



*Prepared for:*  
**Washington State  
Transportation Commission**



# **2008 Ferry Customer Survey**

**Technical Paper #8:  
Freight Customer Online Survey**

*Prepared by:*



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# Preface

The 2008 WSF Customer Survey consisted of three research phases culminating in a final analysis and report of Washington State Ferry Customers.

Freight customers or those driving oversize commercial vehicles onto the ferry represent a small but unique segment of WSF riders. To better understand the needs and behaviors of freight customers, ORC conducted an on-line survey with a small group of freight customers, drawn from a list of shippers provided by Washington State Ferries (WSF), that represent the most frequent and regular users of the system.

The purpose of the Freight Customer Survey was to allow freight customers who regularly use the ferry to share their opinions and ideas about determining the best way to utilize existing ferry routes effectively and to help determine the future direction for the ferry system. A total of 25 freight companies that ship goods to the communities served by WSF and who use the ferries completed the survey. This research provides important insights into the unique travel behaviors, attitudes, and needs of this important segment.

This Technical Paper summarizes the key findings from this Freight Customer Survey. Please note that because of the nature of sampling and due to the small sample size, this data cannot be projected to the general freight customers that ride Washington State Ferries (WSF). In all tables / graphs both the number of respondents (n) and the percent of respondents (%) are shown.

# Table of Contents

## Contents

- Preface..... ii
- Table of Contents..... iv
  - Contents* ..... iv
  - List of Tables* ..... vi
- Overall Summary ..... 1
  - Respondent / Fleet Characteristics..... 1
  - Travel Behavior ..... 2
  - Reservation System ..... 2
  - Congestion Pricing ..... 3
- Key Findings – Fleet Characteristics..... 4
  - Summary of Fleet Characteristics*..... 4
  - Fleet Characteristics*..... 5
    - Size of Fleet ..... 5
    - Truck Size ..... 6
    - Ferry Usage and Delivery Purpose..... 7
- Key Findings – Travel Behavior..... 9
  - Summary of Key Findings – Travel Behavior*..... 9
  - Routes Used* ..... 10
  - Travel Times* ..... 11
    - Time of Day / Day of Week Traveled ..... 11
    - Factors Influencing Choice of Travel Times..... 12
    - Flexibility in Choice of Travel Times ..... 13
      - Time of Day Flexibility: ..... 13
      - Day of the Week Flexibility: ..... 13
    - Wait Times ..... 14
      - Wait Time Problem: ..... 14
      - Boat Wait during Peak Time: ..... 14

<i>Change in Frequency of Transporting Freight on Ferries</i> .....	<b>16</b>
<b>Key Findings – Attitudes toward Proposed Operational Strategies</b> .....	<b>17</b>
<b><i>Summary of Key Findings – Attitudes toward Proposed Operational Strategies</i></b> .....	<b>17</b>
Reservations .....	17
Congestion Pricing .....	17
<b><i>Reservations</i></b> .....	<b>18</b>
Attitudes toward Key Aspects of a Reservation System.....	18
Willingness to Pay a Premium for a Guaranteed Space at Specific Boarding Time .....	19
When / Where Should Reservations be Available.....	20
<b><i>Congestion Pricing</i></b> .....	<b>21</b>
<b>Key Findings – Freight Customer Recommendations</b> .....	<b>24</b>
<b><i>Summary of Freight Customer Recommendations</i></b> .....	<b>24</b>
<b><i>Freight Customer Recommendations</i></b> .....	<b>24</b>
<b>Appendix</b> .....	<b>25</b>
<b><i>Methodology</i></b> .....	<b>25</b>
<b><i>Questionnaire</i></b> .....	<b>26</b>
Screening Questionnaire.....	26
On-Line Survey Questionnaire .....	30

## List of Tables

Table 1: Size of Fleet .....	5
Table 2: Size of Fleet That Rides Washington State Ferries .....	5
Table 3: Truck Size .....	6
Table 4: Number of One-Way Crossings by All Trucks in Fleet.....	7
Table 5: Business Line of Company.....	7
Table 6: Type of Delivery Locations .....	8
Table 7: Most Used Freight Route .....	10
Table 8: Other Routes Typically Used.....	10
Table 9: Travel Times .....	11
Table 10: Flexibility for Time of Day .....	13
Table 11: Flexibility for Day of the Week.....	13
Table 12: Extent to Which Wait Times Are a Problem.....	14
Table 13: Average Number of Boats Wait .....	14
Table 14: Change in Frequency of Transporting Freight on the Ferries.....	16
Table 15: Extent of Agreement with Vehicle Reservation System .....	18
Table 16: Willingness to Pay a Premium for a Guaranteed Space at Specific Boarding Time .....	19
Table 17: When / Where Should Reservation System be Available .....	20
Table 18: Attitudes Toward Congestion Pricing.....	21
Table 19: Likelihood of Rescheduling Trips Based on Amount of Premium Charged During Peak Travel Periods .....	22
Table 20: Likelihood of Traveling Between 11:00 p.m. and 3:00 a.m. if Passage is “Free” .....	23

# Overall Summary

Freight customers, or those who schedule oversized commercial vehicles onto the ferry, represent a small but unique segment of WSF riders. WSF provided a list of 53 freight customers for ORC to survey. From that list, 25 freight customers completed both a brief telephone survey followed by a more detailed online survey to provide insights regarding their travel on the ferries and to allow them to share their opinions and ideas.

## Respondent / Fleet Characteristics

A variety of companies completed the survey with fleet sizes ranging from as few as one to two trucks to more than 20 trucks. The freight companies surveyed report that they typically send between 55 and 60 percent of the trucks in their fleet onto the ferries monthly. The trucks sizes these companies drive on range from small commercial vehicles (basically the same size as a full-size pick-up truck or van) to very large tractor / trailer trucks (FHWA Class 10).

- Nearly three out of five (58%) respondents report driving trucks onto the ferries that are between 20 and 30 feet in length – the equivalent of most FHWA Class 5 Vehicles (two-axle, six-tire, single unit trucks) and some Class 6 Vehicles (three-axle single-unit trucks).

Many, however, also report scheduling much larger trucks onto the ferries:

- Over half (51%) reporting driving trucks between 30 and 60 feet in length. This includes FHWA Class 7 (four- or more axle single-unit trucks) through Class 9 (five-axle single-trailer trucks).

Twenty-nine percent (29%) report scheduling trucks onto the ferry that are in excess of 60 feet in length – the equivalent of FHWA Class 10 and above (six- or more axle single-trailer trucks or five or more axle multi-trailer trucks).

On average freight companies surveyed make 40 one-way trips per month – or 20 round trips. This equates to approximately one round trip daily per company per work day.

## Travel Behavior

Most (92%) of the freight companies surveyed report shipping most often on the Anacortes / San Juans route.

- A significant number (24%) of the freight customers surveyed report only shipping on this route. Among those using other routes, the majority report that they also use the “island” routes that have limited or no other access such as the San Juans Interisland, Mukilteo / Clinton (20%), and Fauntleroy / Vashon (16%).

Nearly all (90% or more) freight customers report that their ferry truck trips are taken on weekdays. Freight customers report having little flexibility in scheduling trips – both day and time of trip.

- Many of those surveyed express interest in starting the day early, whether for their own convenience or to avoid congestion later. Others identified time constraints such as business hours or delivery times.
- A few mention the availability of preferential loading or reservations as factors influencing their choice of travel times.

Most (71%) freight customers surveyed report that the amount of time they have to wait for a ferry and/or the number of boats they have to wait through before loading is a major issue.

The majority of freight customers (92%) report either no change or an increase in ferry usage. Most (69%) freight customers surveyed report that the frequency with which they transport freight on the ferries has increased.

## Reservation System

The freight customers surveyed generally disagree with the notion that those with a reservation should pay a premium over the regular fare; nearly half (46%) of the responders “strongly disagrees”.

- Most (65%) freight customers surveyed oppose any premium in fare for a freight reservation which is consistent with their answer to the question about whether there should be a premium.

Freight customers are evenly divided on whether only routes with high freight traffic should have a reservation system – 40 percent agrees and 45 percent disagrees.

On the other hand, the freight customers surveyed have strong opinions about whether the reservation system should only be available during peak travel periods.

- Half of the freight customers surveyed “strongly disagrees” that the reservation system should be available only during peak travel periods while one-third (35%) agrees, suggesting that these freight operators would prefer to make reservations for all trips, thus alleviating any uncertainty and unanticipated costs (of time).

## Congestion Pricing

Most freight customers disagree that a premium fare should be charged for freight travel during peak travel periods – 41 percent “strongly disagrees” and 14 percent “somewhat disagrees.”

