2013 Regional Passenger Study
Final Report

Prepared for:

Casco Bay Lines

Prepared by:

GPCOG
GREATER PORTLAND
COUNCIL OF GOVERNMENTS

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FERRY SERVICE PASSENGER SURVEY TRENDS FROM 2011 TO 2013

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Overview

During the December of 2010 to January 2011, and August and September 2013, passenger surveys were completed on Casco Bay Line's ferry service. The surveys were a coordinated effort between CBL and the Greater Portland Council of Governments (GPCOG). This report documents the results of these surveys.

While the survey questions and structure remained very similar between 2011 and 2013, the distribution of the surveys differed considerably. In 2011, passenger surveys were shared online with the Casco Bay Lines Interested Parties email list, and received a total of 349 responses. The 2013 passenger surveys were distributed in person to passengers and completed while they were on the ferry, in addition to being distributed to the Casco Bay Lines Interested Parties email list. As a result, the 2013 effort received a total of 1,496 responses – 1,306 from on-board passengers, and 190 from the Interested Parties email list.

Since some respondents chose to skip a question that did not apply to them, the total number of responses varies somewhat from question to question.

The surveys were developed by GPCOG, with input from the Transit Operations Working Group (the project and planning implementation team of the PACTS Transit Committee, made up of managers from each of the seven transit providers in the region), and were intended to elicit information on ridership patterns and demographics, as well as rider's attitudes about Greater Portland Area transit services in general. The results were then entered into Survey Monkey, a computer program used to collect and analyze survey responses.

Much appreciation is due to Casco Bay Lines staff for their assistance with the creation of the survey instrument, and the distribution effort. Appreciation is also due to PACTS, the Transit Operations Working Group, and the Federal Transit Administration for their assistance as well.

**Please note that the data displayed in this report represent passenger responses from two discrete periods in time when the surveys were conducted (December of 2010 to January 2011, and August and September 2013). <u>These results are not reflective of current conditions, nor do they account for any changes to service, operations, vehicles or facilities that have been made since the surveys were conducted.</u>*

Key Findings

- In both 2011 and 2013, the vast majority of respondents ended their ferry trip either in Portland or on Peaks Island.
- Of those respondents who did transfer to another mode of transportation after disembarking from the ferry, the majority said they used a personal automobile for both years. Additionally, about three-quarters of ferry respondents do not use any other form of public transit regularly.
- Respondents in 2013 were more likely to report 'Home' or 'Recreation/Sightseeing' as the purpose of their trip, and less likely to report 'Shopping', 'Work' or 'Other'.
- The majority of respondents were either full-time employees or retirees in both 2011 and 2013.
- The majority of respondents reported a total annual household income greater than $65,000.
- There was a difference in age-distribution between survey years. 84% of respondents in 2011 fell within the range of 46-80 years of age, compared to just 58% in 2013. In contrast, younger passengers (45 years or younger) made up 40% of respondents in 2013, and only 13% in 2011.
- In both 2011 and 2013, passengers reported that cost of fare ranked as the most important service attribute, as well as the attribute with which they were least satisfied.
- Passengers in both 2011 and 2013 reported high satisfaction rates with staff knowledge, on-time performance, and destinations served by ferry. However these categories received the lowest votes in terms of overall importance.

Survey Question Data

The following figures and tables display the results of the 2011 and 2013 passenger survey data collected from Casco Bay Lines. The compiled data is intended to offer a regional perspective of ridership trends, and customer priorities and concerns. The survey was composed of a total of 24 questions. Most of those questions enabled respondents to select one or more answers from a number of options. There were also two main "open-ended" questions at the end of the survey, which asked respondents to write in their own responses, and are addressed at the end of this report.

Please note that due to space constraints, only the survey questions deemed most useful to Casco Bay Lines have been included in this regional report.

Figure 1 – Most Recent Trip Ended

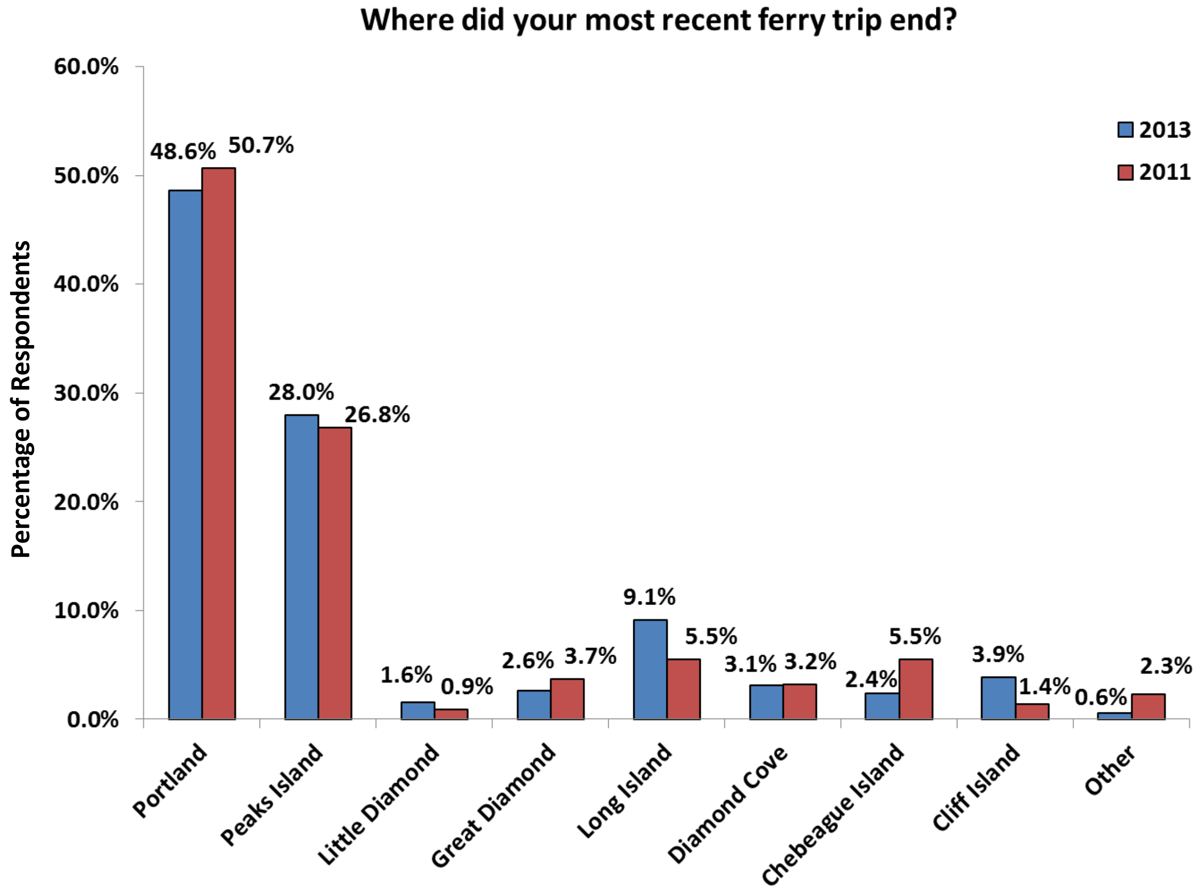


Table 1 – Most Recent Trip Ended

Where did your most recent ferry trip end?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Portland	48.6%	718	50.7%	176
Peaks Island	28.0%	414	26.8%	93
Little Diamond	1.6%	23	0.9%	3
Great Diamond	2.6%	39	3.7%	13
Long Island	9.1%	134	5.5%	19
Diamond Cove	3.1%	46	3.2%	11
Chebeague Island	2.4%	36	5.5%	19
Cliff Island	3.9%	57	1.4%	5
Other	0.6%	9	2.3%	8
answered		**1476**		**347**
skipped question		**20**		**2**

Figure and Table 1 depict where passengers disembarked on their last ferry trip. 50.7% of passengers in 2011 and 48.6% of passengers in 2013 responded that Portland was where they ended their trip. There was an increase in passengers responding that they ended their trip at Long Island from 2011 to 2013, and a similar decrease in passengers reporting Chebeague Island as their destination during that same period.

