



market decisions
CORPORATION

Freight Survey

Presentation

*Part of the Washington State Transportation
Commission 2010 Ferry Research Initiative*



**Washington State
Transportation Commission**

Conducted by
Market Decisions Corporation
April-May 2010



Methodology

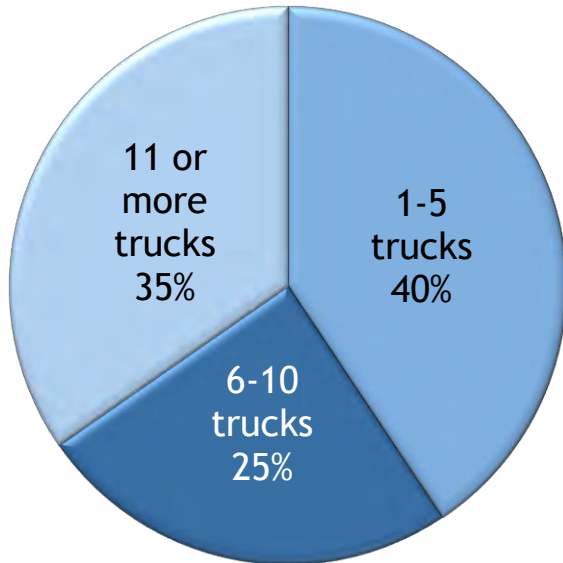
- ❖ The following report presents the findings to the freight research. The main objective of this research is to understand from the freight schedulers' perspective their opinions, attitudes and motivators for using the WSFs to move their freight shipments.
 - This overall objective resulted in the 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

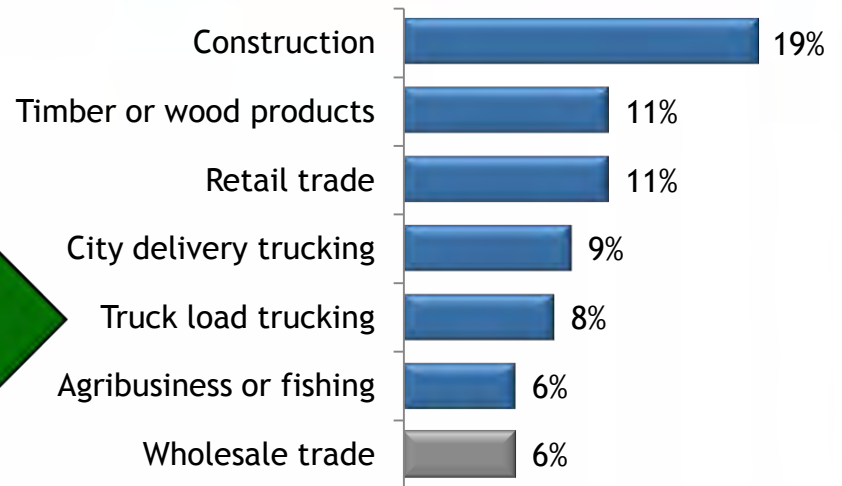
(n=101)



Mean = 34; Median = 7



Industries Represented (n=101)



Locations Delivered To

(n=101)	Total	Most
Retail or commercial businesses	72%	41%
Construction sites	50%	26%
Residential locations	42%	19%
Warehouses	35%	8%
Other type of location	9%	7%

