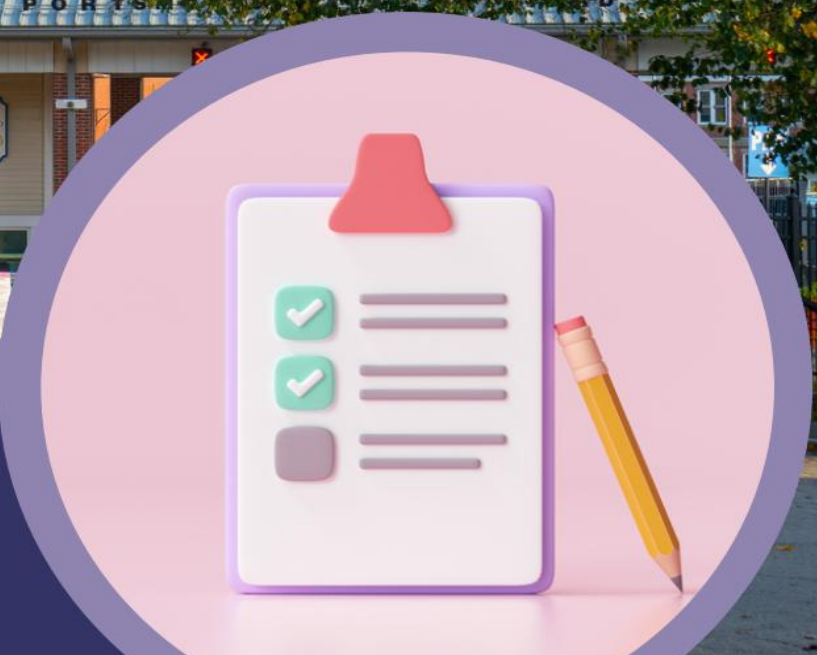


# SHIPYARD SURVEY

## JOINT LAND USE STUDY PHASE IV



PREPARED FOR  
Southern Maine Planning  
and Development  
Commission

PREPARED BY  
AECOM Technical  
Services, Inc.

**Disclaimer 1.** This document was prepared under contract with AECOM Technical Services, Inc., with financial support from the Office of Local Defense Community Cooperation, Department of Defense.

**Disclaimer 2.** The content herein reflects the views of the Southern Maine Planning and Development Commission and does not necessarily reflect the views of the Office of Local Defense Community Cooperation or the Department of Defense.

# Table of Contents

1.	Introduction.....	1
2.	Survey Background.....	1
2.1	Survey Development.....	1
3.	Results.....	1
3.1	What zip code do you live in? .....	1
3.2	How many minutes is your typical commute?.....	3
3.3	What time do you typically arrive at PNSY?.....	3
3.4	What time do you typically depart PNSY?.....	4
3.5	What mode of travel do you typically take/use? .....	4
3.6	Where do you park? .....	5
3.7	What are the top two greatest challenges with your current commute?.....	5
3.8	What are the top two changes that would improve your commute to PNSY?.....	6
3.9	Would you be more likely to carpool if you received a reserved parking spot in the parking garage? .....	6
3.10	Do you currently own or rent the home you live in? .....	7
3.11	What type of home do you currently live in?.....	7
3.12	Please rate how appealing each of the following housing options is to you.....	8
3.13	Are you aware of the Transportation Incentive Program (TIP)? .....	9
3.14	What is your age?.....	9
3.15	How many people live in your household including yourself? .....	9
3.16	Which of the following best describes your total annual household income? .....	10
3.17	How many cars does your household have access to? .....	10
3.18	Which of the following best describes your employment?.....	11
4.	Key Findings.....	11
	Appendix A: Survey Instrument.....	13

# 1. Introduction

The Portsmouth Naval Shipyard (PNSY), located on Seavey Island, is a key economic driver for the Town of Kittery and the surrounding region, attracting thousands of employees on a daily basis. There are only two access points — Gate 1 is located in the Foreside neighborhood of Kittery, and Gate 2 is located on Wyman Avenue, off of Route 103 — and current parking infrastructure on the island is insufficient to meet the daily demand. These conditions lead to congestion issues, excessive circulation and time dedicated to finding parking, and workers resorting to off-site parking in Foreside. These challenges are often compounded by already long commutes for PNSY employees, many of whom live far from the Shipyard to afford housing and are limited to driving alone.

The 2025 Joint Land Use Study (JLUS) Shipyard Survey (Survey) Report provides a profile of PNSY employees, their commuting habits, experiences, challenges, and housing preferences. It also provides feedback from respondents on how the commute experience could be most improved. A full copy of the survey questions and answer options is provided in Appendix A.

## 2. Survey Background

### 2.1 Survey Development

The Survey was conducted digitally and distributed by PNSY via email to all Shipyard employees through the internal PNSY email system. The survey was initially distributed on Friday, April 11, 2025, and two subsequent reminders were sent the following two weeks.

