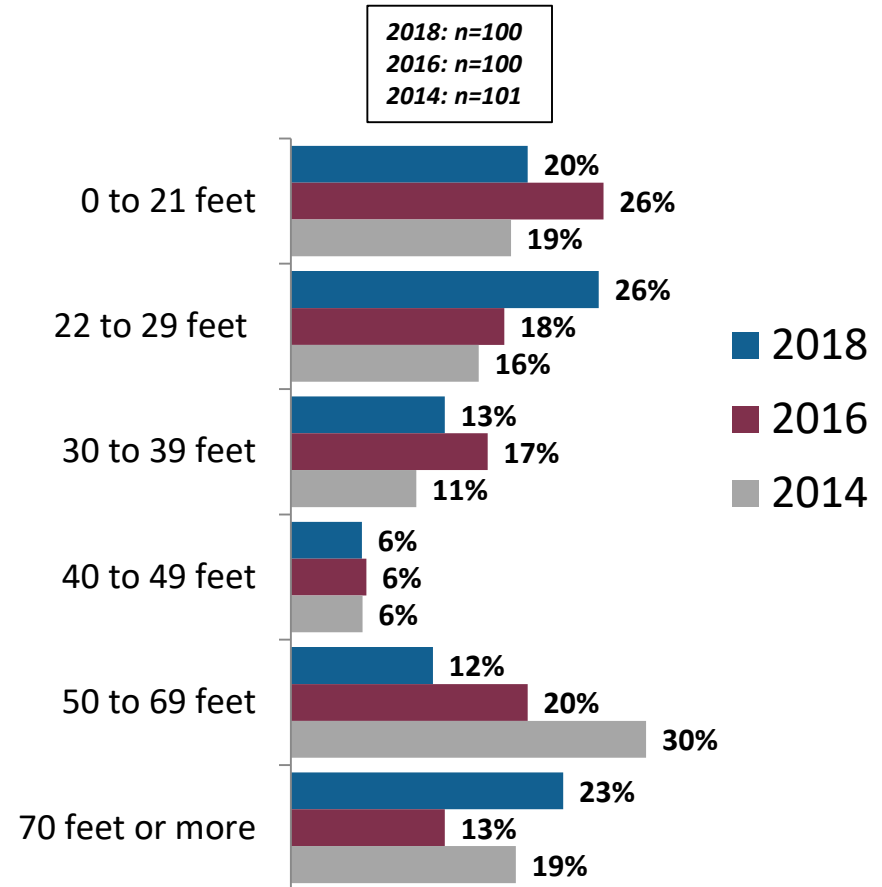
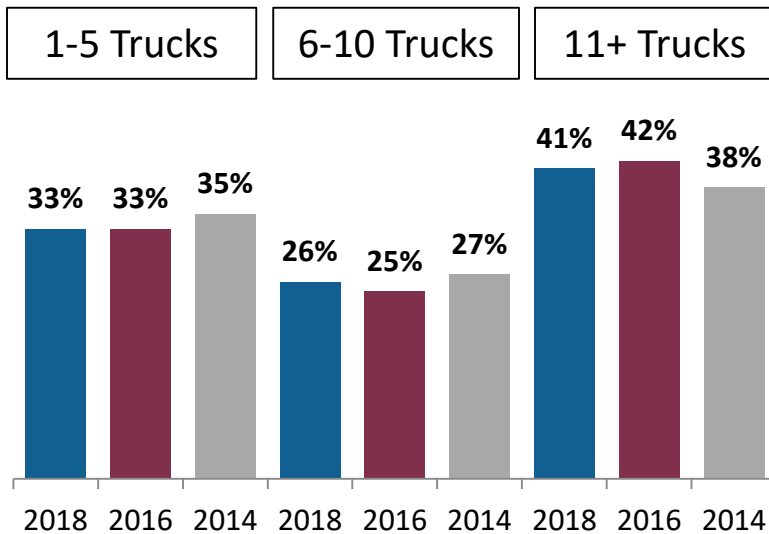
Q7a-f. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

Fleet Profile – Comparison



Fleet sizes and make up for the freight companies interviewed in the 2018 survey are similar to the 2016 and 2014 survey. The percent of freight companies' fleets using WSF has also remained constant at about 50% since 2014.

2018: n=100, 47% of fleet use WSF
 2016: n=109, 52% of fleet use WSF
 2014: n=104, 54% of fleet use WSF



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

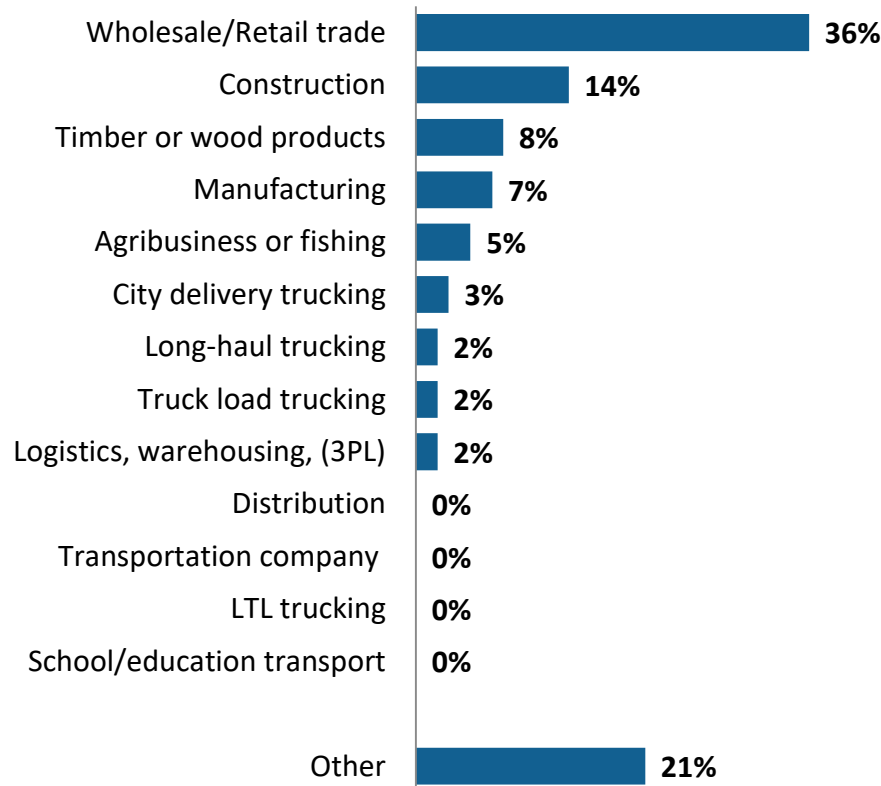
Q7a-f. Thinking only of those trucks using Washington State Ferries, how many are in each of the following size categories? [IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer]

Fleet Profile



More than a third (36%) of freight customers describe their line of business as Wholesale/Retail, followed by Construction (14%) and Timber/Wood products delivery trucking (8%). A majority (78%) of deliveries are made to retail or commercial businesses, followed by construction sites (46%) and residential locations (45%).

Business Categories (2018 n=100)



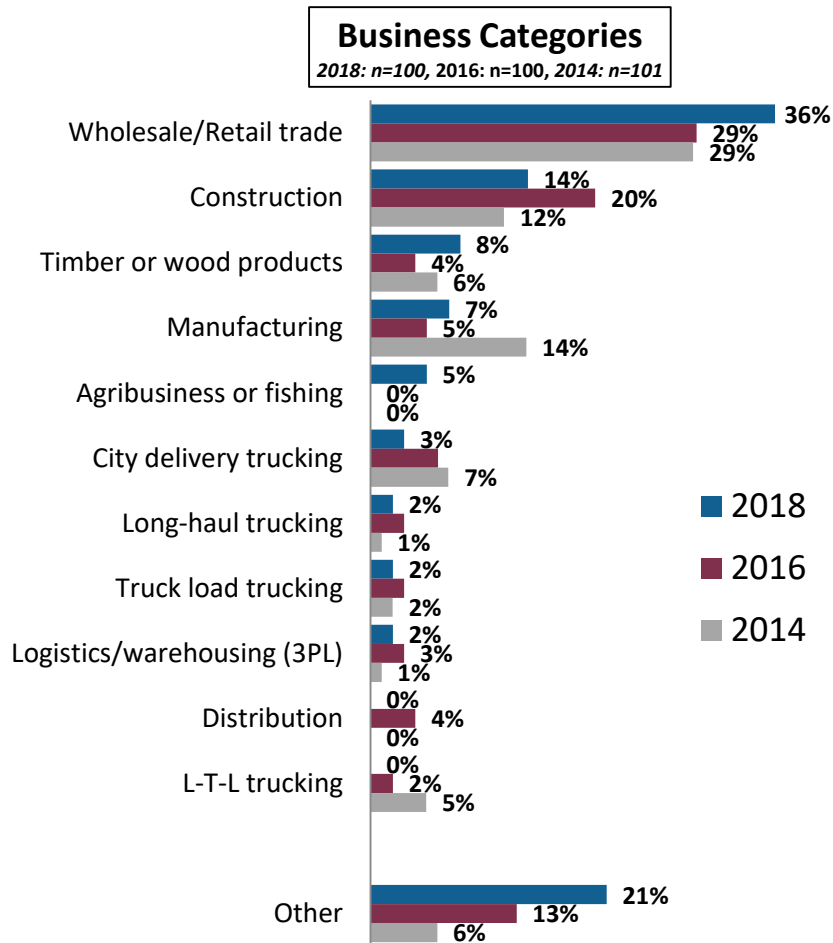
Location Delivered to (by types)	Total (Q12)	Most Freight (Q13)
Retail or commercial businesses	78%	48%
Construction sites	46%	17%
Residential locations	45%	19%
Warehouses	27%	3%
School/educational locations	26%	1%
Military	16%	2%
Some other type of place or location	13%	9%
(DNR: Don't Know)	1%	2%

Q11. Which of the following categories best describes your company's line of business?
 Q12. Using the ferries, which location type do you deliver freight to? [MULTI RESPONSE]
 Q13. And, which location type do you deliver the most freight to?

Fleet Profile – Comparison



Wholesale / retail trade is up from 29% in 2014 and 2016 to a over a third in 2018 (36%). Many of these differences in these tables are a function of the limited sample size of the study not market changes.



Location Delivered to (by types)	Total (Multiple Mentions)			Most Freight		
	2018	2016	2014	2018	2016	2014
Retail or commercial businesses	78%	53%	56%	48%	27%	19%
Residential locations	45%	33%	40%	19%	27%	30%
Construction sites	46%	28%	30%	17%	23%	41%
Warehouses	27%	26%	8%	3%	10%	--
School/educational locations	26%	2%	3%	1%	--	--
Military Locations	16%	--	--	2%	--	--
Some other type of place or location	13%	10%	6%	9%	3%	4%

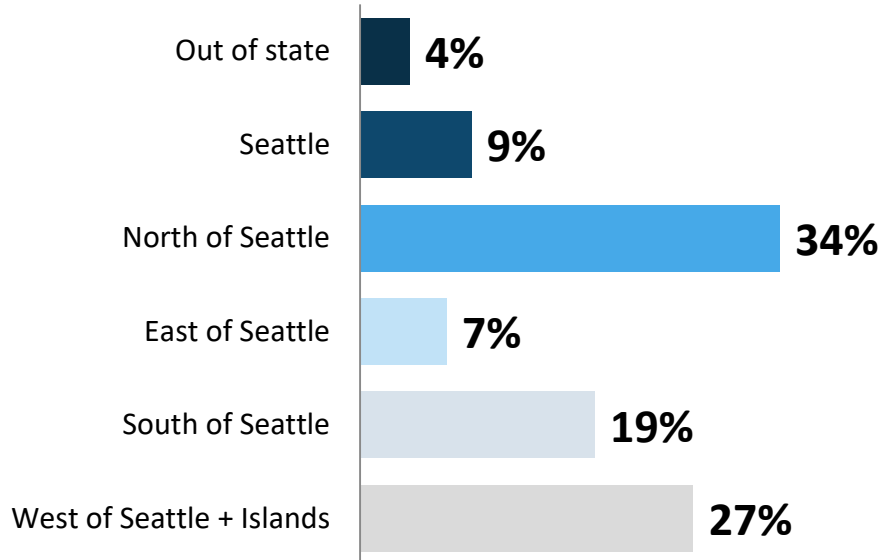
Q11. Which of the following categories best describes your company's line of business? Q12. Using the ferries, which location type do you deliver freight to? [MULTI RESPONSE] Q13. And, which location type do you deliver the most freight to?

Fleet Profile – Fleet Zip Code



This new question asked in 2018 found that the freight companies interviewed from WSF commercial account list had their trucks based in areas either north (34%), west (27%) or south (19%) of Seattle.

General Zip Code Where Majority of Trucks Are Based - 2018 (n=97)



Q8. In what zip code is the majority of your fleet based?

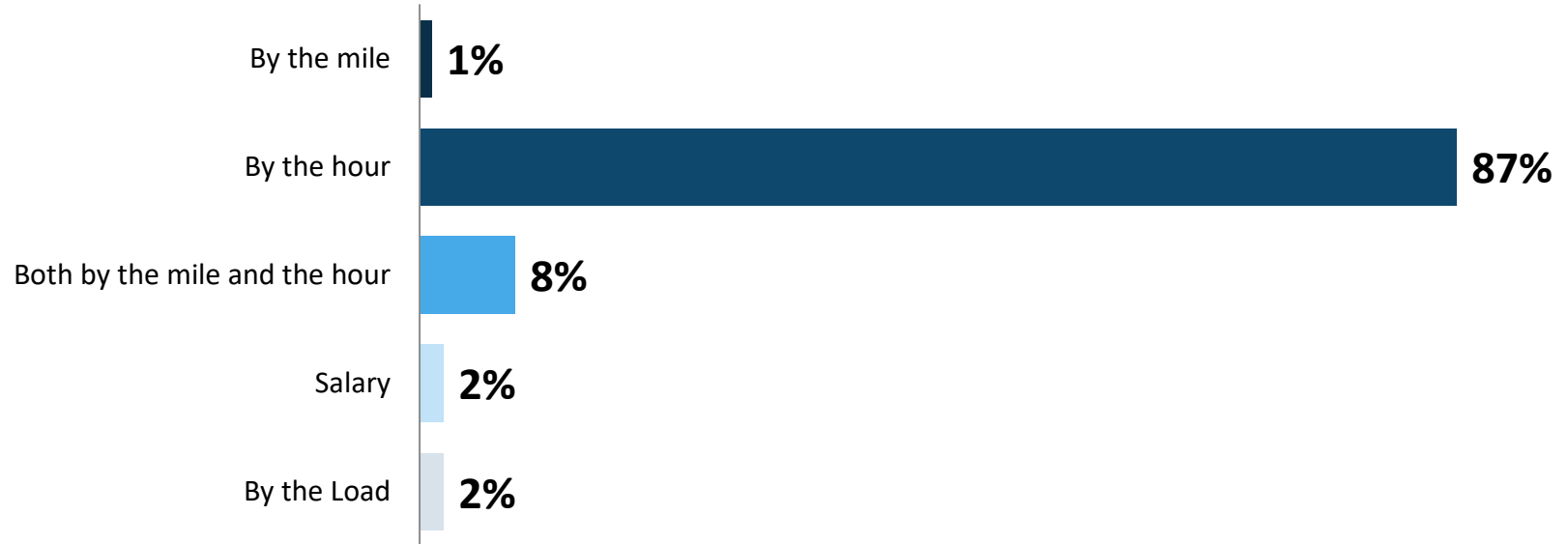
Fleet Profile – Drivers Pay



The vast majority of freight companies (87%) pay their drivers by the hour.

Driver's Pay Method - 2018

(n=95)



Q38. Do you pay your drivers by the mile, by the hour, or a mix of the two?



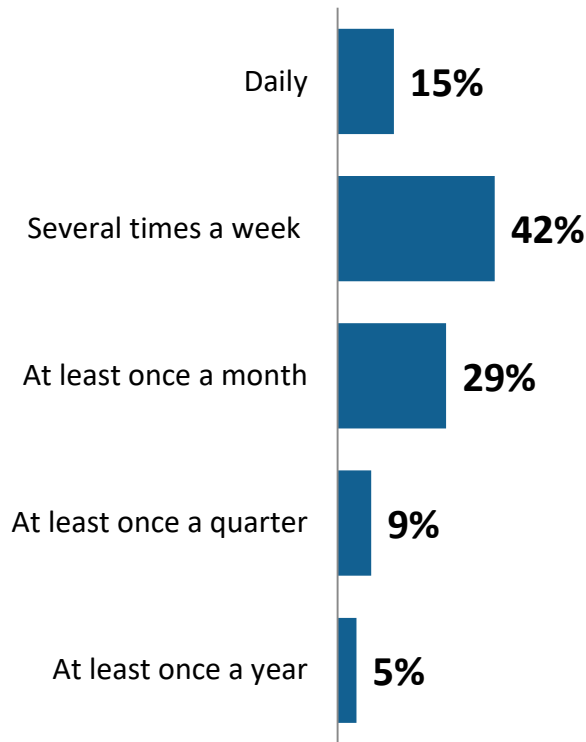
Ferry Usage

Ferry Usage

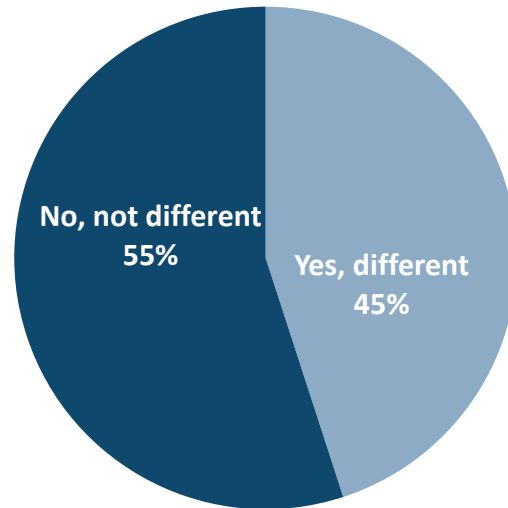


More than half of freight customers (57%) use WSF at least weekly in 2018. On average companies make about 16 one-way trips per month. The study also found that about half (45%) report their average number of crossings do differ somewhat between the October through March and April through September periods.

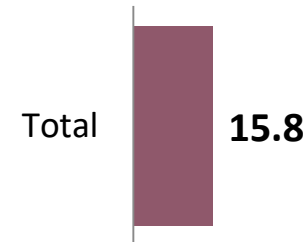
2018 Frequency of Ferry Trips



2018 Truck Crossing - Seasonal Difference



2018 Average Number of One-Way Trips Per Month



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. Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings.