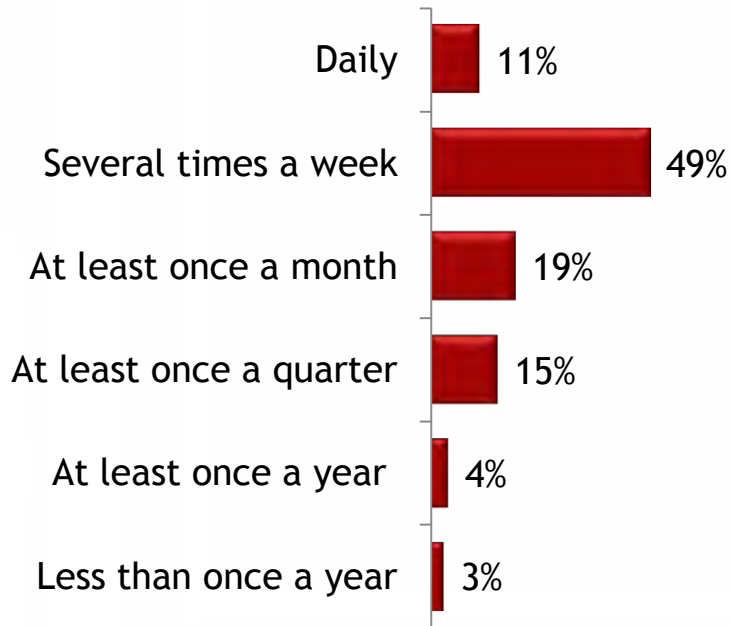
- S2 Approximately how many trucks are in your fleet in total?
- S2a How many of those trucks use the Washington State Ferries?
- Q3 Which of the following categories best describes your company's line of business?
- Q4a Using the ferries, do you deliver freight to ...?
- Q4b Which do you deliver the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



Ferry Usage

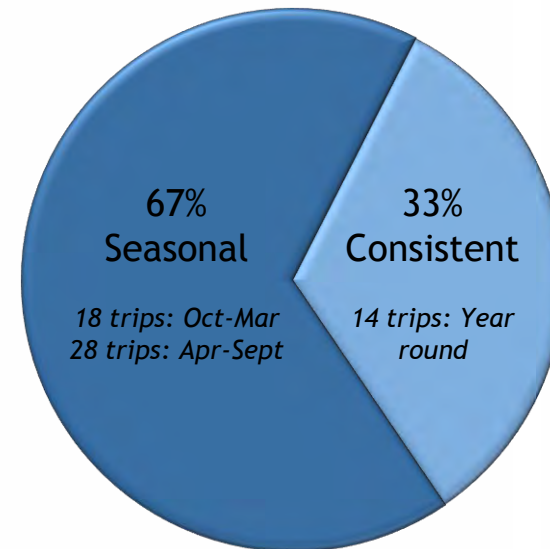
Frequency of Ferry Trips

(n=101)



Ferry Travel Behavior

(n=101)



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?

