



Washington State Transportation Commission
WSF Freight Shippers Study – FROG Survey
May 2014
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) and the Voice of Washington State (VOWS). 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). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.

The FROG research initiative in 2014 consists of the following main phases:

- Winter Customer Survey Study (target audience: commuter riders) via FROG
- Winter Policy Study (target audience: commuter riders) via FROG
- **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
- Summer On-board Recreational Survey (target audience: Out of state riders)
- Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)

The focus of this report is the Freight Survey

EMC Project/Document #: 14-5089

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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%.

Executive Summary



Fleet Profile

- Freight customers represent a wide variety of industries; Wholesale/Retail is the most frequently mentioned industry (29%), followed by Manufacturing (14%) and Construction (12%).
- A majority (56%) of deliveries are made to retail or commercial businesses, followed by residential (40%) and construction sites (30%).
- Just over half of freight customers (52%) have 1-10 trucks in their fleet and a third (32%) have 11 or more.
- The average fleet size is 47 trucks including UPS's fleet of 3,500 trucks and 17 trucks without including the UPS fleet.
- On average, just over half (54%) of freight customers' trucks use Washington State Ferries.
- Of the trucks that use WSF, 46% are under 40 feet in length and 74% are under 60 feet.

Executive Summary



Ferry Usage

- Almost half of freight customers (47%) use WSF at least weekly. For companies whose trips vary by season (40%), they average 30 trips a month in April-September, compared to 23 trips a month in October-March. Companies whose freight trips are consistent year round average 18 trips per month.
- Freight trips are heavily skewed towards peak hours, with almost no freight trips at night. Since 2012 there has been a significant shift away from midday to peak trips.
- As in 2012, Edmonds/Kingston (20%) is the most used route, followed by Mukilteo/Clinton (14%) and Seattle/Bainbridge (14%).
- The majority of companies (68%) say frequency of ferry use has not changed, with a quarter (24%) increasing their use and 8% (n=8) decreasing their use.
- Most companies (84%) say Washington State Ferries provide a good value. Overall, the perception of WSF as a good value has increased since 2012, however, intensity has dropped.

Executive Summary



Travel Flexibility

- Half (50%) of freight customers report having some flexibility in time of day and 40% have at least some flexibility when selecting travel day. However, 22% have no flexibility when it comes to time of day and 34% have no flexibility for day of week.

Wait Times

- Three quarters (78%) of freight customers say wait times are at least a minor issue.
- The Anacortes/San Juans route has the most mentions of long wait times, with an average 2.6 boat wait, although sample sizes are extremely small.
- Overall, wait times are less of an issue now than they were in 2012.

Executive Summary



Reservations

- Most companies (90%) have business account with WSF. However, more than a quarter are not aware of WSF's commercial vehicle reservation system.
- Of those customers who use the Coupeville/Port Townsend or Anacortes routes, the majority use the commercial reservation system always (39%) or often (21%). Of those customers who use the reservation system most (92%) are satisfied.
- 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%.
- 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 – only a quarter 24% say they would.



Potential Commercial Reservation System

- Of those who were not aware of the commercial reservation system (n=28), most (82%) say they would be unlikely to use the system as described, even with a deposit as low as 25%.
- Overall, customers seem much less likely to use the commercial vehicle reservation system than they were two years ago.
- Half (53%) say not charging a no show fee would make some difference in their likelihood to use the system.
- Overall, only one-in-five (18%) say they would use WSF more often with a commercial vehicale reservation system.

Executive Summary



Congestion Pricing

- By a 44% to 29% margin, freight shippers disagree that they should be charged a premium over regular freight fares if they travel during peak periods – even when the increase is coupled with a discount for non-peak travel.
- Overall, freight shippers are less opposed to the idea of congestion pricing than in 2012 (44% vs. 62% disagree).
- About half of 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.
- 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 say they lack the flexibility to change the time.
- Most freight customers say a secure parking area on the arrival side would not make them more likely to schedule ½ priced late night ferry sailings.



Fleet Profile

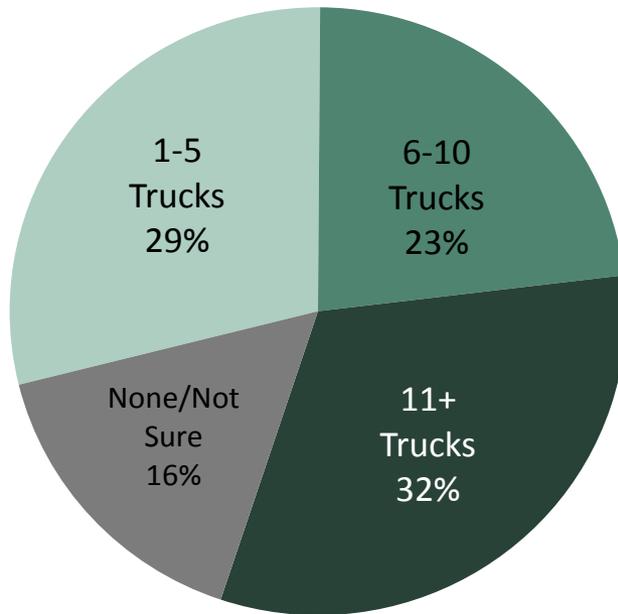
Fleet Profile



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)

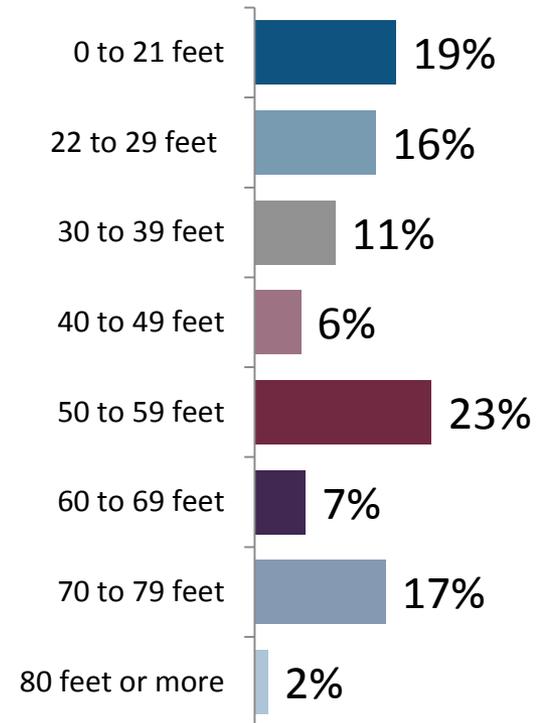


Mean: 47.1 (17.3)*
*without UPS



Size of Trucks Traveling on WSF

(n=101)



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

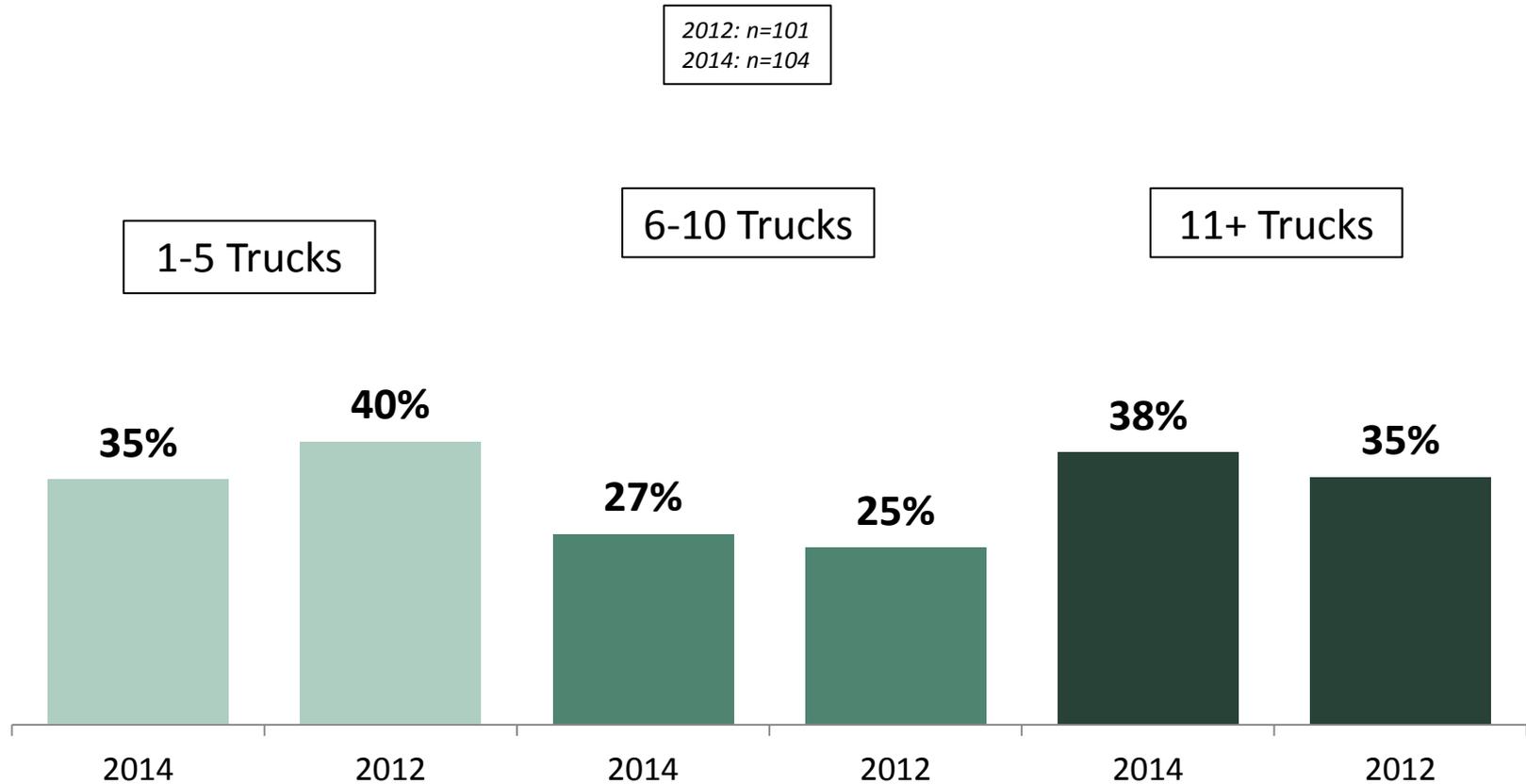
Q3. And how many of those trucks use Washington State Ferries? Again an estimate is fine.

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]

Fleet Size - Comparison



Fleet sizes for the freight companies in the 2014 survey are similar to the 2012 survey.



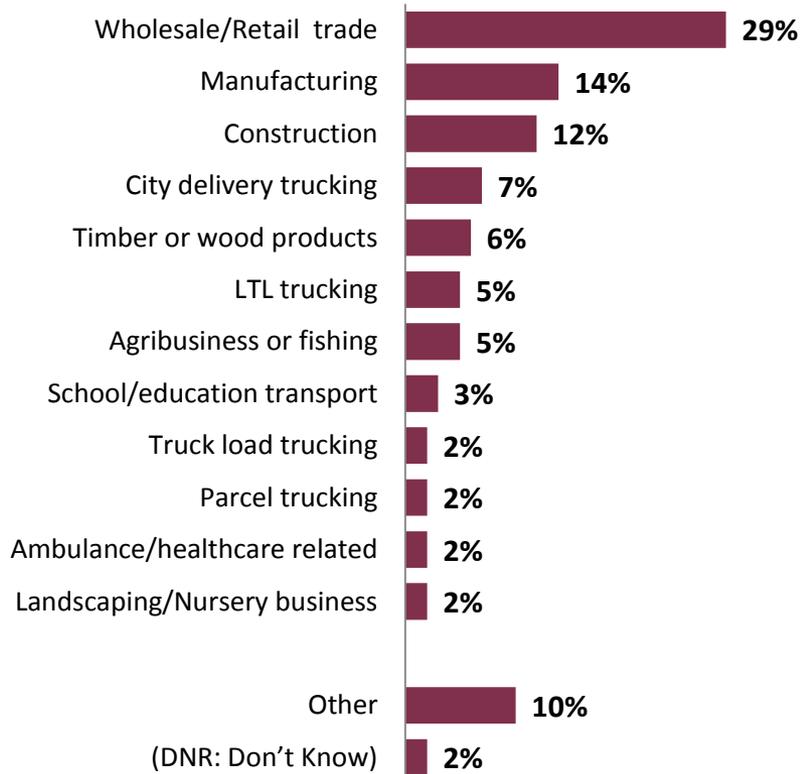
Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

Fleet Profile



More than a quarter (29%) of freight customers are in Wholesale/Retail, followed by Manufacturing (14%) and Construction (12%). A majority (56%) of deliveries are made to retail or commercial businesses, followed by residential (40%) and construction sites (30%).

