ORIGIN/DESTINATION
AND TRAVEL NEEDS
OF PASSENGERS AND FREIGHT

Final Report

To

ZetTrans

reference
economic consultants

January 2009

CONTENTS

EXECUTIVE SUMMARY

OBJECTIVES

Reference was commissioned by ZetTrans to undertake research with users and potential users of Shetland's external transport services. The objective of the research was to collect information on travel patterns and reactions to possible changes in external transport provision. It is intended that the information generated will:

- Increase ZetTrans' knowledge and understanding of current passenger and freight travel to/from Shetland.
- Inform the development of policies and potential interventions outlined, and in some cases unresolved, within ZetTrans' Regional Transport Strategy.
- Inform the understanding of why some potential visitors choose not to travel to Shetland.

RESEARCH METHODS

All of the primary research was undertaken during 2008. It comprised:

- 1,201 telephone interviews with Shetland residents.
- 402 face-to-face interviews with visitors departing Shetland by ferry.
- 400 face-to-face interviews with visitors departing Shetland by air.
- 1,407 online interviews with visitors who had requested a brochure about Shetland from VisitScotland. They included both those who had visited Shetland and those who had not done so.
- 30 face-to-face and telephone interviews with Shetland businesses.
- 13 face-to-face consultations with a range of stakeholders, including transport operators and sectoral organisations.

TRAVEL COSTS ARE THE KEY ISSUE

Cost was consistently highlighted as the area of least satisfaction with existing transport services. This was across residents, visitors and Shetland businesses.

Apart from visitors travelling by ferry, fare levels are regarded as less than "adequate". In particular, they are not well regarded by visitors using the air services. While 70% of visitors regarded air services as, overall, being "good" or "very good" only 15% had the same perception of air fare levels.

Based on the online survey, cost is deterring some potential visitors to Shetland. Some 13% of those who had not visited Shetland stated that this was solely because travel is too expensive. For a further 15% transport costs were one of a number of factors which led them not to travel to Shetland. Cost of travel is a greater deterrent than any other transport-related factor, including the overall journey time to Shetland.

Cost was also the most significant potential deterrent to existing visitors making repeat trips. Almost one in four (24%) of visitors travelling by air stated that the fare levels could deter them from making future visits. The figure for visitors travelling by ferry was lower (8%).

The transport challenge facing Shetland is magnified by the fact its main tourism competitor appears to be the UK mainland rather than other Scottish islands. Over half (55%) of those who chose not to visit Shetland solely because they viewed travel as too expensive made a trip to a destination on the UK mainland instead. Only 18% visited another Scottish island instead of Shetland.

The challenge going forward will be to address the cost issue while still maintaining what users value about existing transport services.

GENERAL SATISFACTION WITH EXISTING PROVISION

Apart from cost, there is general satisfaction with the existing services. Satisfaction with the *overall* service ranged between:

- 61% of residents describing air services as either "good" or "very good"; and
- 94% of visitors giving the same description to ferry services.

The transport services are seen as being reliable and having suitable arrival and departure times. Visitors in particular perceive them as providing sufficient capacity to permit travel on their preferred flight or sailing. This is an important factor in visitors' decision whether or not to visit Shetland.

There are, however, some specific areas of concern to some users. For example, the business survey identified that:

- Commenting on fares in general could be difficult as the levels charged on air services depend on how far in advance a ticket is booked.
- Sea freight capacity scored reasonably well among Shetland businesses. This reflects the availability of passenger and ro-ro freight vessels and a lo-lo service. However, there are specific issues facing some Shetland companies that require to charter bulk vessels.
- Air service frequency and timings are quite well regarded. However, this was less so for some routes-notably Glasgow.

Residents reported some difficulties in booking cabins and flights in the midsummer months due to a lack of capacity. Only 29% considered the ability to book a cabin on their preferred sailing in the months of June, July and August as either "good" or "very good". Further, over half (56%) the residents believe that there are not enough cabin spaces on the Northlink ships.

Despite this, almost all (over 95%) of residents were able to travel on their preferred flight or sailing on their most recent trip. In addition, the surveys show little evidence of capacity constraints having deterred potential visitors from travelling to Shetland.

The air and shipping services are equally important to Shetland. Visitors choose between the two modes according to their preferences. Air is selected by those seeking the fastest end-to-end journey time. Those choosing ferry tend to do so because they need/want to travel with their own vehicle or because of lower overall travel costs compared to air. Shetland companies make most (86%) business trips by air. However, they are very heavily reliant on shipping for the movement of goods to and from the islands.

The quality of transport provision outside Shetland is important to overall travel to/from the islands. For example:

- More than one in five visitor (28%) and resident (22%) air trips involve connecting with an onward flight outside Shetland.
- Over one in six (18%) residents travel onwards by scheduled bus service from their destination airport on the mainland UK.

Some interest was expressed in shuttle bus connections to rail and bus stations in Aberdeen. For example, 16% of all residents arriving at Aberdeen ferry terminal would consider using such a service.

There is general satisfaction with existing transport services, aside from fare levels. However, an issue going forward will be maintaining capacity and reliability as demand continues to grow and users' expectations increase over time. This suggests that new developments and opportunities should be considered-particularly where they can reduce travel costs.

TRIP ORIGINS AND DESTINATIONS

The survey results show a wide range of trip ends outside Shetland. For **trips by air,** travel to/from outside Scotland is significant for all travellers and especially for visitors. One in three (33%) of visitors departing Shetland by air were travelling to a destination outside Scotland on the same day.

Aberdeen City is a particularly important destination for residents' air trips and, to a lesser extent, for those made by visitors returning to the mainland. Some 39% of residents travelling by air stayed in Aberdeen City on the first night after leaving Shetland.

For business travel from Shetland, Edinburgh/Lothian/Borders (21% of all business trips) is more important than Aberdeen City (14%). Nevertheless, the latter is significant for some companies. The most important business trip destinations are outside Scotland (30%).

For **trips by ferry**, Aberdeen City is particularly important for residents (30% staying there on the first night after arriving from Shetland). It also accounts for 38% of the business trips that Shetland businesses make by sea. For visitors, trips to/from outside Scotland are particularly significant, while Aberdeen City and Edinburgh/Lothian/Borders are equally important trip ends.

Overall, while Aberdeen City accounts for less than half of all trip ends, and is less important for freight than passenger movements, it is generally the most important trip end within Scotland.

MAINLAND FERRY PORT ISSUES

Where people are travelling to/from outside Shetland will influence how they view the choice of mainland port. However, selecting a port also raises the issue of road and public transport links for onward travel to the final destination, rather than simply the facilities in the town or city around the port itself.

Of the various groups surveyed, Aberdeen is most important to Shetland residents. Almost three quarters (74%) stated that it is either "important" or "very important" that the ferry service sails to Aberdeen rather than another Scottish mainland port. This was, however, of less importance to visitors and Shetland businesses.

The importance of Aberdeen cannot be viewed in isolation from the pros and cons of the alternatives. Across each survey, Aberdeen was the preferred port rather than Rosyth, as follows:

- Residents: Aberdeen the preferred port of 73%, Rosyth 5%.
- Visitors: Aberdeen 48%, Rosyth 29%.
- Businesses: Aberdeen 52%, Rosyth 16%.

A number of respondents in each group did, however, consider both Aberdeen and Rosyth equally suitable.

For passenger travel one of Aberdeen's key attractions is its onward transport connections compared to those available from Rosyth or Peterhead. Approaching half (46%) of the residents who preferred Aberdeen as the mainland port did so for this reason. It is also important to residents for:

- Its links with friends and relatives. Some 42% of residents have friends and/or relatives who live in Aberdeen City; and
- Access to health services. Apart from onward transport connections, this was the main reason why residents stated that it was either "important" or "very important" that the ferry service sails to Aberdeen.

There are uncertainties around what, say, a Rosyth service could look like in terms of sailing times and frequency and, especially, fare levels. Despite this, the vast majority (91%) of residents felt they had sufficient information to select a preferred port-and that was largely Aberdeen.

TRAVEL TO SUMBURGH AIRPORT

At face value use of the bus service to Sumburgh Airport looks low. Some 4% of residents and 10% of visitors used the service on their most recent trip.

However, these figures need to be benchmarked against those for other airports. On the inbound leg to Shetland, only 6% of visitors had used a scheduled bus service to reach the airport from where they flew to Sumburgh. In this context, usage of the Sumburgh bus service does not appear too modest.

There does not appear to be a large pool of potential users of the bus service. This is because very few residents (9%) and visitors (11%) who had not used the service even considered it as an option. The main possibility for increasing patronage lies in adjusting the timetable to meet as many flights as possible and publicising this fact to potential passengers.

1 INTRODUCTION

This is the final report of research into Shetland's external transport services. The work was conducted on behalf of ZetTrans.

1.1 RESEARCH OBJECTIVE

The objective of the research was to collect information on travel patterns and reactions to possible changes in external transport provision. It is intended that the information generated will:

- Increase ZetTrans' knowledge and understanding of current passenger and freight travel to/from Shetland.
- Inform the development of policies and potential interventions outlined, and in some cases unresolved, within ZetTrans' Regional Transport Strategy.
- Inform the understanding of why some potential visitors choose not to travel to Shetland.

1.2 REPORT STRUCTURE

Chapter 2 Describes the various strands of research undertaken.

Chapter 3 Reports the main findings of the survey of Shetland residents. It also includes relevant information from our wider consultations.

Chapter 4 Presents the findings of the face-to-face surveys of visitors to Shetland.

Chapter 5 Contains the main findings of an online survey of actual and potential visitors to Shetland.

Chapter 6 Reports the findings of our survey of Shetland businesses. These are supplemented by information on freight and livestock traffic from our consultations.

Chapter 7 Provides the main conclusions from the research.

There are three **Appendices**:

Appendix A Shows the profile of respondents to the surveys of residents and visitors.

Appendix B Contains a list of consultees.

Appendix C Contains the maps used in the surveys of residents and visitors.

2 RESEARCH STRANDS

2.1 FACE-TO-FACE SURVEYS OF RESIDENTS AND VISITORS

2.1.1 Visitors To Shetland

Visitors Departing Shetland By Ferry

Face-to-face interviews were undertaken with 402 visitors at Lerwick ferry terminal. These were with passengers using the Northlink service. The interviews were weighted by time of year in order to produce a sample that would be broadly representative of the distribution of visitor ferry trips by season, as follows during 2008:

- March 6th to April 18th-70 interviews.
- May 1st to 15th June-90 interviews.
- June 25th to 22nd August-242 interviews.

Visitors Departing Shetland by Air

Face-to-face interviews were undertaken with 400 visitors at Sumburgh Airport. The interviews were weighted by time of year in order to produce a sample that would be broadly representative of the distribution of visitor air trips throughout the year as follows during 2008:

- March 6th to April 18th-70 interviews.
- May 1st to 15th June-90 interviews.
- June 25th to 22nd August-240 interviews.

2.1.2 Shetland Residents

A total of 1,201 telephone interviews were undertaken with Shetland residents. The interviews were weighted by place of residence in order to achieve a broadly representative sample in terms of geographic distribution.

Residents were asked questions about their most recent trip outside Shetland. Therefore, the interviews were undertaken at different times of the year in order to try and avoid any bias towards, for example, use of certain transport modes at certain times of year.

The interviews were undertaken in three equal tranches across the following dates in 2008:

- March 6th to April 18th.
- May 1st to 15th June.
- June 25th to 22nd August.

2.2 ON-LINE SURVEY OF ACTUAL AND POTENTIAL VISITORS

A survey was undertaken of those who had requested a brochure about Shetland from VisitScotland. The transport-related questions were one part of what was a larger survey, with other questions asked on behalf of Shetland Islands Council (SIC). The survey was administered by a third party consultancy on behalf of ZetTrans and SIC.

The online survey ran during April and May 2008. A total of 1,407 usable responses were received. The raw survey data were passed to us from the third party consultancy.

2.3 BUSINESS SURVEY

A total of **30** Shetland businesses were surveyed. Of these, 19 were interviewed face-to-face with the other 11 interviewed by telephone. The sample from which the businesses were drawn aimed to produce a broadly representative response, in terms of sectoral and geographic distribution within Shetland. However, as some businesses chose not to participate the final sample was, to an extent, self-selecting.

The initial sample was compiled by *Reference*. It was then expanded based on comments received from SIC's Economic Development Unit.

2.4 CONSULTATIONS

The consultations provided additional information of value to the study. In total, **13** organisations were consulted-either face-to-face, telephone or online. They are listed at **Appendix B**.

3 SHETLAND RESIDENTS

3.1 INTRODUCTION

This Chapter presents the main findings of the telephone surveys with Shetland residents. To make the results meaningful, interviews were undertaken only with residents who had made at least one trip from Shetland in the previous 12 months on the Northlink ferry services and/or scheduled air services.

References are made to geographic areas within and outwith Shetland. These areas are shown in the maps at **Appendix C**. Also note that where percentages are shown for results these relate to the proportion of the total sample unless otherwise stated.

The Chapter covers:

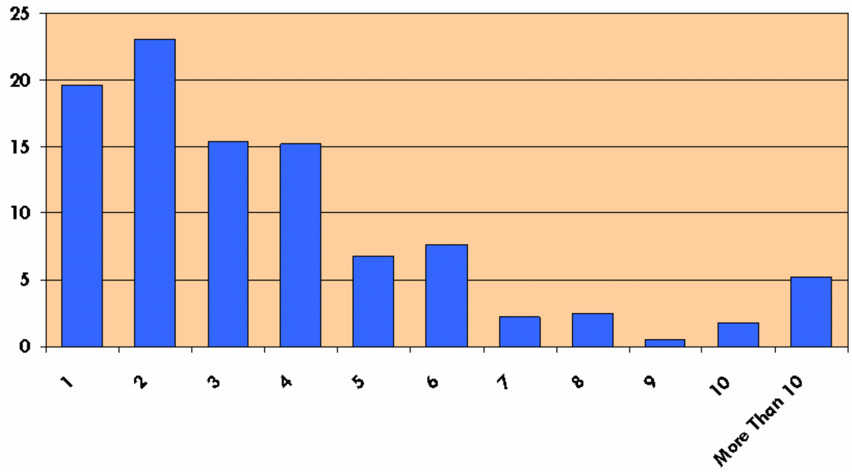
- Trip-making in the last 12 months.
- Most recent trip off Shetland-general.
- Most recent trip off Shetland-by air.
- Most recent trip off Shetland-by ferry.
- Views on Shetland's air and ferry services.
- Mainland port issues.
- The scheduled bus service to Sumburgh Airport.
- Consultations with NHS Shetland and further and higher education providers on the Scottish mainland.

3.2 TRIP-MAKING IN THE LAST 12 MONTHS

3.2.1 Frequency of Trip

All respondents were asked how many return trips they had made from Shetland in the last 12 months. The results are shown at **Figure 3.1**.

Figure 3.1: Residents: Number of Return Trips Off Shetland in Last 12 Months (% of Total Sample)



The average (mean) for the sample was around four (3.94) return trips. However, as **Figure 3.1** shows, more than half (58%) of residents made less than four trips. The vast majority(83%) made up to five trips. The median was 2-3 trips.

Among those with the highest frequency, 10% had made eight or more trips. In general, those who are retired make fewer trips than other residents.

3.2.2 Trips to Orkney

Unsurprisingly, the vast majority of trips were to the Scottish mainland and points beyond. Of all the trips made by the sample, 96% were to the Scottish mainland and beyond, with only 4% to Orkney.

Nevertheless, one in ten of the sample had made a trip to Orkney in the last 12 months. In most (75%) of cases, however, those travelling to Orkney had made only one return trip during that time.

3.2.3 Modal Split

Air Versus Ferry

Residents make more trips by air than by sea. Of the average of 3.94 return trips off Shetland per year:

- 2.30 trips (58%) are made by air.
- 1.64 (42%) are made by ferry.

Use of Ferry

Within the last 12 months, 27% of residents had made no trips off Shetland by ferry. Of those who had travelled by sea most (71%) made 1 or 2 return trips. Almost all (95%) had made between 1 and 5 trips.

An issue for the research was the importance of Aberdeen City and Aberdeenshire as a final destination for trips made by ferry. The results are show that:

- Almost half (48%) of those who had used the ferry had made at least one ferry trip with a final destination in either Aberdeen or Aberdeenshire. This equates to 35% of the entire sample-that is, including those who had not made a ferry trip in the last 12 months.

- Some 43% of all ferry trips off Shetland had a final destination in either Aberdeen City or Aberdeenshire.

- Among the entire sample, 42% reported having friends and/or relatives who are normally resident in Aberdeen City. A similar figure (38%) was reported for Aberdeenshire.

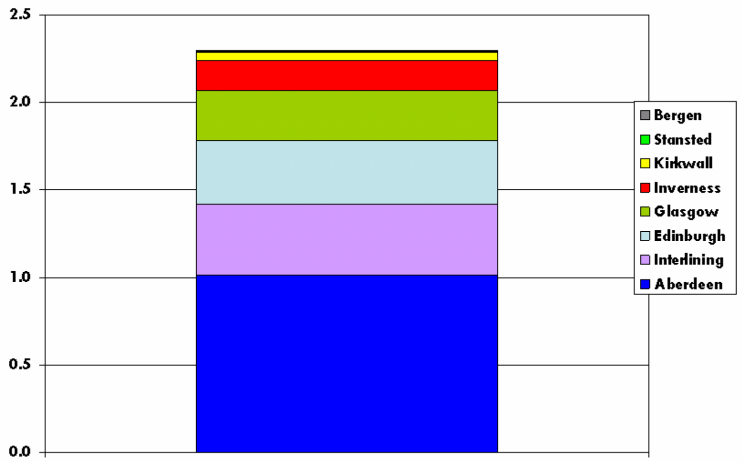
Use of Air

Within the last 12 months, 30% of residents had made no trips off Shetland by air. Those most likely not to have flown were those aged 55 years or above; and those who are retired.

Those who use air tend to travel more frequently than those who use the ferry. Slightly over half (57%) made either 1 or 2 flights. Some 13% of flyers made more than 5 flights off Shetland.

Figure 3.2 provides a breakdown of the total sample's flights in the last 12 months by final destination airport.

Figure 3.2: Residents: Air Trips (Average Number Per Annum)
By Final Destination Airport



Of the 2.30 return trips per resident per annum, around 1.00 is a flight that terminates at Aberdeen Airport. A further 0.40 flights per resident involve interlining over one of the airports served directly from Shetland. The most popular other final destination airports are Edinburgh (0.36 return trips per resident) and Glasgow (0.29).

Clearly, Aberdeen is the most important airport. It accounts for 43% of all flights taken by residents. Almost two thirds (64%) of those who had made a flight in the last 12 months had made at least one to Aberdeen. While use of Edinburgh was greater than use of Glasgow, very similar numbers made at least one flight to each airport.

3.3 MOST RECENT TRIP OFF SHETLAND: GENERAL

3.3.1 Modal Choice

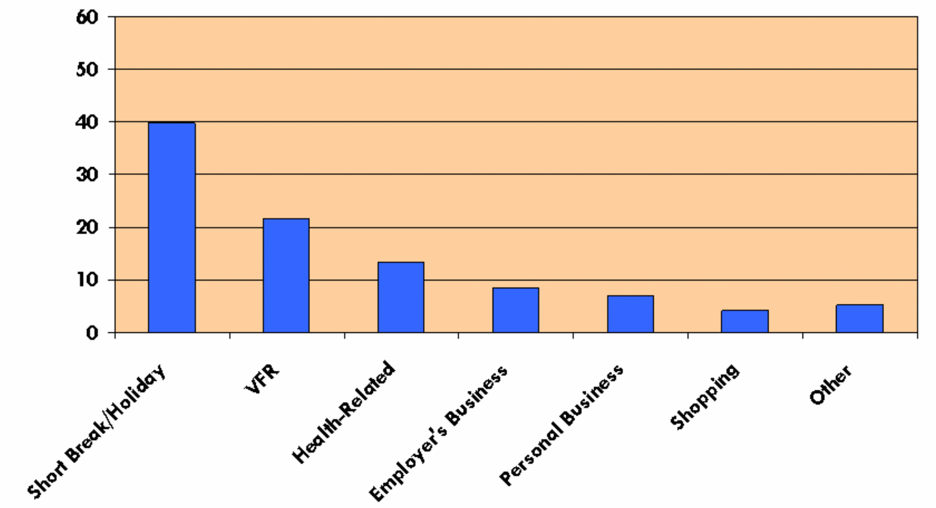
All residents were asked about their most recent trip off Shetland. In these, a slight majority used air rather than ferry. Exactly half (50%) used air for both the outward and return leg of their journey. Slightly fewer (48%) used the ferry in both directions. Very (2%) few used different modes for the outward and return legs.

3.3.2 Trip Purpose

All

Figure 3.3 shows the main purpose of each resident's most recent trip off Shetland.

Figure 3.3: Residents: Main Purpose of Most Recent Trip Off Shetland (% of Total Sample)



Non-work purposes are prevalent. They account for 91% of the most recent trips.

Among the sample as a whole the main purposes are Short break/Holiday (40% of the whole sample) and VFR (Visiting Friends & Relatives) with 22%. The third most common purpose was Health-Related with 13%, followed by Employer's Business (8%).

By Mode

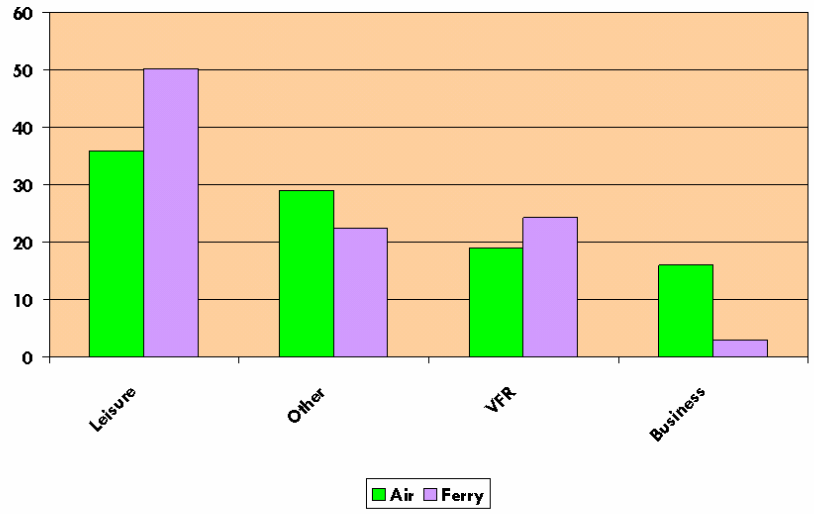
Figure 3.4, over, breaks down the broad purpose of the most recent trip by the transport mode used. It shows that the main differences between the modes are:

- While Leisure-related trips are the most important for both air and ferry, they are more important in terms of ferry.
- One in six trips by air were business-related. This compares to less than one in thirty made by ferry.

3.3.3 Party Size

The average (median) party size was between 1 and 2 people. Most (48%) parties had two people, while 28% had just one person.

Figure 3.4: Residents: Main Purpose of Most Recent Trip Off Shetland (% of Those Using Each Mode)



3.4 MOST RECENT TRIP OFF SHETLAND: BY AIR

3.4.1 Introduction

Interviewees who had made their most recent trip off Shetland by air provided information on:

- Trip duration.
- Journey to Sumburgh Airport.
- Booking.
- Routes and airports used.
- Onward travel from the destination airport.
- Trip destinations.
- Modal choice.

3.4.2 Trip Duration

10% made a day trip to mainland Scotland on the air services. The other 90% spent at least one night away from home outside Shetland. Very few (under 2%) stayed away from home in Shetland as part of their air trip to mainland Scotland.

Among those staying at least one night outside Shetland, the average (median) number of nights spent was between four and seven. Most (68%) spent between one and seven nights outside the islands. Some 13% spent more than two weeks away.

3.4.3 Journey to Sumburgh Airport

Origin Within Shetland

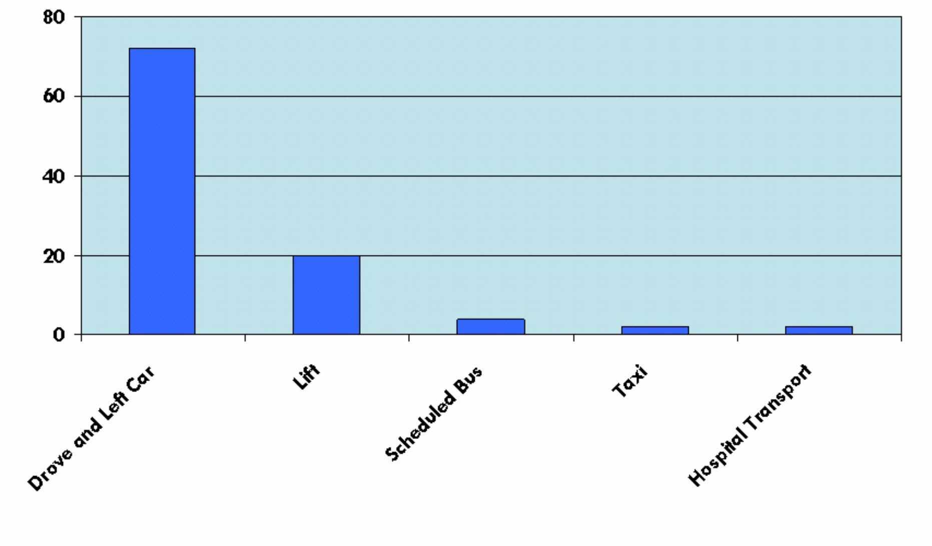
Almost all (97%) travelled from their home to Sumburgh Airport. Only 3% travelled from some other origin, such as their place of work.

Most travelled directly to the Airport. Less than one in ten (7%) broke their journey between the origin and the Airport. In most cases this was a stop in Lerwick.

Mode of Transport

Figure 3.5 shows the mode of transport used to arrive at Sumburgh Airport.

Figure 3.5: Residents: Mode of Transport To Sumburgh Airport (% of Respondents)



Private transport dominates. It accounts for over 90% of responses. In most cases (72% of all trips) residents drove to the Airport and left their car there. Relatively few (4%) of respondents used the scheduled bus service. Only 2% travelled by taxi.

3.4.4 <u>Booking</u>

Almost all (95%) of residents were able to book on their preferred flights in both directions of travel. Where this was not the case, people were usually able to get on their preferred flight in one direction.

Being unable to book on the preferred flight did not usually result in residents having to travel significantly earlier or later than planned. Only around one in four (equal to 1% of the total sample) were forced to alter their itinerary by more than 24 hours. In most cases people still travelled on the same day, with their flight times changed by no more than five hours.

3.4.5 <u>Routes and Airports Used</u>

The airports to which the residents flew were:

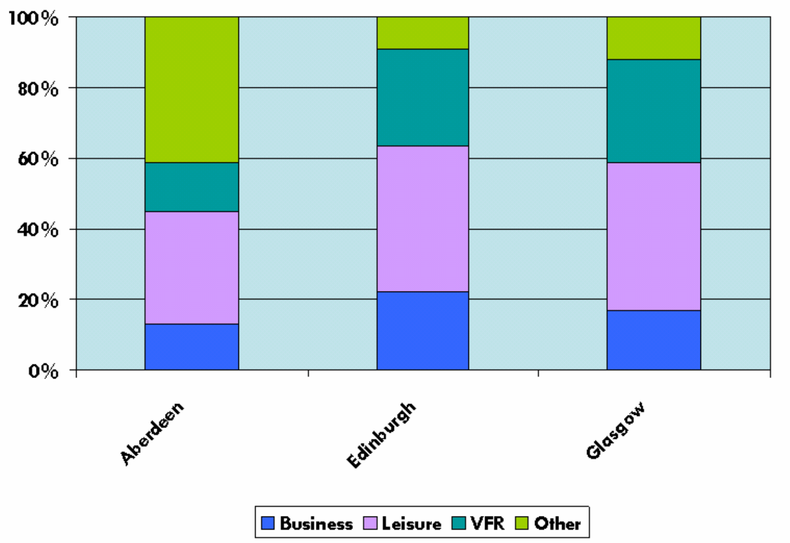
- Aberdeen: 61%.
- Edinburgh: 16%.
- Glasgow: 14%.
- Inverness: 6%.

- Kirkwall: 2%.
- Stansted: 1%.
- Bergen: less than 1%.

The distribution of flights by airport on the most recent trip is broadly similar to that for residents' total annual trips by air (which is shown at **3.2.3**).

Figure 3.6 shows residents' most recent trips on the three main air routes from Shetland by broad trip purpose.

Figure 3.6: Residents: Broad Trip Purpose on Main Air Routes



The main points to note are that:

- "Other" (encompassing Health-related, Personal Business, Shopping and Education) is the main category on the Aberdeen route. This route accounts for over 80% of all such air trips made by residents.
- In contrast, Leisure is the main broad trip purpose on the Edinburgh and Glasgow services.
- The share of trips accounted for by Business purposes varies between 13% (Aberdeen) and 22% (Edinburgh).

3.4.6 Onward Travel From The Destination Airport

Interlining

Some 22% interlined on their most recent air trip from Shetland. Those undertaking trips for Leisure purposes were most likely to do so.

Over two in three (72% interlined) on to another UK airport, with the other 28% connecting with a flight to an airport outside the UK. In total, almost half (47%) the interliners were flying onto one of the five London airports. Thus one in ten of all trips by Shetland residents were to a London airport.

