



Foot passenger service related ferry port benchmark study

on behalf of

INTERFACE project community

c/o Hanseatic City of Rostock
Neuer Markt 1
18055 Rostock
Germany

Summary

prepared by



PLANCO Consulting GmbH, Essen

Am Waldthausenpark 11, D-45127 Essen

Tel. +49-(0)201-43771-0; Fax +49-(0)201-411468

e-mail: planco@planco.de / <http://www.planco.de>

April 2011



Part financed by the European Union
(European Regional Development Fund)

www.interfaceproject.eu

Table of content

| | | |
|------------|--|----------|
| 1 | INTRODUCTION | 3 |
| 2 | PARTICIPATING PORTS AND FERRY ROUTES | 4 |
| 3 | METHODOLOGY | 4 |
| 4 | PERFORMANCE BENCHMARKS REGARDING WALK-ON PASSENGERS | 5 |
| 4.1 | Hinterland transport | 5 |
| 4.2 | Terminal | 7 |
| 4.3 | Boarding / Disembarkation | 8 |
| 5 | PORT PERFORMANCE AND ACTIONS | 9 |



1 Introduction

INTERFACE aims to vitalize foot passenger ferry transport in the South Baltic Area. Foot passenger numbers have decreased continuously in the past. Amongst others the abolition of duty-free with European integration and evolvement of low-cost carriers offering cheap flights has contributed to this development. Decreasing foot passenger numbers have continuously reduced initiatives to adjust corresponding services in ports and by ferry lines to changing passenger requirements or have even contributed to a downsizing of services. In turn, decreasing service levels have reduced attractiveness of ferry passage and established a negative circuit, so that foot passenger numbers and service levels have diminished continuously. Here applies INTERFACE and addresses relevant service areas. It aims to turn around the development and increase service levels as well as foot passenger numbers again.

One component of INTERFACE aims to “Develop SBA ports to modern service oriented hubs for (intermodal) cross-border passenger traffic”. Minimum and high quality standards to achieve this will be defined within a benchmark study. The study evaluates the performance of selected services in the ferry ports and their hinterland. Basing on this, deficits will be identified and possible actions to improve the situation developed. The analysis bases on interviews with experts, such as ferry operators, port and terminal operators, on-site evaluations and study trips on selected ferrys in autumn 2010.

Although some ferry lines operating in the South Baltic currently increase foot passenger capacities and services, foot passengers are usually regarded as niche market. Apart from singular actions at particular ports, a revitalization of foot passenger ferry transport in the South Baltic Area requires an increasing awareness of ferry connections among travellers. Particular attention should be paid to the integration of time schedules of ferries and corresponding public transport connections in online journey planners.

2 Participating ports and Ferry routes

This study investigates conditions for foot passengers on selected routes at ten ports (see table below). In addition to the ferry ports/routes in the South Baltic Area, two ports offering high service quality for foot passengers in the North Sea (ferry ports Hook of Holland and Harwich) are included.

Table 1: Participating routes

| Route | Ferry Line |
|-------------------------|------------------------|
| Rostock-Gedser | Scandlines |
| Rostock-Trelleborg | Scandlines, TT-Line |
| Karlskrona-Gdynia | Stena Line |
| Trelleborg-Sassnitz | Scandlines |
| Ystad-Świnoujście | Unity Line, Polferries |
| Hook of Holland-Harwich | Stena Line |

3 Methodology

In all participating ports the performance of services and facilities for foot passengers will be compared. As overall performance of ferry ports regarding foot passengers is very complex, with a wide range of services and facilities, relevant components are assessed separately.

Minimum requirements will be defined for each service component. Satisfying minimum standards for foot passengers performance is at least sufficient (0). While service levels not fulfilling minimum standards are regarded as poor (-), superior service levels determine good (+) performance. The assessment shows in how far a port complies with minimum requirements and describes strengths and weaknesses of particular ports. Best practice examples serve as guideline for potential improvements to achieve a high quality standard.

