

Outer Hebrides STAG Appraisal

Lewis Public Exhibition

24th May 2018, 16:00-20:00

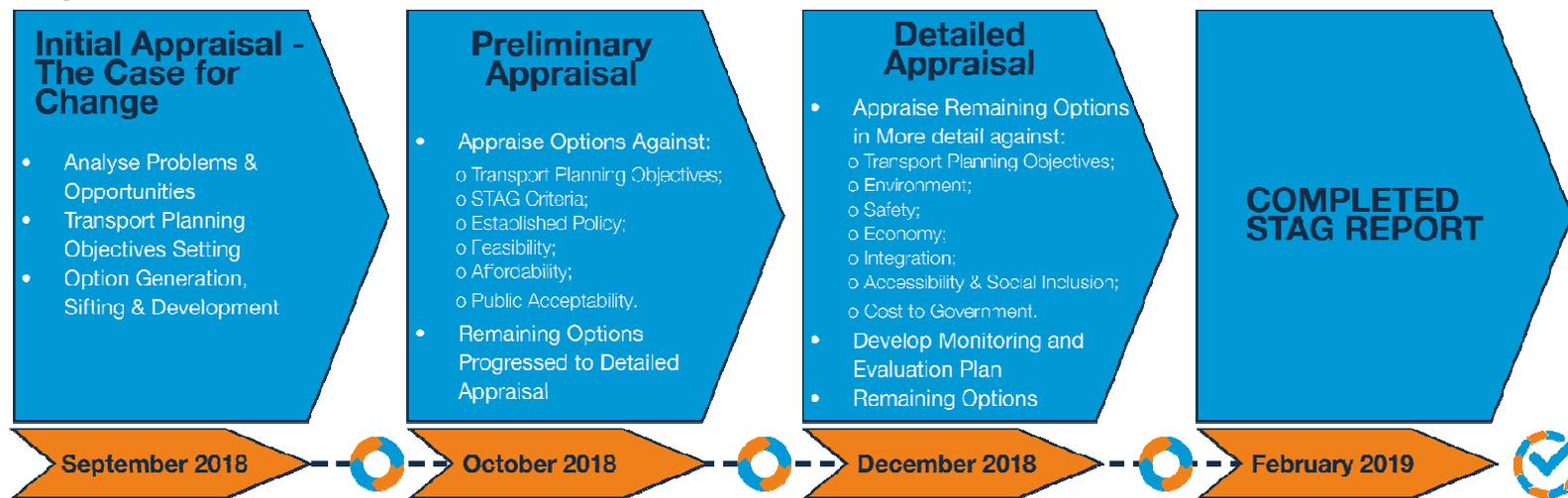
Caladh Inn - Stornoway

What is the study about?

- A transport appraisal of the long-term options for the ferry routes to, from and within the Outer Hebrides, including the Sounds, was a commitment made in the Vessel Replacement & Deployment Plan (VRDP) annual report for 2015
- Peter Brett Associates LLP has been commissioned by Transport Scotland to carry out this appraisal. The study is being informed and guided by a Reference Group, which is being led by Transport Scotland and includes Comhairle nan Eilean Siar, HITRANS, CMAL and CalMac Ferries Ltd
- The appraisal will identify and evaluate options for the long-term (i.e. for the next 30 years)

Scottish Transport Appraisal Guidance (STAG)

- The appraisal is being undertaken using a Transport Scotland process referred to as 'STAG', the approved guidance for the appraisal of potential transport projects
- The principle of STAG is that it is **objective-led rather than solution-led**, ensuring that the option(s) ultimately taken forward address the identified transport problems and are the most appropriate when judged against a range of criteria



- The study is currently at the **Initial Appraisal** stage, which will consider problems & opportunities with the current and potential future service

How and when are we engaging with communities?

- **Stage:** Initial Appraisal
- **Purpose:** To collect views on current and future problems and opportunities associated with the current service(s)
- **What engagement will take place?**
 - Public Exhibitions and comments form (May 2018)
 - Resident household survey (May – July 2018)
 - On-ferry surveys on all routes (July – August 2018)
 - Stakeholder consultation (April – June 2018)

- **Stage:** Preliminary Appraisal
- **Purpose:** To seek initial community and stakeholder feedback on the identified problems & issues and the emerging options
- **What engagement will take place?**
 - High level web-based presentation of material together with online questionnaire (paper copies can be provided for those without internet access) – autumn 2018

- **Stage:** Detailed Appraisal
- **Purpose:** To seek further community and stakeholder feedback on the emerging findings from the appraisal
- **What engagement will take place?**
 - Public Exhibitions and exit questionnaire (early 2019)
 - Stakeholder consultation (early 2019)

What are we presenting today?

- For your **local** route (**Stornoway – Ullapool**), the following boards set out the:
 - vessels and ports
 - level of connectivity provided by the service
 - punctuality and reliability ‘story’ of the route
 - carryings & available capacity ‘story’ of the route
 - *Profiles of all other routes operating to, from and within the Outer Hebrides are provided in booklet form on the tables around the room should you wish to browse these*
- **Please browse the information for the routes relevant to you. When you are finished, please:**
 - **Take the time to give your thoughts to a member of the team if you wish**
 - **Fill out and hand back the comments form before leaving**
 - **All of the material presented is available on the Comhairle and HITRANS websites**

Stornoway – Ullapool Vessels & Ports

Primary Vessel

MV Loch Seaforth

Key Characteristics

- **Entered service:** 2015
- **Capacity:**
 - Approx. 143 vehicles
 - 700 passengers
- **Speed:** 19.2kts
- **Overnight berth:** Stornoway
- **Refit Cover:** MV *Isle of Lewis*, with MV *Hebridean Isles* operating the overnight freight service
- **Other Points of Note:**
 - MV *Loch Seaforth* cannot regularly serve any other route on the network



Ports

- Stornoway
 - Stornoway Port Authority (SPA) has published a draft 20-year masterplan for the future of the port
 - Key aspirations include the provision of a second ferry berth to allow for the potential (re)introduction of a second vessel on the route
 - There are currently works ongoing to improve vehicular access to the ferry terminal (e.g. marshalling, parking etc).
- Ullapool
 - The vehicle marshalling area at Ullapool is relatively constrained.
- Transport Scotland made a significant investment in the infrastructure at both ports to ensure that they were capable of accommodating MV *Loch Seaforth*

