

## **Report to Partnership Meeting 3 February 2017**

### **RESEARCH AND STRATEGY DELIVERY**

#### **Online Ferry Availability Review April – October 2016**

##### **Purpose of Report**

To introduce the draft Online Ferry Availability Report (April – October 2016) which was undertaken in partnership with Comhairle nan Eilean Siar, Argyll & Bute Council and Outer Hebrides Tourism (OHT).

##### **Background**

Since 2011, Outer Hebrides Tourism has carried out research on the availability to book car spaces on the CalMac website on selected routes to and from the Western Isles.

Between 2013 and 2016 this research has been financially supported by HITRANS and Comhairle nan Eilean Siar and Argyll & Bute Council. Each year the work has been extended to include additional routes with the 2016 study collecting data on the Mallaig – Armadale service for the first time. In total, the 2016 study gathered data on 11 routes and 22 separate services. A copy of the full 2016 report will be made available online once the final version has been approved by the client group.

The work undertaken by OHT (on behalf of HITRANS, CnES and A&BC) in 2016 and previous years has informed stakeholders of the following:

- Highlighted significant issues relating to the lack of online booking availability for vehicles on several routes operated by CalMac during the peak summer months.
- Informed key stakeholders of both the current capacity constraints and likely future demands on the Clyde and Hebridean Ferry Services (CHFS) network. This work is now complimented by Transport Scotland's Vessel Replacement and Deployment Plan which Transport Scotland has committed to updating on an annual basis.

##### **Going Forward**

The Vessel Replacement and Deployment Plan which is sponsored by Transport Scotland has the objective of advising Transport Scotland (TS), Caledonian Maritime Assets Limited (CMAL) and CalMac Ferries Limited (CFL) on what a programme of major vessel retentions, cascades, acquisitions and disposals may look like in order that the delivery of the Scottish Ferry Services: Ferries Plan (2013-2022), as it relates to the CHFS Contract, could be fulfilled in the timescales indicated by the Scottish Government. An annual report is now published which considers the latest data and modelling of future demand on the network to help inform decisions on vessel deployment and the vessel replacement strategy for the network.

As a result of the adoption of this strategic approach to future network planning of ferry services and supporting infrastructure for the CHFS contract together with commitments on

CalMac to improve their ticketing and online booking systems following the award of the new contract, it would seem that this is an appropriate stage to discontinue the annual research for online Ferry Availability at least until the new arrangements can be seen to demonstrate progress. It is therefore proposed to not undertake a similar study in summer 2017.

## April – October 2016 Draft Summary from work undertaken by Outer Hebrides Tourism

### Glossary of terms

- Unavailable To Book Online by day of sailing (UTBO\*)
- Number of days sailings full online prior to departure (NDSFO)
- Days all sailings are full online prior to departure (DASFO)

Sailings serving the islands of Lewis, Harris, North Uist, South Uist, Barra, Mull, Coll, Tiree, Islay & Skye were monitored during the months of April through to October 2016. This was achieved by checking the relevant online booking system every day to ascertain if sailings in the coming days and months were available or not for booking a car.

The results have been shared with CalMac and Transport Scotland and dialogue has begun to help understand the demand/capacity issues on the network.

Table 1.3.1 Summary of Ferry Availability 2016

Island	Lewis	Harris	N Uist	S Uist	Barra	Coll/Tiree	Mull	Islay	Overall
<b>No of Sailings</b>	820	651	664	428	431	454	4280	2140	9868
<b>Unavailable</b>	221	218	237	78	45	139	1229	883	3050
<b>% UTBO</b>	27%	33%	36%	18%	10%	31%	29%	41%	31%

The results show the all the routes studied experience significant levels of sailings becoming unavailable to book online. The issue is not confined to one or two routes as the majority of those monitored showed a minimum of 30% UTBO sailings over the April and October period.

There was reduction in ferry availability issues on those routes that had extra capacity added in 2016. These included services to Barra & South Uist both of which had been severely impacted in previous years but had this year seen very few sailings full online.

