

Ferry Disruption Business Impacts Survey

Mull & Iona Ferry Committee and on behalf of Iona Community Council, Mull Community Council, Mull & Iona Community Trust, South West Mull & Iona Development, North West Mull Community Woodland, Visit Mull & Iona.



12/06/2023

Methodology

Between May 29th and June 5th 2023, an online survey was opened on SurveyMonkey. 105 responses were received. The following is a summary of those responses.

Opening text as used in the survey

This survey aims to quantify the financial impact of recent disruption to our ferry service on the economy of Mull and Iona. Please complete it if you are a business owner or manager based on, or doing business in Mull and Iona. Please complete only once for each business. It will serve as a first step in assessing the need for financial support from Scottish Government, and if necessary, lobbying for it.

The disruption we are concerned with is:

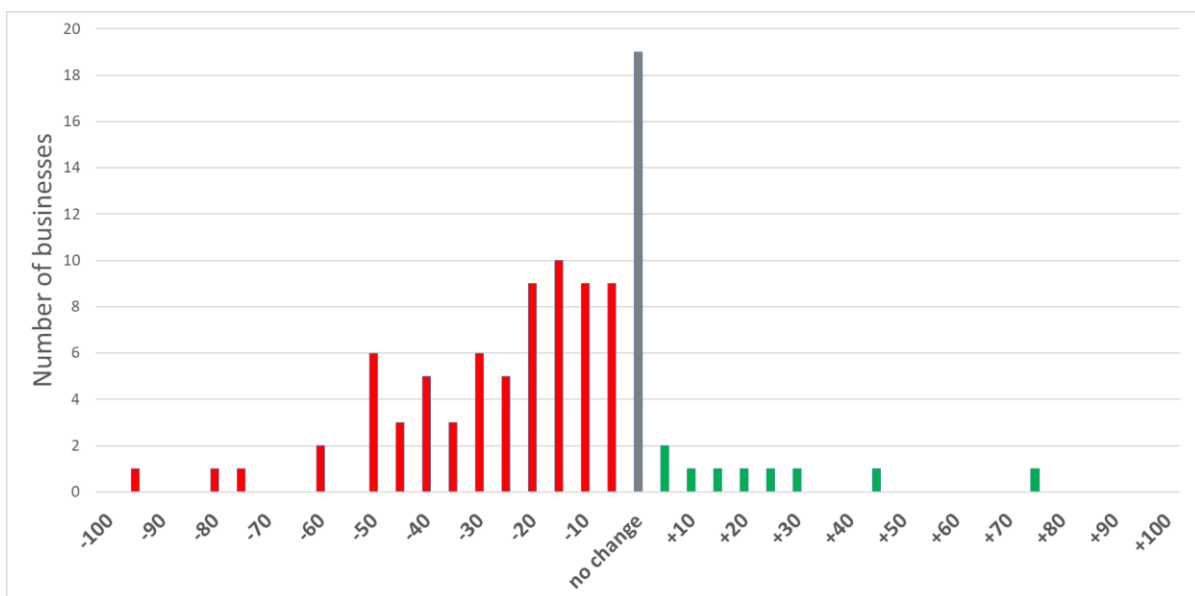
- 1. Capacity reductions and timetable disruption caused by dry-docking overruns and breakdowns through the winter of 2022/23*
- 2. Reduced capacity on the Corran ferry from October '22, and then complete outage from early April to early June.*
- 3. Capacity restrictions and timetable disruption through the early summer timetable period, caused by the delay to winter over-haul.*
- 4. Disruption caused by the introduction of CalMac's new ticketing system.*

Data gathered will be published publicly, but without making any individual business identifiable.

Q: Please quantify (in £s) the cost to your business of ferry disruption to date.

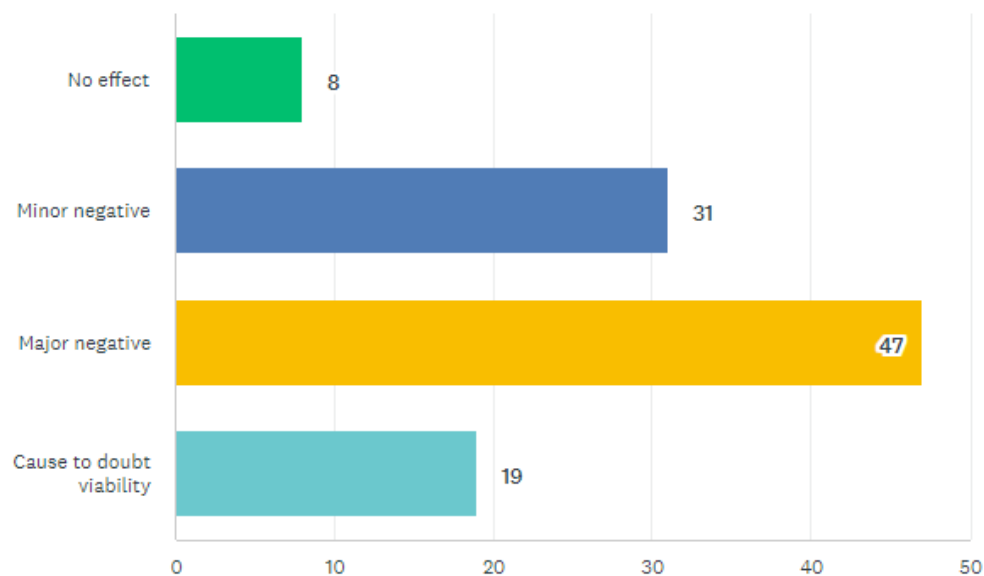
	Total of all responses	Highest single response	Average
Cost increases - delivery delays, journey disruption, increased delivery costs, overnight accommodation etc	£408,039	£150,000	£5,667
Loss of sales - bookings cancelled, reduced footfall, customers unable to get to you, failed outward deliveries etc	£1,055,456	£157,000	£12,871
TOTAL	£1,463,495		

Q: For the year to date, how has your business turnover compared with expectation?