Business Categories



Location Delivered to (by types)	Total (Q13)	Most Freight (Q14)
Retail or commercial businesses	56%	19%
Residential locations	40%	30%
Construction sites	30%	41%
Warehouses	8%	--
Some other type of place or location	6%	4%
School/educational locations	3%	--
(DNR: Don't Know)	3%	7%

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

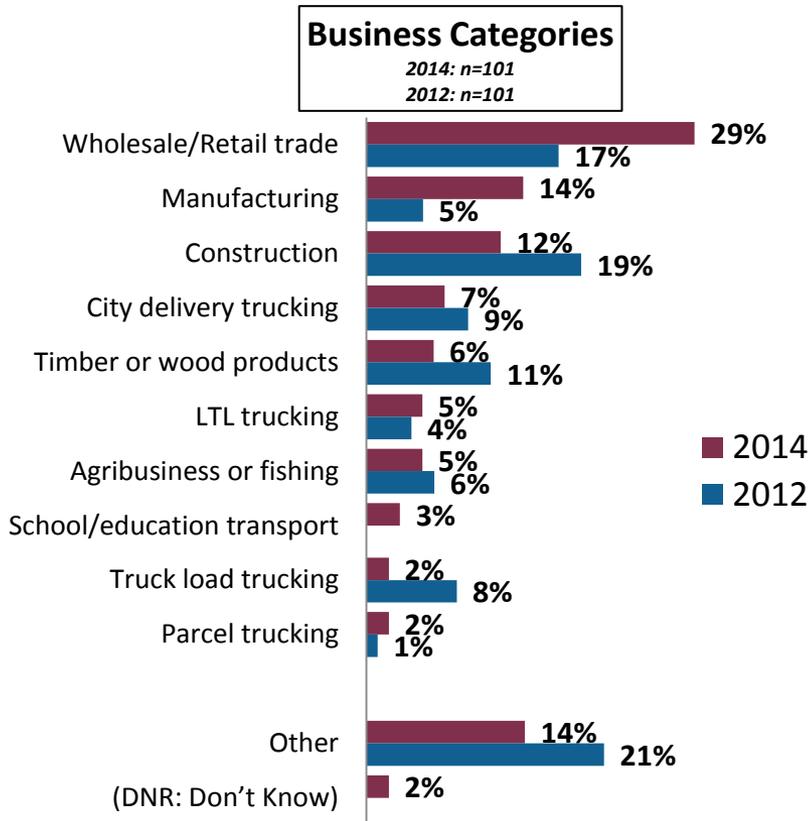
Q13. Using the ferries, which location type do you deliver freight to? [MULTI RESPONSE]

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

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?



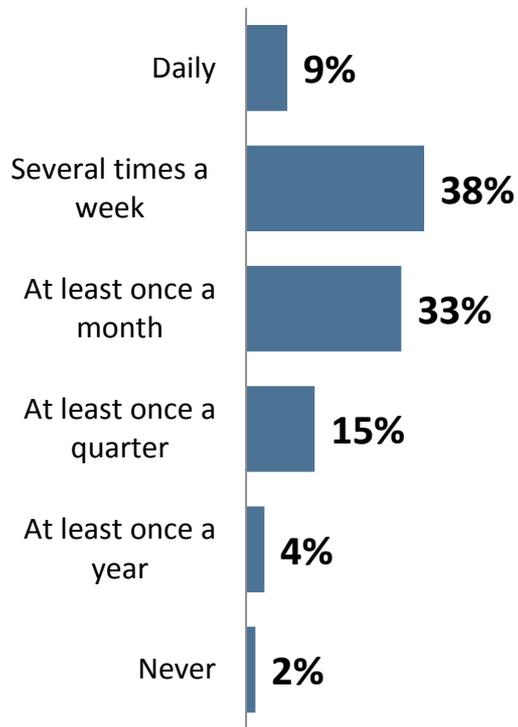
Ferry Usage

Ferry Usage

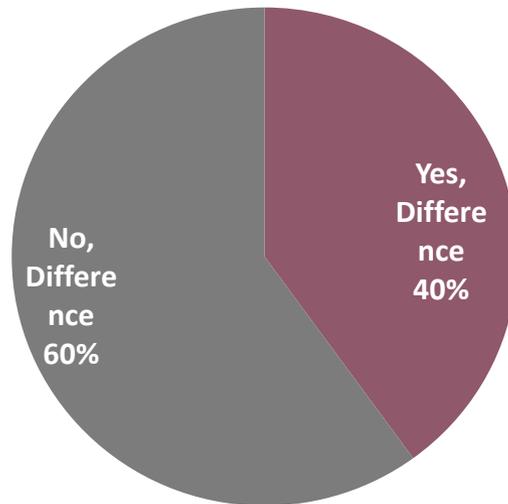


Almost half of freight customers (47%) use WSF at least weekly – this is down from 60% in 2012. For those whose trips vary by season (40%), they average 30 spring/summer trips compared to 23 fall/winter trips. Companies whose freight trips are consistent year round average 18 trips per month.

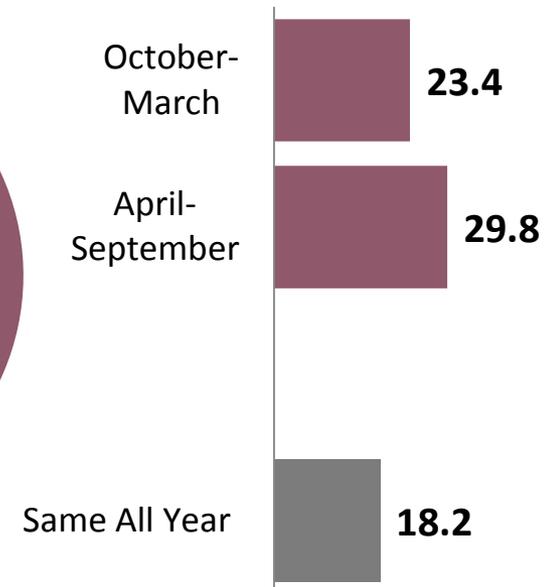
Frequency of Ferry Trips



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.

Routes Travelled



Edmonds/Kingston is the most frequently used route overall and it is also the single most used route.

<i>Route</i>	<i>Total Use (Q10)</i>	<i>Most Used (Q11)</i>
Edmonds / Kingston	36%	20%
Mukilteo / Clinton	30%	14%
Anacortes / San Juans- Shaw, Orcas, Lopez, Friday Harbor	29%	8%
Seattle / Bainbridge	23%	14%
Seattle / Bremerton	14%	12%
Fauntleroy / Vashon	14%	--
Coupeville / Port Townsend	12%	2%
Vashon / Southworth	10%	4%
Interisland San Juans - Shaw, Orcas, Lopez, and Friday Harbor	9%	--
Point Defiance / Tahlequah	6%	2%
Fauntleroy / Southworth	6%	--
Anacortes / Sidney	3%	2%
Routes used equally	--	14%
Don't know/Refused	5%	6%

Q10. What ferry routes do you use for moving freight? [MULTI RESPONSE]

[IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

Q11. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q10]

Routes Travelled - Comparison



As in 2012, Edmonds/Kingston is the most frequently used route overall and the single most used route.

Route	Total Use		Most Used	
	2014	2012	2014	2012
Edmonds / Kingston	36%	41%	20%	26%
Mukilteo / Clinton	30%	36%	14%	11%
Anacortes / San Juans- Shaw, Orcas, Lopez, Friday Harbor	29%	39%	8%	9%
Seattle / Bainbridge	23%	21%	14%	11%
Seattle / Bremerton	14%	10%	12%	4%
Fauntleroy / Vashon	14%	14%	--	9%
Coupeville / Port Townsend	12%	5%	2%	2%
Vashon / Southworth	10%	8%	4%	4%
Interisland San Juans - Shaw, Orcas, Lopez, and Friday Harbor	9%	4%	--	4%
Point Defiance / Tahlequah	6%	1%	2%	--
Fauntleroy / Southworth	6%		--	
Anacortes / Sidney	3%		2%	
Routes used equally	--		14%	
Don't know/Refused	5%		6%	

Q10. What ferry routes do you use for moving freight? [MULTI RESPONSE]

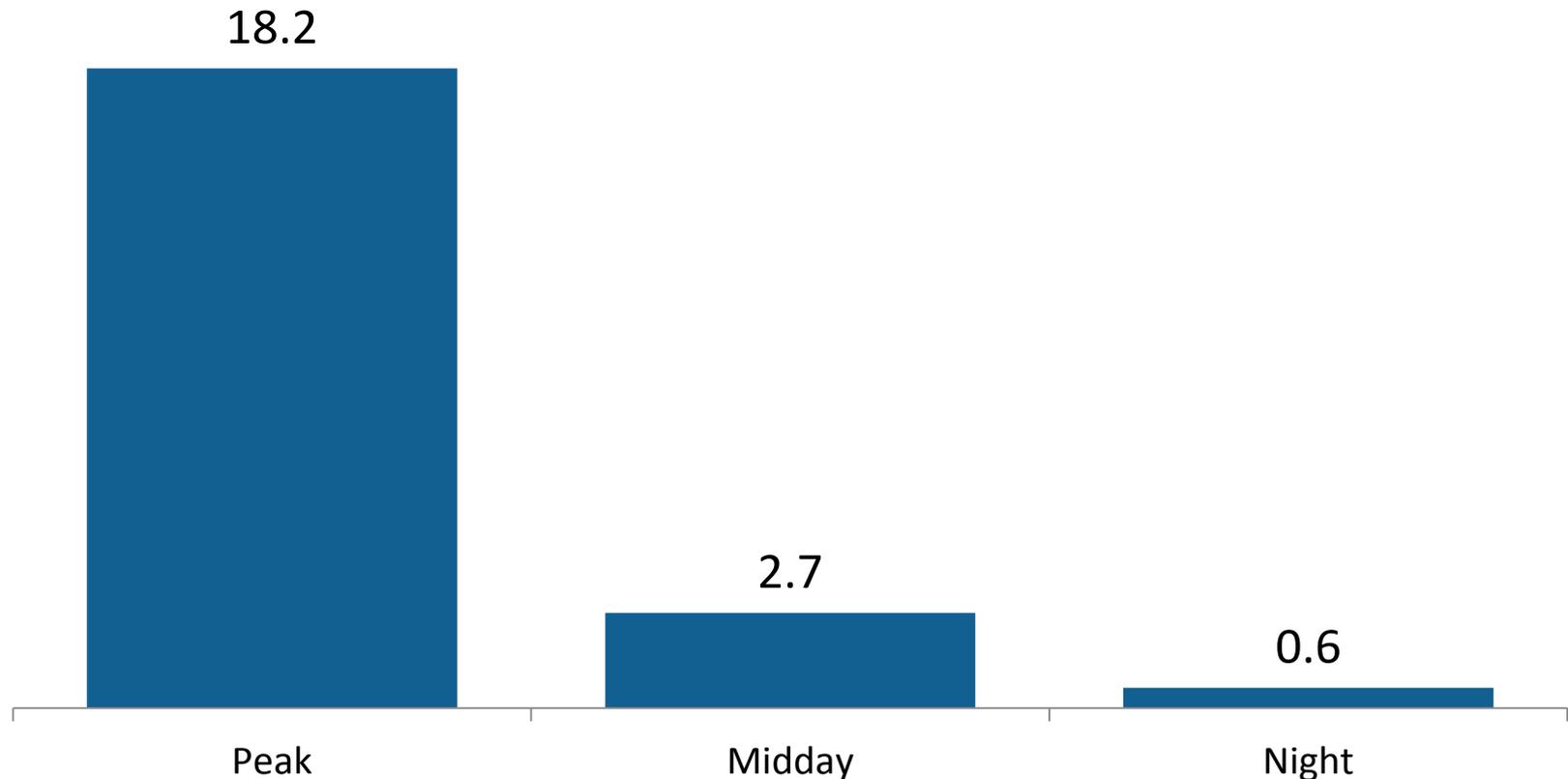
[IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

Q11. And of those routes, which ferry route do you use most often? [ASK ONLY ROUTES MENTIONED IN Q10]

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]?

