



Ferry Passenger Survey

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Caledonian MacBrayne Ferry Passenger Monitor

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The independent transport user watchdog

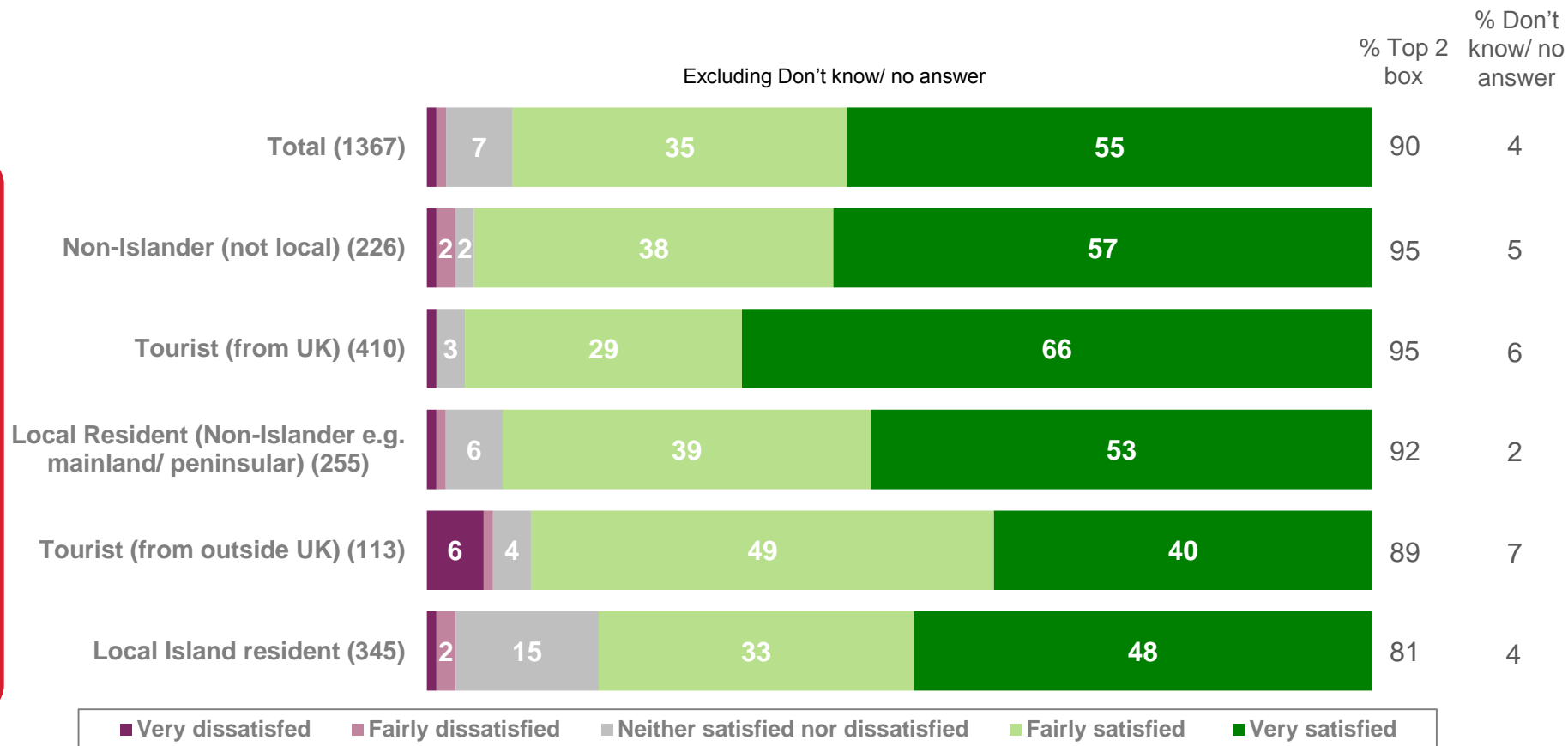
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Introduction

- This presentation examines key findings from the first Customer Satisfaction Survey which took place during May 2015
- Fieldwork took place 11th – 24th May 2015. 31 shifts were undertaken covering 13 different ferry crossings. Future Thinking has been responsible for all fieldwork, data processing and reporting
- A total of 1,443 questionnaires were completed in total. For longer crossings (20 minutes+) questionnaires were handed out and collected by field agents on-board ferries. For short crossings of 5 minutes, questionnaires were handed out by agents at the ports with pre-paid return envelopes enabling them to complete and return later on
- Data has been weighted to match the passenger loading profiles for May according to each route
- This presentation draws some key findings from the data and should act as a starting point for further investigations
- There is a lot of data to use! This presentation is not the end of the process. Other data inquiries are welcome after today's meeting

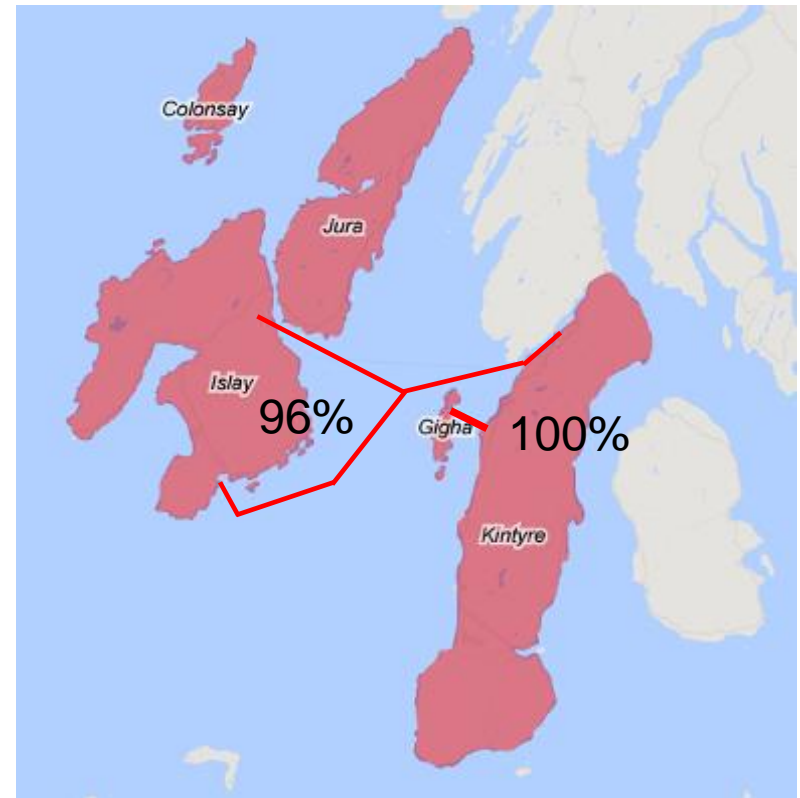
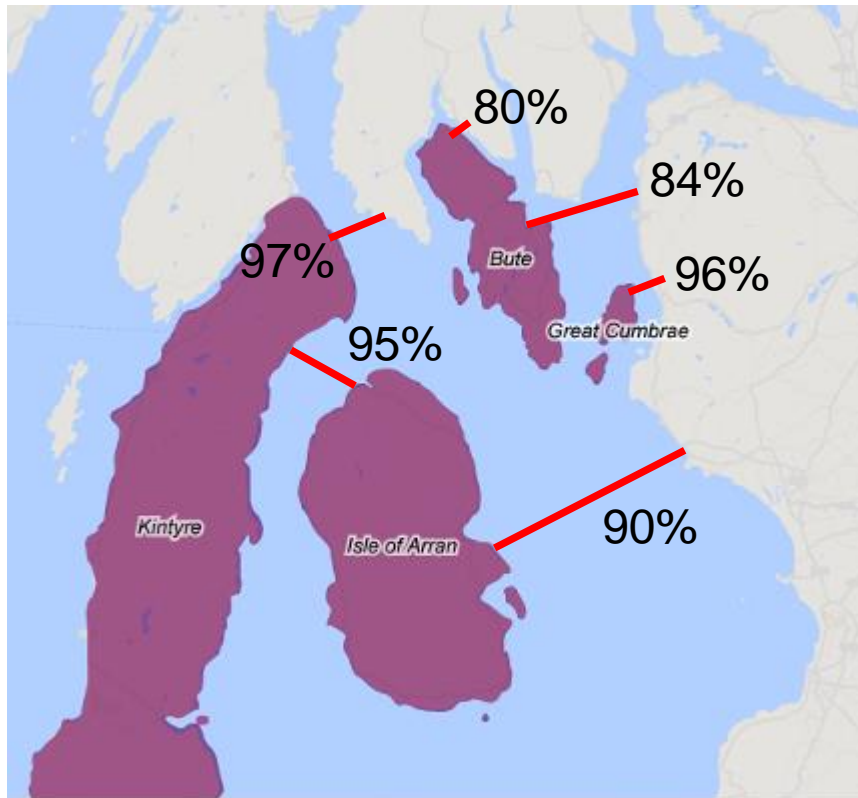
‘Overall satisfaction with journey’



- Overall journey satisfaction is positive with non-Islander residents and UK tourists
- Local Island residents slightly less inclined to rate as positively
- Some negativity (7% very/ fairly dissatisfied) is noted among tourists from overseas

‘Overall satisfaction with journey’ (II)

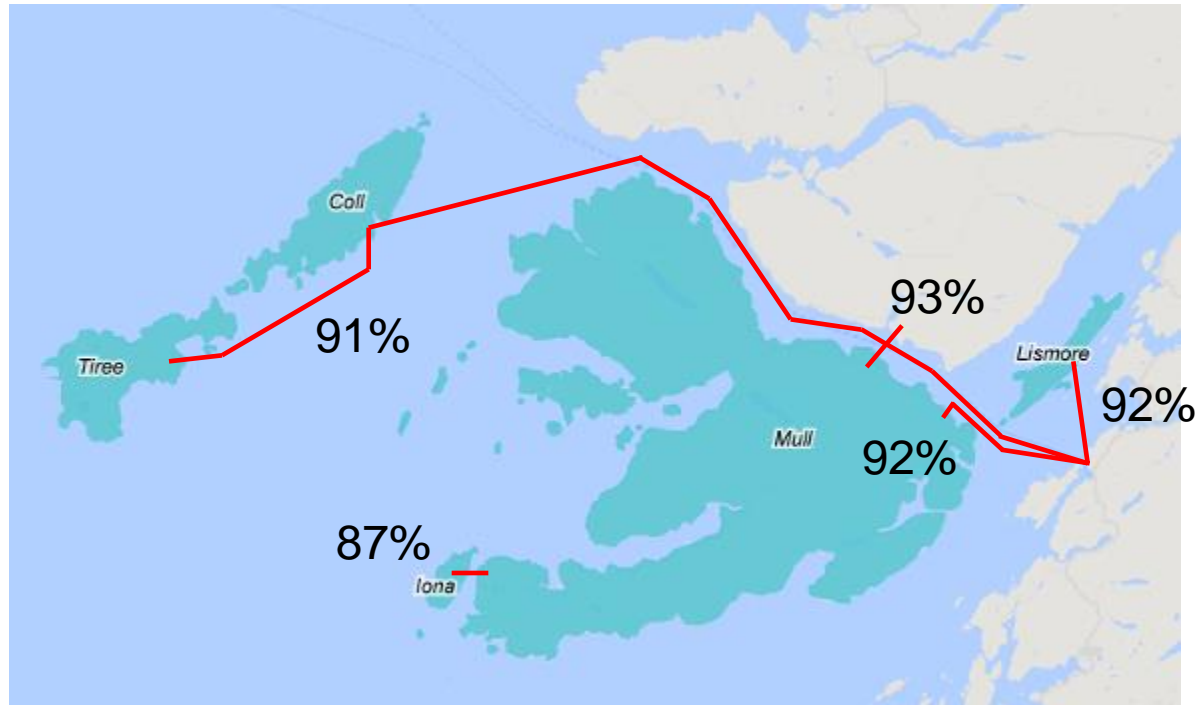
Excluding Don't know/ no answer



- Overall satisfaction is positive on a mix of longer/ shorter sailings
- Overall satisfaction levels on Rhubodach – Colintraive are lower
- The busy Wemyss Bay – Rothesay crossing also has notably lower satisfaction levels

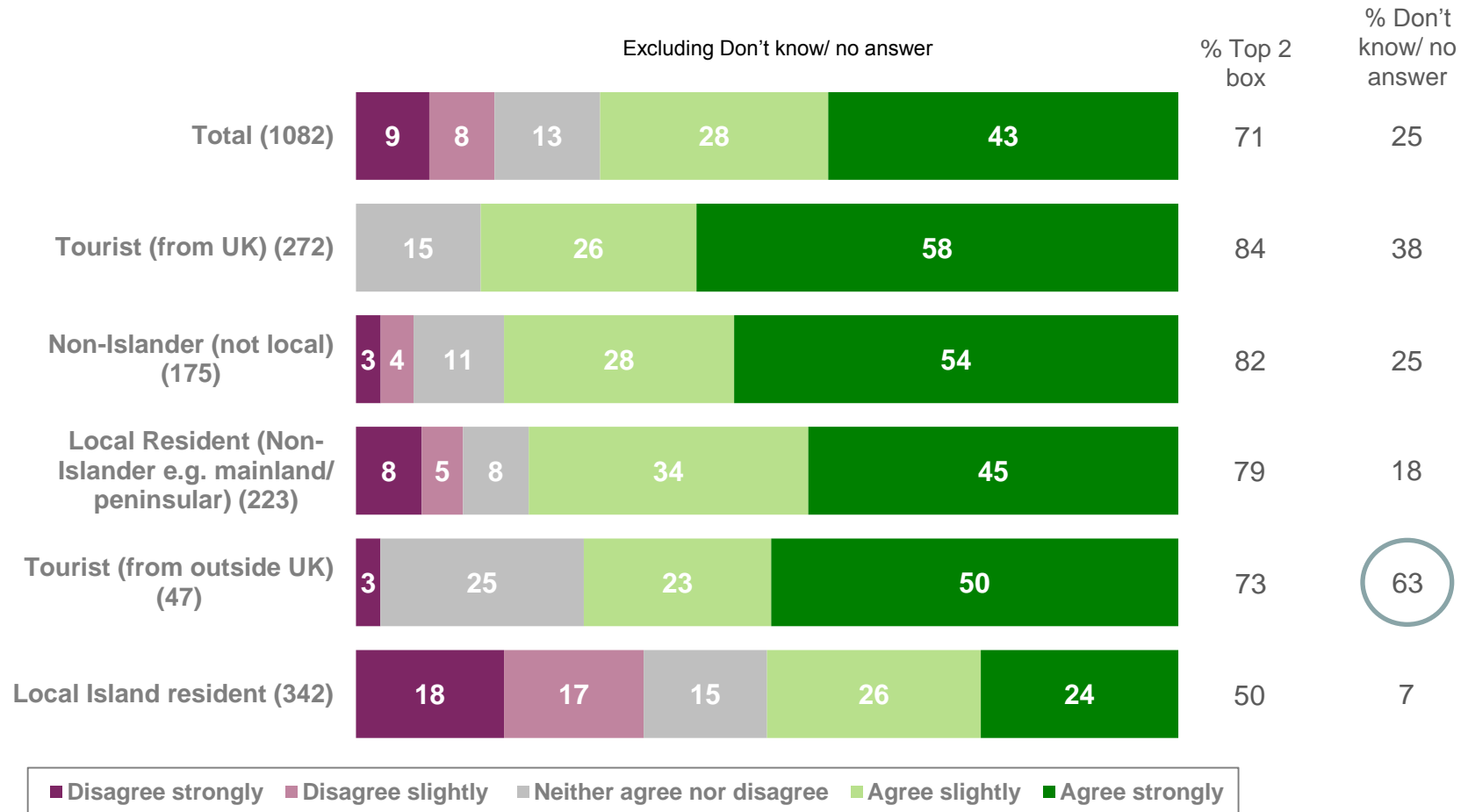
‘Overall satisfaction with journey’ (III)