The main airports mentioned were largely in England, as follows:

- Heathrow: 25% of those interlining.
- Gatwick: 14%.
- Manchester: 8%.
- Birmingham: 4%.

Onward Travel By Those Not Interlining

Those not connecting to another flight were asked what mode of transport they used for their immediate travel onwards from their destination airport. Taxi was the main one. It was used by 39% of the relevant respondents. A further 22% got a lift and 18% used a scheduled bus. Around one in eight (12%) used a hire car, either as a driver or passenger.

Use of A Shuttle Bus Between Aberdeen Airport and Dyce Railway Station

Those flying to Aberdeen Airport and travelling onwards by either taxi or walking were asked if they would have considered using a shuttle bus to travel to Dyce rail station to connect with onward rail services.

Around one in four (26%) of these respondents stated they would do so. Of those who stated that they would **not** this was mainly because they were not travelling onwards by train (51% of relevant respondents). A further 20% were travelling onwards by train but stated that they would prefer to take a taxi or walk.

The overall results show that around one in ten of **all** residents flying from Sumburgh to Aberdeen Airport would consider using a shuttle bus to Dyce station.

3.4.7 <u>Trip Destinations</u>

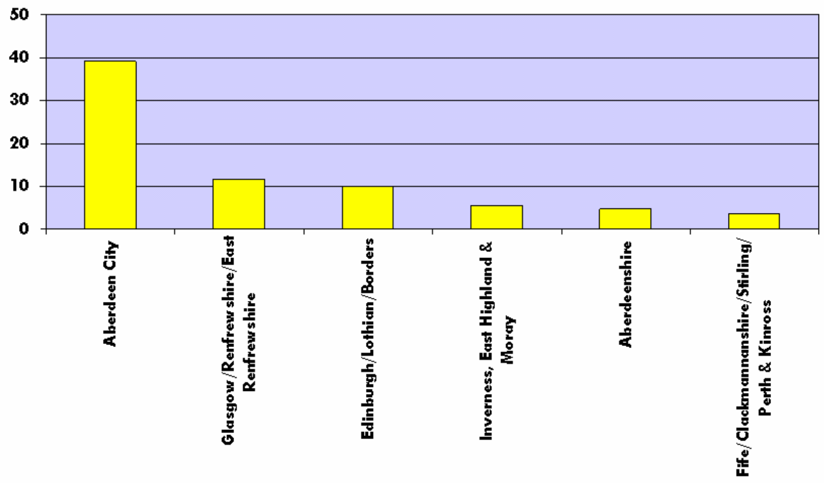
Respondents were asked where they stayed on the first night following their arrival on the mainland; or, in the case of those were making a day trip from Shetland, the main destination of their trip.

More than half (79%) had a trip end in Scotland, with the balance of 21% travelling to a destination outside Scotland on their first night/day trip.

The most common destinations in Scotland are shown at **Figure 3.7**, over. Aberdeen City is the main destination within Scotland and among all trips. It was the trip end for just under 40% of residents. The next largest within Scotland were Glasgow/Renfrewshire/East Renfrewshire (12%); and Edinburgh/Lothian/Borders (10%).

In total, 51% had a trip end in what could be termed the north/north east area broadly around Aberdeen-that is: Aberdeen City/Aberdeenshire/Inverness, East Highland & Moray/Dundee & Angus.

Figure 3.7: Residents: Where Stayed On First Night/Day Trip Destination (% of All Making Most Recent Trip By Air)



A further 26% had trip end in what might be termed central and southern Scotland: that is, from Fife/Clackmannanshire/Stirling/Perth & Kinross southwards.

The results shown at **Figure 3.7** include those making a day trip from Shetland. Within this specific group the vast majority (over 80%) had a destination in Aberdeen City.

Only 17% of residents had a final trip destination other than that where they spent their first night following their flight from Shetland. In most of these cases, residents had a final destination outside Scotland.

3.4.8 Modal Choice

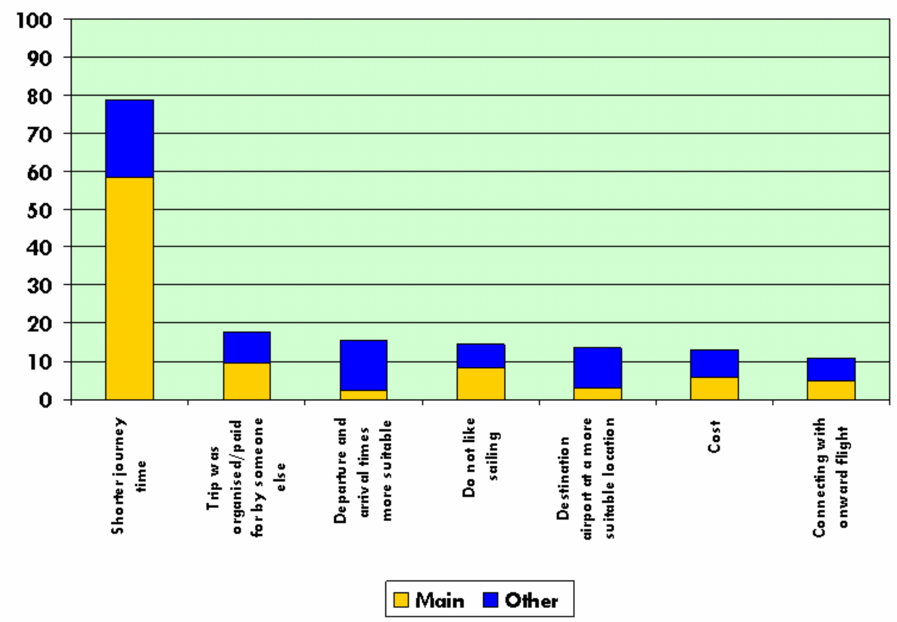
Respondents were asked why they chose air rather than ferry to make their most recent trip. They were asked to provide:

- The main reason.
- Other reasons.

The most common responses are shown at **Figure 3.8**, over.

The shorter journey time by air is clearly the key factor. It was the main reason given by more than half (58%). It was also given as an other reason by a further 20%. The next most common reason (the trip being organised/paid for by someone else) was mentioned by 18% of respondents in total.

Figure 3.8: Residents: Reasons for Choosing Air Rather Than Ferry for Most Recent Trip (% of Respondents)



3.5 MOST RECENT TRIP OFF SHETLAND: BY FERRY

3.5.1 Introduction

Interviewees who had made their most recent trip off Shetland by ferry provided information on:

- Trip duration.
- Journey to Lerwick ferry terminal.
- Vehicle accompaniment and use of cabins.
- Booking.
- Onward travel from the ferry terminals.
- Trip destinations.
- Modal choice.

3.5.2 Trip Duration

Excluding travelling overnight on the ferry, almost all (over 95%) residents spent at least one night outside Shetland. Very few (1%) stayed away from home in Shetland as part of their ferry trip to mainland Scotland.

Among those who spent at least one night outside Shetland, the average (median) number of nights lay between four and seven. Most (53%) spent a total of up to seven nights, and 85% spent up to 14 nights outside Shetland excluding overnight travel on the ferry.

3.5.3 Journey to Lerwick Ferry Terminal

Almost all (98%) began their trip to the Holmsgarth terminal from their home. The other 2% who started the trip from another place (e.g. place of work) all did so from Lerwick.

Table 3.1 shows the mode of transport by which residents arrived at Lerwick ferry terminal.

TABLE 3.1: RESIDENTS: MODE OF TRANSPORT TO LERWICK FERRY TERMINAL: MAIN RESPONSES	
Mode	**% of Respondents**
Vehicle being accompanied on the ferry	44%
Lift from another person	24%
Drove to terminal and left car	18%
Taxi	6%
Walk	3%
Scheduled bus-direct to the ferry terminal	2%

Private transport was clearly the main mode used. This was the case for 86% of residents, with the vehicle being accompanied on the ferry being the most popular response overall. In terms of public transport, 6% used a taxi with just 2% arriving directly by scheduled bus service.

3.5.4 Vehicle Accompaniment and Use of Cabins

Almost half (47%) of residents accompanied a vehicle on the crossing. Of these passengers, the vast majority (84%) were accompanying a car or motorbike. A further 10% were travelling with a coach/minibus.

Some 7% of residents were travelling to Kirkwall. As such, they did not require passenger accommodation on board.

Almost all (96%) of those sailing to Aberdeen occupied a cabin. Just 1% neither had a cabin nor booked reclining seats.

3.5.5 Booking

The vast majority (96%) of residents were able to travel on their preferred sailing in both directions. Where they were not able to do so, most were able to travel on their first choice sailing on one of the two legs.

The impact on travel itineraries was generally slight. Most of those unable to travel on their preferred sailing ended up sailing within one day of their intended date.

3.5.6 Onward Travel from Aberdeen and Kirkwall Ferry Terminals

Transport Mode

Interviewees were asked to state the form of transport they used for their immediate travel onwards from their destination ferry terminal (either Aberdeen or Kirkwall). The main mode was the vehicle accompanied on the ferry (47%). The other most common forms of transport were:

- Taxi: 18%.
- Walk: 14%.
- Lift: 8%.
- Coach: 5%.
- Scheduled bus: 4%.

Use of A Shuttle Bus Between Aberdeen Ferry Terminal and Aberdeen Railway/Bus Stations

Residents who had sailed to Aberdeen and travelled onwards by either taxi or walking were asked if, had one been available, they would have considered using a shuttle bus to Aberdeen rail station/Aberdeen bus station to connect with onward rail/bus services.

Approaching half (47%) would have considered using the shuttle bus, as follows:

- Yes-for travelling on by bus: 26%.
- Yes-for travelling on by rail: 21%.

Roughly the same proportion (51%) stated that they would **not** use a shuttle bus. This was due to either:

- That they were not travelling onwards from the rail or bus stations: 33%.
- Preferring to use a taxi or walk: 18%.

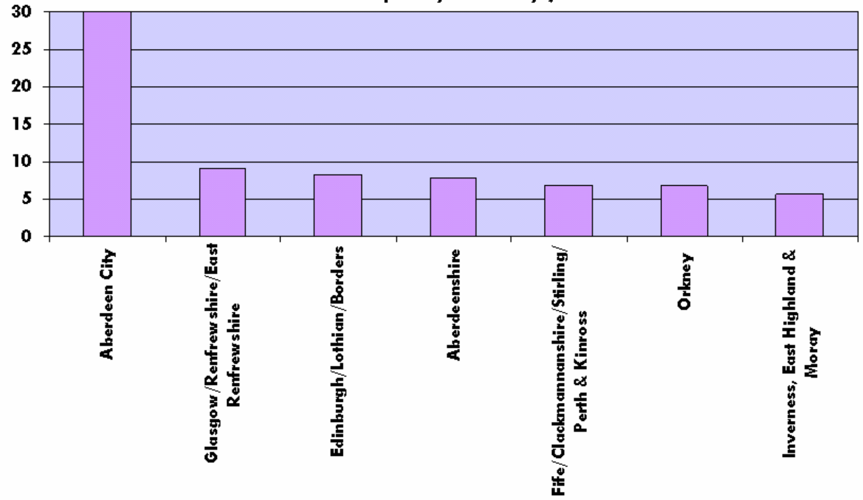
These results indicate that 16% of **all** residents sailing to Aberdeen would consider using a shuttle bus to connect with onward rail/bus services.

3.5.7 Trip Destinations

Respondents were asked where they stayed on the night following the sailing from Lerwick. Most (81%) stayed in Scotland. Within this, 4% of the total sample stated that the following night would be spent on board the ferry returning to Shetland.

The main destinations in Scotland are shown at **Figure 3.9,** over. They include the destinations for residents who travelled back to Shetland without spending a night on mainland Scotland.

Figure 3.9: Residents: Where Staying That Night in Scotland/Trip Destination (% of All Making Most Recent Trip By Ferry)



Aberdeen City is very clearly the main trip destination, reported by 30% of residents. This is followed by: Glasgow/Renfrewshire/East Renfrewshire (9%); and Edinburgh/Lothian/Borders (8%).

In total, 44% had a trip end in what could be termed the north/north east area broadly around Aberdeen-that is: Aberdeen City/Aberdeenshire/Inverness, East Highland & Moray/Dundee & Angus.

A further 27% had trip end in what might be termed central and southern Scotland: that is, from Fife/Clackmannanshire/Stirling/Perth & Kinross southwards.

A minority (27%) of residents had a final trip destination other than that where they spent their first night following their sailing from Shetland. In most of these cases, residents were travelling on to outside Scotland.

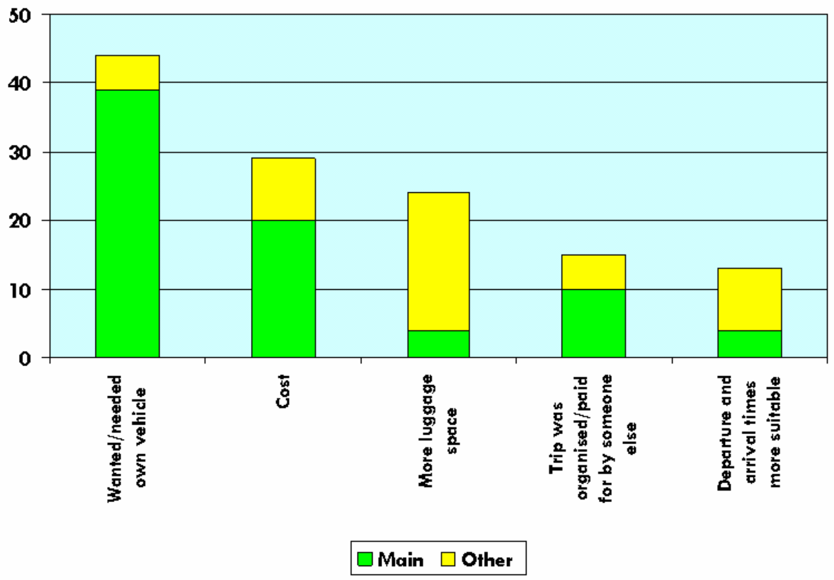
3.5.8 <u>Modal Choice</u>

Respondents were asked why they chose ferry rather than air to make their most recent trip off Shetland. They were asked to provide:

- The main reason.
- Other reasons.

The most common responses are shown at **Figure 3.10.**

Figure 3.10: Residents: Reasons for Choosing Ferry Rather Than Air for Most Recent Trip (% of Respondents)



The ability to travel with one's own vehicle was the most important factor. It was the main reason given by 39% and was mentioned by 44% of residents in total. The second most important factor was cost, which was mentioned by approaching 30% of respondents. Very few selected luggage space as the **main** reason for choosing ferry rather than air, but it was significant as an other reason.

3.6 VIEWS ON SHETLAND'S AIR SERVICES

3.6.1 Ratings

All residents who had made an air trip from Shetland in the last 12 months were asked to rate various facets of the air services as one of the following:

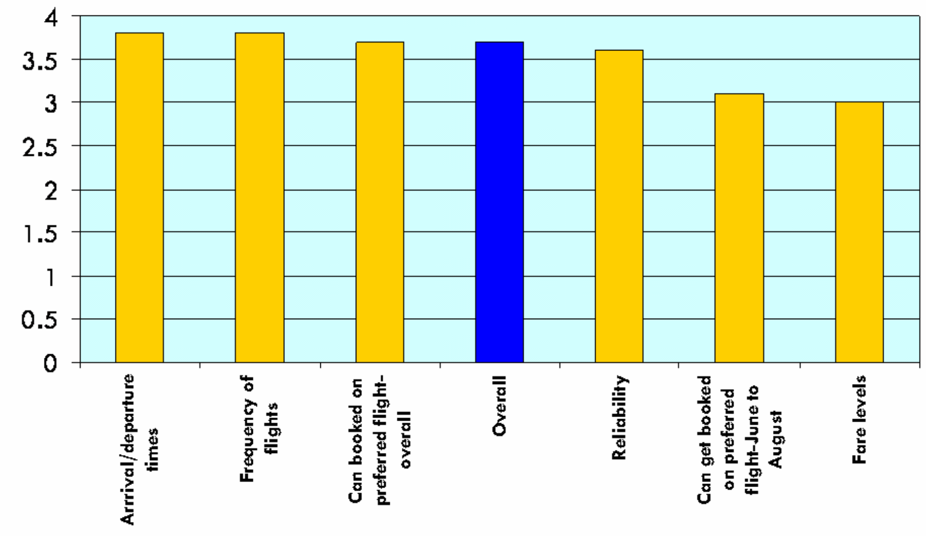
- Very Good.
- Good.
- Adequate.
- Poor.
- Very Poor.

Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses in each category as follows:

- Very Good-5.
- Good-4.
- Adequate-3.
- Poor-2.
- Very Poor-1.

Thus the higher the score the better the particular facet is rated. The results are shown at **Figure 3.11**.

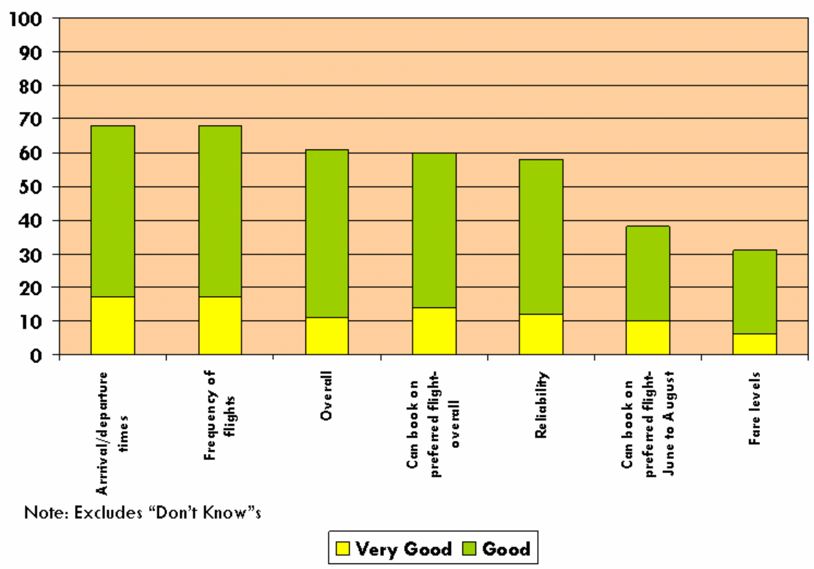
Figure 3.11: Residents: Rating of Air Service



The results are generally positive. All bar one of the facets are rated better than "adequate". The overall rating is, at 3.7, closer to "good" than to "adequate". Fare levels and the ability to get a booking in the midsummer months are the two least positively viewed aspects. Each are considered no better than "adequate".

Within the average scores there are variations around the mean. **Figure 3.12** shows the proportion of respondents who considered particular features of the air services either "very good" or "good".

Figure 3.12: Residents: Rating of Air Service Features As Very Good or Good (% of respondents)



Note: Excludes "Don't Know"s

Around 60% rate the overall service as either "good" or "very good". However, relatively few (11%) consider it to be the latter. This balance is true for the individual aspects where most people rate the service "good" rather than "very good".

The highest proportion of "very good" responses is 17% (arrival/departure times, and frequency). Fewer than one in three (31%) residents consider air fare levels to be "good" or "very good".

3.6.2 Potential New Air Routes

Residents were asked, for their trips outside Shetland, if there are any airports that would be useful which do not presently have flights to Shetland. A total of 236 suggestions were made regarding new airports. The main ones were:

- Manchester: 14% of suggestions.
- Heathrow: 10%.
- Wick: 8%.
- Gatwick: 8%.
- Birmingham: 6%.
- Newcastle: 5%.
- Norway (general): 5%.

In addition, 4% stated that they would like to see an extended Stansted service, while the same proportion would like to see an extended Bergen service.

3.7 VIEWS ON SHETLAND'S FERRY SERVICES

3.7.1 Ratings

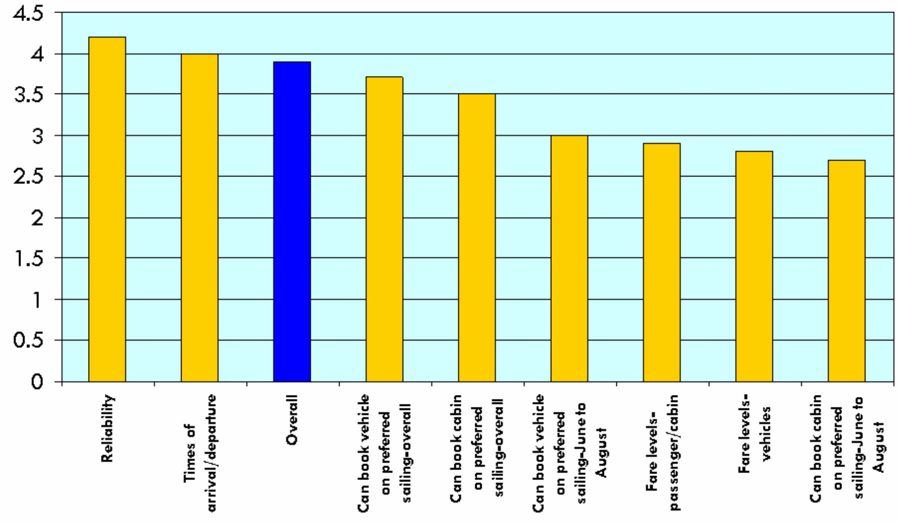
All residents who had made a ferry trip from Shetland in the last 12 months were asked to rate various facets of the services as one of the following:

- Very Good.
- Good.
- Adequate.
- Poor.
- Very Poor.

These were used to calculate average weighted scores, after excluding "Don't Know"s, on the same basis as for the air services (which is described at **3.6.1**).

The results are shown at **Figure 3.13.**

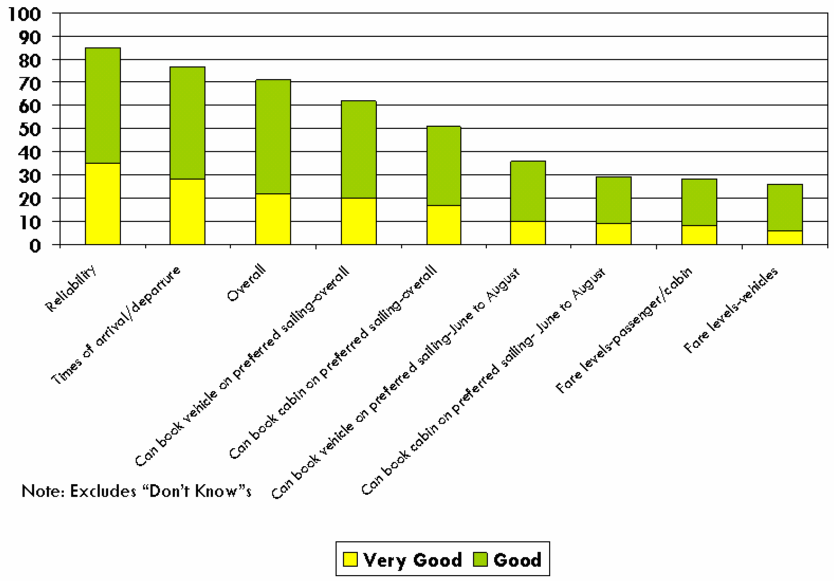
Figure 3.13: Residents: Rating of Ferry Service



Overall, the ferry service has a rating of 3.7: that is, closer to "good" than "adequate". The best regarded aspects are reliability and times of arrival/departure, The least regarded ones are fare levels and the ability to book either a vehicle or a cabin during the midsummer months.

Within the average scores there are variations around the mean. **Figure 3.14** shows the proportion of respondents who considered particular features of the ferry services to be either "very good" or "good".

Figure 3.14: Residents: Rating of Ferry Service Features as Very Good or Good (% of respondents)



Note: Excludes "Don't Know"s

A majority (71%) rate the overall service as either "good" or "very good", with 22% regarding it as the latter. Reliability and times of arrival/departure are rated as "good" or "very good" by over three quarters of residents. The lowest proportions are for fares.

3.7.2 Cabin Provision

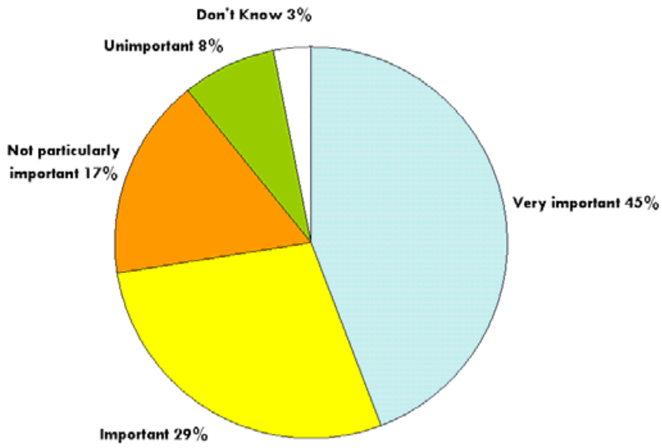
As suggested by the results, there are issues around the availability of cabins. Subsequent questioning showed that, despite the number of cabins on the ferries having been increased, over half (56%) think that there are still not sufficient spaces. Some 25% stated that there are sufficient spaces, while 19% were "Don't Know"s.

3.8 MAINLAND PORT ISSUES

3.8.1 Importance of Aberdeen as the Mainland Port

Residents were asked how important it was to them that the ferry service sails to Aberdeen rather than to another port on the Scottish mainland. The results are shown at **Figure 3.15**.

Figure 3.15: Residents: Importance of Ferry Service Sailing to Aberdeen Rather Than to Another Scottish Mainland Port



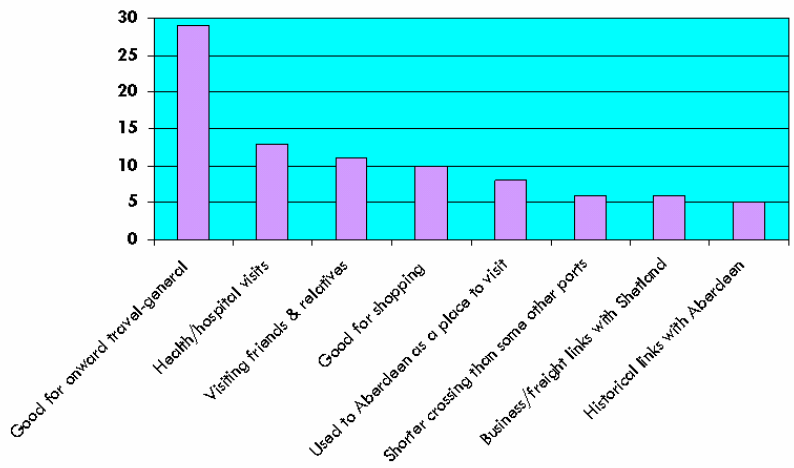
The results show the quite strong importance attached to Aberdeen. Around three quarters believe it to be very/important, with 45% of residents considering it to be very important. Around 25% consider Aberdeen to be either not particularly important or to be unimportant. Thus the ratio of important: lack of importance is around 3 to 1.

Those most likely to state "very important" were residents who are aged 55 year and over and those who are retired. In contrast, those who most recent trip off Shetland was Business-related were relatively unlikely to support this view.

Interviewees were asked to explain the reason for the response they gave. This was done on an open-ended basis. The responses were then grouped to allow analysis.

Figure 3.16 shows the most common responses for those stating that it is either "very important" or "important" that Aberdeen is the mainland port.

Figure 3.16: Residents: Reason Why Aberdeen is Very Important/Important (% of Respondents)



Base: Those stating that it is very important or important that Aberdeen is the mainland port

The main reason is Aberdeen offering good onward general transport connections (29%). This figure increases to over one in three (34%) responses if other references to public transport and Aberdeen Airport (which are not shown at **Figure 3.16**) are included.

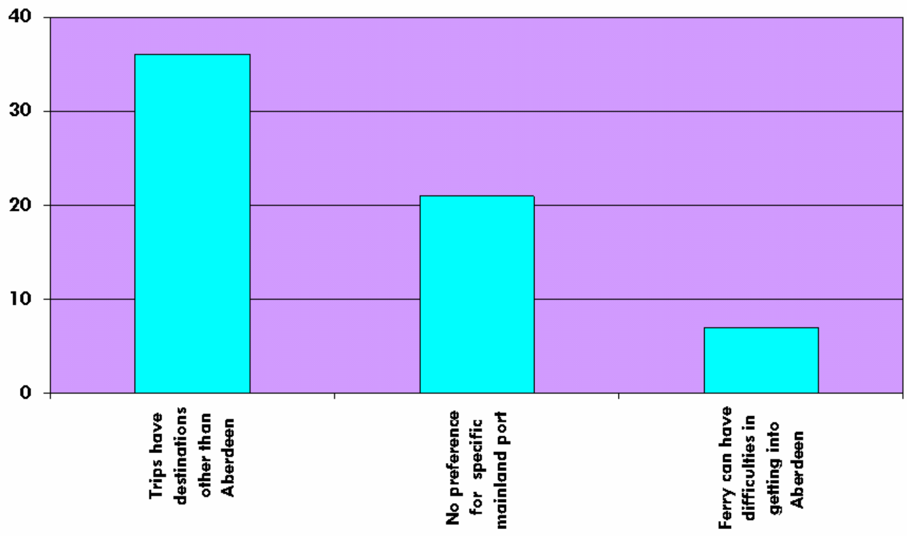
The next most important reasons relate to activities/facilities in Aberdeen. They included health, VFR and shopping.