Ports are interfaces between land and sea. For foot passenger the following components are relevant:

- Hinterland Transport
- Passenger Terminal
- Boarding/Disembarkment

Performance criteria include availability and convenience of services and facilities as well as accessibility and quality of information on services and facilities (before and during the journey). During the journey information requirement is supplemented by the need for sufficient guidance through the interfaces. Foot passengers expect good signage to ensure easy wayfinding.

Special attention will be paid to needs of passengers with reduced mobility. An EU directive coming into effect 2012 demands barrier-free accessibility of ferry terminals and assistance. Although handicapped accessibility is increasingly becoming standard, there are still obstacles in particular for ferry passengers travelling without car. Therefore level of services and information regarding handicapped accessibility will be considered as performance criteria.

4 Performance benchmarks regarding walk-on passengers

4.1 Hinterland transport

For foot passengers public transport connection from and to the port is important and is therefore evaluated separately in terms of different service components. Further service criteria, which are relevant for foot passengers in terms of hinterland transport are taxi services as well as the availability of parking lots (for those leaving their car at the port). Service components regarding hinterland transport of foot passengers are evaluated based on the following performance criteria and minimum requirements.

Table 2: Performance evaluation framework hinterland transport

| Service component | Performance Criteria | Minimum Standard |
|--|---|---|
| Public transport connection | <ul style="list-style-type: none"> • Transfer time • Quality <ul style="list-style-type: none"> • Requirement to interchange • Availability of limited stop service (shuttle) | <ul style="list-style-type: none"> • Transfer within 30 minutes for majority of ferries |
| Public transport information | <ul style="list-style-type: none"> • Information before / during the journey <ul style="list-style-type: none"> ○ Availability ○ Quality | <ul style="list-style-type: none"> • Information provided <ul style="list-style-type: none"> • Before journey by ferry line • At origin port or onboard • At terminal on arrival |
| Public transport guidance | <ul style="list-style-type: none"> • Wayfinding • Signage <ul style="list-style-type: none"> ○ Extensiveness ○ User-friendliness | <ul style="list-style-type: none"> • Easy wayfinding between public transport and terminal |
| Public transport convenience | <ul style="list-style-type: none"> • Ticketing • Walk between terminal and stop/station <ul style="list-style-type: none"> ○ Distance ○ Walkway conditions • Waiting facilities | <ul style="list-style-type: none"> • Public transport serving the terminal • Easy ticketing without local money required |
| Non-public transport facilities and services | <ul style="list-style-type: none"> • Car parks • Taxi service • Car rental | <ul style="list-style-type: none"> • Sufficient number of car parks within walking distance • Taxi availability |
| Handicapped accessibility | <ul style="list-style-type: none"> • Barrier-free accessibility • Assistance • Information | <ul style="list-style-type: none"> • Public transport accessible for wheelchair users without assistance |

Hook of Holland and Harwich are top performers regarding hinterland transport. Trains serve the terminals directly and public transport service level is high. Moreover, non-public transport facilities and services are good and hinterland transport is accessible for handicapped passengers. Among South Baltic Area terminals Karlskrona and Gdynia perform best. In particular, public transport guidance is a deficit at these ports. The other terminals perform weaker and show more deficits. Overall, public transport information and guidance show the weakest performance among service components.

Table 3: Performance hinterland transport

| Service Component | Port | | | | | | | | | |
|--|---------|--------|------------|------------|--------|----------|-------|-------------|-----------------|---------|
| | Rostock | Gedser | Trelleborg | Karlskrona | Gdynia | Sassnitz | Ystad | Świnoujście | Hook of Holland | Harwich |
| Public transport connection | 0 | + | + | + | + | - | - | - | + | 0 |
| Public transport information | 0 | - | - | 0 | 0 | - | - | 0 | + | + |
| Public transport guidance | - | - | 0 | - | - | 0 | - | - | + | + |
| Public transport convenience | - | 0 | - | 0 | 0 | - | - | - | + | + |
| Non-public transport facilities and services | 0 | - | 0 | + | + | 0 | 0 | + | + | + |
| Hinterland transport handicapped accessibility | 0 | - | 0 | + | 0 | - | 0 | - | + | 0 |

