



**TRANSPORT
SCOTLAND**
CÒMHDHAIL ALBA

Analysis of responses to a public consultation on the next Northern Isles Ferry Services contract (NIFS4)

Analysis report

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Introduction

This report presents question by question analysis of responses to a public consultation on the next Northern Isles Ferry Services contract (NIFS4), to commence in 2028. A summary report is also available at:

<https://www.transport.gov.scot/publication/summary-of-responses-to-the-public-consultation-on-the-next-northern-isles-ferry-services-contract-nifs4-thematic-summary/>.

Background

It is essential that the ferry services linking Orkney and Shetland with mainland Scotland are reliable, resilient and deliver for the needs of islanders, businesses and visitors. Transport Scotland wants to hear the experiences and expectations of those who use and depend on these services to inform development of the next NIFS contract. This contract, alongside the programme proposed for the replacement of five vessels set out in the Islands Connectivity Plan, will help ensure the services remain fit for the future in relation to reliability, resilience and capacity.

Knowledge gained through Transport Scotland's existing relationship with NIFS users, and the feedback received from last year's Islands Connectivity Plan public consultation and engagement will help inform the development of the next NIFS4 contract. This feedback was considered in the development of the consultation questions.

The consultation exercise was launched on 22 July and ran until 20 October 2025. It asked 18 questions providing an opportunity to contribute to the contract development process and to shape the future of ferry services.

The consultation documents are available at [Northern Isles Ferry Services 4 - Scottish Government consultations - Citizen Space](#).

Profile of responses

A total of 1,129 responses were available for analysis, a small number of duplicate responses were removed before the analysis was undertaken. Most of these (1,106 responses) were submitted through the Scottish Government's Citizen Space consultation analysis platform.

A further 23 responses were sent directly to the Transport Scotland contract development team. A further response was an additional document to a submission

already submitted through Citizen Space. Some of these followed the question structure set out in the consultation and a small number were statement style responses. The content of these latter responses has been analysed at the most appropriate consultation question.

Respondents were asked to identify whether they were responding as an individual or on behalf of a group or organisation. Group respondents were allocated to one of eight groups by the analysis team. A breakdown of the number of responses received by respondent type is set out below, and a full list of group respondents appended to this report as Annex 1.

Table 1: Respondents by type

Type of respondent	n
Organisations:	No Data
Farming or land management organisation	2
Freight company or representative body	3
Local authority or transport partnership	3
Other business or representative body	5
Port/harbour authority	2
Public body	2
Trade union	2
Voluntary sector organisation	3
All organisations	22
% of all respondents	2%
Individuals	1107
% of all respondents	98%
All respondents	1129

Overall, 98% of respondents to the consultation were individuals with only 2% responding on behalf of an organisation. Individual respondents are broken down according to their respondent type and location in Table 3 (Chapter 2).

The number of responses from organisations was relatively low, including compared to previous Transport Scotland consultation exercises. For example, the 2024 consultation on a new Clyde and Hebrides Ferry Services contract (CHFS3) received 41 organisation responses, equating to 9% of all responses.

In addition to undertaking the online consultation, Transport Scotland held a number of engagement events during September 2025. Further information on these events is set out in Table 2 below.

Table 2: Engagement events

Location	Date	Number of sessions	Number of attendees
Lerwick, Shetland	18-19/09/25	5	78
Kirkwall, Orkney	10/09/2025	2	11
Stromness, Orkney	12/09/2025	2	15

Transport Scotland recorded feedback from those attending the events, analysis of which has also been included within this report.

The analysis team was also supplied with a minute of a meeting between Transport Scotland and a representative of the Mobility and Access Committee for Scotland and a report from a Shetland Youth Voice Transport summit held in January 2025.

Analysis and reporting

The report presents a question-by-question analysis of answers to the closed questions. The analysis uses variable bases i.e. includes only those who answered the closed question. Please note that percentages may not sum to 100% due to rounding.

The analysis at the open questions (Questions 1, 3, 5 etc.) and of further comments at closed questions (Questions 2, 4, 6 etc) is qualitative. If a point was more frequently raised this will be indicated; for this analysis, a point is considered to be frequently made if at least 1 in 10 of those commenting raised the issue.

Please note that at open questions this will relate to all comments made at the question. Where the analysis follows on from a closed question, it will refer to those who answered the closed element in a particular way and then went on to comment. For example, at Question 4, those who supported RET fares being introduced and then went on to comment.

Otherwise, the focus is on setting out the range of issues raised. This approach reflects not only the relatively small and self-selecting sample, but also the nature of qualitative data of this type. For example, comments may vary considerably in length, focus and precision. Some may address the question directly; others may make more general observations. Given this diversity, it is often the case that specific points have been made by only a small number of respondents.

Feedback from the events has been analysed across each of the themes covered by the consultation and a summary analysis of views expressed at the stakeholder events is presented in text boxes in some of the chapters.

Finally, and as with any public consultation exercise, it should be noted that those responding generally have a particular interest in the subject area. Therefore, the views they express cannot necessarily be seen as representative of wider public opinion.

Information about respondents and why they use NIFS services

The main consultation asked respondents questions about themselves and their use of the NIFS network.

Which of the following best describes you?

Individual respondents were asked to select which type of respondent best described them. A small number of individual respondents noted a connection to a business (Shetland, Orkney or mainland based) but submitted their response as an individual rather than an organisation.

Table 3: Responses by user type and location

Respondent type	Total
NIFS network resident – Orkney	256
NIFS network business – Orkney based	3
Orkney total	259
% Orkney based	23%
NIFS network resident – Shetland	730
NIFS network business - Shetland based	8
Shetland total	738
% Shetland based	67%
NIFS network user – Scottish mainland	49
NIFS network business – Scottish mainland based	4
NIFS visitor or tourist	37
Other (i.e. completing on behalf of a group)	4
(Not answered)	16
All other individuals	110
% other individuals	10%
All individual respondents	1107

Of the 1107 individual respondents, a majority – 67% – were Shetland based and 23% were Orkney based, meaning that overall, 90% of individual respondents were island based. Among the remaining 10%, the largest group were NIFS network users based on the Scottish mainland, followed by NIFS visitors or tourists.

If you selected business, please advise which type of business you represent (i.e. haulier, livestock, fisheries, energy, hospitality etc)

The list below covers those respondents who indicated an association with a NIFS network business (including those that are based in mainland Scotland) but submitted their response as an individual rather than an organisation. It also includes a small number of respondents who identified themselves as a resident at the previous question but then went on to note a type of business at this question.

Table 4: Type of business

Types of business	n
Charity	1
Cheese production	1
Education	2
Fisheries	3
Healthcare	1
Hospitality	2
Livestock	1
Tourism	2
Telecoms	1
Transport	1
Supplier to aquaculture industry	1
Weather	1
Whisky	1
Total	18

If you live on the mainland, please advise which local authority area you live in

Table 5: Responses by local authority area

Local authority area	n
Aberdeen City (Includes both 'Aberdeen' and 'Aberdeen City')	9
Aberdeenshire (Includes 'Grampian' as Aberdeenshire)	14
Argyll and Bute	3
City of Edinburgh	9
Clackmannanshire	1
East/Mid/West Lothian (Includes two unspecified 'Lothian')	5
Fife	6
Glasgow City	2
Highland (Includes 'Caithness', 'Ross-shire' and 'Inverness' as Highland)	10
Moray	3
Perth and Kinross	3
South Lanarkshire	3
Total in mainland Scotland	68
Elsewhere in UK	9
Total	77

Around a third of respondents living on the Scottish mainland lived in either Aberdeenshire or Aberdeen City, with Highland Council and City of Edinburgh the next most frequent. Only nine respondents reported living outside Scotland.

Which route do you use most frequently?

Table 6 below sets out the routes used most frequently by individual respondents, according to whether they are Orkney based, Shetland based and then 'all other individuals'.

Table 6: Most frequently used route

Respondent group	Aberdeen - Kirkwall	Aberdeen - Lerwick	Kirkwall - Lerwick	Scrabster - Stromness	Total
NIFS resident – Orkney	82	2	13	161	258
Percentage	32%	1%	5%	62%	100%
NIFS resident – Shetland	1	723	9	0	733
Percentage	0%	99%	1%	0%	100%
All other individuals	6	66	0	21	93
Percentage	6%	71%	0%	23%	100%
All individuals	89	791	22	182	1084
Percentage	8%	73%	2%	17%	100%

Overall respondents used the Aberdeen - Lerwick service most frequently (73% of those who answered the question) although this rose to 99% of Shetland residents. Orkney residents were most likely to use the Scrabster – Stromness route (62%), although a substantial minority (32%) indicated that they use Aberdeen – Kirkwall most frequently. Other individuals were most likely to use Aberdeen –Lerwick, followed by Scrabster – Stromness.

Why do you mainly use NIFS network services?

Table 7 sets out the main reasons why individuals use NIFS services. Respondents were able to select more than one answer at this question. As respondents were able to select more than one option, the percentages set out represent frequencies and do not sum to 100%.

Table 7: Purpose of use of NIFS services

Respondent group	For business	For work/ education	For personal/ leisure	For freight	Other
Network resident – Orkney (n=259)	21	27	248	6	11
Percentage	8%	10%	96%	2%	4%
Network resident – Shetland (n=738)	48	114	718	28	64
Percentage	7%	15%	97%	4%	9%
All other individual respondents (n=110)	7	4	84	0	11
Percentage	6%	4%	76%	0%	10%
All individual respondents (n=1107)	76	145	1050	34	86
Percentage	7%	13%	95%	3%	8%

Individual respondents in all three groups were most likely to use NIFS services mainly for personal/leisure use, with work/education being the second most frequent reason among residents of both Orkney and Shetland (albeit at a slightly higher frequency for Shetlanders).

Among respondents who explained their ‘other’ reasons for using NIFS services the most frequent reason given was attending hospital or other medical appointments, followed by visiting family and attending or participating in sporting events.

How frequently do you use NIFS services?

Responses for individual respondents are illustrated in Chart 1 below with a full numerical breakdown in Annex 2.

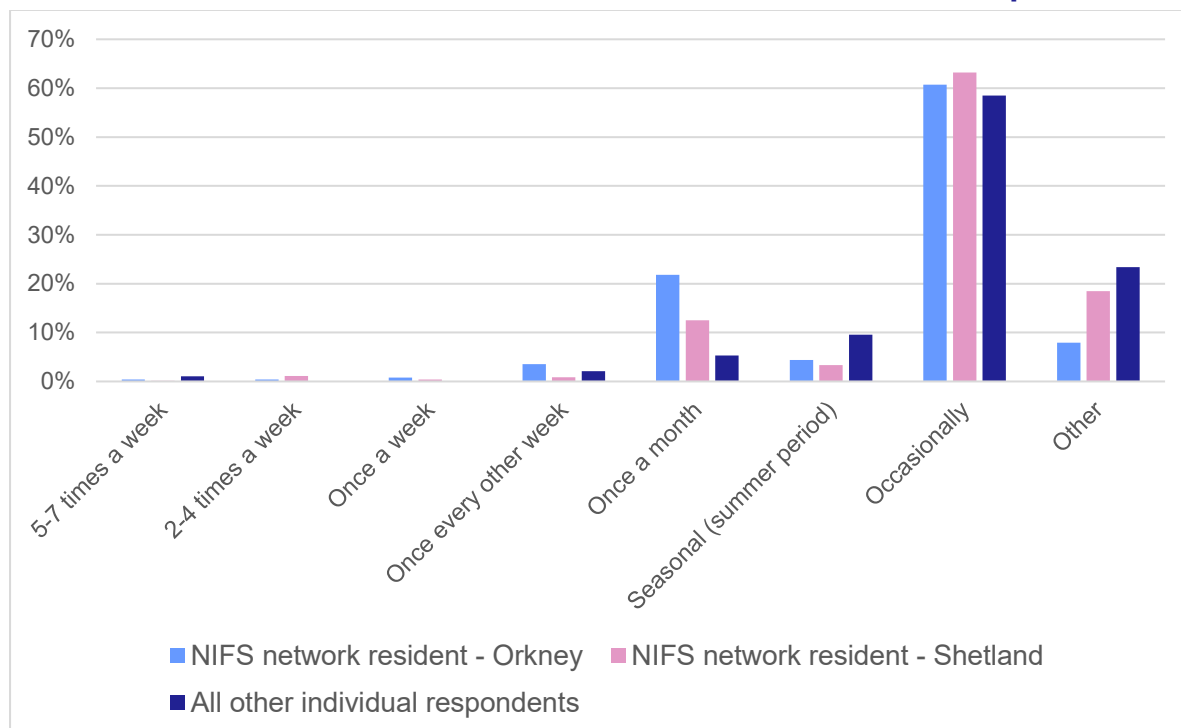


Chart 1: Frequency of use of NIFS Services

From the choices given on the consultation questionnaire, respondents were most likely to say they use NIFS services ‘occasionally’ (Orkney – 61%, Shetland – 63%, other – 59%), followed by ‘once a month’ (Orkney – 22%, Shetland – 13%, Other – 5%).

Among respondents who explained their ‘other’ frequencies, the most common were twice a year and two-three times a year. Other more frequent answers were:

- three or three-four times a year
- four, four-five or four-six times a year
- six times a year
- less often than desired, use being restricted by availability of cabin/vehicle space and or price

Relatively few ‘other’ frequencies were more than six trips per year.

How old are you?

Responses for individual respondents are set out in Chart 2 below with a full numerical breakdown set out in Annex 2.

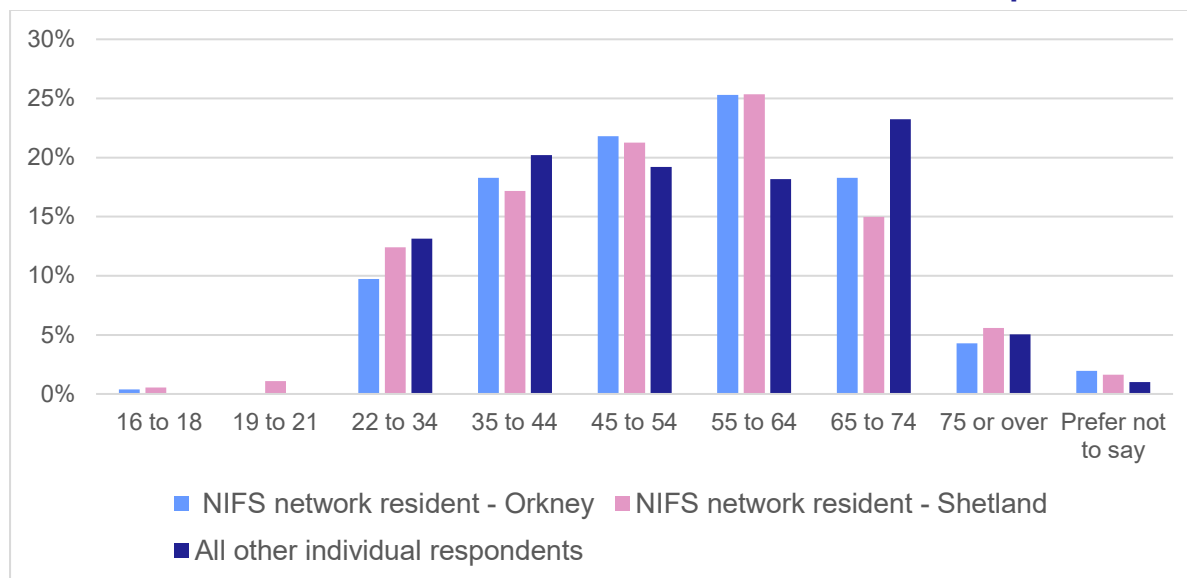


Chart 2: Responses by age bracket

Overall, respondents were most likely to fall in the 55-64 age bracket, followed by 45-54. While distributions for Orkney and Shetland were relatively similar, the ‘other individuals’ category was slightly different, with the highest number in the 65-74 bracket. Very few respondents were under the age of 22. There was no category for those under 16.