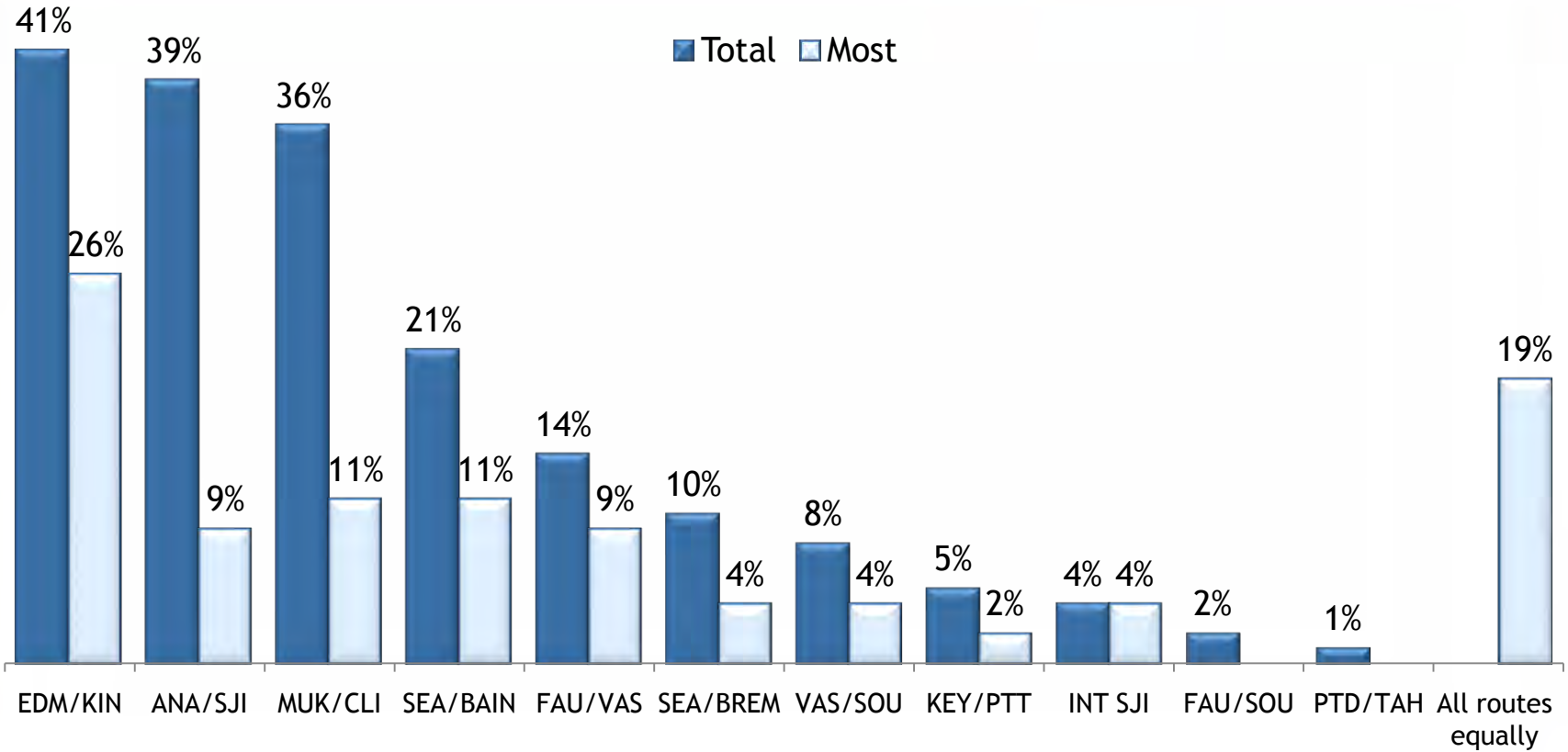


Routes Travelled

Routes Travelled

(n=101)

■ Total ■ Most



- Q1 What ferry routes do you use for moving freight?
- Q2 Which ferry route do you use most often?



Travel Behavior - Overall

Average Trips taken by Time Slice

	<i>Peak</i>	<i>Midday</i>	<i>Night</i>
System wide	8.2	9.0	1.4
Seattle / Bainbridge	17.4	11.3	1.0
Seattle / Bremerton	2.4	2.4	0.0
Edmonds / Kingston	10.7	23.7	0.4
Mukilteo / Clinton	6.8	4.3	1.8
Fauntleroy / Vashon	3.5	3.5	0.0
Fauntleroy / Southworth	1.7	1.7	0.0
Point Defiance / Tahlequah	1.0	1.0	0.0
Keystone / Port Townsend	3.0	1.2	1.3
Anacortes / San Juans	9.2	1.9	3.4
Interisland San Juans	0.5	0.0	0.0
Vashon / Southworth	0.8	14.3	0.0

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

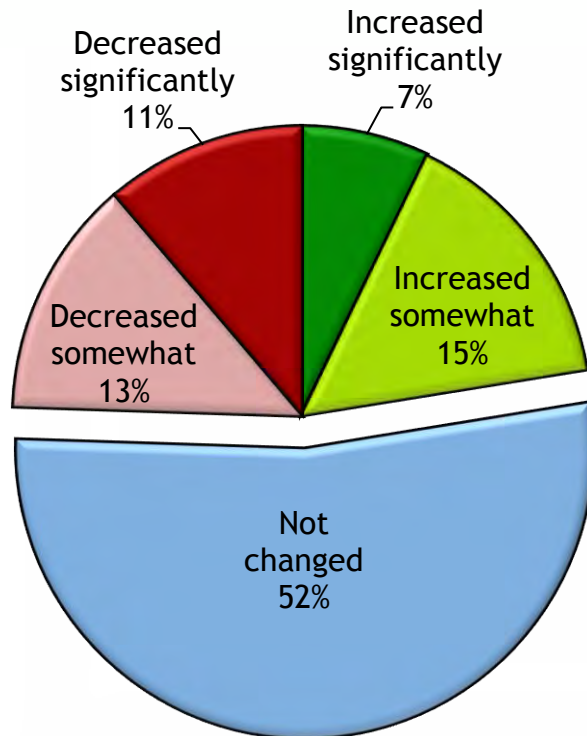
Q6A/B In a typical month from October through March/ April through September, how many of your freight trips on (ROUTES) are taken during each of the following travel periods?