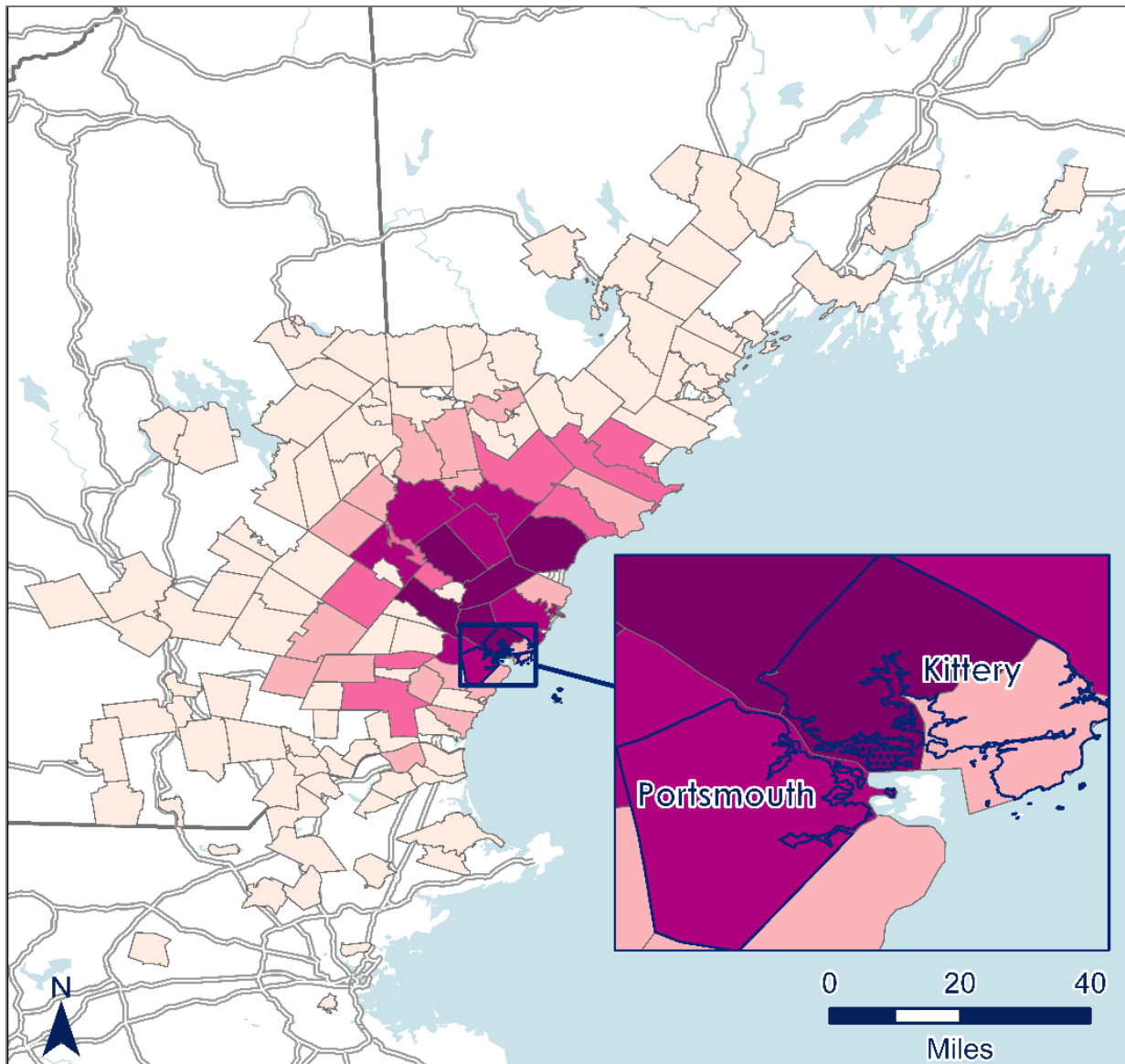
## 3. Results

The survey was deployed from April 11<sup>th</sup> through May 13<sup>th</sup>, 2025 and received a total of 1,497 responses. The results of each of the survey questions are broken down in this section.

### 3.1 What zip code do you live in?


The map in Figure 1 below highlights where PNSY employees responding to the JLUS survey live, by zip code. Just over half (50.6 percent) of respondents live within ten zip codes, located in the Maine and New Hampshire municipalities of Kittery, Eliot, Dover, South Berwick, Wells, Berwick, Sanford, Portsmouth, Rochester, and York. The greatest concentration of respondents lives in zip code 03904 (8.3 percent), within which PNSY is located. Some of the furthest represented communities relative to PNSY include Nobleboro, ME, Boston, MA, Stow, MA, and Contoocook, NH (0.1 percent each).

Figure 1. Survey Respondent ZIP Code








Source: 2025 JLUS Survey  
Retrieved: May 2025

### Home Zip Codes of Survey Respondents

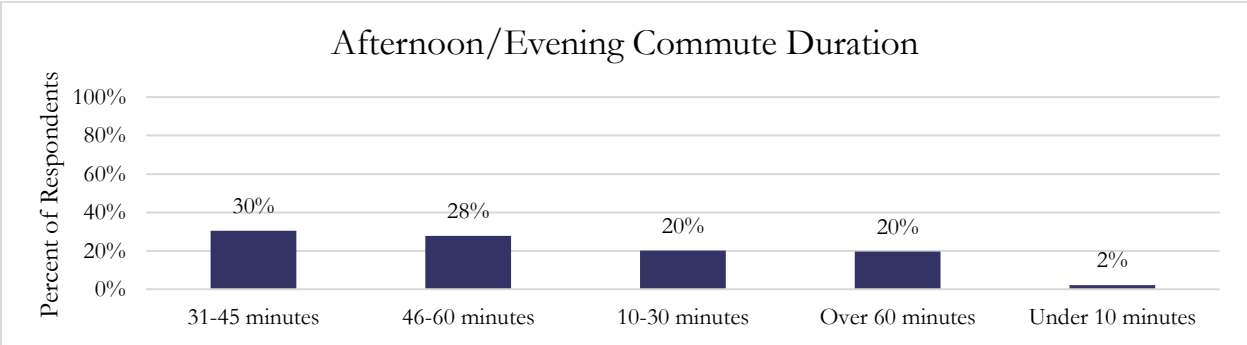
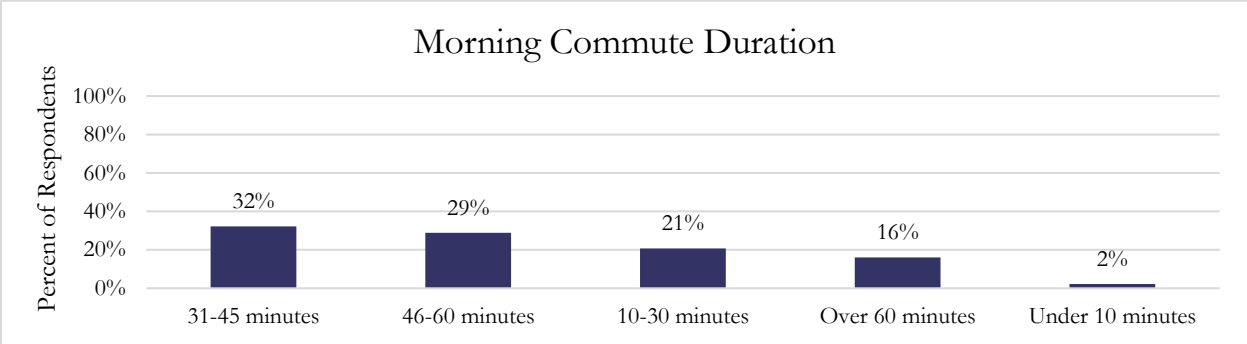
 Portsmouth Naval Shipyard

#### Zip Codes Count

-  1 - 6
-  7 - 16
-  17 - 34
-  35 - 65
-  66 - 119

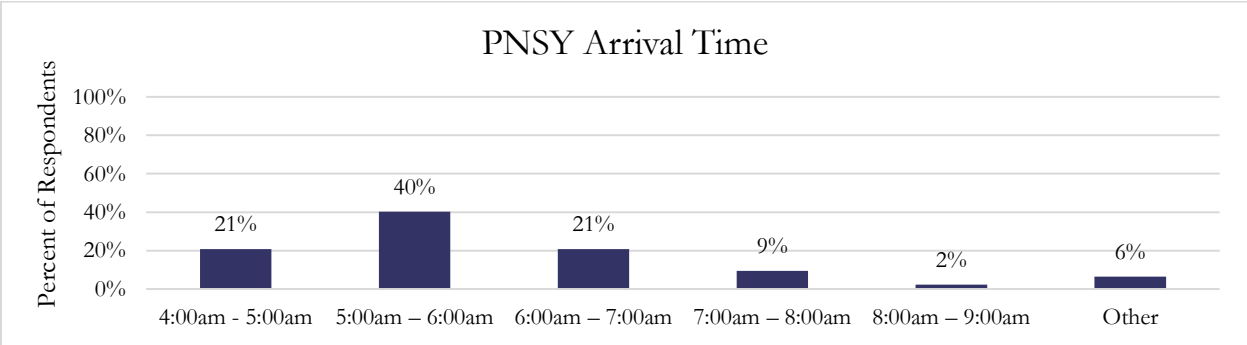
### 3.2 How many minutes is your typical commute?

A majority of respondents (61 percent) travel between 31 and 60 minutes for their morning commute to PNSY, with 58 percent traveling this same timespan in the afternoon or evening. Only 2 percent commute under ten minutes during both commute periods, and less than a quarter of respondents (23 percent in the morning and 22 percent in the afternoon) have a commute of 30 minutes or shorter. There are more PNSY employees commuting longer than one hour during the afternoon/evening period compared to the morning period — an increase of 4 percent — while the proportion of employees commuting between 10 and 60 minutes decreases by 4 percent overall from morning to afternoon/evening.



