



Ferry Riders Opinion Group (FROG) Survey Panel May 2016 Survey of Freight Shippers Using WSF

Presentation to the Washington State Transportation Commission
July 19, 2016



Methodology



- ▶ Telephone survey of Freight Shippers on WA State Ferries
- ▶ May 23rd – June 3rd, 2016
- ▶ 100 total interviews; see Appendix for list of companies
- ▶ Respondents were screened to meet the following criteria:
 - Be the person responsible for scheduling freight trips on ferries for the trucks in their fleet
 - Use WSF to transport goods and services by truck
- ▶ Interviewing conducted by trained, professional interviewers

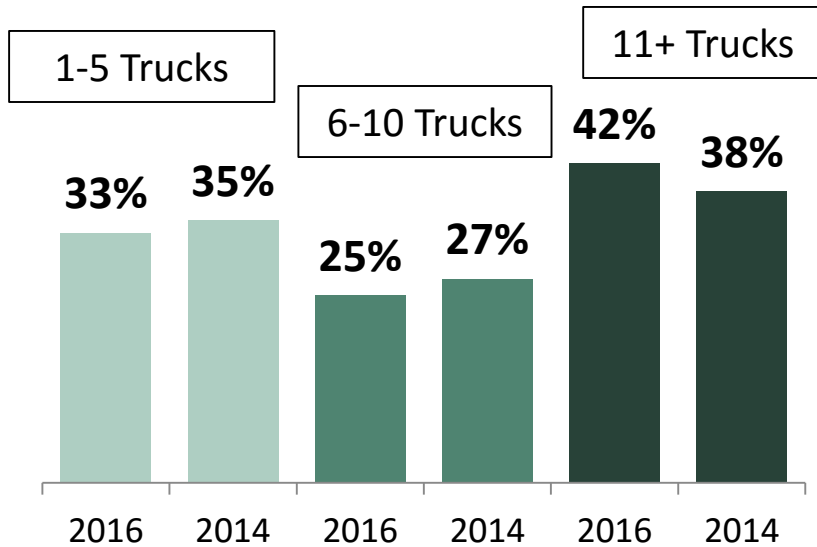
Please note that due to rounding, some percentages may not add up to exactly 100%.

Fleet Profile – Comparison

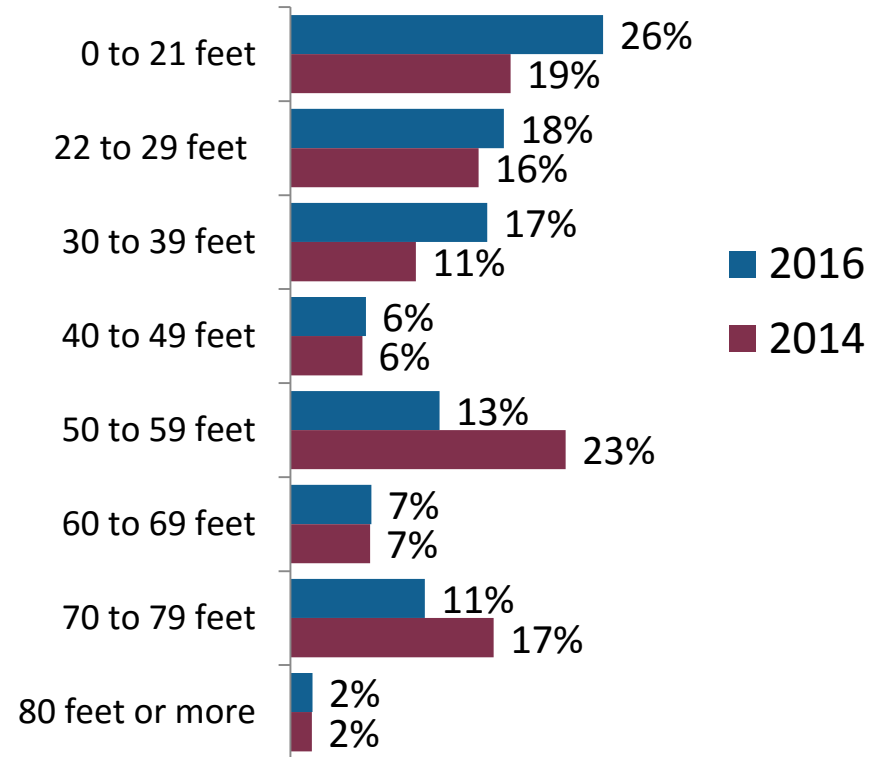


Fleet sizes for the freight companies in the 2016 survey are similar to the 2014 survey. Overall truck size has decreased since 2014 when 49% of trucks were 50 feet or longer compared to only 33% in 2016.

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



2016: n=100
2014: n=101



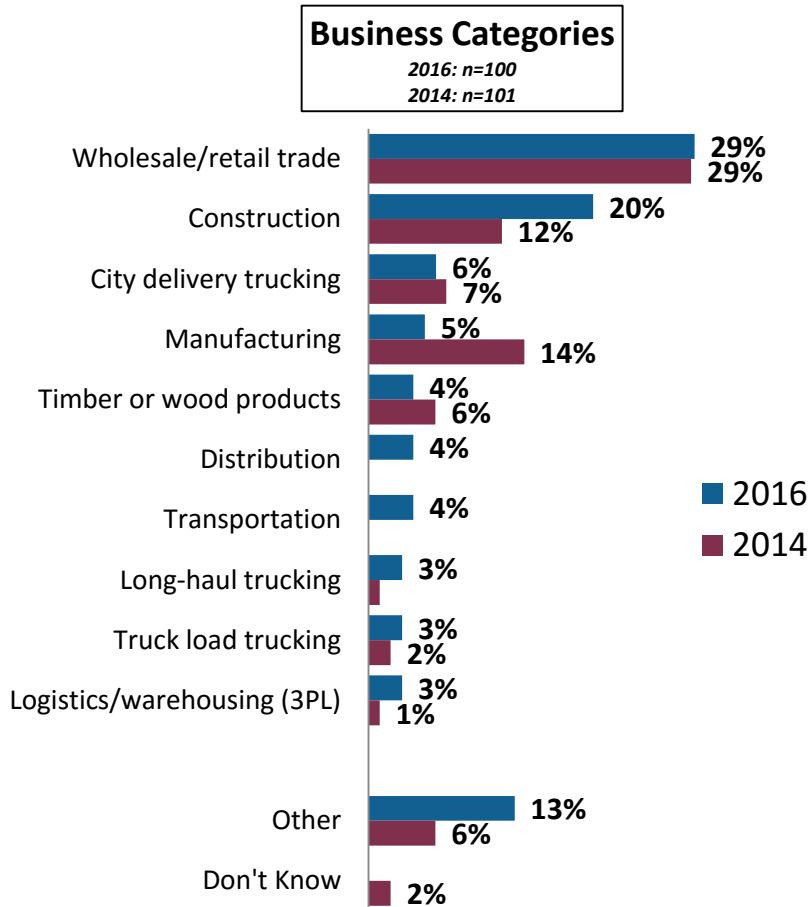
Q2. Approximately how many trucks are in your fleet in total? An estimate is fine.

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 Profile – Comparison



Construction is up from 12% in 2014 to a fifth in 2016 (20%). Manufacturing decreased from 14% to 5% and wholesale/retail trade did not change. Many of these differences are a function of the type of companies interviewed.