Travel Behavior

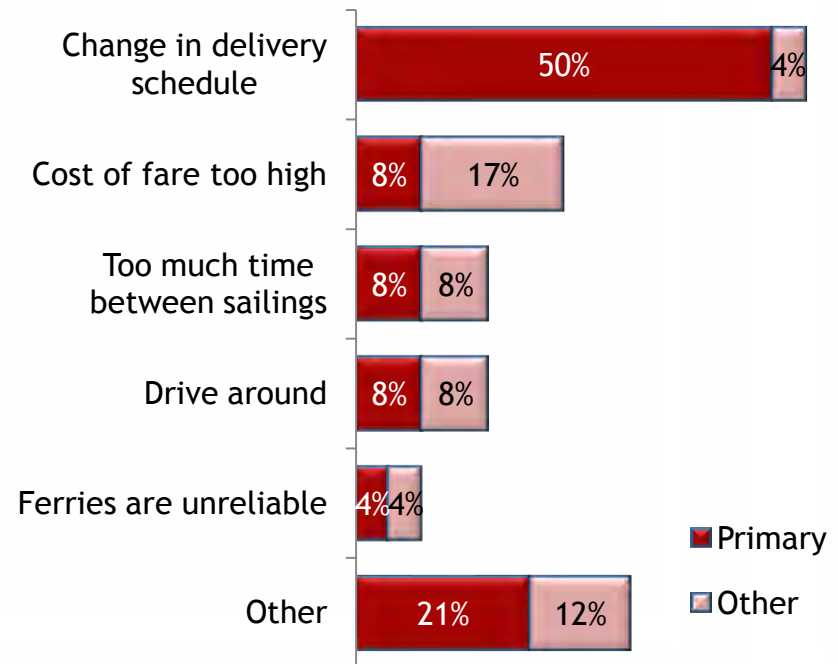
Changes in Travel Behavior

(n=101)



Reason for Decreased Travel

(n=101)



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?

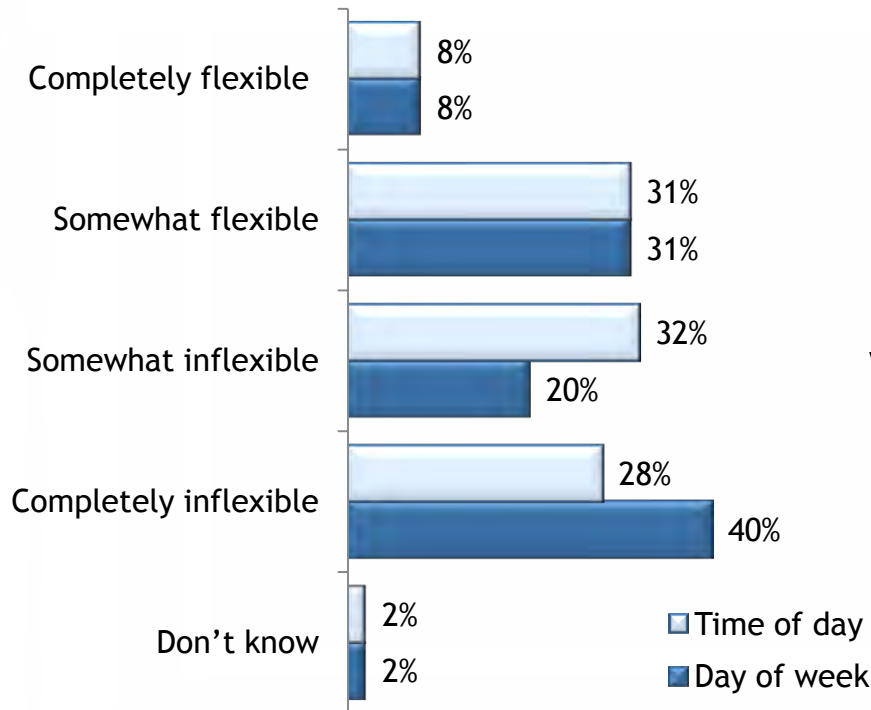
Q35 What other reasons are there?



