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PierPASS

Los Angeles/Long Beach Harbor Truckers
Follow-up Survey

Summary Report

November-December 2006

630-146

**LOS ANGELES/LONG BEACH HARBOR TRUCKERS SURVEY
FOLLOW-UP SURVEY SUMMARY REPORT
PierPASS OffPeak Program**

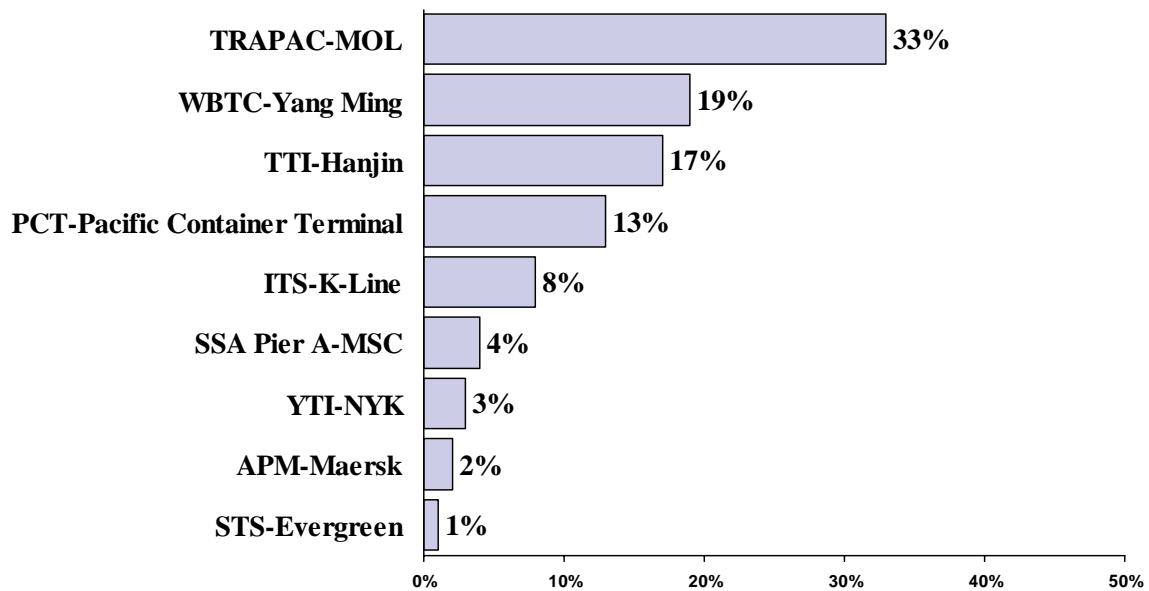
Introduction and Methodology

PierPass, a not-for-profit company created by marine terminal operators, commissioned a new survey as a follow-up to the survey conducted among truckers serving Los Angeles and Long Beach Harbors between May 18 and 27, 2006. Like that survey, the focus in this latest inquiry was on perceptions of and participation in the OffPeak Program for Los Angeles and Long Beach Harbors. The most recent survey was conducted between November 27 and December 9, 2006.

Survey interviews were completed face-to face in either English or Spanish by interviewers intercepting potential respondents at terminal gates and waiting areas. (Figure 1 shows the distribution of interviews locations. Two-thirds of the interviews were conducted in Spanish.) Interviews were conducted during day and evening shifts as well as the Saturday shift. In all, 451 truckers offered their opinions. (The May 2006 survey had 480 respondents, and the interviewing process for each of the surveys was identical.) Assuming the respondents represent a random sampling of truckers serving the two contiguous ports, the margin of error for the sample as a whole is plus or minus 4.6 percent. The error margin is greater for subgroups of the sample as the error margin increases as the sample group decreases in number.

A standard questionnaire was utilized for all interviews, and the interviews averaged between 10 and 15 minutes per respondent.

Figure 1
Interview Locations



Findings

A high number of truckers continue to say that they are familiar with the OffPeak Program. The November /December survey reports a six percent drop in familiarity – 77 percent compared to 83 percent in the previous survey -- but this difference may simply be a chance variation related to the intercept interview collection process. In practical terms, as of year-end 2006, a large majority of truckers say they know about the OffPeak Program. Likewise, among those familiar with the Program, positive opinion of the Program prevails over negative opinions on an overall basis by a substantial ratio. Many truckers also continue to attribute personal benefits to the OffPeak Program, including more productivity and higher earnings, as well as work and life style improvements.

One-third of truckers had a “very positive” view of the OffPeak Program at year-end, a reduction from the initial 2006 survey. While the ratio of positive to negative assessments reduced from nearly two to one to three to two, there continues to be a healthy margin of “very positive” opinion over “very negative” opinion of the Program. On a net basis, favorable opinion decreased from 55 percent to 47 percent of all truckers working in the two ports, including those who are not familiar with the Program or its name. (See Figures 2 and 3.)

Figure 2
Familiar with OffPeak Program?