It is unclear whether these differences may be due in part to the fact that the 2011 surveying only solicited online responses from Casco Bay Lines' Interested Parties email list, as compared to the more diverse group surveyed onboard and online in 2013.

Figure 2 – Mode of Transportation after Transfer

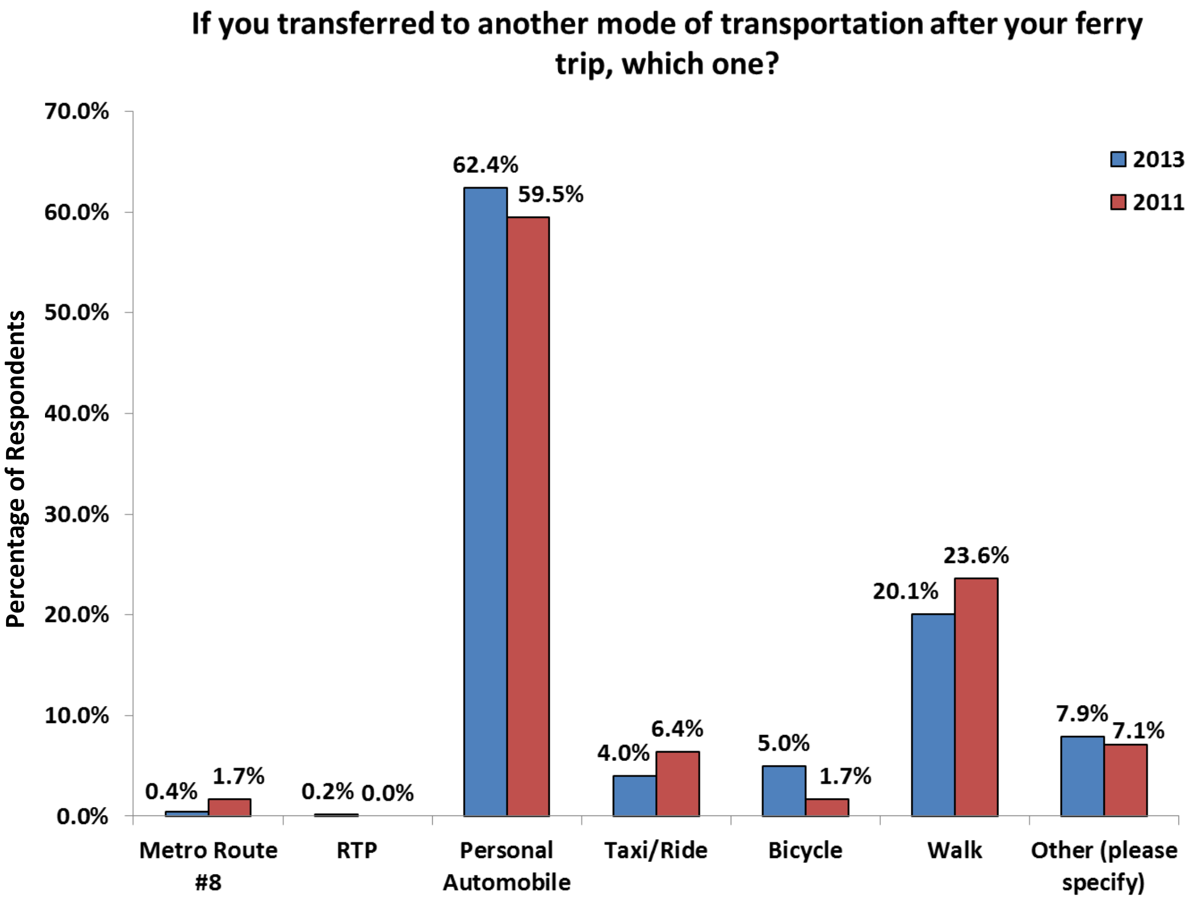


Table 2 – Mode of Transportation after Transfer

Figure and Table 2 examine the modes of transportation that surveyed passengers took following their ferry trip. The majority of respondents in 2011 and 2013 said they transferred to a personal automobile after disembarking from the ferry.

While there was a notable increase in those who reported transferring to a bicycle after their ferry trip in 2013 relative to 2011, there were also decreases in walking and utilizing taxies/rides or Metro Route 8.

If you transferred to another mode of transportation after your ferry trip, which one?	**2013**		**2011**	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Metro Route #8	0.4%	4	1.7%	5
RTP	0.2%	2	0.0%	0
Personal Automobile	62.4%	650	59.5%	176
Taxi/Ride	4.0%	42	6.4%	19
Bicycle	5.0%	52	1.7%	5
Walk	20.1%	209	23.6%	70
Other (please specify)	7.9%	82	7.1%	21
answered		**1041**		**296**
skipped question		**455**		**53**

