

**ORIGIN AND DESTINATION OF  
PASSENGERS AND FREIGHT  
ON STRATEGIC SEA CROSSINGS**

**Final Report**

**To**

**HITRANS**

**Shetland Transport Partnership**

**Strathclyde Partnership for Transport**



**March 2007**

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## **1 INTRODUCTION**

This is the final report for a survey of the origin and destination of passengers and freight on strategic sea crossings in the areas covered by the following Regional Transport Partnerships:

- HITRANS.
- Shetland Transport Partnership.
- Strathclyde Partnership for Transport.

The research was undertaken between August 2006 and March 2007.

### **1.1 STUDY OBJECTIVES**

A previous HITRANS report (the *Strategic Sea Crossings Study*) identified a lack of basic information on the patterns of use of the main ferry services in the Highlands & Islands. In particular, there is little or no information on the origins and destinations of people and freight.

To this end, HITRANS and two other Transport Partnerships commissioned this research. It had the overall objective of generating information on the origin and destination, and other main characteristics, of passenger and freight traffic on the main (strategic) ferry services.

The detailed objectives were to:

- Conduct on-board surveys of passengers, including freight and coach traffic, in August and November 2006. The surveys took place, therefore, after the introduction of the Air Discount Scheme for residents of a number of islands that are also served by the strategic ferry crossings. They were also undertaken after the introduction of two free return ferry journeys to the mainland each year for eligible older and disabled people resident in Orkney, the Outer Hebrides and Shetland.
- Supplement these surveys with interviews with main freight carriers and coach tour operators.
- Prepare a report showing the main results from the research.
- Provide the clients with the full survey data in electronic format.

### **1.2 STUDY METHOD**

The on-board surveys were undertaken by George Street Research using a questionnaire designed by Reference which was agreed with the clients. The telephone surveys were carried out by Reference, who also undertook the analysis and reporting of the results of all the surveys undertaken for this study.

### 1.3 STRUCTURE OF THE REPORT

**Chapter 2** presents background information on the surveys. **Chapter 3** presents the findings from the surveys of non-freight traffic. **Chapter 4** presents the findings from the on-board surveys of freight traffic. **Chapter 5** contains the results of the telephone interviews with freight and coach operators.

An **Appendix** contains copies of the questionnaires used in the on-board surveys.

## 2 REPORT OF SURVEYS

### 2.1 ON-BOARD SURVEYS

These were undertaken in August and November 2006, across a range of days to ensure that both weekday and weekend traffic was surveyed. The numbers of interviews achieved on each route is shown at **Table 2.1**. Please note that passengers on a coach tour were not interviewed. This element of the market was the subject of a telephone survey of coach tour companies, the findings of which are reported at **Chapter 5**.

<b>TABLE 2.1: ON-BOARD SURVEYS</b>				
<b>Route</b>	<b>Operator</b>	<b>Number of Interviews</b>		
		<b>Non-Freight</b>	<b>Freight</b>	<b>Total</b>
<b>Cowal</b>				
Gourock-Dunoon	CalMac	179	29	208
Hunters Quay-McInroy's Point	Western Ferries	170	104	274
<b>North Ayrshire</b>				
Ardrossan-Brodick	CalMac	169	33	202
Claonaig-Lochranza	CalMac	15	2	17
Largs-Cumbræe	CalMac	173	40	213
<b>Argyll &amp; Bute</b>				
Wemyss Bay-Rothesay	CalMac	180	22	202
Colintraive-Rhubodach	CalMac	114	23	137
Kennacraig-Islay	CalMac	110	3	113
Oban-Colonsay	CalMac	40	3	43
Oban-Craignure	CalMac	181	35	216
Oban-Coll/Tiree	CalMac	50	5	55
<b>Highland</b>				
Corran	Highland Council	163	59	222
Mallaig-Armadale	CalMac	145	1	146
<b>Outer Hebrides</b>				
Oban-Castlebay	CalMac	94	6	100
Oban-Lochboisdale	CalMac	94	3	97
Uig-Lochmaddy	CalMac	69	22	91
Uig-Tarbert	CalMac	81	14	95
Ullapool-Stornoway	CalMac	131	13	144
<b>Orkney</b>				
Gills Bay-St Margaret's Hope	Pentland Ferries	159	12	171
Scrabster-Stromness	Northlink	151	7	158
Aberdeen-Kirkwall	Northlink	95	2	97
John O' Groats-Burwick	Thomas & Bews	63	-	63
<b>Shetland</b>				
Aberdeen-Lerwick	Northlink	98	2	100
Kirkwall-Lerwick	Northlink	22	0	22
<b>ALL ROUTES</b>				
<b>Totals</b>	<b>-</b>	<b>2,746</b>	<b>440</b>	<b>3,186</b>

The split of interviews by time of year was as follows:

- August: 1,847 (58% of total).
- November: 1,339 (42%).

It should be noted that interviews were undertaken only in August for the following two seasonal services: Lochranza-Claonaig; and Burwick-John O'Groats, which is a passenger-only operation.

In undertaking the surveys interviewing time was lost as follows. First, on a number of CalMac routes on the first day of surveys in August, interviewing started late as CalMac's headquarters had not informed the ship's crew that permission had been granted for surveying to take place.

Second, some days' sailings were disrupted due to adverse weather during November, meaning that interviewing could not take place. For Islay this affected two of the three survey days. In addition, on the following Outer Hebrides routes one out of three interviewing days was affected:

- Ullapool-Stornoway.
- Uig-Tarbert.
- Uig-Lochmaddy.
- Oban-Lochboisdale.
- Oban-Castlebay.

In terms of the distribution of interviews between August and November, the following routes saw more than two-thirds of interviews undertaken in August:

- Oban-Lochboisdale (92% of total interviews were undertaken in August).
- Kirkwall-Lerwick (77%).
- Kennacraig-Islay (73%).
- Mallaig-Armadale (68%).
- Oban-Castlebay (67%).

## 2.2 TELEPHONE SURVEYS

The ferry operators were approached with a view to providing the names of the main freight and coach tour companies using their services. However, not all were willing or able to supply us with this information. In particular, CalMac were unwilling to divulge the names of the relevant companies. Therefore, the samples had to be generated through our own research and pre-existing knowledge.

information was collected from **19 hauliers**, with some of these using more than one route. Effort was targeted at major users operating on routes where only a limited number of on-board freight surveys had been completed. However, some respondents were unable or unwilling to provide some of the data requested-in particular, mainland origins and destinations; and frequency of use.

In addition, interviews were undertaken with **seven** of the main identified **coach tour operators**.

### **3 FINDINGS: NON-FREIGHT TRAFFIC**

#### **3.1 COWAL**

##### **3.1.1 Hunters Quay-McInroy's Point (Western Ferries)**

A majority (65%) of passengers were **residents** of the Cowal/Helensburgh/Lomond area. The main other places of residence were: Inverclyde (10% of passengers) and Glasgow/Renfrewshire (8%). Some 4% of respondents had their usual place of residence outside Scotland.

In terms of **trip purpose**, the most popular response was Commuting. This was reported by 34% of the sample. The main other trip purposes were:

- Personal Business: 17%.
- Visiting Friends and Relatives (VFR): 15%.
- Employer's Business: 10%.

No other purpose was cited by more than 9%. Very few "tourists" were recorded as using this service. Only 4% of those surveyed were on a Short-break or Holiday away from home. In total 44% of passengers were travelling for non-leisure purposes. The figure for residents of Cowal/Helensburgh/Lomond area was slightly lower at 37%. They were less likely than the sample as a whole to be travelling on Employer's Business.

Most respondents (79%) were using the ferry as part of a **day trip from home**. Just over one in six (17%) were using the ferry as a part of a trip involving an overnight stay away from home.

The main **origins of the trips** being made on the day of survey were:

- Cowal/Helensburgh/Lomond: 65%.
- Inverclyde: 9%.
- Glasgow/Renfrewshire: 9%.

The main **trip destinations** were:

- Cowal/Helensburgh/Lomond: 35%.
- Inverclyde: 25%.
- Glasgow/Renfrewshire: 24%.

No other destination was cited by more than 4% of the sample.

Residents of Cowal/Helensburgh/Lomond were mostly travelling to either: Inverclyde (40%); or Glasgow/Renfrewshire (37%).

The main non-Cowal trip ends of those **not** living in Cowal/Helensburgh/Lomond were:

- Glasgow/Renfrewshire: 26%.
- Inverclyde: 24%.
- Lanarkshire/Falkirk/Dunbartonshire: 12%.

Almost all (92%) were making/had made the **other leg of their trip** using the Western Ferries service. Those travelling by a different means on the other leg mainly used CalMac's Gourock-Dunoon service.

Private Vehicle was the main mode of transport used to **travel to the ferry terminal**. It was used by three in four (75%) respondents. The main other modes used were: Walk (10%); and Scheduled Bus (8%).

Of those that had travelled to the ferry terminal by private car around two-thirds (64%) **accompanied the vehicle on the ferry**. Of those who did not, half (50%) had received a lift, while 43% had left their vehicle at the terminal. Thus, in total just over half (52%) of the interviewees were travelling on the vessel as **foot passengers**.

**Travel onwards from the ferry terminal** was largely through the same modes as for travel to the terminal where the ferry journey had originated. Private Vehicle was reported by 76% of passengers; Scheduled Bus by 10%; and Walk by 7%.

There is a generally high **frequency of use** among Western Ferries' passengers. Some 45% use the service more than weekly, with over two-thirds travelling at least fortnightly. Residents of Cowal/Helensburgh/Lomond made an average of 57 return trips per annum on the service.

The comparable figure for those living elsewhere was 27. This mainly reflects some high frequency of use among commuters living in Inverclyde.

There are two possible **alternatives to Western Ferries** which can be used to access the Cowal peninsula. Almost all (98%) passengers were aware that **another ferry service** could have been used for the trip they were making. The main reasons for **choosing to use the Western Ferries service** were:

- Frequency of sailing: 34%.
- Location of ferry terminals: 17%.
- Timing of departure/arrival: 11%.
- Lower cost of fares 8%.

Some 71% of respondents were aware of a **land-based alternative** to the ferry crossing. The main reasons for passengers **using the Western Ferries service** for the trip they were making were:

- Overall quicker journey: 58%.
- Overall cheaper journey: 13%.

### 3.1.2 Gourock-Dunoon (CalMac)

A slight majority (59%) of passengers surveyed were **residents** of Cowal/Helensburgh/Lomond. The main other places where passengers lived were: Inverclyde (19%); and Glasgow/Renfrewshire (9%). Some 6% of passengers lived outside Scotland.

Commuting was the most common **trip purpose**. It was cited by 34% of passengers.

The main other ones were:

- Personal Business: 20%.
- Employer's Business: 12%.
- VFR: 11%.

No other purpose was cited by more than 9% of the sample. Only 6% of passengers were travelling as part of a Short Break/Holiday away from home. In total, 46% of passengers were travelling for non-leisure purposes. The figure is significantly higher (63%) for those living outside Cowal/Helensburgh/Lomond.

The vast majority (81%) of passengers were travelling on the ferry as part of a **day trip from home**. A further 17% were using the ferry as a part of a trip involving an overnight stay away from home.

The main **origins of the trips** being made on the day of survey were:

- Cowal/Helensburgh/Lomond: 62%.
- Inverclyde: 21%.
- Glasgow/Renfrewshire: 9%.

The main **trip destinations** were:

- Cowal/Helensburgh/Lomond: 39%.
- Inverclyde: 27%.
- Glasgow/Renfrewshire: 23%.

Residents of Cowal/Helensburgh/Lomond were mostly travelling to either: Inverclyde (49%); or Glasgow/Renfrewshire (38%).

The main non-Cowal trip ends of those **not** living in Cowal/Helensburgh/Lomond were:

- Inverclyde: 47%.
- Glasgow/Renfrewshire: 26%.

The vast majority (95%) of passengers were making/had made the **other leg of their trip** using the CalMac service.

Private Vehicle was the main transport mode used to **travel to the ferry terminal**. However, it was used by less than half (44%) of the survey respondents. The most popular other forms of transport were:

- Walk: 26%.
- Train: 13%.
- Scheduled Bus: 12%.

Of those who had travelled to the terminal by Private Vehicle, only a small proportion (24%) **accompanied the vehicle on the ferry**. Of those who did not, a majority (69%) had received a lift, while a further 29% had parked their vehicle at the terminal. This implies that a very high proportion (89%) of those surveyed travelled as **foot passengers** on the ferry.

**Onward travel from the destination ferry terminal** was mainly by Private Vehicle. This was cited by 37% of respondents, followed by: Walk (25%); Train (18%); and Scheduled Bus (15%).

In terms of **frequency of use** 47% of passengers use the service more than weekly, with 60% travelling at least fortnightly. Residents of Cowal/Helensburgh/Lomond make an average of 53 return trips per annum on the service. The comparable figure for those resident elsewhere was 30 return trips per year, mainly reflecting high frequency of use among commuters living in Inverclyde.

There are two possible **alternatives to the CalMac ferry service** which can be used to access the Cowal peninsula. Almost all (97%) passengers were aware that **another ferry service** could have been used for the trip they were making. The main reasons for **choosing to use the CalMac service** were:

- Location of ferry terminals: 68%.
- Public transport connection: 12%.
- Lower fares 5%.

Some 54% of respondents were aware of a **land-based alternative** to the ferry crossing. The main reasons for passengers **using the CalMac ferry service** for the trip they were making at the time of interview were:

- Overall quicker journey: 54%.
- Unable to drive: 15%.

## 3.2 NORTH AYRSHIRE

### 3.2.1 Largs-Cumbræ

A slight majority (53%) of those interviewed were **residents** of Cumbræ. The main other places of residence were: North Ayrshire (19%); and Glasgow/Renfrewshire (13%).

In terms of **trip purpose** 26% were travelling for non-leisure reasons. Almost all of these, equal to 24% of the sample, were Commuting. Half of all commuters were residents of Cumbræ with most of the rest (38%) living in North Ayrshire. The main other trip purposes recorded were:

- Shopping: 24% (42% for Cumbræ residents).
- Other Leisure: 20%.
- Holiday/Short Break: 9%.

The vast majority (84%) of passengers were on a **day trip away from home**.

The main **trip origins** on the day of travel were:

- Cumbrae: 59%.
- North Ayrshire: 23%.
- Glasgow/Renfrewshire: 9%.

The **main trip destinations** were:

- North Ayrshire: 46%.
- Cumbrae: 42%.
- Glasgow/Renfrewshire: 8%.

For Cumbrae residents, the most important **mainland trip end** was North Ayrshire, reported by 81% of the relevant respondents. The only other significant trip end for those living on the island was Glasgow/Renfrewshire (12%).

Approaching half (46%) of passengers **travelled to the terminal** by Private Vehicle. Scheduled Bus was also common and was reported by more than one in three (35%) passengers. It was used by almost half (48%) of Cumbrae residents. Some 12% Walked to the terminal while 6% reported using the Train.

Private vehicle was the most common mode of transport to the terminal of departure. However, very few (one in seven) of these passengers actually **accompanied their vehicle** on the ferry. Most (72%) had left their vehicle at the terminal while almost all of the others (26%) had received a lift. Overall, 94% of interviewees were travelling as **foot passengers** on the ferry.

In terms of **travel onwards from the ferry terminal**, most (38%) would be travelling via Private Vehicle. Similar levels would be using Scheduled Bus (30%) or Walk (28%). Train would be used by 5%.

Among our sample, **frequency of use** of the Largs-Cumbrae ferry service was relatively high. Over half (57%) use it more than weekly, while over two thirds travel at least fortnightly. Across all users, the mean number of return trips per annum is 50: that is, just under once per week. The figure for Cumbrae residents is higher, with a mean of 69 trips per year.

### 3.2.2 Ardrossan-Brodick

Only a minority of respondents (37%) were **residents** of Arran. Of the other passengers the main places of residence were:

- Outside Scotland: 16% of all passengers.
- Glasgow/Renfrewshire: 16%.
- South/East Ayrshire/Dumfries & Galloway: 9%.

For the sample as a whole, the most popular **trip purpose** was Short Break/Holiday. This was reported by over in three (35%) of passengers. Of these trips, the vast majority (83%) were a Short Break which was defined as a trip involving up to 4 nights away from home.

Those on Holiday/Short Break were mainly from either: outside Scotland (20%); or Glasgow/Renfrewshire (also 20%).

The other main trip purposes reported were: VFR (18%); and Personal Business (13%). Around one in eight (12%) of the passengers were travelling for non-leisure purposes. These divided between: Employer's Business (7%); and Commuting (5%).

For **Arran residents** the main trip purposes were:

- Personal Business: 24%.
- Shopping: 16%.
- VFR: 15%.

As with the sample as a whole, 12% of the island residents were travelling for non-leisure purposes. They were split evenly between Commuting and Employer's Business.

Just under half (49%) of the passengers were undertaking a trip that involved an **overnight stay away from home**. The remainder were on a day trip and over two thirds (68%) of these passengers were undertaking a **day trip from their home**.

The main trip **origins** on the day of travel were:

- Arran: 39%.
- Glasgow/Renfrewshire: 20%.
- South/East Ayrshire/Dumfries & Galloway: 14%.
- North Ayrshire: 8%.

The main trip **destinations** on the day of travel were:

- Arran: 58%.
- South/East Ayrshire/Dumfries & Galloway: 10%.
- Glasgow/Renfrewshire: 10%.
- North Ayrshire: 9%.

The most important mainland trip ends for Arran residents were:

- Glasgow/Renfrewshire: 31%.
- South/East Ayrshire/Dumfries & Galloway: 29%.
- North Ayrshire: 16%.

The most popular mainland trip ends for those **not** living on Arran were:

- Glasgow/Renfrewshire: 33%.
- South/East Ayrshire/Dumfries & Galloway: 24%.
- North Ayrshire: 21%.

Less than 1% of the sample were using the other Arran ferry service (Claonaig-Lochranza) for the other leg of their trip.

Private Vehicle was the main **mode of transport used to travel to the ferry terminal**. This was reported by over two in three (69%) passengers. The main other modes used were: Train (13%); and Scheduled Bus (11%).

Of those that had arrived at the terminal by Private Vehicle, just over half (52%) **accompanied their vehicle on the ferry**. Of those who did not travel with the vehicle most (70%) left it at the terminal, with a further 29% having received a lift.

The survey results indicate that approaching two in three (64%) interviewees were travelling as **foot passengers**. The figure (79%) is higher for Arran residents.

**Travel onwards from the destination ferry terminal** was by:

- Private Vehicle: 60%.
- Scheduled Bus: 21%.
- Walk: 9%.
- Train: 7%.

In terms of **frequency of use**, over one in four (27%) had made no other trips on the ferry in the last 12 months. At the other end of the scale, some 8% use the ferry at least weekly and a total of 18% travel on the route at least fortnightly. Across the sample as whole the average (mean) number of annual return trips on the service was 16. The figure for Arran residents was 29.