Other reasons included familiarity with Aberdeen and historic links between the city and Shetland. Commercial links were also mentioned. Some 6% referred to Aberdeen offering a shorter crossing than some other potential mainland ports.

Figure 3.17, over, shows the most common reasons given by those stating that it is either "not particularly important" or "unimportant" that Aberdeen is the mainland port.

The main reason, cited by 36% of the relevant respondents, is that the trips that some residents make are to destinations other than Aberdeen City. A further 21% simply stated that they have no particular preference for a mainland port. A small proportion (7%) perceive that the ferry has occasional difficulties in getting into Aberdeen Harbour due to the tide/weather conditions at the time.

Figure 3.17: Residents: Reason Why Aberdeen is Not Particularly Important/Unimportant (% of Respondents)



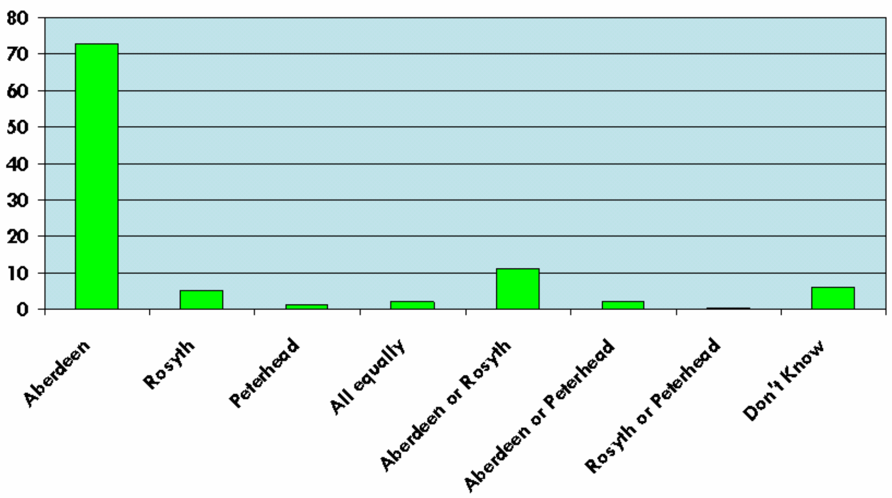
Base: Those stating that it is not particularly important, or unimportant, that Aberdeen is the mainland port

3.8.2 Views on Alternative Mainland Ports

Most Suitable Mainland Port

All residents were asked which, among a list of possible mainland ports, would be most suitable for serving Shetland and meeting the transport needs of residents, visitors, freight and livestock. The list encompassed Aberdeen, Rosyth and Peterhead. The responses are graphed at **Figure 3.18**.

Figure 3.18: Residents: Most Suitable Mainland Port For Shetland (% of Respondents)



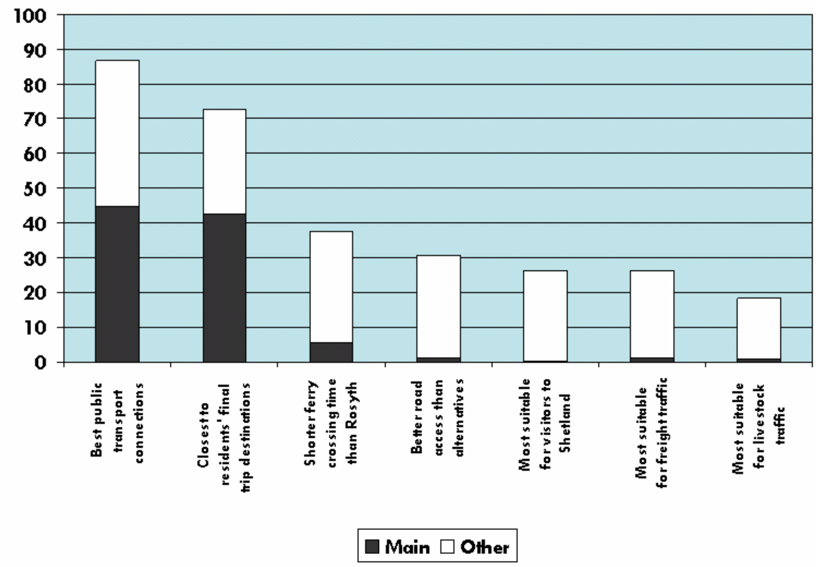
Residents are very clearly of the view that Aberdeen is the most suitable port. It was selected by almost three in four (73%). A further 11% believe that Aberdeen or Rosyth would equally suitable. Only 5% identified Rosyth alone, while Peterhead received very little support.

Again, those whose most recent trip to the mainland had been for Business-related purposes placed less emphasis on the importance of Aberdeen. Of these respondents, 19% believe that Aberdeen or Rosyth would be equally suitable, while 12% selected Rosyth alone. Nevertheless, 57% of the relevant respondents still viewed Aberdeen as the most suitable mainland port.

Reasons For Selection

Those selecting **Aberdeen** were asked to give reasons for their choice and then select the most important one. The most common responses are shown at **Figure 3.19**.

Figure 3.19: Residents: Reasons for Aberdeen Being the Most Suitable Mainland Port (% of Respondents)

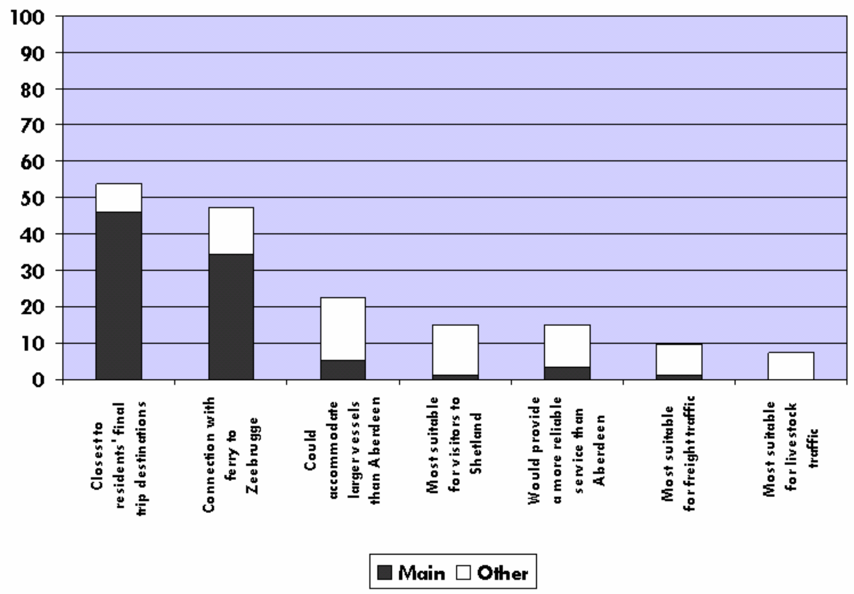


The main factors were clearly public transport (the main reason for 45% of relevant respondents) and being close to residents' final trip destinations (42%). Where interviewees did not mention these as the main reason they very often mentioned them as secondary factors.

All other main reasons were cited by less than 10%. However, in these cases quite a lot of respondents saw them as important secondary factors. In total, more than one third (38%) mentioned that Aberdeen would provide a shorter crossing time than Rosyth, while 31% saw Aberdeen as providing the best road access. There were also references to Aberdeen being the most suitable port for the movement of visitors, freight and livestock.

Figure 3.20 shows the most common reasons given by those who selected **Rosyth.**

Figure 3.20: Residents: Reasons for Rosyth Being the Most Suitable Mainland Port (% of Respondents)



For these individuals the two most common main reasons given were that Rosyth: is closest to the final trip destinations of Shetland residents; and that it offers a connection with the Zeebrugge ferry. Including "other" reasons each of these two factors was mentioned by over 40% of the relevant respondents.

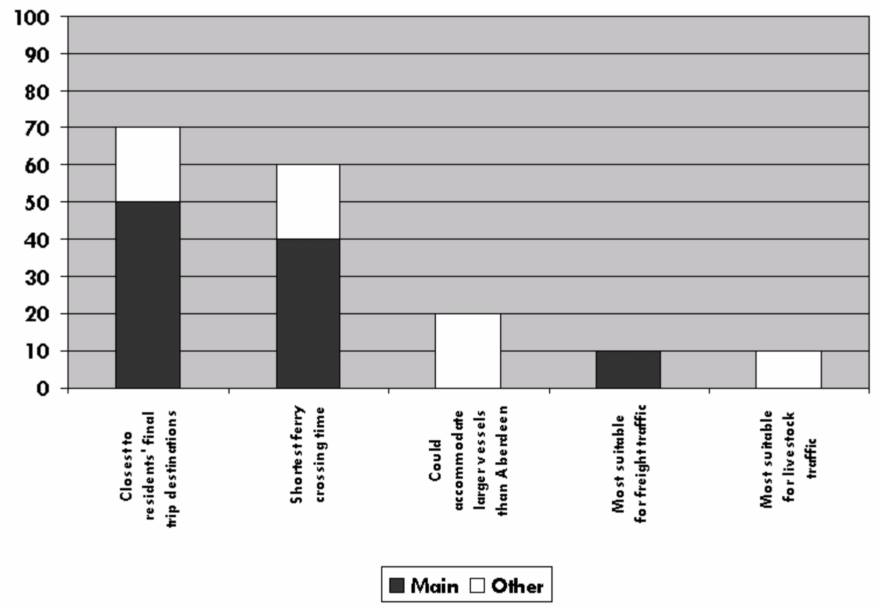
The other most commonly mentioned factor was that Rosyth could accommodate larger vessels than Aberdeen.

Peterhead

Figure 3.21, over, shows the most common responses for those stating that **Peterhead** is the most suitable mainland port.

The most popular response is, again, that the port is closest to the final destinations of residents' trips. The second most common factor was that Peterhead could offer the shortest crossing time.

Figure 3.21: Residents: Reasons for Peterhead Being the Most Suitable Mainland Port (% of Respondents)



Aberdeen or Rosyth Equally Suitable

As shown at **Figure 3.18,** a small proportion of residents stated that Aberdeen and Rosyth would be equally suitable as the mainland port for Shetland. The most common reasons given for this were:

- Some trip ends are in/near to Aberdeen City while others are nearer to Rosyth: 35%.
- Both are equally good for onward travel to the final destination: 27%.
- Aberdeen is generally the preferred port but Rosyth would be better for berthing in bad weather and /or accommodating larger vessels: 12%.
- Would like a service that uses both ports: 7%.

Further Information Requirements

The overwhelming majority (91%) stated that they do not need any further information to make a decision about the most suitable mainland port. For the rest, the main types of information sought for ports other than Aberdeen were:

- Onward travel connections: 34%.
- Sailing departure/arrival times: 13%.
- Sailing reliability: 11%.

3.9 SCHEDULED BUS SERVICE TO SUMBURGH AIRPORT

3.9.1 Introduction

Residents who have flown to/from Sumburgh Airport in the last 12 months were asked some questions about the Airport's scheduled bus service.

3.9.2 Use of the Bus Service

Fewer than one in five (18%) had used the bus service. They were generally satisfied with it. Some 30% were "very satisfied" with a further 45% being "quite satisfied". Only 14% of users were in some way dissatisfied with the bus service, with just 3% being "very dissatisfied".

Those who had used the bus service were asked if any aspects of it need to be improved. Their main responses were:

- Timings of arrival/departure at Sumburgh Airport: 51% of bus users.
- Time of arrival/departure elsewhere in Shetland: 20%.
- Availability of timetable information: 11%.
- Arrival/waiting facilities at Sumburgh Airport: 11%.

Thus the main issue is service timings.

3.9.3 Non Users

Those Who Considered Using The Bus Service

Very few (9%) of those who had **not** used the bus service had considered using it. Among those who had considered doing so, the main reasons for not using the service were:

- Timings of arrival/departure at Sumburgh: 40%.
- Prefer/need own car or had a lift: 39%.
- Bus pick up point too far from trip origin in Shetland: 18%.

Those Who Did Not Consider Using the Bus Service

The main reasons why people did not consider using the bus service are shown at **Table 3.2**.

TABLE 3.2: RESIDENTS: "WHY DID YOU NOT CONSIDER USING THE BUS SERVICE TO SUMBURGH AIRPORT"? : MAIN RESPONSES	
Response	**% of Respondents**
Car/lift more is convenient	56%
Do not live on the bus route to the Airport	19%
Bus times are not suitable	18%
Had a lot of luggage	5%

Base: Those who did not consider using the bus service

The most common response relates to the convenience of different modes, rather than to the specific characteristics of the Airport bus service.

3.9.4 Changes That Could Increase Use of the Bus Service

All those who had flown to/from Sumburgh Airport in the last 12 months were asked what, if any, changes to the scheduled bus service would make them more likely to use it. Most (74%) respondents said "none".

The main changes that could increase usage were:

- Connect with more/all flights: 11% of all who had flown from Sumburgh.
- More frequent service: 4%.
- Guaranteed to wait for all inbound flights: 4%.

3.10 OTHER COMMENTS

Finally, residents were asked if there were any other comments they would like to make about transport services to/from Shetland. As might be expected a very wide range of responses was provided. The main comments related to the cost of travel, as follows:

- Fares too high-general: 16% of all interviewees.
- Air fares too high: 5%.
- Ferry fares too high: 3%.

The main other areas seen as requiring improvement, each mentioned by 2% of all interviewees, were:

- On board facilities on the ferries.
- Ferry timetabling.
- Public transport connections at airports/ferry terminals.

3.11 CONSULTATION FINDINGS

3.11.1 Health

The main points made to us by NHS Shetland were that:

- Patients travelling off Shetland for treatment travel to a range of destinations in Scotland. However, most go to Aberdeen. Facilities in Edinburgh and Glasgow tend to be used for very specialist treatment. Those travelling to these two cities are disadvantaged by the limited number of flights relative to Aberdeen. However, the ability to fly to a range of Scottish airports from Shetland is seen as important.
- There is a lack of integration between internal transport services and the external services from Lerwick and Sumburgh.
- Most patients' complaints are about transport providers' responses when flights or sailings are delayed on the return leg from the mainland.

- Patients are less likely to use the boat in the winter. However, it is sometimes not possible for a patient to travel by air due to the nature of treatment received.
- In the last twenty years, use of air services for patient travel has increased relative to use of the ferry. This is due to the quicker journeys possible by air.
- The main link for visiting medical staff is the ferry service from Aberdeen. If ferry services were no longer available from Aberdeen this would be problematic. Medical staff in Edinburgh do not have the spare capacity to serve Shetland. Staff could be accessed from Inverness but this would be more expensive than present arrangements using staff from Aberdeen.

3.11.2 Education

Information provided by Aberdeen College and The Robert Gordon University (RGU) show that in the current academic year they have a collective total of 67 students from Shetland.

RGU stated that they regularly have students on work placements in Shetland, notably for those studying nursing, physiotherapy, etc. These placements are of value not only to the students but to the Shetland health teams. Further, placement students are more likely to return to Shetland upon graduation and fill roles in health provision.

In addition to the movement of placement students between Aberdeen and Shetland, there is also travel by academic staff who are required to visit the students and assess their progress.

RGU made the following points about current transport services:

- The costs of the current transport services are perceived to be very high, both in terms of money and time.
- Flights do not run early enough in the morning or late enough in the evening to allow staff to travel up and down on the same day.
- Onward transport connections are limited on arrival at Lerwick. Taxi costs are very high and car hire is not available to drivers under the age of 25.
- Aircraft capacities do not allow placement students to transport much in the way of luggage or possessions.
- Ferry services are perceived to be better value overall than the flights. The onward connections are easier from the ferry terminal than from Sumburgh. However, the ferry is much slower and potentially liable to disruption due to bad weather.
- There would be significant additional costs (financial and time) for students and staff were transport links moved away from Aberdeen.

4 VISITORS TO SHETLAND: FACE-TO-FACE SURVEYS

4.1 INTRODUCTION

This Chapter reports the main findings of the face-to-face surveys of visitors to Shetland. It reports the findings separately for those departing by air and those departing by ferry.

References are made to geographic areas within and outwith Shetland. These areas are shown in the maps at **Appendix C**. Please note that where percentages are shown for results these relate to the proportion of the total samples unless otherwise stated.

4.2 VISITORS DEPARTING BY AIR

4.2.1 Introduction

This section reports the main findings for visitors who were interviewed when departing Shetland by air from Sumburgh Airport. It covers:

- Profile of survey respondents. Further data are shown at **Appendix A**.
- Trip-making to Shetland.
- Characteristics of the trip being made at the time of interview.
- Travel onwards from the destination airport.
- Travel to Sumburgh Airport on the day of departure.
- The trip to Shetland.
- Views on Shetland's air services.

4.2.2 Profile

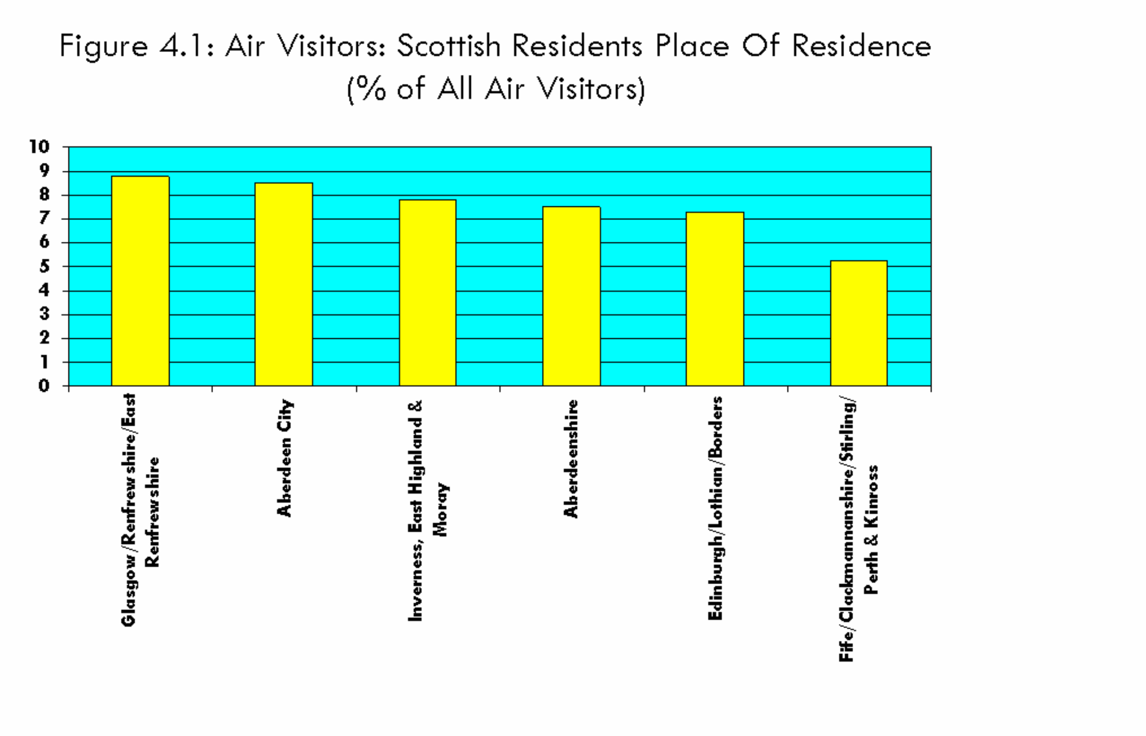
Slightly over half (57%) of the visitors surveyed were residents of Scotland. Of the rest, most were resident elsewhere in the UK (31%). Around one in eight visitors (12%) lived outside the United Kingdom.

Figure 4.1, over, shows the main places of residence for Scottish visitors. These are quite widespread. The main one is Glasgow/Renfrewshire/East Renfrewshire which accounted for around 9% of the total sample, with a similar level for Aberdeen City.

Most Scottish residents (44% of the total sample) lived outside the Highlands & Islands. A small amount (3%) were residents of Orkney.

In total, around 27% lived in what could be termed the north/north east area broadly around Aberdeen-that is: Aberdeen City/Aberdeenshire/Inverness, East Highland & Moray/Dundee & Angus. A similar proportion lived in what might be termed central and southern Scotland: that is, from Fife/Clackmannanshire/Stirling/Perth & Kinross southwards.

Party size was generally small. More than half (59%) were travelling alone. Around one in four (28%) were in a party of two.



4.2.3 Trip-Making to Shetland

All Trips to Shetland

Over one in three (36%) visitors were on their first trip to Shetland. This was particularly the case for those on a Short-Break/Holiday, 71% of whom had never previously visited. Most others had either previously made:

- More than ten trips (24%); or
- Between three and five trips (12%).

The average (median) number of previous trips was two.

Flights To Shetland Within The Last Twelve Months

Respondents were asked to state, including their present trip, the number of return flights they had made to Shetland in the last 12 months.

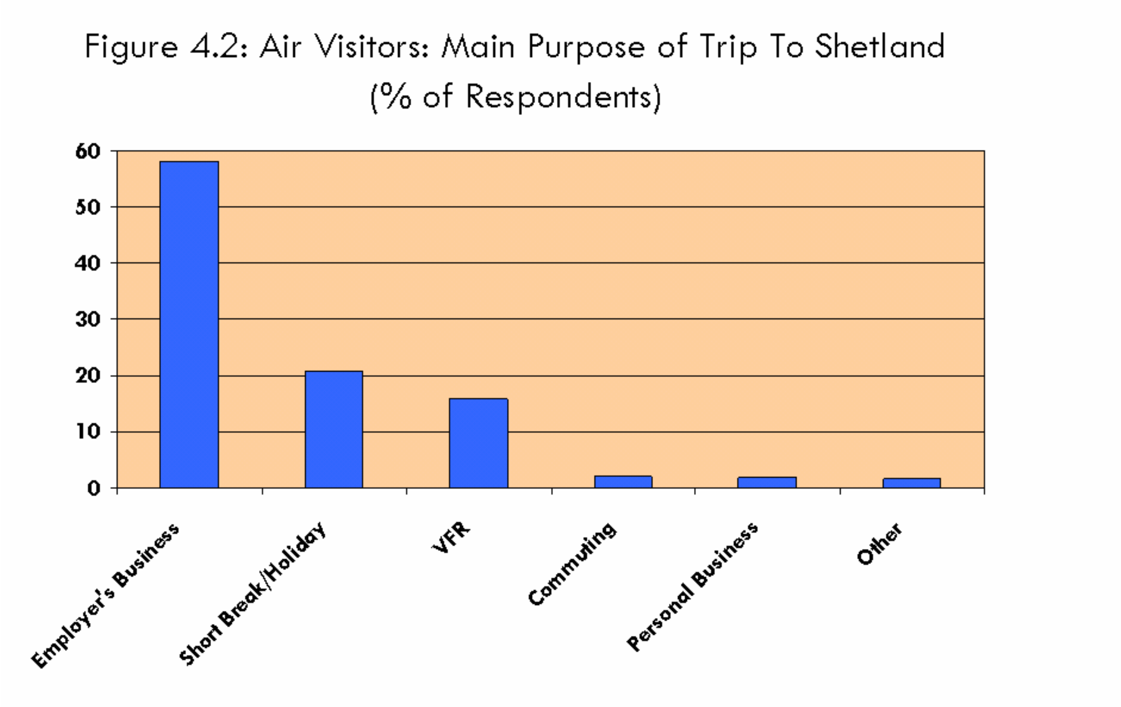
Most (57%) had made only one flight-that is, the one being made at the time of interview. A further 17% had made a total of two return flights. Few respondents were very frequent flyers. One in eight had made six or more flights, while only one in sixteen had made 12 or more flights.

The mean number of trips for the sample was around three.

4.2.4 Trip Characteristics

Purpose and Length of Stay

Figure 4.2 shows the main purpose of respondents' trip to Shetland.



Employer's Business was by far the most common purpose. It accounted for 58% of respondents. The main other categories were Short Break/Holiday (21%); and VFR (16%). No other single category accounted for more than 2%. In total 60% of trips were work-related..

The vast majority (87%) of visitors stayed at least one night in Shetland. Only 13% were making a day trip.

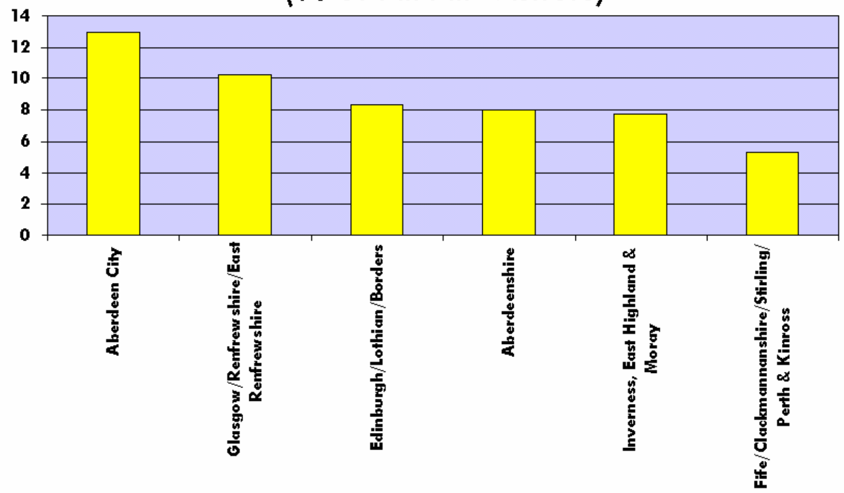
Trip Destination

Respondents were asked where they would be staying that night. Two thirds (67%) were staying in Scotland. This compares to 57% having a place of residence in Scotland (as stated at **4.2.2**). This show some of those who live outside Scotland were staying at least one night in Scotland before travelling back home.

One in three visitors (33%) were staying outwith Scotland that night. The figure for those on Holiday/Short Break (58%) was markedly higher.

Figure 4.3 shows the most common areas where visitors were staying that night in Scotland.

Figure 4.3: Air Visitors: Where Staying That Night In Scotland
(% of All Air Visitors)



The main destinations were Aberdeen City (13%); and Glasgow/Renfrewshire/East Renfrewshire (10%.). In total, 14% were staying in the Highlands & Islands. Within this group, 4% were staying in Orkney.

Slightly more (32%) were staying that night in the north/north east area broadly around Aberdeen than in central and southern Scotland (28%).

For the vast majority (87%) where they were staying that night was the final destination for their trip. Those were travelling onwards the following day tended to be non-Scots who were travelling on to places outside Scotland.

4.2.5 Travel Onwards From Destination Airport

Interlining

Around one in four (28%) were connecting with an onward flight (i.e. "interlining"). Those who were on a Holiday/Short Break and/or who were not Scottish residents were more likely to be doing so than the sample as a whole.

Most (80%) interliners were connecting to a flight to another UK airport. 41% of all interliners were flying onwards to one of the London airports. Thus over one in ten air visitors departing Shetland were flying to London. The most common individual airports were:

- Heathrow: 19% of those interlining.
- Manchester: 8%.
- Birmingham: 7%.
- Southampton: 6%.

Onward Travel By Those Not Interlining

Those not connecting to another flight were asked about the mode of transport for their immediate travel from their destination airport. Half (51%) would be driving their own car, with a further 12% getting a lift. The main other mode was taxi (26%). Relatively few (8%) would be using a scheduled bus service.

Use of A Shuttle Bus Between Aberdeen Airport and Dyce Railway Station

Those flying to Aberdeen Airport and travelling onwards by either taxi or walking were asked if they would consider using a shuttle bus to Dyce rail station to connect with onward rail services. Approaching half (45%) of these respondents stated they would do so. Of those who stated that they would **not** this was because either:

- They were not travelling onwards by train (24% of relevant respondents); or
- They would prefer to take a taxi or walk (23%).

These results indicate that around one in five (19%) of **all** Sumburgh-Aberdeen Airport passengers would consider using a shuttle bus to Dyce station.

4.2.6 Travel to Sumburgh Airport

Origin Within Shetland

Respondents were asked where in Shetland they had begun their trip to Sumburgh Airport on the day of interview. Most (68%) started in Lerwick. The rest were spread fairly evenly throughout:

- Central mainland: 8%.
- South mainland: 8%.
- North mainland: 7%.
- Islands: 6%-mostly either Unst or Whalsay.

Most (78%) travelled directly to Sumburgh Airport without stopping off on en route Of the one in five (22%) who did stop this was at a wide range of locations. The most common ones were:

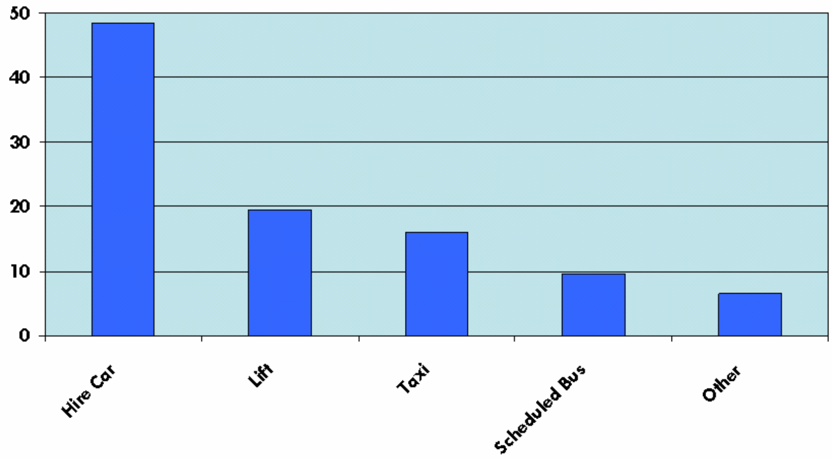
- Lerwick: 23% of those stopping en route.
- Sumburgh Head or Sumburgh Hotel: 12%.
- Scalloway: 7%.