Figure 3 – Purpose of Trip

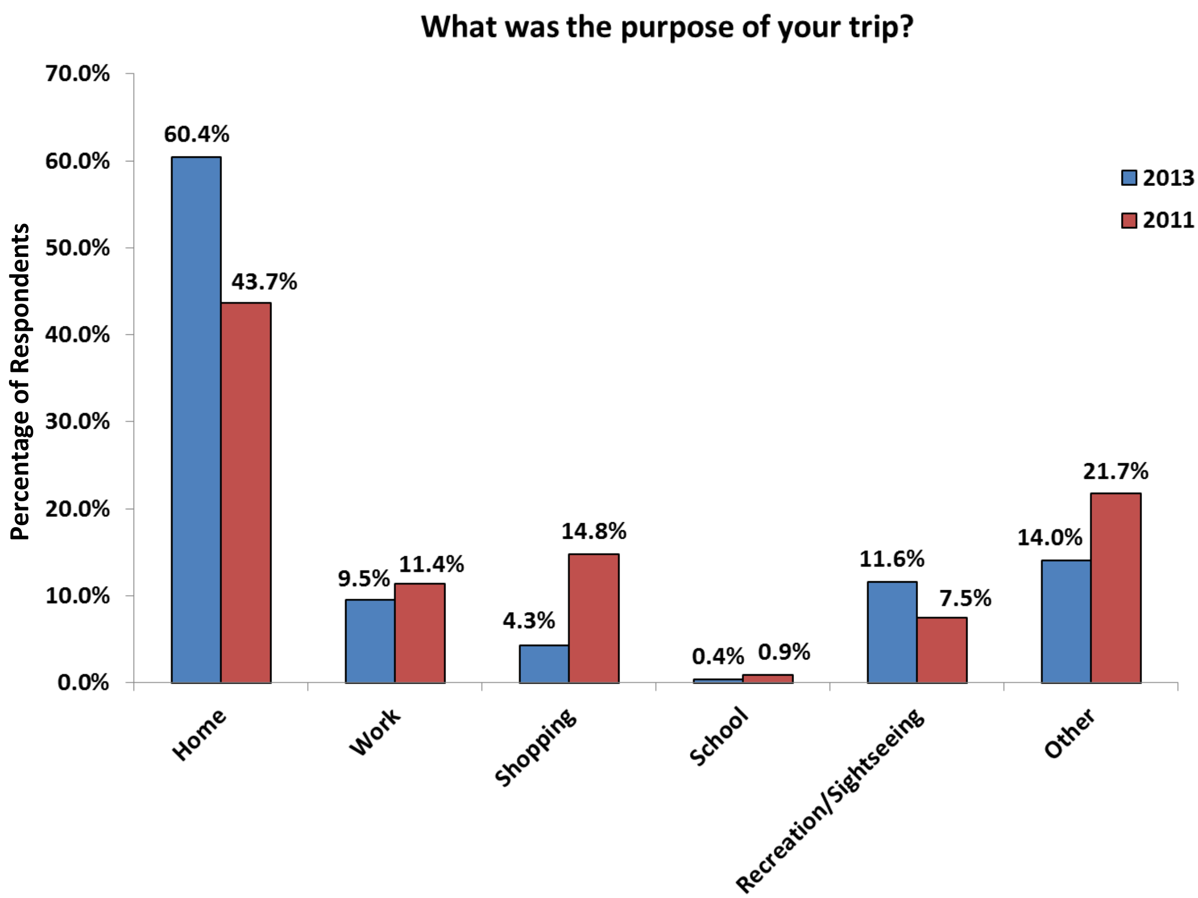


Table 3 – Purpose of Trip

What was the purpose of your trip?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Home	60.4%	835	43.7%	145
Work	9.5%	131	11.4%	38
Shopping	4.3%	59	14.8%	49
School	0.4%	5	0.9%	3
Recreation/ Sightseeing	11.6%	160	7.5%	25
Other	14.0%	193	21.7%	72
answered		**1383**		**332**
Skipped question		**113**		**17**

Figure and Table 3 highlight where passengers' one way ferry trips ended, which was used to infer their trip purpose. In both 2011 and 2013, 'Home' received the greatest number of responses. Respondents in 2013 were more likely to report 'Home' or 'Recreation/Sightseeing', and less likely to report 'Shopping', 'Work' or 'Other'.

This relationship suggests that 2013 respondents were perhaps more likely to be utilizing the ferry service for recreation and day-trips, which would be consistent with the more diverse group surveyed onboard and online in the summer of 2013 as compared to those surveyed in the winter of 2011.

Figure 4 – Other Forms of Transportation

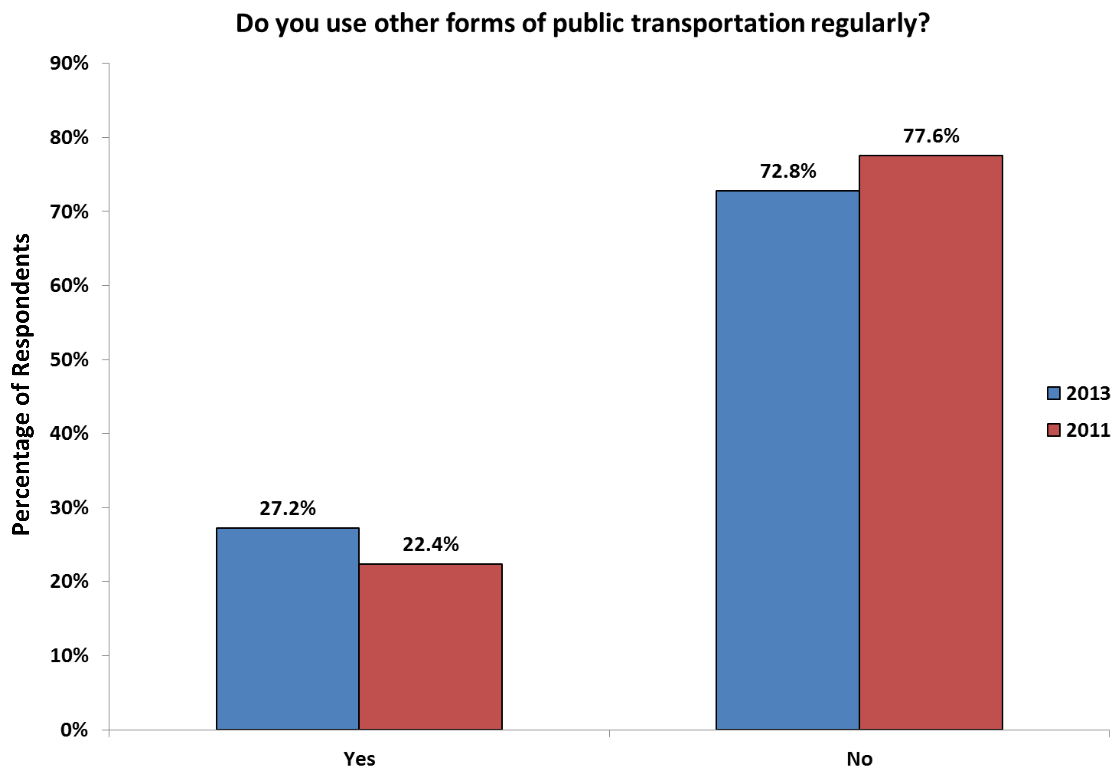


Table 4 – Other Forms of Transportation

Figure and Table 4 asks if respondents use public transportation regularly. Both years the majority of respondents reported they do not use other forms of public transportation regularly, suggesting that the ferry is their main mode of public transit.

Do you use other forms of public transportation regularly?	**2013**		**2011**	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Yes	27.2%	390	22.4%	77
No	72.8%	1044	77.6%	267
answered question		**1434**		**344**
skipped question		**62**		**5**