Stornoway – Ullapool Connectivity

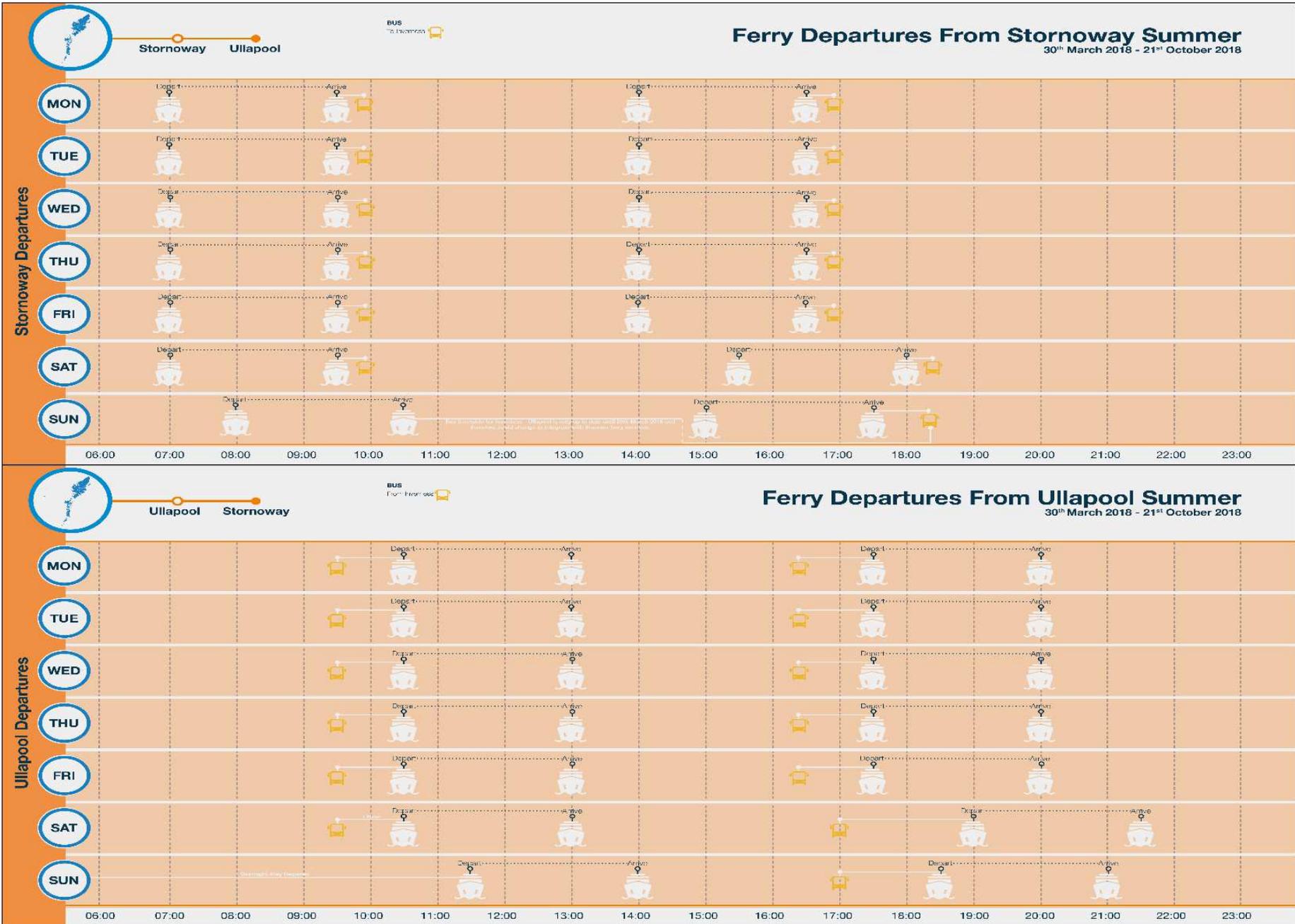
Timetable – Key Points

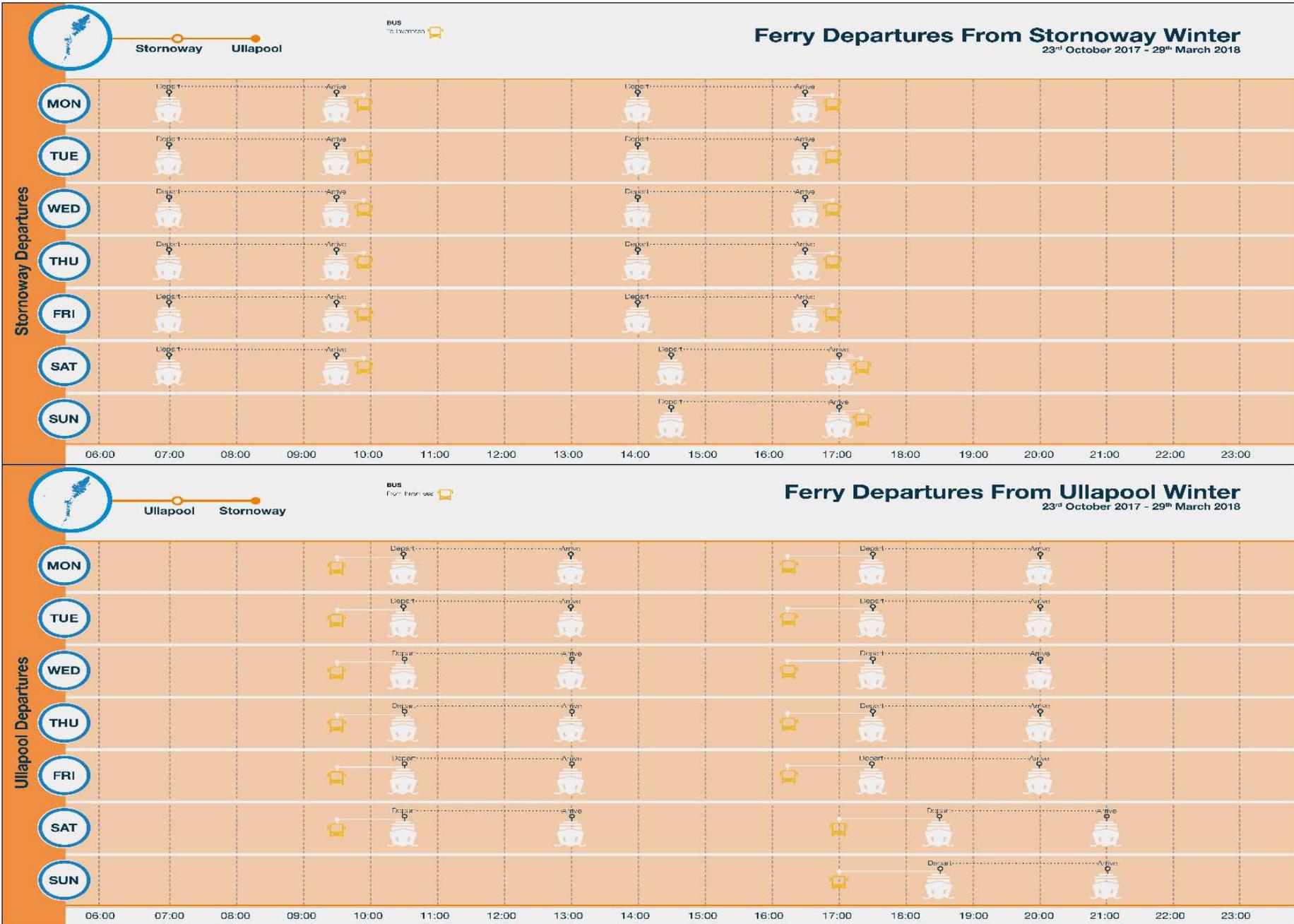
- Summer Timetable

- The Stornoway – Ullapool timetable is largely ‘clockface’, with consistent daily departure times across the week, although there are some minor variations on Saturdays and Sundays
- A second Sunday sailing has been added to the Summer 2018 timetable, now making it possible to make a day return trip to the Scottish mainland seven days per week
- The last departure from Stornoway is 14:00 Monday to Friday (15:30 on Saturday and 15:00 on Sunday), which is relatively early
- The bus services at Ullapool are well timed to connect with the ferries in both directions
- The 3rd sailing in summer (Wednesdays & Fridays) has not operated since MV *Loch Seaforth* commenced sole vessel operation of the route

- Winter Timetable

- There is very little variation between the winter and summer timetables on the Stornoway – Ullapool routes. This route, together with Ardmhor – Eriskay, is the most consistent in the Outer Hebrides in terms of timetable across the year.

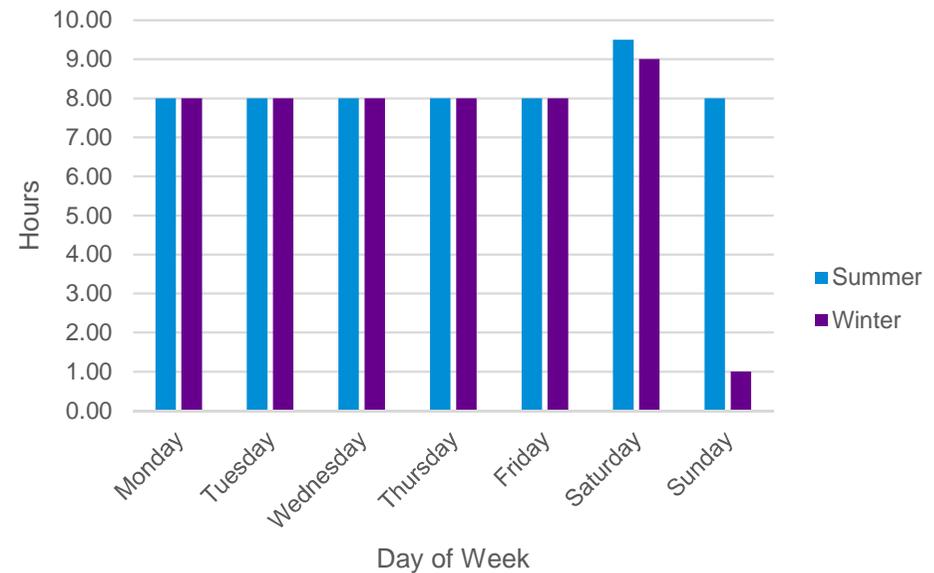




Time on Mainland / Time on Island

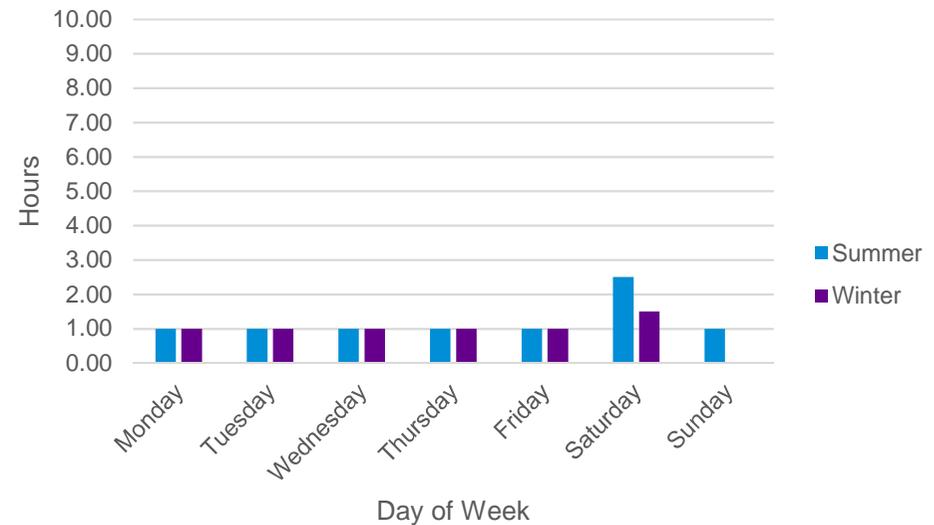
Time on Mainland

- 8 hours on mainland Mon–Fri summer & winter - allows a half day visit to Inverness
- Winter Sunday (based on 2017 timetable) is the only day of the week when a day return trip is not possible