The vast majority (89%) of those accompanying a vehicle on the ferry had **booked in advance**. There was a quite even distribution in terms of how far in advance that the booking had been made, although relatively few (9%) had booked less than 24 hours before the sailing. 38% booked over a fortnight before their trip. Across all the relevant respondents, the mean (average) was just over two weeks.

### 3.2.3 Claonaig-Lochranza

Only 7% of passengers were **resident** on Arran. Two thirds (67%) of the sample as a whole lived outside Scotland.

The main **trip purposes** were:

- Holiday/Short Break. This was reported by over half (60%) of interviewees, most of whom were on a Holiday rather than Short Break.
- VFR: 13%.

Trips were split evenly between those that were a **day trip** and those that involved an **overnight stay away from home**. Almost all (86%) day trips were not made from home but from another location.

The main trip **origins** on the day of survey were:

- Arran: 47%.
- Kintyre/Mid Argyll: 27%.
- Other islands-Bute, Islay and Gigha: 21%.

The main trip **destinations** on the day of survey were:

- Arran: 40%.
- Kintyre/Mid Argyll: 20%.
- Other islands-Mull and Gigha: 14%.

Thus Kintyre/Mid Argyll was the most important trip end outwith Arran. It was reported by 44% of respondents.

The vast majority of passengers (87%) had undertaken or expected to undertake the **other leg of their journey** using the Claonaig-Lochranza service. The remaining 13% would use/had used the Ardrossan-Brodick route.

Approaching all (87%) interviewees had **travelled to the terminal** by Private Vehicle. All of those who had done so accompanied their vehicle on the ferry. The remaining 13% had cycled to the terminal. The **modes of onward transport from the destination ferry terminal** were:

- Private Vehicle: 93%.
- Cycle: 7%.

In terms of **frequency of use**, virtually all (93%) of the passengers had made no other trips on the Claonaig-Lochranza ferry service in the past 12 months. The remaining 7% had made 7 return trips in the last year.

### 3.3 ARGYLL & BUTE

#### 3.3.1 Wemyss Bay-Rothesay

Over one third (38%) of the passengers interviewed were **residents** of Bute. Those living elsewhere were largely from Glasgow/Renfrewshire, accounting for 33% of the sample. The other main places of residence were: outside Scotland (8%); and North Ayrshire (7%).

A wide spread of **trip purposes** was reported. The most common ones were:

- VFR: 20%.
- Other Leisure: 18%.
- Holiday/Short Break: 15%, split evenly between these two trip types.
- Commuting: 11%.

Around one in six (16%) passengers were travelling for non-leisure purposes. This includes 5% on Employer's Business.

Shopping was the most common trip purpose for Bute residents. This was reported by 24% of them. The main other purposes were Commuting; Other Leisure; and Personal Business. Each of these was reported by 12% of island residents.

Two thirds (67%) of passengers were on a **day trip**, with the vast majority (88%) of these making their **day trip from home**. Over three quarters (78%) of Bute residents were making a day trip.

The most popular trip **origins** on the day of travel were:

- Bute: 47%.
- Glasgow/Renfrewshire: 26%.
- North Ayrshire: 11%.

The most popular trip **destinations** on the day of travel were:

- Bute: 51%.
- Glasgow/Renfrewshire: 23%.
- Inverclyde: 12%.

The most significant mainland trip ends for residents of Bute were:

- Glasgow/Renfrewshire: 36%.
- Inverclyde: 30%.
- North Ayrshire: 19%.

The most important mainland trip ends for those **not** living on Bute were:

- Glasgow/Renfrewshire: 60%.
- North Ayrshire: 16%.
- South/East Ayrshire/Dumfries & Galloway: 10%.

Thus Inverclyde generates significant demand for trips made by islanders but the flows originating in Inverclyde are much lower. Also, demand for travel to Bute is largely from the Glasgow/Renfrewshire area.

Almost all (98%) passengers were **using the Wemyss Bay-Rothesay service in both directions** for their return trip to/from Bute.

The most popular **modes of transport to the ferry terminal** were:

- Private Vehicle: 60%.
- Walk: 18%.
- Scheduled Bus: 11%.
- Train: 9%.

Of those travelling by Private Vehicle, less than half (30%) **accompanied the vehicle on the ferry**. Of those who did not:

- 55% had received a lift.
- 41% left the vehicle at the terminal.

Overall, the survey results imply that 82% of those interviewed were **travelling as foot passengers** on the ferry.

The most common modes of transport for **onward travel from the destination ferry terminal** were:

- Private Vehicle: 44%.
- Walk: 23%.
- Train: 20%.
- Scheduled Bus: 10%.

In terms of **frequency of use** of the Wemyss Bay-Rothesay service, very few (11%) passengers had made no other trips on the route in the past 12 months. Across all those surveyed, the average (mean) frequency of use is 25 return trips per year: that is, almost one trip every fortnight. For residents of Bute the average number of return trips per year is 40, and over one in four (26%) travel on the route at least weekly.

Only 34% considered that **another ferry route could have been used to travel to/from Bute**. The main reasons given for **choosing to use the Wemyss Bay-Rothesay service** were the greater suitability of:

- Frequency of sailing: 30%. This is somewhat surprising as the Rhubodach service operates at a greater frequency. Some of the value that respondents attach to the Rothesay service may, in fact, be due to it operating to a fixed timetable throughout the day, unlike the service at the north of the island.
- Location of terminals: 26%.
- Timings of sailing arrivals and departures: 26%.

### 3.3.2 Colintraive-Rhubodach

Less than half (38%) of the passengers surveyed were **resident** on Bute. The main other places of residence were:

- Outside Scotland: 21%.
- Cowal/Helensburgh/Lomond: 14%.
- Glasgow/Renfrewshire: 11%.

The most common **trip purpose** was Holiday/Short Break. This was reported by around one quarter (26%) of the passengers. Well over half (69%) of those on a Holiday/Short Break lived outside Scotland.

The main other trip purposes were:

- Other Leisure: 20%.
- Employer's Business: 17%.
- Commuting: 11%.
- VFR 10%.

Thus 28% of passengers were on non-leisure trips. This is high compared to many of the other routes surveyed. This reflects the relatively high proportion of users (around one in six) travelling on Employer's Business. A majority of Employer's Business and Commuting trips were inbound to Bute.

For those living on Bute the main trip purposes were:

- Other Leisure: 33%.
- Employer's Business: 16%.
- Personal Business: 14%.
- Commuting: 12%.
- VFR: 12%.

A clear majority of passengers were making a **day trip**. Within this group, around three in four (78%) were making a **day trip from home**.

The most popular trip **origins** on the day of travel were:

- Bute: 43%.
- Cowal/Helensburgh/Lomond: 27%.
- Kintyre/Mid Argyll: 13%.
- Glasgow/Renfrewshire: 6%.

The most popular trip **destinations** on the day of travel were:

- Bute: 54%.
- Cowal/Helensburgh/Lomond: 16%.
- Glasgow/Renfrewshire: 11%.
- Kintyre/Mid Argyll: 8%.

The most significant mainland trip ends for residents of Bute were:

- Cowal/Helensburgh/Lomond: 40%.
- Glasgow/Renfrewshire: 21%.
- Kintyre/Mid Argyll: 21%.

The most important mainland trip ends for those **not** living on Bute were:

- Cowal/Helensburgh/Lomond: 42%.
- Kintyre/Mid Argyll: 20%.
- Glasgow/Renfrewshire: 14%.

Thus Glasgow/Renfrewshire is more important in terms of attracting trips from Bute residents than it is in generating travel to the island.

82% of passengers were using the Colintraive-Rhubodach service for both **legs of their journey**.

Private Vehicle dominated the **modes of transport to the ferry terminal**. It was used by 94% of respondents, with 4% Cycling and 1% travelling by Scheduled Bus. Of those travelling by Private Vehicle, 91% accompanied the vehicle. This implies that 14% of passengers travel on the ferry as **foot passengers**. Of those who did not accompany the Private Vehicle on the ferry most (80%) had left their vehicle at the terminal.

The most common modes of transport for **onward travel from the destination ferry terminal** were:

- Private Vehicle: 90%.
- Walk: 4%.
- Cycle: 4%.
- Scheduled Bus: 1%.

In terms of **frequency of use** of the Colintraive-Rhubodach service, just over one fifth (22%) of passengers had made no other trips on the service in the past 12 months. Some 28% use the service at least fortnightly and 18% more than weekly.

The average (mean) number of return trips per annum made by users is 24 trips. The figure for Bute residents is 37, with 33% of residents using the service more than once per week.

Some 25% considered that they **could have used the island's other ferry service**-ie via Rothesay-for the trip they were making. The main reasons for **choosing to use the Colintraive-Rhubodach service** were:

- Cheaper fares: 29% of relevant respondents. The figure was 46% for Bute residents.
- Shorter overall journey time: 24%.

### 3.3.3 Kennacraig-Islay

**Residents** of Islay accounted for under a quarter (23%) of those interviewed. Across the sample as a whole the main place of residence identified was Outside Scotland (30%). The other main place of residence was Edinburgh/Lothian/Borders (10%).

In terms of **trip purpose**, just over half (51%) of the respondents were on Holiday/Short Break, with most of these passengers (82%) on Holiday: that is, staying away from home for more than four nights.

The other main trip purposes were: VFR (17%); and Employer's Business (13%). In total one in six (16%) were on trips with non-leisure purposes. The 3% of the sample that were Commuting were all non-island residents; while over two-thirds (71%) of those travelling on Employer's Business were from outside Islay.

The main trip purposes for Islay residents were:

- Personal Business: 24%.
- VFR: 20%.
- Other Leisure: 20%.

Only 7% of the sample were on a **day trip**. However, this figure was higher (16%) of for island residents.

The most popular trip **origins** on the day of travel were:

- Islay: 43%.
- Kintyre/Mid Argyll: 16%.
- Glasgow/Renfrewshire: 15%.

A further 5% started their journey from Jura.

The main **destinations** on the day of travel were:

- Islay: 47%.
- Glasgow/Renfrewshire: 13%.
- Outside Scotland: 11%.

A further 5% were travelling to Jura.

The most significant mainland trip ends for residents of Islay were:

- Glasgow/Renfrewshire: 54%.
- Kintyre/Mid Argyll: 15%.
- Lanarkshire/Falkirk/Dunbartonshire: 12%.

Thus the central belt is a much greater trip generator than other parts of Argyll & Bute.

The most important mainland trip ends for those not living on Islay were much more widely spread, as follows:

- Kintyre/Mid Argyll: 17%.
- Glasgow/Renfrewshire: 17%.
- Outside Scotland: 14%.

Reflecting the ferry timetabling, there is a tendency for those whose true origins are distant from Kennacraig to travel to Kintyre/Mid Argyll and stay overnight before taking the ferry to Islay the next day. However, on the return leg there is an apparent tendency to leave Islay on a morning sailing and to then travel directly back home.

Private Vehicle was clearly the main **mode of transport to the ferry terminal**. It was reported by 82% of interviewees. The main other modes were: Scheduled Bus (14%); and Private Coach (3%).

The vast majority (80%) of those arriving by Private Vehicle accompanied the vehicle on the ferry. This implies that just over one third (34%) travelled as **foot passengers**. Of those not accompanying their vehicle a slight majority (56%) got a lift, with the remainder (44%) leaving their vehicle at the ferry terminal. Very few Islay residents left their vehicle at the terminal.

The most common modes of transport for **onward travel from the destination ferry terminal** were:

- Private Vehicle: 85%.
- Scheduled Bus: 13%.
- Private Coach: 3%.

In terms of **frequency of use** of the Islay service, reflecting the high proportion of visitors in the sample, more than one in five (22%) had made no other trips on the route in the past year. Just 4% use the service more than every two weeks.

Only 12% of island residents use the service more than fortnightly, with a total of 28% travelling at least every 4 weeks. Islay residents make an average (mean) of 14 return trips per annum. This compares to 7 return trips for the survey sample as a whole.

Almost every (99%) passenger accompanying their vehicle had **booked in advance**. The results also show that:

- Very few (4%) had booked less than 24 hours in advance.
- Almost half (48%) had made the booking at least two weeks before the sailing.

In total the average (mean) number of days in advance for bookings was 19.

A high proportion (81%) of passengers were **aware of an air service that could have been used as an alternative** to the Kennacraig-Islay ferry. The **main reasons for choosing to use the ferry** were:

- Convenience of travelling with one's own car: 51%.
- Lower fares: 28%.

However, the responses were different for Islay residents. The proportions identifying the convenience of having a car and lower fares were identical (32%). A further 11% chose the ferry because of luggage restrictions when flying.

### 3.3.4 Oban-Colonsay

The survey captured relatively few **residents** of Colonsay. They accounted for just 15% of the sample. The main place of residence among passengers was: Outside Scotland (38%); and Edinburgh/Lothian/Borders (15%).

Reflecting these findings, the **main trip purpose** was Holiday (51%) followed by VFR (15%). Short Break and Personal Business each accounted for 13% of the trip purposes identified. 11% were travelling for non-leisure purposes, all of whom were non-island residents; mostly (8% of the survey sample) on Employer's Business.

The most popular trip **origins** on the day of travel were:

- Colonsay: 43%.
- North Argyll: 15%.
- Edinburgh/Lothian/Borders: 10%.
- Outside Scotland: 10%.

The main **destinations** on the day of travel were:

- Colonsay: 57%.
- North Argyll: 18%.
- Edinburgh/Lothian/Borders: 8%.

The most significant mainland trip ends for residents of Colonsay were: North Argyll (66%); and Edinburgh/Lothian/Borders (34%).

The most important mainland trip ends for those **not** resident on Colonsay were much more widely spread as follows:

- North Argyll: 27%.
- Edinburgh/Lothian/Borders: 15%.
- Outside Scotland: 15%.

A further 9% were travelling to/from Mull & Iona.

Almost all (95%) were using **the Oban-Colonsay service** on the other leg of their trip to/from the island. Just 2% were also using the Colonsay-Islay route.

Private Vehicle was clearly the main **mode of transport to the ferry terminal**. It was reported by 75% of interviewees. The main other modes were: Walk (10%); Train (8%); and Scheduled Bus (8%).

Of those arriving by Private Vehicle almost three in four (73%) were accompanying their vehicle on the ferry. On this basis, 45% of respondents were travelling as **foot passengers** on the vessel. Those not accompanying the vehicle were evenly split between those who had left it at the ferry terminal and those who had received a lift.

The most common mode of transport for **onward travel from the destination ferry terminal** was, again, Private Vehicle. This was reported by 78% of passengers. Each of Walk; Train; and Taxi was used by 5% of respondents.

In terms of **trip frequency**, reflecting the profile of respondents, 43% had made no other trip on the Oban-Colonsay service in the last 12 months. For the sample as a whole, the average (mean) number of trips in the past year was six. For Colonsay residents the figure was 15.

Almost three quarters (73%) of those accompanying a vehicle had **booked in advance**. This is quite low given the limited frequency of the service. Of those that had booked, more than half (56%) did so more than four weeks in advance. The mean number of days for advance booking was 29.

Thus while the level of advance booking was lower than might have been expected those that do book do so well ahead of the day of sailing.

Around two thirds (65%) of those using the service were **aware of an alternative ferry route** that could have been used for their trip. The main reason for **choosing the Oban route** rather than travelling via Islay was that the location of the mainland ferry terminal was more suitable. This was cited by 57% of those aware of an alternative service.

### 3.3.5 Oban-Craignure

In terms of place of **residence**, the main locations were:

- Mull: 33%.
- Outside Scotland: 33%.
- North Argyll: 11%.

A further 2% of passengers lived on Iona.

There was a wide variety of **trip purposes**. The main ones were:

- Holiday 31%.
- Personal Business: 19%.
- VFR: 12%.
- Shopping: 11%.

Around one in seven (14%) passengers were travelling for non-leisure purposes. These divided between Employer's Business (9%); and Commuting (5%). A majority (56%) of the former were residents of North Argyll, with a further 19% from Mull. Similarly, most (78%) commuters were from North Argyll, with the balance (22%) from Mull.

The main trip purposes of residents of Mull/Iona were largely either:

- Personal Business (40%).
- Shopping (32%).

Work/business purposes were clearly the main trip purposes of residents of North Argyll.

A slight majority (54%) were on a **day trip** rather than one which involved an overnight stay. Most were on a **day trip from home**. Some 19% of those visiting Mull were doing so as a **day trip while staying away from home**.

The most popular trip **origins** on the day of travel were:

- Mull: 45%.
- North Argyll: 32%.

Similarly, the main **destinations** on the day of travel were:

- Mull: 43%.
- North Argyll: 30%.

A further 6% were travelling to Iona.

The most significant mainland trip end for residents of Mull & Iona was North Argyll. This was cited by 75% of respondents.

The most important mainland trip end for **non-island residents** was North Argyll (49%). Even when residents of that area are excluded it remains an important trip end for all other users. This shows that those travelling to Mull largely tend to stay in North Argyll on the night before sailing to the island.

Almost all (94%) of passengers were making both legs of their trip using the **Oban-Craignure** service. Only 4% of the sample also used the Lochaline-Fishnish route.

Private Vehicle was clearly the main **mode of transport to the ferry terminal**. It was reported by 75% of interviewees. The other main modes were: Walk (13%); and Scheduled Bus (9%). Only 1% used train.

Over half (57%) of those travelling by Private Vehicle accompanied their vehicle on the ferry. Thus, a majority (57%) of those using the ferry travelled as **foot passengers**. Of those not accompanying their vehicles, there was a broadly even split between those leaving the vehicle at the terminal (48%) and those who got a lift (46%).

The most common mode of transport for **onward travel from the destination ferry terminal** was, again, Private Vehicle. This was reported by 65% of passengers. Some 18% cited Walk; 10% were using Scheduled Bus; and 4% travelling by train.

In terms of **frequency of use**, residents of Mull/Iona undertake a mean (average) of 32 return trips per annum. Approaching half (48%) use the service at least fortnightly.

The trip-making frequency of North Argyll residents is very similar to that of Mull/Iona residents. This reflects the trip purposes of this group with their emphasis on business/commuting. The average (mean) return trips per annum is 33; that is, very slightly above the level for the residents of the two islands. 45% of North Argyll residents use the service at least once a fortnight.

Trip-making frequency was much lower for those who were resident in other areas. Of these, around two thirds (65%) had made no other return trips on the Craignure service within the past 12 months.

Most (80%) of those accompanying a vehicle had **booked in advance**. However, few (13%) of these passengers had booked more than four weeks before the day of sailing. 3-7 days in advance was the most popular response (40%).

