

**CAR AND PASSENGER FERRY SERVICE  
BETWEEN JERSEY AND THE UNITED KINGDOM**

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**Lodged au Greffe on 16th June 1998  
by the Jersey Transport Authority**

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**STATES OF JERSEY**

**STATES GREFFE**

175

1998

P.138

Price code :

## PROPOSITION

**THE STATES are asked to decide whether they are of opinion -**

- (a) to approve, in principle, that permission be granted to Condor Ferries Limited, for a period of three years commencing 1st January 1999, to enable that company to operate passenger and car ferry shipping services between Jersey and the United Kingdom;
- (b) to request the Harbours and Airport Committee to grant the necessary permit under the Harbours (Administration) (Jersey) Law 1961, as amended, and to include as a condition of that permit a Service Level Agreement in terms approved by the Jersey Transport Authority.

### JERSEY TRANSPORT AUTHORITY

- NOTES:
- 1. The Tourism Committee comments are to follow.
  - 2. The Agriculture and Fisheries Committee comments are to follow.
  - 3. The Harbours and Airport Committee comments are to follow.

## **Report**

### **Passenger and Car Ferry Shipping Services to be operated between Jersey and the United Kingdom**

#### **Why a tender process and how was the process carried out?**

1. The Jersey Transport Authority in conjunction with the Guernsey Transport Board decided last year to invite shipping companies to tender for the Channel Islands/United Kingdom passenger/car ferry services. This decision was in response to the poor performance of Condor Ferries in operating the services in the summer of 1997. That poor performance had arisen because of technical problems which produced frequent breakdowns and delays. These difficulties were compounded by the failure of the Company to provide the standard of customer care that is expected when dealing with passengers generally, and in particular those affected by the disruption of service caused by technical problems.
2. The Jersey Transport Authority was also concerned that, until a meeting with the representatives of the companies on 10th October 1997, Condor Ferries had not informed the Authority of the full extent of the technical problems. Throughout the summer the Authority had been assured by the Company that the technical problems had been dealt with, only for breakdowns and disruption of service to occur immediately thereafter. The Jersey Transport Authority was told by the Company in October it had taken the following steps to rectify major engineering problems -
  - new inter-coolers had been designed to replace the existing coolers which could not take the resultant stresses and strains due to an inherent design fault;
  - the design of the cylinder heads was being examined as there was a design flaw which had meant that about thirty-five had had to be replaced during the 1997 season;

- cam shafts were being fitted to replace two that had failed;
  - welding works had taken place to reduce vibration in the engine compartment.
3. Both the Jersey Transport Authority and the Tourism Committee received many letters from passengers, visitors and Island residents, complaining of the lack of customer care, and the inability of the Company to handle the situations that arose because of the technical problems. Early in 1997 the Jersey Transport Authority had enquired of the Company whether it believed it had sufficient management and manpower resources to cope with any disruption of service. At that time the Company assured the Jersey Transport Authority that staff resources were adequate and there was no need for a local manager. In October the Company informed the Authority that it was to implement measures to improve its services. Training was being increased and a review of the management structure was being undertaken. The provision of a Jersey manager was also being examined. Port staff were being trained and steps had been taken to improve communications.
  4. During 1997 the Tourism Committee expressed grave concern at the service being provided and was fearful that it would have an effect on tourist traffic in 1998. The Jersey Consumer Council also received many complaints about the service, including complaints from guest house proprietors in Poole regarding the late hour that Condor passengers arrived at Poole Harbour, and from passengers on short breaks to Jersey who, because of delays, had spent very little time in the Island.
  5. In the light of Condor's performance during 1997, and the publicity given to this, the Jersey Transport Authority and Guernsey Transport Board received expressions of interest in the route from other shipping companies. The two Authorities decided to invite tenders for the route. In February of this year the Jersey Transport Authority and Guernsey Transport Board placed an advertisement in Lloyds List seeking tenders from passenger and car ferry operators interested in providing a year-round service between the Channel Islands and the United

Kingdom to commence on 1st January 1999. The successful tenderer would be required to provide a service which would meet the needs of holiday makers and Channel Island residents, and to meet certain specifications laid down by the Island Authorities in respect of frequency of sailings, fares, standard of vessels etc. The full Service Level Specification is attached at appendix A.