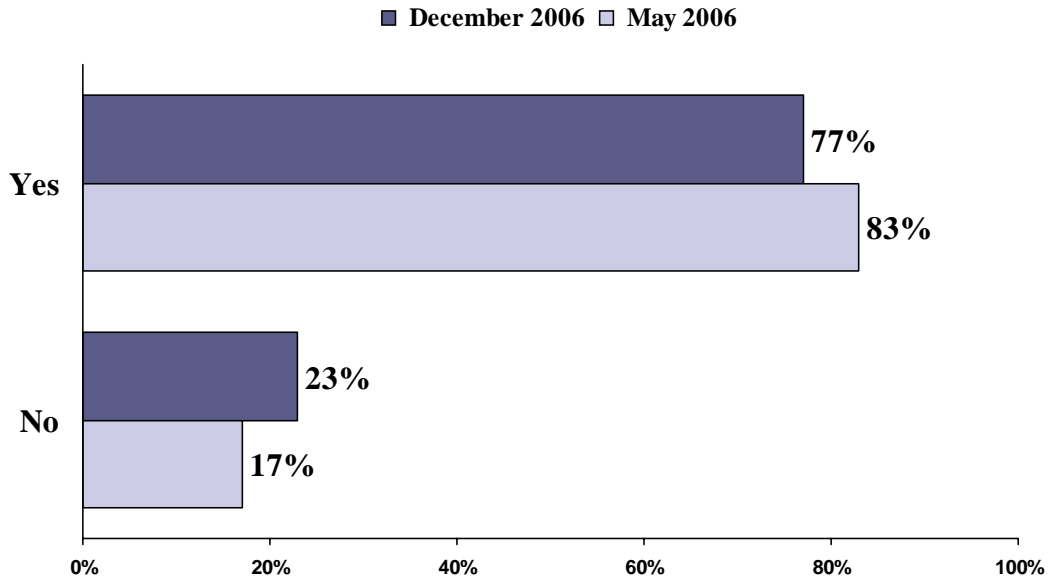
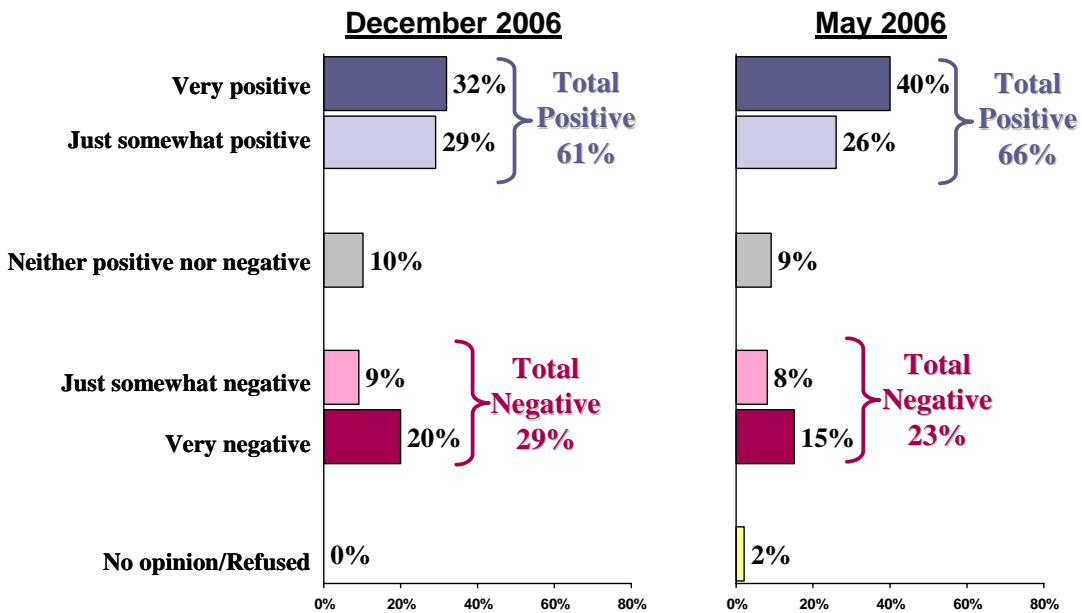


Figure 3
Overall Opinion of OffPeak Program
(Asked Only of Those Familiar with OffPeak)



More than four in ten truckers continue to say they are able to make more trips per shift because of the OffPeak Program, and about 60 percent of those with greater productivity also report higher earnings. Overall, among the Program-aware truckers, a slightly larger number of truckers in the most recent survey (37 percent) compared to the initial survey (33 percent) said they have higher earnings because of the OffPeak Program. (Figure 4 reports these responses.)

Figure 4
Personally Experienced Benefits of OffPeak Program?
(Asked Only of Those Familiar with OffPeak)

Benefits	December 2006			May 2006		
	Yes	No	No Opinion	Yes	No	No Opinion
Reduced traffic congestion	67%	31%	2%	71%	27%	1%
More flexibility with your work schedule	66%	34%	1%	65%	33%	2%
More trips per shift	45%	53%	2%	43%	55%	2%
Higher earnings	37%	61%	2%	33%	67%	1%

Younger and middle-age truckers and port truckers with ten years or less of work experience continue to be the age and work longevity groupings that are more likely to have a positive opinion of the OffPeak Program. Nevertheless in the year-end survey, as in the initial survey, a majority or plurality of each age group, among those aware of the Program, have a favorable opinion of the Program, as does each set of drivers grouped according to how long they have been on the job.

In addition, there continues to be no meaningful difference of opinion regarding OffPeak according to whether the interview was conducted in Spanish or English. Truckers who reported positive effects on their work and quality of life – more income, work routine changes for the good and more flexibility in work schedule, for example -- are the most likely to hold a more positive opinion of the Program overall. (See Figure 5.)

Figure 5

May and November/December Comparative Analysis of Demographic and Attitudinal Groupings According to Positive and Negative Opinion of the OffPeak Program

Demographic Group	November/December 2006			May 2006		
	Total Positive	Total Negative	Neither	Total Positive	Total Negative	Neither
OVERALL	61%	29%	10%	66%	23%	9%
Age						
18-29	57%	27%	17%	79%	16%	5%
30-39	61%	32%	7%	71%	21%	8%
40-49	66%	26%	7%	66%	22%	9%
50-59	55%	31%	14%	47%	35%	13%
60-74	50%	40%	10%	67%	22%	11%
Years Working As Truck Driver in the Port						
Working 0-2 yrs	68%	22%	11%	88%	10%	2%
Working 2-10 yrs	62%	28%	10%	64%	21%	14%
Working 10+ yrs	56%	34%	9%	60%	31%	5%
Interview Language						
Spanish	60%	31%	9%	65%	23%	10%
English	63%	26%	11%	68%	23%	7%
Work Schedule Changes?						
Yes, good	92%	4%	3%	94%	4%	3%
Yes, not good	36%	55%	9%	38%	48%	12%
Total Yes, work schedule changes	64%	30%	6%	70%	22%	6%
No work schedule changes	57%	26%	16%	56%	24%	14%
Higher Earnings?						
Yes	78%	15%	8%	89%	7%	4%
No	50%	38%	11%	55%	31%	11%
More Flexibility in Work Schedule?						
Yes	73%	20%	7%	77%	14%	8%
No	37%	48%	15%	45%	41%	11%
Work Start Time (May 2006)						
Start 5am-10am	NA	NA	NA	65%	22%	11%
Start 11am-3pm	NA	NA	NA	76%	19%	4%
Start 4pm-4am	NA	NA	NA	64%	31%	4%

Figure 5; Continued

Demographic Group	November/December 2006			May 2006		
	Total Positive	Total Negative	Neither	Total Positive	Total Negative	Neither
Work Start Time (December 2006)						
Start 3am-9am	63%	28%	11%	NA	NA	NA
Start 9am-3pm	61%	26%	9%	NA	NA	NA
Start 3pm-6am	59%	38%	4%	NA	NA	NA
Work Finish Time (December 2006)						
Finish 12 noon-3 pm	88%	13%	0%	NA	NA	NA
Finish 3 pm-6 pm	59%	28%	12%	NA	NA	NA
Finish 6 pm-9 pm	63%	27%	10%	NA	NA	NA
Finish 9 pm-12 midnight	57%	29%	14%	NA	NA	NA
Finish 12 midnight-3 am	61%	37%	2%	NA	NA	NA
Saturday Work?						
All/Most of the time	63%	31%	6%	66%	20%	12%
Just sometimes	61%	31%	9%	72%	21%	5%
Hardly ever/Never	59%	26%	16%	59%	28%	10%

Isolating truckers with a positive opinion of the OffPeak Program in the most recent survey (61 percent) from those with a negative assessment (29 percent) shows that younger drivers and truckers who have been working at this job for less than ten years make up the bulk of those with a more positive opinion of the OffPeak Program.