Location Delivered to (by types)	Total		Most Freight	
	2016	2014	2016	2014
Retail or commercial businesses	53%	56%	27%	19%
Residential locations	33%	40%	27%	30%
Construction sites	28%	30%	23%	41%
Warehouses	26%	8%	10%	--
Some other type of place or location	10%	6%	3%	4%
School/educational locations	2%	3%	--	--
Don't Know	3%	3%	10%	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?

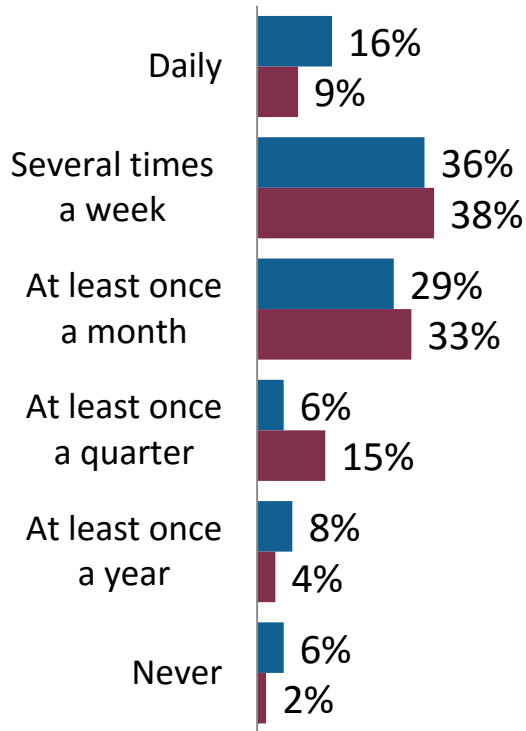
Ferry Usage – Comparison



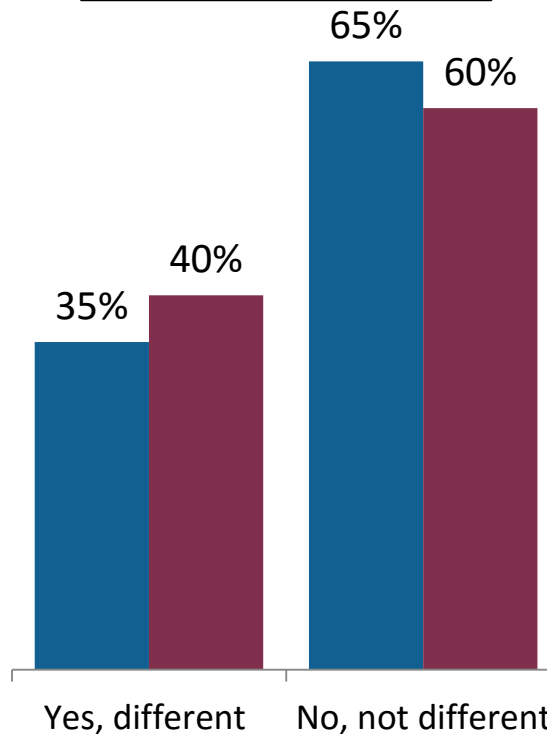
Frequency of ferry trips and seasonal truck crossings are similar in 2016 and 2014. Average number of trips in both summer and winter have fallen dramatically.

■ 2016 ■ 2014

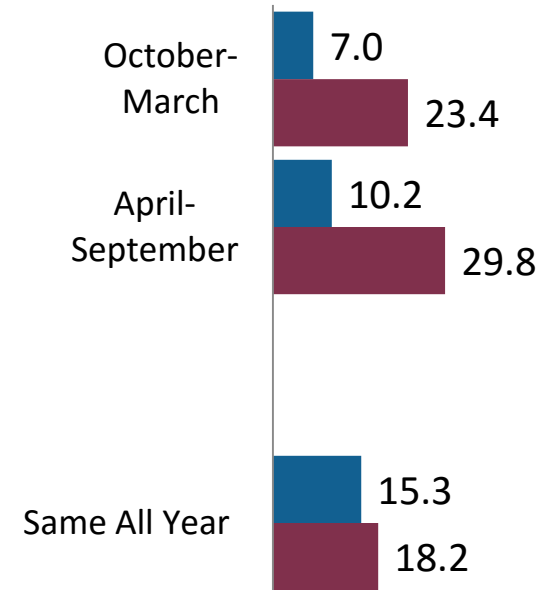
Frequency of Ferry Trips



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 – Comparison



As in 2014, Edmonds/Kingston is the most frequently used route overall. Unlike 2014, Mukilteo/Clinton is the single most used route in 2016.

Route	Total Use		Most Used	
	2016	2014	2016	2014
Edmonds / Kingston	41%	36%	19%	20%
Mukilteo / Clinton	33%	30%	23%	14%
Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	33%	29%	10%	8%
Seattle / Bainbridge	28%	23%	15%	14%
Fauntleroy / Vashon	15%	14%	2%	--
Coupeville / Port Townsend	15%	12%	2%	2%
Seattle / Bremerton	12%	14%	4%	12%
Vashon / Southworth	10%	10%	2%	4%
Point Defiance / Tahlequah	8%	6%	2%	2%
Fauntleroy / Southworth	7%	6%	--	--
Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor	7%	9%	--	--
Anacortes / Sidney	6%	3%	--	2%
Routes used Equally	--	--	19%	14%
Don't know/Refused	5%	5%	2%	6%

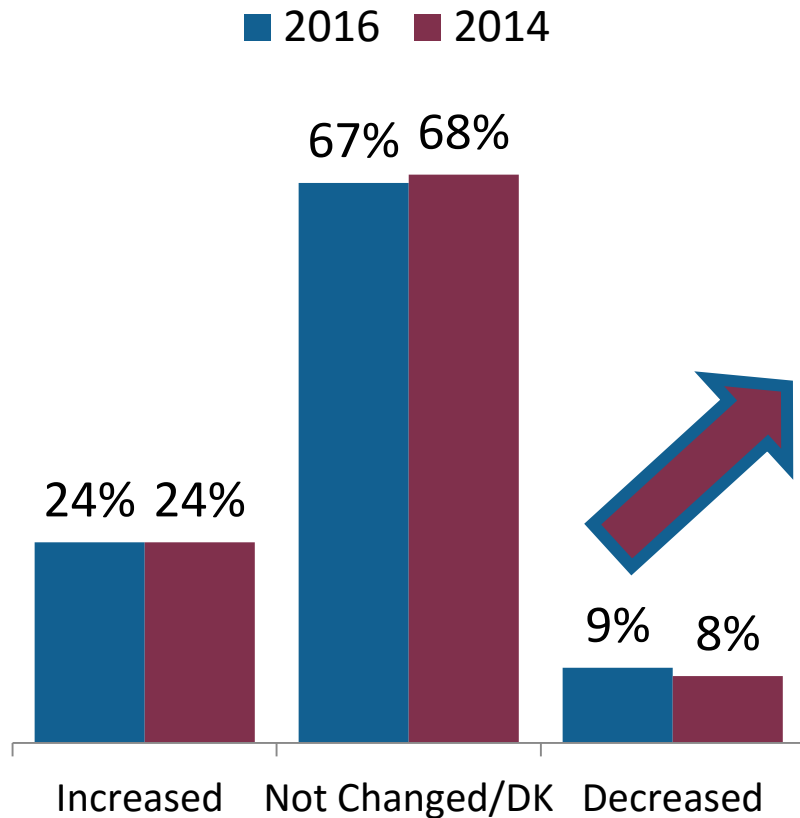
Q10. What ferry routes do you use for moving freight? [MULTI RESPONSE] [IF MORE THAN ONE ROUTE MENTIONED IN Q10 ASK FOLLOW-UP Q11]

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

Travel Behavior – Comparison



Travel behavior has remained consistent from 2014 to 2016.