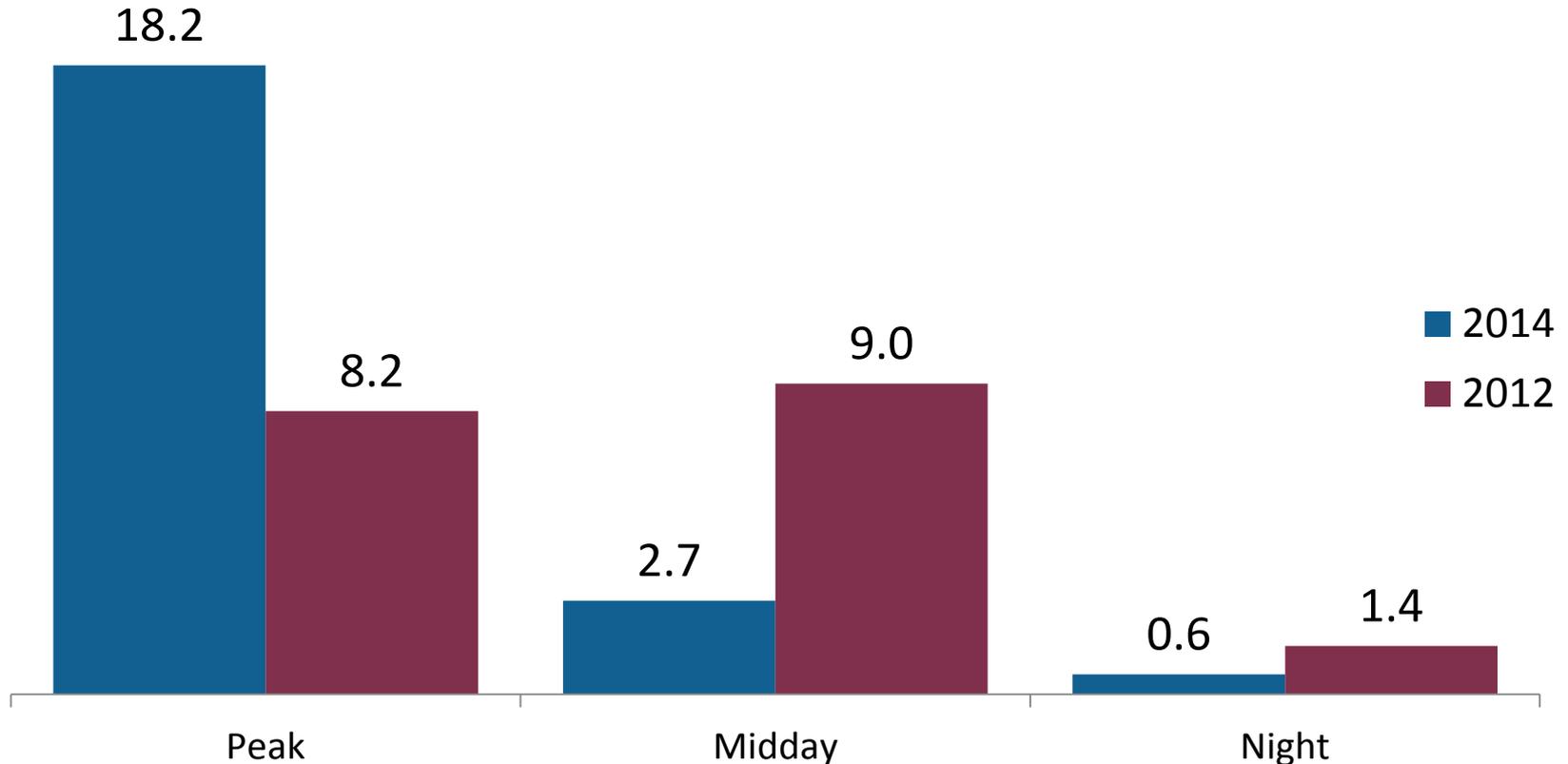
Q16. [ASK IF Q5 = 1] In a typical month from April through September, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

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]?

Travel Behavior - Comparison



Since 2012 there has been a dramatic shift away from Midday trips to Peak trips.



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]?

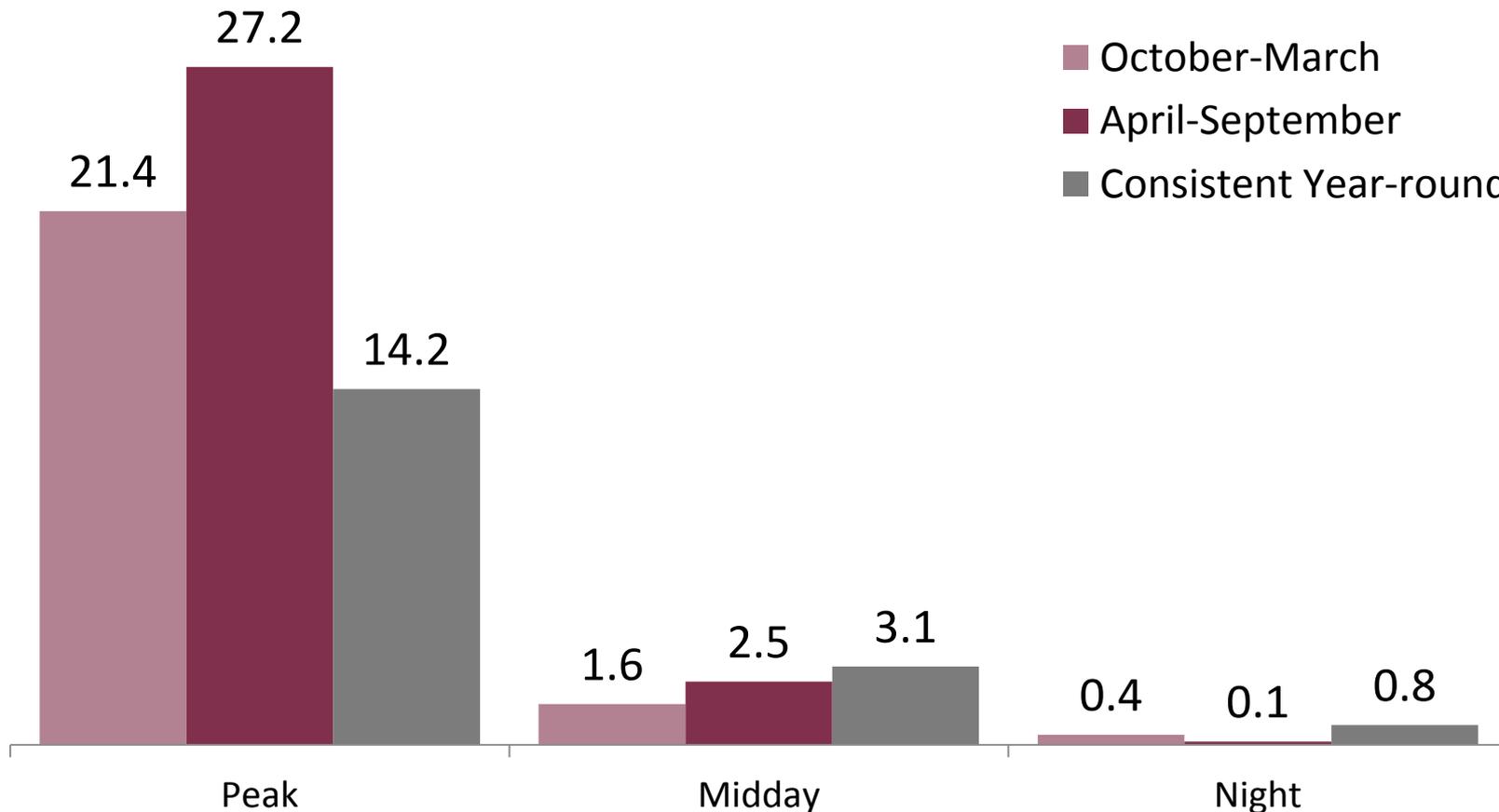
Q16. [ASK IF Q5 = 1] In a typical month from April through September, how many of your [INSERT NUMBER FROM Q7] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

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]?

Travel Behavior - Comparison



Both companies that vary their trips by season and those whose usage is consistent year round take the majority of their trips during Peak hours.



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]?

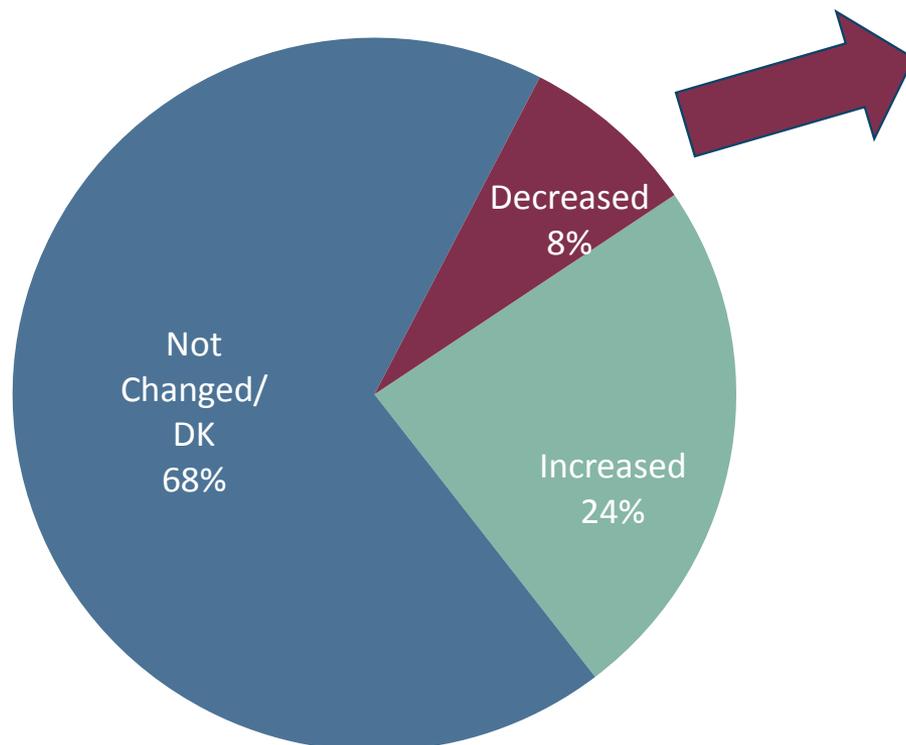
Q17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during [PEAK/MIDDAY/NIGHT]?