Excluding Don't know/ no answer



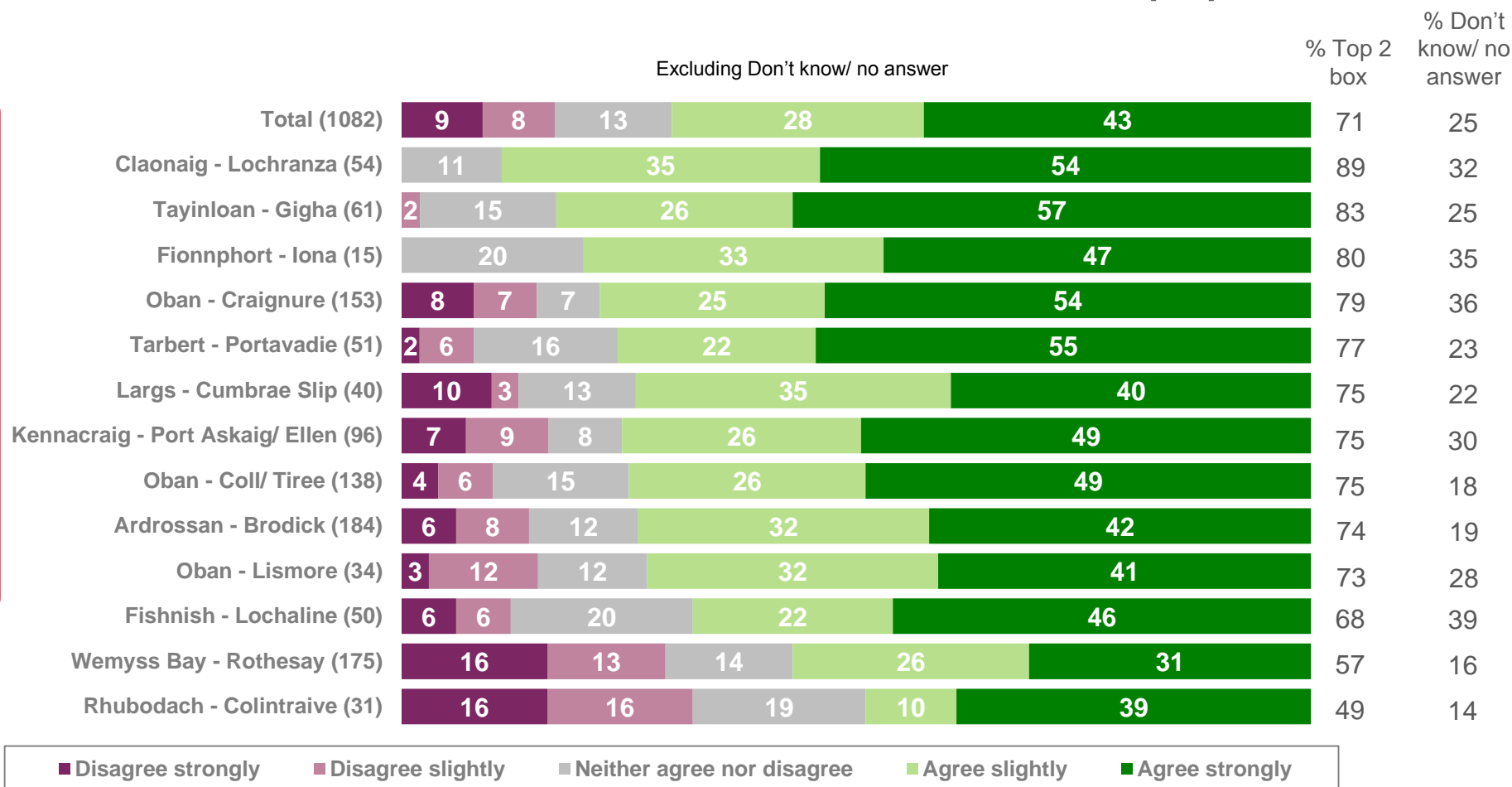
- Very positive performances in general
- Fionnphort – Lona passengers slightly less inclined to rate as highly as elsewhere

‘CalMac understands its role as a ‘Lifeline’ to island communities’ (I)

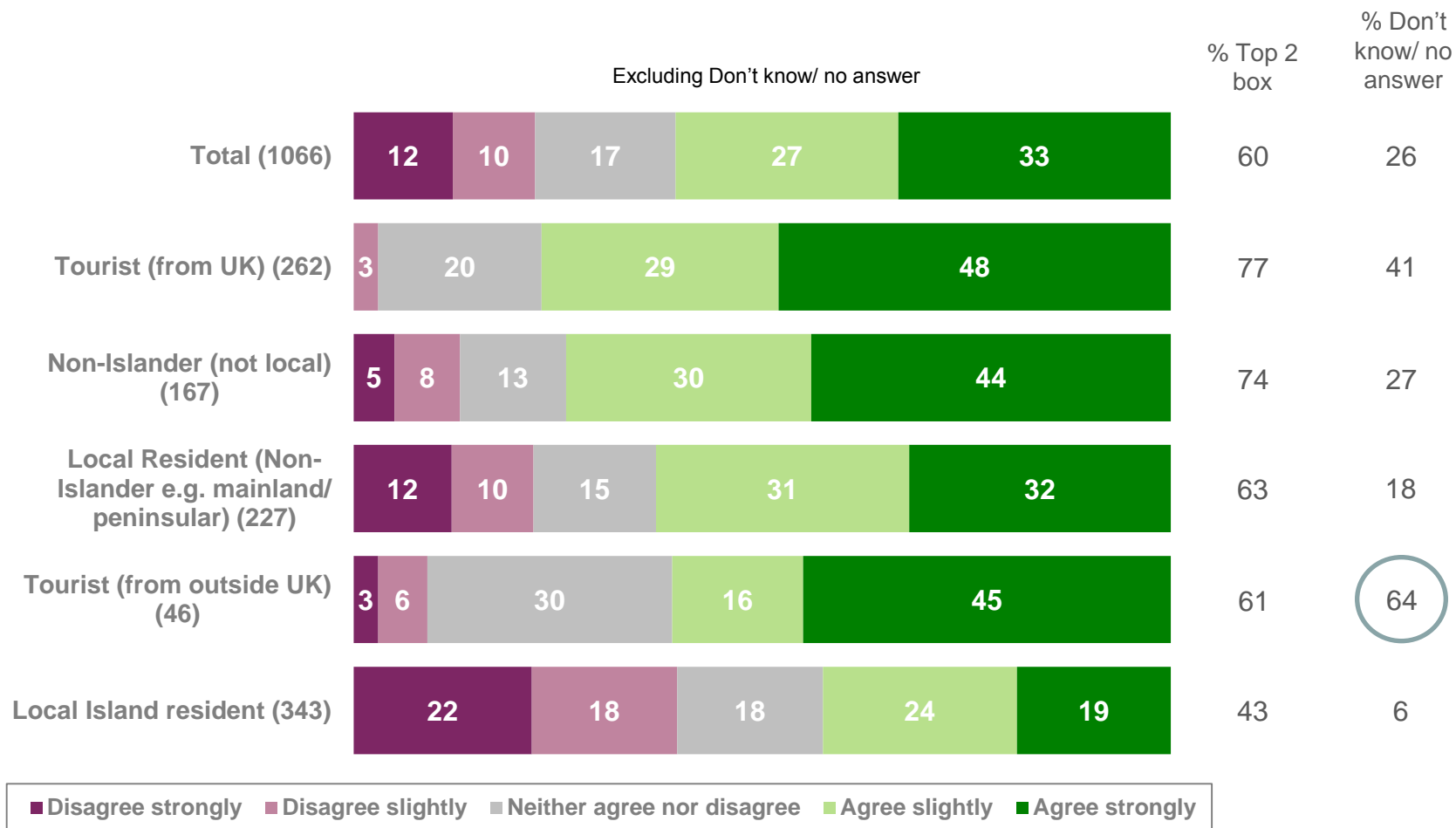


‘CalMac understands its role as a ‘Lifeline’ to island communities’ (II)

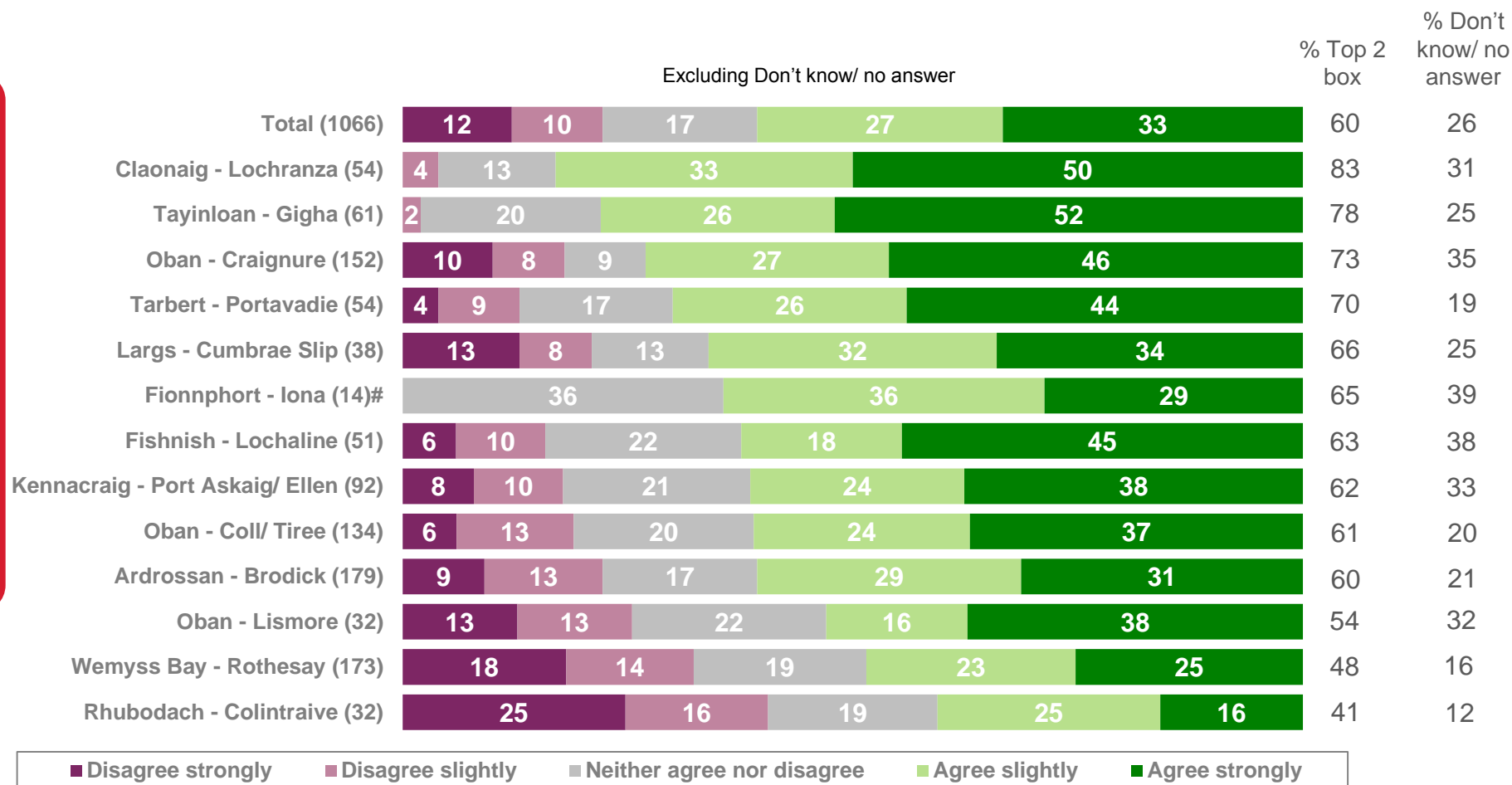
Excluding Don't know/ no answer



‘I believe CalMac acts in the best interests of island communities’ (I)