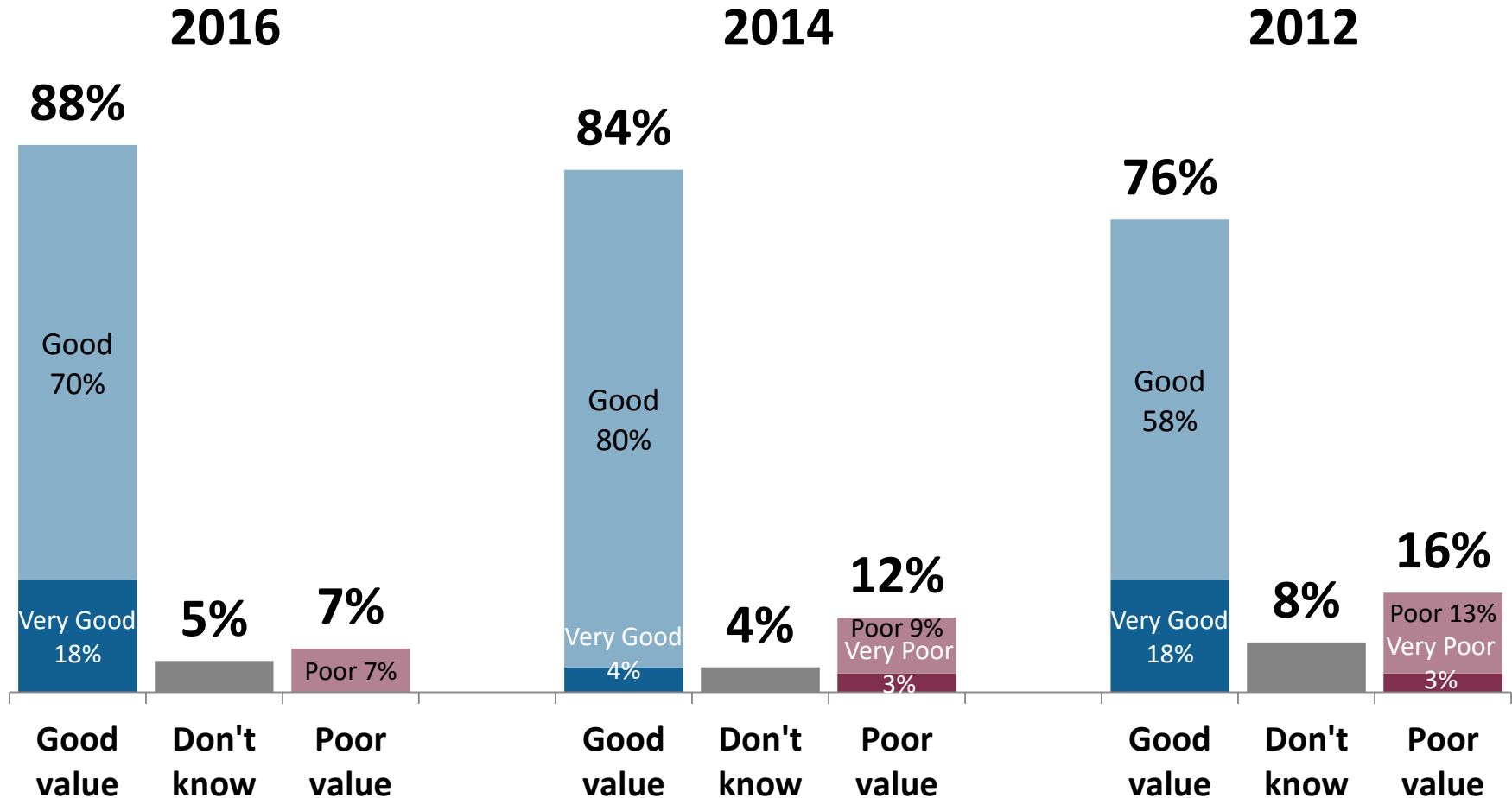
Top Reasons for Decrease	
2016 (n=9)	2014 (n=8)
Change in delivery schedule/Delivering less often (n=3)	Change in delivery schedule/Delivering less often (n=3)
Loss of customers/Less work (n=3)	Drive around instead of using ferry (n=1)

Q49. Since you or your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries... ?
 Q50. What is the primary reason for the decrease?

Value Perception – Comparison



Overall, the perception of WSF as a good value has steadily increased from 2012 to 2016. In addition, the intensity has recovered from a dip in 2014, as the percentage of companies who find it to be a 'very good value' returns to 2012 levels. No one now finds it to be a 'very poor value.'



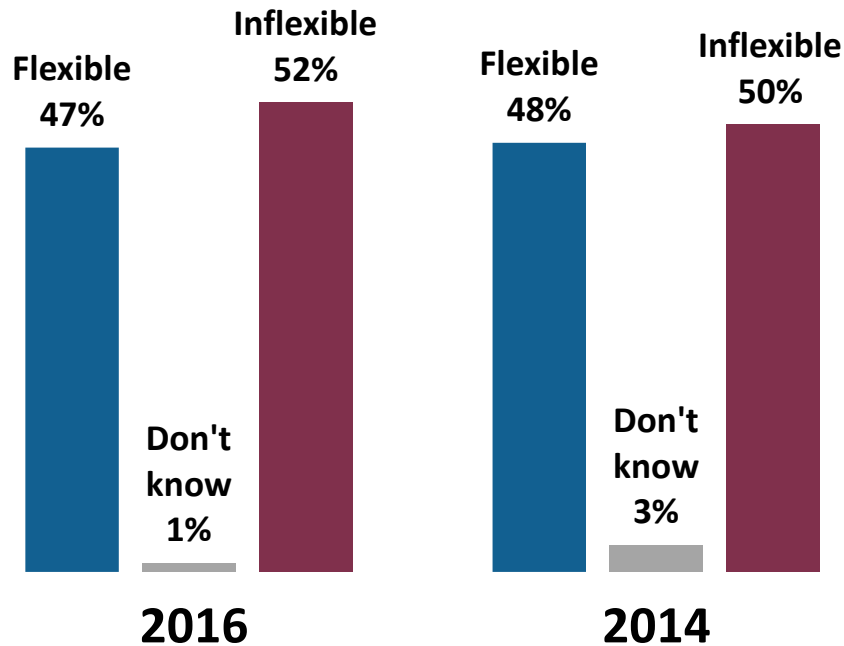
Q52. Considering your firm's experience with the ferries, which of the following phrases best describes the value to your company of using Washington State Ferries to move freight to your destination? "Value" means what you receive for the amount you pay. Are the Washington State Ferries... ?

