

# SEStran Ferry Toolkit

## Section 3: Assessing the Need for Island and Remote Community Ferries

This document is part of iTransfer, a North Sea Region Interreg programme project, which is funded by the European Regional Development Fund.

iTransfer (Innovative Transport Solutions for Fjords, Estuaries and Rivers) aims to make ferry transport more freely accessible and sustainable, and encourage more people to travel by water. In areas in the North Sea Region (NSR) there are opportunities to replace existing vehicle routes with passenger ferries as a viable alternative. Travelling by ferry is more sustainable, easier and quicker. It can also provide lifeline services to remote communities.

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## Section 3: Assessing the Need for Island and Remote Community Ferries

### 1. Defining Community Needs

1.1. This document provides a draft methodology for assessing the need for island and remote peninsula domestic lifeline services. These services are those that provide essential access to communities and services and without which the communities would not be viable.

1.2. The source is the Scottish Ferries Review, recently completed by the Scottish Government, report on Routes, Services and Integration carried out by MVA consultants. This report has been edited to make it sufficiently general to be applicable throughout Europe and is part of a series of publications drawn together to provide a toolkit for practitioners when considering what needs to be examined in the development of a proposal for a new ferry service. Not all of the elements of the toolkit will be applicable in all cases but the use of the toolkit should ensure that all considerations that are relevant to a particular proposal are covered.

### 2. General approach

2.1. To provide a structured approach to assessing the needs of a community for ferry services, the following six stage approach is suggested:-

- Define community needs, in terms of business travel & commuting, personal dependency, supply chain, import - export and tourism;
- Develop proposed ferry services which would meet the needs of each community;

- Define current service for each community;
- Identify gaps in current service provision on the basis of (2) and (3);
- Systematically consider options to address gaps, in terms of current and future needs; and
- Prioritise future spending

### 3. Methodology Step 1: Define community needs

3.1. There are five key 'dependencies' – i.e. the ways in which islands are most dependent on their ferry services. These dependencies can be summarised as:-

- **Commuting dependency / Business travel dependency** – how important is the ferry to enable regular commuting and business travel to / from the island.
- **Personal dependency** – islands with few services / shops are heavily dependent on their ferry service for access to these services eg education, health and shopping. A 'sparsity index' can be used to quantify this degree of dependency.
- **Supply chain dependency** – for islands with a more substantial quantity of local services, these will be reliant on the supply chain for deliveries to shops, medical supplies etc. To some extent this will be the inverse of personal dependency.
- **Export / Import dependency** – different from the supply chain dependency (which serves end users), how important is the ferry for getting goods off and on the island as part of supporting industry eg manufacturing / agriculture etc.

- **Tourism dependency** – how dependent is the community on tourism?

3.2. Each of these ‘dependencies’ can be rated for its importance from A to E, representing ‘most dependent’ to ‘least dependent’.

#### 4. Methodology Step 2: Develop, broadly, a proposed ferry service to meet each community’s needs

4.1. The next step is to systematically develop a level of service based on current community needs. For example, this could be defined using a series of attributes:-

- Service should have a crossing time of between A and B minutes;
- Service should have between C and D number of sailings per day;
- Service should operate between E and F hours each day; and
- Service should operate between X and Y number of days per week.

4.2. A comprehensive checklist of this nature can provide a systematic approach to identifying or prioritising the characteristics of a ferry service for the community.

#### 5. Methodology Step 3: Define current service for each community and associated issues

5.1. The current service would be defined using the following attributes:-

- **Crossing Time:** The crossing time of the current service;
- **Sailings Per Day:** The number of sailings per day for each community;

- **Operating Day:** The length of operating day for each route serving a community; and
- **Days per week:** The number of days per week the ferry sails to each community.