	Number reporting	Average
Turnover increase	9	12%
No change	19	
Turnover drop	70	27%

Q: How has recent ferry disruption affected your business confidence?



Q: Use this space to succinctly describe the impact on your business.

The impact on [redacted] is far reaching and difficult to calculate as it is not just the actual disruption, but also the total lack of confidence affecting our employees, suppliers and sub-contractors who are all doing their best to avoid travelling to and from Mull? The new ticketing system has added significant to this as it is adding an additional layer of complication and hassle.

The ferry disruption was happening last year too and was a factor (along with Covid still being an issue early in the season) in our deciding not to reopen but to get on with refurbishment in the hope the 2023 season would be better. It became clear that, along with the draconian SNP legislation regarding accommodation licensing, the unreliable/unbookable ferry situation would result in so many non-bookings and last-minute cancellations (space that couldn't be rebooked if nobody could get to Mull) that we'd be unable to make a living. We therefore decided to close for good. We bought local ingredients for our breakfasts where possible and directed our visitors to local tourist businesses (eg Turus Mara) and food premises. Therefore other businesses lost out too.

All of the guests to my accommodation so far this season have had to alter their travel plans owing to ferry cancellations/alterations. Many have had to cancel days at either end of their stay to accommodate alternative crossing options. Where cancellations have occurred due to ferry disruptions or other reasons, it has been impossible to re-sell dates as no ferries have been available to book.

The main impacts, so far, are: 1. Devaluation of product value, and the customer experience and confidence: The majority of our bookings this season have faced travel disruption due to ferry problems. Primarily, ferries have been cancelled and guests have had to rebook, having to alter travel plans, and in many cases arriving a day later, or leaving a day earlier than planned (and paid for), in order to be able to make an alternative crossing. 2. Inability to sell late availability following cancellation: Cancelled dates have been impossible to resell, as there have been literally no ferry crossings available for a replacement booking. 3. Low confidence for late season and future bookings. Most of our bookings are made 18 to 6 months in advance and we were largely booked for this season prior to the ferry problems becoming critical and receiving widespread publicity. We have had almost no enquiries, nor sales, during the last two months, and our late season (mid- Sept and October) for this year are currently looking very poor, and enquiries for 2024 have dried up.

Mainland podiatrist decided to stop coming to Mull due to reduced capacity on Craignure route plus poor reliability. This has a minor financial impact on [redacted] for loss of income from room rental. More seriously the

island now has no provision for podiatry so residents now have to travel to mainland , if the ferry runs. In many cases these are vulnerable elderly people some of whom have mental health problems which mean they won't travel on the ferry

As most of our guests are staying for a longer period the majority found ways of getting here though some had a long detour. Several short stays were either no shows or cancelled. One tour company with a series of lunch bookings for the season have now cancelled for this year and may not book again. This is probably more damaging than the directly quantifiable financial losses - the risk that people may decide it is too much effort to travel to the islands because of the disruption they have faced this year, or even having simply heard about the disruptions. We cannot quantify how many bookings have not been made due to the disruption.

I haven't had any impact on the number of guests arriving. All have come, although some have cut their stay short to travel on less busy days. There will be some who are less inclined to come again, although guests who have been coming for years are still re-booking for next year. I think they look at it as a one-off issue! Extra costs have been due to me not being able to get to Oban to shop for the business. So delivery charges and some higher prices.

Difficulty recruiting, impossible to plan jobs (work on and off mull) Tree supply even more unpredictable (affects continuity) Impossible to plan breaks away .

Unable to make site visits. Fortunately for zoom and teams this can be carried out on a preliminary basis with a view to visiting sites soon thereafter

Not able to get on and off island

People are cancelling their trips to Mull and Changing their destinations because of the great ferry debacle. We have had tour groups and others have their ferries cancelled 30 mins before sailing and no alternative ferries available that day and stand by full. Cancelled bookings for me. Half empty restaurant when we have been fully booked every open day in the last 12 years.

Just starting to get accommodation cancellations as people are concerned they either won't get here or more importantly for them won't be able to get off the island again. Going off island to shop for supplies is a nightmare with no guarantee even as a foot passenger the ferry you are booked on won't be cancelled or you get told it is cancelled then it sails anyway as happened last week leaving my husband with an unnecessary 2 hour wait in Oban.

I spent 1/2 an hour yesterday just chatting online with a customer who was wanting to cancel her booking for the following day due to her ferry being cancelled. I managed to convince her to book a later ferry in the day on the MV Isle of Mull. I believe that this was only possible because they were travelling as foot passengers. Given we are now at the beginning of June, my earnings are 40% below what they should be. So I need to hope that we have a mental next couple of months, or I need to consider whether our business is viable longer term. We are in Dervaig, so unlike tobermory we just do not have the footfall, we rely on holiday makers to supplement our local income (even if all dervaig residents spent money in our shop, it's such a small village it would still need bulked up by visitors).

We have had a lot of cancelation we also have weeks available with no bookings. It has also made guests reconsider coming back to mull

Our business is entirely speculative - no bookings, no deposits - we are totally dependent on footfall and the opportunity to convert that into sales. Looking to the future we are less likely to risk further investment into the business. Simply too vulnerable to external factors.

We have to date no cancellations. It is difficult to tell if some of our gaps would have had booking. In the medium term it has damaged Mull's reputation but that is again hard to quantify.

Forward bookings for July and August severely impacted. May, June was already booked before this nightmare, but could impact on returns for next year.

