

**Edinburgh and South East Scotland
Cruise Passenger Management Plan
Final Report
March 2025**

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1. Executive Summary

Cruise tourism in Edinburgh and South-East Scotland has grown substantially in recent years, generating economic benefits while introducing operational and sustainability challenges. The development of a Regional Cruise Passenger Management Plan will enable a strategic and collaborative approach to managing cruise visitors effectively. This initiative is not focused on increasing capacity by attracting additional cruise ships but rather on ensuring a responsible and structured approach to managing existing visitor numbers. The region is in a favourable position compared to other areas, having already undertaken strategic planning to enhance the visitor experience, ensure infrastructure suitability, and safeguard local community interests to maximise the benefits of cruise arrivals.

The plan aims to optimise the economic, cultural, and environmental impact of cruise tourism while aligning with key regional tourism and economic development strategies. By integrating with existing policies, the initiative will ensure that cruise tourism contributes positively to the region's economy, environment, and communities. This proactive approach is recognised as a key consideration in the City of Edinburgh Council's (CEC) report to the Policy & Sustainability Committee. However, further investment is essential to sustain positive outcomes for visitors, local communities, and businesses while maintaining a responsible and sustainable approach to visitor management.

The region's five key cruise ports—Leith, Rosyth, Newhaven, South Queensferry, and Eyemouth—offer diverse experiences for passengers, handling both transit and turnaround visitors. These ports provide strategic access to Scotland's renowned attractions, from Edinburgh's historic sites to the scenic landscapes of the Lothians, Fife, and the Borders. The global cruise industry has rebounded strongly post-pandemic, with Scotland seeing record-breaking numbers of ship calls and passengers. While this growth presents economic opportunities, it also underscores the importance of balancing tourism development with environmental sustainability and community well-being.

1.1 Market Overview

The global cruise industry has recovered post-pandemic, with record passenger numbers projected to continue growing. Scotland's cruise sector is experiencing similar expansion, with nearly 900 ship calls recorded in 2019 and continued strong demand with 1,016 calls and 891,584 passengers to Scotland in 2024. Managing this growth sustainably requires strategic planning to balance economic benefits with environmental and community considerations.

1.2 Policy Context

Cruise tourism in the River Forth operates within a structured policy and regulatory framework that ensures environmental sustainability, safety, and economic alignment with regional and national objectives. These policies govern port operations, emissions reduction, and visitor management while guiding the strategic development of tourism infrastructure. Key policies shaping cruise tourism include:

- **Regulatory Framework:** Port Marine Safety Code (2016), International Maritime Organisation (IMO) standards, and International Ship and Port Facility Security (ISPS) Code.
- **Sustainability Commitments:** The Climate Change Act 2008, Scotland's Net-Zero 2030 strategy, and the Blue Economy Vision for Scotland, which emphasise reducing emissions and promoting environmentally responsible tourism.
- **Regional Tourism Strategies:** The cruise sector plays a supporting role in regional tourism strategies, integrating with Edinburgh's cultural tourism, Fife's coastal and golf attractions, and the South of Scotland's focus on responsible and sustainable tourism.

While cruise tourism contributes significantly to the visitor economy, it remains underrepresented in regional tourism strategies, lacking dedicated marketing, infrastructure planning, and policy coordination. Attracting high-value cruise operators—such as boutique, luxury, and expedition lines—aligns with sustainability goals by maximising economic benefits while minimising environmental and community impact. To fully leverage cruise tourism's potential, greater integration into regional tourism strategies, infrastructure planning, and sustainability initiatives is needed.

1.3 Key Findings

- **Economic Impact:** In 2024, cruise tourism contributed an estimated £11M-£14M in direct passenger and crew spending. The sector supports 463 full-time equivalent (FTE) jobs and generates £25.1M in Gross Value Added (GVA) and £125.40 net minimum income per passenger, reflecting its significance to the regional economy.
- **Community & Cultural Benefits:** Cruise tourism enhances cultural exchange and economic activity by connecting visitors with local businesses, heritage sites, and artisan markets. Initiatives such as the Cruise Forth volunteer programme play a vital role in shaping positive visitor experiences.
- **Environmental Considerations:** Sustainable tourism measures are necessary to mitigate the environmental impact of increased cruise activity. Priorities include emissions reduction through shore power infrastructure at Leith, the promotion of eco-friendly shore excursions, and visitor flow management to protect fragile sites.
- **Visitor Dispersal & Regional Readiness:** Edinburgh's historic centre faces significant pressure from high visitor concentrations. Strategic investment in transport infrastructure, marketing campaigns, and regional tourism development is needed to encourage dispersal to alternative destinations such as Midlothian, Falkirk, East Lothian, and the Scottish Borders.
- **Cruise Tourism Destination Readiness:** The preparedness of different areas within South-East Scotland to accommodate cruise tourism varies significantly. While Edinburgh, St Andrews, and Dunfermline are well-equipped to handle cruise passengers, regions such as Falkirk, Stirling, and Perth require further investment in transport connectivity and tourism infrastructure. Other areas, including the Scottish Borders and Midlothian, possess untapped potential but need targeted development to improve visitor facilities and business engagement.
- **Capacity Management:** The cruise sector's expansion requires enhancements to port infrastructure, passenger facilities, and transport connectivity to maintain a high-quality visitor experience while preventing congestion at key sites.

1.4 Strategic Recommendations

1. **Infrastructure Investment:** Strengthening port facilities, improving wayfinding, and enhancing transport links to facilitate smooth passenger movement and reduce congestion.
2. **Cruise Forth Development:** Expanding organisational capacity, securing long-term funding, and fostering deeper collaboration with stakeholders to enhance operations and visitor engagement.
3. **Sustainable & Responsible Growth:** Implementing green port initiatives such as shore power, promoting low-carbon tourism experiences, and encouraging cruise operators to integrate sustainable business practices.
4. **Enhancing Visitor Experience:** Developing cultural welcome initiatives, improving digital engagement, and investing in accessibility improvements at key locations.
5. **Managing Visitor Flow:** Coordinating ship arrivals and departures to prevent peak-hour congestion, enhancing regional transport connections, and promoting off-peak tourism opportunities.
6. **Data-Driven Innovation:** Leveraging real-time analytics for visitor management, forecasting demand patterns, and implementing crisis preparedness strategies.
7. **Visitor Levy:** Introducing a per-passenger levy to generate sustainable funding for infrastructure improvements, environmental initiatives, and community-led tourism projects.

1.5 Next Steps

To ensure the continued success and sustainability of cruise tourism in Edinburgh and South-East Scotland, the following key actions will be prioritised:

1. Establish Governance and Collaboration Structures (0-3 months): Form a Cruise Tourism Working Group to coordinate stakeholders, define roles, and develop an integrated approach to visitor management and investment.
2. Improve Visitor Dispersal and Experience (3-12 months): Strengthen transport links, develop digital visitor tools, expand shore excursion partnerships, and pilot new regional tourism initiatives to distribute visitor spending beyond Edinburgh.
3. Strengthen Business and Community Engagement (6-18 months): Launch a Travel Trade Ready Programme, organise workshops for local businesses, and foster community engagement to ensure sustainable and inclusive growth.
4. Develop Cruise Forth's Role (6-24 months): Secure long-term funding, expand operational capacity, and establish a central information hub to enhance visitor support and coordination.
5. Infrastructure Planning and Development (12-36 months): Secure investment for port facility improvements, implement phased upgrades to key cruise terminals, and integrate sustainability measures such as shore power infrastructure.
6. Implement Data-Driven Monitoring and Continuous Improvement (Ongoing): Establish visitor monitoring systems, introduce passenger feedback mechanisms, and assess the economic and social impact of cruise tourism to inform policy decisions.
7. Expand Business Engagement and Industry Collaboration (Ongoing): Facilitate networking opportunities, develop marketing partnerships with cruise lines, and encourage local businesses to adopt cruise-friendly services.

1.6 Conclusion

Cruise tourism presents a significant economic, cultural, and environmental opportunity for Edinburgh and South-East Scotland. While the sector has seen rapid growth, a balanced, strategic approach is necessary to ensure that it continues to provide long-term benefits without compromising community well-being or environmental sustainability.

The economic benefits of cruise tourism are substantial, contributing millions to local businesses, supporting jobs, and boosting Scotland's tourism industry. However, to maximise these benefits, it is essential to ensure that visitor spending is distributed beyond Edinburgh, supporting regional attractions and businesses throughout South-East Scotland. Investment in infrastructure, improved transport links, and business readiness initiatives will help achieve this goal.

Sustainability and responsible tourism management are central to ensuring that cruise tourism does not place undue pressure on Edinburgh's historic centre or local communities. Measures such as visitor dispersal, sustainable transport solutions, shore power adoption, and eco-friendly excursions will be key to achieving this balance. The introduction of a visitor levy could also provide dedicated funding to reinvest in sustainable tourism initiatives and infrastructure improvements.

Effective capacity management is another critical component. With cruise visitor numbers continuing to grow, managing arrival schedules, reducing peak congestion, and ensuring efficient transport and excursion logistics will be vital in maintaining a high-quality visitor experience.

Additionally, leveraging data and technology will allow stakeholders to monitor visitor patterns, predict demand, and enhance crisis preparedness. Real-time analytics and digital engagement tools will enable more efficient operations, helping to manage passenger flows and improve the overall cruise experience.

By adopting these strategies, Edinburgh and South-East Scotland can establish the region as a world-class, sustainable cruise destination that offers high-value experiences to visitors while ensuring long-term benefits for local businesses and communities. The region is well-positioned to lead the way in innovative, sustainable, and inclusive cruise tourism that prioritises economic growth, cultural preservation, and environmental responsibility.

Continued investment in infrastructure, sustainability initiatives, and visitor management will be essential to ensuring long-term success and maximising the benefits for local communities and businesses.

2. Introduction

This is the final report for the Client Project Group to review. It presents the key findings, analysis, and recommendations from the initial phase of work conducted between August and November 2024. The report provides a comprehensive assessment of cruise tourism in Edinburgh and South East Scotland, highlighting opportunities, challenges, and strategic considerations to inform future planning and decision-making. It examines the economic impact of cruise visitors, the region's capacity to accommodate growing demand, and the balance between tourism growth and sustainability. These insights will support the development of a strategic approach to maximize the benefits of cruise tourism while addressing key stakeholder concerns.

2.1 Background

Cruise Ship passenger numbers to Edinburgh and South-East Scotland have grown substantially in recent years. The region is accessible via five ports; Leith and Rosyth (both berthing ports), as well as Newhaven and South Queensferry and Eyemouth (anchorage points). Rosyth, Newhaven and Leith are operated by Forth Ports Ltd, Hawes Pier, South Queensferry passenger arrival is managed by the City of Edinburgh Council (CEC) and Eyemouth Harbour is operated by Eyemouth Harbour Trust.

All five ports handles both transit passengers (who visit the destination on a stopover) and Leith and Rosyth provide a turnaround service (for passengers who use the ports to either start or finish their cruise).

Edinburgh & South East Scotland Visitor Economy Partners¹ have appointed BTS, GLIC and Jump Research to develop and deliver a Regional Cruise Passenger Management Plan. The aim of the plan is to understand how to maximise the benefits of cruise tourism for the region, ensuring that the influx of cruise passengers contributes positively to the region's economy, environment, culture and local communities. The plan will be closely aligned to and effectively integrate with the key existing tourism and economic development strategies across Edinburgh and the South-East of Scotland.

2.2 Purpose of the Regional Cruise Passenger Management Plan

The development of a Regional Cruise Passenger Management Plan will allow for a strategic and collaborative approach to better manage cruise passengers in the destination. This initiative is not aimed at increasing capacity by attracting additional cruise ships to the region but rather at ensuring a responsible approach to managing the existing visitors. This strategy will enhance the visitor experience, ensure infrastructure suitability, and safeguard local community interests to maximise the benefits of cruise arrivals.

2.3 Approach and Methodology

Project Scope

The project encompasses a comprehensive analysis of the current cruise tourism landscape, stakeholder engagement, strategy development, implementation planning, and evaluation. It involves a collaborative approach with key stakeholders and local communities to ensure buy-in and ownership of the final plan.

This phase of the project was developed using the following approach:

I. Market Review of Cruise Tourism to the region:

- Assess the current state of cruise tourism in Edinburgh and the South-East: Analyse existing data, identify strengths, weaknesses, opportunities, and threats (SWOT analysis) to understand the current landscape including site visits to the 5 ports covered by the plan: Leith, Newhaven, South Queensferry, Rosyth and Eyemouth.
- Evaluation of the current Transport provision to each port and where there are gaps in the offering and the challenges for each of the ports in managing transport provision.

II. Competitor Benchmarking:

- Benchmark the Region's Cruise Tourism proposition against a set of comparable North Europe Cruise destinations.

¹ Partners:- City of Edinburgh Council; VisitScotland Scottish Borders Council; Fife Council, Midlothian Council; East Lothian Council, West Lothian Council

III. Consultations – Key Stakeholders and Industry Engagement :

- A programme of consultations drawn from the Public, Private and Community/Voluntary sectors, including representatives from local business representative groups.
- On-Line Survey to gather business perspectives on the key issues and opportunities from Edinburgh as a cruise destination. Survey report detailed in The Evidence Based Report 19.15.
- Shipping Agent and Shore Excursion Agents consultations to identify their perception of Edinburgh and surrounding areas as a Cruise destination and the opportunities and challenges to improve the visitor experience.
- Attendance at the Scotland’s Cruise Conference 21st November 2024
- Attendance at the Cruise Forth Summit 28th January 2025

IV. Market and Policy Context Review

- Collating research and consultation insights in the current cruise market (including trends, passenger demographics, and best practice) in the Edinburgh and South East Scotland region and undertaking evaluation of the region’s capacity to handle cruise visitors through:
 - Passenger and Crew Survey
 - Economic Impact Analysis
 - Community Impact Assessment
 - Crisis Management Evaluation
 - Cruise Ship Visitor Levy and its potential impacts

2.4 Definitions, Acronyms and References

Cruise tourism is a segment of the travel and leisure industry that involves voyages on cruise ships, where the ship itself serves as both transportation and a destination. Passengers enjoy onboard amenities and entertainment while traveling to multiple ports, often in diverse geographic regions.

Cruise tourism is a highly complex and varied industry that integrates multiple sectors, including hospitality, maritime operations, logistics, and destination management. The Evidence Based Report provides a summary of the key players, definitions, cruise ship operators etc.

2.5 Key Findings, Recommendations and Conclusions

Section 17 of the report outlines the key findings, strategic recommendations to address the challenges and opportunities of cruise tourism in Edinburgh and South East Scotland, and the overall conclusions.

2.6 Evidence Base Report

A separate Evidence Base Document serves as a comprehensive resource compiling the research, data, and insights that underpin the findings and recommendations of the main report on cruise tourism in Edinburgh and the South East Scotland region. It provides detailed supporting evidence, including economic impact assessments, cruise passenger data, stakeholder consultations, case studies, and policy analysis, ensuring a robust foundation for informed decision-making

3. Market Overview, Analysis and Policy Context

This Chapter evaluates the Cruise Tourism Market at a Global, European and Scottish level and the regulatory framework governing cruise tourism in the region, this also includes examining the rules, regulations, and policies affecting cruise tourism.

3.1 Global Cruise Tourism

The global cruise industry has shown remarkable resilience and growth, surpassing pre-pandemic levels and achieving record highs in passenger volume, economic impact, and innovation.

- **Passenger Growth:** In 2023, cruise passenger numbers reached 31.7 million, a 7% increase over 2019, with projections for 2024 expecting 35.7 million passengers.
- **Economic Contribution:** The sector generated \$138 billion in total economic impact in 2023, supporting 1.2 million jobs globally and \$43 billion in wages.
- **Fleet Expansion:** With 454 cruise ships operating in 2023, the industry is growing through 57 new ship orders between 2023 and 2028. Approximately 60% of these ships will utilize LNG, reflecting a commitment to sustainability.
- **Technological Advancements:** Modern cruise ships feature eco-friendly systems, flexible designs for multigenerational travel, and digital tracking technologies to enhance passenger experiences and optimize operations.
- **Sustainability Efforts:** The industry aims for net-zero emissions by 2050, prioritizing alternative fuels like LNG, advanced waste management, and energy-efficient technologies, including hybrid and electric vessels.
- **Demographic Shifts:** Millennials and Generation Z now represent 36% of global cruise passengers, reducing the average passenger age to 46. This younger demographic values affordable, tech-friendly, and engaging travel experiences.

These trends underscore the cruise industry's dynamic recovery, its focus on sustainability, and its ability to adapt to changing passenger preferences, positioning itself for sustained growth and innovation. The Evidence Based Report provides more detailed information.

3.2 Cruise Tourism Europe

The cruise market continued its growth trajectory in 2023. Europe as a source market produced 8.2m passengers in 2023, a 6.5% increase from 2019's 7.7m. The largest source market within Europe was Germany with 2.5m passengers, or about 31% of the European total. UK & Ireland occupied 2nd place with about 28% share of European source passengers, at 2.28m. Italy rounded out the top three with 1.18m pax or about 14% of Europe's source passengers.

The primary destination to which Europeans sailed was the Mediterranean with 3.75m. This is up from 2019's 3.24m, an increase of almost 16%. This is followed by Northern Europe destinations, accounting for about 1.9m pax, up from 1.4m in 2019.

3.3 Scotland's Cruise Tourism

Scotland's cruise tourism sector has experienced significant growth, establishing the country as a premier destination for cruise travellers. In 2019, Scotland welcomed nearly 900 cruise ship calls, bringing over 800,000 passengers². There were 1,016 calls and 891,584 passengers to Scotland in 2024³. The developments in port infrastructure and the variety of cruise offerings suggest that Scotland's cruise tourism industry is on a path of recovery and growth.

Balancing the economic advantages with community and environmental considerations remains a priority for sustainable development in this sector.

² Source: Ekosgen Cruise Tourism in Scotland 2020

³ Data from 2 ports still to be provided

Key Ports and Destinations⁴

Scotland has a variety of ports that cater to cruise ships of all sizes, offering passengers access to the nation's rich history, culture, and natural beauty. The key ports⁵ include:

- **Edinburgh (Leith, Newhaven, Rosyth, South Queensferry):** Serving as gateways to Scotland's capital, Dunfermline, Fife and Central Scotland. See Chapter 6.
- **Eyemouth:** See chapter 6.
- **Invergordon:** Located on the Cromarty Firth, Invergordon is Scotland's largest cruise port. The port offers a range of facilities and services to ensure a comfortable experience for passengers.
- **Greenock (Glasgow):** Greenock Ocean Terminal, located on the Firth of Clyde, serves as a primary gateway for cruise passengers visiting Scotland's west coast and the city of Glasgow. The terminal has undergone significant enhancements to improve passenger experience and accommodate increasing cruise traffic.
- **Stornoway:** Stornoway is the gateway for cruise ships exploring the Outer Hebrides. The port has undergone significant developments to enhance its capacity and facilities for cruise vessels.
- **Orkney:** There are two ports of arrival for cruise ships in Orkney – the port of Kirkwall on the east side of the islands, and the smaller Port of Stromness to the west. At Kirkwall, ships berth at either Hatston Pier – Orkney's main cruise ship terminal – or at Kirkwall Pier.
- **Dundee:** Dundee provides access to the city's cultural attractions and serves as a gateway to the eastern regions of Scotland.
- **Aberdeen:** The Port has significantly enhanced its cruise ship facilities with the development of the £400 million South Harbour expansion. This new deep-water harbour accommodates larger vessels and offers modern amenities to improve the experience for cruise operators and passengers.
- **Lerwick:** A key cruise destination, berthing options include Mair's Pier and Holmsgarth 5 (up to 205m), both near the town centre, and Victoria Pier for smaller ships with direct access to local amenities. Larger vessels anchor in Bressay Sound with quick tender transfers. Passenger amenities include complimentary shuttles, a welcome pavilion, public Wi-Fi, and restrooms near Victoria Pier.

Scotland's cruise ports vary significantly in size and capacity, with smaller destinations like Orkney facing intense pressure from large cruise ship arrivals—sometimes bringing over 3,000 visitors into a small town—while larger urban ports such as Newhaven experience a comparatively lower impact within an already well-established visitor economy. Understanding these differences is key to developing tailored management strategies that balance economic benefits with sustainable visitor experiences, ensuring that infrastructure, transport, and community engagement align with the unique demands of each port.

Economic Impact⁶

The cruise industry contributes to Scotland's visitor economy, supporting local businesses and creating employment opportunities. The influx of cruise passengers boosts spending in various sectors, including hospitality, retail, and tourism services.

The Scottish cruise industry supports more than 800 employees, generating an estimated £23 million GVA⁷ for the Scottish economy. In some instances it also helps to extend the tourism season into the 'shoulder months', in the case of Orkney and Shetland for example. Scottish ports serve 27 cruise lines operating 67 different vessels, with various fleet sizes, vessel types, target markets, visit frequencies and cruise lengths/types⁸.

⁴ Source: Cruise Scotland, Marine Scotland, Cruise Mapper

⁵ The Evidence Based Report 16.6. provides more detail on the Scottish ports

⁶ Source: VisitScotland

⁷ GVA: Gross Value Added measures the economic contribution of a sector by calculating the value of goods and services produced (output) minus the cost of inputs (intermediate consumption)

⁸ Source: Cruise Mapper

Economic Contributions⁹:

- **Passenger and Ship Visits:** In 2019, Scotland welcomed approximately 817,000 cruise passengers across 893 ship calls.
- **Direct Expenditure:** Passengers and crew spent an estimated £40.6 million onshore in 2019, benefiting local businesses and services.
- **Employment and Gross Value Added (GVA):** The cruise industry supports over 800 jobs in Scotland, generating around £23 million in GVA

3.4 Policy Context

The development and operation of cruise tourism on the River Forth are shaped by a comprehensive policy context and regulatory framework. These regulations govern environmental standards, navigational safety, and port operations, ensuring that cruise activities align with national and regional goals for sustainability, economic growth, and community engagement.

Key policies and frameworks, detailed in The Evidence Based Report, provide the foundation for managing cruise tourism responsibly while addressing challenges such as infrastructure limitations, environmental concerns, and stakeholder collaboration. Understanding this regulatory landscape is essential for aligning cruise operations with broader policy objectives and achieving long-term benefits for the region.

The key policies and frameworks are:

1. Regulatory Framework

- Port Marine Safety Code (2016)
- International Maritime Organisation (IMO)
- International Ship and Port Facility Security (ISPS) Code

2. Broader Policy Context

- The Climate Change Act 2008
- Climate Change (Emissions Reduction Targets) (Scotland) Act 2019
- Edinburgh Net-Zero 2030
- A Blue Economy Vision for Scotland

3.4.1 Tourism Baseline for Edinburgh, Fife, and South of Scotland

The tourism baseline for Edinburgh, Fife, and the South of Scotland¹⁰ provides an essential framework for understanding the region's current performance and opportunities within the cruise and wider tourism sectors. This analysis includes key indicators such as visitor numbers, economic impact, and infrastructure capacity, offering a foundation for strategic planning.

The diversity of attractions, from Edinburgh's world-class heritage sites to Fife and East Lothian golf and coastal villages and the South of Scotland's cultural and natural landmarks, highlights the region's appeal to a broad range of visitors, including cruise passengers. Detailed insights and supporting data can be found in The Evidence Based Report which outlines trends, challenges, and strategic considerations for sustainable tourism development across the region.

3.4.2 Destination Strategies

This review considers eight tourism strategies that shape the direction and development of the visitor economy across Edinburgh, Fife, the Forth Bridges area, The Lothians, the South of Scotland and the Tay Region¹¹. These strategies, outlined in detail in The Evidence Based Report 18.4.3, provide a comprehensive framework for enhancing the region's tourism offerings, addressing challenges, and aligning with broader objectives such as sustainability, community engagement, and economic growth. Each strategy reflects the unique strengths and priorities of its area, from Edinburgh's cultural heritage to the South of Scotland's

⁹ Source: VisitScotland, Ekosgen Cruise Tourism in Scotland 2020

¹⁰ Note - visitor figures from VisitScotland exclude cruise passengers as they only capture people staying overnight in a location. Cruise ship passengers are not captured in the International Passenger Surveys (IPS) or the National Agencies Great Britain Day Visits Survey

¹¹ The strategy is currently being revised and updated

responsible tourism focus, and collectively they form the foundation for coordinated regional tourism development.

Conclusion

Cruise tourism plays a complementary rather than central role in the tourism strategies of regions surrounding Edinburgh and the South East of Scotland. While its inclusion in the Edinburgh Tourism Strategy 2030 highlights its economic and cultural potential, the absence of dedicated strategic actions—such as sector-specific marketing or targeted visitor experience improvements—limits its impact.

Key Observations:

1. **Strategic Integration:** Cruise tourism supports broader tourism objectives in the Forth region but lacks integration into regional marketing, infrastructure planning, and cultural promotion. This gap prevents the sector from fully capitalizing on its economic and cultural contributions.
2. **High-Value Operators as a Strategic Focus:** Attracting high-value operators, such as luxury, expedition, or boutique cruise lines, aligns with sustainable tourism principles. These smaller ships cater to affluent passengers who contribute more per capita to local economies while placing less strain on infrastructure and reducing environmental impacts.
3. **Alignment with Sustainability Goals:** High-value cruise tourism can support regional goals of sustainability by fostering economic growth through quality over quantity. Smaller, upscale cruise operations bring benefits such as:
 - Increased local spending on high-end goods and services.
 - Greater alignment with environmental and social sustainability through minimized impacts on local ecosystems and communities.

Cruise tourism has the potential to deliver additional economic and cultural benefits to Edinburgh and the South East of Scotland. By addressing strategic gaps and focusing on high-value operators, the region can enhance its competitive position, align with sustainable tourism principles, and deliver a more significant contribution to the region's overall tourism goals.

3.4.3 Industry Best Practice

Adopting industry best practices is essential to ensuring the sustainable development of cruise tourism in Edinburgh and the wider region. Drawing on insights from global frameworks, such as the United Nations World Tourism Organisation (UNWTO) and the European Union (EU), these practices emphasize sustainability across economic, environmental, and social dimensions. They highlight the importance of resilience, future-proofing, and collaborative action across the entire cruise ecosystem.

An analysis of these frameworks and their applicability to the region is provided in The Evidence Based Report.

4. Industry Engagement

The project included an extensive programme of industry engagement, this included:

- Consultation with a number of key private and public sector stakeholders who could provide information and/or opinions about Cruise Tourism to Edinburgh and the South East Region.
- In total to date, we have conducted over 25 consultations with individuals representing 20 different agencies, organisations or businesses.
- Each consultation was conducted on the understanding that all comments and remarks would be non-attributable.
- Fourteen Council Elected Members in Fife and Edinburgh in the locale of the Ports were invited to participate in the consultation. To date 2 have been interviewed.
- An online survey was available for private sector operator across Edinburgh, Fife, Borders, East, West, and Midlothian using 3rd party organisations and social media channels.
- Completed surveys were received back from 47 respondents – a relatively good response rate especially with the number of other tourism related consultation that were underway at the time of this survey. The information gathered does give sufficient detail to extract some consistent, relevant topics. The table below summarises the location of the respondents to the survey:

Table 1 Business Survey Responses

Region	Nos
East Lothian	4
Edinburgh	26
Fife	7
Glasgow City	4
Midlothian	1
Scottish Borders	2
South Lanarkshire	1
Stirling	1
West Lothian	1
Grand Total	47

The detailed findings of the on-line survey are in The Evidence Based Report.

Key Findings from Cruise Ship Local Industry Consultations

1. Transport and Connectivity

Challenges:

- Poor connectivity between some ports (e.g., Rosyth) and train stations or city centres.
- Difficult or impossible to walk between port and transport hubs; no bus links at certain locations.
- Low Emission Zones (LEZ) are problematic for coaches accessing key areas.

Strengths:

- Good connections at Newhaven (tram) and South Queensferry (direct Lothian bus service).
- X99 bus service supports independent travellers to Edinburgh

Suggestions:

- Complimentary electric shuttle buses and improve wayfinding.
- Implement public realm upgrades to enhance passenger experience.

2. Visitor Experience and Infrastructure

Issues:

- Newhaven and Queensferry ports present logistical challenges, including safety concerns and lack of space.
- Insufficient onsite visitor/volunteer facilities, including signage, Wi-Fi, and onward travel information.
- Lack of consistent management of visitor operations between ports.

- Edinburgh Castle faces capacity issues, impacting visitor satisfaction.
- Guides require better training to improve guest experiences.

Suggestions:

- Enhance pre-arrival briefings and real-time visitor info through digital tools.
- Develop authentic, unique, and behind-the-scenes experiences for high-end passengers.
- Increase focus on independent travellers' seeking self-guided or bundled tours.

3. Industry Collaboration and Engagement**Challenges:**

- Cruise lines are risk-averse and prefer familiar, established products.
- Disconnect between stakeholders such as cruise lines, port authorities, and ground handlers.

Opportunities:

- Collaboration with local businesses to deliver authentic experiences.
- Strengthen communication and engagement through "speed-dating" style events.
- Work with national bodies like VisitScotland to enhance online marketing and leverage platforms like Instagram.

4. Market Trends and Passenger Behaviour**Shifts in Demand:**

- Growth in independent travellers', with more opting for self-organized tours.
- Repeat visitors seek new, less touristy destinations and activities.
- Increased demand for high-end, personalized experiences (e.g., Ritz-Carlton, MSC luxury).
- Larger ships bring higher volumes but challenges infrastructure.

5. Economic Considerations:

- Cruise passengers view Scotland as an expensive destination.
- Cost concerns exist for guides and supply chain expenses (estimated at £170-200K annually).

6. Sustainability and Responsible Tourism**Focus Areas:**

- Promote sustainable and active travel (walking, cycling, electric buses).
- Spread visitor numbers across seasons and regions to lessen pressure on Edinburgh.
- Highlight lesser-known attractions to reduce crowding at key sites.

7. General Observations**Engagement:**

- Businesses are eager to collaborate and engage with the cruise market.
- Cruise lines remain conservative but are waking up to trends like bundled tours and consumer-driven travel.

5. Cruise Ships to the Region

In 2024, the 4 ports of the River Forth experienced a record-breaking cruise season¹², highlighting its growing prominence in Scotland's cruise tourism sector. Eyemouth had no Cruise Ships calling in 2024, the last Cruise Ship call was in 2023.