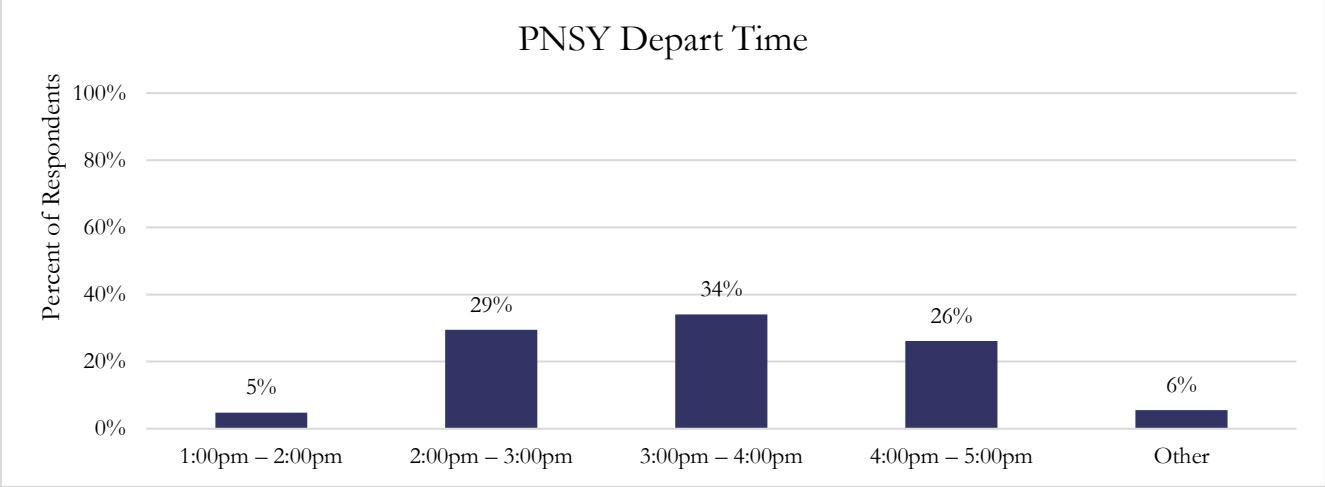
### 3.3 What time do you typically arrive at PNSY?

The most common employee arrival time at PNSY is between 5:00am and 6:00am, and there is an even split between employees arriving between 4:00am and 5:00am, and between 6:00am and 7:00am. Fewer employees (11 percent) arrive onsite after 7:00am.



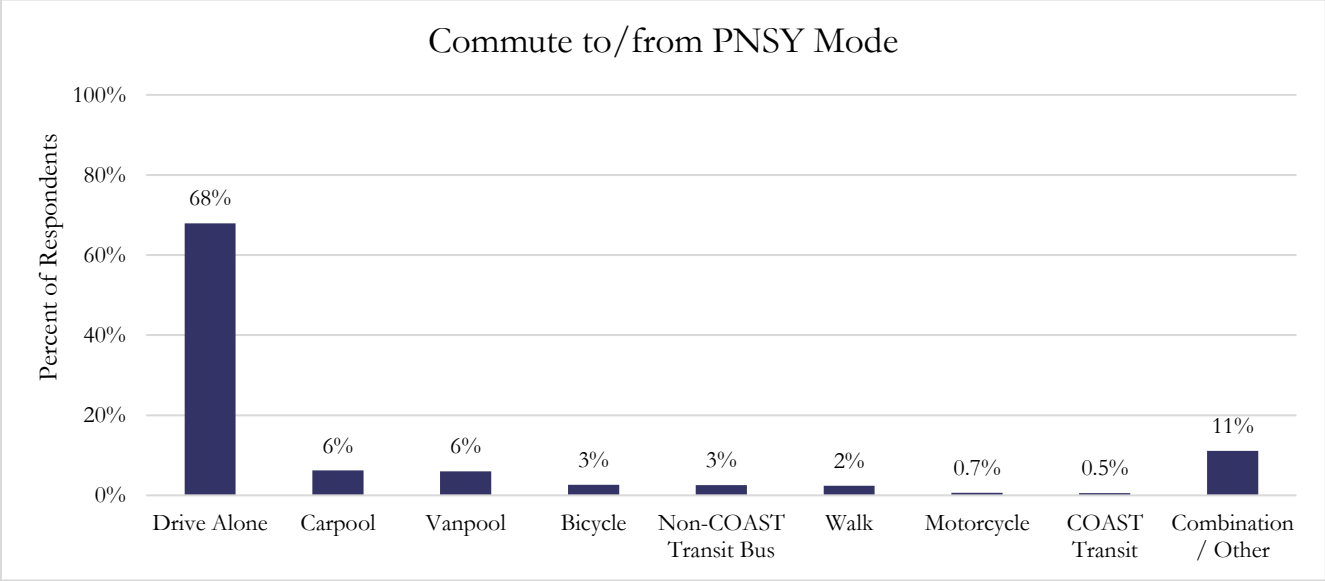
### 3.4 What time do you typically depart PNSY?

The most common employee departure time from PNSY is between 3:00pm and 4:00pm, followed closely by the 2:00pm to 3:00pm window and the 4:00pm to 5:00pm window. A significant minority (5 percent) depart PNSY earlier than 2:00pm.



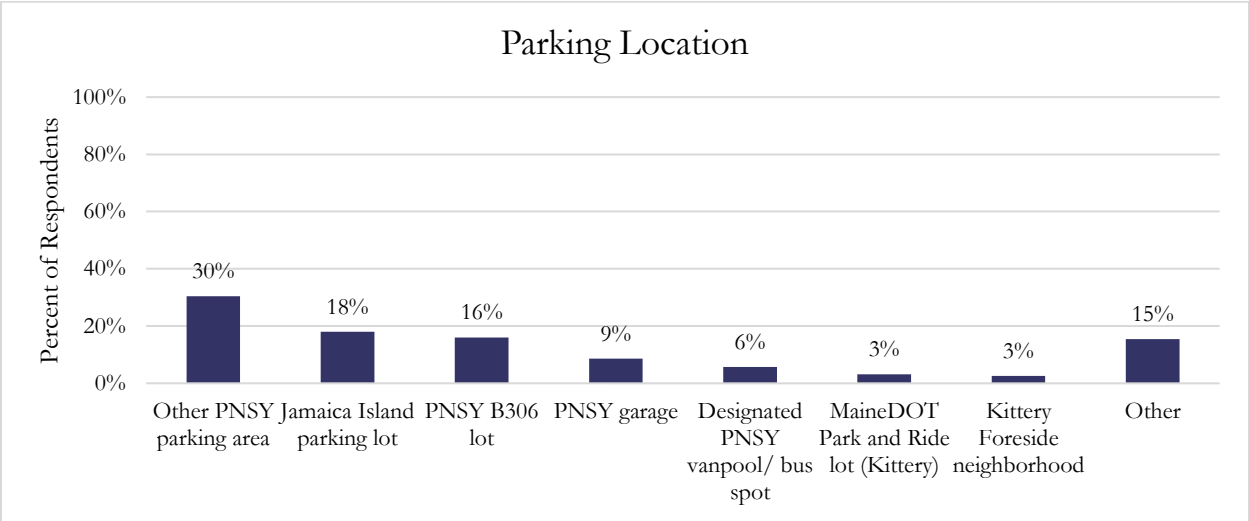
### 3.5 What mode of travel do you typically take/use?

A significant majority of employees drive alone on their commute to and from PNSY. Carpooling and vanpooling are tied for next-most common mode of travel, with 12 percent of respondents commuting via these modes combined. Those who commute via active transportation (biking or walking) make up 5 percent of survey respondents, while bus transit (COAST or other provider) is the least common mode of travel (3.5 percent).