6. Nine companies expressed an interest: only three submitted tenders - Condor Ferries, Hoverspeed and P&O European Ferries.

### **What the tenderers have offered**

7. Details of the tenders submitted by the three companies were circulated to States members in April. In addition, all the companies have promoted their offers through advertisements in the Jersey Evening Post. Further summary documents provided by the companies when they presented their proposals to the Jersey Transport Authority and Guernsey Transport Board at a joint meeting on 1st June will also be circulated to States members in advance of the debate on the Jersey Transport Authority's recommendation as to which of the ferry companies should be granted the necessary permit to use the ramp at St. Helier Harbour. A summary of the companies' proposals is set out as follows -
8. Condor
  - Condor is proposing to use two fast ferries - Condor Express and Condor Vitesse with a backup passenger-only carrying vessel Condor 9.
  - If granted the route the Company would invest in a new conventional vessel carrying cars and freight to be operated from January 2000 (called a Ro-Pax vessel).
  - There would be no direct sailings to Jersey.

- The services would be split between three ports: Weymouth for early morning and late evening fast ferries, Poole for other fast ferries and Portsmouth for the conventional vessel.
- In the winter there would be one sailing five days a week and in the summer three sailings daily.
- From January 2000 the Ro-Pax would operate daily.
- The fares for 1999 would be at the 1998 level plus 3 per cent. Day excursion fares would be available to Channel Island residents as well as United Kingdom residents.
- The capacity of Condor Express and Condor Vitesse would be 750 passengers and 185 cars. Condor 9 would carry 450 passengers, and the conventional vessel would have capacity for 500 passengers and 41 four-berth cabins.
- The maximum daily capacity would be 2,250 passengers and 555 cars in 1999, with an additional 500 passengers with the conventional vessel in the year 2000.
- The earliest start would be 07.00 from Weymouth and 08.15 from Jersey. Latest arrival would be 23.55 in Weymouth and 23.10 in Jersey.

## 9. Hoverspeed

- Hoverspeed is proposing a year round fast ferry from Weymouth, an extra daily conventional ship operating from June to September, and possibly a second fast ferry operating between June and September if the demand justifies it.
- Operating out of Weymouth the Company would invest in Terminal improvements at that port.

- Under option 1, which involves the year-round fast ferry service, with seasonal conventional ferry service, all fast ferry services would be via St. Peter Port and the conventional ferry service would be direct to St. Helier and back via St. Peter Port.
- With option 2, which involves the introduction of an additional seasonal fast ferry service, one of the fast ferries operating between June and September would be direct to Jersey and back via Guernsey.
- Fares would be largely unchanged from their current level. There would be a discount on the conventional ship and parity for United Kingdom and Channel Island traffic, but with a discount for Island residents on brochure and promotional fares.
- The fast ferry Super Seacat would have a capacity of 770 passengers and 175 vehicles and the conventional ferry would have capacity of 1,000 passengers and 160 vehicles.
- Under option 1 (excluding the extra seasonal fast ferry) the maximum capacity would be 2,540 passengers and 510 vehicles per day.
- The earliest start would be from Weymouth at 07.00 and from St. Helier at 11.30.
- Latest arrival would be at 23.59 in Weymouth and 19.50 in St. Helier.
- There would be a fast ferry daily year round and, in the summer, there would be two fast ferry services daily plus one conventional ferry. In the winter months the conventional ferry would provide permanent back-up.

## 10. P&amp;O European Ferries

- P&O is proposing two seasonal fast craft - one covering the period March to November and the other covering the period April to September. In addition there would be one conventional vessel year-round.
- The fast craft have a capacity of 900 passengers and 200 vehicles and the conventional vessel a capacity of 1,000 passengers and 330 cars (or freight vehicle equivalent). The conventional vessel would have 100 four berth cabins.
- All services are via Guernsey.
- The proposal includes a link to St. Malo.
- The proposals are based on using Portsmouth which appears to have a disadvantage in terms of the travel time at sea. An alternative proposal is put forward involving using Weymouth and excluding St. Malo but this is not considered by the Company to be its preferred option.
- The brochure fares proposed would be the same as the 1998 level. There would be a discount for travel on the conventional vessel, and a range of incentives for off-peak travel.
- Fares available to United Kingdom originating passengers would also be available to Channel Islands-originating passengers.
- There would be a daily service in winter and summer. In the summer months the maximum capacity would be 2800 passengers and 730 vehicles per day.
- In the summer months the earliest start would be 07.00 from Portsmouth and 08.00 from Jersey.