The introduction of RET on some routes had the expected effect of increasing the traffic demands, but again extra capacity added to the Isle of Mull route mitigated any significant disruption from high levels of ferry unavailability.

Both the Sound of Barra and the Sound of Harris saw substantial increases in sailings that were full online due to the uplift in demand following RET. These routes did not have any extra capacity added.

It had been expected that the reduction in carrying capacity for the Ullapool-Stornoway route would have led to significant ferry availability issues, but the study found only a small increase in UTBO levels

Also, it was clear that early season (April/May/June) levels of unavailable sailings fell significantly for all Northern Outer Hebridean routes despite an actual overall reduction in carrying capacity.

Discussions with Calmac following this observation highlighted that the reservation system was allowing a higher percentage of deck space to be available to book online than in previous years. This added significantly to capacity available to book online and explains the effects observed by this study. Further clarification on how much extra capacity was added and the subsequent effect this has had on actual carryings is required to assess the overall impact.

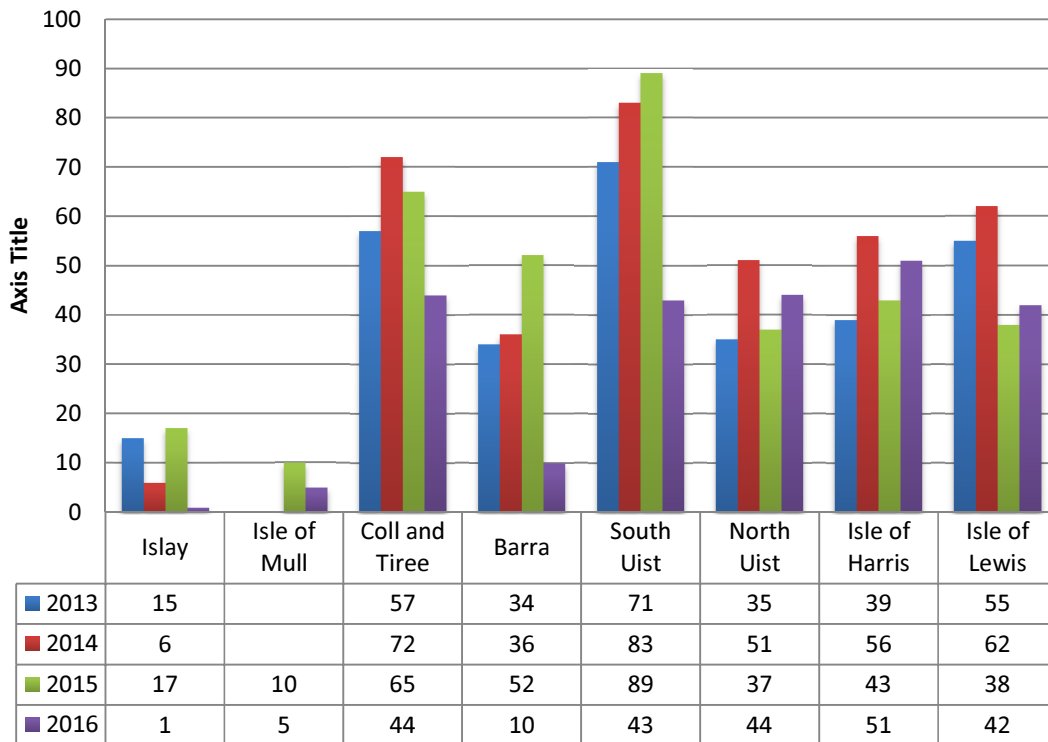
Islay continues to see increasing availability issues with year on year increases in most measures that monitor trends in ferry availability.

A clear distinction was noted between routes with 3 or more return sailings and those with less. It was rare to observe days when all sailings to Islay, Mull and both the Sound of Harris and Sound of Barra were full online. In contrast, routes to Lewis, Harris, Uist, Coll and Tiree showed that a minimum of 40% of all days between June and August had all sailings full online before departure. Barra was the exception to this rule as there was a sharp increase in capacity in 2016.