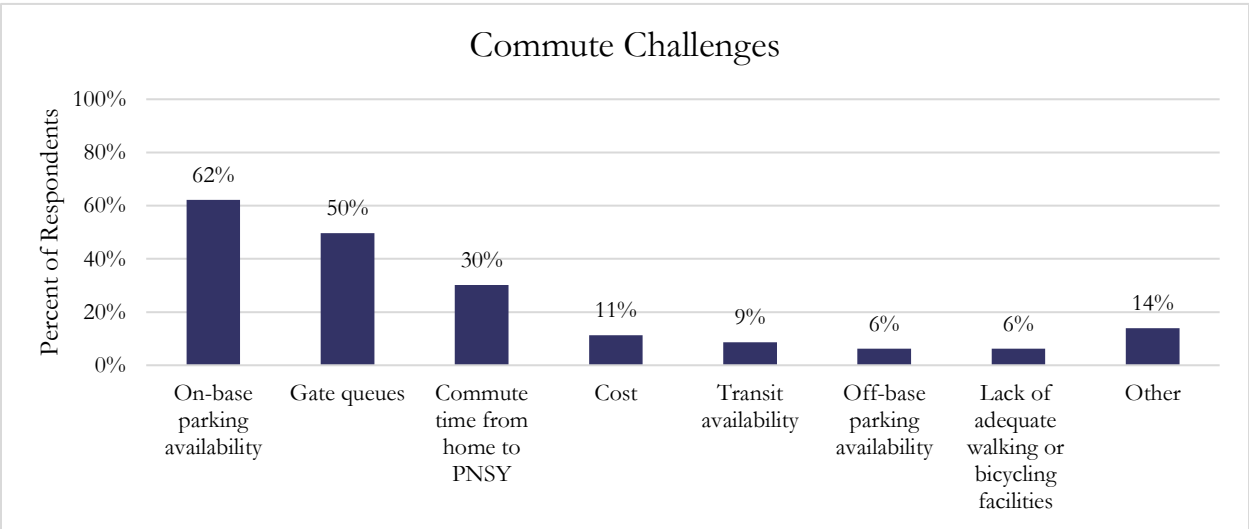
### 3.6 Where do you park?

The most common parking destination for respondents who park a vehicle is a PNSY parking area other than those provided in the survey answer options. Employees who park at the MaineDOT Park and Ride lot adjacent to Kittery Premium Outlets along U.S. Route 1 or in the Foreside neighborhood in Kittery are least common, representing a combined 6 percent of all respondents who park a vehicle. Among respondents parking in “Other” locations, many reported using any available parking spot (marked or unmarked) or are paying for off-base parking out-of-pocket.



### 3.7 What are the top two greatest challenges with your current commute?

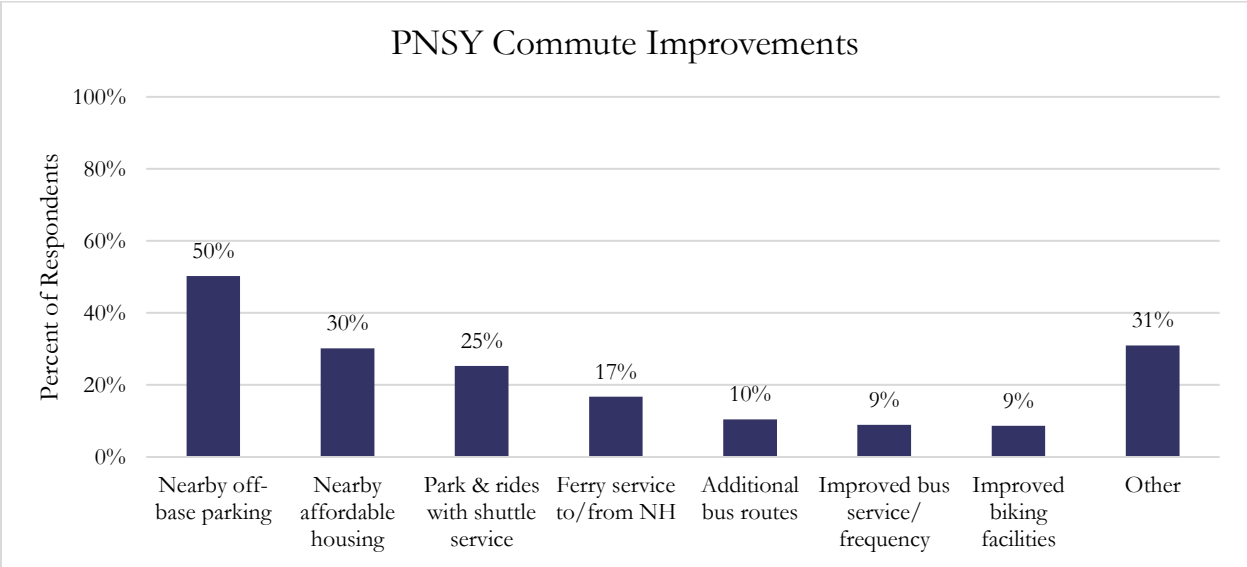
Overall, the most commonly reported commute challenges among PNSY employees are on-base parking availability (selected by 62 percent of respondents) and gate queues (selected by 50 percent). Both issues reflect congestion when accessing the Shipyard. Commute time from home to PNSY is the third most frequently cited challenge among survey respondents.



Note: the total percentage of responses sums to more than 100 percent due to respondents selecting two top challenges.

### 3.8 What are the top two changes that would improve your commute to PNSY?

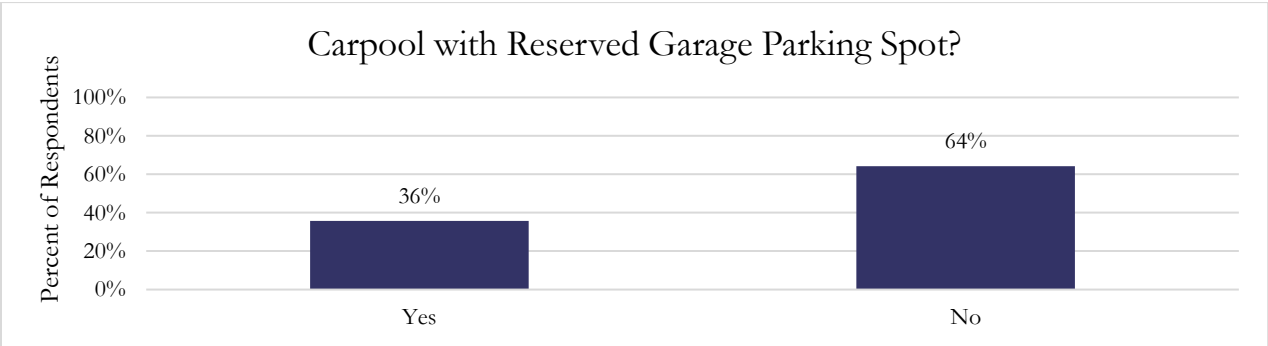
Overall, the most cited changes that respondents would prioritize to improve their commute to and from PNSY are more nearby off-base parking within walking distance to PNSY (selected by 50 percent of respondents) and more options for affordable housing near PNSY (selected by 30 percent). “Walking distance” was not defined in the survey, but is generally considered to be up to half a mile. These improvements are not mutually exclusive. Park and Ride facilities with frequent shuttle connections to and from PNSY is the third most popular change identified by survey respondents. Over one-third of respondents identified other priority improvements, among which the most common themes include gate decongestion efforts, additional or better designed on-base parking, and remote work or off-base work location options.



Note: the total percentage of responses sums to more than 100 percent due to respondents selecting two top desired improvements.