Travel Behavior

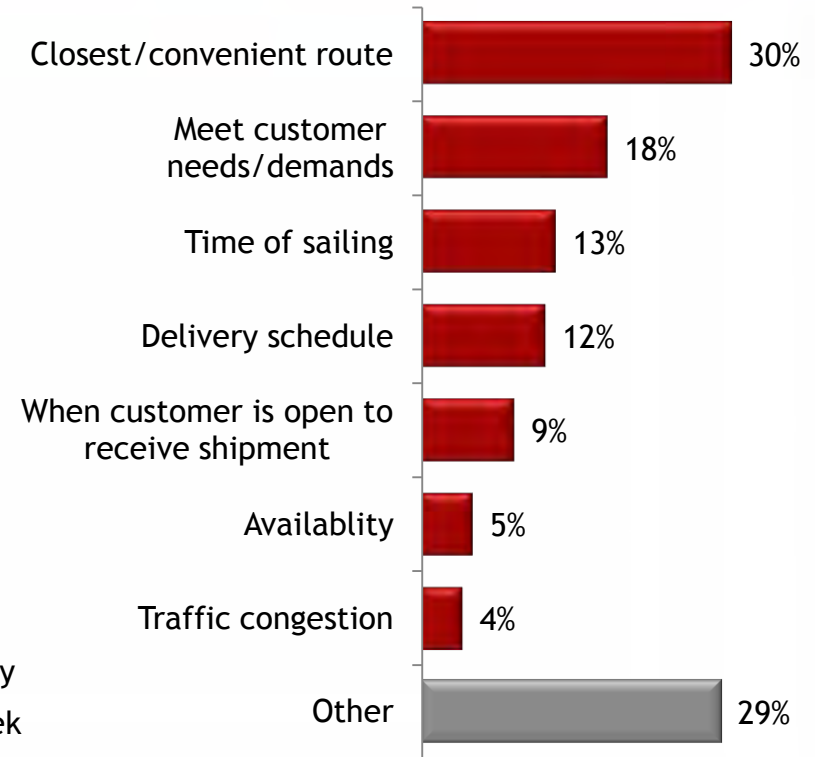
Travel Flexibility

(n=101)



Factors Influencing Sailing Decision

(n=101)

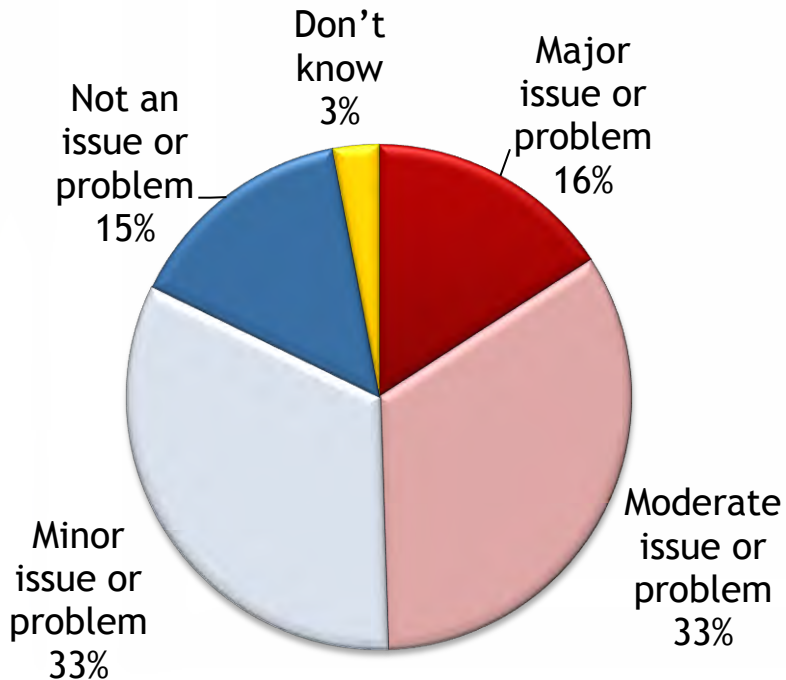


- Q8 What degree of flexibility do you have when selecting travel on the ferry in terms of the time of day you schedule your trips?
- Q9 What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers?
- Q10 What factors affect your 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?

