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 2016 consists of the following main phases:

- **Winter Customer Survey 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 #: 16-6025**
Contents

Methodology .................................................. 4

Executive Summary ........................................ 5

Detailed Study Findings:

• Fleet Profile ............................................. 11
• Ferry Usage ............................................. 16
• Travel Flexibility ....................................... 29
• Wait Times .............................................. 32
• Reservations ............................................ 35
• Potential Congestion Pricing ....................... 44
• Appendix ............................................... 51
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%.
Executive Summary

Fleet Profile*

• Freight customers represent a wide variety of industries; more than a quarter (29%) of freight customers are in Wholesale/Retail, followed by Construction (which jumped from 12% in 2014 to 20% in 2016) and City delivery trucking (6%). Manufacturing dropped from 14% in 2014 to 5% in the current year.

• A majority (53%) of deliveries are made to retail or commercial businesses, followed by residential (33%) and construction sites (28%).

• Just over half of customers (54%) have 1-10 trucks in their fleet and more than a third (40%) have 11 or more.

• The average fleet size is 30 including one outlier fleet of 1,500 trucks and 19 without the outlier. This is down from 2014 where the average fleet size was 47 trucks including UPS’s fleet of 3,500 trucks and 17 trucks without including the UPS fleet.

• On average, just over half (52%) of freight customers’ trucks use Washington State Ferries.

• Of the trucks that use WSF in 2016, 61% are under 40 feet in length and 80% are under 60 feet. Overall truck size has decreased since 2014 when 49% of trucks were 50 feet or longer compared to only 33% in 2016.

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
Executive Summary

Ferry Usage*

• More than half of freight customers (52%) use WSF at least weekly. For those whose trips vary by season, they average 10 spring/summer trips (down from 29 in 2014) compared to 7 fall/winter trips (down from 23 in 2014). Companies whose freight trips are consistent year-round average 15 trips per month in 2016 (down from 18 in 2014).

• Freight trips are skewed towards peak hours, with few freight trips at night. However, since 2014 there has been a significant decrease in peak trips.

• Mukilteo/Clinton is the single most used route (23%), followed by Edmonds/Kingston (19%) and Seattle/Bainbridge (15%).

• The majority of companies say frequency of ferry use has not changed, with a quarter (24%) increasing and 9% (n=9) decreasing frequency. Of the 9 companies whose trips decreased, 3 mentioned changes in delivery schedules and 3 mentioned a loss of customers or less work.

• Most companies (88%) say Washington State Ferries provide a good value. Overall, the perception of WSF as a good value has increased from 2014 to 2016. In addition, the intensity has risen, as more people find it to be a ‘very good value’ and no one finds it to be a ‘very poor value.’

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
Executive Summary

Travel Flexibility*

• Almost half have at least some flexibility when selecting travel time and 32% (down from 40% in 2014) have at least some flexibility when selecting travel day. However, 52% lack flexibility when it comes to time of day and 63% lack flexibility for day of week (up from 54% in 2014).

Wait Times

• Three quarters (75%) 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 1.9 boat wait (down from 2.6 in 2014), although sample sizes are extremely small.

• Overall, wait times are less of an issue now than they were in 2014.

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
Executive Summary

Reservations*

• Most companies (94%) have a business account with WSF. Over four-fifths (83%) are aware of WSF’s vehicle reservation system, which is up from 72% in 2014.

• Of those customers who use the Coupeville/Port Townsend or Anacortes routes, the majority always (70%) utilize the reservation system and 11% use it often. This is a dramatic change from 2014 where only 39% of customers always used the system and 21% used it often. Of those customers who use the reservation system, most are satisfied (89% in 2016 compared to 92% in 2014).

• 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%.

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
Executive Summary

Potential Reservation System*

- 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.

- 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.

- Almost two-thirds (64%) say not charging a no-show fee would make some difference in their likelihood to use the system. This is an increase from the 54% who said it would make a difference in 2014.

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
Executive Summary

Congestion Pricing*

• By a 53% to 17% 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 more opposed to the idea of congestion pricing than in 2014 (53% vs. 44%).

• 42% of customers who travel in peak times (n=74) say they would move trips to off-peak times if they were charged between 1.5 and 3 times the current freight vehicle fare. This is down from 50% in 2014.

• 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.