- Latest arrival would be Portsmouth at 21.20 and Jersey at 19.35.
- There would be one service daily using the conventional vessel for January, February and December, two services daily using the conventional vessel and the fast craft in March, October and November and three services daily between April and September involving the conventional vessel and two fast craft.

## **Evaluation of tenders against the Service Level Specification**

### Services

11. Reliable frequent service - all tenderers offer this. However there are some question marks remaining concerning the reliability of the engines of the Condor vessels: Hoverspeed's single hull vessel is likely to be most affected by sea conditions, and the P&O fast ferry is virtually untested in Channel waters.
12. Arrangements for backup vessel - P&O and Hoverspeed are major companies in the provision of ferry services which should enable them to obtain backup vessels if needed. However, generally speaking, the proposals envisage the backup being provided by the conventional ferry. In this connection P&O and Hoverspeed have a conventional ship with much larger passenger capacity than Condor/Commodore (but Condor offer Condor 9 as a backup passenger-only vessel).
13. What weather and sea conditions would prevent a sailing - Hoverspeed appear to be most vulnerable to weather and sea-state conditions in respect of their fast craft.
14. Length of time the sea journey will take - the P&O proposal is least satisfactory in this respect.
15. Direct sailings to Jersey - Hoverspeed offers the possibility of a direct fast craft sailing to Jersey. Where a service is to serve both Islands, Condor has argued that the only practical arrangement is for the vessel to call at Guernsey first. Direct

sailings to Jersey might be obtained if different operators serve Jersey and Guernsey. The viability of such an arrangement, however, is considered unlikely.

### Selection of Ports

16. Portsmouth is to be used by P&O, and this port has the best accessibility by public roads/public transport; best harbour facilities; and best passenger facilities.
17. Weymouth is to be used by Hoverspeed, and this port is the least attractive of the three suitable ports in terms of accessibility by public roads/public transport, and also in terms of existing passenger facilities, although Hoverspeed have indicated that it would support Weymouth by investing in improved facilities.
18. Condor proposes to operate from three ports - Weymouth, Portsmouth and Poole.

### Selection of Vessels

19. All tenderers propose to use vessels that will be of a high standard of quality, safety, complying with national and international standards.
20. There is little difference in overall capacity in the peak months between the companies, but Condor will provide more fast craft capacity.
21. P&O will not operate a fast craft in the winter months.
22. Hoverspeed proposes to provide a conventional vessel only between June and September.
23. Condor Ferries' tender proposes a conventional vessel in service in 2000.
24. Of particular concern to the Jersey Transport Authority has been the reliability of the vessels to be used, particularly the fast

ferries. The following views have been expressed to the Jersey Transport Authority by the Harbourmaster:

- The wave height clearance agreed for the fast ferries is as follows -
 

Condor Express/Vitesse	Maximum significant wave height for the craft - 3.5m
Hoverspeed Super Seacat	Maximum significant wave height for the craft - 3.0m (although the company is confident that it will obtain a 3.5m approval)
P&O Austal Catamaran	Maximum significant wave height for the craft - 3.5m.
  
- The 86m Incat Fast Ferries used by Condor are well-known to the Islands. Both Condor Express and Condor Vitesse have now been fully modified to have the engine rooms and engines upgraded. Condor is confident that the reliability of these vessels will be greatly improved as a result. Early indications from the 1998 seasons operating patterns give some confidence that there has been an improvement in reliability as a result of these modifications. The proposed Condor scheduling using a cross-over routing pattern between Weymouth and Poole with two identical ferries will reduce the daily transit distance. This will allow the vessels to be operated at lower power settings than in 1997. These vessels are well proven on the route and are the fastest of the high speed craft, offering the quickest cross channel time.
  