Nearly three-quarters (74 percent) of those with a positive view of OffPeak in the November/December survey are between ages 30 and 49. This compares to 76 percent in the initial survey. By comparison, 58 percent of those with a negative opinion in the most recent survey are in that age range, compared to 68 percent in the earlier survey. More than three in ten in the negative opinion group in the year-end survey are between 50 and 59 years of age while only 15 percent of those with a positive opinion are in that age range. In the initial survey, the corresponding number was ten percent.

About two-fifths (39 percent) of the negative opinion group in the year-end survey have been working for ten or more years as a trucker in the ports, but less than a third (31 percent) of the positive opinion group have that much experience at this job. These proportions differ somewhat from the previous survey, which were 47 and 33 percent respectively, but the general tendencies have not altered in the intervening six months between surveys. (See Figure 6.)

Figure 6

**May and November/December Comparative Analysis of OffPeak Program
Positive and Negative Opinion Groups Showing Demographic and
Attitudinal Constituent Groupings**

Demographic Group	November/December 2006			May 2006		
	Total Positive	Total Negative	Neither	Total Positive	Total Negative	Neither
OVERALL	100%	100%	100%	100%	100%	100%
Age						
18-29	8%	8%	15%	11%	7%	6%
30-39	36%	39%	26%	40%	34%	31%
40-49	38%	31%	26%	36%	34%	37%
50-59	15%	18%	24%	11%	23%	23%
60-74	2%	4%	3%	2%	2%	3%
Years Working As Truck Driver in the Port						
Working 0-2 yrs	12%	8%	12%	19%	7%	3%
Working 2-10 yrs	56%	53%	56%	49%	46%	77%
Working 10+ yrs	31%	39%	32%	32%	47%	20%
Interview Language						
Spanish	67%	72%	65%	61%	63%	71%
English	33%	28%	35%	39%	37%	29%
Work Schedule Changes?						
Yes, good	50%	5%	12%	57%	7%	11%
Yes, not good	20%	64%	32%	17%	62%	40%
Total Yes, work schedule changes	70%	69%	44%	74%	68%	51%
No work schedule changes	30%	28%	53%	25%	32%	49%
Higher Earnings?						
Yes	47%	19%	29%	44%	10%	14%
No	50%	79%	71%	56%	90%	86%
More Flexibility in Work Schedule?						
Yes	79%	45%	47%	76%	40%	57%
No	20%	55%	53%	22%	59%	40%
Work Start Time (May 2006)						
Start 5am-10am	NA	NA	NA	63%	62%	83%
Start 11am-3pm	NA	NA	NA	16%	11%	6%
Start 4pm-4am	NA	NA	NA	18%	25%	9%

Figure 6; Continued

Demographic Group	November/December 2006			May 2006		
	Total Positive	Total Negative	Neither	Total Positive	Total Negative	Neither
Work Start Time (December 2006)						
Start 3am-9am	74%	71%	85%	NA	NA	NA
Start 9am-3pm	10%	9%	9%	NA	NA	NA
Start 3pm-6am	16%	21%	6%	NA	NA	NA
Work Finish Time (December 2006)						
Finish 12 noon-3 pm	3%	1%	0%	NA	NA	NA
Finish 3 pm-6 pm	42%	41%	53%	NA	NA	NA
Finish 6 pm-9 pm	23%	21%	24%	NA	NA	NA
Finish 9 pm-12 midnight	14%	15%	21%	NA	NA	NA
Finish 12 midnight-3 am	18%	23%	3%	NA	NA	NA
Saturday Work?						
All/Most of the time	30%	31%	18%	31%	27%	43%
Just sometimes	43%	45%	38%	41%	35%	23%
Hardly ever/Never	26%	24%	44%	27%	37%	34%

As figure 6 shows, interview language – Spanish or English – continues to have no bearing on the composition of either the positive or negative opinion groupings.

Overall, nearly as many truckers aware of the Program reported a work schedule change since the inception of the OffPeak Program in the most recent survey as did in the earlier study – 67 compared to 69 percent respectively. But a smaller number now say this change has been “for the good,” and as many now say this change has not been good as say it has been positive. On an overall net basis for the entire truckers sample –Program aware or not -- one in five now say there has been a work schedule change for the good. An equal number say work changes have been negative. In the earlier survey, a third on a net basis had a positive assessment of work changes.

The perceived income effects of the OffPeak Program are virtually identical comparing the recent survey with the initial study.

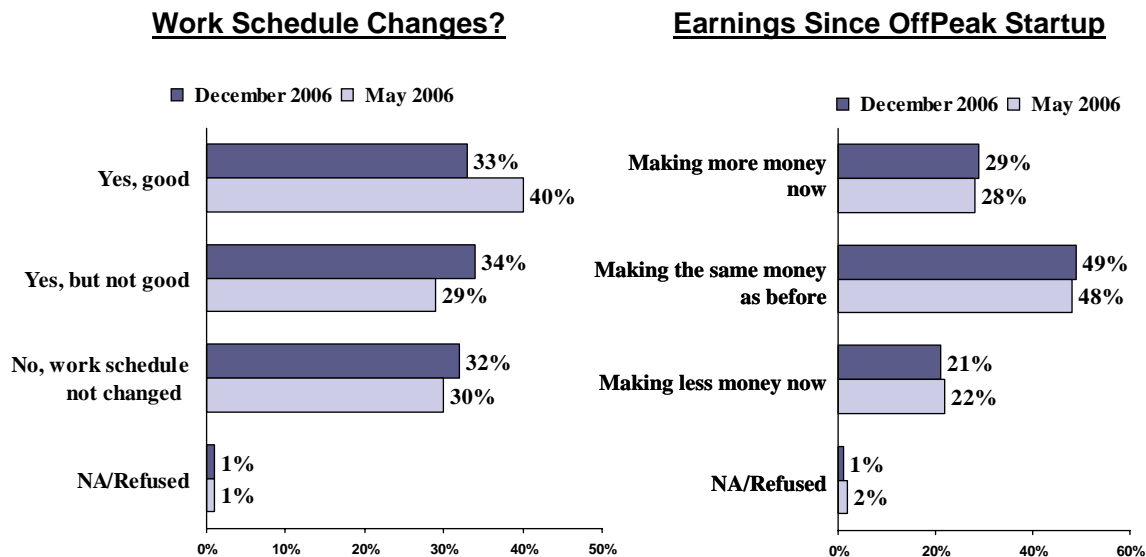
In the May survey, nearly twice as many newer drivers -- those with two years or less experience at this job -- reported more income than those with greater longevity as a port trucker. In the more recent survey, the gap on this issue has virtually disappeared between the less than two-year group and those with between three and nine years

experience as a port trucker, 35 and 32 percent respectively. However, far fewer truckers with ten or more years as a driver say they are making more money when compared to truckers with less experience, a finding similar to the earlier survey. (See Figure 7.)