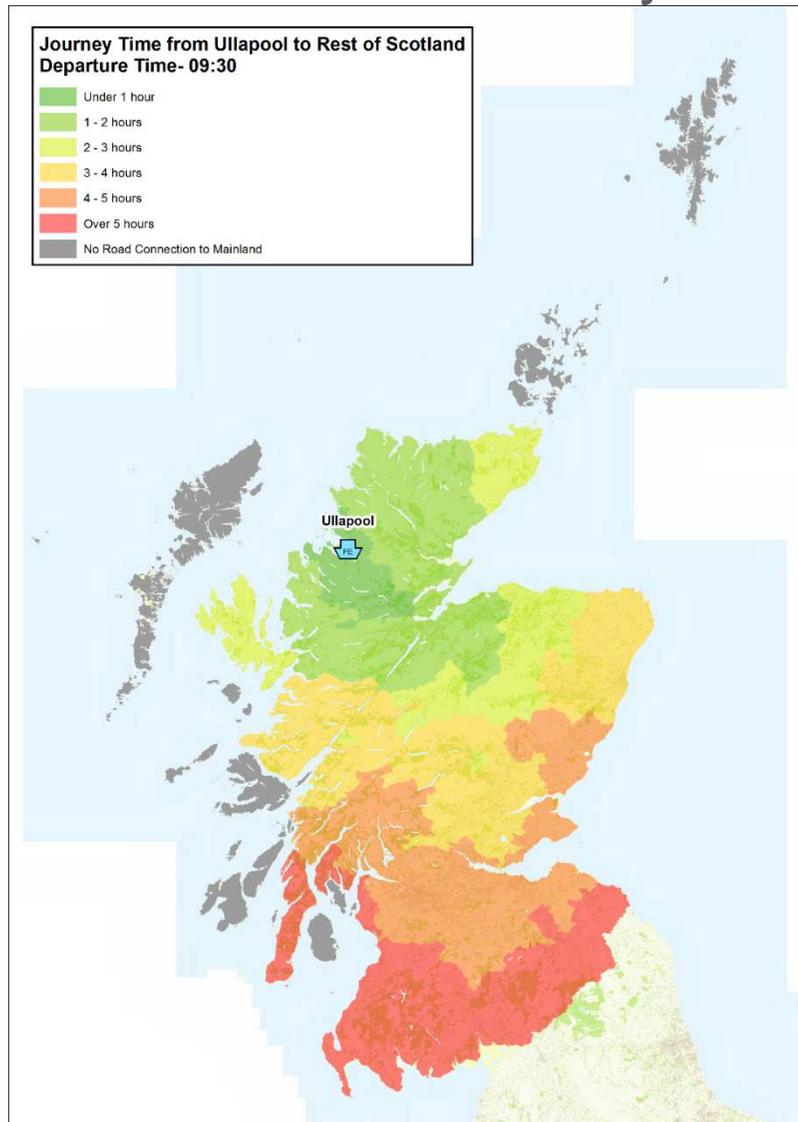


Time on Island

- It is not possible to make a meaningful day return trip to Lewis on any day of the week, summer or winter



Car-Based Accessibility to Mainland Scotland



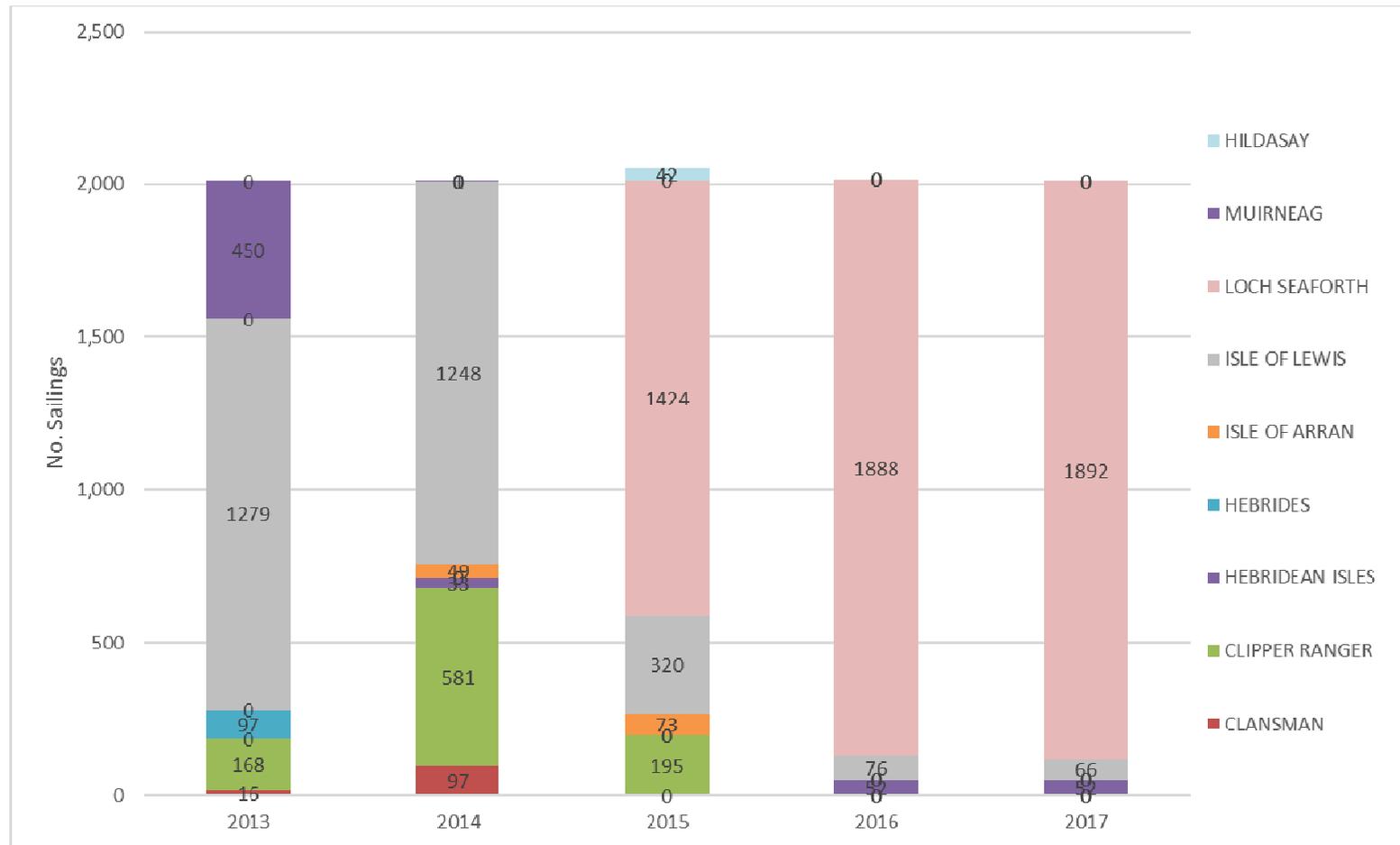
- The map shows typical travel times from Ullapool to all other areas of Scotland based on one hour time bands.
 - The map is based on observed traffic speeds collected from GPS devices
 - The graphic is based on the 09:30 ferry arrival into Ullapool
- Inverness is within a 1-2 hour drive, which means car based travellers would be in the city by no later than 11:30.
- Aberdeen, Edinburgh and Glasgow are in the 4-5 hour time bracket.
- Assuming a two hour drive from Inverness, this would mean that a car driver would be able to spend between 11:30-14:45 in Inverness, effectively a half day before returning on the 17:30 to Stornoway (16:45 check-in).
 - This allows for attending hospital appointments, business meetings etc.

Stornoway – Ullapool Punctuality & Reliability

Punctuality & Reliability

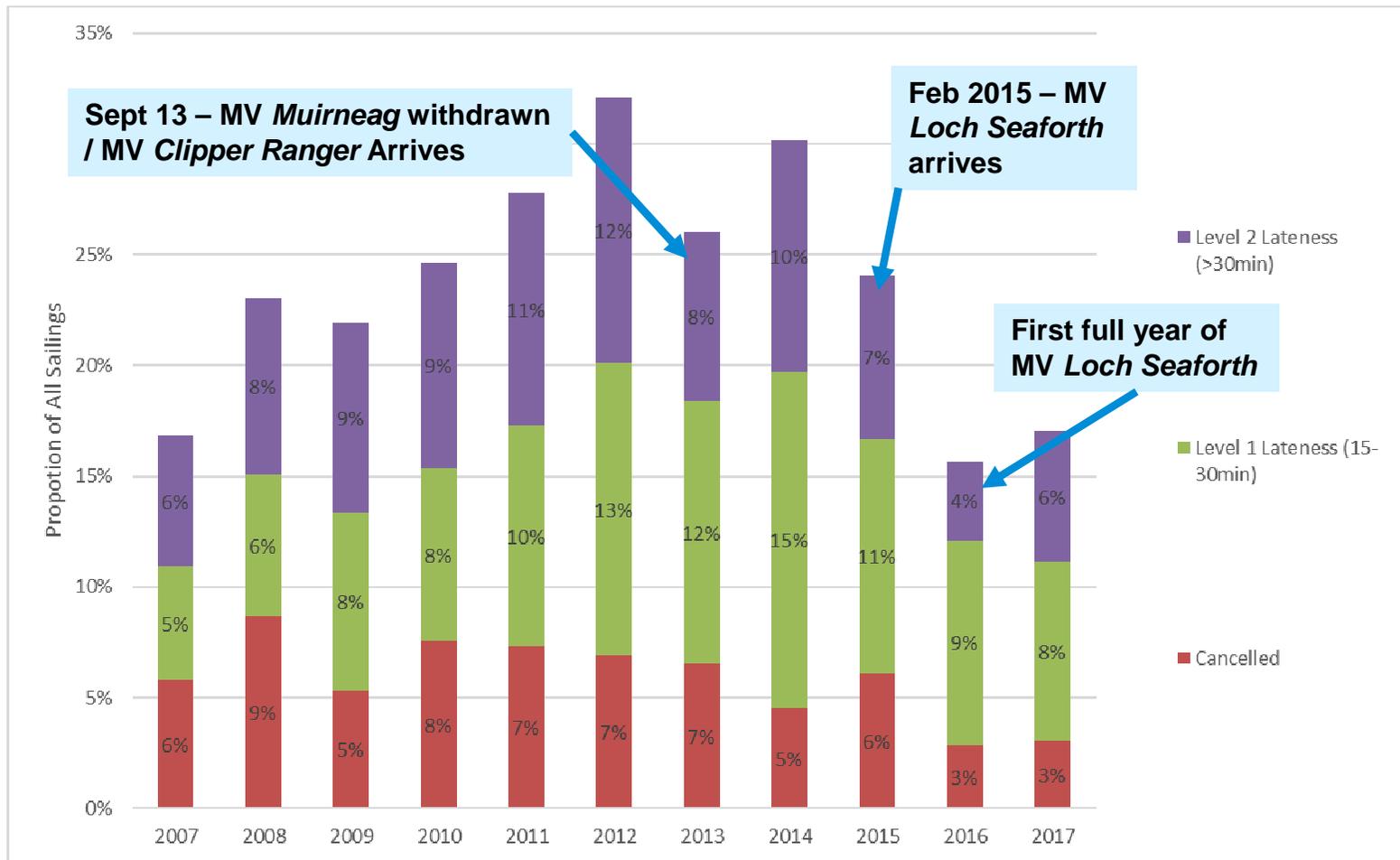
- Punctuality & Reliability are often cited as one of the most important characteristics of any public transport service, something which is particularly true of ferry services.
- CalMac has kindly provided performance data for **every sailing** undertaken on the Stornoway–Ullapool route between 1st January 2007 and 31st December 2017 – the following boards therefore allow us to tell **the punctuality & reliability story of the route**

How many sailings are made by each vessel each year?