Data on Cruise Ships to the Forth has been compiled from several sources i.e. Cruise Forth, Forth Ports, Cruise Mapper etc. The list of Cruise Ships for the 2024 and 2025 season are detailed in The Evidence Based Report.

5.1 River Forth

Cruise Ships to River Forth 2024

- Total Cruise Ship 140 (note 6 cancelled on day of arrival)
- Total number of turnaround ships 30
 - 16 Leith
 - 14 Rosyth
- Passenger Numbers – 217,423, the passenger numbers are the ships capacity, the passenger manifesto numbers were not available
- Total Passenger Days – 248,103, this relates to the where a ship will remain in port for more than 1 day
- The tables below provide a more detail breakdown of the number of cruise ships, passengers by Port, Month and Day.

Table 2 Cruise Ship Summary April - October 2024

Ports	Total Ships By Port	Total Ships Cancelled	Turnaround Ships by Port	Ships Passengers Capacity	Total Passenger Days
Leith	27	1	16	11913	25563
Newhaven	48	4	0	60220	62650
Rosyth	29	-	14	21990	23390
South Queensferry	36	1	0	123300	136500
Totals	140	6	30	217423	248103

Newhaven receives the largest number of Cruise Ships, with South Queensferry the largest number of passengers.

Table 3 Cruise Ship Arrivals by Month and Port 2024

Arrival Month	Ports				Grand Total
	Leith	Newhaven	Rosyth	South Queensferry	
April	1	5	3	1	10
May	4	6	6	6	22
June	10	12	4	9	35
July	6	10	5	8	29
August	4	12	9	4	29
September	2	7	1	7	17
October	1	-	1	2	4
Total	28	52	29	37	146

Table 4 Cruise Ships Day of Arrival by Port 2024

Day of Arrival	Port			
	Leith	Newhaven	Rosyth	South Queensferry
1 Sunday	4	8	5	4
2 Monday	5	10	2	4
3 Tuesday	1	8	1	6
4 Wednesday	3	9	5	6
5 Thursday	6	5	4	10
6 Friday	3	6	8	3
7 Saturday	6	6	4	4
Total	28	52	29	37

¹² Source: Forth Ports

Table 5 Cruise Ships to River Forth 2025¹³

Month	Ports				Total
	Leith	Newhaven	Rosyth	South Queensferry	
Apr	-	6	-	-	6
May	7	8	6	1	22
Jun	3	5	6	8	22
Jul	4	9	4	7	24
Aug	5	13	6	4	28
Sep	1	9	1	5	16
Oct	1	-	1	2	4
Total	21	50	24	27	122

The number of Cruise Ships in 2025 is slightly down on the 2024 season. This is due to the logistics of de-commissioning of ships and the availability of ships for Cruise Lines to operate. There are 26 turnaround ships, 12 at Leith and 14 at Rosyth.

Table 6 Cruise Ships to River Forth Day of Arrival by Month 2025

Day of the week	Month							Total
	April	May	June	July	August	September	October	
Monday		2	3			2	1	8
Tuesday	2	1	2	3	4	4	-	16
Wednesday	2	2	2	3	4	2	-	15
Thursday	1	1	4	7	7	3	1	24
Friday	-	6	2	3	5		1	17
Saturday	-	5	5	4	3	4	1	22
Sunday	1	5	4	4	5	1	-	20
Total	6	22	22	24	28	16	4	122

Summary of Cruise Ship Arrivals by Port and Day of the Week 2025

- **Leith:** Leith receives 21 cruise ship arrivals across the season, with weekend traffic being the highest. Saturday and Sunday see the most ship visits (5 each), followed by Friday (3). Midweek arrivals are relatively balanced, with one to two ships on select weekdays, indicating a moderate but steady cruise schedule throughout the season.
- **Newhaven:** Newhaven is the busiest port, handling 50 cruise ship arrivals, with peak activity on Sundays (10 arrivals). Wednesdays (9) and Thursdays (8) are also heavy traffic days. The distribution of arrivals is more consistent across the week, but higher weekend traffic suggests increased visitor numbers when other tourism in Edinburgh is also at peak levels.
- **Rosyth:** Rosyth has 24 cruise ship arrivals, with Thursday (7 ships) and Saturday (7 ships) seeing the highest number of calls. Other days have lower volumes, with Friday (4), Tuesday (2), and Sunday (2). The concentration of cruise traffic towards the latter half of the week highlights potential transport and excursion demand spikes on these days.
- **South Queensferry:** With 27 cruise arrivals, South Queensferry experiences its busiest days on Thursdays (7 ships) and Tuesdays (6 ships). The middle of the week sees the heaviest concentration of calls, while weekend arrivals remain moderate. This pattern suggests potential strain on excursion capacity and transportation during these peak midweek periods.

Key Takeaways

- Newhaven is the busiest of the four ports, handling nearly 41% of all cruise arrivals.
- Weekend arrivals are highest at Leith and Newhaven, increasing demand during Edinburgh’s peak visitor days.
- Midweek congestion is notable at South Queensferry and Rosyth, with a high number of arrivals on Tuesdays and Thursdays.

¹³ Information from Cruise Forth

5.2 Greenock Cruise Ships 2024

Greenock, located on Scotland's west coast, is a prominent port for cruise ships, serving as a gateway for passengers exploring various Scottish destinations. Anecdotal feedback from excursion agents indicates that up to 60% of shore excursions from Greenock are directed towards Edinburgh. This substantial influx of visitors can significantly impact Edinburgh's destination capacity, particularly during the peak tourist months of July and August. The list of Cruise Ships to Greenock is detailed in The Evidence Based Report.

Table 7 Greenock Cruise Ships 2024

Month	No of Ships		No Passengers		Total Ships	Total Passengers
	No Transit	No Turnaround	Transit	Turnaround		
Mar	-	6	-	580	6	580
Apr	2	3	4386	1007	5	5393
May	7	9	13831	4093	16	17924
Jun	11	3	23933	552	14	24485
Jul	10	-	22043	-	10	22043
Aug	12	-	21926	-	12	21926
Sep	9	1	22772	184	10	22956
Oct	-	1	-	49	1	49
Nov	-	3	-	147	3	147
Total	51	26	108891	6612	77	115503

5.3 Turnaround Ships

The Importance of Turnaround Ships for Economic Impact

Turnaround cruise ships play a pivotal role in driving economic impact by significantly increasing passenger numbers, extending visitor stays, and boosting local spending. A turnaround operation involves a ship concluding one itinerary and commencing a new one at the same port, resulting in both disembarking and embarking passengers. Accurate documentation and inclusion of turnaround ships in economic analyses are essential to understand their contributions fully.

Recent examples from **Leith** and **Rosyth** illustrate the potential of turnaround ships ¹⁴:

- **Leith (Silver Endeavour, 20th April 2024):**
 - 250 passengers, with **205 disembarking and embarking**, contributing notably to the hospitality sector as at least **142 passengers stayed overnight**.
- **Rosyth (Seabourn Venture, 28th April 2024):**
 - 300 passengers, including **55 transit passengers** who utilized local transport services like shuttle buses to Dunfermline.

Turnaround calls at Leith and Rosyth cater to different passenger profiles. Leith, preferred by luxury and expedition cruise lines, serves a mix of UK and international passengers, with its proximity to Edinburgh's attractions and Edinburgh Airport appealing to overseas visitors. Rosyth primarily serves UK passengers, particularly with lines like Fred. Olsen, offering convenience for central and eastern Scotland travellers with accessible parking. Turnaround ships scheduled at Rosyth in 2025 are 8 Fred Olsen(domestic) and 6 Ponant (international).

Key Findings

1. Economic Benefits of Turnaround Ships:

Turnaround ships effectively **double passenger movements** (disembarking and embarking) in a single destination, leading to:

- Higher demand for local hospitality (hotels, dining, and services).
- Increased transportation use (coaches, private transfers, and local shuttles).
- Greater spending on attractions, retail, and experiences.

¹⁴ Information provided by Cruise Forth

2. Survey Limitations Impacting Economic Analysis:

- Due to the date of project commissioning turnaround ships were not included in passenger research and therefore the economic impact analysis is an estimate on turnaround passengers benefit and potentially underestimates their contributions to the local economy.
- Turnaround passengers often exhibit higher per-capita spending due to extended stays and pre- or post-cruise activities.

3. Future Research Needs:

- Surveys should include turnaround cruise ships to capture the full scope of economic impact.
- Data collection should account for:
 - Disembarking passengers staying overnight.
 - Embarking passengers engaging in pre-cruise spending.
 - Transit passengers utilizing local services.

Conclusion

In 2024, there was a record number of cruise ships - 140 cruise ships and an estimated 217,423 passengers (248,000 passenger days). Newhaven received the most ships (48), while South Queensferry handled the highest passenger capacity (123,300). Leith and Rosyth saw 30 turnaround operations combined. Peak arrivals occurred in June (35 ships), July (29), and August (29), with notable weekly trends—Newhaven busiest on Sundays and Wednesdays, while South Queensferry peaked on Thursdays.

In 2025, cruise arrivals will slightly decline to 122 due to ship decommissioning, but Newhaven remains the busiest port (50 ships), followed by South Queensferry (27), Rosyth (24), and Leith (21). Weekend arrivals dominate at Leith, while Newhaven peaks midweek. South Queensferry and Rosyth expect congestion on Tuesdays and Thursdays.

Turnaround cruise ships offer significant economic opportunities for Edinburgh and South East Scotland by doubling passenger numbers and increasing overnight stays, benefiting hospitality, transportation, and tourism. Improved data collection is essential to fully represent their contributions.

Encouraging more luxury and expedition turnaround ships to Leith and Rosyth can boost the visitor economy, enhance the region's reputation as a premier cruise destination, and support sustainable economic growth.

Maximising the economic impact of turnaround cruise ships in Edinburgh and South East Scotland falls across multiple stakeholders i.e. Forth Ports, Cruise Forth, City of Edinburgh Council and Fife Council, VisitScotland. The lead organisations being Forth Ports on infrastructure and cruise line engagement, and Cruise Forth coordinating passenger experience and local business engagement to maximise economic benefits from turnaround cruise ships.

6. Visiting Cruise Ship Passengers and Crew Survey

6.1 Survey Process

Jump Research undertook the surveys with passengers and crew.

Research was conducted at four of the five ports within the Edinburgh And South-East Scotland¹⁵ area, with interview dates and vessels shown in the table below. The project start date commenced well into the current 2024 Cruise Ship season and therefore the range of ships was restricted i.e. turnaround ships were not in port over the duration of the market research. The full report is available in The Evidence Based Report.

Table 8 Research Locations and Dates

DATE	VESSEL	PORT
17/09/2024	Seven Seas Splendor	Newhaven
18/09/2024	Seabourn Sojourn	Newhaven
21/09/2024	Regal Princess	South Queensferry
25/09/2024	Seven Seas Splendor	Newhaven
27/09/2024	Norwegian Star	Newhaven
01/10/2024	Norwegian Star	South Queensferry
03/10/2024	Regal Princess	South Queensferry
04/10/2024	Hamburg	Rosyth
24/10/2024	Sirena	Leith

The survey process was as follows:

- Face-to-face interviews were undertaken by our trained market research interviewers
- Interviewers approached a random sample of passengers and crew as they re-embarked the cruise ships and invited them to participate in the short survey
- Two questionnaires were designed – one for passengers, of approximately 8 minutes in length; one for crew, approximately 2 minutes in length
- The survey was administered using iPads to capture data
- A QR code linking to an online version of the survey was offered to allow passengers or crew to complete the survey later if they were short of time
- At the end of the fieldwork period, the survey was closed and data was fully checked and cleaned to ensure only valid, complete responses were included in analysis

We achieved a final sample size of n=777, comprising 657 passengers and 120 crew members. The overall sample size has a maximum error of $\pm 3.5\%$ at the 95% confidence level.

All research was undertaken in accordance with MRS Code of Conduct and UK GDPR legislation.

6.2 Key Findings

Passengers

- Our sample of cruise passengers¹⁶ tended to be older (89% over 55yrs), mostly from USA / Canada (72%), and travelling in couples (70%) or groups of adults (19%).
- Half had visited the Edinburgh and South-East Scotland region previously.

Activities & Excursions

- The majority of passengers who disembarked the ships went on planned excursions, most of them on tours organised by the cruise ship (64%). A small number (5%) organised a tour themselves, usually

¹⁵ Edinburgh and South East Scotland

¹⁶ The research was conducted towards the end of the cruise ship season, which may have influenced the age demographics and nationalities of the passengers surveyed.

booking direct with a tour operator. The remaining third of passengers visited a nearby town independently.

- Passengers spent an average of 4.5 hours on shore and almost 8 in 10 visited Edinburgh city – either as part of a tour or independently. This was true of passengers docking at all four ports.
- Around 6 in 10 did some research and activity planning in advance of arrival – using mostly online sources; however, the Cruise Forth volunteers were also an important source of information for passengers, with 58% receiving information or assistance from them.
- Passengers engaged in a range of activities on shore, with cultural sights and city tours undertaken by more than half, while food and drink and shopping were also popular.
- Most spent some money within the region – average spend was £33.15 per person. Most spent on food and drink from local cafes / restaurants (81%) and 6 in 10 spent in local shops.

Transport

- Linked to the high proportion of passengers on organised tours, almost 6 in 10 travelled by tour bus, and almost a further fifth used shuttle buses provided by the ship. A quarter walked and almost 1 in 10 used taxis or trams to get around during their time on shore.
- Half felt it was very easy to travel around the Edinburgh and South-East Scotland area – however this was one of the areas most likely to be identified for improvement, with passengers looking for greater availability of taxis and shuttle buses, and more information on using local public transport.

Overall Experience

- Overall, passengers were very positive about their visit experience, with 93% giving a rating of 8 or more out of 10.
- 6 in 10 said they were very likely to recommend visiting the Edinburgh and South-East Scotland area to others and half were very likely to return themselves.
- Most visitors either said nothing could have improved their experience. For those who did make a suggestion, key areas for improvement focused on having more time in port / on shore / at attractions, making improvements to transport and easier access / better facilities in port.

Crew

- The vast majority of crew who disembarked the ships visited the local town / city during their time on shore (88%).
- Most (81%) spent money on shore, with an average spend of £31.15 per person.
- Crew spend was mostly on food and drink from local cafes (54%) and shopping from local shops (53%), while a third spent money in multi-national high street shops.

7. Infrastructure Assessment Ports / Public Realm

Infrastructure Audit Overview

An infrastructure audit was conducted to evaluate the tourism infrastructure and transport linkages at each of the five ports in the region. The audit aimed to identify strengths, weaknesses, and opportunities for improvement in how each port serves cruise passengers and integrates with nearby amenities and attractions. Site visits to all five ports were undertaken as part of this assessment, focusing on the condition and accessibility of nearby public spaces, transport connections, and facilities available to passengers.

The primary objectives of the audit included:

- Assessing the quality of the public realm, such as pedestrian-friendly zones, public spaces, and key entry and exit points.
- Identifying areas where infrastructure investments could enhance the visitor experience, particularly for cruise passengers.
- Evaluating transport linkages between the ports and local attractions, ensuring seamless connections for excursions and independent travellers.

Photographs documenting the infrastructure and surroundings of each port were taken during these site visits and are catalogued in a dedicated digital folder for reference and future planning.

Audit Findings and Structure

The findings from the audit are presented as follows:

- Sections 7.1 – 7.5: Summaries for each of the five ports.
- Section 7.6: A consolidated analysis of the key findings from the site visits, highlighting common challenges and opportunities for strategic improvements across the region.

The audit forms the basis for recommendations to address infrastructure gaps and prioritise investments that align with regional tourism objectives.

7.1 Leith

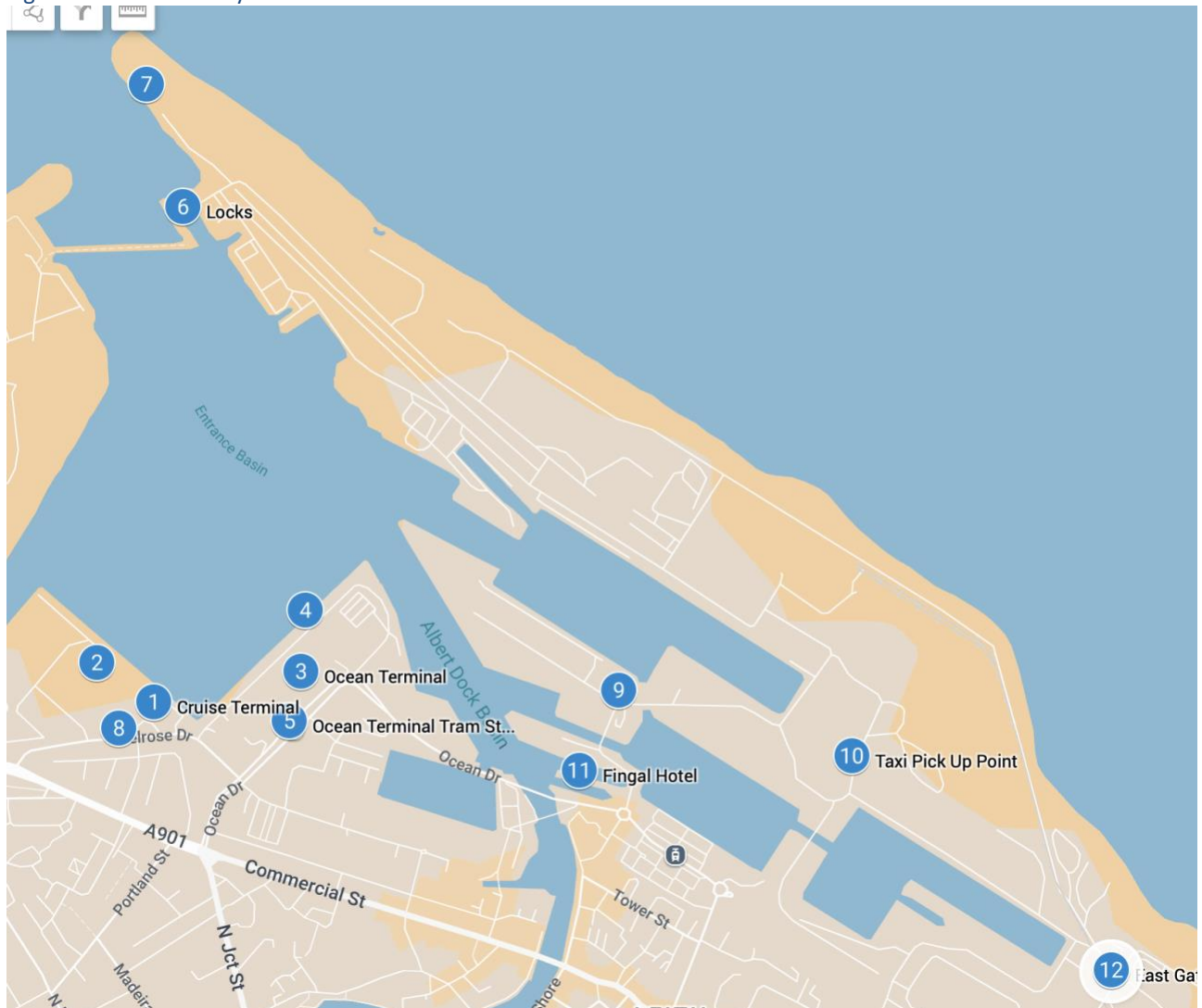
Leith serves as a key port for both transit and turnaround cruise operations, accommodating small to mid-sized ships up to 210 meters in length and with a maximum draught of 9.7 meters, making it suitable for a wide variety of cruise vessels.

Leith Port operates with a lock system that regulates water levels within the docks, impacting vessel movements, including cruise ships. The locks accommodate small to mid-sized vessels up to 210 meters in length and a maximum draught of 9.7 meters, requiring ships to align arrivals and departures with specific tidal windows. This limits scheduling flexibility for operators.

Larger vessels can bypass the locks using the recently added deep-water outer berth, though it is primarily intended for offshore renewables and only occasionally used for cruise operations. Adverse weather and tidal changes can further complicate lock schedules, potentially causing delays.

In July 2024, Leith successfully trialled the new deep-water outer berth with the arrival of the 293-meter-long cruise ship, Carnival Legend. This facility, primarily designed to support the largest offshore renewables vessels and is complemented by 175 acres of adjacent land designated for renewables logistics, marshalling, and manufacturing. While this deep-water berth offers impressive capabilities, demand for berthing extra-large cruise ships remains limited, as such vessels can also be accommodated at other River Forth ports, such as Rosyth and South Queensferry, which are well-equipped for larger cruise operations.

Figure 1: Leith docks layout



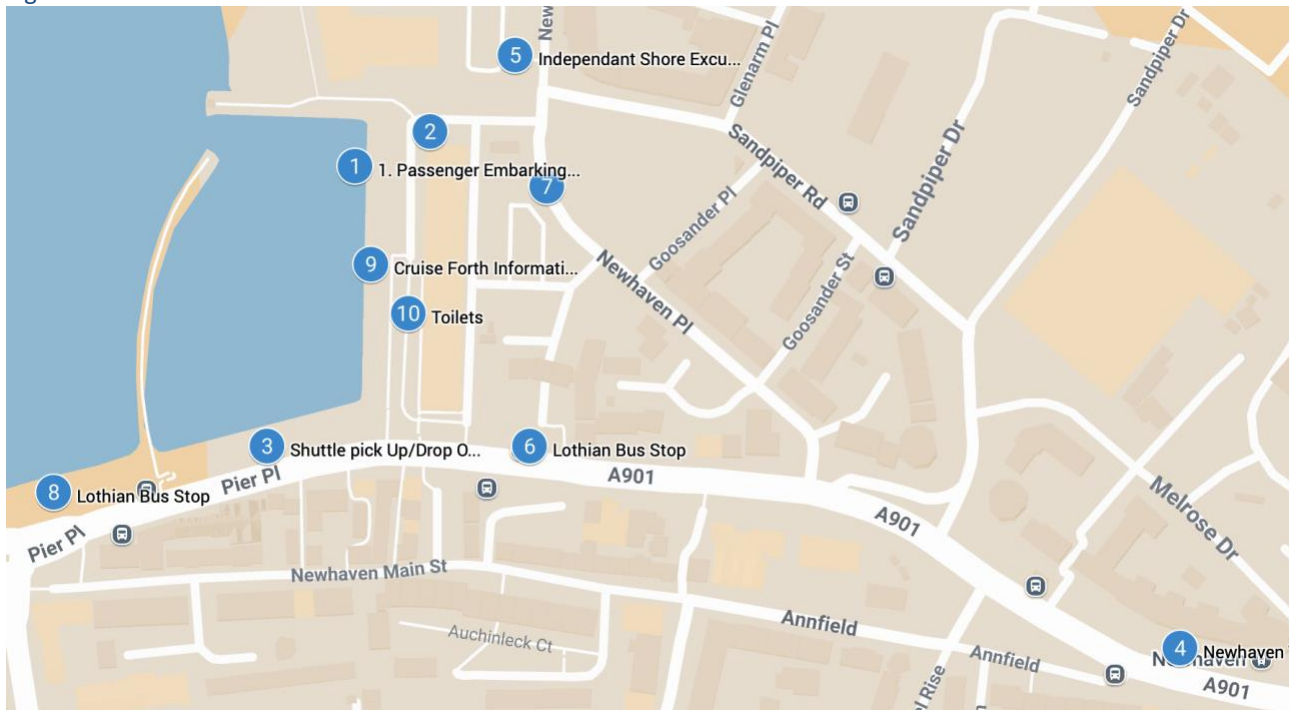
Key: 1. Cruise Terminal; 2 – Coach Parking; 3 – Ocean Terminal Centre; 4 – Royal Yacht Britannia; 5 – Tram Stop; 6 – Locks; 7 Deep Water berth; 8/9/10 – Taxi Pick Up; 11 – Fingal Hotel; 12 – East Gate

7.2 Newhaven Harbour

Newhaven Harbour, a Category B listed site, is recognized for its historical and architectural significance, with key structures including the Eastern and Western Lighthouses also holding Category B listed status.

Primarily serving as a tendering point, Newhaven Harbour lacks extensive cruise terminal facilities and is best suited for smaller to mid-sized vessels. However, its use as a cruise ship terminal is challenged by tidal factors, including the harbour's tidal range, limited water depth, and the logistical complexities of managing ship arrivals and departures. These challenges are particularly pronounced for larger vessels and can impact both operational efficiency and the overall visitor experience.

Figure 2: Newhaven location



Key: 1-Passenger Embarkation/Disembarkation; 2- Shore Excursion Coach Pick Up; 3 -Shuttle Bus Pick Up / Drop Off; 4- Tram Stop; 5- Independent Shore Excursion pick Up/Drop off; 6,7,8 – Bus Stops; 9 – Cruise Forth Information; 10 – Toilets.

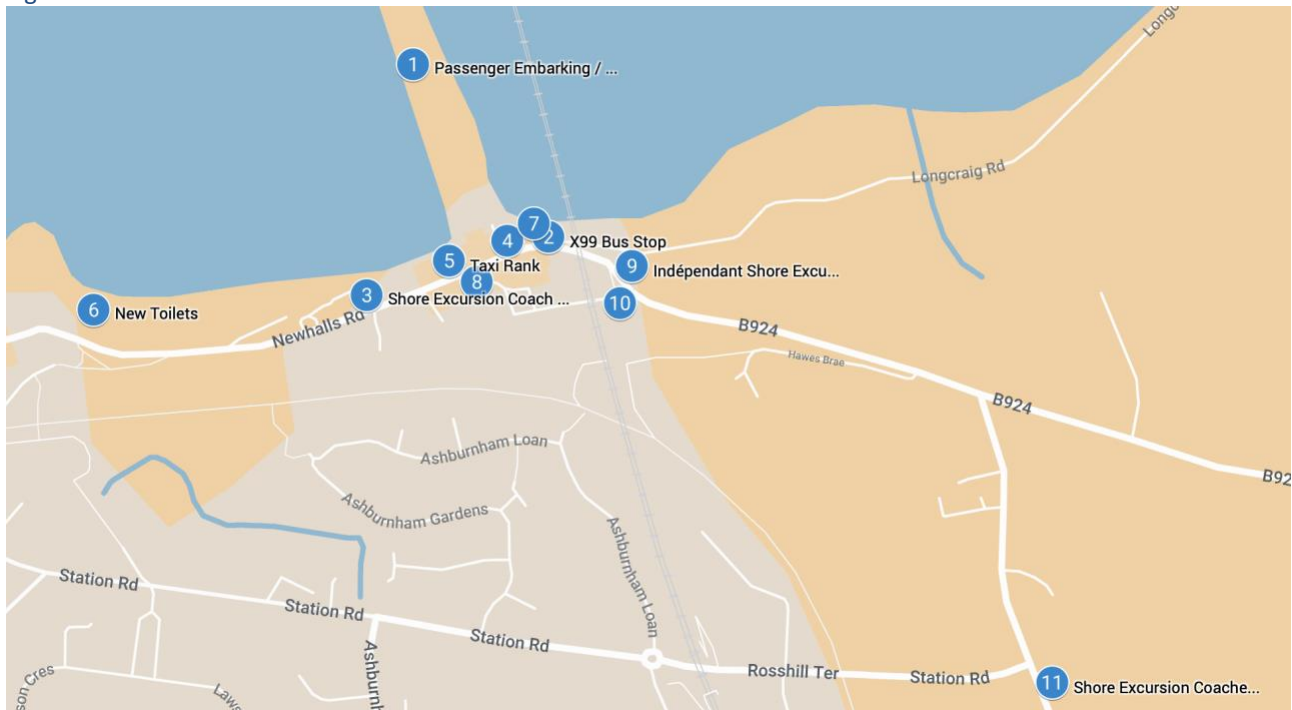
7.3 South Queensferry

Hawes Pier in South Queensferry is owned and operated by the City of Edinburgh Council. It serves as a tender point for cruise passengers arriving from anchored ships¹⁷ in the Firth of Forth. Its location allows it to accommodate the anchorage of larger cruise ships, making it a key access point. While it connects passengers to the City and the wider region, challenges impact its efficiency and passenger experience. Congestion in the public areas during peak tender arrivals, limited facilities such as seating and shelter, and accessibility issues pose significant challenges. Additionally, traffic congestion on the A90 during early mornings can delay Shore Excursions into Edinburgh and potentially impacting on passenger flow and scheduling.

The X99 bus service provides an efficient and convenient option for independent passengers, offering direct and frequent connections to Edinburgh city centre. This service helps alleviate some of the logistical challenges for independent travellers, enhancing their overall experience. Improved multilingual signage, and enhancements to pier facilities would improve the pier's functionality and welcoming experience for cruise visitors.

¹⁷ Anchorage managed by Forth Ports

Figure 3: Hawes Pier location



Key: 1- Passenger Embarking / Disembarkation; 2-X99 Bus Stop; 3- Shore Excursion Coach Parking; Cruise Forth Information; 5-Taxi Rank; 6 – New toilets; Existing Gents Toilets; 8- Existing Ladies Toilets; 9 – Independent Shore Excursion Parking; 10 – Jacobs Ladder Steps o Dalmeny Station; 11 – Shore Excursion Overspill Parking;

7.4 Rosyth

Rosyth, is a functional industrial and naval port, operates under strict security measures to ensure the safety and efficiency of its operations. The terminal is a controlled area, designed to accommodate the rigorous requirements of embarkation and disembarkation processes for cruise passengers. These measures ensure a secure but restricted environment, meaning passengers cannot walk out of the port and must use transport services to reach external destinations.

Rosyth has six docking berths, including the North Wall, which is the primary berth used for cruise ships. The North Wall can accommodate either one large cruise ship¹⁸ or up to three mid-sized ships simultaneously. However, air draft restrictions (see Section 7.7) limit the size of vessels that can access the port. Rosyth is suited for small to mid-sized cruise ships. The RORO¹⁹ Berth which is adjacent to the Cruise Terminal is used occasionally for cruise Ships, although the length of the berth limits the size of cruise ship.