Figure 7

Personal Impact of OffPeak Program

(Asked Only of Those Familiar with OffPeak)



Fewer truckers aware of the OffPeak Program perceive less congestion outside the terminal gates today compared to the initial survey, 56 percent compared to 67 percent respectively. However, inside the gate, the perception that there is less traffic since the Program began has remained steady with 56 percent in the recent survey compared to 55 percent in the earlier survey. For both locations, drivers say there is less congestion during both the day shift and the off-peak shift, which begins at six in the evening. While very few said that congestion has increased outside terminal gates (6 percent in the earlier survey and nine percent in the year-end survey), larger numbers reported an increase in congestion inside terminal gates. However, that percentage decreased from 20 to 15 percent between the two surveys. These variations in perception notwithstanding, a majority of truckers aware of the OffPeak Program continue to concur that traffic congestion in and outside the terminal gates has reduced appreciably since the inception of the PierPass Program. (See Figures 8 and 9.)

Figure 8

Perceptions of Traffic Congestion Outside Terminal Gates Since Inception of OffPeak

(Asked Only of Those Familiar with OffPeak)

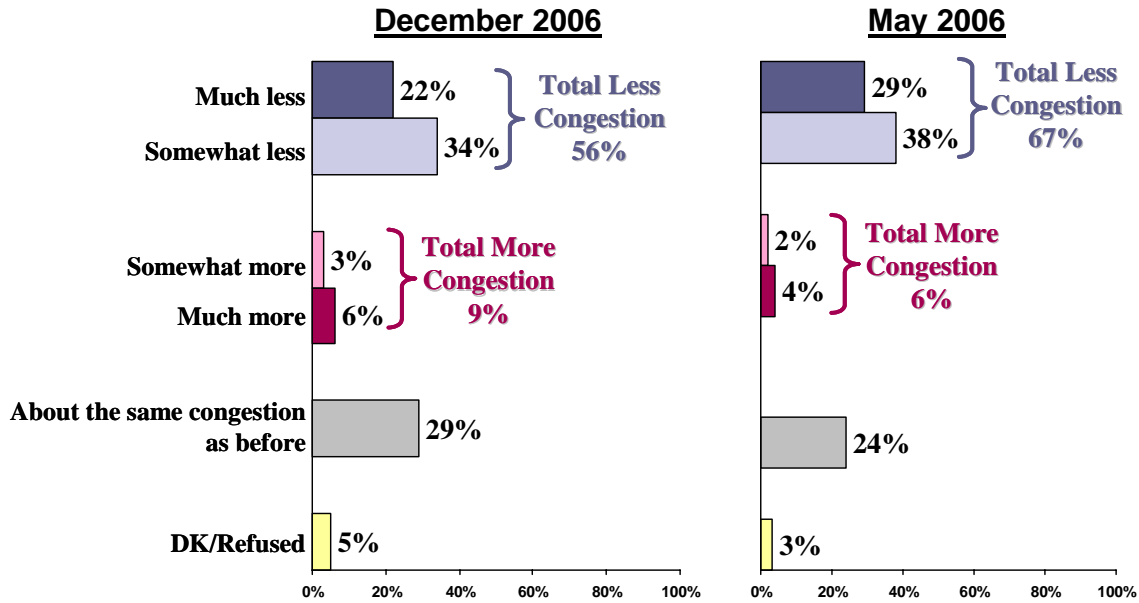
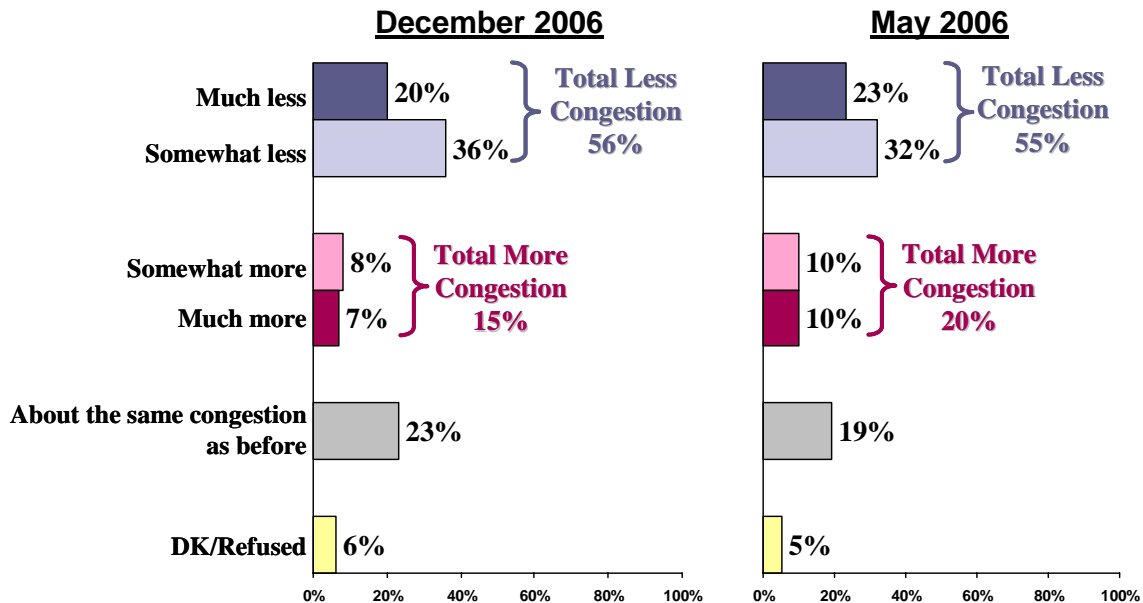