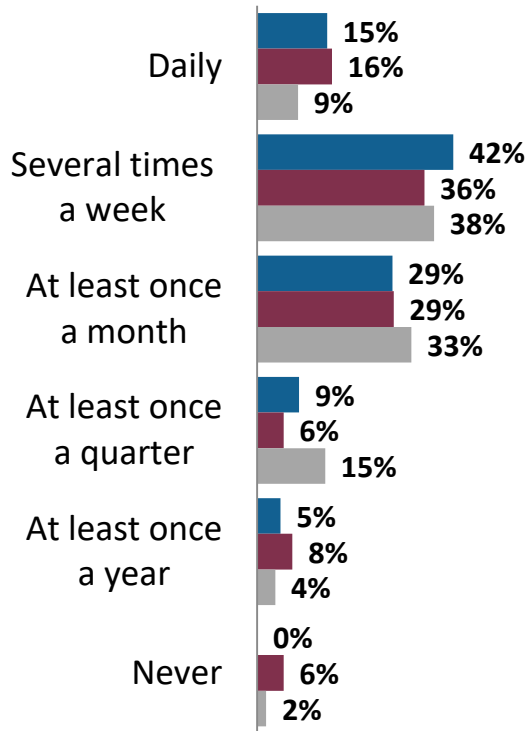
Ferry Usage – Comparison



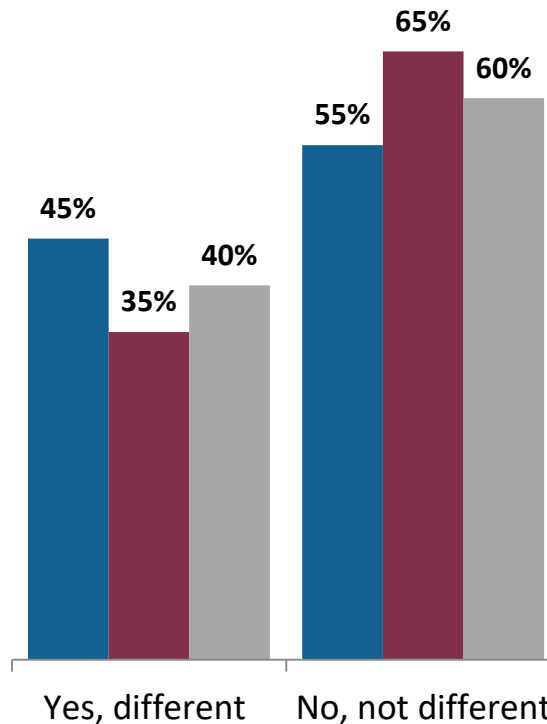
Frequency of ferry trips over the year, average number of one-way trips per month, and seasonal truck crossings are all similar in 2018 to 2016/2014 given study sample size.

■ 2018 ■ 2016 ■ 2014

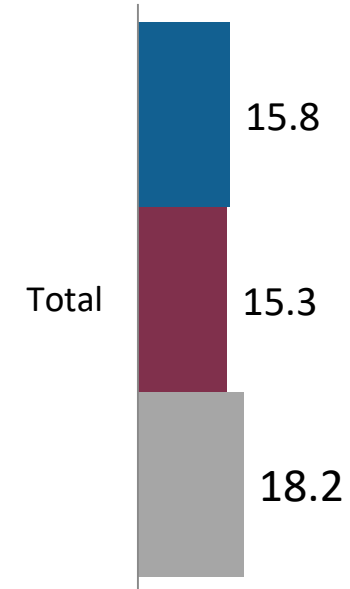
Frequency of Ferry Trips



Truck Crossing – Seasonal Difference



Average Number of One-Way Trips Per Month



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.

Routes Traveled



Anacortes / San Juan (42%) is the most frequently used route overall, followed by Edmonds/Kingston (36%) and Mukilteo/Clinton (35%).

<i>Route</i>	<i>Total Use 2018 (Q9)</i>	<i>Most Used 2018 (Q10)</i>
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	42%	24%
Edmonds / Kingston	36%	25%
Mukilteo / Clinton	35%	18%
Fauntleroy / Vashon	23%	11%
Seattle / Bainbridge	19%	8%
Coupeville / Port Townsend	17%	5%
Seattle / Bremerton	14%	1%
Point Defiance / Tahlequah	9%	4%
Vashon / Southworth	6%	2%
Fauntleroy / Southworth	4%	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	4%	1%
Anacortes / Sidney	--	--
Don't know/Refused	4%	5%
Routes used equally	--	--

Q9. What ferry routes do you use for moving freight? [MULTI RESPONSE]

[IF MORE THAN ONE ROUTE MENTIONED IN Q9 ASK FOLLOW-UP Q10]

Q10. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q9]

Routes Traveled – Comparison



More of the companies in 2018 reported using most often the Anacortes/San Juan and Fauntleroy/Vashon routes than in 2016 to the decline of the Seattle/Bainbridge route.

Route	Total Use		Most Used	
	2018	2016	2018	2016
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	42%	33%	24%	10%
Edmonds / Kingston	36%	41%	25%	19%
Mukilteo / Clinton	35%	33%	18%	23%
Fauntleroy / Vashon	23%	15%	11%	2%
Seattle / Bainbridge	19%	28%	8%	15%
Coupeville / Port Townsend	17%	15%	5%	2%
Seattle / Bremerton	14%	12%	1%	4%
Point Defiance / Tahlequah	9%	8%	4%	2%
Vashon / Southworth	6%	10%	2%	2%
Fauntleroy / Southworth	4%	7%	--	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	4%	7%	1%	--
Anacortes / Sidney	--	6%	--	--
Routes used equally	4%	--	5%	19%
Don't know/Refused	--	5%	--	2%

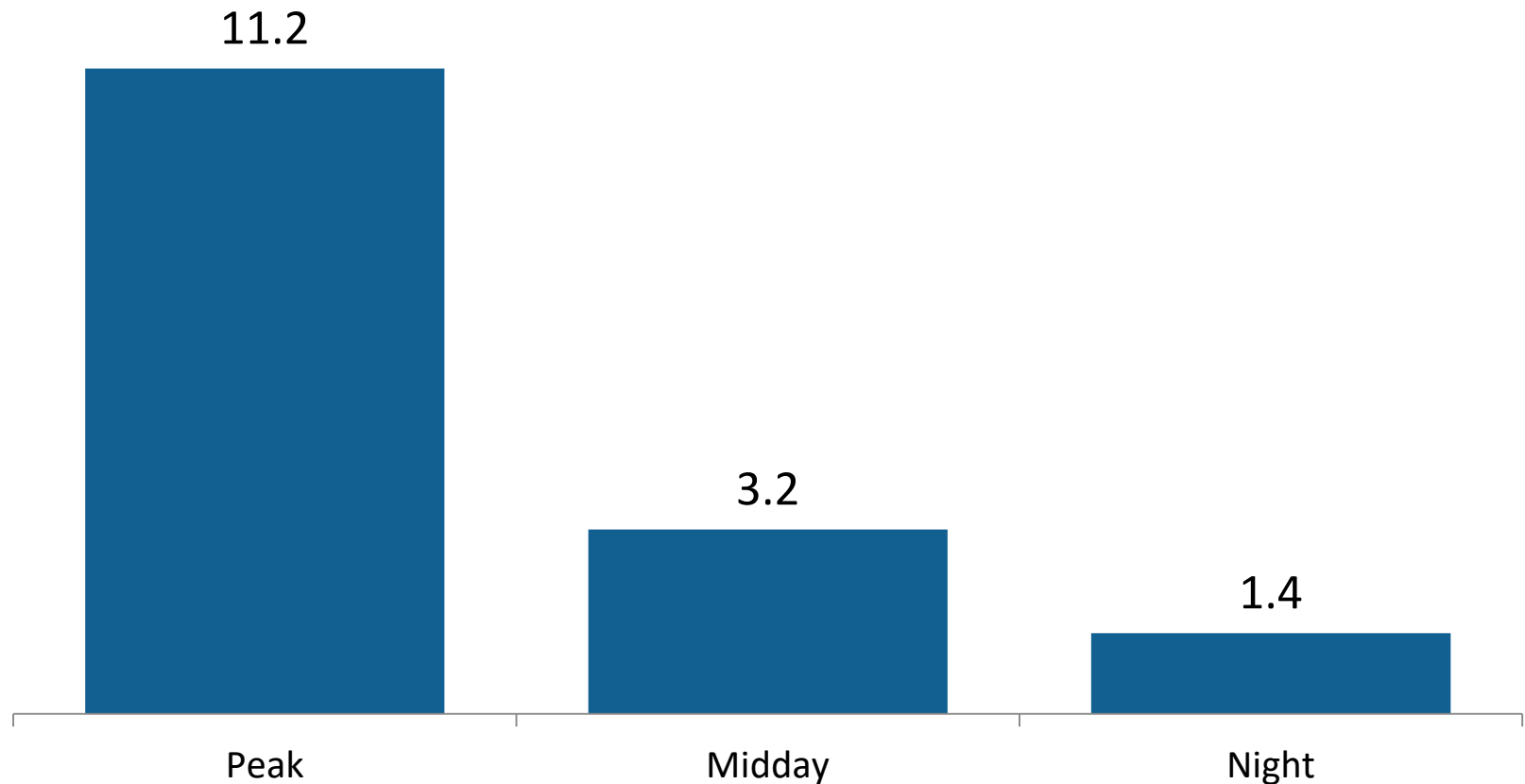
Q9. What ferry routes do you use for moving freight? [MULTI RESPONSE] [IF MORE THAN ONE ROUTE MENTIONED IN Q9 ASK FOLLOW-UP Q10]

Q10. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q9]

Travel Behavior – Detailed



Out of the average of 15.8 trips per month, the 2018 study found 71% of the trips were in peak times, 20% of the trips during midday hours and 9% of the trips at night.

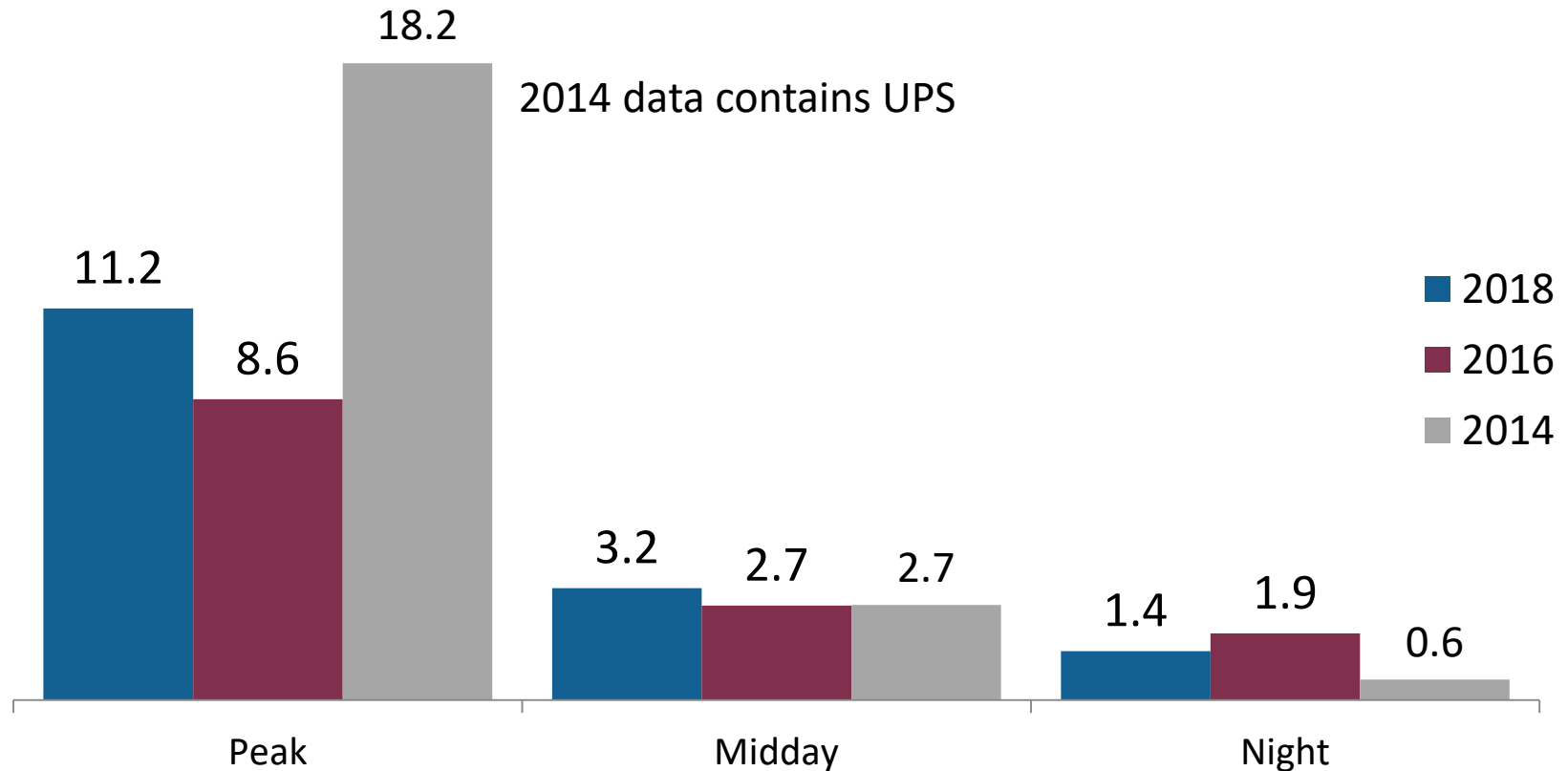


Q15a-c In a typical month, how many of your [INSERT NUMBER FROM Q3] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior – Detailed Comparison



The 2018 and 2016 trips per period are very similar.

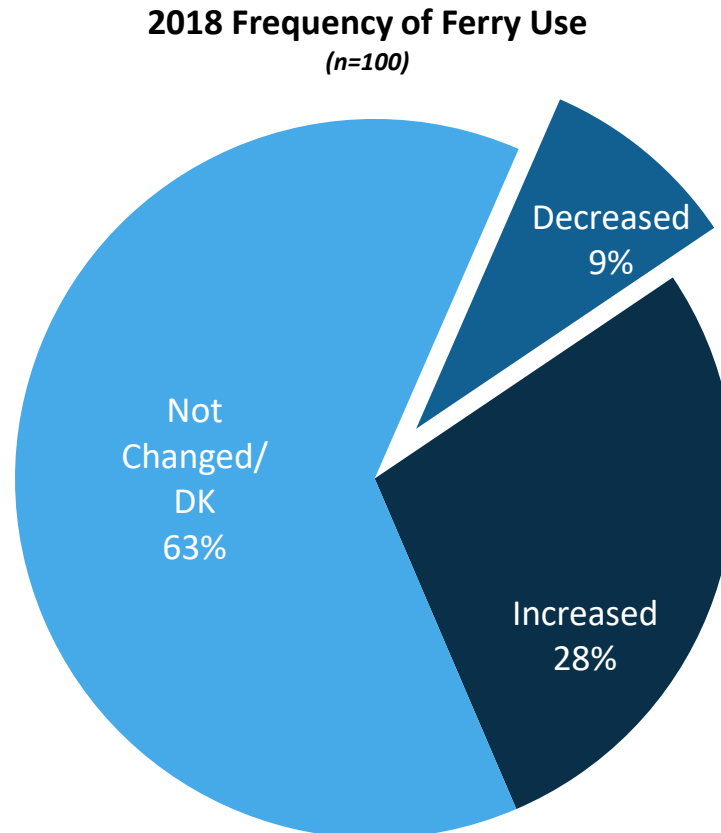


Q15a-c In a typical month, how many of your [INSERT NUMBER FROM Q3] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

Travel Behavior



The majority of companies say frequency of ferry use has not changed in 2018, with a quarter (28%) increasing and 9% decreasing frequency.

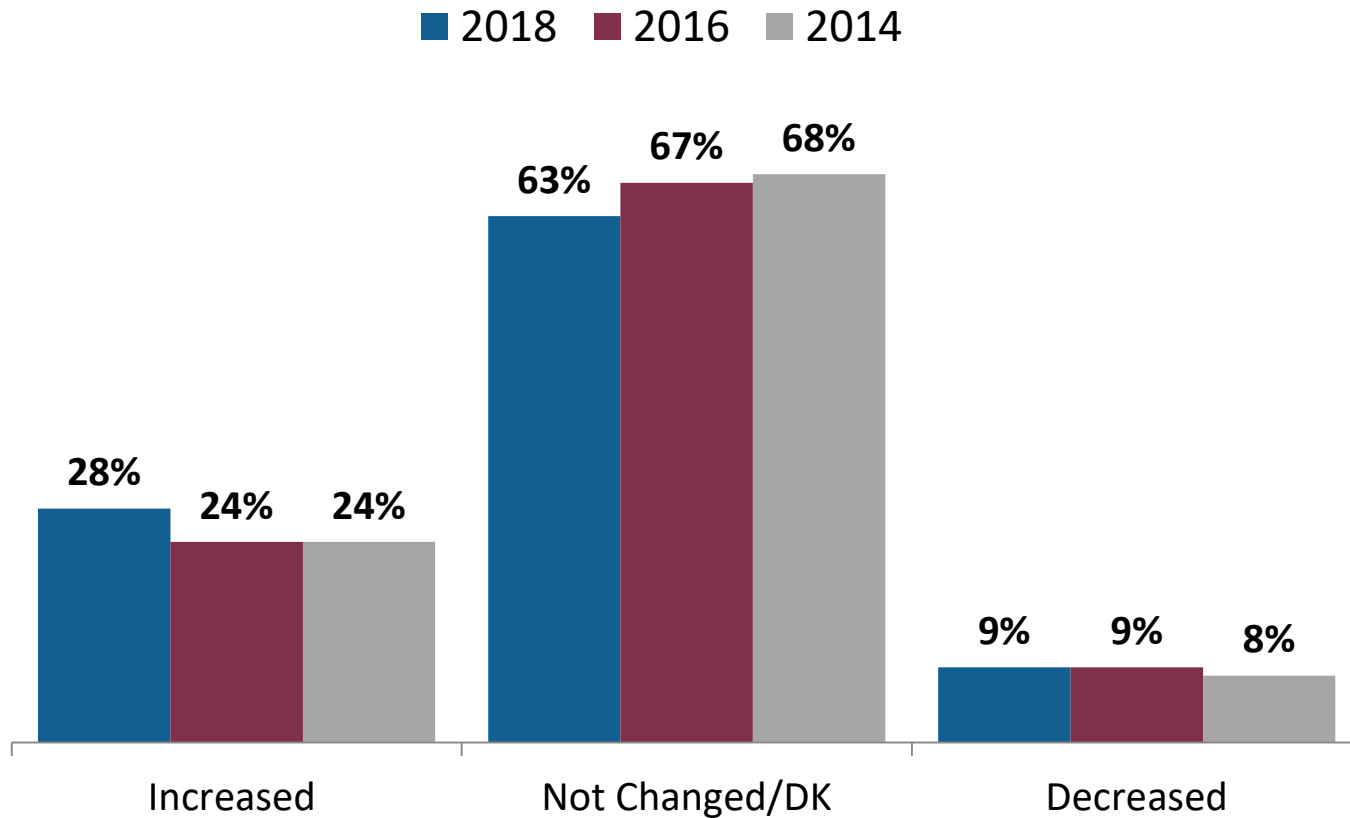


Q39. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?