Scheduling Flexibility – Comparison

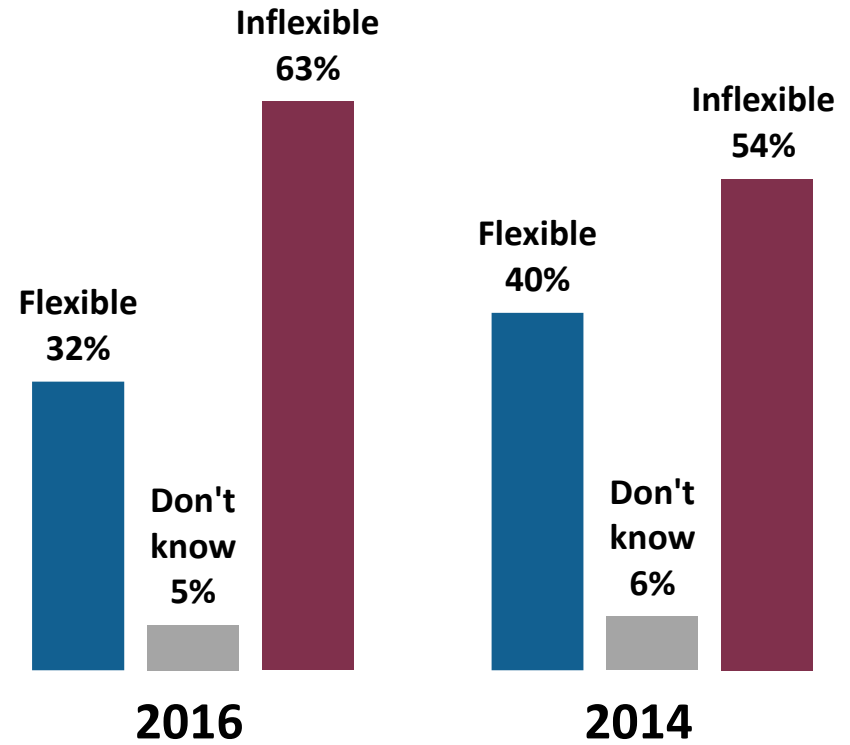


Flexibility in the day of the week that companies can schedule their drivers has decreased significantly from 2014. Forty-two percent of companies are completely inflexible, up from 34% in 2014.

Time of Day



Day of Week



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

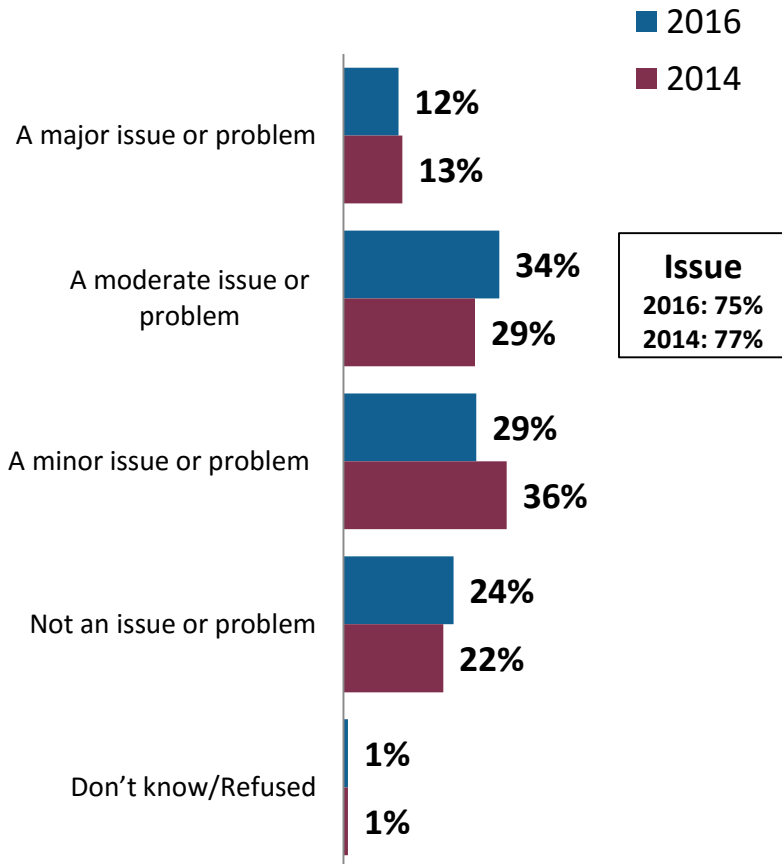
Q21. What degree of flexibility do you have when selecting travel on the ferry in terms of the day of the week you schedule your drivers? Would you say you are... ?

Wait Times – Comparison



Wait times are less of an issue now than they were in 2014.

Impact of Wait Times



Routes	% Experiencing long wait times		Avg no. of Boats to wait through	
	2016 n=75	2014 n=84	2016	2014
Anacortes / San Juans	19%	19%	1.9 [n=12]	2.6 [n=15]
Edmonds / Kingston	16%	8%	1.1 [n=10]	1.8 [n=4]
Mukilteo / Clinton	13%	12%	1.6 [n=9]	1.0 [n=7]
Seattle / Bainbridge	11%	10%	1.0 [n=6]	1.0 [n=6]
Coupeville / Port Townsend	4%	4%	1.0 [n=3]	1.5 [n=2]
Interisland San Juans	3%	4%	1.0 [n=2]	0.7 [n=3]
Seattle / Bremerton	1%	5%	1.0 [n=1]	1.3 [n=3]
Fauntleroy / Vashon	1%	5%	1.0 [n=1]	0.5 [n=2]
Anacortes / Sidney	1%	--	1.0 [n=1]	--
All routes	3%	3%	--	--
None	19%	17%	--	--
Don't know	12%	19%	--	--

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

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

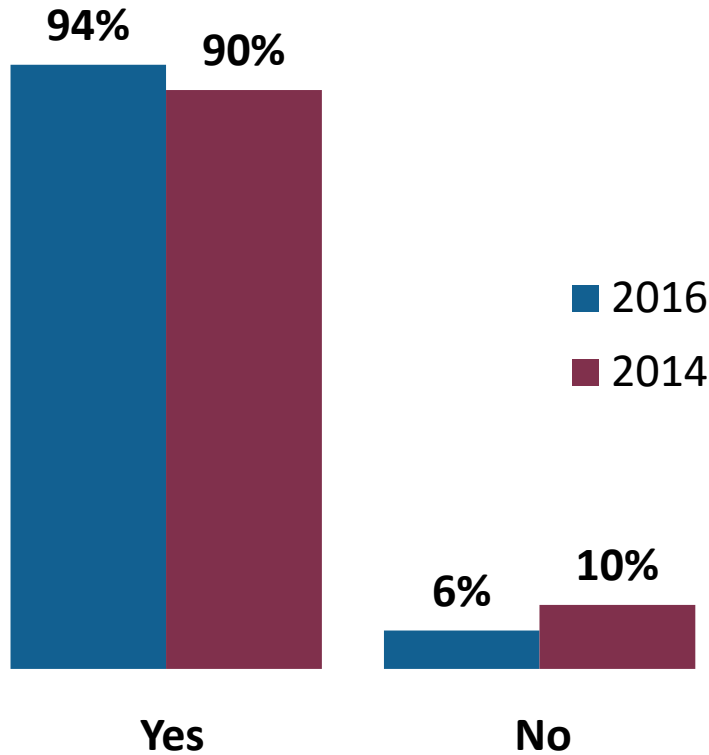
Q25. Currently, what is the average number of boats you or your drivers have to wait through? An estimate is fine.