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)

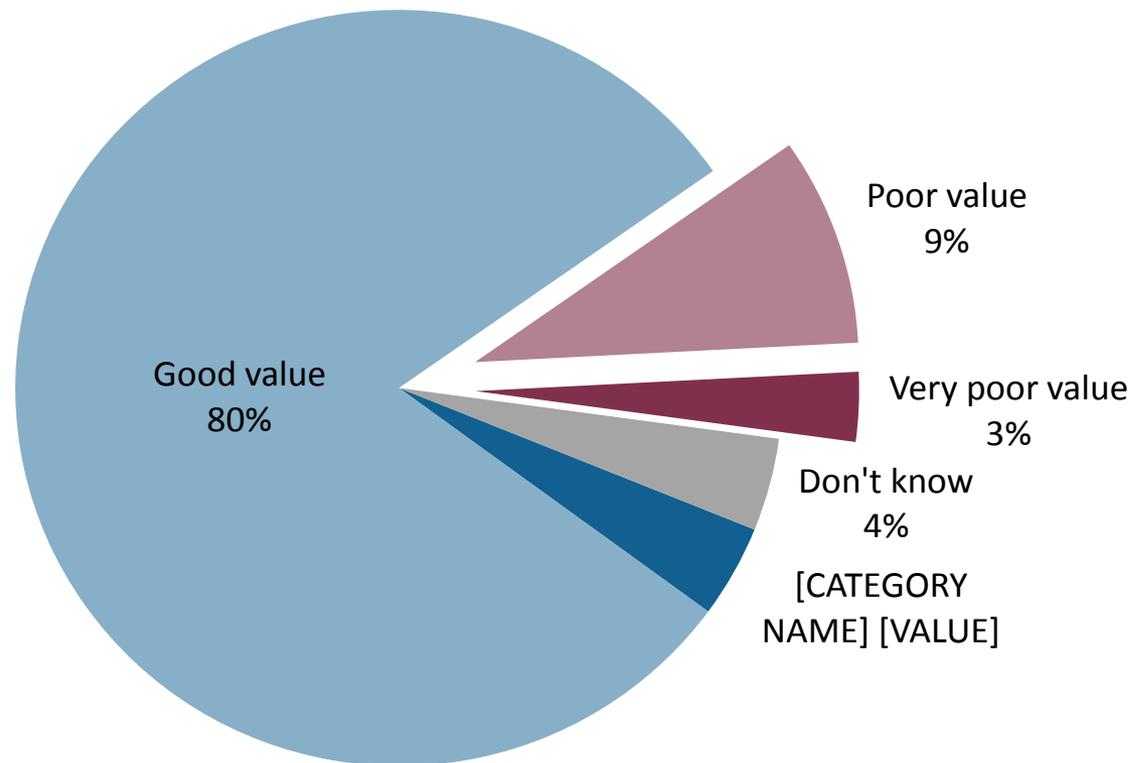
Drive around instead of using ferry (n=1)

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?



Most companies (84%) say Washington State Ferries provide a good value.

Value Perceptions



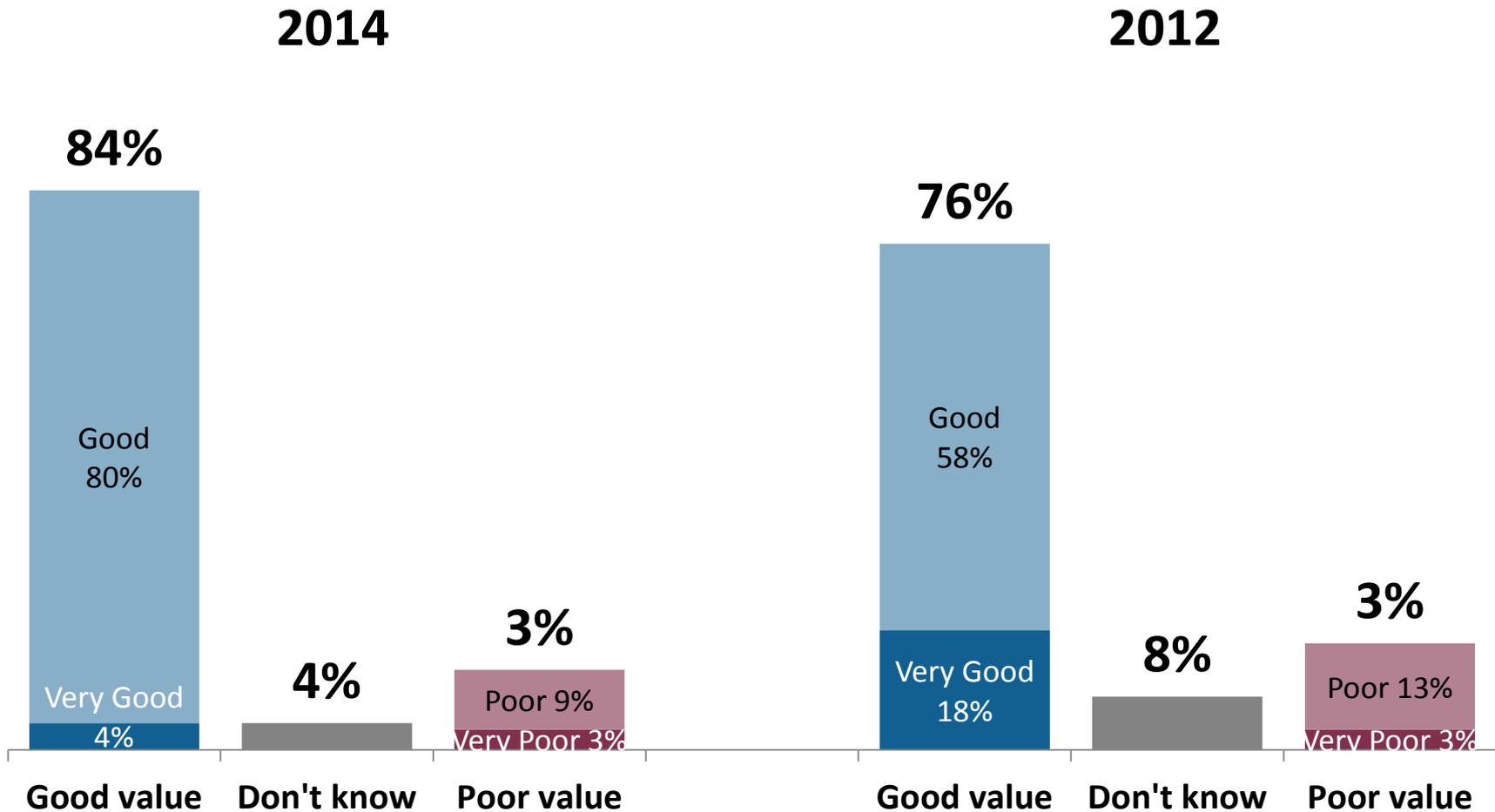
Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries?

Q53. Other than lowering the price, what else could Washington State Ferries do to help you move freight on the ferries?

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'.



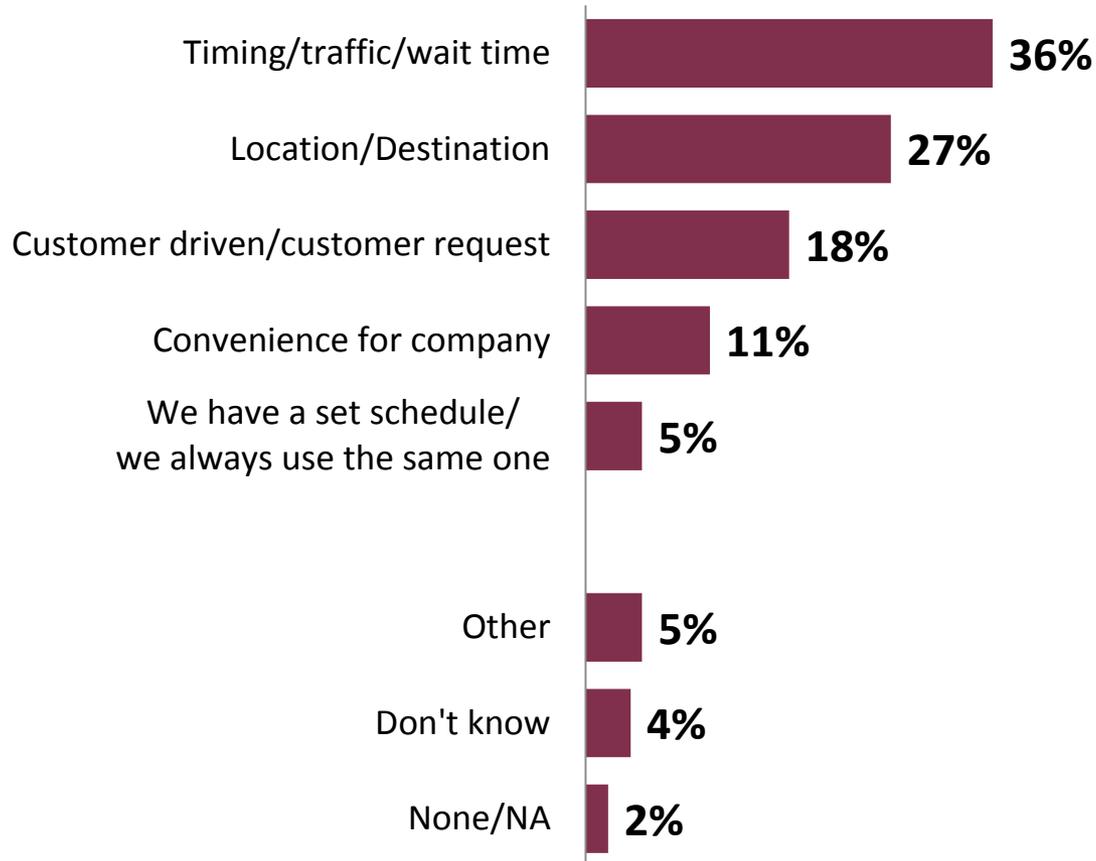
Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

Travel Behavior Influences



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

Factors Influencing Decision



Q18. What factors impact your decision most as to which specific ferry sailing to take?



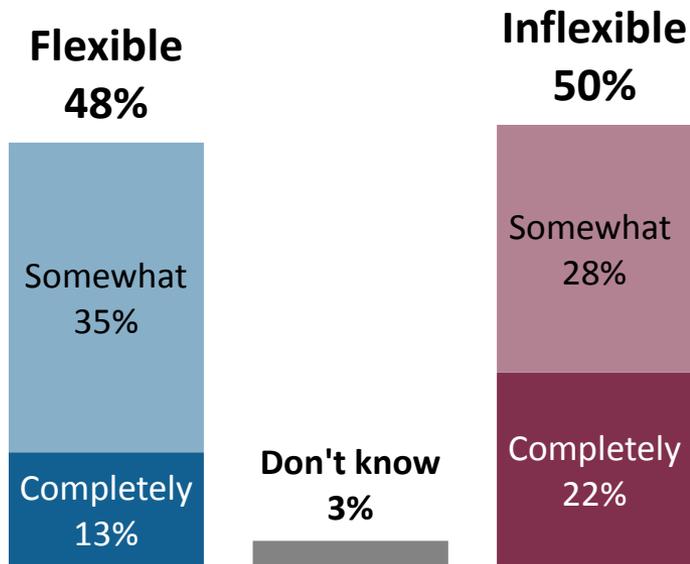
Travel Flexibility

Scheduling Flexibility

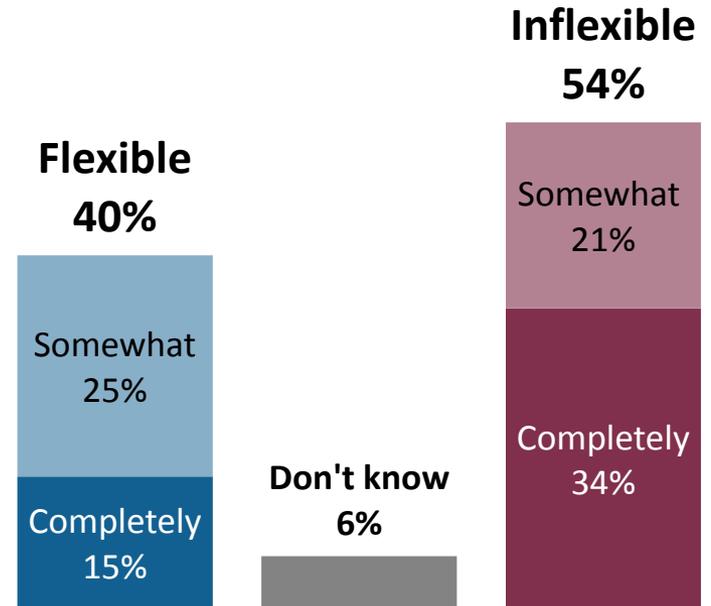


About half have at least some flexibility when selecting travel time and 40% have at least some flexibility when selecting travel day.

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... ?