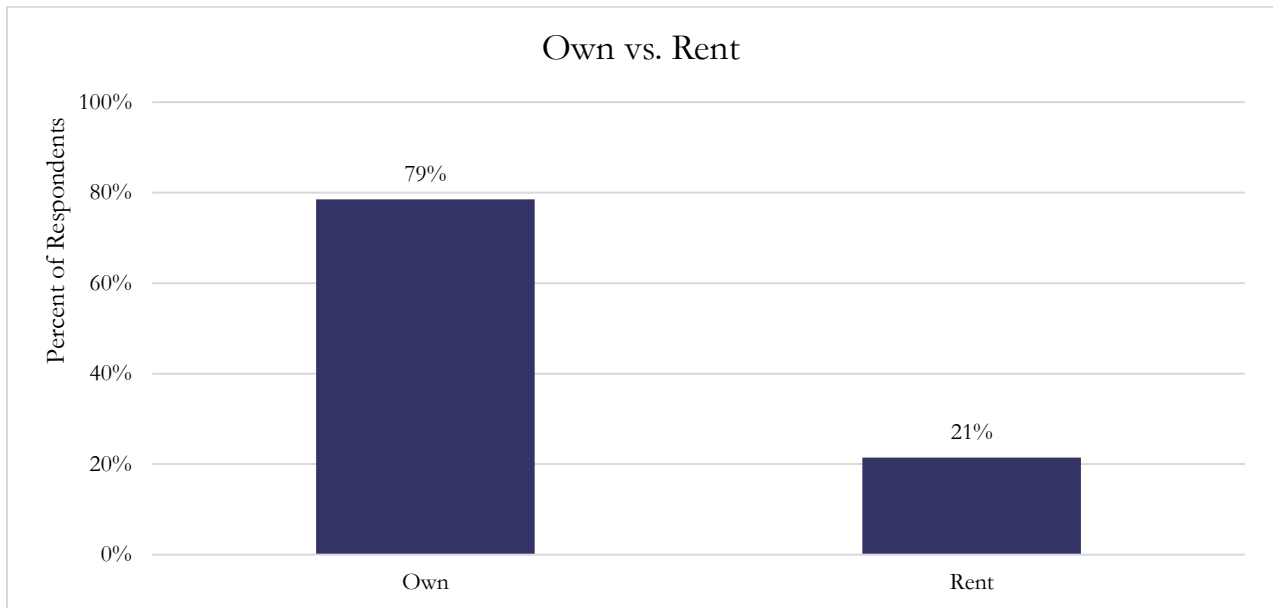
### 3.9 Would you be more likely to carpool if you received a reserved parking spot in the parking garage?

Nearly two-thirds of respondents indicated that having a reserved parking spot in the PNSY parking garage would not improve their likelihood to carpool. However, 36 percent indicated that such an arrangement would make them more likely to carpool.



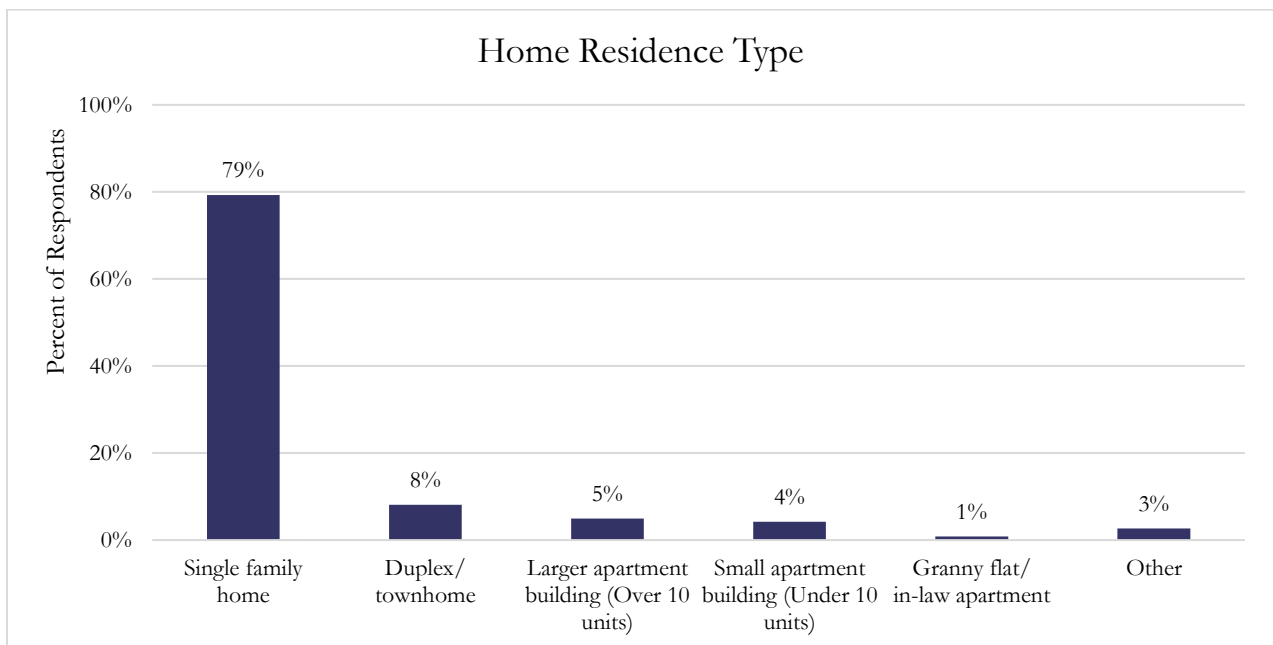
### 3.10 Do you currently own or rent the home you live in?

A majority of respondents (nearly 80 percent) own their home.



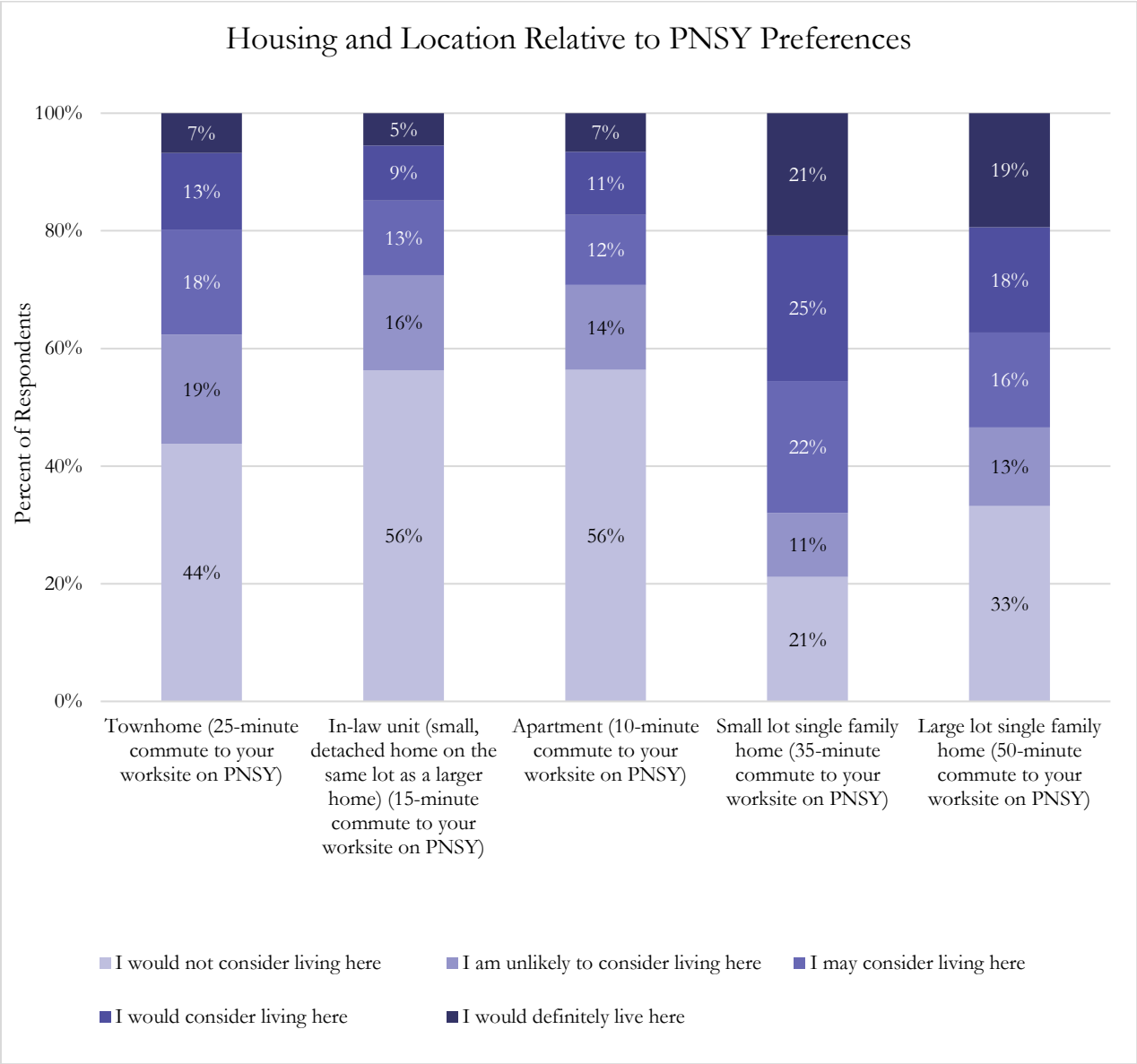
### 3.11 What type of home do you currently live in?