Just over half (52%) of the passengers were aware of an **alternative ferry route** that could have been used for their trip to/from Mull. Of those identifying an alternative this was largely Lochaline-Fishnish (86%) rather than Tobermory-Kilchoan (14%). The two main reasons for **choosing the Oban-Craignure** route were:

- More suitable locations of terminals: 46%.
- Shorter overall journey time: 29%.

### 3.3.6 Oban-Coll/Tiree

In terms of **place of residence**, those living in Tiree or Coll accounted for 28% of the sample (Tiree 16%; and Coll 12%). The main other place of residence was Outside Scotland which was cited by one in five respondents. Residents of North Argyll accounted for only 6% of interviewees-a much lower proportion than on the Oban-Craignure service.

Passengers' main **trip purposes** were:

- Holiday: 32%.
- VFR: 22%.
- Personal Business: 18%.

Non-leisure purposes were cited by 8%. These were mainly Employer's Business (6% of the entire sample). Residents of Coll/Tiree reported a wide range of trip purposes. The main one was Personal Business (29%).

Reflecting the timetable, over three quarters (76%) of the sample were using the ferry service as part of a trip involving an **overnight stay**. A further 12% were making a **day trip while staying away from home**.

The most popular trip **origins** on the day of travel were:

- North Argyll: 38%.
- Tiree: 32%.
- Glasgow/Renfrewshire: 10%.
- Coll: 8%.

The main **destinations** on the day of travel were:

- Tiree: 36%.
- North Argyll: 22%.
- Glasgow/Renfrewshire: 14%.
- Coll: 12%.

For Coll/Tiree residents the most important mainland trip ends were: North Argyll (62%); and Glasgow/Renfrewshire (23%). The main trips ends for those resident elsewhere were similar: North Argyll (52%); and Glasgow/Renfrewshire (21%).

All interviewees were using the Oban-Coll/Tiree service for **both legs** of their trip.

Private Vehicle was the main **mode of transport to the ferry terminal**. It was reported by 72% of interviewees. The other main modes were: Walk (12%); and Scheduled Bus (6%). Only 2% used train.

A majority (61%) of those travelling by Private Vehicle **accompanied the vehicle on the ferry**. This indicates that just over half (56%) travelled on the ferry as **foot passengers**. Of those who did not travel with the Private Vehicle on the boat, most (64%) had received a lift, with less than one in three (29%) leaving their vehicle at the terminal.

The most common mode of transport for **onward travel from the destination ferry terminal** was largely Private Vehicle. This was reported by 80% of passengers. Some 8% cited Walk; while none were travelling by Train.

In terms of **trip frequency**, Coll/Tiree residents make an average of 16 return trips per annum on the Oban service. 43% use the ferry at least every 4 weeks. As would be expected, almost half (47%) of non-residents had made no other trip on then Oban-service in the past 12 months.

Of those accompanying a Private Vehicle on board the ferry the vast majority (91%) had **booked in advance**. One in five had made the booking up to two days in advance and the same proportion had booked more than four weeks ahead. The average (mean) number of days for advance booking was 16.

Over two thirds (68%) were **aware of an air service** that could have been used for the trip they were making using the ferry. The main reasons for **choosing the Oban-Coll/Tiree ferry** were:

- Convenience of travelling with one's own car: 46%.
- Lower fares: 27%.

### 3.4 HIGHLAND

#### 3.4.1 Corran Ferry

In terms of **place of residence**, the sample was split evenly between those living in Lochaber (50%) and those resident elsewhere. The main other places of residence were:

- Outside Scotland: 23%.
- Edinburgh/Lothian/Borders: 7%.

Passengers' main **trip purposes** were:

- Holiday/Short-Break: 38%. Most (71%) of these interviewees were on a touring holiday visiting a number of locations.
- Commuting: 31%.
- Shopping: 9%.

A further 5% were travelling on Employer's Business.

Exactly half of Lochaber residents were Commuting. A further 17% were Shopping, while 7% were either on Employer's Business, Personal Business or VFR trips.

Over half (60%) of passengers were on a **day trip from home**. A further 29% were on a trip involving **an overnight stay away from home**.

The most popular trip **origin** on the day of travel was clearly Lochaber. This was reported by almost three-quarters (73%) of passengers. The main other trip origins were:

- North Argyll: 5%.
- Edinburgh/Lothian/Borders: 4%.
- Outside Scotland: 4%.

The main **destinations** on the day of travel were:

- Lochaber: 72%.
- Mull: 17%. A further 2% were travelling to Iona.
- North Argyll: 3%.

The main non-Lochaber trip ends for the area's residents were:

- Mull: 35%.
- North Argyll: 20%.

For those living outside the area, the main non-Lochaber trip ends were:

- Mull/Iona: 34%.
- North Argyll: 11%.
- Edinburgh/Lothian/Borders: 10%.

14% of the sample stated that they would be using/had used the Lochaline-Fishnish service in conjunction with the Corran route.

Almost all (96%) passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. A further 2% had travelled by Scheduled Bus. Only 1% of those who had arrived by Private Vehicle were not **accompanying the vehicle** on the ferry.

For the vast majority of passengers the most common mode of transport for **onward travel from the destination ferry terminal** was, again, Private Vehicle. This was reported by 97% of passengers. A further 2% cited Walk.

In terms of **trip frequency**, Lochaber residents make considerable use of the Corran service. The average (mean) number of return trips per annum is 39, with over half (57%) travelling on the ferry at least every two weeks and one in three (33%) travelling more than once a week.

In comparison, only 10% of non-residents use the service at least every four weeks. A majority (62%) had made no other trips on Corran ferry in the previous 12 months.

80% of passengers were aware of a **road-based alternative** to the Corran service that could have been used to make their trip. Two-thirds of those living outside Lochaber were aware of this option. Almost the sole reason for **choosing to travel by ferry** was an overall quicker journey. This was reported by 99% of relevant respondents.

### 3.4.2 Mallaig-Armadale

In terms of **place of residence**, few respondents (8%) live on Skye. Indeed, a greater proportion of passengers (17%) live in Lochaber. Apart from these two locations the main places of residence were:

- Outside Scotland: 47%.
- Edinburgh/Lothian/Borders: 6%.

Holiday/Short Break was clearly the main **trip purpose**. It was reported by almost two in three (65%) interviewees. Within this, the main type was a touring holiday staying in more than one location.

For those living on Skye the main trip purposes were: Personal Business (33%); and Shopping (33%). A further 25% were Commuting.

Residents of Lochaber were travelling for a wide variety of purposes. The main ones were:

- Commuting: 24%.
- To/from Place of Education: 20%.
- Employer's Business: 16%.

Two thirds (67%) of the sample were making a trip involving an **overnight stay away from home**. A further one in four (24%) were making a **day trip from home**, while only 9% were travelling to/from Skye for a **day trip while staying away from home**.

Day trips were particularly common among residents of Skye (83%) and those living in Lochaber (84%).

The most popular trip **origins** on the day of travel were:

- Lochaber: 43%.
- Skye: 38%.
- Inverness/East Highland/Moray: 3%.
- Glasgow/Renfrewshire: 3%.

The main **destinations** on the day of travel were:

- Skye: 50%.
- Lochaber: 24%.
- Wester Ross: 5%.

One quarter of Skye residents had trip ends that were outside Lochaber. These were: Wester Ross; Glasgow/Renfrewshire; and Outside Scotland. 20% of Lochaber residents had trip ends that were not on Skye. These were Wester Ross and Harris.

For those not living either on Skye or in Lochaber the most popular mainland trip ends were:

- Lochaber: 52%.
- Glasgow/Renfrewshire: 7%.
- North Argyll: 6%.

Approaching two thirds (64%) of interviewees were making a trip **using the Mallaig-Armadale ferry in both directions**. A further 31% were using the Skye Bridge in conjunction with the ferry, while 5% were making use of another ferry service.

Three quarters (75%) of the sample used Private Vehicle as their **mode of transport to the ferry terminal**. 13% had Walked, with 7% travelling by Scheduled Bus and 4% using the Train.

The vast majority (87%) of those arriving at the terminal by Private Vehicle **accompanied the vehicle** on the ferry crossing. Of those who did not, 62% had received a lift while the balance (38%) had left their vehicle at the ferry terminal. The survey results indicate that 35% of those using the Mallaig-Armadale ferry service travel as **foot passengers**.

For the majority of passengers the most common mode of transport for **onward travel from the destination ferry terminal** was Private Vehicle. This was reported by 73% of respondents. The main other modes were: Scheduled Bus (14%); Train (8%); and Walk (7%).

**Frequency of use** of the Mallaig-Armadale service is higher among residents of Lochaber than for those living on Skye. Among the former, the average number of return trips per year is 27, compared to 19 for the latter. One in six (16%) of Lochaber residents using the service do so at least weekly.

Among those living elsewhere, 89% had made no other trips on the ferry service in the last 12 months.

Of those accompanying a vehicle on the ferry not all (only 86%) respondents were aware that the service was one **where a booking could be made**. Just over two-thirds (68%) of those that accompanied a vehicle had **booked in advance**. However, a significant proportion (46%) of these passengers had booked less than 24 hours before the time of departure.

The great majority (85%) of passengers were **aware of a road/bridge alternative** that could have been used for their trip to/from Skye. The main reasons for **choosing to use the ferry service** were:

- Overall quicker journey: 68%.
- Will be using/had used Skye Bridge on the other leg of the trip: 10%.

### 3.5 OUTER HEBRIDES

#### 3.5.1 Ullapool-Stornoway

In terms of **place of residence**, 30% of passengers lived in the Outer Hebrides. Of these, the vast majority were from Lewis, with only 5% of island residents living in Harris. The other main places of residence among the sample were:

- Outside Scotland: 27%.
- Inverness/East Highland/Moray: 13%.

Passengers' **main trip purposes** were:

- Holiday/Short Break: 47%.
- VFR: 16%.
- Employer's Business: 15%.

A further 5% were Commuting to/from their regular place of work.

For residents of the Outer Hebrides, the main trip purposes were: Holiday/Short Break (33%); and Commuting (18%).

Approaching three quarters (73%) of passengers were making a trip which involved an **overnight stay away from home**. A further 18% were making a **day trip while staying away from home**.

The most popular trip **origins** on the day of travel were:

- Lewis: 37%.
- Wester Ross: 27%.
- Inverness/East Highland/Moray: 23%.
- Harris: 5%.

The main **destinations** on the day of travel were:

- Lewis: 53%.
- Inverness/East Highland/Moray: 18%.
- Wester Ross: 8%.
- Harris: 5%.

For those living in the Outer Hebrides, the most popular mainland trip end was Inverness/East Highland/Moray. This was cited by more than half (59%) of the relevant respondents. The other main areas were Wester Ross and Aberdeen. Each was mentioned by 13% of island residents.

For non-residents of the Outer Hebrides, the most popular mainland trip ends were:

- Wester Ross: 38%.
- Inverness/East Highland/Moray: 29%.

In addition, Harris was mentioned by 10%, indicating that a number of visitors are travelling to/from that island via the Lewis ferry service.

Over three quarters (78%) of passengers were **using the Ullapool-Stornoway ferry service in both directions** for their trip to/from the islands. A number of other ferry services were also being used to travel to, from or within the Outer Hebrides. The main ones mentioned were:

- Uig-Tarbert: 11% of the entire sample.
- Sound of Harris: 5%.

Around three quarters (76%) of passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. A further 11% travelled by Scheduled Bus and 7% had Walked.

A majority (63%) of those using a Private Vehicle **accompanied it on the ferry crossing**. This indicates that just over half (52%) were travelling on board as **foot passengers**. Of those who did not accompany the vehicle on the sailing, a large proportion (89%) had received a lift.

For the majority of passengers the most common mode of transport for **onward travel from the destination ferry terminal** was Private Vehicle. This was reported by 74% of respondents. The main other modes were: Scheduled Bus (14%); and Walk (6%).

In terms of **frequency of use**, Outer Hebrides residents make an average (mean) of nine return trips per year on the Ullapool-Stornoway service. Most (69%) make between two and seven return trips. 62% of those resident elsewhere had made no other trips on the route in the past 12 months.

Almost all (94%) of those travelling with a vehicle on the crossing had **booked in advance**. The average (mean) number of days in advance was fourteen. 31% had booked over a fortnight ahead, while a similar proportion (30%) had booked less than 48 hours before the sailing.

Less than half (45%) the passengers were aware of **an alternative ferry crossing** that could have been used for the trip they were making to/from the Outer Hebrides. Almost all (92%) of these respondents identified Uig-Tarbert in this regard. The main reasons for **choosing to use the Ullapool-Stornoway service** were:

- Location of ferry terminals is more suitable: 37%.
- Shorter overall journey time: 25%.

Over three quarters (79%) of passengers were aware of **a scheduled air service** that could have been used for the trip they were making to/from the Outer Hebrides. The main air routes identified were:

- Inverness-Stornoway: 62% of relevant respondents.
- Glasgow-Stornoway: 24%.
- Edinburgh-Stornoway: 14%.

The main reasons for **choosing to use the Ullapool-Stornoway ferry service rather than flying** were:

- Convenience of travelling with one's own vehicle: 42%.
- Lower fares: 22%.

### 3.5.2 Uig-Tarbert

Around 30% of passengers were **residents** of the Outer Hebrides. Over half (54%) of them lived in Lewis with a further 21% residents of Harris. The main places of residence of those living outside the Outer Hebrides were:

- Outside Scotland: 28%.
- Skye: 9%.

Interviewees' main **trip purposes** were:

- Holiday/Short Break: 51%.
- VFR: 21%.
- Employer's Business: 14%.

Holiday/Short Break was the main trip purpose of Outer Hebrides residents. This was reported by 42%, with a further 25% travelling on Personal Business. Residents of Skye were travelling for either VFR (71%) or Employer's Business (29%) purposes.

The vast majority (85%) of passengers were making a trip that involved **an overnight stay away from home**. A further 7% were making a **day trip while staying away from home**.

The most popular trip **origins** on the day of travel were:

- Skye: 37%.
- Lewis: 26%.
- Harris: 12%.

The main **destinations** on the day of travel were:

- Lewis: 25%.
- Harris: 22%.
- Skye: 14%.

For island residents the most popular trip ends outside the Outer Hebrides were: Skye (48%); and Inverness/East Highland/Moray (24%).

For those living outside the Outer Hebrides the main trip ends outside the islands were: Skye (51%); and Glasgow/Renfrewshire (10%).

Less than three quarters (73%) of passengers were using the Uig-Tarbert service **in both directions** for their trip to/from the Outer Hebrides. A number of other ferry services were also being used to travel to, from or within the Outer Hebrides.

The main ones mentioned were:

- Uig-Lochmaddy: 11% of the entire sample.
- Ullapool-Stornoway: 10%.

Almost all (93%) of passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. A further 6% travelled by Scheduled Bus. The great majority (82%) of those using a Private Vehicle **accompanied it on the ferry crossing**. This indicates that around one quarter (24%) were travelling on board as **foot passengers**. Of those who did not accompany the vehicle on the sailing, 62% had left their vehicle at the ferry terminal while 38% received a lift.

For the vast majority (90%) of passengers Private Vehicle was the mode of transport used for **onward travel from the destination ferry terminal** was. A further 4% were travelling by Scheduled Bus.

In terms of **trip frequency** on this route, Outer Hebrides residents make an average (mean) of eight return trips per annum on the Uig-Tarbert service. For residents of Harris this increases to twelve.

Of those living elsewhere, 60% had made no other trips on the Uig-Tarbert service in the last year, with a further 26% making 2-4 return trips in the last 12 months.

Almost all (94%) of those accompanying a vehicle on the ferry had **booked in advance**. The average (mean) number of days for advance booking was thirteen. 28% had booked more than a fortnight ahead, while the same proportion had booked no further than 48 hours before the sailing.

60% of passengers considered that there was **an alternative ferry service** that could have been used for the trip they were making to/from the Outer Hebrides. The main one identified was Ullapool-Stornoway (84% of relevant respondents). The main reasons for **choosing to use the Uig-Tarbert service** were:

- Location of ferry terminals is more suitable: 27%.
- Shorter overall journey time: 24%.
- Shorter sea crossing: 22%.

44% of residents of Lewis chose the Tarbert ferry service because it offers a shorter sea crossing. A further 22% stated that the location of ferry terminals is more suitable.

Over half (56%) the interviewees were aware of **a scheduled air service** that could have been used for the trip they were making to/from the Outer Hebrides. The main air routes identified were:

- Glasgow-Stornoway: 38% of relevant respondents.
- Inverness-Stornoway: 31%.

The main reasons for **choosing to use the Uig-Tarbert ferry service rather than flying** were:

- Convenience of travelling with one's own vehicle: 51%.
- Lower fares: 13%.

### 3.5.3 Uig-Lochmaddy

In terms of **place of residence**, 28% of passengers on the Uig-Lochmaddy service were residents of the Outer Hebrides. There was a wide distribution of place of residence within the Southern Isles as follows:

- North Uist: 32%.
- South Uist: 32%.
- Benbecula: 26%.
- Barra: 11%.

The main other places of residence among the survey sample were:

- Outside Scotland: 23% of the entire sample.
- Skye: 10%.
- Inverness/East Highland/Moray: 7%.

Interviewees' main **trip purposes** were:

- Holiday/Short Break: 43%.
- VFR: 23%.
- Employer's Business: 14%.

Reflecting, in part, the ferry service's timetable, the vast majority (94%) of respondents were undertaking a trip which involved **an overnight stay away from home**.

The most popular trip **origins** on the day of travel were:

- Skye: 20%.
- North Uist/Berneray: 17%.
- South Uist: 14%.
- Benbecula: 12%.

4% had commenced their trip on Barra.

The main **destinations** on the day of travel were:

- North Uist/Berneray: 20%.
- Skye: 14%.
- South Uist: 10%.
- Benbecula: 10%.

3% were destined for Barra.

For Outer Hebrides residents the main trip ends outside the islands, each of which was identified by 16% of relevant respondents, were:

- Glasgow/Renfrewshire.
- Fife/Clackmannanshire/Stirling/Perth & Kinross.
- Lochaber.
- Skye.

For those living elsewhere the main trip ends outside the Outer Hebrides were:

- Skye: 37%.
- Inverness/East Highland/Moray: 12%.

Three quarters (75%) of passengers were using the Uig-Lochmaddy service **in both directions** for their trip to/from the Outer Hebrides. A number of other ferry services were also being used to travel to, from or within the Outer Hebrides. The main ones mentioned were:

- Oban-Lochboisdale: 7% of the entire sample.
- Oban-Barra: 6%.
- Uig-Tarbert: 6%.

Almost all (96%) passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. A further 3% travelled by Scheduled Bus. The great majority (88%) of those using a Private Vehicle **accompanied it on the ferry crossing**. This indicates that around one in six (16%) interviewees were travelling on board as **foot passengers**. Of those who did not accompany the vehicle on the sailing, 75% had left their vehicle at the ferry terminal while 25% received a lift.