As one of the primary turnaround ports in the region alongside Leith, Rosyth plays a key role in supporting cruise tourism. The terminal has the capacity to accommodate up to 1,000 passengers per turnaround, managing both morning disembarkation and afternoon embarkation. Each ship turnaround typically handles between 400 and 500 passengers, requiring efficient management of large volumes of luggage and passenger flows.

The distance from the main cruise terminal to the North Wall berth is approximately 500 meters, requiring passengers to either walk or use shuttle transport services for embarkation and disembarkation.

Rosyth port lacks direct public transport connections, meaning passengers cannot walk to a train station or bus stop. Instead, shuttle buses, taxis, or private transfers are required to take passengers to nearby transport hubs. The closest train station, Inverkeithing, is approximately 5 miles away and requires a shuttle bus or taxi transfer. Similarly, there is no direct public bus service from the port, and all passengers relying on onward transport must arrange a connection via pre-booked transfers, taxis, or cruise-organized coaches. These limitations can impact independent travellers who may not have pre-arranged transport options and may rely on cruise-organized excursions or private hire vehicles.

¹⁸ Source Forth Ports port information - Maximum Length: Approx. 250 meters, Maximum Air Draft: approx. 55m clearance,, Maximum Draft: Approx. 8.5 meters

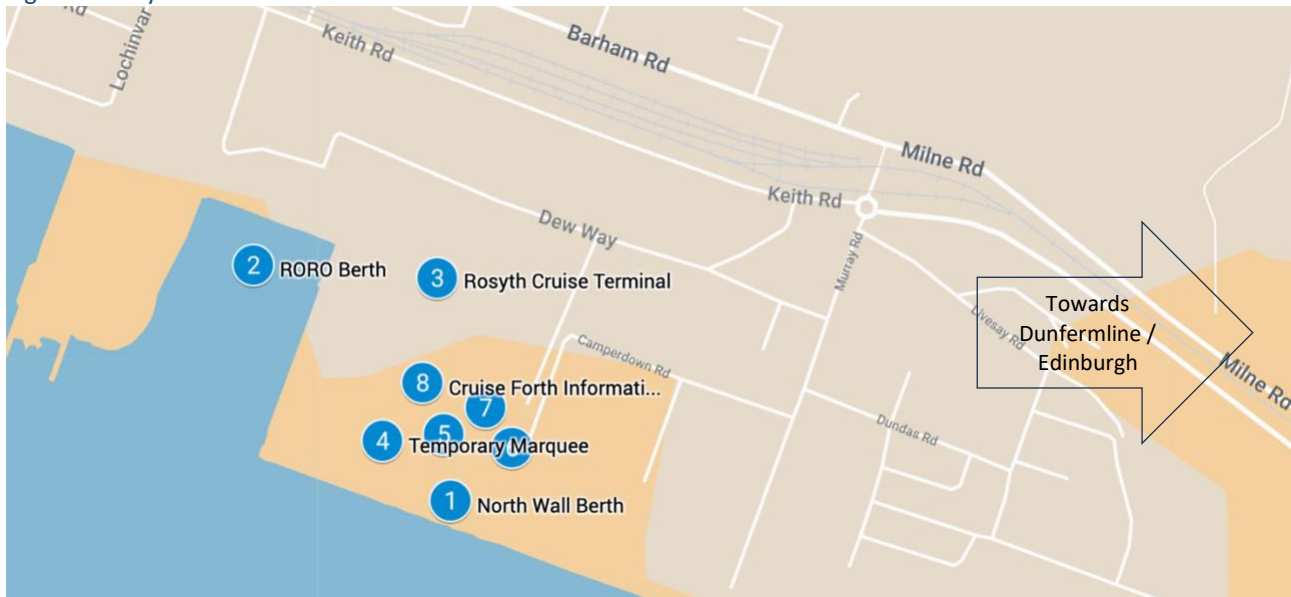
¹⁹ Roll on Roll Off

Rosyth has a permanent purpose built dedicated cruise terminal with facilities designed to support efficient passenger processing and enhance the overall cruise experience. The terminal includes spacious check-in areas, dedicated customs and immigration facilities, comfortable waiting lounges, accessible amenities, and complimentary Wi-Fi. The permanent terminal can accommodate up to 1,000 passengers, providing scalable solutions for cruise operations within the port's size limitations.

Additional facilities include dedicated parking areas for coaches and private vehicles, enhanced security screening areas, and accessible restrooms to streamline embarkation and disembarkation processes. However, passenger amenities remain limited, as there are no food and beverage options, currency exchange, or ATMs available. The seating capacity within the terminal is approximately 250 passengers after registration.

The industrial setting of the port and the longer walk to cruise ships at the North Wall Berth present challenges for passenger convenience. To supplement capacity, a temporary marquee is used as an overflow terminal during peak periods, offering essential services such as luggage handling, seating, and shelter. Additionally, Cruise Forth volunteers provide visitor information, helping to enhance the overall passenger experience. Shore excursion coaches, shuttle buses, and taxis are conveniently located directly outside the marquee, ensuring seamless onward transportation for cruise passengers.

Figure 4: Rosyth location



Key: 1-North Wall berth; 2 – RORO Berth; 3- Main Cruise Terminal 4- Temporary Marquee 5- Shore Excursion Pick Up; 6 – Shuttle Bus Pick Up; 7- Taxi Pick up; 8 Cruise Forth Information

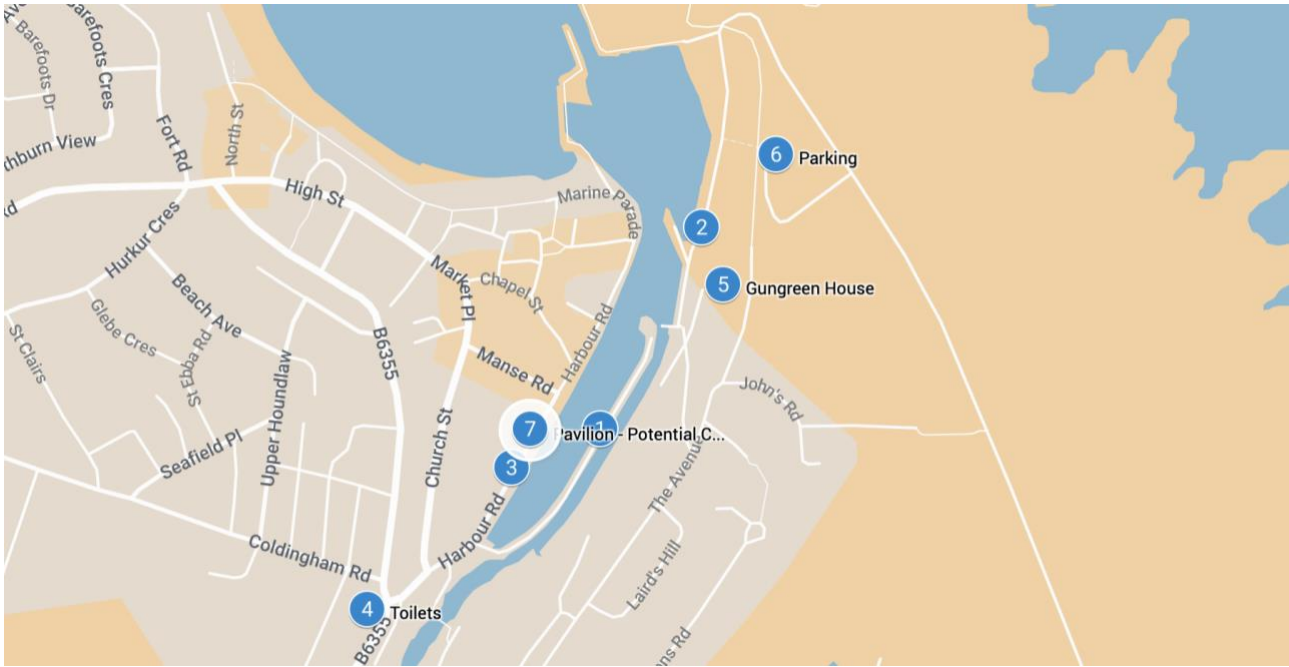
7.5 Eyemouth

Eyemouth Harbour, located in the heart of the historic town of Eyemouth, is a key destination for small to mid-sized cruise vessels. Passengers are tendered ashore, arriving adjacent to the town centre, offering convenient access to local attractions such as Gunsgreen House, Eyemouth Museum, and natural sites like St. Abbs Head Nature Reserve.

While the harbour currently lacks dedicated cruise terminal infrastructure, a Harbour Masterplan is under development to explore opportunities for growth, including the potential for on-shore berthing. Such developments could significantly enhance passenger convenience and operational efficiency, positioning Eyemouth as a more versatile destination for boutique and expedition cruise ships.

These improvements would not only elevate the visitor experience but also unlock greater economic benefits for the local community and region.

Figure 5: Eyemouth Harbour layout



Key: 1- Passenger embarking / disembarking; 2 /3 Shore Excursion Coach Parking ; 4 – Toilets; 5 – Gungreen House; 6 – Additional parking; 7- The Pavilion – Potential Cruise facility

7.6 Port Overview

South Queensferry				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Infrastructure and Facilities	<ul style="list-style-type: none"> Hawes Pier owned and managed by City of Edinburgh Council. Multiple companies lease and operate buildings. Compact footprint limits staff facilities for cruise operations. Shelter and seating are insufficient.- Toilets in poor condition, temporary facilities lack permanence and reduce disabled parking spaces – new toilets at west end of Hawes Car Park due for completion May 2025 Anchorage managed by Forth Ports 	<ul style="list-style-type: none"> Slippery pier surface posing safety hazards.- Tidal issues complicate tender movements. Narrow, uneven pathways hinder accessibility.- Overcrowding at exits during peak arrivals. 	<ul style="list-style-type: none"> Improve pier surface conditions for safety. Install permanent, accessible toilets with regular maintenance (actioned) Add sheltered seating and indoor waiting areas. Enhance pathways for accessibility. 	<ul style="list-style-type: none"> City of Edinburgh Council Cruise Operators Local Businesses
Passenger Services and Information	<ul style="list-style-type: none"> No dedicated Wi-Fi for passengers. Temporary facilities for Cruise Forth volunteers. Lack of permanent tourist information facility or signage – new Forth Bridges Trail directional sign at Hawes Pier installed Volunteers provide maps but lack storage. 	<ul style="list-style-type: none"> Poor passenger orientation. Limited promotion of South Queensferry. Volunteers lack adequate facilities for their role. Signs only in English, limiting accessibility. 	<ul style="list-style-type: none"> Review options for permanent tourist information / volunteers facility and multilingual signage. Expand volunteer facilities with storage. Promote local attractions and activities at ports.- Provide free, reliable Wi-Fi. 	<ul style="list-style-type: none"> Cruise Forth City of Edinburgh Council Community Organisations
Transport Access	<ul style="list-style-type: none"> X99 bus provides excellent shuttle service to Edinburgh. 43 Bus offers a good connection but does not service Hawes Pier. 	<ul style="list-style-type: none"> Access to Dalmeny Station steep and unsafe steps. Limited space for coaches and independent excursion operators. 	<ul style="list-style-type: none"> Add more accessible taxi ranks and shuttle buses. Explore options for a holding area for independent excursion operators. 	<ul style="list-style-type: none"> Transport Providers City of Edinburgh Council Community Organizations

South Queensferry				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
	<ul style="list-style-type: none"> Limited taxi rank and private hire options. Excursion coaches use Bankhead Road as a staging area. Traffic congestion affects flow. Dedicated area for private shore excursion operators 	<ul style="list-style-type: none"> Parking congestion at peak times. Traffic from one-way system adds delays. 	<ul style="list-style-type: none"> Improve signage and coordination for traffic management. Increase parking availability. 	
Nearby Attractions	<ul style="list-style-type: none"> Key attractions include South Queensferry, Hopetoun House, Dalmeny House, and Queensferry Museum. Scenic views of Forth Bridges enhance visitor appeal. 	<ul style="list-style-type: none"> Overcrowding at waterfront dilutes the experience. Limited integration of attractions into cruise itineraries. Business operations disrupted by cruise traffic. 	<ul style="list-style-type: none"> Explore with Shore Excursion Agents options to develop itineraries featuring local attractions. Designate specific areas for coach parking to preserve waterfront access. Enhance signage for nearby attractions. 	<ul style="list-style-type: none"> Shore Excursion Agents Local Attractions Forever Edinburgh Cruise Forth Community Organizations
Visitor Experience	<ul style="list-style-type: none"> Public realm along waterfront offers excellent views. Onshore Teams ensure smooth operations despite infrastructure limitations. 	<ul style="list-style-type: none"> Congestion at Hawes Pier impacts visitor flow. Poor toilet facilities reduce satisfaction. Lack of multilingual signage and orientation tools hinders accessibility. 	<ul style="list-style-type: none"> Upgrade toilet facilities to meet visitor expectations. Provide multilingual signage and maps. Expand capacity for peak volumes through improved infrastructure and scheduling. 	<ul style="list-style-type: none"> City of Edinburgh Council Cruise Operators Cruise Forth Community Organisations Local Businesses
Business Impact	<ul style="list-style-type: none"> RNLI, Bright Bus Tours, and Forth Boat Tours disrupted during cruise arrivals. Tenders from Maid of Forth take precedence over regular tours. 	<ul style="list-style-type: none"> Some Local businesses perceive large passenger volumes as disruptive. Reduced access to business offerings for non-cruise visitors. 	<ul style="list-style-type: none"> Dynamic information of Cruise Ship arrivals / departures Working with local businesses to promote opportunities as part of cruise itineraries to ensure mutual benefits. 	<ul style="list-style-type: none"> Local Businesses City of Edinburgh Council Cruise Forth Cruise Operators

Eyemouth				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Infrastructure	<ul style="list-style-type: none"> Passengers tendered ashore to landing pontoons adjacent to the town centre. Harbour supports working functions e.g. vessel repairs, marine engineering, and refuelling. Masterplan in development for Off-Shore renewable energy opportunities. 	<ul style="list-style-type: none"> Limited facilities for passengers (no dedicated terminal or wet weather facilities). Public toilets in poor condition and not regularly open. No Wi-Fi availability for passengers. 	<ul style="list-style-type: none"> Develop a dedicated passenger terminal using the Pavillion for wet weather facilities and toilets. Upgrade public toilets near the harbour. Provide Wi-Fi for passengers. 	<ul style="list-style-type: none"> Eyemouth Harbour Trust Scottish Borders Council SSDA SOSE
Passenger Services and Facilities	<ul style="list-style-type: none"> Adjacent town centre allows passengers to explore on foot. Harbour features serviced pontoons with electricity and water supplies. Restaurants, cafes, and shops nearby. 	<ul style="list-style-type: none"> No passenger-specific amenities or facilities. Insufficient toilet availability.- Lack of promotional infrastructure for attractions and tours. No wet weather facilities. 	<ul style="list-style-type: none"> Enhance the Pavillion to include passenger amenities and information points. Provide covered waiting areas near pontoons. Increase promotion of local attractions through digital 	<ul style="list-style-type: none"> Eyemouth Harbour Trust Scottish Borders Council SSDA SOSE Local Businesses Cruise Operators
Transport Access	<ul style="list-style-type: none"> Borders Buses operate the 235 service connecting Eyemouth with Berwick-upon-Tweed and Reston railway station.- Parking available near the harbour for cars and coaches. Coaches access the harbour, though bridge closures may require longer walking routes. 	<ul style="list-style-type: none"> Limited local transportation options to reach key attractions. Bridge access for coaches may be restricted. No regular direct public transport to major nearby attractions (e.g., St Abbs, Paxton House). 	<ul style="list-style-type: none"> Improve coordination of coach parking and access. Collaborate with transport providers to enhance bus connectivity to attractions. Provide clear signage and passenger guidance for transport options. 	<ul style="list-style-type: none"> Transport Providers Eyemouth Harbour Trust SSDA Community Organisations

Eyemouth				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
	<ul style="list-style-type: none"> Closest airports are Edinburgh and Newcastle. 			
Nearby Attractions	<ul style="list-style-type: none"> Gungreen House highlights smuggling history. Eyemouth Museum showcases fishing heritage. Nature attractions like St Abbs Head Nature Reserve. Paxton House, Abbotsford House, Lindisfarne, and Holy Island included in shore excursions. 	<ul style="list-style-type: none"> Limited guided tours or shore excursions available. Some attractions further away require reliable transportation. Insufficient promotion of nearby attractions. 	<ul style="list-style-type: none"> Develop and promote more guided tours and shore excursions. Collaborate with local attractions to provide enhanced visitor experiences. Increase marketing of nearby historical and nature sites. 	<ul style="list-style-type: none"> SSDA Local Attraction Operators Shore Excursion Agents Cruise Operators
Impacts on the Visitor Experience	<ul style="list-style-type: none"> Small working port with limited cruise terminal facilities. Accessibility to key attractions relies on transportation. Tender operations depend on weather conditions. Few guided tour options available. 	<ul style="list-style-type: none"> Passenger satisfaction reduced due to lack of facilities and dependency on transport. Weather-dependent tendering disrupts plans. Limited options for structured activities. 	<ul style="list-style-type: none"> Expand shore excursion offerings. Create a welcoming area at the port with covered facilities and local tour guides. Explore with Harbour Trust option for targeting Expedition Cruise Ships Working with Harbour Trust exploring option for Cruise Ships with the harbour masterplan opportunities. 	<ul style="list-style-type: none"> Eyemouth Harbour Trust Scottish Borders Council SOSE SSDA Cruise Operators Shore Excursion Agents

Newhaven				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Infrastructure	<ul style="list-style-type: none"> Floating pontoons used for tendering passengers. Agreement with local restaurant to provide toilet facility. Not signposted No wet weather facilities. No dedicated Wi-Fi for passengers or volunteers. 	<ul style="list-style-type: none"> Steep gangways during tidal changes inconvenience passengers, especially older passengers and those with mobility challenges. Limited shelter and seating. 	<ul style="list-style-type: none"> Improve public toilet facilities to benefit all visitors / residents to locale Explore options for wet weather shelters Provide Wi-Fi. 	<ul style="list-style-type: none"> City of Edinburgh Council Forth Ports Heart of Newhaven Community City of Edinburgh Council Local Businesses
Tidal and Weather Challenges	<ul style="list-style-type: none"> Tendering services affected by low tide, requiring alignment with high tide schedules. Strong winds and storms disrupt tendering operations. 	<ul style="list-style-type: none"> Delays or diversions to other ports (e.g., South Queensferry) due to tidal and weather conditions. Mobility challenges with steep gangways during low tide. 	<ul style="list-style-type: none"> Dynamic cruise ship scheduling information Review gangway improvement opportunities 	<ul style="list-style-type: none"> City of Edinburgh Council Forth Ports Cruise Operators
Passenger Services and Facilities	<ul style="list-style-type: none"> Visitor information provided by Cruise Forth volunteers. Proximity to Leith, Ocean Terminal, allows passengers to explore on foot Restaurants, cafes, and shops nearby. 	<ul style="list-style-type: none"> Lack of permanent passenger facilities. Orientation information limited and only in English, limiting accessibility for international passengers. 	<ul style="list-style-type: none"> Explore options for wet weather facility with information points. Add orientation signs and multilingual signage. 	<ul style="list-style-type: none"> City of Edinburgh Council Cruise Forth Forth Ports Community Organisations
Transport Access	<ul style="list-style-type: none"> Lothian Buses operate multiple routes to the city centre. Tram stop located 500 yards from the harbour. Taxis available, no dedicated rank identified. 	<ul style="list-style-type: none"> No dedicated taxi rank causes inconvenience. Limited coach parking in the area. Passengers require clear guidance to navigate public transport options (provided by volunteers). 	<ul style="list-style-type: none"> Explore options to improve taxi rank and shore excursion agents parking Improve signage for tram and bus services. 	<ul style="list-style-type: none"> Transport Providers Newhaven Harbour Trust City of Edinburgh Council

Newhaven				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
	<ul style="list-style-type: none"> City tour bus stops near the harbour. 	<ul style="list-style-type: none"> Independent Excursion Agents have to use local hotel car park adjacent to harbour. 		
Nearby Attractions	<ul style="list-style-type: none"> Leith and the Royal Yacht Britannia (10 minutes by tram or taxi). Botanic Gardens (15–20 minute walk). Newhaven Museum (limited opening hours). 	<ul style="list-style-type: none"> Limited opening hours for nearby attractions. Limited promotion of nearby attractions / experiences, information provided by Cruise Forth volunteers. 	<ul style="list-style-type: none"> Develop promotional opportunities with local attractions Explore collaborative partnerships with nearby attractions to align schedules with cruise ship arrivals. 	<ul style="list-style-type: none"> Cruise Forth Cruise Operators Forever Edinburgh Community Organisations Local Attractions
Impacts on the Visitor Experience	<ul style="list-style-type: none"> Tendering logistics and steep gangways reduce comfort and accessibility. Limited facilities like seating and wet weather facilities. 	<ul style="list-style-type: none"> Passengers face challenges due to insufficient facilities and transport coordination. Perceptions of the port are impacted by delays or lack of amenities. 	<ul style="list-style-type: none"> Review options for visitor facilities to include covered wet weather facilities, waiting areas toilets and signage. WiFi facilities 	<ul style="list-style-type: none"> City of Edinburgh Council Forth Ports Heart of Newhaven Community Cruise Forth

Leith				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Infrastructure	<ul style="list-style-type: none"> Terminal equipped for embarkation and disembarkation with check-in desks, baggage handling, and toilets. Wi-Fi available in the terminal. Deep-water berth supports larger vessels with coach access for shore excursions. 	<ul style="list-style-type: none"> Only one security screener can cause queues during peak embarkation times. Limited use of the deep berth and passengers coached to port gates which lacks facilities or clear directions. 	<ul style="list-style-type: none"> Provide covered waiting areas and amenities at port gates. Improve signage for taxis and transport connections. 	<ul style="list-style-type: none"> Forth Ports City of Edinburgh Council
Tidal and Weather Challenges	<ul style="list-style-type: none"> No significant tidal challenges The port is weather-resilient, with minimal operational disruptions caused by environmental factors. 	<ul style="list-style-type: none"> Limited issues related to tidal and weather conditions. 	<ul style="list-style-type: none"> NA 	<ul style="list-style-type: none"> Forth Ports
Passenger Services and Facilities	<ul style="list-style-type: none"> Cruise Forth volunteers provide support and information within the terminal. Adjacent Ocean Terminal Shopping Centre offers dining and retail options. Accessible facilities for passengers with mobility challenges. 	<ul style="list-style-type: none"> Limited orientation signage, only in English. No dedicated facilities for passengers at the deep berth. No indoor waiting areas or weather cover at port gates if deep berth used, although limited number ships use this facility. 	<ul style="list-style-type: none"> Install multilingual signage and enhance wayfinding tools. Explore options for temporary passenger facilities near deep berth. 	<ul style="list-style-type: none"> Forth Ports Cruise Forth
Transport Access	<ul style="list-style-type: none"> Tram and bus services provide frequent connections to Edinburgh city centre and airport. Parking available for cars and coaches. Taxis generally available but no dedicated rank. 	<ul style="list-style-type: none"> Lack of a dedicated taxi rank causes inconsistency in service. Ocean Terminal redevelopment limits parking availability. 	<ul style="list-style-type: none"> Options for a dedicated taxi rank at the terminal. Digital information on trams and buses at terminal Improve wayfaring / orientation signage. 	<ul style="list-style-type: none"> Transport for Edinburgh Forth Ports City of Edinburgh Council

Leith				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Nearby Attractions	<ul style="list-style-type: none"> • Adjacent Ocean Terminal Shopping Centre. • Royal Yacht Britannia is a key attraction, easily accessible by foot. • Edinburgh city centre is 15–20 minutes away by tram, bus, or taxi. 	<ul style="list-style-type: none"> • Limited promotion of nearby attractions. • Limited information on transport options to access city centre and attractions. Information provided by Cruise Forth volunteers. 	<ul style="list-style-type: none"> • Improve promotional materials highlighting nearby attractions. • Digital visitor information on attractions and transport options 	<ul style="list-style-type: none"> • Cruise Forth • City of Edinburgh Council • TFE • Local Attractions
Impacts on the Visitor Experience	<ul style="list-style-type: none"> • Ease of access to Edinburgh Centre and key attractions • Good transport options • Good terminal passenger flow. • Ocean Terminal provides dining and shopping options. 	<ul style="list-style-type: none"> • Limited facilities at the deep berth detract from the experience • Limited signage and orientation for passengers , although Cruise Forth provide this service 	<ul style="list-style-type: none"> • Improve passenger navigation. • Explore options for temporary facilities at the deep berth to include seating, shelter, and information points. 	<ul style="list-style-type: none"> • Forth Ports • City of Edinburgh Council • Cruise Forth

Rosyth				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Infrastructure	<ul style="list-style-type: none"> 6 Docking berths, North Wall primary cruise ship berth. Functional cruise terminal accommodates up to 1,000 passengers with seating for 250 Restrooms, and complimentary Wi-Fi. Luggage handling and security screening processes in place. Accessible facilities with step-free access and accessible restrooms. Temporary marquee used for luggage handling, embarking, and disembarking of passengers. 	<ul style="list-style-type: none"> Industrial setting. Limited passenger facilities No food and beverage options, currency exchange, or ATMs. Longer walk to cruise ships at the North Wall berth. Restrictions on the size of cruise ships. 	<ul style="list-style-type: none"> Enhance passenger amenities, introduce food and beverage options, ATMs, and improve terminal aesthetics. 	<ul style="list-style-type: none"> Forth Ports, Cruise Operators, Cruise Forth
Passenger Services and Facilities	<ul style="list-style-type: none"> Cruise Forth volunteers provide temporary welcome facilities and onboard assistance. No permanent tourist information for Cruise Forth Volunteers. Limited signage for orientation. 	<ul style="list-style-type: none"> Limited passenger facilities. Lack of permanent facilities for volunteers. Limited orientation signage. 	<ul style="list-style-type: none"> Develop permanent information provision facility. Introduce multilingual and digital directional signage. 	<ul style="list-style-type: none"> Cruise Forth, Forth Ports, Fife Council, Transport Providers
Transport Access	<ul style="list-style-type: none"> No direct public transport from the terminal. Shuttle buses and taxis provide connections to Inverkeithing Railway Station and Dunfermline. Parking available for passengers and coaches. 	<ul style="list-style-type: none"> Reliance on shuttles and taxis creates complexity for passengers. Limited public transport connections to key attractions. Peak time congestion affects service reliability. 	<ul style="list-style-type: none"> Coordinate with transport providers to increase frequency and improve shuttle services. Develop direct public transport options to nearby attractions. Enhance communication about available transport options. 	<ul style="list-style-type: none"> Transport Providers, Forth Ports, Fife Council

Rosyth				
Category	Current Situation	Issues Identified	Recommendations	Stakeholders
Coach Access	<ul style="list-style-type: none"> Complimentary shuttle buses provide transport to Dunfermline. Ample coach parking available at the terminal. Clear road signage connects the port to major routes. 	<ul style="list-style-type: none"> Limited access for independent excursion buses. Heavy reliance on shuttle buses for passenger movement to Dunfermline. 	<ul style="list-style-type: none"> Explore options for holding areas for independent excursion buses. 	<ul style="list-style-type: none"> Forth Ports, Cruise Operators, Transport Providers
Nearby Attractions	<ul style="list-style-type: none"> Dunfermline Abbey, Pittencrieff Park, and Carnegie Birthplace Museum nearby. Culross, St Andrews, Stirling all easily accessible. 	<ul style="list-style-type: none"> Limited promotion of nearby attractions. Shuttle bus essential to access Dunfermline and other attractions. 	<ul style="list-style-type: none"> Develop and promote guided tours and shore excursions to nearby attractions. Collaborate with local attractions to align schedules with cruise arrivals to highlight local heritage and nature destinations. 	<ul style="list-style-type: none"> Cruise Forth, Fife Council, Local Tourism Partnership, Attraction Managers, Shore Excursion Agents
Impacts on the Visitor Experience	<ul style="list-style-type: none"> Industrial port setting contrasts with more scenic cruise terminals. Terminal offers basic services but lacks amenities for extended waits. Shuttle services and taxis are essential for accessing Dunfermline. 	<ul style="list-style-type: none"> Initial impressions of the port are impacted by its industrial nature. Reliance on external transportation. 	<ul style="list-style-type: none"> Explore options for improvements to visitor information provision. Enhance shuttle services to improve the experience. 	<ul style="list-style-type: none"> Forth Ports, Cruise Forth, Fife Council, Transport Providers

7.7 Air Draft Restrictions

The air draft restrictions of the Forth Rail Bridge, Forth Road Bridge, and Queensferry Crossing impact the cruise operations on the River Forth. These restrictions—ranging from 43 meters (141 feet) for the Forth Rail Bridge to 53 meters (174 feet) for the Queensferry Crossing—limit the passage of larger cruise ships with high superstructures that exceed these height clearances. As a result, such vessels cannot navigate under the bridges to access Rosyth for direct docking. Instead, these ships typically anchor off South Queensferry, where tender operations are used to transfer passengers ashore.

7.8 Coach Parking Management

Edinburgh's approach to managing coach traffic including cruise tourism coaches is being considered by the City of Edinburgh Council.

Edinburgh Coach Strategy

The City of Edinburgh Council is working towards developing a coach strategy once funding is secured. While no formal workstream is currently in place, discussions are ongoing, and meaningful progress is anticipated in 2025. Once initiated, the cruise sector will be a key stakeholder in shaping the strategy.

The Public Transport Action Plan 2030, published in April 2023, addresses the integration of various transport modes, including coach services, to improve accessibility and reduce congestion. Key initiatives include upgrading Park and Ride facilities to support fast and frequent public transport, enhancing interchange between different transport modes, and developing a mass rapid transit network. These measures aim to provide efficient alternatives to private car use, thereby managing coach traffic more effectively within the city.

City Centre Coach Parking

Cruise ship excursions place a strain on city centre parking, requiring measures to manage coach flows. Designated coach parking zones for city centre drop-offs and pick-ups are located at key points such as Regent Road, Calton Hill, and Charlotte Square. These areas provide convenient access to major attractions, but space is limited, especially during peak season. Overflow options exist but typically require prior arrangements, making advanced planning essential for excursion operators.