Figure 9

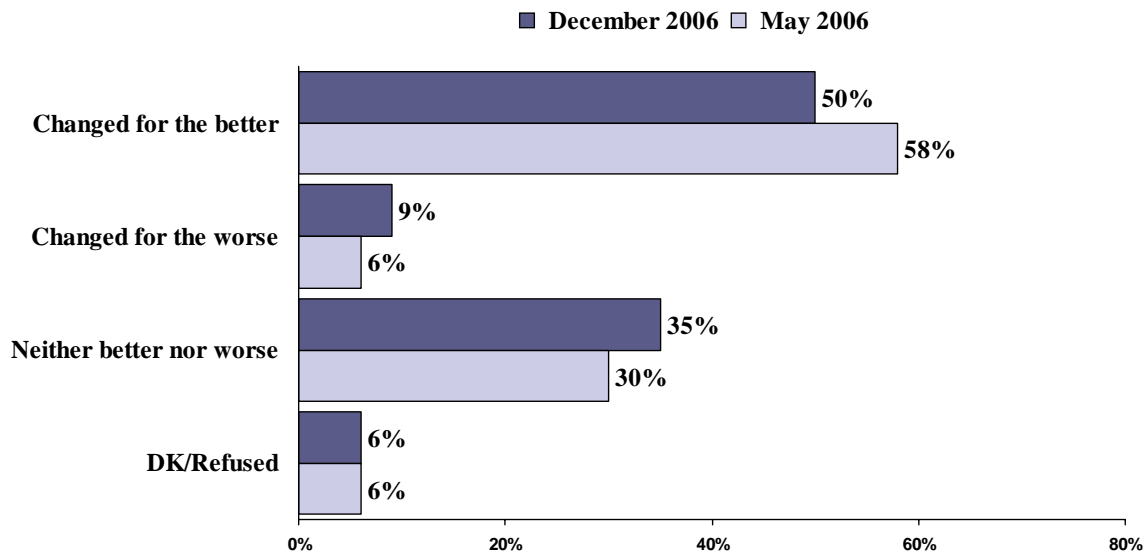
Perceptions of Traffic Congestion Inside Terminal Gates Since Inception of OffPeak

(Asked Only of Those Familiar with OffPeak)



In the most recent survey, six in ten aware of the OffPeak Program say that there has been a change in daytime traffic on the 110 and 710 Freeways, and by a ratio of five to one, they say that this change has been for the better. By comparison, in May, this ratio was ten to one. Further, the percentage saying that there has been “no change” in traffic since the OffPeak Program began has grown from 30 to 35 percent. The age affect seen in many of the perception questions is again present in response to the freeway traffic question, but the differences between age groups and trucker longevity groups are too small to be of much importance. (See Figure 10.)

Figure 10
Perception of Traffic on the 110 and 710 Freeways
(Asked Only of Those Familiar with OffPeak)



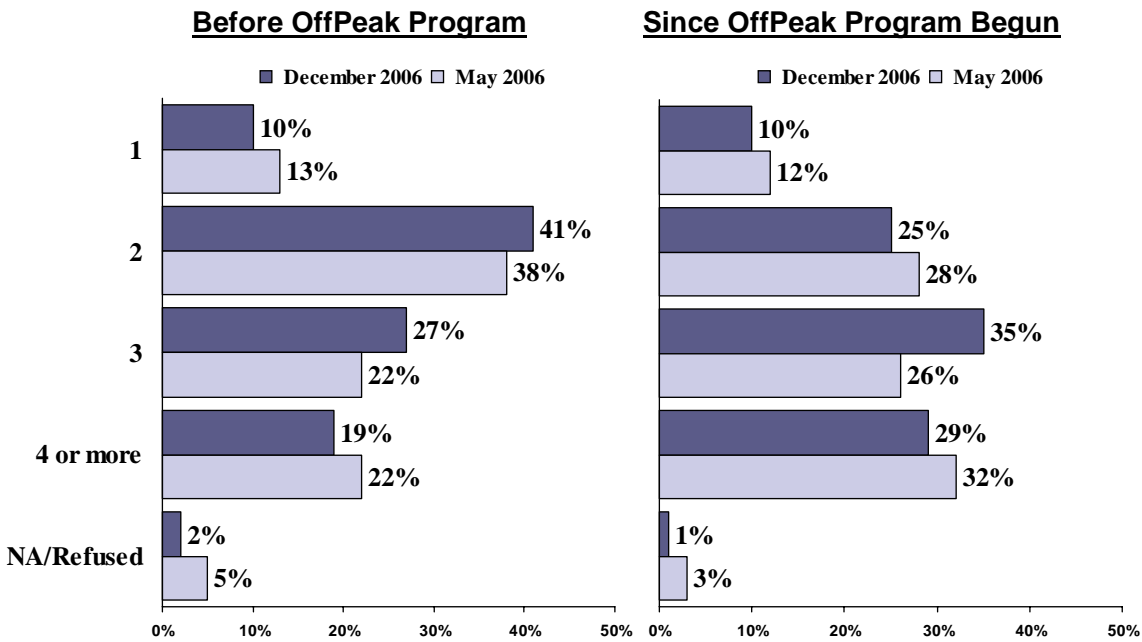
Reflecting the continuing perception of a reduction in traffic and less congestion at the terminal gates, the number of truckers reporting in the year-end survey that they make three or four (or more) trips per shift has increased since the inception of the OffPeak Program. However, comparing the most recent survey with the initial survey, more truckers are reporting that they make three trips a day, not four. In short, the gain in trips per day is tending to settle on three rather than tending towards four, as reported in the earlier survey. In the recent survey, six percent more truckers say they are making three trips a day rather than making four or more trips per shift since the Program started. In

the earlier survey, the four-trip percentage was six percent higher than the three-trip percentage. The percentage reporting only two trips per shift in the May survey diminished ten percent between pre and post initiation of the OffPeak Program. In the recent survey, that difference was 16 percent. (See Figure 11.)

Figure 11

Roundtrips Per Shift

(Asked Only of Those Familiar with OffPeak)



As in the initial survey, the vast majority of truckers (96 percent) report in the year-end survey that they pick up and deliver containers to many terminals as opposed to one in particular. Hanjin (TTI) and WBCT (Yang Ming) dominate the lengthy list of terminals served by the Ports’ truckers. Check-in and check-out times reported in the year-end survey are quite similar to those in the initial survey with check-out times at marine terminal gates continuing to be somewhat faster than check-in. (See Figures 12 and 13.)

Figure 12
Terminals Serviced by Respondents
(Asked of Everyone)