Refurb overran, extra delivery costs, delayed opening .. impossible to plan for an opening date when you don't know when materials will arrive, employed staff & paying wages & unable to trade ... serious financial impact

Late deliveries of materials are delaying many projects within the business, impacting this year's plan of works.

I'm an undertaker living in Mull but business operates on mainland. Obviously I need to be able to get off the island reliably and quickly to reach clients in need. Oban - Craignure is a real necessity for me but if I have to go other routes then I have to go. The extra time impedes client confidence and although there has been no immediate impact in business as I rely on word of mouth a negative review can set me back considerably as I'm really only a one man band.

Hugely significant damage to our footfall and sales right when we need it the most. Irreparable damage to trust in Mull as a destination. (Told to me first hand by visitors they will never come back to our islands, after shocking treatment by CalMac, and genuine fear they can not leave again when they need to) This is dismal, these visitors are taking home bad memories and will not encourage friends to visit us going forward. I have had to cancel all off-island services to the Oban area as I could no longer maintain a reliable service to customers. As a direct consequence of Calmac I have lost 30% of my trade, which mainland-based competitors have now acquired.

I have had issues with orders being delayed. Some suppliers now will not deliver to Mull as they can't guarantee delivery. Guests in holiday cottages have had sailings cancelled, which means in turn, they are cancelling their trips. There is then no need for a changeover, which is lost revenue for me as a housekeeper , and a knock on effect is that other businesses lose out due to their services etc arent utilised that week, by myself, or the guests.

Unhappy guests, regulares not booking again. Cancellations.

Guests have cancelled accommodation because Calmac had cancelled their ferries - the alternative ferry times offered didn't make the journey from South of England viable because of requiring to get across Mull to catch the Iona ferry. Other guests have cancelled because of the unreliability & uncertainty of the ferries & the additional challenge added to their journey with the Corran ferry disruption. Our business would usually benefit from attracting & offering last minute accommodation options, but the ferry situation has meant less people are looking to make last minute travel plans because recent ferry bookings were often first to be cancelled; whilst others stated they didn't want to risk travel to Mull/Iona with so much upheaval & uncertainty.

Difficult to put in place workable plans ,time frames for customers due to delayed deliveries of materials and uncertainty in travel bookings

Less visitors getting to our premises. Turnover is the same as last year only due to 2 days of high turnover. We have had performances threatened due to artists and technical staff being unable to get here on the planned ferry. Thankfully we have made it work, but on at least two occasions in April we have been on stand-by to cancel. One of our staff members was driving over with some art for an exhibition, and couldn't return to the vehicle to Oban via Craignure. She drove round via Lochaline/Fort William, stayed the night in Oban and then her ferry back the next day was cancelled which meant she missed the bus and had to sit in Craignure for a few hours. Two members of staff were due to visit Pitlochry Theatre, and the ferry booking was not moved over from the old to the new system, and so the visit was cancelled two days before. We are awaiting the refund for the tickets, and have made a claim for cancelled accomodation costs.

The ferry disruption and ensuing uncertainty has increased the existing financial pressure on my business caused by the pandemic, and caused me to question the viability of my business and consider the possibility of insolvency. We have experienced zero income days, with only a handful of visitors in the weeks from 1st April to 31st May. Normally, an exceptionally busy time.

As a tourism business the ferries have had a major impact on my business as I have had to cancel tours due to the unreliability of the ferry service. I run multiday tours on and off Mull and Iona and the ferry situation have made it impossible to run these tours.

People simply not booking accommodation due to ferry availability and reliability. First year we have availability in the calendar since before Covid

The feed back we are getting is that people won't come back to mull. We have had one old couple who where in there late 80s who had there ferry cancelled at 22:00 , leaving them to have a sleepless night, and we could not offer them a extra night. next customers are booked in and they had no trouble getting here and couldn't understand the problem other s are having. So we haven't had any one cancel, as we tell them to go round by fort Willam , when they get here tho they are really unhappy with how CalMac treated them. As I see it no care from management , and the poor staff taking all the abuse on the front line.

One couple cancelled their weeks stay due to not being able to get on or off the island at their booked times. Significant financial impact on my business due to delays in timing of operations and lost bookings Cancellations. Guests not booking in the first place.

As a letting agency, we have missed opportunities in the last month to be able to secure bookings for customers due to the ferries being fully booked, which has resulted in a loss of income for ourselves and owners. Some guests were unable to travel, as their booked sailings were cancelled 24 hours before they were due to arrive. But the main concern is the negative impact on the way visitors have felt about the viability of booking again, due to the experience they had of trying to book with Calmac in recent weeks (cancelled sailings/poor customer service/difficulty of booking online/negative press). There has been a loss of confidence in their ability to deliver a regular, consistent service which will definitely put some people off from coming to the island for the foreseeable future.

For the last 4 weeks my guests have cut short their stay with me when their return sailings have been cancelled. (combination of 5 nights). My bookings are very low for the rest of the summer where I am usually booked right through to the rally. I am concerned that the guests who had their holidays cut short will choose not to return.

late arrivals and even some that would cancel all together

Unable to get booked on Oban - Craignure or work delayed by 4 to 5 weeks when space is available. Customers unable to wait/jobs time sensitive.

I have had 2 parties cancel in full causing me to refund 50% of their booking costs as per booking.com T&C's. I have had 3 weeks worth of enquiries that have not booked specifically due to the ferry issue - they found it too stressful & uncertain and would dampen their holiday. I have had 2 parties leave early and/or arrive late and have left dissatisfied and stated that they won't be returning. The long term financial impact is going to be massive. The additional cost of fuel for the 100 mile detour is adding a significant additional financial pressure on the business as we have not found a changeover person, we are coming up weekly from Glasgow. The additional detour is adding a significant amount on to the already huge fuel & transport expense. It is getting to the point we are thinking the business is not viable due to the time, mental & physical stress of the ferries and the additional costs & losses associated. This is an absolute crisis for us.