Figure 5 – Round Trips

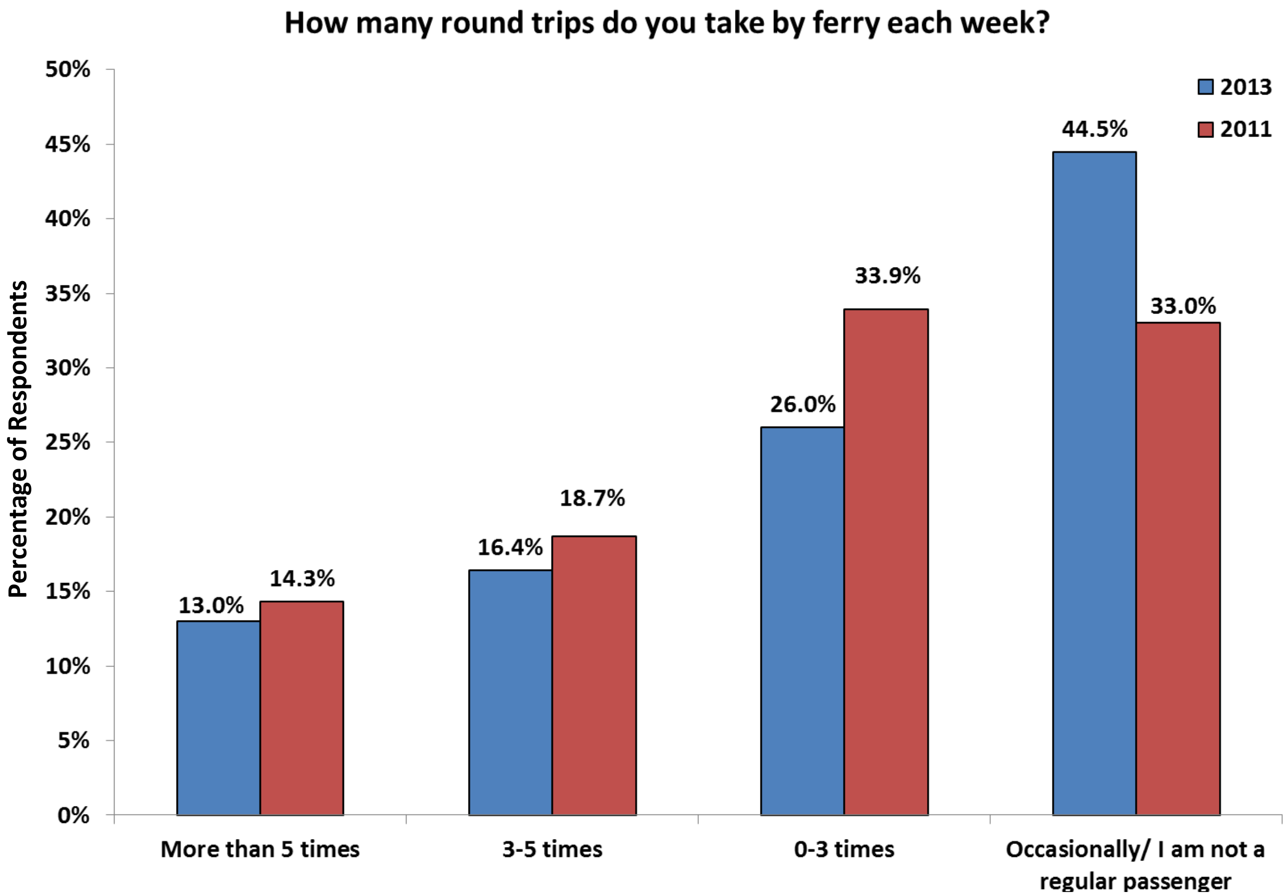


Table 5 – Round Trips

How many round trips do you take by ferry each week?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
More than 5 times	13.0%	183	14.3%	49
3-5 times	16.4%	230	18.7%	64
0-3 times	26.0%	365	33.9%	116
Occasionally/ I am not a regular passenger	44.5%	625	33.0%	113
answered question		**1403**		**342**
skipped question		**93**		**7**

Figure and Table 5 highlight how many round trips respondents take by ferry each week. Overall, respondents in 2011 reported using the ferry more frequently than those surveyed in 2013. There was also a considerable increase in those who said that they were not a regular passenger,

Again, these results suggest that 2013 respondents were perhaps more likely to be utilizing the ferry service for occasional recreation and tourism trips, which would be consistent with the more diverse group surveyed onboard and online in the summer of 2013 as compared to those surveyed in the winter of 2011.

Figure 6 – Days of the Week

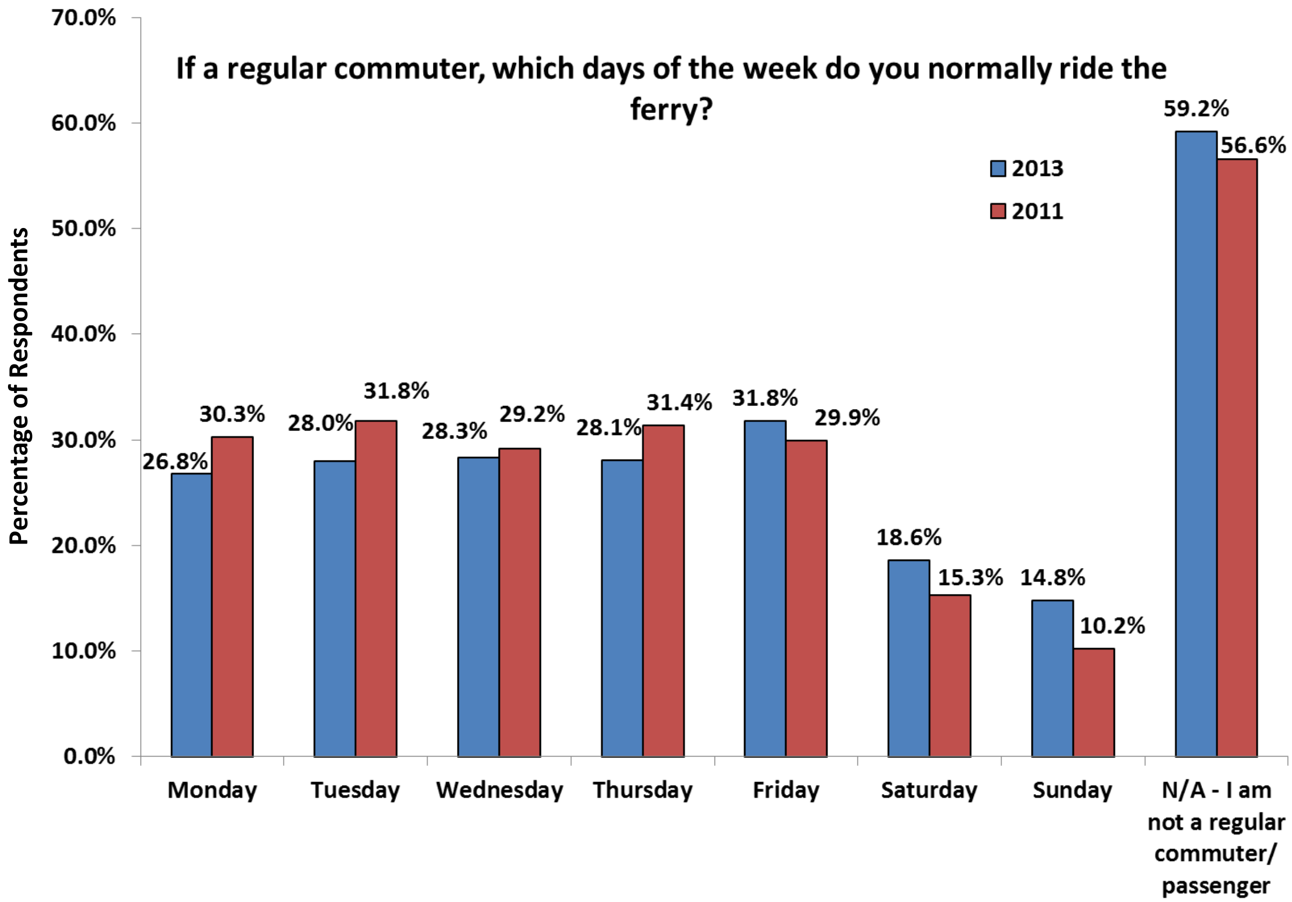


Table 6 – Days of the Week

Figure and Table 6 highlight the days that respondents said they normally ride the ferry. In both 2010 and 2013, more than half of respondents said that they were not regular commuters/passengers. However, of those that were, the Monday-Friday work week saw the greatest traffic, and Sunday saw the least.