- The Hoverspeed Super Seacat has the more restricted wave height performance. The mono-hull Super Seacats are not considered to perform as well from a passenger comfort stand point in a beam sea, the type of sea experienced between Jersey and the United Kingdom.
  
- The P&O European Ferries Austal High Speed Catamaran does not have a track record yet in Channel waters. While

it is likely that the sea-keeping qualities of this vessel will be similar to those of Condor Ferries, it is difficult to comment on the reliability of the vessel in the absence of a sufficient period of operation across the Channel in circumstances similar to those that would be confronted travelling between Jersey and the United Kingdom.

- From the information supplied there is no certainty that the fast ferries to be operated by Hoverspeed and P&O European Ferries would be less prone to technical problems than those operated by Condor Ferries.

### Promotion

25. P&O and Hoverspeed have the advantage of being able to call on their extensive marketing network in the United Kingdom.

### Fares

26. There is little to choose between the companies in their brochure fares both for visitors and Island residents but P&O are offering more attractive promotional off-peak fares.

### Schedules

27. With particular regard for requirements for onward travel and/or accommodation at the U.K. ports, P&O offers the more attractive package. P&O vessels arrive in Portsmouth in the evening at 2120. Hoverspeed and Condor have midnight arrival times at Weymouth, times that would become even more unsociable if service delays occurred during the day for any reason.

### Customer Care

28. All the shipping companies promise a high standard of customer care. P&O and Hoverspeed say they have more to lose if customer care is not maintained at a high standard because of the effect of adverse publicity upon their operations generally.

### General Points

29. P&O wishes to operate to St. Malo, and the existing operator on this route, Emeraude Lines, is unhappy with this proposal. P&O has an alternative proposal that excludes St. Malo but this would operate from Weymouth and the backup conventional ship would be operated from Portsmouth.
30. There is concern from the Commodore Shipping Company at the likely effect on their freight services if P&O and Hoverspeed are granted the ramp permit and operate a freight-carrying conventional ship in competition with Commodore. P&O have indicated that it could provide supplementary capacity if Commodore reduced its services in response to competition.
31. The proposals have also been evaluated by Jersey Tourism and the department's comparison of the proposals is attached at appendix B.

### Conclusions and Recommendations

32. The Jersey Transport Authority has had particular regard for the strength of support for Condor Ferries from the tourism industry backed by the Tourism Committee. Tourists account for 80% of the passengers carried and it is therefore right that considerable weight should be given to the industry's views.
33. At the same time the Jersey Transport Authority has a responsibility to protect the transport interests of Island residents as well as those visiting the Island. It is the independent traveller who has complained most about the lack of customer care offered by Condor Ferries through 1997.
34. The Jersey Transport Authority is recommending to the States that the Harbours and Airport Committee be requested to grant a ramp permit for three years to Condor Ferries to operate passenger and car carrying ferry services between the Island and the United Kingdom. It is doing so because among other things of a degree of uncertainty surrounding the service reliability of

the vessels to be used by the other companies, and on the understanding that, as a condition of a permit granted under the Harbours (Administration) (Jersey) Law 1961, as amended (which will replace the Harbours (Vehicle Ramps) (Jersey) Regulations 1996), the company will have signed a Service Level Agreement approved by the Jersey Transport Authority which will cover inter alia -

- guarantees of performance with recompense to travellers where the performance guarantee is not met (for example, where delays are in excess of an agreed minimum period and in particular where passengers are inconvenienced through the late arrival of the service);
- the provision of a Club Class facility;
- the reservation of an area of seating for car drivers and their passengers if they continue to be boarded after the foot passengers;
- the provision of a play area for children;
- the provision of improved facilities for the disabled;
- the provision of a conventional vessel from October 1998;
- the provision of satisfactory management and staff resources at each port to be used;
- a detailed customer care document setting out how delayed passengers are to be dealt with and in particular how the Company is to deal with those who have to move from one port to another either as foot passengers, in private cars or on board coaches;
- independent evidence of the ability of the Company to fund the investment required to provide the service offered, including the purchase of a new Ro-pax vessel, the purchase of Condor Vitesse and the buy-out of

Holyman (currently a fifty per cent shareholder in the Company);

- the arrangements that will be put in place to ensure that if there are disruptions with the fast ferry services the conventional vessel will maintain sufficient spare capacity to be able to cope with such a situation.