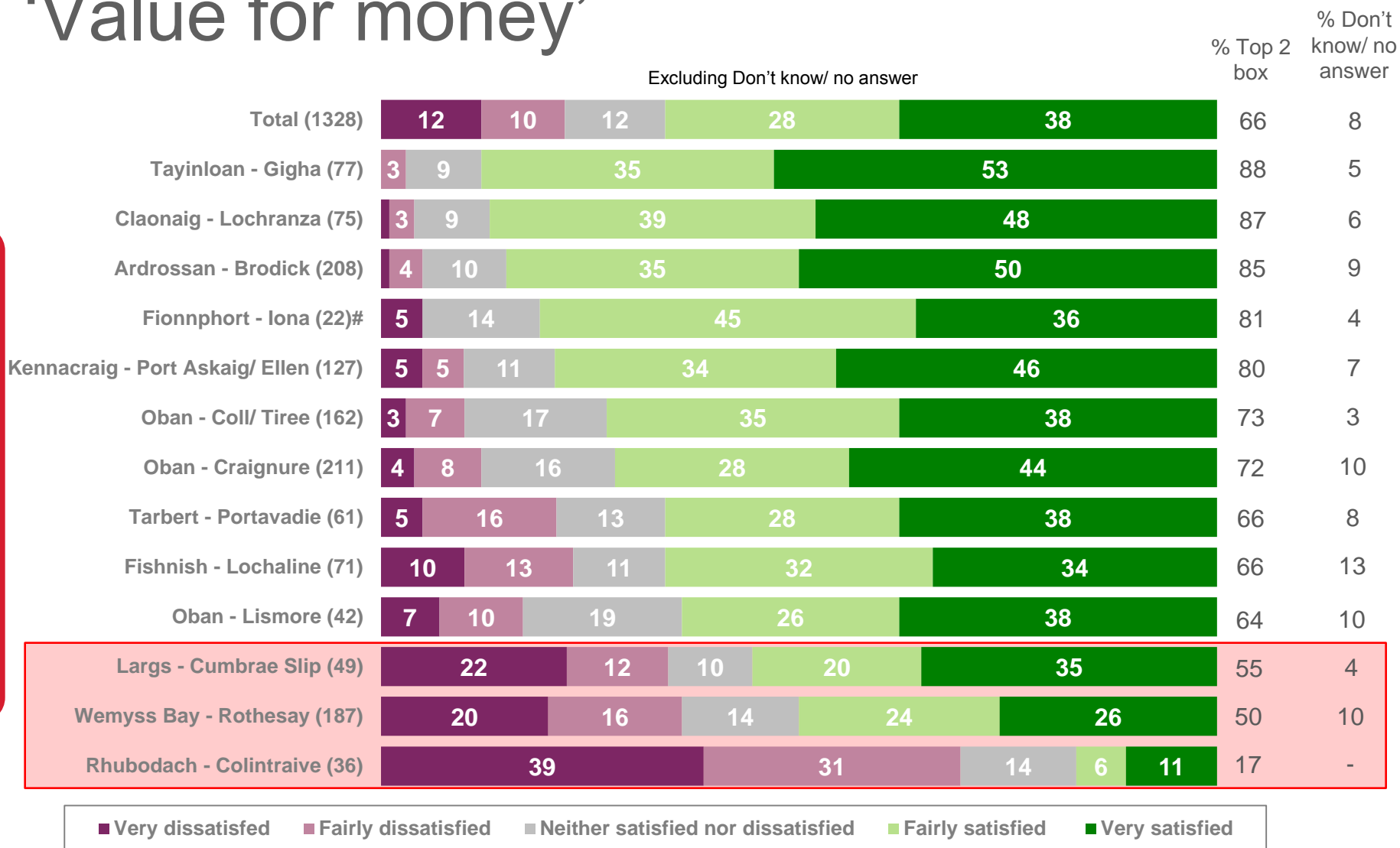


‘I believe CalMac acts in the best interests of island communities’ (II)



Caution: Low base size

'Value for money'



- Value for money is clearly more of an issue on three routes in particular

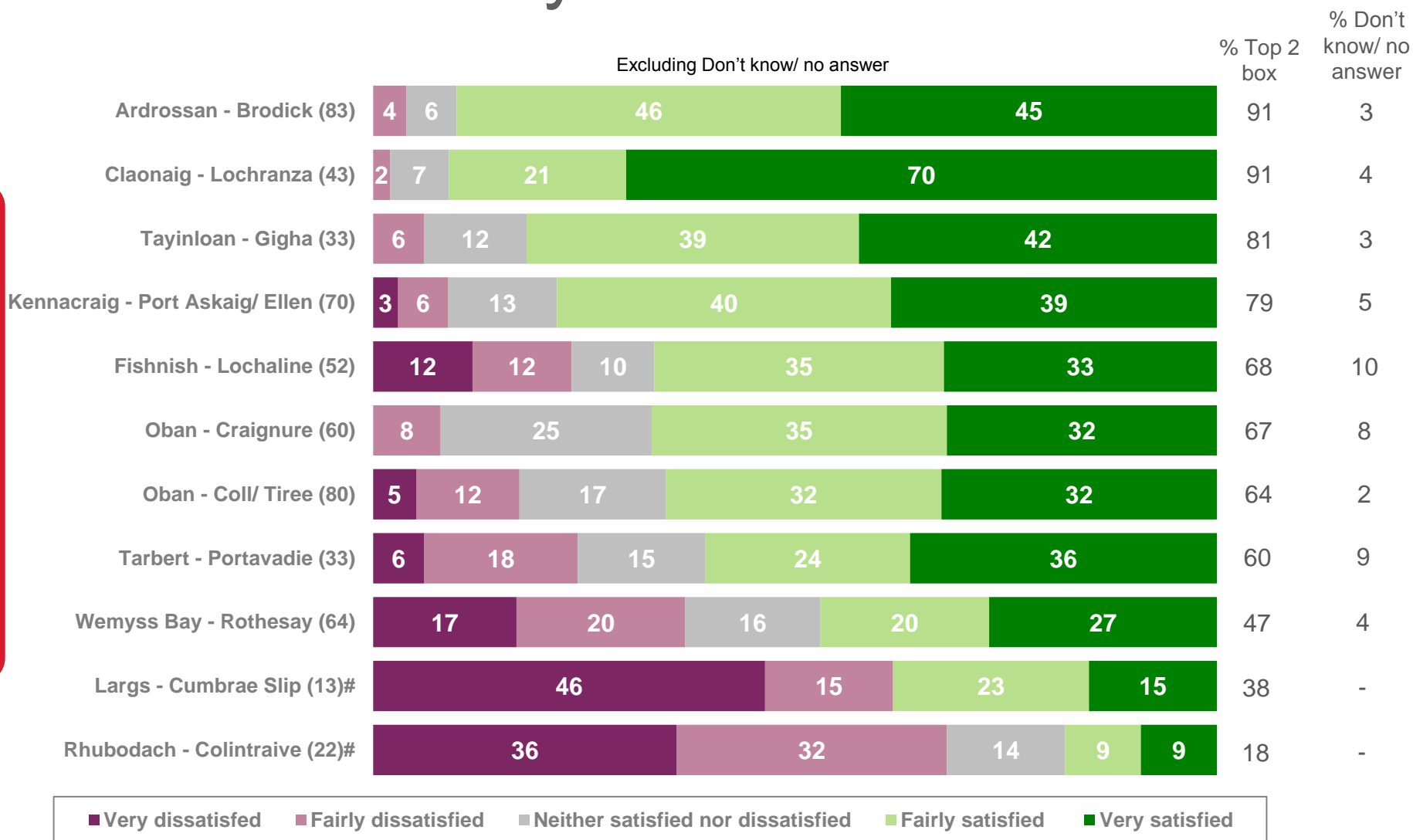
'Value for money'

<div>●</div> Route with RET <div>●</div> Route without RET	'VFM'	Crossing time (Minutes)	Single (foot)	Return (foot)	Car (single)	Car (return)
● Tayinloan – Gigha	88%	20	£2.50	£5.00	£7.35	£14.70
● Claonaig – Lochranza	87%	30	£2.80	£5.60	£9.40	£18.80
● Ardrossan – Brodick	85%	55	£3.75	£7.50	£15.10	£30.20
● Fionnphort – Iona	81%	10		£5.20		
● Kennacraig – Port Askaig/ Port Ellen	80%	145	£6.50	£13	£32.50	£65
● Oban – Coll/ Tiree	73%	260 + 55	£10.30	£20.60	£56	£112
● Oban – Craignure	72%	45	£5.65	£9.45*	£51	£69*
● Portavadie – Tarbert	66%	25	£4.40	£7.35*	£19.30	£33.50*
● Oban – Lismore	64%	55	£4.10	£6.70*	£33	£56*
● Lochaline – Fishnish	66%	20	£3.35	£5.75*	£14.70	£24.90*
● Largs – Cumbrae Slip	55%	10		£5.65		£20.55
● Wemyss Bay – Rothesay	50%	35	£5.15	£8.75*	£20.15	£35*
● Colintrave – Rhubodach	17%	5	£1.65	£2.90	£10.05	£17.25

RET – 'Road Equivalent Tariff' is a distance based fares structure, which underpins the Scottish Government's commitment to providing one single overarching fares policy across Scotland's entire ferry network. The RET formula for calculating fares is a combination of a fixed element (to ensure services remain sustainable and to cover fixed costs such as maintaining harbour infrastructure and vessels) and a rate per mile (calculated by analysts using contemporary independent research by RAC).

*5 day saver return

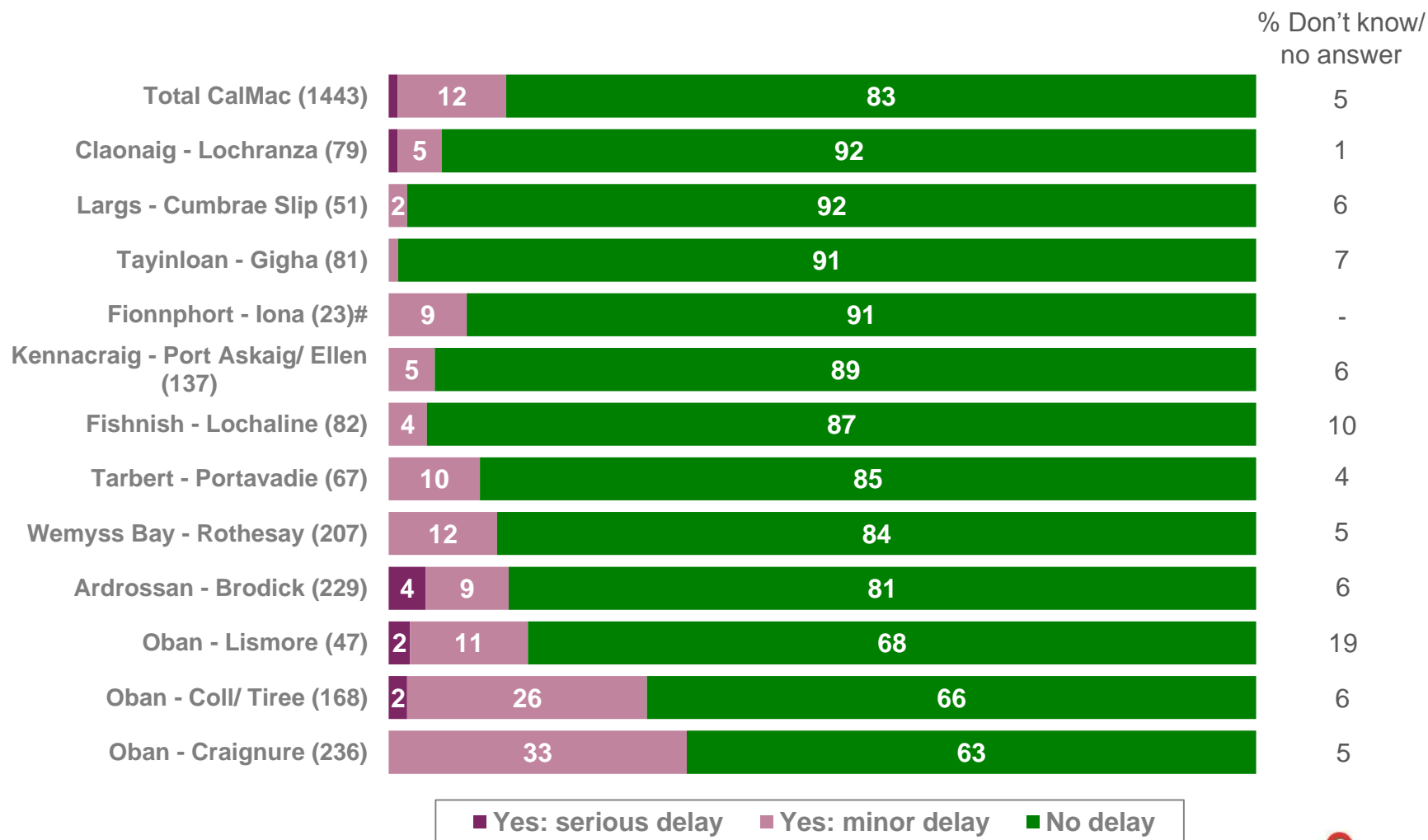
‘Value for money’ – car users



Caution: Low base size

Chart excludes Fionnphort – Iona & Oban – Lismore because of very low base sizes

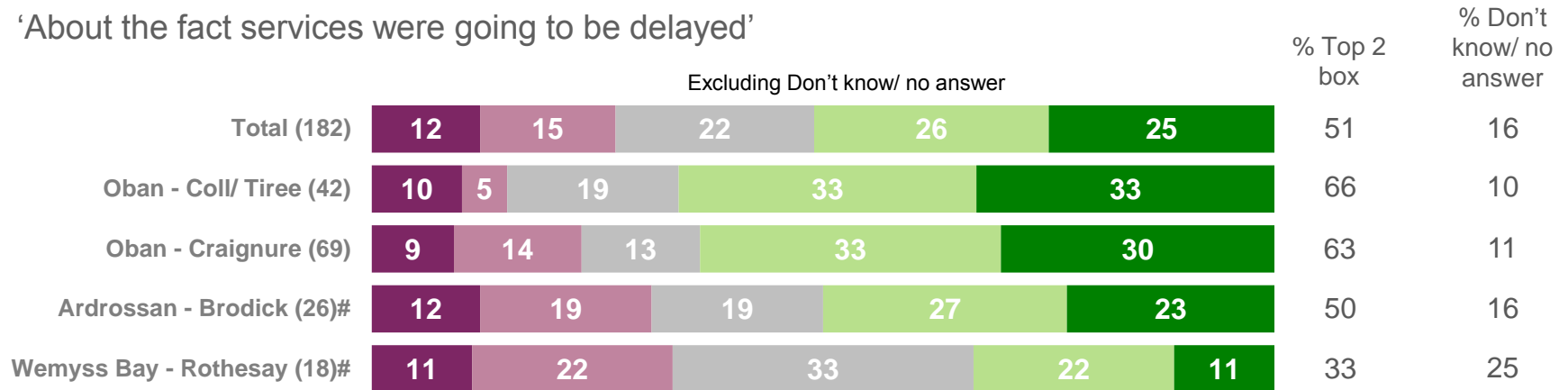
‘Whether experienced a delay’



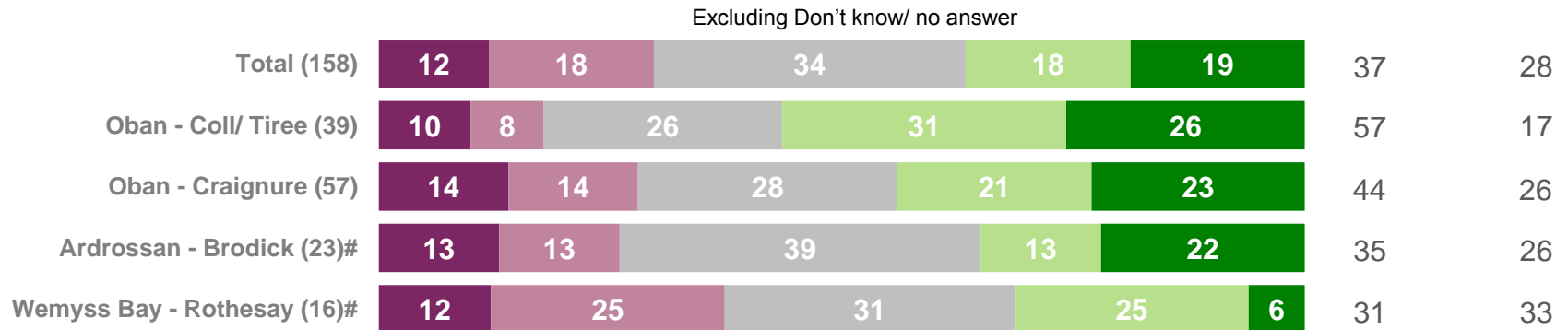
Caution: Low base size

‘How well CalMac communicated with you...’