Regulations govern where coaches can stop and park in the city centre to ensure traffic flow is not disrupted. Key routes have timed entry permits to manage congestion, and operators must adhere to designated zones to avoid penalties. Additional drop-off and pick-up points, such as Johnston Terrace and Waterloo Place, offer access to key attractions however, these locations also have limited capacity, adding to the logistical complexity during high-demand periods.

The limited number of coach parking spaces can lead to congestion, delays, and increased costs for operators, potentially affecting the overall passenger experience and excursion timings. To address this issue, expanding designated coach parking areas or introducing a reservation system during peak periods could help improve logistics and reduce congestion.

X99 City Centre Drop off / Pick Up

The **X99 express bus service**, which operates between South Queensferry and Edinburgh city centre, providing an essential transport link for independent cruise passengers. The City Centre Drop-Off and Pick Up was on South St Andrews Street at Jenners department store, with the re-development of Jenners the location was moved to George Street near the Hard Rock Café.

South Queensferry Excursion Coach Parking

South Queensferry accommodates excursion coach parking to manage the high volume of cruise passengers visiting the area. The Shore Excursion coach parking is now well managed following an agreement between South Queensferry Community, and City of Edinburgh Council to manage congestion during peak times was agreed with the following to address the issue:

1. **Morning Operations:** Coaches used the parking area at South Queensferry (Newhalls Road) for excursions up to 103.00am after which the parking area reverts to normal parking arrangements

2. **Afternoon Operations:** Coaches Park at Bankhead Road and a call-off system operates for afternoon departures, minimizing congestion at the pier. There have been some local concerns from residents with Bankhead Road being closed without notification.
3. **Independent Excursion Operators:** There is limited space available for independent operators. The use of the B924 however this can cause additional congestion with other traffic users parking there.

Newhaven Shore Excursion Coach Parking

For shore excursions coaches at Newhaven, parking is arranged at area next to the Welsh Fishmarket, providing a designated area for excursion coaches. This location ensures a more structured and organized parking solution, reducing congestion and improving logistics for both operators and passengers.

Parking for Independent Shore Excursion operators at Newhaven is less structured and operates on a first-come, first-served basis. However, this generally does not present significant challenges, as tour operators typically use the Brewers Fayre car park, which provides a convenient and accessible option.

Calton Hill

Tour operators report challenges due to the closure of Calton Hill to traffic, which has created logistical difficulties in planning routes. They highlight that the closure limits access to a key visitor site for tours and photo opportunities. Discussions with the City of Edinburgh Council (CEC) are ongoing to explore a suitable resolution.

City of Edinburgh (Private Hire Vehicle Classification & Access Restrictions)

Currently, there is no specific Private Hire classification for independent tour operators, meaning they are categorized as private vehicles rather than commercial tour services. Operators note that this classification restricts their operational capacity. Some express concerns that increasing access restrictions across the city may make it more difficult to reach key locations, potentially affecting the visitor experience. Discussions with the City of Edinburgh Council (CEC) are underway to explore a suitable resolution.

7.9 Regional Transport Strategy Delivery Plan

The Edinburgh & South East Scotland City Region Deal and SEStran are jointly delivering the Regional Transport Strategy Delivery Plan to identify the regional transport priority projects that support the economic ambitions set out in the Regional Prosperity Framework, and the strategic goals of the Regional Transport Strategy. The Regional Transport Strategy Delivery Plan includes a strategic assessment framework to determine the priority projects to be delivered over the next ten years. The Delivery Plan will be a 'living document' to enable new projects to be assessed as the various themes of the Regional Prosperity Framework develop, to ensure that the correct transport infrastructure and services are identified to support our regional ambition.

The outcomes of the Regional Tourism priority projects will be incorporated into the Delivery Plan assessment following completion of the feasibility studies, or any subsequent development work.

For cruise tourism, aligning transport improvements with the RTSDP will enhance passenger dispersal, improve port connections, and support sustainable travel, ensuring cruise tourism benefits the wider region.

7.10 Welcome Piper

A traditional piper welcomes cruise ship passengers at each of the ports when the passengers disembark (co-ordinated by Louise Marshall). This plays an important role in creating a strong, positive first impression for cruise ship passengers arriving in Edinburgh and the South East of Scotland. The presence of a traditional Scottish piper embodies the region's cultural heritage, offering passengers an immediate and iconic connection to Scotland's history and traditions.

8. Cruise Forth

8.1 Cruise Forth Ltd

Since 2012 Cruise Forth has played a significant role in supporting cruise tourism, initially at Rosyth and then expanding to cover the ports of Leith, Newhaven and South Queensferry. Financially, its viability is supported by its partnership with various local councils and key stakeholders (e.g. Forth Ports, Lothian Buses).

Discussions were held with the Chair, Project Manager and Volunteers Chair to allow us to gather a fuller understanding of the business model and operating criteria.

The primary aim of Cruise Forth is to promote local attractions, ensure a warm welcome for cruise visitors, and facilitate easy travel and exploration of nearby areas. Volunteers play a key role, providing hospitality services like maps, travel advice, and shuttle buses, particularly at Rosyth, where passengers can take a free shuttle to Dunfermline. The project has been recognised for its efforts, including winning a VisitScotland Thistle Award for the "Warmest Welcome" in 2015.

Cruise Forth has played a pivotal role in enhancing the experience of cruise passengers visiting the region providing passengers with information about local attractions, transportation etc. There is an active business and community engagement programme of activity including business engagement workshops and briefings for businesses interested in engaging with cruise passengers. These sessions provide insights into the cruise industry and ideas and action on how local businesses can effectively engage with cruise visitors.

A key role of Cruise Forth undertaken by the Project Manager is the business engagement with local businesses, transport providers, shore excursion agents, ship agents etc in communicating information on the arrivals and departures of Cruise Ships on the days the ships are in Port.

Overview of Cruise Forth

- Incorporated 18th February 2022 as a company limited by guarantee funding of the organisation is primarily from the public sector i.e. local authorities with some contribution from key stakeholders. This positions Cruise Forth in a financially uncertain position. Current operations are time bound with financial resources allowing for 12/18 months operational activities subject to spending decisions.
- The Cruise Forth Board considered obtaining charitable status before incorporation, as it could have provided access to additional project funding sources. However, after evaluation, the Board determined that charitable status would not offer significant benefits and chose not to proceed with it.
- The Cruise Forth Board have been presented with Risk Assessment by the Project Manager on the medium to longer term impact and requirements of Cruise Forth to function sustainably and financially viable.
- The 2025 Business plan was being presented at the December Board Meeting
- The primary overhead costs for Cruise Forth is the project management fee charged. The Project Manager leads and manages all aspects of the day-to-day operations and maintains a sense of momentum with the Volunteer Group. The operation relies on delivery by the Project Manager i.e. marketing, operations, finances business engagement etc.
- Cruise Forth has been actively involved in organising seminars and conferences to support local businesses in capitalising on cruise tourism opportunities. These include:
 - **Seminar on 29th January, 2025, North Queensferry:** This event was tailored for businesses interested in developing opportunities arising from the cruise ships visiting the Forth and the Tay. The focus was on businesses offering potential shore excursions. Attendees had the chance to connect with cruise excursion representatives to explore opportunities for delivering new excursions.
 - **Cruise Forth Summit 28th January, Cruise Terminal, Leith:** The summit brought together key stakeholders to review the 2024 season and look ahead to 2025.

- **Scotland's Cruise Conference on November 21, 2024:** Held at the Glen Pavilion in Dunfermline, this conference was supported by Cruise Forth and aimed to provide insights into the cruise industry, fostering collaboration among stakeholders.
- A series of Business Engagement Workshops in Leith, Newhaven, Dunfermline, Dundee, St Andrews.
- The Business engagement workshops are being repeated in the lead up to the start of the 2025 season.
- Subject to budget availability, CruiseForth considers attending key cruise tourism industry events, such as SeaTrade Cruise Global (Miami, April 2025) and SeaTrade Europe (Hamburg, September 2025). Attendance at SeaTrade events is facilitated through Forth Ports' membership in Cruise Scotland. Cruise Forth is an associate member of Cruise Scotland.
- Not scheduled to attend any Cruise Europe events directly as not clear if any direct benefits attending these events. When participating Cruise Forth attends via Forth Ports as Cruise Forth not members of Cruise Europe.
- Forth Ports provided back-office support prior to the incorporation of Cruise Forth. This service is currently not provided and is undertaken by the Project Manager reporting into a Finance Work Group.
- The Project Managers' knowledge is extensive having built up over the years relationships with many of the cruise lines (ships personnel), Shipping Agents, Shore Excursion Operators, Transport providers etc. In essence he is the glue that holds it all together and makes it all work.
- In the longer term there will be a need to consider succession planning for the Project Manager and how to develop the role and purpose of Cruise Forth.
- Cruise Forth provides coach services from Rosyth to Dunfermline to address the lack of direct public transport options from the port. As Rosyth is a secured industrial port with no pedestrian access, passengers must rely on organised transfers to reach nearby destinations. This service ensures smooth onward travel, allowing visitors to explore Dunfermline's historic and cultural attractions while supporting the local economy. Table 9 below summarises the coaches provided by Cruise Forth for passengers travelling from Rosyth to Dunfermline.

Table 9 Rosyth to Dunfermline Coaches

Date	Ship	Capacity provided	Times	Estimated pax/crew carried	Comments
9th April	Viking Venus	2x22 seats	0930-1400	60	Shuttle provided by ship to Inverkeithing
28th April	Seabourn Venture	1x16seat	0930-1400	40	Turnaround with late notice transit passengers
26th May	Viking Saturn	2x22 seats	1000-1430	60	
31st May	Amadea	2x22 seats	0900-1800	150	Ship arrived early - 3 coaches provided to Dunfermline on the afternoon/evening of 30/5
17th June	Viking Venus	2x22 seats	0930-1400	60	
13th July	Artania	2x22 seats	0930-1700	110	
14th July	Viking Neptune	2x22 seats	0930-1700	60	
18th Aug	Amadea	2x22 seats	0930-1700	150	
23th Aug	Viking Venus	2x22 seats	0930-1400	60	
24th Aug	Sirena	2x22 seats	0930-1700	300	Ship provided extra coach
25th Aug	Sirena	2x22 seats	0930-1700	300	Ship provided extra coach
31st Aug	Amadea	3x22 seats	0900-1800	150	
4th Oct	Hamburg	1x22 seats	0930-1400	30	
Estimated Passenger Numbers				1530	
For Balmoral Turnarounds - a shuttle transfer coach to Inverkeithing Station is provided by the ship for disembarking passengers. Taxis (Over 20) are managed by Cruise Forth Volunteers to assist independent returners.					

8.2 Cruise Forth Volunteers

The Cruise Forth Volunteers is an initiative dedicated to providing a warm and informative welcome to cruise ship passengers arriving at Edinburgh's ports, including Leith, Newhaven, South Queensferry, and Rosyth. Established in 2011, the project has grown to involve over 50 volunteers who assist passengers throughout Cruise Ship Season.

In the 2024 season 54 volunteers supported just over 1000 'sessions' with average time of just over 2.5 hours each session (over 2,500 hours of volunteering in total). Individual volunteers ranged from 1 to 55 sessions, and 2 to nearly 200 hours in total. The median volunteer (attended 14 sessions for a total of 38 hours). Volunteers are located across a wide geographic spread of the region, as shown in figure 6 below.

Figure 6 Geographic locations of volunteers.



In March 2015, Cruise Forth received the Visit Scotland Thistle Award in the Warmest Welcome category, acknowledging the exceptional hospitality provided by its volunteers.

Individuals interested in joining Cruise Forth can find more information and express their interest through the Cruise Forth Web Site. By volunteering with Cruise Forth, individuals have the opportunity to share their local knowledge when meeting passengers and contribute to a positive visitor experience in Edinburgh.

Volunteer Roles and Responsibilities:

- **Passenger Assistance:** Volunteers offer guidance on local attractions, transportation options, and cultural insights, enhancing the visitor experience.
- **Onboard Hospitality Desks:** In some instances, volunteers set up information desks aboard ships, providing maps and advice to passengers before they disembark.
- **Shuttle Services:** At Rosyth, volunteers manage a courtesy shuttle service to Dunfermline providing information on board the coaches for passengers in the short transfer time to Dunfermline.

Cruise Forth Volunteers Overview

- The Cruise Forth volunteers deliver an ambassadorial welcome to cruise visitors with a group of highly motivated and passionate individuals. They are a self-constituted body with some taking on

responsibilities i.e. Chair, Secretary, Volunteer Booking Coordination, Communications etc. There is an on-line booking programme to manage the volunteer's attendance at ports. An AGM is held every year in November.

- The volunteers receive on an annual basis a relatively small contribution for uniforms, maps etc.
- Volunteers training includes health and safety at the start of the season from Forth Ports and new volunteers are trained by "the buddy system" i.e. shadowing an experienced volunteer.
- Approximately 30% of volunteers have language skills.
- A series of familiarisation visits are organised to enhance the volunteer's knowledge of the tourism product on offer. In 2024 visits were taken to Lind and Lime distillery, Dunfermline Abbey, Mimis bakehouse, Port of Leith Distillery, Enthrall Walking Tours, Edinburgh Zoo, Gleneagles in Town, Islander handbags. Visits in planning for 2025 include Mary Kings Close, Britannia, Bus tours and Falkirk.
- An online survey was made available for volunteers to complete, 29 responses were received. The full report is in The Evidence Based Report.
- Pre-Covid, Cruise Forth volunteers provided an on-ship information desk for ships from Invergordon to Edinburgh. Post Covid this facility has not been provided, primarily due to cruise ships not permitting.

On Ship Volunteer Desk

- Cruise Forth where permitted (purely on decision of the ships management) place volunteers onto the ship to engage with passengers prior to disembarking for day excursions and visits. An on-ship site visit to the Regal Princess was arranged on 5th October to observe first hand the passenger experience on board the ship prior to disembarking. The following are the observations from the visit.
 - There is limited practical space for the volunteers to display marketing collateral
 - There was a low tide on the day of the visit and the walk down to the Forth Belle (tender) was slippery
 - Transfer time to the Regal Princess circa 15 mins, it was a calm weather day and the transfer passed without any stress!
 - Volunteers have a designated area on level 4 one of the main deck areas. During the time observing circa half an hour there was steady stream of visitors engaging with the volunteers seeking information and interacting with the Volunteers.
 - Display screens are located on the vessel with information for example Welcome to South Queensferry and information on the water shuttle operation
 - Shore Agent Denholm display screen offering shoreside assistance and relevant contact details

8.3 Observations and Comments

Cruise Forth has strong capabilities in enhancing the cruise tourism experience, particularly in passenger engagement and local business promotion. While their strengths position them well to support local businesses, there are opportunities to further expand their skill set to deliver comprehensive business development programs.

Strengths in Business Engagement and Support:

1. **Local Tourism Expertise:** Cruise Forth has a solid understanding of the regional tourism landscape, connecting businesses with cruise passengers and facilitating local excursions. This is key in promoting local enterprises.
2. **Stakeholder Collaboration:** Cruise Forth serves as a key liaison between local businesses, cruise lines, shore excursion agents, Forth Ports, and transport providers. This collaboration ensures smooth operations and aligns cruise tourism with regional economic and cultural objectives.
3. **Passenger Experience:** The well-regarded volunteer program is central to Cruise Forth's success. Volunteers provide passengers with information, maps, and a warm welcome, contributing to a positive first impression and overall visitor satisfaction.

4. **Proven Track Record of Events:** Hosting seminars and conferences focused on cruise opportunities suggests Cruise Forth is capable of organising educational and networking events that align with business development goals.
5. **Sustainability Support:** By promoting local attractions, cultural engagement, and sustainable tourism practices, Cruise Forth aligns its activities with broader goals of environmentally responsible tourism.

Business Development and Support Gaps:

1. **Business Consulting Expertise:** While Cruise Forth excels in tourism facilitation, business development programs requires expertise and support in areas like financial planning, marketing strategy, digital transformation, and scaling operations. With limited resources Cruise Forth does not have the “in-house” professionals with these skills to deliver a comprehensive business development programme.
2. **Year-Round Engagement Capacity:** Given the focus on cruise seasons and volunteer-driven operations, there are challenges in delivering consistent, year-round business development support that requires ongoing mentorship and consulting.
3. **Access to Broader Economic Resources:** Business development programs often benefit from partnerships with **economic development agencies, investment networks, or training institutions**. If Cruise Forth doesn't have these established, their ability to offer comprehensive support may be limited.

Conclusion:

Cruise Forth holds a critical position in Edinburgh and the South-East of Scotland's cruise tourism landscape. By addressing resource constraints, defining a strategic role, and fostering partnerships with specialized agencies, Cruise Forth can maximize passenger satisfaction, strengthen local economies, and position the region as a leader in sustainable, high-value cruise tourism. With the right investments and strategic focus, Cruise Forth has the potential to transform from a key operational player into a central force driving the growth and sustainability of cruise tourism in the region.

Recommendations for an enhanced role for Cruise Forth are detailed in Chapter 18.2.1.

9. Economic Impact Analysis Summary

Cruise tourism is an important contributor to Edinburgh and the South East of Scotland’s visitor economy, leveraging its five key ports—Leith, Rosyth, Newhaven, South Queensferry, and Eyemouth—to attract transit and turnaround passengers. The sector supports local businesses through visitor spending on tours, dining, and shopping, while also creating jobs and driving infrastructure development.

Purpose of the economic impact assessment

An Economic Impact Assessment (EIA) is a tool used to evaluate the economic implications of a project, policy, event, or activity. Its primary purpose is to measure the direct, indirect, and induced economic effects on a community, region, or broader economy.

By providing a detailed and objective analysis, an EIA helps to ensure that policies can align with broader economic goals and deliver measurable benefits to communities and economies

The purpose of this analysis was to estimate the gross spend of visitors to the locale arriving by cruise liner; this included both passengers and crew. There have been multiple value reported for the value of cruise visitor spend – this analysis is based on primary research conducted in the locale. The evidence base is of the highest quality.

The following are summaries of the Passenger and Crew Spend and the Business to Business Spend. The full Economic Impact Analysis is in The Evidence Based Report.

9.1 Passenger and Crew Spend

The following is a summary of the passenger and crew spend

Visitor Spend

The gross expenditure in the study area is estimated at:

Passenger expenditure onshore	£8.2M
Passenger expenditure layover (low)	£2.9M
Passenger expenditure layout (high)	£5.8M
Total (low)	£11.1M
Total (high)	£14.0M

We estimate expenditure by spend category at:

F&B, local	£4.1M
Shopping, local	£2.9M
Accommodation (low)	£2.9M
Accommodation (high)	£5.8M
Travel	£0.5M
Leisure and attractions	0.4M
Shopping, chain	£0.2M
F&B, chain	<£0.1M

Assuming 248,000 passenger days in 2024, this is an average spend in the locale of between £44.75 and £56.45 per individual. Analysis indicates over 95% of expenditure is retained by local operations and services. The minimum net economic impacts associated with this expenditure is shown in table 10.

Table 10 Estimates of net economic impacts: Visitors

	Employment (FTE)	Earnings (£M)	GVA (£M)
Direct and indirect	167	4.6	7.8
Induced	18	0.6	1.6
Total	186	5.2	9.4

Note: this analysis does not capture the impact of visitors who arrive at other Scottish ports (e.g. Greenock Ocean Terminal) and are transported to the Edinburgh locale on excursions.

Crew Spend

At a gross level, based on the number and capacity of vessels that have visited, we estimate the gross expenditure of crew at £0.5M per annum. We estimate expenditure by spend category at:

Shopping, local	£0.3M
F&B, local	£0.1M
Shopping, chain	<£0.1M
F&B, chain	<£0.1M
Travel	<£0.1M
Leisure and attractions	<£0.1M

This analysis indicates over 85% of expenditure is retained in the local economy. The net economic impacts associated with this expenditure is shown in table 11.

Table 11. Estimates of net economic impacts: Crew

	Employment (FTE)	Earnings (£K)	GVA (£K)
Direct and indirect	5.5	137.7	218.1
Induced	0.6	18.9	47.3
Total	6.0	156.7	270.3

Net impacts visitor and crew spend

The minimum economic impact of the spend of passengers and crew in and around Edinburgh is shown in table 12.

Table 12. Estimates of net economic impacts: Total

	Employment (FTE)	Earnings (£M)	GVA (£M)
Direct and indirect	173	4.7	8.1
Induced	19	0.6	1.7
Total	192	5.3	9.7

9.2 Business to Business Spend

Primary research with a range of service providers was conducted, including port and harbour operators, shipping agents, and tour and transport operators. Data was provided on their direct expenditure across categories. Data has been anonymised to protect commercial sensitivities.

Gross and net economic impacts have been calculated, including employment, earnings and GVA of the estimated spend.

The following is a summary of the passenger and crew spend

The gross expenditure in the study area is estimated at **£19.9M**:

Port and harbour services	£12.6M
Tours and transport	£6.9M
Resupply	£0.5M

Net impacts business to business spend.

The minimum net economic impacts associated with this expenditure is shown in table 13.

Table 13. Estimates of net economic impacts: Business to business

	Employment (FTE)	Earnings (£M)	GVA (£M)
Direct and indirect	228	9.1	12.5
Induced	43	1.3	2.8
Total	271	10.4	15.3

9.3 Economic Findings and Conclusions

Table 14 shows the minimum projected net economic impacts associated with B2C and B2B expenditure of £31.0M.

Table 14. Estimates of net economic impacts: Total

	Employment (FTE)	Earnings (£M)	GVA (£M)
Direct and indirect	401	13.8	20.6
Induced	62	1.9	4.5
Total	463	15.7	25.1

Key metrics

Based on 248,000 passengers, conservative key net metrics are:

Spend per passenger	£44.75
Output per passenger	£125.40
GVA per passenger	£101.21
Employment per 1,000 passengers	1.87 FTE (direct, indirect and induced)

Note: These values could be understated due to visitors on turnaround ships who stay in Edinburgh tending to stay in higher quality hotels. In peak season Booking.com notes the average room rate for a 4-star hotel in Edinburgh at £226 per night, with a 5-star hotel at £316 per night.

9.4 Cruise Tourism Contribution to Edinburgh and South-East Scotland Tourism²⁰

Cruise tourism is a growing sector within Scotland's broader visitor economy, but its relative contribution remains small compared to other tourism sources such as domestic and international overnight stays. In the context of Edinburgh and the South East of Scotland (which includes Edinburgh, the Lothians, Fife, and the Scottish Borders). The value of tourism to the region as reported by VisitScotland is as follows:

Regional Data:

- The reported visitor spend figures for Edinburgh and the Lothians (£2.3B), Scottish Borders (£0.1B), and Fife (£0.6B) sum to £3.0B, but further estimates suggest a broader regional total of £3.8B when incorporating South of Scotland figures.
- The distinction between VisitScotland and Scottish Borders Council data suggests that VisitScotland may report only a subset of total tourism activity.

National Growth and 2024 Projections:

- Based on Office of National Statistics (ONS) data, international visits to Scotland increased 14% in early 2024 vs. 2023 and 46% vs. 2019.
- Assuming similar growth trends in regional tourism expenditure, an estimated total spend of £4.0B to £4.3B in 2024 appears reasonable.

Cruise Tourism's Contribution:

- Estimated cruise visitor expenditure for 2024 is £15M.
- This represents 0.3% to 0.4% of total visitor spend in the regions, suggesting that while cruise tourism is a growing niche, its financial impact remains relatively small compared to other tourism sectors.

While cruise tourism adds value to Edinburgh and South-East Scotland's visitor economy, its economic impact remains modest compared to the broader tourism sector. Ongoing infrastructure developments and policy discussions reflect efforts to manage and enhance the benefits from this niche market.

²⁰ No detailed survey of regional tourism expenditure has been undertaken. The estimates provided are based on available data from VisitScotland and other publicly reported sources. Figures should be considered indicative rather than definitive.

10. Community Impact Assessment

10.1 Introduction

To conduct the community impact assessment, a stakeholder mapping session was initially conducted to identify relevant organisations in the four communities of interest: Leith, South Queensferry, Newhaven; and Rosyth. This activity highlighted the following community organisations:

- South Queensferry and District Community Council
- Rosyth Community Council
- Heart of Newhaven
- Leith Trust and Leith Community Fund
- Leith Civic Trust
- Leith Harbour and Newhaven Community Council
- Newhaven Heritage
- Cruise Forth Volunteers.

These community organisations were approached and invited to a consultation discussion via email. The following organisations responded to this correspondence and were subsequently consulted:

- Newhaven Heritage
- Trinity Community Council (identified during consultation process)
- South Queensferry Community Development Trust
- Leith Trust and Leith Community Fund
- Heart of Newhaven
- Leith Harbour and Newhaven Community Council.

Five questions with follow-up probes were used to guide discussion:

- What are your current perspectives of the cruise industry?
- Do you see any economic benefits or negative impacts at a community level?
- Should communities be included in cruise-related activity?
 - What would that look like?
 - If not, why?
- Does the community face any pressures or challenges from the cruise industry?
- Are you aware of any local cultural impacts of the cruise industry?

10.2 Analysis

Qualitative analysis was conducted on the output of these consultations. These are summarised into the following four categories and are summarised below. The Evidence Based Report 19.13 provides additional detail.

- Current perspectives of the cruise industry
- Pressures and challenges from the cruise industry
- Economic benefits and challenges
- Cultural impacts.

1. Current Perspectives on the Cruise Industry

- **Strengths:**
 - Cruise tourism is seen as an economic driver with opportunities to attract visitors to local businesses.
 - Scenic and historical assets, such as heritage and industrial history, offer unique visitor experiences.
 - Strong partnerships, like those with Cruise Forth, provide valuable resources for communities and businesses.
- **Challenges:**
 - Many visitors bypass local areas, limiting economic benefits for smaller communities.

- Environmental concerns and inadequate infrastructure, such as parking and narrow pavements, create strain during cruise calls.
- **Opportunities for Improvement:**
 - Enhanced signage, local marketing, and unique offerings like heritage walks could attract more visitors to areas like Newhaven and South Queensferry.

2. Pressures and Challenges from the Cruise Industry

- **Infrastructure Strain:**
 - Limited parking and congestion at piers disrupt pedestrian and vehicular flow.
 - Leith's tram system has alleviated some pressure, but other areas face significant challenges.
- **Community Frustrations:**
 - Gaps in communication among stakeholders contribute to dissatisfaction and a lack of community involvement.
 - Volunteers play a vital role but require better support and facilities.
- **Improvements Needed:**
 - Upgraded visitor amenities, better traffic integration, and enhanced public awareness of cruise activities could alleviate pressures.

3. Economic Benefits and Challenges

- **Economic Impacts:**
 - Cruise tourism boosts trade in areas like South Queensferry but is often limited by passengers' reliance on prearranged tours.
 - Smaller businesses see minimal benefit compared to major attractions like the Royal Yacht Britannia.
- **Opportunities for Growth:**
 - Develop strategies to spread economic benefits across regions and support smaller businesses.
 - Foster partnerships between the cruise industry and local businesses for targeted marketing.
 - Initiate job training programs tailored to cruise tourism.

4. Cultural Impacts

- **Missed Opportunities:**
 - Limited cultural exchange between visitors and locals due to the "hub-and-spoke" model of cruise visits.
 - Infrequent engagement with local culture, despite positive responses when exchanges occur.
- **Recommendations:**
 - Collaborate with cruise operators to create cross-cultural connections.
 - Invest in public art and rejuvenate neglected areas to reflect local pride.
 - Promote Newhaven and South Queensferry as tourism destinations with emphasis on their unique heritage and culture.

11. Shore Excursions

Shore excursions are pre-arranged onshore tours and activities designed for cruise ship passengers to enjoy while their ship is docked at a port. These excursions offer passengers the opportunity to:

- Explore local attractions such as historical landmarks, natural wonders, or iconic sites.
- Engage in cultural experiences like local cuisine, traditional performances, or guided museum tours.
- Participate in recreational activities, including adventure sports, wildlife encounters, or scenic tours.

Shore excursions are tailored to enhance the overall cruise experience by providing passengers with an immersive glimpse into the destination's unique offerings.

11.1 Shore Excursion Options for Cruise Passengers

Cruise passengers have three primary options for organizing their shore excursions, each catering to different preferences, budgets, and levels of customization:

1. Shore Excursion Companies (Cruise Line Appointed)

Overview: These companies are officially appointed by cruise lines after a competitive bidding process.

- **Role and Services:**
 - Act as ground handlers for all excursions on the cruise line's program.
 - Develop a range of excursion options tailored to the cruise line's passenger profile and interests.
 - Handle logistics, including contracting with coach companies, guides, and local attractions.
 - Manage on-quayside operations during the ship's port stay.
- **Advantages:**
 - Convenient for passengers, as excursions are pre-arranged and coordinated directly with the cruise line.
 - Includes guarantees, such as ship waiting policies if excursions are delayed.
- **Disadvantages:**
 - Often more expensive than independent or local options.

2. Shore Excursion Companies (Independent)

Overview: These companies operate independently and compete with cruise line-appointed programs.

- **Role and Services:**
 - Track cruise itineraries and offer excursions bookable in advance, often at lower prices.
 - Provide similar tours to those offered by appointed companies but with potential cost savings.
- **Logistics:**
 - Arrange meeting points sometimes outside the port perimeter as they cannot access the quayside.
- **Advantages:**
 - Lower cost and potentially unique or less-commercialized experiences.
- **Disadvantages:**
 - Lack of cruise line guarantees, such as the ship waiting if passengers return late.
 - Requires passengers to arrange their own transport to the meeting point.

3. Local Tour Companies

Overview: Passengers independently book tours directly with local operators, much like any other visitor.

- **Options:**
 - **Private Tours:** Tailored itineraries for small groups, often offering personalized experiences.
 - **Fixed Departure Tours:** Pre-scheduled tours with set routes and departure times.

- **Booking Platforms:**
 - Passengers can browse local destination websites or popular platforms like Viator or GetYourGuide to find tours.
- **Advantages:**
 - Greater flexibility and customization.
 - Often highlights lesser-known attractions or provides deeper local insights.
- **Disadvantages:**
 - Requires more effort to research and coordinate.
 - No guarantees related to the cruise schedule.