On the other hand, they overwhelmingly like the idea of giving a discount for those traveling in off-peak travel periods which is also consistent with their price-consciousness evidenced in previous answers.

- While they are very price conscious, they are even more travel-time conscious. Freight customers surveyed report that they are unlikely to reschedule trips to avoid paying a premium during peak travel periods reflecting the lack of flexibility they report earlier in the survey. Moreover, more than three out of four (77%) freight customers surveyed say they would be unlikely to reschedule their travel during the midnight hours even if travel is free.

# Key Findings – Fleet Characteristics

Questions were asked in the recruiting efforts to understand how representative the sample of freight customers interviewed might be relative to the population of freight customers using Washington State Ferries. An unrepresentative sample of freight customers would be one that has obvious gaps in key fleet characteristics – for example, only very large fleets or only one size of truck is represented. The following tables show the recruiting information collected from the 24 respondents who participated in the telephone recruiting portion of this discussion.

## Summary of Fleet Characteristics

A variety of companies completed the survey with fleet sizes ranging from as few as one to two trucks to more than 20 trucks. The fleet companies surveyed report that they typically send between 55 and 60 percent of the trucks in their fleet onto the ferries. The trucks these companies drive on range in size from small commercial vehicles (basically the same size as a full-size pick-up truck or van) to very large (tractors plus two trailers).

- Nearly three out of five (58%) respondents report driving trucks onto the ferries that are between 20 and 30 feet in length – the equivalent of most FHWA Class 5 Vehicles (Two-Axle, Six-Tire, Single Unit Trucks) and some Class 6 Vehicles (Three-Axle Single Unit Trucks).



*FHWA Class 5 Vehicle (example)*



*FHWA Class 8 Vehicle (example)*

*FHWA Class 10 Vehicle*



- Many, however, also report scheduling much larger trucks onto the ferries.
  - Over half (51%) reporting driving trucks between 30 and 60 feet in length. This includes FHWA Class 7 (Four or More Axle Single Unit Trucks) through Class 9 (Five-Axle Single Trailer Trucks).
  - Twenty-nine percent (29%) report scheduling trucks onto the ferry that are in excess of 60 feet in length – the equivalent of FHWA Class 10 and above (six or more axle single trailer trucks or five or more axle multi-trailer trucks).

On average, freight companies surveyed make 40 one-way trips per month – or 20 round trips. This equates to approximately one round trip per company per workday. Three out of five (58%) freight companies surveyed are in the retail or wholesale trade delivery business. However other industries, including services and utilities and/or construction, are also represented in the survey. While it is not possible to reliably project the results of this study to all freight users, it is possible to say that different types of freight customers are represented in this study.

# Fleet Characteristics

## Size of Fleet

The recruiting efforts produced few companies with small fleets (1 to 2 trucks), but overall there is a good distribution of companies with varying fleet sizes. The median number of trucks belonging to participants is seven; the mean is nearly 19 trucks.

While there are companies with large fleet sizes that participated in the study, the number of trucks that these companies send onto the ferries is considerably less.

- More than half of the companies surveyed send fewer than five trucks to deliver freight via the ferries.
- Only a single company has more than 20 trucks that ride the ferries.
- The average number of trucks by freight customer riding on the ferries is 6.1, and the median is 3.5.
- Freight customers report that between 55 and 60 percent of the trucks in their fleet use Washington State Ferries.

**Table 1: Total Size of Fleet**

	Number of Respondents	% of Respondents
1 to 2 trucks	2	8%
3 to 4 trucks	5	21%
5 to 6 trucks	4	17%
7 to 10 trucks	4	17%
11 to 20 trucks	5	21%
21 or more trucks	4	17%
Mean	18.8	
Median	7.0	

*Recruit Screener Question: Approximately how many trucks are in your fleet?  
Base: All Freight Customers (n=24)*

**Table 2: Size of Fleet that Rides Washington State Ferries**

	Number of Respondents	% of Respondents
1 to 2 trucks	6	25%
3 to 4 trucks	9	38%
5 to 6 trucks	2	8%
7 to 10 trucks	2	8%
11 to 20 trucks	4	17%
21 or more trucks	1	4%
Mean	6.1	
Median	3.5	

*Recruit Screener Question: Approximately how many trucks in your fleet ride on the Washington State Ferries?  
Base: All Freight Customers (n=24)*

## Truck Size

The size of the trucks that drive onto the ferries varies considerably.

- Nearly three out of five (58%) respondents report driving trucks onto the ferries that are between 20 and 30 feet in length – the equivalent of most FHWA Class 5 Vehicles (Two-Axle, Six-Tire, Single Unit Trucks) and some Class 6 Vehicles (Three-Axle Single Unit Trucks).



Many, however, also report scheduling much larger trucks onto the ferries.

- Over half (51%) reporting driving trucks between 30 and 60 feet in length. This includes FHWA Class 7 (Four or More Axle Single Unit Trucks) through Class 9 (Five-Axle Single Trailer Trucks).



- Twenty-nine percent (29%) report scheduling trucks onto the ferry that are in excess of 60 feet in length – the equivalent of FHWA Class 10 and above (six or more axle single trailer trucks or five or more axle multi-trailer trucks).



**Table 3: Truck Size that Rides Washington State Ferries**

	Number of Respondents	% of Respondents	Average Number of Trucks (Mean)
0 – 20 feet	8	33%	0.83
20 – 30 feet	14	58%	1.79
30 – 40 feet	4	17%	0.25
40 – 50 feet	5	21%	0.92
50 – 60 feet	3	13%	0.46
60 – 70 feet	6	25%	1.83
70 – 80 feet	1	4%	0.04
Over 80 feet	0	-	-

*Recruit Screener Question: Thinking only of those trucks that ride the Washington State Ferries, how many are in each of the following size categories?*

*Base: All Freight Customers (n=24)*

*Columns sum to more than n=24 and 100%; multiple responses allowed*

*\*Mean includes All Freight Customers (i.e. includes 0's)*

## Ferry Usage and Delivery Purpose

Freight customers were asked the number of one-way crossings that all trucks in their fleet make in a typical month.

- The average number of crossings reported per freight company surveyed is nearly 40 per month – or 20 round trips.

As can be seen in the chart to the right, the sample represents a wide variety of companies as far as total number of monthly trips.

The majority (58%) of freight companies in the survey are in the retail or wholesale trade delivery business. However other industries, including services and utilities and/or construction, are well represented.

**Table 4: Number of One-Way Crossings by All Trucks in Fleet**

	Number of Respondents	% of Respondents
Less than 15	4	17%
15 to 20	3	13%
21 to 30	5	21%
31 to 40	4	17%
41 to 50	5	21%
51 or More	3	13%
Mean # of Monthly Trips		39.6

*Recruit Screener Question: In a typical month, how many one-way crossings do all the trucks in your fleet make?*

*Base: All Freight Customers (n=24)*

**Table 5: Business Line of Company**

	Number of Respondents	% of Respondents
Retail or Wholesale Trade Delivery	14	58%
Utilities or Construction	4	17%
All Services	4	17%
For Hire Trucking	1	4%
Mail or Parcel Pickup and Delivery	1	4%

*Recruit Screener Question: Which of the following categories best describes the business line your company is in?*

*Base: All Freight Customers (n=24)*

Finally, the freight customers surveyed were asked to list the types of places / locations where they delivered freight.

- Seventy-one percent (71%) of those surveyed report that they deliver to retail or commercial establishments.
- Over forty percent (40%) of respondents also deliver to construction sites and to residential locations.

**Table 6: Type of Delivery Locations**

	Number of Respondents	% of Respondents
Retail or commercial businesses	17	71%
Construction sites	11	46%
Residential locations	10	42%
Warehouses	3	13%
Other	0	0%

*Recruit Screener Question: What types of places / locations are you delivering your freight to?*

*Base: All Freight Customers (n=24)*

# Key Findings – Travel Behavior

The following results are from the online survey completed by 25 freight customers. Twenty-three respondents completed the entire online survey and two additional respondents partially completed the survey. The base sizes for the following tables include both the complete and partially completed surveys. The base size for all Freight Customers does not include respondents who chose not to answer a particular question as part of the base.

## Summary of Key Findings – Travel Behavior

Most (92%) of the freight companies surveyed report that Anacortes / San Juans is the route they ship on most often.

- A large number (24%) only ship on this route. Among those using other routes, the majority report that they also use “island” routes that have limited or no other access such as the San Juans Interisland, but also include Mukilteo / Clinton (20%) and Fauntleroy / Vashon (16%).

Nearly all (90% or more) freight customers report that trips are taken on weekdays. Freight customers report having little flexibility in scheduling trips – both day and time of trip.