‘About the fact services were going to be delayed’

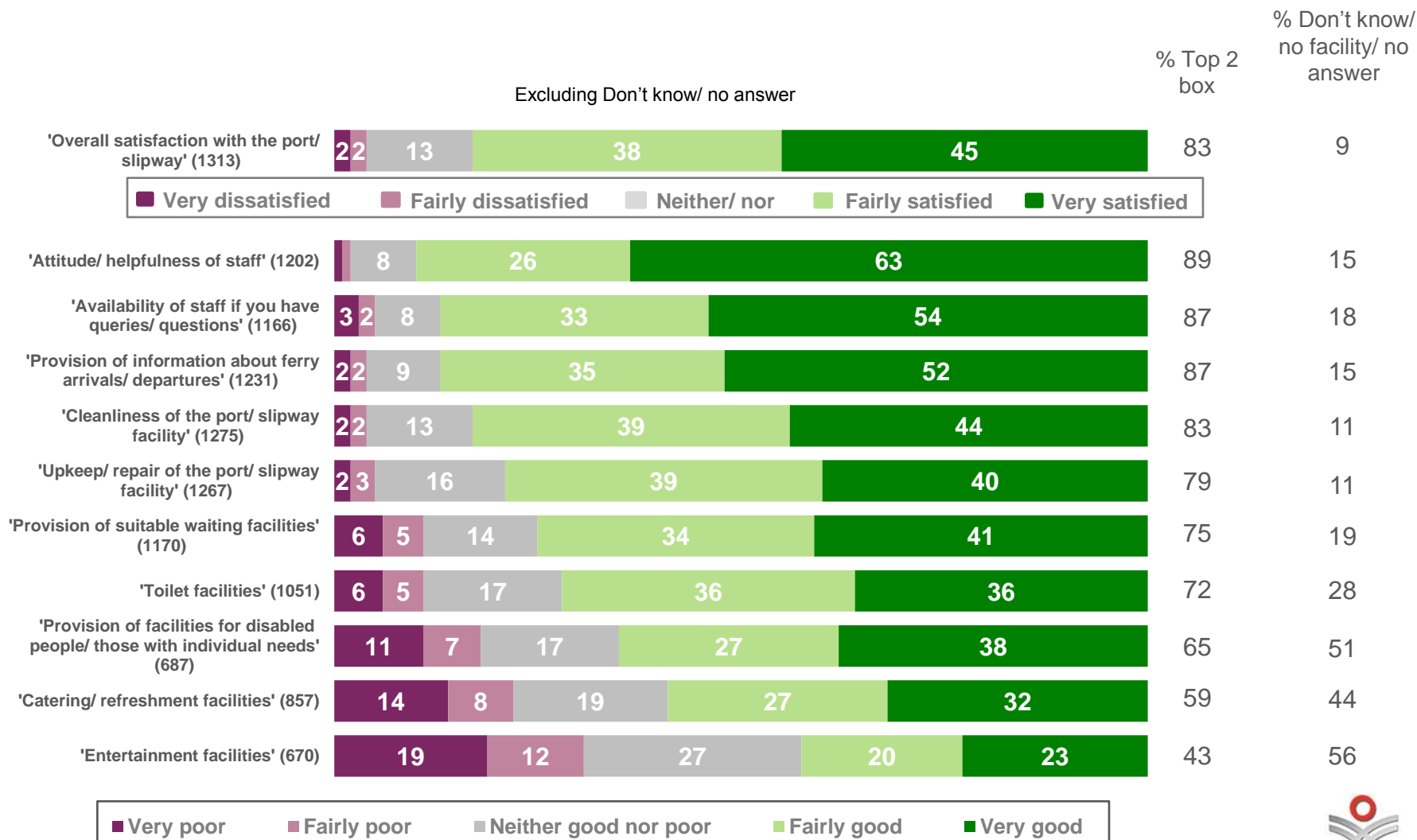


‘During the delay itself’



Caution: Low base size

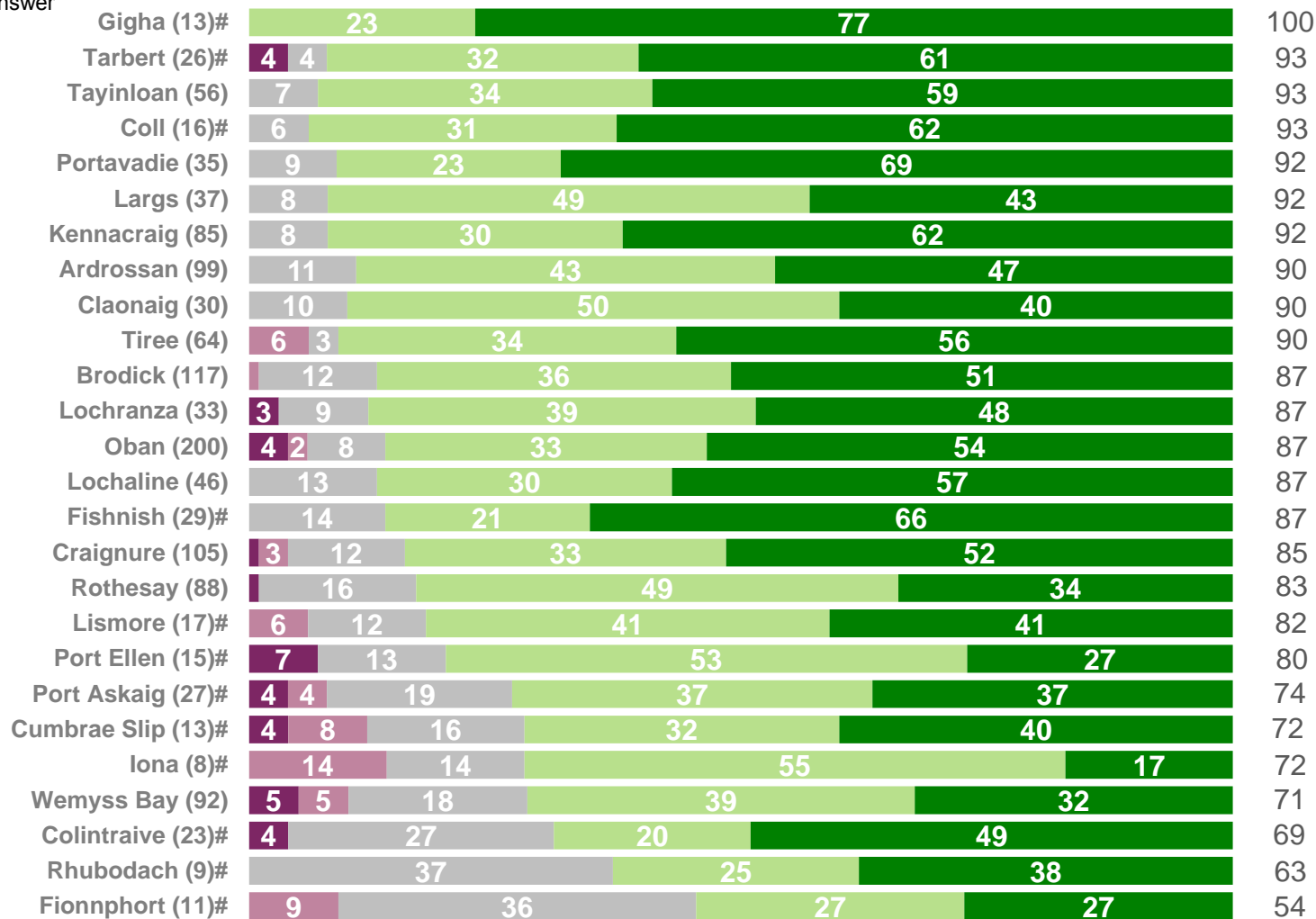
Rating of the facilities at the port/ slipway



'Overall satisfaction with port/ slipway' by port/ slipway boarded

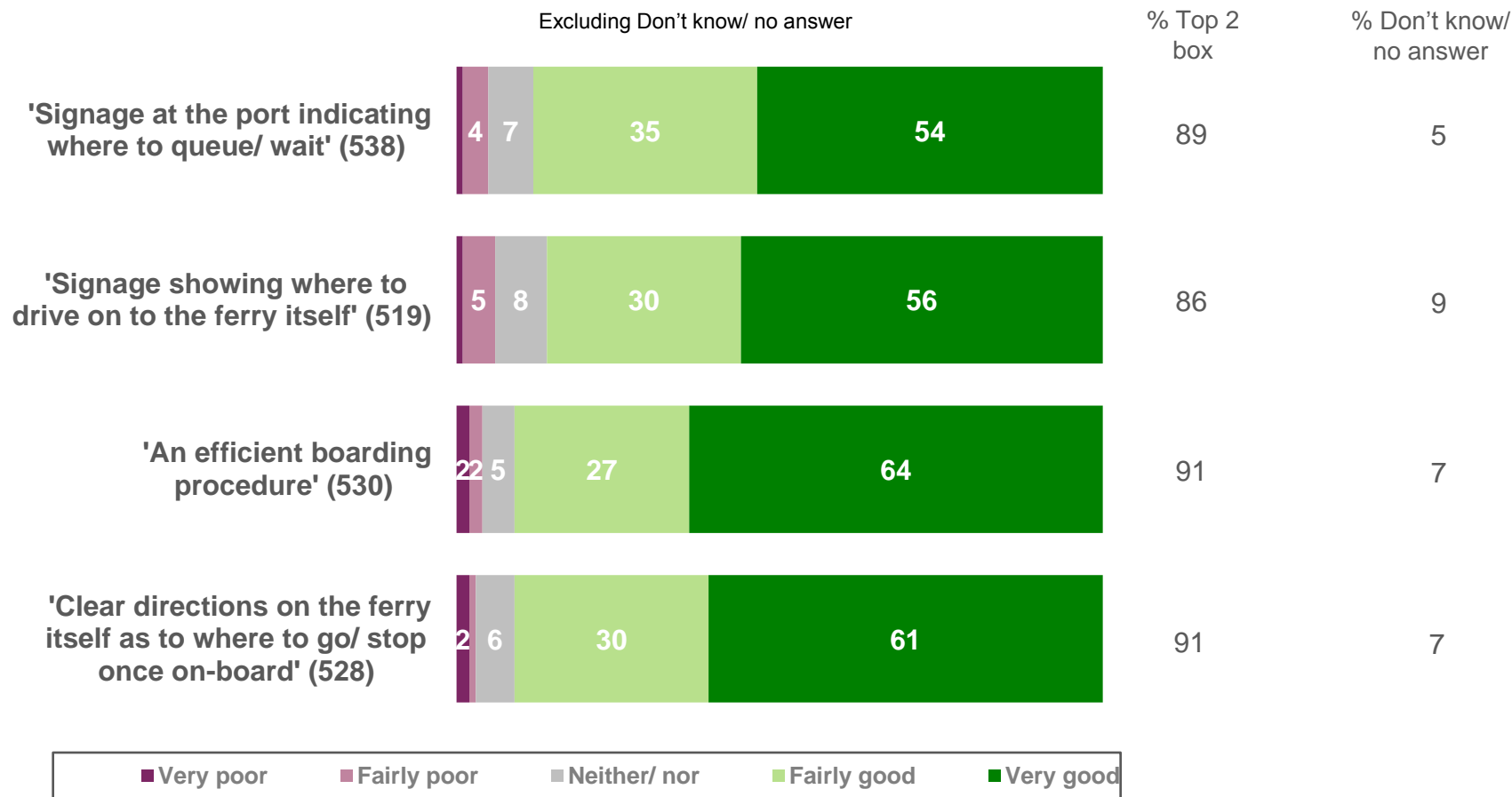
% Top 2 box

Excluding Don't know/ no answer



■ Very dissatisfied
 ■ Fairly dissatisfied
 ■ Neither satisfied nor dissatisfied
 ■ Fairly satisfied
 ■ Very satisfied

‘Embarking on to the ferry as a driver’