Reservations – Awareness Comparison

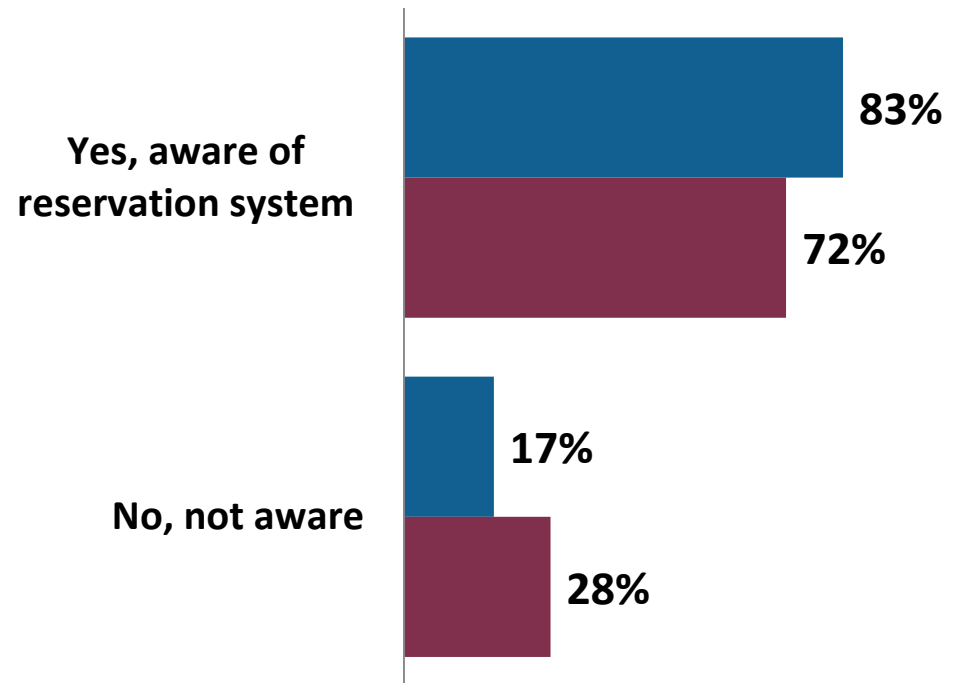


Slightly more respondents have a business account compared to 2014. General awareness of the reservation system has increased as well.

Have a Business Account



Aware of Reservation System



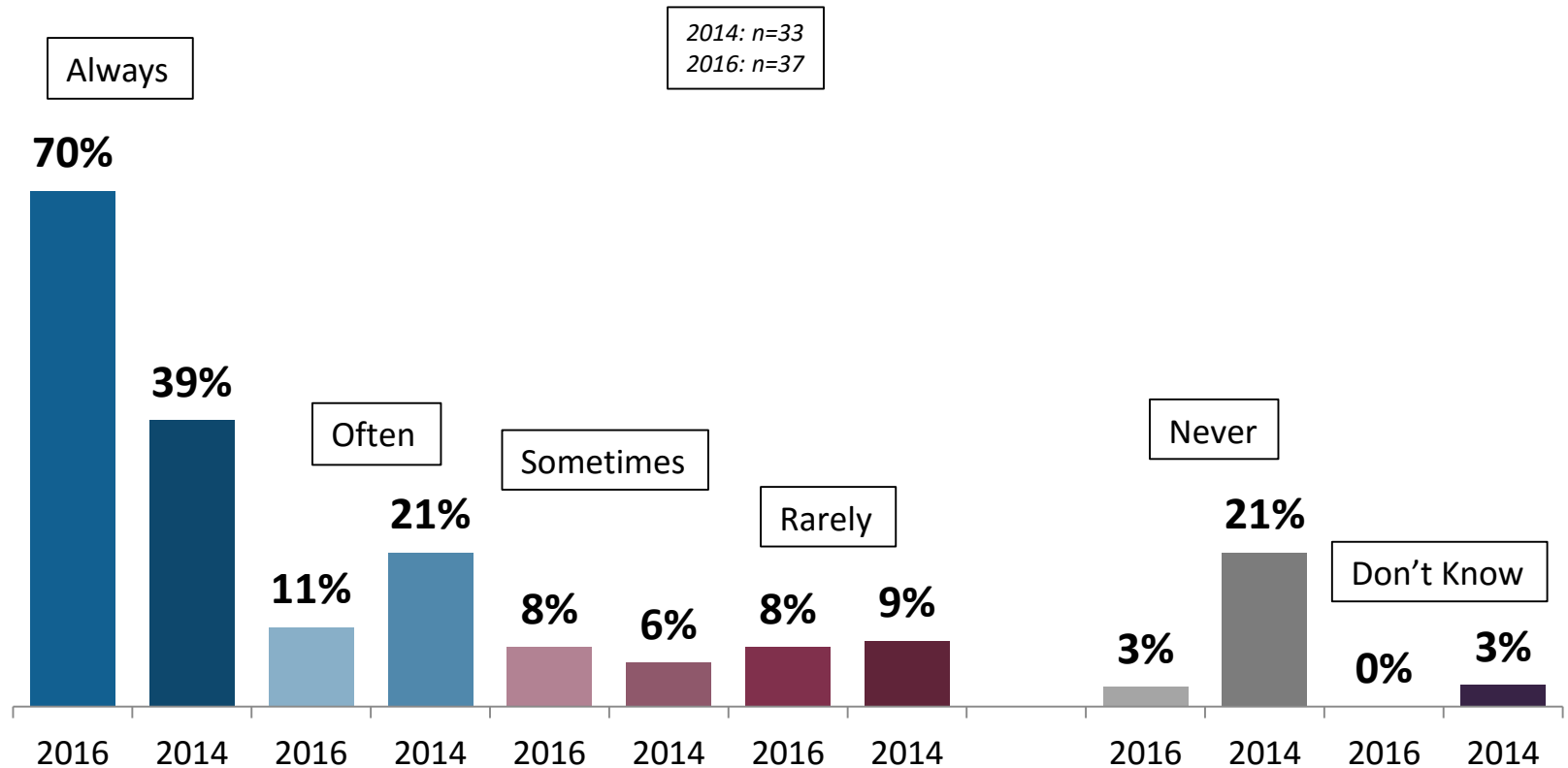
Q27. Do you have a business account with Washington State Ferries?

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

Reservations – Usage 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 21% to 3%. Additionally, the percentage of people who always use it has risen by 31%.*



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

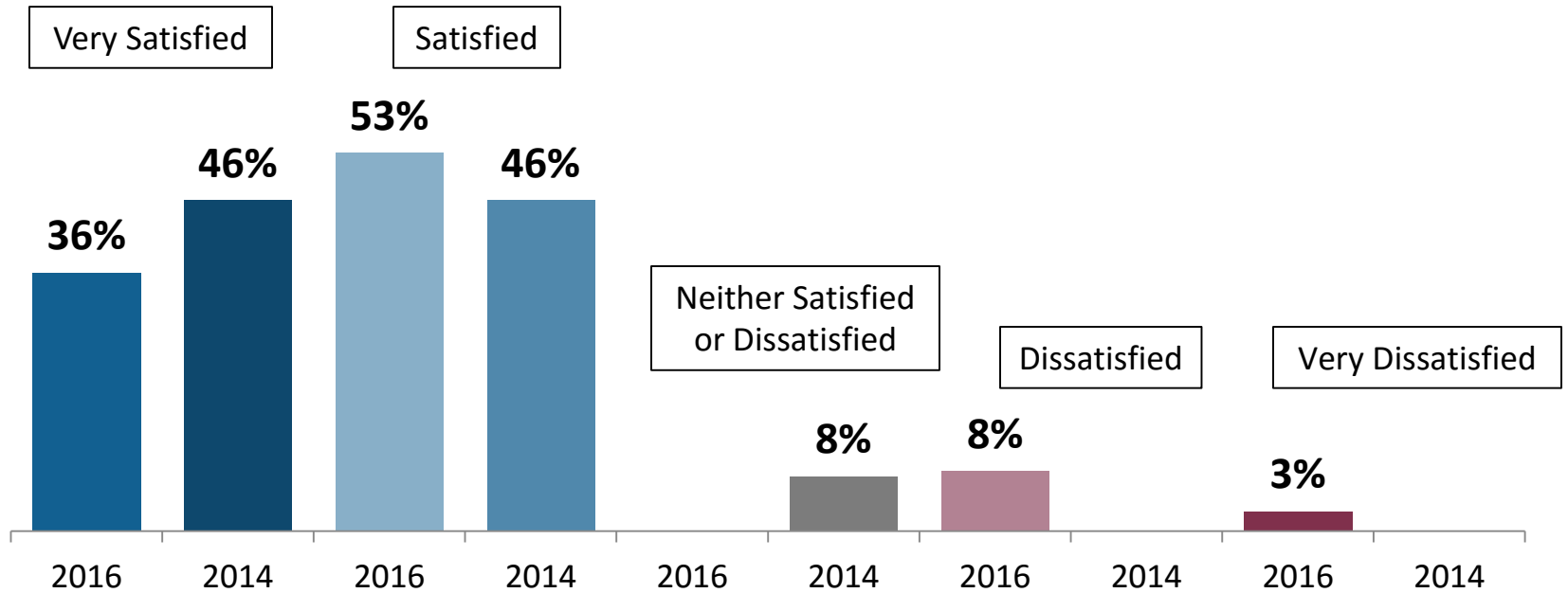
Q29. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville /Port Townsend and Anacortes routes allowing commercial customers to call ahead or go on-line to make a reservation for a specific trip. How often does your organization use WSF's vehicle reservation system?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

