Cumbria County Council

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WINDERMERE FERRY

CABINET LED REVIEW

FINDINGS AND RECOMMENDATIONS

Report Issued: 21 DECEMBER 2017

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1.0   INTRODUCTION

1.1   At its meeting in June 2017 Cumbria County Council requested Cabinet to lead a review into the current ferry operations with the key aims being to identify a payment solution which is swift, secure, and available on board whilst also safeguarding the income which the Ferry generates.

1.2   Councillor Keith Little, portfolio holder with responsibility for Highways Transport and Fleet, and Councillor Janet Willis, portfolio holder with responsibility for Customer Services were appointed by Cabinet to lead the review supported by officers.

1.3   Councillors Little and Willis agreed the scope of the review as set out in section 2 below.

2.0   SCOPE

2.1   The review should investigate:

2.1.1   The background to the decision in 2015 to change the ticket payment system from on board cash collection to shore based machines. In particular addressing:

- Health & Safety concerns
- Customer concerns
- The decision to stop cash handling
- The alternative payment systems considered
- Why the system implemented was considered the best option
- How the change was publicised

2.1.2   The problems identified since the machines were introduced. In particular addressing:

- Equality concerns: requiring mobility impaired customers to leave their vehicles to buy a ticket or families whose children could be in cars alone
- Delays: ticket purchases, loading, crossings
- Staffing structure; employees, agency, supervision, training
- Customer concerns: ease of use of machines

2.1.3   Actions taken or proposed to be taken to resolve the problems identified. In particular addressing:

- Equality concerns: mobile contactless payments would overcome the need for customers to leave their vehicles
- Delays: more payment options, on shore support, on board payments
- Staffing structure: new staffing structure, customer service training, operating procedures
- Customer concerns: easier to use machines, reduced number of different ticket types

3.0   BACKGROUND

3.1   The decision in 2015 to change the ticket payment system followed a number of concerns, over a number of years, raised by customers that:

- some customers did not buy a ticket and
- what they perceived as inappropriate cash handling practices.

3.2   Cumbria County Council carries out regular planned audit assurance. Management Audit Unit reports on Windermere Ferry Income were produced in 2011, 2012, and 2013.   The reports note that the controls operating over Windermere Ferry income provided limited assurance (the lowest level) and recommendations were made each time for improvement. However the reports also acknowledged that any discrepancies in ticket/contract sales, income received, and income banked were not large. Despite this, concerns continued to be raised by customers during 2014 & 2015.

3.3   Health and Safety concerns were also identified in relation to risks associated with the cash collection system which could put individuals in a vulnerable position.

3.4   In September 2015 the Corporate Management Team (Chief Executive, Corporate Directors and statutory officers) discussed the concerns raised and decided that cash handling could no longer be supported. It was agreed that alternative ticket payment methods should be explored.

3.5   A project team was established to consider the options and the following month a briefing note setting out the proposal to change the ticket payment system from on board cash collection to shore based ticket machines was produced. Under the County Council's Constitution decisions on operational issues, such as this, are delegated to officers with the portfolio holder briefed for information.

3.6   The option to introduce ticket machines to avoid cash handling is one that had been considered by the ferry operations team for a number of years but not pursued because of the challenge of being able to sell sufficient tickets on board during the short crossing and concerns about potentially negative customer feedback.

3.7   The decision to rely on shore based ticket machines was seen as the solution to the on board logistical problem and also avoided the potential Health and Safety risk of all vehicle drivers being required to leave their vehicles and move around the deck whilst the ferry was in motion.

3.8   The proposed choice of ticket machines largely drew on an established relationship with a large supplier to local authorities across the UK which gave confidence that the machines were robust, well supported and competitively priced. In total five machines were proposed to be installed; two on either shore and one on board to provide an additional payment option for customers.

3.9   The briefing note included a delivery programme and provided for appropriate testing and consultation prior to the planned implementation in January 2016. It was proposed that all ferry stakeholders would be consulted including South Lakeland District Council, Windermere Lake Committee, South Lakeland Local Committee, local transport service providers and previous members of the former Windermere Ferry Advisory Committee.

3.10   During part of November 2015 (Storm Abigail) and then most of December (Storm Desmond) the team working on the implementation of the new payment system were diverted onto the emergency response and subsequent recovery phase of flood related work.