- Many of those surveyed express interest in starting the day early, whether for their own convenience or to avoid congestion later. Others identified time constraints such as business hours or delivery times.
- A few mention the availability of preferential loading or reservations as factors influencing their choice of travel times.

Most (71%) freight customers surveyed report that the amount of time they have to wait for a ferry and/or the number of boats they have to wait through before loading is a major issue.

The majority of freight customers (92%) report either no change or an increase in ferry usage. Most (69%) freight customers surveyed report that the frequency with which they transport freight on the ferries has increased.

## Routes Used

Freight companies were asked what route they used most often for moving freight and then to identify all the other routes that they use to move freight using the ferries.

The overwhelming majority of the freight customer surveyed names the Anacortes / San Juans as the route they used most often.

- The Guemes ferry and use of multiple routes account for the other mentions for most often used route.

Twenty-four percent (24%) of the freight companies surveyed report that they ship freight only on the Anacortes / San Juans.

- Among those using other routes, the majority report that they also use “island” routes that have limited or no other access such as the San Juans Interisland but also include Mukilteo / Clinton (20%) and Fauntleroy / Vashon (16%).

Note that the two companies that specified routes other than Anacortes / San Juans as their most used route selected the Anacortes / San Juans as their “other” routes typically used.

**Table 7: Most Used Freight Route**

	Number of Respondents	% of Respondents
Anacortes / San Juans	23	92%
Other	2	8%

Question: What route do you use most often for moving freight?

Base: All Freight Customers (n=25)

**Table 8: Other Routes Typically Used**

	Number of Respondents	% of Respondents
No Other Routes	6	24%
San Juans Interisland	15	60%
Mukilteo / Clinton	5	20%
Fauntleroy / Vashon	4	16%
Seattle / Bainbridge	2	8%
Edmonds / Kingston	2	8%
Keystone / Port Townsend	2	8%
Anacortes / San Juans	2	8%

Question: What other routes do you typically use for moving freight? (Multiple response)

Base: All Freight Customers (n=25)

\*Multiple Response - May add to more than 100%.

# Travel Times

## Time of Day / Day of Week Traveled

For each route that they use, freight carriers were asked to categorize the number of trips taken within specified travel periods. The purpose of this question was to determine how often carriers take ferry trips during peak and off-peak travel periods. Note that the San Juans routes were combined into a single question.

Nearly all (90% or more) freight trips are taken on weekdays.

- Freight customers report a relatively high number of monthly trips (22.4) on the San Juans route which is consistent with their reported used of the San Juans as the most frequently traveled route. Nearly all (20.4) trips are weekday trips; these trips are almost equally divided between peak (11.1) and off-peak (10.3) travel times.
- Those reporting trips on the Mukilteo / Clinton ferry report a relatively high (24.4) number of trips per month on this route. Again, nearly all (22.8) are made during the week. Freight customers scheduling trips on this route report that more trips are made during off-peak times (15.0) than peak times (7.8).
- Freight customers who report scheduling freight onto the Fauntleroy / Vashon ferry schedule relatively few (8.8) trips per month. Again, nearly all (8.0) are during the week. Like Mukilteo / Clinton, freight customers on this route report that more trips are scheduled during off-peak times (5.0) than peak times (3.0).

**Table 9: Travel Times**

	San Juans (n=25)	Mukilteo / Clinton (n=5)	Fauntleroy / Vashon (n=4)	Seattle / Bainbridge (n=2)	Edmonds / Kingston (n=2)	Keystone / Pt. Townsend (n=2)
<b>Weekday – Mean Number of One-Way Trips / Month</b>						
Westbound Peak PM	4.3	7.0	1.0	3.0	4.0	0.0
Eastbound Peak AM	6.8	0.8	2.0	3.0	6.0	0.0
Eastbound any other times	4.5	9.2	2.0	1.0	0.0	0.5
Westbound any other times	4.8	5.8	3.0	0.0	0.0	2.5
<b>Total Weekday Trips</b>	<b>20.4</b>	<b>22.8</b>	<b>8.0</b>	<b>7.0</b>	<b>10.0</b>	<b>3.0</b>
<b>Weekend – Mean Number of One-Way Trips / Month</b>						
Saturday Westbound Peak	0.8	0.6	0.0	0.5	0.0	0.0
Sunday Eastbound Peak	0.3	0.2	0.3	0.5	0.0	0.0
Saturday any other times	0.7	0.6	0.3	1.5	0.0	0.0
Sunday any other times	0.2	0.2	0.3	0.0	0.0	0.0
<b>Total Weekend Trips</b>	<b>2.0</b>	<b>1.6</b>	<b>0.9</b>	<b>2.5</b>	<b>0.0</b>	<b>0.0</b>
<b>TOTAL TRIPS</b>	<b>22.4</b>	<b>24.4</b>	<b>8.8</b>	<b>9.5</b>	<b>10.0</b>	<b>3.0</b>

Question: In a typical month, how many of your freight trips between {INSERT ROUTE} are taken during each of the following travel periods?

Base: All Freight Customers (n=25)

## Factors Influencing Choice of Travel Times

Freight carriers were then asked, “What factors influence your decision as to which specific ferry sailings to take?”

The reasons given vary widely and should be interpreted from the perspective that the majority of their sailings are on the San Juan route.

- Many of those surveyed express interest in starting the day early, whether for their own convenience or to avoid congestion later. Others identified time constraints such as business hours or delivery times.
- A few mention availability of preferential loading or reservations as factors influencing their choice of travel times.

*“Operational hours of the businesses that we pickup freight from. Maximize our working time to minimize our labor cost for down time waiting and riding the ferry.”*

*“Scheduled deliveries to those areas.”*

*“When our Accounts are open. Our office hours. Least amount of Island traffic such as tourists. The earlier the better.”*

*“The timing between ferries to accommodate the workload. Ease of catching the boat, like my Island-only boat. Boats in the daytime when businesses are open to pick up freight from. I do have reservations on about half of the sailings I make.”*

## Flexibility in Choice of Travel Times

Two questions were asked of freight carriers to determine the amount of flexibility they have in scheduling their ferry trips

### ***Time of Day Flexibility:***

The vast majority of carriers surveyed say they have little to no flexibility in their choice of when to travel / schedule travel on the ferries.

- Note that none of the freight customers surveyed say they are completely flexible about the time of day they could schedule their trips.

**Table 10: Flexibility for Time of Day**

	Number of Respondents	% of Respondents
Completely flexible	0	0%
Somewhat flexible	3	13%
Neither	0	0%
Somewhat inflexible	11	46%
Completely inflexible	10	42%
Mean*	1.83	

Question: What degree of flexibility do you have in travel on the ferry in terms of the **time of day** you schedule your drivers?

Base: All Freight Customers (n=24). "Prefer not to answer" excluded from analyses.

\*Mean based on a 5-point scale where "1" means "completely inflexible" and "5" means "completely flexible".

Freight operators were asked to name the factors that affect their flexibility in terms of time of day and/or day of the week they schedule freight trips on the ferries.

Most freight operators say that their customers' schedules are the driving force behind their lack of flexibility

### ***Day of the Week Flexibility:***

When asked about their flexibility in terms of the day of the week they schedule their drivers, freight customers surveyed are even less flexible regarding the day of the week they schedule their drivers.

- Most (92%) freight customers surveyed have little flexibility scheduling day of the week they can travel / schedule travel on the ferries. Seventy-one percent (71%) are "completely inflexible."

**Table 11: Flexibility for Day of the Week**

	Number of Respondents	% of Respondents
Completely flexible	0	0%
Somewhat flexible	2	8%
Neither	0	0%
Somewhat inflexible	5	21%
Completely inflexible	17	71%
Mean*	1.46	

Question: What degree of flexibility do you have in travel on the ferry in terms of the **day of the week** you schedule your drivers?

Base: All Freight Customers (n=24). "Prefer not to answer" excluded from analyses.

\*Mean based on a 5-point scale where "1" means "completely inflexible" and "5" means "completely flexible".

*"Usually the job schedule is the biggest factor."*

*"Scheduled deliveries to those areas." "I am somewhat not flexible as I need to pick up freight in the morning when businesses are open and return to my island and deliver before businesses close. I try and use the island-only ferries (during the daytime hours) as much as possible."*

*"The customers on the Islands, both San Juan and Whidbey, dictate what days we utilize the ferry system. We consolidate all deliveries to the islands to all go on the same days of the week."*

## Wait Times

The survey asked about the problem of wait time for freight customers and commercial vehicle drivers to determine how freight customers perceive their wait time or for how many boats they must wait through before they can drive on. Those freight customers that traveled during peak times were asked the average number of boats they had to wait through during those peak travel periods.

