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

Thematic summary

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Context

This summary presents key findings from the analysis of responses to a public consultation on the next Northern Isles Ferry Services contract (NIFS4). The consultation ran from 22 July and until 20 October 2025 and asked 18 questions. The focus was on providing an opportunity to contribute to the contract development process and to shaping the future of ferry services.

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

Profile of responses

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

The considerable majority of respondents (98% or 1,107 respondents) were individual members of the public. Only 2% of responses came from organisations.

Of the 1,107 individual respondents, a majority – 67% – were Shetland based, and 23% were Orkney based. Among the remaining 10%, the largest group were NIFS network users based on the Scottish mainland, followed by NIFS visitors or tourists.

Overall respondents used the Aberdeen - Lerwick service most frequently (73% of all respondents rising to 99% of Shetland residents). Orkney residents were most likely to use the Scrabster - Stromness route (62%), although a substantial minority (32%) indicated that they use Aberdeen - Kirkwall most frequently.

Respondents were most likely to say they use NIFS services 'occasionally', followed by 'once a month', and to report using NIFS services mainly for personal/leisure use, followed by for work/education reasons.

In addition to the online consultation, Transport Scotland undertook engagement events in Lerwick (Shetland), Kirkwall (Orkney) and Stromness (Orkney), with 104 members of the public taking part. Feedback from those events was also considered as part of the analysis.

Capacity – crossings and cabins

For many respondents, issues relating to overall capacity, and particularly not being able to travel other than when planned and booked well in advance, were a primary concern. These concerns often informed respondents' views on a range of other issues – for example, to

support urgent travel there were calls for increased total capacity for both cabins and vehicles (particularly during the summer months), with larger vessels or a larger fleet and more sailings.

Reflecting the more general issues relating to capacity, there were specific concerns about being unable to secure a cabin, especially for longer crossings. Perceived reasons for this lack of capacity included a reduction in the number of available berths since it is no longer an option to book a single berth in shared cabin, with some calling for this facility to be reinstated.

Quality and cost – cabins, pods and reclining seats

Respondents tended to be positive about the quality of cabins, with references to them being clean and comfortable. Any concerns tended to relate to them being small or in need of upgrading. There were also suggestions that noise can be an issue.

The high cost of cabins was an issue for some respondents because the inability to book a berth in a shared cabin means that single travellers have to book a larger cabin than they need. The current pricing structure was also seen as contributing to the capacity problem since inside 4-berth cabins are cheaper than outside 2-berth cabins.

While the feedback around cabins was generally positive, this was not the case for the overnight pods, with descriptions including that they are not fit-for purpose. Specific issues raised included that pods are uncomfortable, particularly for taller passengers, that there is very limited space between pods, and that there is a lack of privacy. Similar issues were raised in relation to reclining seats, including that they are uncomfortable and, like the pods, do not allow the user to lie flat or to sleep.

Price relative to cabins was one of the positive reasons given for choosing a reclining seat or a pod, with a ‘Local authority or transport partnership’ respondent seeing pods as a good mid-price option, providing improved passenger comfort while using space efficiently. Some respondents saw reclining or standard seats as an acceptable budget option with a view that they are preferable to pods.

Late cancellation fees

A majority of all respondents – 60% of those who answered the question – agreed, with the idea of implementing a late cancellation fee for pre-booked tickets. A cancellation fee tended to be seen as fair and justified in view of limited availability, albeit with various safeguards in place to avoid people being penalised for events beyond their control. Encouraging people to cancel bookings they do not intend to use was seen as necessary to free up capacity.

Reasons given for not supporting a late cancellation fee included that flexibility is an important aspect of the current booking system and that a lifeline service should allow such flexibility as

people's plans will change. A 'Farming or land management organisation' respondent reported that as a business dealing with uncertainty on dates and inadequate capacity, their only option is to make advance bookings that they may have to cancel.

Unplanned and essential travel

When asked what the operator could do to further support those who need to travel urgently, the most frequent suggestions related reserving capacity for emergency travel, either setting aside cabins or vehicle space for emergency use, or reserving capacity for lifeline travel. Shetland residents were more likely to highlight the need to reserve cabins for emergency use while a larger proportion of Orkney residents commented on the importance of vehicle space. There were also calls to 'prioritise' travel for islanders or to keep an allocation of cabins or vehicle space for use by local residents.