*Unless otherwise noted, results from 2016 are similar to data collected in 2014
The 2016 average fleet size is 30 including one outlier fleet of 1,500 trucks and 19 without the outlier. Just over half of customers (54%) have 1-10 trucks in their fleet and more than a third (40%) 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, 61% are under 40 feet in length and 80% are under 60 feet.

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 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.

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]
More than a quarter (29%) of freight customers are in Wholesale/Retail, followed by Construction (20%) and City delivery trucking (6%). A majority (53%) of deliveries are made to retail or commercial businesses, followed by residential (33%) and construction sites (28%).

**Business Categories**

- Wholesale/Retail trade: 29%
- Construction: 20%
- City delivery trucking: 6%
- Manufacturing: 5%
- Timber or wood products: 4%
- Distribution: 4%
- Transportation company: 4%
- Long-haul trucking: 3%
- Truck load trucking: 3%
- Logistics, warehousing, (3PL): 3%
- LTL trucking: 2%
- Agribusiness or fishing: 2%
- School/education transport: 2%
- Other: 13%

**Location Delivered to (by types)**

<table>
<thead>
<tr>
<th>Location Delivered to (by types)</th>
<th>Total (Q13)</th>
<th>Most Freight (Q14)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail or commercial businesses</td>
<td>53%</td>
<td>27%</td>
</tr>
<tr>
<td>Residential locations</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Construction sites</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Warehouses</td>
<td>26%</td>
<td>10%</td>
</tr>
<tr>
<td>Some other type of place or location</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>School/educational locations</td>
<td>2%</td>
<td>--</td>
</tr>
<tr>
<td>(DNR: Don’t Know)</td>
<td>3%</td>
<td>10%</td>
</tr>
</tbody>
</table>
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.

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
More than half of freight customers (52%) use WSF at least weekly in 2016. For those whose trips vary by season (35%), they average 10 spring/summer trips compared to 7 fall/winter trips. Companies whose freight trips are consistent year-round average 15 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.
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.

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, but Mukilteo/Clinton is the single most used route.

<table>
<thead>
<tr>
<th>Route</th>
<th>Total Use (Q10)</th>
<th>Most Used (Q11)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edmonds / Kingston</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Mukilteo / Clinton</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Anacortes / San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor</td>
<td>33%</td>
<td>10%</td>
</tr>
<tr>
<td>Seattle / Bainbridge</td>
<td>28%</td>
<td>15%</td>
</tr>
<tr>
<td>Fauntleroy / Vashon</td>
<td>15%</td>
<td>2%</td>
</tr>
<tr>
<td>Coupeville / Port Townsend</td>
<td>15%</td>
<td>2%</td>
</tr>
<tr>
<td>Seattle / Bremerton</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Vashon / Southworth</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Point Defiance / Tahlequah</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Fauntleroy / Southworth</td>
<td>7%</td>
<td>--</td>
</tr>
<tr>
<td>Interisland San Juans Includes Shaw, Orcas, Lopez, and Friday Harbor</td>
<td>7%</td>
<td>--</td>
</tr>
<tr>
<td>Anacortes / Sidney</td>
<td>6%</td>
<td>--</td>
</tr>
<tr>
<td>Don't know/Refused</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Routes used equally</td>
<td>--</td>
<td>19%</td>
</tr>
</tbody>
</table>

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

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

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]
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]?

Freight trips are skewed towards peak hours, with few freight trips at night.
Since 2014 there has been a dramatic decline in 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 – Seasonal 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.

<table>
<thead>
<tr>
<th>Time</th>
<th>October-March</th>
<th>April-September</th>
<th>Consistent Year-round</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak</td>
<td>5.2</td>
<td>8.0</td>
<td>9.7</td>
</tr>
<tr>
<td>Midday</td>
<td>1.5</td>
<td>1.8</td>
<td>3.3</td>
</tr>
<tr>
<td>Night</td>
<td>0.3</td>
<td>0.4</td>
<td>2.3</td>
</tr>
</tbody>
</table>

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]?
The majority of companies say frequency of ferry use has not changed in 2016, with a quarter (24%) increasing and 9% (n=9) decreasing frequency. Of the 9 companies whose trips decreased, 3 mentioned changes in delivery schedules and 3 mentioned a loss of customers or less work.

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?

### 2016 Frequency of Ferry Use

- Increased: 24%
- Not Changed/ DK: 67%
- Decreased: 9%

### Top Reasons for 2016 Decrease

- Loss of customers/less work (n=3)
- Change in delivery schedule/delivering less often (n=3)
Travel behavior has remained consistent from 2014 to 2016.