Do you consider yourself to have a disability?

Responses for individual respondents are set out in Table 8 below.

Table 8: Responses by disability status

Respondent group	Yes	No	Prefer not to say	Total
NIFS network resident – Orkney	40	208	8	256
Percentage	16%	81%	3%	100%
NIFS network resident – Shetland	100	594	34	728
Percentage	14%	82%	5%	100%
All other individual respondents	12	81	5	98
Percentage	12%	83%	5%	100%
Total individuals	152	883	47	1082
% of individuals	14%	82%	4%	100%

Percentages may not sum to 100% due to rounding.

Amongst individual respondents, 14% of those who answered the question said that they have a disability.

Capacity and demand

During 2025 and 2026 Transport Scotland will be carrying out a Community Needs Assessment. This project will provide evidence and ferry service options for the future Northern Isles Ferry Services (NIFS4) contract, as well as for planned capital investments in vessels and port.

Types of accommodation

Question 1 – Overnight accommodation on ferry services consists of different types of options. If you have used overnight accommodation on a service, please provide your views on:

- (a) overnight cabins**
- (b) overnight pods**
- (c) overnight reclining or standard seat**

Overnight cabins

Around 1075 respondents made a comment at Question 1(a).

The most frequently made points regarding cabins were that their quality is good or adequate, but that there is not enough capacity. Perceived reasons for this lack of capacity included a reduction in the number of available berths since it is no longer an option to book a single berth in a shared cabin, and there were calls for this facility to be reinstated on grounds of both availability and cost.

Event feedback

Feedback provided from the Stromness community event included:

“Would like to bring back shared cabins - feels unfair to have a whole cabin to self while others have nowhere to sleep.”

Feedback provided by attendees at the Lerwick event included:

“Bring back shared cabins – it’s happening unofficially anyway!”

Cabin quality and size

Positive features noted with respect to cabins included that they are usually clean and comfortable, and that having a TV is appreciated. Negative aspects, referenced by smaller numbers of respondents, included that:

- cabins are too small.
- cabins are dated or in need of upgrading.
- ventilation is poor, meaning cabins can be too hot.
- noise can be an issue (including from the car deck and barking dogs).

There were also references to showers being too small or prone to flooding, and to a lack of repair and maintenance (for example relating to TVs that do not work). There were requests for more power points and better WiFi. Overall, Orkney residents were likely to see cabin quality as slightly better than Shetland residents.

In addition to calls for an increase in overall cabin capacity it was suggested that there should be:

- more two berth cabins.
- a mix of single, couple and family cabins (including some cabins for families of more than four).
- consideration of crew accommodation standards and training berths for apprentices and cadets.

Cabin availability

It was reported that cabins are seldom available at short notice and need to be booked months ahead, with lack of availability meaning that, in some cases, people do not travel at all or have to use an alternative route. Some respondents described booking a cabin as important or essential, citing reasons relating to age, health or disability, personal security, being properly rested for onward travel, or the extent to which seasickness is improved by the ability to lie down. In general, Shetland residents were rather more likely to consider a cabin essential for travel than Orkney residents.

From a business perspective, a 'Farming or land management organisation' respondent reported that lack of short-term availability of cabin (and vehicle) space has caused delays in getting their equipment serviced or repaired.

In addition to a general requirement for additional cabins/berths, it was suggested that there should be both more accessible cabins and more pet-friendly cabins. It was noted that, at present, anyone can book these cabins, with a related suggestion that ability to book them should be restricted to those who need these special facilities. A further restriction, proposed by a small number of respondents (all of whom identified themselves as Shetland residents), was that on Aberdeen - Lerwick

services, passengers for Kirkwall should not normally be able to book a cabin as they will not be on board overnight.

While some 'Individual' respondents referenced the number of tourists and business passengers on sailings, a 'Local authority or transport partnership' respondent argued that the real issue is not competing priorities of different groups of passengers but a lack of capacity at peak times (both at pinch points in the week and at seasonal peaks). They suggested that the NIFS4 contract must address cabins as essential core capacity that is managed in a transparent manner.

Event feedback

Feedback from Lerwick included:

"The current cabins are good but availability is a huge problem."

"There is not enough capacity - especially if you need to travel at short notice."

"Acute issue booking a cabin and a car on the ferry between May to September now – some months there are only a handful of days or none at all."

Cabin price

The high cost of cabins was an issue for some respondents because the inability to book a berth in a shared cabin means that single travellers have to book a larger cabin than they need, with unused berths then wasted. The current pricing structure was also seen as contributing to the capacity problem since 4-berth cabins (all of which are inside, with no window) are cheaper than those 2-berth cabins that are outside (with a sea view).

Two 'Local authority or transport partnership' respondents were among those making points with respect to cabin pricing including that:

- since these are lifeline services, islander discounts should apply on vehicles and cabins, with no 'peak' season rates.
- for single, older passengers the value of concessionary travel (i.e. four free, single journeys per year, inclusive of a cabin) is being reduced as they are either required to surrender two vouchers for sole use of a 2-berth cabin, or pay a supplement for the unused berth.

It was suggested that, going forward, single older travellers should not be required to surrender additional vouchers or pay for unused berths, so that the concession

provides equal benefit to all over-60s, regardless of whether they travel alone or with others.

Cabin booking procedures

In addition to bringing back the ability to book a single berth in a shared cabin it was suggested that in future:

- booking windows should be extended to give all users scope to plan ahead.
- the current reserved space for travel relating to healthcare should be maintained or extended.
- block/group bookings should be capped and monitored.
- a transparent, sequential waiting list system should ensure that cancelled cabins are allocated fairly.

Overnight pods

Around 975 respondents made a comment at Question 1(b).

The most frequently made points about overnight pods were negative, with descriptions including that they are 'awful', 'terrible' or not fit-for purpose. Specific issues are discussed below. While expressing a view that pods may be suitable for some travellers, a 'Local authority or transport partnership' respondent noted that they have not been 'universally welcomed'. Although some respondents reported that having tried a pod they would not do so again, others observed that they have not, and would not try the pods, based either on their appearance or on feedback from others. Shetland residents were rather more likely to express the latter view than those from Orkney.

In contrast, a much smaller number of respondents described overnight pods as 'acceptable' or 'OK', and a very small number reported liking pods or considering them to be 'good'. Price relative to cabins was one of the positive reasons given for choosing a pod and a 'Local authority or transport partnership' respondent saw pods as a good mid-price option, providing improved passenger comfort while using space efficiently. It should be noted, however, that some of the respondents who found pods acceptable also raised similar problems to those cited by passengers who strongly disliked the pods.

Comfort and ability to sleep

A frequent view was that pods are uncomfortable, particularly for taller passengers. Not allowing the user to lie flat was also a frequently cited problem (particularly by

Shetland residents) and some respondents reported finding pods impossible to sleep in. Indeed, there was a view that it is preferable to sleep on the floor.

In addition to the design of the pods themselves, issues with several aspects of the pod lounges were raised, most frequently in relation to noise. Sources of noise included both fellow passengers (including when under the influence of alcohol, being sick and using mobile phones) and heavy doors opening and closing. Overly bright lighting and being cold were also referenced as making sleep difficult.

The lack of space between pods was also highlighted, and it was suggested that this contributes to a feeling of being over-crowded. It was also reported that the passenger in a pod next to the wall is required to climb over the person next to them in order to get in and out.

Safety and security

As well as a lack of privacy and the absence of anywhere secure to leave belongings, there were concerns that female passengers are not, or do not feel safe in mixed sex pod lounges, particularly in the absence of oversight by staff. A 'Local authority or transport partnership' respondent noted that although the operator says that lounges are monitored, passenger experience suggests that visible staff presence and better design are needed to provide reassurance. A small number of respondents reported that they, personally, had felt unsafe or intimidated in the pod lounge. While some respondents cited inebriated male passengers as a matter for concern, others said they were uncomfortable sleeping next to a male passenger that they do not know.

Event feedback

Feedback provided by attendees at the Kirkwall community event included:

“Using Aberdeen route to go for holidays, travelling as family with 3 children, pods don't feel safe, people drunk, loud!”

Views from the Stromness event included:

“Pod experience sharing with drunk people, staff not proactive to help resolve. Should divide men/women/couples.”

Comments from the event in Lerwick included:

“Pods are not fit for purpose – lay flat options with some privacy essential – not safe for single females (seen harassment first hand).”

Suitability

In light of all the above factors, it was argued that, in addition to taller people and (particularly single) female passengers, pods are also unsuitable for families with children, for groups of under 18s, or for elderly people and people with disabilities. It was also suggested that pods are also not suitable for people needing to drive or work the next day, or for those travelling to compete in sports competitions.

There was support for:

- continued research into lie-flat pod options, including Japanese-style pods/ couchette type bunk beds, with workable options taken forward.
- improved design and management of pod lounges to ensure dignity, safety and security with specific requests for single sex lounges, lounges specifically for pet owners, and more space between pods.
- pods as an affordable alternative, but not as a substitute for adequate cabin provision.

Overnight reclining or standard seats

Around 910 respondents made a comment at Question 1(c), with the most frequent view being that these seats are not suitable for overnight use. Often reflecting comments on overnight pods, respondents reported that reclining seats are uncomfortable, and do not allow the user to lie flat or to sleep. Also as with overnight pods, some respondents noted that they would prefer to sleep on the floor. The importance of lying down to avoid being seasick was highlighted by respondents who said they could not use reclining or standard seats.

Location was also viewed as a problem since reclining and standard seats are in open-access areas, with some respondents arguing that for this reason they are not suitable for children or safeguarding under 18s. The position towards the bow was also referenced as adding to discomfort in bad weather.

Respondents reported their ability to sleep being reduced by:

- bright lights that are not dimmed overnight.
- noise and disturbance caused by people moving about in public areas, by proximity to the bar or games machines and by other people being sick.
- the cold temperature.

The absence of any safe storage area was also noted.

Some respondents saw reclining or standard seats as an acceptable budget option with a view that they are preferable to pods. There were also suggestions with respect to potential improvements, both to the design of reclining seats themselves (including the ability to recline and providing better foot/leg support) and their environment (addressing the issues relating to lighting, noise and temperature and providing access to charging points). A ‘Local authority or transport partnership’ respondent also suggested creating designated seating zones (quiet, family, general) and providing accessible seating close to toilets and facilities designed for passengers with reduced mobility.

A late cancellation fee

The consultation paper noted that, on occasion, vessels showing as fully booked sail with empty spaces because some booked cars, lorries and/or cabin users do not show or fail to cancel.

Question 2 – Do you agree with the idea to implement a late cancellation fee for pre-booked tickets, in order to incentivise customers to cancel bookings with reasonable notice so that spaces can be made available to others?

Responses to Question 2 by respondent type are set out in Table 9 below.

Table 9: Responses to Question 2 by respondent type

Type	Respondent group	Yes	No	No opinion	Total
Individuals	NIFS network resident – Orkney	159	83	12	254
Individuals	% of NIFS network resident – Orkney	63%	33%	5%	100%
Individuals	NIFS network resident – Shetland	427	231	70	728
Individuals	% of NIFS network resident – Shetland	59%	32%	10%	100%
Individuals	All other individual respondents	64	23	8	95
Individuals	% of all other individual respondents	67%	24%	8%	100%
Individuals	Total individuals answering	650	337	90	1077
Individuals	% of individuals answering	60%	31%	8%	100%
Organisations	Farming or land management organisation	0	1	0	1
Organisations	Freight company or representative body	1	1	0	2
Organisations	Local authority or transport partnership	2	0	0	2
Organisations	Other business or representative body	2	0	1	3
Organisations	Port/harbour authority	2	0	0	2

Type	Respondent group	Yes	No	No opinion	Total
Organisations	Public body	1	0	0	1
Organisations	Trade union	1	0	0	1
Organisations	Voluntary sector organisation	0	2	1	3
Organisations	Total organisations answering	9	4	2	15
Organisations	% of organisations answering	60%	27%	13%	100%
Total	Total respondents answering	659	341	92	1092
Total	% of all respondents answering	60%	31%	8%	100%

Percentages may not sum to 100% due to rounding.

A majority of all respondents – 60% of those who answered the question – agreed, with the idea to implement a late cancellation fee for pre-booked tickets, while 31% did not agree and 8% had no opinion. Orkney based respondents were slightly more likely to agree than those from Shetland, at 63% and 59% respectively.

Around 850 respondents explained their answer.

Reasons for supporting a late cancellation fee

The most frequent position was support for a late cancellation fee which was seen as being fair and justified in view of limited availability, albeit with various safeguards in place to avoid people being penalised for events beyond their control. Encouraging people to cancel bookings they do not intend to use was seen as necessary to free up capacity and it was noted that it is difficult to book vehicle space as well as cabins making it very challenging to find both on the same sailing.

In terms of current practices that might be reduced by a late cancellation fee respondents highlighted:

- people who plan to fly to but also book a ferry crossing as a back-up, only cancelling the ferry once the flight is confirmed.
- businesses and tour companies that fail to cancel unused block bookings.

Event feedback

Feedback provided by attendees at the Lerwick community event included:

“Group bookings for workers also take up valuable cabin spaces – no use for us trying to get away – spaces do become available last minute if flights go – but that’s no use if we need hotel /Air BnB places!”

Reasons for opposing a late cancellation fee

Reasons that a late cancellation fee was not supported included that flexibility is an important aspect of the current booking system and that a lifeline service should allow such flexibility as people’s plans will change. Additional issues affecting travel for those living on the smaller/outer islands were also highlighted.

Some respondents, predominantly Shetland residents, argued that it is necessary to book a back-up ferry place in case flights do not operate (for example because of fog or unreliability on the part of the air service operator). This included a small number of respondents who reported doing this themselves.

It was also argued that:

- there is a waiting list for late availability, so space does get used.
- tickets are already expensive.
- it is limited capacity that means it is necessary to book well ahead and it is this capacity that should be improved.

A ‘Farming or land management organisation’ respondent reported that as a business dealing with uncertainty on dates and inadequate capacity, their only option is to make advance bookings that they may have to cancel. Similarly, a ‘Freight company or representative body’ respondent reported that their reasons for withdrawing a pre-booked vehicle could include factors outside their control, such as poor weather impeding fishing and aquaculture operations and internal ferry disruptions.

Features of any late cancellation system

Some respondents argued that, if a late cancellation charge is introduced, the system must be designed carefully, with a focus on maximising effective capacity rather than penalising users. It must be fair, with appropriate exemptions in place.

Who would pay?

Expectations varied with respect to who might be required to pay a late cancellation fee, with businesses being the most frequent suggestion followed by tourists/non islanders and block bookings. Other suggestions related to tour buses, freight bookings and ‘repeat offenders’.