4. Impacts on the Visitor

- **For Passengers:**
 - Experiences that highlight the destination's culture and natural beauty.
 - Hassle-free exploration with transportation and logistics managed by the operator.
 - **Convenience:** Cruise-appointed options offer the least hassle, while local tours require more planning.
 - **Cost:** Independent and local tours may provide better value for budget-conscious travellers'.
 - **Flexibility:** Local tour companies excel in offering personalized experiences.
- **For Destinations:**
 - Boosts tourism revenue and supports local businesses.
 - Encourages infrastructure and service development to accommodate cruise tourism.
 - High volumes of cruise passengers can overcrowd popular attractions, affecting both the visitor experience and local communities.
 - Activities may strain natural resources or ecosystems if not managed sustainably.
 - Delays in tendering or transportation can disrupt schedules.
 - Language barriers or unclear instructions may cause confusion.

11.2 Shore Excursion Agents Edinburgh

Cruise Line Appointed

The following are the Cruise Line appointed Shore Excursion Agents providing the excursions in Edinburgh and surrounding areas.

Here are brief descriptions of the specified shore excursion companies:

- **European Cruise Service** <https://www.europecruise.no>: European Cruise Service is a leading provider of shore excursions and port services across Northern Europe. They offer a wide range of tours tailored to cruise passengers, focusing on delivering authentic and memorable experiences in various European destinations.
- **Intercruises Shoreside & Port Services** <https://www.intercruises.com>: Intercruises specializes in providing comprehensive services to the ocean and river cruise industry, including shore excursions, turnaround operations, port operations, and hotel programs. With a global presence, they deliver diverse and memorable experiences for cruise passengers worldwide.
- **Communications & Destinations Ltd:** A UK-based company specializing in creating unique and inspirational experiences for both cruise and corporate clients. They offer high-quality cruise services, including shore excursions, turnarounds, private arrangements, group transfers, and pre- and post-cruise programs throughout the UK and British Isles.
- **Excursions Ltd** <https://www.excursions.co.uk>: Founded in 1999, Excursions Ltd is a UK-based company renowned for crafting unforgettable travel experiences. They offer bespoke, innovative, and sustainable tours meticulously researched to benefit local communities while respecting wildlife and the environment.

- **Vivu Journeys** <https://vivujourneys.com>: Vivu Journeys is a destination management company offering immersive and authentic travel experiences across various destinations. They focus on providing culturally rich journeys that connect travellers with local communities and traditions. They are a newer entrant into the Edinburgh scene and provide the ground handling support for Povant Cruises.
- **Destinations and Experiences**: Destinations and Experiences is a company that specializes in experiences, focusing on cultural immersion and authentic local interactions. They offer a range of services tailored to enhance travellers' understanding and enjoyment of the destinations they visit.
- **Akorn Destination Management** www.akorndmc.com: A new division of Abercrombie & Kent the global leader in luxury travel providing tailor-made itineraries and on-the-ground services for tour operators, cruise lines, and travel professionals with high-quality and innovative travel experiences worldwide. Akorn have been appointed by Ritz Carlton to deliver the Shore Excursion in Scotland in 2025.

Independent Shore Excursion Companies and Local Tour Companies

There are several independent shore excursion companies providing a service in and around Edinburgh, The Evidence Based Report provides a short summary of a variety of the operators.

11.3 Shore Excursion Tours

Cruise lines appoint shore excursion agents to provide a diverse array of tours in Edinburgh and its surrounding areas, catering to various interests and experience for passengers. Passengers can select from a curated selection of tours showcasing Edinburgh and its environs, tailored to diverse interests and activity levels. Information on the available tours although available on Cruise Line websites has been difficult to come back due to commercial confidentiality, time resource to provide the information.

Cruise lines collaborate with shore excursion agents to offer a variety of tours in Edinburgh and its surrounding areas, catering to diverse passenger interests and activity levels. While specific details about these tours are often available on Cruise Line website, accessing the information from Shore Excursion Agents has been difficult from a perception of commercial confidentiality or having the time to provide us with the information.

Cruise Forth have provided a list of the regular excursions, less regular, new excursions and exclusive excursion as follows:

Regular Excursions:

- Edinburgh City Tours: Guided explorations of iconic landmarks such as Edinburgh Castle²¹, the Royal Mile, and the Palace of Holyrood house.
- Braveheart and Stirling Castle: Visits to the historic Stirling Castle and NTS Bannockburn attraction.
- Rosslyn Chapel and Melrose Abbey: Tours focusing on the architectural and historical significance of these renowned sites.
- St Andrews: Journey to the historic town of St Andrews, some shore excursions to St Andrews are specifically to play golf.
- Falkirk Wheel and the Trossachs
- Rosslyn Chapel
- St Andrews
- Glamis and St Andrews
- Leisurely Edinburgh/On your own/ Royal Mile Walk

Less Regular Excursions:

- Outlander Filming Locations: Visits to various locations featured in the "Outlander" series, including Culross and Doune Castle.
- Linlithgow and South Queensferry
- Hopetoun House and Edinburgh
- Scone Palace

²¹ Note: Edinburgh Castle ticket sales are restricted and an organised shore excursion includes a ticket entry

- Trossachs Panorama
- Mary Kings Close
- Floors Castle and Dryburgh Abbey
- Antonine Wall
- Museum

New Excursions:

- Go Local – Two of Scotland’s Best (Whisky Tasting –Bagpipes)
- Undiscovered Edinburgh (Stockbridge)
- Edinburgh Art Walk
- A Taste of Scotland
- Electric bike tours of Edinburgh
 - EZ Bike Tours located in Newhaven provides environmentally friendly electric bike tours of Edinburgh
 - The German Cruise Ship Aida provides electric bike tour of Edinburgh, they provide the bikes and guides for up to 30 passengers

Exclusive Excursions:

- Private Guided Tours: Tailored experiences with personalized itineraries, including luxury transportation and expert guides. To the following:
 - The Royal Yacht Britannia – Private Tour
 - Broomhall House
 - Royal Edinburgh Military Tattoo
 - Johnnie Walker Experience

11.4 Shore Excursion Agents Tours

Information on Shore Excursions provided by European Cruise and Inter cruises are detailed in the table below. The information provided indicates the high level of uptake for the variety of Edinburgh tours offered.

Table 15 European Cruise - Tours Offered in Edinburgh/River Forth by Most Popular:

Tour	Duration	Number of Coaches Run 2024
Edinburgh on your own	Full Day	59
Edinburgh Panoramic & Free Time	Half Day	54
Magnificent Edinburgh, city and castle	Half Day	49
Panoramic Trossachs	Half Day	12
Edinburgh Castle & Holyrood Palace	Full Day	9
Stirling Castle	Half Day	8
Edinburgh Panoramic and Holyrood House	Half Day	6
Edinburgh's Coast & Countryside	Half Day	5
Edinburgh & Rosslyn Chapel	Half Day	4
Military Tattoo	Half Day	4
Walking tour of the Royal Mile	Half Day	4
Edinburgh castle, and the Royal Yacht Britania	Full Day	3
Falkirk Wheel Boat Experience	Full Day	2
A Taste of Scotland (Scotch Whisky Experience)	Half Day	2
Edinburgh City Zoo & Panoramic	Full Day	1
Golf Tour - Dalmahoy	Full Day	1
Lecturer: Private Edinburgh	Full Day	1
Lecturer: Greywalls House & Garden	Full Day	1
Edinburgh Art Walk	Half Day	1
Johnnie Walker's Edinburgh	Half Day	1

Port calls handled by European Cruises in Edinburgh in 2024 were 17, the total number of coached operated for these was 227.

Table 16 Intercruise – Tours offered on one specific day in 2024

Tour Name	Start time	End time	Ad	Paxes	Bus capacity	Lang
Glamis Castle & St. Andrews	08:15	16:30	49	49	49	English
Best of Edinburgh	09:30	18:15	47	48	49	English
Braveheart Country & Stirling castle	09:00	13:30	41	44	45	English
Edinburgh, Floors Castle & Dryburgh Abbey	07:45	17:00	42	44	45	English
Glamis Castle & St. Andrews	08:15	16:30	47	47	49	English
Best of Edinburgh	09:30	18:15	46	46	49	English
Edinburgh Castle & City Drive	13:45	18:15	44	46	49	English
Edinburgh Castle & City Drive	08:30	13:00	45	45	49	English
Edinburgh Castle & City Drive	13:45	18:15	43	44	49	English
Edinburgh City drive & Time on your own	09:45	15:45	48	48	53	English
Edinburgh Castle & City Drive	08:30	13:00	43	43	49	English
Edinburgh City drive & Time on your own	09:45	15:45	47	47	53	English
Edinburgh City drive & Time on your own	09:45	15:45	45	46	53	English
Edinburgh on your own	10:30	18:00	45	46	53	English
Edinburgh City drive & Time on your own	09:45	15:45	43	45	53	English
Edinburgh Castle & City Drive	08:30	13:00	34	39	49	English
Edinburgh City drive & Time on your own	09:45	15:45	37	39	49	English
Mary King's Close	08:30	13:00	30	30	40	English
St. Andrews - Home of Golf	14:00	18:30	42	42	53	English
St. Andrews - Home of Golf	14:00	18:30	42	42	53	English
Royal Mile Walking Tour	08:15	12:30	35	36	49	English
St. Andrews - Home of Golf	14:00	18:30	43	43	57	English
Edinburgh on your own	10:30	18:00	32	34	49	English
Edinburgh on your own	08:00	15:30	35	36	53	English
St. Andrews - Home of Golf	14:00	18:30	40	40	57	English
Braveheart Country & Stirling Castle	13:45	18:15	38	38	57	English
Easy Edinburgh & National Museum	08:45	13:15	34	34	53	English
Local Connections: Whisky & Bagpipes with local ex	09:15	12:45	25	25	45	English
Edinburgh on your own	08:00	15:30	27	27	49	English
Easy Edinburgh & National Museum	08:45	13:15	27	29	53	English
Easy Edinburgh & National Museum	14:00	18:30	27	28	53	English

12. Visitor Dispersal

The effective dispersal of cruise ship passengers beyond well-known destinations like Edinburgh, Dunfermline, and St Andrews—particularly for those opting for independent excursions—requires careful consideration of several barriers that may hinder the development of wider regional opportunities. These barriers include logistical challenges, such as limited transport connectivity, infrequent services, and scheduling constraints that make it difficult for passengers to explore more remote areas within the limited time ashore.

Passenger preferences for familiar, high-profile sites (e.g. Edinburgh Castle, Royal Yacht Britannia, Roslyn Chapel, Dunfermline Abbey etc) and a tendency to choose convenient, pre-arranged tours also play a role in limiting dispersal. Additionally, gaps in regional infrastructure, limited marketing of lesser-known attractions, and a lack of coordinated, easily accessible visitor information can further restrict the movement of passengers to outlying areas, reducing the potential economic and cultural benefits for the broader region.

Encouraging visitor dispersal requires a coordinated effort across transport, marketing, and local partnerships to create appealing alternatives that draw cruise passengers to new destinations beyond Edinburgh's iconic attractions.

The barriers include:

1. Transportation and Accessibility Challenges

- **Limited Public Transport Options:** Many lesser-known areas lack frequent and reliable public transportation connections from cruise ports, making it difficult for independent travellers to venture further afield.
- **Complex Transfers:** The need to transfer multiple times (e.g., from port shuttles to buses or trains) can deter passengers who prefer simple, direct routes. Ports like Rosyth have poor connectivity to train stations and city centres.
- **High Transport Costs:** Taxi fares or private transfers to more remote destinations can be expensive, discouraging budget-conscious passengers.
- **Congestion at Key Access Points:** Even when alternative destinations are promoted, transport hubs can become overcrowded, particularly during peak cruise season deterring exploration due to potential time constraints.

2. Time Constraints and Perceived Risk

- **Tight Shore Leave Windows:** Cruise passengers often have only 4-6 hours ashore, limiting their willingness to travel far from the port due to fear of missing the ship's departure.
- **Risk Aversion:** Many passengers prefer cruise-organized excursions because they guarantee a return to the ship on time. Independent excursions lack this safety net, making passengers hesitant to explore on their own.
- **Tendering Delays:** Newhaven and South Queensferry use tender boats to bring passengers ashore, adding uncertainty and time delays, which can discourage longer independent trips.

3. Passenger Demographics and Preferences

- **Older Passenger Demographics:** Many cruise passengers are older travellers who may prefer organised tours over navigating new transport systems independently.
- **Preference for Familiar Experiences:** Passengers may gravitate toward iconic, recognisable landmarks that offer a sense of familiarity and assurance, avoiding less-known areas that may feel more unpredictable.

4. Limited Information and Promotion

- **Limited Onboard Promotion of Alternatives:** Cruise lines and shore excursion agents tend to promote established, high-volume destinations, leaving smaller or off-the-beaten-path areas underrepresented in brochures and onboard announcements.
- **Lack of Awareness:** Passengers may be unaware of the richness and diversity of experiences beyond Edinburgh, St Andrews, and Dunfermline due to limited marketing and visibility of these areas.
- **Fragmented Marketing Efforts:** Without a coordinated marketing strategy that highlights a range of regional experiences, passengers may default to well-known sites promoted by the cruise lines.
- **Travel Trade Ready Experiences:** Cruise lines and excursion operators require partners who understand travel trade expectations—such as competitive pricing, reliable scheduling, and standardised service levels. Businesses must be equipped to deliver consistent, professional experiences that meet these criteria.

12.1 Cruise Visitor Behaviour and Regional Opportunities

Understanding cruise visitor behaviour, particularly regarding travel time limits and preferences, is essential for identifying regional opportunities and interventions that enhance passenger experiences while promoting economic benefits across South-East Scotland. Typically, cruise passengers prefer excursions that do not exceed 90 minutes of travel time each way, balancing their desire to explore with the need to return to the ship on schedule. This travel window offers numerous opportunities to promote destinations beyond Edinburgh while ensuring accessibility and passenger satisfaction.

Cruise Visitor Behaviour Considerations

Table 17 Cruise Visitor Behaviours

Behaviour/Preference	Implication for Regional Opportunities
90-Minute Travel Limit	Destinations within a 90-minute radius of Leith, Rosyth, Newhaven, South Queensferry, and Eyemouth are opportunities for cruise excursions.
Desire for Authentic Experiences	Passengers increasingly seek unique, culturally rich, and immersive experiences that go beyond standard tourist sites.
Interest in Nature and Wildlife	Expedition ships and eco-conscious passengers prioritize destinations that offer wildlife encounters, scenic landscapes, and nature-based activities.
Preference for Smaller Group Tours	Many passengers prefer intimate, off-the-beaten-path experiences that allow for deeper cultural connections and personalized exploration.
Growth in Independent Travelers	An increasing number of passengers prefer self-guided tours or flexible excursions, requiring reliable transport links and accessible information.
Expedition Ship Trends	Expedition cruises are on the rise, with passengers seeking more adventurous, educational, and environmentally focused itineraries that highlight unique landscapes and natural heritage.

Regional Opportunities Within the 90-Minute Radius

By understanding cruise visitor behaviour and reducing barriers to dispersal, the region can unlock new economic opportunities and ease pressure on popular sites like Edinburgh and St Andrews. Improved transport, targeted interventions, and collaboration with shore excursion operators will encourage passengers to explore attractions across the region. This approach supports sustainable tourism while enriching visitor experiences.

The following table of experiences highlights a selection of attractions identified through local knowledge, industry input, and consultation with stakeholders, showcasing the diverse opportunities available within a 90-minute travel radius. While not exhaustive, these examples illustrate the variety of cultural, historical, and nature-based experiences that can be developed into compelling shore excursions. By expanding and

refining these offerings, the region can create distinctive visitor experiences that distribute economic benefits more widely while ensuring sustainable tourism growth

Table 18 Potential Regional Shore Excursions

Destination	Opportunity	Activity
Scottish Borders	<ul style="list-style-type: none"> Promote Abbotsford House, Melrose Abbey, and Jedburgh Abbey for literary and historical excursions. 	Enhance marketing efforts targeting cruise lines, improve signage and visitor facilities, and create bundled heritage tours with nearby attractions like Roslin Chapel.
Eyemouth & Berwickshire Coast	<ul style="list-style-type: none"> Promote Gunsgreen House, and St. Abbs Head National Nature Reserve for coastal history and wildlife experiences. 	Develop walking tours focusing on maritime heritage, partner with local seafood businesses, and create eco-friendly excursions for smaller, expedition-style cruise ships.
East Lothian	<ul style="list-style-type: none"> Highlight Nature Reserves (e.g., John Muir Country Park), Tantallon Castle, and North Berwick for wildlife and coastal scenery. 	Develop nature-focused excursions, promote wildlife watching tours (e.g., puffin spotting), and collaborate with local eco-tourism operators.
Pentland Hills Regional Park	<ul style="list-style-type: none"> Offer hiking and nature walks for passengers interested in outdoor adventure, birdwatching, and scenic photography. 	Create guided eco-tours and ensure safe, accessible transport options from ports to trailheads.
Dunfermline, Perth, Stirling	<ul style="list-style-type: none"> Develop an exclusive “Scottish Kings & Legends” tour package for shore excursion operators. 	Working with Shore Excursion Agents develop Luxury coach transport & guided excursions with exclusive behind-the-scenes access to historic sites and expert-led storytelling combined with a Scottish food & drink experiences(Afternoon tea at Scone Palace)
Isle of May & Coastal Wildlife	<ul style="list-style-type: none"> Leverage the Isle of May for puffin watching and marine wildlife tours, catering to expedition and eco-tourist passengers. 	Collaborate with boat operators to provide sustainable wildlife tours, improve visitor information at ports, and market the island as a unique natural attraction.
Forth Valley & Stirling	<ul style="list-style-type: none"> Explore Stirling Castle, the Wallace Monument, and Battle of Bannockburn Visitor Centre for history-focused excursions. 	Coordinate with shore excursion agents to bundle Stirling with Falkirk or Fife sites, and improve transport scheduling to accommodate cruise ship itineraries.
South Queensferry & Linlithgow	<ul style="list-style-type: none"> Beyond the Forth Bridges, promote Linlithgow Palace, Blackness Castle, House of Binns and Hopetoun House for architectural and royal history experiences. 	Improve transport links and signage, develop bundled heritage itineraries with South Queensferry’s attractions, and market lesser-known heritage sites.
Midlothian & East Lothian	<ul style="list-style-type: none"> Develop an exclusive History and Heritage excursion to East and Midlothian - Dalkeith Country Park, Newhailes, Roslyn Chapel, Glenkinchie Distillery, Seabird Centre, Belhaven Brewery etc. 	Working with Shore Excursion Agents develop luxury coach transport & guided excursions with exclusive behind-the-scenes access to Restoration Yard, Newhailes and Roslyn Chapel with expert-led storytelling combined with a

Destination	Opportunity	Activity
		Scottish food & drink experiences (Afternoon tea at Newhailes).
Falkirk and West Lothian	<ul style="list-style-type: none"> Leverage attractions like e.g. the Falkirk Wheel, The Kelpies, and The Helix Park, Rosebank Distillery, House of Binns, Linlithgow Palace to attract cruise visitors for unique engineering and heritage experiences. 	Develop combined cultural and outdoor itineraries, improve transport connections from ports, and promote Falkirk and West Lothian's unique landmarks to cruise excursion companies.

Shore Excursion Package Development for Edinburgh and the South East of Scotland

The development of shore excursion packages for Edinburgh and the South East of Scotland requires a coordinated approach among key stakeholders to create high-quality, sustainable visitor experiences that align with the needs of cruise passengers and the region's tourism strategy.

Key Stakeholders Responsible for Shore Excursion Development

1. Cruise Forth

- Cruise Forth currently facilitates local businesses engagement with cruise lines and shore excursion agents helping develop high-quality, sustainable shore excursions. Additional resources required to enable Cruise Forth support businesses to become Cruise Tourism ready.

2. Cruise Lines & Shore Excursion Teams

- Cruise operators have dedicated shore excursion teams that select, approve, and market excursions to passengers.
- These teams work with local partners to ensure smooth logistics, safety compliance, and passenger satisfaction.

3. Shore Excursion Agents

- Shore excursion agents play a critical role in curating, coordinating, and delivering high-quality, seamless experiences for cruise passengers. Acting as intermediaries between cruise lines and local tourism providers, they ensure excursions meet operational, safety, and customer satisfaction standards.

4. Local Businesses & Experience Providers

- Local businesses and experience providers enhance shore excursions by offering engaging, time-sensitive experiences tailored to cruise passengers. Their key roles include:
 - Creating tailored tours that fit cruise schedules and visitor interests.
 - Collaborating with tour operators to integrate their offerings into excursion packages.
 - Managing capacity & accessibility to ensure smooth visitor flow.
 - Enhancing visitor experience with expert guides and interactive elements.
 - Promoting sustainable tourism through eco-friendly and community-focused initiatives.

13. Environmental and Sustainability Challenges

Cruise tourism often faces negative perceptions due to its potential environmental impact from ships, and the pressure it can place on local infrastructure and communities. High passenger volumes can lead to overcrowding, affect residents' quality of life, and reduce the visitor experience. There are also concerns about limited economic benefits if passengers spend little time or money ashore. These issues highlight the need for a responsible tourism approach to manage cruise tourism sustainably and balance its benefits with its impact.

The Cruise Passenger Management Plan needs to focus on responsible tourism to manage the environmental, social, and economic impacts of cruise tourism sustainably. While some aspects are beyond local control, aligning regional efforts with sustainable practices can maximize the benefits for Edinburgh and the South East of Scotland.

By implementing strategic actions, Edinburgh and the South East of Scotland can establish itself as a recognized leader in sustainable and responsible cruise tourism. This involves adopting practices that minimize environmental impact, promote cultural preservation, and enhance the well-being of local communities. Through innovative approaches, collaboration with industry stakeholders, local community engagement, and a focus on long-term sustainability, the region can ensure that cruise tourism contributes positively to its economy while safeguarding its natural landscapes, historic sites, and the quality of life for residents. These efforts will position the region as a forward-thinking destination, balancing tourism growth with the preservation of its unique identity for future generations.

The following actions outline an approach to working towards achieving sustainable and responsible cruise tourism in Edinburgh and the South East of Scotland, ensuring a positive balance between economic growth, environmental preservation, and community well-being.

1. Low-Impact Transport and Mobility

- **Electric and Hybrid Transport:** Promote the use of low-emission buses, electric shuttles, and taxis for passenger movement.
- **Active Travel Options:** Develop walking and cycling-friendly routes to encourage sustainable exploration of Edinburgh.
- **Crowd-Free Connections:** Introduce scheduled shuttle services to minimize congestion in high-traffic areas.

2. Responsible Excursions and Visitor Flow Management

- **Promote Local Experiences:** Encourage visits to less crowded or off-the-beaten-path destinations to reduce pressure on major tourist spots.
- **Sustainable Excursions:** Partner with local operators to create eco-friendly tours that highlight Edinburgh and the region's natural and cultural heritage.
- **Timed Entries for Attractions:** Use reservation systems to control visitor numbers at popular sites, ensuring better preservation and visitor experience.

3. Community-Centric Initiatives

- **Support Local Businesses:** Encourage passengers to shop at local markets, dine at independent restaurants, and use local service providers.
- **Cultural Education:** Provide passengers with information on Edinburgh's culture, history, and sustainable travel tips to promote respectful and meaningful engagement.
- **Volunteer-Led Guidance:** Maintain the Cruise Forth Volunteers network to assist visitors with information and guidance, enhancing their experience and community connection.

5. Environmental Education and Engagement

- **Visitor Awareness Campaigns:** Provide passengers with sustainability guidelines, including tips for reducing waste, respecting local environments, and supporting green businesses.

- **Shipboard Sustainability Briefings:** Collaborate with cruise operators to offer onboard briefings about Edinburgh’s environmental initiatives and responsible tourism practices.

6. Enhancing Data and Monitoring

- **Real-Time Monitoring:** Implement systems to track visitor numbers, transport usage, and environmental impacts for continuous improvement.
- **Feedback Mechanisms:** Use passenger and community feedback to refine sustainability efforts and ensure positive outcomes.

7. Partnerships and Collaboration

- **Collaboration with Cruise Lines:** Work with operators to align on sustainability goals and initiatives, such as carbon offset programs.
- **Local Operator Partnerships:** Strengthen relationships with eco-certified local businesses and service providers.

8. Long-Term Goals

- **Net-Zero Goals:** Align cruise tourism practices with Scotland’s wider net-zero ambitions, including promoting renewable energy usage at ports.
- **Green Freeport Integration:** Leverage Edinburgh’s connection to the Forth Green Freeport initiative to support sustainable trade and logistics practices.

14. Destination Benchmarking

This chapter presents the findings from desk research on five Northern European ports and one Mediterranean port. Each port offers a contrasting experience of cruise tourism and has adopted distinct approaches to managing cruise ships and their visitors. These case studies highlight diverse strategies for balancing the economic, social, and environmental impacts of cruise tourism while enhancing the overall visitor experience. The insights gained from these ports provide valuable lessons and potential best practices that can inform future developments in cruise tourism management within Edinburgh and the South East of Scotland.

The 6 ports are:

- Copenhagen
- Bergen
- Reykjavik
- Oslo
- Stockholm
- Dubrovnik (included as this comparison of a World Heritage City)

The case studies are intended to demonstrate the context for cruise tourism in each destination, and the relative success in managing the volume and resulting impact of cruise tourism visits. Key learnings from each case study have been identified and are detailed in The Evidence Based Report.

14.1 Summary of Destinations Cruise Tourism Case Studies

- **Bergen:** Bergen leverages Norway's National Tourism Strategy 2030, emphasizing sustainability and eco-conscious practices. Key initiatives include the Environmental Port Index (EPI) and Onshore Power Supply (OPS), reducing emissions and promoting green practices among cruise operators. Despite lacking a dedicated cruise tourism strategy, Bergen focuses on managing visitor impact through guided tours and dispersing tourists. Iconic attractions like Bryggen, a UNESCO World Heritage site, and Fløibanen Funicular make it a premier cruise destination. Collaboration between stakeholders and the integration of technology enhance Bergen's ability to accommodate high volumes of cruise passengers sustainably.
- **Belfast:** Belfast's strategy is centred on attracting more cruise ships and enhancing visitor experiences. In 2024, a record 145 cruise ships brought 260,000 passengers, generating £20 million in economic impact. Sustainability efforts include exploring shore power facilities and promoting eco-friendly excursions. Attractions such as Titanic Belfast and the Giant's Causeway highlight its rich cultural and natural heritage. Community involvement and immersive technologies like AR/VR tours strengthen Belfast's position as a growing cruise destination. Ongoing development of new attractions and tailored shore excursions ensure a forward-thinking approach to tourism growth.
- **Copenhagen:** Copenhagen's 2024–2030 Tourism Strategy focuses on sustainability, inclusivity, and innovation, aligning with its goal to become the world's first carbon-neutral capital city by 2030. Investments in Europe's largest shore power facility at Langelinie and Océankaj reflect its commitment to reducing emissions. Initiatives like the CopenPay scheme incentivize sustainable traveller behaviour. Iconic attractions such as The Little Mermaid and Nyhavn draw visitors, while public-private partnerships and the New Cruise City App enhance visitor management. Copenhagen's focus on eco-conscious practices and technology cements its status as a leader in sustainable cruise tourism.
- **Reykjavik:** Reykjavik emphasizes sustainable tourism through its Visitor Levy and Tourist Site Protection Fund, which finance projects to protect Iceland's natural and cultural heritage. Strategies focus on dispersing tourists to alleviate pressure on the city centre while promoting attractions like Hallgrímskirkja and the Harpa Concert Hall. The Skarfabakki Terminal supports efficient cruise operations, complemented by the Strætó Bus System and bike rentals for eco-friendly transport. Reykjavik's expanding cruise network, coupled with educational campaigns and stakeholder collaboration, positions the city as a top destination for environmentally conscious travellers.
- **Stockholm:** Stockholm integrates cruise tourism into its broader urban planning through the Stockholm City Plan, prioritizing sustainability and community engagement. The city is a pioneer in onshore power

facilities, reducing emissions at the Stadsgarden quay. Stockholm excels in waste management, with 85% of cruise ships disposing of black and grey water at port. Iconic attractions like The Royal Palace, Gamla Stan, and the Vasa Museum showcase its rich cultural heritage. Collaborative efforts through the Stockholm Cruise Network and innovative digital tools, such as AR-guided tours, ensure Stockholm remains a leading cruise destination in Northern Europe.

- Dubrovnik, a UNESCO World Heritage Site, implemented sustainable tourism management to address overtourism caused by rapid visitor growth (137% increase from 2011-2019) and significant cruise tourism contributions. Key measures included - Berthing Policy: Capped visitors in the old town at 4,000 at a time and required ships to stay for a minimum of 8 hours. Smart City Tools: Streamlined transport and infrastructure management to prevent overcrowding. Cruise Ship Tax: Funds from size- and passenger-based fees (up to €5,300) were reinvested in transport infrastructure. Coordination Committee: Local representatives ensured community involvement in cruise tourism management. These efforts improved residents' quality of life, reduced overcrowding, preserved cultural heritage, and boosted local spending by extending passenger stay times. Collaboration with cruise stakeholders ensured tailored, effective solutions aligned with Dubrovnik's unique challenges.

14.2 Key Takeaways from Destination Case Studies

All cities emphasize sustainability, community involvement, and leveraging their unique cultural and natural assets to attract cruise visitors. While each destination tailors its approach to its local context, the shared focus on eco-conscious practices and innovative visitor management strategies positions them as leaders in the global cruise tourism industry.

Lessons can be learned from the successful cruise management strategies of cities like Bergen, Copenhagen, Stockholm, and Belfast, which emphasize balancing tourism growth with sustainability and community well-being. Key takeaways include:

- **Sustainable Tourism Management:**
 - **Bergen:** Bergen is part of the UNESCO World Heritage network and has adopted strict measures to limit overtourism. Limits daily cruise passengers to protect the environment and cultural sites.
 - **Copenhagen:** Focuses on reducing cruise tourism's carbon footprint with shore power facilities and eco-friendly excursions.
- **Passenger Flow & Infrastructure:**
 - **Stockholm:** Stockholm uses multiple ports to distribute passenger arrivals, reducing congestion in the city centre. The city also provides clear signage and efficient transport options to facilitate smooth movement.
 - **Belfast:** Belfast integrates cruise passengers into broader tourism strategies by offering curated tours to regional attractions like the Giant's Causeway. This disperses visitors and supports local economies outside the city.
- **Community Engagement:**
 - **Bergen:** Local community engagement is prioritized, with measures to ensure tourism benefits residents economically and socially.
 - **Belfast:** Aligns cruise tourism with broader development plans through collaboration with local councils.
- **Data-Driven Planning:**
 - **Copenhagen:** Uses data analytics to monitor visitor patterns and inform management decisions.
 - **Stockholm:** Provides real-time visitor information to reduce overcrowding and improve experiences.
- **Cultural & Environmental Education:**
 - **Bergen:** Informs visitors about cultural and natural heritage to foster respect.
 - **Copenhagen:** Encourages exploration of neighbourhoods to spread visitors beyond central areas.