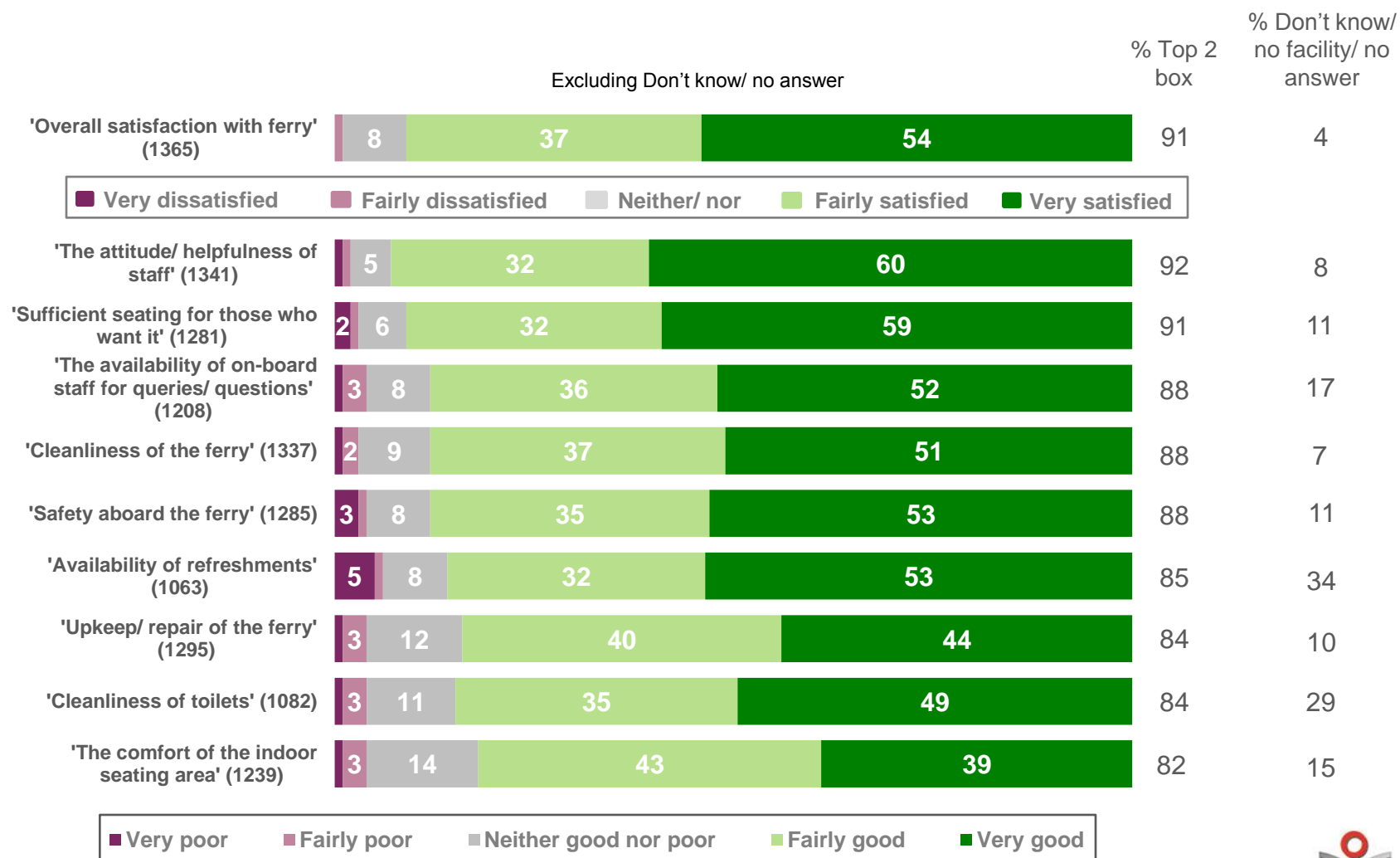
Disembarkation

Top 2 box scores shown. Figures exclude don't know/ no answer	Total %	Ardrossan – Brodick %	Wemyss Bay – Rothesay %	Kennacraig – Port Askaig/ Port Ellen %	Oban – Craignure %	Oban – Coll/ Tiree %
The speed of the disembarkation process	95	100	87	86	90	100
Helpfulness of staff to direct you off of the ferry	95	96	87	90	95	96
Conduct of the staff to enable you to disembark the ferry	94	96	87	90	90	96
The signs having disembarked the ferry that helped you to find your way out of the port	90	92	86	75	78	100
(Driver of vehicle who made an outward journey)	(165)	(30)	(23)	(22)	(20)	(25)

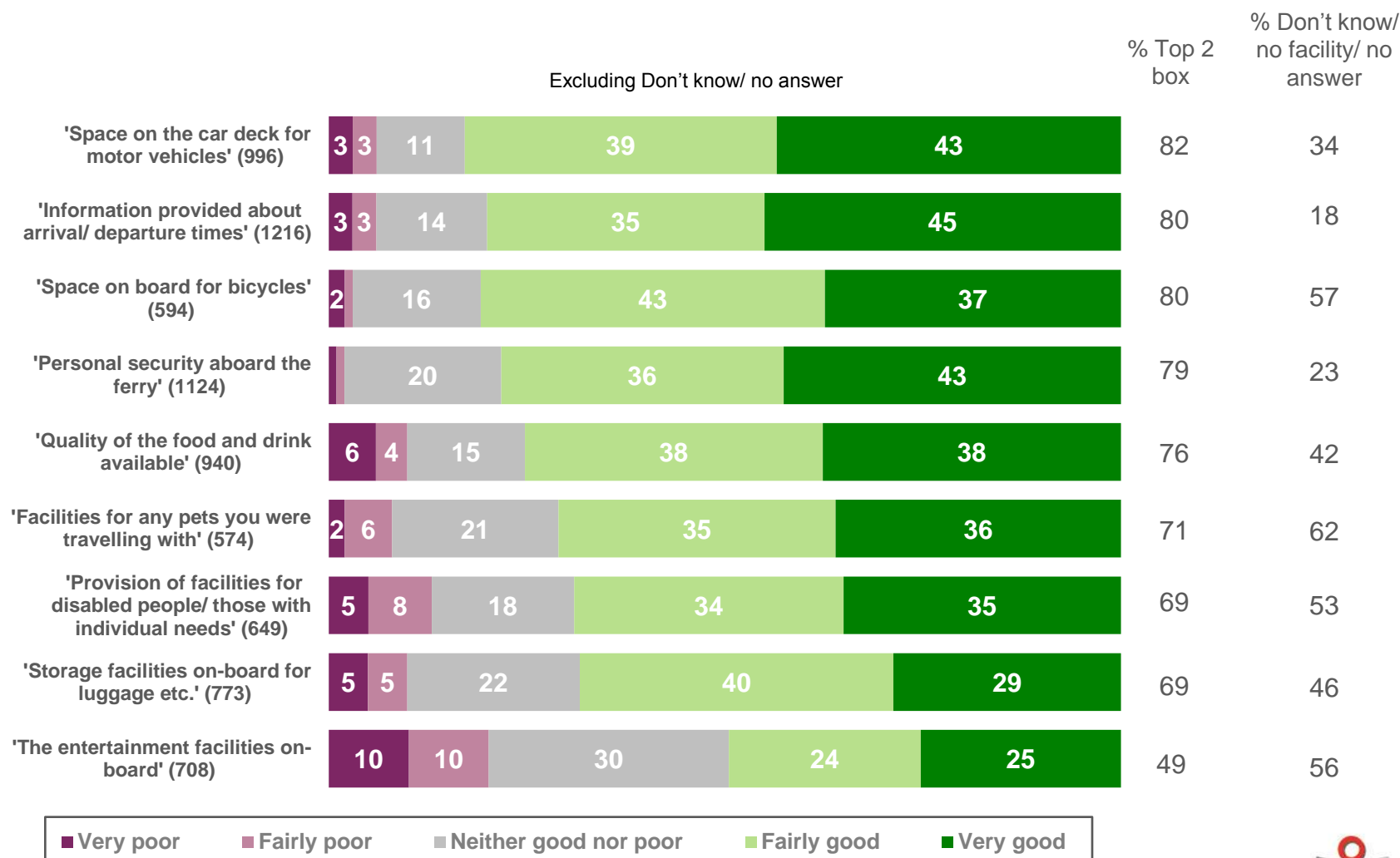
- Base sizes are too small to analyse by port/ slipway disembarked
- There is little negativity surrounding the disembarkation procedures on the services shown
- Although sample sizes are small, there is some evidence suggesting signs helping drivers navigate their way from the port on Kennacraig – Port Askaig/ Port Ellen & Oban – Craignure routes

The methodology of handing out/ collecting questionnaires on-board the ferry and asking participants to rate the journey/ crossing they are currently undertaking means the disembarkation process cannot be rated. The questionnaire asks any vehicle drivers who were making a return journey to write in the port/ slipway at which they disembarked on their outward journey and rate the disembarkation process at that port/ slipway.

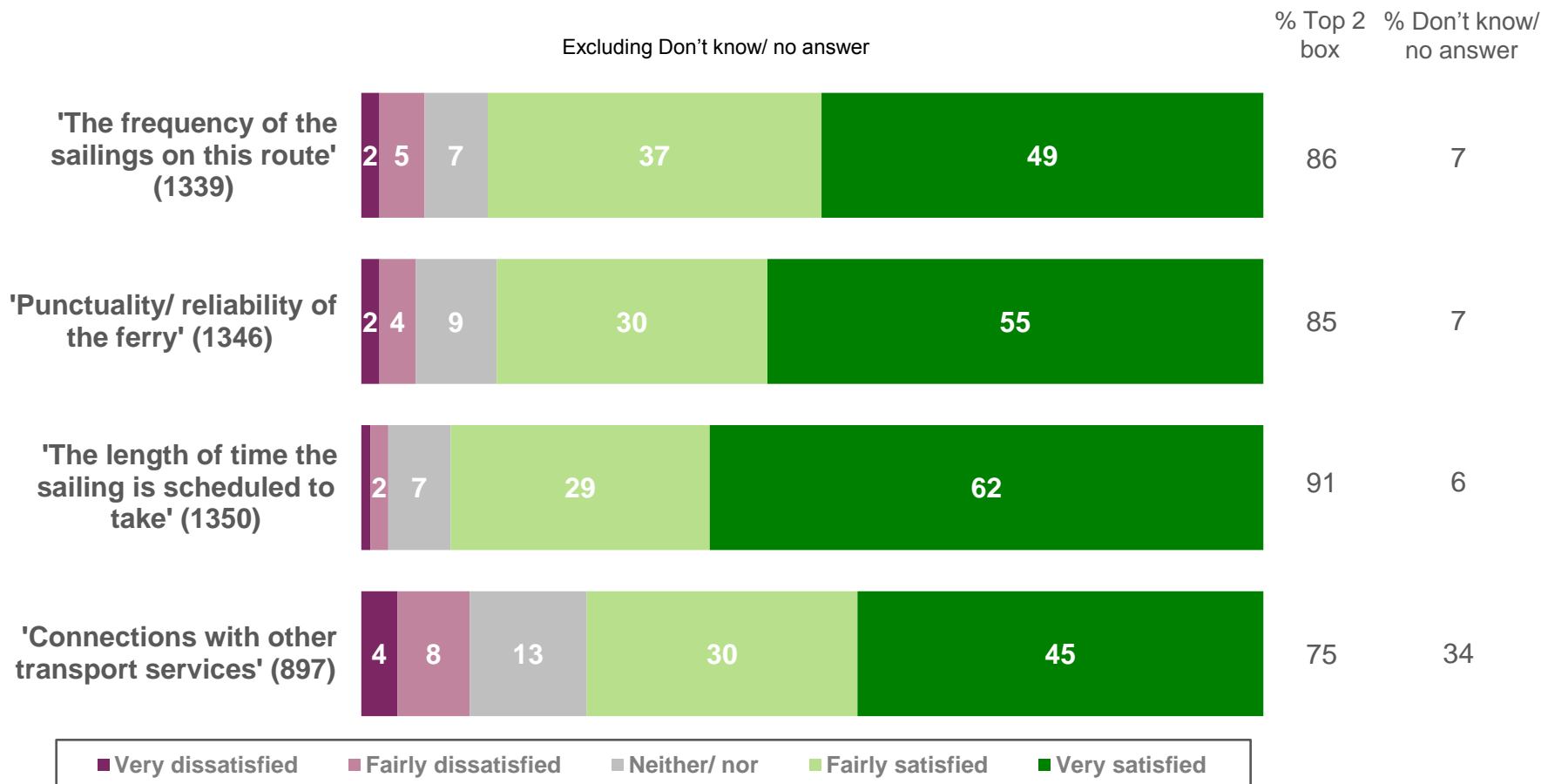
Rating of the ferry (I)



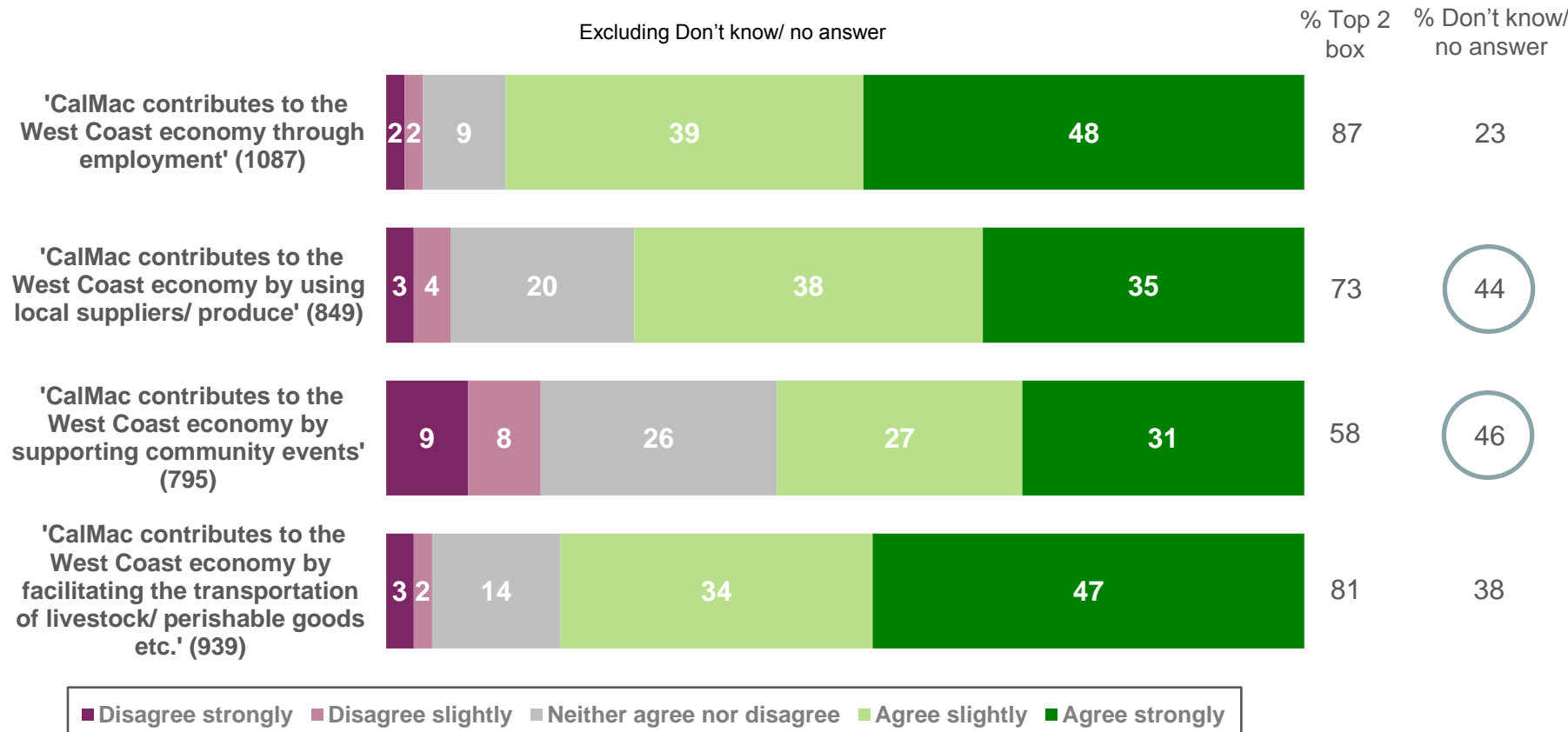
Rating of the ferry (II)