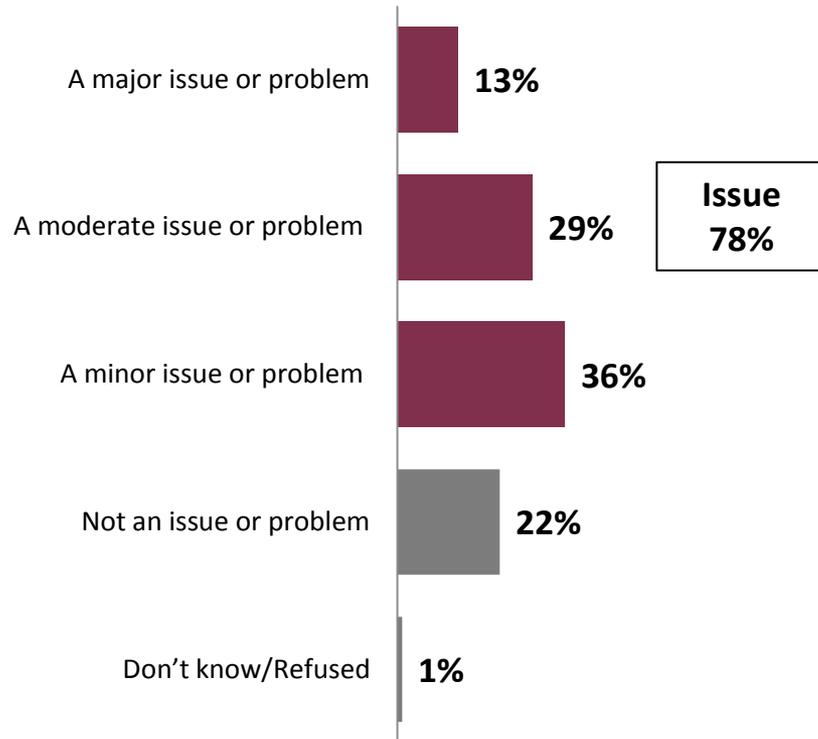
Wait Times

Wait Times



Three quarters (78%) 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 2.6 boat wait, although sample sizes are very small.

Impact of Wait Times



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

Q23. One problem commercial vehicle drivers have reported is how long they have to wait for a boat. How 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]

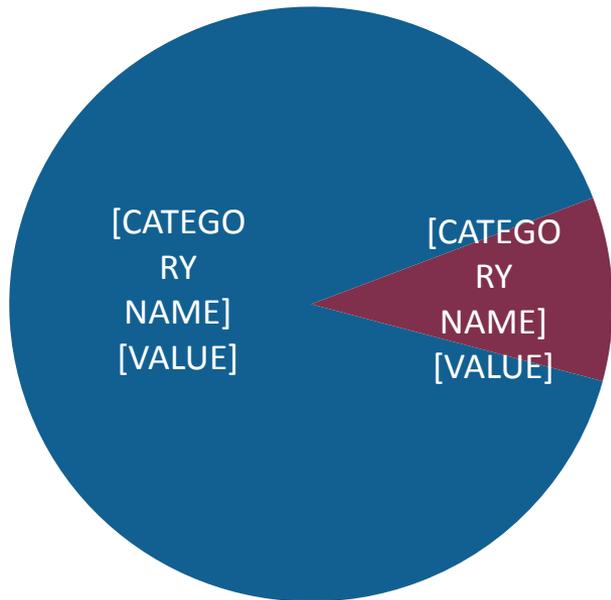
Q25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Reservations

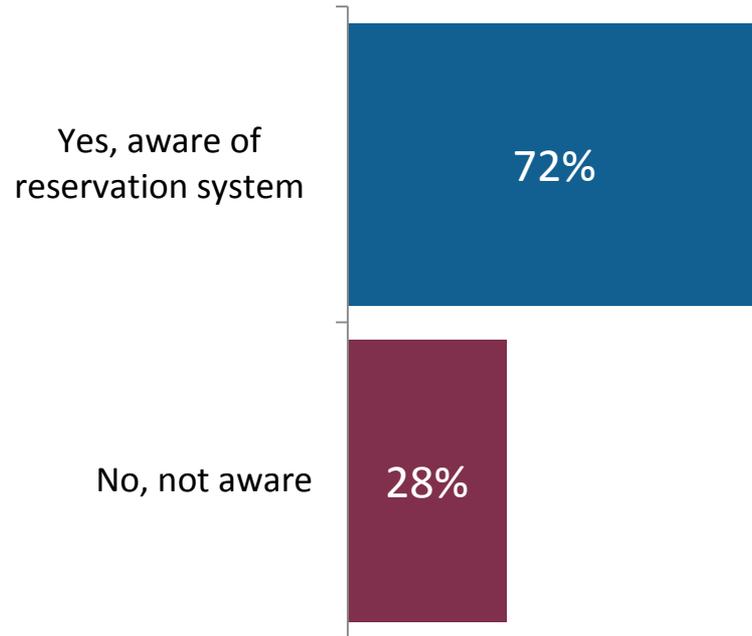


Most companies (90%) have business account with WSF. However, just more than a quarter are not aware of WSF's commercial vehicle reservation system.

Have a Business Account



Aware of Reservation System



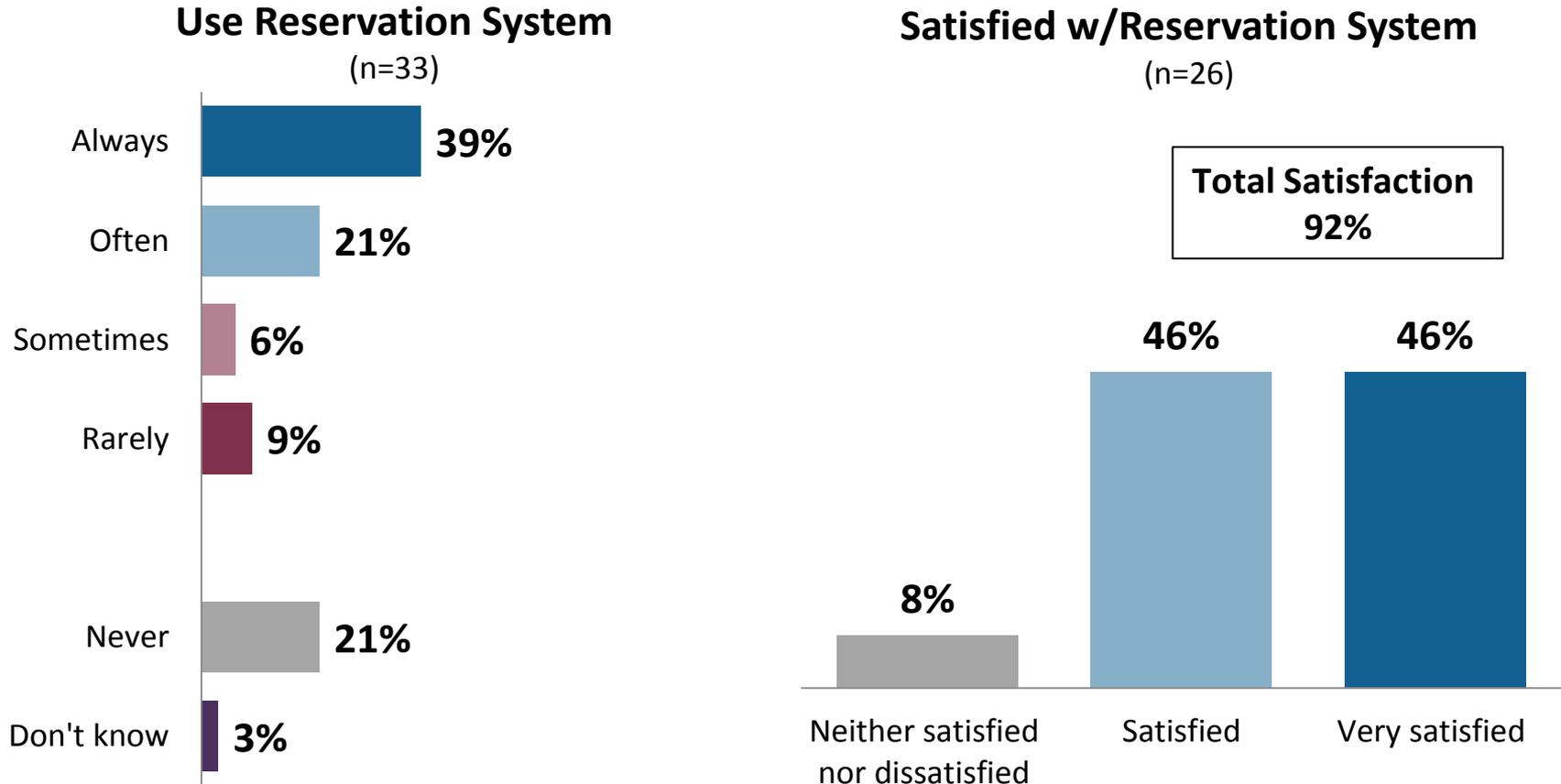
Q27. Do you have a business account with Washington State Ferries?

Q28. Are you aware Washington State Ferries offers a commercial vehicle reservation system?

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.



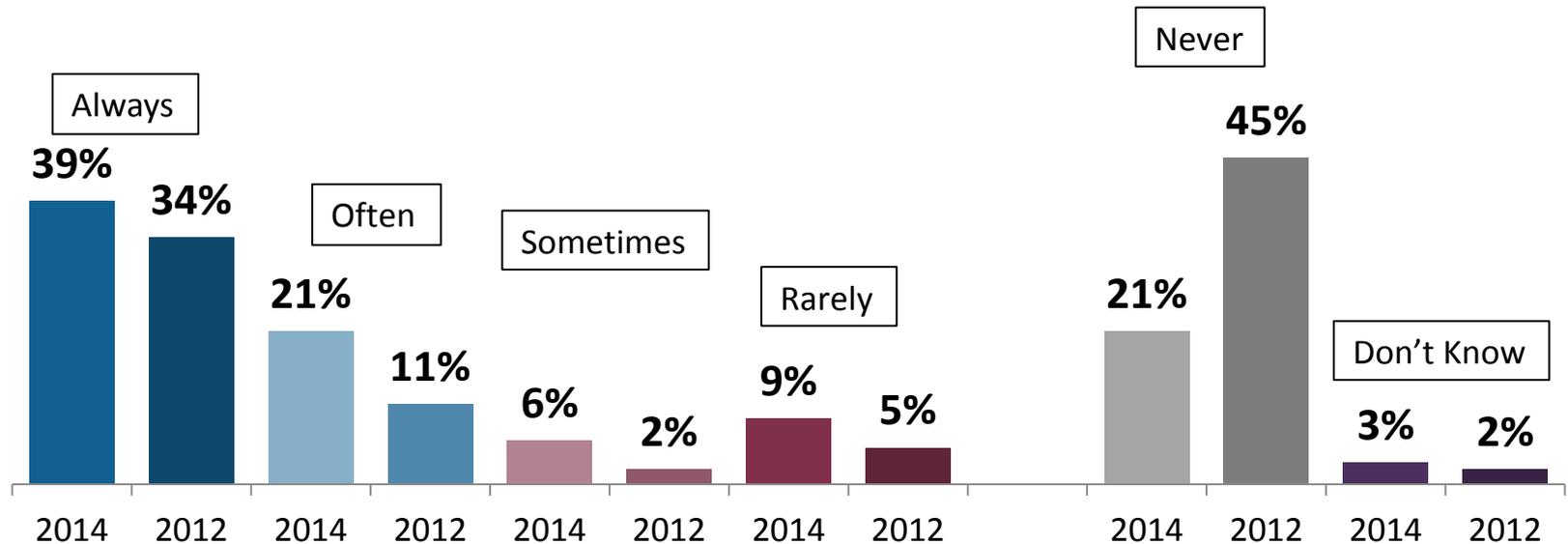
Q29. As you may know, Washington State Ferries offer a commercial vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's commercial vehicle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

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

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%.