Reservations – Satisfaction Comparison



Overall satisfaction has decreased slightly from 2014, but the total number of companies using the system has also increased.

2014: n=26
2016: n=36



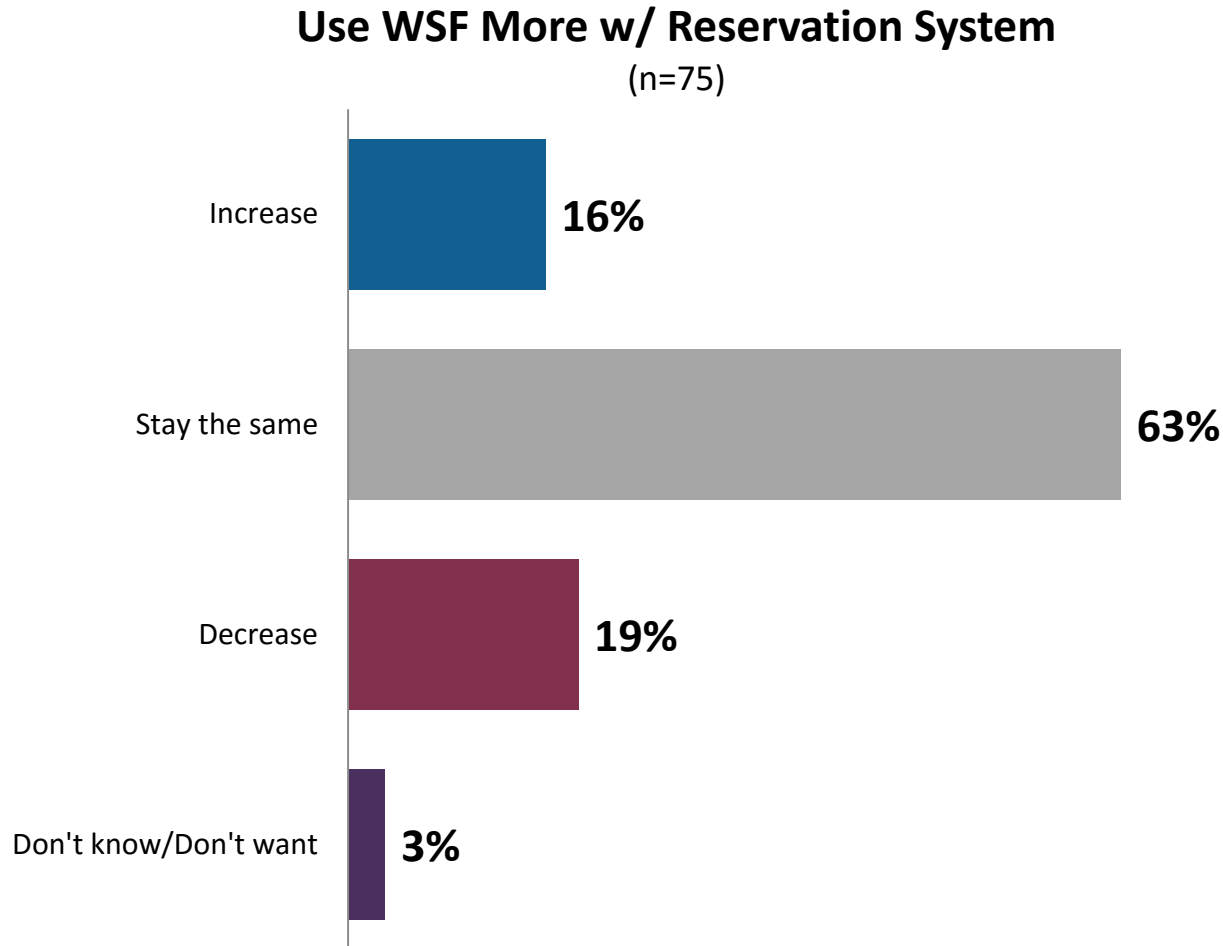
*This question changed in 2016 to omit the word "commercial" when describing the vehicle registration system.

Q30. 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=75), two thirds (63%) would not change their ferry usage given a reservation system, and only 16% would increase usage.



Q32. If all of the Central Puget Sound ferry routes had a reservation system, would your companies usage increase, decrease or remain the same?

Introduction to Reservation System

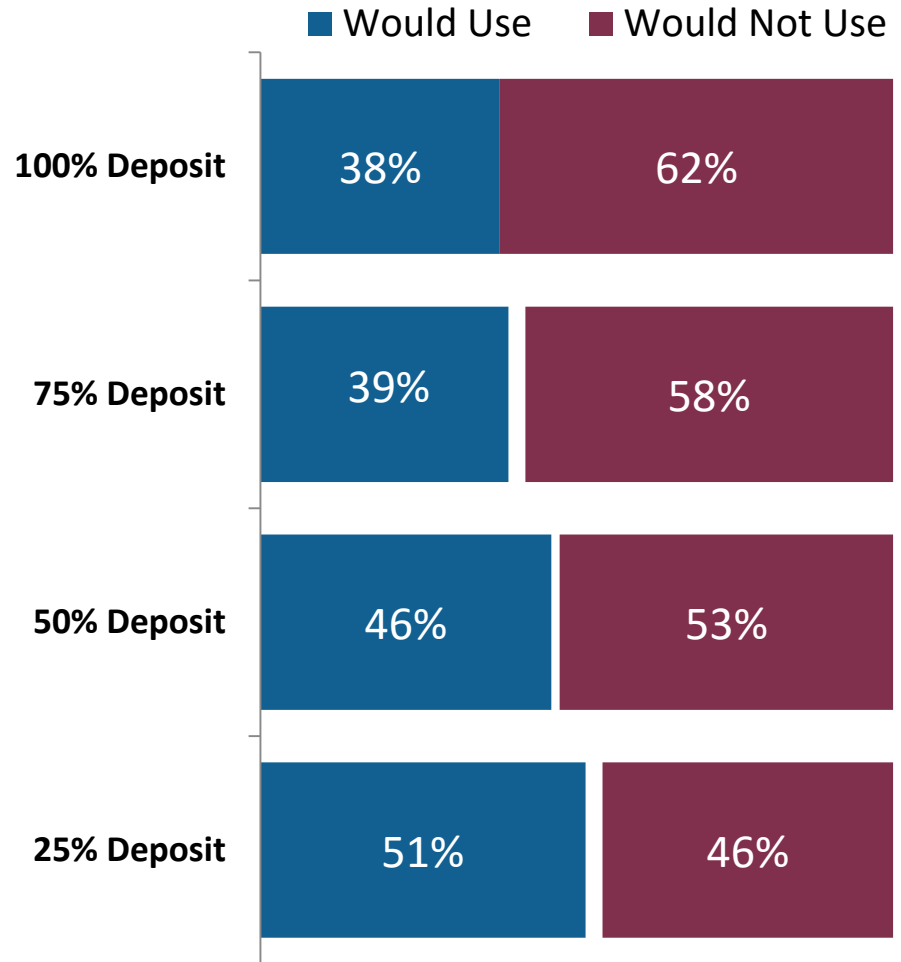


Of those who would be open to a vehicle reservation system for Central Puget Sound routes (n=74), over half (51%) say they would be likely to use the system as described with a 25% deposit.