Satisfaction with the service factors

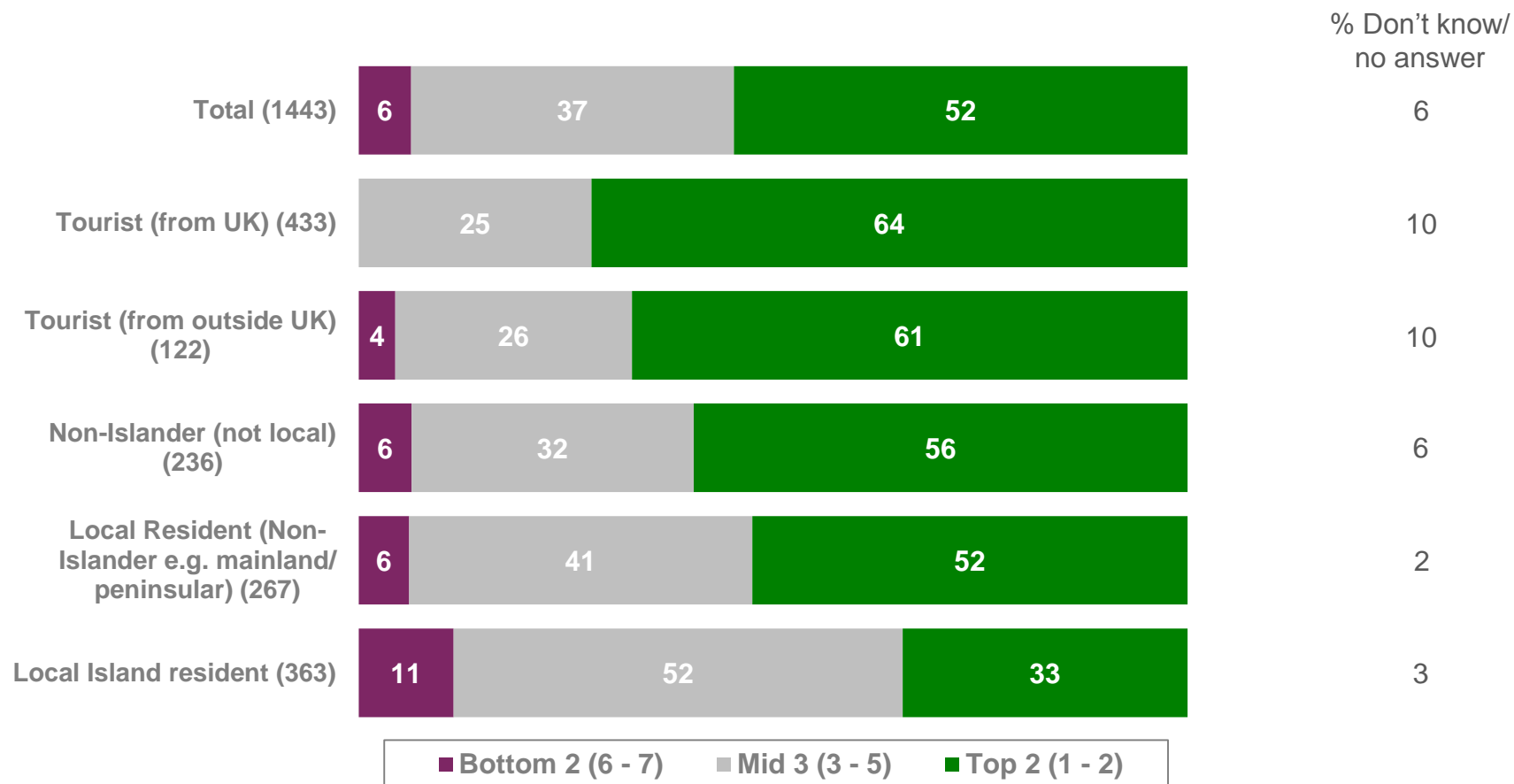


Agreement with statements regarding 'CalMac's contribution to local communities'



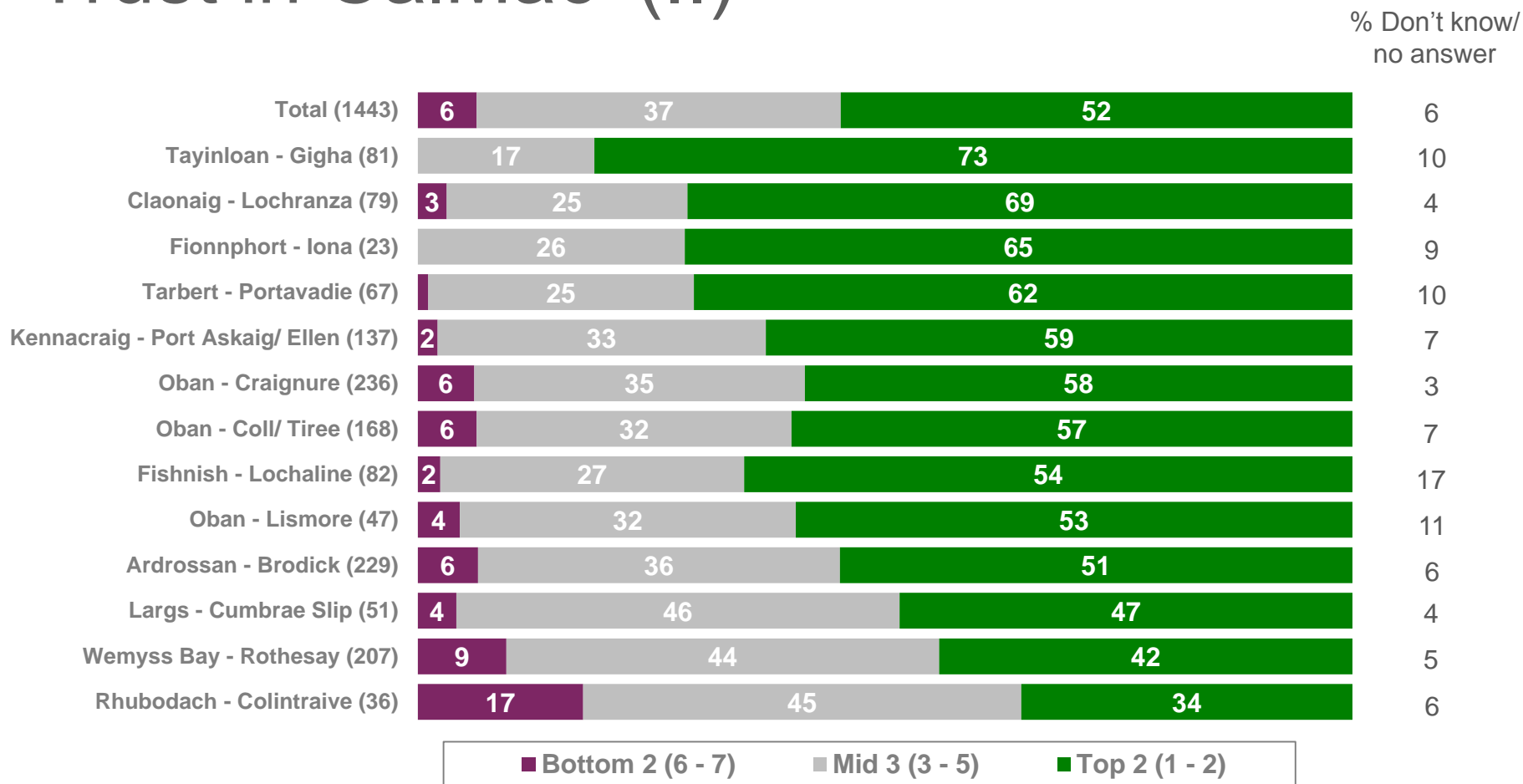
- Opportunities for closer relations with local communities. Disagreement regarding CalMac's support of community events is higher on Isle of Bute routes (19% Wemyss Bay – Rothesay and 43% Rhubodach – Colintraive)

'Trust in CalMac' (I)



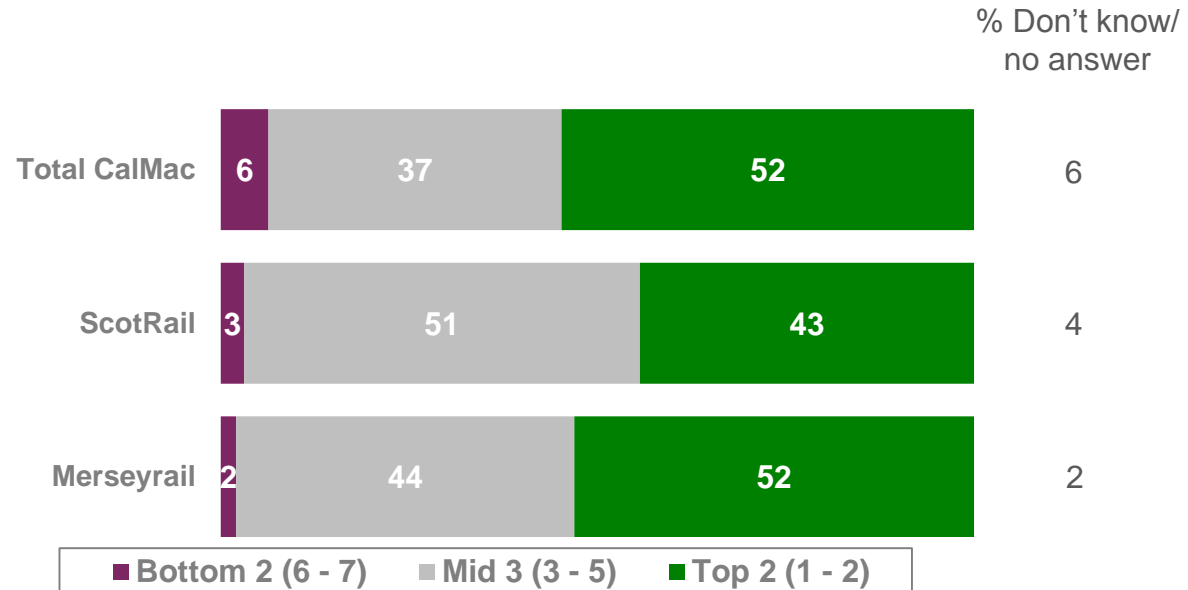
Scale is 1 – 7 where 1 is 'Trust them a great deal' and 7 is 'Do not trust them at all'

'Trust in CalMac' (II)



Scale is 1 – 7 where 1 is 'Trust them a great deal' and 7 is 'Do not trust them at all'

'Trust' compared with NRPS ScotRail



Scale is 1 – 7 where 1 is 'Trust them a great deal' and 7 is 'Do not trust them at all'

- CalMac compares favourably to ScotRail in levels of 'trust'
- The levels of 'trust' attributed to CalMac is more aligned with the top performer on the entire UK rail network (Merseyrail)



Passengers' relationship
with the rail industry
Executive summary
August 2014

ScotRail & Merseyrail data taken from the Passenger Focus 'Passengers' relationship with the rail industry' report, August 2014

Transport Focus projects in Scotland – contextual comparisons

	Overall Satisfaction	Punctuality/ reliability	Value for money
CalMac (May 2015)	90%	85%	66%
ScotRail (NRPS Spring 2015)	87%	84%	60%
Scottish Buses (BPS Autumn 2014)	92%	86%	71%
Edinburgh Tram (TPS Autumn 2014)	95%	94%	83%

Wemyss Bay – Rothesay (Base: 207)

38%

using 1-3 times
a week or more

20%

use 2-3 times
per month

Higher frequencies of
using the service could
explain the value for
money scores

Frequency of use vs.
cost is likely to be a key
factor reducing levels of
belief that CalMac is
acting in the best
interests of the island.

Will RET introduction be
sufficient to improve
confidence?

68%

purchased a
return ticket for
their journey

20%

had a multi-
journey/ period
pass for the
route

Is there scope for a
range of tickets more
aligned to travel
patterns?

32%

people take a
car onto the
ferry

51%

are foot
passengers

Advance ticket purchase
is low, **62%** of travellers
on this route purchased
tickets on the day of
departure at the port

46%

of those
travelling this
route were
local island
residents

The highest of the survey

Proximity of the
Rhubodach Colintraive
route could exacerbate
negativity surrounding
value for money

52% of Local Island
Residents were
dissatisfied with
perceptions of value for
money

37% of car users
were dissatisfied with
value for money

There is generally low
levels of negativity
regarding the service
provided by CalMac.

Anecdotal concerns
revolve around Bute's
economy; can CalMac
support local initiatives/
support more tourism?

35 minute crossing

● Route without RET

Rhubodach – Colintraive (Base: 36)

'The highest price for length of crossing in Europe' was a frequent comment during the scoping pilot in March. This is the overriding finding of this particular crossing and drives perceptions of CalMac here

38%

use 1-3 times/ week or more

75%

were using a car or smaller commercial vehicle

Expensive to make regular journeys

64%

purchased tickets on the day aboard the ferry/ at the slipway from CalMac personnel

58%

purchased return tickets

Directions for vehicle drivers boarding at Rhubodach are not rated as highly as Colintraive.

Of all those using this route, a third (33%) rated waiting facilities negatively

75%

Positively rated the 'upkeep/ repair of the ferry (lower than most other routes). A likely result of a fast crossing undertaken without leaving a car for most

An efficient boarding procedure (82% of vehicle drivers agreeing) and a short crossing means limited time for interaction with staff, which could explain slightly lower (but still reasonable) ratings compared with elsewhere

81%

Positive ratings for attitude of staff at the port. Fairly low compared to other ports but potentially a further result of a 5 minute crossing

82%

Rated positively for staff attitude on the ferry. 6% rated very dissatisfied. Likely a result of very short crossing

5 minute crossing

● Route without RET

Largs – Cumbrae Slip (Base: 51)

Lower car usage but negative value for money perceptions are evident:

55%

Satisfaction 'value for money'

63%

Were foot passengers

86%

Purchased a return ticket on day of travel

Is the cost of a return still perceived as too much for the frequency of using?