35. The Jersey Transport Authority has made it very clear to the new Chairman of Condor Ferries that if their service falls short of what is expected during the three-year period of the permit, it will not be renewed.

**APPENDIX A****SERVICE LEVEL SPECIFICATION IN RESPECT OF PASSENGER AND CAR FERRY SHIPPING SERVICES TO BE OPERATED BETWEEN JERSEY AND THE UNITED KINGDOM****Services**

1. The operator of passenger and car ferry shipping services between Jersey and the United Kingdom utilising the roll on/roll off ramp facilities in St. Helier Harbour will be required to provide a reliable frequent service. Information is required on the arrangements for a back-up vessel should one be required, and what weather and sea state conditions would prevent a service being operated. On frequency, information should be provided on the number of days in each calendar year that two, one or no sailings would be operated. Information is also required on the length of time the sea journey will take, and on the number of services where the routing would be direct to the Island or via Guernsey (inward or outward). The routing of the vessel should be the same or better than the existing service.

**Selection of Ports**

2. The United Kingdom port(s) selected for the service must have -  
  
good accessibility by public roads/public transport;  
good harbour facilities and adequate water;  
good passenger facilities and sufficient capacity to handle passengers should services be delayed for technical or weather reasons;

The authorities will wish to know why the port chosen is considered to be superior to the other options with regard to the above requirements. Information will also be required on the capacity and quality of passenger facilities that will be made available.

The authorities accept that in an emergency the operator may need to choose a port that is not deemed suitable but is in the



correct geographical area. The authorities would expect that the use of such a port would be for the period of the emergency only plus reasonable transition time.

### **Selection of Vessels**

3. The authorities will require information on the nature (i.e. high speed or conventional ferry) and configuration (capacity, facilities offered) of the vessel(s) to be used. The vessels used would be required to -

- be of a high standard of quality, safety and reliability;
- conform to appropriate national/international regulations/standards;
- comply with any statutory regulations imposed by the insular authorities;
- be manned, fitted and in such condition as to provide reasonable standards of services/facilities and to meet insurance certifications;
- have sufficient seat and vehicle capacity to meet demand;
- be so configured as to enable persons as families or other small groups travelling together to sit together.

The preference is for a high speed vessel to be used. Information will be required on the policy to be adopted in the allocation of seat and vehicle capacity, including the proportion of seats to be made available to tour operators. Also the booking policy for passengers accompanying cars vis-à-vis foot passengers, and the booking policy of the allocation of seats and car spaces between Jersey and Guernsey.

### **Promotion**

4. The authorities will require details of how the passenger shipping services are to be promoted through marketing in the United Kingdom. It is expected that the operator will consult with the Island's tourism authorities on the marketing programme so that this can be co-ordinated with the marketing activities of the authorities.

5. The authorities will expect that brochures are made available sufficiently in advance for the effective marketing of the service. It is also expected that the brochures will contain details of the daily schedules, including any variation due to tidal conditions, and information on the fares and charges payable.

## **Fares**

6. The authorities will expect the operator to provide a package of fares and charges that are not excessive, and which includes special fares/charges to tour operators and to encourage traffic growth. The operator is also expected to offer equivalent fares and charges whether travellers originate from the Island or from the United Kingdom.
7. The authorities will expect to receive information on the level and structure of the fares to be charged.
8. The authorities will expect that published fares and charges are increased only in accordance with arrangements previously agreed with the Island authorities. When the operator wishes to introduce a new class of fare or charge, the authorities would expect to be given written notice of this with details, including applicability, reasons for introduction and estimated effect.
9. When the operator wishes to increase any of its published fares/charges (without introducing a new class of fare/charge) the authorities would expect to be given a minimum of one month's notice together with reasonable explanation for the proposed increases. The authorities intend to put in place arrangements whereby if an increase in fare/charge is considered to be excessive the matter would be sent to arbitration. While the matter is with the arbitrator the operator would be required to apply an increase of no more than the retail prices index figure - 0.5 per cent.
10. When the operator wishes to introduce special fares/charges for a limited period which are less than previously published

charges, the authorities would expect to be given written notice of this with details of the dates and services affected.