If a regular commuter, which days of the week do you normally ride the ferry?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Monday	26.8%	305	30.3%	83
Tuesday	28.0%	319	31.8%	87
Wednesday	28.3%	323	29.2%	80
Thursday	28.1%	320	31.4%	86
Friday	31.8%	362	29.9%	82
Saturday	18.6%	212	15.3%	42
Sunday	14.8%	169	10.2%	28
not a regular commuter	59.2%	675	56.6%	155
answered		**1140**		**274**

Figure 7 – Age

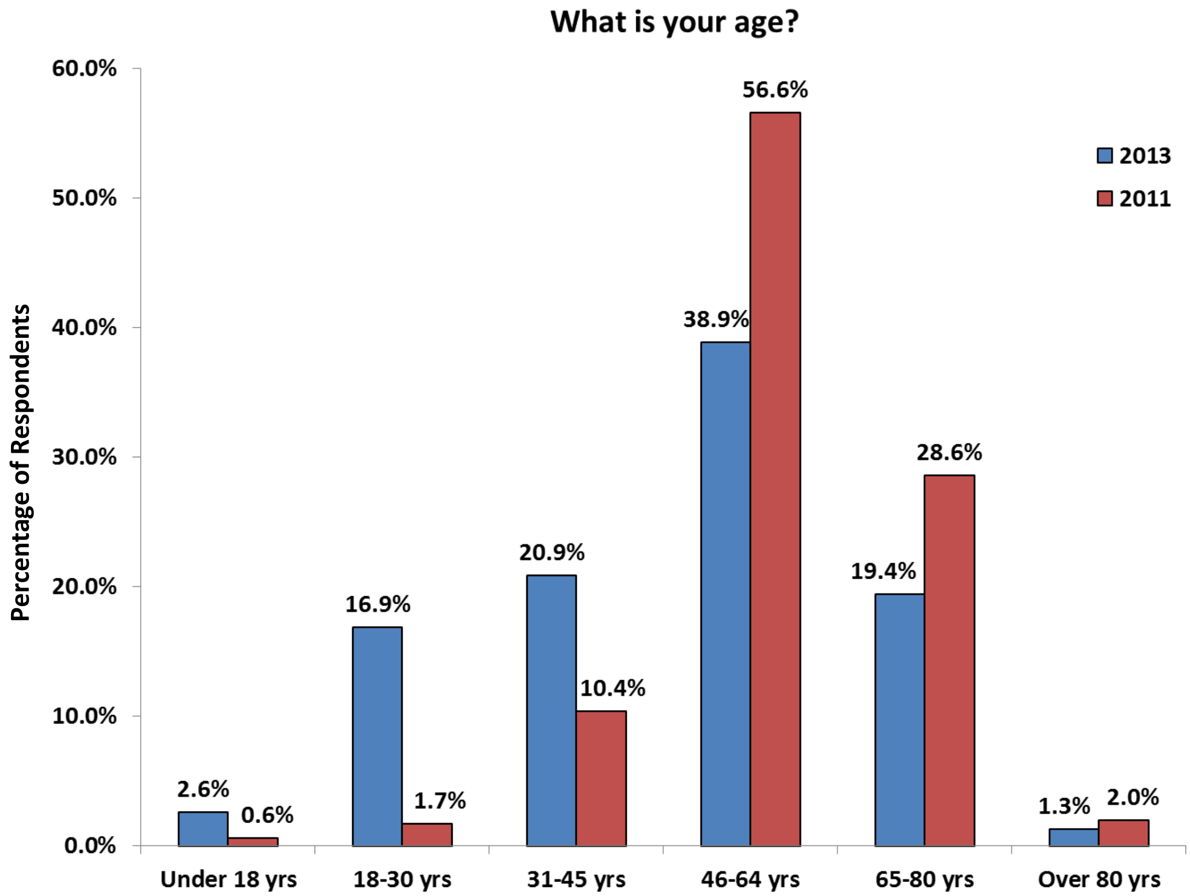


Table 7 – Age

What is your age?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Under 18 yrs	2.6%	36	0.6%	2
18-30 yrs	16.9%	236	1.7%	6
31-45 yrs	20.9%	291	10.4%	36
46-64 yrs	38.9%	542	56.6%	196
65-80 yrs	19.4%	270	28.6%	99
Over 80 yrs	1.3%	18	2.0%	7
answered question		**1393**		**346**
skipped question		**103**		**3**

Figure and Table 7 highlight the reported age of respondents. Overall, the 46-64 years of age group received the greatest amount of responses in both years (56.6% in 2011 and 38.9% in 2013), while Under 18 years and Over 80 years of age received the least number of responses.

Also noteworthy is the difference in age-distribution between survey years. Eight-four percent of respondents in 2011 fell within the range of 46-80 years of age, compared to just 58% in 2013. In contrast, younger passengers (45 years or younger) made up 40% of respondents in 2013, and only 13% in 2011. This difference may again be due in part to the fact that the 2011 surveying only solicited online responses from Casco Bay Lines' Interested Parties email list, as compared to the more diverse group surveyed onboard and online in 2013.