## 6. Methodology Step 4: Identify gaps in current service provision on the basis of steps 2 and 3

6.1. The analysis should compare the proposed service as set out in step 2 with the current service as defined in step 3. The analysis would conclude whether:-

- A community was over provided against a particular attribute, as set out in Step 2;
- A community was under provided against a particular attribute as set out in Step 2; and
- The current service, with regard to a particular attribute, reflected the need of a particular community and required no change.

## 7. Methodology Step 5: Systematically consider options to address gaps

### 7.1. Theme 1: Variants around current route:

- Increasing or reducing the crossing time;
- Increasing or reducing the number of crossings per day;
- Shortening or lengthening the operating day; and
- Increasing or reducing the number of days per week of a service.

**7.2. Theme 2: New Route** - An alternative to varying the current service would be to introduce a new route which could better meet the needs of the community. This could involve:

- Short crossings;
- Hubs; and
- Shortest door-to-door travel times of known origins/destinations.

**7.3. Theme 3: Other-** The third theme to address an identified gap could be to look at other modes or services. For example, this could involve consideration of:

- Likely role of a fixed link;
- Likely role of enhanced air services;
- Case for freight only services; and
- Case for supplementary passenger services.

**7.3.1.** Prioritisation should involve traditional appraisal techniques and ensure:

- A proportionate approach;
- The widest gaps are dealt with first;
- Consideration of technical feasibility;
- Deliverability, including affordability;
- Consultation to encourage transparent process and public acceptability;
- Consideration of constraints, such as budgets and timeframe;
- Consideration is given to Government/European Economic Strategy;

- Consideration should objectives led and include for example economy, environment, safety, social inclusion and integration;
- Account is taken of the short, medium and long term impacts; and
- Consideration of relevant reports, from other agencies.

## 7.4. Supporting information

7.4.1. In order to support the six stage assessment process a range of supporting data will be required. Consideration should be given to the following sources and approaches with an indication of the type of data collected.

## 7.5. Household or Passenger Survey

7.5.1. A household or passenger survey could establish the level of customer satisfaction with the following aspects:

- number of days ferries operate;
- ferry reliability;
- earliest outward journey time;
- latest return journey time;
- winter timetables;
- level of fares;
- length of sailing time;
- frequency of sailings; and
- ferry integration with other modes of public transport.

Along with:-

- Reasons for Travelling
- Modes Used
- Modes Used to/from Ferry Terminals
- Importance, Satisfaction and Likelihood of Change relating to:-
  - Number of days the ferry runs

- Reliability
- Timings of first outward journey
- Timings of last return journey
- Winter Timetable
- The level of fares
- The length of sailing time
- Frequency of sailings
- Integration with other transport modes

## 7.6. Index of Sparsity

7.6.1. The Index of Sparsity combines measures of accessibility (by journey purpose / destination), population density and car ownership, as the key indicator of transport need. The Index of Sparsity, as it suggests, is a measure of how sparse the communities served by ferries are. It considers the accessibility to key services such as employment, hospital, GP, leisure facilities, education etc. Each community is awarded a score, with 100 being the highest ie least sparse and 0 being the lowest.

## 7.7. Service and demand data

7.7.1. This information is generally available from either in incumbent operator or the procuring authority for a supported service and should include:-

- Operator
- Annual Patronage
- Patronage Trends
- Daily Crossings (summer)
- Daily Crossings (winter)
- First crossing
- Last crossing

- Crossing Time
- Return Fare
- Any subsidy information.

## **7.8. Socio Economic Data for the Community served**

7.8.1. This is generally available from census data or publically available published information

- Age breakdown
- Population
- Unemployment
- Primary Industry
- Employment/ Income
- Education
- Health Facility

## **7.9. Opportunities**

7.9.1. With reference to key industries and economic activity reports, prospects from key industries affected by ferry services as well as potential opportunities where changes to freight services could help support increased economic activity through, perhaps, better logistics and product distribution, particularly in key exporting industries should be considered.

## **7.10. Entry and exit strategy**

7.10.1. Consideration should be given to the development of an entry and exit strategy for the public sector initially in support of the service and later in the transfer of the service to the private sector.

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