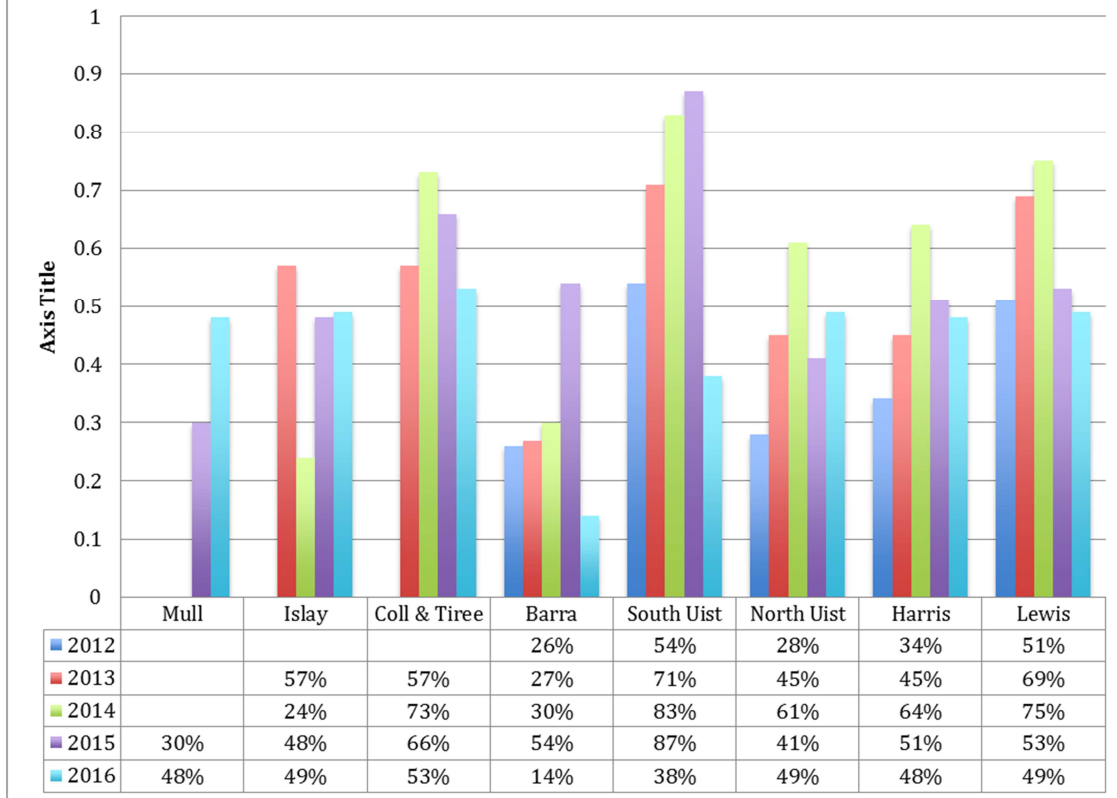
The newly monitored route between Mallaig and Armadale was very challenging to track due to the many service disruptions from operational and tidal issues. The data was recorded, but we have been unable to draw any definitive trends.

The table below highlights the levels of DASFO during the peak season from June through to the end of August. Long distance routes lose a minimum of 40% of days compared with shorter routes at around 10%.

## Percentage of DASFO Sailings June to August



## Percentage of UTBO Sailings June to August



### Recommendation

Members are invited to commend the work undertaken by Outer Hebrides Tourism in recent years which has helped provide an evidence base on a number of pertinent issues on the CHFS network and assist HITRANS and its partner councils in discussions relating to strategic planning of the network as well as the ticketing and booking systems of the contract Operator. It is therefore proposed that a similar study should not be undertaken in 2017 but be reviewed again in future years where the data collected to date will provide invaluable information on trends across the CHFS network.

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**Date:** 25<sup>th</sup> January 2017