There has been a significant impact due to loss of rooms revenue from guest cancellations which has also impacted our F&B and Spa revenue against what we had budgeted for this year. It has also impacted on our recruitment with some candidates unable to get over for interview due to the disruptions resulting in them having to pull out of the interview process which has then put more pressure on the team members we do have.

Even regular guests who have been coming for 16 years are not confident in booking next year. Although this years guests are suffering disruption they have got to the cottage. Either by longer journeys or by later

crossings. It's next year that I am concerned about. We at this time are usually well booked for next year but bookings for 2024 are down by more than 50%

It's not been financial but it's the inability to do anything spontaneous. You work round it as an island business but it's as if they own your movements. You rarely get the 2 ferries you want on a return. Booking as a foot passenger now just increases this feeling.

While we haven't actually lost trade due to the ferry disruption it has been much more difficult for guests to get here. Many saying the disruption will make them think twice about coming to Mull in the future. Following a downturn caused by COVID, our business lost two years of forecast growth. Now we face greater inflationary overheads for energy costs, mortgage payments and goods/services at around 25-30%. A loss or 10% on gross turnover is not a true reflection of financial loss. Customers report concerns and a lack of confidence in booking a return ticket which can leave them stranded on an outward or return journey. Sailing are cancelled with little or no notice. Media are reporting the problem across the country, undermining confidence in visiting Mull. Why risk losing deposits and more, if you can go elsewhere. We have seen a marked decrease in last minute or ad-hoc bookings, simply because visitors cannot be sure whether they can find a return sailing. We also get to field disgruntled arrivals who have been fobbed off with excuses why their ferry was cancelled or changed with little or no notice. We don't do PR for Calmac/CMAI management failings.

We have guests struggling to get to us. And those that are here, are constantly checking for updates to work out whether they need to cut their holiday short in order to get off the island. They love Mull, but the journey to and from has been too stressful for them and many are saying they will not be coming back.

Lack of day trippers has significantly reduced footfall and sales by 50%. Many visitors are saying they will never return due to the stress of getting here and no idea when or if they will get off the island.

Impossible to get ferry booking to do large shopping trips to mainland. People arriving very late due to cancellation on Oban Craignure route and having to make the huge detour. So far have only actually lost 1 booking but feel sure that we will begin to lose more as season progresses.

Forward booking confidence for island tourism has taken a dive: unquantifiable loss in future visitors
Lunch business has been disastrous for us as we have lost most of our passing trade due to lack of footfall. As we don't take reservations lunch we rely on passing trade

Visitor footfall main target for sales. At least half of sales are returning customers. Both have shown significant decrease in this year to date.

Cancellations, loss of day footfall and last minute room sales, no confidence going forward.

It's really difficult for me to quantify the bookings I haven't yet received because of this but I've got gaps this summer I'd never normally have by now

Loss of business through late deliveries, missed delivery times meaning customer had to go off island via fishnish to get parts from other suppliers.

I rely on passing trade, of which there's been less.

I receive almost daily phone calls from people cancelling as they are unable to get a ferry. My business largely relies on day trippers who have not been able to get to mull. I am currently running at a loss.

Bookings are being cancelled and bookings for next year have collapsed

We have seen a significant reduction in day visitors, and this obviously affects our takings. Were it not for the constant slew of cruise ships, we would be seeing a drastic downturn in sales.

The ferry problems had a significant impact on our club. For our main fundraising event we had teams cancel at the last moment and lost customers for our lunch

Late deliveries causing a re-schedule of work

All my supplies come by mail or carrier and about half of what I manufacture is sent out by mail. Royal Mail has its own issues getting deliveries to customers, but these are compounded by problems with ferries. If I don't get raw materials on time, I can't fulfill orders, customers needs aren't met and there is a risk that they cancel commissions.

Guests leave or arrive feeling stressed as they do not know if they can get on or off the island and if they have to go via Fort William massive time and costing above what they had budgeted for so all of this is negative to them re Mull.

Great dissatisfaction amongst guests and increased anxiety levels over whether ferries will actually run or will be cancelled at short notice. Problems associated with getting onto and off island, greatly exacerbated by failure of Corran ferry also.

The constant change of timetables confusing people. When they book and research their travel all is well yet when they arrive they learn that the times have all changed and the bus timetable has changed so they can no longer visit. Had complaints that we gave them false info when it was actually correct at the time but CalMac changed things.

Immediate impact is loss 24 lunch groups, some overnight stays, & some day trade for our shop, as well as 4 weeks without our main freezer working as engineers couldn't get booked on ferry. Much more worrying is the long term impact of day trippers not coming as a lot of them fall in love with the place & come back to stay, and the reputational damage of people having nightmare journeys up here, boats cancelled at the last minute, etc. Not sure how you quantify that.

I provide leadership consultancy retreats and 1-1 tuition from my home on Mull. There have been occasions when clients have had to delay their arrival to the island. I have had to change my T&C's to avoid responsibility for this. Due to the nature of my work and clients, this isn't generally an issue - and any impact on my business is purely hypothetical and can only be quantified as lost growth potential. My typical daily rate is £2,750 for new clients, I may have had clients not return due to transport difficulties, but I don't follow through too much on this because of a relatively full book.

Currently have 132 bookings for the full season, against a total number of bookings last year of 200. This equates to about £20,000 in reduced income - £7500 of that directly attributable to March, April and May so un-recoverable. This year April had 16 bookings against last year's 25. May had 33 bookings against 42 last year. Late availability cannot be sold as there are no tickets (with system being down and ferries in chaos) so rooms which would usually sell easily, lie empty.