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?

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

24% 24% 9% 8%

67% 68%

Increased  Not Changed/DK  Decreased
Most companies (88%) 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?

- Very good value: 18%
- Good value: 70%
- Poor value: 7%
- Don’t know: 5%
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...?
Factors Influencing Decision

- Location/destination: 32%
- Timing/traffic/wait time: 25%
- Customer driven/customer request: 16%
- We have a set schedule/always use the same ones: 16%
- Availability of ferries/space/next sailing time: 13%
- Convenience for company: 5%
- Other (Specify): 11%
- None/NA: 2%

Q18. What factors impact your decision most as to which specific ferry sailing to take?
Travel Flexibility
Almost half have at least some flexibility when selecting travel time and 32% have at least some flexibility when selecting travel day.

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...?
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.

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

### Impact of Wait Times

<table>
<thead>
<tr>
<th>Issue</th>
<th>2016</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>A major issue or problem</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>A moderate issue or problem</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>A minor issue or problem</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Not an issue or problem</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Don’t know/Refused</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Routes

<table>
<thead>
<tr>
<th>Routes</th>
<th>% Experiencing long wait times</th>
<th>Avg no. of Boats to wait through</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2016 n=75</td>
<td>2014 n=84</td>
</tr>
<tr>
<td>Anacortes / San Juans</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Edmonds / Kingston</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Mukilteo / Clinton</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Seattle / Bainbridge</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Coupeville / Port Townsend</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Interisland San Juans</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Seattle / Bremerton</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Fauntleroy / Vashon</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Anacortes / Sidney</td>
<td>1%</td>
<td>--</td>
</tr>
<tr>
<td>All routes</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>None</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>12%</td>
<td>19%</td>
</tr>
</tbody>
</table>

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
Most companies (94%) have a business account with WSF. However, 17% are not aware of WSF’s vehicle reservation system in 2016.

Q27. Do you have a business account with Washington State Ferries?
Q28. Are you aware Washington State Ferries offers a vehicle reservation system?
Slightly more respondents have a business account compared to 2014. General awareness of the reservation system has increased as well.

Q27. Do you have a business account with Washington State Ferries?
Q28. Are you aware Washington State Ferries offers a commercial vehicle reservation system?
Of those customers who use the Coupeville/Port Townsend or Anacortes routes (n=37), the majority use the reservation system always (70%) or often (11%). Only 3% never use the system. Of those customers who use the reservation system (n=36), most (89%) say they are satisfied.

**Reservation System Use**
(n=37)
- Always: 70%
- Often: 11%
- Sometimes: 8%
- Rarely: 8%
- Never: 3%
- Don't know: 0%

**Satisfaction with Reservation System**
(n=36)
- Total Satisfaction: 89%
- Very satisfied: 36%
- Satisfied: 53%
- Dissatisfied: 8%
- Very dissatisfied: 3%

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?

Q30. 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 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%.*

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... ?

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

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

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

Use WSF More w/ Reservation System (n=75)

- Increase: 16%
- Stay the same: 63%
- Decrease: 19%
- Don't know/Don't want: 3%
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...?

<table>
<thead>
<tr>
<th>Deposit Percentage</th>
<th>Would Use</th>
<th>Would Not Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% Deposit</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>75% Deposit</td>
<td>39%</td>
<td>58%</td>
</tr>
<tr>
<td>50% Deposit</td>
<td>46%</td>
<td>53%</td>
</tr>
<tr>
<td>25% Deposit</td>
<td>51%</td>
<td>46%</td>
</tr>
</tbody>
</table>
Almost two-thirds (64%) say not charging a no-show fee would make some difference in their likelihood to use the system. This is an increase from 2014 where a little over half (54%) said it would make a difference.

Q38. How much of a difference would it make in your use of a 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…?
Potential Congestion Pricing
By a 53% to 17% 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.
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

About four-in-ten freight customers who travel in peak times (n=74) 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=60) say they lack the flexibility to change the time.