For the vast majority (94%) of passengers Private Vehicle was the mode of transport used for **onward travel from the destination ferry terminal**. A further 4% were travelling by Scheduled Bus.

In terms of **trip frequency** on this route, Outer Hebrides residents make an average (mean) of nine return trips per annum. Of those living elsewhere, one half had made no other trips on the Lochmaddy service in the last year, with a further 34% making 2-4 return trips in the last 12 months.

Almost all (93%) of those accompanying a vehicle on the ferry had **booked in advance**. The average (mean) number of days for advance booking was eleven. 16% had booked more than a fortnight ahead, while almost two thirds (64%) had booked between three and fourteen days before the sailing.

Around two thirds (65%) of the passengers considered that there was **an alternative ferry service** that could have been used for the trip they were making to/from the Outer Hebrides. The main one identified was Oban-Lochboisdale (71% of relevant respondents). The main reasons for **choosing to use the Uig-Lochmaddy service** were:

- Shorter sea crossing: 36%.
- Shorter overall journey time: 16%.
- Timings of sailings more suitable: 13%.

Almost three quarters (74%) of passengers were aware of a **scheduled air service** that could have been used for the trip they were making to/from the Outer Hebrides. The main air routes identified were:

- Glasgow-Benbecula: 45% of relevant respondents.
- Inverness-Benbecula: 24%.

The main reasons for **choosing to use the Uig-Lochmaddy ferry service rather than flying** were:

- Convenience of travelling with one's own vehicle: 67%.
- Lower fares: 14%.

#### 3.5.4 Oban-Lochboisdale

In terms of passengers' **place of residence**, around one in six (17%) were residents of the Outer Hebrides. The vast majority (81%) of them reside in South Uist, with a further 12% living on Barra. In terms of the sample as a whole, the main other places of residence were:

- Outside Scotland: 52%.
- Glasgow/Renfrewshire: 14%.

Interviewees' main **trip purposes** were:

- Holiday/Short Break: 58%. (25% for Outer Hebrides residents)
- VFR: 19%. (12%).

The most popular trip **origins** on the day of travel were:

- North Argyll: 37%.
- South Uist: 35%.

3% had commenced their trip from Barra.

The main **destinations** on the day of travel were:

- South Uist: 38%.
- North Argyll: 15%.
- Glasgow/Renfrewshire: 13%.
- North Uist: 10%.

For Outer Hebrides residents the main trip ends outside the islands were:

- North Argyll: 50%.
- Glasgow/Renfrewshire: 38%.

For those living elsewhere the main trip ends outside the Outer Hebrides were:

- North Argyll: 53%
- Outside Scotland: 14%.
- Glasgow/Renfrewshire: 13%.

Less than three quarters (71%) of passengers were using the Oban-Lochboisdale service **in both directions** for their trip to/from the Outer Hebrides. A further 24% were using/had used another ferry service to undertake the other leg of their trip to/from the islands, while 5% would be using a scheduled air service.

A number of other ferry services were also being used to travel to, from or within the Outer Hebrides. The main ones mentioned were:

- Uig-Lochmaddy: 15% of the entire sample.
- Ullapool-Stornoway: 6%.

Over three quarters (77%) of passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. 13% had Walked and 4% used Train. Around three in four (76%) of those using a Private Vehicle **accompanied it on the ferry crossing**. This indicates that 41% of interviewees were travelling on board as **foot passengers**. Of those who did not accompany the vehicle on the sailing, 47% had received a lift, while 41% had left their vehicle at the ferry terminal.

For 81% of passengers Private Vehicle was the mode of transport used for **onward travel from the destination ferry terminal**. 5% would Walk, while 4% would either use a Taxi or travel by Train.

In terms of **trip frequency** on the Oban-Lochboisdale route, Outer Hebrides residents make an average (mean) of six return trips per annum. Of those living elsewhere, 69% had made no other trips on the Lochboisdale service in the last year, while around one quarter (24%) had made 2-4 return trips in the last 12 months.

The vast majority (91%) of those accompanying a vehicle on the ferry had **booked in advance**. The average (mean) number of days for advance booking was just under 28. Most (62%) had booked more than a fortnight ahead, while almost half (48%) had booked more than four weeks before the day of sailing.

Around two thirds (64%) of the passengers considered that there was **an alternative ferry service** that could have been used for the trip they were making to/from the Outer Hebrides. The main one identified was Uig-Lochmaddy (95% of relevant respondents). The main reasons for **choosing to use the Oban-Lochboisdale service** were:

- Location of ferry terminals is more suitable: 47%.
- Shorter overall journey time: 23%.
- Will be using/had used other ferry service on other leg of trip: 12%.

Over three quarters (77%) of passengers were aware of a **scheduled air service** that could have been used for the trip they were making to/from the Outer Hebrides. The main air routes identified were:

- Glasgow-Benbecula: 83% of relevant respondents.
- Glasgow-Barra: 7%.

The main reasons for **choosing to use the Oban-Lochboisdale ferry service rather than flying** were:

- Convenience of travelling with one's own vehicle: 33%.
- Lower fares: 28%.

### 3.5.5 Oban-Castlebay

In terms of passengers' **place of residence**, around one in four (26%) were residents of the Outer Hebrides. Almost all (96%) of them live on Barra. In terms of the sample as a whole, the main other places of residence were:

- Outside Scotland: 31%.
- Glasgow/Renfrewshire: 13%.

Interviewees' main **trip purposes** were:

- Holiday/Short Break: 56%.
- VFR: 17%.
- Personal Business: 15%.

For Outer Hebrides residents the main trip purposes were: Personal Business (38%); and VFR (12%).

The most popular trip **origins** on the day of travel were:

- Barra: 32%.
- North Argyll: 22%.
- Glasgow/Renfrewshire: 11%.

5% had commenced their trip from South Uist.

The main **destinations** on the day of travel were:

- Barra: 60%.
- North Argyll: 14%.
- Glasgow/Renfrewshire: 10%.

3% of passengers had a trip destination within the Uists.

For Outer Hebrides residents the main trip ends outside the islands were:

- Glasgow/Renfrewshire: 38%.
- North Argyll: 25%.

For those living elsewhere the main trip ends outside the Outer Hebrides were:

- North Argyll: 40%.
- Glasgow/Renfrewshire: 14%.

Almost all (94%) passengers were using the Oban-Castlebay service **in both directions** for their trip to/from the Outer Hebrides. Just 4% were using/had used another ferry service to undertake the other leg of their trip to/from the islands, while 1% would be using a scheduled air service.

A number of other ferry services were also being used to travel to, from or within the Outer Hebrides. The main one mentioned was the Sound of Barra route (11% of the entire sample).

Over three quarters (81%) of passengers had used a Private Vehicle as their **mode of transport to the ferry terminal**. 6% had Walked, 4% had travelled by Scheduled Bus and 3% used Train.

Around three in four (76%) of those using a Private Vehicle **accompanied it on the ferry crossing**. This indicates that 38% of interviewees were travelling on board as **foot passengers**. Of those who did not accompany the vehicle on the sailing, 72% had received a lift, while 28% had left their vehicle at the ferry terminal.

For 85% of passengers Private Vehicle was the mode of transport used for **onward travel from the destination ferry terminal**. 5% would Walk, and 4% either use a Taxi or Cycle.

In terms of **trip frequency** on this route, Outer Hebrides residents make an average (mean) of seven return trips per annum. Of those living elsewhere, 60% had made no other trips on the Castlebay service in the last year, while over one in three (37%) had made 2-4 return trips in the last 12 months.

The vast majority (88%) of those accompanying a vehicle on the ferry had **booked in advance**. The average (mean) number of days for advance booking was sixteen. 36% had booked more than a fortnight ahead, while 24% had booked less than 48 hours before the day of sailing.

59% of the passengers considered that there was **an alternative ferry service** that could have been used for the trip they were making to/from the Outer Hebrides. The main one identified was Uig-Lochmaddy (60% of relevant respondents). The main reasons for **choosing to use the Oban-Castlebay service** were:

- Location of ferry terminals is more suitable: 45%.
- Shorter overall journey time: 30%.

Over three quarters (84%) of passengers were aware of a **scheduled air service** that could have been used for the trip they were making to/from the Outer Hebrides. The main air route identified was Glasgow-Barra (71% of relevant respondents).

The main reasons for **choosing to use the Oban-Castlebay ferry service rather than flying** were:

- Convenience of travelling with one's own vehicle: 45%.
- Lower fares: 16%.

### 3.6 ORKNEY

#### 3.6.1 Gills Bay-St Margaret's Hope (Pentland Ferries)

The most common **places of residence** of those using the Pentland Ferries service were:

- Orkney: 30%.
- Outside Scotland: 24%.
- Caithness & Sutherland: 12%.
- Inverness/East Highland/Moray: 10%.

In terms of **trip purpose**, over one in three (36%) were on a Holiday/Short-Break, with most of these passengers being on a Holiday. The main other trip purposes were: VFR (24%); and Personal Business (11%).

Only 9% were travelling for non-leisure purposes. This mainly consisted of Employer's Business (7% of total sample).

Orcadians' trip purposes were quite varied, with the main ones being:

- Personal Business: 23%.
- VFR: 17%.

For residents of Caithness & Sutherland, the main trip purposes were: VFR (32%); and Employer's Business (16%).

Over three quarters (78%) of respondents were on a trip that involved an **overnight stay away from home**. A further 8% were making a **day trip from home**.

The most popular trip **origins** on the day of travel were:

- Orkney: 51%.
- Caithness & Sutherland: 21%.
- Inverness/East Highland/Moray: 14%.

The main **destinations** on the day of travel were:

- Orkney: 48%.
- Inverness/East Highland/Moray: 19%.
- Caithness & Sutherland: 10%.

For those living on Orkney the most important mainland trip ends were:

- Inverness/East Highland/Moray: 41%.
- Caithness & Sutherland: 13%.
- Fife/Clackmannanshire/Stirling/Perth & Kinross: 11%.
- Outside Scotland: 11%.

For those living elsewhere the most important mainland trip ends were:

- Caithness & Sutherland: 38%.
- Inverness/East Highland/Moray: 30%.

The vast majority (88%) of passengers were using the Pentland Ferries service **in both directions** for their trip to/from Orkney. A further 9% would use/had used another ferry service-largely Northlink's Scrabster service. 2% would use/had used air for the other leg of their journey.

The vast majority (96%) of passengers used Private Vehicle as their **mode of transport to the ferry terminal**. Of these, 84% had **accompanied their vehicle on the ferry**, such that 19% of the sample were travelling as **foot passengers** on the service. Of those who did not accompany the vehicle on the sailing, 55% had left it at the ferry terminal, while 41% had received a lift.

For the vast majority (94%) of passengers the most common mode of transport for **onward travel from the destination ferry terminal** was Private Vehicle. 3% would be travelling by Taxi.

In terms of **frequency of use**, Orcadians make an average (mean) of seven return trips per year with Pentland Ferries. Only 17% use the service more than once every four weeks.

Of those resident elsewhere, two thirds (67%) had made no other trips on this service in the past 12 months. Those living in Caithness & Sutherland use the service on average (mean) six times per year.

Almost all (95%) of those travelling with a vehicle had **made a booking in advance**. The mean number of days in advance was fourteen, although 29% booked less than three days before their sailing.

Practically all (97%) respondents were aware of an **alternative ferry service** that could have been used for their trip to/from Orkney. Northlink was seen as the main alternative-cited by 90% of relevant respondents, with 15% referring to the John O'Groats-Burwick service. The main reasons for **choosing the Pentland Ferries service** were:

- Lower fares: 27%.
- Sailing times were more suitable: 19%.
- Location of ferry terminals more suitable: 13%.

The main reasons given by Orcadians were:

- Sailing times were more suitable: 38%.
- Location of ferry terminals more suitable: 19%.
- Shorter overall journey time: 15%.

A high proportion (87%) of passengers were aware that **a scheduled air service** could have been used to make their trip to/from Orkney. The main reasons given for **using the Pentland Ferries' service rather than flying** were:

- Convenience of travelling with one's own vehicle: 63%.
- Lower fares: 21%.

### 3.6.2 Scrabster-Stromness (Northlink)

The most common **places of residence** of those using the Scrabster service were:

- Orkney: 40%.
- Outside Scotland: 29%.
- Inverness/East Highland/Moray: 7%.
- Caithness & Sutherland: 5%.

In terms of **trip purpose**, over one in three (35%) were on a Holiday/Short-Break, with most being on a Holiday. The main other trip purposes were: VFR (19%); Employer's Business (12%); and Personal Business (11%).

Orcadians' main trip purposes were:

- Holiday/Short-Break: 26%.
- VFR: 20%.
- Personal Business: 10%.

A clear majority (83%) of passengers were making a trip which involved an **overnight stay away from home**. A further 7% were making a **day trip from home**.

The most popular trip **origins** on the day of travel were:

- Orkney: 59%.
- Caithness & Sutherland: 24%.
- Inverness/East Highland/Moray: 13%.

The main **destinations** on the day of travel were:

- Orkney: 42%.
- Inverness/East Highland/Moray: 20%.
- Caithness & Sutherland: 9%.

For those living on Orkney the most important mainland trip ends were:

- Inverness/East Highland/Moray: 47%.
- Caithness & Sutherland: 26%.
- Edinburgh/Lothian/Borders: 10%.

For those living elsewhere the most important mainland trip ends were:

- Caithness & Sutherland: 38%.
- Inverness/East Highland/Moray: 24%.
- Aberdeen/Aberdeenshire: 9%.

The vast majority (86%) of passengers were **using the Scrabster service in both directions** on their trip to/from Orkney. Some 10% were using another ferry services on one of their journey legs, while 2% were using a scheduled air service on one of the legs. Of those using another ferry service, 60% were travelling between Aberdeen and Kirkwall and a further 27% with Pentland Ferries.

The vast majority (90%) of passengers used Private Vehicle as their **mode of transport to the ferry terminal**. Of the remainder, 4% had travelled by Taxi, 3% by Scheduled Bus and 1% had used the Train.

Just over three quarters (76%) of those arriving by Private Vehicle had **accompanied the vehicle** on the ferry. Of those who had not travelled with the vehicle on the boat, most (63%) had received a lift, while just over one in three (34%) had left their vehicle at the terminal. On this basis, 32% of interviewees were travelling as **foot passengers** on the ferry.

For their **onward travel from the destination ferry terminal** a clear majority (80%) would be using Private Vehicle. Around one in eight (12%) would travel by Scheduled Bus; 4% would Walk; 2% would take a Taxi; and 1% would use the Train.

In terms of **trip frequency**, Orcadians use the service at an average (mean) of eight return trips per year. Only 10% use the service more than once every four weeks. Of those living outside Orkney, almost three quarters (74%) had made no other trips on the service in the past 12 months.

Of those accompanying their vehicle on the ferry, 89% had **booked in advance**. The mean number of days for booking in advance was thirteen. Over one in three (37%) had booked less than three days before travel, while one in six (17%) had made a booking at least four weeks ahead.

89% of respondents were aware of **another ferry service** that could have been used for their journey to/from Orkney. The most common references were to:

- Pentland Ferries: 74% of relevant respondents.
- John O' Groats-Burwick: 9%.

The most common reasons given for **choosing to use the Scrabster service** were:

- Location of ferry terminals more suitable: 33%.
- Timings of sailings more suitable: 15%.
- Lower fares: 9%.

87% of interviewees were **aware of an air service** that could have been used to make the trip to/from Orkney. The main reasons given for **choosing to use the Scrabster ferry service** were:

- Convenience of travelling with own car: 52%.
- Lower fares: 28%.

### 3.6.3 Aberdeen-Kirkwall (Northlink)

In terms of **place of residence**, Orcadians accounted for a majority (62%) of those interviewed on this service. The main other places of residence were: Outside Scotland (14% of respondents); and Aberdeen/Aberdeenshire (also 14%).

Interviewees' main **trip purposes** were:

- VFR: 29%.
- Holiday/Short Break: 27%.
- Personal Business: 13%.

68% of passengers were undertaking a trip that **involved an overnight stay**, with 30% making a **day trip** using the service.

The most popular trip **origins** on the day of travel were:

- Aberdeen/Aberdeenshire: 47%.
- Outside Scotland: 17%.
- Edinburgh/Lothian/Borders: 13%.

All interviews were undertaken on sailings from Aberdeen and, therefore, all trip **destinations** were within Orkney.

85% of interviewees were **using the Aberdeen-Kirkwall service for both legs** of their trip to/from Orkney. A further 13% were using another ferry service for one of the legs, while 2% were using a scheduled air service. The main other ferry routes being used were:

- Scrabster-Stromness: 64% of relevant respondents.
- Gills Bay-St Margaret's Hope: 18%.

A relatively low proportion (55%) of passengers had used Private Vehicle as their **mode of transport to the ferry terminal at Aberdeen**. The main other modes used were:

- Walk: 16%.
- Train: 12%.
- Scheduled Bus: 11%.
- Taxi: 11%.

Less than half (42%) of those that arrived at the ferry terminal by Private Vehicle **accompanied the vehicle on the ferry**. Of those who did not travel with the vehicle on board the ship, the vast majority (81%) had received a lift to the ferry terminal at Aberdeen. In total, 77% of passengers were travelling on the Aberdeen-Kirkwall service as **foot passengers**.

For their **onward travel from the Kirkwall ferry terminal**, just over three quarters of passengers (76%) would be using a Private Vehicle. A further 12% would be travelling by Taxi.

In terms of **frequency of service**, Orkney residents use the Aberdeen service approximately once every two months. Only 5% travel the route more than once every four weeks.

Of those living outside Orkney, over half (58%) had made no other trips on the service in the past 12 months. Only 6% had made more than nine return ferry trips between Aberdeen and Kirkwall during that time.

86% of passengers had **made a booking on the service**. Few (10%) had booked more than four weeks before the sailing and 20% had booked less than 24 hours before the sailing. The mean number of days for booking in advance was eleven.

Every passenger that was **accompanying a vehicle** on the ferry had **booked in advance**. They tended to book earlier than passengers in general; with, for example, 64% having booked over a week before the day of sailing, compared to 39% for the sample as a whole.

Only 33% considered that there was **another ferry service** that could have been used for their trip to/from Orkney. Of these passengers, 72% referred to the Scrabster service and 48% to Pentland Ferries. A wide range of reasons were given for **choosing to use the Aberdeen-Kirkwall service**. The main ones were:

- Timings of sailings more suitable: 17%. (31% for Orkney residents)
- Location of ferry terminals more suitable: 17%.

87% of respondents were aware of **a scheduled air service** that could have been used for their trip to/from Orkney. Lower fares was clearly the main reason for **choosing to sail on the Aberdeen-Kirkwall service rather than fly**. This was cited by 70% of interviewees, with a further 15% referring to the convenience of travelling with one's own car.