### **Wait Time Problem:**

Most (71%) freight customers surveyed report that the amount of time they have to wait for a ferry and/or the number of boats they have to wait through before loading is a major issue.

- Seventeen percent (17%) report that it is a “minor issue” and 13 percent say it is “no problem at all.”

**Table 12: Extent to Which Wait Times Are a Problem**

	Number of Respondents	% of Respondents
A major issue / problem	17	71%
A minor issue / problem	4	17%
Not an issue / problem	3	13%

Question: How big of an issue or problem would you say the wait time is for you or your drivers?

Base: All Freight Customers (n=24)

"Prefer not to answer" excluded from analysis.

### **Boat Wait during Peak Time:**

According to the information reported previously, most respondents (n=21) do travel at least some of the time during peak weekday travel periods. However, when asked about how many boats they typically have to wait through, just over one half of the respondents (n=13) chose or were able to respond to this question.

- Of the 13 respondents who answered this question, nearly half (six respondents) report that they typically do not have to wait through any boats during peak travel periods. The next largest group (4 respondents) report that they typically wait through only one boat.

**Table 13: Average Number of Boats Wait**

	Number of Respondents	% of Respondents
0 boats	6	46%
1.0 boat	4	31%
1.5 boats	1	8%
2.0 boats	1	8%
3.0 boats	1	8%
Mean	0.81	

Question: Currently, what is the **average number of boats** you or your drivers have to wait through during these peak travel periods (when passenger vehicle demand is high)?

Base: Freight Customers Who Travel During Peak Time Periods in a Typical Month in Q2a-j (n=21)

"Prefer not to answer" excluded from analysis.

Respondents were asked to name the strategies they used to minimize the number of boats they or their drivers might have to wait through.

- Most of the freight customers surveyed mention using the reservation system if they are able.
- Others say they arrive early or take the early ferries in order to avoid waiting through boats.

*“Reservations. Try to travel in non-peak times. Avoid weekends and Fridays if possible.”*

*“We always use the commercial-preferred loading.”*

*“Reservations and trying to arrive early.”*

*“Leave (an) hour (and a) half earlier going eastbound (with no priority) which is one day a week right now. Being in line (an) hour to(an) hour (and a) half early going westbound which cuts into or service time.”*

## Change in Frequency of Transporting Freight on Ferries

Freight customers were asked how much, if any, the frequency with which they transported freight via the ferries has changed since they began using the ferries.

The majority of freight customers (92%) report either no change or an increase in ferry usage. Most (69%) of the freight customers surveyed report that the frequency with which they transport freight on the ferries has increased.

- The two customers who report a decrease in usage were asked to select primary reasons for that change. The reasons given include:
  - 1) Cost of the fare to ride the ferry is too high;
  - 2) Ferry schedule is inconvenient; and
  - 3) Time between ferry sailings is too long.

Another respondent gave a specific alternative to riding the ferries that they had been using.

**Table 14: Change in Frequency of Transporting Freight on the Ferries**

	Number of Respondents	% of Respondents
Increased Significantly	4	17%
Increased Somewhat	12	52%
No Change	5	22%
Decreased Somewhat	1	4%
Decreased Significantly	1	4%
Mean*		3.7

Q19: Since you / your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries. . . ?

Base: All Freight Customers (n=23); "prefer not to answer" excluded from analysis.

\*Mean based on a 5-point scale where "1" means "decreased significantly" and "5" means "increased significantly;" "3" is the mid-point.

# Key Findings – Attitudes toward Proposed Operational Strategies

## Summary of Key Findings – Attitudes toward Proposed Operational Strategies

### Reservations

The freight customers surveyed generally disagree with the notion that those with a reservation should pay a premium over the regular fare; nearly half (46%) of the freight customers surveyed “strongly disagree.”

- Consistent with this disagreement, most (65%) freight customers surveyed oppose any premium in fare for a freight reservation which is consistent with their answer to the question about whether there should be a premium.

Freight customers are evenly divided on whether only routes with high freight traffic should have a reservation system – 40 percent agree and 45 percent disagree.

On the other hand, the freight customers surveyed have strong opinions about whether the reservation system should be available only during peak travel periods.

- Half of the freight customers surveyed “strongly disagrees” that the reservation system should be available only during peak travel periods while one-third (35%) agrees – suggesting that these freight operators would prefer to make reservations for all trips, thus alleviating any uncertainty and unanticipated costs (of time).

### Congestion Pricing

Most freight customers disagree that a premium fare should be charged for freight travel during peak travel periods – 41 percent “strongly disagrees” and 14 percent “somewhat disagrees.”

On the other hand, customers overwhelmingly like the idea of giving a discount for those traveling in off-peak travel periods which is also consistent with their price-consciousness evidenced in previous answers.

- While they are very price conscious, they are even more travel-time conscious. Freight customers surveyed report that they are unlikely to reschedule trips to avoid paying a premium during peak travel periods reflecting the lack of flexibility they reported earlier in the survey. Moreover, more than three out of four (77%) freight customers surveyed say they would be unlikely to reschedule their travel into the midnight hours even if travel is free.

# Reservations

## Attitudes toward Key Aspects of a Reservation System

Attributes of a vehicle reservation system were described to ferry freight customers and they were asked to gauge the extent to which they agree or disagree with the system described. As most of the freight customers are users of the current freight reservation system, they are generally well-informed about how a reservation system works and as such have strong opinions on the proposed changes.

- The freight customers surveyed generally disagree with the notion that those with a reservation should pay a premium over the regular fare; nearly half (46%) of the freight customers surveyed “strongly disagree.”
- The freight customers surveyed are fairly evenly split on releasing reservations for those not arriving in a timely manner. Slightly more “strongly agree” (27%) than “strongly disagree” (23%), but more respondents reported they “somewhat disagree” (18%) than “somewhat agree” (14%).
- Survey respondents were equally split on whether they had no opinion (41%) on whether they agree or disagree with reserving some space one month ahead of travel and some space a day ahead or whether they agreed with the concept (41%). The balance (18%) disagrees with the reservation system allotment.
- Finally, the freight customer surveyed “strongly agree” that the reservation system should be designed so that it can inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open on a “first come, first serve” basis. A minority (24%) of those surveyed neither agrees nor disagrees with the statement.

**Table 15: Extent of Agreement with Vehicle Reservation System**

	Pay a Premium Fare for a Reserved / Guaranteed Space	Forfeit Reserved Space / Payment if Do Not Arrive on Time	Some Space Available At Varying Times	System Should be Able to Inform Customers How Much Capacity Is Reserved
Strongly Agree	9% (n=2)	27% (n=6)	18% (n=4)	48% (n=10)
Agree	9% (n=2)	14% (n=3)	23% (n=5)	10% (n=2)
Neither	14% (n=3)	18% (n=4)	41% (n=9)	24% (n=5)
Disagree	23% (n=5)	18% (n=4)	9% (n=2)	10% (n=2)
Strongly Disagree	46% (n=10)	23% (n=5)	9% (n=2)	10% (n=2)
Mean*	2.1	3.0	3.3	3.8

Q12: To what extent do you agree or disagree with each of the following statements about a Reservation System?

Base: All Freight Customers (n=24); “prefer not to answer” excluded from analysis.

\*Mean based on 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Willingness to Pay a Premium for a Guaranteed Space at Specific Boarding Time

As a follow-up, freight customers were asked their willingness to pay for a guaranteed space on the ferry at a specific boarding time.

Most freight customers surveyed oppose any premium in fare for a freight reservation which is consistent with their answer to the question about whether there should be a premium. In that question, 46 percent disagreed that there should be a premium charged for a reservation.

- Two out of three freight customers surveyed are unwilling to pay any premium. Three respondents shifted their willingness to pay a premium at the 50 percent fare increase point from somewhat willing to somewhat unwilling.
- Even those willing to pay a 10 or 25 percent premium indicate that they are just “somewhat willing” to pay this level of premium. Only one respondent suggested they would be very willing to pay a premium up to 50 percent of the current fare.

**Table 16: Willingness to Pay a Premium for a Guaranteed Space at Specific Boarding Time**

Willingness to Pay . . .	10% Premium	25% Premium	50% Premium	75% Premium	100% Premium
Net Unwilling	65% (n=15)	65% (n=15)	78% (n=18)	96% (n=22)	96% (n=22)
Net Willing	35% (n=8)	35% (n=8)	22% (n=5)	4% (n=1)	4% (n=1)
Mean	2.1	2.1	1.8	1.3	1.3

Q13a-e: How willing would your company be to pay a premium that is [ ] percent greater than the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

Base: All Freight Customers (n=24); “prefer not to answer” excluded from analysis.

\*Mean based on a 5-point scale where “1” means “very unwilling” and “5” means “very willing” to pay premium amount; “3” is the mid-point.