Travel Behavior – Comparison



Travel behavior has remained consistent from 2014/2016 to 2018.



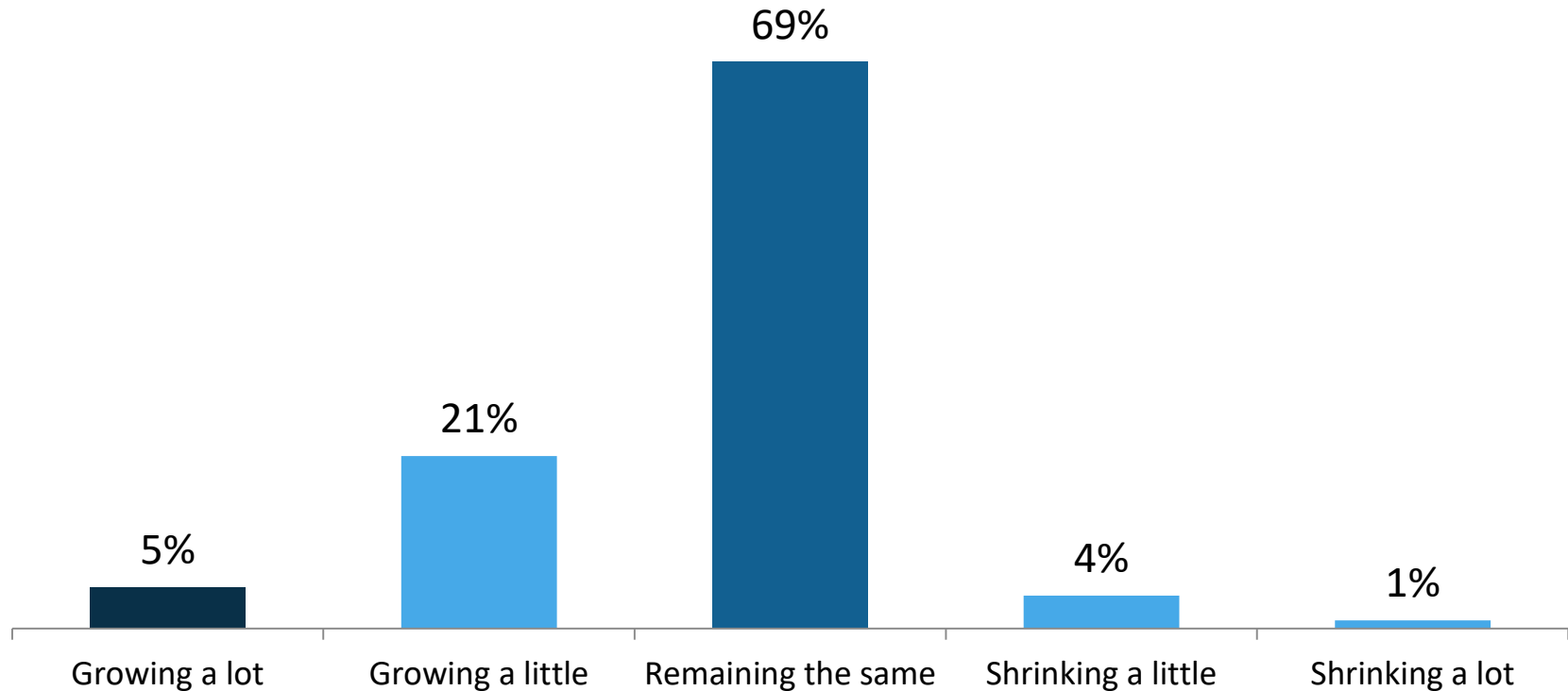
Q39. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?
Q39b. What is the primary reason for the decrease?

Travel Behavior – Future



The majority of companies in 2018 say their future frequency of ferry use will remain the same with 26% saying it will grow and 5% saying it will shrink in the next 12 months.

2018 Frequency of Ferry Use
(n=100)



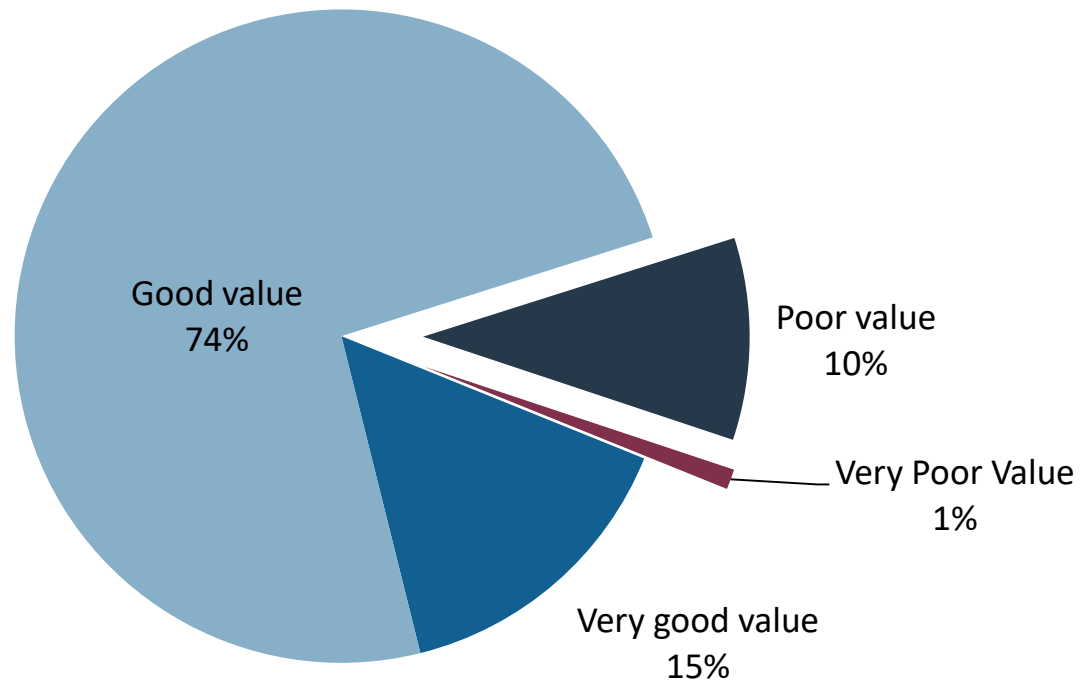
Q14. In the next 12 months do you foresee your freight delivery business use of the ferries ...?

Value Perception



Eliminating three “don’t knows,” most companies (89%) say Washington State Ferries provide a good or very good value compared to 11% who say the value is either poor or very poor.

Value Perceptions – 2018 (n=97)

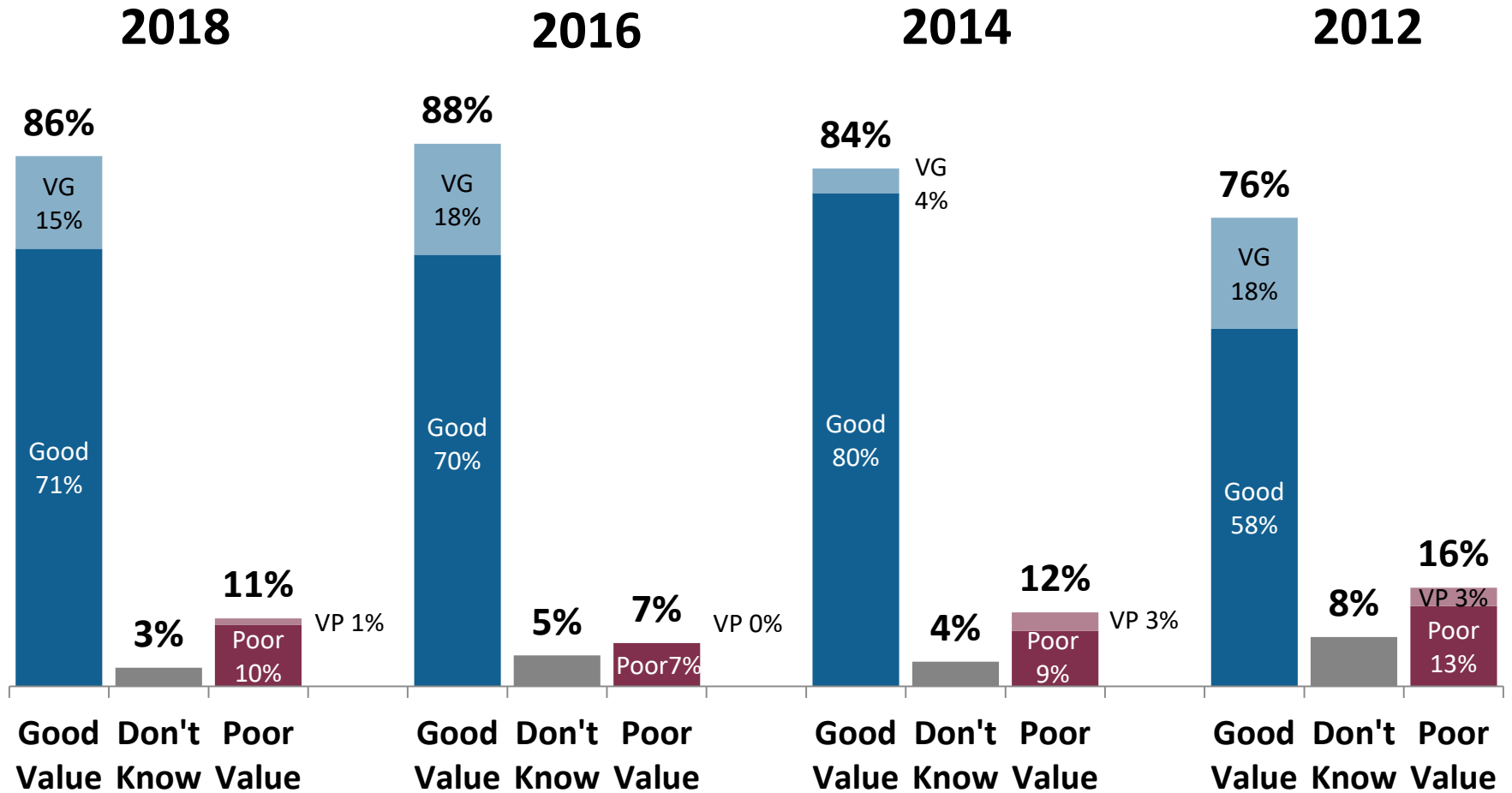


Q40. Considering your firm’s experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? “Value” means what you receive for the amount you pay. Are the Washington State Ferries ...?

Value Perception – Comparison



Overall, the perception of WSF as a good value remains the same between 2012/14/16 and 2018 at over eight out of ten (76% to 86%).



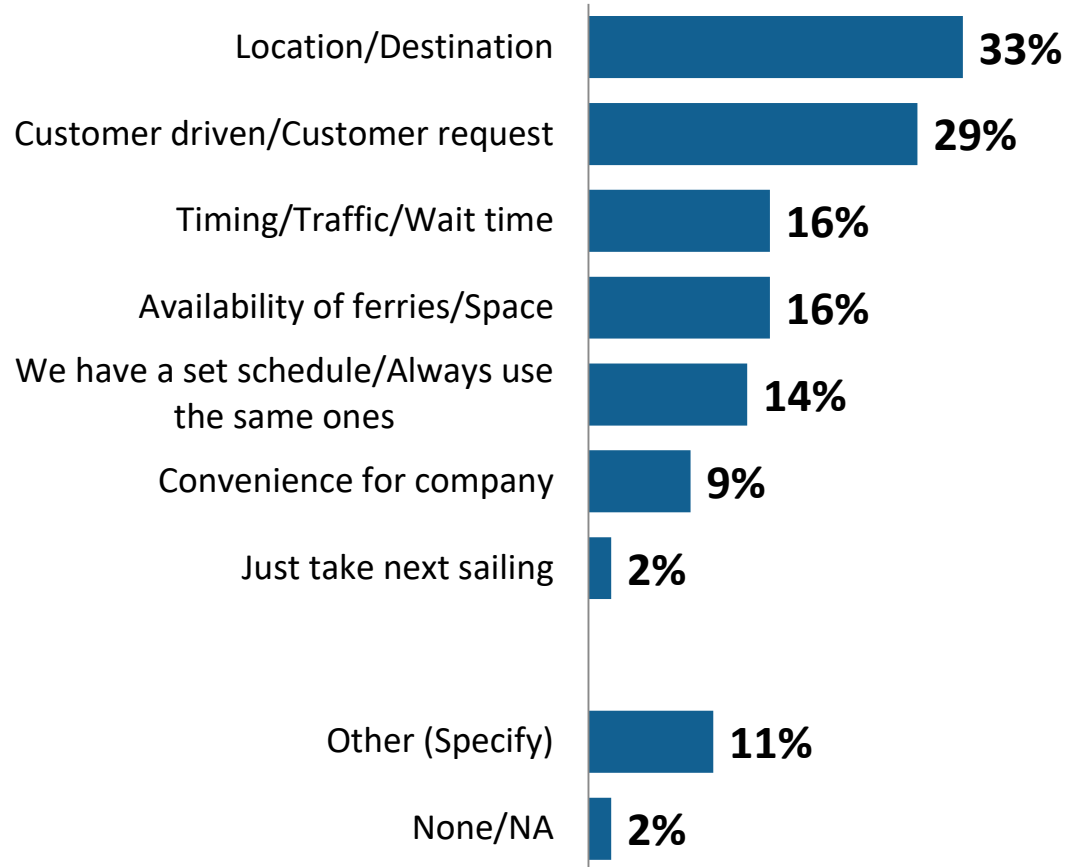
Q40. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

Travel Behavior - Influences



Location/destination (33%) has the greatest impact on sailing decision closely followed by Customer Driven / Customer Request (29%) in 2018.

Factors Influencing Decision - 2018



Q16. What factors impact your decision most as to which specific ferry sailing to take?

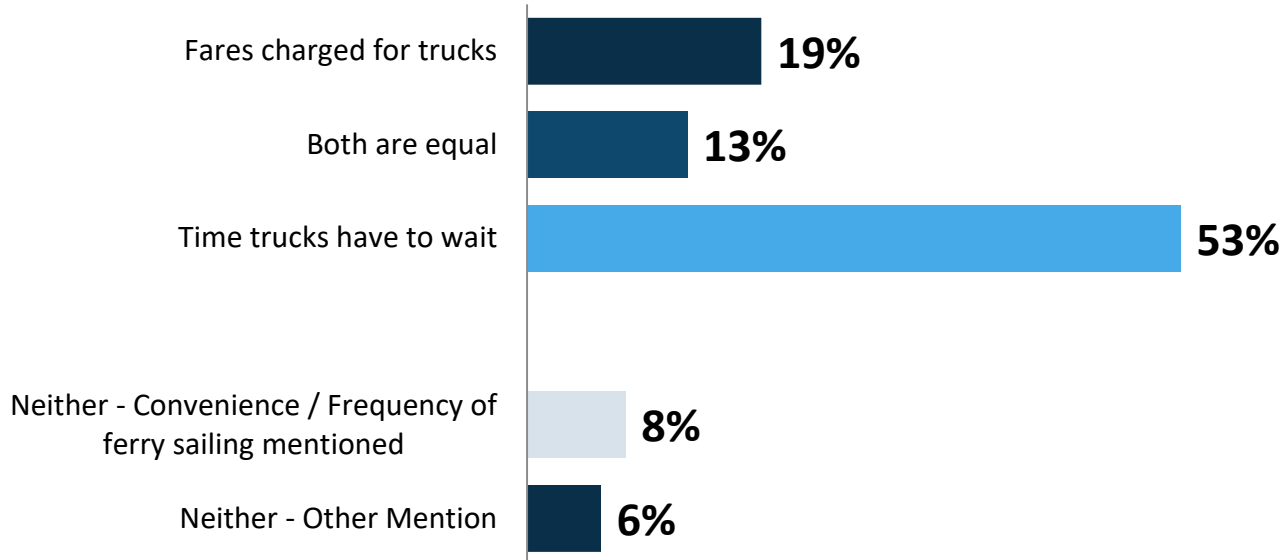
Travel Behavior – Fare vs. Waiting Impact



By a large margin, the time trucks have to wait (53%) has a much greater impact than the fares WSF charges for trucks (19%) on whether to use or not use WSF.

Fares vs. Waiting Time Impact on WSF Usage

(n=98)



Q17. Which of the following has a greater impact on your decision to use or not use Washington State Ferries? The fares charged for your trucks or the time your trucks have to wait at the terminal?



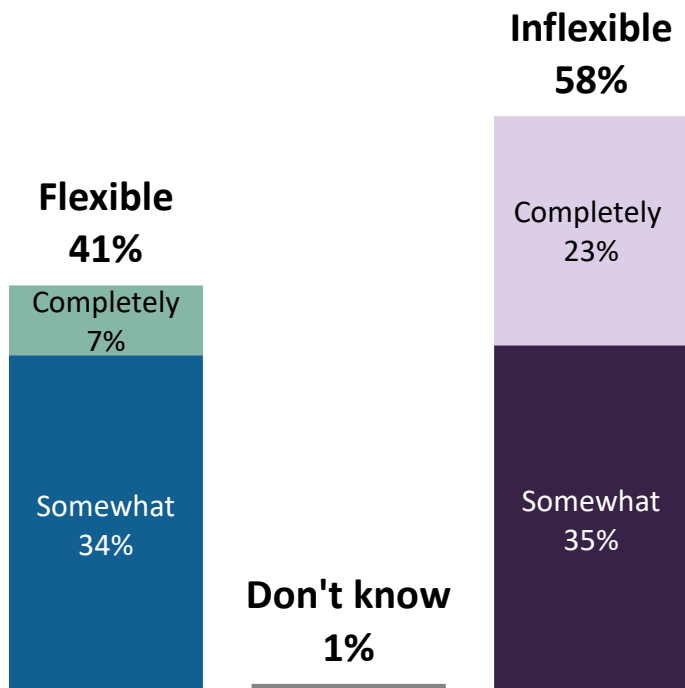
Travel Flexibility

Scheduling Flexibility

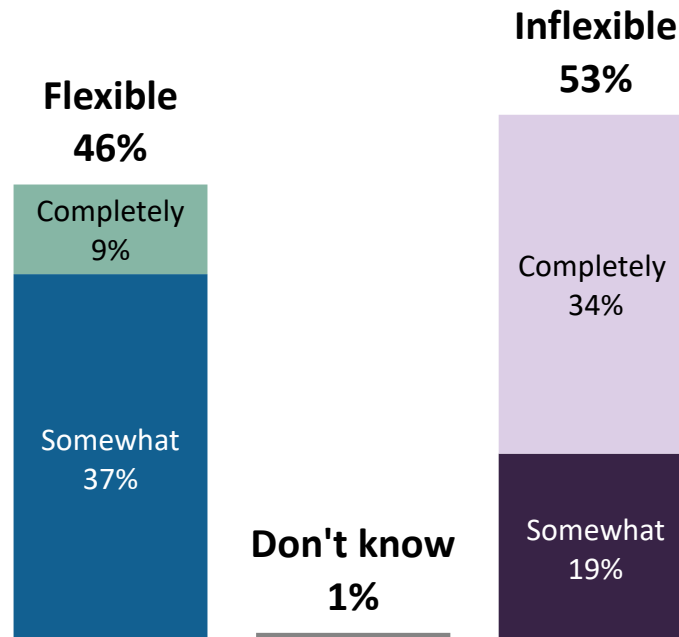


Almost four in ten (41%) have flexibility when selecting the ferry travel time to go, and almost half (46%) have flexibility when selecting which ferry travel day to use. However, there is a quarter to a third that are completely inflexible on time or day of week to use.