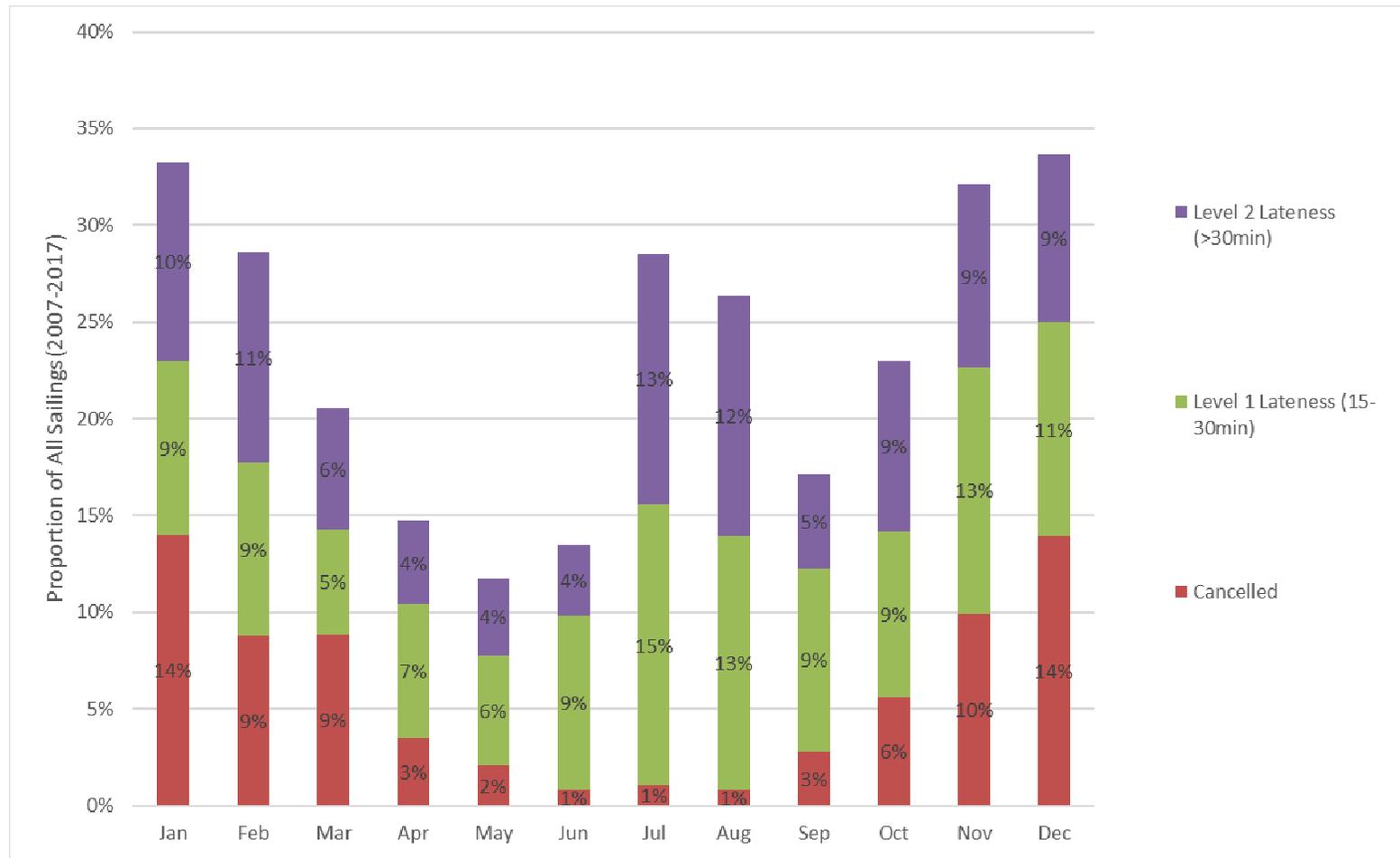
- 2013 and 2014 – MV *Isle of Lewis* main vessel with various other vessels providing the overnight freight service.
- Arrival of MV *Loch Seaforth* in early 2015 gradually phases other vessels out
- MV *Loch Seaforth* operated almost all sailings in 2016 & 2017

How has punctuality & reliability changed over time?



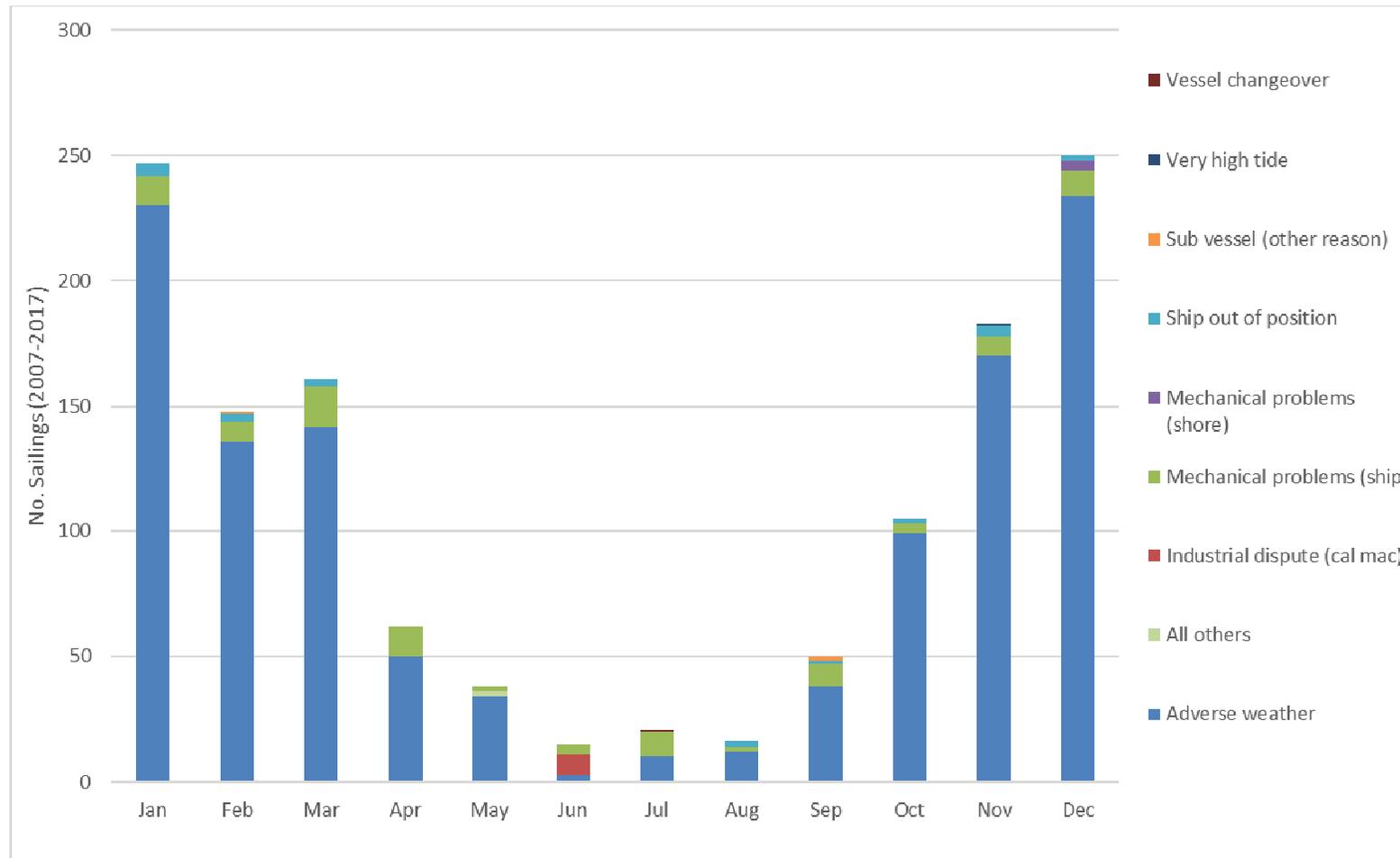
- Level of cancellations has reduced since MV *Muirneag* withdrawn
- MV *Loch Seaforth* has reduced cancelled sailings and both types of lateness

How does reliability & punctuality vary across the year?