Respondents were also asked to comment on a number of issues regarding **the mainland port used for the ferry service to Kirkwall.**

**Table 3.1** shows that Aberdeen is the clearly preferred port.

**TABLE 3.1: WHICH OF THE FOLLOWING MAINLAND PORTS WOULD HAVE BEEN MOST SUITABLE FOR THE TRIP YOU ARE MAKING TODAY?**

Port	All Interviewees	Orkney Residents
<b>Aberdeen</b>	85%	90%
<b>Rosyth</b>	14%	10%
<b>Peterhead</b>	1%	0%

Base: All respondents

It was chosen by 85% of the sample and 90% of Orcadians. While there was some support for Rosyth (chosen by around one in seven of all interviewees) there was almost none for Peterhead.

**Table 3.2** shows that, of those who believe Aberdeen would be the most suitable port, a clear majority (74%) stated that this would still be the case even if other locations enabled the operation of a larger vessel with more cabins and offering a more comfortable passage in rough weather.

**TABLE 3.2: IF USING A MAINLAND PORT OTHER THAN ABERDEEN ALLOWED LARGER VESSELS ON THE ROUTE WHICH COULD PROVIDE MORE CABINS AND WERE MORE COMFORTABLE IN ROUGH WEATHER, WOULD YOU STILL PREFER ABERDEEN TO BE THE MAINLAND PORT FOR THIS SERVICE?**

Port	All Interviewees	Orkney Residents
<b>Yes</b>	74%	70%
<b>No</b>	15%	17%
<b>Don't Know</b>	11%	13%

Base: Those stating that Aberdeen would be the most suitable for the trip being made today

Less than one in six (15%) stated that under this scenario, Aberdeen would **not** be their port of preference. Again, there is very little difference between the responses of the sample as a whole and those made by Orkney residents.

Those who answered "no" to the question shown at **Table 3.2** were asked to state which port would be preferred to Aberdeen under the scenario of larger vessels on the Kirkwall service. The responses were:

- Rosyth: 58%.
- Peterhead: 25%.
- Neither: 8%.
- Don't Know: 8%.

Under existing conditions, 85% of the sample stated Aberdeen would have been most suitable for the trip they were making at the time of interview. However, if an alternative port could provide a superior service in terms of cabin capacity and smoothness of sea crossing, passengers' preferred port would be:

- Aberdeen: 63%.
- Rosyth: 21%.
- Peterhead: 4%.
- None of the above: 1%.
- Don't Know: 10%.

#### 3.6.4 John O' Groats-Burwick (Thomas & Bews: Passenger Only Service)

The most significant **places of residence** for passengers using the John O'Groats service were:

- Outside Scotland: 56%.
- Orkney: 19%.
- Inverness/East Highland/Moray: 8%.

Holiday/Short Break was the most popular **trip purpose**. This was reported by over half (53%) of the respondents. The main other purpose was VFR (24%) which was also the most common trip purpose among Orcadians (33%).

Most (59%) passengers were on a trip that involved **an overnight stay away from home**. Of the remainder, 25% were making a **day trip while staying away from home**.

The most popular trip **origins** on the day of travel were:

- Inverness/East Highland/Moray: 35%.
- Orkney: 32%.
- Caithness & Sutherland: 17%.

The main **destinations** on the day of travel were:

- Orkney: 57%.
- Inverness/East Highland/Moray: 19%.
- Caithness & Sutherland: 13%.

For those living on Orkney the most important mainland trip ends were:

- Inverness/East Highland/Moray: 50%.
- Caithness & Sutherland: 25%.

For those living elsewhere the most important mainland trip ends were:

- Inverness/East Highland/Moray: 48%.
- Caithness & Sutherland: 28%.

80% of passengers were using the John o' Groats service for **both legs of their trip** to/from Orkney. A further 10% would use/had used another ferry route.

Scheduled Bus was the main **mode of transport to the ferry terminal**. This was used by two-thirds (67%) of passengers, with 24% arriving by Private Vehicle. Of those who used the latter, half had received a lift while half left the vehicle at the terminal.

For their **onward travel from the destination ferry terminal** a clear majority (75%) would be using Scheduled Bus, with 21% travelling by Private Vehicle.

**Frequency of use** of the John O' Groats service was low, reflecting the high proportion of visitors travelling on it, as well as its seasonal operation. 83% had made no other trips on the service in the past 12 months, while just 2% had made more than thirteen return journeys over that period.

Approaching three quarters (73%) of passengers had **made a booking for the service**. The average (mean) number of days in advance was fourteen. However, most (62%) passengers had booked no more than a week before the sailing.

Over two thirds (68%) of passengers were aware of **an alternative ferry service** that could have been used for their trip to/from Orkney. The main ones identified were:

- Gills Bay-St Margaret's Hope: 51% of relevant respondents.
- Scrabster-Stromness: 47%.

The main reasons given for **choosing to use the John o' Groats service** were:

- Timings of sailings more suitable: 28%.
- Fit with public transport connections: 14%.
- Lower fares: 12%.

83% of passengers were aware of **a scheduled air service** that could have been used to make their trip to/from Orkney. The main ones referred to were those to/from:

- Inverness: 33% of relevant respondents.
- Glasgow: 21%.
- Aberdeen: 21%.

Lower cost of fares was the main reason given for **choosing to use the ferry service rather than fly**. This was cited by 67% of respondents.

## 3.7 SHETLAND

### 3.7.1 Lerwick-Aberdeen

55% of those interviewed **have their home, or are usually resident, in Shetland**. Of the others, over half (57%) live elsewhere in Scotland. Among the sample as a whole, 19% live outside Scotland and a further 8% in Aberdeen.

The main **trip purposes** were:

- Holiday/Short Break: 30%.
- VFR: 25%.
- Personal Business: 20%.
- Employer's Business: 9%.

In total, around one in seven (14%) passengers were travelling for non-leisure purposes. The figure (4%) for Shetland residents was much lower.

All interviewees were surveyed on ex Aberdeen sailings. The main trip **origins** were:

- Aberdeen: 30%.
- Outside Scotland: 21%.
- Glasgow/Renfrewshire: 10%.

Shetland residents were more likely than the sample as a whole to have started their trip that day from Aberdeen and less likely to have started it from outside Scotland.

Very few (2%) passengers were travelling between the mainland and Shetland by **ferry service for one leg of their trip and by scheduled air service for the other leg.**

Private Vehicle was the most popular **mode of transport for travelling to Aberdeen ferry terminal.** This was reported by almost half (49%) of the passengers. Of those who used this mode, almost two-thirds (65%) accompanied the vehicle on board the ferry. Most of those who did not had received a lift to the ferry terminal at Aberdeen. In total, 68% of interviewees were travelling as **foot passengers** on the ferry.

The most popular other modes of transport to the terminal at Aberdeen were:

- Train: 15%.
- Scheduled Bus: 14%.
- Taxi: 14%.

**Travel onwards from Lerwick ferry terminal** was largely by Private Vehicle. This was reported by 81% of passengers. The next most popular mode of onward transport was Walk (10%).

In terms of **trip frequency**, Shetland residents make an average (mean) of 5-6 return trips per year on the service. Just 4% travel more than every four weeks. Of those living elsewhere, 50% had made no other trips on the Aberdeen-Lerwick service in the past 12 months.

Some 87% of passengers **booked in advance** of the sailing on which they were travelling. Of those who did book in advance, 15% made a booking less than 24 hours before departure; and 25% booked more than four weeks ahead. On average bookings were made just over two weeks before the day of departure.

Almost all (97%) of those accompanying a vehicle booked in advance; and tended to do so earlier than foot passengers. The main difference is that over one in three (35%) of the former booked more than 28 days in advance, compared to only 13% of the latter.

Some 87% of passengers stated that the route between Lerwick and Aberdeen was one where **a scheduled air service could have been used to make their trip**. These respondents reported the following reasons for **choosing to travel by ferry rather than by air**:

- Cost of fares: 46%.
- Convenience of accompanying one's own car: 17%.

Respondents were also asked to comment on a number of issues regarding **the mainland port used for the ferry service to Lerwick**. **Table 3.3** shows that Aberdeen is clearly viewed as the most suitable port for the trip being made.

**TABLE 3.3: WHICH OF THE FOLLOWING MAINLAND PORTS WOULD HAVE BEEN MOST SUITABLE FOR THE TRIP YOU ARE MAKING TODAY?**

Port	All Interviewees	Shetland Residents
<b>Aberdeen</b>	74%	74%
<b>Rosyth</b>	18%	20%
<b>Peterhead</b>	4%	2%
<b>Don't Know</b>	3%	4%

Base: All respondents

This was reported by almost three quarters (74%) of respondents. Rosyth was identified by over one in six (18%) passengers with very few identifying Peterhead. The results for Shetland residents are very close to those for the entire sample.

**Table 3.4** shows that, of those who believe Aberdeen would be the most suitable port, a clear majority (73%) stated that this would still be the case even if other locations enabled the operation of a larger vessel with more cabins and offering a more comfortable passage in rough weather.

**TABLE 3.4: IF USING A MAINLAND PORT OTHER THAN ABERDEEN ALLOWED LARGER VESSELS ON THE ROUTE WHICH COULD PROVIDE MORE CABINS AND WERE MORE COMFORTABLE IN ROUGH WEATHER, WOULD YOU STILL PREFER ABERDEEN TO BE THE MAINLAND PORT FOR THIS SERVICE?**

Port	All Interviewees	Shetland Residents
<b>Yes</b>	73%	75%
<b>No</b>	22%	20%
<b>Don't Know</b>	5%	5%

Base: Those stating that Aberdeen would be the most suitable for the trip being made today

Just over one in five (22%) stated that under this scenario, Aberdeen would **not** be their port of preference. Again, there is very little difference between the responses of the sample as a whole and those made by Shetland residents.

Those who answered "no" to the question shown at **Table 3.4** were asked to state which port would be preferred to Aberdeen under the scenario of larger vessels on the Lerwick service. The responses were:

- Rosyth: 63%.
- Peterhead: 31%.
- Don't Know: 6%.

Thus under existing conditions, 74% of the sample stated Aberdeen would have been most suitable for the trip they were making at the time of interview. If an alternative port could provide a superior service in terms of cabin capacity and smoothness of sea crossing, passengers' preferred port would be:

- Aberdeen: 54%.
- Rosyth: 29%.
- Peterhead: 9%.
- Don't Know: 8%.

### 3.7.2 Kirkwall-Lerwick

Most (73%) of those interviewed were residents of the Northern Isles. For the sample as a whole, the **home/usual place of residence** of respondents was:

- Orkney: 45%.
- Shetland: 28%.
- Elsewhere: 28%.

The **main trip purpose** was Holiday/Short Break (41%). The other main categories were: VFR (18%); and Personal Business (18%). In total, around one in seven (14%) passengers were travelling for non-leisure purposes.

Private Vehicle was the most popular **mode of transport to the ferry terminal**. This was reported by over two-thirds (68%) of respondents. Of those using this mode, almost three quarters (73%) accompanied the vehicle on board the ship. Of those who did not do so, most had left their vehicle at the ferry terminal, rather than having received a lift. In total, 50% of interviewees were travelling on the ferry as **foot passengers**.

The most common other means of reaching the ferry terminal was Taxi. This was reported by 27%.

**Travel onwards from the destination ferry terminal** was also largely through Private Vehicle which was used by 68% of respondents. The other main modes were: Walk (18%); and Scheduled Bus (9%).

In terms of **trip frequency**, the sample make an average (mean) of five return trips per year on the Kirkwall-Lerwick service. The average for Shetland residents is seven trips. Of those passengers who live outside the Northern Isles, none had made any other trips on the route in the past 12 months.

Almost all (91%) passengers had **booked in advance**. 30% made a booking less than 24 hours before departure; while one in four (25%) passengers booked more than four weeks before travelling.

Those accompanying a vehicle on the ferry tended to be booked earlier than foot passengers. The former booked, on average, three weeks in advance compared to six days among the latter.

Some 68% of passengers stated that the route between Lerwick and Kirkwall was one where **a scheduled air service could have been used to make their trip**. These respondents reported the following reasons for **choosing to travel by ferry rather than by air**:

- Cost of fares: 45%.
- Convenience of accompanying one's own car: 33%.

### 3.8 PASSENGERS' PLACE OF RESIDENCE

**Table 3.5**, over, contains information on the proportion of interviews that were undertaken with residents of the island/area served. These are shown for each of the August and November surveys, along with the combined results for both months. A degree of caution is required in interpreting the data for routes where only a limited number of interviews were undertaken (see **Chapter 2**).

**TABLE 3.5: PROPORTION OF INTERVIEWS UNDERTAKEN WITH LOCAL RESIDENTS**

Route	Residents Of...	Survey		
		Total	August	November
Gourock-Dunoon	Cowal/Helensburgh/Lomond	59%	54%	63%
Hunters Quay-McInroy's Point	Cowal/Helensburgh/Lomond	65%	63%	66%
Ardrossan-Brodick	Arran	37%	27%	48%
Claonaig-Lochranza	Arran	7%	7%	-
Largs-Cumbræ	Cumbræ	53%	54%	52%
Wemyss Bay-Rothesay	Bute	38%	22%	53%
Colintraive-Rhubodach	Bute	38%	31%	45%
Kennacraig-Islay	Islay & Jura	23%	13%	50%
Oban-Colonsay	Colonsay	15%	15%	14%
Oban-Craignure	Mull & Iona	35%	22%	47%
Oban-Coll/Tiree	Coll & Tiree	28%	25%	30%
Corran	Lochaber	50%	39%	64%
Mallaig-Armadale	Skye	8%	5%	15%
Oban-Castlebay	Outer Hebrides	26%	18%	41%
Oban-Lochboisdale	Outer Hebrides	17%	14%	57%
Uig-Lochmaddy	Outer Hebrides	28%	17%	48%
Uig-Tarbert	Outer Hebrides	30%	18%	48%
Ullapool-Stornoway	Outer Hebrides	30%	21%	45%
Gills Bay-St Margaret's Hope	Orkney	30%	17%	50%
Scrabster-Stromness	Orkney	40%	26%	60%
Aberdeen-Kirkwall	Orkney	62%	58%	69%
John O' Groats-Burwick	Orkney	19%	19%	-
Aberdeen-Lerwick	Shetland	55%	58%	53%
Kirkwall-Lerwick	Orkney & Shetland	73%	65%	100%

## 4 **FINDINGS: FREIGHT TRAFFIC-ON BOARD SURVEYS**

### 4.1 **INTRODUCTION**

This Chapter reports the main findings from the on-board surveys of freight traffic. In most cases, survey results have been analysed for routes where more than 15 interviews were achieved.

### 4.2 **COWAL**

#### 4.2.1 Hunters Quay-McInroy's Point (Western Ferries)

In terms of **vehicle size**, the vast majority (89%) were small vans of up to 7.5 tonnes gross weight.

Mean **vehicle length** was 5.5 metres. Just over half (52%) of the sample were up to and including 5m; with only 2% at or above 12m. In total, 94% of those interviewed stated that their vehicle was classified as a commercial vehicle by the ferry operator.

There was a wide range of **company locations** where the interviewee was based. Cowal/Helensburgh/Lomond was the main one. It accounted for just under one in four (24%) of the vehicles surveyed. The main other company locations were:

- Glasgow/Renfrewshire: 18%.
- Lanarkshire/Falkirk/Dunbartonshire: 14%.
- Inverclyde: 11%.

Other points of note are that, first, 8% of vehicles surveyed were operated by companies based in the HIE area outside Cowal. This was largely in Kintyre & Mid Argyll, but there were also vehicles located in North Argyll and on Bute. Second, 7% of vehicles were operated by companies based outside Scotland.

On the sailing where the interview took place, 15% of vehicles were **empty running**. Among the rest of the sample, the **main type of goods being moved** on the ferry at the time of interview were:

- Ambient/general goods: 75%.
- Chilled or frozen: 13%.
- Timber 2%.

Where empty running was recorded, interviewees had been/would be, in the main, carrying ambient/general goods on the **other leg of their journey**.

Some 9% of interviewees stated that load was or had been (where empty running on the ferry at the time of interview) **time sensitive**. For a majority (78%) the time window from the ferry to the drop off point was an hour or less. In more than half (55%) of cases the time window was less than or equal to 30 minutes.

For the **other leg of the trip** being made, 79% had either travelled outward, or would return on, the Western Ferries service. A further 11% would/did travel by road and/or bridge. 4% had used/would use another ferry service. The routes identified were the crossings to/from: Portavadie; Bute (both routes); and Cumbrae.

The most common **origins of the trip** being made were as follows:

- Cowal/Helensburgh/Lomond: 27%.
- Glasgow/Renfrewshire: 21%.
- Lanarkshire/Falkirk/Dunbartonshire: 20%.
- Inverclyde: 13%.

Only 3% of interviewees had commenced their trip in the HIE area outside Cowal. Very few (1%) vehicles had started from **an overnight location that was not the vehicle's base**. Similarly only 2% were undertaking **trips that would continue tomorrow** rather than returning to their base that night.

As might be expected, Cowal/Helensburgh/Lomond was the main **trip destination**. This was reported by more than half (60%) of respondents. There was quite a wide range of other destinations, with the most common being: Inverclyde (11%); and Glasgow/Renfrewshire (6%). Some 9% of vehicles has a destination within the HIE area outwith Cowal. The main ones were North Argyll and Cumbrae.

For operators based in Cowal/Helensburgh/Lomond, the main trip ends outside the peninsula were:

- Inverclyde: 33%.
- Lanarkshire/Falkirk/Dunbartonshire: 17%.
- South/East Ayrshire/Dumfries & Galloway: 17%.

For those based outside the peninsula the main non-Cowal/Helensburgh/Lomond trip ends were:

- Glasgow/Renfrewshire: 27%.
- Lanarkshire/Falkirk/Dunbartonshire: 22%.
- Inverclyde: 17%.

One in five (20%) vehicles were **dropping off/picking up goods en route**.

Interviewees made quite a high **frequency of use** of the Western Ferries service. Over half (51%) of interviewees are travelling more than weekly; and two thirds (66%) more than fortnightly. The average (mean) number of return trips per annum on the route was just under 50.

Almost all (98%) of interviewees were aware of an **alternative ferry service** that could have been used to make the journey they were undertaking via the Western Ferries service.

The main reasons for **choosing Western Ferries** were:

- Frequency of sailing: 28%.
- Lower cost of fares: 25%.
- Contract/company policy: 17%.
- Location of terminals: 8%.

Some 63% of respondents were aware of a **road/bridge alternative for accessing Cowal**. The main reason for **choosing the Western Ferries service** rather than a land-based route was that it produced an overall quicker journey. This was cited by 79% of relevant respondents.

#### 4.2.2 Gourock-Dunoon (CalMac)

In terms of **vehicle size**, over half (59%) of those surveyed were no greater than 7.5 tonnes gross weight. The remaining vehicles were largely a mixture of rigids and articulated vehicles.