#### Would Move Trips to Off Peak

<table>
<thead>
<tr>
<th>Description</th>
<th>Move Trips</th>
<th>Not Move Any</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.5x Fare (n=74)</td>
<td>34%</td>
<td>66%</td>
</tr>
<tr>
<td>2x Fare (n=74)</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>3x Fare (n=74)</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>1/2 the fare (n=100)</td>
<td>25%</td>
<td>75%</td>
</tr>
</tbody>
</table>

#### Reasons to continue even w/higher fares

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't have a choice/we go by a schedule/work hours</td>
<td>77%</td>
</tr>
<tr>
<td>Customer needs/demands</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

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)
The likelihood of moving trips has decreased slightly since 2014.

Would Move Trips to Off Peak Times

<table>
<thead>
<tr>
<th>Year</th>
<th>1.5x Fare</th>
<th>2x Fare</th>
<th>3x Fare</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 (n=74)</td>
<td>66%</td>
<td>52%</td>
<td>58%</td>
</tr>
<tr>
<td>2014 (n=92)</td>
<td>54%</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>2012</td>
<td>58%</td>
<td>52%</td>
<td>56%</td>
</tr>
</tbody>
</table>

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?
Consistent with the 2014 respondents, 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.

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?
Forty-eight percent (I don’t have any problems, 31%; Don’t Know, 10%; None, 7%) do not mention any specific problem with freight shipping on Washington State Ferries. This has fallen from 55% (I don’t have any problems, 35%; Don’t Know, 12%; None, 8%) since 2014. Among those that do mention an issue, the top concerns center around wait times and space.
## Company and Fleet Size

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

*Companies in **bold** responded to the survey in 2014 as well*
## Company and Fleet Size

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

*Companies in **bold** responded to the survey in 2014 as well*
## Company and Fleet Size

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

*Companies in **bold** responded to the survey in 2014 as well*
## Company and Fleet Size

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

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

Washington State Transportation Commission
Telephone Survey of Freight Shippers - 2016
EMC Research #16-6025
n=100
FINAL

[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 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.
   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
   2. Not right person ➔ May I please speak to the person in your firm whose job responsibility entails some or all 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. NONE/DON’T HAVE OWN FLEET ➔ THANK AND TERMINATE SURVEY
   97. (DNR: Don’t know ➔ CONTINUE TO Q3

3. And how many of those 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 ➔ RECORD ESTIMATE ON NEXT SCREEN)
   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?
   
   [READ LIST]
   1. Daily
   2. Several times a week
   3. At least once a month
   4. At least once a quarter
   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 ✧ ASK Q6 & Q7
   2. No, not different ✧ SKIP TO Q8

6. And, approximately how many one-way crossings are made by your trucks in a typical month from October through March? Please base your answer on a crossing being a one-way trip, so count a round trip as two crossings. [RECORD NUMBER: _______] [Less than once a month=0]
   97. (DNR: Don’t know, but we do use WSF ✧ READ: An estimate is fine. ✧ RECORD ESTIMATE ON NEXT SCREEN)

7. And, approximately how many crossings are made by your trucks in a typical month from April through September? 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: _______] [Less than once a month=0]
   97. (DNR: Don’t know, but we do use WSF ✧ READ: An estimate is fine. ✧ RECORD ESTIMATE ON NEXT SCREEN)

8. 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]
   97. (DNR: Don’t know, but we do use WSF ✧ READ: An estimate is fine. ✧ RECORD ESTIMATE ON NEXT SCREEN)

[RESUME ASKING ALL]

9. 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] [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 59 feet _____ no. of trucks 97. (DNR: Don’t know)
   f) 60 to 69 feet _____ no. of trucks 97. (DNR: Don’t know)
   g) 70 to 79 feet _____ no. of trucks 97. (DNR: Don’t know)
   h) 80 feet or more _____ no. of Trucks 97. (DNR: Don’t know)
10. What ferry routes do you use for moving freight? [READ LIST IF NECESSARY]

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. Inter-island San Juans [san wahns] Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. Vashon [VASH-on] / Southworth
13. (DNR: Don’t know/Refused)

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

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

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. Inter-island San Juans [san wahns] Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. Vashon [VASH-on] / Southworth
13. Routes used equally
14. (DNR: Don’t know/Refused)
Survey Questionnaire (Cont’d)

[RESUME ASKING ALL]

12. Which of the following categories best describes your company’s line of business? [READ LIST]
   1. Long-haul trucking
   2. City delivery trucking
   3. Truck load trucking
   4. L-T-L 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. Other [SPECIFY______]
   97. (DNR: Don’t Know)