A further 16% stopped at unspecified filling stations.

Mode of Transport

Figure 4.4 shows the mode of transport used to travel to Sumburgh Airport.

Figure 4.4: Air Visitors: Mode of Transport
To Sumburgh Airport (% of Respondents)



Most visitors used private transport. The most popular mode was Hire Car. This accounted for 49% of the sample; split between drivers (37% of the total sample) and passengers (12%).

A further 20% got a lift. Within the 6% classified as "Other" there were also some forms of private transport.

Around one in four (26%) used public transport. This were either: taxi (16%) or the scheduled bus service (10%).

Users of the Scheduled Bus Service

Compared to the sample as a whole those using the bus were more likely to be:

- Aged 55 or over.
- Male.
- On their first visit to Shetland.
- On a holiday/short-break.

In contrast, they were less likely to be:

- Aged 35-54.
- Female.
- A previous visitor to Shetland.
- Travelling to Shetland on business.

Those using the bus service expressed quite high levels of satisfaction. Over half (59%) were "very satisfied", with a further 26% being "quite satisfied". Only 3% of bus users (one respondent) were in any way dissatisfied.

Reflecting these positive findings, only around half (53%) of the bus users could identify aspects of the bus service that need improved. These were largely to do with the timetable as follows:

- Arrival/departure times at Sumburgh: 44% of all bus users.
- Timings of arrival/departure elsewhere: 13%.

Non Users of the Scheduled Bus Service

Those Who Considered Using The Bus Service

Of those who had not used the bus, very few (11%) had considered doing so. The main factors that stopped these people from using the bus related, again, to timetabling:

- Time of arrival at Sumburgh: 28% of those who had considered but not used the bus service.
- Time of departure from origin: 10%.

A further 10% did not use the service because they could not find out enough about it.

Those Who Did Not Consider Using the Bus Service

Those who did not consider using the bus service were asked why this was the case. Their main responses are reported at **Table 4.1**.

TABLE 4.1: AIR VISITORS: "WHY DID YOU NOT CONSIDER USING THE BUS SERVICE TO SUMBURGH AIRPORT"? : MAIN RESPONSES

Response	% of Respondents
Already had a car	26%
Did not think the timings would be suitable	13%
Had a lot of luggage	10%
Was not aware there was a bus service	10%
Got a lift	8%
Did not know enough about the bus service	5%

Base: Those who did not consider using the bus service

A wide range of responses were made. Around one in four stated that they already had access to a car, with a further 8% having organised a lift. Some visitors believed that the bus would not be suitable-either because of the timings (13%) or because they had a lot of luggage (10%).

Some 10% of the respondents (equating to 8% of all air visitors) were not aware that there was a bus service. A further 5% did not use the bus because they did not know enough about it.

4.2.7 The Trip to Shetland

Use of Modes and Airports

Almost all (92%) of the interviewees had also travelled **to** Shetland by air. Most visitors used the same airport outside Shetland on both legs of their journey.

Of the 8% who had arrived in Shetland by ferry, three quarters sailed from Aberdeen, with the rest sailing from Kirkwall.

Transport Mode to the Airport or Ferry Terminal

Around one in five (22%) used a connecting flight to travel to the airport from which they flew to Shetland. The others used the following modes to arrive at the airport or ferry terminal from which they travelled onwards to Shetland.

- Own car: 57% of relevant respondents.
- Taxi: 21%.
- Lift: 10%.
- Scheduled bus: 6%.
- Hire car-driver or passenger: 2%.

Thus the share of visitors using the Sumburgh Airport bus service (10%) compares favourably to that for travel to the airport or ferry terminal used for the inbound journey to Shetland.

Trip Origin

Visitors were asked to identify the location from where they travelled to the airport or ferry terminal. The results are very similar to those for the destination of the return leg of trips (shown at **4.2.4**). Thus most visitors were travelling to and from the same locations outside Shetland.

4.2.8 Views on Shetland's Air Services

Modal Choice

Respondents were asked why they chose to depart Shetland by air rather than ferry. By far the most common response was that air offered a shorter journey time. This was cited by 70% of respondents. The most common other responses were:

- Trip organised/paid by someone else: 10%.
- Don't like sailing: 6%.

Rating of Features of Shetland's Air Services

Respondents were asked to rate various facets of the air services as one of the following:

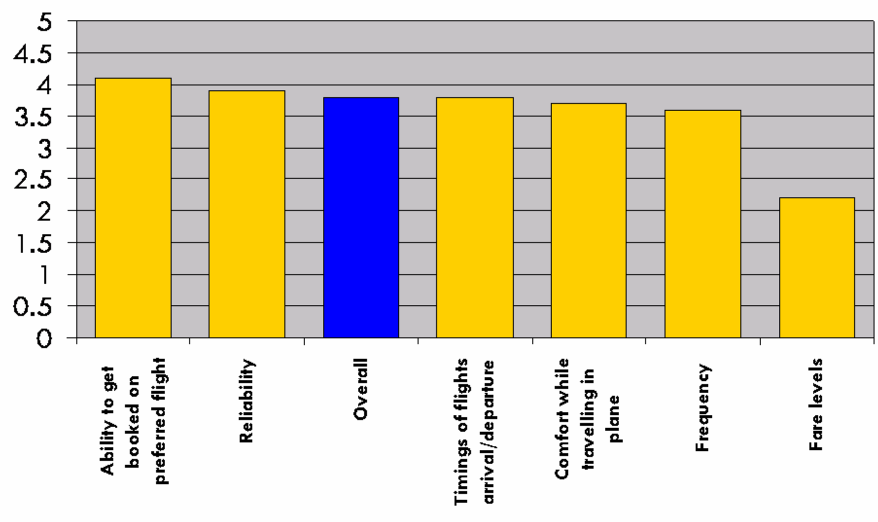
- Very Good.
- Good.
- Adequate.
- Poor.
- Very Poor.

Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses to each of the categories as follows:

- Very Good-5.
- Good-4.
- Adequate-3.
- Poor-2.
- Very Poor-1.

Thus the higher the score the better the particular facet is rated. The results are shown at **Figure 4.5**.

Figure 4.5: Air Visitors: Rating of Air Services

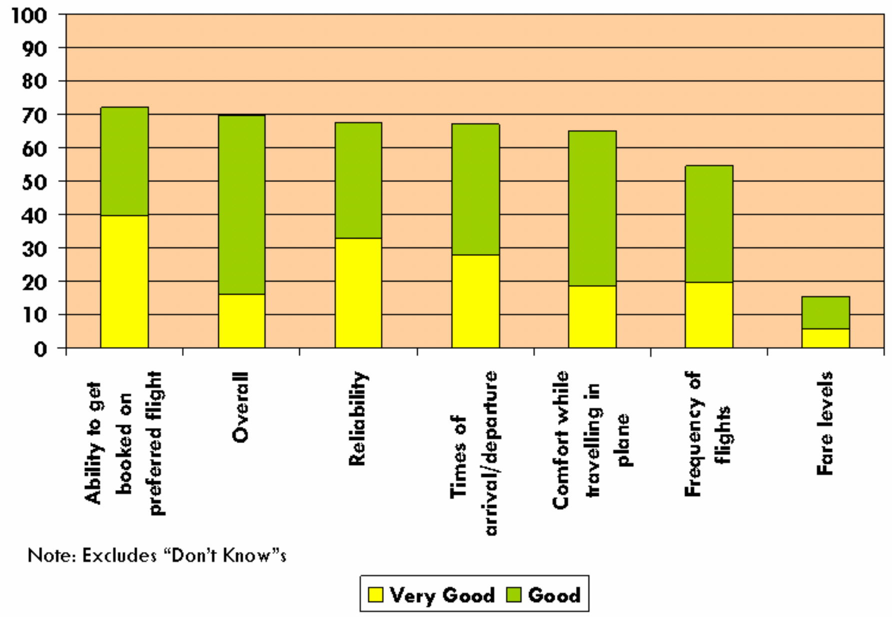


The results are generally positive. The service received an "overall" average rating of 3.8: that is, between "adequate" and "good", although much closer to the latter than the former. Ability to book on the preferred flight received the highest rating (4.1). All of the others scored between 3.5 and 4.0: that is towards "good"-except fare levels which was scored at 2.2. Almost half (49%) of the respondents perceived fare levels as either "poor" or "very poor".

Fare levels were most favourably regarded by those who live outside the UK and those on Holiday/Short Break. However, even these groups had an average rating of less than 3-that is, less than "adequate". Those with the least favourable view of fares were those travelling on Business and Highlands & Islands residents.

Within the average scores there are variations around the mean. **Figure 4.6** shows the proportion of respondents who considered particular features of the air services to be either "very good" or "good".

Figure 4.6: Air Visitors: Rating of Features as Very Good or Good (% of respondents)



Note: Excludes "Don't Know"s

The main points to note are that:

- The ranking of the various features fits closely with the average scores shown at **Figure 4.5**.
- All features were rated as "good" or "very good" by more than 50% of the respondents-apart from fare levels where the figure was 15%.
- Relatively few (16%) considered the overall service to be "very good".

Future Trips to Shetland

Most (66%) respondents stated that there was nothing about air services to Shetland that could deter them from making future visits.

Around one in three (31%) stated that they may be deterred. The figure was higher (44%) for those on a VFR trip. Interestingly, the figure was 29% for those on a business trip. This indicates that future business, as well as leisure, trips could be constrained by current air service provision.

Of those who could be deterred, the main factor was clearly fare levels. This was cited by over three quarters (76%) of relevant respondents. Thus fare levels could deter around one in four of **all** air visitors from making future visits to Shetland.

Those most likely to refer to fare levels were:

- 16-34 years old.
- Residents of Scotland outside the Highlands & Islands.
- Those travelling for VFR purposes.
- Those interviewed in the late June-August period.

Most visitors are satisfied with the current range of airports served from Sumburgh. Fewer than a quarter of the sample identified airports that would be useful to them which do not presently have direct flights. The most popular responses, each reported by 2% of the sample, were:

- Manchester.
- Birmingham.
- East Midlands.
- London Heathrow.

4.3 VISITORS DEPARTING BY FERRY

4.3.1 Introduction

This section reports the main findings for visitors who were interviewed when departing from Lerwick ferry terminal. It covers:

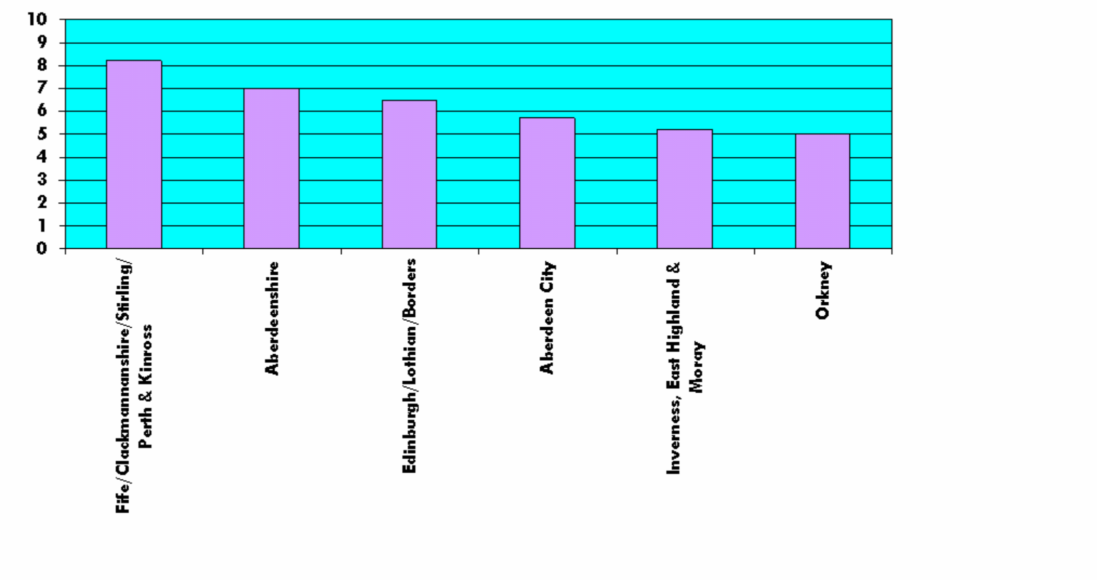
- Profile of survey respondents. Further data are shown at **Appendix A**.
- Trip-making to Shetland.
- Characteristics of the trip being made at the time of interview.
- Travel onwards from the destination ferry terminal.
- Travel to Lerwick ferry terminal on the day of departure.
- The trip to Shetland.
- Mainland port issues.
- Views on Shetland's ferry services.

4.3.2 Profile

Exactly half (50%) of the visitors surveyed were residents of Scotland. Of the rest, most were resident elsewhere in the UK (33%). Around one in six visitors (17%) lived outside the United Kingdom.

Figure 4.7 shows the most common places of residence for Scottish visitors.

Figure 4.7: Ferry Visitors: Scottish Residents Place Of Residence (% of All Ferry Visitors)



It shows a wide spread. The main areas are: Fife/Clackmannanshire/Stirling/Perth & Kinross (8% of the total sample); Aberdeenshire (7%); and Edinburgh/Lothian/Borders (6%). Most Scottish residents (37% of the total sample) lived outside the Highlands & Islands.

In total, some 22% lived in what might be termed central and southern Scotland: that is from Fife/Clackmannanshire/Stirling/Perth & Kinross southwards. Around 20% lived in what could be termed the north/north east area broadly around Aberdeen-that is: Aberdeen City/Aberdeenshire/Inverness, East Highland & Moray/Dundee & Angus.

Party sizes were generally small. They were mostly either 1 person (41%) or 2 people (40%).

4.3.3 Trip-Making to Shetland

All Trips to Shetland

Almost half (49%) of the visitors were on their first trip to Shetland. This was particularly the case for those on a Short-Break/Holiday, 70% of whom had never previously visited.

Most others had either previously made either:

- More than ten trips (16%); or
- A single trip (10%).

Ferry Journeys to Shetland Within The Last Twelve Months

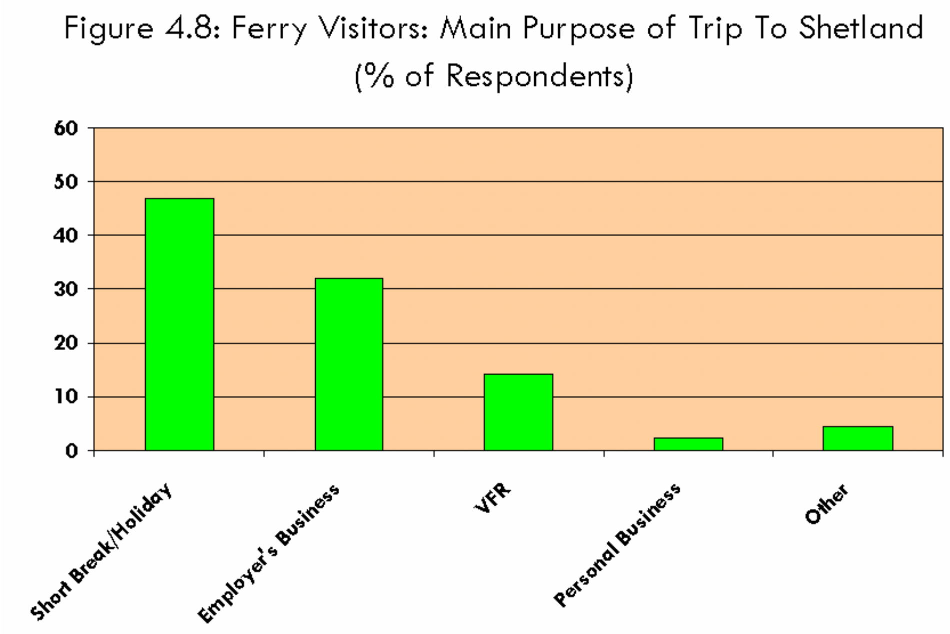
Respondents were asked to state, including their present trip, the number of return ferry journeys they had made to Shetland in the last 12 months.

A clear majority (78%) had made only one ferry journey-that is, the one being made at the time of interview. Some 10% had made between three and five return ferry journeys. The mean number of trips for the sample was around two.

4.3.4 Trip Characteristics

Trip Purpose and Length of Stay

Figure 4.8 shows the main purpose of the trip to Shetland.



The most popular trip purpose was Short/Break Holiday (47%), followed by Employer's Business (32%). Together, these account for over three quarters of the trips made by our sample. The only other significant trip purpose is VFR (14%).

Leisure purposes dominate. They account for over two-thirds (68%) of the sample, with the balance (32%) relating to work (either Employer's Business or long-distance commuting).

The vast majority (89%) of visitors had spent at least one night on Shetland. Only 11% were on a day trip, although the figure is significantly greater (24%) among those travelling on Employer's Business.

Vehicle Accompaniment and Use of Cabins

Around half (48%) of interviewees were accompanying a vehicle on the crossing. Those most likely to do so were: either Highlands & Islands residents; and/or those travelling for business purposes. Those least likely to accompany a vehicle were aged 16-34.

Just over half (51%) of those accompanying a vehicle were travelling with a car. The main other vehicle types were:

- Van: 18%.
- Coach: 9%.
- Campervan/Motorhome: 6%.

Around one in five passengers were sailing to Orkney and, as such, did not require passenger accommodation on board.

Most (63%) of those sailing to Aberdeen were occupying a cabin, with a further 2% having some of their party in a cabin and others in reclining seats (booked).

Around one in four of those sailing to Aberdeen were in parties who were occupying a reclining seat (booked). Just 7% were in neither a cabin nor occupying booked reclining seats.

Trip Destination

Destination On Night After Sailing From Lerwick

The vast majority (81%) of visitors were sailing to Aberdeen. The balance (19%) were travelling to Orkney. Although this includes some Orkney residents, it was still the case that 15% of non-Orcadians were sailing to Kirkwall.

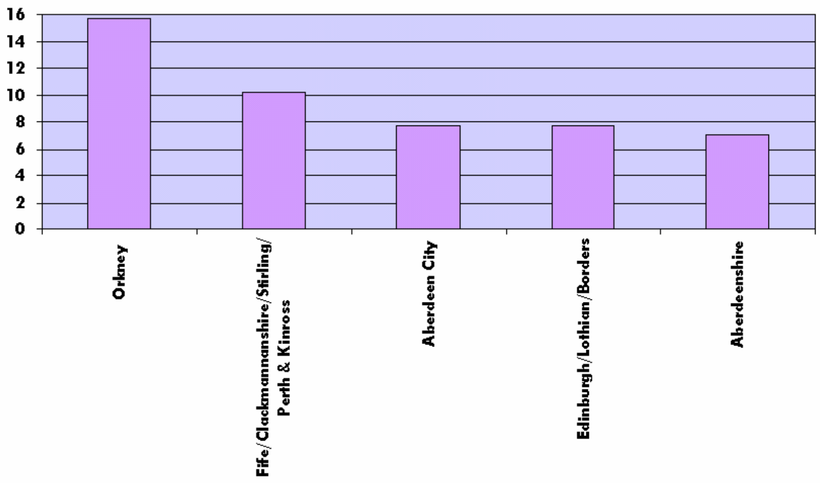
Respondents were asked where they would be staying on the night following the sailing from Lerwick. Most (66%) were staying in Scotland. This compares to 50% having a place of residence in Scotland (as stated at **4.3.2**). This indicates that some of those who live outside Scotland were staying at least one night in Scotland before travelling onwards.

Around one in three visitors (30%) were staying outwith Scotland that night.

Figure 4.9, over, shows the most common places where visitors were staying that night in Scotland. The two main destinations in Scotland were:

- Orkney: 16% of all ferry visitors.
- Fife/Clackmannanshire/Stirling/Perth & Kinross: 10%.

Figure 4.9: Ferry Visitors: Where Staying That Night In Scotland
(% of All Ferry Visitors)



This indicates that a number of respondents were visiting both Shetland and Orkney.

Slightly more (26%) were staying that night in central and southern Scotland than in the north/north east area broadly around Aberdeen (22%).

Of those who were not Scottish residents, only half (51%) were travelling back to outside Scotland on the day they arrived at either Aberdeen or Kirkwall. Of those staying that night in Scotland, the most popular destinations were:

- Orkney.
- Aberdeen City.
- Edinburgh/Lothian/Borders.

Final Destination

For a significant number (34%) of visitors where they were staying the night following the sailing from Lerwick was not their final destination. The main area to which they were travelling onwards the next day was outside Scotland.

4.3.5 Travel Onwards From Destination Ferry Terminal

Transport Mode

Interviewees were asked to identify the form of transport they would be using for their immediate travel onwards from their destination ferry terminal (either Aberdeen or Kirkwall).

Private transport was the main mode. It was used by over half the sample, through:

- Vehicle accompanied on the ferry: 46% of the whole sample.
- Own vehicle left at the ferry terminal: 10%.
- Lift: 4%.
- Hire car: 1%.

The main other modes cited were:

- Walk: 13%.
- Taxi: 11%.
- Bus/Coach: 7%.

Use of A Shuttle Bus Between Aberdeen Ferry Terminal and Aberdeen Railway Station/Bus Station

Those sailing to Aberdeen and travelling onwards by either taxi or walking were asked if they would consider using a shuttle bus to Aberdeen rail station/Aberdeen bus station to connect with onward rail/bus services. Just over half (53%) of the sample stated that they would do so. This was mainly for rail connections, as follows:

- Would use shuttle bus-for travelling on by rail: 38%.
- Would use shuttle bus-for travelling on by bus: 15%.

Around one quarter (28%) stated that they would **not** use a shuttle bus. This was due to either:

- Preferring to use a taxi or walk: 16%
- That they were not travelling onwards by either rail or bus: 12%.

The remaining 19% stated "Don't Know".

These results indicate that 15% of **all** visitors sailing to Aberdeen would consider using a shuttle bus to connect with onward rail/bus services.

4.3.6 <u>Travel to Lerwick Ferry Terminal</u>

Origin Within Shetland

More than half (56%) of the sample had begun their trip to Lerwick ferry terminal from Lerwick itself. The main other origins were:

- Islands: 11%-mostly either Unst or Yell.
- South mainland: 10%.
- North mainland: 10%.

Some 6% of visitors had origins in either Central mainland or West mainland.

Mode of Transport

Table 4.2 shows the mode of transport by which visitors arrived at Lerwick ferry terminal.

TABLE 4.2: FERRY VISITORS: MODE OF TRANSPORT TO LERWICK FERRY TERMINAL: MAIN RESPONSES	
Mode	**% of Respondents**
Vehicle being accompanied on the ferry	42%
Lift from another person	15%
Walk	13%
Hire car-driver or passenger	9%
Taxi	7%
Scheduled bus-direct to the ferry terminal	6%

Private transport was dominant. This was the choice of two thirds of visitors-mainly through the vehicle being accompanied on the ferry, but also through getting a lift or hire car. Walking and public transport had equal shares (13% of respondents), with the latter split almost evenly between taxi and scheduled bus.

4.3.7 The Trip to Shetland

Use of Modes and Ferry Terminals

The vast majority (90%) had travelled to Shetland by ferry and were thus using it for both legs of their return trip. Some 8% had flown to Shetland on the inbound leg, with the remaining 2% arriving by another mode (e.g. fishing boat).

Of those arriving by **ferry**, most (85%) sailed from Aberdeen. The balance (15%) sailed from Orkney, with 10% of non-Orcadians doing so.

Of those arriving in Shetland by **air**, the main airport used was Aberdeen (48% of those arriving by air). The main other one was Edinburgh (24%).

Transport Mode to the Airport or Ferry Terminal

Respondents were asked about the mode of transport they used for the final leg of travel to the ferry terminal or airport used for their inbound leg. Again, private transport was the most common. This was stated by over half (62%) of the sample. It mainly took the form of either: the vehicle being accompanied on the ferry (46% of the whole sample); or own vehicle left at the port/airport (10%).

Some 13% stated walk, a further 7% taxi and 6% arriving on a scheduled bus service.

Trip Origin

Interviewees were asked about the origin of their inbound journey to Shetland. Comparing these to the trip destinations for the return leg from Shetland (see **4.3.4**) shows two main differences between trip ends outside Shetland for the inbound and outbound legs.

These are:

- Visitors are more likely to stay overnight in the north/north east area broadly around Aberdeen on the night **before** travelling to Shetland than they are on the night after arriving back from Shetland. 33% do so before travelling **to** Shetland compared to only 22% doing so after arriving back **from** Shetland. The difference is most pronounced for overnights stays in Aberdeen City and for non-Scottish residents.

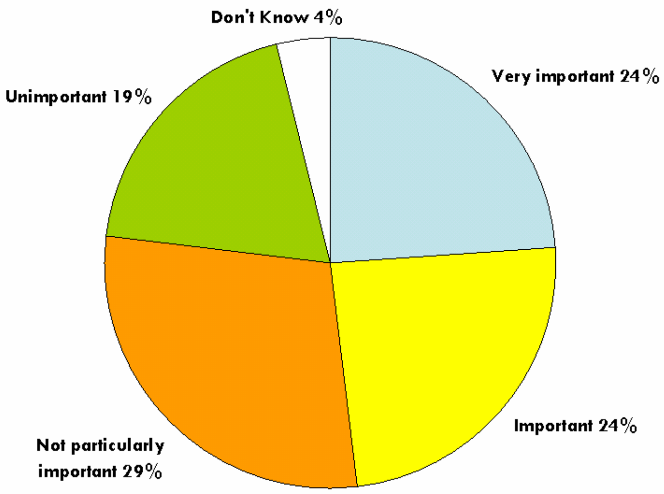
- Among those who are visiting both Shetland and Orkney, most visit Shetland first and then travel to Orkney rather than vice versa.

4.3.8 <u>Mainland Port Issues</u>

Importance of Aberdeen as the Mainland Port

Those visitors sailing to Aberdeen were asked how important it was to them that the ferry service was sailing to Aberdeen rather than another port on the Scottish mainland. The results are shown at **Figure 4.10.**

Figure 4.10: Ferry Visitors: Importance of Ferry Service Sailing to Aberdeen Rather Than to Another Scottish Mainland Port

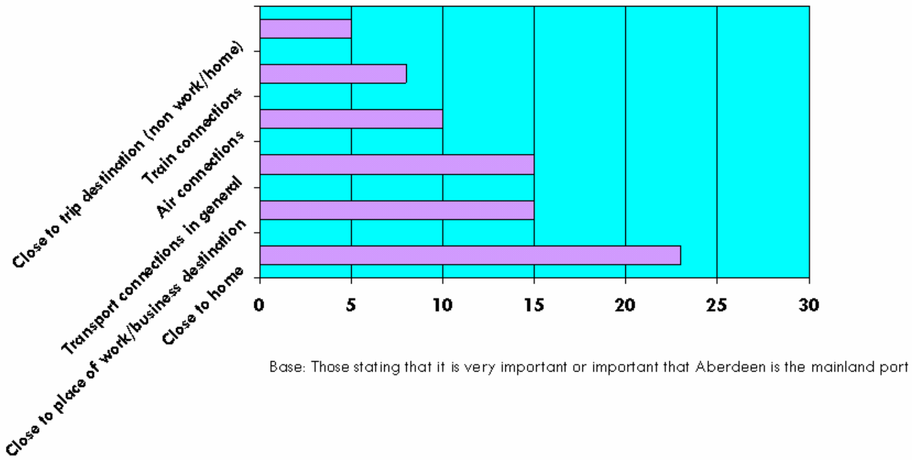


The responses are evenly divided between those who attach most importance to Aberdeen as a landfall (48%) and those to whom it is of limited or no importance (also 48%). The most common response was "not particularly important". However, at 29% it is only 5 percentage points above those who considered Aberdeen to be "very important".

Interviewees were asked for the reason underlying their response. This was done on an open-ended basis. Responses were then grouped to allow analysis.

Figure 4.11 shows the most common responses for those stating that Aberdeen is either "very important" or "important".

Figure 4.11: Ferry Visitors: Reason Why Aberdeen Is Very Important/Important (% of respondents)



The main reasons are Aberdeen's proximity to final trip destinations. This could be the interviewee's home (23%); place of work or a business location they are visiting (15%); or a trip destination that is neither their home nor work-related (5%).

However, Aberdeen is also valued by those who are travelling onwards and have a trip destination further afield. This is for the connectivity the city offers, with interviewees referring to transport connections in general (15%); and also specifically to air and train connections in broadly equal measure (10% and 8%, respectively).

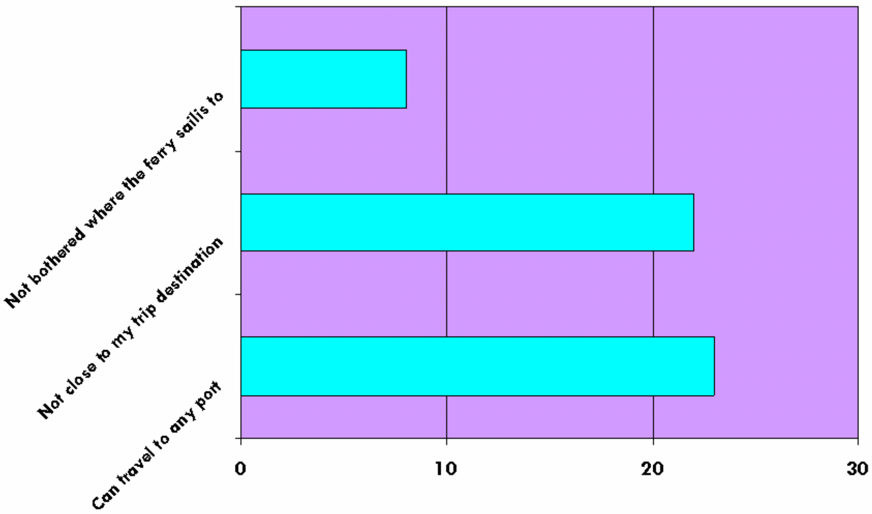
Figure 4.12, over, shows the most common reasons given by those stating that Aberdeen is either "not particularly important" or "unimportant". These are either that the interviewee was able to travel to any Scottish port or that the destination of their trip was distant from Aberdeen City.