Some respondents were clear that they would not support a late cancellation fee for islanders, with reasons tending to reflect those for opposing a late cancellation fee at all, including the importance of flexibility on a lifeline service and the unreliable or unpredictable nature of air services.

Appropriate exemptions

It was also argued that islanders should not be penalised when there are late changes of plan beyond their control. Examples included:

- in case of illness or changes to medical appointments.
- if a sailing is missed due to late flights, delayed connections, vehicle breakdown or being stuck in traffic.
- weather-related travel issues.
- cancellation of a sports club's fixture.

What is 'reasonable notice'?

There were differing views with respect to what might constitute reasonable notice after which a charge might apply, with suggestions including:

- a relatively long period – for example less than 7 days, 14 days or less than a month.
- a shorter period – for example the day of travel, less than 12 hrs or less than 48 hrs.
- no show or failure to cancel before the ship departs.

A 'Local authority or transport partnership' and a 'Public body' respondent argued that a late cancellation fee should only apply within 24 hours of the sailing time, seeing this as the point from which there would be little opportunity to reallocate space.

Scale of charge

The small number of respondents who made specific suggestions on the potential scale of a late cancellation fee envisaged very variable charges, ranging from the whole cost of the booking to only a nominal amount, including a sliding scale depending on the time that the booking is cancelled.

Other requirements of a late cancellation fee system

If the idea of a late cancellation fee is taken forward it was argued that there must be:

- an easy way to cancel at any time and by a variety of routes (online, phone, or app channels) to encourage timely release of space.
- regular publication of data on cancellations, reallocations and recovered capacity to demonstrate impact.
- reallocation of cancellations through a transparent, sequential waiting list system to demonstrate fairness and encourage trust.
- consultation with recognised trade unions representing the operator's ticket sales and inspection staff over the design and advertising of a fee system, to avoid any increase in aggression towards staff from passengers dissatisfied by the policy.

Unplanned and essential travel

While most journeys are booked in advance, sometimes pre-booking a ticket will not be an option and last-minute booking might be required.

Question 3 – What do you think the operator could do to further support those who need to travel urgently?

Around 995 respondents answered Question 3.

Reserving capacity for local residents

The most frequent suggestions related to the operator reserving capacity for emergency travel, either setting aside cabins or vehicle space for emergency use, or reserving capacity for lifeline travel. Shetland residents were more likely to highlight the need to reserve cabins for emergency use while a larger proportion of Orkney residents commented on the importance of vehicle space. A small number of respondents gave examples of circumstances where individuals or families have been unable to travel in an emergency situations or highlighted limitations around the existing allocation of travel space for NHS treatment. A 'Local authority or transport partnership' respondent argued that the next NIFS contract should make explicit provision for last-minute, urgent travel as a reality of island life.

There was some variation in the number of spaces that respondents envisaged might be kept for emergency use: with respect to cabins, respondents who suggested a particular quantity typically proposed a only small number (either one or two cabins,) with fewer opting for a larger number (of up to 10 or 10% of cabins).

Additionally, there were more general requests to 'prioritise' travel for islanders or to keep an allocation of cabins or vehicle space for use by local residents, and calls for the operator to prioritise the interests of islanders over those of tourists. A small number of respondents expressed their feeling that the present service is being run to benefit tourism rather than as a lifeline service for islanders.

It was also suggested that the operator could support urgent travel by local residents by: providing real-time availability updates through the booking system and at terminals; reducing the required check in time; restricting block bookings by businesses; removing freight traffic from passenger vessels; or allowing passengers to travel on freight services.

Event feedback

Feedback provided by attendees at the community event in Stromness included:

“Urgent travel very difficult on Aberdeen boat, especially if you need to take a car.”

Comments from the event in Lerwick included:

“Freight and tour operator block bookings cause islander problems.”

“Islanders must be a priority - this is not a cruise ship.”

Increasing total capacity

There were calls to support urgent travel by increasing total capacity for both cabins and vehicles (particularly during the summer months) by providing:

- larger vessels or a larger fleet.
- more cabins.
- shared cabins.
- more sailings and specifically daytime sailings.

Managing emergency travel

With respect to how any reserved capacity for urgent travel might be managed suggestions included that:

- criteria and processes for access to reserved space would need to be defined clearly.
- a user-friendly process for accessing reserved space would be required, with the operator providing guidance on how to access emergency spaces via their website and a staffed helpline or online function to ensure urgent cases are assessed fairly and consistently.
- operator staff should be trained to manage situations where last minute travel is required.
- a lower fare could be charged for emergency, medical or compassionate travel.

- any reserved space not required for emergency travel should be released to the waiting list, with the most frequent suggestion that this should be at departure, followed by various points earlier in the same day.

Other points on the operation of a waiting list included that there should be a transparent system that reallocates cabin or vehicle spaces that become available to the passengers at the top of the list, and that those needing to travel in an emergency should be prioritised ahead of other users on the waiting list. Regular publication of data on urgent allocations and waiting list outcomes was also suggested.

It should be noted that respondents also reported that the current operator's staff already do their best to accommodate passengers needing to travel at short notice, although one 'Trade union' respondent suggested that more staff in passenger adviser roles could be provided.

Fares

The consultation paper noted that, although there are seasonal and islander fares (a discount of 30% year-round), travel on Northern Isles Ferry Services can be expensive for some. Transport Scotland was interested in hearing views on future fares policy.

The Road Equivalent Tariff (RET) is a distance-based fares structure with a formula for calculating fares comprising:

- A fixed element (to ensure services remain sustainable and to cover fixed costs such as maintaining harbour infrastructure and vessels); and
- A rate per mile (calculated by Transport Scotland analysts, using contemporary independent research by the RAC).

RET fares were rolled out across all Clyde and Hebrides Ferry Services (CHFS) routes by October 2015. In the [Islands Connectivity Plan Strategic Approach](#) Transport Scotland committed to considering changes to how the RET formula is applied on longer routes (for example Aberdeen – Kirkwall - Lerwick). This could include reducing the mileage rate or capping at the current mid-season fare.

Introduction of Road Equivalent Tariff fares

Question 4 – Would you like to see the introduction of Road Equivalent Tariff fares for islanders on the Northern Isles Ferry Services routes, with fares changed to be directly proportional to distance?

Responses to Question 4 by respondent type are set out in Table 10 below.

Table 10: Responses to Question 4 by respondent type

Type	Respondent group	Yes	No	Total
Individuals	NIFS network resident – Orkney	195	37	232
Individuals	% of NIFS network resident – Orkney	84%	16%	100%
Individuals	NIFS network resident – Shetland	287	268	555
Individuals	% of NIFS network resident – Shetland	52%	48%	100%
Individuals	All other individual respondents	47	32	79
Individuals	% of all other individual respondents	59%	41%	100%
Individuals	Total individuals answering	529	337	866
Individuals	% of individuals answering	61%	39%	100%
Organisations	Farming or land management organisation	0	1	1
Organisations	Freight company or representative body	0	2	2
Organisations	Local authority or transport partnership	2	0	2
Organisations	Other business or representative body	3	0	3
Organisations	Port/harbour authority	0	1	1
Organisations	Public body	0	0	0
Organisations	Trade union	0	0	0
Organisations	Voluntary sector organisation	2	0	2
Organisations	Total organisations answering	7	4	11
Organisations	% of organisations answering	64%	36%	100%
Total	Total respondents answering	536	341	877
Total	% of all respondents answering	61%	39%	100%

A majority of respondents – 61% of those who answered the question – said they would like to see RET fares for islanders on NIFS routes, while 39% would not. However, while 84% of Orkney residents agreed with RET fares, this fell to only 52% of Shetland residents.

Around 835 respondents explained their answer.

Reasons RET fares on NIFS routes are supported

The high cost of travel to the Northern Isles, a desire to see reduced fares, and fairness in relation to other areas of the ferry network were the more frequently given reasons for supporting RET fares for islanders.

Respondents from Orkney were most likely to cite fairness as a reason for supporting RET fares with some noting that these fares are already available on services in the CHFS area. This view was apparently linked to an expectation that application of the RET formula would reduce fares to Orkney, and two 'Local authority or transport partnership' respondents and a 'Public body' respondent expressed a view that the current RET formula would indeed reduce fares across the Pentland Firth.

In contrast, the most frequent point from Shetland residents was that they would support RET fares *only* if prices were reduced as a result. Shetland residents were also more likely to feel that they had not been provided with sufficient information on the impact of RET fares to allow them to answer the question.

Event Feedback

Feedback from the event in Stromness included:

"Fare parity with Western Isles a must."

"Okay for islanders with discount. Also good for 'oldies' with travel vouchers. But expensive for others without RET - need to get this sorted."

Reasons RET fares on NIFS routes are not supported

A view that RET fares might be more expensive, particularly for Shetland, was the main reason for not supporting their introduction. Again, these points were more likely to be raised by Shetland residents than those from Orkney. Some respondents expected that while Orkney residents would benefit from RET fares Shetlanders could be disadvantaged.

Other issues raised

Other points, raised by both those who supported RET fares and those who did not, included that the RET formula would require adaptation for longer routes, with a 'Local authority or transport partnership' respondent noting that application of the current formula on the Aberdeen-Kirkwall-Lerwick route could lower some visitor passenger fares, but significantly increase islander car fares when compared to existing islander discount levels. This issue is considered further at Question 5.

There were also concerns among 'Individual' respondents that lower fares risked increasing demand from tourists, thereby making current capacity problems worse, with an associated view that reduced fares should be reserved for local residents. However, a 'Local authority or transport partnership' respondent highlighted the

economic benefits tourism bring to island economies and an ‘Other business or representative body’ respondent argued that RET fares should be extended to residents in remote mainland areas such as Caithness. A ‘Port/harbour authority’ respondent suggested residents in the KW1 postcode area. A specific concern raised by a ‘Trade union’ respondent related to the number of motorhomes travelling on CHFS routes and the disproportionate deck space that they occupy, with an argument that this outcome should be avoided on NIFS routes.

Another ‘Trade union’ respondent highlighted the importance of financial sustainability for the operator, highlighting concerns that a fare policy that overly reduces revenue could impact both investment in new vessels and staff training and lead the operator to seek cost savings, including labour cuts.

Points were also raised with respect to the existing islander discount scheme which some respondents saw as acceptable or preferable to RET fares and others suggested should be retained even if RET fares are introduced. However, there was also a view that island residents should not pay seasonal fares.

Other suggestions with respect to RET fares included that they should apply to:

- overnight accommodation, as this is an essential part of travel on NIFS routes.
- Pentland Ferries services.
- road freight vehicles longer than the 6m cap applied on the CHFS network.

Event Feedback

Comments from attendees at the event in Lerwick included:

“Need islander discount all year at lower rates.”

“One price for tickets, cabins etc for islanders for all year – we need the lifeline service all throughout the year – shouldn’t be seasonal pricing for islanders.”

Application of the RET formula on longer routes

Question 5 – Do you have comments or suggestions on changes to how the RET formula will be applied on longer routes?

Around 505 respondents answered Question 5, although with frequent comments including that the respondent did not understand the RET formula or had not been

provided with enough information (for example price comparisons) to be able to give an informed view.

Otherwise, the most frequent comment was a desire for fares for islanders to be reduced, by whatever mechanism, with a 'Public body' respondent arguing that any changes must result in reduced costs for islanders.

There was also support for:

- a revised pricing structure including a reduced mileage rate.
- including accommodation costs in the RET formula or retaining the existing resident cabin discount, and exploring further relief where overnight accommodation is unavoidable.
- capping fares at mid-season levels or at low season levels - the latter effectively removing seasonal pricing for islanders.

Illustrating potential worries that fares might go up if RET pricing is introduced, a small number of respondents (all Shetland residents) expressed concern that a fare from Aberdeen to Lerwick might be increased by the added distance required to call at Kirkwall in comparison with a direct route. They saw this prospect as unfair.

Other points on potential application of a revised RET formula included that:

- development of any new formula should involve local businesses and proposals should be subject to public consultation.
- islander discounts should be protected so that residents' fares remain affordable and clearly distinct from visitors' fares.
- hybrid models (such as applying RET to passenger fares while capping or adapting vehicle and cabin charges) should be considered.
- the model should ensure financial stability for the operator as well as affordability for passengers and any new model should be fully costed to provide for long-term investment in fleet renewal and workforce development.

Dynamic pricing

Question 6 – Would you like to see more dynamic pricing for visitors, aimed at managing demand and supporting RET for islanders?

Responses to Question 6 by respondent type are set out in Table 11 below.

Table 11: Responses to Question 6 by respondent type

Type	Respondent group	Yes	No	Total
Individuals	NIFS network resident – Orkney	158	53	211
Individuals	% of NIFS network resident – Orkney	75%	25%	100%
Individuals	NIFS network resident – Shetland	441	160	601
Individuals	% of NIFS network resident – Shetland	73%	27%	100%
Individuals	All other individual respondents	44	47	91
Individuals	% of all other individual respondents	48%	52%	100%
Individuals	Total individuals answering	643	260	903
Individuals	% of individuals answering	71%	29%	100%
Organisations	Farming or land management organisation	0	1	1
Organisations	Freight company or representative body	0	1	1
Organisations	Local authority or transport partnership	0	2	2
Organisations	Other business or representative body	1	1	2
Organisations	Port/harbour authority	1	0	1
Organisations	Public body	0	1	1
Organisations	Trade union	0	1	1
Organisations	Voluntary sector organisation	1	1	2
Organisations	Total organisations answering	3	8	11
Organisations	% of organisations answering	27%	73%	100%
Total	Total respondents answering	646	268	914
Total	% of all respondents answering	71%	29%	100%

A majority of respondents – 71% of those who answered the question – said they would like to see more dynamic pricing for visitors, while 29% would not. While similar proportions of Orkney and Shetland residents supported dynamic pricing (75% and 73% respectively) among other individual respondents (predominantly residents on the Scottish mainland and visitors/tourists) 52% disagreed. Organisational respondents who expressed a view were also likely to disagree with dynamic pricing.

Around 710 respondents explained their answer.

Reasons dynamic pricing for visitors is supported

The most frequent view at Question 6 was that tourists should pay more than local residents for ferry travel or, alternatively, that costs for islanders should be reduced. The need to manage demand (particularly at peak season) in view of limited capacity and a perception that the current service is designed / operated for the benefit of tourists rather than islanders were also cited, although some respondents who supported dynamic pricing added that they would not want to see higher prices discourage tourism.

Reasons dynamic pricing for visitors is not supported

The most frequent reason for not supporting dynamic pricing for visitors was a disagreement with the principle of dynamic pricing. There was also a view that what is required is more capacity not reduced demand, and concerns with respect to potentially negative impacts on the tourism sector and, by extension, on island economies. A specific concern was that, if already expensive fares for tourists are increased further, these visitors may decide not to travel. Highlighting the importance of tourism in the Northern Isles, a 'Public body' respondent reported that 2024 visitor spending was estimated at £78m for [Orkney](#) and £53.4m for [Shetland](#) while a 'Voluntary sector organisation' respondent noted that the [Shetland Tourism Strategy Refresh 2024-26](#) identifies 'cost of travel' as one of the main threats to tourism in Shetland. They saw dynamic pricing as likely to make this situation worse. As an example of the problems that might be caused, a 'Local authority or transport partnership' respondent noted that, as tour operators need to set prices a year or more in advance, unpredictable fare levels could undermine their ability to market Shetland effectively. They argued that any form of dynamic pricing that is introduced should be transparent, predictable and capped, with safeguards for residents and price certainty for tour operators.