With respect to how any reserved capacity for urgent travel might be managed suggestions included that criteria for access to reserved space would need to be defined clearly and that the waiting list should prioritise those needing to travel in an emergency ahead of other users.

Fares – RET and dynamic pricing

The Road Equivalent Tariff (RET) is a distance-based fares structure with a formula for calculating fares comprising a fixed element and a rate per mile. RET fares were rolled out across all Clyde and Hebrides Ferry Services (CHFS) routes by October 2015. A majority of respondents – 61% of those who answered the question – said they would like to see RET fares for islanders on NIFS routes. However, while 84% of Orkney residents agreed with RET fares, this fell to only 52% of Shetland residents.

The high cost of travel to the Northern Isles, a desire to see reduced fares, and fairness in relation to other areas of the ferry network were most likely to be given as reasons for supporting RET fares for islanders. Respondents from Orkney were most likely to cite fairness as a reason for supporting RET fares with some noting that these fares are already available on services in the CHFS area. This view was apparently linked to an expectation that application of the RET formula would reduce fares to Orkney.

In contrast, the most frequent point from Shetland residents was that they would support RET fares *only* if prices were reduced as a result. A view that RET fares might be more expensive, particularly for Shetland, was the main reason for not supporting their introduction.

A majority of respondents – 71% of those who answered the question – said they would like to see more dynamic pricing for visitors. The most frequent comment was that tourists should pay more than local residents for ferry travel or, alternatively, that costs for islanders should be reduced. The need to manage demand (particularly at peak season) in view of limited capacity

and a perception that the current service is designed / operated for the benefit of tourists rather than islanders were also cited.

Reasons given for not supporting dynamic pricing for visitors included disagreement with the principle of dynamic pricing, a view that what is required is more capacity not reduced demand, and concerns with respect to potentially negative impacts on the tourism sector and, by extension, on island economies. An alternative perspective was that many tourists already book well in advance and dynamic pricing for visitors could provide an even greater incentive to do so.

Connectivity – public transport and active travel

In relation to public transport, it was suggested that the NIFS operator should engage with other relevant transport providers, such as train and bus companies, to align ferry and other public transport timetables. Orkney residents were particularly likely to see this as a priority.

On active travel, some respondents suggested that the current situation seems to be good enough or that it is hard to see what more can be done to support integration with active travel infrastructure. However, there were also suggestions for practical changes or improvements that could be made. These included ensuring there are safe and adequate end-to-end active travel routes that link the ferry terminals with town/city centres/rail or bus hubs, both on the islands and also on the mainland.

In relation to walking specifically, suggestions included improving the standard of footpaths within port areas, for example with better/even surfaces, step free routes and improved lighting. Cycling-related suggestions included having better cycle lanes in and around terminals and introducing better and secure bike shelters/parking at terminals.

Accessibility

Individual respondents highlighted a number of current issues or made specific suggestions for how services could be made more accessible going forward. A number of these related to embarkation and disembarkation, and included having more, bigger and better lifts on vessels, ensuring that the onboard parking for disabled passengers allows for easy access to the lifts and priority boarding for passengers who need to use the lift due to disabilities.

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

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

Freight

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

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

Other comments focused on how the NIFS4 operator can work with hauliers and business in relation to overall planning of commercial traffic volumes. In terms of specific areas of joint working where there could be potential for improvement (whether through NIFS4 or otherwise), there was reference to a closer working relationship between the operator and ports helping to optimise scheduling and berth management and to encouraging the sharing of information on current and future industry activity and anticipated freight volumes over the short, medium and long terms.

There was strong support for the introduction of additional freight and passenger capacity when the two Freight Flex vessels come into service in 2029. Associated comments included that their introduction represents a significant opportunity to build on the strong joint-working foundation and that current operator has with freight users.

Priorities for the next NIFS contract

Respondents were invited to select (up to) three ranked priorities for the next NIFS contract. Taking all respondents together, reliability and quality of accommodation were identified as the top priorities for the next NIFS contract, albeit with slightly more respondents ranking reliability as the top priority.

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

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



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