Views on Alternative Mainland Ports

Most Suitable Port

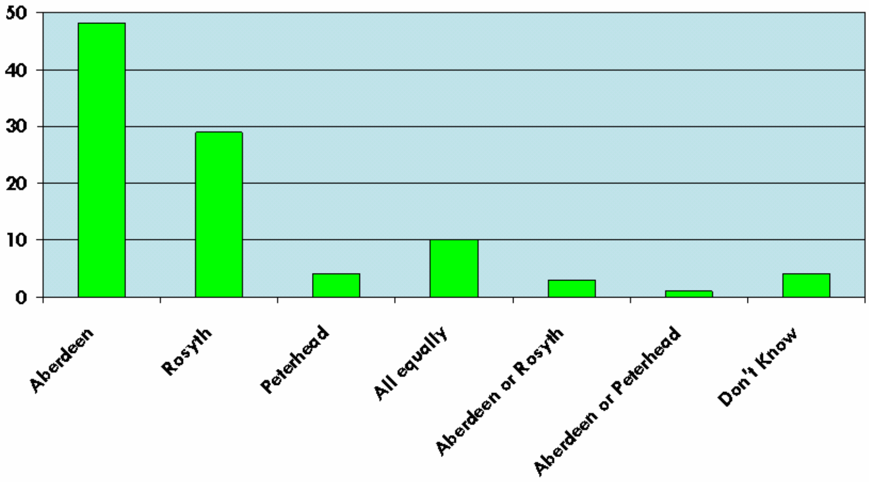
Those sailing to Aberdeen were asked to select one of the following as the most suitable port for the trip being made at the time of interview: Aberdeen; Rosyth; or Peterhead. The results are shown at **Figure 4.13**, over.

Figure 4.12: Ferry Visitors: Reason Why Aberdeen is Not Particularly Important/Unimportant (% of Respondents)



Base: Those stating that it is not particularly important, or unimportant, that Aberdeen is the mainland port

Figure 4.13: Ferry Visitors: Most Suitable Mainland Port For Today's Trip (% of Those Sailing To Aberdeen)

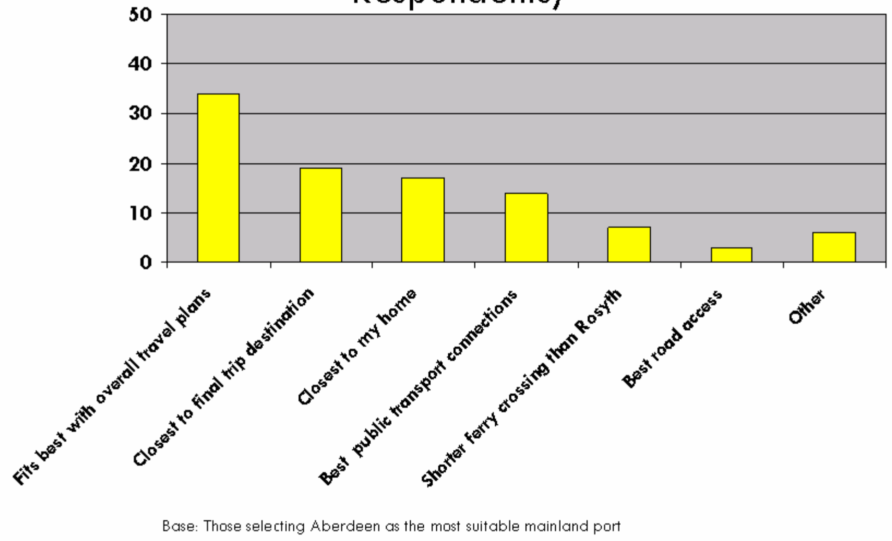


Aberdeen was the most popular choice, although at 48%, this was by less than half of the relevant respondents. Nevertheless, it was clearly ahead of Rosyth (29%). Very few (4%) respondents chose Peterhead. A small proportion (10%) stated that all three ports would have been equally suitable.

Reasons For Selection

Those selecting **Aberdeen** were asked to give reasons for their choice. **Figure 4.14** shows the results.

Figure 4.14: Ferry Visitors: Reasons for Selecting Aberdeen as the Most Suitable Mainland Port (% of Respondents)



The most common reason for selecting Aberdeen was that it gave the best fit with overall travel plans. This reason was given by just over one in three (34%) of the relevant respondents. The most common other reasons were that Aberdeen City was close to the respondent's home or to another type of trip destination. Each was cited by more than 15% of the relevant respondents.

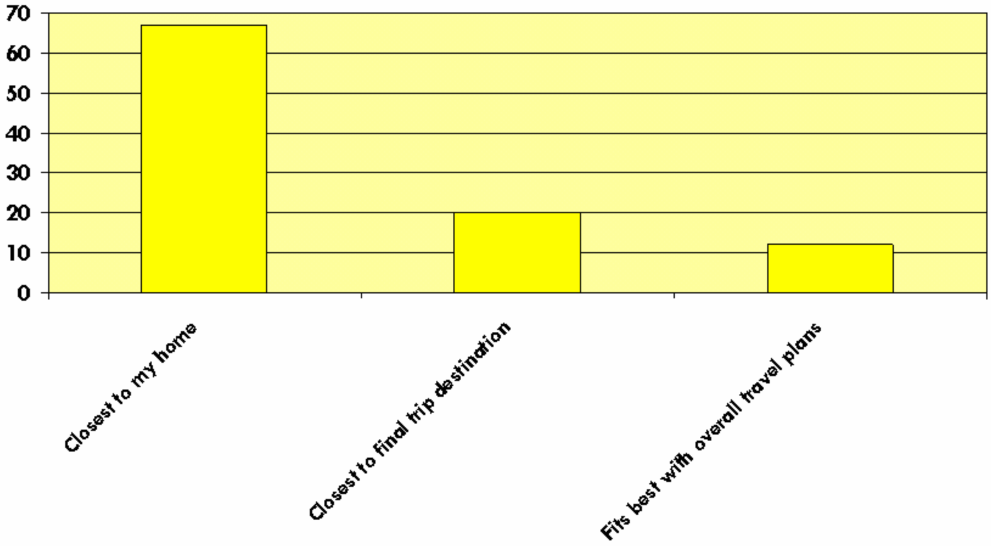
There were also references to onward transport connections. The proportion mentioning public transport (14%) was much higher than those referring to road access (3%).

The reasons were very much focused on what Aberdeen offers in terms of proximity to destinations and onward travel. Just 7% preferred Aberdeen to Rosyth because of its shorter ferry crossing.

Figure 4.15, over, shows the reasons given by those who selected **Rosyth**. The results are quite different from those for Aberdeen, in that:

- Proximity to the trip end was by far the most important factor. Two thirds (67%) of those selecting Rosyth did so because it was the closest port to their home.
- Only 12% referred to best fit with overall travel plans.
- There were no references to onward transport connections.

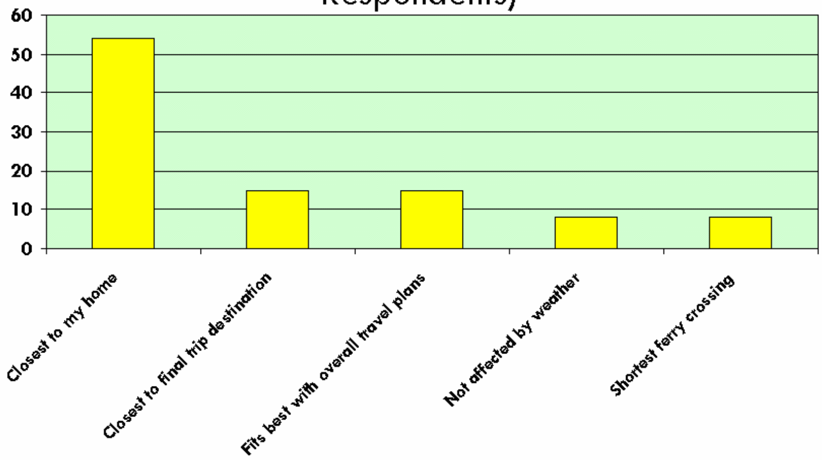
Figure 4.15: Ferry Visitors: Reasons for Selecting Rosyth as the Most Suitable Mainland Port (% of Respondents)



Base: Those selecting Rosyth as the most suitable mainland port

Finally, **Figure 4.16** shows the reasons given by those who selected **Peterhead**.

Figure 4.16: Ferry Visitors: Reasons for Selecting Peterhead as the Most Suitable Mainland Port (% of Respondents)



Base: Those selecting Peterhead as the most suitable mainland port

The results are, in some respects, similar to those for Rosyth. Over half (54%) selected Peterhead because it is closest to their home and a further 15% because it was closest to their final trip destination. Relatively few (15%) referred to best fit with overall travel plans.

Unlike Rosyth, some of those choosing Peterhead did so because of factors relating to the ferry service. These were: Peterhead's ability to better cope with weather than the other two ports; and that it would offer the shortest crossing.

However, each of these factors was mentioned by only 8%. Thus other factors were much more important in the interviewees' thinking.

4.3.9 Views on Shetland's Ferry Services

Modal Choice

Respondents were asked why they chose to depart Shetland by ferry rather than air. The two main ones were:

- Wanted/needed to travel with own vehicle: 35%.
- Ferry fares lower than air fares: 20%.

The other two most common reasons given were that: do not like flying/prefer sailing (8%); and the trip was organised and/or paid for by someone else (6%).

Rating of Features of The Ferry Service

Respondents were asked to rate various facets of the ferry service as one of the following:

- Very Good.
- Good.
- Adequate.
- Poor.
- Very Poor.

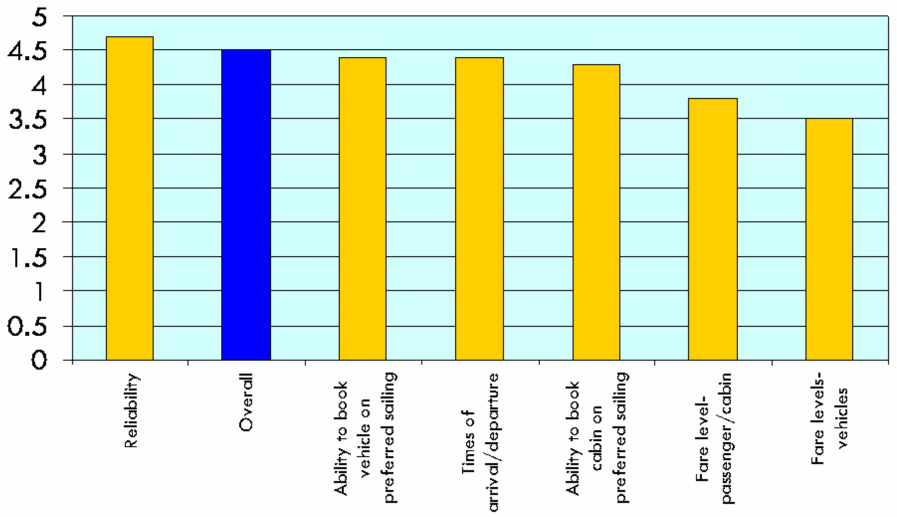
Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses to each of the categories as follows:

- Very Good-5.
- Good-4.
- Adequate-3.
- Poor-2.
- Very Poor-1.

Thus the higher the score the better the particular facet is rated.

The results are shown at **Figure 4.17**.

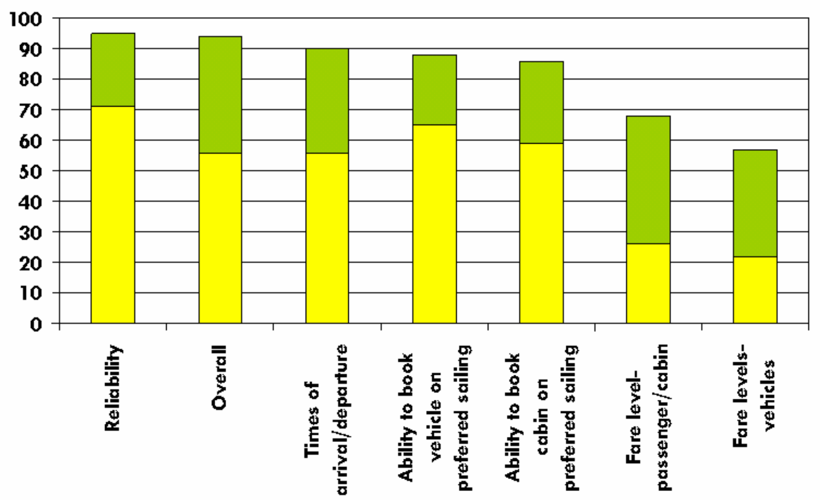
Figure 4.17: Ferry Visitors: Rating of Ferry Service



The results are quite strongly positive. All features are rated better than "adequate", while most are rated between "good" and "very good". The two lowest ratings were given to fare levels-with those for vehicles rated the lowest of the seven categories. Despite this, the overall rating for the service is 4.5: that is, half way between "good" and "very good". Only 1% considered that the overall service was "poor". None viewed it as "very poor".

Within the average scores there are variations around the mean. **Figure 4.18** shows the proportion of respondents who considered particular features of the ferry services to be either "very good" or "good".

Figure 4.18: Ferry Visitors: Rating of Features as Very Good or Good (% of respondents)



Note: Excludes "Don't Know"s

The results confirm the quite strongly positive outcomes shown earlier. Each of the features-including fares-is rated "very good" or "good" by more than half the respondents. Some 94% rate the overall service as very good/good with over half (56%) considering it to be "very good".

Future Trips to Shetland

Despite these positive perceptions, 29% of visitors stated that there were features of the ferry service that could deter them from making future visits to Shetland. A wide range of reasons was given. Reflecting the earlier findings, the main potential deterrent was fare levels. This was mentioned by 28% of relevant respondents and mostly in relation to vehicle rather than passengers/cabin fares.

Thus fare levels could act as a deterrent to 8% of **all** ferry visitors. The other most commonly mentioned potential deterrents were:

- Weather/rough crossing/seasickness: 3%.
- Length of crossing: 2%.

4.4 COMPARISON OF FINDINGS FOR AIR AND FERRY

The main differences between the results for air visitors and those for ferry visitors are that the former are **more likely** to be:

- Visiting Shetland on Employer's Business.
- Travelling to/from Aberdeen City, Glasgow/Renfrewshire/East Renfrewshire or Inverness, East Highland & Moray.
- Deterred from making repeat visits due to perceived high fare levels.

However, air visitors were **less likely** to:

- Be visiting Shetland on a Short/Break Holiday.
- Rate the services favourably.

4.5 COMPARISON OF FINDINGS FOR VISITORS AND RESIDENTS

4.5.1 Air Services

Compared to the results for residents reported at **Chapter 3**, visitors using the air services were **more likely** to:

- Use air rather than ferry because of the shorter journey time.
- Use public transport to travel to Sumburgh Airport and be more satisfied with the scheduled bus service.
- Consider using a shuttle bus between Aberdeen Airport and Dyce railway station.
- Be travelling to/from outside Scotland.

However, they were **less likely** to:

- Have a trip end in Aberdeen City.
- Give a favourable rating to fare levels.

4.5.2 Ferry Services

Compared to the results for residents reported at **Chapter 3,** visitors using the ferry services were **more likely** to:

- Be travelling to/from outside Scotland.
- Rate the ferry service favourably.
- Choose Rosyth as the most suitable mainland port-although most visitors still selected Aberdeen.

However, they were **less likely** to:

- Travel to Lerwick ferry terminal by private transport.
- Have Aberdeen City or Glasgow/Renfrewshire/East Renfrewshire as trip ends.
- State that it is "very important" that Aberdeen is the mainland port.
- Select Aberdeen as the most suitable mainland port.

5 ACTUAL AND POTENTIAL VISITORS: ONLINE SURVEY FINDINGS

5.1 INTRODUCTION

This Chapter presents the main findings of the online survey of actual and potential visitors to Shetland. The results are shown separately for these two groups.

Among those responding to the survey 39% had visited Shetland in 2006, 2007 or 2008. The remaining 61% had not, at the time of the survey, made a trip to Shetland during that period.

5.2 ACTUAL VISITORS TO SHETLAND

5.2.1 Number of Trips to Shetland in the Specified Period

More than three quarters (81%) of those who had visited Shetland had done so only once during the specified period. Most of the rest (11%) had made two trips.

5.2.2 Mode of Transport

On their most recent visit just over half (55%) travelled to Shetland by ferry. The other 45% travelled by air.

5.2.3 Views on Shetland's Air Services

Those who had used air for their most recent visit were asked to rate various facets of the services as one of the following:

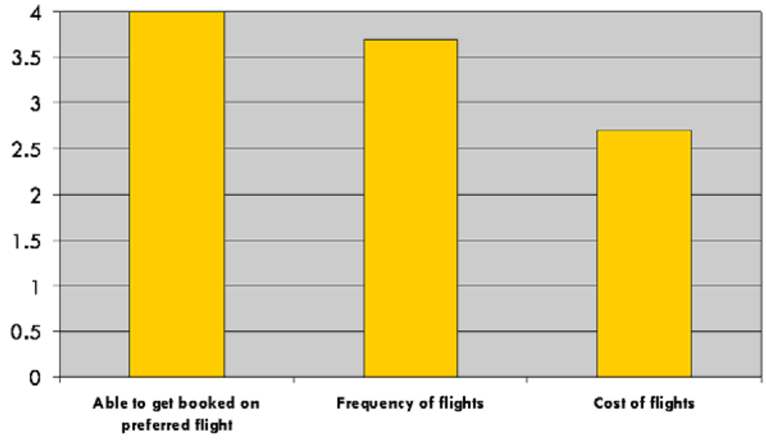
- Very Good.
- Good.
- Neither Good nor Poor.
- Poor.
- Very Poor.

Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses to each of the categories as follows:

- Very Good-5.
- Good-4.
- Neither Good nor Poor-3.
- Poor-2.
- Very Poor-1.

Thus the higher the score the better the particular facet is rated. The results are shown at **Figure 5.1**, over.

Figure 5.1: Visitors Travelling By Air: Rating of Air Services



The ability to get booked on the preferred flight receives the highest average rating. At 4.0, this equates to "good". Frequency is, at 3.7, slightly less well regarded but still approximating to "good". However, the cost of flights received a rating of less than 3.0.

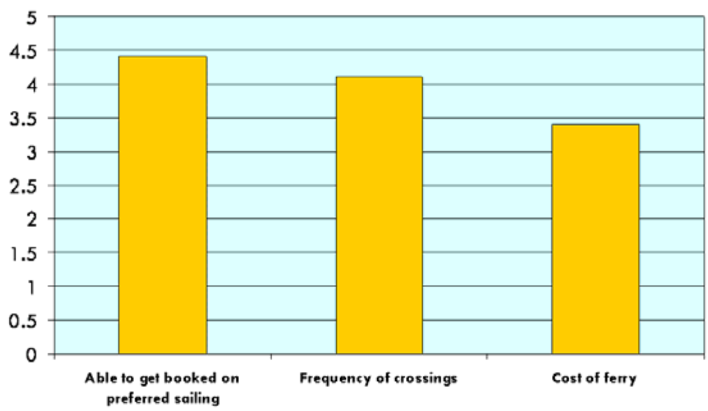
5.2.4 Views on Shetland's Ferry Services

Those who had used ferry for their most recent visit were asked to rate various facets of the ferry services as one of the following:

- Very Good.
- Good.
- Neither Good nor Poor.
- Poor.
- Very Poor.

Average weighted scores were produced on the same basis as for visitors who had used the air services (as shown at **5.2.3**). The results are shown at **Figure 5.2**.

Figure 5.2: Visitors Travelling By Ferry: Rating of Ferry Services

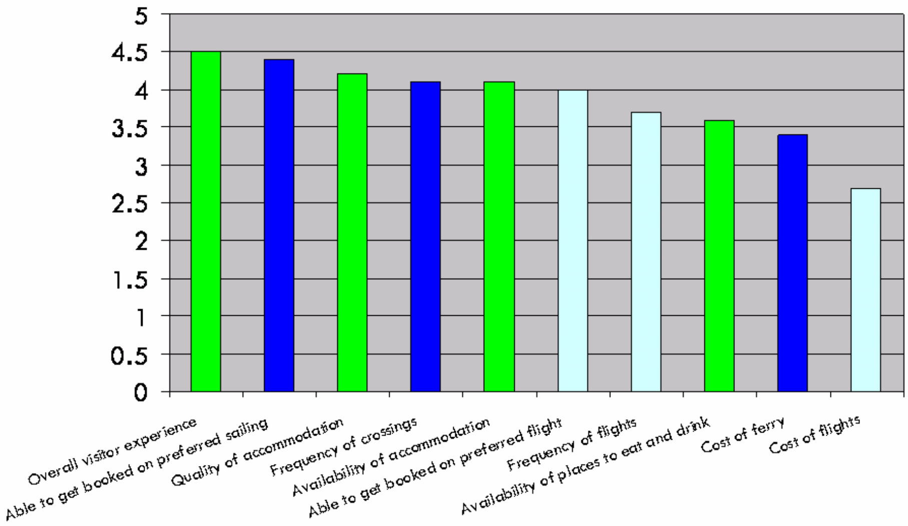


Both the ability to travel on the preferred sailing and sailing frequency are rated at above "good". Ferry costs score less well but still have a rating above 3.0.

5.2.5 Comparison of Transport to Other Factors

The survey asked respondents to rate a number of other factors. Their scores are compared to those for air and ferry services at **Figure 5.3**.

Figure 5.3: Rating of Transport Services and Other Factors



The main points to note are that:

- Of the three categories, the **non**-transport factors tend to be the best rated.
- Ability to travel on the preferred sailing and frequency of ferry service score relatively highly.
- The air services tend to score relatively poorly and lower than the ferry services.
- Fares, for both air and ferry, score the lowest of the ten factors, with air fares markedly below the scores of all others.

5.2.6 Possible Improvements to Trip To Shetland

Respondents were asked how their most recent visit to Shetland could have been improved upon. Some 16% of those who provided a response referred to at least one aspect of transport services. The main ones related to fare levels, as follows:

- Cost of air travel: 25% of those referring to external transport services.
- Cost of ferry travel: 21%.

A further 12% of those referring to external transport mentioned more frequent flights or flights from airports not currently served from Shetland.

5.3 THOSE WHO HAD NOT VISITED SHETLAND

5.3.1 Future Plans

A series of questions was put to those who, at the time of the survey, had not visited Shetland in either 2006, 2007 or 2008.

First, they were asked if they planned to visit Shetland in the next year. Over half (55%) stated "Don't Know". A further 29% stated that they **did** intend to visit Shetland. The balance of 16% **did not** intend to visit Shetland during this timescale.

5.3.2 Intention to Visit Shetland

Table 5.1 shows the range of intentions to visit Shetland at the time that information was requested from Visit Scotland.

TABLE 5.1: INTENTION TO VISIT SHETLAND AT THE TIME THAT INFORMATION WAS REQUESTED FROM VISIT SCOTLAND

Intention	% of Respondents
I was definitely planning to go but hadn't booked yet	9%
I was thinking of visiting Shetland and wanted more information	57%
I was just looking at destinations to get an idea of places to go	25%
I had no immediate plans to visit Shetland	8%
Don't Know/Can't Remember	1%
TOTAL	**100%**

Base: Those who had not visited Shetland in 2006, 2007 and 2008

More than half were thinking of visiting Shetland at that time. Overall, the results show that two thirds had either decided to visit Shetland or were thinking of doing so. A further one in four were weighing up Shetland against other possible destinations.

5.3.3 Why No Visit Was Made to Shetland

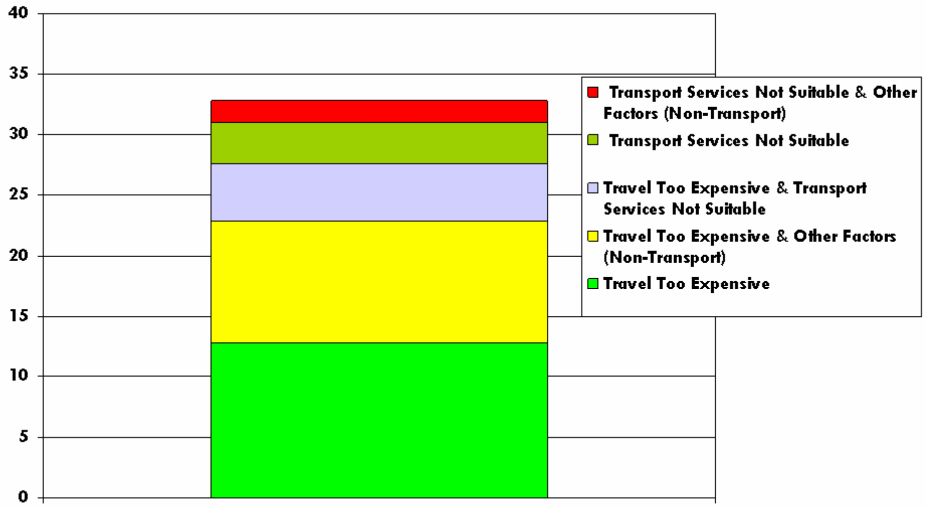
Respondents were asked why they had not visited Shetland since receiving the VisitScotland information. In total, 33% of respondents stated that they had not visited wholly or partly due to transport-related factors. Of these individuals:

- 18% did not visit Shetland **solely** because of transport-related factors; and
- A further 15% were **partly** influenced by these factors.

Figure 5.4, over, shows the various components of the transport-related responses. The main points to note are that:

- Cost is a greater deterrent to visiting Shetland than any other aspect of transport services.
- 13% of those who did not visit Shetland made that decision solely because of travel costs.
- The decision of a further 10% was partly influenced by travel costs, along with other, non-transport related factors (e.g. accommodation is too expensive).

Figure 5.4: Transport Factors and the Decision not to Visit Shetland
(% of Those Who Have Not Visited Shetland)



5.3.4 Those Not Visiting Solely Due to Transport-Related Factors

Introduction

The following analysis relates to those who had not visited Shetland due only to transport-related factors. These comprise people who did not visit Shetland:

- Solely because of travel cost.
- Solely because of transport services not being suitable.
- Due to both of the above factors.

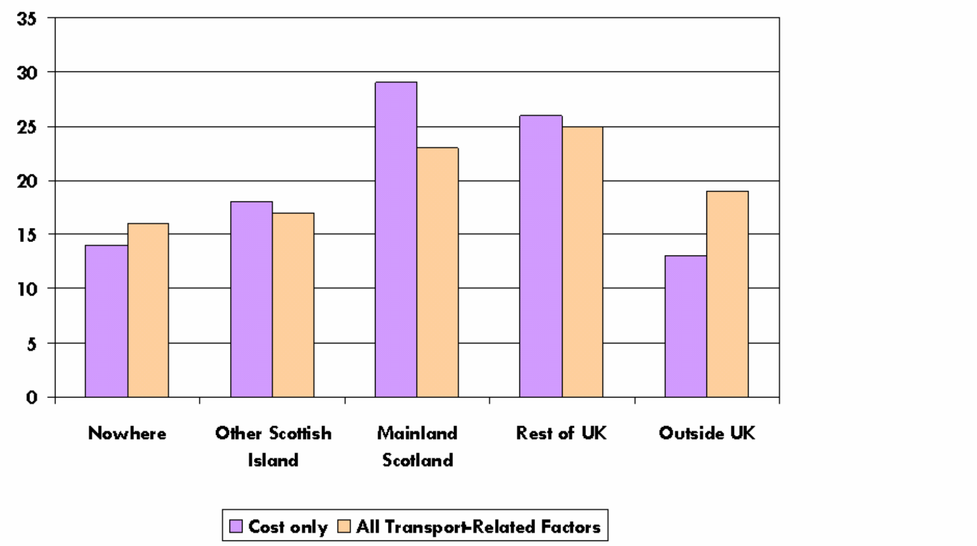
Places Visited Instead of Shetland

Figure 5.5, over, shows where the relevant respondents visited instead of Shetland.

For **all** transport-related factors, a total of 40% made a visit to somewhere else in Scotland, while 44% made a visit to a destination outside Scotland. Around one in six stated that they did not make trip to another destination instead of Shetland. Within Scotland, respondents were more likely to have visited the Scottish mainland rather than a Scottish island.

The results are broadly similar for those not visiting Shetland **solely due to cost**. However, these individuals were more likely to have visited the Scottish mainland and less likely to have made a trip to a non-UK destination.