Conclusion

Developing a sustainable and balanced cruise tourism strategy, Edinburgh and South East Scotland region must adopt a holistic approach that integrates best practices from leading European cruise destinations. Bergen's focus on sustainability highlights the importance of managing visitor impact while ensuring long-term benefits for local communities. Copenhagen's investment in infrastructure and targeted marketing strategies demonstrates how destinations can enhance the cruise visitor experience while driving economic growth. Stockholm's successful visitor dispersal initiatives showcase the potential to extend tourism benefits beyond central hubs, alleviating pressure on over-visited areas. Belfast's approach to regional integration underscores the value of cross-sector collaboration and developing cruise-ready experiences across a wider geographic area.

By applying these lessons, Edinburgh and South East Scotland can develop a comprehensive cruise passenger management plan that not only maximises economic benefits but also safeguards cultural heritage, supports local businesses, and ensures an environmentally responsible approach to cruise tourism. Through coordinated stakeholder engagement, improved transport links, and enhanced business readiness across the region, cruise tourism can become a driver of sustainable growth, delivering meaningful benefits to communities while enhancing the overall visitor experience.

15. Cruise Ship Passenger Levy

The Visitor Levy (Scotland) Bill was passed on the 28th of May and became an Act on the 5th of July 2024. This legislation will give Scottish Councils the power to introduce a visitor levy to their area, the profits from which will be invested into local facilities and services. The levy will be applied to overnight stays, as a proportion of the cost for accommodation and will be collected by accommodation providers before being remitted to the relevant local authority. This will apply to almost all forms of overnight accommodation but does not apply to cruises as people tend to sleep on board the vessel rather than on land.

Throughout consultation informing the Visitor Levy Bill, concerns were raised about the fact cruise ship tourists will not be captured in the visitor levy in its current form. As such, calls have been made for a separate or supplementary piece of legislation that introduces a levy specifically targeted at cruise tourists. This is currently in the very early stages of consultation with the Scottish Government committing to explore the issue with relevant stakeholders and the public.

Similar levies have been introduced in other popular cruise destinations around the world, with varying levels of success and each with a slightly unique focus. Some of these case studies are explored below.

15.1 Case Studies – Passenger Levy Charges

Bergen: Bergen charges cruise passenger a fee of NOK 56,00 (£4) for disembarkation and boarding, and NOK 17,00 (£1.20) for passengers in transit. This is for use of port facilities rather than a wider tax. However, it is still a charge on passengers for use of facilities and services. In 2023 Bergen had 358 ship visits, making it the most visited port in Norway.

Tallinn: Tallinn has passenger fees for all people arriving in the city. This applies to everyone who arrives, whether on one of the ferry routes or on a cruise. This is 1.75 euros.

Amsterdam: There is a day tourist tax for stopover cruise passengers of 14 euros/ day. It is not charged to people who are starting or ending their cruise in Amsterdam. This is likely due to there already being a tourist tax for those who are staying in accommodation in Amsterdam, of 12.5% of the overnight rate. Even with this charge Amsterdam is looking to cap the number of cruise ships to 100 per year in 2026, showing that the charge has not lowered the amount of cruise ships significantly.

Reykjavik: The Icelandic government reintroduced a tourist tax on the 1st of January 2024. The fee is ISK 1,000 (£5.59) per cabin per day. This is in comparison to hotels and guesthouses charging ISK 600 and campsite and mobile homes charging ISK 300. Notably this is not per person.

Barcelona: Barcelona introduced a tourist tax in 2012. and in every year, except during COVID, the number of stopover passengers has continued to increase, to more than 3 million in 2023. For stopover cruise passengers this tax is set at £6 which the current mayor has proposed to “substantially raise the tax for people on cruise stopover”.

Dubrovnik: As of 2021 Dubrovnik has introduced a tax on cruise ships. It is not directly on passengers but is calculated by passenger size of the cruise ship, coming out at approximately £1.20 per person. Despite this, from January to May 2024 (from an article published in July, so not showing the high season months), Dubrovnik was the most visited of the Croatian Adriatic ports. 92 of the nearly 150 cruise ships in the area stopped in Dubrovnik.

Venice: Venice ran a 29-day pilot scheme in 2024, charging day trippers 5 euro/ person. Though not exclusive to cruise passengers, they are included in it. It is applicable during weekends and holidays in the high season, coming to 54 days in the year. This is to address overtourism and fund maintenance and upkeep of the city. Given that they are reintroducing it this year, it is presumed that it is not expected to make a large negative impact on the tourism industry of the city.

15.2 Cruise Tourism Levy: Potential Impacts

The Visitor Levy (Scotland) Act 2024, effective from May 2024, enables local authorities in Scotland to impose a levy on the accommodation element of overnight stays. The legislation aims to generate funds for enhancing facilities and services used by visitors, whether for leisure or business. The primary objective is

to ensure that all visitors contribute fairly to the maintenance and enhancement of the services and infrastructure used during their stay.

While no specific levy on cruise passengers is currently in effect, the ongoing consultations and legislative considerations could be the precursors to implementing such a measure. Implementing a visitor levy on cruise passengers involves several practical considerations to ensure its feasibility, fairness, and alignment with broader tourism and economic goals. A specific issue, for example, is that ports on the west coast of Scotland welcome cruise liners that transport guests to Edinburgh; it is important that there is a common approach by local authorities to prevent unintended consequences.

The impacts of cruise tourism levies are summarised below:

Positive impacts

- Provides funds for infrastructure, environmental projects, and public transport
- Helps balance tourist demographics by managing the influx of visitors
- Supports pollution reduction, landmark preservation, and green technologies
- Ensures cruise passengers contribute to city upkeep.

Negative impacts

- May discourage budget-conscious visitors, slightly reducing numbers
- Requires additional resources to manage levy collection
- Could harm businesses reliant on high visitor volumes
- Risk of locations being perceived as expensive or unfriendly to tourists
- Visitors may view levies as an added burden, leading to dissatisfaction.

Learning

A number of European cities have taken action to limit the numbers of cruise passengers visiting. These actions have been driven as cruise ships can contribute to overtourism by introducing large groups of visitors at once, straining city services and facilities. Cities such as Dubrovnik, Bergen, Amsterdam, Barcelona, and Venice have implemented levies or tourist taxes to manage this issue. These funds are typically used for city infrastructure maintenance, environmental sustainability projects, or local transport improvements. The collection methods vary—some are charged by the port, others by the city. Despite the actions taken to date, all cited cities have retained robust tourism levels with some even planning further actions, including increased fees (Barcelona) or limits on cruise ship numbers (Amsterdam).

In the case of Edinburgh, the city attracts approximately five million overnight visitors. The number of cruise visitors is c248,000; c5% of the overnight visitor numbers. In this respect, the number of cruise visitors is a relatively small percentage of the total visitor population.

Conclusions: Cruise Passenger Levy and Regional Considerations

The potential effects of a cruise ship levy on Edinburgh and the wider region, including Fife, remain uncertain until implementation. However, case studies from other destinations that have introduced similar levies provide insight into potential outcomes. Research incorporating both primary data and secondary sources suggests that a cruise levy—similar to the forthcoming land-based visitor levy in Edinburgh—is unlikely to significantly deter cruise visitors.

The primary challenges associated with implementing such a levy are logistical rather than demand-driven. Key concerns include ensuring coordination between multiple local authorities, such as Edinburgh and Fife, and establishing a streamlined collection process at different port locations. Without careful alignment, administrative costs could disproportionately reduce the funds available for reinvestment in tourism infrastructure, visitor management, and community benefits.

16. Miscellaneous

16.1 Destination Carrying Capacity Assessment:

The increasing number of cruise ships visiting Edinburgh has raised concerns regarding the city's destination carrying capacity and the associated impacts on infrastructure, environment, and local communities.

Growth in Cruise Tourism:

- Cruise Ships to the Forth have increased in recent years with 2024 seeing the largest number of Cruise Ships (see Chapter 3).
- Cruise ship visits to the Forth have increased, with 2024 seeing the highest number of arrivals (see Chapter 3).
- In addition to ships calling at the Forth, over 75 cruise ships berth at Greenock, bringing approximately 115,500 passengers annually. While no definitive data exists on shore excursions from Greenock, anecdotal reports suggest 60% of excursions travel to Edinburgh.
- In September 2024, the Disney Regal transferred 800 passengers by ScotRail to Edinburgh, but this rail transfer will not be available in 2025.

Table 19 Additional Port Calls that Include Tours to Edinburgh in 2024:

Cruise Line	Ship	Port	Dates
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Sun 05 May 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Tue 14 May 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Fri 07 Jun 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Tue 18 Jun 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Thu 11 Jul 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Sat 03 Aug 2024
TUI Cruises GmbH	MEIN SCHIFF 3	Greenock	Sat 24 Aug 2024
Disney Cruise Line	DISNEY DREAM	Greenock	Tue 10 Sep 2024

Impacts on Destination Carrying Capacity:

- Infrastructure Strain: Cruise tourism does place pressure on Edinburgh's infrastructure, including transportation systems, public services, and tourist attractions. The influx of passengers can lead to congestion, particularly in popular areas, affecting both visitors and residents. Attractions in Edinburgh have reviewed admission practices to ensure high quality visitor experiences²² e.g.
 - Edinburgh Castle: Reduced daily visitor capacity from 16,000 to 8,000 to alleviate congestion and enhance the visitor experience.
 - The Royal Yacht Britannia has introduced tailored offers for group visit - May to September groups of 15 or more receive a 10% discount during the first and last three group slots of the day, thus relieving pressure from high volume groups at peak times. January to April, October to December: The 10% discount for groups of 15 or more is available throughout the day.
 - Roslyn Chapel introduced tour operator guidelines to maintain a high quality visitor experience, this includes - Advance Booking: Mandatory for group visits to manage capacity effectively, limiting Groups to 25 people and scheduling tour arrivals and departures to schedule to 90 minute time slots.

These measures, including reduced visitor capacities and tailored group visit options, have been introduced to manage the overall volume of group business and are not specifically targeted at cruise tourism.

²² Note: These restrictions have been introduced to manage the volume of group business and not specifically for cruise tourism. These have been introduced since the COVID 19 pandemic.

However, they indirectly help mitigate the impact of increased passenger influx during peak tourist seasons.

- **Environmental Concerns:** The environmental impact of increased cruise traffic is notable. Cruise ships contribute to air and water pollution, and the high volume of visitors can strain local ecosystems. The cruise industry faces pressure regarding its sustainable community and environmental impact, especially concerning large vessels.
- **Community Impact:** The arrival of large numbers of cruise passengers can disrupt local communities, leading to overcrowding and affecting the quality of life for residents. There is a need to balance the economic benefits of cruise tourism with the well-being of local communities.
- **Capacity of Cruise Forth volunteers:** Cruise Forth relies heavily on volunteer support for guiding, visitor assistance, and coordination at the ports. Any increase in Cruise Ship numbers has the potential through limited volunteers to manage growing visitor numbers effectively.

Destination Comparisons

Edinburgh faces increasing cruise tourism pressures due to reliance on tendering, growing visitor numbers, and sustainability concerns. Compared to other major European cruise ports, it lags in infrastructure development, environmental policies, and visitor management strategies.

Table 20 Cruise Ship Calls (2023 & 2024) Comparison

Port	2024 Calls	Multiple Ships Per Day
Bergen	317	Yes, frequently
Lisbon	369	Yes, peak days
Hamburg	268	Yes, major port
Copenhagen	280	Yes, common
Stockholm	121	Yes, peak season
Oslo	134	Yes, summer months
Tallinn	100	Yes, peak season
Edinburgh	140	Rarely

Key Comparisons

Edinburgh’s cruise tourism operations accommodate a growing number of ships, though its infrastructure differs from ports such as Hamburg, Copenhagen, and Lisbon, which benefit from deep-water berthing, enabling more efficient passenger flow. Destinations like Bergen, Tallinn, Copenhagen, and Oslo regularly handle multiple ships per day, requiring strong visitor management strategies to avoid congestion.

To mitigate tourism pressures, Copenhagen, Amsterdam, and Bergen have introduced arrival caps, while Edinburgh faces peak-time overcrowding at key attractions, similar to Venice before its cruise restrictions. Sustainability efforts also vary across destinations—Amsterdam and Venice enforce strict environmental controls, while Hamburg and Copenhagen are investing in shore power to reduce emissions.

Management and Mitigation Strategies:

- **Strategic Planning:** Developing a Regional Cruise Passenger Management Plan allows for a strategic and collaborative approach to better manage cruise passengers in the destination. This initiative aims to ensure a responsible approach to managing existing visitors rather than increasing capacity by attracting additional cruise ships.
- **Sustainable Practices:** Implementing sustainable tourism practices, such as regulating the number of cruise ships and passengers, promoting off-peak visits, and investing in eco-friendly infrastructure, can help mitigate negative impacts.
- **Community Engagement:** Engaging with local communities to understand their concerns and involving them in decision-making processes ensures that tourism development aligns with the interests and capacities of the destination.

- The cruise sector can draw lessons from Edinburgh Airport's approach to managing large numbers of passengers and distributing visitors effectively across the region. Key insights and potential applications are detailed in The Evidence Based Report include:

Balancing the growth of cruise tourism with the destination's carrying capacity is crucial to maintaining Edinburgh's appeal as a tourist destination while preserving its infrastructure, environment, and community well-being.

The Evidence Based Report summarises lessons the cruise sector can draw from Edinburgh Airport's approach to managing large numbers of passengers to improve the managing of high volumes of passengers, address environmental concerns, and enhancing positive relationships with local communities and stakeholders while ensuring a sustainable and enjoyable experience for visitors.

Conclusion

Edinburgh and the wider South East Scotland region face capacity challenges especially during peak tourism periods, particularly in August when the city's major festivals coincide with cruise ship arrivals. While cruise tourism brings economic benefits, the region's ability to accommodate additional cruise passengers during peak season depends on several key factors:

1. Visitor Capacity in Edinburgh During the Festival Season

- **High Congestion:** Edinburgh is already at maximum visitor capacity during August due to the Edinburgh Festival Fringe, International Festival, and Military Tattoo. Accommodation, transport, and attractions are heavily utilised by festival-goers, making it challenging to absorb additional cruise passengers.
- **Transport Limitations:** Public transport, taxis, and private hire vehicles face increased demand, limiting the ability of cruise passengers to move efficiently within the city.
- **Tourism Business Strain:** Restaurants, attractions, and hospitality services already experience high demand, reducing the capacity for additional cruise passenger bookings.

2. Cruise Ship Scheduling

- **Cruise Ship Schedules:** Cruise ship schedules for Edinburgh and South East Scotland are booked through to 2029, making changes to capacity management challenging.

3. Visitor Dispersal Beyond Edinburgh

- **Regional Opportunities:** While Edinburgh may struggle with additional visitors, surrounding regions (Fife, Stirling, Scottish Borders, East, West and Mid Lothian) have capacity to absorb more cruise passengers.
- **Transport Barriers:** The lack of direct transport links from cruise ports (e.g., train stations not within walking distance, limited scheduled coach services) restricts the ability to efficiently disperse independent visitors to alternative destinations.

16.2 Practical Data Driven Innovation for Visitor Economy Management

The development of a Data-Driven Innovation (DDI) approach to visitor economy management was supported with contribution by Joshua Ryan-Saha, Director – Traveltech, Edinburgh Futures Institute.

A Data-Driven Innovation (DDI) approach to visitor economy management must balance ambition with practicality. While comprehensive real-time systems may be an ultimate goal, immediate value lies in better utilising existing data and strengthening information sharing among stakeholders. This document outlines realistic options for implementing DDI in tourism management, focusing on cruise ship arrivals to the Forth.

Core Opportunities

1. Information Distribution and Communication

- **Enhancing Existing Tools:**

- Leverage Cruise Mapper API (or alternative) for automated arrival notifications, but address potential data gaps by coordinating directly with port authorities.
- Develop user-friendly interfaces or apps to simplify information access for stakeholders like transport providers and local businesses.
- Establish clear protocols for sharing operational updates, ensuring timely and relevant communication rather than relying solely on real-time analytics.
- **Benefit vs Cost:** Low implementation cost with immediate operational benefits, particularly for scheduling and resource coordination.

2. Basic Monitoring and Analysis

- **Selective Sensor Deployment:**
 - Strategically place people counters (or counting cameras) at critical bottlenecks and high-traffic areas.
 - Monitor vehicles in key car parks and bus staging areas to reduce congestion.
 - Analyse mobile network data for broad movement patterns, prioritising high-density areas.
 - Use environmental sensors to monitor the impact on sensitive locations.
- **Cost-effective Alternatives:**
 - Start with manual counts or volunteer-driven data collection to minimise upfront costs.
 - Leverage existing national or citywide mobility data before investing in new deployments.
- **Benefit vs Cost:** Moderate cost requiring clear use cases, but potential to significantly improve traffic and crowd management.

3. Historic Impact Analysis

- **Data Partnership Approach:**
 - Collaborate with financial institutions for anonymised transaction data while addressing privacy concerns.
 - Analyse public transport usage data and integrate it with local business performance metrics.
 - Use available data to assess environmental impacts, beginning with aggregated public data.
 - Encourage local businesses to share anonymised sales data to provide richer insights into economic impact.
- **Benefit vs Cost:** Relatively low cost with high value for policy and planning, enabling targeted improvements and better stakeholder engagement.

Implementation Challenges

1. Data Integration

- Different stakeholders often use incompatible systems. Start with a phased approach by creating a shared database for a small group of stakeholders as a proof of concept.
- Develop open data standards to reduce long-term integration costs and facilitate collaboration.
- Focus on user-friendly data governance frameworks to build confidence in data-sharing processes.
- Explore partnerships with academic institutions and tech startups to develop innovative, cost-effective solutions.

2. Privacy Regulations

- Prioritise early investment in anonymisation tools and ensure compliance with GDPR. Develop training sessions for stakeholders on privacy best practices.

- Engage stakeholders in developing clear, transparent agreements to mitigate concerns and foster trust.

3. Stakeholder Collaboration

- Tailor incentives for local businesses and community groups to encourage participation, such as offering them insights or tools that benefit their operations.
- Organise stakeholder workshops to identify pain points and co-create solutions. Build trust through transparent governance and frequent communication.

Data-Driven Innovation (DDI) Recommendations are detailed in 17.2.5

Success Metrics

- Increased stakeholder satisfaction with the quality and flow of shared information.
- Improved resource allocation during peak periods, reducing congestion in key areas.
- Enhanced capacity for informed policy decisions based on robust analysis.
- Tangible economic benefits for local businesses, measured through transaction and performance data.
- Greater stakeholder participation and engagement in data-sharing initiatives.

Conclusion

Implementing DDI in visitor economy management requires a pragmatic, phased approach. Immediate efforts should focus on making better use of existing data and systems while building trust among stakeholders. Medium- and long-term plans can then introduce advanced technologies and analytics as capabilities and resources grow. Prioritising strong communication networks, incremental improvements, and targeted solutions will yield significant benefits without overreliance on costly, complex systems.

Success depends on fostering collaboration, respecting privacy, and addressing specific operational challenges with practical, scalable solutions. By focusing on stakeholder needs and tangible outcomes, Edinburgh can leverage data-driven innovation to sustainably manage its growing visitor economy.

16.3 Crisis Management and Contingency Planning

In the context of the Cruise Ship Passenger Management Plan, crisis management and contingency planning focus is on ensuring the safety and well-being of passengers during unforeseen events that prevent them from returning to a cruise ship. This differs from maritime emergencies, which are addressed separately under the Forth Ports Emergency Forth Plan (see below).

There are existing protocols within individual companies and organizations involved in managing on-shore passenger experiences. However, a gap remains as there is no overarching, comprehensive set of procedures to address scenarios that might disrupt passenger re-embarkation.

Scenarios that might require planning include:

- Inclement Weather: Storms, heavy rain, or unsafe sea conditions can prevent tenders from operating, delay port operations, or necessitate early departure from port. Potentially a higher risk now with changing climate conditions.
- Transportation Disruptions: Road closures, accidents, or transportation delays can hinder the timely return of passengers to the ship.
- Local Emergencies: Situations like protests, demonstrations, security threats, infectious disease outbreaks.
- Port Operational Issues: Infrastructure failures, such as collapsed gangways or malfunctioning port equipment, or unexpected closures due to regulatory or safety concerns can impede passenger movement.
- Passenger-Related Challenges: Situations such as lost or stranded passengers, injuries requiring medical attention, or detainment due to legal or documentation issues.

There is an Emergency Forth Plan that outlines protocols and procedure for “on-water” incidents. Prepared by Forth Ports the plan outlines procedures for managing maritime emergencies within its jurisdiction, including incidents at key terminals such as Hound Point, Braefoot Bay, and Defence Munitions Crombie. The plan addresses various scenarios, including fires, collisions, explosions, and hazardous material releases. It defines the roles and responsibilities of key stakeholders like Forth Ports Limited, HM Coastguard, Police Scotland, and emergency services. It also provides guidelines for communication, resource coordination, and response actions specific to each type of incident.

Crisis Management and Contingency Plan

Currently, there is no single comprehensive plan in place to address scenarios where cruise passengers cannot return to their ship due to unforeseen incidents. Fife Council Emergency Resilience Team over the past year in collaboration with key partners, including the Maritime and Coastguard Agency (MCA), Forth Ports, emergency services, cruise operators, and shipping agents, to develop contingency measures.

The primary focus of these efforts has been to establish protocols that can be activated in such situations, ensuring the safety and well-being of passengers while minimizing disruption. Additionally, this collaborative approach aims to clarify the roles and responsibilities of each partner, fostering a more coordinated and efficient response to potential emergencies. This ongoing work underscores the importance of preparedness and strong inter-agency cooperation to safeguard the visitor experience and maintain confidence in the region's cruise tourism operations.

There is a clear need for a **Crisis Management and Contingency Plan** specifically tailored for cruise tourism in the region. With five ports and multiple local authorities involved, a coordinated and robust plan is essential to ensure an effective response to disruptions in essential services or operations within Edinburgh and the surrounding areas.

A well-structured contingency plan would:

- **Ensure Passenger Safety and Well-being:** Provide clear procedures for accommodating and supporting passengers during disruptions, including alternative transportation, accommodation, and communication strategies.
- **Minimize Impact on Local Communities:** Avoid overwhelming local resources and mitigate the effects of large numbers of stranded passengers on community services and infrastructure.
- **Protect the Region's Reputation:** A proactive, coordinated response to incidents would maintain Edinburgh's standing as a premier cruise destination, demonstrating reliability and readiness in crisis scenarios.
- **Clarify Roles and Responsibilities:** Establish clear roles for key stakeholders, including Forth Ports, local authorities, emergency services, cruise operators, and community partners, to ensure seamless collaboration and avoid gaps in response.
- **A comprehensive contingency plan would enhance resilience and preparedness, safeguarding the visitor experience while reinforcing trust among cruise operators, passengers, and the local community.**

17. Key Findings, Recommendations and Conclusions

17.1 Key Findings Summary

Cruise tourism contributes to Edinburgh and the South-East of Scotland's economy, culture, and community engagement.

1. Economic Impact

- Passenger and crew spending: In 2024, the region benefited from approximately 248,000 cruise passengers across 140 ship calls with direct onshore spending by passengers and crew being in the range of £11M to £14M
- Supply chain impacts: B2B spending including expenditure in ports and harbours, tours and transport, and resupply is estimated at £19.9M in 2024
- Job Creation: The cruise industry supports numerous employment opportunities across the region, demonstrating its role as a robust job creator. Net direct, indirect, and induced employment is estimated at 463 FTE posts, providing earnings in the locale of £15.7M
- Gross Value Added (GVA): The economic contribution of cruise tourism extends beyond direct spending, boosting the region's overall economic output by c£25.1M
- The net minimum income per passenger is £125.40
- The minimum GVA per passenger £101.21
- Employment per 1000 passengers is c1.87 (direct, indirect and induced).

Visitor Experience Consideration: Economic impact highlights the importance of providing high-quality and memorable experiences for cruise passengers. Visitor spending is often tied to satisfaction, ease of travel, and the diversity of attractions, making investments in infrastructure, transport, and local offerings essential.

2. Cultural and Community Benefits

- Local Engagement: Cruise passengers contribute to the local economy by engaging with businesses and attractions, promoting cultural interaction and enhancing local experiences.
- Volunteer Programs: Initiatives like the Cruise Forth Volunteers enhance community involvement by involving local volunteers in welcoming and assisting passengers.
- Cultural Exchange: Cruise tourism fosters connections between international visitors and local residents, showcasing Scotland's rich history, traditions, and culture. Encourage collaboration with Cruise Lines to promote and support local cultural artisans, performers showcase their work to passengers.

Visitor Experience Consideration: Cultural experiences and authentic interactions are pivotal for enhancing visitor satisfaction. Expanding opportunities for cultural engagement, such as live performances or artisan markets at ports, can leave lasting impressions and encourage return visits.

3. Environmental Considerations

- Sustainability Efforts: The cruise industry is making strides to reduce its environmental footprint. Measures include adopting eco-friendly technologies, collaborating on regional initiatives like the Regional Cruise Passenger Management Plan, and integrating sustainable practices to protect the environment while contributing to the region's economy and culture.

Visitor Experience Consideration: Sustainability not only preserves the environment but also aligns with the preferences of modern travellers, who value eco-conscious experiences. Enhancing green infrastructure and communicating sustainability efforts can enhance passenger perceptions of the destination.

4. Cruise Ship Passengers' Visitor Experience

The Forth Ports

The visitor experience for cruise ship passengers arriving at the four River Forth ports—Leith, Newhaven, South Queensferry, and Rosyth—varies based on the infrastructure, transport links, and available

amenities. While each port offers unique advantages, several consistent themes highlight both strengths and areas for improvement.

1. Scenic and Cultural Appeal:

- South Queensferry offers stunning views of the Forth Bridges, providing passengers with picturesque photo opportunities as soon as they disembark.
- Leith immerses visitors in Edinburgh's maritime history, with direct access to the Royal Yacht Britannia and nearby facilities e.g. Ocean Terminal.
- Rosyth is situated near significant heritage sites, including Dunfermline Abbey, Pittencrieff Park, and the Carnegie Birthplace Museum, providing a rich historical experience.
- The presence of a traditional Scottish piper at disembarkation at all ports, creates a memorable welcome and enhances the sense of arrival for passengers.

2. Proximity to Edinburgh, Dunfermline and Surrounding Attractions:

- Leith and Newhaven offer direct tram and bus connections to Edinburgh making these ports ideal for independent travellers.
- South Queensferry provides convenient access to both Edinburgh, Dunfermline, St Andrews, Stirling and Perth.
- Rosyth serves as a gateway to Fife's attractions, including St. Andrews, Falkland Palace, and Culross, offering scenic drives and historic tours within easy reach.

3. Volunteer Support:

- The Cruise Forth volunteer programme operates effectively across all ports, with dedicated volunteers providing maps, directions, and helpful recommendations to passengers. The challenge on a longer term basis will be maintaining the numbers of volunteers.

4. Additional Strengths Across All Ports:

- Efficient Connections: Transport links at Leith and Newhaven offer quick access to Edinburgh's major attractions, while bus services at South Queensferry and the and shuttle buses at Rosyth make independent travel and excursions easily accessible.

Conclusion

The key strengths of the River Forth cruise ports lie in their scenic settings, cultural authenticity, and connectivity to renowned attractions. The collaborative efforts of Cruise Forth volunteers, transport providers, and local businesses contribute to a positive visitor experience, reinforcing the region's appeal as a premier cruise destination. By building on these strengths, the ports can continue to grow their reputation while enhancing the economic and cultural benefits of cruise tourism.

Challenges and Areas for Improvement

1. Passenger Comfort and Amenities:

- Limited sheltered waiting areas and restroom facilities at some ports, particularly Newhaven and South Queensferry.
- Temporary restroom facilities and lack of seating during peak hours detract from the overall experience.

2. Transport and Accessibility:

- Congestion at pick-up and drop-off points, especially at South Queensferry's X99 bus stop.
- Steep gangways at tender ports (Newhaven and South Queensferry) create mobility challenges during low tide.
- Rosyth lacks direct public transport, relying on shuttle buses to nearby train stations.

3. Wayfinding and Signage:

- Inconsistent signage at all ports, often only in English, making navigation difficult for international passengers.
- Limited real-time transport information at key points.

4. Industrial Settings:

- Rosyth's industrial environment impacts the arrival experience for passengers, with limited landscaping or cultural elements to soften the setting.

5. Cultural Engagement:

- Opportunities to showcase local artisans, music, and food stalls at key disembarkation points.
- Some passengers express a desire for more authentic Scottish experiences and local stories.

Visitor Sentiments and Feedback

- **Positive Impressions:** Most passengers report high satisfaction due to the stunning views, historical landmarks, and efficient shore excursions. The presence of friendly volunteers and cultural elements, such as bagpipe welcomes, adds to the positive experience.
- **Areas for Improvement:** Feedback highlights a need for:
 - More restrooms and sheltered seating.
 - Clearer signage and better transportation coordination.
 - Smoother flow at tender points to reduce wait times and crowding.

Eyemouth

1. Infrastructure:

- Eyemouth Harbour is a working port with limited cruise-specific facilities; passengers are tendered ashore near the town centre.
- The Pavilion could serve as a wet-weather waiting area for passengers.

2. Passenger Services and Facilities:

- Basic public toilets are in poor condition and not consistently open. No dedicated Wi-Fi is available.
- No volunteers support providing maps and local information.

3. Transport Access:

- Limited public transport; the 235 bus connects to Berwick and Reston stations, but timings do not suit cruise schedules.
- Coach parking is available near the harbour.