An alternative perspective was that many tourists already book well in advance and dynamic pricing for visitors could provide an even greater incentive to do so.

Other reasons that dynamic pricing was not supported included:

- a risk of creating additional complexity around fares.
- a preference for a standard rate with an islander discount applied.
- unfairness, if being in a financial position to book early allows access to lower fares.
- potential costs for island residents if services procured from the mainland are subject to increased fares.

- the recent removal of peak rail fares across Scotland, with an associated argument that, for fairness, the same policy should also be adopted across the ferry sector.

Concerns relating to friends and family discounts

Both respondents who supported dynamic pricing and those who did not, raised issues around potential impacts on friends and family who, it was feared might be penalised by dynamic pricing. It was noted that family visitors who may be more likely to want to travel at popular times are already not eligible for discounted fares during school holidays.

Community voice, transparency and accountability

The consultation paper noted that Transport Scotland would like to ensure that there is meaningful engagement with the community on the operation of NIFS services. The NIFS operator and Transport Scotland regularly engage with the [Orkney External Transport Forum](#) and Shetland External Transport Forum.

Communication by the NIFS operator

Question 7: Would you like to see any changes in how the NIFS operator communicates with you, for example in relation to service changes or cancellations?

Responses to Question 7 by respondent type are set out in Table 12 below.

Table 12: Responses to Question 7 by respondent type

Type	Respondent group	Yes	No	Total
Individuals	NIFS network resident – Orkney	46	173	219
Individuals	% of NIFS network resident – Orkney	21%	79%	100%
Individuals	NIFS network resident – Shetland	152	483	635
Individuals	% of NIFS network resident – Shetland	24%	76%	100%
Individuals	All other individual respondents	16	56	72
Individuals	% of all other individual respondents	22%	78%	100%
Individuals	Total individuals answering	214	712	926
Individuals	% of individuals answering	23%	77%	100%
Organisations	Farming or land management organisation	0	1	1
Organisations	Freight company or representative body	0	1	1
Organisations	Local authority or transport partnership	0	0	0
Organisations	Other business or representative body	0	2	2
Organisations	Port/harbour authority	0	1	1
Organisations	Public body	0	0	0
Organisations	Trade union	0	0	0
Organisations	Voluntary sector organisation	1	1	2
Organisations	Total organisations answering	1	6	7
Organisations	% of organisations answering	14%	86%	100%
Total	Total respondents answering	215	718	933
Total	% of all respondents answering	23%	77%	100%

A majority of respondents – 77% of those answering the question - did not want to see any changes in how the NIFS operator communicates with them, while 23% would like to see changes in communication. There was a good level of agreement across the three groups of individual respondents, and although organisations that expressed a view were rather more likely to think that no change is required (86%), most did not answer the question.

Around 610 respondents explained their answer.

What works well in relation to service changes and cancellations

Reflecting the generally positive response to the closed question, respondents were most likely to comment that the NIFS operator communicates very well or well and that no changes to communication are required. Others suggested that how the operator communicates is OK or adequate.

Some respondents commented specifically on communication related to service changes and cancellations, referring to receiving texts or emails and/or seeing social media updates about service changes or cancellations. For example, an 'Individual' respondent referred to the text messaging, email and telephone calls all being handled exceptionally well in Shetland at the moment. A 'Local authority or transport partnership' respondent referred to booked passengers receiving updates in relation to any travel disruptions, whether this is for livestock or for passenger reservations. Other comments included that the NIFS operator's website is helpful and is generally kept updated.

What works less well in relation to service changes and cancellations

Some of those who would like to see changes in how the NIFS operator communicates with them made general comments that the current system does not work well or that improvements are required. For example, a 'Public body' respondent called for a clearer and more consistent approach to how the NIFS operator communicates service changes, disruptions and cancellations to customers. They went on to report that frustrations from NIFS service users often include important service updates being communicated late, limited information being provided on the reasons for disruptions / cancellations, and updates not going out through all available channels (text, email, app, social media and website).

A 'Local authority or transport partnership' respondent called for an approach based on clear, timely and accessible communication, with the next contract requiring the operator to adopt best-practice standards in communication. There was also a range of suggestions for specific improvements in relation to the current service, including:

- issuing earlier alerts and more frequent updates about service cancellations or changes
- providing an app, or sending alerts through existing apps
- contacting passengers by telephone to alert them to cancellations or changes
- keeping the notice boards outside terminals updated

- answering telephone call enquiries more quickly

There was also a suggestion for dedicated communication officers with local knowledge.

Event Feedback

Feedback provided by attendees at the Stromness community event included:

“Need better communication on reasons for disruption and timescales to resolve, plus website needs accurately updated to reflect disrupted sailing times.”

But also, in relation to the above:

“Disagree - website updated daily.”

Other communications related issues

Although most respondents focused on day-to-day communication issues, and in particular those relating to services changes or cancellations, a small number of respondents focused on broader issues around how the NIFS operator communicates with passengers, communities or other organisations.

For example, some ‘Individual’ respondents referred to the importance of the NIFS operator listening to, and communicating with, those who use the service, and especially islanders, before making big decisions. There was specific reference to more meaningful consultation and engagement on logistical issues relating to accommodation and booking and to engagement updates on long-term planning, not just immediate operational matters. These issues are returned to at the next question.

Two ‘Trade union’ respondents commented on communication between the NIFS operator and trade unions and the workforce, with one calling for a more formal consultation structure between the operator, Transport Scotland and the recognised trade unions organising the operator’s staff in shoreside and seafarer roles. They also called for a formal consultation structure with the recognised trade unions over the design of the NIFS4 contract.

Reflection of community views by transport forums

Question 8 – Do you think transport forums reflect community views effectively?

Responses to Question 8 by respondent type are set out in Table 13 below.

Table 13: Responses to Question 8 by respondent type

Type	Respondent group	Yes	No	Total
Individuals	NIFS network resident – Orkney	48	113	161
Individuals	% of NIFS network resident – Orkney	30%	70%	100%
Individuals	NIFS network resident – Shetland	128	379	507
Individuals	% of NIFS network resident – Shetland	25%	75%	100%
Individuals	All other individual respondents	18	33	51
Individuals	% of all other individual respondents	35%	65%	100%
Individuals	Total individuals answering	194	525	719
Individuals	% of individuals answering	27%	73%	100%
Organisations	Farming or land management organisation	0	0	0
Organisations	Freight company or representative body	1	0	1
Organisations	Local authority or transport partnership	0	2	2
Organisations	Other business or representative body	2	0	2
Organisations	Port/harbour authority	0	0	0
Organisations	Public body	0	1	1
Organisations	Trade union	0	1	1
Organisations	Voluntary sector organisation	0	1	1
Organisations	Total organisations answering	3	5	8
Organisations	% of organisations answering	38%	63%	100%
Total	Total respondents answering	197	530	727
Total	% of all respondents answering	27%	73%	100%

Percentages may not sum to 100% due to rounding.

A majority of respondents – 73% of those answering the question – did not think transport forums reflect community views effectively, while 27% thought that they do.

Shetland residents were slightly less likely to feel that community views are reflected compared to those from Orkney (at 25% and 30%) respectively.

Around 580 respondents explained their answer, albeit around one in three of those commenting simply noted that they either were not aware of the transport forums or that they did not know enough about the issue to comment. Residents of Orkney were more likely to say that they had not heard about the transport forums than residents of Shetland.

Transport forums do not reflect community views effectively

Those who commented that transport forums do not reflect community views effectively sometimes made the wider point that communities are not being listened to, with Shetland residents particularly likely to raise this concern. There were references to the current NIFS operator not listening to the views of island residents, especially in relation to shared cabins and pods, and it was suggested that for transport forums to be considered effective, the changes and improvements that communities wish to see should have been delivered.

A 'Local authority or transport partnership' respondent commented that while the Orkney and Shetland External Transport Forums play a role, there is room for improvement in community representation, while a 'Public body' respondent suggested that the two forums provide a strong basis to build upon, but that there is scope for improving engagement and reflecting community views.

For some respondents the concern was that the transport forums are not, or may not be, representative of communities. Associated concerns included that transport forum members may not be aware of wider community views, and there were also references to the forums not consulting directly with the communities they are supposed to represent. This was sometimes linked to a concern that members of groups such as transport forums tend to be those who are most vocal rather than those best placed to represent the position of the wider community.

A 'Public body' respondent called for representation to be widened to help ensure that a broader range of voices from the community are heard, and a 'Local authority or transport partnership' respondent suggested that the operator and Transport Scotland need to establish additional community groups, where operational issues or problems can be raised and discussed, during the contract period. There were also calls to:

- embed the role of the forums as part of the next NIFS contract, with a mandatory requirement for the NIFS operator to work with them.

- strengthen the External Transport Forums, including by requiring the operator to work with ZetTrans to ensure they are representative, effective and transparent.
- ensure specialist groups have routes for their insights to be reflected at the strategic level.

Transport forums do reflect community views effectively

‘Individual’ respondents who thought that transport forums reflect community views effectively sometimes simply noted that they hoped or expected that this was the case. However, as with those who did not think so, respondents sometimes noted that this does not necessarily mean that those representations are listened to or acted upon.

However, a small number of organisations were amongst those highlighting the strengths of the existing approach, including that both the Shetland External Transport Forum and the Orkney External Transport Forum are established platforms for dialogue between communities, stakeholders, the operator, and Transport Scotland. A ‘Local authority and transport partnership’ respondent commented that they allow communities, sectors, and interest groups to contribute openly, and they provide a channel through which feedback can be seen and understood by all. They suggested that the challenge is maintaining value by ensuring that all perspectives – from industry to community – are connected into a coherent overall picture.

Understanding connectivity needs and integration

Looking at how integration with onward and connecting travel can be promoted will enable Transport Scotland to provide opportunities for better connectivity and ferry user access via active travel, public transport, and other more sustainable transport modes.

Satisfaction with public transport to or from NIFS terminals

Question 9:

(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals?

(b) How satisfied are you with the active travel infrastructure (walking, wheeling and cycling) to or from the NIFS terminals?

Responses to Question 9(a) and (b) are set out in Charts 3 and 4 below with a full numerical breakdown by respondent type set out in Annex 2.

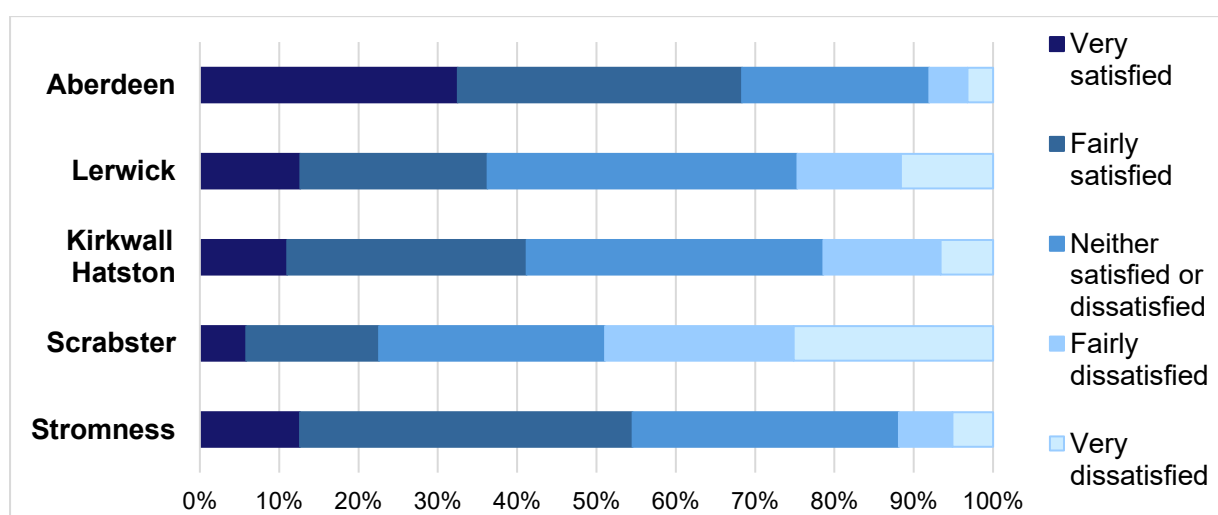


Chart 3: Satisfaction with public transport

Aberdeen had the highest level of satisfaction, with 69% of respondents either fairly or very satisfied with public transport to the terminal, and 8% either fairly or very dissatisfied. This was followed by Stromness where 55% of respondents were either fairly or very satisfied, and 12% either fairly or very dissatisfied. For Kirkwall Hatston, 41% of respondents were either very satisfied or fairly satisfied with public transport to the terminal, and 22% either dissatisfied or very dissatisfied. For Lerwick, 37%

were either fairly or very satisfied and 25% either fairly dissatisfied or very dissatisfied.

Highest levels of dissatisfaction were seen in relation to Scrabster, where 49% of respondents were fairly or very dissatisfied with public transport to and from the terminal, with 23% either fairly or very satisfied.

Satisfaction with active travel infrastructure to or from NIFS terminals

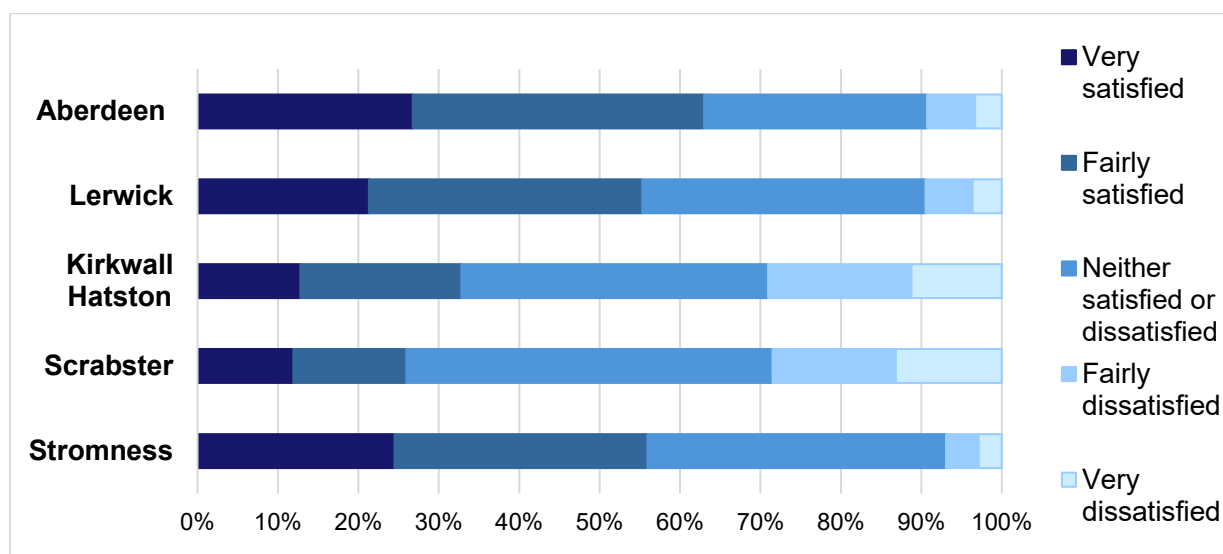


Chart 4: Satisfaction with active travel infrastructure

Aberdeen again had the highest level of satisfaction, with 63% of respondents either fairly or very satisfied with active travel infrastructure to the terminal, and 9% either fairly or very dissatisfied. This was followed by Stromness where 55% of respondents were either fairly or very satisfied, and 7% either fairly or very dissatisfied, and Lerwick, with 55% fairly or very satisfied, and 10% either fairly or very dissatisfied.