Figure 8 – Employment Status

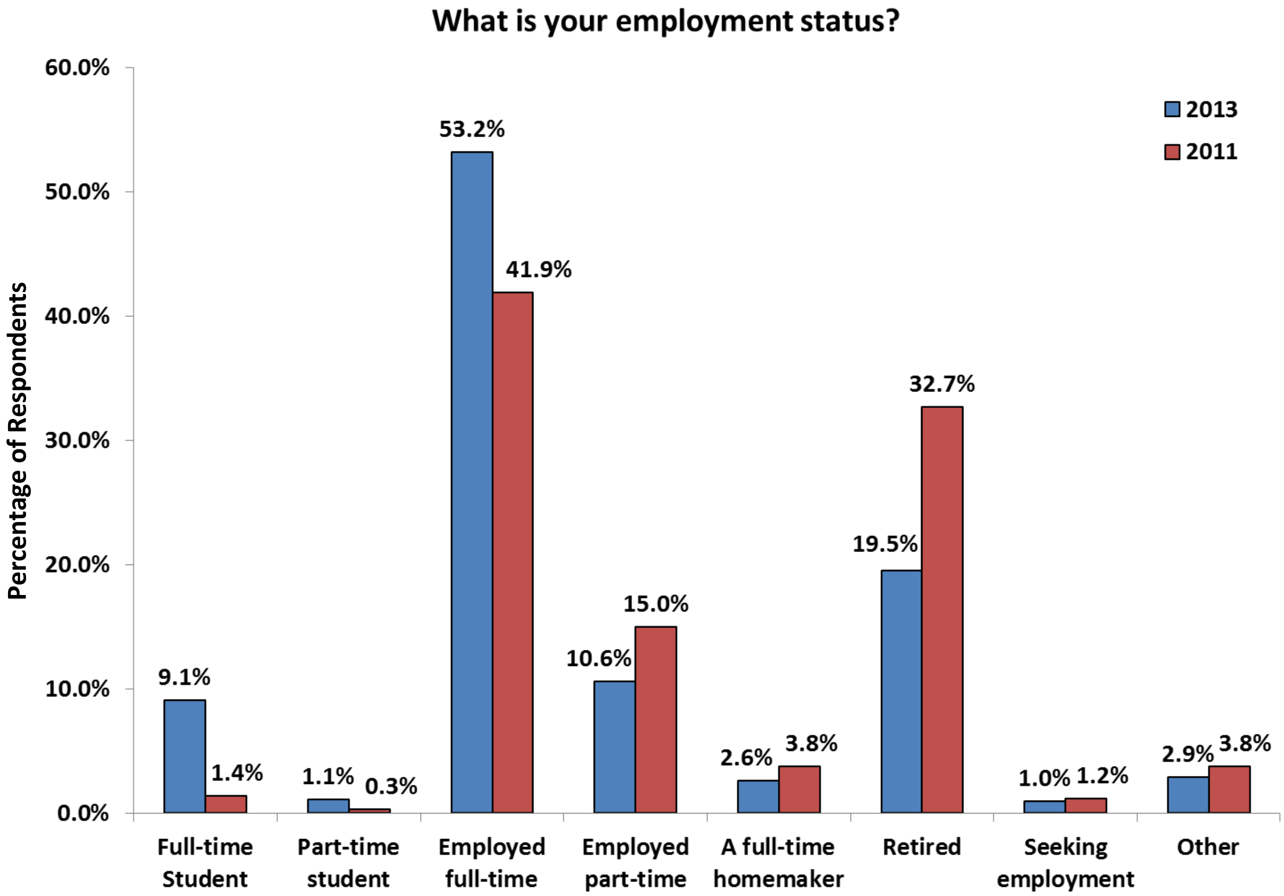


Table 8 – Employment Status

What is your employment status?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
Full-time Student	9.1%	127	1.4%	5
Part-time student	1.1%	15	0.3%	1
Employed full-time	53.2%	741	41.9%	145
Employed part-time	10.6%	148	15.0%	52
A full-time homemaker	2.6%	36	3.8%	13
Retired	19.5%	271	32.7%	113
Seeking employment	1.0%	14	1.2%	4
Other	2.9%	40	3.8%	13
answered question		**1392**		**346**
skipped question		**104**		**3**

Figure and Table 8 examine the employment status of passengers. Both the 2011 and 2013 surveys show that the single largest portion of respondents was employed full-time, with retirees making up the next largest group.

From 2011 to 2013 there was an increase in full-time students and workers and a decrease in retirees, part-time employees, and full-time homemakers. These changes may again be attributable in part to the fact that the 2011 surveying only solicited online responses from Casco Bay Lines' Interested Parties email list, as compared the more diverse group surveyed onboard and online in 2013.

Figure 9 – Income

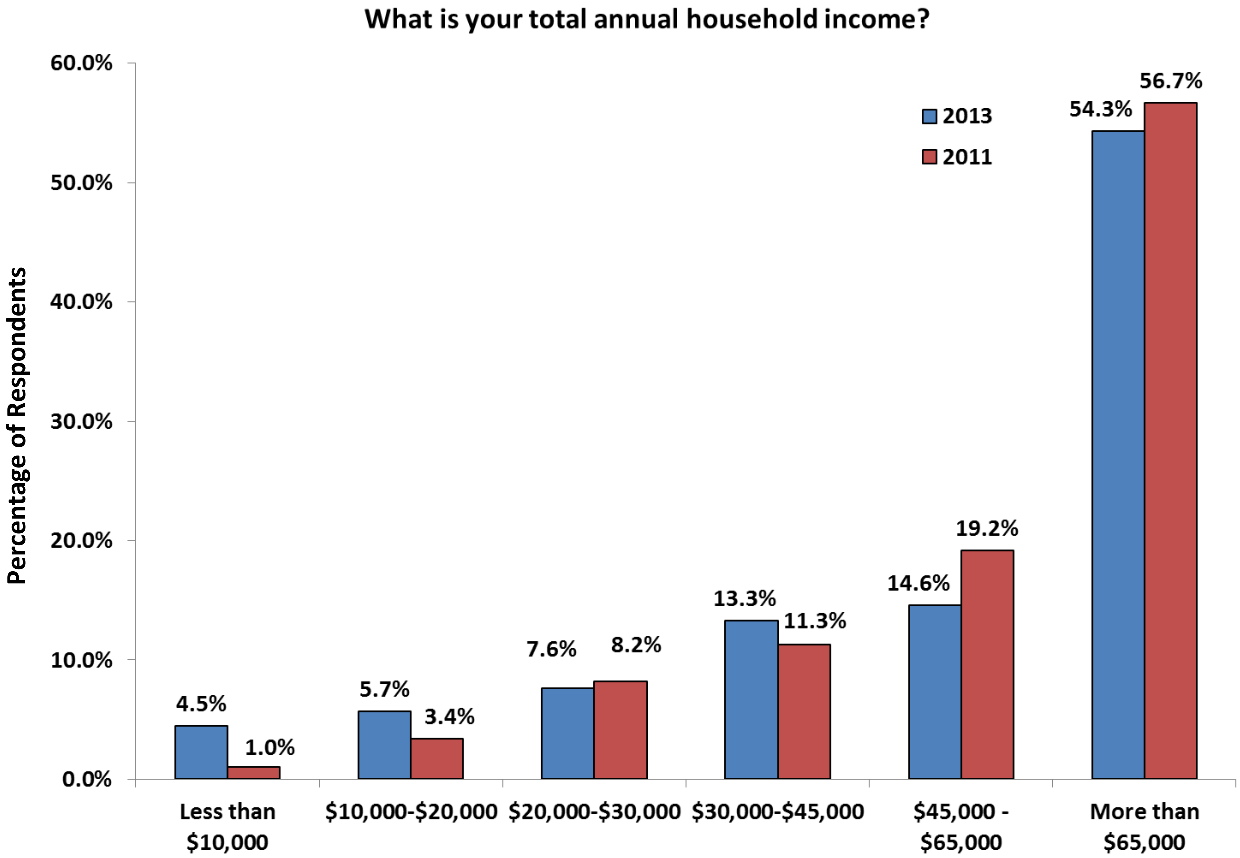


Table 9 – Income

What is your total annual household income?	2013		2011	
Answer Options	**Response Percent**	**Response Count**	**Response Percent**	**Response Count**
<$10,000	4.5%	55	1.0%	3
$10,000-$20,000	5.7%	70	3.4%	10
$20,000-$30,000	7.6%	94	8.2%	24
$30,000-$45,000	13.3%	164	11.3%	33
$45,000 -$65,000	14.6%	180	19.2%	56
>$65,000	54.3%	670	56.7%	165
answered question		**1233**		**291**
skipped question		**263**		**58**

Figure and Table 9 examine the total annual household income of respondents. For both 2011 and 2013 respondents, over half have a total income greater than $65,000, while the least represented were those earning less than $10,000.