25%

Were using a car (£20.55 return).

Could the cost of a return with a car be prohibitive, causing customers to seek alternative methods of transport having had to cross as a foot passenger?

94%

Frequency of sailings were positively rated

(**76%** rated as very good)

100% of those answering expressed satisfaction that their preferred sailing was available for booking



A crossing time of just 10 minutes still gives ferry staff the opportunity to attract a

91%

positive helpfulness/ attitude rating among those answering

94%

Satisfaction with the ferry overall

The higher volume of foot passengers found plenty of seating availability should it have been required

10 minute crossing

● Route without RET

Ardrossan – Brodick (Base: 229)

75%

Positive ratings for the frequency of sailings is lower than other routes

A busy route according to CalMac passenger loading figures

Higher demand for spaces is leading to lower satisfaction among passengers overall with the ability to book preferred sailings:

70% 18%

Satisfied

Dissatisfied

The route carries the second highest proportion of Island residents of any of the routes covered

Second lowest of any route for punctuality/ reliability:

79% positive

13% negative

40%

Of participants classified themselves as 'Island Residents'

CalMac must ensure their needs are met by the number of sailings and ensuring space is available to them during peak tourist seasons

The ports/ slipways used for this route are the best rated for their waiting facilities:

54%

Rated them as 'very good'

Car drivers find this route the most difficult to book a space on-board their preferred sailing:

67% 22%

Satisfied

Dissatisfied

95%

Rated port/ slipway staff positively for their helpfulness/ attitude

The ports/ slipways used for this route are the best rated for their waiting facilities

90%

Satisfied with the ferry itself

94%

Satisfied with availability of refreshments on-board

22%

Dissatisfied with entertainment facilities on ferry

55 minute crossing

● Route with RET

Claonaig – Lochranza (Base: 79)

47%

Buying tickets
on the ferry
itself

Overall total =
10%

24%

Buying at the
port

Overall total =
47%

This is reflected in two-thirds buying a ticket on the day of travel

54%

Making
another ferry
journey on a
different route

8%

Only making a
return trip on
the same route

High levels of
Multi-Leg
(hopscotch)

Single leg
tickets

34% 32%

Only 29% were on return tickets compared to 76% of passengers as a whole.

57% 28%

Travelling with
cars

Bicycle users

86% of these bicycle users are going on to use other ferry routes. This does appear to put some pressure on space for bicycles with only 17% of those rating saying this is very good and 15% saying it is poor.

88%

Overall
satisfaction
with journey

83%

Value for
money

Overall facilities at the port/ slipway receive some negativity – particularly availability of toilets

24%

Rated toilets as poor

There is some negativity with regards to being able to book space/ purchase tickets for preferred sailings.

1 in 5 17%

Rated as poor Rated as very poor

Didn't know about availability of staff at the port where they boarded/ there weren't any available

23%

Dissatisfied

30 minute crossing

● Route with RET

Portavadie – Tarbert (Base: 67)

79%

passengers purchasing tickets on the ferry

40% **37%**

Buying a single ticket buying a return ticket

97%

Positive overall satisfaction

Overall very strong satisfaction scores

67%

Very satisfied overall with the port where they boarded

77%

Very satisfied overall with the ferry itself

The highest top box scores on these crucial overall factors across any route

However, value for money does fall into the lower half of routes with only:

59%

Satisfied

Most individual scores reflect the strong performance of this route with little negativity observed. However,

16%

Did rate availability of staff at port/ slipway as poor (only Fionnphort – Iona receiving a lower score).

It is important to note the staff at ports here were very well rated

The highest top box score on any of the routes for staff attitude:

78%

Rating staff attitude 'very good'

1/3rd

Were negative towards the catering and refreshment facilities on ports/ slipways

Availability & quality of refreshments and on-board entertainment are the only areas of any concern on the ferry itself.

82%

Rating staff attitude and helpfulness as very good on ferry

83%

Rating ferry cleanliness as very good

80%

Rating ferry upkeep/ repair as very good

25 minute crossing

● Route without RET

Tayinloan – Gigha (Base: 81)

70%

Purchasing tickets
on the ferry

89%

Buying a return
ticket

63%

Are tourists

51%

Use once every
few months or
less

49%

Are on a day trip

22%

were using for
the first time

82%

Rated the ability to book space/
travel on their preferred sailing
as very good

72%

Rated frequency of sailings as
very good - likely to help here

42% 42%

Car
passengers

Foot
passengers

100%

Satisfaction with punctuality/
reliability

84%

Ratings were positive for value
for money

**The route achieves
the highest value for
money rating**

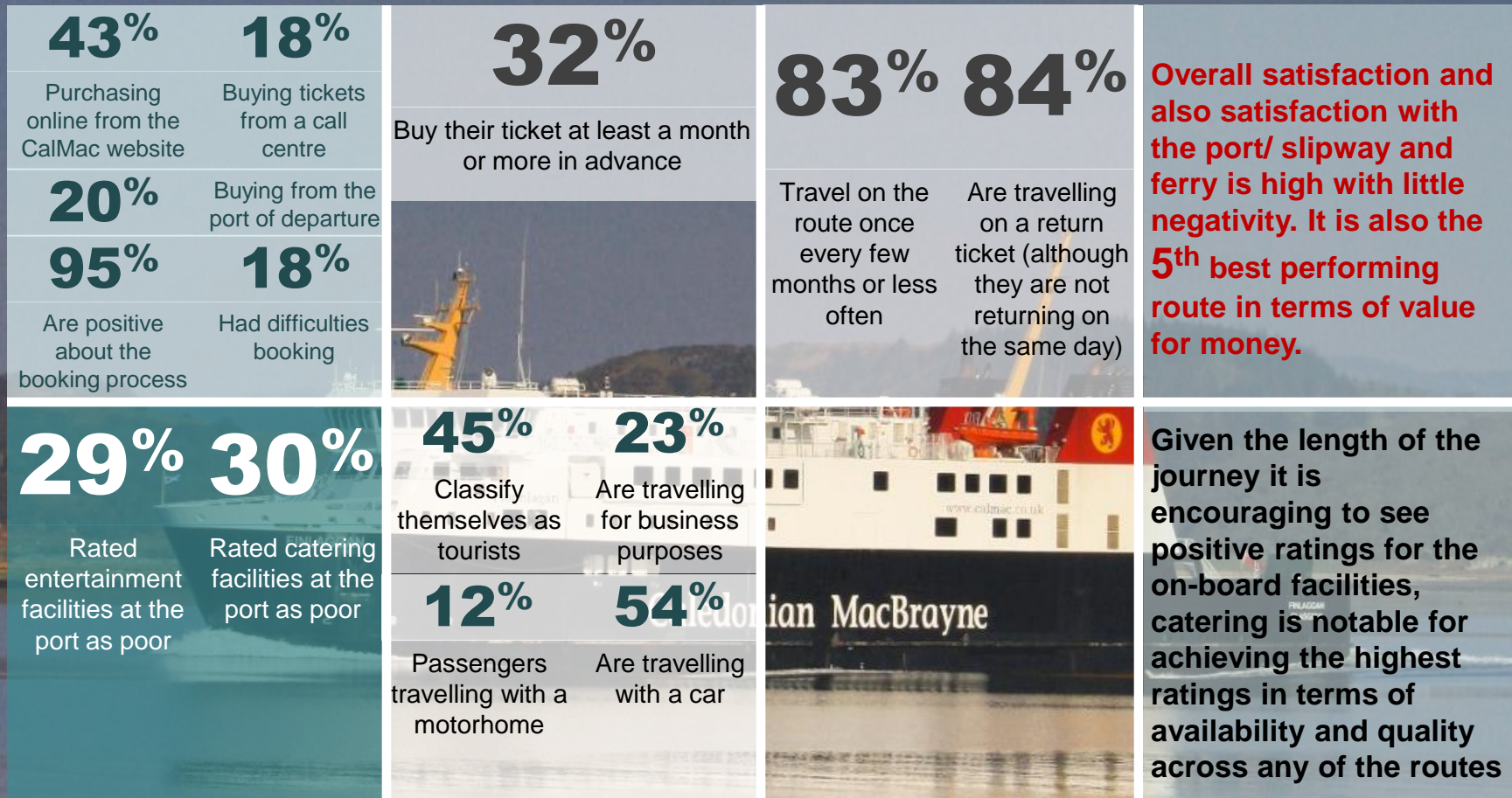
**Overall the route has the
highest overall
satisfaction rating and is
in the top three routes in
terms of the overall port/
slipway and overall ferry
ratings.**

**The only minor levels of
dissatisfaction are
toilets on ports/
slipways and
refreshments
(availability and quality)
on board the ferry.**

20 minute crossing

● Route with RET

Kennacraig – Port Askaig/ Port Ellen (Base: 137)



145 minute crossing

● Route with RET

Oban – Craignure (Base: 236)

55%

Were tourists

53% 28%

Were travelling on foot

Were travelling by car

8% were travelling on a coach with more than 30 seats.

78%

Satisfaction with punctuality/ reliability. Lowest of all routes

78% 28%

Were on return tickets

Were making both legs of their return journey on the day of the interview

There is fairly infrequent usage levels

74%

using every few months or less often.

82% 87%

Are satisfied with their journey overall

Are satisfied with the port/ slipway

90%

Are satisfied with the ferry

Other than potential reliability issues and service wide issues of entertainment at slipways/ ports and on-board, there is no other negativity noted towards any individual aspects of the service.

45 minute crossing

● Route without RET

Lochaline – Fishnish (Base: 82)

71% 5%

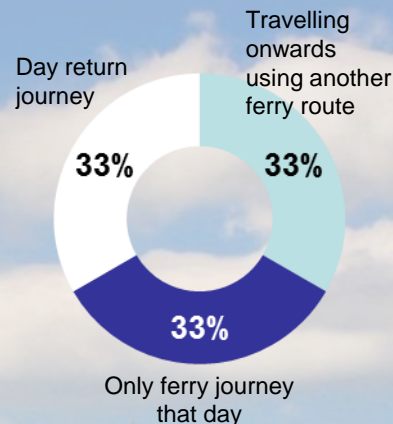
Were travelling by car Are foot passengers

The majority (57%) buying their ticket on the ferry itself

2/3rd

Passengers are tourists

With almost a quarter (24% - the highest on any route) being tourists (from outside the UK)



57% 28%

Bought a return ticket Bought a single ticket

57% 17%

Bought tickets on the ferry on the day of travel At the port of departure on the day of travel

Overall impression of value for money are low on this route (57% positive) - it is the only route in the bottom five for VFM that has more tourists – the other four cater mainly for local residents.

93% 87%

Positive overall journey satisfaction Positive port/slipway

95%

Positive overall ferry satisfaction

14% 15%

Rating the availability of staff at the port/slipway poorly Rated toilet facilities at the port as poor

However catering/ refreshment facilities at the port received the highest very good (top box = 53%) rating of any of the routes.

The ferry itself receives amongst the highest 'top-box' ratings on any route for most factors (although usage of some e.g. seating is low). Due to the short journey time and small sample size the availability of catering score is pulled down by a few passengers looking for this

20 minute crossing

● Route without RET

Fionnphort – Iona (Base: 23#)

10^{min}

Crossing time

74%

Travelling on foot

87% 65%

Passengers
are tourists

are tourists
from the UK

54% 28%

Are travelling
on a return
ticket

Are travelling
on a single leg
tickets

10% 43%

Are travelling
on a Multi-leg
(Hopscotch)
ticket

Claimed to
have travelled
on a ferry
today prior to
this one

There is no negativity over booking spaces on services (even amongst the few car users who need to apply for a permit in advance).

Overall the route achieves the fourth highest score for Value for Money

Whilst the base size is low, there are concerns over waiting facilities and availability of staff at ports/ slipways, and the availability of staff on-board the ferry.

#N.B. the research only achieved 23 respondents on this route

10 minute crossing

● Route without RET

Oban – Lismore (Base: 47)

The route carries the second highest proportion of Island residents of any of the routes covered

43% **21%**

Residents Local Non-Island residents

46%

Use the service at least once a week.

1 in 5

Being daily or infrequent commuters

Value for money positive rating

57%

As seen on the other services used predominantly by local residents (and with higher than average usage frequencies) the Value for Money score is worse than on some other routes

57%

Buy their tickets on the ferry

21%

Buy at the port on the day of departure

68%

Are travelling on a return journey

19%

Are on a multi-journey/ period pass

18% **22%**

Did not feel there were suitable waiting facilities at the port

Were concerned over toilet facilities

16%

Raised concerns about over the upkeep/ repair of port/ slipway

53%

Said catering facilities at port were poor

Highest level of dissatisfaction with punctuality/ reliability:

14%

Dissatisfied

27%

Rated the availability of refreshments/ catering on-board as poor

62%

Of those rating were negative towards the quality of refreshments

59%

Were negative towards on-board entertainment

55 minute crossing

● Route without RET

Oban – Coll/ Tiree (Base: 168)

69% 54%

Using once every few months or less often
Are travelling to/ from a holiday/ short break

The route has the lowest frequency of use by individual passengers of any of those covered

31% 26%

Buying tickets from the CalMac website
Bought tickets from the port on the day of

13% 29%

From the port before the day they were travelling
Bought their ticket at least a month in advance of travelling

73%

The route has the lowest overall satisfaction in terms of the frequency of sailings

91%

Of passengers were satisfied with their journey overall

90%

Are satisfied overall with the port/ slipway

89%

Being satisfied with the ferry

68% 84%

The route receives the highest very good (top box) rating for availability of staff at the port/ slipway

Rating for toilet facilities at port
Reflecting overall findings the only sizeable negativity was towards ferry entertainment facilities (14%)

94%

Were positive about the availability of refreshments on ferry

Rated very good for refreshments:

64% 87%

Rated the quality as good or very good:



There may be some capacity issues

14%

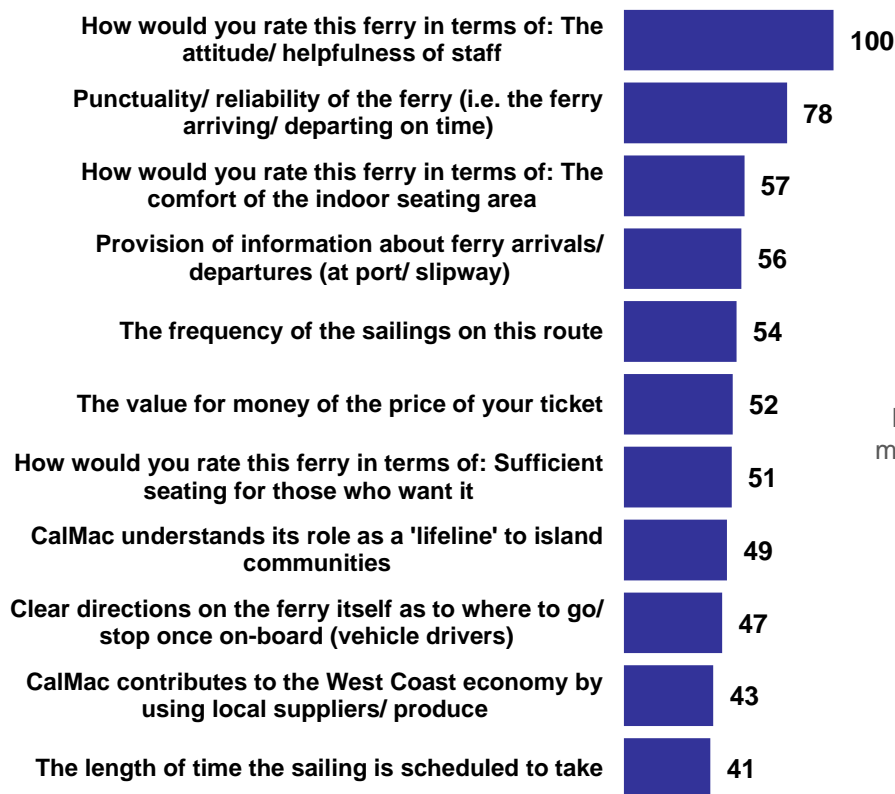
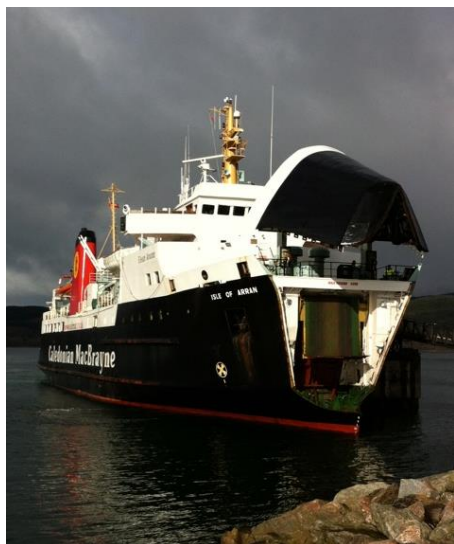
Rated the space on board deck for motor vehicles as poor

260/ 55 minute crossing

● Route with RET

Key Driver Analysis (Total)

Indexed list of factors driving Overall Journey Satisfaction:



Indexed on 'The attitude/ helpfulness of staff'. Top 11 measures of total index shown

- Key Driver Analysis (a statistical regression analysis technique) was deployed to uncover the key measures driving 'Overall Journey Satisfaction'
- The attitude/ helpfulness of staff on ferries and the punctuality/ reliability of the service are key elements driving positive satisfaction ratings

Customers with physical or mental impairments

15% overall said that they were affected by physical or mental health conditions

33% of this group said that their condition had an adverse effect on their ability to make journeys by ferry a little/ a lot

When asked about the 'provision of facilities at ports/ slipways for disabled people/ people with individual needs' **26%** of those with any disability were dissatisfied (mainly driven by those with mobility impairments 24% dissatisfied)

Although sample sizes were small, satisfaction levels are high among passengers with other non-mobility related impairments regarding facilities at the ports/ slipways and how they are equipped to help

A similar proportion (24%) of those with mobility issues also rated the ferry itself poorly overall for the 'provision of facilities on the ferry for disabled people/ people with individual needs'

5 people with vision impairments rated the facilities on-board the ferry as 'very poor' and a further 5 people with dexterity related impairments also rated the facilities 'very poor'

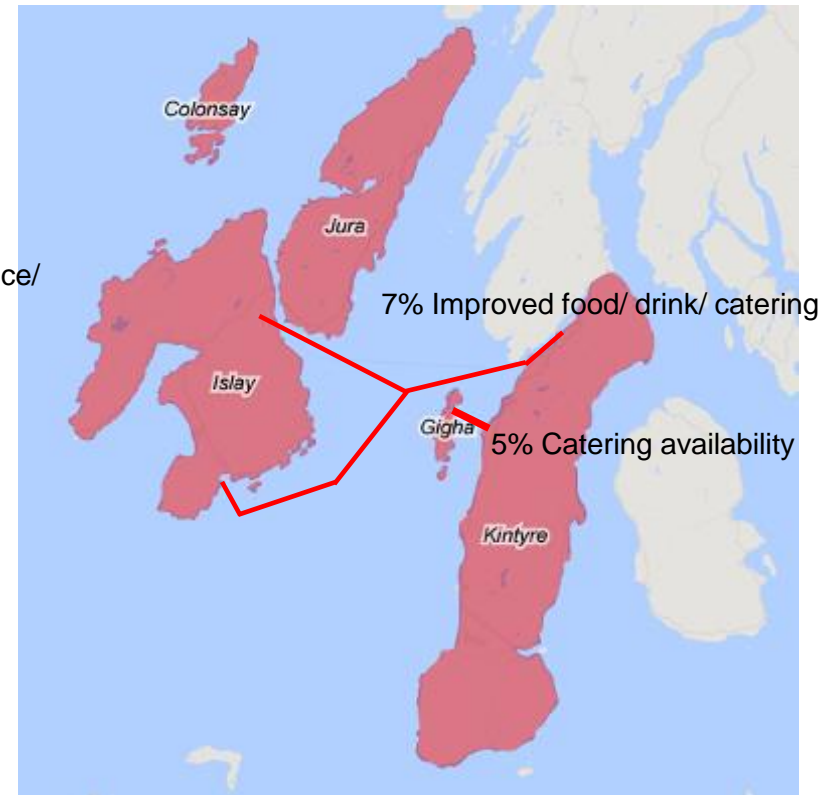
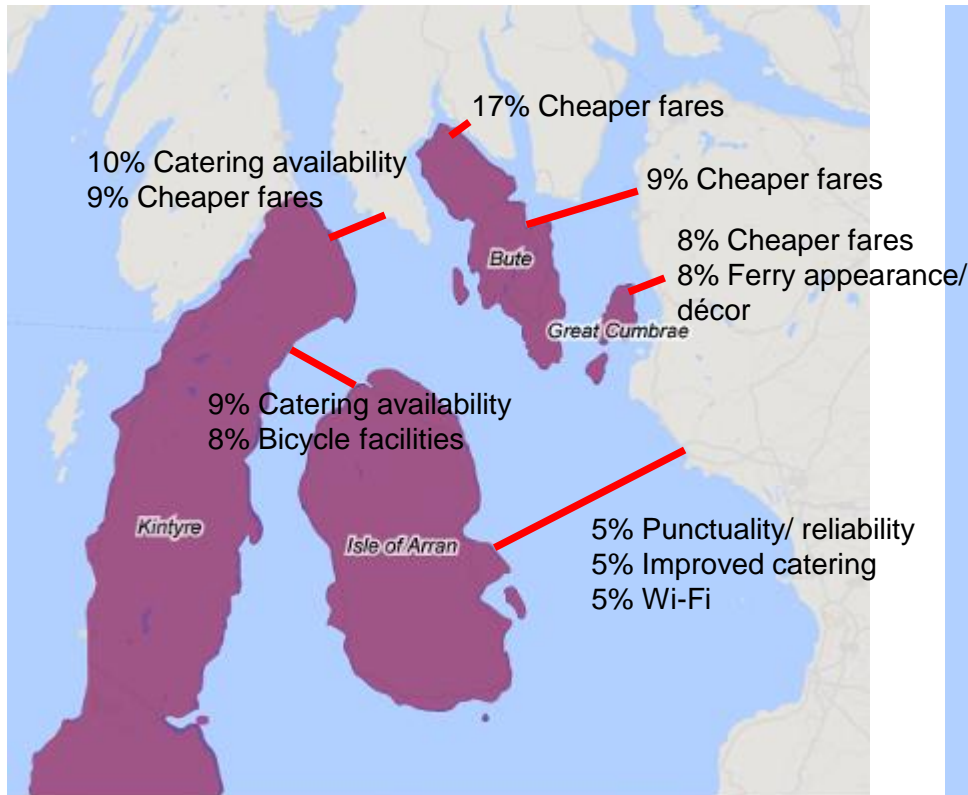
Impairments listed in questionnaire:

1. Vision (e.g. blindness or partial sight) **2.** Hearing (e.g. deafness or partial hearing) **3.** Mobility (e.g. only able to walk short distances or difficulty climbing stairs) **4.** Dexterity (e.g. difficulty lifting or carrying objects or using a keyboard) **5.** Learning or understanding or concentrating **6.** Memory **7.** Mental health **8.** Stamina or breathing fatigue **9.** Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger's syndrome)



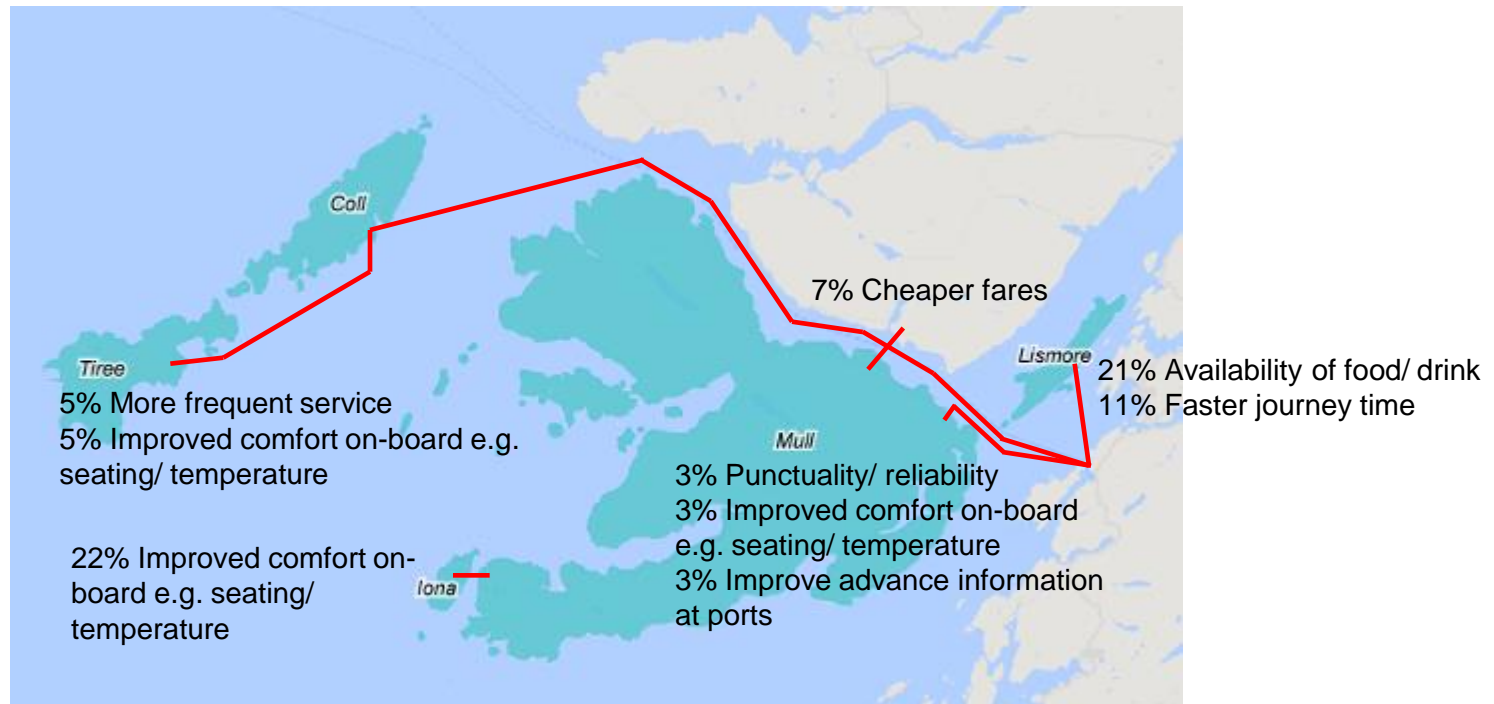
‘If something could have been improved, what would it have been?’ (I)

Spontaneous responses to ‘free-text’ question



‘If something could have been improved, what would it have been?’ (II)

Spontaneous responses to ‘free-text’ question



Prior to the main survey launch, a small pilot survey was undertaken by an Executive member of Future Thinking staff and a senior Field Agent to test the questionnaire and gain route/ area knowledge. An opportunity to talk with locals on the Isle of Bute revealed the following qualitative insight

- Residents of the Isle of Bute are concerned about the economy of the island. Conversations with local people raised concerns about the reducing number of visitors
- The cost of using the ferry was highlighted by many (both Wemyss Bay – Rothesay and Rhubodach – Colintrave services) and RET is keenly awaited in anticipation of lower fares
- ‘The highest price for length of crossing in Europe’ is a favourite quote for the Rhubodach – Colintrave service
- Introduction of RET on the Arran services is the yardstick by which improvements are anticipated by residents of Bute
- People suggested that CalMac could help the local economy by encouraging more tourism to the island and also actively supporting local events/ establishments
- Some felt that sailings were cancelled too readily owing to poor weather conditions
- The service provided by CalMac is generally accepted as being of a very high standard, just cost prohibitive

Conclusions

- The service provided by CalMac is generally rated very highly with minimal negativity reported for most measures
- Negative perceptions of value for money are evident on certain routes, particularly those where RET has yet to be introduced and are potentially exacerbated for those making more frequent ferry journeys
- Local island residents are less likely to view CalMac positively in terms of value for money. Perceptions of high ticket costs inhibiting ferry usage is likely to instil a reluctance to view CalMac as a company operating with their interests in mind
- There is an opportunity to forge closer community relationships, for example, by supporting local community events. Evidentially, the case is strongest among Isle of Bute inhabitants but also potentially beneficial among other communities served by CalMac elsewhere
- CalMac staff are rated very highly both at ports and on the ferries themselves. The front line face of the company, Key Drivers Analysis shows they are the most important element driving positive overall satisfaction levels
- Punctuality/ reliability is also a key factor driving overall satisfaction. Ardrossan – Brodick and Oban – Craginure routes need to be observed for this measure
- Perceived low frequency of sailings on the Ardrossan – Brodick route is putting pressure on customers' ability to book their preferred crossing
- There is also a potential need for increased frequency of sailings on the Oban – Coll/ Tiree route