The highest levels of dissatisfaction were seen in relation to Kirkwall Hatston and Scrabster where 29% and 28% of respondents respectively were fairly or very dissatisfied with active travel infrastructure. Those who were fairly or very satisfied equated to 33% and 26% respectively.

Supporting integration with public transport

Question 10(a) – What do you think could be done by the NIFS ferry operator to support integration with public transport (bus/rail)?

Around 550 respondents answered Question 10(a).

A frequently made point, particularly among residents of Shetland, was that in general the integration between the ferries and public transport seems to be reasonable or works well and/or that they do not experience any problems themselves.

There were also a smaller number of respondents who reported that this is not an issue with which they are familiar as they do not need to use public transport, including because they chose to travel by car or live near to the ferry terminal they use.

There were also some references to integration with public transport not really being the NIFS operator's responsibility, with a 'Freight company or representative body' respondent commenting that integration with wider public transport is ultimately a matter for the Scottish Government and Transport Scotland, given their responsibility for national transport policy and funding. However, they did note that the NIFS operator can still play a supporting role by sharing timetable requirements, providing real-time data to bus and rail operators, and highlighting where connections are not working well.

General suggestions

The most frequently made suggestion was that the NIFS operator should engage with other relevant transport providers, such as train and bus companies, to align ferry and other public transport timetables. Orkney residents were particularly likely to see this as a priority.

A 'Voluntary sector organisation' respondent called for the NIFS operator to work with bus and rail operators to ensure that ferry, bus and train timetables are linked, so that using public transport to reach the ferry and then for onward travel is made easy, convenient, reliable and affordable. A 'Local authority or transport partnership' respondent was looking for the NIFS operator to maintain proactive liaison with ScotRail, bus operators, and transport authorities to review timetables, highlight conflicts, and seek solutions. Another suggested improving real-time journey planning tools.

Other timetabling suggestions made included:

- working with communities and visitor representatives to understand their needs and how timetables could be adjusted to make use of public transport more appealing and practical for communities and visitors.
- promotion of onwards connectivity at ferry terminals and on board the ferry, with ferry operator staff able to assist with onwards connectivity information.
- more daytime sailings, making it easier to connect with other public transport options.
- better alignment between inter-island ferries and the NIFS operator sailing times.
- ensuring there are always bus or train options to accommodate the needs of passengers before the first ferry and after the last ferry.
- building in reasonable flexibility to allow for unforeseen delays, so that customers are not left stranded.

Other suggestions for how the NIFS operator could support integration with public transport, or how better integration could be achieved included the introduction of smart ticketing and, in particular, allowing booking across multiple modes – ferry, bus and rail – on one platform. A ‘Public body’ suggested that this would support the uptake of sustainable travel options instead of private car use, and a ‘Local authority or transport partnership’ respondent called for the next NIFS contract to include clear requirements for the operator to work with national partners to develop integrated ticketing and journey planning solutions.

Respondents also made a number of suggestions around how terminal facilities could be improved to help support integration with public transport. These included more long-stay parking or park-and-ride facilities and considering the needs of older or disabled passengers. This latter issue is returned to at Question 11.

There were also calls from a ‘Trade union’ respondent to consider the needs of the crew and shoreside staff, including by providing secure and adequate facilities for crew changeovers and/or shore leave.

Route/location specific suggestions

In addition to a small number of general comments about more shuttle buses between ferry terminals and town centres or other transport hubs, respondents made a range of location specific suggestions, which are set out in turn below.

Shetland

- more local buses.
- introducing a shuttle bus from the terminal to Lerwick town centre and the bus station.
- better pedestrian access to the terminal.
- more long-stay parking at the terminal.

Orkney

- working with Orkney Islands Council to identify improvements to on island public transport connectivity and support their implementation.
- earlier ferry arrival time into Kirkwall, to allow for onward connections with inter island ferries.
- public transport options for passengers arriving on the late (11pm arrival) sailing.

Scrabster

- introducing a shuttle bus or establishing dedicated bus links between Scrabster and Thurso station.
- better bus and train connectivity from Scrabster to Inverness.

Aberdeen

- introducing a shuttle bus from the terminal to the train and bus stations or to the hospital.
- more direct bus services from the ferry terminal to the airport.
- better bus and rail onward connectivity in the early morning.
- improved pedestrian routes from the ferry terminal to the train and bus stations.

Event Feedback

Feedback from participants at the Stromness event included:

“Have a bus service from Scrabster to Thurso to connect with train times.”

“Bus right from ferry at Scrabster to Inverness. Electric bus. The train connection doesn't work as well.”

Supporting integration with active travel infrastructure

Question 10(b) – What do you think could be done by the NIFS ferry operator to support integration with active travel infrastructure (walking, wheeling and cycling)?

Around 320 respondents answered Question 10(b), albeit a small number to note that they only travel by car. Small numbers of respondents also commented on the barriers to active travel, including that it is not a practical option in remote rural areas or when people are travelling with significant luggage.

Most frequently, however, respondents suggested that the current situation seems to be good enough or that it is hard to see what more can be done to support integration with active travel infrastructure. Shetland residents were more likely to be of this view than Orkney residents.

As at the previous question, some respondents commented that in any case any issues were not or should not be for the NIFS operator to resolve. However, a ‘Local authority or transport partnership’ respondent commented that the NIFS operator can advocate for improvements with local authorities, harbour authorities and Transport Scotland, ensuring that walking, wheeling, and cycling infrastructure is embedded in wider active travel, port and terminal upgrades.

General suggestions

There was also a range of suggestions for practical changes or improvements that could be made. These included ensuring there are safe and adequate end-to-end active travel routes that link the ferry terminals with town/city centres/rail or bus hubs, both on the islands and also on the mainland. There was also reference to a general lack of active travel provision across ferry terminals, and it was suggested that it would be beneficial if funding were provided to support improvement projects going forward. Other suggestions included:

- ensuring there is adequate provision of parking at terminals and specifically disabled parking, so that passengers do not need to take their cars on the ferry and can instead walk/ wheel or cycle when they reach the isles, should they wish to

- producing and maintaining high-quality, accessible information on active travel routes at each terminal, available online and at point of travel
- incentivising people to use active travel mode, for example by waiving fares or providing a significant discount for foot passengers

In relation to walking specifically, suggestions included improving the standard of footpaths within port areas, for example with better/even surfaces, step free routes and improved lighting. Other walking-specific suggestions included:

- having enclosed walkways on piers.
- clear signposting of walkways.
- having more road crossing points.
- improving walking routes to town centres.

It was also suggested that there should be more and better wheelchair accessible routes.

Cycling-related suggestions included having better cycle lanes in and around terminals and:

- introducing better and secure bike shelters/parking at terminals.
- having designated onboard cycle storage areas.
- offloading cycles first.
- introducing cycle hire options at terminals.

There were also calls for cycles to be allowed on buses and trains, with a specific suggestion that the NIFS operator should work with bus and train operators to ensure that bicycles can be transported on services that take ferry passengers to the terminal.

Location specific suggestions

Location specific suggestions are set out in turn below.

Shetland

- upgrading of pavements and pedestrian crossings in Lerwick, including to make wheeling of suitcases easier.
- introducing cycle lanes in Lerwick.

Orkney

- better active travel options between Stromness and Kirkwall.

Scrabster

- a cycle path between Scrabster and Thurso.

A 'Port/harbour authority' respondent also called for investment in active travel routes to the Scrabster terminal. They commented that improved pedestrian and cycle and E-bike access, lighting, and storage would align with low-carbon goals and community accessibility objectives.

Aberdeen

- a better footpath between the ferry terminal and the bus and train stations/Union Square area.

Event Feedback

Feedback provided by attendees at the Stromness community event included:

“Walk from car park at Hatston port unsafe – truck, containers, cars moving etc very unsafe.”

Accessibility, environment and low carbon

The consultation paper noted that community feedback suggests that some equality groups face additional challenges when traveling on NIFS. Equality groups include those who have protected characteristics under the Equality Act 2010; age, gender reassignment, married or in a civil partnership, pregnant or maternity, disability, race (including colour, nationality, ethnic or national origin), religion or belief, sex or sexual orientation.

Improving accessibility

Question 11 – How do you think services could be improved in the next NIFS contract to help with accessibility throughout the ferry journey?

Around 460 respondents answered Question 11, with the most frequently made comment that the current services seem to work well or that the current situation is OK. Residents of Orkney were more likely to take this view than residents of Shetland. A 'Freight company or their representative body' respondent commented that the current operator does very well with what they have to work with, going on to note that continued modernisation of terminals and replacement vessels will make a significant difference.

Moving forward, a 'Local authority and transport partnership' respondent was amongst those highlighting the importance of ensuring that vessels and terminals have accessibility as a priority and are fully compliant with the Equality Act 2010, while a 'Public body' respondent noted that they would be supportive of the introduction of an Accessibility Standard, as proposed by Transport Scotland within the 'Islands Connectivity Plan: Strategic Approach'.

A 'Local authority or transport partnership' respondent suggested that any new NIFS contract should ensure all passengers are treated equally and with respect and include a commitment to making any reasonable adjustments to the ferries and ferry terminals. There was also reference to reaching out to equality groups to understand the challenges they face and hearing the ideas they have to help resolve these issues. A 'Trade union' respondent commented that the establishment of a working group comprised of the operator, the recognised unions and the Mobility and Access Committee for Scotland would also be in line with the Islands Connectivity Plan's strategic approach.

'Individual' respondents highlighted a number of current issues or made specific suggestions for how services could be improved going forward. These are set out in turn below.

Embarkation and disembarkation

Comments and suggestions in relation to making the embarkation and disembarkation process more accessible included:

- having more, bigger and better lifts on vessels, and especially having a lift to the lower car deck.
- prioritising the use of lifts for those who need them.
- ensuring that the onboard parking for disabled passengers allows for easy access to the lifts, and leaving more space between vehicles.
- priority boarding for passengers who need to use the lift due to disabilities, and introducing quiet times for boarding for those travelling with dementia for example.

There were also calls for the NIFS operator to work collaboratively with Lerwick Port Authority, Orkney Harbours, and Aberdeen Harbour Board to ensure:

- continuous step-free access, accessible waiting areas, and suitable toilets/changing facilities.
- boarding and disembarkation processes that are safe, dignified, and do not disadvantage cyclists and passengers with mobility aids, prams, or luggage.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

"Lifts are not big enough for people in power wheelchairs or bigger wheelchairs."

"Better signage and visual, like raised bumps or yellow lines showing the way to the ship."

Cabins and pods

Respondents were most likely to raise issues relating to the onboard accommodation including that the pods are not suitable for disabled, older or pregnant passengers, and those travelling with children. There were calls for:

- an increased supply of accessible cabins.
- those cabins having better space and general accessibility standards.
- accessible cabins to be reserved for disabled passengers only.
- secure, female only sleeping spaces.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

“Need more accessible cabins – it is an all-inclusive service but that does not let it to be accessible for ppl who need it the most (e.g. wheelchair users).”

“Only four accessible cabins which makes it difficult to book – needs to be booked well in advance.”

Vessel design and facilities

Other vessel design or facilities related suggestions included:

- improving handrails, for example having more rails that are connected and without gaps in between.
- corridors and doorways being wider.
- doors being easier to open, and specifically less heavy.
- wheelchair friendly spaces and, specifically, accessible tables and more space between tables in the cafeteria.
- quiet spaces and facilities/assistance for people with hidden disabilities.
- more accessible information display screens and BSL interpretation of announcements.

A ‘Local authority or transport partnership’ respondent made suggestions relating to collaborative work with Transport Scotland and CMAL including to:

- ensure future vessels are designed inclusively from the outset.
- collect passenger feedback and feed evidence back to CMAL and the Scottish Government to shape vessel procurement so that accessibility lessons are embedded in newbuilds.
- use available flexibility (within the contract) to make modest modifications and retrofits to improve accessibility.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

“Changing places – ceiling is not high enough for power wheelchair – works for other wheelchairs but not all.”

“In the eating area no place for ppl with wheelchair to sit without getting in the way of others.”

“Thresholds are big – not accessible for people in a wheelchair.”

“Using screens to display the ship announcements for those with hearing loss.”

“Better info/access to accessibility facilities as passengers are getting on board? (at reception).”

Service-related improvements

Respondents noted the importance of staff being trained on equality and diversity issues, including in relation to all disabilities. There was an associated suggestion that staff should be encouraged to take a proactive approach, offering help rather than waiting to be asked

Other comments focused primarily on information provision and the booking system, and included that:

- websites, apps, and printed materials should be fully accessible (screen-reader compatibility, plain language, multiple languages, large-print formats).
- there should be improved clarity around the availability and booking of accessible cabins and seating.
- an opportunity to flag additional needs or request assistance should be provided during the booking process.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

“Can an easy read leaflet and an accessible app be created so can get information about using ferry in an easy way?”

Feedback provided by attendees at the Stromness event included:

“No one on the boat to ask for help on the overnight sail.”

Reducing overall environmental impact

Question 12 – Do you have any suggestions on how NIFS can reduce their overall environmental impact? You may wish to refer to the following environmental factors identified in the Environmental Assessment (Scotland) Act 2005: air quality; population and human health; noise; material assets; water environment; biodiversity; cultural heritage.

Around 470 respondents answered Question 12.

A frequently made point, particularly among Shetland residents, was that the approach being taken currently seems sufficient or OK. Some respondents commented that either this is not an issue that they care about or that it is not a priority for them.

However, other respondents noted their commitment to reducing the overall environmental impact of NIFS. For example, a ‘Port/harbour authority’ respondent commented that they are committed to supporting the transition to lower-carbon operations, including facilitating shore power, improved waste management, and vessel efficiency upgrades.

A ‘Trade union’ respondent suggested that consideration should be given to the appointment of ‘green reps’ to work with managers to increase recycling rates, water and energy conservation and other environmental impacts from NIFS contracted operations. ‘Individual’ respondents also made specific suggestions. These are set out in turn below.

Vessel-related suggestions

The most frequently raised issue was that ferry services should be moving away from the use of diesel, and that there should be a focus on the use of alternative fuels, and in particular electrification and hybrid designs. There were also references to engines being upgraded, but also to not using untried technologies.

A ‘Local authority or transport partnership’ respondent commented that, while responsibility for vessel design and propulsion lies with the Scottish Government and CMAL, any exploration of alternative fuels and hybrid propulsion should be done in close consultation with the ports to ensure all needs are met.

Other vessel-related comments, particularly from Shetland residents, included that having a new or newer fleet will be of benefit and that there should be a focus on ensuring that the next generation of ferries are as low environmental impact as possible. This was sometimes linked to having more efficient vessels, or to suggestions that:

- alternative hull designs should be explored.
- vessels should be either bigger or smaller and faster.

Linked to the suggestion of bigger ferries was the suggestion that having more cabins or more shared cabins would encourage more people to use the ferries and, by extension, would reduce the use of air travel.

In relation to the fleet in general, it was noted that regular servicing and maintenance should help optimise efficiency, including around minimising environmental impact.