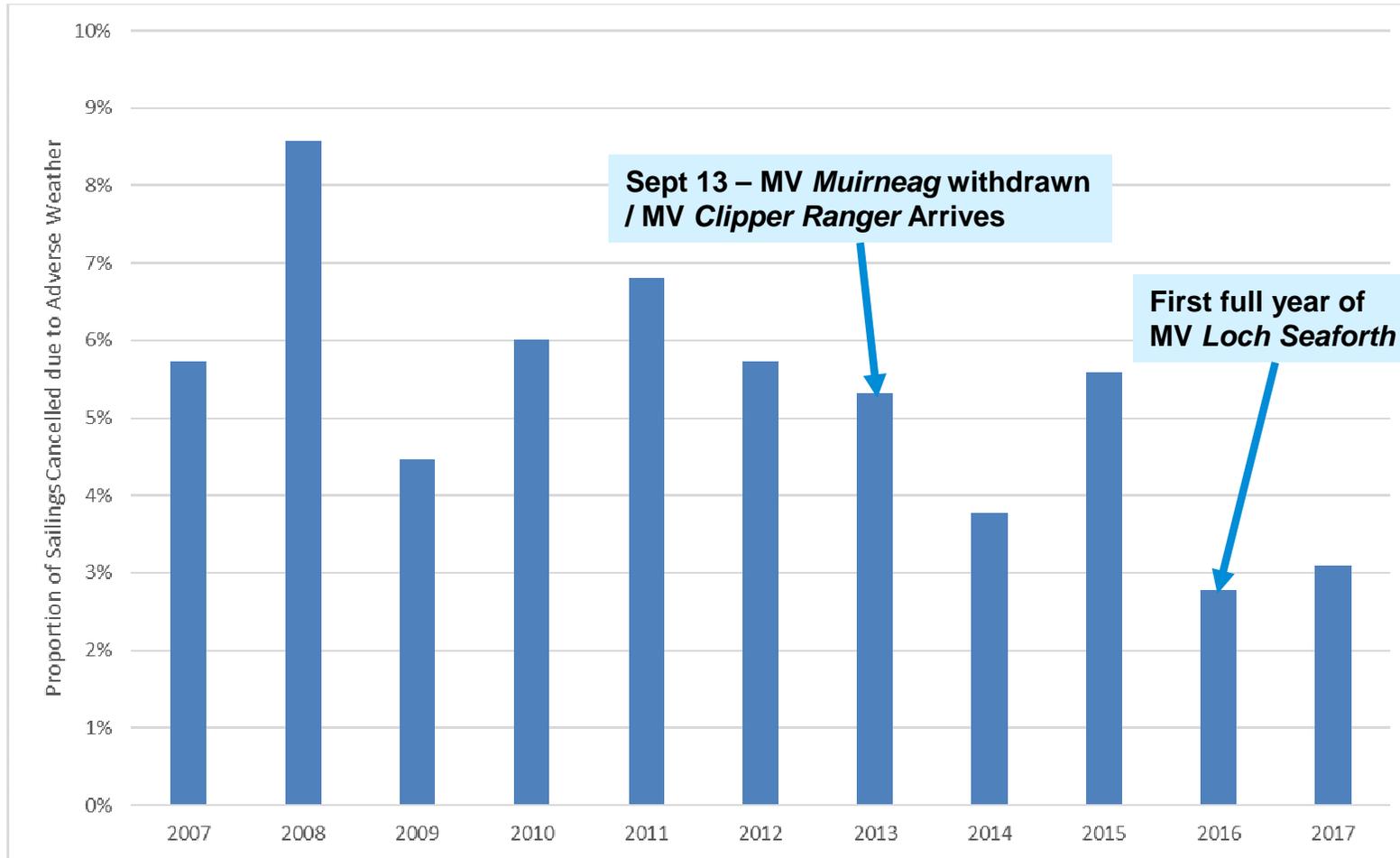
- As would be expected, majority of cancellations are in deep winter (November – February)
- Significant punctuality issues in July & August – understood to be predominantly due to high demand impacting on turnaround times

Why are sailings cancelled?



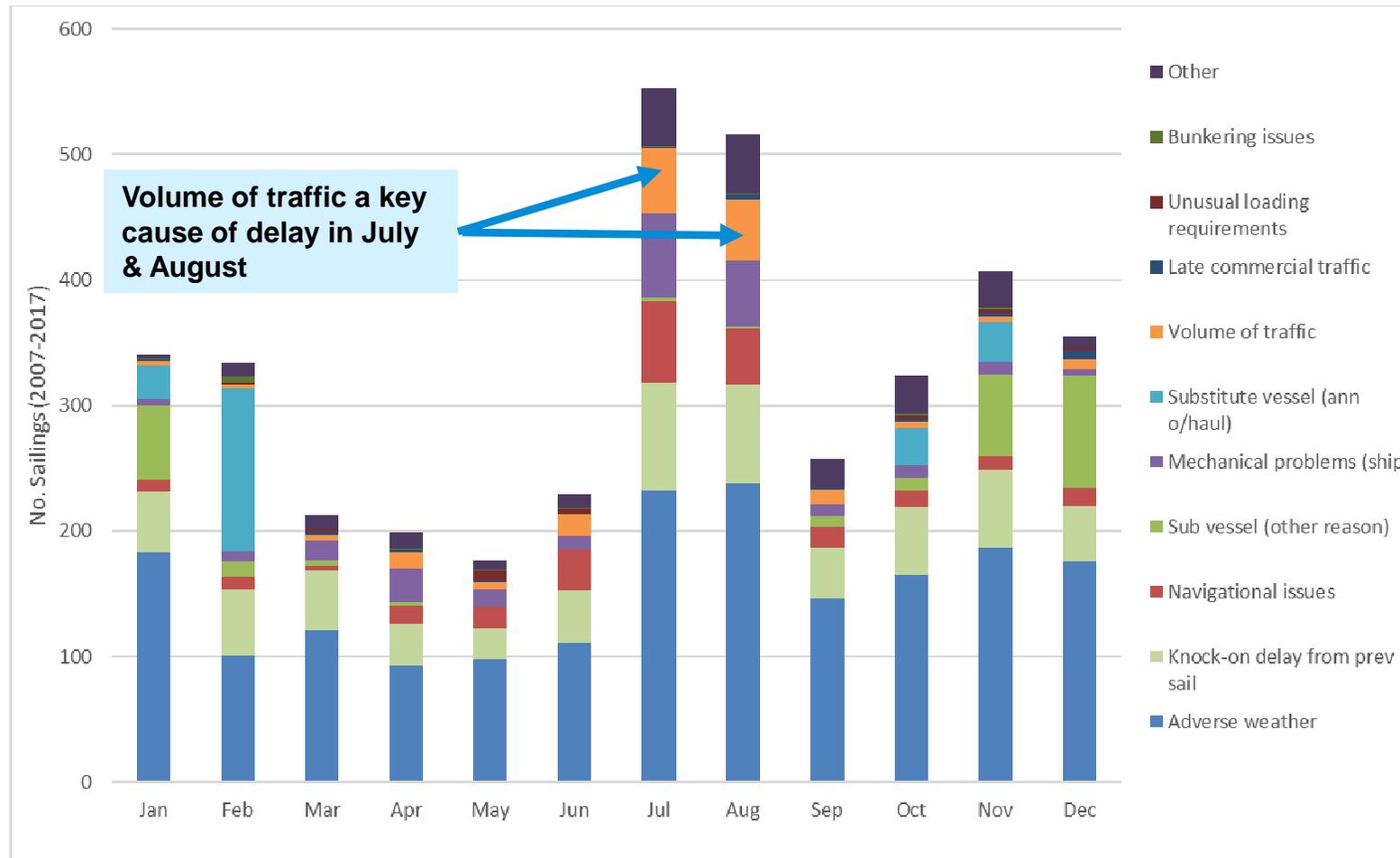
- Vast majority of cancellations on this route are weather related

Is the weather getting worse?



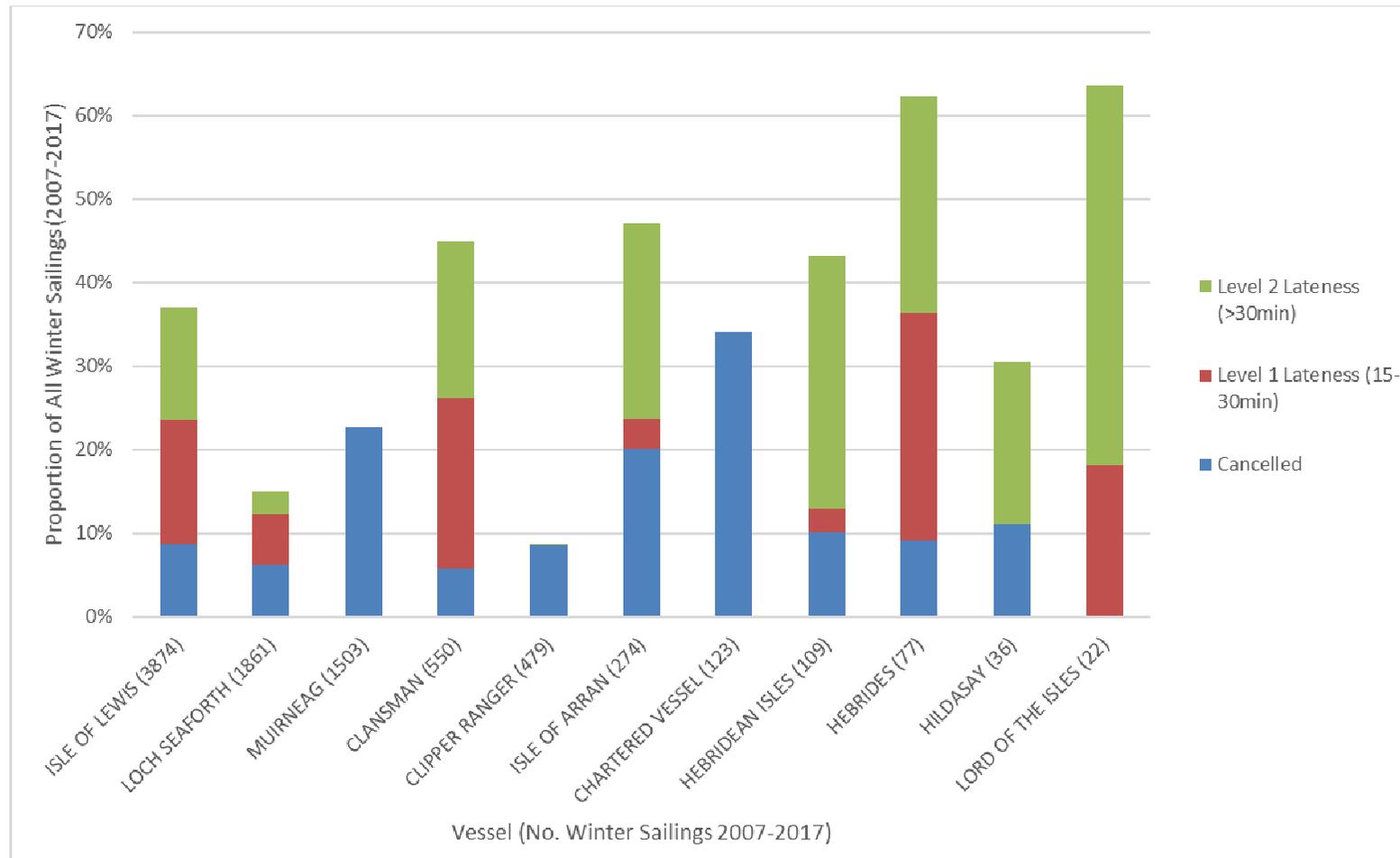
- Weather related reliability has generally improved since MV *Muirneag* was withdrawn
- MV *Loch Seaforth* has significantly improved weather-related reliability

Why are sailings delayed?