13. Using the ferries, which location type do you deliver freight to? [READ LIST] [ACCEPT MULTIPLE SELECTIONS]
   1. Residential locations
   2. Retail or commercial businesses
   3. Warehouses
   4. Construction sites
   5. Some other type of place or location [SPECIFY______]
   97. (DNR: Don’t Know)

[IF MORE THAN ONE LOCATION MENTIONED IN Q13 ASK Q14 FOLLOW-UP]

14. And, which location type do you deliver the most freight to? [REPEAT LIST IF NECESSARY]
   1. Residential locations
   2. Retail or commercial businesses
   3. Warehouses
   4. Construction sites
   5. Some other type of place or location [SPECIFY______]
   97. (DNR: Don’t Know)
Survey Questionnaire (Cont’d)

SCHEDULING

15. [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...? [READ ALOUD]
   a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _______ Record no of trips
   b. MIDDAY [IF NEEDED: generally 9am to 3pm] _______ Record no of trips
   c. NIGHT [IF NEEDED: generally 7pm to 6am] _______ Record no of trips
   [Total = Q6]

16. [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...? [READ ALOUD]
   a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _______ Record no of trips
   b. MIDDAY [IF NEEDED: generally 9am to 3pm] _______ Record no of trips
   c. NIGHT [IF NEEDED: generally 7pm to 6am] _______ Record no of trips
   [Total = Q7]

[IF Q15A>0 OR Q16A>0 THEN PEAK_HOUR_TRIPS=TRUE]

17. [ASK IF Q5 = 2] In a typical month, how many of your [INSERT NUMBER FROM Q8] freight trips are taken during...? [READ ALOUD]
   a. PEAK HOURS generally 6am to 9am and 3pm to 7pm _______ Record no of trips
   b. MIDDAY [IF NEEDED: generally 9am to 3pm] _______ Record no of trips
   c. NIGHT [IF NEEDED: generally 7pm to 6am] _______ Record no of trips
   [Total = Q8]

[IF Q17A>0 THEN PEAK_HOUR_TRIPS = TRUE]

[RESUME ASKING ALL]

18. What factors impact your decision most as to which specific ferry sailing to take? [ACCEPT UP TO 3 RESPONSES]

19. 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 - Conveninece/Frequency of Sailing Mentioned)
   5. (DNR: Neither – Other Mentioned)
   6. (DNR: Don’t Know/Refused)
20. 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
4. Completely inflexible
5. (DNR: Don’t know)

21. 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
4. Completely inflexible
5. (DNR: Don’t know)

22. 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]

PEAK TIME PERIOD TRIPS

23. 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? [READ LIST]

1. A major issue or problem
2. A moderate issue or problem
3. A minor issue or problem
4. Not an issue or problem ➔ SKIP TO Q25
5. (DNR: Don’t know/Refused) ➔ SKIP TO Q26
Survey Questionnaire (Cont’d)

24. 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. Inter-island San Juans [san wahns] Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. Vashon [VASH-on] / Southworth
13. (DNR: All routes)
14. None [SKIT TO Q26]
15. Don’t know [SKIT TO Q26]

[FOR EACH ROUTE MENTIONED IN Q24 ASK Q25 FOLLOW-UP]

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

[DISPLAY ONLY ROUTES MENTIONED IN Q24] Record average no. of boats

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. Inter-island San Juans [san wahns] Includes Shaw, Orcas [OR-cuss], Lopez, and Friday Harbor
11. Vashon [VASH-on] / Southworth
13. (DNR: Don’t know)

26. 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]

WSTC FROG - 2016 WSF Freight Shippers Report
Survey Questionnaire (Cont’d)

RESERVATIONS

27. Do you have a business account with Washington State Ferries?
   1. Yes, have business account
   2. No, business account
   3. (DNR: Maybe / Don’t Know)

28. Are you aware Washington State Ferries offers a vehicle reservation system?
   1. Yes, aware
   2. No, not aware → SKIP TO Q32

[IF Q10 ROUTE EQUALS 8 OR 9 ASK Q29-Q31 OTHERWISE SKIP TO Q32]

29. As you may know, Washington State Ferries offer a vehicle reservation system on Coupeville [COO-p-vill] /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 W-S-F’s vehicle reservation system? Would you say ... [READ LIST?]
   1. Always
   2. Often
   3. Sometimes
   4. Rarely
   5. Never → SKIP TO Q32
   6. (DNR: Don’t Know)