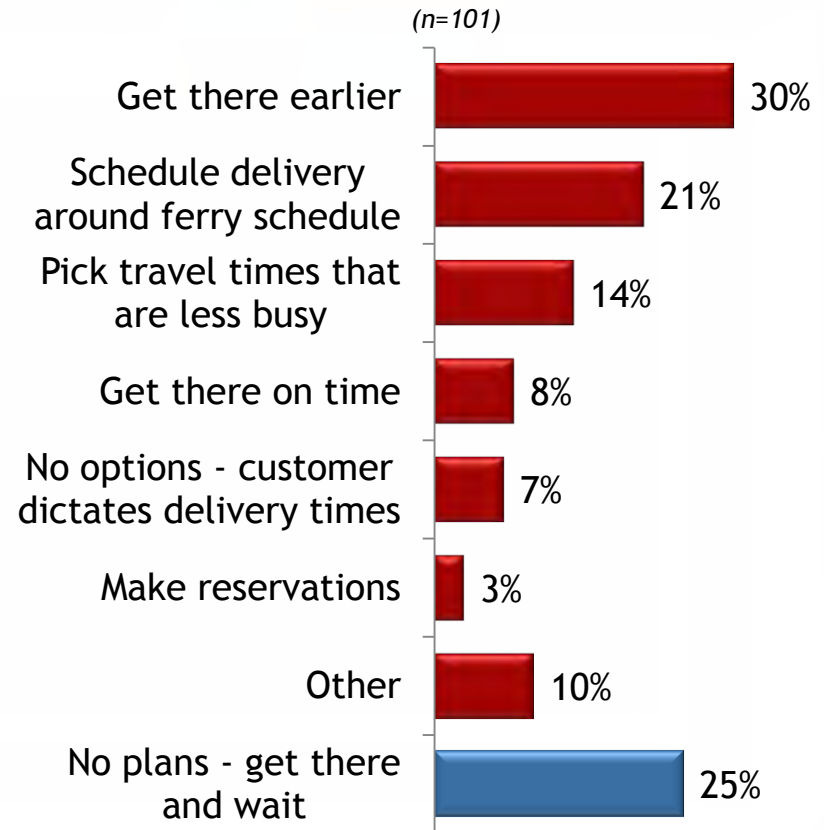


Wait Times

Impact of Wait Time During Peak Hours (n=101)



Strategies to Reduce Wait Time (n=101)