A majority of respondents (nearly 80 percent) live in a single-family home.



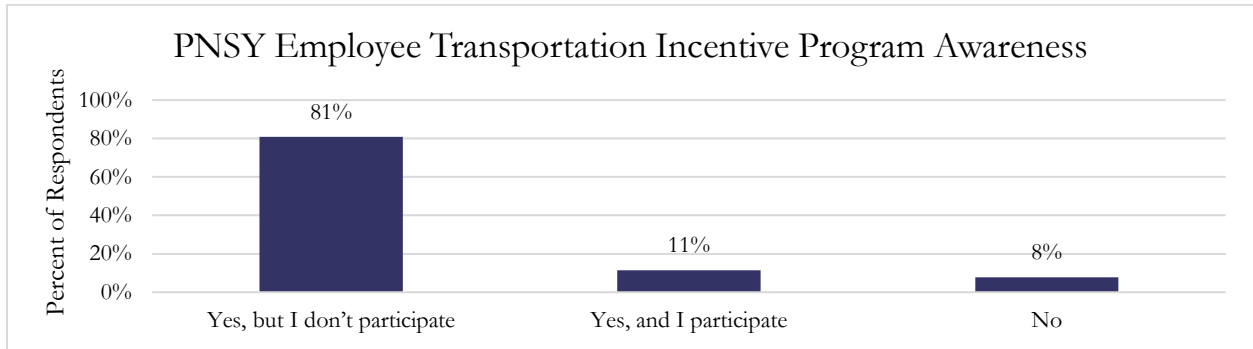
### 3.12 Please rate how appealing each of the following housing options is to you.

Respondents were asked to rank preferences for different housing options and commute times (the survey did not define the time of day – peak vs. off-peak – for the commute, but it can be assumed that a respondent would imagine typical traffic conditions in the morning and afternoon). When comparing the housing options provided in the survey, respondents are most commonly open to living in a single-family home on a small lot located 35 minutes from PNSY – 21 percent would definitely live in this type of home, and 25 percent would consider it. A single-family home on a large lot located 50 minutes from PNSY is the second most desirable home option among respondents, with 19 percent indicating they would definitely live in this type of home, and 18 percent willing to consider it. The proportion of respondents who would definitely live in either a townhome located 25 minutes from PNSY, an in-law unit 15 minutes from PNSY, or an apartment 10 minutes from PNSY is limited to a range between 5 and 7 percent. Nearly three quarters of respondents would not or are unlikely to live in either the in-law unit or the apartment option, and nearly two-thirds would not or are unlikely to live in the townhome option.



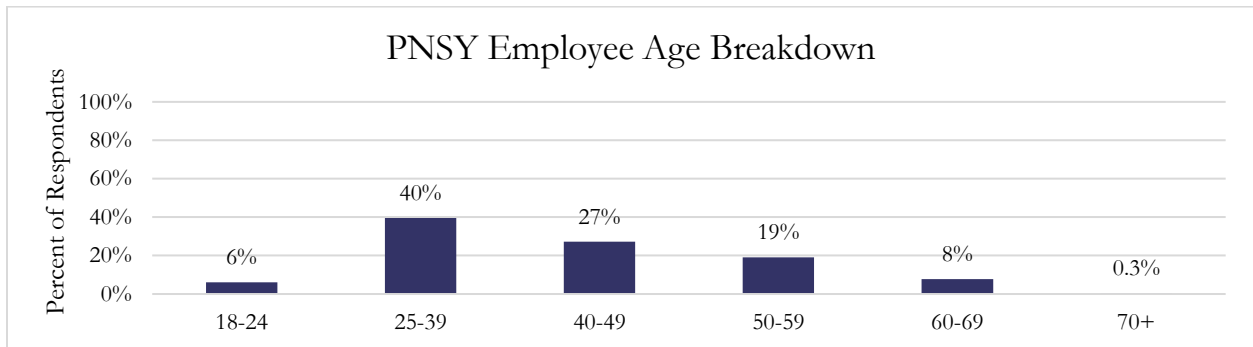
### 3.13 Are you aware of the Transportation Incentive Program (TIP)?

A majority of employees are aware of the Transportation Incentive Program but do not participate, and only 11 percent participate in the program.



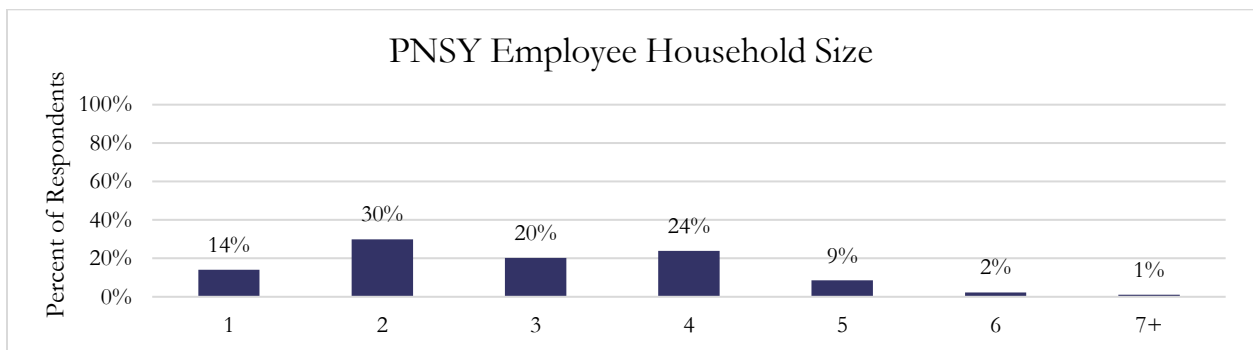
### 3.14 What is your age?

The largest age group represented among respondents is 25 to 39, followed by 40 to 49. Over two-thirds of respondents belong to one of these two age groups. Over a quarter of respondents are between the ages of 50 and 69.