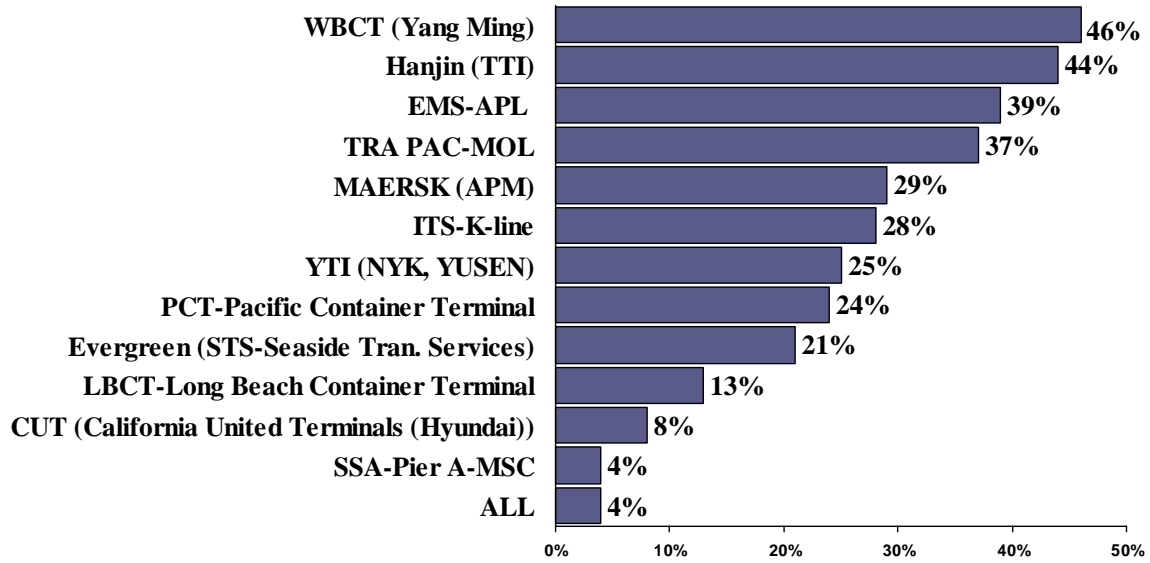
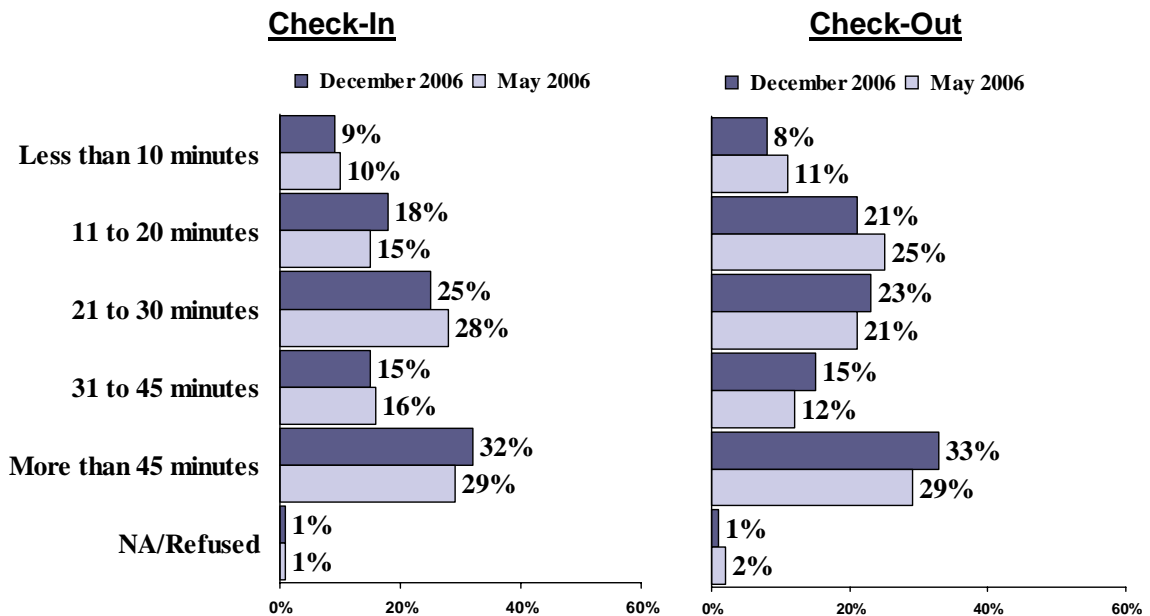


Figure 13
Length of Check-In/Check-Out Times at Marine Terminal Gate
(Asked of Everyone)



In a question only asked in the year-end survey, two-thirds of all truckers report that they start work between six and nine in the morning. Sixteen percent start in the mid-afternoon through early evening. Finishing times are more varied with 57 percent ending the work day outside the three to six afternoon time period. The start/finish numbers suggest that most truckers are working more than an eight-hour shift or are working a split shift. One third of all truckers also say they work between midnight and three in the morning. Since the inception of the OffPeak Program, truckers ending their work after 6 p.m. are somewhat more likely to perceive work schedule changes and say they are for the better and also report making more money, more shift trips and more trips per shift than truckers finishing work during the day to late afternoon. When truckers not working the midnight to three in the morning time period were asked why not, nearly half said they did not like working so late, and another quarter said trucking companies do not send them out at that time. Truckers with less than two years or less of experience, as well as truckers under 45 years of age, tend to work in the midnight to three in the morning time slot more than truckers over 45 years of age and those with more than two years experience as a driver. (See Figures 14-17.)

Figure 14
Monday-Thursday Start and Finish Work Times
(Asked of Everyone)

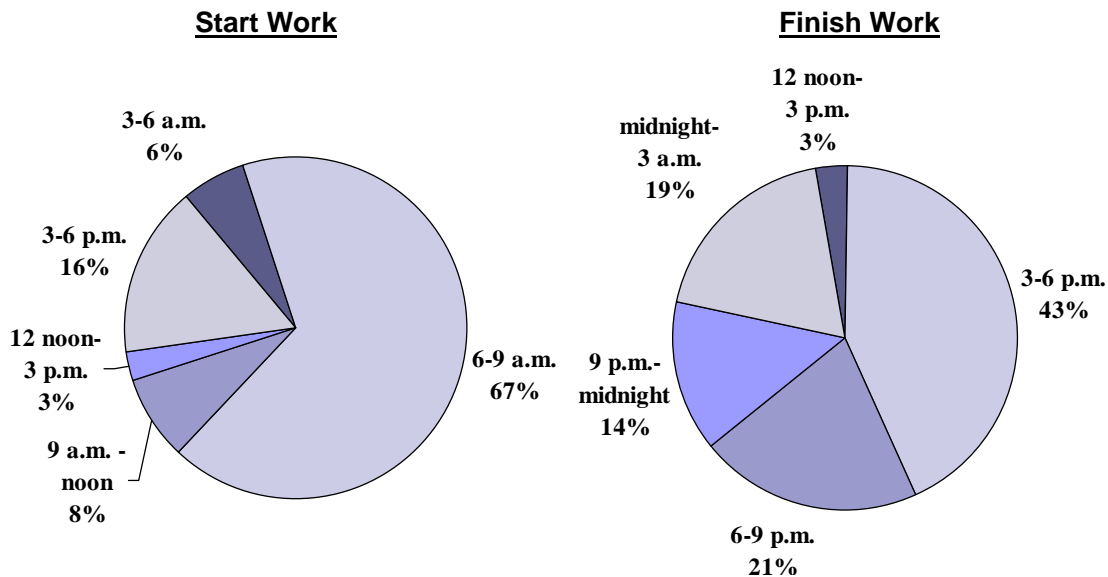


Figure 15

Monday-Thursday Finish Work Times by Program Evaluation Factors
(Asked of Everyone)