Average (mean) **vehicle length** was slightly over 8m. 43% were up to and including 5 metres, while 19% were 12 metres or above. All respondents stated that their vehicles are classified by CalMac as commercial vehicles.

There was a wide range of **locations** where the interviewee's company was based. The main ones were:

- Glasgow/Renfrewshire: 28%.
- Cowal/Helensburgh/Lomond: 21%.
- Edinburgh/Lothian/Borders: 21%.

Approaching one in three (31%) vehicles were **running empty** on the ferry. Among the rest of the sample, the main types of goods being conveyed were:

- Ambient/general goods: 80%.
- Chilled or frozen: 10%.

For those whose vehicle was empty at the time of interview they had been/would be mainly running either ambient/general goods or chilled/frozen products on the **other leg of their journey**.

Few (17%) respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal varied from four to nine hours.

Two thirds (66%) of interviewees were using the Gourock-Dunoon service **in both directions** for the trip they were undertaking. A further 28% had used/would use road/bridge for the other journey leg, while 7% had used/would use another ferry service.

The main trip **origins** on the day of travel were:

- Cowal/Helensburgh/Lomond: 28%.
- Glasgow/Renfrewshire: 24%.
- Edinburgh/Lothian/Borders: 14%.

In all but 3% of cases this had been the trip's **actual starting point** rather than the location of an overnight stay.

The main trip **destinations** were:

- Cowal/Helensburgh/Lomond: 69%.
- Lanarkshire/Falkirk/Dunbartonshire: 10%.
- Fife/Clackmannanshire/Stirling/Perth & Kinross: 10%.

Cowal-based companies were mainly travelling to either Lanarkshire/Falkirk/Dunbartonshire; or Fife/Clackmannanshire/Stirling/Perth & Kinross.

Companies based elsewhere mainly had non-Cowal trip ends of either: Glasgow/Renfrewshire; or Edinburgh/Lothian/Borders.

14% were undertaking **trips that would continue the next day** rather than returning to their base that night.

Only 10% of vehicles were **dropping off/picking up goods en route**.

In terms of **frequency of use** of the CalMac Gourock-Dunoon service, the average (mean) number of return trips on the route was 25 per annum, although over one in three (38%) had made no other trips on the service in the past 12 months. All Cowal based vehicles use the service more than once per week.

Almost all (90%) interviewees were aware of **another ferry service** that could have been used to undertake the trip to/from Cowal. The main reasons given for **choosing to use CalMac's Gourock-Dunoon service** were:

- Company contract/policy: 35%.
- Lower fares: 12%.

Over half (59%) of the respondents were aware of **a road/bridge alternative** that could have been used for the trip they were making. The main reason for **choosing to use the Gourock-Dunoon sailing** rather than travelling by land was that it allows a quicker overall journey. This was cited by 82% of respondents.

## 4.3 NORTH AYRSHIRE

### 4.3.1 Largs-Cumbræ

In terms of **vehicle size**, over two thirds (68%) were up to and including 7.5 tonnes gross weight. Most of the remainder (18% of the sample) were rigid vehicles greater than 7.5 tonnes.

Average (mean) **vehicle length** was just under 7m. Over half (56%) were no longer than 5m, with only 8% 12m or above. Over two thirds (70%) of respondents stated that their vehicle is classified by CalMac as a commercial vehicle.

Less than one in four (18%) vehicles were based on Cumbrae. The main **company locations** among the interviewees were:

- North Ayrshire: 30%.
- Glasgow/Renfrewshire: 20%.

Only 8% of vehicles were **running empty** on the ferry. Among the rest of the sample, the main types of goods being conveyed were:

- Ambient/general goods: 51%.
- Chilled or frozen: 14%.
- Dangerous goods: 8%.

Around one in four (23%) respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal ranged between 15 minutes and two hours.

The main trip **origins** on the day of travel were:

- North Ayrshire: 30%.
- Glasgow/Renfrewshire: 25%.
- Cumbrae: 18%.

In all but 5% of cases the origin was the trip's **actual starting point** rather than the location of an overnight stay.

The main trip **destinations** were:

- Cumbrae: 78%.
- North Ayrshire: 10%.

For companies based on Cumbrae, the most popular mainland trip ends were: North Ayrshire (57%); and Glasgow/Renfrewshire (29%). For operators based elsewhere the most popular mainland trip ends were:

- North Ayrshire: 35%.
- Glasgow/Renfrewshire: 26%.

Only 10% of vehicles were **dropping off/picking up goods en route**.

13% were undertaking **trips that would continue the next day** rather than returning to their base that night.

In terms of **frequency of use**, the average (mean) number of return trips per annum on the Largs-Cumbrae service is 38. All Cumbrae-based vehicles use the service more than once per week.

#### 4.3.2 Ardrossan-Brodick

In terms of **vehicle size**, over half (58%) were up to and including 7.5 tonnes gross weight. 18% of the sample were rigid vehicles of over 7.5 tonnes and a further 9% were articulated.

Average (mean) **vehicle length** was 8m. 30% were up to and including 5m, while 18% were 12m or above. 91% stated that CalMac classify their vehicle as a commercial vehicle.

Arran was the main **company location** of the vehicles surveyed. This was the case for 39% of the sample. The other main locations were: South/East Ayrshire/Dumfries & Galloway; and Glasgow/Renfrewshire (18% each).

Only 6% of vehicles were **running empty** on the ferry. Among the rest of the sample, the **main types of goods being conveyed** were:

- Ambient/general goods: 68%.
- Chilled: 10%.
- Timber: 6%.

Around one in three (30%) respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal ranged from 45 minutes to 12 hours.

88% stated that they would definitely be using the Ardrossan-Brodick service in **both directions** for their trip to/from Arran.

The main trip **origins** on the day of travel were:

- Arran: 33%.
- Glasgow/Renfrewshire: 21%.
- South/East Ayrshire/Dumfries & Galloway: 21%.

In 27% of cases the origin had been the **location of an overnight stay** rather than the trip's actual starting point.

The main trip **destinations** were:

- Arran: 64%.
- Glasgow/Renfrewshire: 15%.
- South/East Ayrshire/Dumfries & Galloway: 12%.

For companies based on Arran the most popular mainland trip ends were: South/East Ayrshire/Dumfries & Galloway (46%); and Glasgow/Renfrewshire (23%).

For those not based on the island the main trip ends were: Glasgow/Renfrewshire (43%); and South/East Ayrshire/Dumfries & Galloway (24%).

Thus movements of freight **to** Arran are likely to originate from the Glasgow/Renfrewshire area; while those **from** Arran tend to have a destination in Ayrshire.

12% of vehicles were **dropping off/picking up goods en route**.

12% were undertaking **trips that would continue the next day** rather than returning to their base that night.

In terms of **frequency of use**, the average (mean) number of return trips per annum on the Ardrossan-Brodick service is 31. All Arran-based vehicles use the service more than once per week, while those based on the mainland use it much less frequently.

Almost all (94%) of vehicles had **booked in advance**. Only 6% of interviewees had advance block bookings. Of those without access to this facility, around one in three (32%) had booked between 3 and 7 days ahead of the sailing.

#### 4.4 ARGYLL & BUTE

##### 4.4.1 Wemyss Bay-Rothesay

In terms of **vehicle size**, almost three quarters (73%) were up to and including 7.5 tonnes gross weight. The other main vehicle type (18% of the sample) was rigid of more than 7.5 tonnes.

Average (mean) **vehicle length** was slightly over 6 metres. 41% were up to and including 5m long, while only 5% were greater than 10m. Just over three in four (77%) respondents stated that their vehicle was classified as a commercial vehicle by the ferry operator.

The main **company locations** of those surveyed were:

- Glasgow/Renfrewshire: 41%.
- Outside Scotland: 18%.
- Edinburgh/Lothian/Borders: 14%.

Only 9% of operators were based on Bute.

5% of vehicles were **running empty** at the time of survey. Among the rest of the sample, the **main types of goods** being conveyed were ambient/general goods, reported by 76%.

41% of respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal ranged from 45 minutes to 7 hours.

The main trip **origins** on the day of travel were:

- Glasgow/Renfrewshire: 45%.
- Bute: 14%.

In almost all (91%) cases the origins had been the been the trip's **actual starting point** rather than the location of an overnight stay.

The main trip **destinations** were:

- Bute: 86%.
- North Ayrshire: 9%.

Thus the most popular trip ends outwith Bute were:

- Glasgow/Renfrewshire: 45%.
- North Ayrshire: 14%.

Only 9% of vehicles were **dropping off/picking up goods en route**.

5% were undertaking **trips that would continue the next day** rather than returning to their base that night.

In terms of **frequency of use**, the average (mean) number of return trips per annum on the Wemyss-Bay Rothesay service is 20. All Bute-based vehicles use the service more than once per week. Among those located on the mainland the highest frequency of use was by those based in: Glasgow/Renfrewshire; and Edinburgh/Lothian/Borders.

Only 18% of interviewees considered that **another ferry service** could have been used to undertake the trip to/from Bute. The main reasons given for **choosing to use the Wemyss-Bay Rothesay route** were: location of ferry terminals; and not having enough information about the other ferry service.

#### 4.4.2 Colintraive-Rhubodach

In terms of **vehicle size**, over half (57%) were up to and including 7.5 tonnes gross weight. The main other type was articulated vehicle (22%).

Average (mean) **vehicle length** was 8.8 metres. 13% were up to and including 5m long, while the same amount were 12m or above. 78% of respondents stated that their vehicle was classified as a commercial vehicle by the ferry operator.

The main **company locations** of those surveyed were:

- Kintyre/Mid Argyll: 35%.
- Glasgow/Renfrewshire: 17%.

Only 4% of those surveyed were based on Bute. In total, over half (56%) of the respondents were based in the HIE area.

17% of vehicles were **running empty** on the ferry. Among the rest of the sample, the main types of goods being conveyed were:

- Ambient/general goods: 68%.
- Dangerous goods: 11%.

Around one in three (30%) respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal ranged between 15 minutes and 3 hours.

Just over one in four (26%) interviewees were **using another ferry service** in conjunction with the Colintraive-Rhubodach route to undertake their journey to/from Bute. In most cases this was Wemyss-Bay Rothesay (used by 13% of the entire sample), but use was also made of the two Cowal-Inverclyde services.

The main trip **origins** on the day of travel were:

- Bute: 26%.
- Kintyre/Mid Argyll: 22%.
- Glasgow/Renfrewshire: 17%.

The main trip **destinations** were:

- Bute: 61%.
- Cowal/Helensburgh/Lomond: 22%.

Over one in four (26%) of vehicles were **dropping off/picking up goods en route**.

43% were undertaking **trips that would continue the next day** rather than returning to their base that night.

In terms of **frequency of use**, the average (mean) number of return trips per annum on the Colintraive-Rhubodach service is 44. The highest frequency of usage is by vehicles based in: Kintyre/Mid Argyll; Cowal; and Bute-generally more than one trip per week.

Only 17% of interviewees considered that **another ferry service** could have been used to undertake the trip to/from Bute. The main reasons given for **choosing to use the Colintraive-Rhubodach route** service were: lower fares; and shorter overall journey time.

#### 4.4.3 Oban-Craignure

In terms of **vehicle size**, slightly over one in three (37%) were up to and including 7.5 tonnes gross weight. A further 26% were rigid vehicles of greater than 7.5 tonnes, with a further 20% being a vehicle/trailer combination. 11% were articulated.

The average (mean) **vehicle length** was 9m. Just over one quarter (26%) were up to 5m long, with almost the same amount (24%) being 12m or above. 97% of interviewees stated that their vehicle was classified as a commercial vehicle by the ferry operator.

The main **company location** was North Argyll (43% of respondents), with 29% of the vehicles surveyed based on Mull. In total, 80% of the vehicles were based in the HIE area.

Over one in four (26%) vehicles was **running empty** while on the ferry. Among the rest of the sample, the main types of goods being conveyed were:

- Ambient/general goods: 54%.
- Livestock: 19%.
- Chilled or frozen: 12%.

For those whose vehicle was empty at the time of interview they had been/would be mainly running chilled or frozen products on the **other leg of their journey**.

Around one in six (17%) respondents considered that their load was (or had been where empty running on the ferry at the time of interview) **time sensitive**. The time window for delivery after leaving the ferry terminal ranged between three and six hours.

Almost all (94%) of respondents were using the Oban-Craignure service **in both directions** for their trip to/from Mull, with 6% using another ferry service for one of the legs.

The main trip **origins** on the day of travel were:

- North Argyll: 57%.
- Mull: 29%.

In all but 3% of cases the origins were the trip's **actual starting point** rather than the location of an overnight stay.

The main trip **destinations** were:

- Mull: 57%.
- North Argyll: 29%.

Almost all (91%) companies based on Mull were travelling to/from North Argyll rather than further afield.

Only 6% were undertaking **trips that would continue the next day** rather than returning to their base that night.

14% of vehicles were **dropping off/picking up goods en route**.

In terms of **frequency of use**, the average (mean) number of return trips per annum on the Oban-Craignure service is 38. The figure for Mull based vehicles (35) is slightly below this average and is also less than that (54) for vehicles based in North Argyll. 60% of the latter use the Craignure service more than once per week.

The vast majority (91%) of vehicles had **booked in advance**. Of those using the service almost half (47%) had advance block bookings. Of those who did not have access to this facility most (40%) booked three to seven days ahead.

Just over half (51%) of the respondents considered that there was an **alternative ferry service** that could have been used for the trip they were making to/from Mull. The most common reference was to the Fishnish-Lochaline service. The **main reasons for choosing to use the Oban-Craignure service** were:

- Shorter overall journey time: 56% of relevant respondents.
- Location of ferry terminals more suitable: 33%.

## 4.5 HIGHLAND

### 4.5.1 Corran Ferry

In terms of **vehicle size**, over half (59%) were up to and including 7.5 tonnes gross weight. The main other vehicle types were: articulated (12%); and tanker (8%).

The average (mean) **vehicle length** was slightly over 7m. Over half (53%) were no greater than 5m, while 22% were 12m or above. Two-thirds of respondents stated that their vehicles are classified as commercial vehicles by the ferry operator.

Just under half (47%) of the vehicles have their **base** in Lochaber. The main other company locations were: North Argyll (12%); and Outside Scotland (12%). A further 8% were based in the HIE area outwith Lochaber.

At the time of interview, 10% of vehicles were **empty running**. Of those that were conveying freight on the sailing, the **main types of goods being moved** were:

- Ambient/general goods: 58%.
- Chilled or frozen: 15%.
- Liquids (tanker): 9%.

Where empty running was recorded, interviewees had been/would be, in the main, moving timber on the **other leg of their journey**.

Some 17% of interviewees considered that their load was, or had been when conveyed on the other leg of their journey, **time sensitive**. The time window for these loads, between departing the ferry terminal and delivering the goods, ranged from 20 minutes to 3 hours.

The main trip **origins** on the day of travel were:

- Lochaber: 69%.
- North Argyll: 15%.

In all but 10% of cases this had been the trip's **actual starting point** rather than the location of an overnight stay.

The main trip **destinations** were:

- Lochaber: 83%.
- Mull: 10%.
- North Argyll: 5%.

89% of Lochaber based companies were making deliveries solely within their local area on the day of interview. For companies based elsewhere, the main non-Lochaber trip ends were: North Argyll (43%); and Mull (24%).

Only 3% of vehicles were **dropping off/picking up goods en route**.

In terms of **frequency of use** of the Corran service, the average (mean) number of return trips on the route was 43 per annum, with over one in three (36%) using Corran ferry more than once per week. Trip-making frequency was highest among vehicles based in North Argyll.

The vast majority (90%) of respondents were aware of a **road/bridge alternative** that could have been used for the trip they were making. The main reason given for **choosing to use Corran ferry** rather than travelling by land was a quicker overall journey. This was cited by 74%.

## 4.6 OUTER HEBRIDES

### 4.6.1 Uig-Lochmaddy

In terms of **vehicle size**, half of the sample were up to and including 7.5 tonnes gross weight. A further 23% were rigid vehicles greater than 7.5 tonnes and 18% were articulated.

Average (mean) **vehicle length** was 9.5 metres. 28% were up to and including 5m, with the same proportion of vehicles 12m or above. The vast majority (86%) of respondents stated that their vehicle was classified as a commercial vehicle by the ferry operator.

Just over one third (36%) of **company locations** were within the Outer Hebrides. Three quarters of these companies are based in Lewis rather than the Southern Isles. However, the main location for the sample as a whole was Inverness/East Highland/Moray (41% of respondents).

None of the vehicles surveyed was **empty running** at the time of interview. The **main types of goods being moved** were:

- Ambient/general goods: 59%.
- Chilled or frozen: 19%.
- Dangerous goods: 18%.

Just over one in three (36%) respondents considered that their load was **time sensitive**. The time window, between departing the ferry terminal and delivering the goods, ranged from 20 minutes to 24 hours.

The great majority (91%) of interviewees were using the Uig-Lochmaddy service **in both directions** for their trip to/from the Southern Isles.

The main trip **origins** on the day of travel were:

- Inverness/East Highland/Moray: 45%.
- Skye: 27%.
- North Uist: 9%.

In 45% of cases the origin had been the **location of an overnight stay** rather than the trip's actual starting point.

The main trip **destinations** were:

- North Uist: 36%.
- Inverness/East Highland/Moray: 27%.
- South Uist: 23%.

Within the Outer Hebrides, the main trip ends were: North Uist (48%); and South Uist (24%). Outwith the islands the main trips ends were: Inverness/East Highland/Moray (70%); and Skye (26%).

Over one in four (27%) vehicles were **dropping off/picking up goods en route**.

Over half (59%) of the sample were undertaking **trips that would continue the next day** rather than returning to their base that night.

In terms of **trip frequency**, interviewees' average (mean) number of trips per annum on the Uig-Lochmaddy service is 29. Higher frequency of use is made by companies based in the Outer Hebrides, generally using the service more than once per week.

All of the interviewees had **booked in advance**. 45% of the sample had done so via a block booking. Of those who do not have this facility, most (58%) booked between 3 and 7 days before the sailing.

Just over half (55%) considered that there is **another ferry service** that they could have used for their trip to/from the Uists. The main ones mentioned were:

- Oban-Lochboisdale: 58% of relevant respondents.
- Ullapool-Stornoway: 50%.

The main reasons for **choosing to use the Uig-Lochmaddy service** were:

- Sailing timings were more suitable: 33%.
- Location of ferry terminals is more suitable: 25%.