Time of Day - 2018



Day of Week - 2018



Q18. 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... ?

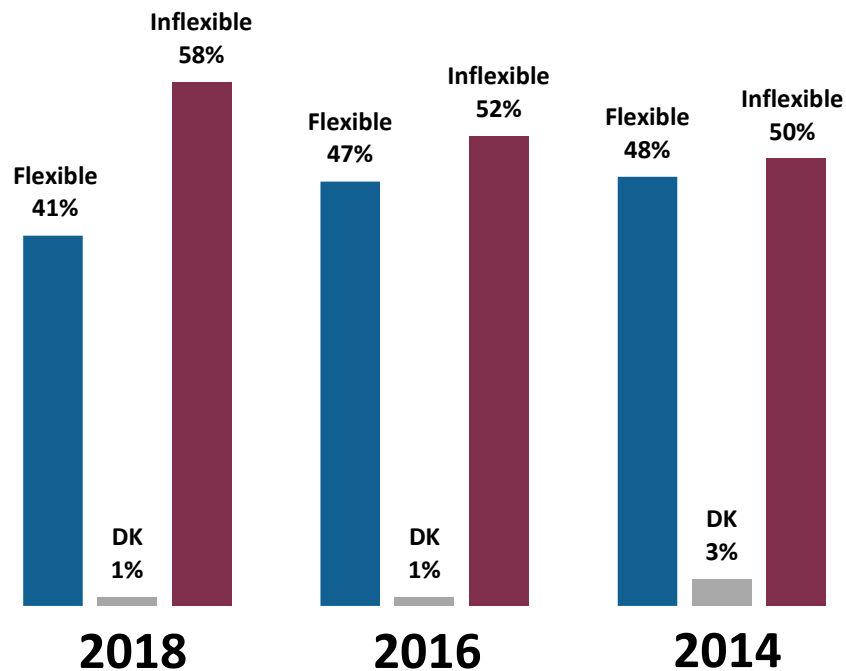
Q19. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?

Scheduling Flexibility – Comparison

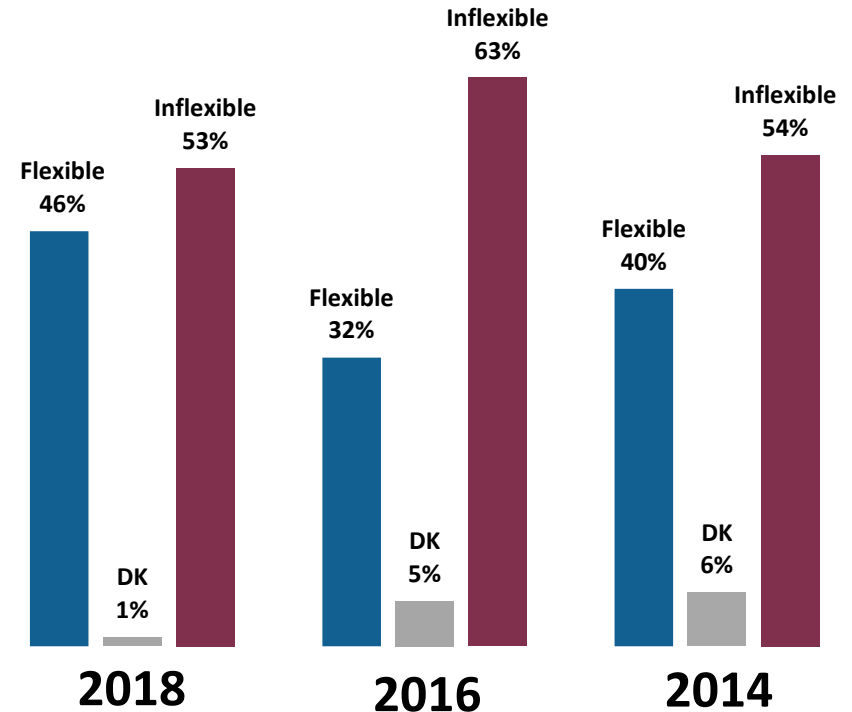


Flexibility in the time of day and day of the week has remained roughly the same between 2014/16 and 2018.

Time of Day



Day of Week



Q18. 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... ?

Q19. 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... ?

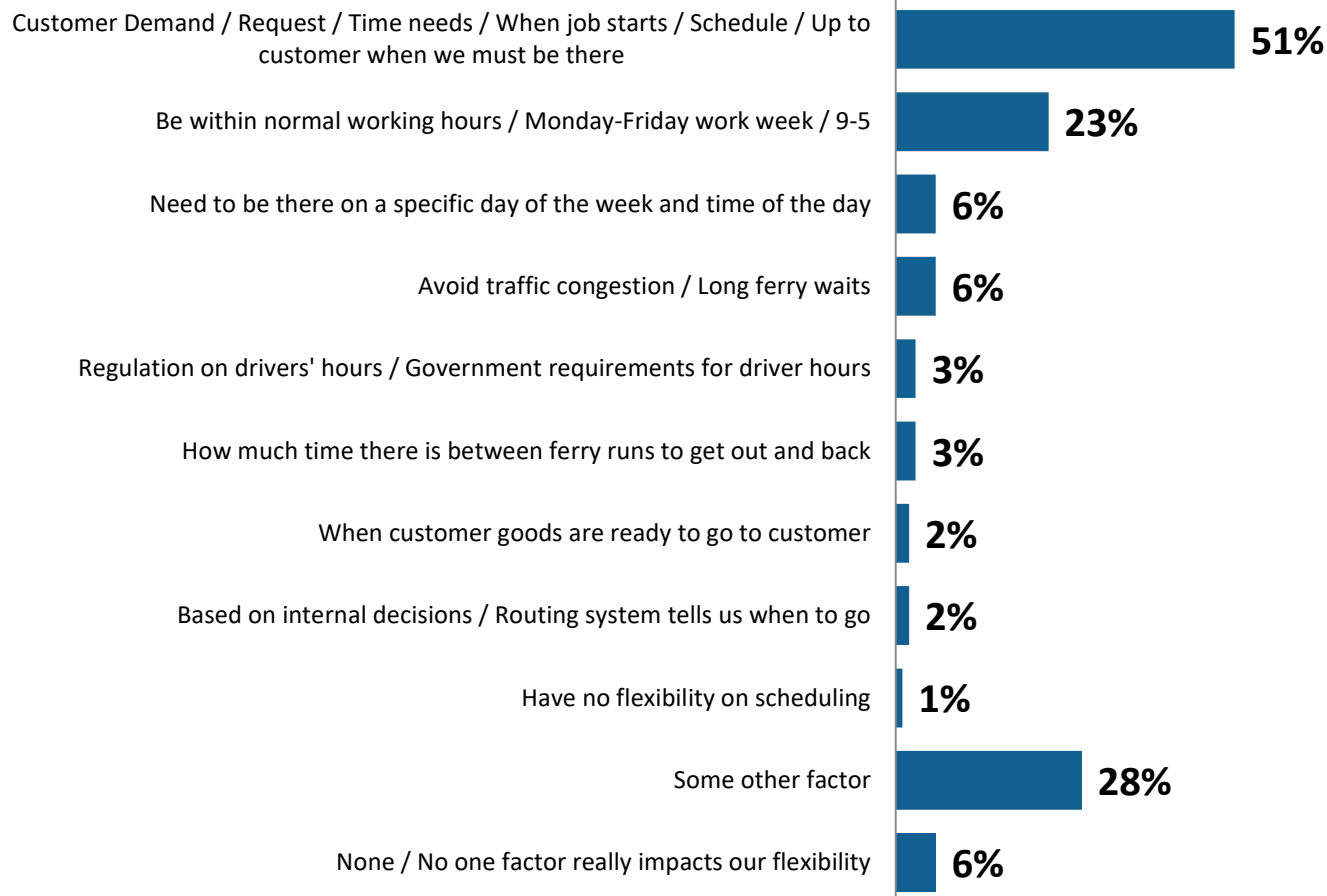
Scheduling Flexibility – Influencers



The greatest influencer on flexibility is the customer demands (51%) and working within normal working hours (23%).

Factors Affecting Flexibility

(n=99)



Q20. What factors affect your flexibility the most in terms of time of day or day of the week when you schedule freight truck trips on ferries?

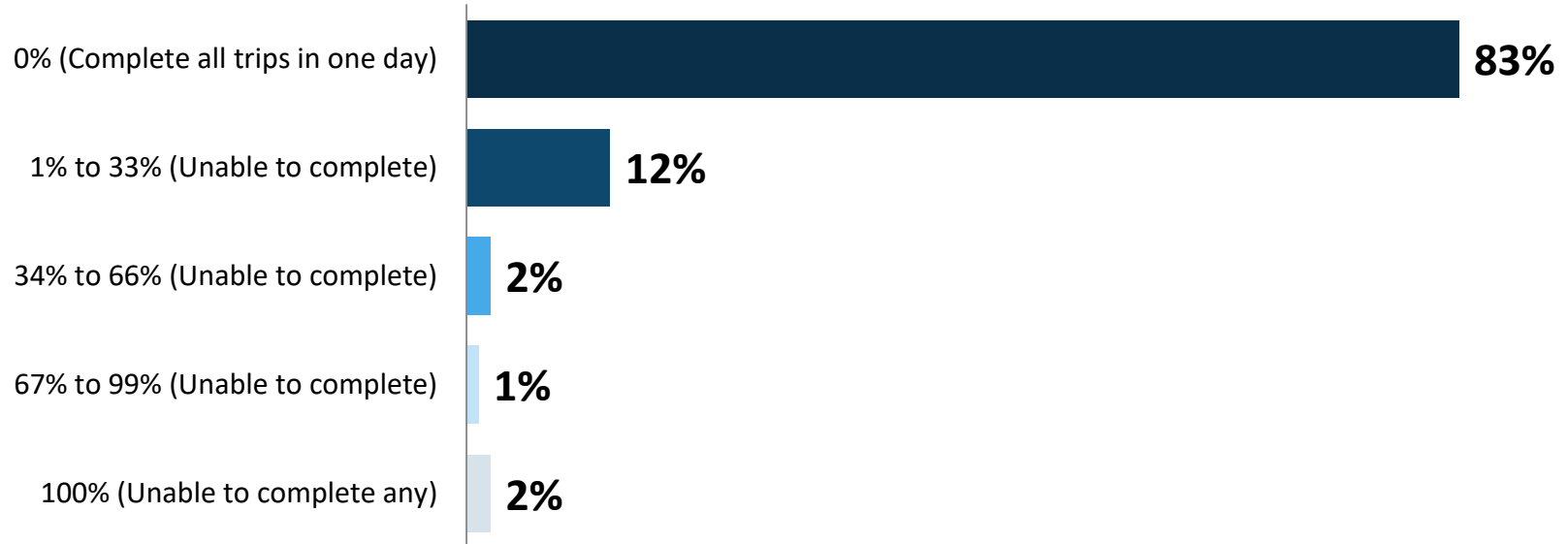
Scheduling Flexibility – Day Trips



The majority of companies (83%) when asked if the ferry schedule impacted their ability to get out and back in the same day said that it didn't.

Freight Trip Unable to Complete in One Day Due to Ferry Schedule

(n=98)



Q21. What percent of your freight trips are you unable to complete in one day because of the ferry schedules?



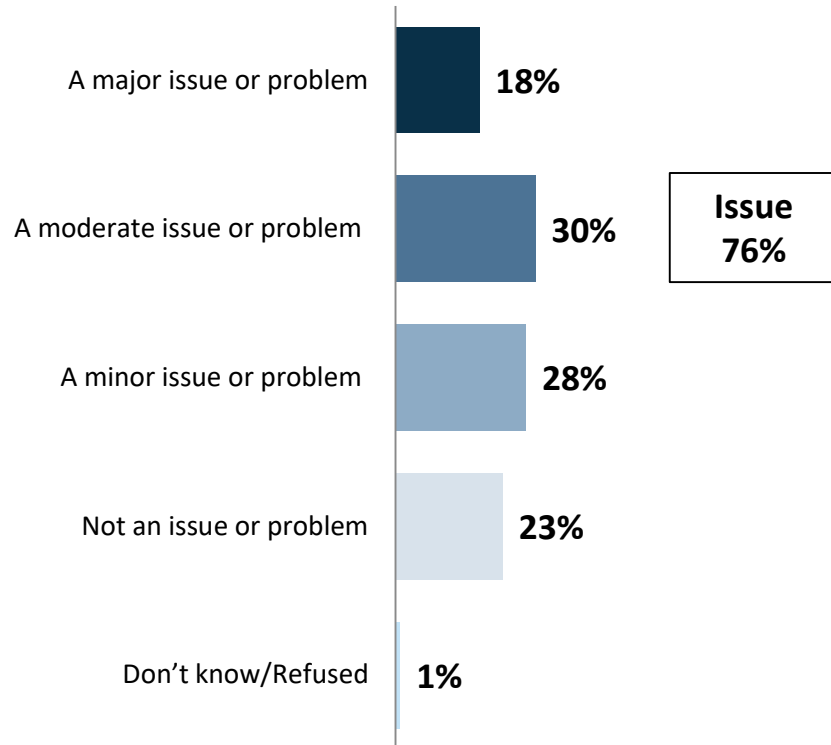
Wait Times

Wait Times



Three quarters (76%) of customers say wait times are at least a minor issue or problem. Anacortes/San Juans has the most mentions of long wait times with an average 1.6 boat wait, although sample sizes are very small.

Impact of Wait Times - 2018



Routes	% Experiencing long wait times n=71	Avg no. of Boats to wait through
Anacortes / San Juans	28%	1.6 [n=17]
Edmonds / Kingston	20%	1.4 [n=11]
Mukilteo / Clinton	14%	1.2 [n=8]
Fauntleroy / Vashon	10%	1.4 [n=5]
Seattle / Bainbridge	8%	1.3 [n=6]
Coupeville / Port Townsend	7%	1.5 [n=4]
Point Defiance / Tahlequah	7%	1.2 [n=5]
Interisland San Juans	3%	2.0 [n=2]
Seattle / Bremerton	1%	1.0 [n=1]
Vashon / Southworth	1%	1.0 [n=1]
All routes	--	
Don't Know	5%	

Q22. 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?

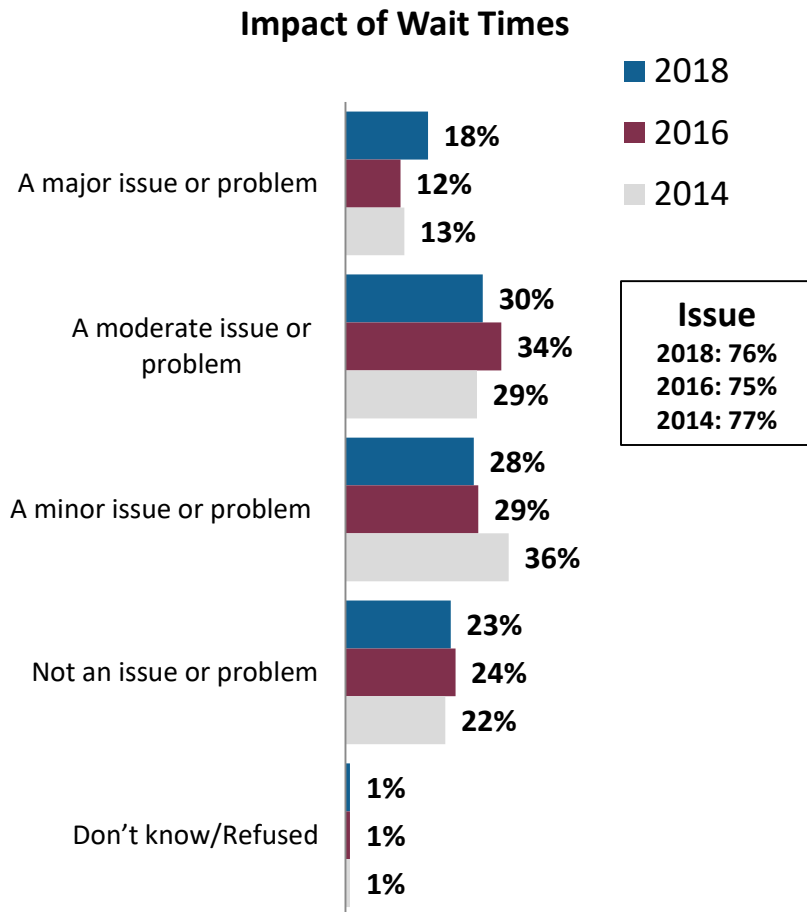
Q23. On what route or routes do your drivers experience excessively long wait times? **[MULTI RESPONSE]**

Q24. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Wait Times – Comparison



Similar to 2014/16, the issue of wait times impacts about three out of four companies in 2018. Per boat wait times are also similar on all the routes between 2016 and 2018.



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2018 n=71	2016 n=75	2018	2016
Anacortes / San Juans	28%	19%	1.6 [n=17]	1.9 [n=12]
Edmonds / Kingston	20%	16%	1.4 [n=11]	1.1 [n=10]
Mukilteo / Clinton	14%	13%	1.2 [n=8]	1.6 [n=9]
Fauntleroy / Vashon	10%	1%	1.4 [n=5]	1.0 [n=1]
Seattle / Bainbridge	8%	11%	1.3 [n=6]	1.0 [n=6]
Coupeville / Port Townsend	7%	4%	1.5 [n=4]	1.0 [n=3]
Point Defiance / Tahlequah	7%	--	1.2 [n=5]	--
Interisland San Juans	3%	3%	2.0 [n=2]	1.0 [n=2]
Seattle / Bremerton	1%	1%	1.0 [n=1]	1.0 [n=1]
Vashon / Southworth	1%	1%	1.0 [n=1]	--
All routes	--	3%	--	--
Don't know	5%	--	--	--

Q22. 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?