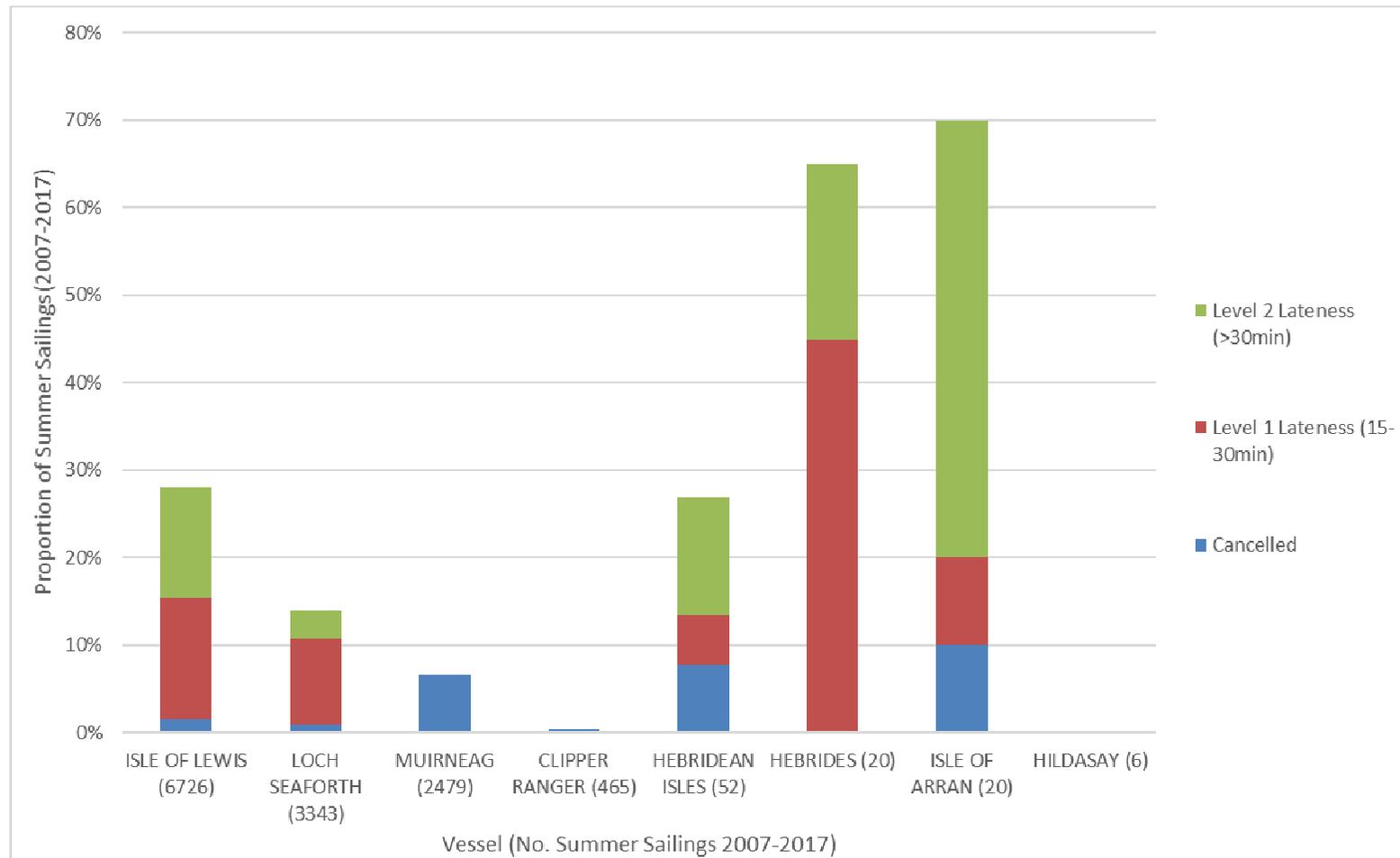
- Adverse weather is the principal cause of delay across almost all months
- Volume of traffic related delays & knock-on delays from previous sailings are largest in July & August – high demand may be delaying services

Does the vessel used affect winter reliability & punctuality?



- Note – ‘lateness’ was not recorded for the overnight freight sailings operated by MV Muirneag and MV Clipper Ranger (these services were outwith the performance regime)
- MV Loch Seaforth is proving to be more reliable and punctual than the MV Isle of Lewis in winter
- MV Clipper Ranger maintained a better record than MV Muirneag

Does the vessel used affect summer reliability & punctuality?



- MV *Isle of Lewis* was delayed much more often than MV *Loch Seaforth* in summer – this may be partly due to the smaller capacity vessel being more impacted by volume of traffic delays

Punctuality & Reliability

Summary

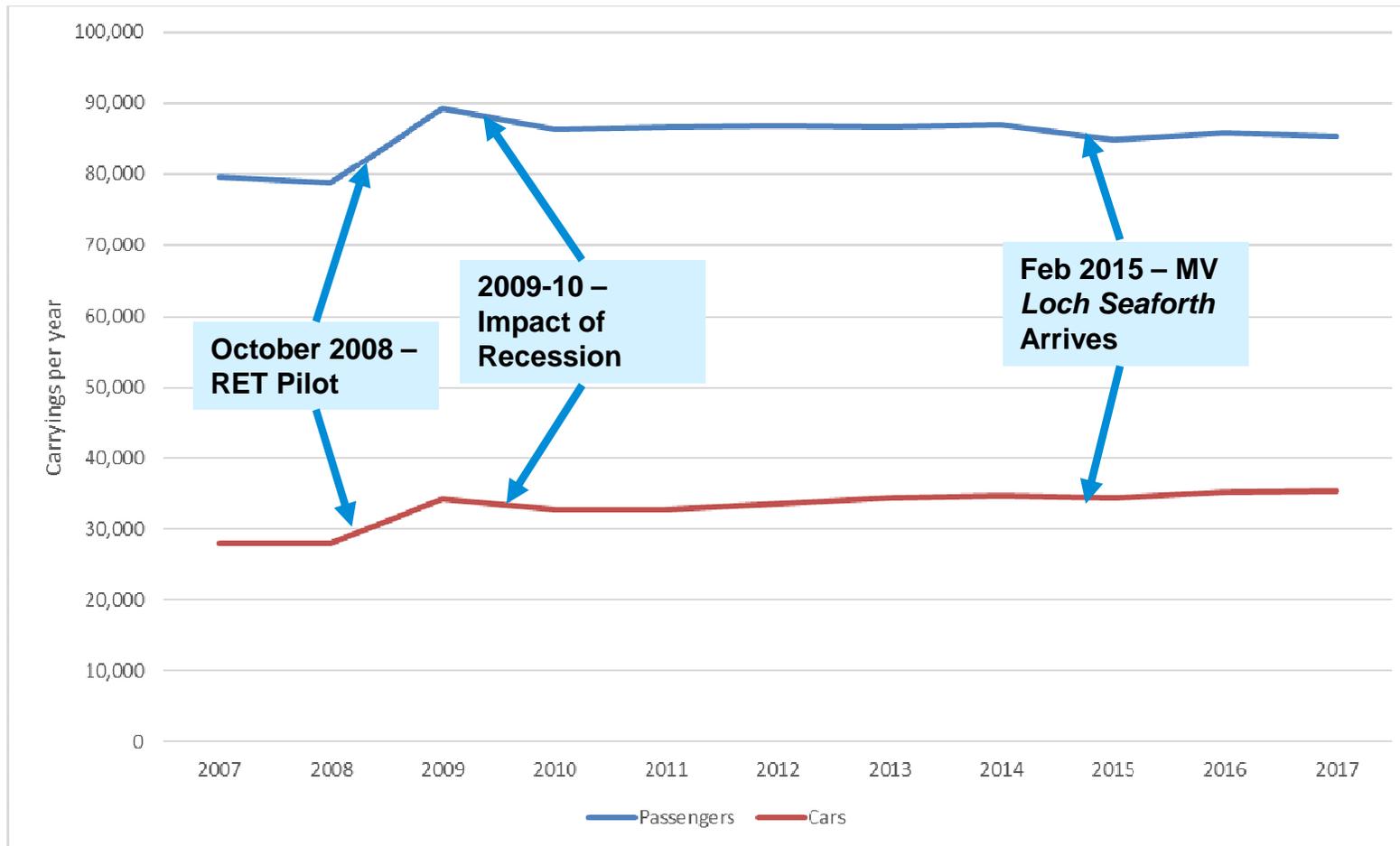
- MV *Loch Seaforth* has posted a strong reliability record – she has had fewer delays and cancellations than the MV *Isle of Lewis* on the daytime sailings and than all of the freighters on the overnight sailings
- ‘Volume of traffic’ related delays are significant in July & August – this points to a challenge in terms of maintaining turnaround times in the peak months