We may have been lucky, but so far we've not had any cancellations, and our bookings are at a comfortable level.

We have been greatly impacted on two fronts. 1. We have struggled to secure the bookings required to get our live shellfish (mussels) to the markets in time, this has had a big impact on our customers. 2. Our shipping part of the business employ a lot of crew from Mull, moving these people back and forth to crew changes has been affected with extra accommodation etc.

An impact of late deliveries of stock or lack of visitors to the island at this time of year can have a £500/£800 difference in daily takings, I have taken on staff to cover the busy holiday season but I'm already having to lay them off due to not having enough work for them and not able to know if we are going to get the footfall, with increasing prices on stock means my prices are also having to go up which means more locals turn towards supermarkets like Aldi or Lidl which decreases even more the footfall I get. And after 3 years of covid

restrictions and then a very quiet tourist winter there was hope for this season to be the start of building finances back up yet still we are struggling just to cover the overheads because the tourists are not getting here. A prime example of this was music festival, the 2 boats (and one of them being the Isle of Mull) meant that people could get to the island and when they did they spent! I hoped this was a pre cursor to the season and hoped for good things when then in the next example the link span went down, compared to the same day last year, I was down by £600.

Our takings are down. Our costs are up. About 40% drop in numbers compared to this time last year, and the only factor I can put this down to is the lack of ferries/ disrupted service.

It is mainly delays in visiting clients on mainland and delayed postal services creating loss of goodwill, which is very difficult to ultimately value.

Reduced purchasing from businesses that buy my products due to their reduced footfall.

Running a manufacturing business on Mull is difficult enough, but the uncertainty, extra costs and pure hassle resulting from the mis-management of our ferry service is enough to wonder why and how we continue to do it.

Q: Use this space to succinctly describe the impact on you or those around you on a personal level.

Concern that the tourist footfall will be so reduced that we will be unable to recoup losses before end of season, customers of mine experiencing the same.

Stress due to the disbelief that CMAL, CalMac and the Scottish Government can be so dismissive of peoples livelihoods and well-being. It feels like corrupt backhanders and an ill-judged investment plan in ferry infrastructure take precedence over everything else.

Our costs had already gone up (thanks Rishi!) and to have this on top is adding huge stress and anxiety.

Staff are not sure if they're going to be able to keep their jobs due to loss in takings, this is not only a now impact but if I do not make the money through the tourist season then I can't take them in to the winter, then I have a fear of not having enough staff as I'll lose them to full time all year round work (which if the season ran right should not be an issue) this then puts stress on the workers I do have as they are having to cover those hours, they complain when they are not getting enough hours as again they make their money through the summer too, due to hours lessening in the winter, and they are starting to worry they won't be able to do they are worried about cost of living in the future months on a lower wage. I see one of my team in anxious because her dad is struggling to get off for cancer treatment as they keep either cancelling their sailing or the boats just are not running, and I am currently in the middle of IVF and panic that on something time sensitive that even if I have a booking for the ferry to get to an appointment I do not know if it's going to be cancelled and then this has a huge impact on treatment and my mental health in a time I'm trying not to be so stressed

The impact to our business long term is still not clear. It has dramatically effected life on Mull this year and I am not surprised to hear of people reconsidering leaving Mull for this reason.

It's been slightly stressful. I had to make a booking at only a few days' notice to go off for a hospital appointment in Glasgow (car essential). I might have got a priority booking to go off, but it was unclear when I could get back. But it all went OK in the event. The Oban port staff were very helpful, and in fact I was squeezed onto a sailing four hours before my return booking.

Increased hours providing assistance to guests with travel plans and providing lots of reassurance that Mull is open which adds to workload. Extra hours doing analysis to prove that our business has suffered because of the recent chaos. This on top of the stress, workload and additional cost (estimated at £2000) to get all the paperwork done for our Short Term Let licence which is required this year to allow us to continue trading. Fun indeed!

I have had issues getting off the island for personal reasons. I have cancelled trips and missed events because of cancelled services (typically impacted during times of reduced service). Whilst I do have some sympathy with the realities of living on an Island, the Oban->Craignure route is by any sensible definition an Inshore voyage. Most cancellations are driven by old vessels and other mechanical breakdowns.

All of the things you mention in the question, and not just for me but for all of the staff as well Extended work hours as people's CalMac bookings being cancelled in the evening so they are contacting tour companies late in the evening.

Guests arriving very late, outside normal check in times disrupting personal 'downtime' and disturbing other guests

Stress and anxiety through the roof as I never know when guests are arriving or if guests who are here can get off the island, also trades people now have said they cannot afford to trade on Mull as men are sitting in standby lanes for hours. In the ten years I have been on the island I have never known it as bad as this. We have weather Corvid been hit with the energy hike and now this!!!!

Huge stress and anxiety trying to do something as simple as book a ticket on a ferry - not to mention being unable to trust the booking once it's made.

Unknown delays caused extra stress and anxiety.

Our main fund raising event takes a considerable amount of organisation. This is voluntary effort. Having ferry insecurity caused anxiety and additional effort to compensate for loss

There is a lot of stress and anxiety caused by struggling to get to the mainland for appointments (hospital, dentist etc). The constant disruptions to the mail has also been hard on folk as we are so reliant on ordering things online in our remote location.

It's not so much the financial aspect, as the fact that I can't physically buy the raw materials I need on the island in the quantities I need. I'm nervous to book the boat in case it's cancelled, or worse, I get over and can't get home. With a business and children I simply can't risk getting stranded, so am often at a loss regarding what to do. It makes me wonder if working and living on the island is sustainable at all.

Lost medical appointment, anxiety..