Q23. On what route or routes do your drivers experience excessively long wait times? [MULTI RESPONSE]

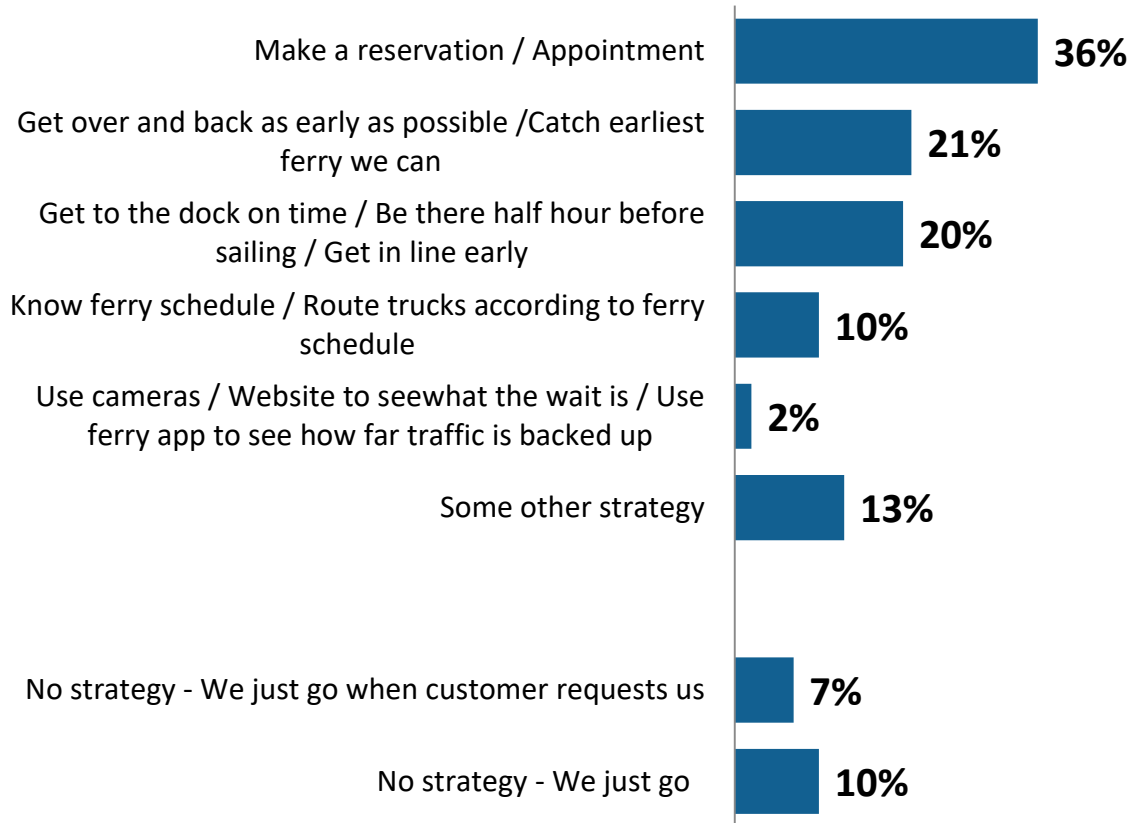
Q24. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Wait Times – Strategies



Over one in three (36%) deal with wait times by making ferry reservations, with one in five catching the earliest ferry or getting to the dock a half hour before sailing. A little less than one in five (17%) have no strategy.

Wait Time Strategies



Q25. What strategies, if any, do you use to minimize the amount of time you or your drivers spend waiting for a ferry at the dock?



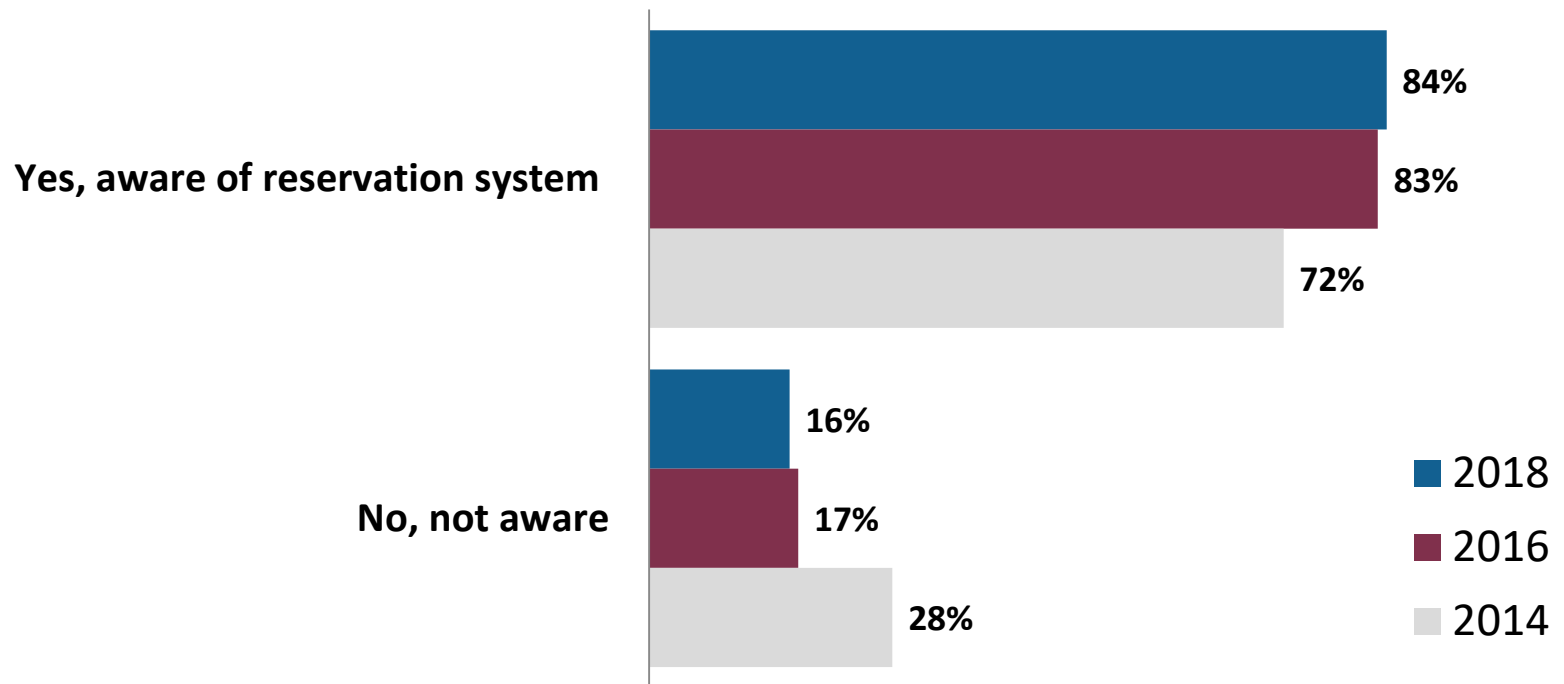
Reservations

Reservations – Awareness



Most companies (84%) were aware of WSF's vehicle reservation system in 2018. This is similar to 2016 (83%) but up from 2014 (72%).

Aware of Reservation System



Q26. Are you aware Washington State Ferries offers a vehicle reservation system?

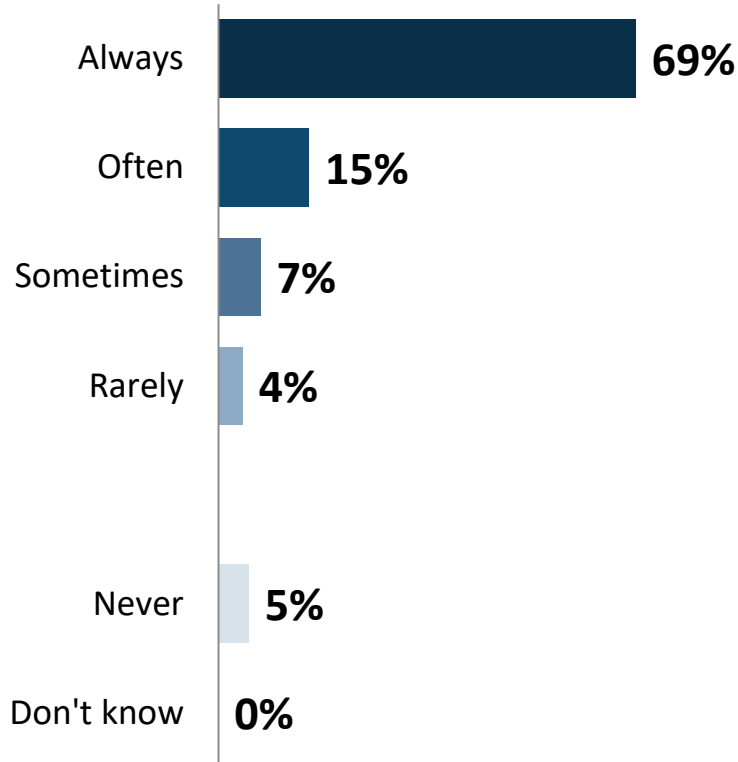
Reservations – Usage/Satisfaction



Of those customers who use the Coupeville/Port Townsend or Anacortes routes (n=55), the majority use the reservation system always (69%). Only 9% never or rarely use the system. Of those customers who use the reservation system (n=52), most (82%) say they are satisfied with the program.

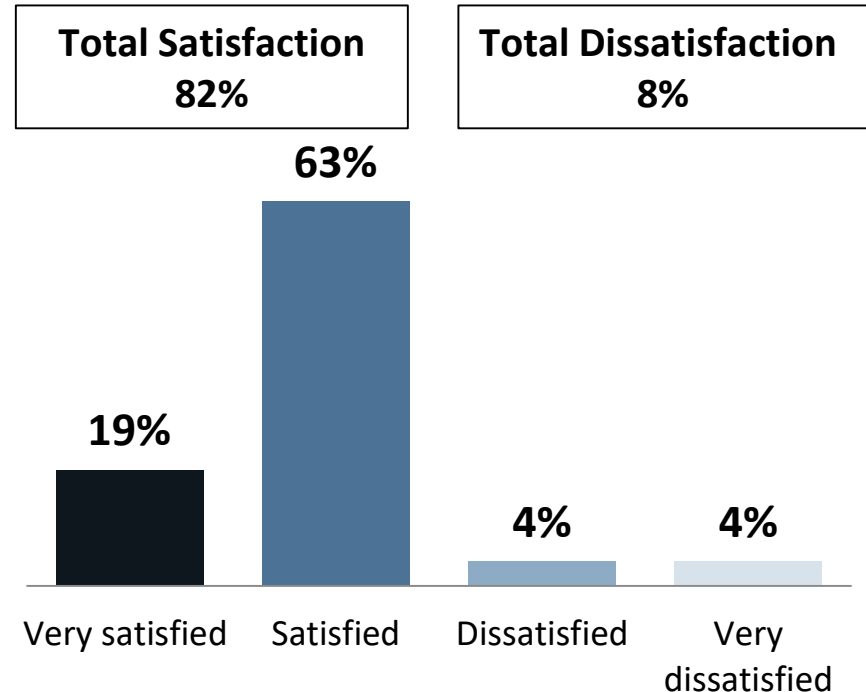
Reservation System Use - 2018

(n=55)



Satisfaction with Reservation System - 2018

(n=52)



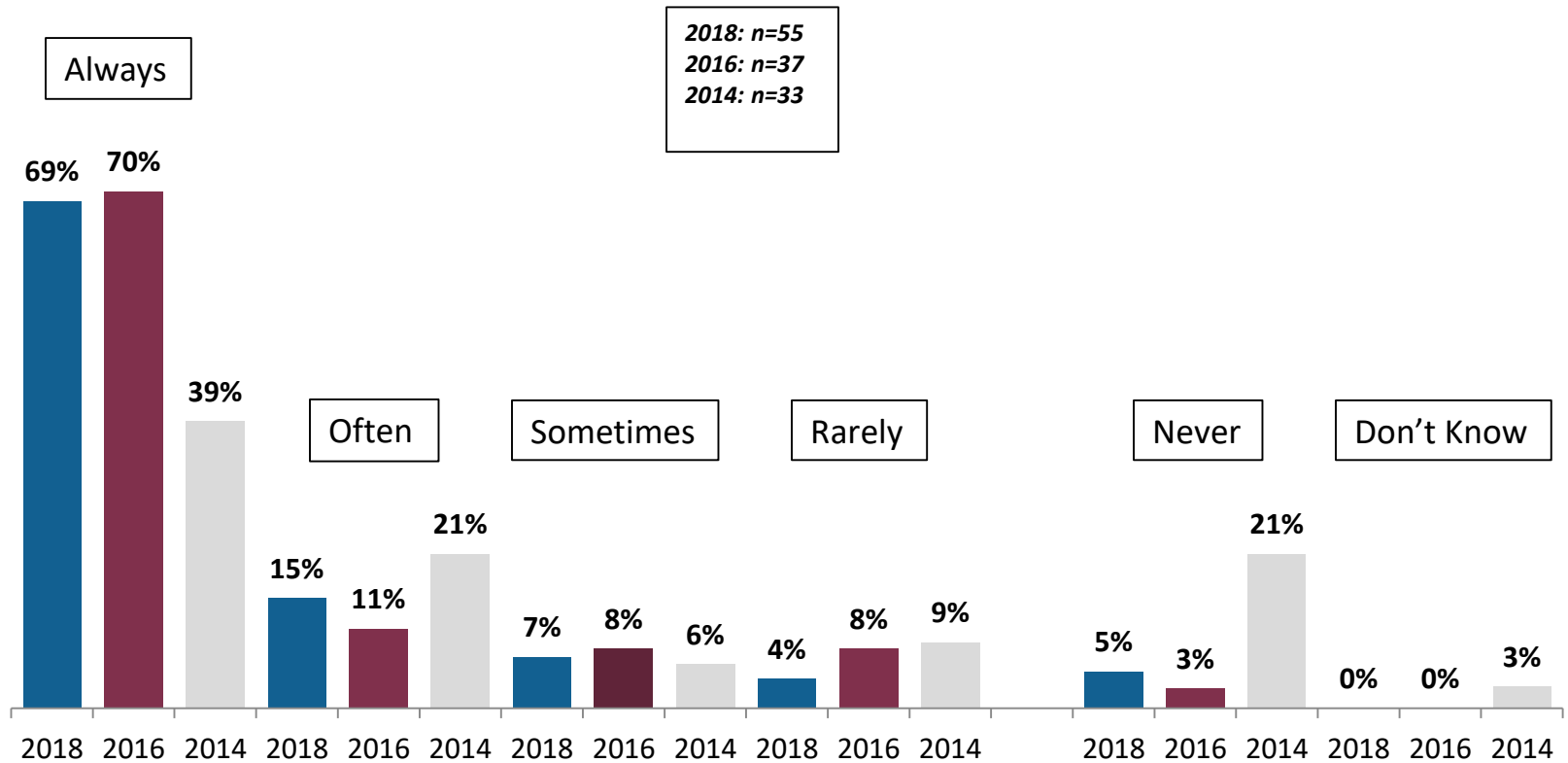
Q27. As you may know, Washington State Ferries offers a vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's vehicle reservation system?

Q28. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?

Reservations – Usage Comparison



The Coupeville/Port Townsend and Anacortes reservation system usage has remained constant between 2018 and 2016 but has increased dramatically form 2014.



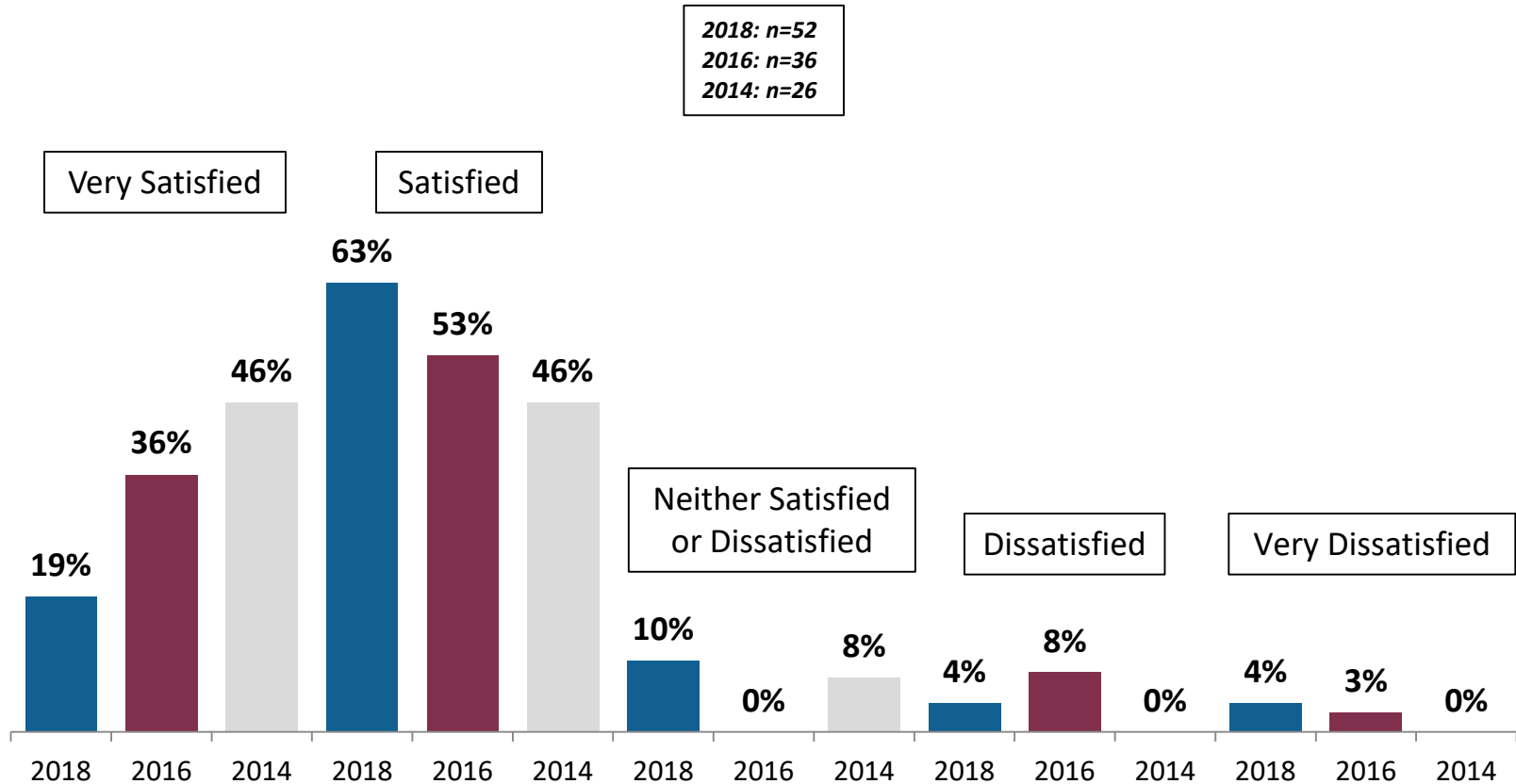
*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.