Approximately one-third of 2013 respondents (and one-quarter of 2011 respondents) reported an annual household income that was below the median household income of $57,461/year in Cumberland County (US Census Bureau, 2009-2013 American Community Survey). This indicates that, unlike other forms of public transit in Greater Portland, ferry passengers seem to generally have higher income.

Figures 10, 11 and Table 10 – Satisfaction and Importance Ratings

As part of these surveys, respondents were asked to rate their satisfaction with numerous attributes of the service, on a four-point scale from Poor to Excellent. Respondents were then asked in the following question to select the service attribute which they felt was Most Important.

The results from these questions are displayed in the figures below, and in the following table. The percentages reported for Satisfaction represent the sum of those respondents who rated the attribute as either Excellent or Good. The percentages for Importance represent the sum of those respondents who rated the category as Most Important.

The Priority Index (PI) converts the Satisfaction and Importance percentages into a composite score that more clearly identifies the service attributes that are both High Importance and Low Satisfaction. The higher the PI value for a particular service attribute, the greater the discrepancy between the importance of that attribute to the respondents, and their satisfaction with it.

Figure 10 – 2013 Satisfaction and Importance of Service Attributes, and Resulting Priority Index

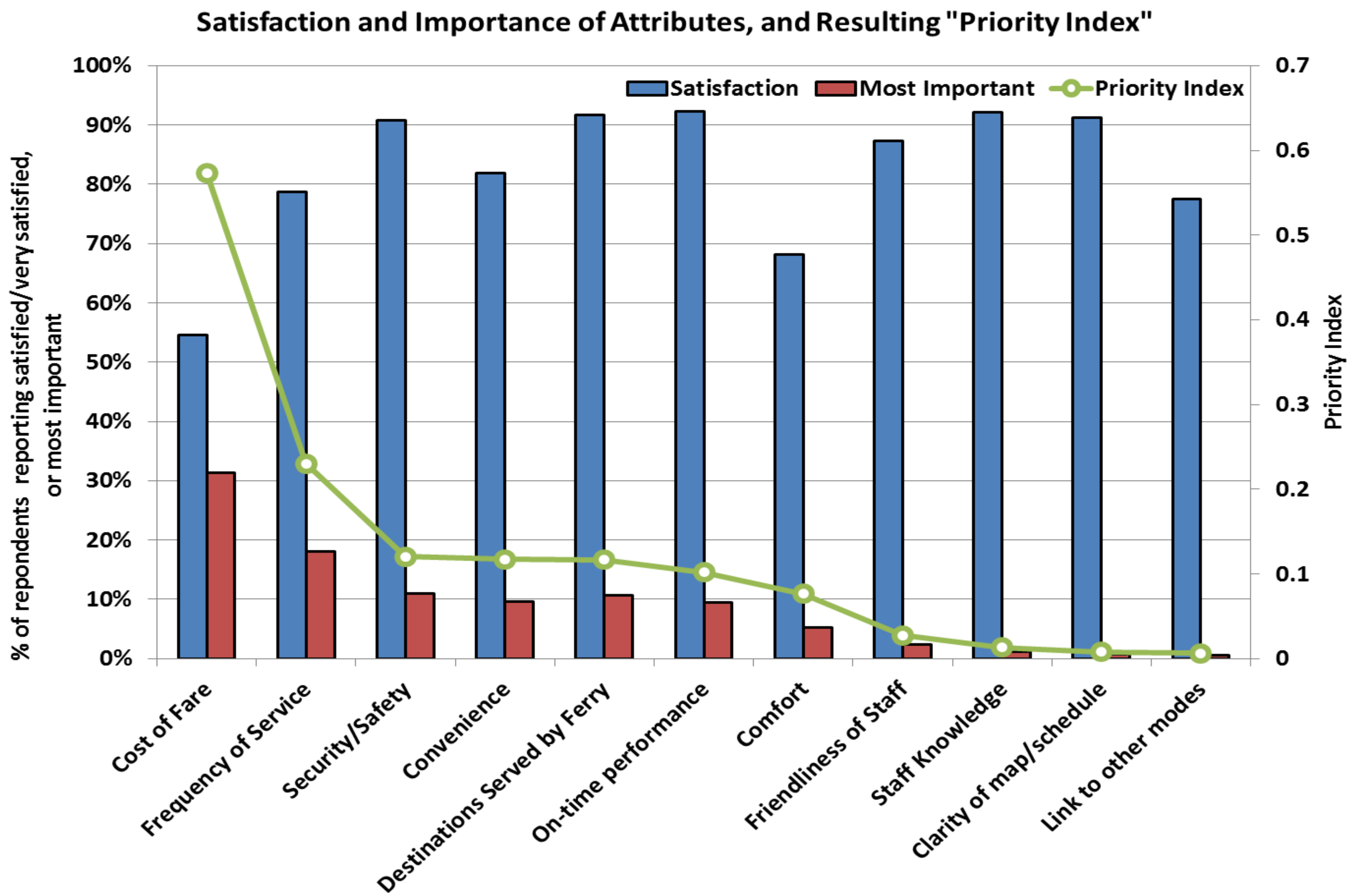
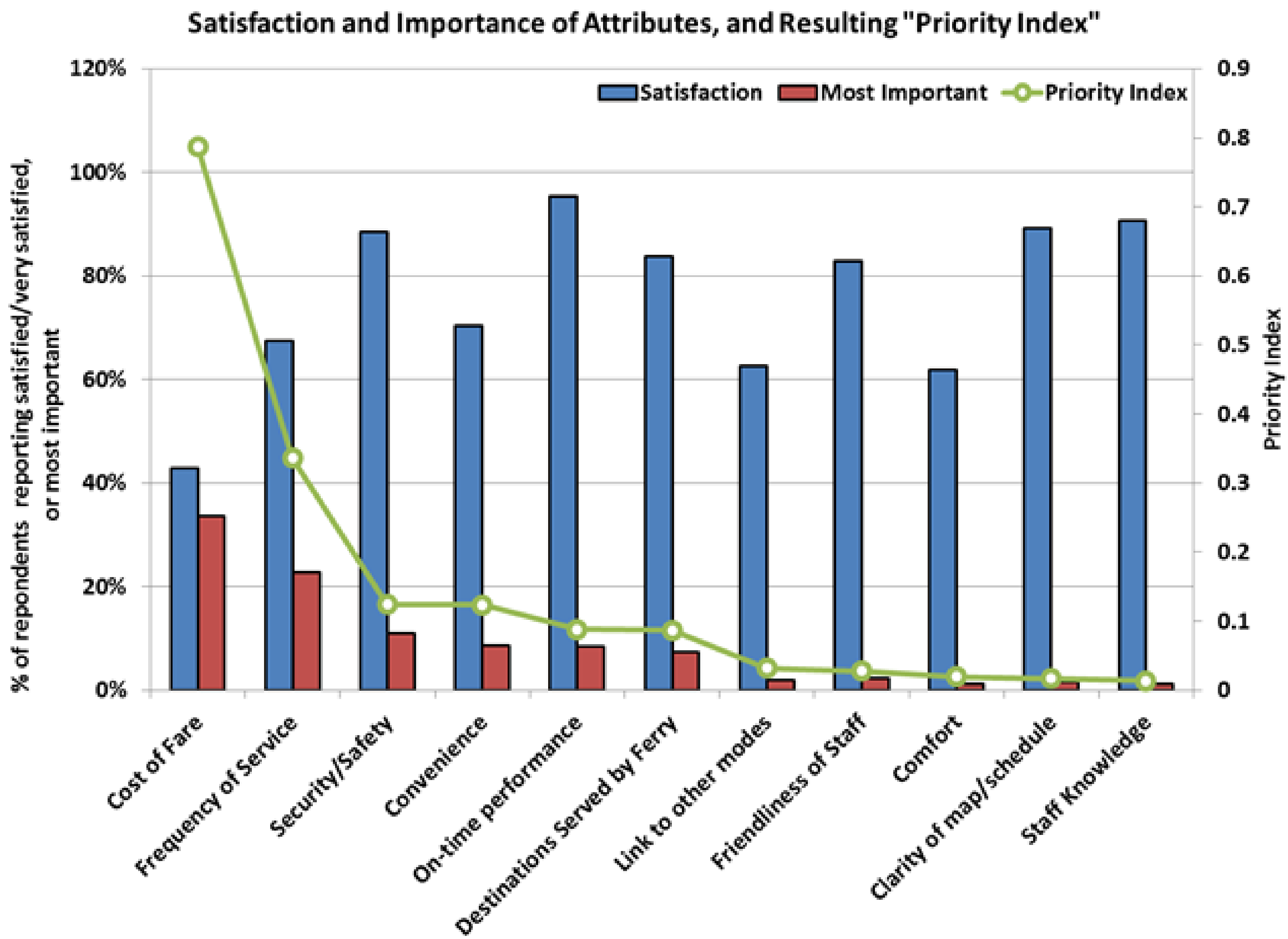