Event Feedback

Feedback provided by attendees at the Kirkwall community event included:

“Make sure you have anticipated that you will have low carbon fuel/ferries during the life of the contract.”

“Need to operate fuel efficient ferries - especially on the Scrabster/Stromness route - Pentland ferries run catamarans very successfully...”

Feedback provided by attendees at the Stromness event included:

“Appreciate lower carbon use through boat going a bit slower. Leaving as soon as loaded makes this possible.”

“Change to shore power helpful.”

Operation-related suggestions

The other frequently made suggestion was about the use of mains electricity when vessels are berthed, with calls for vessels to be connected to shore power while in port. There was also reference to delivering shore power in a sustainable and planned manner, with the full engagement of the recognised trade unions.

Other operation-related suggestions included:

- reducing speed, which was connected to improved fuel efficiency and reduced emissions.

- improving recycling and waste management processes, including onboard recycling and the use of recycled and recyclable materials where feasible.
- noise and light management, including quiet operating procedures in sensitive areas and reducing unnecessary lighting at night.
- encouraging freight consolidation.
- environmental culture and reporting, including training staff in best practice and monitoring environmental performance.

The importance of protecting biodiversity through careful planning of port development and operations was also highlighted. In terms of matters that are Scottish Government and CMAL responsibilities, there was reference to liaison with the operator in relation to: procurement of vessels designed to meet future climate and air quality standards; decisions on propulsion technologies; provision of shore power and supporting grid capacity; waste reception and recycling facilities at terminals; and port estate design.

Freight

The Cabinet Secretary for Transport has announced that procurement is progressing for two new freight flex vessels to serve the Aberdeen to Kirkwall/Lerwick route. A 'freight flex' option will bring improved freight capacity, higher operating speed and the flexibility to provide space for up to 200 passengers to travel at peak times.

Work with hauliers and businesses to plan commercial traffic volumes

Question 13 – How could the NIFS contract operator improve how it works with hauliers and businesses to more effectively plan commercial traffic volumes?

Around 300 respondents answered Question 13, although a number to simply note that they did not know how the NIFS contract operator could improve how it works with hauliers and businesses to more effectively plan commercial traffic volumes.

Overall, the most frequently made comment was that the focus should be on keeping freight off passenger vessels and sailings. This was a particular concern for Shetland residents. Reflecting issues raised at the next question (in relation to managing or reducing demand on routes which experience high freight volumes), respondents pointed to the need for extra freight services or larger vessels.

A number of organisational respondents provided more detailed comments on this issue, including noting the importance of freight services to the local economy and to certain key industries in particular. For example, there was reference to the growing scale of freight and personnel requirements for renewable energy developments and the importance of seafood exports to the economy. It was also noted that freight services carry vital supplies, such as food and fuel, to the islands.

A 'Local authority or transport partnership' respondent suggested that the NIFS4 contract should secure freight's place at the heart of lifeline services. They referred to protecting the collaborative approach already established, ensuring transparent allocation, and planning proactively for future capacity through freight flex vessels and supporting infrastructure.

Respondents also commented on current arrangements, both in terms of the day-to-day management of capacity and joint working and consultation arrangements.

Event Feedback

Feedback provided by attendees at the Stromness community event included:

“Difficulties for managing large volumes of freight - particularly for Shetland which impacts on Orkney service.”

Feedback from the Lerwick included:

“Freight takes priority over passengers.”

“Hire extra freight boats during summer.”

Management of current capacity

There were mixed reports regarding how well current capacity is managed, with a ‘Freight company or representative body’ respondent noting that experience varies depending on a number of factors, including what freight commodity is being moved (dangerous goods or not), how often the individual business uses the service, and how long the vehicle and driver will need to remain on the island destination.

There was also reference to hauliers in Orkney having previously raised concerns that the freight from Orkney bound for Aberdeen is prioritised below freight from Shetland. The ‘Local authority or transport partnership’ respondent highlighting this issue went on to comment that previous contracts have allocated a freight allowance for Shetland but that, with no similar arrangement for Orkney, live fish from Orkney can be removed from the reservation list in favour of live fish from Shetland for example. They also reported that hauliers have experienced problems with receiving empty trailers back from Aberdeen due to capacity issues on board the vessels.

In terms of how current capacity should be managed going forward, suggestions included:

- having a member of staff dedicated specifically to dealing with freight issues, which could help address any disparity in service and support greater collaboration.
- providing clear and timely channels for hauliers to raise issues and receive responses.
- improving coordination with hauliers through forecasting tools and reservation data sharing.
- developing a freight prioritisation framework during capacity-constrained periods.

- deploying larger vessels where demand justifies it.
- making more efficient or dynamic use of deck space on board to maximise available capacity.
- making certain that sector empty trailers and tankers are returned to base expeditiously to ensure seamless flow of traffic.

In terms of the NIFS4 contract, there was reference to:

- retaining the freight link between Shetland/Orkney/Shetland.
- the freight from both Orkney and Shetland being treated in the same manner and any allocation in the Contract being the same for both islands.
- the current contract requirement to retain 18 spaces for time-sensitive traffic (seafood south from the northern isles) continuing to feature.

Joint working and consultation

Other comments focused on how the NIFS4 operator can work with hauliers and business in relation to overall planning of commercial traffic volumes.

A 'Freight operator or their representative bodies' respondent was amongst those commenting that the current operator does a very good job in relation to working with hauliers and businesses to plan commercial traffic volumes. Another commented that, while there is always scope for improvement, there are existing mechanisms through which trade bodies, hauliers, the ferry operator and Transport Scotland can discuss important issues. They went on to note the importance of this constructive dialogue continuing under NIFS4.

In terms of specific areas of joint working where there could be potential for improvement (whether through NIFS4 or otherwise), there was reference to:

- a closer working relationship between the operator and ports helping to optimise scheduling and berth management.
- encouraging the sharing of information on current and future industry activity and anticipated freight volumes over the short, medium and long terms.

There was also a call for the perspectives of industry or individual exporters to be central to Transport Scotland's considerations in designing the next contract, with specific suggestions including that Transport Scotland should establish a formal mechanism for coordination with the Net-Zero Directorates, enabling comprehensive policy planning that incorporates the needs of projects, such as onshore and offshore wind farms.

Managing demand on routes with high freight volumes

Question 14 – Do you have any suggestions to better manage or reduce the demand on routes which experience high freight volumes in the interim or longer term?

Around 360 respondents answered Question 14, albeit that the issues raised tended to echo those from the previous question. The more frequently made comments included that extra freight services should be provided, especially during peak periods or that larger vessels are required.

Reflecting this focus, a ‘Freight company or representative body’ respondent questioned the reference to reducing demand. They went on to note that the transport of freight is a lifeline service and that the focus needs to be on meeting that demand, recognising that future demands will likely increase. They made specific reference to Shetland entering a new era of industrial development. A ‘Public body’ respondent commented that, although many of the major development projects in the Northern Isles will utilise charter vessels due to their scale, the accumulative impact of the additional freight requirements is nevertheless expected to place further demand on freight capacity.

Current arrangements

A number of organisational respondents made specific suggestions relating to managing freight volumes in the shorter term (essentially prior to the deployment of new vessels – discussed further below). These included considering whether additional services need to be added to the schedule and specifically:

- contracting additional freight tonnage for the Aberdeen-Lerwick route.
- introducing an ‘out of hours’ service on the Stromness route.

Other suggestions included:

- using data analysis and forecasting techniques to predict peak demand periods and adjust ferry schedules accordingly.
- considering off-peak freight pricing incentives to spread demand.
- exploring cooperative logistics models to consolidate loads across smaller hauliers.

As at the previous question, there were calls for collaboration, including working with the logistics sector, freight companies, industry associations, and other stakeholders to develop and implement strategies for managing demand on ferry routes.

Longer term and Freight Flex

There was strong support for the introduction of additional freight and passenger capacity when the two Freight Flex vessels come into service in 2029. Associated comments included that their introduction represents a significant opportunity to build on the strong joint-working foundation and that current operator has with freight users, with other points including that the dual capability they offer will or should:

- provide seasonal flexibility by increasing capacity to meet demand, whether it be from freight, resident travel or from visitors/ tourists, during peak points.
- strengthen resilience during refits and disruption.

However, it was seen as vital that the “flex” is managed transparently and fairly, so that freight and passenger needs are given equal weight and businesses and industries have confidence that their needs will remain central in how the new vessels are deployed.

Finally, a ‘Public body’ respondent noted their understanding that no analysis has been carried out to determine that the new freight flex vessels are compatible with the infrastructure at Hatston. They suggested that it is important that this is carried out in simulation, consistent with the testing at Aberdeen Harbour.

Event Feedback

Feedback provided by attendees at the Lerwick community event included:

“Hopefully this new freight ship due in 2029 will help with current bottlenecks at certain times of year.”

“The flexibility promised with the proposed freight vessels might not be as flexible as the public envisages - we were told at a previous exhibition that more crew are required if 12+ passengers are carried - at what point will this be activated.”

Other recommendations for improving freight services

Question 15 – Do you have any additional comments or recommendations regarding how to improve ferry freight services?

Around 170 respondents answered Question 15, with the most frequently made points again that extra freight services should be provided, especially during peak periods or that larger vessels are required.

Additional issues raised, primarily by one of the small number of organisational respondents answering this question, are set out in turn below.

Impact of constrained infrastructure

It was reported that the current transport infrastructure of the Northern Isles is already under strain, with an ‘Other business or representative body’ respondent for the renewable energy industry commenting that their members are reporting:

- activity being forced to bypass ports like Lerwick and sail to mainland UK or European ports instead; they noted that this redirection is not only inefficient but also limits opportunities for the local supply chain.
- passenger constraints, with many regularly experiencing difficulties when booking travel for essential workers; they went on to note that shortfall leads to significant project delays, increased costs and presents a barrier to those seeking employment opportunities in the Northern Isles.

This respondent was one of those calling for additional capacity to meet demand and noting that key industries, such as renewable energy, cannot wait until the expected new cargo vessels are brought into service.

Similarly, a ‘Local authority or transport partnership’ respondent highlighted a number of large-scale projects being taken forward on Orkney, such as the SSEN power station, proposed Scapa Deep Water Quay, pier infrastructure upgrades and wind turbine projects. They also noted that it is key that the ferry operator can adapt by providing additional frequency across the networks, including so as not to constrain tourism and choice for the community.

There was also a concern that building new vessels to fit a particular port is a flawed policy and there was a call to investigate requirements for likely infrastructure needs,

together with the relevant port authorities and others, to ensure the service supports the isles as it should.

Freight charging processes

Question 16 – How could the current charging processes on freight for NIFS services be enhanced or changed in the future?

Around 130 respondents answered Question 16. The most frequent comment was that freight charges should be lower, with a number of 'Individual' respondents commenting on the impact of freight charges on the cost of goods and services on which they rely.

A small number of organisational respondents noted that freight charging on NIFS services is a matter of real importance to the industries and economy of the islands, and there were calls for the Scottish Government to complete the review of freight fares. It was reported that industry has lived with the threat of reviewing freight fares for several years and that this causes anxiety for isles' businesses, a loss of confidence for the future and a curtailment of investment. If the intention is to review fares, it was suggested that industry involvement will be critical and that the focus should be on:

- providing businesses with the clarity which is required to operate with confidence, profitability and efficiency.
- ensuring there is transparency, fairness and flexibility.
- the wider operating environment for islands businesses over the past few years, which has seen them endure increased costs amid inflationary pressures.

The 'Public body' respondent making this last point commented that transport is a critical economic enabler and this is especially true of the NIFS services. They cautioned against any measures that would increase the cost of doing business on the islands.

The cost of working and doing business across Orkney and Shetland was a particular concern for a 'Farming or land management organisation' respondent speaking for crofters and farmers. They reported that their members find current freight costs to be excessive and unsustainable, placing considerable financial strain on their businesses. They went on to note that the ferries are a lifeline service for farmers and crofters in Orkney and Shetland, enabling them to supply high-quality produce to the UK food industry but that, unfortunately, this comes at a significant cost. They called

on Transport Scotland to reconsider the current concession and pricing structure to ensure that island crofters and farmers are treated on par with their mainland counterparts by lightening the financial strain set by freight costs.

General

Priorities for the next NIFS contract

**Question 17 – Looking at the list below, what would you consider to be the top 3 priorities for the next NIFS contract?
If ‘other’, please provide details**

Respondents were invited to select (up to) three ranked priorities for the next NIFS contract. The choices offered in the consultation paper were:

- reliability
- punctuality
- quality of on-board catering
- quality of on-board accommodation
- ease of changing a booking
- ease of booking a ticket
- customer service by staff on board
- customer service by staff in ferry terminals
- signage at and enroute to ferry terminals
- other

The number of respondents allocating their first second and third priorities to each criterion are shown in Chart 5 below, with a full numerical breakdown by respondent type set out in Annex 2. The chart shows the priorities of Orkney and Shetland respondents separately and then the totals for all respondents (including all individual respondents and those organisations who answered this question).

Please note that to make the priorities of Orkney and Shetland easier to compare, the scale of vertical axis on the Orkney chart has been increased so that the highest priority bar is of equivalent size to that for Shetland.

Taking all respondents together, reliability and quality of accommodation were identified as the top priorities for the next NIFS contract, albeit with slightly more respondents ranking reliability as the top priority.

When the priorities of Orkney and Shetland residents are considered separately, reliability was the top priority for those on Orkney with quality of on-board accommodation in second place. These priorities were reversed for Shetland residents, who ranked quality of accommodation as most important. Ease of booking

a ticket was the third most frequent choice for Shetland residents, while those from Orkney placed a greater emphasis on punctuality.