Q27. As you may know, Washington State Ferries offer a 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 vehicle reservation system? Would you say... ?

Reservations – Satisfaction Comparison



Overall satisfaction in 2018 (82%) has decreased from 2016 (89%) and 2014 (92%), but the total number of companies using the system has also increased.



*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.

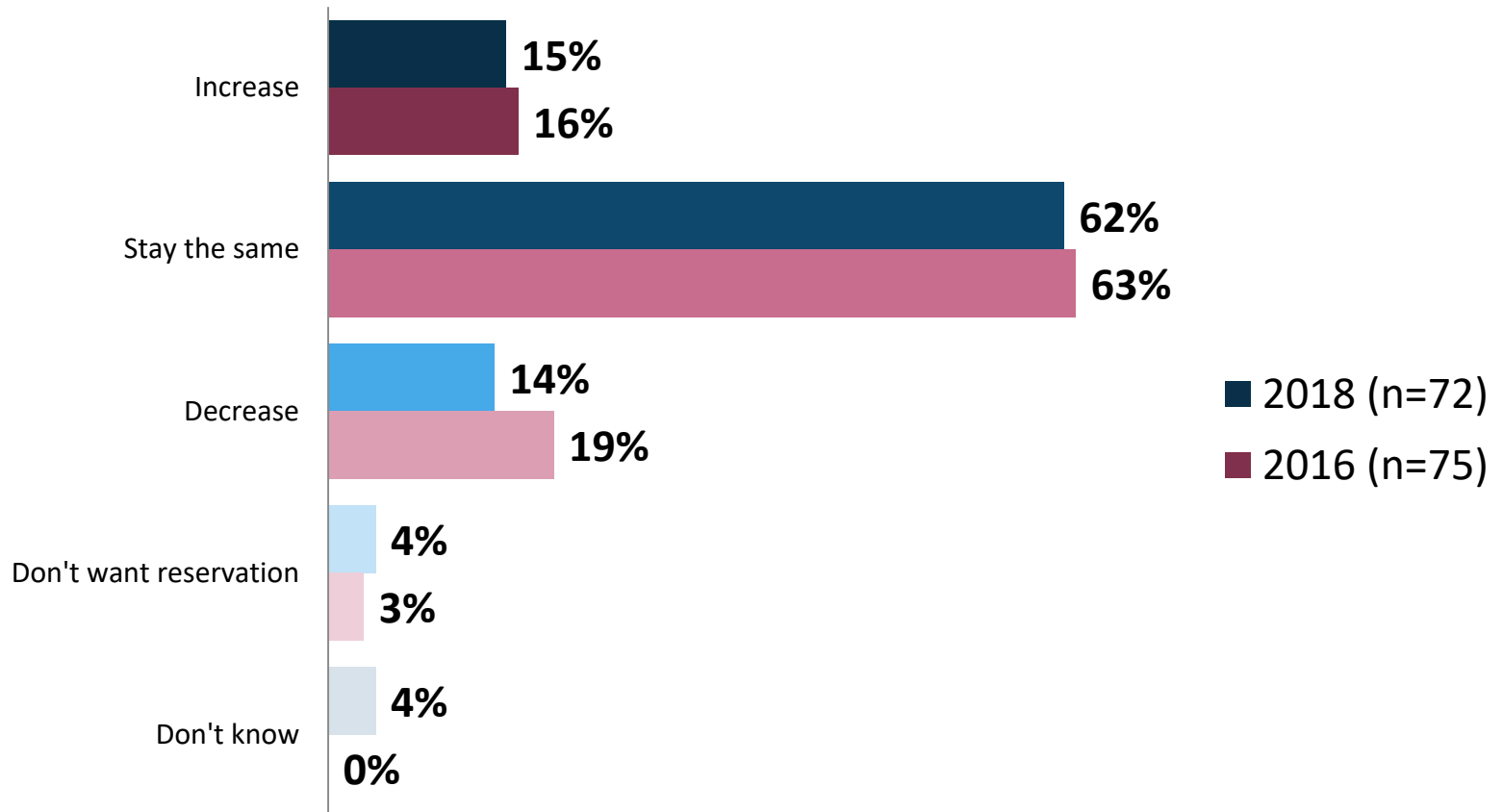
Q28. All things considered, how satisfied are you with the vehicle reservation system that WSF offers?

Reservations – Central Puget Sound



Of those customers who use Central Puget Sound ferry routes (n=72), two thirds (62%) would not change their ferry usage given a central sound reservation system, and only 15% would increase usage. This is similar to 2016.

Use WSF More w/ Reservation System - 2018
(n=72)



Q29. If all of the Central Puget Sound ferry routes had a reservation system, would your companies usage increase, decrease or remain the same?

Reservations – Central Sound Deposit Impact

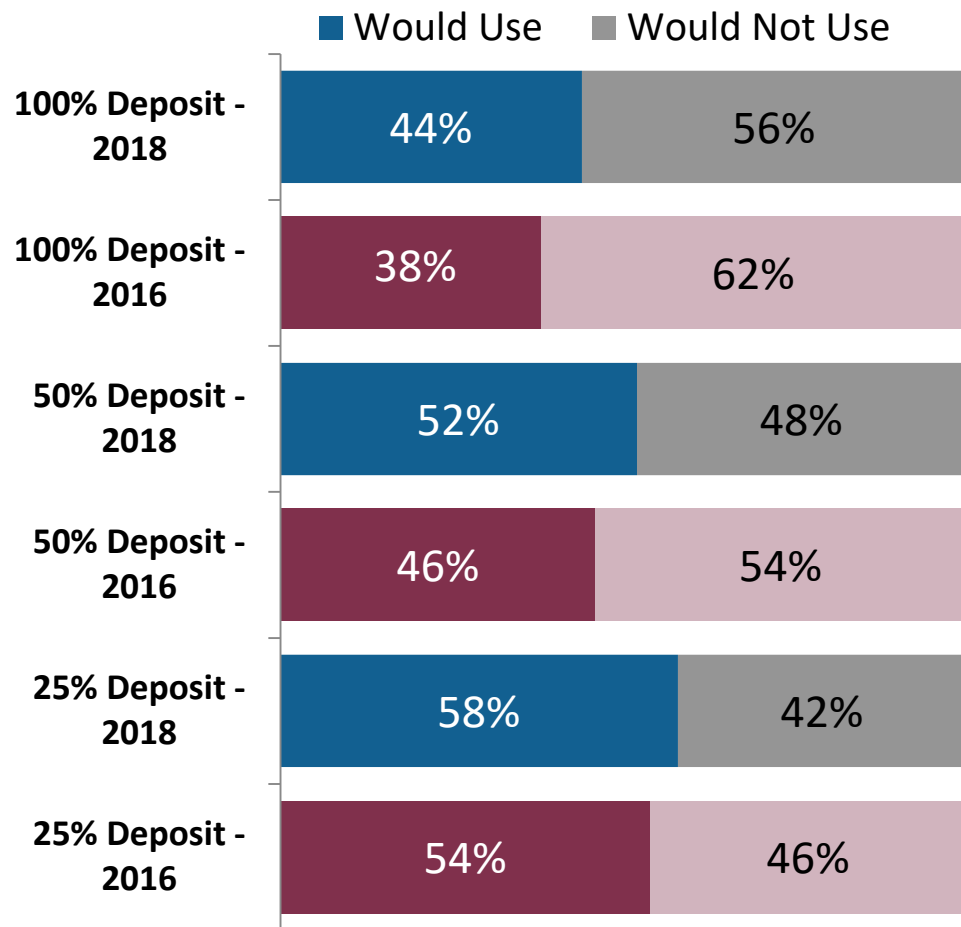


Of those who would be open to a vehicle reservation system for Central Puget Sound routes, about half say they would be likely to use the system as described with either a 50% or 25% deposit. Attitudes towards usage dependent on deposit level has not change between 2016 and 2018.

The current WSF vehicle reservation system has the following features:

- *Space is available for reservations up to two months ahead of the season schedule start date;*
- *No reservation deposit is necessary at the time the reservation is made;*
- *A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day;*
- *Reservations may be cancelled and/or changed once up to 5 pm of the prior day with no penalty;*
- *If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and*
- *The online reservation system will provide a 24 hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.*

Q30-32. How likely would your company be to use this vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say ... ?



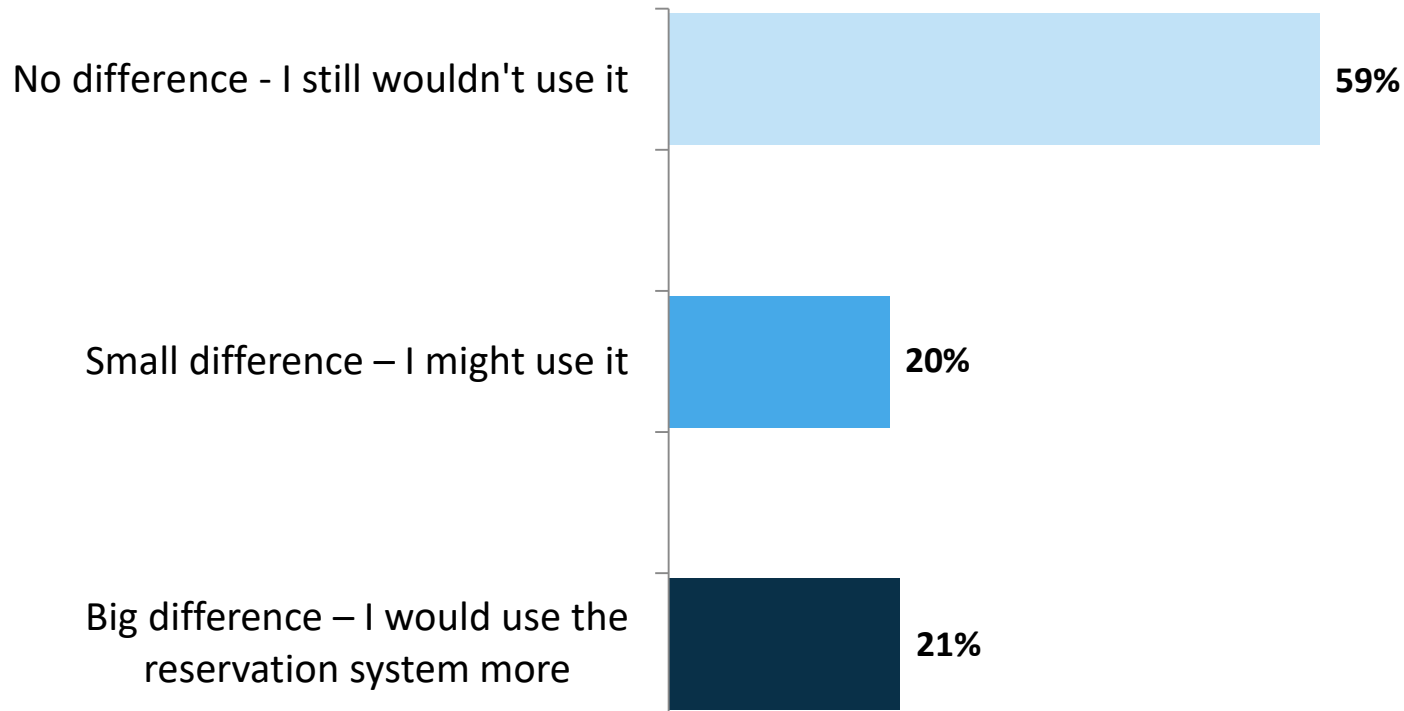
Reservations – Impact of Arriving 10 vs. 30 min.



Adding a 20% charge to reservations but only requiring the truck show up 10 minutes instead of 30 minutes before sailing would have a positive impact on four in ten (41%) of reservation users.

Show Up 10 min. vs 30 min for 20% Fee

2018: n=97



Q33 How much of a difference would it make if WSF charged 20% more for reservations but only required that you show up 10 minutes instead of 30 minutes prior to your sailing to receive your guaranteed space? Would you say that showing up 10 minutes instead of 30 minutes prior to your sailing to receive your guaranteed space would make a ... ?



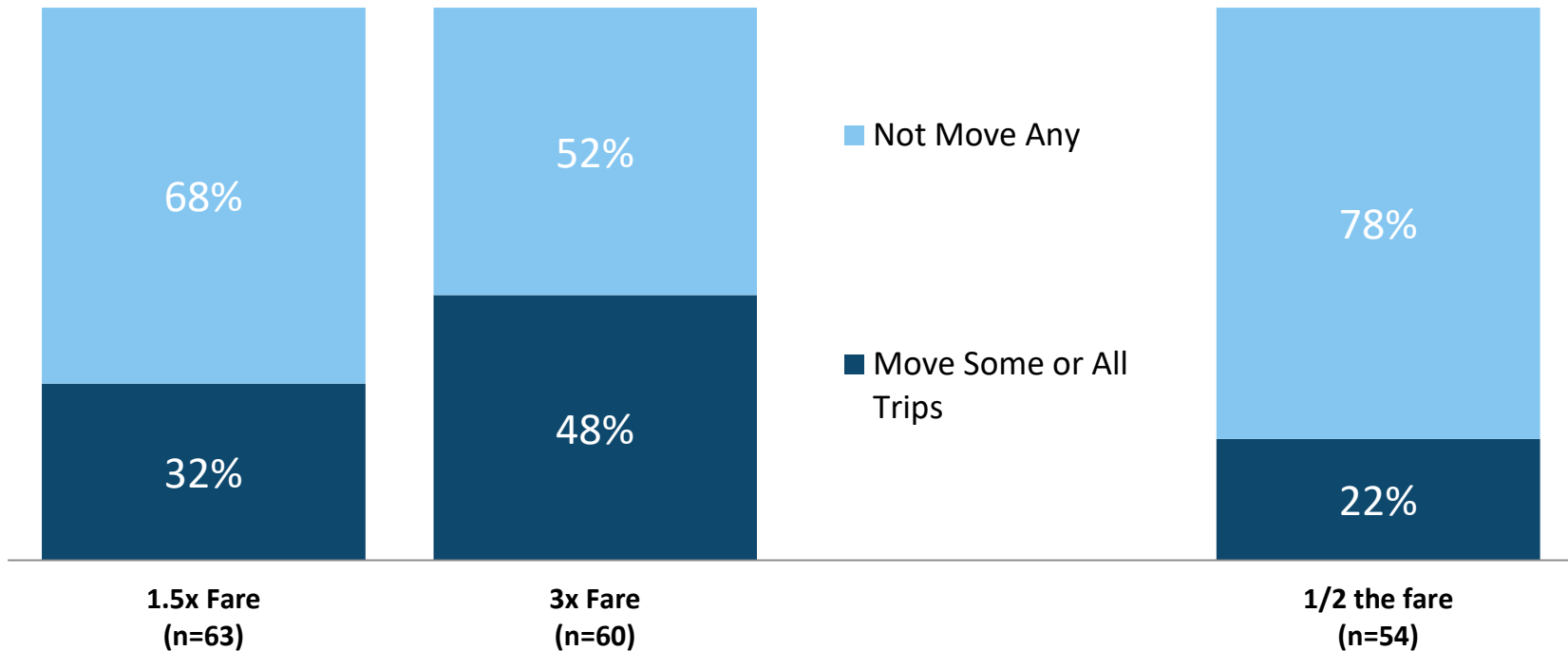
Potential Congestion Pricing

Congestion Pricing



Between one-third and one-half of all freight customers who travel in peak times say they would move trips to off-peak times if they were charged between 1.5 and 3 times the current freight vehicle fare. In comparison only two-in-ten would move trips to overnight if fares were cut in half for that time period. Those who would not move because of cheaper fares say they lack the flexibility to change the time.

Would Move Trips to Off Peak - 2018



Q34-35. If freight customers who use the ferry during peak travel periods were charged one and a half times/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

Q36. 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?

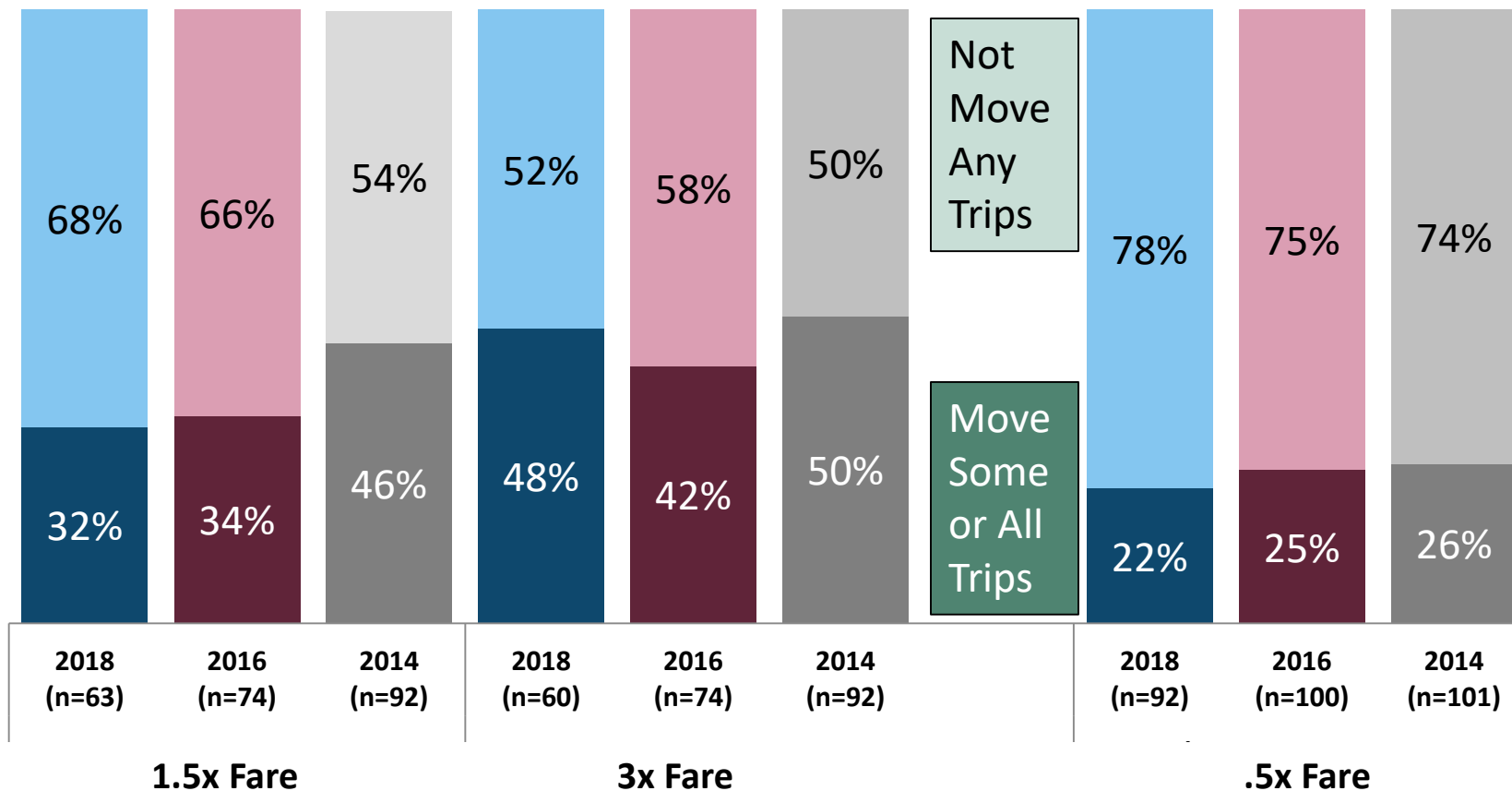
Q37. If the ferry system were to offer half-price fares for trucks between 9pm and 5am, what reasons might you have to continue using the ferries during the peak periods at those higher fares? (Multi-response)

Congestion Pricing – Comparison



The likelihood of moving trips has remained the same between 2016 and 2018.