Legend: + good performance, 0 sufficient performance, - poor performance

4.2 Terminal

Foot passengers expect a comfortable and functional terminal ensuring convenient pass through and waiting. This covers availability and quality of different services and facilities. Additionally, tourist information is requested by foot passengers passing through terminals and evaluated separately. The following service components and performance criteria are considered. Minimum standards serve as base for the evaluation.

Table 4: Performance evaluation framework terminal

| Service component | Performance criteria | Minimum Standard |
|------------------------------------|--|---|
| Terminal convenience and services | <ul style="list-style-type: none"> • Facilities <ul style="list-style-type: none"> ○ Availability ○ Quality • Ticketing/check-in • Luggage | <ul style="list-style-type: none"> • Terminal open for all ferry departures and arrivals • Adequate ticketing and check-in • Elevator to move between floors • Sufficient seating and toilets • Clean facilities • Snacks and drinks for purchase • Public telephone |
| Terminal information | <ul style="list-style-type: none"> • Tourist information incoming / outgoing <ul style="list-style-type: none"> ○ Availability ○ Quality • Departure information <ul style="list-style-type: none"> ○ Availability ○ Quality | <ul style="list-style-type: none"> • Tourist information for <ul style="list-style-type: none"> • Incoming passengers • Outgoing passengers |
| Terminal guidance | <ul style="list-style-type: none"> • Wayfinding • Signage <ul style="list-style-type: none"> ○ Extensiveness ○ User-friendliness | <ul style="list-style-type: none"> • Easy wayfinding in terminal |
| Terminal handicapped accessibility | <ul style="list-style-type: none"> • Barrier-free accessibility • Assistance • Information | <ul style="list-style-type: none"> • Facilities and services in terminal accessible for wheelchair users without assistance • Assistance for passengers with reduced mobility |

The terminal in Harwich performs good with respect to all performance criteria applied. The other North Sea terminal considered, Hook of Holland, and the terminal in Gdynia show next best performance. With two criteria each achieve good performance, they by far outperform other terminals. Gedser, Trelleborg and Karlskrona are best among weaker terminals. Overall, deficits exist particularly regarding convenience and services as well as guidance.

Table 5: Performance terminal

| Service Component | Port | | | | | | | | | |
|------------------------------------|---------|--------|------------|------------|--------|----------|-------|-------------|-----------------|---------|
| | Rostock | Gedser | Trelleborg | Karlskrona | Gdynia | Sassnitz | Ystad | Świnoujście | Hook of Holland | Harwich |
| Terminal convenience and services | 0 | - | - | 0 | 0 | - | - | 0 | 0 | + |
| Terminal information | - | 0 | 0 | 0 | + | 0 | 0 | - | - | + |
| Terminal guidance | - | 0 | 0 | - | + | - | - | - | + | + |
| Terminal handicapped accessibility | - | 0 | 0 | 0 | - | - | 0 | 0 | + | + |

Legend: + good performance, 0 sufficient performance, - poor performance

4.3 Boarding / Disembarkation

The benchmark investigation for foot passengers finally considers relevant services in terms of boarding and disembarkation procedures. These include the following service components and performance criteria. The listed minimum standards are required to achieve a sufficient service level.