#### 4.7 SHETLAND

The main findings from the two on-board interviews were that:

- One vehicle was a van of less than 7.5 tonnes weight (and was 5 metres in length), the other was a rigid vehicle of over 7.5 tonnes (10 metres).
- The respective vehicles were based in Lothian/Borders; and Glasgow/Renfrewshire. Both had left from these locations on the day of survey. They were travelling to Shetland and neither stopped en route to the ferry terminal to drop or pick up goods.
- Both were moving ambient loads neither of which was time sensitive.
- Neither vehicle had made any other trips on the Aberdeen-Lerwick service in the past 12 months, suggesting that the journeys being made were "one-offs".
- Both vehicles had booked in advance-between 3 and 7 days before the sailing.
- In terms of the most suitable mainland port for the trip being made, one interviewee identified Aberdeen and the other stated that they did not know which of the ports (Aberdeen, Peterhead or Rosyth) would have been most suitable.

## **5 FINDINGS: TELEPHONE SURVEYS-FREIGHT AND COACH OPERATORS**

### **5.1 FREIGHT OPERATORS**

#### **5.1.1 Ardrossan-Brodick**

The main findings from the interview with one of the hauliers using this route were that:

- A range of vehicle types are deployed but the main two are rigids and artics. Some are over 16 metres in length.
- Refrigerated goods are imported to the island and a range of manufactured goods exported.
- 20% of vehicles leaving Arran are empty running.
- The most common mainland trip ends are Glasgow and North Lanarkshire.
- Block bookings are made.
- A majority of vehicles drop off/pick up goods en route.

#### **5.1.2 Bute**

The interview with one haulier serving the island found that:

- Use is made of both ferry services to Bute.
- This can involve using both routes on a single trip between Bute and the mainland.
- The vehicle used is either a 17m artic or a 9.5m rigid.
- Inbound loads to Bute are chilled/frozen (two thirds of loads) and ambient goods (one third).
- Outbound loads tend to be either foodstuffs or materials for recycling on the mainland.
- 75% of vehicles travelling to the mainland are empty.
- Bookings are not made on either of the ferry services given the high frequency at which they operate.
- All round trips are made within a single day.
- There is no dropping off or picking up of goods between trip origins and destinations.

#### **5.1.3 Kennacraig-Islay**

Interviews with three of the main of the hauliers serving Islay found that:

- There is a relatively high level of tanker traffic, reflecting the presence of the whisky industry.
- The two larger companies use vehicles of up to 17m; the smaller one has vehicles of 6m-11m.
- Empty running leaving Islay can be up to 15%.
- The main trip ends on the mainland are: Glasgow; North Lanarkshire; Clackmannanshire; and Inverness/East Highland/Moray.
- All the companies make block bookings.

A fourth, Oban-based, carrier is a more occasional user. Typically, deliveries are made to Islay once per week with a 3.5 tonne van; usually of white goods and goods ordered from catalogues. The loads are moved from the company depot in Oban and the vehicle is always booked in advance.

#### 5.1.4 Oban-Colonsay

The interview with one haulier found that:

- Vehicles are moved on every sailing to the island.
- They are mostly 5m vans which are not classified as Commercial Vehicles and thus use 6 journey tickets. Around twice per month a 10m vehicle is used.
- All vehicles travelled unaccompanied on the ferry. Island-based drivers deliver the goods on Colonsay and return the empty vehicle on the ferry service.
- The goods are delivered to the company's Oban depot by other carriers and loads are consolidated at the depot. Thus the company's vehicles only travel between Oban and Colonsay.
- Bookings are made a season ahead-eg summer 2007 bookings are made during winter 2006-07.

#### 5.1.5 Oban-Craignure

The interview with one of the main hauliers using this route found that:

- On average, 12 return trips per week are made from the mainland to Mull, including deliveries to Iona.
- A 3.5 tonne vehicle is used, travelling on a 6 journey ticket.
- Inbound loads are ambient goods, covering most products apart from building materials and foodstuffs.
- The company has a depot in Oban. Inbound goods are consolidated there, although full loads are taken directly from the central belt to Mull.
- Outbound loads are predominantly foodstuffs. Almost all of these are transported to the central belt.
- 25% of the vehicles returning from Mull are empty.
- The company delivers directly to customers in the central belt. Most of these are in Glasgow, with the rest tending to be to Helensburgh or Dunbartonshire.
- Where goods have a destination beyond the central belt they are delivered into other hauliers' Glasgow depots for onward forwarding.
- The ultimate destinations of goods are split evenly between the central belt and elsewhere in Scotland/UK.
- The company has block bookings which are made well in advance of the days of sailings. They reported that it is very difficult to get bookings at short notice.

#### 5.1.6 Oban-Coll & Tiree

Interviews were undertaken with two hauliers. The first stated that:

- A range of ambient goods is moved to the islands from the company's Oban depot using 3.5 tonne vehicles.
- The vans travel unaccompanied and goods are delivered by island-based drivers.
- The vans are then returned on the next sailing and are almost always running empty.

The interview with the second operator found that:

- Vehicles are moved on every sailing. The vehicles used is usually a 16m refrigerated lorry and more occasionally a 10m flatbed. In addition, a fuel tanker is taken to the islands on a weekly basis.
- Inbound goods are either ambient or chilled/frozen. They are delivered into the company's Oban depot by third party carriers. Thus the company's own vehicles simply travel between Oban and Coll/Tiree.
- The vehicles are unaccompanied on the fish feed. The deliveries are made by island-based staff with the vehicles returning on the next available sailing to the mainland, almost always running empty.
- Vehicle spaces are booked a season ahead. It was reported that there are problems in making short notice changes to bookings in the winter. This is due to a lack of vehicle space because of the operation of only three sailings per week and a smaller vessel in the winter months.

#### 5.1.7 Ullapool-Stornoway

Information was generated through three telephone interviews with some of the main hauliers using this route. The main findings were that:

- The companies have depots on the mainland which are in effect hubs for mainland distribution, although this is not necessarily undertaken by the companies themselves.
- Two of the companies use a range of vehicle sizes from 3.5 tonnes-44 tonnes gross weight. The other has vehicles of 11-16m.
- Across the companies as a whole it is estimated that mainland trip ends divide between Inverness (60%); and west central Scotland (40%).
- Imports cover a wide range of goods, including refrigerated products.
- Exports tend to be specialist products, some of which are temperature controlled.
- Empty running on ex islands trips appears significant and may be as high as 50%.
- Two of the hauliers also serve the Southern Isles from the mainland, but to a much lower frequency than Lewis.

One haulier who mainly serves the Southern Isles also makes use of the Stornoway service. This is with either a 10m or 18m vehicle, transporting building materials from Inverness twice per week.

### 5.1.8 Uig-Tarbert

The haulier that we interviewed is based outwith the Outer Hebrides and makes only occasional use of the Uig-Tarbert service:

- Movements relate to the export of livestock from Harris to the mainland.
- The vehicle used is a 16m livestock carrier. It travels empty inbound to Tarbert.
- Shipments are around four times per month during the main periods for livestock exports.
- The mainland destinations are Inverness & East Highland or Aberdeenshire.
- Depending on the livestock's destination, on occasion the vehicle returns to the mainland on the Stornoway-Ullapool service, rather than Tarbert-Uig.

### 5.1.9 Uig-Lochmaddy

Interviews were undertaken with two of the main hauliers using this service. The first stated that:

- Usage averages 10 to 12 return trips per week.
- The vehicles used are either an 18m artic or a 10m rigid.
- Inbound loads are mostly building materials. 80% of these originate in the company's Inverness depot, with the balance moved from Glasgow.
- 90% of return movements from the Uists are empty running. There are only occasional exports-either of wool to the Inverness & East Highland area or scrap cars to the central belt.
- No time sensitive loads are conveyed.
- All trip involve an overnight stay of at least one night.
- Bookings are made 3-7 days in advance.
- There is little picking up or dropping off of goods en route.

The other company stated that:

- 18 tonne vehicles are used on the route at a frequency of three return trips per week.
- Inbound goods encompass both ambient and chilled/frozen loads. These are brought from the company's Inverness depot, although on most runs goods (such as animal feed) are also picked up on Skye.
- The main exports are foodstuffs, cars and returned goods.
- The company reported only limited empty running on return trips from the Uists.
- All trips involve an overnight stay away from the vehicles' base.
- Bookings are made a season ahead.

### 5.1.10 Orkney

Interviews were undertaken with three of the main hauliers serving Orkney. The first stated that:

- The balance of use between the Pentland Ferries and Scrabster-Stromness services is 3:1. This is largely due to the relative freight charges on the two services, but choice of route also reflects freight origins and destinations and service timings.
- Less use is made of the Aberdeen-Kirkwall service. This is because the frequency is less than daily; and also because some export traffic has a destination in the Inverness & East Highland area. The Aberdeen route is occasionally used to reposition equipment.
- A significant proportion of food and drink exports from Orkney has a final destination outside Scotland.
- There is a degree of empty running for vehicles returning from Orkney, and the trade imbalance is more pronounced than on Shetland services.

The second company reported that:

- The Scrabster service is used for up to 10 return trips per week. This is for general goods travelling inbound, including some groupage organised by a mainland based haulier.
- Whisky is exported in casks on the Scrabster service using a specialist vehicle, on behalf of another haulier that owns the vehicles. Apart from the whisky traffic, 95% of vehicles travel to the mainland empty.
- The Scrabster service is used rather than Pentland Ferries. This is because Stromness is a more suitable landfall than St Margaret's Hope given the location of the company's Orkney depot.
- Use of the Aberdeen-Kirkwall service can be up to 12 return trips per week, although demand is very seasonal, reflecting the requirements of the agricultural sector for products such as animal feed.
- For the ex Aberdeen traffic the company simply collects the trailers at the ferry terminal. These are loaded onto the ferry, with the goods delivered on Orkney and the trailers then returned to the mainland.
- Aberdeen works well as a port in terms of reliability of sailing. However, the company see no reason why Rosyth could not be used instead, given that around 75% of inbound loads travelling on the Aberdeen-Kirkwall service originate in the central belt.
- Generally the company uses 13.6m trailers and most loads travel unaccompanied.

The third haulier serving Orkney stated that:

- Two to three return trips per week are made with 15m rigid vehicles.
- Use is made of both the Scrabster and Gills Bay services. However, more trips are made on the latter because the sailing times allow an earlier departure from Orkney.
- All loads are ambient goods.
- Mainland trip ends are UK-wide.
- Empty running out of Orkney occurs on 20%-25% of trips.
- On some trips goods are picked up and/or dropped en route. These are generally internet purchases inbound to Orkney; and returned goods on trips from the islands. Pick ups and drops tend to be in the central belt.
- Bookings are usually made around two days in advance.

#### 5.1.11 Aberdeen-Lerwick

Interviews were undertaken with three of the main hauliers that serve Shetland.

The companies are relatively high volume users of the services. For the two companies that provided data, usage is: between 4 and 12 return movements daily; and 5-6 return movements per day on weekdays, and less frequently at weekends.

One company uses a mix of vehicles but, in the main, dropped trailers. The other two operators use the same for almost all movements. In all cases the trailers are standard size (13.6 metres length).

The type of goods moved varies according to direction of travel. For the two companies providing information, a majority of freight northbound is ambient; while, in one case, most southbound traffic is chilled/frozen.

Similarly, the extent of empty running varies by direction of travel. For two companies it is significant on trips from Shetland (up to 50%). In contrast, the other operator reported empty running on less than 10% of its entire movements on the ferry.

Respondents tended to consider almost all loads as time sensitive as customers expect goods to be delivered within/by a certain time. However, given the importance of perishable products within exports from Shetland, time sensitive loads are more common for goods being moved south. One company reported that a majority of southbound loads are time sensitive.

The companies had great difficulty in specifying the mainland origins and destinations of traffic. In particular, this is because third parties deliver freight into the companies' Aberdeen depots for onward transport to, and distribution in Shetland, and the true origin of these loads is not known. Similarly, some goods that appear to originate from the central belt may have been consolidated there having originally been trucked from England. In the case of export movements from Shetland, one company reported that around 30% ultimately travelled to destinations outside the UK and, among the remainder, a majority would be delivered to England rather than Scotland.

Two companies reported picking up and dropping goods on the mainland when travelling to/from the ferry terminal at Aberdeen. In one case this may occur on as many as 50% of trips.

Two companies provided information on booking. One company usually books space a week in advance. The other reserves space up to three months ahead but actual requirements, in terms of spaces, are confirmed to the operator on the day itself.

Finally, respondents were asked to specify which one of the three ports of Aberdeen, Peterhead and Rosyth would be most suitable for their freight movements to/from Shetland. All three identified Aberdeen. Their reasons are shown below.

1

Aberdeen generally works well. There is a lack of space at Rosyth port while Peterhead would be less reliable than Aberdeen in adverse weather. The company have a base in Aberdeen and a lot of their customers are based in the city.

2

Aberdeen is preferred. However, if a "clean sheet" was possible then Rosyth would be preferable due to the impact of adverse weather on the ferries' ability to use Aberdeen. The company in question has no reason to have a base in Aberdeen other than that it is the location of the existing ferry terminal. Use of Rosyth could allow the ferry company to operate a smaller number of bigger ships compared to the present fleet.

3

The number of closures of Aberdeen in adverse weather has been exaggerated. Further, moving the service to another mainland port would require infrastructure investment to replicate that already exists at Aberdeen. Operating from Rosyth would mean that Shetland would increasingly source goods from the Edinburgh rather than the Aberdeen area. This would present difficulties to hauliers given the road congestion in and around the capital. In addition, some imports to Shetland are presently sourced from Glasgow and there would not, it was claimed, be a significant saving in mileage by transporting these to Rosyth rather than Aberdeen.

## 5.2 COACH TOUR OPERATORS

### 5.2.1 Hunters Quay-McInroy's Point (Western Ferries)

The company we interviewed reported that:

- Around 100 coach crossings per annum are made on the Western Ferries service.
- These are single trips moving cruise ship passengers on a day trip between Greenock and Loch Lomond.
- The vehicles used are 12m in length (51 seats).
- Bookings are made as soon as the tour is confirmed by the cruise ship agents.

### 5.2.2 Ardrossan-Brodick

The operator reported that:

- 20 day trips per year are made to Arran from the Cowal/Helensburgh/Lomond area (Arrochar).
- The Ardrossan-Brodick route is used in both directions.
- The coaches are mostly of 57 seat capacity, although some are 49.
- Bookings are made around nine months in advance.

### 5.2.3 Bute

Two of the operators interviewed offer day tours to Bute. The first stated that the:

- Trips operate at a frequency of 3-6 per week, between May and October.
- Mainland origin is the Cowal/Helensburgh/Lomond area (Arrochar).
- Colintraive-Rhubodach service is used in both directions.
- The coaches are mostly of 57 seat capacity, although some are 49.
- Bookings are made around nine months in advance.

The second company:

- Provides around four tours per annum, on an as requested basis. Customers are from west central Scotland.
- Operates vehicles of 12m in length (51 seats).
- Usually travels on the Wemyss Bay service in both directions.

### 5.2.4 Kennacraig-Islay

Two of the companies interviewed operate tours to Islay. In both cases the itineraries include day trips to Jura and Colonsay.

The first operator offers six tours per year to Islay, with five nights spent on the island. Travel in both directions does not include an overnight stay on the mainland. The outward leg is from the central belt to Kennacraig. The return leg from Islay includes travel on the Tarbert-Portavadie, Colintraive-Rhubodach and Wemyss Bay-Rothesay services. Bookings for the following year are made in November.

The second company operates 6-7 tours per year to Islay, with six nights spent on the island. 18 seater vehicles are used. No overnight stays are made on the mainland and travel between the central belt and Kennacraig is wholly by road.

#### 5.2.5 Oban-Craignure

The two operators interviewed operate day trips to Mull & Iona.

The first company's trips originate from North Argyll (Loch Awe). Around 5-6 trips per week are made between May and September. The coaches are mostly of 57 seat capacity, although some are 49. Bookings are made around nine months in advance.

The second operator offers one trip per week during a seven month season. The mainland origins are:

- North Argyll (Oban/Dalmally).
- Fife/Clackmannanshire/Stirling/Perth & Kinross (Crianlarich/Tyndrum).

The coaches have a 59 seat capacity and bookings are made one year in advance.

#### 5.2.6 Outer Hebrides

Three of the operators surveyed offer tours to the Outer Hebrides.

The first company offers one tour per week during seven months of the year. The tour starts in the central belt and the Mallaig-Armadale service is used to travel to Skye where an overnight stay is made prior to travelling from Uig to Tarbert. Five nights are spent in the Outer Hebrides. The coach returns to the mainland via Castlebay-Oban after which it travels directly to the central belt. Bookings for the following year are made in November.

The second operator offers seven tours per annum to the Outer Hebrides, using 18 seat coaches. Seven nights are spent on the islands and there are no overnight stops on the mainland. The outward leg involves travelling between Ullapool and Stornoway, while the vehicle returns to Edinburgh/Glasgow on the Castlebay-Oban service. Bookings for the following year are made in October.

The other company operates day trips from Inverness to Lewis eight times per year. These are as part of a wider tour of the Highlands & Islands. The day trips are made in July and August and use 8 seater vehicles on the Ullapool-Stornoway service.

#### 5.2.7 Orkney

Two interviewees offer coach tours to Orkney.

The first provides 12 tours per year, between May and September, from central Scotland. A 49 seat coach is used and travels on the Aberdeen-Kirkwall service. One night is spent on Orkney and the return to the mainland is overnight on the ferry to Aberdeen. No overnight stays are made on the mainland.

The second company offers 1-2 tours per year to Orkney from central Scotland. The tour lasts five nights including one overnight sailing from Kirkwall to Aberdeen. The Aberdeen service is used in both directions. No overnight stays are made on the mainland.

Caithness is seen as too distant for a coach journey from central Scotland. Further, use of the ferry services across the Pentland Firth would probably require an overnight stay on the mainland to be added to the itinerary.

#### 5.2.8 Shetland

The company interviewed offers 1-2 tours per year to Shetland from central Scotland. The tour lasts five nights including two overnights on the sailings between Aberdeen and Lerwick. No overnight stays are made on the mainland.

## **APPENDIX: ON-BOARD SURVEY QUESTIONNAIRES**

**ON-BOARD SURVEY QUESTIONNAIRE-EXCLUDING FREIGHT VEHICLE DRIVERS**

**i. Which Specific Route Are You On Today?**

.....

1. What is the **main** purpose of the trip you are making today?  
**SHOWCARD A – SINGLE CODE ONLY**

	Please circle <b>ONE</b> Only
Commuting to/from regular place of work	1
Employer's business	2
Travelling to/from place of education	3
On Short-break (Up to 4 nights away from home)	4
On Holiday-staying at one main location	5
On Touring holiday-visiting a number of locations	6
Visiting Friends & Relatives	7
Personal Business	8
Shopping	9
Other Leisure	10
Other	11
Please write in.....	