30. All things considered, how satisfied are you with the vehicle reservation system that W-S-F offers?
   1. Very satisfied → SKIP TO Q32
   2. Satisfied → SKIP TO Q32
   3. Neither satisfied nor dissatisfied → SKIP TO Q32
   4. Dissatisfied
   5. Very Dissatisfied
   6. Have never used W-S-F vehicle reservation system → SKIP TO Q32

31. What specifically about your experience with the vehicle reservation system made you dissatisfied? Please be as specific as possible. [ACCEPT UP TO THREE RESPONSES]

31a. What changes, if any, would you suggest? [ACCEPT UP TO THREE RESPONSES]
Survey Questionnaire (Cont’d)

[IF Q10 ROUTE EQUALS 1-7 OR 11 ASK Q32-38 OTHERWISE SKIP TO Q40INT]

32. If all of the Central Puget [PYOO-jet] Sound ferry routes had a reservations system for all vehicles, including commercial vehicles 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 [PYOO-jet] Sound ferries increase, decrease, or remain the same as a result of having a reservation system in place?  [IF ASKED: Central Puget [PYOO-jet] Sound routes are from Mukilteo [muck-il-TEE-o] /Clinton to Point Defiance/Tahlequah [TAL-i-kwah]]

1. Increase
2. Same
3. Decrease
4. (DNR: Don’t know)
5. (DNR: Don’t want reservations on Central Puget Sound routes) ➔ SKIP TO Q40INT
6. (DNR: Already use the reservation system on all the routes we use)
7. (DNR: Don’t do shipping in the Central Puget Sound region)

33INT. The current W-S-F vehicle 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
- 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.

33. How likely would your company be to use this vehicle reservation system knowing you would pay 100% of the fare if your truck wasn’t there on time for boarding? Would you say...? [READ LIST]

1. Definitely would use ➔ SKIP TO Q40INT
2. Would be very likely to use ➔ SKIP TO Q40INT
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)

34. How likely would your company be to use this vehicle reservation system knowing you would pay 75% of the fare if your truck wasn’t there on time for boarding? [REPEAT SCALE IF NEEDED]
   1. Definitely would use \( \Rightarrow \) SKIP TO Q40INT
   2. Would be very likely to use \( \Rightarrow \) SKIP TO Q40INT
   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)

35. How likely would your company be to use the vehicle 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; \( \Rightarrow \) SKIP TO Q40INT
   2. Would be very likely to \( \Rightarrow \) SKIP TO Q40INT
   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)

36. How likely would your company be to use the vehicle 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; \( \Rightarrow \) SKIP TO Q40INT
   2. Would be very likely to \( \Rightarrow \) SKIP TO Q40INT
   3. Would be somewhat likely to \( \Rightarrow \) SKIP TO Q40INT
   4. Would be somewhat unlikely to
   5. Would be very unlikely to
   6. Definitely would not
   7. (DNR: Don’t know)

37. Why would you be unwilling to use a vehicle reservation system that guaranteed you a spot on a specific boat with a 25% no-show charge if your truck wasn’t there on time for boarding? [PROBE AND CLARIFY]

38. How much of a difference would it make in your use of a vehicle reservation system if W-S-F 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 ... [READ LIST]
   1. Big Difference – I would use the vehicle reservation system a lot
   2. Small Difference – I might use it
   3. No Difference – I still wouldn’t use it
CONGESTION PRICING

[RESUME ASKING ALL]

40. INT. The next set of questions are about shipping freight on the ferries during peak travel.

40. 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.

SCALE:
1. Strongly disagree
2.
3.
4.
5. Strongly agree
6. [DNR: Don’t Know]

[IF NEEDED: Peak Travel Periods are defined as:
MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am
MONDAY – FRIDAY - WESTBOUND between 3:00 pm and 7:00 pm
SATURDAY - WESTBOUND between 12:00 and 6:00 pm
SUNDAY - EASTBOUND between 11:00 am and 5:00 pm]

[IF PEAK_HOUR_TRIPS=TRUE, ASK Q41, ELSE SKIP TO Q44]

41. 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 would you move to off-peak times?

% [IF 100% SKIP to Q44]

97. Don’t know ➔ READ: An estimate is fine. ➔ RECORD ESTIMATE ON NEXT SCREEN

42. If freight customers who use the ferry during peak travel periods were charged double the fare currently charged for freight vehicles, what percent of your freight trips would you move to off-peak times?