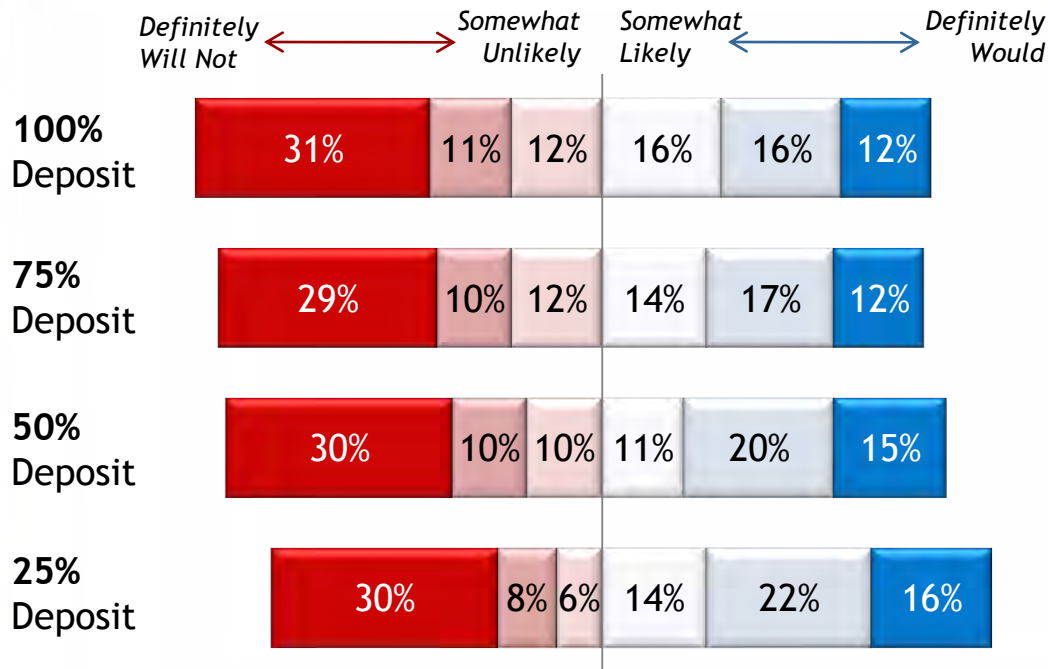


- Q11 One problem that commercial vehicle drivers have reported during peak vehicle commute travel periods is how long they have to wait before they can drive on the ferry. How big of an issue or problem would you say the wait time is for you or your drivers?
- Q13 What strategies do you use to minimize the amount of time you or your drivers spend waiting for a ferry at the dock?



Reservations

Q17-20 If a commercial vehicle reservation system had the following features):



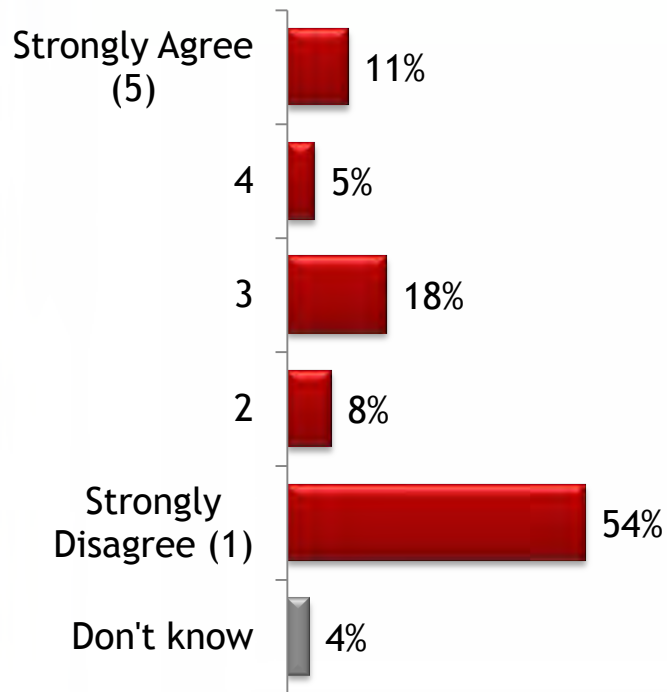
- Some space would be available for reservations up to a month ahead of the travel date and some would be held back for reservations made one day ahead of travel;
- There would be a deposit made at the time a reservation was made that could range from 25% to 100% of the fare. Refunds could be made under 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...