2. Is the trip you are making on the ferry today a:  
**SHOWCARD B – SINGLE CODE ONLY**

	Please circle <b>ONE</b> Only
<b>A day trip</b> -from home or returning home	1
<b>A day trip</b> -while you are staying away from home on holiday, business, etc.	2
Going to or from, a holiday or business trip, which involves <b>at least one overnight stay</b> away from home – this includes returning "home" for an extended period.	3
Other	4
Please write in .....	

3. Where did you set off from this morning?  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

21 – On board this vessel

22 – On a coach

23 – On another vessel

4a. Is that your home/usual place of residence?

Yes	1	<b>GO TO Q7</b>
No	2	<b>GO TO Q4b</b>

4b. Where is your home/usual place of residence?  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

5. On **the night before last** did you stay at the same place where you began your trip today?

Yes	1	<b>GO TO Q7</b>
No	2	<b>GO TO Q6</b>

6. Where did you stay the night before last?  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

- 21 – On board this vessel
- 22 – On a coach
- 23 – On another vessel

7. What is/was the **main** destination for your trip **today**?  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

8. Where will you be staying **tonight**? (please choose **ONE** option)  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

21 – On board this vessel

22 – On a coach

23 – On another vessel

9. Will you be staying at the same place **tomorrow night**?

Yes	1	<b>GO TO Q11</b>
No	2	<b>GO TO Q10</b>

10. Where will you stay tomorrow night?  
**SHOW MAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

21 – On board this vessel

22 – On a coach

23 – On another vessel

11. Is the trip you are making on this ferry (tick **one** only):  
**SHOWCARD C**

The outward leg of a return trip	1	<b>GO TO Q12</b>
The return leg of a return trip	2	<b>GO TO Q12</b>
A single trip	3	<b>GO TO Q14 over page</b>
Part of a trip with more than one destination-only using this ferry route in one direction	4	<b>GO TO Q13</b>

**ASK ONLY THOSE CODED 1 and 2 at Q11 (i.e. on a return trip)**

12. For the other leg of your trip, did/will you use:  
**SHOWCARD D**

This ferry route	1	Go to Q14
Another ferry route	2	<b>Go to Q12a</b>
Scheduled air service	3	<b>Go to Q12b</b>
Road or bridge	4	Go to Q14
Other	5	<b>Go to Q12c</b>

**IF Coded 2 at Q12**

12a Please specify which other ferry route you did/will use.

.....

**IF Coded 3 at Q12**

12b Please specify which other air service you did/will use.

.....

**IF Coded 5 at Q12**

12c Please specify other method of travel.

.....

**FOR ALL ANSWERING Q12a, b and c - NOW GO TO Q14**

**ASK ONLY Q13 TO THOSE CODED 4 AT Q11 – (i.e. using ferry as a multi-trip with the ferry as one leg)**

13. Which ferry service will you use/have you used in conjunction with this one?

Used / will use ferry service	1	<b>Go to Q13a</b>
None (road/fixed link used in conjunction with this ferry service)	2	Go to Q14

**IF Coded 1 at Q13**

13a Please specify which other ferry route you did/will use.

.....

14. What form of transport did you use to travel to the ferry terminal?  
**SHOWCARD E – MULTI CODE POSSIBLE**

Car/Motorbike/motorhome/Goods Vehicle	1	<b>GO TO Q15</b>
Train	2	<b>GO TO Q17</b>
Scheduled bus / coach service	3	<b>GO TO Q17</b>
Taxi	4	<b>GO TO Q17</b>
Walk	5	<b>GO TO Q17</b>
Cycle	6	<b>GO TO Q17</b>
Other	7	<b>GO TO Q17</b>
Please write in.....		
Bus, coach or minibus Tour	9	<b>GO TO Q15</b>
Private coach or minibus hire	10	<b>GO TO Q15</b>

15. Are you travelling with the vehicle on the ferry today?

Yes	1	<b>GO TO Q17</b>
No	2	<b>GO TO Q16</b>

16. Did you leave your vehicle at the ferry terminal?

Yes	1
No-I got a lift to the ferry terminal	2

17. What form of transport will you use to travel onwards after this sailing?  
**SHOWCARD E – MULTI CODE POSSIBLE**

Car/Motorbike/Goods Vehicle	1
Train	2
Scheduled bus service	3
Walk	4
Taxi	5
Cycle	6
Other	7
Please write in.....	
Not sure yet	8
Official Tour Bus, coach or minibus	9
Privately organised coach or minibus hire	10

18. **Excluding this trip**, how many **return** trips have you made on **this** ferry service in the last year?

None	1
1-3	2
4-8	3
9-12	4
13-26	5
27-52	6
More than 52	7
Don't know	8

**QA. DO NOT ASK – CODE ONLY**

Is this a **bookable** ferry service?

Yes	1	<b>GO TO Q19</b>
No	2	<b>GO TO QB</b>

19. Did you make a booking with the ferry operator for today's trip?

Yes	1	<b>GO TO Q20</b>
No	2	<b>GO TO QB</b>
Don't Know	3	<b>GO TO QB</b>

20. How far in advance of today's trip was the booking made?

**SHOWCARD F SINGLE CODE**

Less than 24 hours	1
1-2 days	2
3-7 days	3
8-14 days	4
15-28 days	5
More than 28 days	6
Don't Know	7

**QB. DO NOT ASK – CODE ONLY**

Is this a route where **another ferry service** could be used to make this trip?

Yes	1	<b>GO TO Q21</b>
No	2	<b>GO TO QC</b>

21. Are you aware of any other ferry service that you could have used for this trip?

Yes	1	<b>GO TO Q22</b>
No	2	<b>GO TO QC</b>
Don't Know	3	<b>GO TO QC</b>

22. Which one(s) could you have used?

.....

.....

23. What is the **main** reason you chose to travel on **this** ferry service rather than the other ferry service you mentioned?:  
**SHOWCARD G – SINGLE CODE ONLY**

	Please circle <b>ONE</b> Only
Lower cost of fares	1
Timings of departure/arrival was more suitable	2
Frequency of sailing was more suitable	3
Location of ferry terminals is more suitable	4
Shorter overall journey time	5
Shorter sea crossing	6
Other ferry was fully booked	7
Will be using/had used other ferry service on other leg of trip	8
Did not have enough information about the other ferry service	9
Other	10
Please write in.....	
Don't Know	11

**QC. DO NOT ASK – CODE ONLY**

Is this a route where a **road or bridge** could be used to make this trip?

Yes	1	<b>GO TO Q24</b>
No	2	<b>GO TO QD</b>

24. Are you aware of a road or bridge that you could have used for this trip instead of this ferry?

Yes	1	<b>GO TO Q25</b>
No	2	<b>GO TO QD</b>
Don't Know	3	<b>GO TO QD</b>

25. Which one(s) could you have used?

.....  
 .....

26. What is the **main** reason you chose to travel on this ferry service rather than by road or bridge?:

**SHOWCARD H – SINGLE CODE ONLY**

	Please circle <b>ONE</b> Only
Overall cheaper journey	1
Overall quicker journey	2
Will be using/had used road/bridge on other leg of trip	3
Would rather sail than travel by road or bridge	4
Other	5
Please write in.....	
Don't Know	6

**QD. DO NOT ASK – CODE ONLY**

Is this a route where a **scheduled air service** could be used to make this trip?

Yes	1	<b>GO TO Q27</b>
No	2	<b>GO TO Q30</b>

27. Are you aware of any scheduled air service that you could have used for this trip instead of this ferry route?

Yes	1	<b>GO TO Q28</b>
No	2	<b>GO TO Q30</b>
Don't Know	3	<b>GO TO Q30</b>

28. Which one(s) could you have used?

.....

.....

29. What is the **main** reason you chose to travel on this ferry service rather than by air?

**SHOWCARD I - SINGLE CODE ONLY**

	Please circle <b>ONE</b> Only
Lower cost of fares	1
Convenience of travelling with own car / motor home / motorbike	2
Timing of departure/arrival was more suitable	3
Frequency of ferry service was more suitable	4
Location of ferry terminals is more suitable than location of airports	5
Air service was fully booked	6
Will be using/had used air service on other leg of trip	7
Do not like flying	8
Did not have enough information about the air service	9
Other	10
Please write in.....	
Don't Know	11

**Go to classification (Q33) unless travelling on Northlink ferries.**

**ASK ONLY TO THOSE TRAVELLING ON NORTHLINK FERRIES TO KIRKWALL AND LERWICK**

30. Which of the following mainland ports would have been most suitable for the trip you are making today? **READ OUT**

Aberdeen	1	<b>GO TO Q31</b>
Peterhead	2	<b>GO TO Q33</b>
Rosyth	3	<b>GO TO Q33</b>
Not relevant-travelling between Kirkwall and Lerwick	4	<b>GO TO Q33</b>
Don't Know	5	<b>GO TO Q33</b>

31. If using a mainland port other than Aberdeen allowed larger vessels on the route which could provide more cabins and were more comfortable in rough weather, would you still prefer Aberdeen to be the mainland port for this service?

Yes	1	<b>GO TO Q33</b>
<u>No</u>	<u>2</u>	<b><u>GO TO Q32</u></b>
Don't Know/Have no view on this issue	3	<b>GO TO Q33</b>

32. Would you then prefer:

Peterhead	1
Rosyth	2
Either Peterhead or Rosyth would be equally suitable	3
Neither Peterhead nor Rosyth	4
Don't Know	5

## **CLASSIFICATION**

33. Gender.

Male	1
Female	2

34. How many people, **including yourself**, are travelling in your party today?

1 person	1
2	2
3	3
4	4
5	5
6+ people	6

35. In which of the following age bands do you fall?

16-24	1
25-34	2
35-44	3
45-54	4
55-60	5
Over 60	6

36. Which of the following best describes your employment status?

### **SHOWCARD K**

Employed/self-employed	1
Unemployed and seeking work	2
In education/training	3
Looking after home/family	4
Unable to work due to disability/illness	5
Retired	6
Other	7
Please write in.....	

**This question is important to establish which direction the ferry is travelling in.**

37. From which port did you start this journey on this ferry and where will the ferry journey end?

Start:- .....

Finish:- .....

**For Northlink Ferries Only**

<b>Ferry Route (Respondents starting point to final Destination)</b>	<b>Circle</b>
Aberdeen to Kirkwall	1
Aberdeen to Lerwick	2
Kirkwall to Lerwick	3

**For Castlebay Lochboisdale route Only**

<b>Ferry Route (Respondents starting point to final Destination)</b>	<b>Circle</b>
Oban to Castlebay	1
Oban to Lochboisdale	2
Castlebay to Lochboisdale	3

Respondent's Name .....

Address .....

.....

Postcode ..... Telephone Number .....

Interviewer Name ..... Interviewer Number .....

Date of Interview ..... Respondent ID Number .....

**THANK & CLOSE**

**N-BOARD SURVEY QUESTIONNAIRE-FREIGHT/COMMERCIAL VEHICLE DRIVERS**  
**ALL THOSE WITH A VEHICLE CLASSED AS A COMMERCIAL VEHICLE BY THE FERRY OPERATOR OR**  
**CONVEYING FREIGHT/LIVESTOCK**

**i. Which Specific Route Are You On Today?**

.....

1. Which of the following best describes the vehicle you are travelling with today?  
**SHOWCARD A**

Van-up to 7.5 tonnes	1
Vehicle and trailer	2
Livestock carrier	3
Rigid vehicle-greater than 7.5 tonnes	4
Articulated vehicle	5
Tanker	6
Other	7
Please write in.....	

2. What is the total length of your vehicle?

..... metres

3. For charging purposes, is the vehicle classed as a **Commercial Vehicle** on this ferry route?

Yes	1
No	2
Don't know	3

4. Which of the following best describes the type of freight/goods you are moving today?

**SHOWCARD B**

Ambient/General goods	1	<b>GO TO Q6</b>
Chilled	2	<b>GO TO Q6</b>
Frozen	3	<b>GO TO Q6</b>
Liquids (Tanker)	4	<b>GO TO Q6</b>
Timber (Unprocessed)	5	<b>GO TO Q6</b>
Livestock	6	<b>GO TO Q6</b>
Dangerous goods	7	<b>GO TO Q6</b>
Other	8	<b>GO TO Q6</b>
Please write in.....		
Empty on this leg	9	<b>GO TO Q5</b>

5. Which of the following best describes the type of freight/goods you moved/will be moving on the other leg of your journey?

**SHOWCARD C**

Ambient/General goods	1
Chilled	2
Frozen	3
Liquids (Tanker)	4
Timber (Unprocessed)	5
Livestock	6
Dangerous goods	7
Other	8
Please write in.....	
Empty on this leg	9

6. Is/was your load **time sensitive**, needing to reach its destination at a **specific** time?

Yes	1	<b>GO TO Q7</b>
No	2	<b>GO TO Q8</b>

7. How many hours do/did you have between leaving the ferry terminal and getting the load to its destination?

..... hours

8. Is the trip you are making today (tick **one** only):

The outward leg of a return trip	1
The return leg of a return trip	2
A single trip	3

9. For the other/next leg of your trip, did/will you use:

Road or bridge	1	Go to Q10
This ferry route	2	Go to Q10
Another ferry route	3	<b>Go to Q9a</b>

**IF Coded 3 at Q9**

9a Please specify which other ferry route you did/will use.

.....

10. Where did you set off from this morning?  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

11. Was this the actual starting point for this leg of your trip **or** was it an overnight stop on route?

Actual starting point	1	<b>GO TO Q13</b>
Overnight stop	2	<b>GO TO Q12</b>

12. Where did this leg of your trip actually start?  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

13. What is/was the **main** destination for your trip **today**?  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**)

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

14. Did you go/are you going directly to this destination **or** did/will you stop to pick up or drop off goods on route?

Directly	1
Stopping off on route	2
Don't know	3

15. Where will your journey actually finish today?  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

16. Will this particular trip continue **tomorrow**?

Yes	1	<b>GO TO Q17</b>
No	2	<b>GO TO Q18</b>

17. Where will it finish **tomorrow**?  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

18. **Excluding this trip, how many return trips have you made on this ferry service to move freight/travel with a Commercial Vehicle in the last year?**

**SHOWCARD D**

None	1
1-3	2
4-8	3
9-12	4
13-26	5
27-52	6
More than 52	7
Don't Know	8

**QA. DO NOT ASK – CODE ONLY**

Is this a **bookable** ferry service?

Yes	1	<b>GO TO Q19</b>
No	2	<b>GO TO QB</b>

19. Were you booked on this ferry for today's trip?

Yes	1	<b>GO TO Q20</b>
No	2	<b>GO TO QB</b>
Don't Know	3	<b>GO TO QB</b>

20. How far in advance of today's trip was the booking made?

**SHOWCARD E – SINGLE CODE**

Less than 24 hours	1
1-2 days	2
3-7 days	3
8-14 days	4
15-28 days	5
More than 28 days	6
Advance block booking	7
Don't Know	8

**QB. DO NOT ASK – CODE ONLY**

Is this a route where **another ferry service** could be used to make this trip?

Yes	1	<b>GO TO Q21</b>
No	2	<b>GO TO QC</b>

21. Are you aware of any other ferry service that you could have used for this trip?

Yes	1	<b>GO TO Q22</b>
No	2	<b>GO TO QC</b>
Don't Know	3	<b>GO TO QC</b>

22. Which one(s) could you have used?

.....  
 .....

23. What is the **main** reason you chose to travel on **this** ferry service rather than the other ferry service you mentioned?

**SHOWCARD F – SINGLE CODE ONLY**

Lower cost of fares	1
Timings of departure/arrival was more suitable	2
Frequency of sailing was more suitable	3
Location of ferry terminals is more suitable	4
Shorter overall journey time	5
Shorter sea crossing	6
Other ferry was fully booked	7
Did not have enough information about the other ferry service	8
Other	9
Please write in.....	
Don't Know	10

**QC. DO NOT ASK – CODE ONLY**

Is this a route where a **road or bridge** could be used to make this trip?

Yes	1	<b>GO TO Q24</b>
No	2	<b>GO TO Q28</b>

24. Are you aware of a road or bridge that you could have used for this trip instead of this ferry?

Yes	1	<b>GO TO Q25</b>
No	2	<b>GO TO QD or Q27</b>
Don't Know	3	<b>GO TO QD or Q27</b>

25. Which one(s) could you have used?

.....  
 .....

26. What is the **main** reason you chose to travel on this ferry service rather than by road or bridge?  
**SINGLE CODE ONLY**

Overall cheaper journey	1
Overall quicker journey	2
Other	3
Please write in.....	
Don't Know	4

**ASK QD ONLY TO RESPONDENTS ON NORTHLINK FERRIES TO SHETLAND AND ORKNEY**

QD. Which of the following mainland ports would have been most suitable for the trip you are making today? **READ OUT**

Aberdeen	1
Peterhead	2
Rosyth	3
Not relevant-travelling between Kirkwall and Lerwick	4
Don't Know	5

**ASK ALL**

**CLASSIFICATION**

27. What is the name of the company you work for?

.....

28. Where is your company located? (if more than one location then ask interviewee for location where **they** are based)  
**SHOWMAP**

Please write in name of **island** .....

**OR**

At another location on map (please circle ONE number **below**

Please circle ONE number

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18

**This question is important to establish which direction the ferry is travelling in.**

29. From which port did you start this journey on this ferry and where will the ferry journey end?

Start:- .....

Finish:- .....

**For Northlink Ferries Only**

<b>Ferry Route (Respondents starting point to final Destination)</b>	<b>Circle</b>
Aberdeen to Kirkwall	1
Aberdeen to Lerwick	2
Kirkwall to Lerwick	3

**For Castlebay Lochboisdale route Only**

<b>Ferry Route (Respondents starting point to final Destination)</b>	<b>Circle</b>
Oban to Castlebay	1
Oban to Lochboisdale	2
Castlebay to Lochboisdale	3

Respondent's Name .....

Address .....

.....

Postcode ..... Telephone Number .....

Interviewer Name ..... Interviewer Number .....

Date of Interview ..... Respondent ID Number .....

**THANK & CLOSE**

- 1 Caithness & Sutherland
- 2 Wester Ross
- 3 Lochaber
- 4 Inverness, East Highland & Moray
- 5 North Argyll
- 6 Kintyre and Mid Argyll
- 7 Cowal/Helensburgh/Lomond
- 8 North Ayrshire
- 9 South Ayrshire/East Ayrshire/Dumfries & Galloway
- 10 Edinburgh/East Lothian/Midlothian/West Lothian/Borders
- 11 Inverclyde
- 12 Glasgow/Renfrewshire/East Renfrewshire
- 13 North Lanarkshire/Falkirk/West Dunbartonshire/East Dunbartonshire/South Lanarkshire
- 14 Fife/Clackmannanshire/Stirling/Perth & Kinross
- 15 Dundee/Angus
- 16 Aberdeen
- 17 Aberdeenshire
- 18 Outside Scotland