3.11   The period from January to June 2016 was one of unprecedented levels of activity across the highway service. Much of this activity was managed and led by the same officers that were also responsible for the implementation of the new ticketing system. As a result implementation was delayed until June 2016 when the new machines were installed.

3.12   From the evidence available, including interviews with the project team, it is clear that whilst some of the planned consultation took place it was not as full as had been intended. This resulted in the opportunity to learn from stakeholders being missed.

3.13   It is also evident that the intended testing of the new machines prior to switching from on board cash handling did not happen.

3.14   The risks associated with missing these programme steps were recognised. It was believed, however, that implementation in June 2016 gave adequate time before the busy summer holiday period to identify and correct any problems.

4.0   PROBLEMS IDENTIFIED WHEN THE MACHINES WERE INTRODUCED

4.1   Immediately the machines were installed and used by customers problems were identified. They fell into three main areas:

- The number of ticket types available combined with the choice of payment methods resulted in too many steps, or separate decision points, to complete a transaction in a timely manner.
- The instructions on the machines were not clear.
- Chip and pin transactions required a mobile broadband signal which on occasion "dropped out" during transactions causing them to fail and the transaction not being completed.

4.2   During peak times potentially 18 vehicle drivers and 50 plus foot passengers and cyclists could be queueing to buy tickets.

4.3   To avoid the previous concerns that some customers used the ferry without purchasing a ticket the operations team implemented a procedure to check all tickets before boarding.

4.4   As a result boarding times slowed significantly. Typical return ferry trips slowed from around 20 minutes to around 30 minutes. Fewer ferry crossings in turn caused longer queues at peak times.

4.5   A number of vehicle drivers either pre purchase tickets or, if blue badge holders, travel free and therefore do not need to buy a ticket at the machines. Some of these drivers, frustrated with the slow loading caused by the queues at the ticket machines, attempted to overtake waiting cars and drive straight onto the ferry. This resulted in a number of confrontations, with fellow passengers and ferry staff.

4.6 The use of the ticket machines required all drivers to leave their cars, sometimes some distance from the machines, to buy a ticket. Equality concerns were raised particularly with regard to drivers with mobility issues or parents traveling alone with children.

4.7 The narrowness of the lane leading to the ferry also raised some health and safety concerns relating to drivers being required to step out of their vehicle into the middle of the road to buy a ticket. The risk of an accident when cars were travelling in the other lane, either leaving the ferry or turning around to avoid queueing, was identified although the low travel speed on this section of road helped mitigate this risk.

4.8 The staff structure was also identified as a barrier to resolving some of the issues. The supervisor post had been removed as part of a budget saving measure therefore there was no one on board with overall responsibility. Whilst the service is a seven days a week offer the permanent staff are employed Monday to Friday. A number of staff were seconded on an ad hoc basis from highways operational duties. When permanent staff were not available the rota was supplemented by agency workers, sometimes with no previous experience.

4.9 Significant negative customer feedback, including social media, radio, press coverage and a petition of over 3,000 signatures, followed. A number of Freedom of Information requests were also received by the Council.

4.10 In general the feedback was critical of the ticket machines and sought to return to the previous cash handling process. Many also requested a return to the original 20 minute turnaround time.

5.0 ACTIONS TAKEN OR PROPOSED TO BE TAKEN

5.1 As soon as it was evident that the ticket machine sales process required too many steps prompt action was taken to have the software re-written. Regrettably this software revision took longer than originally promised. Action was also taken to make the instructions on the machines clearer.

5.2 Following these changes some customers still experienced difficulties purchasing tickets from the machines. As a temporary measure whilst the software was being revised and a better system developed, potentially using different machines, two additional shore based staff were put in place to help customers use the machines. New "graphical" step by step instruction signs were also put next to the machines to guide customers through the process.

5.3 Partly to address the equality concerns but also to speed up the ticket sales, and therefore boarding, handheld contactless payment machines were introduced which enabled the ferry operatives to take payments at the driver's window. This payment method was intended to be available either whilst waiting for the ferry, at the point of boarding or on board.