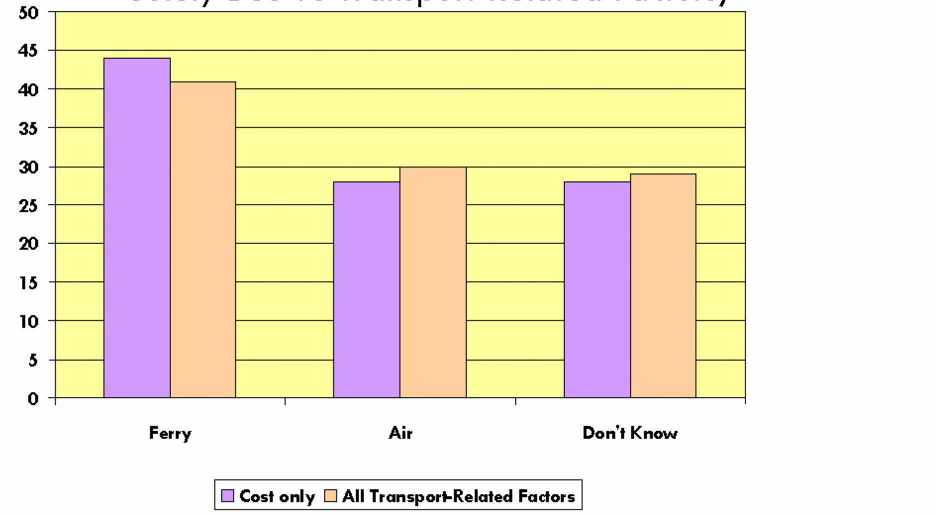
Figure 5.5: Where Did You Visit Instead of Shetland? (% of Those Not Visiting Solely Due To Transport-Related Factors)



About The Visit That Would Have Been Made To Shetland

Figure 5.6 shows the transport mode that would have been used if a visit had been made to Shetland.

Figure 5.6: If You Had Visited Shetland Would You Have Travelled by Ferry or Air? (% of Those Not Visiting Solely Due To Transport-Related Factors)



Allowing for the significant proportion of "Don't Know"s, those who would have travelled by ferry were more likely to be have been deterred than those who would have flown. This is the case for all transport-related factors and cost. This could imply that potential ferry users are more price sensitive than potential flyers.

Around 90% of those deterred from visiting Shetland would have made a trip for Holiday purposes. For the trip that would have been made the average (median) party size was two people.

Most of those deterred by transport factors would have visited Shetland during the main holiday periods, as follows:

- July/August: 43%.
- May/June: 32%.
- September/October: 21%.

Those deterred **solely by cost** were slightly more likely to have visited during the peak period of July/August.

5.3.5 Transport Service Characteristics

Issues With Ferry and Air Services

All of those who had not visited Shetland were asked if there was anything about the air or ferry services that contributed to their decision. **One in four stated that this was the case**. Among these respondents the issues related to:

- Both the ferry and air services: 40%.
- Solely the ferry services: 32%.
- Solely the air services: 28%.

Thus the air services and ferry services were of equal significance in deterring visits to Shetland.

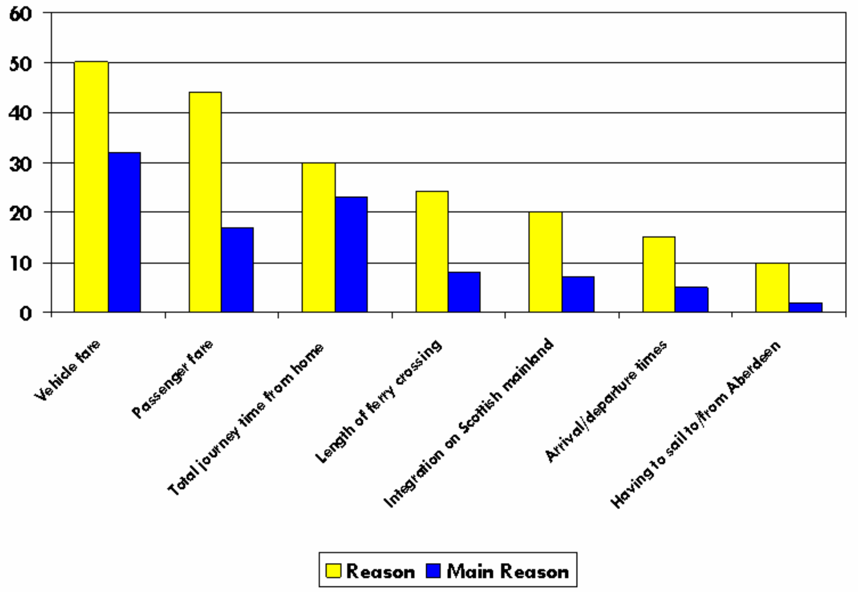
Ferry Services

Respondents were asked what features of the ferry services contributed to the decision not to visit Shetland. The responses are summarised at **Figure 5.7**, over.

Among **all** the reasons given, vehicle and passenger fares were the most common. Each was mentioned by more than 40% of respondents. Total journey time, the length of crossing and integration with other transport services on the Scottish mainland were also significant. Each was mentioned by at least one in five respondents. The results also show that the use of Aberdeen as the mainland port does not appear to be a significant deterrent to visiting Shetland.

For the **main** reasons given, vehicle fare was the most common response. It was given by 32% of respondents. Total journey time (23%) was the second most popular main reason, and cited by more interviewees than passenger fares (17%).

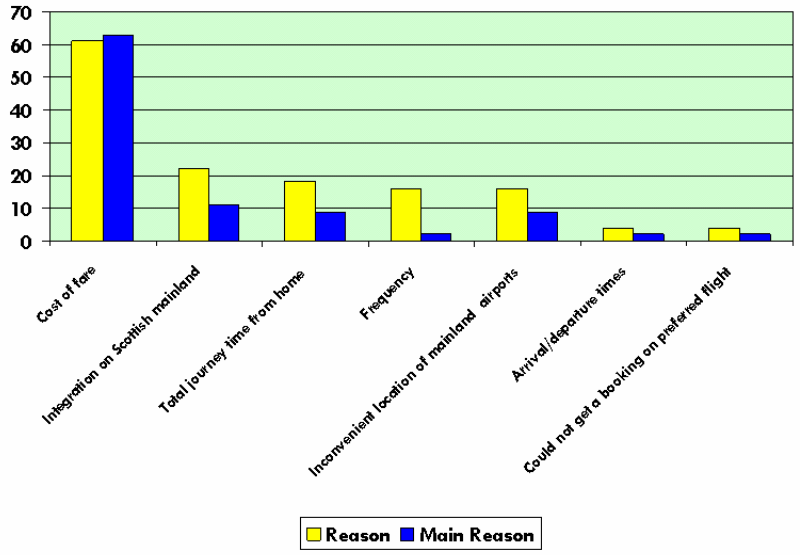
Figure 5.7: Which Features of the Ferry Services Contributed to Your Decision Not to Travel to Shetland? (% of Respondents)



Air Services

The same analysis was undertaken for the air services. The results are shown at **Figure 5.8.**

Figure 5.8: Which Features of the Air Services Contributed to Your Decision Not to Travel to Shetland? (% of Respondents)



Among **all** the reasons given, fares was very clearly the most common response. It was mentioned by over 60% of respondents, with only one other factor-connections between air services and other transport on the UK mainland-mentioned by more than 20%.

The same picture emerges for the **main** reason given. Fares was mentioned by 63% of respondents, with the next most popular reason being, again, integration (11%).

5.4 THOSE WHO PLANNED TO VISIT SHETLAND IN THE NEXT YEAR

5.4.1 Intentions To Visit Shetland

Those who stated that they planned to visit Shetland in the next year were asked to describe their current intentions. The results are reported at **Table 5.2**.

TABLE 5.2: INTENTION TO VISIT SHETLAND IN NEXT YEAR

Intention	% of Respondents
I am definitely going and have booked travel and accommodation	16%
I am definitely going and have booked travel but not accommodation	2%
I am definitely going and have booked accommodation but not travel	2%
I am definitely going but have not booked yet	45%
I am just considering different destinations to get an idea of places to go	35%
TOTAL	**100%**

Base: Those who had not visited Shetland in 2006, 2007 and 2008 but planned to do so in the next year

It shows that at the time of the online survey:

- In total 65% stated that they were definitely going to visit Shetland. The other 35% stated that they planned to visit but, as **Table 5.2** shows, these plans were not definite.
- 20% of the respondents had made bookings for at least part of their visit, with most having booked both travel and accommodation.
- The largest proportion (45%) stated that they were definitely going to visit but, at that time, had made no bookings.

Respondents were asked about the mode of transport they expected to use to travel to Shetland. Most (46%) stated that they would be using the ferry, with 26% stating air. The rest (28%) had not decided at the time of the survey.

5.4.2 Ferry Services

Those who stated that they intended to travel by ferry were asked about the importance of a number of elements of the services when deciding whether or not to visit Shetland.

Respondents were asked to choose between:

- Very important.
- Quite important.
- Neither important/nor unimportant.
- Not important.
- Not at all important.

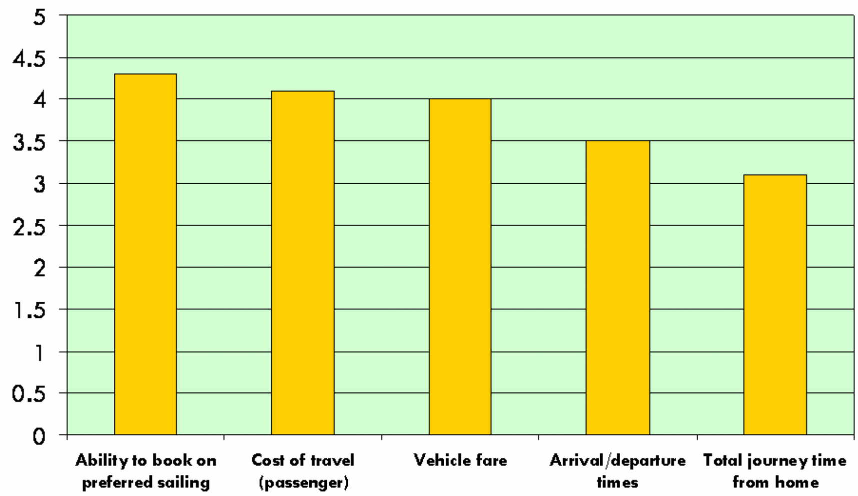
Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses to each of the elements as follows:

- Very important-5.
- Quite important-4.
- Neither important/nor unimportant-3.
- Not important-2.
- Not at all important-1.

Thus the higher the score the more important the particular element is considered when deciding whether to visit Shetland.

The results are graphed at **Figure 5.9**.

Figure 5.9: Importance of Elements of Ferry Services in Decision Whether or Not to Visit Shetland



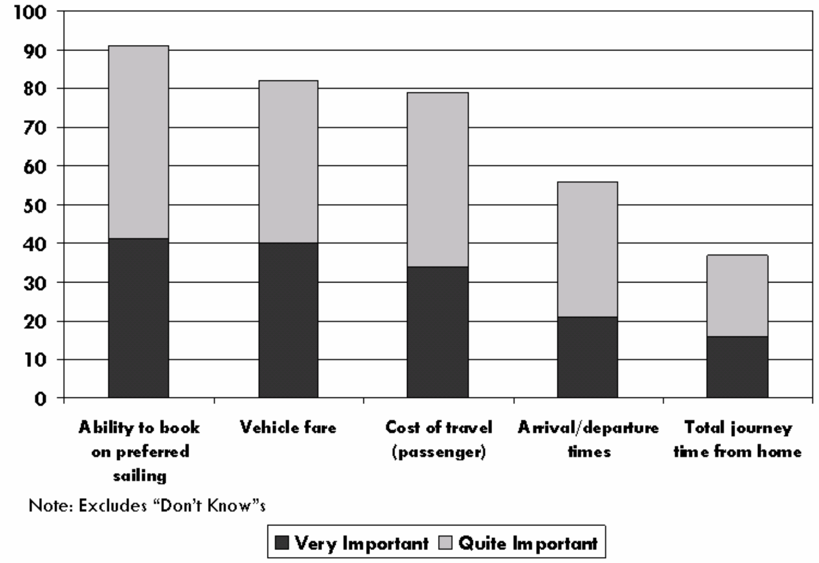
It shows that the ability to get a booking on the preferred sailing is the most important element. Its score lies between "quite important" and "very important".

Fares are considered the other most important element. The scores for passenger and vehicle fares are very similar, accepting that vehicle fares will not be important to those wishing to travel as foot passengers.

Sailing times and total journey time are considered the least important. However, their scores indicate some influence in the decision-making process.

Within the average scores there are variations around the mean. **Figure 5.10** shows the proportion of respondents who considered particular elements of the ferry services to be either "very important" or "quite important".

Figure 5.10: Elements Considered to be Very Important or Quite Important in Decision Whether or Not to Visit Shetland (% of Respondents)



Note: Excludes "Don't Know"s

It shows that all the elements-bar total journey time-are considered at least "quite important" by more than 50% of the respondents. The figures for booking on preferred sailing and vehicle fare are above 80%, with 40% of respondents considering each of these two elements to be "very important".

5.4.3 Air Services

The same type of questions were put to those who stated that they intended to travel to Shetland by air. The results are reported below on the same basis as those at **5.4.2**.

Weighted average scores for the four elements are shown at **Figure 5.11**, over. Fares and the ability to travel on the preferred flight were seen as the two most important elements. The scores for both lie between "very important" and "quite important". The other two elements are less significant in relative terms. However, their scores show that they are still considered to be close to "quite important".

Figure 5.12, over, shows the proportion of respondents who considered particular elements of the air services to be either "very important" or "quite important".

Fares and the ability to travel on the preferred flight are considered to be "very" or "quite" important by around 90% of respondents. The figures for the other two elements are each above 60%. They are significant in themselves, even if they are less important than fares and the preferred flight. Three of the four elements (the exception being flight arrival and departure times) are considered to be "very important" by more than 30% of respondents.

Figure 5.11: Importance of Elements of Air Services in Decision Whether or Not to Visit Shetland

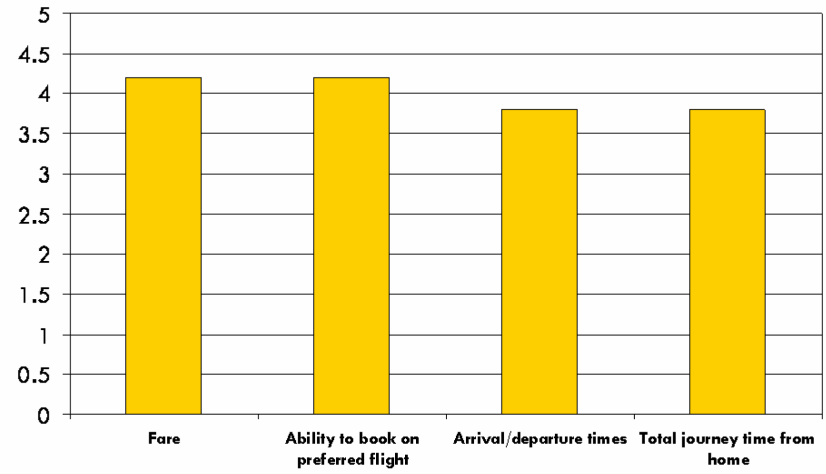
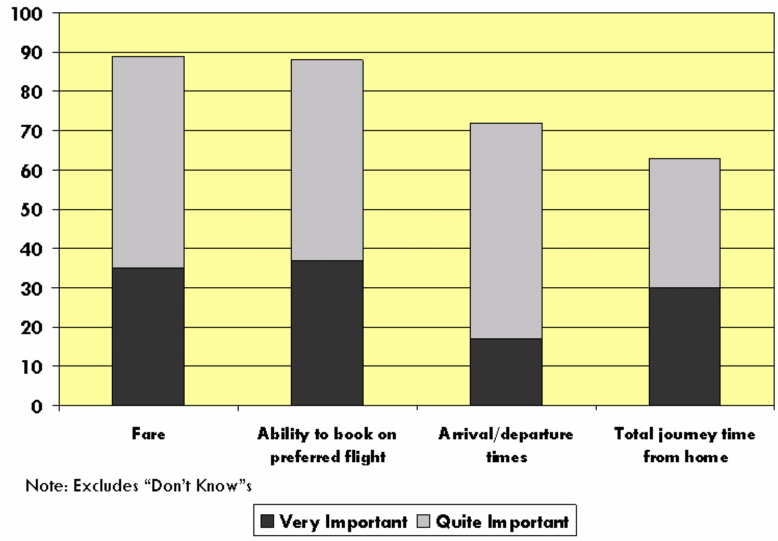


Figure 5.12: Elements Considered to be Very Important or Quite Important in Decision Whether or Not to Visit Shetland (% of Respondents)



Note: Excludes "Don't Know"s

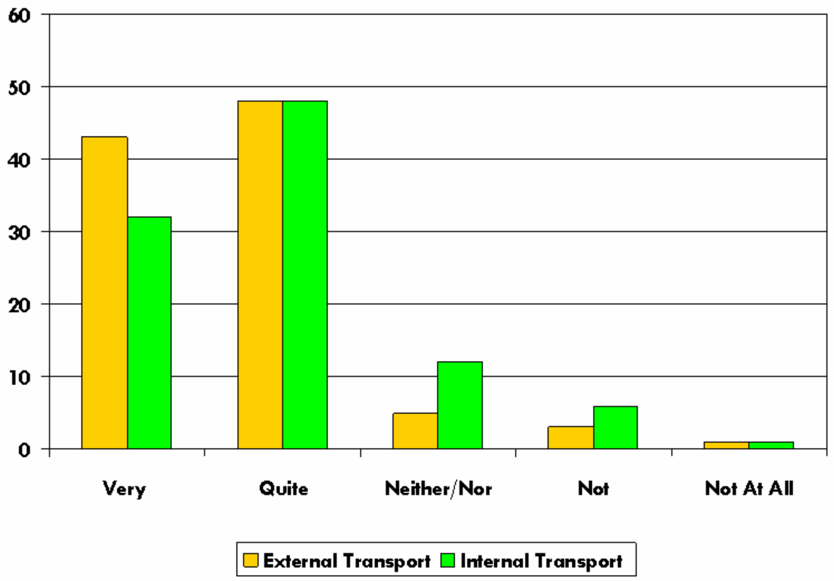
5.5 EASE OF ACCESSING INFORMATION ON TRAVEL AND TRANSPORT SERVICES

Finally, all of those taking part in the online survey were asked about how straightforward they had found accessing information on travel and transport services. This was asked in relation to both external transport and to internal transport in Shetland.

The responses, excluding those who had not tried to access the relevant information, are shown at **Figure 5.13**, over.

The results for external transport services are clearly positive. Over 90% had found accessing the information either "very" or "quite" straightforward, with over 40% reporting the former.

Figure 5.13: How Straightforward Have You Found Accessing Information on Travel and Transport? (% of Respondents)



The findings for internal transport are also positive. 80% reported that the process had been either "very" or "quite" straightforward.

5.6 COMPARISON TO FACE-TO-FACE VISITOR SURVEY FINDINGS

The results are closely consistent with those for the face-to-face visitor surveys reported at **Chapter 4**. In particular:

- The ratings for the air and ferry services are very similar in the two sets of surveys. In both cases, the ferry services are rated consistently higher than air.
- More generally, both surveys highlight cost as being a key consideration and a deterrent to trip-making to Shetland-especially in the case of air.

However, the online survey has placed the findings in a broader context by indicating that:

- Transport and, in particular, fare levels, is an important factor in actually deterring some visits to Shetland.
- While fares have a strong influence on decision-making about visiting Shetland, so does capacity in terms of being able to travel on preferred sailings and flights.
- Transport services are rated less favourably than other aspects of Shetland's overall visitor product.
- Shetland is competing more against the mainland UK than against other Scottish islands to attract visitors whose decisions are influenced by transport services.

6 BUSINESSES, FREIGHT & LIVESTOCK

6.1 INTRODUCTION

This Chapter reports the research findings for:

- The movement of freight by sea.
- Business travel by Shetland companies.
- The transport of livestock.
- Air freight.

It draws on the results from the business survey and our wider consultations.

6.2 BUSINESS SURVEY SAMPLE

6.2.1 Location

At total of 30 businesses were interviewed. Of these, 23 (77%) were based or mainly based in Lerwick. The remainder were based elsewhere in Shetland.

6.2.2 Business Activities

Businesses were asked to describe their main business activity or activities. The 30 companies were involved in a total of 38 activities. Twenty two were involved in one main activity, with the other eight involved in two main activities. The results are shown at **Table 6.1**.

TABLE 6.1: SURVEY SAMPLE: MAIN BUSINESS ACTIVITIES

Business Activity	Number of Companies
Engineering (including Civil Engineering)	8
Manufacturing	8
Financial & Business Services	5
Retail	5
Wholesale	4
Aquaculture	2
Garage/Car Dealership	2
Logistics & Distribution	2
Other	2

It shows that the most common activities were Engineering and Manufacturing. The other most common other ones were Financial & Business Services and Retail.

6.2.3 Business Size

In Shetland terms, the sample were quite large employers. Twenty-nine of the 30 companies surveyed provided employment data. In these companies Full-Time Equivalent (FTE) employment totalled over 1,000. Average (median) employment was 16 FTE.

Over three quarters (76%) of the companies employed more than 10 FTE, while around one in four (24%) have over 50 FTE employees.

6.2.4 Geographic Distribution of Sales

The companies varied in terms of the importance of sales outside Shetland, as follows:

- 13% (four companies) made all their sales outside the islands.
- 43% made all of their sales within Shetland.
- 44% made sales both within and outwith Shetland.

Thus more than half of the companies made at least some sales outside Shetland, accepting that in some cases they were relatively limited.

As a simple average (mean) across the sample, 74% of sales were made within Shetland and 26% were exports outside the islands. This split changes only very slightly if the sales are weighted by company employment.

6.3 SEABORNE FREIGHT

6.3.1 Introduction

This section reports the findings on freight movements. For ease of understanding the results are reported separately for imports to Shetland and exports from Shetland. In each case the analysis covers:

- Organisation of transport to/from Shetland.
- Shipping services used.
- Hauliers used.
- Frequency of movements.
- Freight volumes.
- Freight origins and destinations outside Shetland.

The relatively large size of the companies in our sample means that they each import a wide range of products from an equally wide range of suppliers. Therefore the survey questionnaire collected information **only for the most significant imports and exports,** in terms of volume and frequency of movements.

6.3.2 Imports

Data

In total, 27 of the 30 companies provided information on their imports into Shetland. Two of the companies (both in Financial & Business Services) did not provide information this because they import very little into the islands.

Organisation of Transport To Shetland

For around **60%** of the companies, the goods were delivered into Shetland, without being transhipped through a haulage depot in Aberdeen. This was particularly the case for retail and wholesale goods and for low value commodities (e.g. animal feed) brought to Shetland using a bulk cargo vessel.

In most cases the transport was organised and paid for by the supplier of the goods. In very few cases (three companies) were the goods brought into Shetland by the company's own vehicles and/or staff.

For the remaining **40%** of companies, the supplier organises and pays for the transport of the goods as far as Aberdeen where they are delivered into the depot of the haulier that is responsible for transporting them on the final leg of their journey to Shetland. The Shetland company is responsible for the organisation and payment of transport between Aberdeen and the islands.

In some cases this reflects that the supplier is unwilling to organise transport beyond Aberdeen. However, in other cases the Shetland company is content to organise the final leg from Aberdeen to Shetland. This was because control over the transport, rather than it being left to the supplier was felt to result in:

- Lower charges for transport from Aberdeen to Shetland.
- Quicker delivery.
- Ability to deal with delays more effectively than if this was left to the supplier.

Suppliers delivering only to Aberdeen was quite common for engineering companies and/or where goods were quite bulky and not especially time sensitive.

Shipping Services Used

Our sample of companies have their goods brought to Shetland by up to three different types of shipping service. These are:

- Ro-ro (roll-on roll-off)-Northlink passenger and freight vessels.
- Lo-Lo (lift-on lift-off)-the container service operated by Shetland Line.
- Bulk vessels. These are used for large shipments of either liquids (e.g. fuel oil) or dry goods (e.g. agricultural inputs).

In terms of the types of shipping service used, the results were:

- Northlink only: 48% of companies.
- Northlink and Shetland Line: 36%.
- Northlink, Shetland Line and bulk vessels: 8%.
- Northlink and bulk vessels: 4%.
- Shetland Line only: 4%.

Thus:

- There is a broadly even split between companies whose imports arrive by just one form of shipping (e.g. ro-ro only) and those where more than one form is used.
- Almost all the companies have at least some of their imports arriving by ro-ro.
- Around half have at least some imports arriving on the lo-lo service.
- Three of the companies have imports arriving by bulk vessel.

In some cases the same commodity may arrive on occasion by ro-ro and on others by lo-lo. The choice depends on cost and the urgency of the requirement. Overall, the choice of particular shipping modes reflects the cost of sea freight relative to the value of the goods and their time sensitivity. In general, the lower the value of the goods and the less time sensitive they are, the less likely they are to use the ro-ro services.

Finally, those whose goods arrived on ro-ro services generally did not know if they had used the NorthLink passenger or freight services. In most cases, the choice between the two services was left to the supplier and/or the haulier.

Hauliers Used

Most imports are delivered by the four main hauliers that serve Shetland. These are:

- JBT.
- Northwards.
- Shetland Transport.
- Streamline.

As noted earlier, companies import very little via their own vehicles. Some use is made of hauliers without a presence on Shetland. However, this is generally limited to a small number of cases where the mainland supplier has a national agreement with a non-Shetland haulage company.

For most companies, imports to their premises are made by more than one haulier and, in a number of cases, as many as three different contractors. Use of different hauliers reflects a combination of:

- Price and availability of a haulier for moving a specific load.
- To a lesser extent, a conscious decision to spread business across more than one contractor to encourage general competition and to avoid over-reliance on one provider.

Some companies mentioned price and quality issues they have/had have with specific hauliers. However, there is a quite high degree of satisfaction with the number of hauliers operating in the market and the range and quality of services they provide. These comments apply to both the import and export of goods.

Frequency of Deliveries

Table 6.2 reports the frequency of delivery of the most significant imports.

TABLE 6.2: FREQUENCY OF DELIVERY OF SIGNIFICANT IMPORTS	
Frequency	**% of Significant Imports**
More Than Weekly	42%
Weekly	29%
Every 2-3 Weeks	10%
Monthly	8%
Less Than Monthly	10%
TOTAL	**100%**

It shows that most goods arrive quite frequently. Around 70% of the imports are delivered at least weekly, with over 40% arriving more often than this.

Volumes

Respondents were asked to describe the volumes associated with their most significant imports. There were difficulties in putting these on a common base, given that some goods were arriving in trailers and containers and others by bulk vessels. Where goods were being delivered by trailer there were also some difficulties in expressing these on a common basis where there was a less than full trailer load.

The overall results show that the sample is evenly split between those whose imports average less than one full trailer load equivalent per week, and those whose imports exceed this amount. A number of companies receive daily deliveries but these may be only a small number of boxes and cartons. At the other end of the scale some companies are receiving a number of full trailer loads per day. It should be appreciated that actual **total** volumes will greater as the company survey collected information for only the most significant imports.

Two companies receive, per week, the equivalent of more than ten full trailer loads. The largest volumes tend to be among those involved in retailing and/or wholesaling.

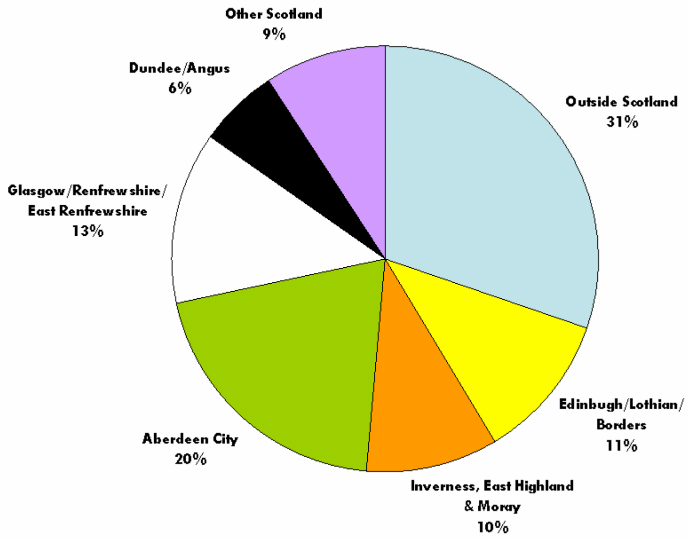
Import Origins

The origins of goods have been analysed on two bases:

- Unweighted: that is, the geographic origins of each of the relevant commodities.
- Weighted, with the origins based on the volumes, in terms of full trailer load equivalents.

Figure 6.1, over, reports the unweighted results.