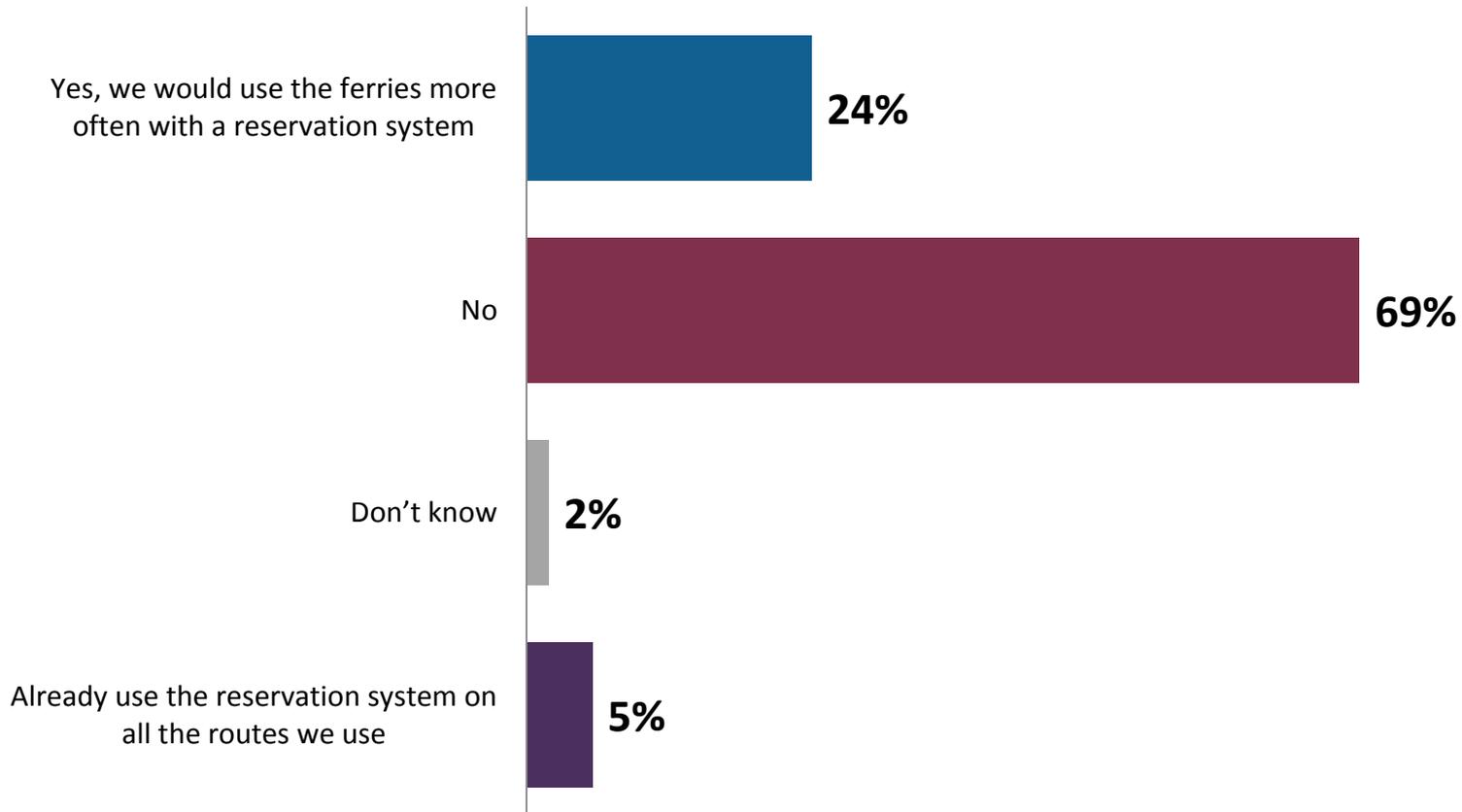
Q29. As you may know, Washington State Ferries offer a commercial vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's commercial vehicle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

Introduction to Reservation System

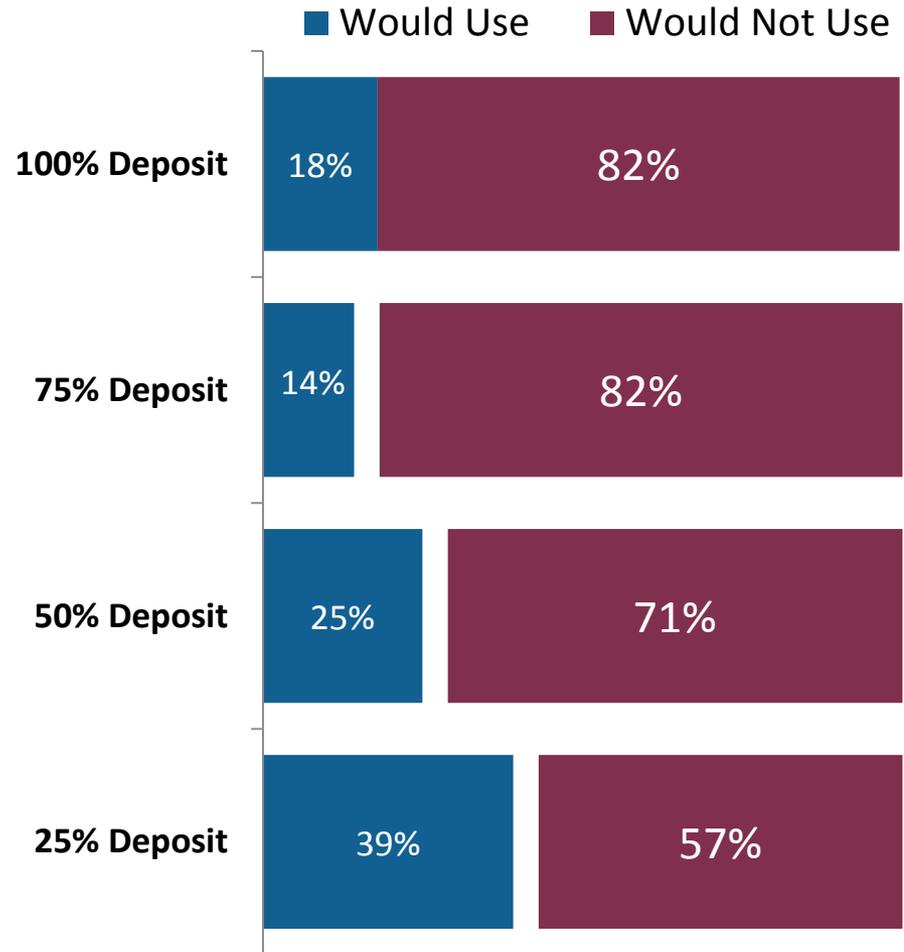


Of those who were not aware of the commercial reservation system (n=28), most (82%) say they would be unlikely to use the system as described, even with just a 25% deposit.

The current WSF commercial vehicle reservation system has the following features:

- *Space is available for reservations up to one month 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 and are charged a no-show fee; 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.*

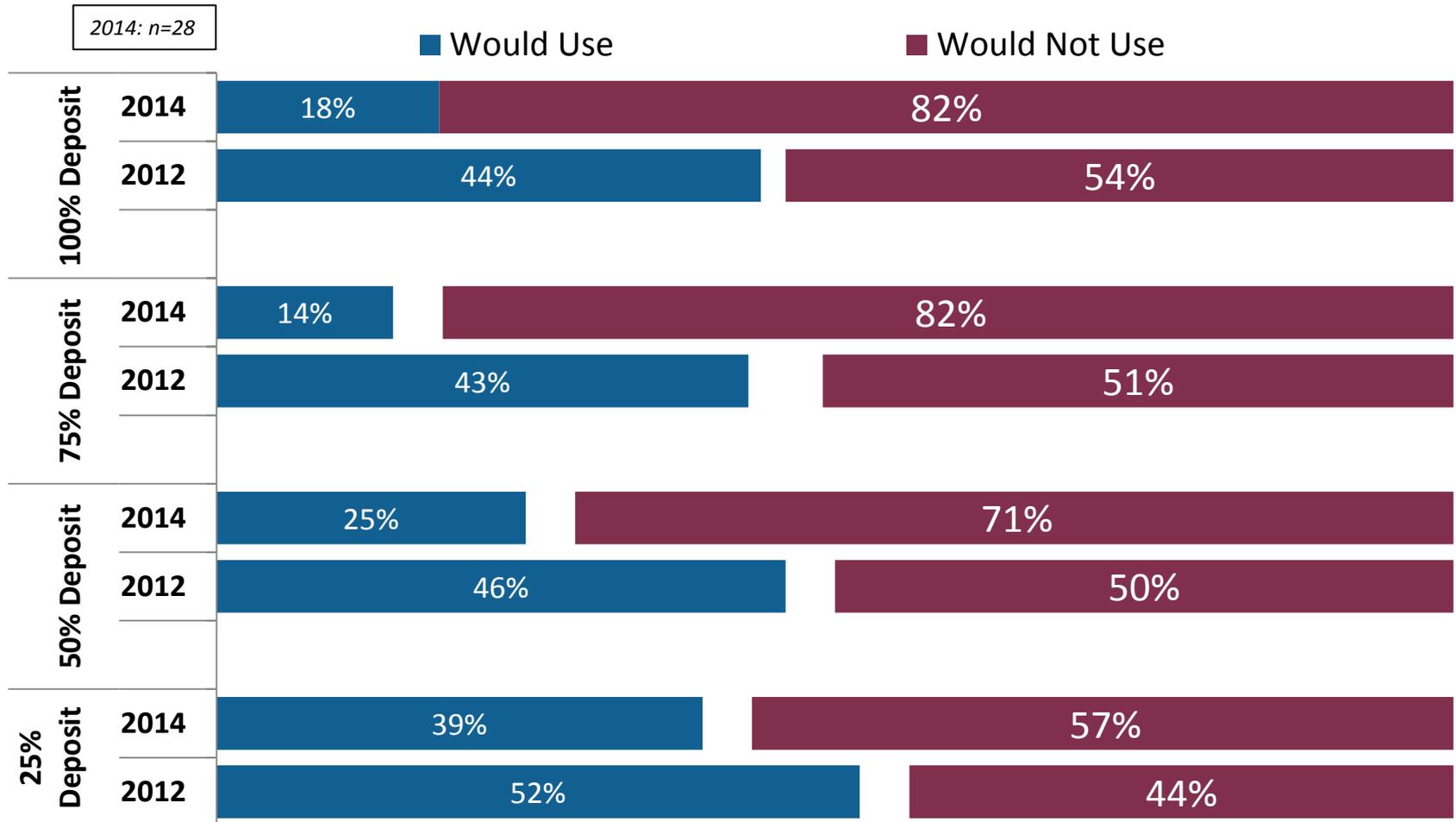
Q33-36. How likely would your company be to use this commercial vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say... ?



Reservations - Comparison



Overall, customers seem much less likely to use the commercial vehicle reservation system than they were two years ago.



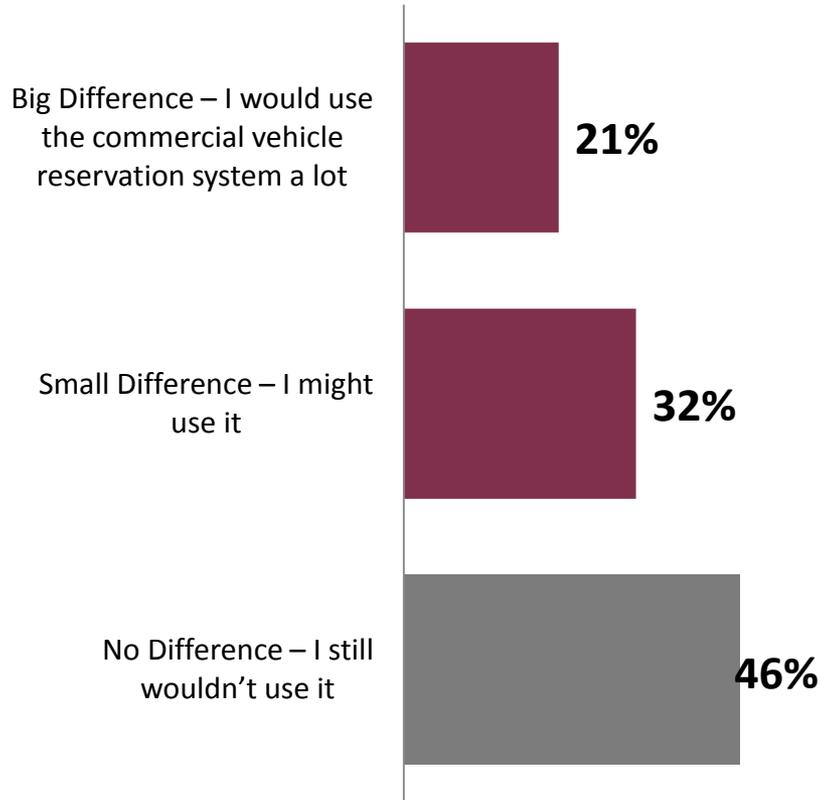
Q33-36. How likely would your company be to use this commercial vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say... ?