Would Move Trips to Off Peak Times

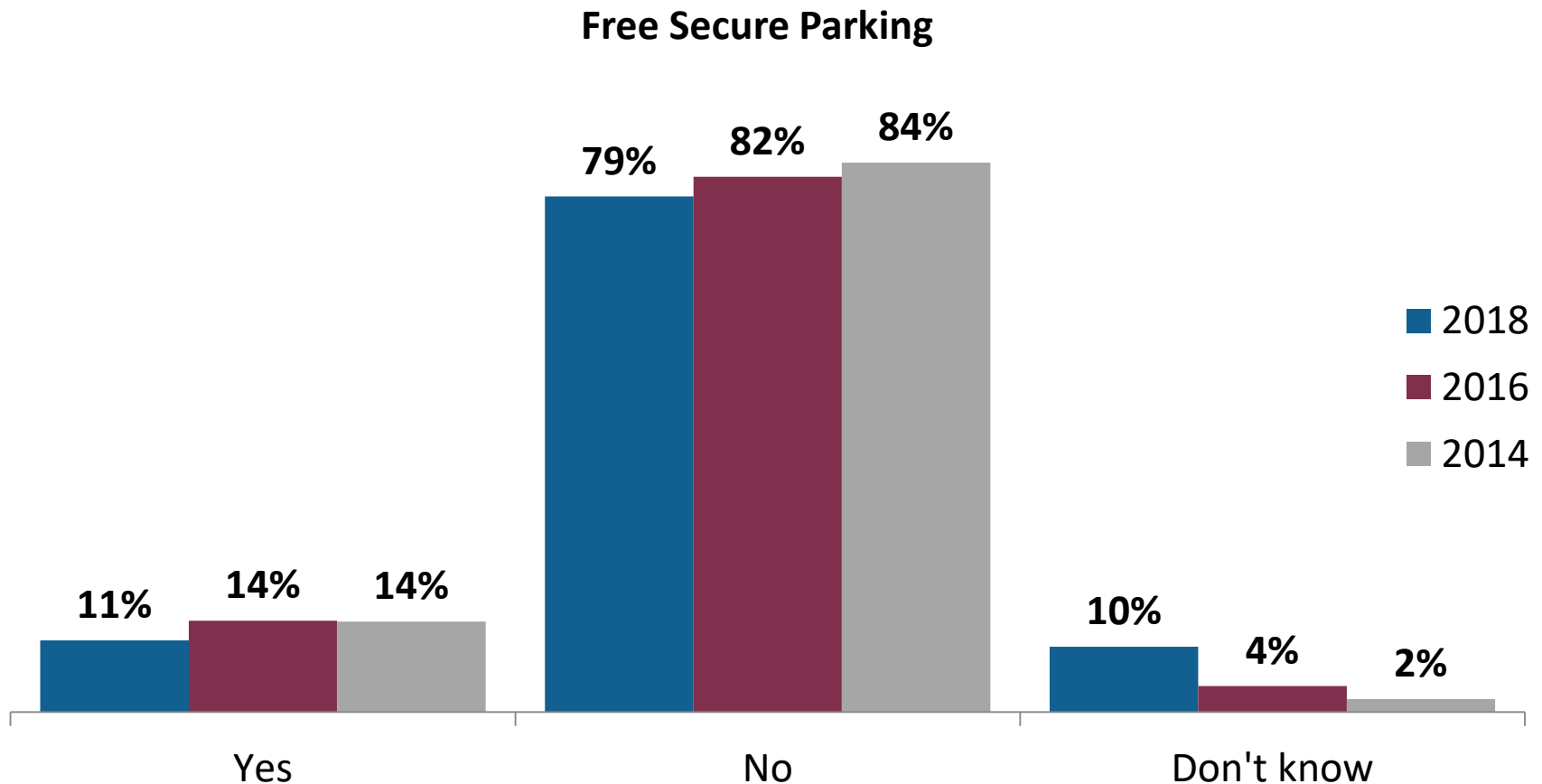


Q34-35. If freight customers who use the ferry during peak travel periods were charged one and a half times/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times? Q36. If freight customers on overnight sailings between 9pm and 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?

Congestion Pricing – Free Secure Parking



Consistent with the 2014/16 respondents, most freight customers in 2018 (79%) say a secure parking area on the arrival side would not make them more likely to schedule ½-priced late-night ferry sailings.



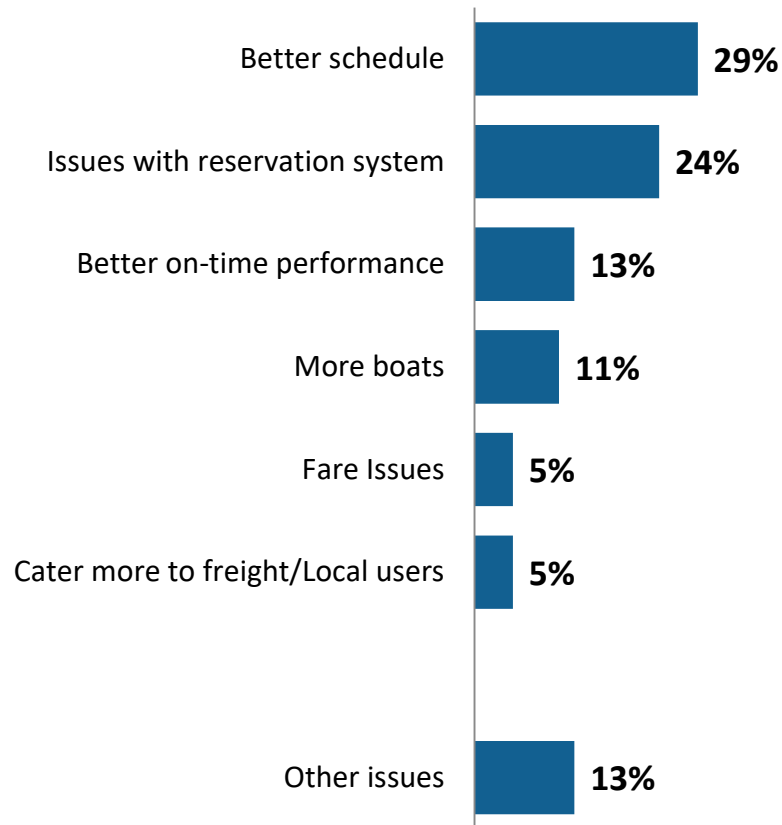
Q37. Would a free secure parking area on the arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?

Issues Facing WSF



Forty-five percent (45%) did not mention any specific problem with freight shipping on Washington State Ferries. Among those that do mention an issue (n=55), the top concerns center around better/more ferry runs or boats (40%) and the reservation system (24%).

Issues Facing WSF - 2018



Q48. What do you feel are the primary problems or issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better?



Appendix

Company Firmographic



Company Name	Fleet Size	Use WSF Size	Monthly Trips	Fleet Base Zip
ACCUMAR CORPORATION	1	1	24	98370
ACE HARDWARE OF FRIDAY HARBOR	4	4	5	98250
AIRGAS DRY ICE	7	1	2	98032
ALLIED BUILDING PRODUCTS CORP	25	10	8	98026
ALPINE COMMERCIAL TIRES AND RETREADERS INC.	1	1	2	98072
ALSCO	15	1	9	98032
AMERICAN STONE	5	1	2	84107
APRIA	3	1	2	98225
B & R DISTRIBUTORS INC	6	1	2	98233
BAINBRIDGE ISLAND REVIEW	8	6	62	98204
BAKER COMMODITIES INC	24	3	5	98178
BARNETT IMPLEMENT CO INC	7	7	6	98273
BARRY SWANSON TRUCKING INC	24	1	2	98362
BEKKEVAR LOGGING & TRUCKING INC	4	1	0	98382
BERT MATTER INC	21	3	2	98276
BRIGGS NURSERY	4	2	4	98541
<i>BUILDING SPECIALTIES</i>	10	10	2	98271
CARUSO PRODUCE INC	22	5	4	97062
CEMENT DISTRIBUTORS INC	32	32	12	98223
CENTURY TEL	12	12	20	98250
CONSOLIDATED SUPPLY CO	30	7	12	98107
CONTINENTAL VAN LINES INC	15	3	1	98106
CORT	25	25	16	98203
CRYSTALITE INC	5	1	24	98201
D & R EXCAVATING INC	4	2	12	98070

*Companies in **bold** responded to the survey in 2016 (2014 is bold/italics) as well

Company Firmographic



Company Name	Fleet Size	Use WSF Size	Monthly Trips	Fleet Base Zip
DEFENCE LOGISTICS AGENCY	13	13	28	98315
DENIS GRAY TRUCKING INC	13	1	0	98375
DICKERSON DISTRIBUTORS INC	17	7	24	98229
DIETRICH TRUCKING LLC	77	5	1	98661
DISDERO LUMBER COMPANY	6	5	8	97015
DRYWALL DISTRIBUTORS INC	15	15	0	98072
<i>DUNN LUMBER CO INC</i>	25	4	4	98148
ESARY ROOFING & SIDING	8	8	20	98233
FALCON CORP	19	19	50	98370
FIRST CALL PLUS OF WA LLC	15	15	8	98032
FOOD LIFELINE	22	4	0	98108
GAIL CONTRACTOR SERVICES	30	30	70	98223
GARDNER TRUCKING INC.	12	2	8	98409
GOS PERFORMANCE LLC	2	1	40	98245
GRACE HARBOR FARMS	2	1	4	98240
GRANITE PRECAST	4	4	3	98226
HENRY'S PLANT FARM	2	2	2	98223
HEURISTIC ENTERPRISES	4	2	24	99999
HUSKY PRE-HUNG DOOR CORP	3	3	4	98258
HUTTIG BUILDING PRODUCTS	20	1	20	98001
INTERNATIONAL WOOD PRODUCTS	15	15	10	98501
INTERNATIONAL WOOD PRODUCTS LLC	11	11	22	98501
ISLAND EXCAVATING INC	4	4	4	98245
ISLAND LUMBER & HARDWARE	7	2	70	98070
ISLAND PETROLEUM SERVICES INC	6	6	30	98250

*Companies in **bold** responded to the survey in 2016 (2014 is bold/italics) as well

Company Firmographic



Company Name	Fleet Size	Use WSF Size	Monthly Trips	Fleet Base Zip
ISLAND SPRING INC	1	1	16	98070
<i>JANES GYPSUM FLOORS INC</i>	7	7	0	98272
JUDD BLACK APPLIANCES	15	2	12	98273
K C P K TRUCKING INC	40	10	1	98244
<i>KEY CITY FISH COMPANY</i>	5	3	6	98368
LOGGERS & CONTRACTORS SUPPLY	7	2	4	98284
LOREN SINNER CEDAR CO	2	2	40	98070
LUDTKE PACIFIC TRUCKING INC	28	28	2	98226
MERCHANTS MOVING & STORAGE	9	6	4	98312
MIKE HAWKINGS TRUCKING	6	6	4	98284
MUTUAL MATERIALS CO	27	4	12	98005
MYRON WILLIAMS INC.	5	3	30	98250
NORTH CASCADE BUILDING	5	3	8	98201
NORTHHILL RESOURCES	9	4	10	98233
OLYMPIC GLASS & DOOR	1	1	1	98261
ORCAS ISLAND HARDWARE	1	1	12	98245
PACIFIC COCA-COLA BOTTLING	115	30	60	98005
PACIFIC PLANTS INC	6	6	8	98027
PENN COVE SHELLFISH LLC	7	5	160	98239
<i>PETE'S MILK DELIVERY</i>	12	1	8	98032
PETES TOWING SERVICE	7	7	0	98198
PIONEER BUILDERS SUPPLY CO INC	15	15	16	98409
PLYWOOD SUPPLY INC	4	4	20	98072
PUGET SOUND TRANSFER / JAYHAWK ENTERPRISES INC	20	4	15	98362
R & K FOODS INC	10	2	10	98134

*Companies in **bold** responded to the survey in 2016 (2014 is bold/italics) as well

Company Firmographic



Company Name	Fleet Size	Use WSF Size	Monthly Trips	Fleet Base Zip
R L & J VENTURES	14	14	240	99999
RELIABLE FLOOR COVERINGS	8	8	4	98020
SALVATION ARMY	1	1	2	98337
SCHOLTEN'S EQUIPMENT INC	5	2	0	98264
SEAPORT STEEL	10	7	15	98134
SECURITY CONTRACTOR SERVICES	8	8	1	98108
SERVICE PAPER CO	1	1	16	98390
SIMMONDS GLASS INC	7	7	24	98221
SNO ISLE REGIONAL LIBRARY SYST	7	1	28	98271
STIEBR'S FARMS INC	9	1	16	98597
SUPERLON PLASTICS	1	1	0	98421
T E WALRATH TRUCKING INC	35	7	4	98445
THE EVERETT STEEL COMPANIES	5	1	8	98201
TOM ASTROF CONSTRUCTION	4	4	10	98208
TRUSERV LOGISTICS CO	23	1	2	97477
US NAVY DEFENSE LOGISTICS AGCY DOD	16	5	15	98314
VAN WINGERDEN GREENHOUSES INC	8	8	8	98230
VASHON SAND & GRAVEL	7	7	8	98070
WASHINGTON TRUCKING INC	50	5	3	98223
WHITE TIMBER INDUSTRIES INC	44	44	2	98674
WILLIAMS HEATING INC	2	2	24	98070
WILLIAMS MECHANICAL INC	15	3	0	98201
WINDSOCK FARM	2	2	0	98261
YOUNG & SON WHOLESALE DIST LTD	5	5	0	99999
NO FRIM NAME GIVEN	23	1	0	98031

*Companies in **bold** responded to the survey in 2016 (2014 is bold/italics) as well

Survey Questionnaire



2018 WSF Freight Shipper Survey v4 (Executive Telephone Survey of 100 Freight Shippers)

[IF NAME AVAILABLE: May I please speak to (NAME ON LIST)?] Hello, my name is _____, I'm calling on behalf of the Washington State Transportation Commission. We are conducting a brief research study about freight trips your company makes on Washington State ferries.

SCREENING:

- 1.a [IF NO NAME:] May I please speak to the person in your company who is responsible for scheduling freight trips on Washington State Ferries?
1. Yes → Continue
 2. No → *Schedule call back if not available.* (Be sure and record person name for call back)
 3. Do not use Ferries for freight → **GO TO Q96 BEFORE TERMINATING**
 4. No trucks/No freight → **THANK AND TERMINATE SURVEY**
- 1.b [IF NAME AVAILABLE:] Are you the person in your company who is responsible for scheduling freight trips on Washington State Ferries?
1. Yes → Continue - (Say: This call may be monitored or recorded for quality control purposes) – Goto Q2
 2. Not right person → May I please speak to the person in your firm whose job responsibility entails some or all of scheduling freight truck trips on ferries? *Schedule call back if not available.*
 3. Do not use Ferries for freight → **GO TO Q96 BEFORE TERMINATING**
 4. No trucks/No freight → **THANK AND TERMINATE SURVEY**
2. Approximately how many trucks are in your fleet in total? An estimate is fine.
RECORD NUMBER: _____ (1-9999)
[INTERVIEWER NOTE: If asked what is a truck – they are the motorized part of either a self-contained truck/cargo area or separate tractor that pulls a trailer/container]
1. NONE/DON'T HAVE OWN FLEET → **SKIP TO Q96 BEFORE TERMINATING SURVEY**
 97. (DNR: Don't know → **SKIP TO Q96 BEFORE TERMINATING**)
3. And how many of those (INSERT Q2 RESPONSE) trucks use Washington State Ferries? Again, an estimate is fine.
RECORD NUMBER: _____
96. (DNR: We do NOT use WSF → **SKIP TO Q96 BEFORE TERMINATING**)
 97. (DNR: Don't know, but we do use WSF → **READ: An estimate is fine – Re-ask Q3**)
 98. (DNR: Don't know → **SKIP TO Q96 BEFORE TERMINATING**)

Survey Questionnaire (Cont'd)



4. How frequently do you use the Washington State Ferry system to transport goods and services by truck? Would you say ... [READ LIST]
1. Daily,
 2. Several times a week,
 3. At least once a month,
 4. At least once a quarter, or
 5. At least once a year?
 6. (DNR: Never → SKIP TO Q96 BEFORE TERMINATING)
5. Is the average number of ferry crossings made by your trucks different October through March than April through September?
1. Yes, different
 2. No, not different
6. Approximately how many one-way crossings are made by your trucks in a typical month? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings. An estimate is fine.
RECORD NUMBER: _____ [NOTE: Less than once a month=0] (0-999)
97. (DNR: Don't know, but we do use WSF → READ: An estimate is fine.)
7. Thinking only of those (INSERT Q3 RESPONSE) trucks and tractor trailers that use Washington State Ferries, how many are in each of the following size categories? How many are ... [READ LIST]
[IF NEEDED CLARIFY: Truck length is the total length of the truck and trailer - that includes trailers you pick up]
[IF Don't know] → [READ: An estimate is fine]
[READ LENGTH CATEGORY AND RECORD NUMBER OF TRUCKS IN EACH LENGTH CATEGORY]
- a) 0 to 21 feet _____ no. of trucks 97. (DNR: Don't know)
 - b) 22 to 29 feet _____ no. of trucks 97. (DNR: Don't know)
 - c) 30 to 39 feet _____ no. of trucks 97. (DNR: Don't know)
 - d) 40 to 49 feet _____ no. of trucks 97. (DNR: Don't know)
 - e) 50 to 69 feet _____ no. of trucks 97. (DNR: Don't know)
 - f) 70 feet or more _____ no. of trucks 97. (DNR: Don't know)
- (TOTAL TO EQUAL Q3)