As a husband & wife team who run a small restaurant, we are already strained with rising costs and overheads. Combine this with the loss of revenue and it is very anxious times for us both personally & professionally Stress wondering whether bookings for next year will be much lower because the ferry issues are now being broadcast on UK wide TV.

Significant negative impact to accommodation business and also personal stress of ability to get on/off the island. Additionally, as a wildlife guide for a company bringing groups to Mull, huge stress / impact / inconvenience trying to rearrange travel & accommodation and reassure guests who may be discouraged from returning in future.

Difficulty getting bookings even as a foot passenger. Have twice travelled Lochaline and around the Loch due to being unable to get on Craignure to Oban ferry with a vehicle. Guests have had long standing bookings cancelled with very little notice.

Its been really stressful not know if ferries are running to make hospital appointments and know I can get back home again. Deliveries have been impacted and taking longer to reach Mull.

The long term impact of the current chaos of the ferries is a real unknown. The ferries are now so old, we have no confidence that they will be in working order. If ferries were working you could at least know there would be a ferry there to fulfil the route and bookings. Introducing a new booking system in the middle of the tourist season was ridiculous. The old system worked and no-one was asking for this to be changed. Why not wait until the winter, before the summer timetable was released, when there would be less bookings and less people trying to travel and make bookings. Cancelling ALL bookings on a Saturday!! The main changeover day for visitors. Crazy. There is also so much negative social media about the situation people are chosing not to plan holidays or visits to Mull.

Our concern is whether we have enough money to make it through the winter months. Any plans and reinvestment for the business are now deferred until the ferry fiasco is resolved. Our business confidence is low. With the slippage in replacement vessels, our concern is that the planned replacement date for MV Isle of Mull will slip also leaving a tired unreliable (safe??) boat in service for Mull. Business confidence will be an issue for many years now. From a working perspective, we receive some tired and unhappy guests who have been advised to use the Lochaline service. It is not a viable route now around Loch Linhe. We are seeing an increase in late check ins. This can make the working day longer serving breakfast through to waiting or guests arriving and trying to placate them and keep the noise down for others in bed. We have had several occasions where ferries have been changed and cancelled with no notice. For medical and dental appointments it is bad enough, but it adds stress to a simple shopping trip or family visit. We have a son in school and spend a lot of time checking if the ferry and bus are working and join up. The bus service must be pulling their hair out trying to change schedules and find drivers for the changes made to the ferry service. But it is beyond funny now. Whilst following the complaints and pressure to improve the situation to something reliable and usable; we are coming around to the fact that this is a breach of public policy. If the government and layers of ship management simply ignore the concerns and protest, then perhaps a legal class action by effected business will bring additional media pressure and a real risk those responsible could be liable for their incompetent management of a lifeline service and their obligations under the Islands Act 2018.

On a personal level we have missed dental appointments, had to change/cancel planned visits off island due to both Calmac and Highland Council. Spent hours trying to arrange alternative routes for guests, fielding questions from worried guests. People have had ferries cancelled late at night which have been booked for months when they were due to travel the next day. Overall the stress and anxiety has been difficult to deal with and the worry that this might impact business on future years is also a concern.

There have been so many occasions where it has been inconvenient. It is incredible what we put up with and have normalised now. I'm just fortunate in that when it comes to my actual product, a third party haulier takes my stuff away and he's an old hand.

High level of stress at changeover dates. Customers having to leave the cottage but their booked ferry home cancelled With the dreadful burden of the licensing scheme. Which is still not awarded and the threat of tourist tax. The enormous hike in energy bills insurance and maintenance our income is uncertain therefore stress of an enduring nature is bringing high levels of anxiety to myself my husband and our family. We are taking steps to reduce our expenditure on maintaining the very highest standards of decor fittings and equipment. Our housekeeper receives less work as we do as much as possible ourselves Extending our working lives. If next year income is as bad as we forecast we will certainly look at closing.

We were hopeful this year would have been a successful one with more opportunity to increase revenue against last year due to this being the first year without Covid restrictions. This has caused a great amount of stress and anxiety for all of us in the business trying to work out how we are going to recoup our significant losses. It has also impacted our recruitment process with some candidates unable to get over for interview due to the disruptions resulting in them having to pull out of the interview process which has then put more pressure on the existing team members having to work longer hours which in turn affects their mental and physical health.

It is massive. We are having to leave our home at 3am instead of 6/7 to get to Iona with enough time to clean the house between guests. The stress of finances is HUGE and putting a massive strain on the family. I am recovering from chemotherapy treatment as well, so it is having a negative impact on my health. The state of the road around Loch Eil has caused damage to my car costing £900 to fix or risk not being able to get to the business and collect guests safely. Personal inconvenience - guests have missed the connecting bus because their ferries have been cancelled or disrupted meaning we have had to drive back to Craignure to collect guests for free. Getting workmen to the house to do essential maintenance and work for the short term licence is

proving impossible. It's just an untenable situation. I would like to be involved in anyway that I can to lobby or take further action.

Having to pass on additional costs to island customers due to wasted time on island waiting to get back as not able to get booked on at convenient times.

personal inconvenience in trying to relay up to date information about how to get to mull considering the ever changing times bookings and ability to get to a ferry

I have incurred a lot of extra costs this year due to the licensing scheme and currently cancelled and reduced bookings has caused me great concerns about the viability of my business. Our accommodation is an annex of my house, not suitable for long term let so we are currently looking at the options selling our home and business.

From a business and personal point of view, the impact of the poor reliability and reduced service/capacity of the boats, has had a significant impact. It has been a stressful time at work managing the disappointment of guests/owners who had cancelled bookings and also for friends with businesses on the island, noticing the drop in visitor numbers and the impact on their income as a result. We personally know people running boat tours, wildlife tours, cafes and restaurants who have all suffered a loss of income as a direct result. It's incredibly frustrating as an islander too, to not be able to leave Mull when we need to for shopping, appointments (particularly health related) and leisure etc.