Table 6: Performance evaluation framework boarding / disembarkation

| Service component | Performance criteria | Minimum standard |
|--|---|--|
| Boarding/ disembarkation information and guidance | <ul style="list-style-type: none"> • Information <ul style="list-style-type: none"> ○ Availability ○ Quality • Wayfinding • Signage <ul style="list-style-type: none"> ○ Extensiveness ○ User-friendliness | <ul style="list-style-type: none"> • Adequate information on shuttle bus operation (if applicable) • Easy wayfinding on and off board |
| Boarding/ disembarkation convenience | <ul style="list-style-type: none"> • Availability of gangway/passenger tower • Walking distance • Weather protection • Shuttle bus quality • Luggage | <ul style="list-style-type: none"> • Gangway or passenger tower • Elevator to move between floors |
| Boarding/ disembarkation handicapped accessibility | <ul style="list-style-type: none"> • Barrier-free accessibility • Assistance • Information | <ul style="list-style-type: none"> • Accessibility for wheelchair users without assistance • Assistance for passengers with reduced mobility |

Hook of Holland and Harwich show the best performance regarding boarding and disembarkation, too. All service components perform good. Gdynia and Karlskrona are top performers among South Baltic Area terminals. For instance, both provide a very convenient boarding and disembarkation procedure. Gedser and Ystad follow next with a sufficient performance. Terminals with shuttle bus operation in Rostock and Trelleborg perform weak. Overall, in particular handicapped accessibility leaves scope for improvement.

Table 7: Performance boarding/disembarkation

| Service Component | Port | | | | | | | | | |
|---|---------|--------|------------|------------|--------|----------|-------|-------------|-----------------|---------|
| | Rostock | Gedser | Trelleborg | Karlskrona | Gdynia | Sassnitz | Ystad | Świnoujście | Hook of Holland | Harwich |
| Boarding/Disembarkation information and guidance | - | 0 | - | 0 | + | 0 | 0 | 0 | + | + |
| Boarding/Disembarkation convenience | - | 0 | - | + | + | 0 | 0 | 0 | + | + |
| Boarding/Disembarkation handicapped accessibility | - | 0 | - | 0 | - | - | 0 | - | + | + |

Legend: + good performance, 0 sufficient performance, - poor performance

5 Port performance and actions

When summarising the overall service performance of ports for foot passengers the North Sea terminals Hook of Holland and Harwich provide the best service level. But even for these ports there is room for improvement (terminal and public transport). Among the analysed South Baltic Area ports Karlskrona and Gdynia stand out with a significant number of well performing services. The overall service level for foot passengers in the other analysed ports (Rostock, Gedser, Trelleborg, Sassnitz, Ystad and Świnoujście) is worse and provides a significant scope for improvement.

When comparing the performance of different services across ferry terminals, it can be highlighted that the components with the biggest scope for improvements are public transport convenience, information and guidance. Another weak service component is the terminal convenience. On the other hand public transport connection from the hinterland mostly works well. The same applies to handicapped accessibility, which is basically ensured in all ports.

Table 8: Performance of participating ports

| Service Component | Port | | | | | | | | | |
|---|---------|--------|------------|------------|--------|----------|-------|-------------|-----------------|---------|
| | Rostock | Gedser | Trelleborg | Karlskrona | Gdynia | Sassnitz | Ystad | Świnoujście | Hook of Holland | Harwich |
| Public transport connection | 0 | + | + | + | + | - | - | - | + | 0 |
| Public transport information | 0 | - | - | 0 | 0 | - | - | 0 | + | + |
| Public transport guidance | - | - | 0 | - | - | 0 | - | - | + | + |
| Public transport convenience | - | 0 | - | 0 | 0 | - | - | - | + | + |
| Non-public transport facilities and services | 0 | - | 0 | + | + | 0 | 0 | + | + | + |
| Hinterland transport handicapped accessibility | 0 | - | 0 | + | 0 | - | 0 | - | + | 0 |
| Terminal convenience and services | 0 | - | - | 0 | 0 | - | - | 0 | 0 | + |
| Terminal information | - | 0 | 0 | 0 | + | 0 | 0 | - | - | + |
| Terminal guidance | - | 0 | 0 | - | + | - | - | - | + | + |
| Terminal handicapped accessibility | - | 0 | 0 | 0 | - | - | 0 | 0 | + | + |
| Boarding/Disembarkation information and guidance | - | 0 | - | 0 | + | 0 | 0 | 0 | + | + |
| Boarding/Disembarkation convenience | - | 0 | - | + | + | 0 | 0 | 0 | + | + |
| Boarding/Disembarkation handicapped accessibility | - | 0 | - | 0 | - | - | 0 | - | + | + |