Stornoway – Ullapool Carryings & Available Capacity

Carryings & Available Capacity

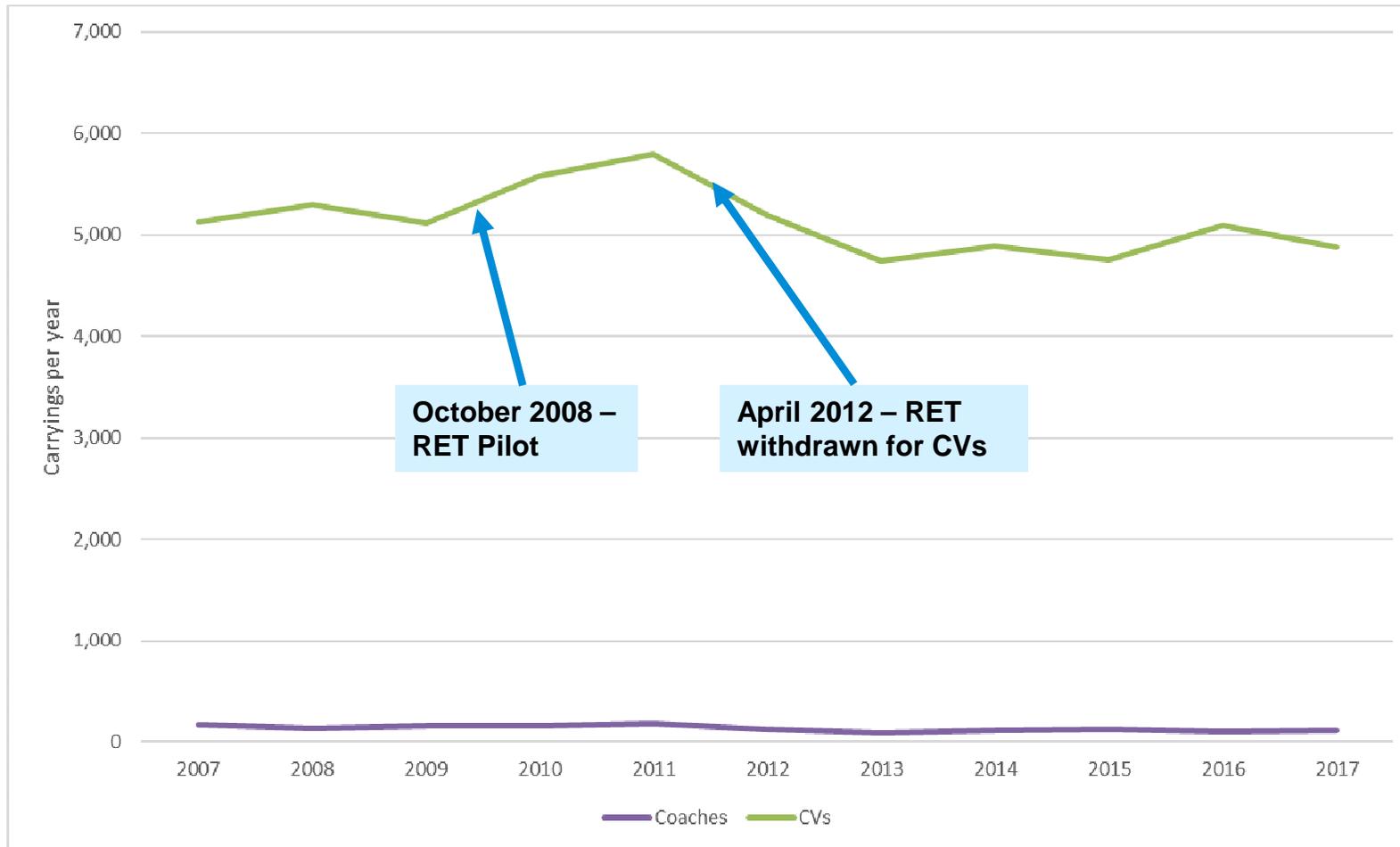
- The availability of capacity on the ferry on the days and at the times people wish to travel is of critical importance to the islands
 - This is particularly the case in terms of vehicle deck availability (the capacity to carry passengers is not generally an issue except on a handful of peak sailings)
- CalMac has kindly provided sailing-by-sailing carryings data for **every sailing** undertaken on the Stornoway–Ullapool route between 1st January 2007 and 31st December 2017 – the following boards therefore allow us to tell **the carryings & available capacity story of the route**

How have **passenger & vehicle** carryings changed over time?



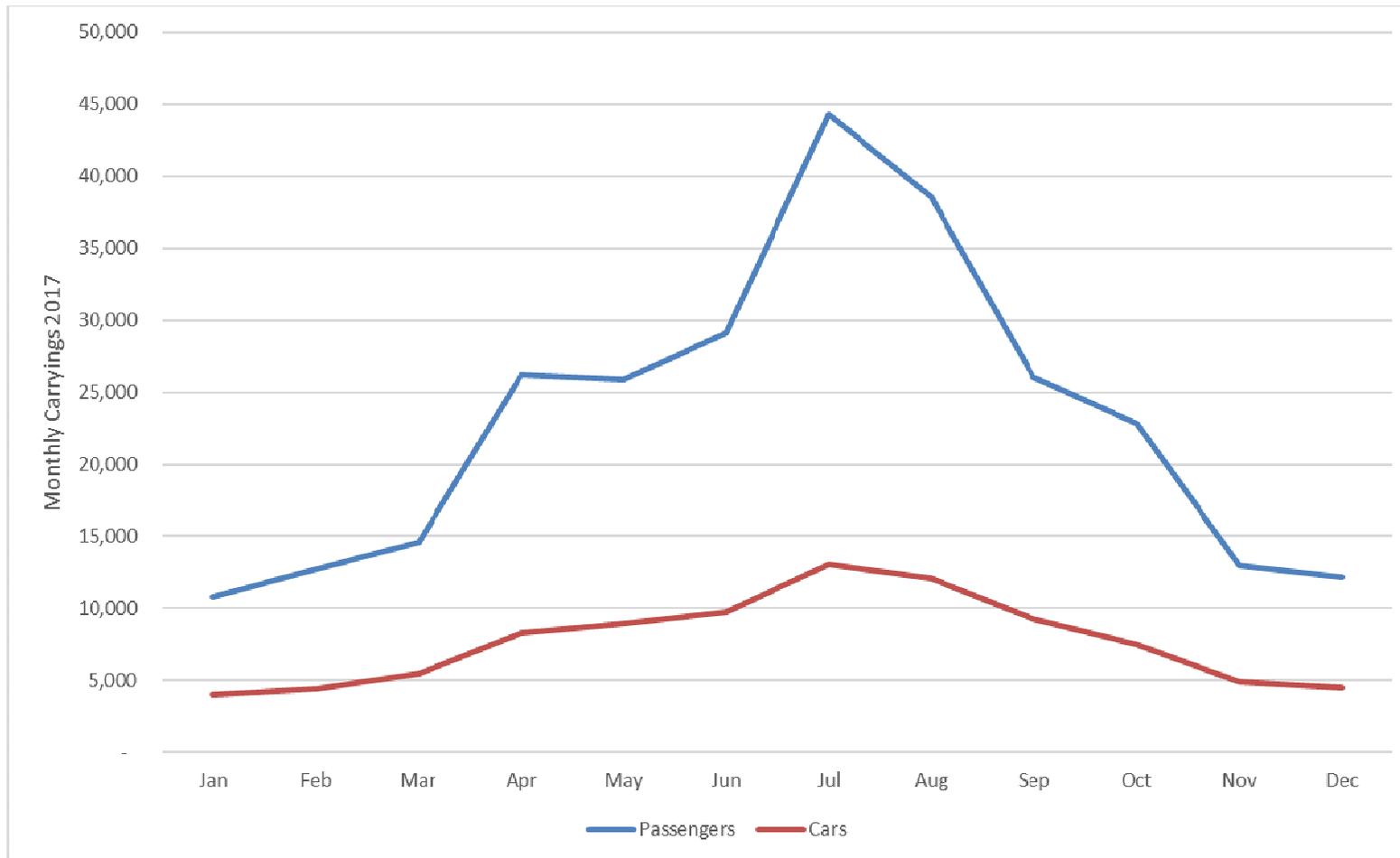
- Step change in carryings when RET was introduced. The percentage growth in cars (37%) exceeded that of passengers (20%) due to previous foot passengers now taking a car
- Subsequent carryings dampened by effect of recession

How have **coach & commercial vehicle** carryings changed over time?