5.4 To some extent these actions have addressed a number of customers concerns. An independent customer survey was commissioned from Bauer Media Group during the October 2017 half term. It identified that the majority of ferry customers are visitors to the Lakes, over 77% had no difficulty purchasing a ticket and over 92% had a positive experience. Locally based customers tended to be more critical than visitors of the process and experience.

5.5 The options for a better ticket sales system continues to be investigated although mobile cash handling with appropriate audit controls remains the challenge.

5.6 The ambition in the Council request to Cabinet is an on board payment system. Whilst on board payments are already available the option for ferry users to either pay on shore or on board continues to slow the loading process and enables the potential for "queue jumping". It is therefore proposed to discontinue the on shore machines.

5.7 The proposal for foot passengers is an on board machine but with just one ticket choice and therefore a reduced number of steps in the transaction compared to the current arrangement. There are some concerns about the ability of one machine to handle the volume of passengers at peak times but this will be monitored. It is further proposed that all vehicles and cyclists pay on board. The current signage will be changed to make the new arrangements clear to customers. This should speed up the loading process and therefore ferry turnaround times.

5.8 It is anticipated that most vehicle customers will either pre-purchase their ticket or use either card or smart phones to pay the ferry operative from their car. To provide for cash payments from what is anticipated to be one or two vehicles per crossing a deck mounted machine will be available. Customers who wish to pay by cash will need to leave their vehicle and operating procedures will be developed to manage movement around the deck during the crossing safely. It is proposed that cyclists will also either pay the ferry operative if using a card or smart phone or use the deck mounted machine for cash transactions.

5.9 As almost 90% of the income generated by the ferry is from vehicles it is proposed that the ferry operatives focus their time during the crossing, 3 to 5 minutes, on ensuring all vehicle drivers have valid tickets.

5.10 The ticket machines proposed to be used by the ferry operatives are currently being tested but will incorporate software that enables a simple upload of transaction information each day to ensure appropriate management information is captured. They also need to be waterproof. To further support management information and safe operating procedures people and vehicle counters will be used on board and consideration is being given to the use of CCTV.

5.11 To encourage the pre-purchase of tickets a website is being developed as well as a smart phone app so that tickets can be purchased at any time, potentially whilst customers are waiting for the ferry.

5.12 A new staff structure has also been established. This has taken into account the seven days a week operation and will see a supervisor appointed who will ensure operating procedures are followed. Following appointments the permanent team will be trained in the new operating procedures and customer service expectations and standards.

6.0   NEXT STEPS

6.1 In view of the lessons learned from the implementation of the ticket machines in 2016 it is proposed to first engage with all ferry stakeholders prior to implementing any further changes. Engagement should include South Lakeland Local Committee, the Lake District National Park Authority, South Lakeland District Council, Windermere Lake Administration Committee, Town & Parish Councils bordering the lake, local transport service providers and members of the former Windermere Ferry Advisory Committee. It is also proposed that

as part of that engagement consideration should be given to reinstating the former Windermere Ferry Advisory Committee, its membership and terms of reference.

6.2   Prior to the introduction of any new equipment or technology it should be thoroughly tested by operations staff and customers to ensure it is fit for purpose.

6.3   It is proposed that the new arrangements should be in place prior to the start of the busy holiday periods in 2018.

For any queries about this report please contact Mike Smith, Assistant Director – Capital Programme and Property, on 07717 003727 or at mike.smith@cumbria.gov.uk

APPENDIX 1 - ACTION PLAN

ACTION	OWNER	DATE	IMPACT
Report Published on Ferry website	Mike Smith	21 December	Public awareness of background, issues and proposed solutions
2018			
Stakeholder engagement	Claire Maclaine	Start mid January	Raise awareness of issues and proposed solutions. Learn from others experience. Customer feedback.
Refinement of ticketing options based on stakeholder engagement			
New machines require 8-10 weeks lead time from order to installation			
In-house testing of software and machines			
Trial new proposals with customers prior to going live			
New staff structure put in place			
Operating procedures developed			
Staff training provided			
New ticket systems go live for public use			
Review performance of ferry and ticketing systems at 1 month, 3 months and 6 months			
Refinements to systems, procedures, staff training, and pubic information			
Repeat customer satisfaction survey 6 months after systems goes live			