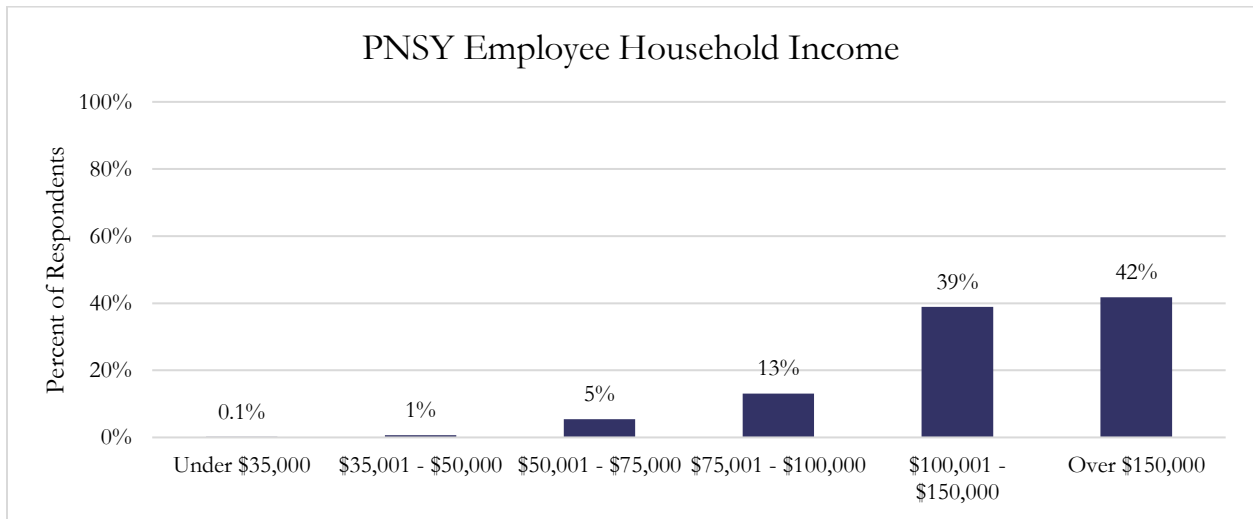
### 3.15 How many people live in your household including yourself?

PNSY employees most commonly live in two-person households. Four- and three-person households are the second and third most common household sizes, in that order. Only 3 percent of respondents live in households of six or more people.



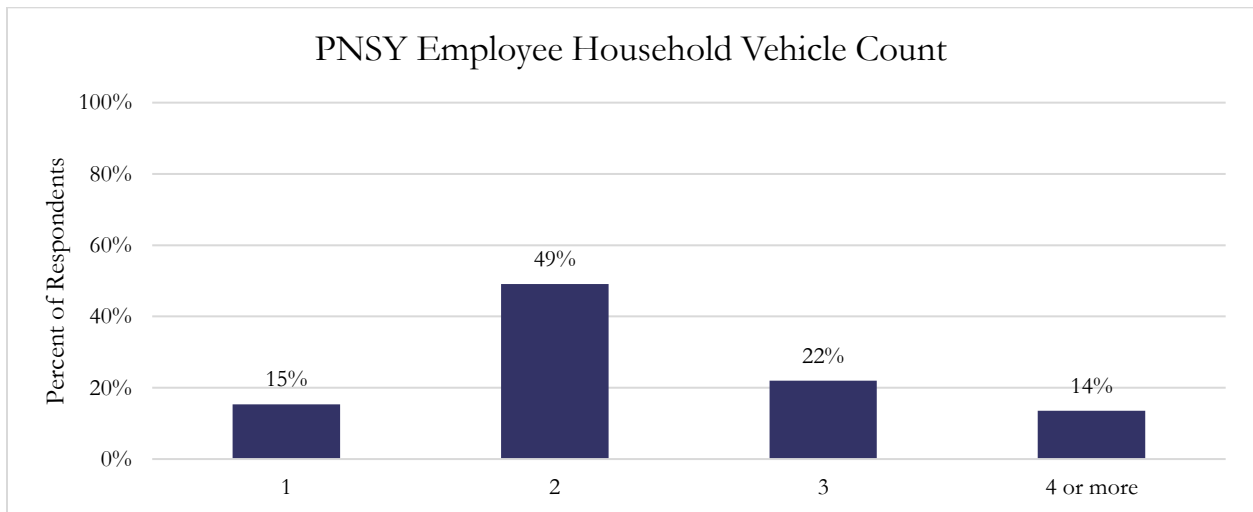
### 3.16 Which of the following best describes your total annual household income?

The significant majority of respondents (81 percent) have a total annual household income of over \$100,001, of which over half have a household income of over \$150,000. Only 6 percent of respondents indicated their household income as being less than \$75,000.



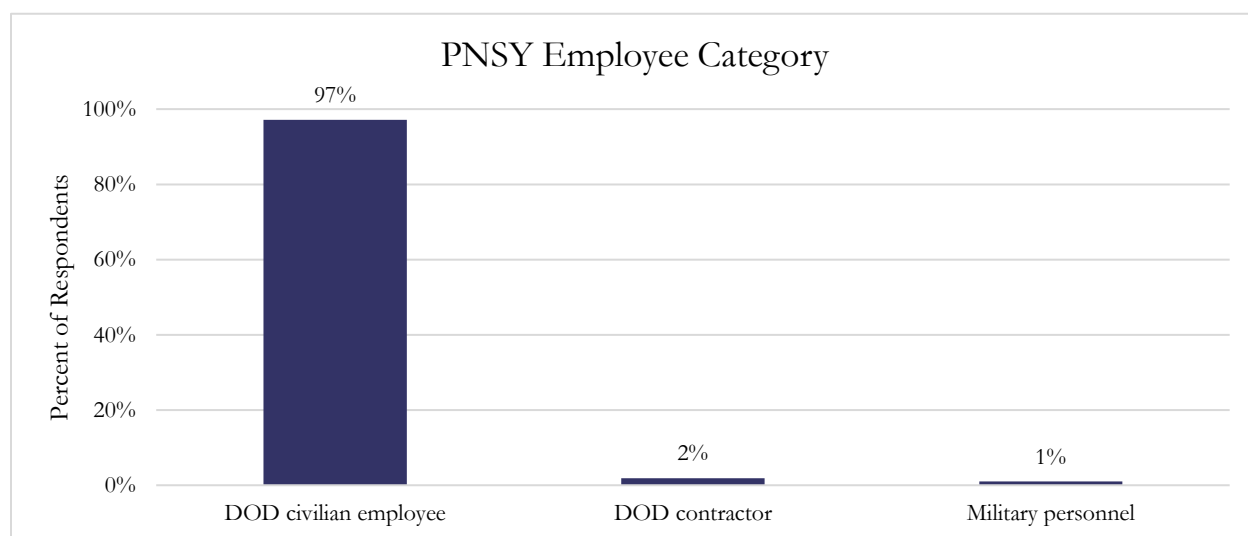
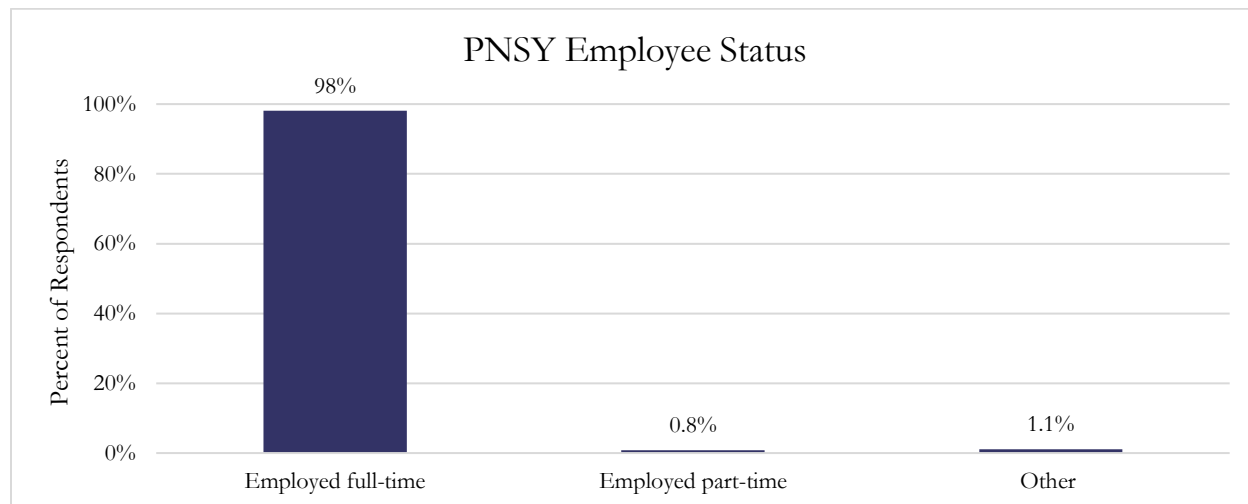
### 3.17 How many cars does your household have access to?