The eight respondents who were unwilling to pay even a 10 percent premium were asked why they are unwilling to use the proposed freight reservation system. These respondents generally feel that they already pay enough for the current reservation system and do not see a need for paying additional fees.

“We already pay a premium price to come across on the ferries as a commercial traveler.”

“I am happy with the current reservation system you have already.”

“When (I) forfeit my payment (it) is bad if I miss the boat. I cannot afford to forfeit a ferry fare of more than \$100. The forfeit part of the proposed system stinks. Freight trucks pay between \$100 - \$250 per fare in the San Juan Islands. Who could agree to forfeit that. I can’t.”

## When / Where Should Reservations be Available

Finally, freight customers were asked to the extent that they agree or disagree with two additional statements describing a reservation system.

First, they were asked if they thought that only routes and/or sailings with high freight traffic should have a reservation system.

- The responses are fairly evenly divided between those agreeing (40%) and those disagreeing (45%).

On the other hand, the freight customers surveyed have strong opinions about whether the reservation system should only be available during peak travel periods.

- Half (50%) of the freight customers surveyed “strongly disagrees” with the statement while one-third (35%) agrees. This would suggest that these freight operators would prefer to make reservations for all trips, thus alleviating any uncertainty and unanticipated costs (of time).

**Table 17: When / Where Should Reservation System be Available**

	Only Routes / Sailings with High Freight Traffic Should Have a Reservation System	System Should Be Available Only During Peak Travel Periods
Strongly Agree	20% (n=4)	25% (n=5)
Agree	20% (n=4)	10% (n=2)
Neither	15% (n=3)	15% (n=3)
Disagree	20% (n=4)	-
Strongly Disagree	25% (n=5)	50% (n=10)
Mean	2.9	2.6

Q13g: To what extent do you agree or disagree with each of the following statements about a Reservation System?

Base: All Freight Customers (n=23); “prefer not to answer” excluded from analysis.

Mean based on a 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.

## Congestion Pricing

Freight customers were asked the extent to which they agree or disagree with two statements about congestion pricing – whether to charge a premium fare for freight travel during peak travel periods and/or whether to give a discount for those who schedule travel during off-peak travel periods.

When asked about whether a premium fare should be charged for freight travel during peak travel periods, most freight customers surveyed disagree.

- Forty-one percent (41%) “strongly disagrees” and 14 percent “somewhat disagrees.”
- This response is almost identical to the General Market Area Survey (Chapter 4) (non-freight customers) which found that 45 percent of Puget Sound residents “strongly disagrees” and 13 percent “somewhat disagrees” with this proposal.

The freight customers surveyed overwhelmingly like the idea of giving a discount for those traveling in off-peak travel periods which is also consistent with their price-consciousness evidenced in previous answers.

- Forty-one percent (41%) “strongly agrees” and 18 percent “somewhat agrees” that freight customers traveling during off-peak periods should receive a discount.
- The freight customers surveyed generally feel more strongly about this proposal than do the general ferry customers surveyed on-board the ferries. In comparison to freight customers (41% strongly and 18% somewhat) agreement, 22 percent of winter ferry riders “strongly agree” with the off peak discounts for riders proposal and an additional 22 percent “somewhat agree.”

**Table 18: Attitudes Toward Congestion Pricing**

	Premium Fare Charged for Freight Travel During Peak Travel Periods	Freight Customers Traveling During Off-Peak Periods Should Receive a Discount
Strongly Agree	9% (n=2)	41% (n=9)
Agree	18% (n=4)	18% (n=4)
Neither	18% (n=4)	9% (n=2)
Disagree	14% (n=3)	14% (n=3)
Strongly Disagree	41% (n=9)	18% (n=4)
Mean	2.4	3.5

*Question:* To what extent do you agree or disagree with each of the following statements?

*Base:* All Freight Customers (n=23); “prefer not to answer” excluded from analysis.

*Mean based on a 5-point scale where “1” means “strongly disagrees” and “5” means “strongly agrees;” “3” is the mid-point.*

To determine the ability of fare pricing to influence peak travel behavior, freight customers were asked two questions about their likelihood of rescheduling freight trips based on fare prices. The first question asked freight customers to indicate their likelihood of rescheduling trips to other times to avoid paying a premium – five premium amounts were given ranging from 10 percent more than current fares to double the current fare.

Although the freight customers surveyed claim to be very price conscious, they are even more travel-time conscious.

- Freight customers surveyed report that they are unlikely to reschedule trips to avoid paying a premium during peak travel periods reflecting the lack of flexibility they report earlier in the survey.

**Table 19: Likelihood of Rescheduling Trips Based on Amount of Premium Charged During Peak Travel Periods**

	Premium over Current Fare				
	10%	25%	50%	75%	100%
Unlikely to Reschedule Trips	65% (n=12)	70% (n=14)	71% (n=15)	75% (n=15)	76% (n=16)
Likely to Reschedule Trips	24% (n=5)	20% (n=4)	19% (n=4)	20% (n=4)	19% (n=4)
Mean	2.2	2.0	2.0	2.0	2.0

*Question: Imagine WSF were to implement a system where freight customers who use the ferry during peak travel periods had to pay a premium that is [] percent greater than the fare currently charged for freight vehicles. How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods*

*Base: All Freight Customers (n=23); "prefer not to answer" excluded from analysis.*

*\*Mean based on a 5-point scale where "1" means "very unlikely" and "5" means "very likely;" "3" is the mid-point.*

A follow-up question was asked of freight customers about their likelihood of rescheduling travel if they could travel for “free” between 11:00 p.m. and 3:00 a.m.

Most telling is freight customers’ “inflexibility” in regards to the time they can or are willing to travel is their answer to the free freight sailing scenario.

- More than three out of four (77%) freight customers surveyed say they would be unlikely to reschedule their travel into the midnight hours even if travel is free. Most (68%) indicate they are “very unlikely” to reschedule their travel.
- Less than 20 percent of the freight customers surveyed is likely to change their travel behavior – similar to the percentage of those responding to the previous question and who say they are likely to reschedule their trips based on a doubled fare increase.

**Table 20: Likelihood of Traveling Between 11:00 p.m. and 3:00 a.m. if Passage is “Free”**

	Number of Respondents	% of Respondents
Unlikely	17	77%
Likely	4	19%
Neither Likely nor Unlikely	1	5%
Mean		1.9

*Question: If WSF offered free passage for freight customers on sailings between 11:00 p.m. and 3:00 a.m. each day, how likely would you be to schedule your freight travel between those time periods?*

*Base: All Freight Customers (n=23); “prefer not to answer” excluded from analysis.*

*\*Mean based on a 5-point scale where “1” means “very unlikely” and “5” means “very likely;” “3” is the mid-point.*

# Key Findings – Freight Customer Recommendations

## Summary of Freight Customer Recommendations

Freight customers feel they should be given priority over other ferry customers and specifically identified tourists as a problem similar to the opinions expressed by the general public regular / frequent riders in the residential focus groups. Their suggestions for improvement focused primarily on improved scheduling and perhaps ferries designed specifically for freight.

## Freight Customer Recommendations

As a wrap-up to the survey, respondents were given the opportunity to indicate what they feel are the primary issues or problems facing the ferry system with regard to its ability to transport freight customers and to help them serve their customers.

*“Availability of space for freight vehicles and the times available. I believe that commercial vehicles should be able to get reservations easier and they should have a higher priority than passenger vehicles. The reason is because we have a guaranteed spot every week unlike the occasional visitor. Maybe some sort of pass or lane for frequent users of the ferries.”*

*“Freight has the most restrictions on it as to doing business. Times they can be open and operate and also when other companies are open; it is very unfair to charge them extra when most of the time they are not in control of the business they do.”*

*“Enough available boat times, enough room on each boat with the tourists to the islands. There are quite a few camping trailers, 5th wheels etc., during peak season.”*

In addition, they were asked to provide suggestions to WSF to improve their services to help freight operators move freight on the ferries. Seventeen respondents submitted ideas.

*“Add more runs during peak usage times. Reduce the amount of time spent attempting to get ferry priorities for the San Juan. Update your priority system; current process is out of date with the technologies that are available. Too many service failures, meaning that the ferry system is old and is continuing to be troubled with maintenance issues. We are willing to pay the price for service but it has to get better than it is today.*

*“A ferry just for freight on the most popular freight runs especially in the San Juans.”*

*“1. Better daytime schedule 2. To fix the confusion that takes place in Anacortes from before the ticket booth-through the purchasing process-and then in the proper lane for the Island destination 3. For preferential-loading customers they cannot communicate with the toll booth when they are in line up and around the corner where the toll booth people cannot see them.”*

*“We need a later ferry than the 2:30 pm in the summer months (3:30 pm to 4:30 pm) going from Anacortes to the Islands.”*

# Appendix

## Methodology

Opinion Research Corporation conducted an online survey with a select sample of Washington State Ferry freight customers as part of the overall 2008 Ferry Customer Survey effort. To conduct this survey, Washington State Ferries supplied Opinion Research Northwest with a list of 51 freight customers to recruit to participate in the survey plus two freight customer contacted during the on-board survey. For statistical purposes, this should be considered a convenience sample and results cannot be projected to the total population of WSF freight customers. However, like the qualitative consumer focus groups, it does provide insights into this important market segment.