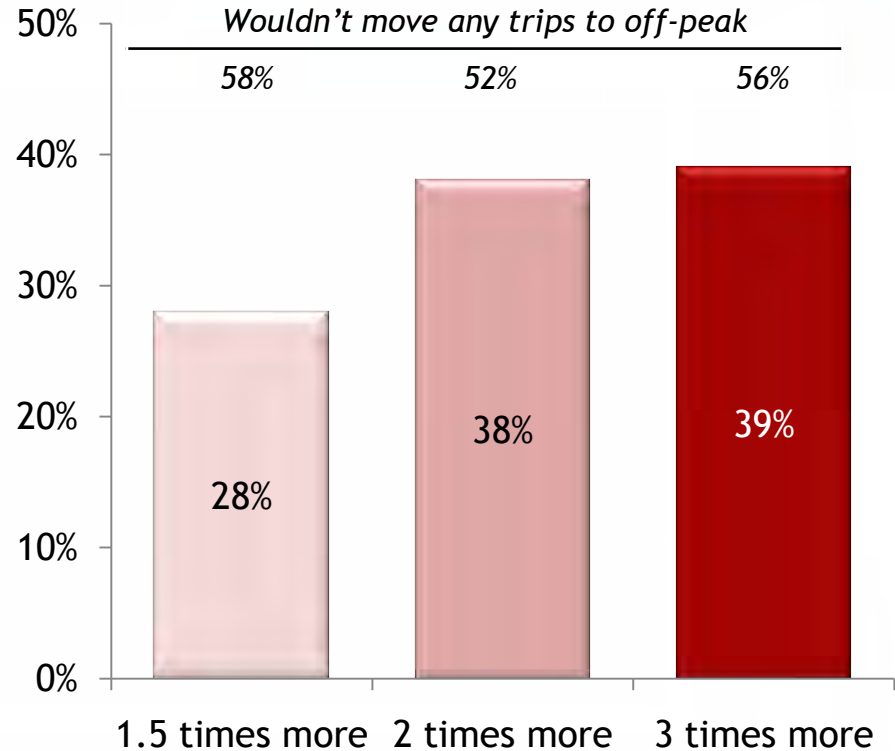


Congestion Pricing

Charging Freight Customers Premium During Peak Hours



Impact of Peak Fare Increase



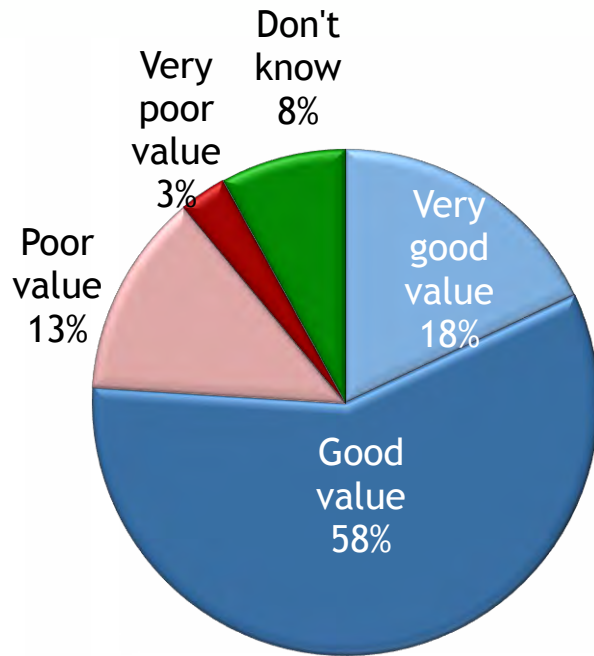
Q24 Using a 5-point scale where 1 means "strongly disagree" and 5 means "strongly agree," to what extent do you agree or disagree that to reduce peak travel period congestion, freight customers should be charged a premium over the regular freight fares but receive a discount from the regular freight 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?



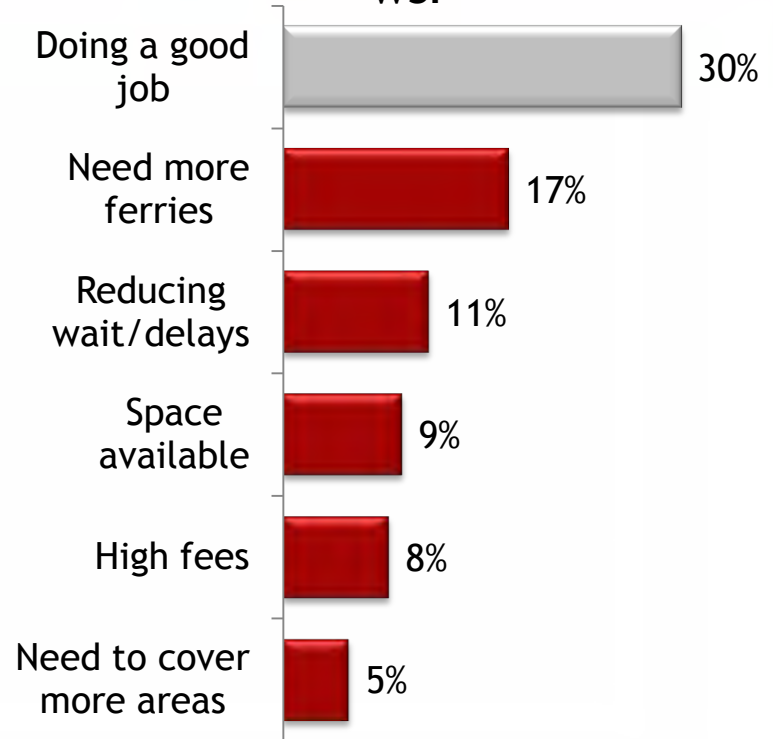
Value Perceptions

(n=101)



Primary Problems/Issues Facing

WSF



- 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?