Nearly half of respondents (49 percent) have access to two vehicles in their household.



### 3.18 Which of the following best describes your employment?

Nearly all respondents (98 percent) are employed full time at PNSY, and almost the same proportion of respondents (97 percent) are Department of Defense (DOD) civilian employees. DOD contractors and military personnel make up 2 percent and 1 percent of the workforce among respondents, respectively.



## 4. Key Findings

Key findings from the survey include the following:

- **Where People Live:** Over half of respondents live within ten zip codes, the furthest of which is within 30 miles of PNSY. Nearly 15 percent of respondents live within 100 different zip codes extending further out from PNSY in parts of Maine, New Hampshire, and Massachusetts.

## Joint Land Use Study Implementation

---

- **How Long People Commute:** Respondents are most commonly traveling either between 31 and 45 minutes or between 46 and 60 minutes for their commutes to and from PNSY, and employees are largely driving alone.
- **Where People Park:** Over three quarters of respondents are parking their vehicles at various designated parking locations on Seavey Island. Among the respondents who provided write-in answers on parking, most highlighted the need to settle on any available parking spot (whether marked or unmarked) or to pay for private off-base parking out of pocket.
  - Nearly two-thirds of respondents indicated that having a reserved carpool vehicle parking spot in the PNSY parking garage would not improve their likelihood to carpool.
- **Biggest Commute Challenges:** More respondents feel that the greatest two challenges with their commutes are on-base parking availability and gate queues. The most commonly identified priority improvements among respondents are more off-base parking availability and more affordable housing options near PNSY. Among the respondents who provided write-in answers on commute improvements, the majority emphasized the critical need for improved traffic flow and decongestion efforts at the gates.
- **Housing Preferences:** A majority of respondents currently live in single family homes. Given the option between living in single family homes further from PNSY and living in apartment-style homes or duplex/townhomes closer to the base, they would more likely opt for the former. However, a significant minority of respondents were open to considering these smaller homes closer to PNSY, suggesting the importance of offering a diversity of housing types for Shipyard employees.

# Appendix A: Survey Instrument

## JLUS Phase 4 PNSY Survey

1. What zip code do you live in?

2. How many minutes is your typical **morning** commute? (Please include the time it takes for you to get through the gate and arrive at your worksite on PNSY.)

- Under 10 minutes
- 10-30 minutes
- 31-45 minutes
- 46-60 minutes
- Over 60 minutes

3. How many minutes is your typical **afternoon/evening** commute? (Please include the time it takes for you to get through the gate and arrive at your home.)

- Under 10 minutes
- 10-30 minutes
- 31-45 minutes
- 46-60 minutes
- Over 60 minutes

4. What time do you typically arrive at PNSY?

- 4:00am - 5:00am
- 5:00am - 6:00am
- 6:00am - 7:00am
- 7:00am - 8:00am
- 8:00am - 9:00am
- Other (please specify)

5. What time do you typically depart PNSY?

- 1:00pm - 2:00pm
- 2:00pm - 3:00pm
- 3:00pm - 4:00pm
- 4:00pm - 5:00pm
- Other (please specify)

6. What mode of travel do you typically take/use?

- COAST Transit
- Bus other than COAST Transit
- Carpool
- Motorcycle
- Bicycle
- Vanpool
- Walk
- Drive Alone
- Other (please explain if you use a combination of the above modes)

## JLUS Phase 4 PNSY Survey

### 7. Where do you park?

- At the MaineDOT Park and Ride lot adjacent to Kittery Premium Outlets
- In the Foreside neighborhood in Kittery
- In the garage on PNSY
- In the B306 lot on PNSY
- In the Jamaica Island parking lot on the far side of the island
- In another parking area on PNSY
- In a designated vanpool/bus spot on PNSY
- Other (please specify)

## JLUS Phase 4 PNSY Survey

8. What are the **top 2** greatest challenges with your current commute? (**Please select only two**).

- Cost
- Gate queues
- On-base parking availability
- Off-base parking availability
- Commute time from home to PNSY
- Lack of adequate walking or bicycling facilities (e.g. sidewalks, bike lanes)
- Transit availability
- Other (please specify)

9. What are the **top 2** changes that would improve your commute to PNSY? (**Please select only two**).

- Park & ride facilities with frequent shuttle connections to/from PNSY
- More nearby off-base parking within walking distance to PNSY
- Improved existing bus service/frequency
- Additional bus routes to expand service connections
- Ferry service to/from New Hampshire
- Improved bicycling facilities (e.g. bike racks, bike lanes)
- Better housing affordability options near PNSY
- Other (please specify)

10. Would you be more likely to carpool (2+ occupants) if you received a reserved parking spot in the parking garage?

- Yes
- No

11. Do you currently own or rent the home you live in?

- Own
- Rent

12. What type of home do you currently live in?

- Single family home
- Duplex/townhome
- Granny flat/in-law apartment
- Small apartment building (Under 10 units)
- Larger apartment building (Over 10 units)
- Other (please specify)

13. Please rate how appealing each of the following housing options is to you:

1 - I	2 - I am	3 - I	4 - I	5 - I
would	unlikely	may	would	would
not	to	consider	consider	definitely
consider	consider	living	living	live here
living	living	here	here	
here	here			

Townhome (25-minute commute to your worksite on PNSY)

In-law unit (small, detached home on the same lot as a larger home) (15-minute commute to your worksite on PNSY)



Apartment (10-minute commute to your worksite on PNSY)



Small lot single family home (35-minute commute to your worksite on PNSY)



Large lot single family home (50-minute commute to your worksite on PNSY)



14. Are you aware of the Transportation Incentive Program (TIP)?

- Yes, and I participate
- Yes, but I don't participate
- No

15. What is your age?

16. How many people live in your household including yourself?

- 1
- 2
- 3
- 4
- 5
- 6
- 7+

17. Which of the following best describes your total annual household income?

- Under \$35,000
- \$35,001 - \$50,000
- \$50,001 - \$75,000
- \$75,001 - \$100,000
- \$100,001 - \$150,000
- Over \$150,000

18. How many cars does your household have access to?

- 0
- 1
- 2
- 3
- 4 or more

19. Which of the following best describes your employment?

- Employed full-time
- Employed part-time
- Other (please specify)

20. Please select your employment category:

- DOD civilian employee
- DOD contractor
- Military personnel