Figure 11 – 2011 Satisfaction and Importance of Service Attributes, and Resulting Priority Index



<u>Table 10 – Satisfaction and Importance of Service Attributes, and Resulting Priority Index</u>

	2013			2011		
Category	**Satisfaction**	**Most Important**	**Priority Index**	**Satisfaction**	**Most Important**	**Priority Index**
Cost of Fare	55%	31%	0.57	43%	34%	0.79
Frequency of Service	79%	18%	0.23	68%	23%	0.34
Security/Safety	91%	11%	0.12	89%	11%	0.12
Convenience	82%	10%	0.12	70%	9%	0.12
Destinations Served by Ferry	92%	11%	0.12	84%	7%	0.09
On-time performance	92%	9%	0.10	95%	8%	0.09
Comfort	68%	5%	0.08	62%	1%	0.02
Friendliness of Staff	87%	2%	0.03	83%	2%	0.03
Staff Knowledge	92%	1%	0.01	91%	1%	0.01
Clarity of map/schedule	91%	1%	0.01	89%	2%	0.02
Link to other modes	77%	1%	0.01	63%	2%	0.03

The figures and table above compare respondents' ranking of service attributes, and rate their satisfaction with them. Note that while respondents were asked to rate their satisfaction with <u>every</u> service attribute individually, they were only asked to identify a <u>single</u> attribute as Most Important. As a result, the Most Importance percentages for each attribute are notably lower in most cases than the corresponding Satisfaction percentages.

In both 2011 and 2013, 'Cost of Fare' was consistently ranked as the most important attribute, while simultaneously ranked lowest in terms of passenger satisfaction. Consequently, its Priority Index rating was highest among all attributes, with a composite score of 0.79 in 2011, and 0.57 in 2013. Passenger satisfaction with 'Cost of Fare' did improve from 43% in 2011 to 55% in 2013 (as demonstrated by the corresponding drop in PI). However, it is not clear if this improvement is due primarily to changes in passenger perceptions/experience, or whether the more diverse group surveyed onboard and online in 2013 as compared to 2011 may have played a role.

Similarly, 'Frequency of Service' was ranked as the second-most important attribute in 2011 and 2013, and ranked among the lowest in terms of passenger satisfaction. Its PI rating was second highest, improving from a composite score of 0.34 in 2011, to 0.23 in 2013 as satisfaction increased from 68% to 79%. Again, the specific reasons for this change from 2011 to 2013 remain unclear.

Attributes with PI's in the moderate-range include 'Security and Safety' (0.12), 'Convenience' (0.12), 'Destinations Served' (0.09-0.12) 'On-Time Performance' (0.09-0.10), and 'Comfort' (0.02-0.08). Aside from the 'Comfort' attribute (which increased in Importance ranking considerably in 2013), these values did not change notably from 2011 to 2013.

The remaining attributes ('Friendliness of Staff', 'Staff Knowledge', 'Clarity of Map/Schedule', and 'Links to Other Modes') were all highly ranked in terms of passenger satisfaction, and ranked relatively low in terms of importance. As a result, their PI scores were the lowest of all attributes evaluated (0.01-0.03).

2013 Respondent Comments – Summary of Themes

In addition to the survey questions listed above, there were also two main “open-ended” questions at the end of the survey which asked respondents to write in their own responses. These two questions are listed below, with the number of responses received for each question in parentheses.

At the request of staff from Casco Bay Lines, these comments have been reviewed, organized and condensed by GPCOG staff in order to identify common responses and overall trends. Below, please find brief summaries of the over sixteen-hundred comments received to these two questions from Casco Bay Lines passengers.

Since some respondents did not have time to complete the survey before disembarking, or chose to skip a question that did not apply to them, the total number of responses varies somewhat from question to question.

Most Needed Improvements?

24. **What is the single most important improvement Casco Bay Lines could make? (1005 responses)**

    Passengers who included comments for this section expressed sentiments for improvements in a variety of areas. Specifically, 157 passengers responded that they would like the cost of fare to be lowered, 78 passengers expressed interest in discounted rates for island resident s and commuters, and seven passengers said they would like the cost of having a bike on board to be lowered.

    In terms of cleanliness and comfort , 36 respondents said the bathrooms needs to be cleaner, 19 said the ferries overall need to be cleaner, 44 said they would like to see more comfortable seating, and five would like for the ferries and ferry terminal to be more handicap accessible.

    Fifty-seven respondents would like a year round full schedule, and 14 said they would like the clarity of the ferry schedule to improve at both the terminal and on the Casco Bay Lines Website. In terms of parking, 31 respondent s said there needs to be more parking availability at the terminal, seven expressed that the cost of parking needs to be lowered, and three said there should be priority parking for island residents.

    In terms of amenities, 30 respondents would like to see the ferries offer food and drink services on the ferry, and eight expressed that the sound system on the ferries needs to improve as it is difficult for them to hear clearly what is being said.

Additional Comments

25. Please make any additional comments you may have about Casco Bay Lines in the space below (649 responses)

Many passengers took advantage of the additional comments section. Of those who did, 127 respondents expressed their gratitude to Casco Bay Lines, as well as their praise for the wonderful service. Twenty-six respondents said that the overall trip was a very pleasant experience.

In terms of customer service, 55 respondents said that the staff and crew are very friendly and approachable, while 16 respondents said that the staff and crew were unfriendly and not approachable.

Under cleanliness, 18 respondents said that the toilet needs to be cleaner. Under the fares section, 12 respondents would like to see the Wednesday car fare reduction continue, and eight said that Casco Bay Lines needs to provide an opportunity for customers to purchase a yearly pass at a discounted rate for down bay service.