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.*

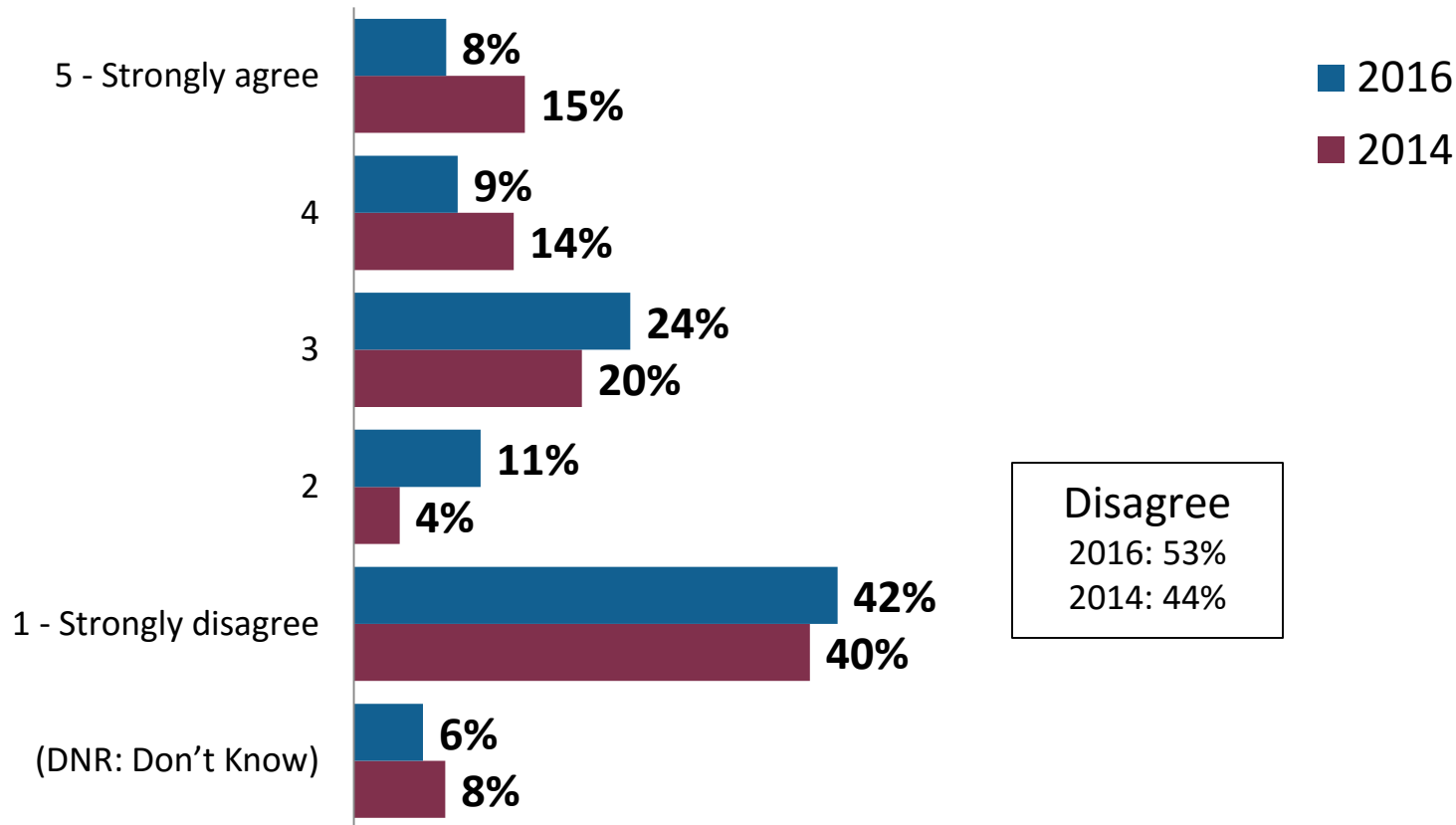
Q33-36. How likely would your company be to use this vehicle reservation system knowing you would pay XX% of the fare if your truck wasn't there on time for boarding? Would you say... ?



Congestion Pricing – Comparison



Overall, freight shippers are more opposed to the idea of congestion pricing than in 2014 (53% vs. 44%).