Worry about loss of income/ability to pay workers.

The lack of a reliable ferry service has caused significant stress due to not being able to book ferries or travel when required.

Increased stress to me and my customers as room bookings could not be allied with ferry availability. Increased time and travel costs for me trying to get to the mainland for social events, health appointments and shopping.

I also have a handyman business, we are always struggling to get things delivered, some of this is the royal mail to. But some days you wonder is the stress worth it, customers who don't live on the island don't understand. We fill this survey in but until CalMac are taken to task about there inability to meet there contract nothing will change.

Financial stress as I also work zero hours contract for retail outlet and hours have been less than previous year by some amount

After surviving the pandemic, this last thing needed. I have an international client base and it is sending an extremely negative message and not encouraging international visitors back to the islands. It is certainly the opposite of the message Visit Scotland has been actively trying to encourage our international visitors back as we all try to recover confidence after the pandemic. This was the first year post pandemic some of my clients were coming back I am not sure they will come again, who wants a chaotic disrupted expensive holiday.

The period from March - June has, personally, been very difficult and stressful as I have had to consider the consequences of my business failing to bring in the income needed for it to remain viable.

There is a great deal of time spent supporting visiting artists and performers who are having difficulty arranging transport to/from here. Previously we would just send a link to CalMac saying "book your travel as soon as possible" but now there is a need to help them find alternative travel, accomodation and even to make

changes to their work here to fit around when they can travel. It is taking up extra time for our staff as well as visiting companies, and is causing anxiety for all those involved.

Very stressful not knowing whether you will be able to travel. And then when there's been a breakdown we then incurred additional costs.

Extending working hours, unable to travel in a timely fashion, unable to keep appointments leading to unhappy customers. Stress caused due to business and personal concerns caused by inability to travel.

The situation causes a lot of worry, stress & anxiety: bearing the responsibility to ensure the business is financially sound & stable is severely tested with the ferry situation. The worry is evidenced in longer working hours & a lot of disrupted sleep.

Even with the medical protocol, issues for those transporting 'patients' to mainland getting themselves & vehicles back to look after dependents. Having to leave a vehicle in Oban Tesco for periods of time.

Following recent years of covid restrictions this was our first normal year. It's very worrying to think how the future of our accommodation will survive with ongoing ferry issues.

After years of building a business and hard-earned good reputation, the stress and distress of seeing so much of it being taken away by the failings of Calmac is shattering. Every day I would have to reschedule multiple appointments, let customers down and feel like I had failed. I have regularly been having anxiety and panic attacks, all caused by the consequences of ferry disruption and negative impact on my business.

I suffer anxiety. This is not helping. We work very hard to make a success of our business, it's a mindmelter when forces outside your control make your job even harder like this. Get it together CalMac!

The lack of a reliable service means that I now travel with a blow up mattress and sleeping bag for fear that I can't get home. This has been a real fear in the last few months. During the tourist season trying to get to A- B is more challenging anyway, but if having to factor in cancelled ferries and extra road miles the stress incurred is tenfold. There is no priority given to islanders which seems mad as the ferries are a real lifeline service for us islanders. It really is essential for me to have a reliable service - weather cancellations are one thing and can't be helped but ferry breakdowns and late cancellations are an intrinsic consequence of ferries that are past their sell by date. Priority transport needs to be given to islanders.

Lots of stress and anxiety from tourism customer who don't know how / when they are going to get to Mull and off Mull because they've received abrupt, uninformative, last-minute messages from Calmac with no support. We've been providing the support by giving advice, alternatives, trying to phone etc. There are also problems with staff getting on and off and back to work on time.

Sheer uncertainty & inability to plan an opening date combined with financial impact of delays has resulted in high stress levels, sleepless nights and increased working hours just to stand still let alone make progress

Quality of life severely affected, which has a knock on to work life. Stress, feeling cut off, unable to plan ahead. More anxiety, problems getting to hospital appointments earlier in the year. Daughter coming to visit in 2 weeks which makes us anxious .

As you would expect, considerable stress and anxiety on a business level as well as frustration, inconvenience and disruption on a personal level.

It is causing added stress on top of the licence for holiday let's are people going to come next year will my business be viable

STRESS because we need to pay our mortgage, and living costs are already higher. I'm already looking at other jobs, but the more we detract from our business the weaker it becomes. The reality is we will need to re think the longer term viability of our business if Calmac can't sort this out.

I feel people are holding off from booking holidays on Mull until they get back confidence in the ferries. I personally worry that I am going to survive in the winter, if I don't get enough income during the summer season.

Cancelled work hours negatively effects staff moral and money issues. Loss of atmosphere in dining room when we have only half the tables filled. Cancelled deliveries cause stress and a last minute scramble to try and find replacement items or change menu/

Personal inconvenience, extended working hours

Very stressful trying to arrange a simple thing as booking a ferry. Extended travel hours and incurring travel costs.

Total stress of never knowing if a planned itinerary is possible/impossible/ extremely stressful due to hours of extra driving (no corran ferry, impossible to get off Oban) 4am starts etc etc

A bit of extra frustration. Guilt at adding to the postal service when they were stretched to their limit already.