### **Schedules**

11. The authorities will require information on the expected scheduled time of sailings which must meet the reasonable requirements of customers, and have particular regard for requirements as to onward travel and/or accommodation availability at the points of origin/destination.
12. The authorities will expect an operator to invite them to make suggestions on the proposed sailings schedules for a 12 month period from 1st January and have the opportunity to make such suggestions not less than three months before finalisation of the schedules. If schedules subsequently change, the authorities will expect to be notified of that change. Any changes, however, must not conflict with previously notified uses of the vehicle ramps.
13. The operator will be required not to reduce its published scheduled services unless due to lack of ramp slots, tidal conditions or weather conditions.
14. The operator will be required to state what quality standards it would expect to meet in terms of the proportion of total sailings operated within 15 or 30 minutes of the schedules arrival and departure times.

### **Customer Care**

15. The authorities will require information on the arrangements/procedures for handling passengers including -
  - the number of support staff available on a permanent basis in Jersey and at the United Kingdom port, and the extent to which this number can be enhanced when passengers affected by delays due to technical or weather conditions need to be handled;

- whether there will be a Jersey-based manager;
  - what training is given in customer care. The authorities would wish to receive a copy of a customer care manual which includes details of the arrangements for handling passengers, particularly where services are disrupted by weather conditions or technical problems;
  - what arrangements will be put in place for financial compensation, overnight accommodation, or alternative transport where services are disrupted by weather conditions or technical problems;
  - onboard catering facilities, capacity and service standards;
  - cleaning routines for the interior of the vessels.
16. The authorities will require information on the facilities that will be provided for those with special needs - e.g., the disabled, parents with young children, young children generally.

### **General**

17. The authorities expect the operator to provide a bond sufficient to cover one months harbour dues.
18. The authorities intend to put in place a procedure whereby any dispute/difference between the authorities and the operator could be referred to an arbitrator appointed with the agreement of both parties.
19. The authorities would wish to know what service a new operator would be able to provide if the existing carrier was to withdraw before the end of 1998.
20. There will be a contract period of a minimum of three years.

### Jersey Tourism: Comparisons of proposals

	Condor	P & O	Hoverspeed
<b>UK port selection fast ferry</b>	Weymouth and Poole offer fast crossing time and good catchment areas. (3h.15 Weymouth - Jersey) (3h.45 Poole - Jersey)	Portsmouth is too far as a fast ferry point. (4h..55 Portsmouth - Jersey)	Weymouth is considered to have the potential for delays at midday periods.  Weymouth only as a departure point reduces options from Poole which has been favoured by customers and by the industry. (One only catchment area.)
<b>for</b>	Condor timings have been well-planned to avoid the more difficult periods of operation at both Weymouth and Poole. However, some arrival times in Jersey are late.  For fast ferries, customer demand is driven by length of crossing in combination with catchment area.	P & O have suggested an option of Weymouth but without much conviction in the tender document.  Customer resistance has been identified for a near five hour crossing time.	Strong emphasis on duty free exit shopping at Weymouth port within a new terminal.  Limited freight opportunities from Weymouth.
	Day trips are available - 30,000 in 1997 - and are considered a market segment capable of producing significant growth.	No day trips from Portsmouth.	Day trips are available.

## Condor

## P & O

## Hoverspeed

### Conventional ferry

New 500 capacity ro-pax will be commercially viable because it will replace an existing freight ship already under the same corporate flag.

This should create a sustainable reliable service without detriment to existing freight operators.

Larger ferry, possibly 1,000 passengers capacity + 330 cars, would be able to clear backlog more easily than Condor.

However deployment time is slow and the chances of weather delays at peak season are small.

Would impact on current freight arrangements (over capacity). Unlikely to restrict service to light vans, etc. as suggested in tender.