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.*

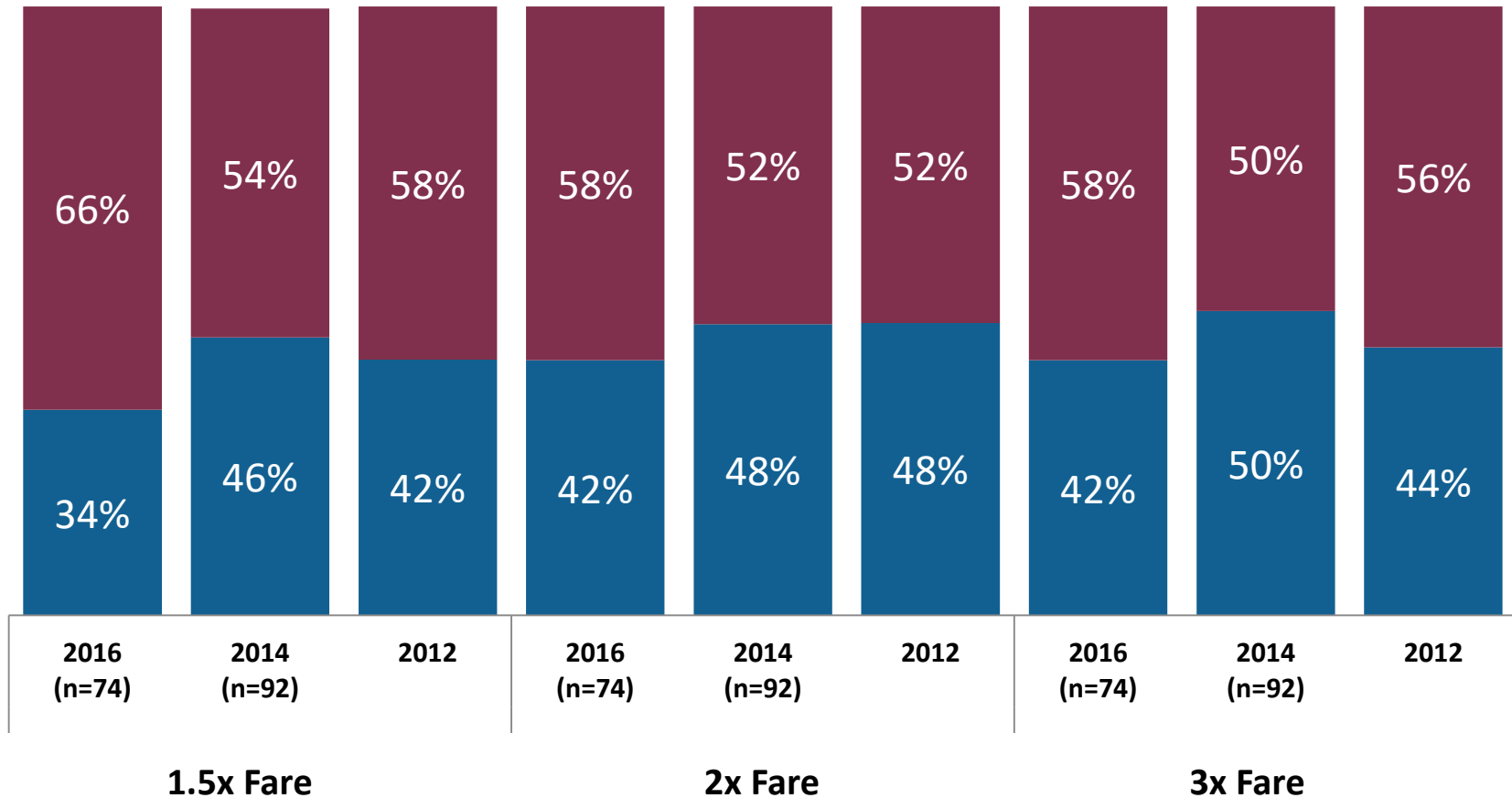
Congestion Pricing – Comparison



The likelihood of moving trips has decreased slightly since 2014.

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?



Questions & Answers



THANK YOU!

For More Information Contact:

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Company and Fleet Size



Company Name	Fleet Size	% Use WSF
NW REGION EQUIPMENT	1500	<1%
L T I INC	300	1%
NESS & CAMPBELL CRANE INC.	250	20%
SCHOOL DIST #411 ISSAQUAH	100	10%
WASHINGTON TRUCKING INC	79	10%
WSP - FOB - BELLEVUE DISTRICT	75	1%
ACE HARDWARE RETAIL SUPPORT CTR	60	42%
DIETRICH TRUCKING LLC	58	9%
NORTHWEST ASPHALT INC	50	20%
DUNN LUMBER CO INC	40	88%
NELSON TRUCKING CO INC	40	8%
SCHOOL DIST #306 LAKEWOOD	31	6%
STATE ROOFING INC	30	100%
LENZ ENTERPRISES INC.	30	27%
LOOMIS	30	3%
PACIFIC SEA FOOD CO	28	7%
BERT MATTER INC	27	15%
AERONAUTICAL SERVICES INC	27	15%
UNITED NATURAL FOODS WEST INC	26	100%
AMERICAN BLDG & ROOFING INC	25	24%
POZZI BROS TRANSPORTATION INC	23	4%
HUTTIG BUILDING PRODUCTS	21	10%
SCHWANS HOME SERVICE	21	5%
QUALITY TOWING INC	20	100%
SHRED-IT OF WESTERN WASHINGTON	20	10%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
PARRISH TRUCKING INC	19	26%
R L & J VENTURES	16	100%
DRYWALL DISTRIBUTORS INC	16	63%
DICKERSON DISTRIBUTORS INC	16	19%
PETE'S MILK DELIVERY	16	6%
REDDAWAY	16	6%
FIRST CALL PLUS OF WA LLC	15	100%
SAWDUST SUPPLY CO INC	15	20%
PACIFIC PARTY CANOPIES	14	100%
TRI-COUNTY TRUSS INC	14	14%
FALCON CORP	13	100%
CUZ CONCRETE PRODUCTS INC	13	38%
BOISE BUILDING SOLUTIONS DISTRIBUTION LL	13	23%
O'BRIEN CONSTRUCTION INC	12	67%
INTERNATIONAL WOOD PRODUCTS LLC	12	25%
SAN JUAN COUNTY ROAD DEPT	12	17%
FISHERIES SUPPLY CO	12	17%
COASTWIDE LABORATORIES	12	17%
NORTH COAST ELECTRIC CO	12	8%
WS PARKS & RECREATION- NW REG HQ	11	9%
SOUND PUBLISHING INC	10	100%
YOUNG & SON WHOLESALE DIST LTD	10	60%
RELIABLE FLOOR COVERINGS	9	67%
ASSOCIATED BOAT TRANSPORT INC	9	33%
N W SAND & GRAVEL PRODUCTS INC	9	22%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
JANES GYPSUM FLOORS INC	9	22%
SCHWAN'S HOME SERVICE - MUKILTEO	9	11%
CEDAR KING LUMBER CO INC	8	100%
PACIFIC LOGGING INC	8	100%
BONNEVILLE POWER ADMIN	8	13%
STIEBRS FARMS INC	8	13%
A B C SUPPLY CO INC	7	100%
WASHINGTON MARINE CLEANING LLC	7	100%
ISLAND ICE (HEURISTIC ENTERPRISE)	7	57%
LOPEZ READY MIX INC	7	43%
JELD WEN WINDOWS & DOORS	7	43%
THE CHEESEMAN CORP	7	29%
AIRGAS DRY ICE	7	29%
A B C SUPPLY CO INC	7	14%
SHAWN'S QUALITY PRODUCE	7	14%
TIM RYAN CONSTRUCTION INC	6	100%
HANSON BUILDING SUPPLY	6	33%
PACIFIC FOOD IMPORTERS INC	6	33%
THE EVERETT STEEL COMPANIES	6	33%
THE JANES COMPANY INC	5	100%
CRDN OF SEATTLE AND WESTERN WA	5	100%
NICKEL BROS HOUSE MOVING USA	5	100%
KEY CITY FISH COMPANY	5	100%
LOGGERS & CONTRACTORS SUPPLY	5	40%
PURATOS BAKERY SUPPLY	5	40%

*Companies in **bold** responded to the survey in 2014 as well

Company and Fleet Size



Company Name	Fleet Size	% Use WSF
SKYLINE FLOWER GROWERS/SEATTLE	5	40%
INDEPENDENT PET SUPPLY	5	40%
CATTLE POINT ROCK & TOPSOIL LLC	5	20%
SUBURBAN PROPANE LP	4	100%
CASCASDE PACIFIC FLOORING DIST	4	100%
OLYMPIC GLASS & DOOR	3	100%
STORER ENTERPRISES INC DBA AIRPORT & BUR	3	100%
WASHINGTON CULVERT CO	3	100%
BUILDING SPECIALTIES	3	100%
J L BROOKS WELDING INC	3	67%
DIESEL AMERICA WEST	3	67%
KENCO LOGISTIC SERVICES INC	3	67%
ANACORTES LES SCHWAB	3	33%
OLYMPIC DISTRIBUTING CO	3	33%
TIMBERLAND HOMES INC	2	100%
WOODTONE BUILDING PRODUCTS	2	50%
BELCO FOREST PRODUCTS	1	100%
SYNGENTA SEEDS INC	1	100%
STORYVILLE COFFEE CO LLC	1	100%
BUILDING SOURCE INC	1	100%
ISLAND SPRING INC	1	100%
AMERICAN RED CROSS	1	100%
ISLAND CO SENIOR CENTER	1	100%
KIMCO PLUMBING INC	1	100%
ISLAND HARDWARE & SUPPLY	1	100%

*Companies in **bold** responded to the survey in 2014 as well