	Finish Work Times by Program Evaluation Factors				
	12 noon- 3 pm	3 pm- 6 pm	6 pm- 9 pm	9 pm- 12 midnight	12 midnight- 3 am
Schedule Change because of OffPeak					
Yes/Good	50%	25%	38%	39%	39%
Yes/Not Good	0%	28%	32%	43%	48%
No Change	50%	46%	27%	18%	13%
Since Start of OffPeak . . .					
Making more money	38%	19%	42%	35%	31%
Making same money	50%	59%	38%	51%	35%
Making less money	13%	22%	19%	14%	29%
Experience Benefits of OffPeak					
Reduce traffic congestion/Yes	75%	61%	63%	73%	81%
Reduce traffic congestion/No	13%	37%	36%	25%	18%
More shift trips/Yes	38%	42%	54%	51%	37%
More shift trips/No	63%	57%	42%	47%	60%
Higher earnings/Yes	50%	32%	42%	43%	35%
Higher earnings/No	50%	66%	55%	57%	61%
More flexibility work schedule/Yes	63%	68%	65%	76%	53%
More flexibility work schedule/No	38%	32%	33%	24%	45%
Check-in Time					
Less than 10 minutes	0%	12%	8%	7%	7%
11 to 20 minutes	58%	16%	23%	13%	17%
21 to 30 minutes	0%	28%	24%	20%	26%
31 to 45 minutes	0%	13%	14%	20%	20%
More than 45 minutes	42%	30%	31%	41%	30%
Check-out Time					
Less than 10 minutes	17%	6%	13%	8%	5%
11 to 20 minutes	25%	21%	20%	21%	20%
21 to 30 minutes	0%	24%	22%	16%	29%
31 to 45 minutes	8%	16%	15%	16%	13%
More than 45 minutes	50%	31%	31%	38%	34%
Round Trips Per Shift Since OffPeak					
1	13%	5%	9%	20%	18%
2	50%	28%	21%	16%	26%
3	38%	39%	40%	29%	24%
4 or more	0%	28%	31%	35%	27%

Figure 16
Make Work Trips, Midnight-3:00 a.m., Monday-Thursday
(Asked of Everyone)

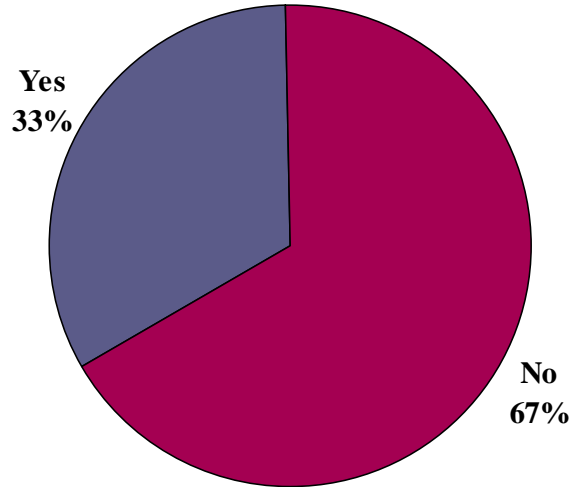
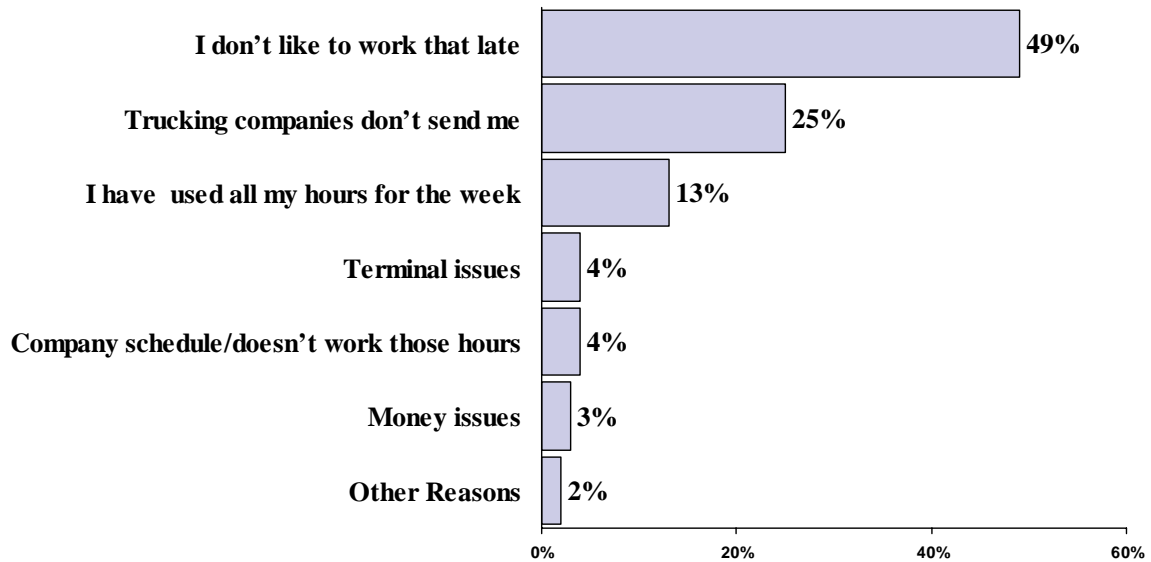


Figure 17
Reasons Not Making Work Trips, Midnight-3:00 a.m., Monday-Thursday
(Asked of Those Not Working Midnight-3:00 a.m., Saturday-Thursday.)



In both the initial and year-end surveys, nearly a third of all truckers report that they work on Saturdays “most of the time.” Another four in ten also work Saturdays “just sometimes.” Half of all truckers say they make work trips after 2:00 p.m. on Saturdays, and for the half that does not, dislike of working late is the principal reason. (See Figures 18, 19 and 20.)

Figure 18

Work Saturdays

(Asked of Everyone)

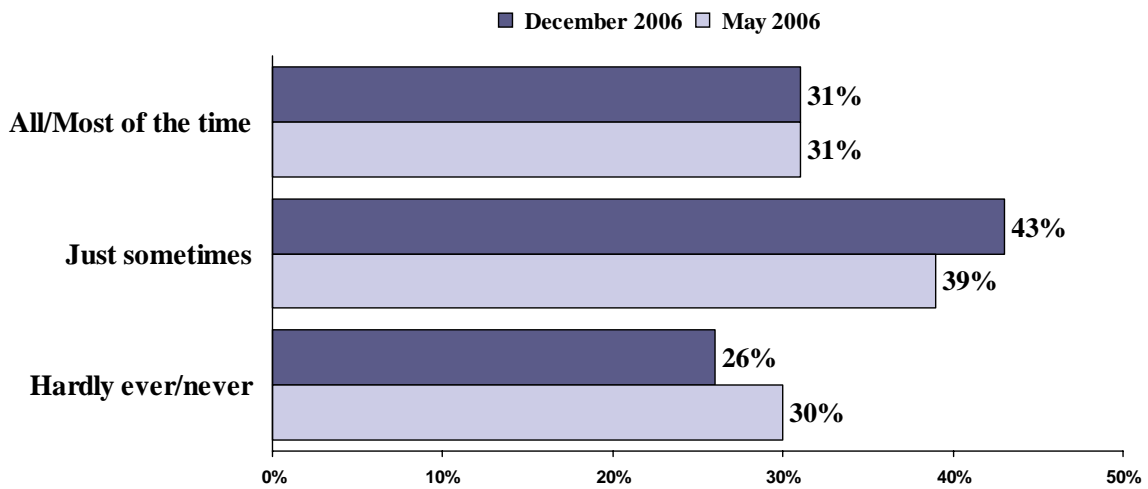


Figure 19

If Work on Saturday, Make Trips After 2:00 p.m.