Five ships on consideration list were all old and in need of refitting. Do these ships actually fit into St. Helier Harbour?

Both the King Orry and Lady of Mann are old ships previously used on the Isle of Man route. (Lady of Mann is a side loader. King Orry 23 years old)

Strong concerns over sustainability of leaving a ship as standby for eight months fully crewed, etc.

Slow deployment time will affect passengers at times of weather delays.

Commercially - likely to only be a very small demand for an old conventional ferry even with price advantages.

## Condor

## P & O

## Hoverspeed

### Fast ferries

Incat catamarans are tried and tested on the routes proposed.

Engines are believed now to be more reliable with modifications undertaken by Condor in late 1997.

High standards of comfort and service are available on board.

Austral Ferries are not tried and tested on either of the two proposed routes.

Concerns have been expressed regarding the comfort and sea keeping in heavy head-seas.

High standards of comfort and service are available on board.

Seacat has a 3.0m wave height restriction which will result in more cancellations than both P & O or Condor.

Vessel unproven in a beam sea operation.

High standard of comfort and service available on board.

### Customer care

Condor have specified their contingency plans in the event of weather or operational delays. These include flights, meals, etc.

A Port Manager has already been appointed for Jersey. 19 permanent staff Jersey, 22 seasonal.

Proposed enlargement of customer handling department. Ten permanent staff and six seasonal staff to be employed.

No details given on contingency plans for customer during delays.

Good training manual presented with tender documents.

Reference to transfers between United Kingdom ports but no specific information on proposals for technical or weather delays on Channel Island routes.

24 hours customer hot line. Staff level details not provided for Channel Island route.

Marketing Issues	Condor	P & O	Hoverspeed
<p>Condor do not have the brand strength of P &amp; O or the same level of distribution in the United Kingdom and continental source markets. This is an area identified for improvement.</p> <p>However they have invested significantly in the marketing of the route, and off-season in particular.</p> <p>Experience and dedication count for much in a niche market.</p> <p>Condor management are accessible and responsive to the industry. Many successful promotions have been undertaken with tour operators and Jersey Tourism.</p> <p>Condor are respected by the industry as business partners prepared to invest in the Jersey market.</p>	<p>Strong brand name, excellent network for product distribution through travel trade, shareholders and independent customers.</p> <p>Separate Channel Island brochures have been promised together with a new tour operation (offer for new tour operation since withdrawn by Richard Kirkman 12th May).</p> <p>No detail available for tour operators, despite formal request, on fare levels and IT (trade fare) availability.</p> <p>Promise of fares no higher than Condor in 1999.</p>	<p>Good brand name - mixed reputation in travel trade for service.</p> <p>Distribution stronger than Condor but inferior to P &amp; O. Good penetration in North European markets.</p> <p>Separate brochures proposed for Channel Island operation.</p> <p>Proposed own programme of short breaks. Dedicated sales team.</p>	<p>Poor quality information available despite request at Jersey Tourism London meeting. (Tour operators were unanimous in their view that they would have difficulty in working co-operatively with Hoverspeed following a meeting in London.)</p> <p>Strong industry opposition to the proposal of offering lower fares - five per cent less to Channel Island residents who form only 20 per cent of the market. This will cause problems in the United Kingdom source market.</p>



**Condor** **P&O** **Hoverspeed**

**Public fares**

Maximum increase for 1999 three per cent  
 Apex early booking.  
 Nominal supplement - club class.  
 Contract rates.  
 Subject to negotiation.  
 Five day special rates  
 1998 fare details given.

Two tier policy. Off-peak incentives. No higher than Condor 1998.  
 Five day/ten day returns.  
 No fare details given.

Similar public fares to those currently quoted. 15 per cent reduction for conventional ferry. Five per cent reduction for Channel Island residents.

Business and other promotional fares.

**Organisation commitment**

Condor will be run by a Channel Island owned company. Their business focus will be the Channel Islands.

The Channel Islands will be only one of many destinations served by P & O.

Part of Sea Containers who previously operated to Channel Islands.

Experience of Isle of Man Channel Islands would be one of many destinations served.