4. Nearby Attractions:

- Gunsgreen House and the Eyemouth Museum are within walking distance, with excursions available to St. Abbs Head and Paxton House.

5. Visitor Experience:

- The scenic harbour enhances the experience, but the lack of facilities and weather-dependent tendering can be challenging.
- Proximity to the town supports independent exploration and boosts local spending.

Summary:

Eyemouth provides an authentic and scenic experience but would benefit from improved public facilities, transport links, and sheltered waiting areas to enhance comfort and support local businesses.

6. Cruise Forth's Role in Supporting Business Engagement and Seasonal Operations

CruiseForth plays a vital role in connecting local businesses with cruise tourism opportunities, fostering engagement, and maximising economic benefits. Through a series of targeted initiatives, it ensures businesses are well-prepared to capitalise on the growing cruise market while enhancing the visitor experience.

- Annual Business-to-Business Seminar: Held every January, this seminar provides a platform for businesses to engage directly with industry stakeholders, gain insights into the upcoming cruise season, and explore collaboration opportunities.
- Pre-Season Briefings: Targeted briefings in key port areas—including Dunfermline, Leith/Newhaven, South Queensferry, and St Andrews—help local businesses and communities identify ways to engage with both shore excursion providers and independent cruise passengers.
- Ongoing Communication & Updates: Throughout the cruise season, CruiseForth keeps businesses informed via email and WhatsApp groups, providing real-time updates on ship arrivals, special circumstances, cancellations, and visitor expectations.

These initiatives ensure that businesses remain informed, prepared, and positioned to maximise opportunities while enhancing the overall visitor experience.

Volunteer Support and Engagement

- CruiseForth relies heavily on volunteers to support cruise operations, offering wayfinding services, visitor guidance and welcoming hospitality at key ports.
- Volunteers play a crucial role in ensuring a welcoming experience for cruise passengers, helping them navigate transport links, offering local recommendations, and providing essential information.
- Expanding the volunteer base, particularly with multilingual and specialist-trained volunteers, could further enhance visitor engagement and regional dispersal efforts.

This volunteer-led model is integral to CruiseForth's ability to manage operations effectively during peak season while maintaining cost-efficiency. However, ensuring sufficient volunteer recruitment, retention, and training remains a key challenge given the seasonality of the role.

Seasonal Focus and Operational Model

CruiseForth operates with a seasonally intensive approach, focusing its efforts primarily during the summer months when cruise activity is at its peak. Its operations are dictated by the cruise schedule i.e. during peak season, resources are fully committed to welcoming ships, supporting passengers, liaising with businesses, and managing on-the-ground logistics.

With limited human and financial resources, long-term business development, seminars, and product development are primarily undertaken in the off-season (November – March). While strategic planning remains essential, its implementation must be flexible and aligned with seasonal demands. The project manager's capacity is largely dedicated to operational activity during peak season, requiring a structured approach to balance short-term operational needs with long-term strategic development within existing resource constraints.

7. Cruise Tourism Readiness of Edinburgh and South East of Scotland

The readiness of tourism businesses across Edinburgh and South East Scotland to engage with cruise tourism varies significantly. While some destinations and businesses are well-prepared to cater to cruise passengers, others lack the necessary knowledge, capacity, or engagement with cruise lines. Addressing these gaps through targeted business support, collaboration, and product development is essential to ensuring a more inclusive and sustainable cruise tourism economy.

Additionally, improving visitor dispersal by expanding cruise tourism beyond traditional hotspots such as Edinburgh, Dunfermline and St Andrews will help distribute economic benefits more widely across the region while reducing pressure on over-visited areas. Strengthening business readiness in emerging destinations will be key to achieving this balanced approach.

The following highlights the current state of cruise tourism readiness across Edinburgh and South East Scotland, identifying strengths, challenges, and opportunities for growth. They emphasize the need for greater business engagement, improved visitor dispersal, and enhanced collaboration to maximize the economic benefits of cruise tourism while ensuring a sustainable and well-managed approach.

- **Visitor Dispersal:**

Visitor dispersal beyond Edinburgh, Dunfermline, and St Andrews remains a significant challenge due to transport limitations, passenger preferences for familiar locations, and a lack of awareness of alternative destinations. While there is clear demand for authentic, immersive experiences, accessibility issues and limited marketing of lesser-known sites restrict independent exploration.

Key regional opportunities exist in areas such as the Scottish Borders, Falkirk, West Fife, Perth and Stirling. offering nature-based tourism, heritage attractions, and outdoor adventure experiences that align with growing trends in sustainable and expedition-style travel.

Strengthening partnerships with shore excursion operators, improving public transport connectivity, and increasing the visibility of alternative destinations through digital tools and visitor guidance will be critical in enhancing passenger dispersal.

By addressing these barriers through targeted interventions, the region can reduce congestion at over-visited sites while maximizing the economic and cultural benefits of cruise tourism for a broader range of communities.

- **Wider Business Engagement:**

To fully capitalize on the benefits of cruise tourism, it is essential to look beyond the management of passengers at port entry points. Engaging local businesses—particularly those not currently involved in cruise programs—can significantly enhance the visitor experience while dispersing economic gains more evenly across the region. By expanding the network of businesses participating in cruise tourism, there is an opportunity to create new, authentic experiences that reflect the unique identity of local communities.

This approach not only supports small and medium-sized enterprises but also contributes to sustainable tourism by reducing the concentration of visitors at overcrowded sites. Through targeted outreach, training, and collaborative initiatives, this strategy aims to integrate a wider range of businesses into the cruise tourism ecosystem, fostering long-term resilience and economic growth throughout the region.

- **Travel Trade Ready Programme for Cruise Tourism:**

The cruise tourism sector in Edinburgh and the South-East of Scotland has experienced significant growth, bringing both opportunities and challenges for local businesses and communities. While the influx of cruise passengers offers a valuable economic boost, many businesses in the region are not fully equipped to capitalize on this market. A Travel Trade Ready Programme for Cruise Tourism (similar to East Lothian, Fife, South of Scotland) is essential to bridge this gap and ensure that the local economy, cultural heritage, and communities benefit from the sector's growth in a sustainable and meaningful way. See The Evidence Based Report xx for an indicative programme.

- **Destination Cruise Tourism Readiness:** While Edinburgh is well-established in catering to cruise passengers, other areas have varying levels of engagement, infrastructure, and product development tailored to this market. Some destinations, like Dunfermline and St Andrews, already attract cruise visitors, while others, such as the Scottish Borders and Midlothian, have strong potential but lack direct engagement and transport links. Understanding these readiness levels is crucial for developing targeted strategies to enhance visitor dispersal, increase business participation, and create a more sustainable and regionally inclusive cruise tourism economy.

- **Edinburgh (High Readiness):** Many tourism businesses in Edinburgh already serve cruise passengers, particularly in the retail, hospitality, and cultural sectors.

- **Fife (Medium Readiness):** St Andrews and Dunfermline have strong tourism infrastructure and are key attractions for cruise visitors, but the wider Fife region are less engaged.
- **East Lothian (Low-Medium Readiness):** Offers a strong potential for heritage, nature, and food & drink experiences but lacks significant cruise engagement.
- **West Lothian (Low Readiness):** Linlithgow Palace and whisky experiences offer good potential, but businesses lack awareness of cruise tourism as an opportunity.
- **Midlothian (Low Readiness):** Rosslyn Chapel already included in some shore excursions, but the wider region lacks cruise engagement.
- **Scottish Borders (Low Readiness):** Significant untapped potential for literature, history, rural tourism, and nature-based experiences, but almost no engagement with cruise tourism.

Table 28 below outlines recommended actions for improving cruise tourism readiness in each region:

8. Environmental Impacts for the Destination

Cruise tourism presents both opportunities and challenges for environmental sustainability in Edinburgh and South-East Scotland. While the report does not address ship-related emissions, it highlights the need for in-destination environmental management. Key concerns include the strain on local infrastructure, increased carbon footprint from visitor transport, waste generation, and the impact of high visitor volumes on sensitive heritage sites and natural areas.

Addressing these requires sustainable transport solutions, improved waste management at ports, the promotion of eco-friendly shore excursions, and enhanced visitor education on responsible tourism. Collaboration between local authorities, cruise operators, tourism businesses, and environmental agencies will be essential to implement green initiatives and ensure cruise tourism aligns with Scotland's broader sustainability goals.

9. Cruise Passenger Levy Impact

The introduction of a cruise passenger levy presents both opportunities and challenges for Edinburgh and the South East Scotland region. If implemented effectively, the levy could generate additional revenue to support tourism infrastructure, enhance visitor experiences, and fund sustainability initiatives, ensuring that cruise tourism delivers greater benefits to local communities and businesses. However, the actual financial impact remains uncertain, as there is no way to predict whether the levy might reduce cruise ship calls.

Based on 217,000 passengers in 2024, estimated revenue at different fee levels would be:

- £2 per passenger → £434,000
- £4 per passenger → £868,000
- £8 per passenger → £1,736,000

These estimates assume no reduction in cruise visits or passenger numbers due to the levy. However, if cruise operators perceive the fee as a deterrent, they may adjust itineraries in favour of alternative ports with lower or no charges. For example, if Edinburgh introduces a levy while Greenock or Dundee remain levy-free, some cruise lines may shift calls away from Edinburgh, impacting visitor numbers. The long-term effect will depend on how cruise companies and passengers balance the additional cost against the overall appeal of visiting Edinburgh.

Ensuring Effective Use of Levy Revenues

If properly reinvested, levy funds could support:

- Transport infrastructure improvements, ensuring better connectivity for cruise visitors.
- The development of new shore excursions, helping to disperse visitors beyond the city center.
- Environmental initiatives, such as shore power infrastructure or emissions reduction programs, to mitigate the impact of cruise operations.

However, potential challenges must also be considered:

- **Competitiveness Risks:** If the levy is set too high or introduced without industry consultation, it could deter cruise lines and reduce economic benefits for local businesses.
- **Administrative Complexity:** Levy collection and fund distribution will require coordination across multiple stakeholders, including local government, port authorities, and tourism organizations.
- **Industry and Stakeholder Engagement:** A structured approach to engaging with the cruise industry, businesses, and communities will be critical to ensuring successful implementation.

Conclusion

Given the potential for a cruise levy to generate funds, a key recommendation if a levy were to be introduced the regional priorities identified in this report be integrated into any investment strategy. A coordinated, regional approach to cruise-related investment would ensure that funds are allocated effectively to enhance visitor experiences, improve infrastructure, and maximize benefits for local communities.

This approach would not only reinforce Edinburgh's role as a key cruise destination but also support Fife and other regional areas by enabling investment in visitor dispersal strategies, transport improvements, and sustainable tourism initiatives.

By aligning levy revenues with regional tourism priorities, the levy could become a powerful tool for fostering long-term economic and environmental sustainability in Edinburgh and South East Scotland's cruise tourism sector. A transparent mechanism for fund allocation, with input from local councils, tourism organizations, and port authorities, would help ensure that the levy delivers measurable benefits across the wider region.

However, at this stage, there is no clear recommendation on whether to introduce or not introduce a levy, as further work is required to fully assess its potential impacts. Additional economic modelling, stakeholder engagement, and industry consultation are necessary to evaluate the feasibility, competitiveness, and long-term effects before a decision can be made.

17.2 Recommendations

The following indicative recommendations outline the opportunities to enhance Edinburgh and South East Scotland's cruise passenger management, ensuring a balance between economic growth, community well-being, and environmental sustainability. These actions focus on infrastructure development, stakeholder collaboration, sustainable practices, and visitor experience enhancement. By building stronger partnerships, leveraging data, and promoting responsible tourism, the region can optimise the benefits of cruise tourism while minimizing its impact on local communities and ecosystems.

The Cruise Passenger Management Plan emphasizes enhancing visitor experiences while supporting sustainable tourism. Lessons from other ports highlight the importance of investing in infrastructure that balances operational efficiency with environmental stewardship. Many successful ports have implemented eco-friendly practices, such as shore power facilities, waste management systems, and initiatives to protect marine ecosystems. These investments not only mitigate environmental impacts but also align with the growing consumer demand for sustainability.

It is acknowledged that implementing many of the recommendations will require significant resources in terms of funding, staffing, and infrastructure development. A structured prioritisation process will be necessary that focusses on initiatives that deliver the greatest impact on economic growth, community well-being, and environmental sustainability while leveraging existing assets and partnerships to maximize efficiency.

17.2.1 Cruise Forth

Cruise Forth is well-positioned to support the growth and impact of cruise tourism in the South East of Scotland but requires additional resources to overcome current constraints. Strategic investment will

empower Cruise Forth to enhance passenger experiences, strengthen local business engagement, and establish itself as a leader in sustainable cruise tourism for the South East of Scotland.

Recommendation	Action	Priority	Stakeholders
Expand Organizational Capacity	<ul style="list-style-type: none"> Explore opportunity to secure additional funding and staff to manage operations, volunteer coordination, and stakeholder relationships. Invest in technology for scheduling, engagement, and data analysis. Establish Cruise Forth as a knowledge hub for cruise tourism insights and trends. Continue to deliver and expand training programs for businesses, communities, and volunteers. 	High	<ul style="list-style-type: none"> Cruise Forth, CEC, Fife Council VisitScotland Technology Providers
Strengthen Stakeholder Collaboration	<ul style="list-style-type: none"> Build partnerships with cruise lines to gather data on passenger demographics and interests. Collaborate with transport providers and Forth Ports to improve passenger flow and facilities. Work with local businesses to develop tailored cruise-friendly offerings. 	High	<ul style="list-style-type: none"> Cruise Forth, Cruise Lines, Transport Providers, Forth Ports, Local Businesses Local Authorities
Develop and Promote Shore Excursions	<ul style="list-style-type: none"> Develop a Cruise Tourism Excursion Accelerator Programme to create exclusive tours. Promote excursions through pre-arrival materials, onboard marketing, and digital platforms. 	Medium	<ul style="list-style-type: none"> Cruise Forth, Local Attractions, Tour Operators, Cruise Lines
Volunteer Program	<ul style="list-style-type: none"> Expand the volunteer base, focusing on multilingual capabilities and expertise. 	Low	<ul style="list-style-type: none"> Cruise Forth, Community Groups, Volunteer Networks
Marketing and Branding	<ul style="list-style-type: none"> Upgrade digital platforms with real-time updates and personalized itineraries. Collaborate with cruise lines to market attractions and excursions. Develop digital campaigns targeting independent passengers to encourage higher passenger spending and linger longer. 	High	<ul style="list-style-type: none"> Cruise Forth, Digital Marketing Agencies, Local Authorities VisitScotland Cruise Lines
Regional Leadership	<ul style="list-style-type: none"> Support green port developments Develop eco-friendly excursions showcasing the region's natural environment Position Cruise Forth as a leader in sustainable cruise tourism through advocacy and collaboration. 	High	<ul style="list-style-type: none"> Cruise Forth, Environmental Groups, Local Councils, Regional (Scotland wide) Cruise Organisations
Community Representation	<ul style="list-style-type: none"> Continue to be the liaison between cruise operators and local communities. 	Medium	<ul style="list-style-type: none"> Cruise Forth, Local Communities,

Recommendation	Action	Priority	Stakeholders
	<ul style="list-style-type: none"> Promote initiatives encouraging passengers to engage with local artisans, businesses, and cultural sites. 		<ul style="list-style-type: none"> Cultural Organizations, Cruise Lines Local Authorities

Technology Developments

Investing in advanced digital tools is essential for Cruise Forth to enhance passenger experiences, streamline coordination with stakeholders, and support sustainable tourism. Improved platforms can provide real-time updates, personalized itineraries, and data-driven insights, ensuring the region remains competitive while maximizing the economic and cultural benefits of cruise tourism. The table below summarises the recommendations for Website, App Development, and Technology Improvements for Cruise Forth.

Recommendation	Details	Priority	Stakeholders
Digital Enhancements	<ul style="list-style-type: none"> Upgrade website and app for real-time updates on cruise schedules, transport, and attractions. Introduce features for personalized itineraries and booking options. 	High	<ul style="list-style-type: none"> Cruise Forth, Technology Providers, Local Authorities Forth Ports
Passenger Engagement	<ul style="list-style-type: none"> Develop interactive maps, local recommendations, and cultural insights. Add multilingual support for accessibility. 	High	<ul style="list-style-type: none"> Cruise Forth, Digital Developers, Cultural Organizations
Stakeholder Integration	<ul style="list-style-type: none"> Create a centralized platform for coordination with cruise operators, volunteers, and local businesses. Use technology to streamline scheduling and collaboration. 	Medium	<ul style="list-style-type: none"> Cruise Forth, Cruise Operators, Local Businesses, Volunteer Networks
Data-Driven Decision Making	<ul style="list-style-type: none"> Implement analytics tools to track passenger behaviours and spending patterns. Share insights with local businesses and attractions for tailored offerings. 	Medium	<ul style="list-style-type: none"> Cruise Forth, Data Analytics Providers, Local Businesses, Tourism Boards
Sustainability and Communication	<ul style="list-style-type: none"> Promote eco-friendly practices via the platform, such as sustainable transport options. Enable push notifications for real-time updates on transport or schedule changes. 	High	<ul style="list-style-type: none"> Cruise Forth, Environmental Organizations, Transport Providers, Technology Developers

17.2.2 Destination Environmental Impacts

Action	Timeline	Priority	Stakeholders
Clarify and communicate in-destination environmental recommendations	Short-term (0-6 months)	High	<ul style="list-style-type: none"> Local authorities, Cruise Forth, Forth Ports, Tourism organisations

Action	Timeline	Priority	Stakeholders
Develop a sustainable transport plan, including electric shuttle buses and active travel routes	Medium-term (1-3 years)	High	<ul style="list-style-type: none"> Local transport providers, Local Authorities Forth Ports, Cruise Lines
Enhance waste management and recycling facilities at key ports	Short-term (0-12 months)	High	<ul style="list-style-type: none"> Forth Ports, local councils, environmental agencies
Implement timed visitor access and crowd management strategies for environmentally sensitive sites	Medium-term (1-3 years)	Medium	<ul style="list-style-type: none"> Historic Scotland, NatureScot, Tourism organisations
Increase green shore excursions and low-impact tourism experiences (e.g., wildlife tours, walking routes, cycling options)	Short-term (0-12 months)	High	<ul style="list-style-type: none"> Tour operators, Cruise Forth, VisitScotland, Local businesses
Introduce shore power facilities at Leith to reduce cruise ship emissions	Long-term (3-5 years)	High	<ul style="list-style-type: none"> Forth Ports, Scottish Government, Cruise operators
Strengthen environmental education and awareness campaigns for cruise passengers	Short-term (0-12 months)	Medium	<ul style="list-style-type: none"> Cruise Forth, VisitScotland, Local Authorities
Develop carbon offset and visitor contribution schemes for sustainability projects	Medium-term (1-3 years)	Medium	<ul style="list-style-type: none"> Cruise operators, Tourism Organisations, Environmental NGOs
Improve monitoring and data collection on cruise tourism's environmental impact	Medium-term (1-3 years)	Medium	<ul style="list-style-type: none"> Universities, Research institutions, Forth Ports, Scottish Government

17.2.3 Visitor Experience

Table 21 Infrastructure and Sustainability

Infrastructure and Sustainability			
Focus Area	Recommendation	Priority	Stakeholders
Wayfinding	<ul style="list-style-type: none"> Install multilingual signage throughout ports to guide passengers to transportation, amenities, and local attractions. 	High	Local councils, Cruise Forth, port authorities
Digital Info Boards	<ul style="list-style-type: none"> Use electronic boards for real-time updates on ship schedules, transportation, and tourist information. 	Medium	Port operators, cruise lines, local authorities
Wi-Fi Access	<ul style="list-style-type: none"> Provide reliable, free Wi-Fi at all ports to help passengers access travel information and communicate easily. 	High	Port authorities, telecom providers, Cruise Forth
Eco-Friendly Transport	<ul style="list-style-type: none"> Encourage the use of low-emission or electric coaches for excursions. 	High	Transport providers, local councils, VisitScotland

Infrastructure and Sustainability			
Focus Area	Recommendation	Priority	Stakeholders
Carbon Footprint Monitoring	<ul style="list-style-type: none"> Collaborate with stakeholders to measure and mitigate the environmental impact of cruise tourism. 	Medium	Environmental agencies, cruise operators, port operators
Waste Management	<ul style="list-style-type: none"> Implement efficient waste disposal and recycling systems to manage ship and passenger waste sustainably. 	High	Port authorities, environmental agencies, contractors
Pedestrian-Friendly Routes	<ul style="list-style-type: none"> Develop safe walking routes and bike rental services at key ports (e.g., Newhaven and Leith). 	Medium	Local councils, transport providers, Cruise Forth

Port-Specific Recommendations

Table 22 South Queensferry Infrastructure

South Queensferry			
Focus Area	Recommendation	Priority	Stakeholders
Passenger Facilities	<ul style="list-style-type: none"> Enhance the footprint, access, and waiting areas at the X99 boarding location to reduce congestion and improve passenger flow. 	High	Local councils, Cruise Forth, transport providers
	<ul style="list-style-type: none"> Short to Medium Term: Establish a temporary visitor information point where Cruise Forth volunteers can assist passengers and provide support. 	High	Cruise Forth, City of Edinburgh Council, Coastguard
	<ul style="list-style-type: none"> Long Term: Develop a high-quality visitor centre integrated with the proposed Forth Bridge Experience, providing restrooms, wet-weather facilities, and educational exhibits. 	High	Network Rail, Cruise Forth, National Heritage Groups
Sheltered Waiting Areas	<ul style="list-style-type: none"> Provide covered seating areas for passengers waiting for transportation, especially during adverse weather. 	High	City of Edinburgh Council, Cruise Forth
Parking and Accessibility	<ul style="list-style-type: none"> Expand parking facilities for volunteers and staff to ensure smooth operations during cruise arrivals. 	Medium	Local councils, transport providers, port operators
	<ul style="list-style-type: none"> Improve steps connecting South Queensferry to Dalmeny Station to enhance accessibility for all visitors, including those with limited mobility. 	Medium	ScotRail, City of Edinburgh Council, Network Rail
	<ul style="list-style-type: none"> Ensure Hawes Pier is fully accessible by providing ramps and accessible pathways for passengers with mobility challenges. 	High	City of Edinburgh Council, accessibility advocates
Transport Zones	<ul style="list-style-type: none"> Develop organized, clearly marked zones for independent excursion buses, taxis, and ride-share pick-ups/drop-offs to improve traffic flow and reduce congestion. 	High	Local councils, transport providers, Cruise Forth

South Queensferry			
Focus Area	Recommendation	Priority	Stakeholders
Toilet Facilities	<ul style="list-style-type: none"> Short Term: Provide higher-capacity seasonal modular toilet units²³ with regular cleaning and maintenance throughout the cruise season. 	High	City of Edinburgh Council, private contractors
	<ul style="list-style-type: none"> Long Term: Incorporate permanent restrooms in the visitor centre, with family-friendly, accessible "Changing Places" restrooms. 	High	City of Edinburgh Council, accessibility advocates
	<ul style="list-style-type: none"> Install sustainable water and energy-saving systems, such as sensor taps and low-flush toilets, in new restrooms. 	Medium	Environmental agencies, facilities management firms

Table 23 Rosyth Infrastructure

Rosyth			
Focus Area	Recommendation	Priority	Stakeholders
Passenger Facilities	<ul style="list-style-type: none"> Review seating and covered areas at the disembarkation point to provide comfortable waiting facilities for passengers using shuttle buses or excursion pick-ups. 	High	Cruise Forth, Forth Ports, City of Edinburgh Council
	<ul style="list-style-type: none"> Review the facilities for Cruise Forth volunteers to ensure suitable information provision and storage. 	Medium	Cruise Forth, Forth Ports
Parking and Accessibility	<ul style="list-style-type: none"> Maintain shuttle bus services for passengers travelling to Dunfermline and ensure clear communication of schedules. 	High	Forth Ports, local councils, transport providers
	<ul style="list-style-type: none"> Create a designated zone for private shore excursion buses, taxis, and ride-hailing services to improve traffic flow and reduce congestion. 	High	Forth Ports, transport providers, Cruise Forth
	<ul style="list-style-type: none"> Install multilingual signage to direct passengers clearly to designated pick-up and drop-off points. 	Medium	Forth Ports, Cruise Forth, local councils

Table 24 Newhaven Infrastructure

Newhaven			
Focus Area	Recommendation	Priority	Stakeholders
Passenger Facilities	<ul style="list-style-type: none"> Floating Pontoon Enhancements: Explore options for an extended covered gangway to protect passengers from adverse weather during tendering operations. 	High	Local council, port operators, Cruise Forth
	<ul style="list-style-type: none"> Temporary Shelter and Seating Areas: Provide temporary seating and wet-weather shelters near the tender landing area. 	High	Local council, Cruise Forth, contractors
Public Restroom Improvements	<ul style="list-style-type: none"> Review and upgrade existing public restrooms near the harbour to ensure they are clean, accessible, and open during cruise arrivals. 	Medium	Local council, port authorities, facilities management

²³ New toilet facilities due for completion May 2025 at west end of Hawes parking

Newhaven			
Focus Area	Recommendation	Priority	Stakeholders
Parking and Accessibility	<ul style="list-style-type: none"> • Coach and Shuttle Access: Ensure sufficient space for independent excursion buses and shuttles without impeding local traffic. 	High	Transport providers, port operators, local councils
	<ul style="list-style-type: none"> • Pathway Improvements: Improve pathways from the tender pontoon to tram and bus routes, ensuring they are level, well-lit, and step-free for accessibility. 	High	Local council, accessibility groups, Cruise Forth
Independent Shore Excursion and Taxi Zones	<ul style="list-style-type: none"> • Dedicated Pick-Up Zones: Develop clearly marked zones for taxis and ride-hailing services to minimise congestion during tendering operations. 	High	Local council, taxi operators, Cruise Forth
	<ul style="list-style-type: none"> • Explore real-time digital boards to show estimated taxi arrival times and ride-hailing queues. 	Medium	Local council, transport tech providers, port operators

Table 25 Leith Infrastructure

Leith			
Focus Area	Recommendation	Priority	Stakeholders
Passenger Facilities	<ul style="list-style-type: none"> • Visitor Information Point: Provide a permanent visitor information point for Cruise Forth volunteers, equipped with interactive screens for live updates. 	High	Cruise Forth, local councils, port operators
	<ul style="list-style-type: none"> • Improved Signage: Install multilingual signage guiding passengers to tram and bus stops, taxi pick-ups, and nearby attractions. 	High	Local councils, Cruise Forth, transport operators
Accessible Pathways	<ul style="list-style-type: none"> • Review and upgrade pedestrian pathways to ensure smooth, step-free access for passengers using wheelchairs or mobility aids. 	High	Accessibility groups, local councils, port operators
Independent Shore Excursion and Taxi Zones	<ul style="list-style-type: none"> • Dedicated Pick-Up Zones: Create a dedicated taxi rank and separate shuttle pick-up point to avoid congestion during peak embarkation/disembarkation. 	High	Local councils, taxi operators, transport providers
Digital Information Boards	<ul style="list-style-type: none"> • Install electronic boards at all ports displaying real-time updates on ship departure times, transport schedules, and weather alerts. 	Medium	Port operators, local councils, tech providers
Enhanced Wayfinding Signage	<ul style="list-style-type: none"> • Implement multilingual signage with wayfinding icons to improve navigation for international passengers. 	Medium	Local councils, Cruise Forth, tourism bodies
Community and Business Partnerships	<ul style="list-style-type: none"> • Collaborate with local businesses to provide pop-up markets or food stalls near disembarkation points, offering passengers an authentic local experience. 	Medium	Local businesses, Cruise Forth, tourism associations

Table 26 Wifi Infrastructure

Wi-Fi Access (South Queensferry and Newhaven,)			
Focus Area	Recommendation	Priority	Stakeholders
Wi-Fi Access	<ul style="list-style-type: none"> • Mobile Wi-Fi Hotspots: Partner with local providers to install mobile Wi-Fi hotspots at key passenger waiting areas, such as the X99 boarding point and volunteer information booth. 	High	Local councils, Wi-Fi providers, Cruise Forth
	<ul style="list-style-type: none"> • Permanent Public Wi-Fi: Integrate a permanent public Wi-Fi network into the new visitor centre and extend coverage to key areas, including the pier, pick-up/drop-off zones, and parking areas. 	High	Port operators, local councils, telecom providers
	<ul style="list-style-type: none"> • Signage and QR Codes: Provide clear signage indicating Wi-Fi access points and include QR codes for fast and easy network connection. 	Medium	Local councils, Cruise Forth, port operators

17.2.4 Shore Excursions

Organised and independent shore excursions are essential for delivering a well-rounded cruise passenger experience and supporting the local economy. Organised excursions provide convenience, safety, and curated cultural insights, while independent excursions offer flexibility for passengers and can lead to higher spending at local shops, cafes, and attractions.

Recent trends in cruise tourism show a growing preference among passengers for independent exploration rather than traditional organised shore excursions. This shift reflects changing traveller expectations and has implications for local tourism infrastructure, businesses, and cruise operations.

However, there is a clear trend among organised shore excursions towards offering more authentic and immersive experiences. Modern cruise passengers, particularly those in luxury and expedition segments, are increasingly seeking cultural depth, unique local encounters, and experiences that go beyond typical sightseeing.

To meet the demand for more authentic, flexible, and sustainable shore excursions, businesses must adapt through partnerships, improved services, and enhanced customer engagement.