(Asked only of Respondents Working on Saturday)

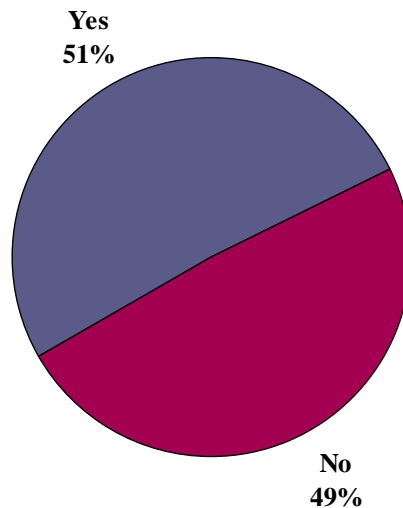
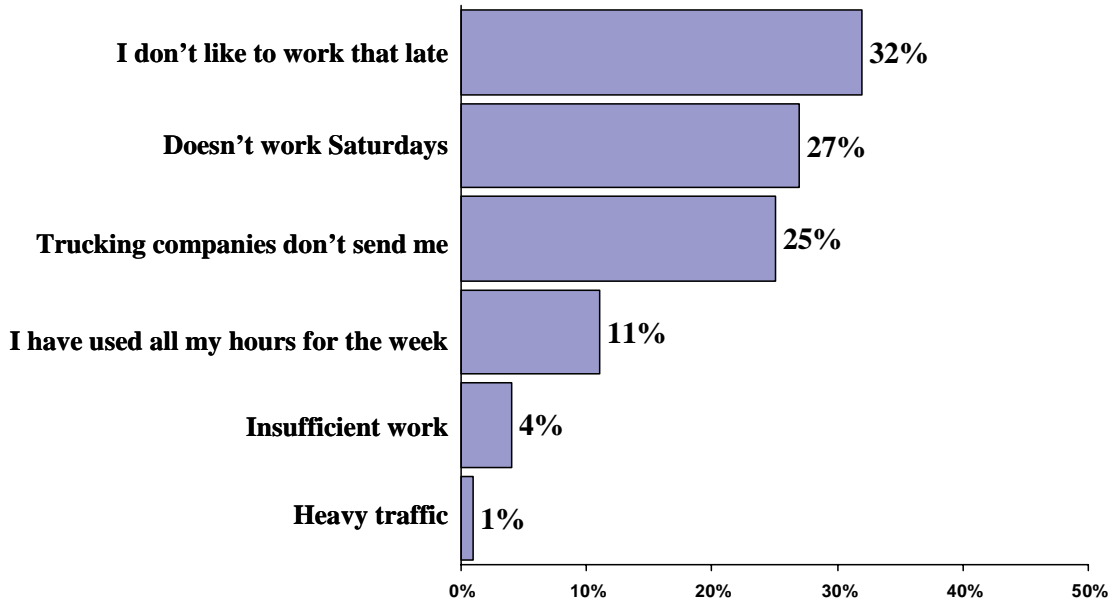
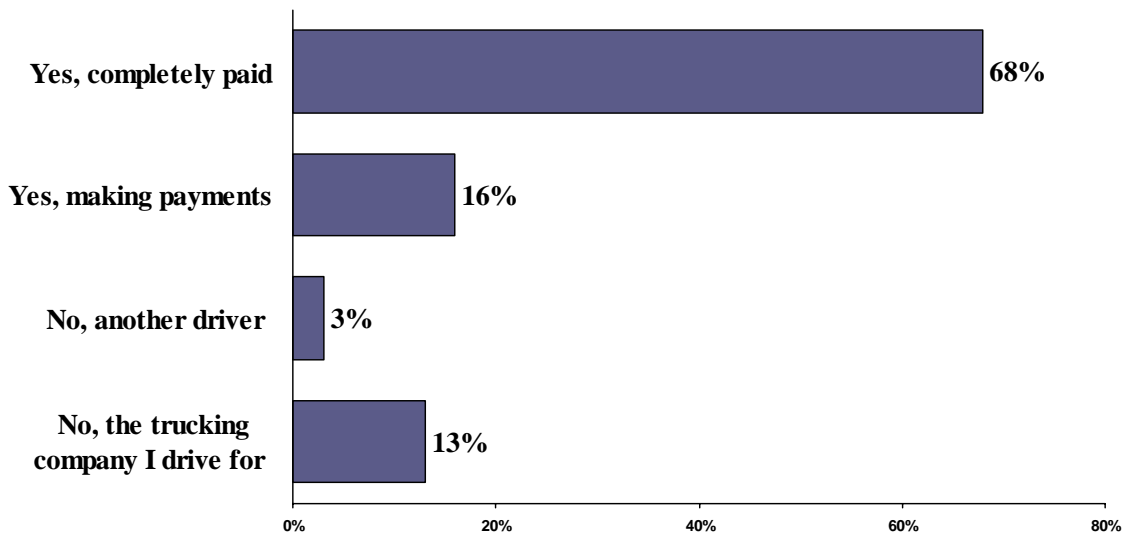


Figure 20
Reasons Not Working on Saturday After 2:00 p.m.
(Asked only of Respondents Not Working on Saturday After 2:00 p.m.)



More than eight in ten truckers say they own their own truck, and 68 percent the truck is completely paid for.

Figure 21
Do You Own Your Own Truck?
(Asked of Everyone)



The profile of survey respondents for the year-end survey closely resembles that of the initial survey. A majority of truckers are between the ages of 35 and 49, and almost half have been driving a truck serving marine terminals between two and ten years. Only two to three percent are age sixty or more and ten percent are under thirty years old. Although not asked directly in the latest survey, the similarity of age demographics suggests that more than 90 percent support a family with their income as a trucker. One to two percent of drivers are female. (See Figure 22.)

Figure 22

LA/LB Port Trucker Demographics

(Asked of Everyone)