Reservations (cont.)

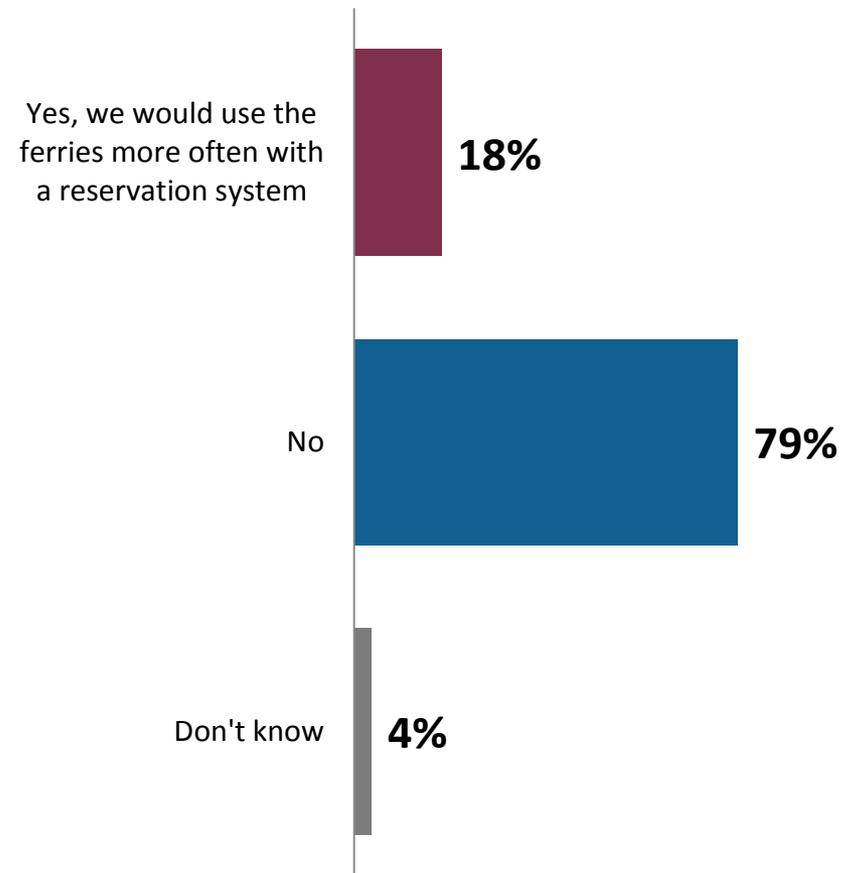


Half (53%) say not charging a no show fee would make some difference in their likelihood to use the system. Only one-in-five (18%) say they would use WSF more often with a reservation system.

Difference if No Fee



Use WSF More Often



Q38. How much of a difference would it make in your use of a commercial vehicle reservation system if WSF didn't charge the no show fee if you ended up traveling from that terminal on a different sailing anytime that same day? Would you say that would make a... ?

Q39. For the ferry routes you use, would you use the ferries more often as a result of having a commercial vehicles reservation system on them?

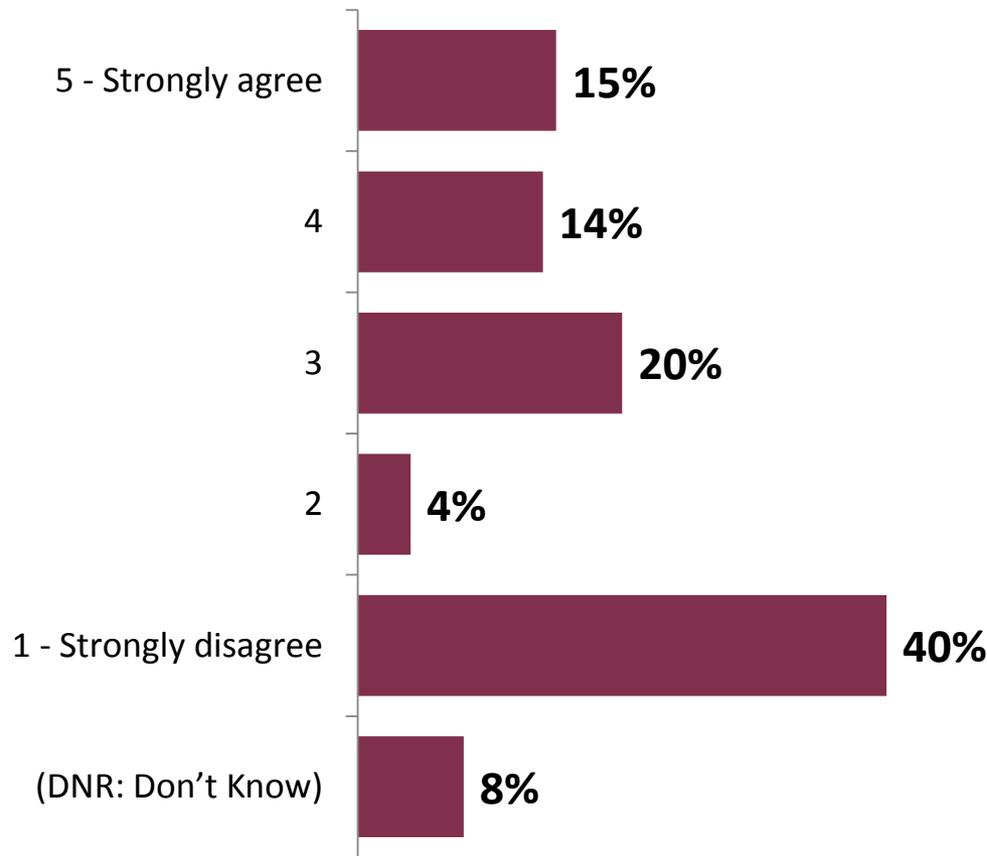


Potential Congestion Pricing

Congestion Pricing



By a 44% to 29% margin, freight shippers disagree that they should be charged a premium over regular freight fares if they travel during peak periods – even when coupled with a discount for non-peak travel.

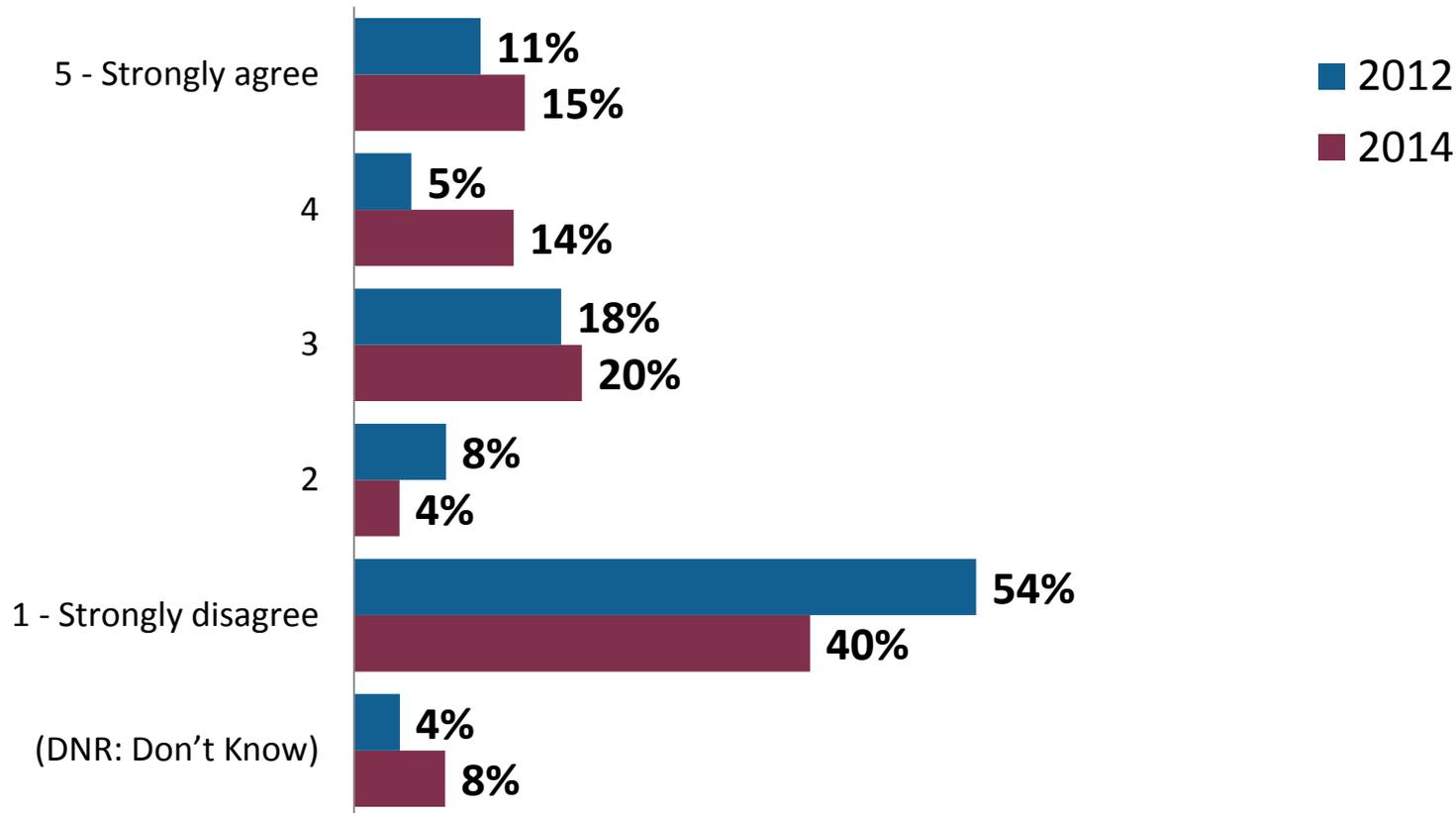


Q40. Using a 5-point scale where 1 means “strongly disagree” and 5 means “strongly agree,” to what extent do you agree or disagree with the following statement? In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount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

Congestion Pricing - Comparison



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



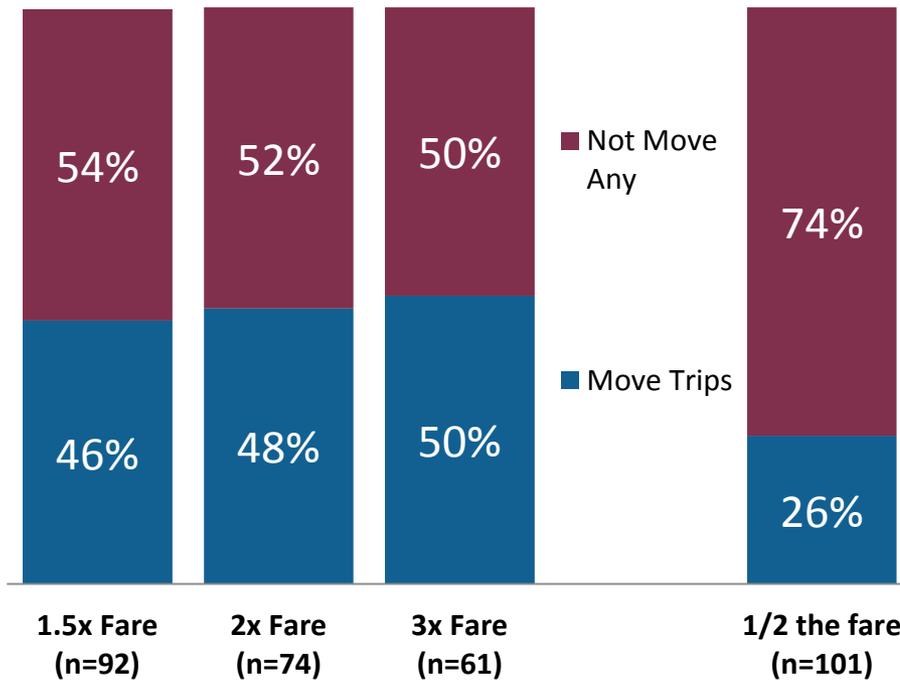
Q40. Using a 5-point scale where 1 means "strongly disagree" and 5 means "strongly agree," to what extent do you agree or disagree with the following statement? *In order to reduce peak travel period congestion, freight customers should be charged a premium over regular freight fares but receive a discount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