The following outlines the process for surveying the freight customers on this list:

1. Freight customers were contacted and recruited by phone to participate in an on-line survey. In order to qualify for the survey, participants must have had one or more trucks in their fleet that ride on Washington State Ferries and have been the person responsible for scheduling their company's freight trips. Twenty-nine freight customers agreed to participate.
2. Those who agreed to complete the survey were sent an e-mail with a link to the survey and a user name and password. To maximize response rates, two reminder emails were sent to those who did not complete the survey, followed by several telephone reminders. At the conclusion of the study on August 8, 2008, a total of 23 of the 29 recruited freight customers had completed the entire survey. An additional two customers partially completed the survey and their results are included where appropriate.

Online respondents were asked a mix of quantitative and qualitative questions, including: route(s) used most often and the number of freight trips taken on those routes during specified time periods for each route used; their flexibility for scheduling; and their attitudes toward proposed operational strategies related to a reservation system and congestion pricing. Freight customers were also afforded the opportunity to provide opinions about their ferry travel experience and provide suggestions for improvement to Washington State Ferries regarding freight movement on the ferries. Selected responses to these qualitative, open-ended questions are provided to illustrate key findings. As in the qualitative research, these direct quotes from respondents are offset in italics and highlighted by a bar.

# Questionnaire

## Screening Questionnaire

### INTRODUCTION

My name is **[NAME]**, from Opinion Research Northwest and on behalf of the Washington State Ferries. We are conducting a very brief research study with freight customers who regularly use the ferry to help determine the future direction for the ferry system. Let me assure you this is not a sales call, the study is being conducted for research purposes only. I have just a couple of questions to determine your qualifications, and it'll take only a few minutes of your time. Your opinions are very important to us, and everything you say will be kept strictly confidential. This call may be monitored and/or recorded to ensure quality. For the purposes of this study may I please speak to **[CONTACT]**?

[READ ONLY IF NECESSARY: What we are doing is recruiting participants to complete an on-line survey. The purpose of this research is to allow freight customers to share their opinions and ideas about determining the best way to utilize existing Ferry routes effectively. The on-line survey will take approximately 10-15 minutes. An email notification will be sent out this week and the survey links will be sent out over the next couple of weeks. You can access the on-line survey at your convenience during the week of July 21 – 27. All I would need to do is ask you a few questions to see what category you would fall under for this study and this would only take a few minutes.]

Q1 Are you the person in your company who is responsible for scheduling freight trips?

- 1 YES **[CONTINUE]**
- 2 NO **[Get person in firm who does that]**

May I please speak to the person in your firm whose job responsibility entails some or all scheduling freight trips?

- 9 REFUSED **[TERMINATE]**

Q2 Approximately how many trucks are in your fleet?

- \_\_\_\_\_ **[ENTER NUMBER]**
- 8 DON'T KNOW
- 9 REFUSED

Q3 Approximately how many trucks in your fleet ride on the Washington State Ferries?

- \_\_\_\_\_ **[ENTER NUMBER] [IF 0 SKIP TO THANK1]**
- 8 DON'T KNOW **[THANK 1]**
- 9 REFUSED **[THANK1]**

THANK1 Thank you for your time. However, we are only looking for freight customers that currently use the Washington State Ferries.

Q4 Thinking only of those trucks that ride the Washington State Ferries, how many are in each of the following size categories?

**[READ LIST AND WRITE IN NUMBER]**

**[PROGRAMMER NOTE: TOTAL SHOULD EQUAL Q3]**

\_\_\_\_\_ 0 – 20 feet

\_\_\_\_\_ 20 – 30 feet

\_\_\_\_\_ 30 – 40 feet

\_\_\_\_\_ 40 – 50 feet

\_\_\_\_\_ 50 – 60 feet

\_\_\_\_\_ 60 – 70 feet

\_\_\_\_\_ 70 – 80 feet

\_\_\_\_\_ Over 80 feet

98 DON'T KNOW

99 REFUSED

Q5 In a typical month, how many one-way crossings do all the trucks in your fleet make? Please base your answer on a trip being a one-way trip, so count a round trip as two trips.

\_\_\_\_\_ **[ENTER NUMBER]**

98 DON'T KNOW

99 REFUSED

Q6 What routes do you typically use for moving freight?

**[SELECT ALL THAT APPLY]**

1 (Seattle / Bainbridge)

2 (Seattle / Bremerton)

3 (Edmonds / Kingston)

4 (Mukilteo / Clinton)

5 (Fautleroy / Vashon)

6 (Fautleroy / Southworth)

7 (Point Defiance / Tahlequah)

8 (Keystone / Port Townsend)

9 (Anacortes / San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor))

10 (Interisland San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor))

11 (Vashon / Southworth)

12 OTHER [SPECIFY]

98 DON'T KNOW

99 REFUSED

- Q7 Which of the following categories best describes the business line your company is in?
- Mail or parcel pickup and delivery and / or courier service
  - Retail or wholesale trade delivery
  - Utilities or construction **[IF NECESSARY: That is gas, building materials, cleaning services, goods repair and maintenance, laundry services, etc.)]**
  - All services **[IF NECESSARY: That is fire, professional/scientific/technical, educational health care, recreational, public administration, etc.)]**
  - For hire trucking company, vehicle rental or leasing
  - Other **PLEASE SPECIFY:** \_\_\_\_\_
  - DON'T KNOW / REFUSED **[GET DETAILS]** \_\_\_\_\_

Q8 What types of places / locations are you delivering your freight to?

**[SELECT ALL THAT APPLY]**

**[READ LIST – WAIT FOR A YES RESPONSE AFTER READING EACH OPTION]**

- Residential locations
- Retail or commercial businesses
- Warehouses
- Construction sites
- Other **PLEASE SPECIFY:** \_\_\_\_\_
- DON'T KNOW / REFUSE **[GET DETAILS]** \_\_\_\_\_

[READ ONLY IF NECESSARY: What we are doing is recruiting participants to complete an on-line survey. The purpose of this research is to allow freight customers to share their opinions and ideas about determining the best way to utilize existing Ferry routes effectively. The on-line survey will take approximately 10-15 minutes. An email notification will be sent out this week and the survey links will be sent out over the next couple of weeks. You can access the on-line survey at your convenience during the week of July 21 – 27.]

### **INVITATION**

Because of your qualifications, Washington State Ferries would like to invite you to participate in an on-line survey concerning your ferry travel and your opinions on how to manage the ferry system for freight customers. The on-line survey can be accessed at your convenience during the week of July 21 – 27. Would you be willing to participate in this important effort?

**[AS NEEDED: Participants will be sent an e-mail reminder to logon and answer the questions taking only 10 – 15 minutes.]**

**[AS NEEDED: Please know that your responses to this survey will be kept completely confidential. All responses will be combined with the responses of other respondents, and your email address and/or any other identifying information will in no way be linked to your opinions.]**

**ALTERNATE INVITE**

According to the Information you have given me you have qualified for the group however the quota you represent is currently filled. We would like to keep your information on our Alternates list in case there are any cancellations. The on-line survey will take place during the week of July 21 – 27. If there are any changes to the group would you be willing to participate? **[RECORD INFORMATION ON FRONT] IF YES:** Great, we will be calling you back if additional Participants are needed. Thank you very much for your time.

**[AS NEEDED:** Participants will be sent an e-mail reminder to logon and answer the questions taking only 10 – 15 minutes.]

**[AS NEEDED:** Please know that your responses to this survey will be kept completely confidential. All responses will be combined with the responses of other respondents, and your email address and/or any other identifying information will in no way be linked to your opinions.]