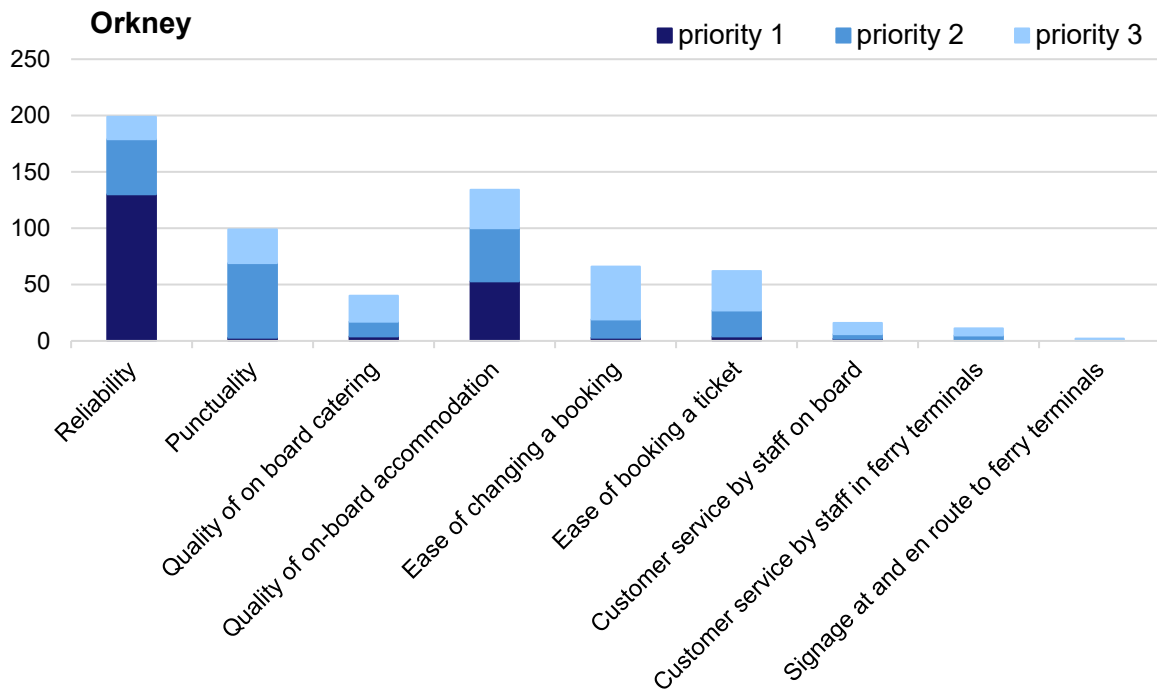


Chart 5: Top 3 priorities for the next NIFS contract – Orkney

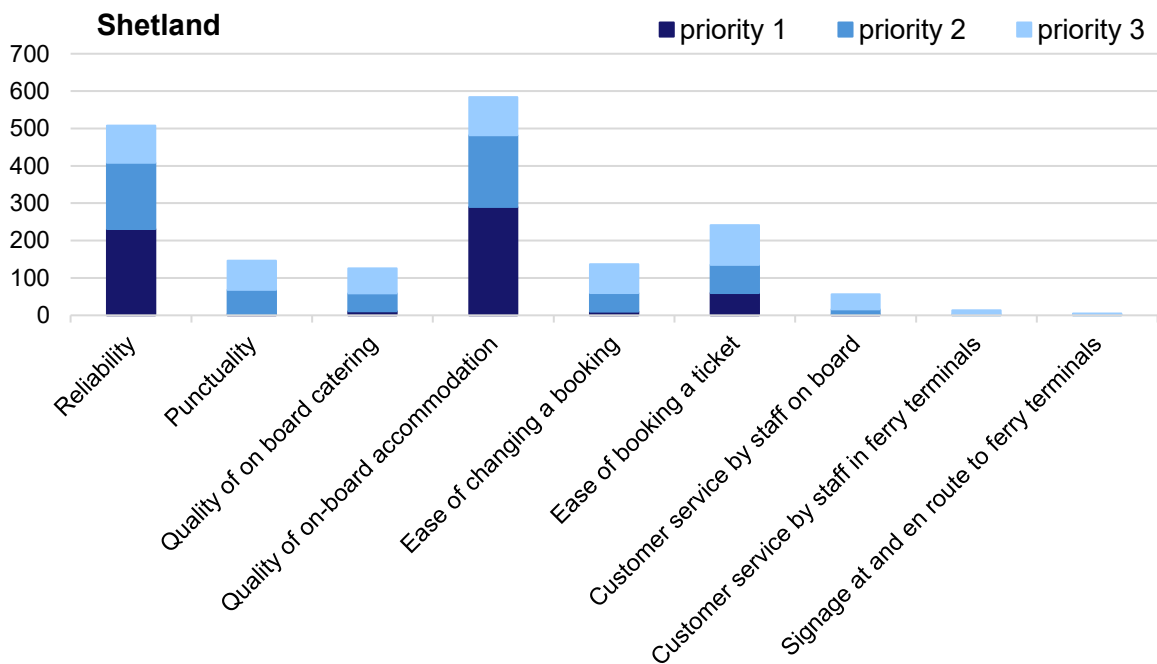


Chart 6: Top 3 priorities for the next NIFS contract - Shetland

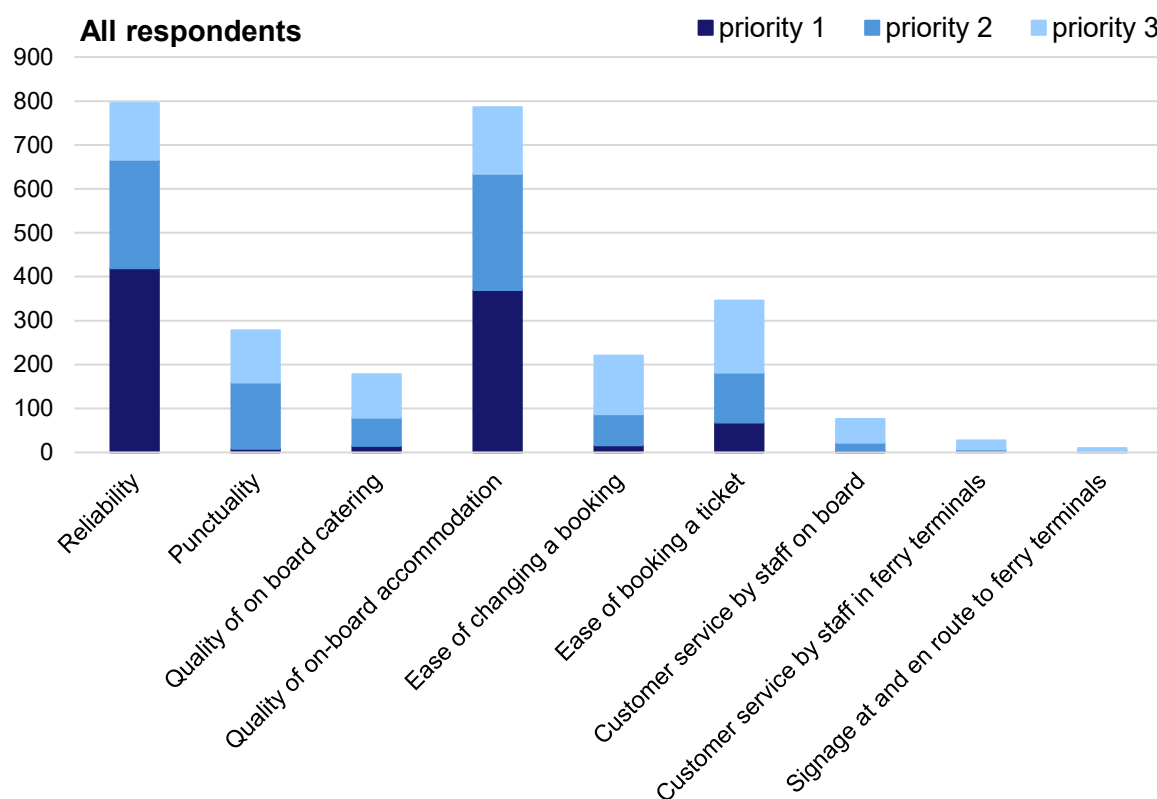


Chart 7: Top 3 priorities for the next NIFS contract - All Respondents

With respect to ‘other’ priorities identified by respondents, (A total of 331 respondents selected ‘other’ as one of their three priorities. Details are set out in Annex 2), those suggested most often were:

- quantity of accommodation – more capacity in general, and specifically more cabin space, more space to lie flat, bringing back shared cabins, more vehicle space and the ability to book both a car and a cabin on the same service.
- price in general and the price of cabins in particular, with a view that affordability should be a priority in its own right.
- prioritising the needs of islanders and pricing specifically for islanders.

Capacity issues tended to be raised more often by Shetland based respondents than those from Orkney. A ‘Local authority or transport partnership respondent’ argued that, as overnight travel is unavoidable for Shetland residents, fair access to the available accommodation is important to maintain community confidence.

There was also a view that all the priorities listed in the consultation paper are important.

Other priorities suggested by fewer respondents included:

- additional freight capacity
- improved integration with mainland transport networks
- more pet-friendly cabins
- more sailings and specifically daytime sailings
- improved booking and communication systems

Other suggestions for improving NIFS services

Question 18 – Do you have any other suggestions on how the NIFS services could be improved?

Around 710 respondents answered Question 18, although most frequently to reiterate points made at earlier questions concerning the type of accommodation that should (or should not) be provided, a desire for more cabin space and calls to bring back shared cabins. These comments were more likely to be made by Shetland residents than those from Orkney. Other suggestions included that NIFS services could be improved by:

- increasing capacity by using larger vessels or having more sailings and, specifically, scheduling additional services at peak times.
- offering more affordable fares.
- having better or less expensive on-board catering.
- giving islanders priority in the booking process, including priority access to cabins.

A general point with respect to the booking system was that it should be possible to make bookings further in advance than has been possible recently.

Onboard facilities

Comments related to on-board catering included requests for: better food and coffee; more vegetarian food and options for those with special dietary requirements; more seating and tables in the restaurant; longer café opening hours; more use of local produce; and bringing back the islander discount for on-board catering. It was also suggested that there should be a larger bar area, that both bars should be opened, or in contrast, that one bar should be closed and the additional space used to provide horizontal sleeping options.

Other suggestions relating to on-board facilities included calls for:

- improved internet/Wi-Fi connectivity.
- more pet-friendly cabins and other pet-friendly spaces on vessels and improved kennel facilities.
- more things to do, particularly in terms of activities for children.

However, it was also reported that the cinema is too far forward in the boat (and hence subject to too much motion when sailing) and is little used.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

“Food options – little for gluten free – and very pricey – more options please for gluten intolerance.”

“Dining area cordoned off for tour trips – I have not been able to find a table when ones are free but cordoned off for tourists.”

“The 30% islander discount in the restaurant bar has been removed, so I have stopped using them.”

Routes and timetables

A small number of ‘Individual’ respondents made points concerning the Aberdeen-Lerwick services calling at Kirkwall. Some – all residents of Shetland – suggested that fewer or no boats should call at Kirkwall. They noted that Orkney has alternative ferry routes to the mainland whereas Shetland only has one, and that not calling at Kirkwall would both reduce sailing time and improve capacity issues for those travelling to Lerwick.

In contrast a small number of others (largely although not exclusively Orkney residents) suggested that more or all Aberdeen-Lerwick services should call at Kirkwall.

Other proposals included:

- a separate Kirkwall-Lerwick service.
- earlier arrival and departure times at Kirkwall.
- additional routes, for example Lerwick-Scrabster or Stromness-Scrabster-Aberdeen.

With respect to the Scrabster-Stromness route it was suggested that later departures from both Stromness and Scrabster would be welcome, as would running an 11a.m. service from Stromness-Scrabster throughout the year and not just in the summer.

An 'Other business or representative body' respondent highlighted the importance of this route as lifeline service for mainland communities, arguing that it must also be shaped for these communities and not just those of the islands.

While there were calls for more sailings on some routes and additional services on others, a 'Trade union' respondent observed that the next NIFS contract must ensure that schedules, turnaround times, and crewing levels are determined primarily by safety and fatigue-management principles rather than commercial pressures.

Event Feedback

Feedback provided by attendees at the Lerwick event included:

"If the ferries did not sail into Orkney so many times, this would free up cabin space and car space. Orkney is well served for routes to the mainland. It seems to us that Orkney is prioritised."

"Don't call at Orkney when sailing from Shetland – they have other services."

Feedback from the event in Kirkwall included:

"Boarding and disembarking times in Orkney (on Aberdeen route) not good for families with young children. Also doesn't work well with connections to other islands in Orkney."

Feedback from Stromness included:

"Reinstate the 1100 Stromness-Scrabster sailing and the 1315 Scrabster sailing in the winter."

"1100 sailing is really missed and has negative impact for islanders and harder for accessibility to get to ferry."

Reliability / Resilience

As indicated by responses at Question 17, reliability was seen as an important issue by many respondents, with one 'Local authority or transport partnership' respondent describing reliability as underpinning all the other aspects of a lifeline service.

While there were relatively few comments on current reliability levels, some respondents did highlight issues relating to resilience and future-proofing including calls for:

- planning for fleet and infrastructure renewal, environmental responsibility, and long-term sustainability.
- a commitment to regular stakeholder engagement and joint planning sessions, particularly when planning new vessels.
- improved consultation with the recognised trade unions, including over vessel design and commercial crewing levels.

Appreciation for current service

Finally, it should be noted that some respondents expressed a view that, apart from capacity issues, the service currently provided is good and, in particular, that the current operator's staff do a great job. There was also appreciation of the sponsorship that the operator provides – for example to local charities and sports groups.

Annex 1: Organisations responding to the consultation

Farming or land management organisation (n=2)

- NFU Scotland's Shetland and Orkney Regions
- Quendale Farm Ltd

Freight company or representative body (n=3)

- ANM Group Ltd
- Logistics UK
- Stewart Group

Local Authority or Transport Partnership (n=3)

- Orkney Islands Council
- The Highlands and Islands Transport Partnership (HITRANS)
- ZetTrans

Other business or representative body (n=5)

- Caithness Chamber of Commerce
- D&H Glue
- Personalised Orkney Tours
- Purple Plover Consulting Ltd
- Scottish Renewables

Port or harbour authority (n=2)

- Lerwick Port Authority
- Scrabster Harbour Trust

Public Body (n=2)

- Highlands and Islands Enterprise (HIE)
- Visit Scotland

Trade Union (n=2)

- National Union of Rail, Maritime & Transport Workers (RMT)
- Nautilus International

Voluntary sector organisation (n=3)

- National Trust for Scotland
- Netball Orkney
- Shetland Girl's and Women's FC

Feedback received in other formats (not included in organisation totals)

- Mobility and Access Committee for Scotland (meeting minute)
- Shetland Youth Voice (Transport summit report - January 2025)

Annex 2: Data supporting charts used in the report

How frequently do you use NIFS services?

Respondent group	5-7 times a week	2-4 times a week	Once a week	Once every other week	Once a month	Seasonal (Summer period)	Occasionally	Other	Total
NIFS network resident – Orkney	1	1	2	9	55	11	153	20	252
Percentage	0%	0%	1%	4%	22%	4%	61%	8%	No Data
NIFS network resident – Shetland	1	8	3	6	90	24	455	133	720
Percentage	0%	1%	0%	1%	13%	3%	63%	18%	No Data
All other individual respondents	1	0	0	2	5	9	55	22	94
Percentage	1%	0%	0%	2%	5%	10%	59%	23%	No Data
Total individuals answering	3	9	5	17	150	44	663	175	1066
% of individuals answering	0%	1%	0%	2%	14%	4%	62%	16%	No Data

How old are you?