Survey Questionnaire (Cont'd)



8. In what zip code is the majority of your fleet based in? _____ Zip Code
99999. (DNR: Don't know)
[INTERVIEWER NOTE: Fleet based in means where they park the majority of their vehicles overnight]

ACTIVITY

9. What ferry routes do you use for moving freight? **[INTERVIEWER NOTE: PROBE WITH "What other ferry routes do you use to move freight?" - READ LIST IF NECESSARY – PHONIC SPELLING IS IN BOLD TYPE]**
1. Seattle / Bainbridge
 2. Seattle / Bremerton
 3. Edmonds / Kingston
 4. Mukilteo [**muck-ij-TEE-o**] / Clinton
 5. Fauntleroy [**FONT-le-roy**] / Vashon [**VASH-on**]
 6. Fauntleroy [**FONT-le-roy**] / Southworth
 7. Point Defiance / Tahlequah [**TAL-i-kwah**]
 8. Coupeville [**COOP-yil**] / Port Townsend
 9. Anacortes [**ann-a-COR-tiss**] / San Juans [**san wahns**]
Includes Shaw, Orcas [**OR-cuss**], Lopez, and Friday Harbor
 10. Interisland San Juans [**san wahns**]
Includes Shaw, Orcas [**OR-cuss**], Lopez, and Friday Harbor
 11. Vashon [**VASH-on**] / Southworth
 12. Anacortes [**ann-a-COR-tiss**] / Sidney
 13. (DNR: Don't know/Refused) → **SKIP TO Q11**

Survey Questionnaire (Cont'd)



[IF MORE THAN ONE ROUTE MENTIONED IN Q9 ASK FOLLOW-UP Q10]

10. And of those routes, which ferry route do you use most often? [CIRCLE ONLY ONE OF THE ROUTES MENTIONED IN Q9]
1. Seattle / Bainbridge
 2. Seattle / Bremerton
 3. Edmonds / Kingston
 4. Mukilteo [muck-i-TEE-o] / Clinton
 5. Fauntleroy [FONT-le-roy] / Vashon [VASH-on]
 6. Fauntleroy [FONT-le-roy] / Southworth
 7. Point Defiance / Tahlequah [TAL-i-kwah]
 8. Coupeville [COOP-vii] / Port Townsend
 9. Anacortes [ann-a-COR-tiss] / San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
 10. Interisland San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
 11. Vashon [VASH-on] / Southworth
 12. Anacortes [ann-a-COR-tiss] / Sidney
 13. (DNR: Don't know/Refused)

[RESUME ASKING ALL]

11. Which of the following categories best describes your company's line of business? Are you a ... [READ & ROTATE 1-15 OF LIST]
1. Long-haul trucking
 2. City delivery trucking
 3. Truck load trucking
 4. LTL trucking
 5. Parcel trucking
 6. Retail trade
 7. Wholesale trade
 8. Logistics, warehousing, or third party logistics (3PL)
 9. Manufacturing
 10. Agribusiness or fishing
 11. Timber or wood products
 12. Mining
 13. Waste management
 14. Construction
 15. Military
 16. Other [SPECIFY _____]
 97. (DNR: Don't Know)

Survey Questionnaire (Cont'd)



12. Using the ferries, which location type do you deliver freight to? Do you deliver to ... [READ & ROTATE 1-6 OF LIST] [ACCEPT MULTIPLE SELECTIONS]?
1. Residential locations,
 2. Retail or commercial businesses,
 3. Warehouses,
 4. Construction sites,
 5. School/Educational locations,
 6. Military locations,
 7. Some other type of place or location [SPECIFY _____]
 97. (DNR: Don't Know)

[IF MORE THAN ONE LOCATION MENTIONED IN Q12 ASK Q13 FOLLOW-UP]

13. And, which location type do you deliver the most freight to? [READ LIST IF NECESSARY]
1. Residential locations
 2. Retail or commercial businesses
 3. Warehouses
 4. Construction sites
 5. School/Educational locations
 6. Military locations
 7. Some other type of place or location [SPECIFY _____]
 97. (DNR: Don't Know)

14. In the next 12 months do you foresee your freight delivery business use of the ferries ... [READ LIST]?
1. Growing a lot,
 2. Growing a little,
 3. Remaining the same,
 4. Shrinking a little, or
 5. Shrinking a lot?
 97. (DNR: Don't Know)

Survey Questionnaire (Cont'd)



SCHEDULING

15. In a typical month, how many of your [INSERT NUMBER FROM Q6] ferry freight trips are taken during ...
[READ "a" FOLLOWED BY "b" & "c" ALOUD AND RECORD NUMBER – NUMBER SHOULD ADD UP TO Q6 TOTAL] ?
- a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _____ Record no of PEAK HOUR trips
 - b. MIDDAY [IF NEEDED: generally 9am to 3pm] _____ Record no of OFF PEAK DAY trips
 - c. NIGHT [IF NEEDED: generally 7pm to 6am] _____ Record no of OFF PEAK NIGHT trips
- [Total = Q6]

[IF Q15A > 0 THEN PEAK_HOUR_TRIPS = TRUE FOR USE IN Q34INTRO]

[ASK ALL Q16]

16. What factors impact your decision the most as to which specific ferry sailing to take? [ACCEPT UP TO 3 RESPONSES]
- 1. Location / destination of the delivery
 - 2. Avoid traffic congestion / Avoid long ferry wait times
 - 3. Customer driven / Customer request specific delivery time
 - 4. We have a set schedule / Always use the same ferry sailings
 - 5. Availability of ferry space for our trucks
 - 6. We just take the next sailing time
 - 7. Convenience for our company/drivers
 - 8. Some other factor [SPECIFY _____]
 - 96. None / No factor really impact our decision
 - 97. Don't Know
17. Which of the following has a greater impact on your decision to use or not use Washington State Ferries? The fares charged for your trucks or the time your trucks have to wait at the terminals? [REPEAT IF NECESSARY]
- 1. Fares charged for trucks
 - 2. Time trucks have to wait at terminals
 - 3. (DNR: Both are equal)
 - 4. (DNR: Neither- Convenience/Frequency of Ferry Sailing Mentioned)
 - 5. (DNR: Neither – Other Mentioned – Specify _____)
 - 6. (DNR: Don't Know/Refused)

Survey Questionnaire (Cont'd)



18. 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...
[READ LIST]
1. Completely flexible,
 2. Somewhat flexible,
 3. Somewhat inflexible, or
 4. Completely inflexible?
 5. (DNR: Don't know)
19. 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...? **[READ LIST]**
1. Completely flexible,
 2. Somewhat flexible,
 3. Somewhat inflexible, or
 4. Completely inflexible?
 5. (DNR: Don't know)
20. What factors affect your flexibility the most in terms of time of day or day of the week when you schedule freight truck trips on ferries? **[ACCEPT UP TO 3 RESPONSES]**
1. Customer demand/request/time needs/when job starts/schedule/Up to customer when we must be there
 2. Need to be there on a specific day of the week and time of the day
 3. Regulation on drivers' hours/Government requirements for driver hours
 4. Be within normal working hours / Monday-Friday work week/9-5
 5. When our trucks are available to be used
 6. When customer goods are ready to go to customer
 7. Based on internal decisions / routing system tell us when to go
 8. Up to drivers' discretion
 9. If we have enough sales for that route / enough stops per run
 10. How much time there is between ferry runs to get out and back
 11. Avoid traffic congestion / long ferry waits
 12. Have NO Flexibility on scheduling
 13. Some other factor **[SPECIFY _____]**
 96. None / No one factor really impact our flexibility
 97. Don't Know

Survey Questionnaire (Cont'd)



21. What percent of your freight trips are you unable to complete in **ONE DAY** because of the ferry schedules?

_____ Percentage unable to complete in one day due to ferry schedules

97. (DNR: Don't know)

PEAK TIME PERIOD TRIPS

22. 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? Would you say it is ... [\[READ LIST\]](#)

1. A major issue or problem,
2. A moderate issue or problem,
3. A minor issue or problem, or
4. Not an issue or problem? → **SKIP TO Q25**
5. (DNR: Don't know/Refused) → **SKIP TO Q25**

23. On what route or routes do your drivers experience excessively long wait times? [\[MULTI RESPONSE\]](#)

1. Seattle / Bainbridge
2. Seattle / Bremerton
3. Edmonds / Kingston
4. Mukilteo [muck-il-TEE-o] / Clinton
5. Fauntleroy [FONT-le-roy] / Vashon [VASH-on]
6. Fauntleroy [FONT-le-roy] / Southworth
7. Point Defiance / Tahlequah [TAL-i-kwah]
8. Coupeville [COOP-vil] / Port Townsend
9. Anacortes [ann-a-COR-tiss] / San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
10. Interisland San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. Vashon [VASH-on] / Southworth
12. Anacortes [ann-a-COR-tiss] / Sidney
13. None [**SKIP TO Q26**]
14. (DNR: Don't know/Refused) → **SKIP TO Q25**

Survey Questionnaire (Cont'd)



[FOR EACH ROUTE MENTIONED IN Q23 ASK Q24 FOLLOW-UP]

24. Currently, what is the average number of boats you or your drivers have to wait through on ... [READ ROUTES MENTIONED IN Q23 ONE AT A TIME AND RECORD ANSWER] route? An estimate is fine.

[DISPLAY ONLY ROUTES MENTIONED IN Q23] _____ Record average no. of boats

1. _____ [Avg # of boats] - Seattle / Bainbridge
2. _____ [Avg # of boats] - Seattle / Bremerton
3. _____ [Avg # of boats] - Edmonds / Kingston
4. _____ [Avg # of boats] - Mukilteo [muck-il-TEE-o] / Clinton
5. _____ [Avg # of boats] - Fauntleroy [FONT-le-roy] / Vashon [VASH-on]
6. _____ [Avg # of boats] - Fauntleroy [FONT-le-roy] / Southworth
7. _____ [Avg # of boats] - Point Defiance / Tahlequah [TAL-i-kwah]
8. _____ [Avg # of boats] - Coupeville [COOP-vil] / Port Townsend
9. _____ [Avg # of boats] - Anacortes [ann-a-COR-tiss] / San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
10. _____ [Avg # of boats] - Interisland San Juans [san wahns]
Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. _____ [Avg # of boats] - Vashon [VASH-on] / Southworth
12. _____ [Avg # of boats] - Anacortes [ann-a-COR-tiss] / Sidney
13. (DNR: Don't know/Refused)

25. What strategies do you use to minimize the amount of time you or your drivers spend waiting for a ferry at the dock? [ACCEPT UP TO 3 RESPONSES]

1. Nothing - We just go when customer request us
2. Get to the dock on time/be there half hour before sailing/get in line early
3. Know ferry schedule / route trucks according to ferry schedule
4. Get over and back as early as possible/ catch earliest ferry we can
5. Driver discretion/Leave it up to driver/when we get there
6. Make a Reservation/appointment
7. Call ahead to get priority loading pass
8. Use cameras/website to see what the wait is / Use ferry app to see how far traffic is backed up
9. Some other strategy [Specify _____]
10. Do not have a strategy
11. Don't Know

Survey Questionnaire (Cont'd)



RESERVATIONS

26. Are you aware Washington State Ferries offers a vehicle reservation system?
1. Yes, aware
 2. No, not aware → **SKIP TO Q29**

[IF Q9 ROUTE EQUALS 8, 9 OR 10 ASK Q27-Q28 OTHERWISE SKIP TO Q29]

27. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville [COOP-vil] /Port Townsend and Anacortes [ann-a-COR-tiss] 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 reservation system? Would you say ... **[READ LIST]**
1. Always,
 2. Often,
 3. Sometimes,
 4. Rarely, or
 5. Never? → **SKIP TO Q29**
 6. (DNR: Don't Know)
28. All things considered, how satisfied are you with the reservation system that WSF offers? Would you say ... **[READ LIST]**
1. Very satisfied,
 2. Satisfied,
 3. Neither satisfied nor dissatisfied,
 4. Dissatisfied, or
 5. Very Dissatisfied?
 6. Have never used WSF vehicle reservation system

Survey Questionnaire (Cont'd)



[IF Q9 ROUTE EQUALS 1-7 OR 11 ASK Q29 OTHERWISE SKIP TO Q30INT]

29. If all of the Central Puget Sound ferry routes had a reservations system for all vehicles, including commercial vehicles and trucks that require a reservation to be secured at least two hours prior to sailing and that you must check in at the tollbooth at least 30 minutes prior to your sailing to receive your guaranteed space, would your company's usage of the Central Puget Sound ferries increase, decrease, or remain the same as a result of having a reservation system in place? [IF ASKED: Central Puget Sound routes are all the routes from Mukilteo [muck-il-TEE-o]/Clinton in the north to Point Defiance/Tahlequah [TAL-i-kwah] in the south]
1. Increase
 2. Same
 3. Decrease
 4. Don't know
 5. Don't want reservations on Central Puget Sound routes → SKIP TO Q34INT
 6. Already use the reservation system on all the routes we use
 7. Don't do shipping in the Central Puget Sound region

30.INTRO The current WSF reservation system has the following features ... [READ LIST]:

- Space is available for reservations up to two months ahead of the season schedule start date
- No reservation deposit is necessary at the time the reservation is made.
- You must check in at the tollbooth at least 30 minutes prior to your sailing to receive your guaranteed space
- A reservation no-show fee equal to 25% to 100% of the applicable fare is charged if you miss your reserved sailing and don't travel from the same terminal on the same day.
- Reservations may be cancelled and or changed once up to 5 pm of the prior day with no penalty.
- If a truck is not on time for boarding, space is released for general boarding and the company forfeits their reserved space but are not charged a no-show fee if they travel the same day; and
- The online reservation system will provide a 24-hour reminder on upcoming reservations along with travel tips to make your reservation experiences go smoothly.

30. How likely would your company be to use this reservation system knowing you would pay 100 percent of the fare if your truck wasn't there on time for boarding? Would you say...? [READ LIST]
1. Definitely would use → SKIP TO Q33
 2. Would be very likely to use → SKIP TO Q33
 3. Would be somewhat likely to use
 4. Would be somewhat unlikely to use
 5. Would be very unlikely to use
 6. Definitely would not use
 7. (DNR: Don't know)

Survey Questionnaire (Cont'd)



31. How likely would your company be to use the reservation system if the reservation knowing you would pay 50% of the fare if your truck wasn't there on time for boarding? [REPEAT SCALE IF NEEDED]
1. Definitely would; → SKIP TO Q33
 2. Would be very likely to → SKIP TO Q33
 3. Would be somewhat likely to
 4. Would be somewhat unlikely to
 5. Would be very unlikely to
 6. Definitely would not
 7. (DNR: Don't know)
32. How likely would your company be to use the reservation system if the reservation knowing you would pay 25% of the fare if your truck wasn't there on time for boarding? [REPEAT SCALE IF NEEDED]
1. Definitely would
 2. Would be very likely to
 3. Would be somewhat likely to
 4. Would be somewhat unlikely to
 5. Would be very unlikely to
 6. Definitely would not
 7. (DNR: Don't know)
33. How much of a difference would it make if WSF charged 20% more for reservations but only required that you show up 10 minutes instead of 30 minutes prior to your sailing to receive your guaranteed space? Would you say that showing up 10 minutes instead of 30 minutes prior to your reservation would make a ... [READ LIST]
1. Big Difference – You would use the reservation system a lot, or
 2. A Small Difference – You might use it more, or
 3. No Difference?

CONGESTION PRICING

[IF Q15" a" > 0 - PEAK_HOUR_TRIPS=TRUE, ASK Q34.INTRO AND Q35, ELSE SKIP TO Q36]

34.INTRO The next set of questions are about shipping freight on the ferries during peak travel. [IF ASKED: Peak Travel Periods are defined as ...]:

**MONDAY thru FRIDAY - EASTBOUND between 5:30 am and 10:00 am, or
MONDAY thru FRIDAY - WESTBOUND between 3:00 pm and 7:00 pm, or
SATURDAY - WESTBOUND between 12:00 and 6:00 pm, or
SUNDAY - EASTBOUND between 11:00 am and 5:00 pm.**

Survey Questionnaire (Cont'd)



34. If freight customers who use the ferry during peak travel periods were charged one and a half times the fare currently charged for freight vehicles, what percent of your freight trips, if any, would you move to off-peak times?
_____ % **[IF 100% SKIP to Q37]**
a. Don't know → **READ:** An estimate is fine.
35. If freight customers who use the ferry during peak travel periods were charged three times the fare currently charged for freight vehicles, what percent of your freight trips, if any, would you move to off-peak times?
_____ %
a. Don't know → **READ:** An estimate is fine.
36. Changing to overnight trips. If freight customers on overnight sailings between 9pm and 5am each day were charged just half of the fare currently charged for freight trip, what percent of your freight trips, if any, would you schedule for the 9pm and 5am time period?
_____ %
a. Don't know → **READ:** An estimate is fine.
37. Would a free secure parking area on the west Puget Sound arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?
1. Yes
2. No
3 (DNR: Don't know)
38. Do you pay your drivers by the mile, by the hour or a mix of the two?
1. By the mile only
2. By the hour only
3. Both by the mile and the hour
4. (DNR: Don't know)
39. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries ... **[READ LIST]**
1. Increased significantly,
2. Increased somewhat,
3. Not changed,
4. Decreased somewhat, or
5. Decreased significantly?
6. (DNR: Don't know)

Survey Questionnaire (Cont'd)



40. 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...? **[READ LIST]**
1. A very good value,
 2. A good value,
 3. A poor value, or
 4. A very poor value?
 5. (DNR: Don't know)
41. Other than lowering the price, what else could Washington State Ferries do to help you move freight on the ferries? **[INTERVIEWER - PROBE WITH "How else could ferries serve freight customers better?"]**
-

VERIFY PHONE NUMBER
VERIFY RESPONDENTS NAME

Thank Respondent for completing the full survey and hang up. Record their company information from sample sheet on survey.

Survey Questionnaire (Cont'd)



TERMINATION QUESTION – ASKED ONLY OF THOSE THAT DO NOT SHIP ON WSF

96. What is the zip code where the majority of your trucks are stored overnight?

_____ Zip Code

(DNR: Don't know)

97. Do you ever ship to areas on the west side of Puget **[PEW-jit]** Sound where you possibly could use the ferry system to transport your freight?

1. Yes

2. No

98. What do you feel are the primary problems or issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better? **[INTERVIEWER - PROBE WITH "How else could ferries serve freight customers better?"]**

Thank Respondent for completing the 'Reasons for not using the ferry' survey questions and hang up. Record their company information from sample sheet on survey.