**[IF YES CONTINUE OTHERWISE GET DETAILS AND RECORD ON FRONT]**

Great, we'll be sending you an email to confirm this invitation so I will need to get some contact information from you **[RECORD INFORMATION ON FRONT PAGE]:**

**PHONE NUMBERS –** We will need to follow up and ensure that you have received your Confirmation Email. It is very important that we are able to get a hold of you at any time during the day so what would be the best Phone Number for us to reach you during Daytime Hours? And what would be the best Phone Number for us to reach you during the Evening Hours? **[REPEAT PHONE NUMBERS BACK TO RESPONDENT TO VERIFY]**

DAY TIME PHONE NUMBER (with area code) \_\_\_\_\_

EVENING PHONE NUMBER (with area code) \_\_\_\_\_

**EMAIL ADDRESS –** In addition to the confirmation email, you will be sent an email with a link to the forum and you will be given a username and password do you have an email address that we can send that information through? **[REPEAT EMAIL ADDRESS BACK TO RESPONDENT TO VERIFY]**

EMAIL ADDRESS \_\_\_\_\_

**[HAVE RESPONDENT RECORD GROUP INFORMATION].** For this project, it is very important that we are able to count on your participation so if, for any reason, you find yourself unable to participate or if you have any questions, please call us at **1-866-461-0700** as soon as possible. We really appreciate your willingness to participate and look forward to meeting you soon.].

## On-Line Survey Questionnaire

LOGIN SCREEN:

Thank you for participating in this survey!

Please enter the Survey ID number from the email invitation you received and then click NEXT.

INTRO:

### 2008 WSTC Freight Customer Surveys

Dear Valued Ferry Customer:

#### It's No Secret!!!

Washington State Ferries (WSF) is facing serious financial and operational challenges. Several studies are currently underway to help WSF develop comprehensive solutions that will meet the needs of its customers in the future. As part of the effort, the Legislature directed the Washington State Transportation Commission (WSTC) to conduct a survey of ferry users like you.

Specifically the legislation calls out that **freight users** must be surveyed as part of this process.

WSTC has selected Opinion Research Northwest (ORC-NW) to conduct this survey. Your cooperation with the survey team in responding to the questionnaire will be very important to developing informed solutions. Please take the time to complete this **very important survey** so that your voice is heard and considered.

Your answers on this survey will be kept completely confidential. Your participation in this research effort is greatly appreciated. Thank you for playing an important role in WSF's future!

Sincerely,



Dan O'Neal  
Chairman, Washington State Transportation Commission

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For more information on Opinion Research Northwest and to see a list of Frequently Asked Questions about this study, go to: <http://www.opinionresearch.com/northwest>. If you would like to contact ORC-NW for more information about this study, please call (866) 461-0700 and ask for the ferry study or e-mail [ferryinfo@nwrq.com](mailto:ferryinfo@nwrq.com).

For more information on the Ferry Customer Survey, go to: <http://www.wstc.wa.gov/FerryCustomerSurvey/default.htm>

## SCHEDULING

Q1A What route do you use **most often** for moving freight?

*Please select only one option.*

- 1 Seattle / Bainbridge
- 2 Seattle / Bremerton
- 3 Edmonds / Kingston
- 4 Mukilteo / Clinton
- 5 Fauntleroy / Vashon
- 6 Fauntleroy / Southworth
- 7 Vashon / Southworth
- 8 Point Defiance / Tahlequah
- 9 Keystone / Port Townsend
- 10 Anacortes / San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 11 Interisland San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 12 Other **[Specify]**
- 98 Don't Know
- 99 Prefer not to answer

Q1B What other routes do you **typically** use for moving freight?

*Please select all that apply.*

- 1 Seattle / Bainbridge
- 2 Seattle / Bremerton
- 3 Edmonds / Kingston
- 4 Mukilteo / Clinton
- 5 Fauntleroy / Vashon
- 6 Fauntleroy / Southworth
- 7 Vashon / Southworth
- 8 Point Defiance / Tahlequah
- 9 Keystone / Port Townsend
- 10 Anacortes / San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 11 Interisland San Juans (Includes Shaw, Orcas, Lopez, and Friday Harbor)
- 12 Other **[Specify]**
- 97 No Other Routes
- 98 Don't Know
- 99 Prefer not to answer

Q2A [IF Q1A =1 or Q1B = 1] In a typical month, how many of your freight trips between **Bainbridge and Seattle** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:00 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2B [IF Q1A = 2 or Q1B = 2] In a typical month, how many of your freight trips between **Bremerton and Seattle** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:00 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2C [IF Q1A =3 or Q1B = 3] In a typical month, how many of your freight trips between **Edmonds and Kingston** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 6:00 a.m. and 10:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2D [IF Q1A = 4 or Q1B = 4] In a typical month, how many of your freight trips between **Mukilteo and Clinton** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 6:00 a.m. and 10:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2E [IF Q1A =5 or Q1B = 5] In a typical month, how many of your freight trips between **Fauntleroy and Vashon** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:30 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 3:00 p.m. and 9:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 3:00 p.m. and 9:00 p.m.
- SUNDAY – Any other time or direction

Q2F [IF Q1A =6 or Q1B = 6] In a typical month, how many of your freight trips between **Fauntleroy and Southworth** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:00 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 4:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2G [IF Q1A =7 or Q1B = 7] In a typical month, how many of your freight trips between **Vashon and Southworth** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 6:00 a.m. and 10:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 11:00 a.m. and 5:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2H [IF Q1A =1 or Q1B = 1] In a typical month, how many of your freight trips between **Point Defiance and Tahlequah** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:30 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 12:00 p.m. and 6:00 p.m.
- SUNDAY – Any other time or direction

Q2I [IF Q1A =9 or Q1B = 9] In a typical month, how many of your freight trips between **Keystone and Port Townsend** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 9:00 a.m. and 1:00 p.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 3:00 p.m. and 7:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 12:00 p.m. and 6:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 11:00 a.m. and 5:00 p.m.
- SUNDAY – Any other time or direction

Q2J [IF Q1A =10,11 or Q1B = 10, 11] In a typical month, how many of your freight trips on the **San Juans** are taken during each of the following travel periods?

*Please enter a number in each box below. If none, please enter "0".*

**WEEKDAYS:**

- EASTBOUND – Between 5:30 a.m. and 9:00 a.m. any weekday
- EASTBOUND – Any other times
- WESTBOUND – Between 2:00 p.m. and 6:00 p.m. any weekday
- WESTBOUND – Any other times

**WEEKENDS:**

- SATURDAY – WESTBOUND between 10:00 a.m. and 4:00 p.m.
- SATURDAY – Any other time or direction
- SUNDAY – EASTBOUND between 10:00 a.m. and 4:00 p.m.
- SUNDAY – Any other time or direction

**[NOTE TO PROGRAMMER: Create a variable that identifies whether they travel during peak times. The logic will be: PEAK = Q2A1 + Q2A3 + Q2A5 + Q2A7 + Q2B1 + Q2B3 + Q2B5 + Q2B7 + ...+ Q2J1 + Q2J3 + Q2J5 + Q2J7]**

Q3 What factors influence your decision as to which specific ferry sailing to take?  
*Please use the box below to type in your response then click NEXT to continue.*

**[Open-End]**

- 1 *Have a delivery time set by destination*
- 2 *Traffic from ferry terminal to destination*
- 3 *Traffic from freight warehouse to ferry terminal*
- 4 *Avoid peak travel times on ferry*
- 5 *Schedule of freight drivers*
- 6 *Avoid long wait time between sailings*
- 7 *Avoid sailings with limited capacity for freight customers*
- 8 *Some other factors [specify]*
- 9 *Prefer not to answer*

Q4 What degree of flexibility do you have in travel on the ferry in terms of the **time of day** you schedule your drivers?

- 1 Completely flexible
- 2 Somewhat flexible
- 3 Neither flexible nor inflexible
- 4 Somewhat inflexible
- 5 Completely inflexible
- 9 Prefer not to answer

Q5 What degree of flexibility do you have in your travel on the ferry in terms of the **day of the week** you schedule your drivers?

- 1 Completely flexible
- 2 Somewhat flexible
- 3 Neither flexible nor inflexible
- 4 Somewhat inflexible
- 5 Completely inflexible
- 9 Prefer not to answer

Q6 What factors affect your flexibility in terms of time of day and/or day of the week you schedule freight trips on the ferries?

*Please use the box below to type in your response then click NEXT to continue.*

**[OPEN-END]**

### **Wait Times**

Q8 One problem that freight customers / commercial vehicle drivers often encounter during peak travel periods (when passenger vehicle demand is high) is how long / for how many boats they have to wait before they can drive on.

How big of an issue or problem would you say the **wait time** is for you or your drivers?

- 1 A major issue / problem
- 2 A minor issue / problem
- 3 Not an issue / problem
- 9 Prefer not to answer

Q9A **[SKIP IF DON'T TRAVEL DURING PEAK TIMES IN Q2A-Q2J]** Currently, what is the **average number of boats** you or your drivers have to wait through during these peak travel periods (when passenger vehicle demand is high)?