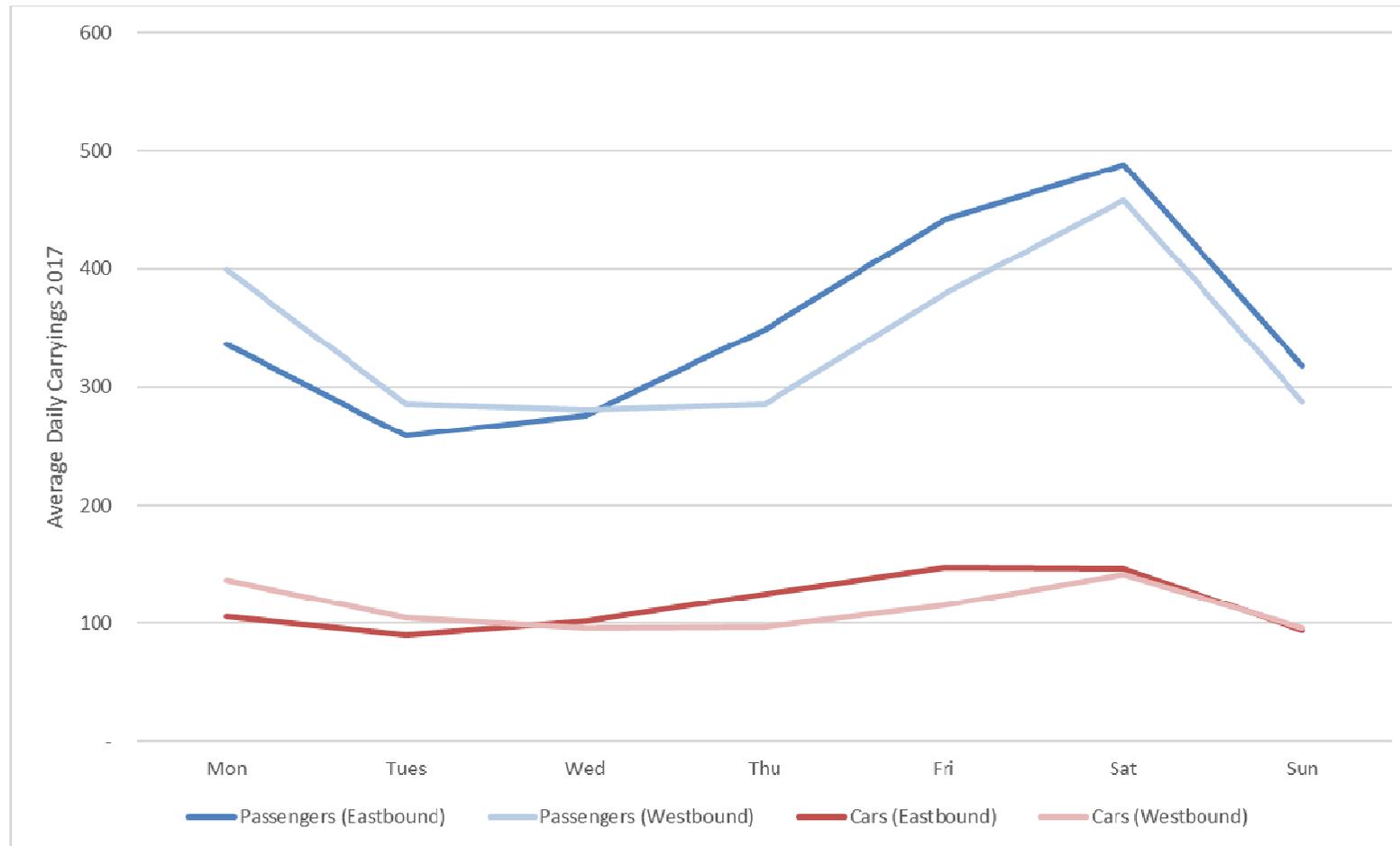
- CVs originally included in RET pilot – significant increase in CV carryings post 2008
- RET for CVs withdrawn in 2012 – RET-induced carryings increase reversed
- Redefinition of CV length from 5m to 6m further reduces CV numbers - a switch of traffic into vans.
- Coach carryings relatively flat over the ten year period

How do passenger & car carryings vary across the year?



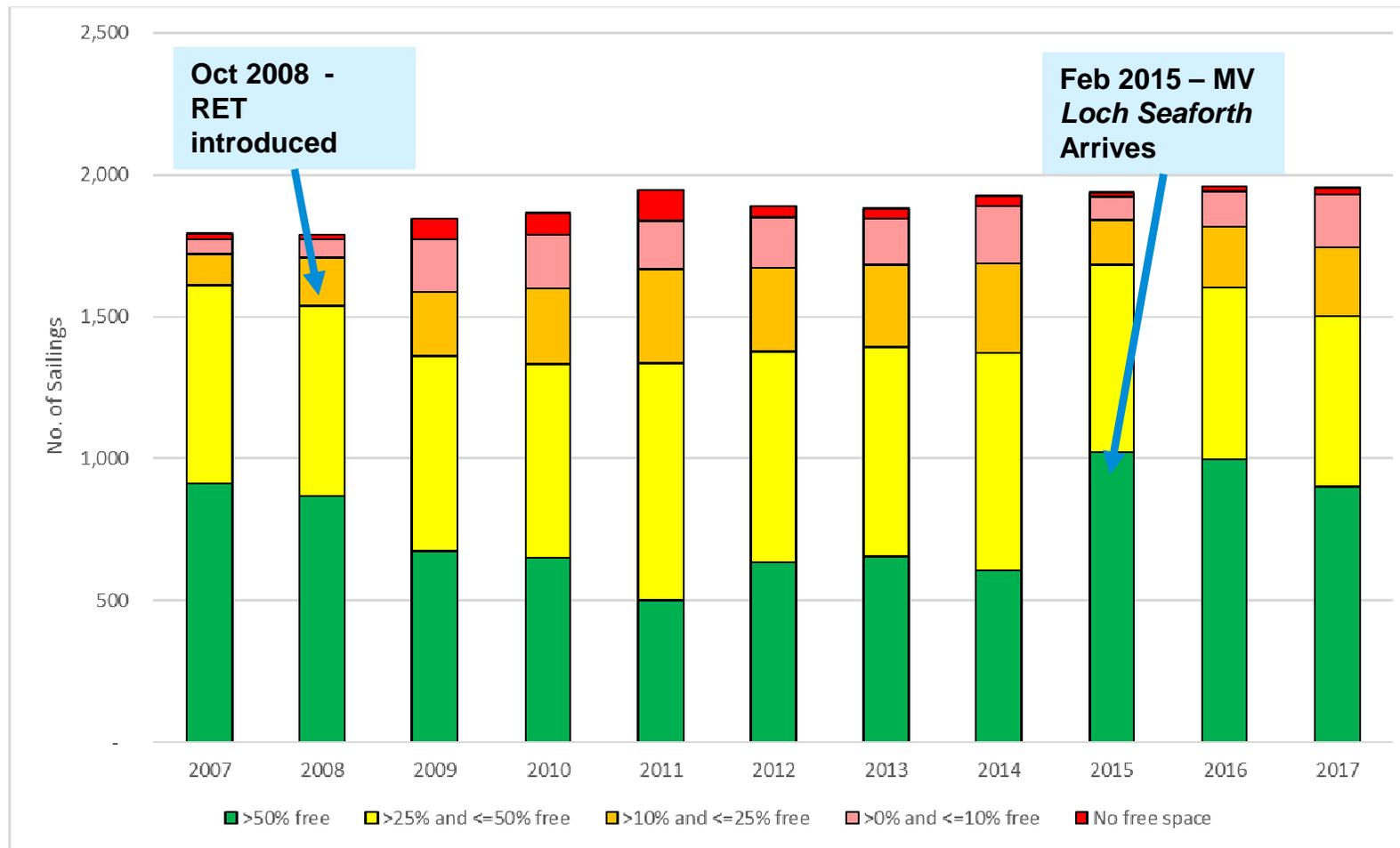
- June, July & August are the peak months on the route. There is also a significant Easter peak (April)
- Ferry demand displays a much bigger summer peak than general road traffic in the Highlands & Islands
- Whilst not shown on the graph, it should be noted that CV carryings are fairly flat across the year

How do passenger & car carryings vary by day of the week?



- Friday & Saturday are the peak days for passenger and vehicle movements in both directions
- The **westbound** peak is much more pronounced on a Saturday, which suggests a higher proportion of tourists on the route
- **Eastbound** passenger numbers are higher on a Friday and **westbound** on a Monday – this is caused by the long-weekend market amongst island residents

How often has the vehicle deck been full or nearly full?



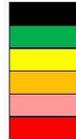
- MV *Loch Seaforth* initially reduced number of full or almost full sailings to near 2008 pre-RET levels.
- Increases in vehicle deck utilisation in 2016 and 2017 suggests that the route is getting busier
- There is a 10% discount for CVs using the overnight freight sailing

How much available capacity is there across the year? (Stornoway - Ullapool)

Ullapool to Stornoway Eastbound 2017

Average Daily Free Capacity

Cancelled
 >50% free
 >25% and <=50% free
 >10% and <=25% free
 >0% and <=10% free
 No free space



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- A number of days across July & August have very little spare capacity (less than 10% across the day)
- Fridays and Saturdays are peak days throughout the summer timetable period, with many having less than 10% spare capacity across the day. There were a number of Saturdays in July and August with no free space

How much available capacity is there across the year? (Ullapool - Stornoway)

Ullapool to Stornoway Westbound 2017

Average Daily Free Capacity

Cancelled
 >50% free
 >25% and <=50% free
 >10% and <=25% free
 >0% and <=10% free
 No free space



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- The majority of days in July have very little spare capacity (less than 10% across the day) although there are fewer 'red' days in this direction
- Saturdays are peak days throughout the summer timetable period, with many having less than 10% spare capacity across the day
- Vehicle deck capacity is generally less of an issue in the winter timetable period.

Carryings & Utilisation

Summary

- The introduction of RET in October 2008 led to a one-off step in passenger and vehicle demand in 2009. This demand was largely sustained thereafter
- The removal of RET for commercial vehicles in 2012, and the redefinition of the length at which a vehicle is classified as a CV from 5m to 6m increased car carryings and reduced CV carryings
- Fridays & Saturdays are the busiest days on the route, with July and August being by far the busiest months
- For island residents, Friday (Stornoway – Ullapool) and Monday (Ullapool – Stornoway) are key travel days
- The introduction of the MV *Loch Seaforth* in 2015 reduced pressure on the vehicle deck. However, vehicle deck utilisation has increased in 2016 and 2017, suggesting that capacity in peak season is starting to become a problem again