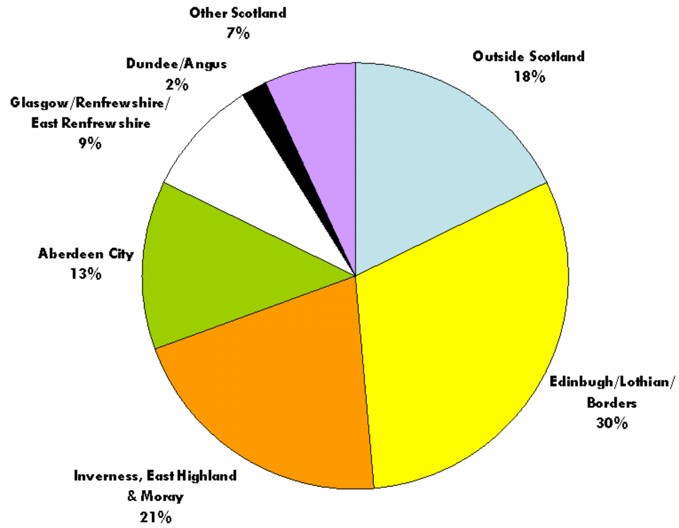
Figure 6.1: Businesses: Origin of Freight Imports-Unweighted



It shows that around 30% of the origins are outside Scotland. These are predominantly within England. The main origins within Scotland are Aberdeen City and Glasgow/Renfrewshire/East Renfrewshire. The former was an important source of goods for those in the engineering sector. Glasgow/Renfrewshire/East Renfrewshire was also important to this sector for the sourcing of metals, as was Dundee/Angus.

Figure 6.2 presents the results weighted by volume.

Figure 6.2: Businesses: Origin of Freight Imports-Weighted By Volume



Weighting the results significantly increases the shares of Edinburgh/Lothian/Borders and Inverness, East Highland & Moray. Collectively these account for around half of the origin of freight traffic among our sample. Our consultations for the study suggest that the 13% shown for Aberdeen City may be an understatement for the market as a whole. However, it is clear that the Scottish central belt is a key source of imported goods.

The data also show that while sourcing freight from outside Scotland is quite common among our sample, the volumes are quite low compared to those from certain parts of Scotland.

The findings should be viewed in context. Notably, the weighted results are:

- Strongly influenced by the volumes of a small number of companies.
- Based on a sample of Shetland companies.

6.3.3 Exports

Data

In total, 14 of the 30 companies provided information on exports from Shetland. The goods exported included: fish and shellfish; knitwear; metal products; and a range of manufactured goods.

Organisation of Transport From Shetland

In all cases transport from the islands was organised and paid for by the Shetland company.

Shipping Services Used

In terms of the types of shipping service used, the results were:

- Northlink only: 71% of companies.
- Northlink and Shetland Line: 7%.
- Northlink and bulk vessels: 7%.
- Bulk vessels only: 7%
- Shetland Line only: 7%.

Thus:

- Over two-thirds of the companies export using only ro-ro. Almost all (85%) make some use of the Northlink service.
- 14% of companies make use of either Shetland Line or bulk vessels.

Hauliers Used

Where hauliers were used for exports from Shetland, they were concentrated in the four main contractors referred to earlier. Some use was made of Parcelforce for low weight, high value goods.

Frequency of Exports

Table 6.3, over, shows the frequency of companies' significant exports from Shetland. Please note that not all companies were able to provide information on this aspect.

TABLE 6.3: FREQUENCY OF SIGNIFICANT EXPORTS	
Frequency	**% of Significant Exports**
More Than Weekly	29%
Weekly	14%
Every 2-3 Weeks	7%
Monthly	0%
Less Than Monthly	50%
TOTAL	**100%**

The Table shows activity at two ends of the spectrum. Half of the export commodities leave Shetland on a less than monthly basis. These include products that are moved by bulk vessel when sufficient quantities have been generated to meet the costs of chartering a large vessel. In contrast, over 40% of the exports leave the island at least weekly-and in some cases daily.

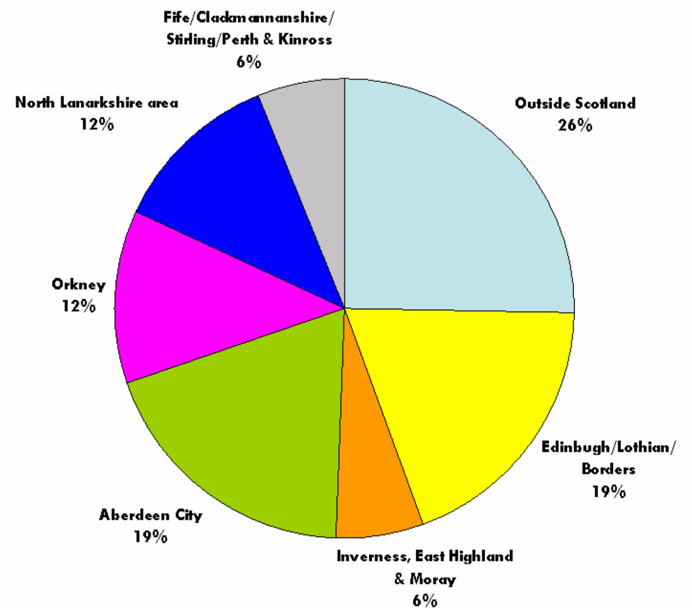
Volumes

Export volumes varied considerably between companies. At the high end, some companies are exporting more than the equivalent of a full loaded trailer per day. At the lowest end, some exports may be a small number of pallets on a less than weekly basis. As noted earlier, exports via bulk vessel are high volume per shipment but are relatively infrequent.

Export Destinations

The destinations of exports have been analysed on the same basis as the origins of imports shown earlier. **Figure 6.3** shows the unweighted results.

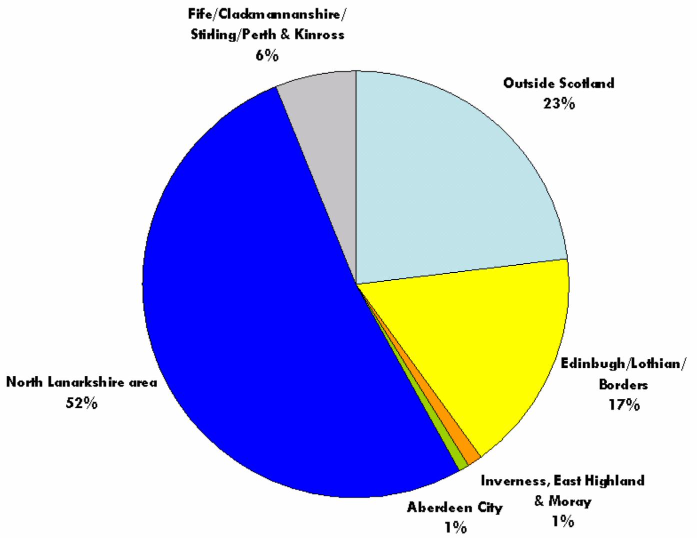
Figure 6.3: Businesses: Destinations of Freight Exports-Unweighted



Around one quarter of export destinations are outside Scotland. The most common ones in Scotland are in Aberdeen City and Edinburgh/Lothian/Borders. It should be noted that the "North Lanarkshire area" is a transhipment point for aquaculture products rather than the final destination for these products (which is outside Scotland).

Figure 6.4 presents the results weighted by volume.

Figure 6.4: Businesses: Destinations of Freight Exports-Weighted By Volume



The findings need to be interpreted with caution. This is because not all of the companies that identified export destinations were able to provide usable data on volumes.

However, this tended to be where volumes appeared to be low-for example, for exports to Orkney. The relatively limited amount of freight between Shetland and Orkney was confirmed by our wider consultations for the study. Overall, we believe that the results provide a reasonable assessment for our sample, although, again, there may be an understatement in the case of Aberdeen City based on information from our wider consultations.

The volumes of aquaculture product mean that the North Lanarkshire area accounts for more than half of the weighted exports. Our consultations suggest that this is typical of the general distribution patterns associated with aquaculture exports from Shetland, although we understand that some wet fish is exported for processing in Aberdeenshire.

Edinburgh/Lothian/Borders also remains a significant destination for exports.

Comparison to Freight Imports

Comparing the profile of export activity to that of imports shows that for the former:

- Volumes are considerably below those of imports.
- Companies are much more likely to be paying for and organising transport.
- Companies are more likely to use only the ro-ro services.
- In most cases, exports are moved less frequently than imports, although a number of exporters send goods off Shetland on a daily basis.
- Exports via Aberdeen tend to travel onwards without being transhipped through hauliers' depots in the city.
- For the weighted results, export trip ends in the North Lanarkshire area are much more significant. In contrast, Aberdeen City, Edinburgh/Lothian/Borders and Inverness, East Highland & Moray are much less important for exports than they are for imports.

6.4 SATISFACTION WITH FREIGHT SHIPPING SERVICES

Companies were asked to rate a number of aspects of external freight shipping services (covering ro-ro, lo-lo and bulk coastal vessels) in terms of meeting their business requirements. This was on the basis of:

- Very Good.
- Good.
- Adequate.
- Poor.
- Very Poor.

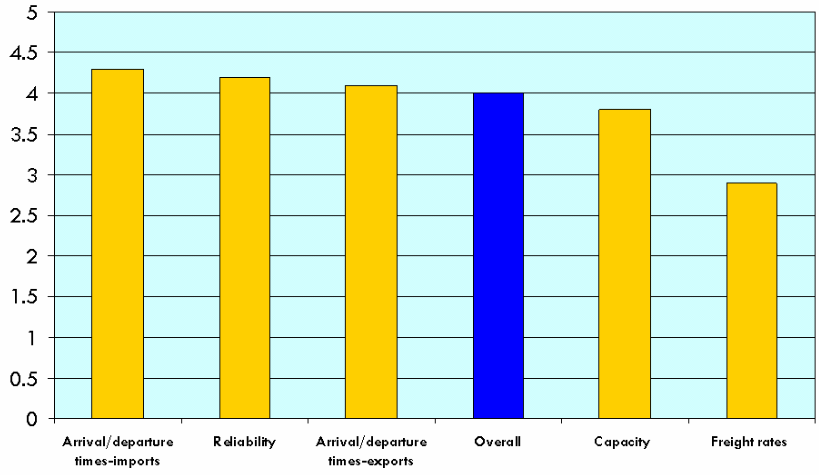
Average weighted scores, after excluding "Don't Know"s, were calculated by assigning a score to the number of responses to each of the categories as follows:

- Very Good-5.
- Good-4.
- Adequate-3.
- Poor-2.
- Very Poor-1.

Thus the higher the score the better the particular aspect is rated. The results are shown at **Figure 6.5**, over.

Most aspects are scored at 4.0 or above:-that is, "good" or better. The services are given an overall average of 4.0 which is equal to "good". Arrival and departure times and reliability receive the highest ratings. The services perform less well in terms of capacity and, in particular, freight rates. The average score for the latter is less than "adequate".

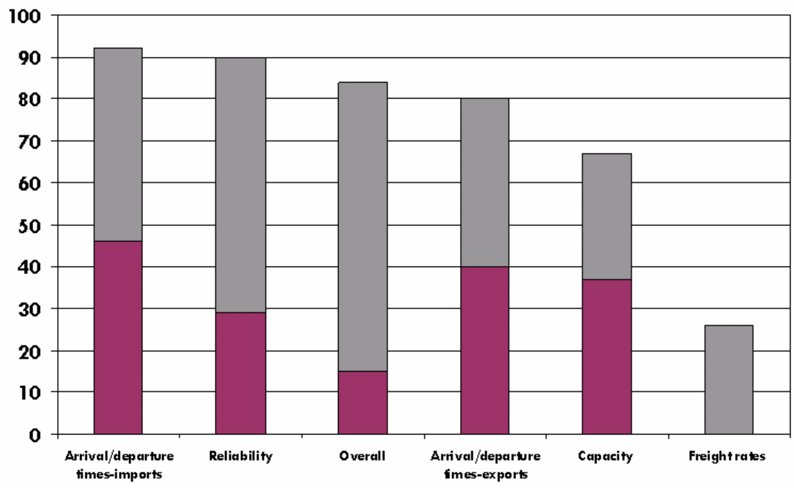
Figure 6.5: Businesses: Rating of Freight Shipping Services



In the case of capacity some companies reporting difficulties in chartering bulk vessels when goods needed to be imported or when market prices made it advantageous to export commodities from Shetland.

Within the average scores there are variations around the mean. **Figure 6.6** shows the proportion of respondents that considered the specific aspects of freight shipping services to be either "very good" or "good".

Figure 6.6: Businesses: Rating of Aspects of Freight Shipping Services as Very Good or Good (% of Respondents)



Note: Excludes "Don't Know"s

Overall, 84% rate the services as either "good" or "very good". However, only 15% consider it to be the latter. This appears to reflect the generally low score for the freight rates, which a majority view to be, at best, "adequate" and none considers to be "very good". The other aspects of the services are viewed much more positively. In each case, over 60% consider them to be "good" or "very good".

Most of the companies offering a view did not identify possible changes to external freight services that would benefit their business. The main one that was mentioned was, unsurprisingly, lower freight rates. The other was changes to arrival and departure times of sailings. Some exporters were seeking a 1900 departure from Lerwick on every day of the week, in order to give more time for production and packing during the working day. This view was supported by a number of consultees, including hauliers.

Some other companies, and again also some consultees, would appreciate an earlier arrival time for the Northlink passenger vessel into Lerwick. An arrival at 0630 or 0700 would allow freight to be unloaded and delivered to customers earlier in the working day.

6.5 BUSINESS TRIPS BY SHETLAND COMPANIES

6.5.1 Number of Business Trips

Almost all (twenty nine) of the companies provided information on the business trips outside Shetland they had made within the past 12 months. A total of 361 return trips were reported. The average (median) per company was seven.

There was quite strong variation in the frequency of trips. Most (55%) had made less than 10 trips, with 33% making fewer than five trips. At the other end of the scale, one fifth of the companies had made 20 or more trips.

6.5.2 Mode of Transport Used

Air dominated the business trips undertaken. It accounted for 86% of the total trips across our sample. Only 14% were made by ferry. Despite this, a significant proportion of companies did make some use of the ferry services. Across the companies:

- 52% used only air services for their business trips.
- 45% used both air and ferry.
- 3% used only the ferry.

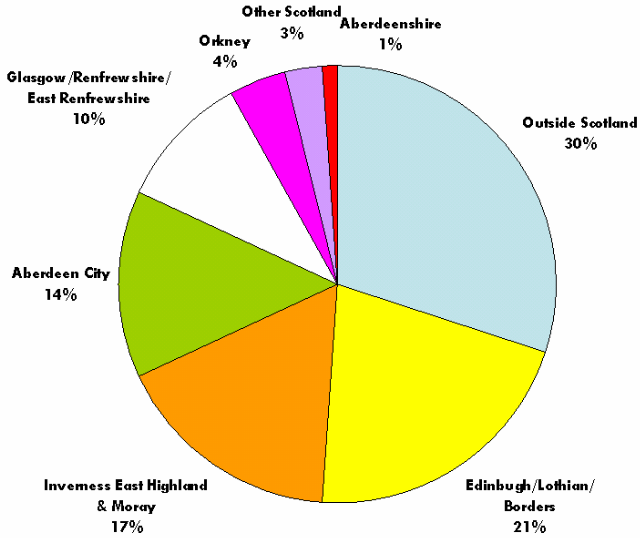
Thus almost half (48%) made at least some use of the ferry. However, in most cases the number of trips was slight and well below the number made by air.

6.5.3 Trip Destinations

All Business Trips

Figure 6.7, over, shows the final destinations for all business trips made by our sample. The data exclude the small number of trips where the respondent did specify the destination.

Figure 6.7: Businesses: Final Destination of All Business Trips



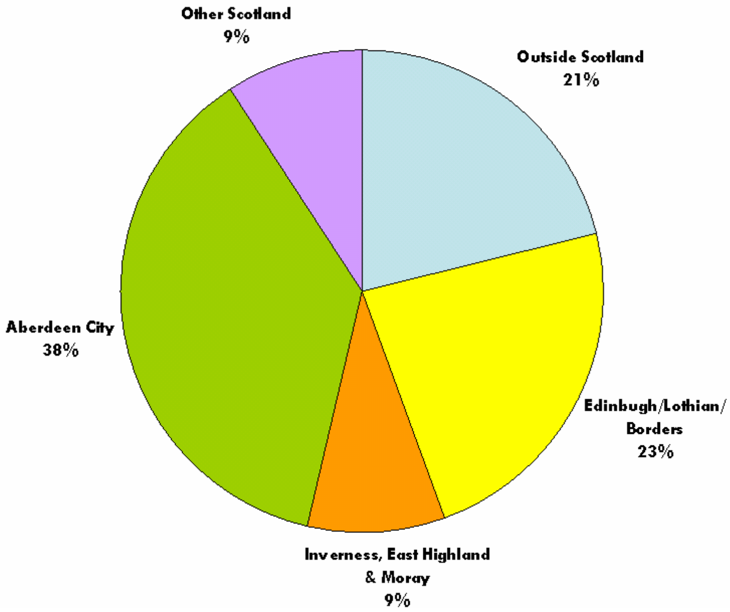
More than half (70%) of trips have final destinations within Scotland. The main ones are to Edinburgh/Lothian/Borders and Inverness, East Highland & Moray.

Aberdeen City has a relatively low share of trips. It accounts for around one in seven. However, it is still important to some of the companies we surveyed.

Business Trips By Ferry

Figure 6.8 provides the same analysis but solely for those business trips made by ferry.

Figure 6.8: Businesses: Final Destination of Business Trips Made By Ferry



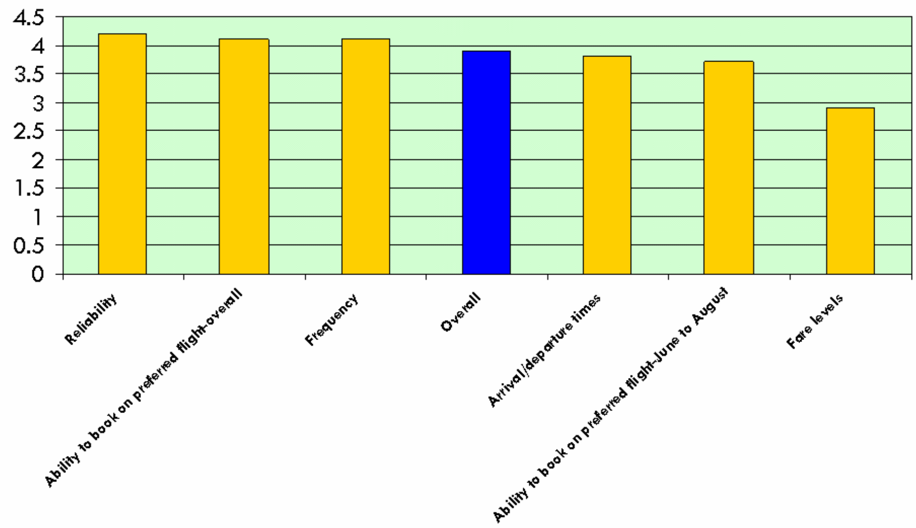
The geographic distribution of trips by ferry is different from that for all trips. A key difference is that Aberdeen City is the most common destination-for 38% of ferry trips compared to only 14% for all trips. In contrast, Edinburgh/Lothian/Borders and outside Scotland are significant trip ends for both air and ferry.

6.6 SATISFACTION WITH AIR SERVICES FOR BUSINESS TRAVEL

Those companies that had made business trips by air in the last 12 months were asked to rate a number of aspects of the air passenger services in terms of their company's travel needs.

The results are reported below, on the same basis as for the freight services (shown at **6.4**). Average weighted scores are graphed at **Figure 6.9**

Figure 6.9: Businesses: Rating of Air Passenger Services

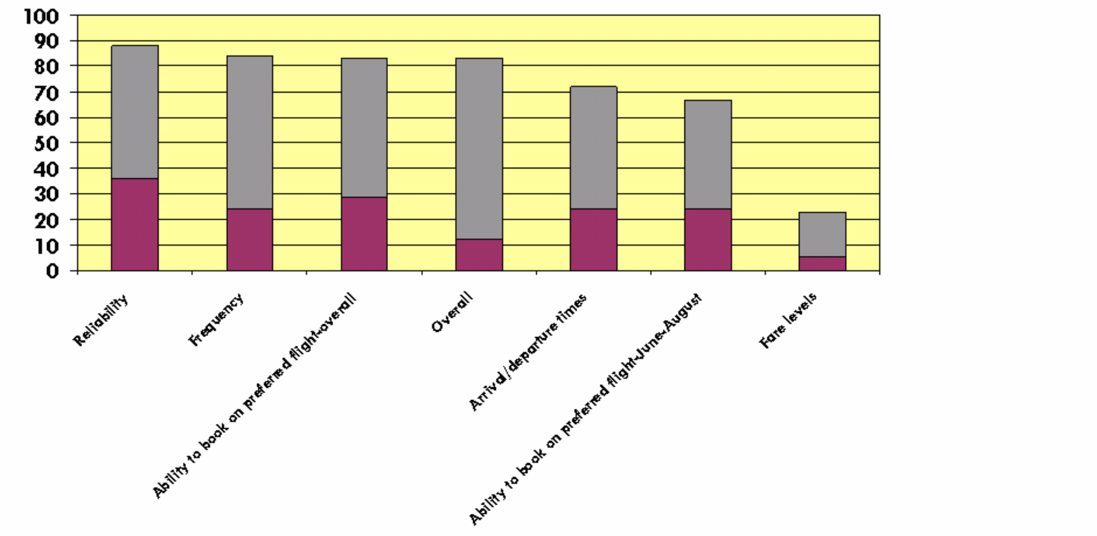


Overall, the services are rated at 3.9: that is, slightly less than "good". Reliability, ability to travel on one's preferred flight and frequency are all rated as better than "good". Being able to travel on a preferred flight during the midsummer months is seen as less easy than at other times of the year, but not greatly so. Again, fare levels receive the lowest rating-slightly less than "adequate".

Within the average scores there are variations around the mean. **Figure 6.10**, over, shows the proportion of respondents that considered the specific aspects of the air services to be either "very good" or "good".

For all but one aspect, more than two thirds rate the services as either "very good" or "good". Again, the exception is fares, which are, in effect, rated as at best no more than "adequate" by three quarters of respondents. This appears to affect the overall perception of the air services. While 83% rate the services, overall, as better than "adequate" only 12% consider them to be "very good".

Figure 6.10: Businesses: Rating of Aspects of Air Passenger Services as Very Good or Good (% of Respondents)



Note: Excludes "Don't Know"s

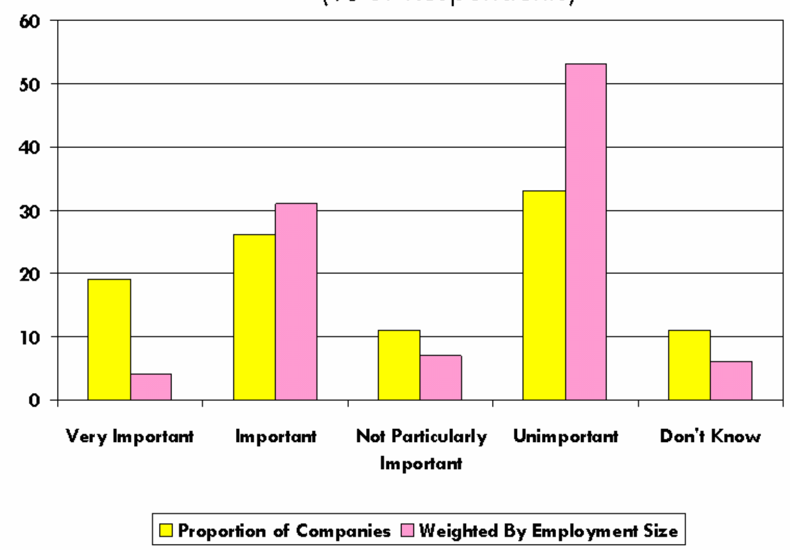
Most of the companies are satisfied with the range of airports served from Sumburgh. Very few identified other airports that would be useful for their company's business trips.

6.7 MAINLAND PORT ISSUES

6.7.1 Importance of Aberdeen

Businesses were asked how important it was to their business that the ferry service sails to Aberdeen rather than to another port on the Scottish mainland. The results are shown at **Figure 6.11**.

Figure 6.11: Businesses: Importance of Ferry Service Sailing to Aberdeen Rather Than to Another Scottish Mainland Port (% of Respondents)



They are expressed both in terms of the proportion of the sample and the proportion of sample weighted by FTE employment. The latter measure shows how the results vary by size of company.

In terms of the sample, almost equal numbers of companies saw Aberdeen as in some ways important and in some ways unimportant. The most common responses were "unimportant" (33%) and "important" (26%).

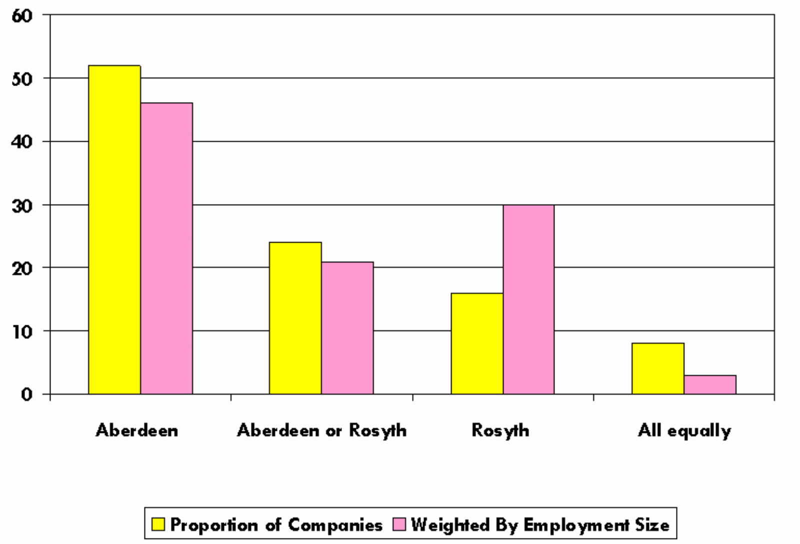
The picture is different, however, once the responses are weighted by companies' employment levels. Under this measure, the proportion reporting "unimportant" increases to over half (53%). The results show that those perceiving that sailing to Aberdeen is "very important" tend to be smaller companies. In contrast, those viewing Aberdeen as "unimportant" tend to be among the larger employers.

6.7.2 Most Suitable Mainland Port For Business Requirements

Businesses were asked which, among a list of possible mainland ports, would be most suitable for meeting their business' requirements. The list encompassed Aberdeen, Rosyth and Peterhead.

The responses are shown at **Figure 6.12**. Again, they are shown as a proportion of respondents and also weighted by respondents' employment size.

Figure 6.12: Businesses: Which Mainland Port Would Be Most Suitable for Your Business' Requirements? (% of Respondents)



As a proportion of the respondent companies, Aberdeen is clearly the preference. It was the choice of slightly more than half of the interviewees. Aberdeen and Rosyth were seen as equally suitable by one in four companies, with Rosyth alone selected by one in. There was very little support for Peterhead. The results indicate that some of those who stated that Aberdeen had limited or no importance to their business still chose it as their preferred port.

The results do not changed markedly after the responses are weighted by employment. Clearly, Rosyth is attractive to those who are larger employers. However, Aberdeen remains the overall first preference of the sample of companies.

Companies' selection of port is largely dictated by whether the company has suppliers, other business contacts or another of its sites in the vicinity of the port. This was also the case for the hauliers we consulted for the study. In the case of Rosyth, importance was also attached to the proximity of the port to the final destination within Scotland of products being exported from Shetland.

Some companies that have existing links with Aberdeen City were prepared to select other ports on the basis that supplier links could be developed in other parts of Scotland. However, in most cases where existing business links were with Aberdeen City and the surrounding area, these were seen as being sufficiently important for the company to choose Aberdeen as the preferred mainland port.

6.8 LIVESTOCK

The main points from our consultations with livestock interests were that:

- At the time of the consultation there were details to be ironed out about the new system of exporting sheep and cattle from Shetland. This was to be based on purpose built containers travelling on Northlink services, rather than the previous dedicated livestock boats. One of the main areas of uncertainty at that time was the price per head that would be charged.
- The number of sheep being exported has fallen in recent years. This reflects industry-specific factors rather than anything about external transport services.
- Exports are from producers throughout Shetland.
- Sheep exports are highly concentrated in the period between late September and November.
- Relatively few sheep are processed on Shetland. Most are exported for finishing on the Scottish mainland.
- The main routes for exports are: dealers buying direct from Shetland producers; sales through the mart in Shetland; and sales at mainland marts.
- The most significant of these is sales through mainland marts and in particular at Thainstone in Aberdeenshire. Thainstone sells more than one and half times the number of Shetland lambs that are sold via Shetland's own mart.
- A majority of Shetland lambs are finished in the north of Scotland, with the north-east and Aberdeenshire being particularly important.
- The number of cattle exported are significantly less than sheep. Again, the destinations are mainly in north/north-east Scotland.

6.9 AIR FREIGHT

6.9.1 Newspapers and Periodicals

These account for the vast majority of inbound air freight in terms of frequency of delivery and overall volumes. The highest volumes are on the scheduled service from Aberdeen, with newspapers also delivered from Inverness Airport. Less time sensitive publications are moved by ferry from Aberdeen.

6.9.2 Mails

These are moved to/from Shetland by a freight plane six days per week. We understand that the volume of inbound mail is much greater than that outbound. As reported earlier, two of the companies surveyed use Parcelforce to move exports from Shetland.

6.9.3 Other Cargoes

Other cargoes include:

- On a regular basis, flowers flown from Inverness.
- On a less regular basis, bakery products between Orkney and Shetland and live fish exports from Shetland. We understand that there have been efforts in the past to fly more fish from Shetland. However, these have generally been unsuccessful due to cost and the perceived greater reliability of transport by ferry than by air.

One marine engineering company in our survey make use of air freight to bring in urgently required parts for local vessels. This can be as often as once a week.