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)

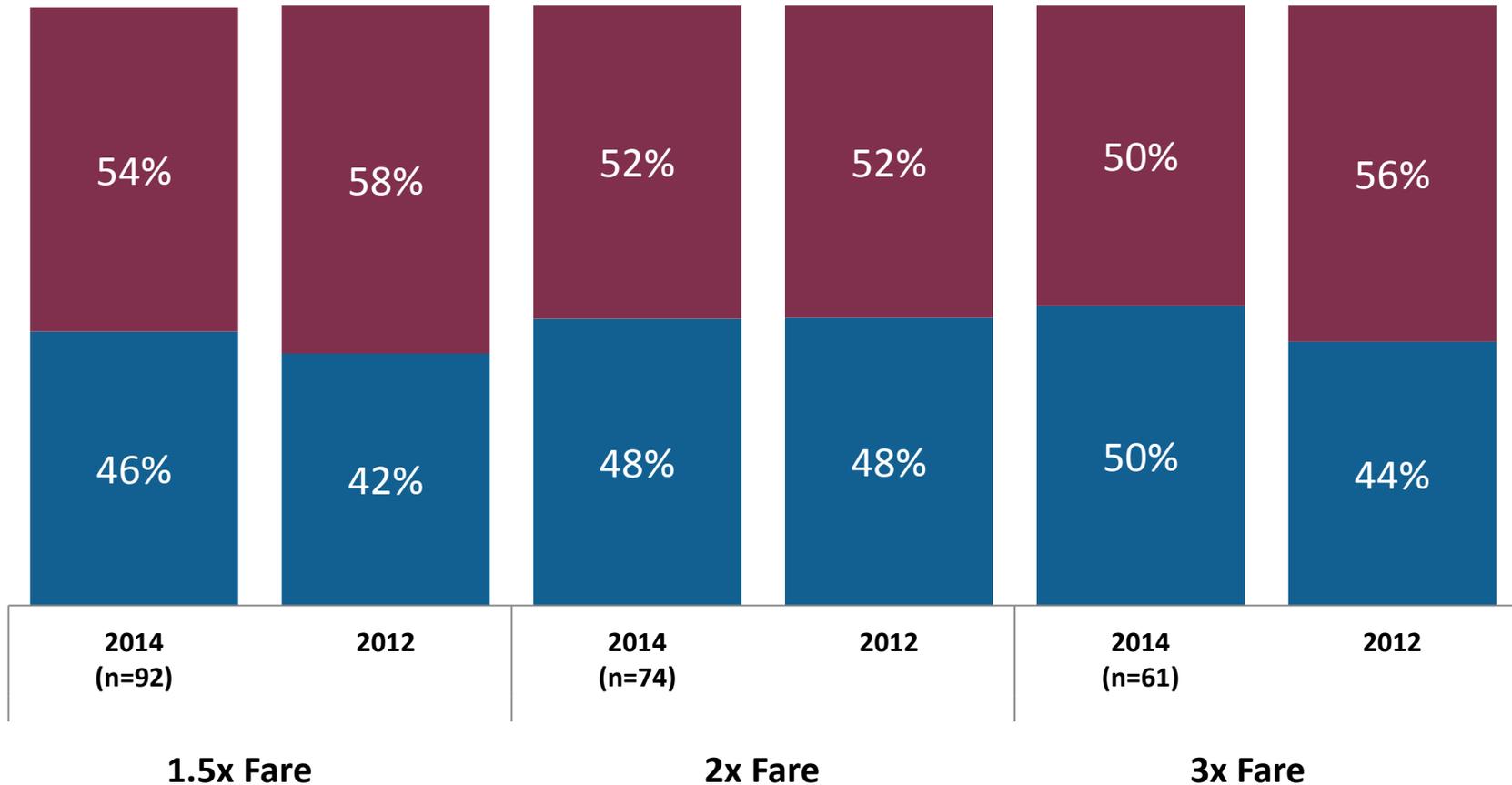
Congestion Pricing - Comparison



The likelihood to move trips has increased slightly since 2012

Would Move Trips to Off Peak Times

■ Not Move Any
■ Move Trips



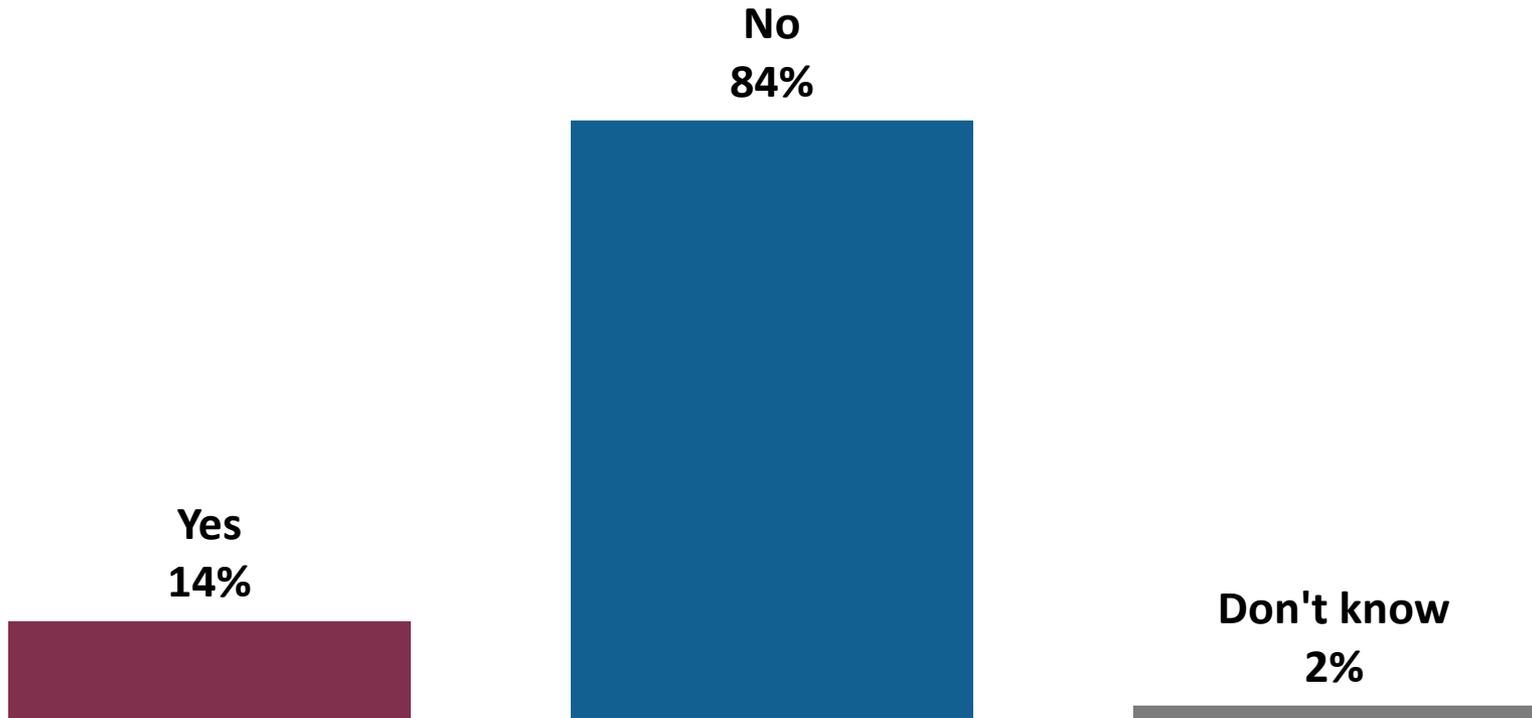
Q41-43. If freight customers who use the ferry during peak travel periods were charged one and a half times/double/three times the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

Congestion Pricing – Free Secure Parking



Most freight customers say a secure parking area on the arrival side would not make them more likely to schedule ½ priced late night ferry sailings.

Impact of Free/Secure Parking

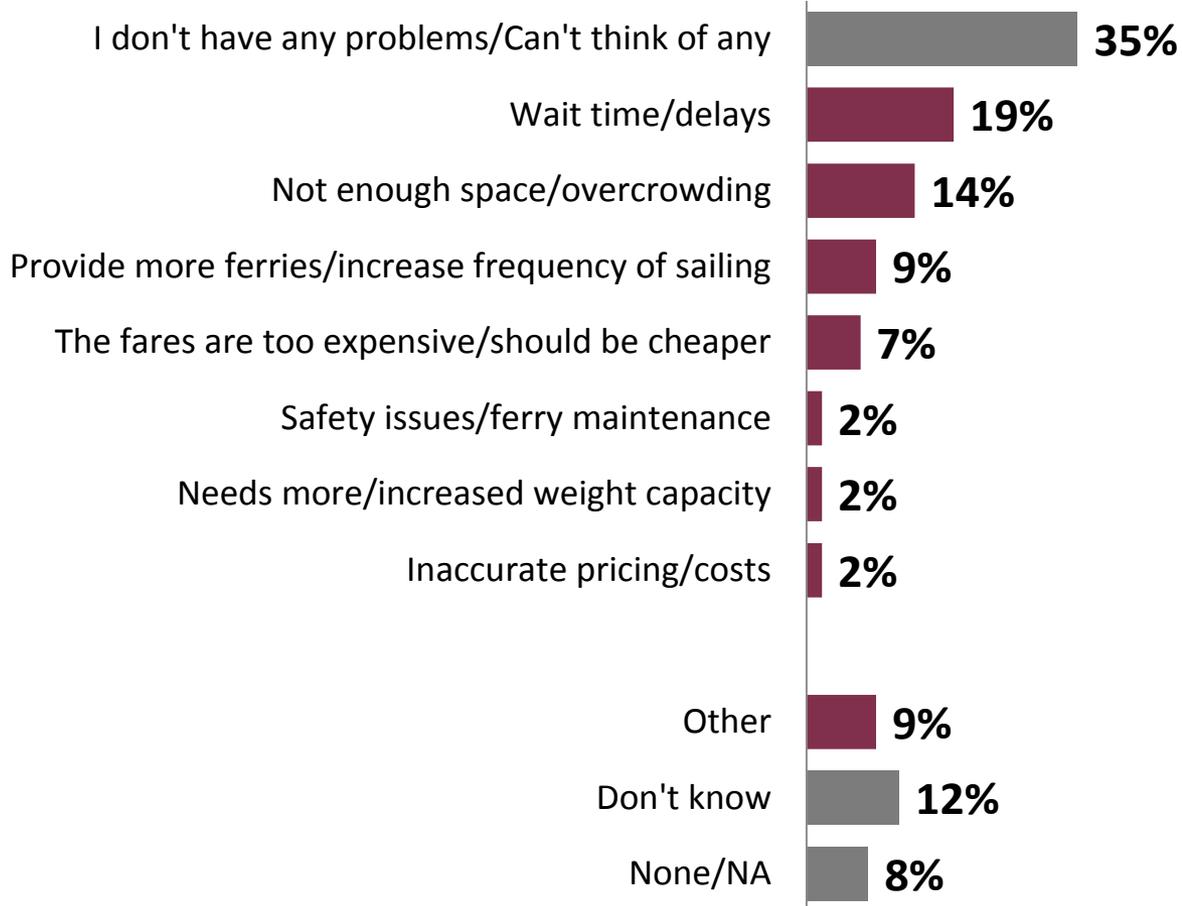


Q46. Would a free secure parking area on the arrival side for late night truck drivers make you more likely to schedule a truck for the half-price late night ferry sailings between 9pm and 5am?

Issues Facing WSF



More than half (55%) do not mention any specific problem with freight shipping on Washington State Ferries. Among those that do mention an issue, the top concerns center around wait times and space.



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?