% [IF 100% SKIP to Q44]

97. Don’t know ➔ READ: An estimate is fine. ➔ RECORD ESTIMATE ON NEXT SCREEN

43. 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 would you move to off-peak times?

% 

97. Don’t know ➔ READ: An estimate is fine. ➔ RECORD ESTIMATE ON NEXT SCREEN
44. 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?
   %

97. Don't know → READ: An estimate is fine. → RECORD ESTIMATE ON NEXT SCREEN

45. [ASK IF Q44 IS <10%] 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? [ACCEPT UP TO THREE RESPONSES]

46. 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?
   1. Yes
   2. No
   3. (DNR: Don't know)

47. 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)

48. 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? [PROBE AND CLARIFY]

49. 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 → SKIP TO Q52
   2. Increased somewhat → SKIP TO Q52
   3. Not changed; → SKIP TO Q52
   4. Decreased somewhat
   5. Decreased significantly
   6. (DNR: Don't know) → SKIP TO Q52
50. What is the primary reason for the decrease? [DO NOT READ – USE CODE LIST BELOW]
   1. (Drive around instead of using the ferry)
   2. (Change in delivery schedule/delivering less often)
   3. (Cost of fare to ride the ferry is too high)
   4. (Ferry travel takes too long)
   5. (Ferry waits are too long)
   6. (Ferries are unreliable)
   7. (Ferry schedule is inconvenient)
   8. (Time between ferry sailings is too long)
   9. (Ferry routes are not in the right location to be useful)
   10. (Other: specify ________________)
   11. (DNR: Don’t know)

51. What other reasons are there? [DO NOT READ – USE CODE LIST BELOW- ACCEPT MULTIPLE] [DO NOT SHOW RESPONSE FROM Q50]
   1. (Drive around instead of using the ferry)
   2. (Change in delivery schedule/delivering less often)
   3. (Cost of fare to ride the ferry is too high)
   4. (Ferry travel takes too long)
   5. (Ferry waits are too long)
   6. (Ferries are unreliable)
   7. (Ferry schedule is inconvenient)
   8. (Time between ferry sailings is too long)
   9. (Ferry routes are not in the right location to be useful)
   10. (Other: specify ________________)
   11. (DNR: Don’t know)

52. 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
   4. A very poor value
   5. (DNR: Don’t know)
53. Other than lowering the price, what else could Washington State Ferries do to help you move freight on the ferries? [ACCEPT TWO RESPONSES]

Thank Respondent for completing the full survey and hang up.

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

96. Do you ever ship to areas on the west side of Puget [PYOO-jet] Sound where you possibly could use the ferry system to transport your freight?
   1. Yes
   2. No → THANK AND TERMINATE

97. 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? [ACCEPT 3 RESPONSES]

98. What is the primary reason for your company NOT using the ferries to transport freight? [DO NOT READ – USE CODE LIST BELOW]
   1. (Driving around instead of using the ferry is easier)
   2. (Our client’s delivery/receiving schedule)
   3. (Cost of fare to ride the ferry is too high)
   4. (Ferry travel takes too long)
   5. (Waits at terminals are too long)
   6. (Ferries are unreliable)
   7. (Ferry schedule is inconvenient)
   8. (Time between ferry sailings is too long)
   9. (Ferry routes are not in the right location to be useful)
   10. (NO/LIMITED shipments going to west side Puget [PYOO-jet] Sound or Island markets)
   11. Other [SPECIFY]
   12. (Don’t know)
99. What other reasons do you have for not using them? [DO NOT READ – USE CODE LIST BELOW] [DO NOT SHOW RESPONSE FROM Q98]
   1. (Driving around instead of using the ferry is easier)
   2. (Our client’s delivery/receiving schedule)
   3. (Cost of fare to ride the ferry is too high)
   4. (Ferry travel takes too long)
   5. (Waits at terminals are too long)
   6. (Ferries are unreliable)
   7. (Ferry schedule is inconvenient)
   8. (Time between ferry sailings is too long)
   9. (Ferry routes are not in the right location to be useful)
  10. (NO/LIMITED shipments going to west side Puget [PYOO-jet] Sound or island markets)
  11. (Other [SPECIFY])
  12. (No other reasons)
  13. (Don’t know/Nothing)

Thank Respondent for completing the ‘Reasons for not using the ferry’ survey questions and hang up.