The company are generally quite satisfied with the air freight services, with most use being made of scheduled flights from Aberdeen. However, they raised the following issues, that:

- The reliability of delivery can be affected by fog. If a part is required very urgently one will also be placed on the ferry from Aberdeen in case the plane service is cancelled.
- On occasion, freight is not carried on flights if these are full with passengers- notably when there has been a backlog of flights due to cancellations.
- In some cases it has not been possible to move urgently required parts by air because they are too heavy and/or too bulky.

6.9.4 Summary

The main points to note on air freight are that:

- Volumes are low in terms of tonnes moved.
- Volumes are heavily skewed towards imports, with newspapers and mails the most frequent and highest volume cargoes.

- Aberdeen is the most important mainland airport for air freight to/from Shetland.

6.10 COMPARISON WITH FINDINGS FOR SHETLAND RESIDENTS

Compared to the results for Shetland residents shown at **Chapter 3,** the findings are that businesses:

- Have stronger links to Edinburgh/Lothian/Borders and Glasgow/Renfrewshire/East Renfrewshire and less strong ones to Aberdeen City, in terms of freight traffic.
- Make a greater proportion of passenger trips by ferry to Edinburgh/Lothian/Borders.
- Make a greater proportion of air passenger trips to Edinburgh/Lothian/Borders and much lower levels to Aberdeen City.
- Consistently give higher ratings to air services, apart from for fare levels.
- Attach less importance to Aberdeen as the mainland port.
- Are much more likely to view Rosyth as a suitable mainland port.

7 CONCLUSIONS

7.1 INTRODUCTION

The research conducted for this study has amassed a large amount of information on travel patterns and on users' views of the transport services and potential changes to them. This Chapter highlights the main themes that emerge from the research as a whole.

7.2 TRAVEL COSTS ARE THE KEY ISSUE

Cost was consistently highlighted as the area of least satisfaction. This is across all users-residents, visitors and Shetland businesses. Apart from visitors travelling by ferry, fare levels are regarded as less than "adequate". In particular, they are not well regarded by visitors using the air services.

Based on the online survey, cost is deterring some potential visitors to Shetland. It is a greater deterrent than any other transport-related factor, including the overall journey time to Shetland. Cost was also the most significant potential deterrent to existing visitors making repeat trips-especially for those travelling by air. The transport challenge facing Shetland is magnified by the fact its main tourism competitor appears to be the UK mainland rather than other Scottish islands.

The challenge going forward will be to address the cost issue while still maintaining what users value about existing transport services.

7.3 GENERAL SATISFACTION WITH EXISTING PROVISION

Apart from cost, there is general satisfaction with the existing services. In particular the services are seen as reliable. They also generally have the capacity for travel on their preferred flight or sailing. This is an important factor in visitors' decision whether or not to visit Shetland.

There are, however, some specific areas of concern to some users. For example, the business survey identified that:

- Commenting on fares in general could be difficult as the levels charged on air services depend on how far in advance a ticket is booked.
- Sea freight capacity scored reasonably well among Shetland businesses. This reflects the availability of passenger and ro-ro freight vessels and a lo-lo service. However, there are specific issues facing some Shetland companies that require to charter bulk vessels.
- Air service frequency and timings are quite well regarded. However, this was less so for some routes-notably Glasgow.

Residents reported some difficulties in booking cabins and flights in the midsummer months due to a lack of capacity. Further, a majority are of the view that there are still not enough cabin spaces on the Northlink vessels.

Despite this, almost all residents were able to travel on their preferred flight or sailing on their most recent trip to the mainland. In addition, the surveys show little evidence of capacity constraints having deterred potential visitors from travelling to Shetland.

The air and shipping services are equally important to Shetland. Visitors choose between the two modes according to relative cost, journey time and the need/desire to travel with one's own vehicle. Residents will make use of different modes for different types of journeys. Shetland companies make most business trips by air-but are very heavily reliant on shipping for the movement of goods to and from the islands.

The quality of transport provision outside Shetland is important to overall travel to/from the islands. More than one in five visitor and resident air trips involve connecting with an onward flight outside Shetland. Use is also made of surface public transport for onward journeys on the Scottish mainland. Some interest was expressed in shuttle bus connections to rail and bus stations in Aberdeen to better join up the journeys being made.

To reiterate, there is general satisfaction with existing transport services, aside from fare levels. However, an issue going forward will be maintaining capacity and reliability as demand continues to grow and users' expectations increase over time. This suggests that new developments and opportunities should be considered-particularly where they can reduce travel costs.

7.4 TRIP ORIGINS AND DESTINATIONS

The survey results show a wide range of trip ends outside Shetland. For **trips by air**, travel to/from outside Scotland is for all travellers and especially for visitors. Aberdeen City is particularly important for residents' trips and, to a lesser extent, for those made by visitors. For business travel from Shetland, Edinburgh/Lothian/Borders is more important than Aberdeen City but the latter is still significant for some companies.

For **trips by ferry**, Aberdeen City is particularly important for residents and for trips that Shetland businesses make by sea. For visitors, trips to/from outside Scotland are particularly significant, while Aberdeen City and Edinburgh/Lothian/Borders are equally important trip ends.

Overall, while Aberdeen City accounts for only a minority of trip ends, and is less important for freight than passenger movements, it is generally the most important trip end within Scotland.

7.5 MAINLAND FERRY PORT ISSUES

Where people are travelling to/from outside Shetland will influence how they view the choice of mainland port. However, selecting a port also raises the issue of road and public transport links for onward travel to the final destination, rather than simply the facilities in the town or city around the port itself.

Among the various user groups, Aberdeen is most important to Shetland residents. It was of less importance to visitors and Shetland businesses. However, the importance of Aberdeen cannot be viewed in isolation from the pros and cons of the alternatives. For all user groups, Aberdeen was the preferred port rather than Rosyth or Peterhead.

For passenger travel one of Aberdeen's key attractions is its onward transport connections compared to those available from Rosyth or Peterhead. It is also important to residents for its link with friends and relatives in Aberdeen City and Aberdeenshire, as well as access to health services.

There are uncertainties around what, say, a Rosyth service could look like in terms of sailing times and frequency and, especially, fare levels. Despite this, the vast majority of residents felt they had sufficient information to make a selection-and that was largely in favour of Aberdeen.

7.6 TRAVEL TO SUMBURGH AIRPORT

At face value use of the bus service to Sumburgh Airport looks low. Some 4% of residents and 10% of visitors used the service on their most recent trip.

However, these figures need to be benchmarked against those for other airports. On the inbound leg to Shetland, only 6% of visitors had used a scheduled bus service to reach the airport from where they flew to Sumburgh. Data from the 2005 CAA Passenger Survey show that the share of bus/coach for travel to other Scottish airports was less than 7% at each of Prestwick, Inverness and Aberdeen, although over 10% at Glasgow and Edinburgh.

In this context, the usage of the Sumburgh bus service does not appear too modest. There will always be limits to the share of travel to an airport which the bus can achieve. For Shetland it is constrained by a limited ability to attract those who do not live on the route between Lerwick and Sumburgh.

There does not appear to be a large pool of potential users of the bus service. This is because very few residents and visitors who had not used the service even considered it as an option. The main possibility for increasing patronage lies in adjusting the timetable to meet as many flights as possible and publicising this fact to potential passengers.

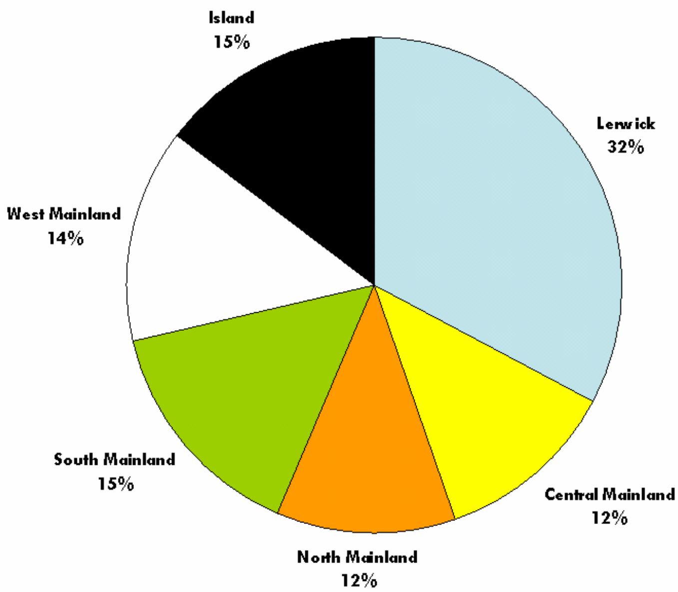
<u>Appendices</u>

A: Survey Sample Profiles
B: List of Consultees
C: Maps

A SURVEY SAMPLE PROFILES

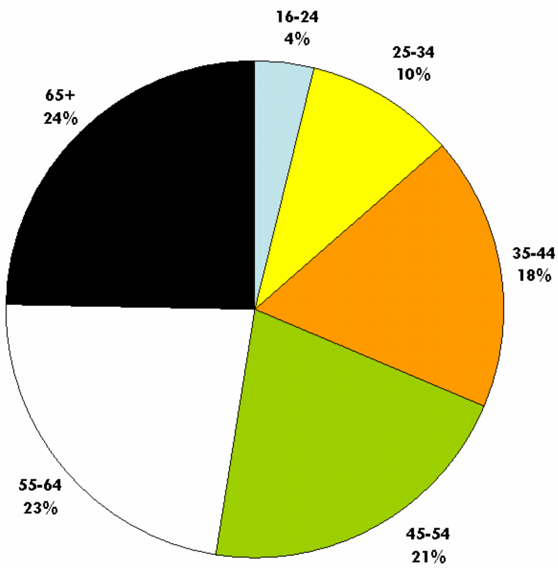
A.1 SHETLAND RESIDENTS

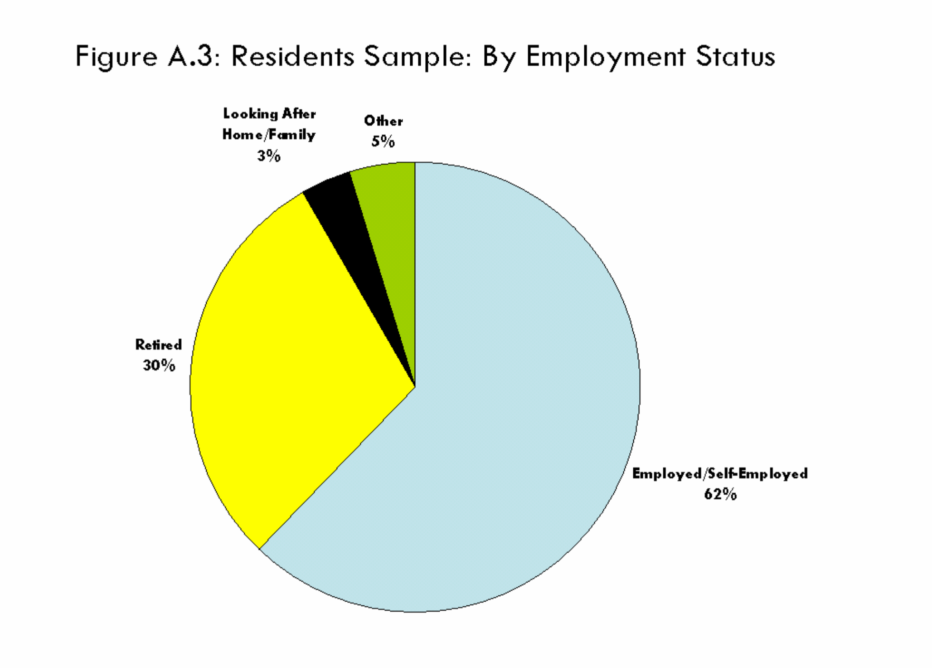
Figure A.1: Residents Sample: By Place of Residence



"Island" interviews were undertaken with residents on each of Shetland's inhabited islands. Reflecting the population distribution, the largest numbers of interviews were with residents of: Whalsay (4% of total sample); Yell (4%); and Unst (3%).

Figure A.2: Residents Sample: By Age





61% of interviewees were female. 39% were male.

A.2 VISITORS DEPARTING SHETLAND BY AIR

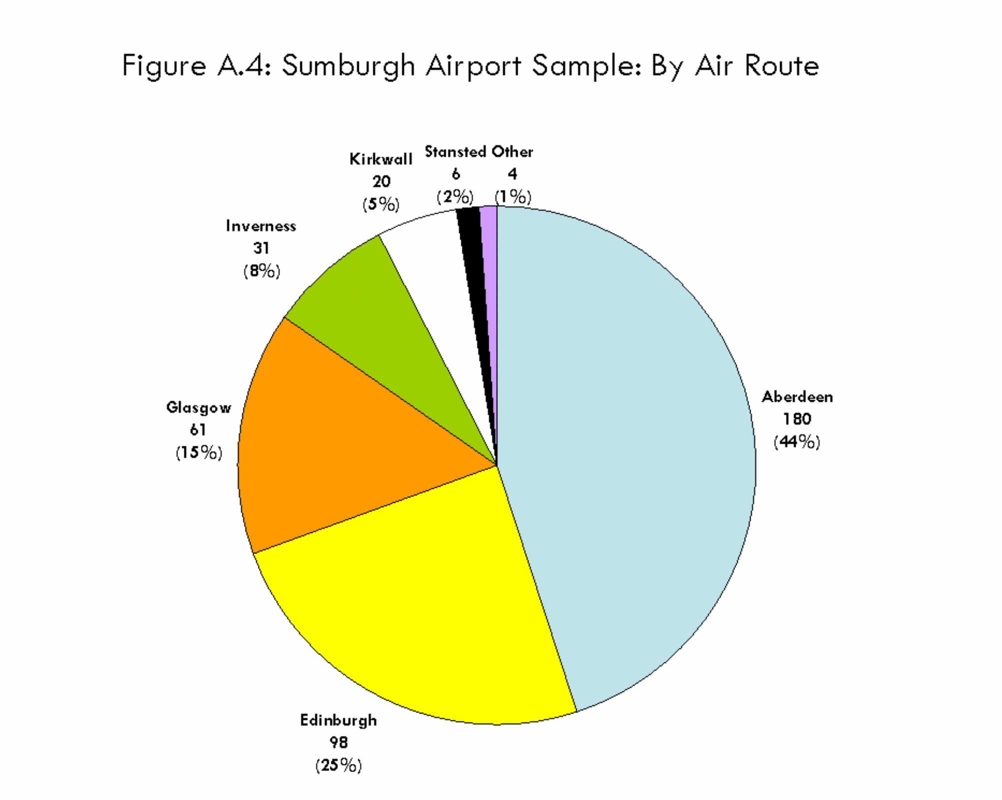


Figure A.5: Sumburgh Airport Sample: By Age

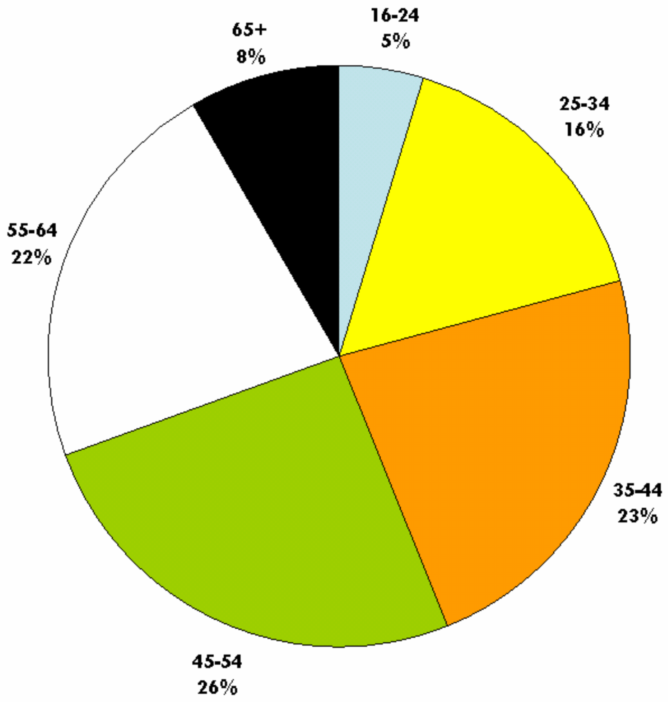
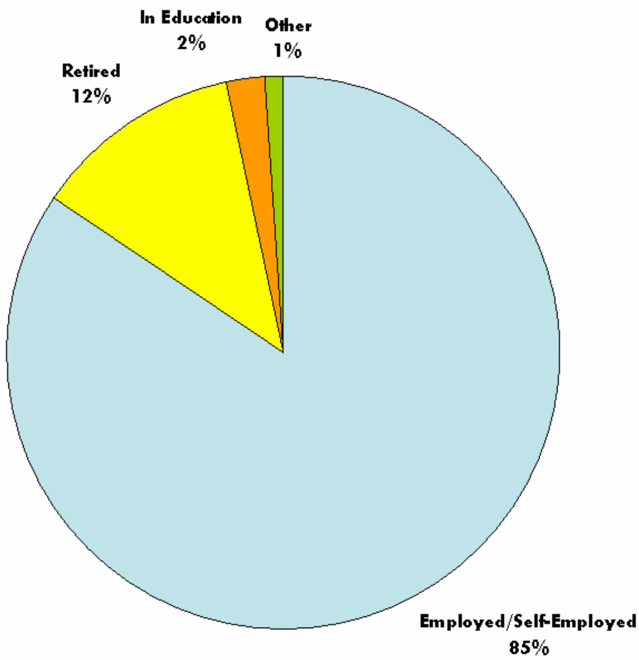


Figure A.6: Sumburgh Airport Sample: By Employment Status



65% of interviewees were male. 35% were female.

A.3 VISITORS DEPARTING SHETLAND BY FERRY

Figure A.7: Lerwick Ferry Terminal Sample: By Age

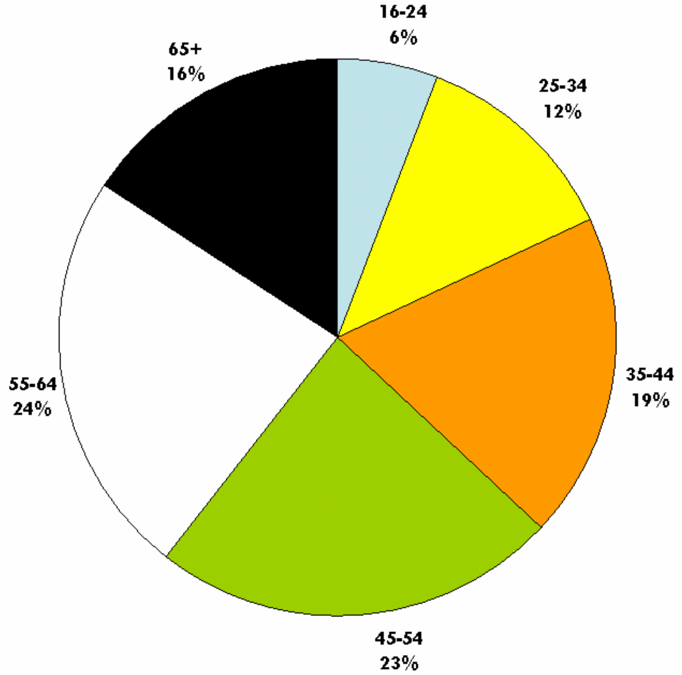
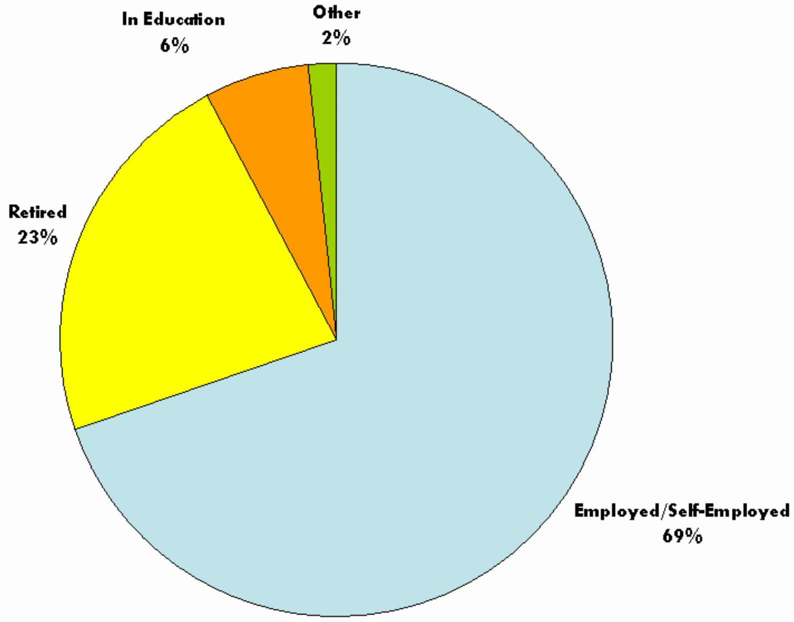


Figure A.8: Lerwick Ferry Terminal Sample: By Employment Status



66% of interviewees were male. 34% were female.

A.4 ON-LINE SURVEY: ACTUAL AND POTENTIAL VISITORS

Figure A.9: Online Sample: By Age

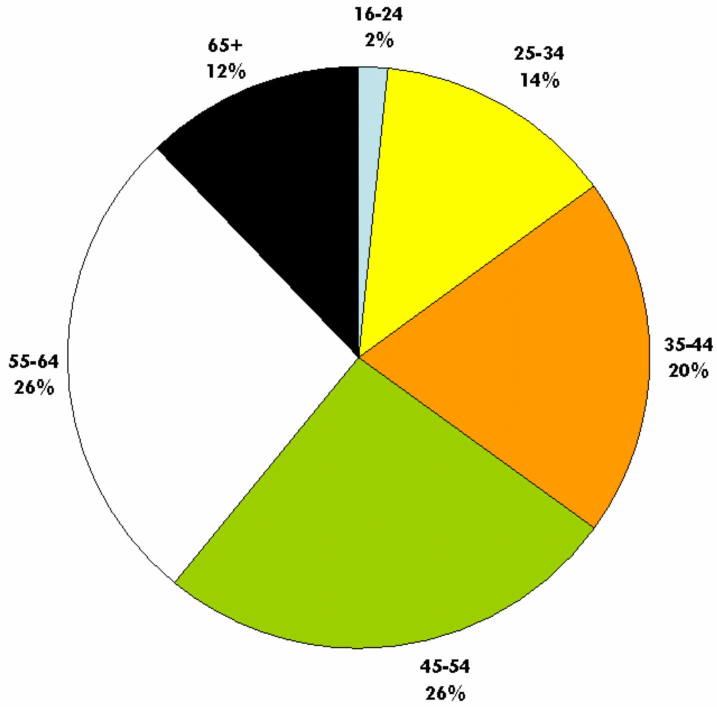
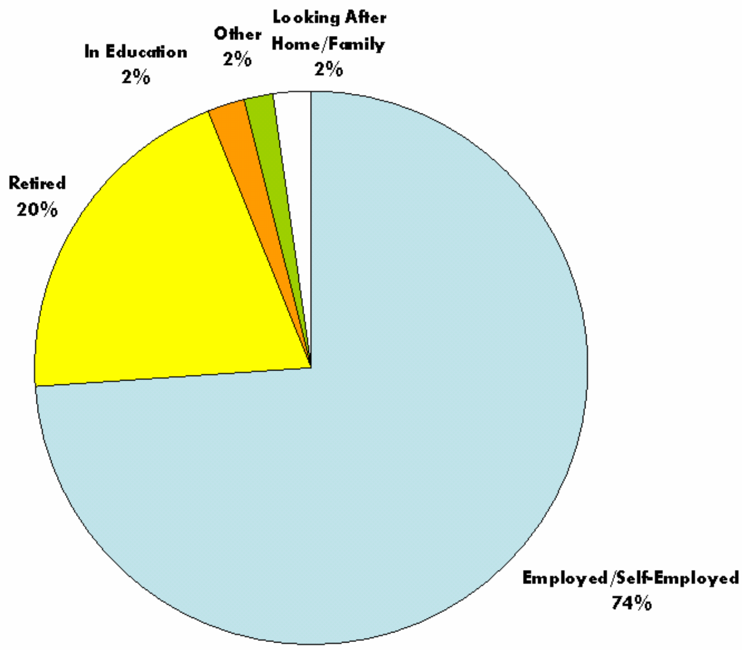


Figure A.10: Online Sample: By Employment Status



53% of respondents were female. 47% were male.

Place of residence was collected in terms of the ITV region in which respondents lived. This showed that:

- 69% lived in England.
- 25% lived in Scotland.

Some 3% lived in the Border TV region which includes parts of Scotland and England and also the Isle of Man. A further 2% lived in Northern Ireland or the Channel Islands.

B CONSULTEES

Air Operators

BenAir
Highland Airways
HIAL (Sumburgh)
Loganair

Hauliers

JBT
Streamline

Sectoral Organisations

National Farmers Union
Shetland Aquaculture
Shetland Livestock Marketing Group

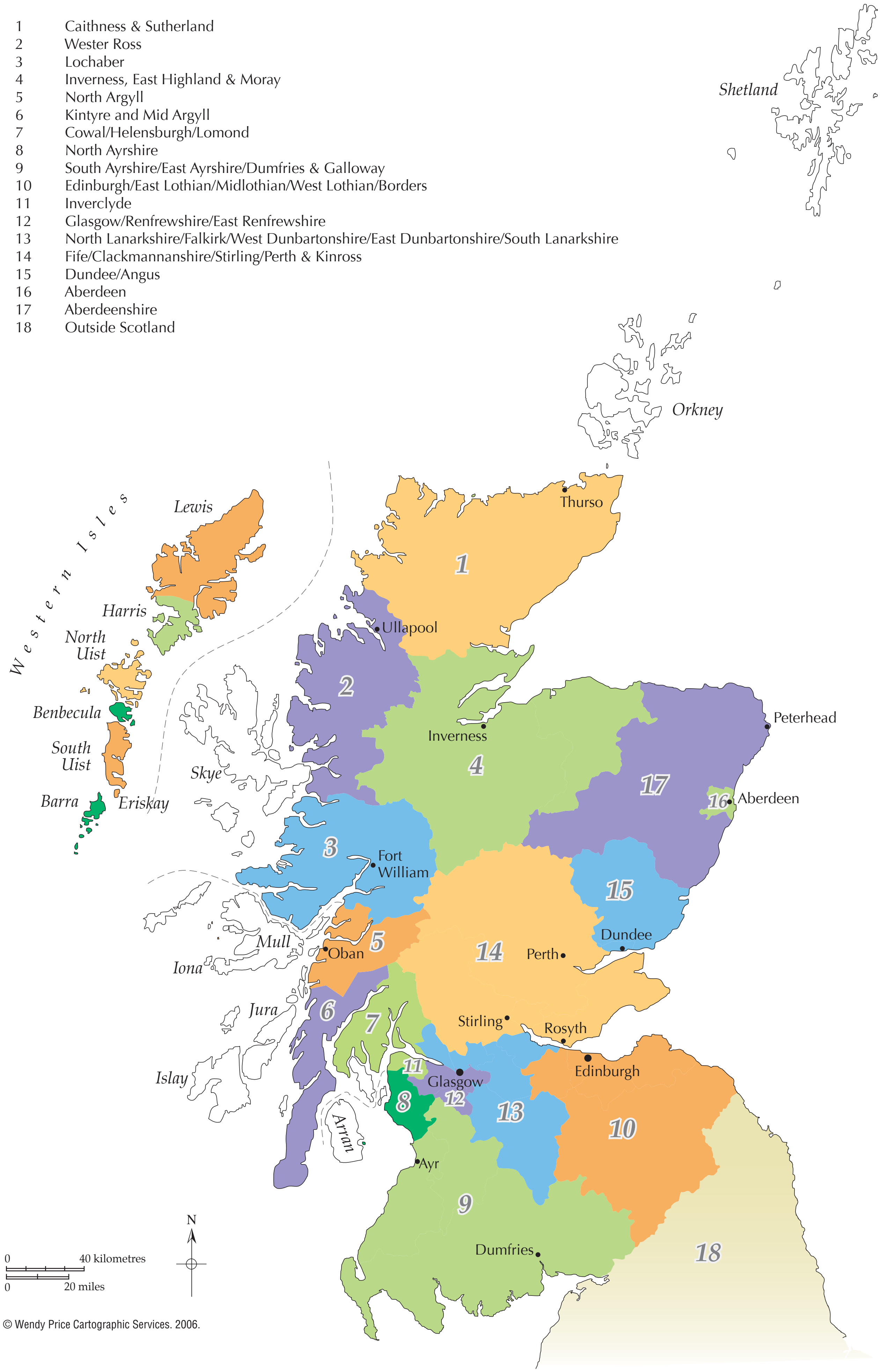
Education

Aberdeen College
The Robert Gordon University, Aberdeen

Other

Lerwick Harbour Authority
NHS Shetland

C: MAPS



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
Shetland
Orkney
Western Isles
Lewis
Harris
North Uist
Benbecula
South Uist
Barra
Eriskay
Skye
Mull
Iona
Jura
Islay
Arran
Thurso
Ullapool
Inverness
Peterhead
Aberdeen
Fort William
Oban
Perth
Dundee
Stirling
Rosyth
Edinburgh
Glasgow
Ayr
Dumfries
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N
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40 kilometres
0
20 miles

SHETLAND ISLANDS