The following report presents the findings to the freight research. The main objective of this research is to understand from the freight schedulers’ prospective their opinions, attitudes and motivators for using the WSFs to move their freight shipments.

- This overall objective resulted in the following areas of exploration:
  - Profiling freight customers - number of trucks, line of business, customer delivering to, etc.
  - Freight activity - which routes and when is freight transported, what flexibility do freight customers have when choosing crossings?
  - Wait time - is wait time an issue and if so, how prevalent and to what degree?
  - Reservations - what is the utilization of the commercial reservation system currently in place and what would be the interest in expanding the coverage under different payment options?
  - Congestion pricing - how likely would freight customers be to change their travel patterns if there was a peak surcharge or a late night off-peak discount?

- A total of 101 telephone interviews were conducted with a random sample of WSF freight customers between 04/27/2010 and 05/04/2010.
  - A sample of 101 yields a maximum sampling variability of +/- 9.8% at the 95% confidence level.
  - The interviews were conducted by Market Decisions Corporation between 7 a.m. and 5 p.m. PDT.

- 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.
**Fleet Profile**

**Size of Truck Fleet**

- 11 or more trucks: 35%
- 1-5 trucks: 40%
- 6-10 trucks: 25%

*Mean = 34; Median = 7*

58% of trucks use WSF

**Industries Represented (n=101)**

- Construction: 19%
- Timber or wood products: 11%
- Retail trade: 11%
- City delivery trucking: 9%
- Truck load trucking: 8%
- Agribusiness or fishing: 6%
- Wholesale trade: 6%

**Locations Delivered To (n=101)**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Most</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail or commercial businesses</td>
<td>72%</td>
<td>41%</td>
</tr>
<tr>
<td>Construction sites</td>
<td>50%</td>
<td>26%</td>
</tr>
<tr>
<td>Residential locations</td>
<td>42%</td>
<td>19%</td>
</tr>
<tr>
<td>Warehouses</td>
<td>35%</td>
<td>8%</td>
</tr>
<tr>
<td>Other type of location</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Questions**

- **S2** Approximately how many trucks are in your fleet in total?
- **S2a** How many of those trucks use the Washington State Ferries?
- **Q3** Which of the following categories best describes your company’s line of business?
- **Q4a** Using the ferries, do you deliver freight to ...?
- **Q4b** Which do you deliver the most freight to using the ferries?
S3 How frequently do you use the Washington State Ferries to transport goods and services by truck?

S4 Is the average number of crossings made by your trucks that use the Washington State Ferries different in October through March than it is in April through September?

S4A/S5A/S5B Approximately how many one-way crossings are made by your trucks that use the Washington State Ferries in a typical month/from October through March/from April through September?
Q1 What ferry routes do you use for moving freight?
Q2 Which ferry route do you use most often?
### Average Trips taken by Time Slice

<table>
<thead>
<tr>
<th>Time slice</th>
<th>Peak</th>
<th>Midday</th>
<th>Night</th>
</tr>
</thead>
<tbody>
<tr>
<td>System wide</td>
<td>8.2</td>
<td>9.0</td>
<td>1.4</td>
</tr>
<tr>
<td>Seattle / Bainbridge</td>
<td>17.4</td>
<td>11.3</td>
<td>1.0</td>
</tr>
<tr>
<td>Seattle / Bremerton</td>
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<td>2.4</td>
<td>0.0</td>
</tr>
<tr>
<td>Edmonds / Kingston</td>
<td>10.7</td>
<td>23.7</td>
<td>0.4</td>
</tr>
<tr>
<td>Mukilteo / Clinton</td>
<td>6.8</td>
<td>4.3</td>
<td>1.8</td>
</tr>
<tr>
<td>Fauntleroy / Vashon</td>
<td>3.5</td>
<td>3.5</td>
<td>0.0</td>
</tr>
<tr>
<td>Fauntleroy / Southworth</td>
<td>1.7</td>
<td>1.7</td>
<td>0.0</td>
</tr>
<tr>
<td>Point Defiance / Tahlequah</td>
<td>1.0</td>
<td>1.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Keystone / Port Townsend</td>
<td>3.0</td>
<td>1.2</td>
<td>1.3</td>
</tr>
<tr>
<td>Anacortes / San Juans</td>
<td>9.2</td>
<td>1.9</td>
<td>3.4</td>
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<tr>
<td>Interisland San Juans</td>
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<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Vashon / Southworth</td>
<td>0.8</td>
<td>14.3</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Q5** In a typical month, how many of your freight trips on (ROUTE) are taken during each of the following travel periods?

**Q6A/B** In a typical month from October through March/ April through September, how many of your freight trips on (ROUTES) are taken during each of the following travel periods?
Q33 Since you/your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries...  
Q34 What is the primary reason for the decrease?  
Q35 What other reasons are there?
Travel Flexibility

(n=101)

- Completely flexible: 8%
- Somewhat flexible: 31%
- Somewhat inflexible: 20%
- Completely inflexible: 28%
- Don’t know: 2%

Factors Influencing Sailing Decision

(n=101)

- Closest/convenient route: 30%
- Meet customer needs/demands: 18%
- Time of sailing: 13%
- Delivery schedule: 12%
- When customer is open to receive shipment: 9%
- Availability: 5%
- Traffic congestion: 4%
- Other: 29%

Q8: What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your trips?
Q9: 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?
Q10: What factors affect your flexibility in terms of time of day and/or day of the week you schedule freight truck trips on the ferries?
Q7: What factors influence your decision as to which specific ferry sailing to take?
Q11 One problem that commercial vehicle drivers have reported during peak vehicle commute travel periods is how long they have to wait before they can drive on the ferry. How big of an issue or problem would you say the wait time is for you or your drivers?

Q13 What strategies do you use to minimize the amount of time you or your drivers spend waiting for a ferry at the dock?
Q17-20 If a commercial vehicle reservation system had the following features:

- Some space would be available for reservations up to a month ahead of the travel date and some would be held back for reservations made one day ahead of travel;
- There would be a deposit made at the time a reservation was made that could range from 25% to 100% of the fare. Refunds could be made under certain circumstances or if a reservation is changed within a specified time period ahead of the sailing.
- If a truck was not on time for boarding, space would be released for general boarding and the company would forfeit their reserved space and reservation deposit; and
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open on a first come, first-served basis.

...how likely would your company be to use this commercial vehicle reservation system if the reservation deposit were 100%/75%/50%/25% of the fare for that trip? Would you say you...
Q24 Using a 5-point scale where 1 means “strongly disagree” and 5 means “strongly agree,” to what extent do you agree or disagree that to reduce peak travel period congestion, freight customers should be charged a premium over the regular freight fares but receive a discount from the regular freight fares if they are traveling during off-peak periods.

Q25-27 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 trucks, what percent of your truck trips would you move to off-peak times?
Q36 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?

Q37 Other than lowering the price, what else could Washington State Ferries do to help you move freight more efficiently on the ferries?

Q32 What do you feel are the primary problems/issues facing the Ferry system with regards to its ability to transport freight and serve their freight customers like yourself better?
Questions?