Legend: + good performance, 0 sufficient performance, - poor performance

The performance of service components determines the scope for improvement. Poor performance indicates significant deficits. Actions to upgrade these services have priority. For each of the South Baltic ports exemplary priority actions to achieve sufficient service levels are outlined below. Please refer to the action plans in the report for a complete list of priority actions and further measures to improve services beyond sufficient levels.

Apart from some deficits regarding handicapped accessibility, in Gdynia all but one service area perform sufficient or well. Automatic doors at the terminal entrance and at the boarding gate would enable wheelchair users to pass along without assistance. The only other priority action is the installation of signs to allow easy wayfinding between terminal and bus stop. This action is planned already.

In Karlskrona, all service components with the exception of public transport guidance and terminal guidance show a sufficient or good performance. Hence, the only priority actions are the adjustment of misleading signage towards check-in inside the terminal and the installation of public transport signage. Latter include signs towards public transport in the terminal and a bus stop sign to ensure easy wayfinding.

In Rostock, for instance, shuttle bus information and guidance have to be upgraded. User-friendly up-to-date information on shuttle bus operation and better signage of stops is required. The installation of an elevator in the passenger tower serving Scandlines' Trelleborg ferries is recommended regarding boarding and disembarkation. The provision of local tourist information is another priority action.

The new shuttle bus (grand opening: 29. April 2011) between the city centre and the port of Rostock will however be a first significant improvement. The bus will bring and pick up passenger of Rostock-Gedser ferry directly at the ship and carries them to the city centre and vice versa. The operation of the shuttle is will be directly harmonized with the ferry schedule. Moreover passenger will have the possibility to purchase an intermodal ticket covering the complete transport chain (bus, ferry, bus) between Rostock City Centre - Port of Rostock - Port of Gedser and Nykøbing City Centre (www.easyway-ticket.com).

Among priority actions in Gedser are the improvement of terminal convenience and services. For instance, seating and sanitary facilities has to be extended and refreshments should be available for purchase. Furthermore, public transport information before the journey is required on Scandlines' webpage. The provision of the user-friendly brochure "Welcome to Denmark" for download would be a solution.

Passenger towers equipped with elevators are required at all ferry berths in Trelleborg to improve boarding and disembarkation procedures. Missing facilities are either planned or already under construction. Furthermore, a sufficient level of public transport convenience requires that busses serve the terminal directly and easy ticketing is ensured for passengers of all ferry lines. For instance, latter is achieved by acceptance of Euro / credit card onboard busses.

Public transport services in Sassnitz should serve the ferry terminal in correspondance to all ferries. Another requirement is the availability of public transport information before the journey on Scandlines' webpage. Regarding handicapped accessibility actions on all stages

of the transport chain are required. For instance, level access to the ferry “FS Sassnitz” would facilitate boarding and disembarkation of passengers with reduced mobility.

Among actions recommended regarding the conventional terminal in Ystad is the installation of new user-friendly signage in the terminal. This would ensure easy wayfinding. With respect to ferries serving the conventional terminal, public transport services leave significant scope for improvement. Timetables should be better adjusted to reduce transfer time. Another requirement is the installation of signage to facilitate wayfinding between conventional terminal and railway station.

In Świnoujście, for instance, terminal information has to be improved by the provision of tourist information for incoming and outgoing passengers. The installation of a stand with local tourist information is planned already. Another area with significant scope for improvement is public transport. Shorter transfer time and additional services to the ferry terminal railway station would improve the service level. Regarding handicapped accessibility level access to public transport and ferries is required.