Considerable extra time and effort has been spent communicating with and advising guests about changes of timetables, alternative routes on and off Mull (also taking into account the absence of the Corran ferry) both in advance of their arrival with us and then assisting them with planning their journeys to and from the island. This has included some guests cancelling a night of their stay to allow for the extra travel time or where public transport connections have not been maintained, as well as working to arrange private boat charters from Mull to Iona where disruption has meant not making it to Fionnphort in time for the final crossing to Iona

The ferry situation has caused great stress and inconvenience. I am spending a great deal of time trying to help customers organise alternative travel plans and to get accurate updated information on what is actually happening. Likewise, dealing with paying guests who are having their trip cut short by ferry cancellation is very stressful. I have made two trips off island to Glasgow in the last two weeks. In both cases my return ferry was cancelled and I was instructed to return via Lochaline. I was unable to procure any business supplies as I'd planned to do in Oban, having instead to make the long run around to Lochaline, and not having enough time to stop in Fortwilliam. This was a hugely frustrating, inefficient, and uneconomic waste of time and money.

The disruption to the ferry service has certainly caused stress on a personal level. Particularly having to reassure guests or encourage them not to cancel their trip. I have spent hours poring over maps with worried guests when they discover at the last minute that they will have to drive right around loch linnhe on busy single track roads before beginning a long journey south to get home. We have provided lifts to guests from Fionnphort to Craignure when ferries linking with trains have been cancelled and the bus service is too limited. This has been at our own time and expense in the hope that loyal return customers won't be dissuaded from visiting next year. Guests have found communications from Calmac in cancelling their bookings particularly upsetting. In the absence of anyone at Calmac to speak to of their distress and disappointment, I have very much acted as a sounding board.

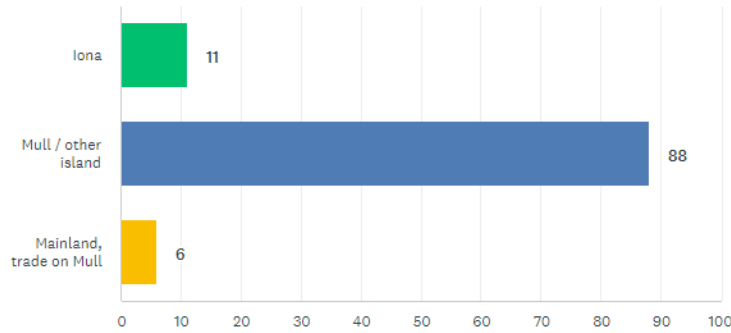
Stress of not being able to get across to Oban for hospital/dental appointments, worrying about getting home if we did, extended mileage due to detours, and the loss of our business.

The stress put on our staff is considerable, particularly in relation to the ticketing system as it is totally failing, we have to send office staff down to the CalMac office everyday to try and sort out bookings, make changes, etc? Also our mainland based staff who are working on Mull have become paranoid about getting back off which causes distress, distraction and stress!

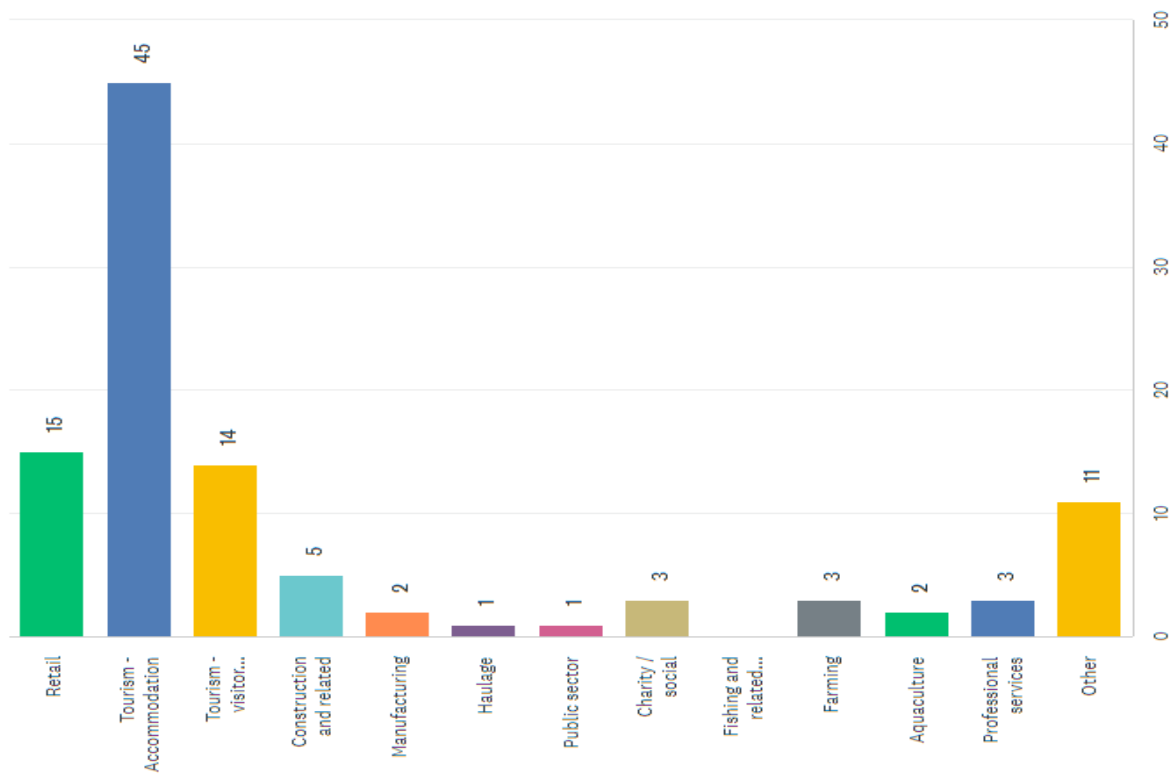
Annexe

Three questions were asked about the location, size and sector of each respondents' business.

Q: Where is your business based?



Q: What is your main business activity?



Q: How many people are employed in / earn a living from your business?

	All businesses	Mull & Iona based businesses
Average number of employees	9	9
Largest single employer	180	180
Total employed by all surveyed	985	950