\_\_\_\_\_ **[Enter Number] [PROGRAMMER: Range 0-99]**

Don't Travel During Peak Periods

Prefer Not To Answer

Q10 What strategies do you use to **minimize the number of boats** you or your drivers might have to wait through?

*Please use the box below to type in your response then click NEXT to continue.*

**[OPEN-END]**

**Reservations**

Q12 One strategy under consideration and being tested on some routes is a **Vehicle Reservation System** that would allow freight customers to **Call Ahead or Go On-Line to Make a Reservation for a Specific Trip**. To what extent do you agree or disagree with each of the following statements about a **Reservation System**?

	<b>Strongly Disagree</b>		<b>Neither</b>		<b>Strongly Agree</b>	<b>Prefer not to answer</b>
Freight customers with a reservation would <b>Pay A Premium</b> over the regular fare	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9
If a freight customer with a reservation does not arrive on time their <b>Space Would Be Released</b> for general boarding and the company would <b>Forfeit Their Reserved Space and Payment</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9
<b>Some</b> space should be <b>Available For Reservation A Month Ahead</b> of travel and some space should only be available for reservation <b>One Day Ahead Of Travel</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9
The <b>Reservation System Would Inform Freight Customers</b> on how much <b>Capacity</b> is reserved, how much is available for reservation, and how much is open for first come, first serve	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9

Q13A As you are aware fares for freight and other oversized vehicles are based on length. Consider if WSF were to implement a reservation system for freight customers that has the following features:

- Space would be released for general boarding and the company would forfeit their reserved space and payment.
- Some space would be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve.

How willing would your company be to pay a premium that is **50 Percent Greater** than the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

- 1 Very willing
- 2 Somewhat willing
- 3 Neither willing nor unwilling
- 4 Somewhat unwilling
- 5 Very unwilling
- 9 Prefer not to answer

Q13B **[IF Q13A LE 3]** Consider if WSF were to implement a reservation system for freight customers that has the following features:

- Space would be released for general boarding and the company would forfeit their reserved space and payment.
- Some space would be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve.

How willing would your company be to pay a premium that is **Double** the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

- 1 Very willing
- 2 Somewhat willing
- 3 Neither willing nor unwilling
- 4 Somewhat unwilling
- 5 Very unwilling
- 9 Prefer not to answer

Q13C **[IF Q13B GE 4 BUT NOT EQ 9]** Consider if WSF were to implement a reservation system for freight customers that has the following features:

- Space would be released for general boarding and the company would forfeit their reserved space and payment.
- Some space would be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve.

How willing would your company be to pay a premium that is **75 Percent Greater** than the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

- 1 Very willing
- 2 Somewhat willing
- 3 Neither willing nor unwilling
- 4 Somewhat unwilling
- 5 Very unwilling
- 9 Prefer not to answer

Q13D **[IF Q13A GE 4 BUT NOT EQ 9]** Consider if WSF were to implement a reservation system for freight customers that has the following features:

- Space would be released for general boarding and the company would forfeit their reserved space and payment.
- Some space would be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve.

How willing would your company be to pay a premium that is **25 Percent Greater** than the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

- 1 Very willing
- 2 Somewhat willing
- 3 Neither willing nor unwilling
- 4 Somewhat unwilling
- 5 Very unwilling
- 9 Prefer not to answer

Q13E **[IF Q13D GE 4 BUT NOT EQ 9]** Consider if WSF were to implement a reservation system for freight customers that has the following features:

- Space would be released for general boarding and the company would forfeit their reserved space and payment.
- Some space would be available for reservation a month ahead of travel and some space would only be available for reservation one day ahead of travel.
- The reservation system would inform freight customers on how much capacity is reserved, how much is available for reservation, and how much is open for first come, first serve.

How willing would your company be to pay a premium that is **10 Percent Greater** than the fare currently charged for freight vehicles for a guaranteed space on the ferry at a specific boarding time?

- 1 Very willing
- 2 Somewhat willing
- 3 Neither willing nor unwilling
- 4 Somewhat unwilling
- 5 Very unwilling
- 9 Prefer not to answer

Q13F **[IF Q13E EQ 4 OR 5]** Why would you be unwilling to use the proposed freight reservation system?

*Please use the box below to type in your response then click NEXT to continue.*

**[OPEN-END]**

Q13G [ALL] To what extent do you agree or disagree with the following statements about a **Reservation System**?

*Peak Travel Period Is Defined as:*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
 - 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

	Strongly Disagree		Neither		Strongly Agree	Prefer not to answer
Only routes and/or sailings with <b>High Freight Traffic</b> should have a freight reservation system	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9
Reservations would be available only during <b>Peak Travel Periods</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9

**Congestion Pricing**

Q14 To what extent do you agree or disagree with each of the following statements.

*Peak Travel Period Is Defined as:*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
 - 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

	Strong Disagree		Neither Agree Nor Disagree		Strongly Agree	Prefer not to answer
Freight customers who drive on during <b>Peak Travel</b> periods would be charged a <b>Premium</b> over the regular freight fares	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9
Freight customers who drive on during <b>Off-Peak Travel</b> periods would receive a <b>Discount</b> from the regular freight fares	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 9

Q16A Imagine WSF were to implement a system where freight customers who use the ferry during **peak** travel periods **as defined below** had to pay a premium that is **50 percent greater** than the fare currently charged for freight vehicles.

*Peak Travel Period When Premium Would Be Charged*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
- 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

How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

Q16B **[IF Q16A LE 3 BUT NOT EQ 9]** Imagine WSF were to implement a system where freight customers who use the ferry during **peak** travel periods **as defined below** had to pay a premium that is **double** the fare currently charged for freight vehicles.

*Peak Travel Period When Premium Would Be Charged*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
- 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

How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

Q16C **[IF Q16B GE 4 BUT NOT EQ 9]** Imagine WSF were to implement a system where freight customers who use the ferry during **peak** travel periods **as defined below** had to pay a premium that is **75 percent greater** than the fare currently charged for freight vehicles.

*Peak Travel Period When Premium Would Be Charged*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
- 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

How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

Q16D **[IF Q16A GE 4 BUT NOT EQ 9]** Imagine WSF were to implement a system where freight customers who use the ferry during **peak** travel periods **as defined below** had to pay a premium that is **25 percent greater** than the fare currently charged for freight vehicles.

*Peak Travel Period When Premium Would Be Charged*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
- 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

How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

Q16E [IF Q16D GE 4 BUT NOT EQ 9] Imagine WSF were to implement a system where freight customers who use the ferry during **peak** travel periods **as defined below** had to pay a premium that is **10 percent greater** than the fare currently charged for freight vehicles.

*Peak Travel Period When Premium Would Be Charged*

MONDAY – FRIDAY - EASTBOUND between 5:30 am and 10:00 am  
- 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

How likely would you be reschedule your freight trips on WSF to avoid these peak travel periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

Q17 If WSF offered **free passage for freight customers** on sailings between **11:00 p.m. and 3:00 a.m. each day**, how likely would you be to schedule your freight travel between those time periods?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely
- 5 Very unlikely
- 9 Prefer not to answer

## Wrap-Up

Q18 What do you feel are the **primary** problems / issues facing the Ferry system with regards to its ability to transport freight customers and help them serve their customers?

*Please use the box below to type in your response then click NEXT to continue.*

### [Open-End]

Q19 Since you / your company started using the ferries for transporting freight, has the frequency with which you transport freight via the ferries. . .?

- 1 Increased significantly [**Skip to Q20**]
- 2 Increased somewhat [**Skip to Q20**]
- 3 No change [**Skip to Q20**]
- 4 Decreased somewhat
- 5 Decreased significantly
- 9 Prefer not to answer [**Skip to Q20**]

Q19A [**IF Q19 EQ 4 OR 5**] Which of the following is the **primary** reason for that change?

*Please select all that apply.*

- 1 Drive around instead of using the ferry
- 2 Change in delivery schedule (i.e., delivering less often)
- 3 Cost of fare to ride the ferry is too high
- 4 Ferry travel takes too long
- 5 Ferries waits are too long
- 6 Ferries are unreliable
- 7 Ferry schedule is inconvenient
- 8 Time between ferry sailings is too long
- 9 Some other reason [**Specify**]
- 99 Prefer not to answer

Q20 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.

Is the Washington State Ferries...?

- 1 A Very Good Value
- 2 A Good Value
- 3 Neither A Good Nor Poor Value
- 4 A Poor Value
- 5 A Very Poor Value
- 9 Prefer not to answer

Q21 Other than lowering the price, what could WSF do to help you move freight on the ferries?

*Please use the box below to type in your response then click NEXT to continue.*

**[OPEN-END]**

THANK Thank you for completing this on-line survey and sharing your idea and opinions.

Please click "NEXT" to exit survey.

S