Respondent group	16 to 18	19 to 21	22 to 34	35 to 44	45 to 54	55 to 64	65 to 74 over	75 or over	Prefer not to say	Total
NIFS network resident – Orkney	1	0	25	47	56	65	47	11	5	257
Percentage	0%	0%	10%	18%	22%	25%	18%	4%	2%	No data
NIFS network resident – Shetland	4	8	91	126	156	186	110	41	12	734
Percentage	1%	1%	12%	17%	21%	25%	15%	6%	2%	No Data
All other individual respondents	0	0	13	20	19	18	23	5	1	99
Percentage	0%	0%	13%	20%	19%	18%	23%	5%	1%	No Data
Total individuals answering	5	8	129	193	231	269	180	57	18	1090
% of individuals answering	0%	1%	12%	18%	21%	25%	17%	5%	2%	No Data

Question 9(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals? (i) Aberdeen

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	65	53	30	5	4	157	52	21	230
Individuals	Percentage	41%	34%	19%	3%	3%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	178	212	149	29	19	587	62	37	686
Individuals	Percentage	30%	36%	25%	5%	3%	No Data	0	0	No Data
Individuals	All other individual respondents	20	25	12	5	3	65	9	13	87
Individuals	Percentage	31%	38%	18%	8%	5%	No Data	0	0	No Data
Individuals	Total individuals answering	263	290	191	39	26	809	123	71	1003
Individuals	% of individuals answering	33%	36%	24%	5%	3%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	1	0	0	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	0	0	0	0	2	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	1	1	0	0	2	0	0	2
Organisations	Total organisations answering	0	1	3	0	0	4	1	2	7
Organisations	% of organisations answering	0%	25%	75%	0%	0%	No Data	0	0	No Data
Total	All respondents answering	263	291	194	39	26	813	124	73	1010
Total	% of all respondents answering	32%	36%	24%	5%	3%	No Data	0	0	No Data

Question 9(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals? (ii) Lerwick

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	4	9	20	1	3	37	78	88	203
Individuals	Percentage	11%	24%	54%	3%	8%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	60	109	188	67	58	482	109	82	673
Individuals	Percentage	12%	23%	39%	14%	12%	No Data	0	0	No Data
Individuals	All other individual respondents	8	16	14	6	5	49	20	15	84
Individuals	Percentage	16%	33%	29%	12%	10%	No Data	0	0	No Data
Individuals	Total individuals answering	72	134	222	74	66	568	207	185	960
Individuals	% of individuals answering	13%	24%	39%	13%	12%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	1	0	0	0	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	0	0	0	1	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	0	0	1	0	1	0	1	2
Organisations	Total organisations answering	0	1	1	1	0	3	2	2	7
Organisations	% of organisations answering	0%	33%	33%	33%	0%	No Data	0	0	No Data
Total	All respondents answering	72	135	223	75	66	571	209	187	967
Total	% of all respondents answering	13%	24%	39%	13%	12%	No Data	0	0	No Data

Question 9(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals? (iii) Kirkwall Hatston

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	17	50	44	22	10	143	58	27	228
Individuals	Percentage	12%	35%	31%	15%	7%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	18	40	69	22	8	157	210	234	601
Individuals	Percentage	11%	25%	44%	14%	5%	No Data	0	0	No Data
Individuals	All other individual respondents		6	6	3	3	18	27	31	76
Individuals	Percentage	0%	33%	33%	17%	17%	No Data	0	0	No Data
Individuals	Total individuals answering	35	96	119	47	21	318	295	292	905
Individuals	% of individuals answering	11%	30%	37%	15%	7%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	1	0	0	0	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	0	0	0	1	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	1	0	0	0	1	2	0	0	2
Organisations	Total organisations answering	1	1	1	0	1	4	2	1	7
Organisations	% of organisations answering	25%	25%	25%	0%	25%	No Data	0	0	No Data
Total	All respondents answering	36	97	120	47	22	322	297	293	912
Total	% of all respondents answering	11%	30%	37%	15%	7%	No Data	0	0	No Data

Question 9(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals? (iv) Scrabster

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	9	26	30	47	56	168	47	14	229
Individuals	Percentage	5%	15%	18%	28%	33%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	4	14	36	9	4	67	222	302	591
Individuals	Percentage	6%	21%	54%	13%	6%	No Data	0	0	No Data
Individuals	All other individual respondents	2	3	7	5	6	23	25	30	78
Individuals	Percentage	9%	13%	30%	22%	26%	No Data	0	0	No Data
Individuals	Total individuals answering	15	43	73	61	66	258	294	346	898
Individuals	% of individuals answering	6%	17%	28%	24%	26%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	0	0	0	0	0	1	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	1	0	1	0	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	0	0	1	0	1	1	0	2
Organisations	Total organisations answering	0	0	1	2	0	3	2	2	7
Organisations	% of organisations answering	0%	0%	33%	67%	0%	No Data	0	0	No Data
Total	All respondents answering	15	43	74	63	66	261	296	348	905
Total	% of all respondents answering	6%	16%	28%	24%	25%	No Data	0	0	No Data

Question 9(a) How satisfied are you with the public transport (bus/rail) to or from the NIFS terminals? (v) Stromness

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	20	77	39	10	9	155	53	18	226
Individuals	Percentage	13%	50%	25%	6%	6%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	9	23	39	5	2	78	217	297	592
Individuals	Percentage	12%	29%	50%	6%	3%	No Data	0	0	No Data
Individuals	All other individual respondents	3	6	7	2	2	20	26	31	77
Individuals	Percentage	15%	30%	35%	10%	10%	No Data	0	0	No Data
Individuals	Total individuals answering	32	106	85	17	13	253	296	346	895
Individuals	% of individuals answering	13%	42%	34%	7%	5%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	0	0	0	0	0	1	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	1	0	0	0	1	0	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	1	0	0	0	0	1	1	0	2
Organisations	Total organisations answering	1	1	1	0	0	3	2	2	7
Organisations	% of organisations answering	33%	33%	33%	0%	0%	No Data	0	0	No Data
Total	All respondents answering	33	107	86	17	13	256	298	348	902
Total	% of all respondents answering	13%	42%	34%	7%	5%	No Data	0	0	No Data

Question 9(b) How satisfied are you with the active travel infrastructure to or from the NIFS terminals? (i) Aberdeen

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	46	44	35	8	4	137	60	21	218
Individuals	Percentage	34%	32%	26%	6%	3%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	128	200	151	31	16	526	108	36	670
Individuals	Percentage	24%	38%	29%	6%	3%	No Data	0	0	No Data
Individuals	All other individual respondents	18	16	13	4	3	54	20	10	84
Individuals	Percentage	33%	30%	24%	7%	6%	No Data	0	0	No Data
Individuals	Total individuals answering	192	260	199	43	23	717	188	67	972
Individuals	% of individuals answering	27%	36%	28%	6%	3%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	10	0	1
Organisations	Freight company or representative body	0	0	0	0	1	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	0	0	0	1	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	1	1	0	0	0	2	0	0	2
Organisations	Total organisations answering	1	1	1	0	1	4	2	1	7
Organisations	% of organisations answering	25%	25%	25%	0%	25%	No Data	0	0	No Data
Total	All respondents answering	193	261	200	43	24	721	190	68	979
Total	% of all respondents answering	27%	36%	28%	6%	3%	No Data	0	0	No Data

Question 9(b) How satisfied are you with the active travel infrastructure to or from the NIFS terminals? (ii) Lerwick

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	15	23	25		1	64	72	68	204
Individuals	Percentage	23%	36%	39%	0%	2%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	108	176	183	33	20	520	95	44	659
Individuals	Percentage	21%	34%	35%	6%	4%	No Data	0	0	No Data
Individuals	All other individual respondents	12	15	13	3	2	45	22	15	82
Individuals	Percentage	27%	33%	29%	7%	4%	No Data	0	0	No Data
Individuals	Total individuals answering	135	214	221	36	23	629	189	127	945
Individuals	% of individuals answering	21%	34%	35%	6%	4%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	1	0	0	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	0	0	0	0	1	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	1	0	1	0	2	0	0	2
Organisations	Total organisations answering	0	1	2	1	0	4	2	1	7
Organisations	% of organisations answering	0%	25%	50%	25%	0%	No Data	0	0	No Data
Total	All respondents answering	135	215	223	37	23	633	191	128	952
Total	% of all respondents answering	21%	34%	35%	6%	4%	No Data	0	0	No Data

Question 9(b) How satisfied are you with the active travel infrastructure to or from the NIFS terminals? (iii) Kirkwall Hatston

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	15	35	51	29	16	146	53	17	216
Individuals	Percentage	10%	24%	35%	20%	11%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	25	23	64	26	14	152	224	208	584
Individuals	Percentage	16%	15%	42%	17%	9%	No Data	0	0	No Data
Individuals	All other individual respondents	1	5	5	2	5	18	29	28	75
Individuals	Percentage	6%	28%	28%	11%	28%	No Data	0	0	No Data
Individuals	Total individuals answering	41	63	120	57	35	316	306	253	875
Individuals	% of individuals answering	13%	20%	38%	18%	11%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	1	0	0	1	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	1	0	0	0	1	0	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	0	0	0	1	1	0	1	2
Organisations	Total organisations answering	0	1	2	0	1	4	1	2	7
Organisations	% of organisations answering	0%	25%	50%	0%	25%	No Data	0	0	No Data
Total	All respondents answering	41	64	122	57	36	320	307	255	882
Total	% of all respondents answering	13%	20%	38%	18%	11%	No Data	0	0	No Data

Question 9(b) How satisfied are you with the active travel infrastructure to or from the NIFS terminals? (iv) Scrabster

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	17	20	50	29	25	141	60	16	217
Individuals	Percentage	12%	14%	35%	21%	18%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	8	10	49	4	3	74	230	275	579
Individuals	Percentage	11%	14%	66%	5%	4%	No Data	0	0	No Data
Individuals	All other individual respondents	3	3	6	3	3	18	30	28	76
Individuals	Percentage	17%	17%	33%	17%	17%	No Data	0	0	No Data
Individuals	Total individuals answering	28	33	105	36	31	233	320	319	872
Individuals	% of individuals answering	12%	14%	45%	15%	13%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	0	0	0	0	0	1	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	1	0	0	1	0	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	0	0	0	0	0	0	2	2
Organisations	Total organisations answering	0	0	2	0	0	2	1	4	7
Organisations	% of organisations answering	0%	0%	100%	0%	0%	No Data	0	0	No Data
Total	All respondents answering	28	33	107	36	31	235	321	323	879
Total	% of all respondents answering	12%	14%	46%	15%	13%	No Data	0	0	No Data

Question 9(b) How satisfied are you with the active travel infrastructure to or from the NIFS terminals? (v) Stromness

Type	Respondent group	Very satisfied	Fairly satisfied	Neither	Fairly dis-satisfied	Very dis-satisfied	Sub total	Don't know	Not used this route	Grand total
Individuals	NIFS network resident – Orkney	45	56	38	5	4	148	53	15	216
Individuals	Percentage	30%	38%	26%	3%	3%	No Data	0	0	No Data
Individuals	NIFS network resident – Shetland	12	15	44	5	2	78	231	268	577
Individuals	Percentage	15%	19%	56%	6%	3%	No Data	0	0	No Data
Individuals	All other individual respondents	3	6	7		1	17	30	28	75
Individuals	Percentage	18%	35%	41%	0%	6%	No Data	0	0	No Data
Individuals	Total individuals answering	60	77	89	10	7	243	314	311	868
Individuals	% of individuals answering	25%	32%	37%	4%	3%	No Data	0	0	No Data
Organisations	Farming or land management organisation	0	0	0	0	0	0	1	0	1
Organisations	Freight company or representative body	0	0	0	0	0	0	0	1	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	0	0	1	0	0	1	0	1	2
Organisations	Port/harbour authority	0	0	1	0	0	1	0	0	1
Organisations	Public body	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	0	0	0	0	0	0	0	2	2
Organisations	Total organisations answering	0	0	2	0	0	2	1	4	7
Organisations	% of organisations answering	0%	0%	100%	0%	0%	No Data	0	0	No Data
Total	All respondents answering	60	77	91	10	7	245	315	315	875
Total	% of all respondents answering	24%	31%	37%	4%	3%	No Data	0	0	No Data

Question 17: Looking at the list below, what would you consider to be the top 3 priorities for the next NIFS contract?**Key to priority codes at Question 17**

A	Reliability:
A1	reliability is priority 1
A2	reliability is priority 2
A3	reliability is priority 3
B	Punctuality:
B1	punctuality is priority 1
B2	punctuality is priority 2
B3	punctuality is priority 3
C	Quality of on-board catering:
C1	Quality of on-board catering is priority 1
C2	Quality of on-board catering is priority 2
C3	Quality of on-board catering is priority 3
D	Quality of on-board accommodation:
D1	Quality of on-board accommodation is priority 1
D2	Quality of on-board accommodation is priority 2
D3	Quality of on-board accommodation is priority 3
E	Ease of changing a booking:
E1	Ease of changing a booking is priority 1
E2	Ease of changing a booking is priority 2
E3	Ease of changing a booking is priority 3
F	Ease of making a booking:
F1	Ease of making a booking is priority 1
F2	Ease of making a booking is priority 2
F3	Ease of making a booking is priority 3

G	Customer service by staff on-board:
G1	Customer service by staff on-board is priority 1
G2	Customer service by staff on-board is priority 2
G3	Customer service by staff on board is priority 3
H	Customer service by staff in ferry terminals:
H1	Customer service by staff in ferry terminals is priority 1
H2	Customer service by staff in ferry terminals is priority 2
H3	Customer service by staff in ferry terminals is priority 3
I	Signage at and en route to ferry terminal:
I1	Signage at and en route to ferry terminal is priority 1
I2	Signage at and en route to ferry terminal is priority 2
I3	Signage at and en route to ferry terminal is priority 3
J	Other:
J1	Other idea is priority 1
J2	Other idea is priority 2
J3	Other idea is priority 3
N/A	Not applicable

Question 17: Looking at the list below, what would you consider to be the top 3 priorities for the next NIFS contract?

Type	Respondent group	A1	A2	A3	B1	B2	B3	C1	C2	C3	D1	D2	D3	E1	E2	E3
Individuals	NIFS network resident – Orkney	130	49	20	3	66	30	4	13	23	53	47	34	3	16	47
Individuals	NIFS network resident – Shetland	231	177	100	3	65	78	11	48	67	290	192	102	10	50	77
Individuals	All other individual respondents	48	18	9	0	17	7	0	3	8	25	23	16	3	5	8
Organisations	Farming or land management organisation	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
Organisations	Freight company or representative body	2	0	0	0	2	0	0	0	0	0	0	0	0	0	0
Organisations	Local authority or transport partnership	3	0	0	1	0	1	0	0	0	0	0	0	0	0	0
Organisations	Other business or representative body	1	1	0	1	0	1	0	0	1	1	1	0	0	0	0
Organisations	Port/harbour authority	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0
Organisations	Public body	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Organisations	Voluntary sector organisation	1	1	0	0	0	1	0	0	0	1	1	0	0	0	0
Total	All respondents	419	247	129	8	151	119	15	64	99	370	264	152	16	71	133
Total	All respondents – combined ranking as one of top three priorities	795	N/A	N/A	278	N/A	N/A	178	N/A	N/A	786	N/A	N/A	220	N/A	N/A

Question 17: Looking at the list below, what would you consider to be the top 3 priorities for the next NIFS contract? (continued)

Type	Respondent group	F1	F2	F3	G1	G2	G3	H1	H2	H3	I1	I2	I3	J1	J2	J3
Individuals	NIFS network resident – Orkney	4	23	35	2	4	10	0	5	6	0	0	2	43	10	18
Individuals	NIFS network resident – Shetland	60	75	106	2	14	40	0	2	11	0	2	3	100	54	62
Individuals	All other individual respondents	4	15	22	0	0	4	0	0	1	0	1	1	13	8	11
Organisations	Farming or land management organisation	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0
Organisations	Freight company or representative body	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Organisations	Local authority or transport partnership	0	0	0	0	0	0	0	0	0	0	0	0	0	2	1
Organisations	Other business or representative body	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1
Organisations	Port/harbour authority	0	0	1	0	0	0	0	0	0	0	0	1	0	1	0
Organisations	Public body	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0
Organisations	Trade union	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0
Organisations	Voluntary sector organisation	0	1	0	0	0	0	0	0	1	0	0	0	1	0	1
Total	All respondents	68	114	164	4	18	54	0	7	20	0	3	7	160	76	95
Total	All respondents – combined ranking as one of top three priorities	346	N/A	N/A	76	N/A	N/A	27	N/A	N/A	10	N/A	N/A	331	N/A	N/A



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