Table 27 Shore Excursion Development

Focus Area	Recommendation	Priority	Stakeholders
Business Engagement	<ul style="list-style-type: none"> • Cruise Line Partnerships: Collaborate with cruise lines to create unique excursions that combine guided experiences with free exploration. 	High	Cruise Forth, cruise operators, local councils
	<ul style="list-style-type: none"> • Local Involvement: Engage artisans, communities, and cultural groups to offer workshops, markets, and behind-the-scenes experiences. 	High	Cruise Forth, local businesses, cultural groups
	<ul style="list-style-type: none"> • Transport Coordination: Work with transport providers to align services with cruise schedules and improve pick-up/drop-off logistics. 	High	Transport providers, local councils, Cruise Forth

Focus Area	Recommendation	Priority	Stakeholders
	<ul style="list-style-type: none"> Digital Access: Use digital platforms to promote services and provide tools such as maps, QR codes, and excursion apps for independent travellers. 	Medium	Digital service providers, Cruise Forth, tourism bodies
Training Requirements	<ul style="list-style-type: none"> Authentic Storytelling: Train guides to enhance tours with local history and storytelling techniques. 	High	Tour operators, Cruise Forth, local guides
	<ul style="list-style-type: none"> Accessibility: Equip guides and businesses to accommodate visitors with mobility challenges and special needs. 	High	Accessibility groups, Cruise Forth, local operators
	<ul style="list-style-type: none"> Digital Skills: Support operators in using digital tools for online booking, real-time updates, and self-guided tours. 	Medium	Digital trainers, Cruise Forth, local tour providers

Enhanced engagement and targeted training will help businesses deliver memorable excursions that meet evolving visitor expectations, boost local spending, and strengthen the region’s appeal as a sustainable cruise destination.

17.2.5 Community Impact Recommendations

The following recommendations outline actionable steps to enhance the positive impact that the cruise industry could have on local communities while addressing existing challenges. They are designed to balance economic, social, and environmental priorities, and ensure that the local communities can maximise their potential as vibrant, sustainable destinations.

By drawing on local strengths, fostering collaboration, and addressing infrastructure and environmental concerns, these strategies aim to create lasting benefits for both residents and visitors. Each recommendation focuses on fostering inclusive growth, preserving cultural heritage, and promoting responsible tourism practices.

Table 28 Community Impact Actions

Focus Area	Recommendation	Priority	Stakeholders
Strategic Development	<ul style="list-style-type: none"> Tailored Cruise Tourism Strategies: Develop strategies for South Queensferry and Newhaven that leverage their unique strengths and address challenges, linking cruise visits to broader regional development plans. 	High	Local councils, Cruise Forth, port operators, regional development bodies
Enhanced Engagement	<ul style="list-style-type: none"> Community-Cruise Industry Relationships: Foster direct relationships between the cruise industry and local communities to improve communication, planning, and mutual benefits. 	High	Cruise operators, local councils, Cruise Forth, community groups
	<ul style="list-style-type: none"> Marketing Local Attractions: Develop a coordinated approach to promote local attractions (e.g., historical sites, walking tours, niche shops) to cruise operators and visitors. 	Medium	Cruise Forth, local businesses, tourism boards
Community Integration	<ul style="list-style-type: none"> Volunteer Support: Provide facilities, funding, or incentives for volunteers to support their roles in welcoming and guiding visitors effectively. 	High	Local councils, Cruise Forth, volunteer groups

Focus Area	Recommendation	Priority	Stakeholders
	<ul style="list-style-type: none"> Community Participation: Encourage local communities to participate in tourism activities, ensuring shared benefits from cruise tourism. 	Medium	Community groups, Cruise Forth, tourism associations
Environmental and Infrastructure Solutions	<ul style="list-style-type: none"> Sustainability Advocacy: Promote sustainable practices within the cruise industry and ensure future tourism decisions consider environmental impacts. 	High	Environmental agencies, cruise operators, local councils
	<ul style="list-style-type: none"> Pedestrian Infrastructure: Improve pedestrian routes, traffic management, and public amenities to handle cruise-related pressures more effectively. 	High	Local councils, transport authorities, Cruise Forth

17.2.6 Cruise Passenger Levy

A cruise ship passenger levy has the potential to generate financial and environmental benefits, but careful planning is essential to mitigate risks and maintain Edinburgh’s competitiveness as a cruise destination. A data-driven approach, strong stakeholder engagement, and alignment with broader tourism and sustainability goals will be critical if implemented.

Additional work is required to fully assess the potential impacts of the levy, including its effect on cruise itineraries, passenger behaviour, and the wider tourism economy. To support informed decision-making, the following key actions are recommended for evaluating the feasibility and effectiveness of a cruise passenger levy.

Action	Recommendation
Revenue Forecasting:	Model potential revenue based on different levy and passenger numbers.
Competitiveness Analysis	Assess the impact of a levy compared to other ports.
Potential Passenger Drop-off	Conduct scenario planning to estimate how the levy might influence cruise line decisions and visitor numbers.
Stakeholder Consultations	Engage Cruise Operators: Discuss potential impacts with cruise lines to gauge industry response.
	Consult Local Businesses & Attractions: Assess potential impacts on businesses reliant on cruise tourism.
	Community Engagement: Gather resident input on cruise tourism and potential benefits or concerns about a levy.

17.2.7 Capacity Issues

As cruise tourism continues to grow, managing passenger capacity across Edinburgh and the South East Scotland region is essential to balancing economic benefits, visitor experience, community impact, and infrastructure limitations. While cruise arrivals contribute significantly to the regional economy, peak-season congestion—particularly in August during Edinburgh’s festivals—raises concerns about infrastructure strain, transport capacity, and the dispersal of visitors beyond traditional hotspots.

A coordinated approach is required to ensure that ports, transport networks, and tourism businesses can accommodate cruise passengers efficiently while maintaining sustainability and community well-being. By working collaboratively with cruise operators, local authorities, and tourism stakeholders, the region can optimize scheduling, dispersal strategies, and overall visitor experience.

Rather than imposing outright restrictions on cruise ship numbers, Edinburgh and South East Scotland should adopt a managed growth strategy that prioritizes sustainability, visitor experience, and regional economic benefits. Key considerations include:

- **Peak-Season Congestion:** August already experiences high visitor volumes due to Edinburgh’s festivals, straining infrastructure, transport, and attractions. Limiting new cruise bookings during this period or introducing a tiered scheduling system could help manage capacity.
- **Passenger Dispersal:** Encouraging ships to call at alternative ports such as Rosyth, South Queensferry and Eyemouth, while developing shore excursions beyond Edinburgh to destinations in Fife, the Scottish Borders, and the Lothians, can alleviate pressure on the capital.
- **Ship Type and Size:** Prioritizing smaller, boutique, and expedition ships with high-value, low-impact passengers aligns with the region’s sustainable tourism goals while maximizing economic benefits.
- **Environmental and Infrastructure Considerations:** Implementing environmental standards and collaborating with cruise operators on sustainability measures (such as shore power and emissions reduction) could provide an alternative to restricting ship numbers outright.

By integrating capacity management, passenger dispersal, and sustainability initiatives, the region can maximize the benefits of cruise tourism while mitigating its challenges, ensuring a thriving and responsible cruise industry that supports both visitors and local communities.

17.2.8 Cruise Ready Actions

To maximize the benefits of cruise tourism while ensuring sustainability and community engagement, Edinburgh and South East Scotland must enhance business readiness and visitor management. Table 27 below identifies Cruise-Ready Actions focus on business development, visitor experience, regional dispersal, and sustainability, ensuring a balanced and competitive cruise tourism approach.

Table 29 Cruise Ready Actions

Region	Readiness Level	Key Findings	Recommendations	Lead Organisation	Key Stakeholders
Edinburgh	High	<ul style="list-style-type: none"> • Many tourism businesses already serve cruise passengers, particularly in retail, hospitality, and cultural sectors. • High competition; businesses need to differentiate themselves for cruise visitors. • Better understanding of cruise schedules, passenger demographics, and pre-booking behaviours is needed. 	<ul style="list-style-type: none"> • Provide tailored training for businesses on cruise visitor engagement. • Improve access to real-time cruise scheduling and passenger data. • Develop digital tools and marketing campaigns targeting independent travellers. 	ETAG	Cruise Forth, City of Edinburgh Council, Forth Ports, local businesses, shore excursion operators
Fife	Medium	<ul style="list-style-type: none"> • St Andrews and Dunfermline have strong tourism 	<ul style="list-style-type: none"> • - Facilitate engagement between Fife 	Welcome to Fife (Fife Council)	Cruise Forth, VisitScotland, Dunfermline

Region	Readiness Level	Key Findings	Recommendations	Lead Organisation	Key Stakeholders
		<p>infrastructure and are major attraction for cruise visitors.</p> <ul style="list-style-type: none"> • Other areas of Fife are less engaged. • Limited cruise-specific training and product development for small group tours. 	<p>tourism businesses and shore excursion providers.</p> <ul style="list-style-type: none"> • Promote Dunfermline as a heritage destination. • Offer cruise tourism workshops. • Improve transport connections from cruise ports. 		<p>Heritage Partnership, St Andrews Tourism Association, Forth Ports, transport providers, shore excursion operators</p>
East Lothian	Low-Medium	<ul style="list-style-type: none"> • - Strong potential for heritage, nature, and food & drink experiences but lacks significant cruise engagement. • Few local businesses are connected to the cruise trade. • Need for targeted business support and marketing. 	<ul style="list-style-type: none"> • Identify and develop key shore excursions focusing on food, whisky, and outdoor nature experiences. • Strengthen partnerships with cruise lines and tour operators. 	Visit East Lothian (East Lothian Council)	Cruise Forth, VisitScotland, local tourism businesses, transport providers, heritage organisations
West Lothian	Low	<ul style="list-style-type: none"> • Linlithgow Palace and whisky experiences offer good potential, but businesses lack awareness of cruise tourism opportunities. • Transport connections from cruise ports need improvement. • Businesses require training on tailoring offerings for cruise visitors. 	<ul style="list-style-type: none"> • Develop shore excursions incorporating Linlithgow Palace and whisky experiences. • Improve awareness among local businesses. • Work with transport providers to improve connections. 	Visit West Lothian (West Lothian Council)	Cruise Forth, VisitScotland, Historic Environment Scotland, local distilleries, transport providers, shore excursion operators
Midlothian	Low	<ul style="list-style-type: none"> • Rosslyn Chapel is already included in 	<ul style="list-style-type: none"> • Expand excursion 	Midlothian Tourism	Cruise Forth, VisitScotland,

Region	Readiness Level	Key Findings	Recommendations	Lead Organisation	Key Stakeholders
		<p>some shore excursions, but the wider region lacks cruise engagement.</p> <ul style="list-style-type: none"> Potential for outdoor, heritage, tourism experiences. Improved marketing and visitor dispersal strategies required. 	<p>options beyond Rosslyn Chapel.</p> <ul style="list-style-type: none"> Provide training for local businesses on cruise visitor engagement. 	Forum (Midlothian Council)	Rosslyn Chapel Trust, local tourism businesses, adventure activity providers
Scottish Borders	Low	<ul style="list-style-type: none"> Significant untapped potential for history, rural tourism, and nature-based experiences, but almost no engagement with cruise tourism. Lack of direct transport options from cruise ports. Small businesses need support in developing cruise-friendly products. 	<ul style="list-style-type: none"> Establish transport links from cruise ports to key attractions. Develop history and nature-based shore excursions. Provide support for small tourism businesses to create cruise-ready products. Strengthen partnerships with tour operators. 	SSDA	Cruise Forth, local tourism businesses, transport providers, VisitScotland, shore excursion operators

17.2.9 Data-Driven Innovation (DDI)

Recommendations for a DDI approach to information gathering to support managing of Cruise Ship arrivals to the Forth have been developed with input from Joshua Ryan-Saha, Director – Traveltech, Edinburgh Futures Institute.

Table 30 DDI Actions

Activity	Recommendation	Timescale	Stakeholders
Immediate Actions (0-6 months)			
Audit Existing Data Sources	<ul style="list-style-type: none"> Conduct a comprehensive audit of current data sources and their utilisation, including qualitative insights from 	0-3 months	Cruise Forth, Local Councils, Port Operators, Data Specialists

Activity	Recommendation	Timescale	Stakeholders
	stakeholder interviews.		
Identify Critical Information Gaps	<ul style="list-style-type: none"> Identify key gaps in data that hinder operational efficiency and visitor management. 	0-3 months	Cruise Forth, Research Institutions, Local Councils
Establish Information-Sharing Protocols	<ul style="list-style-type: none"> Implement basic but effective protocols for information-sharing and ensure they are well-communicated and practical for all stakeholders. 	3-6 months	Local Councils, Cruise Forth, Port Operators
Develop Simple Dashboards	<ul style="list-style-type: none"> Create basic dashboards with actionable insights for stakeholders, using currently available data sources. 	3-6 months	Data Specialists, Cruise Forth, Local Councils

Activity	Recommendation	Timeline	Stakeholders	Priority
Medium-Term Options (6-18 months)				
Deploy Targeted Sensor Networks	<ul style="list-style-type: none"> Identify needs for sensor networks (e.g., visitor flow, environmental monitoring) and conduct pilot studies to test feasibility and effectiveness. 	6-12 months	Research Institutions, Local Councils, Cruise Forth	High
Automated Alerting Systems	<ul style="list-style-type: none"> Develop real-time alerting systems to improve operational responses and provide stakeholders with timely updates. 	12-18 months	Cruise Forth, Local Councils, IT Providers	High
Form Data Partnerships	<ul style="list-style-type: none"> Establish partnerships with universities, local authorities, and private data platforms to enable deeper analysis of visitor impacts and economic contributions. 	6-12 months	Universities, Local Councils, Private Data Platforms	High
Standardised Reporting Frameworks	<ul style="list-style-type: none"> Create consistent reporting templates to ensure data is comparable and easy to use across stakeholders. 	12-18 months	Cruise Forth, Research Institutions, Tourism Boards	Medium
Data Storytelling and Visualisation	<ul style="list-style-type: none"> Develop user-friendly data visualisations and narratives to demonstrate the value of data-driven insights and engage stakeholders. 	12-18 months	Data Specialists, Cruise Forth, Local Authorities	Medium

Activity	Recommendation	Timeline	Stakeholders	Priority
Longer-Term Options (18 – 36 Months)				
Real-Time Visitor Flow Management	<ul style="list-style-type: none"> Implement real-time monitoring systems to track visitor movement and use predictive analytics for resource allocation, following feasibility studies and pilot projects. 	18-24 months	Transport Providers, Cruise Forth, Local Councils	High
Integrated Collaboration Platforms	<ul style="list-style-type: none"> Build modular, scalable digital platforms that enable stakeholders to collaborate and share information seamlessly. 	18-24 months	Cruise Forth, Local Councils, IT Providers, Tourism Bodies	High
Automated Decision-Support Systems	<ul style="list-style-type: none"> Transition from manual processes to automated decision-support systems as data infrastructure and technical capabilities mature. 	24-36 months	Cruise Forth, IT Specialists, Transport Operators	Medium

17.2.10 Crisis Management Plan

There is a need for a Crisis Management and Contingency Plan specifically tailored for cruise tourism in the region. With five ports and multiple local authorities involved, a coordinated and robust plan is essential to ensure an effective response to disruptions in essential services or operations within Edinburgh and the surrounding areas.

A well-structured contingency plan would:

- **Ensure Passenger Safety and Well-being:** Provide clear procedures for accommodating and supporting passengers during disruptions, including alternative transportation, accommodation, and communication strategies.
- **Minimize Impact on Local Communities:** Avoid overwhelming local resources and mitigate the effects of large numbers of stranded passengers on community services and infrastructure.
- **Protect the Region’s Reputation:** A proactive, coordinated response to incidents would maintain Edinburgh’s standing as a premier cruise destination, demonstrating reliability and readiness in crisis scenarios.
- **Clarify Roles and Responsibilities:** Establish clear roles for key stakeholders, including Forth Ports, local authorities, emergency services, cruise operators, and community partners, to ensure seamless collaboration and avoid gaps in response.

A comprehensive contingency plan would enhance resilience and preparedness, safeguarding the visitor experience while reinforcing trust among cruise operators, passengers, and the local community.

17.2.11 Short-Term Actions with No / Limited Costs

These actions can be implemented immediately without requiring additional financial resources. They leverage existing structures, partnerships, and digital tools to enhance cruise tourism management and regional economic benefits.

Table 31 Short Term Actions

Action	Details	Lead Organisation	Key Stakeholders	Estimated Cost
Strengthen Business Engagement	<ul style="list-style-type: none"> Organize virtual networking sessions between local businesses and shore excursion operators to explore opportunities for inclusion in tour itineraries. 	Cruise Forth	Local Businesses, Shore Excursion Operators, Business Networks	No Cost

Action	Details	Lead Organisation	Key Stakeholders	Estimated Cost
	<ul style="list-style-type: none"> Facilitate knowledge-sharing sessions where successful businesses engaging with cruise passengers share insights with those new to the sector. 			
Improve Cruise Passenger Information	<ul style="list-style-type: none"> Enhance existing digital content (websites, social media, local business platforms) with more cruise-specific information, such as recommended independent excursions. Provide downloadable walking route maps or QR codes at key arrival points linking to local attraction information. 	Cruise Forth	Local Councils, Digital Content Providers, Tourism Bodies	Limited Cost (QR Code Setup & Digital Updates: ~£2,000)
Leverage Existing Volunteer Networks	<ul style="list-style-type: none"> Encourage greater volunteer involvement at ports and anchorages to provide wayfinding and visitor guidance. Organize familiarization sessions for volunteers to strengthen their knowledge of lesser-known regional destinations. 	Cruise Forth	Volunteer Networks, Local Tourism Groups	No Cost
Coordinate Cruise Stakeholder Communications	<ul style="list-style-type: none"> Develop a structured communication plan for sharing cruise ship schedules and visitor impact forecasts with local businesses and communities. Encourage collaboration between port operators, councils, and tourism bodies to align messaging about cruise tourism benefits and management. 	Cruise Forth	Forth Ports, Local Councils, Tourism Bodies	No Cost
Maximize Off-Peak Excursion Promotion	<ul style="list-style-type: none"> Work with excursion operators to identify ways to schedule tours at less congested times or promote alternative attractions beyond peak locations. 	Shore Excursion Operators	Cruise Forth, Local Tourism Groups, Destination Management Organisations	No Cost

Action	Details	Lead Organisation	Key Stakeholders	Estimated Cost
	<ul style="list-style-type: none"> Share best practices from other destinations that have successfully managed visitor dispersal. 			
Enhance Coordination with Shore Excursion Operators	<ul style="list-style-type: none"> Initiate direct dialogue with shore excursion companies to identify gaps in product offerings and explore new excursion ideas using existing infrastructure. Encourage independent tour providers to list their services on platforms used by cruise passengers (e.g., Viator, GetYourGuide). 	Cruise Forth	Shore Excursion Operators, Independent Tour Providers, Online Travel Agencies	No Cost
Review and Improve Signage	<ul style="list-style-type: none"> Conduct an audit of existing signage at ports and surrounding areas to ensure clarity in directing passengers to transport and key attractions. Work with local authorities to improve visibility of walking routes and public transport information near cruise arrival points. 	Local Councils	Cruise Forth, Forth Ports, Transport Authorities	Limited Cost (Signage Audit & Minor Updates: ~£5,000)

18. Conclusions

Edinburgh and the South East Scotland region are in a strong position to maximize the benefits of cruise tourism, having already undertaken strategic regional work to assess its economic impact, visitor management needs, and future sustainability. Unlike many other destinations facing growing cruise tourism pressures, this proactive approach allows the region to make informed decisions on managing cruise arrivals while ensuring that benefits are equitably distributed among visitors, businesses, and local communities.

One of the key considerations emerging from this work is the potential introduction of a cruise passenger levy. While such a levy has the potential to generate new revenue streams that could be reinvested into essential tourism infrastructure, environmental sustainability initiatives, and community engagement programs, careful implementation is required to avoid unintended consequences. If set too high or introduced without industry alignment, a levy could reduce Edinburgh and South East Scotland's competitiveness as a cruise destination, potentially discouraging visits from cruise lines and independent passengers. A well-structured levy, however, could provide a sustainable funding source to enhance the visitor experience, develop regional tourism opportunities, and mitigate any negative impacts associated with high visitor numbers.

The findings from this study have been highlighted as a key consideration in the City of Edinburgh Council's report to the Policy & Sustainability Committee, emphasizing the need for a balanced and strategic approach to cruise tourism investment. This reinforces the importance of targeted infrastructure enhancements, improved transport links, and stronger business engagement across the wider region to ensure that the economic, cultural, and environmental benefits of cruise tourism are fully realized.

At the same time, caution must be exercised when considering further expansion of visitor numbers. With visitor volume already peaking during the Edinburgh Festival season, managing capacity—rather than simply increasing arrivals—should be a priority. Investment should focus on visitor dispersal strategies, encouraging cruise passengers to explore beyond Edinburgh to destinations across Fife, the Lothians, and the Scottish Borders, thereby easing congestion in the city while stimulating economic activity in under-visited areas.

Ultimately, the region is in a favourable position to take a leadership role in sustainable cruise tourism management. By leveraging the insights from this report, aligning with national and local tourism strategies, and securing investment for strategic improvements, Edinburgh and South East Scotland can ensure that cruise tourism continues to deliver long-term benefits while maintaining the region's appeal as a world-class visitor destination.

19. Next Steps

The following are the suggested next steps to enhance the sustainability, economic impact, and inclusivity of cruise tourism across Edinburgh and South East of Scotland region.

Table 32 Next Steps

Recommendation	Actions	Timeline	Cost Implications	Lead Organisation	Key Stakeholders
1. Establish Governance and Collaboration Structures	Form a Cruise Tourism Working Group; Appoint a Lead Coordinator; Define roles and responsibilities	0-3 months	Nil (existing structures)	Forth Ports, CruiseForth	Local authorities, VisitScotland, tourism businesses, transport providers, shore excursion operators
2. Improve Visitor Dispersal and Experience	Enhance transport connectivity; Develop digital visitor tools; Strengthen shore excursion partnerships; Pilot new regional excursions	3-12 months	Medium(marketing, digital development)	Transport Scotland, CruiseForth, Forth Ports	Local councils, transport providers, tour operators, community groups
3. Strengthen Business and Community Engagement	Launch a Travel Trade Ready Programme; Conduct business workshops; Develop new excursions; Expand business participation; Strengthen community involvement	6-18 months	Medium-High(training, marketing, program facilitation)	Cruise Forth, VisitScotland, Local Authorities	Tourism businesses, business networks, local communities, cultural groups
4. Develop Cruise Forth's Role	Secure long-term funding; Expand operational model; Enhance volunteer	6-24 months	High(staffing, digital infrastructure)	Cruise Forth	Forth Ports, VisitScotland, funding bodies, tourism industry

Recommendation	Actions	Timeline	Cost Implications	Lead Organisation	Key Stakeholders
	training; Develop central information hub				
5. Infrastructure Planning and Development	Secure funding for port improvements; Develop phased improvement plan for Hawes Pier; Assess sustainability initiatives; Improve signage and passenger welcome areas	12-36 months	High (£M+ for major port works)	Forth Ports, Local Councils, Scottish Government	Transport Scotland, tourism industry, community groups
6. Implement Data-Driven Monitoring and Continuous Improvement	Establish visitor monitoring; Develop feedback mechanisms; Review and adjust priorities; Measure economic and social impacts	Ongoing	Medium(data systems, research funding)	CruiseForth, VisitScotland, Local Authorities	Universities, business groups, cruise operators
7. Expand Wider Business Engagement and Industry Collaboration	Engage with cruise trade events; Facilitate networking; Develop marketing partnerships with cruise lines; Encourage cruise-friendly services	Ongoing	Medium(trade show participation, marketing)	VisitScotland, CruiseForth	Local businesses, cruise lines, industry groups

20. Action Plan

This section outlines key actions to enhance the region's cruise tourism infrastructure, operational capacity, and visitor experience. Each recommendation includes estimated investment requirements and potential funding sources to guide implementation. The proposed actions focus on critical areas such as port infrastructure, business engagement, and sustainable tourism development, ensuring a comprehensive approach to strengthening the sector. It is important to note that the cost estimates provided are preliminary and based on available information; no detailed feasibility studies or cost analyses have been conducted at this stage.

The actions identified are:

1. Cruise Forth
2. Port Infrastructure Improvements
3. Sustainability

Disclaimer: The cost estimates provided are preliminary and based on industry benchmarks and similar initiatives. No detailed financial analysis, feasibility study, or site-specific assessment has been conducted at this stage. Actual costs may vary depending on implementation strategies, resource availability, stakeholder involvement, site conditions, design specifications, and contractor bids.

Cruise Forth

To ensure the long-term sustainability and effectiveness of CruiseForth in supporting cruise tourism, several strategic actions have been identified. These actions aim to enhance Cruise Forth's operational capacity, expand its engagement with local businesses, and secure stable funding sources. By addressing current challenges and leveraging opportunities, CruiseForth can strengthen its role as a central coordinator and promoter of cruise tourism in the region.

Recommendation	Action	Priority	Stakeholders	Estimated Cost	Timeline	Potential Funding Sources	Report Reference
Expand Organisational Capacity	Explore opportunity to secure additional funding and staff to manage operations, volunteer coordination, and stakeholder relationships.	High	Cruise Forth, CEC, Fife Council, VisitScotland, Technology Providers	£50,000 - £75,000	0-24 months	Government Grants, Private Philanthropy, Corporate Sponsorships	Section 17.2.1
	Invest in technology for scheduling, engagement, and data analysis.	High	Cruise Forth, Technology Providers	£37,500 - £62,500	0-24 months	Technology Grants, Business Investment, Digital Innovation Funds	Section 17.2.1
	Establish Cruise Forth as a knowledge hub for cruise tourism insights and trends.	High	Cruise Forth	£12,500 - £25,000	0-24 months	Tourism Boards, Industry Partnerships, Academic Research Grants	Section 17.2.1
	Continue to deliver and	High	Cruise Forth, CEC, Fife	£12,500 - £25,000	0-24 months	Training & Education	Section 17.2.1

Recommendation	Action	Priority	Stakeholders	Estimated Cost	Timeline	Potential Funding Sources	Report Reference
	expand training programs for businesses, communities, and volunteers.		Council, VisitScotland			Grants, Business Support Funds	
Strengthen Stakeholder Collaboration	Build partnerships with cruise lines to gather data on passenger demographics and interests.	High	Cruise Forth, Cruise Lines	£12,500 - £25,000	0-24 months	Cruise Line Contributions, Data Sharing Partnerships	Section 17.2.1
	Collaborate with transport providers and Forth Ports to improve passenger flow and facilities.	High	Cruise Forth, Transport Providers, Forth Ports	£12,500 - £25,000	0-24 months	Infrastructure Grants, Transport Sector Partnerships	Section 17.2.1
	Work with local businesses to develop tailored cruise-friendly offerings.	High	Cruise Forth, Local Businesses, Local Authorities	£12,500 - £25,000	0-24 months	Local Business Associations, Economic Development Funds	Section 17.2.1
Develop and Promote Shore Excursions	Develop a Cruise Tourism Excursion Accelerator Programme to create exclusive tours.	Medium	Cruise Forth, Local Attractions, Tour Operators	£12,500 - £25,000	24-36 months	Tourism Development Funds, Local Enterprise Support	Section 17.2.4
	Promote excursions through pre-arrival materials, onboard marketing, and digital platforms.	Medium	Cruise Forth, Cruise Lines	£12,500 - £25,000	24-36 months	Cruise Line Marketing Partnerships, Destination Promotion Grants	Section 17.2.4
Volunteer Program	Expand the volunteer base, focusing on multilingual capabilities and expertise.	Low	Cruise Forth, Community Groups, Volunteer Networks	£12,500 - £25,000	24-36 months	Community Grants, Volunteer Organizations	Section 17.2.5
Marketing and Branding	Upgrade digital platforms with real-time updates and personalized itineraries.	High	Cruise Forth, Digital Marketing Agencies	£12,500 - £25,000	0-24 months	Digital Transformation Funds, Marketing Grants	Section 17.2.1

Recommendation	Action	Priority	Stakeholders	Estimated Cost	Timeline	Potential Funding Sources	Report Reference
	Collaborate with cruise lines to market attractions and excursions.	High	Cruise Forth, Cruise Lines	£12,500 - £25,000	0-24 months	Cruise Line Co-Marketing Funds, Tourism Promotion Grants	Section 17.2.1
	Develop digital campaigns targeting independent passengers to encourage higher passenger spending and linger longer.	High	Cruise Forth, Digital Marketing Agencies, VisitScotland, Local Authorities	£12,500 - £25,000	0-24 months	Destination Marketing Funds, Regional Development Grants	Section 17.2.1
Regional Leadership	Support green port developments.	High	Cruise Forth, Environmental Groups, Local Councils	£50,000 - £100,000	36-48 months	Environmental Grants, Public-Private Partnerships	Section 17.2.1
	Develop eco-friendly excursions showcasing the region's natural environment.	High	Cruise Forth, Environmental Groups, Local Councils	£12,500 - £25,000	36-48 months	Eco-Tourism Grants, Sustainable Development Funds	Section 17.2.1
	Position Cruise Forth as a leader in sustainable cruise tourism through advocacy and collaboration.	High	Cruise Forth, Regional (Scotland-wide) Cruise Organizations	£12,500 - £25,000	36-48 months	Sustainability Advocacy Grants, Tourism Councils	Section 17.2.1
Community Representation	Continue to be the liaison between cruise operators and local communities.	Medium	Cruise Forth, Local Communities, Cultural Organizations	£12,500 - £25,000	24-36 months	Community Development Grants, Cultural Heritage Funds	Section 17.2.1
	Promote initiatives encouraging passengers to engage with local artisans, businesses, and cultural sites.	Medium	Cruise Forth, Local Businesses, Local Authorities	£12,500 - £25,000	24-36 months	Artisan Support Funds, Local Business Growth Funds	Section 17.2.1

Funding Summary by Recommendations, and Costs

Recommendation	Estimated Cost (£)	Potential Funding Sources	Timeline
Expand Organisational Capacity (Funding for staff, volunteer coordination, training, stakeholder engagement)	£112,500 - £187,500	Government Grants, Private Philanthropy, Corporate Sponsorships	0-24 months
Strengthen Stakeholder Collaboration (Data-sharing, transport coordination, local business engagement)	£37,500 - £75,000	Cruise Line Contributions, Data Sharing Partnerships, Infrastructure Grants	0-24 months
Develop and Promote Shore Excursions (Cruise Tourism Excursion Accelerator Programme & marketing)	£25,000 - £50,000	Tourism Development Funds, Local Enterprise Support	24-36 months
Expand Volunteer Program (Recruitment & multilingual training)	£12,500 - £25,000	Community Grants, Volunteer Organizations	24-36 months
Enhance Marketing and Branding (Digital platforms, pre-arrival marketing, independent traveller engagement)	£37,500 - £75,000	Digital Transformation Funds, Marketing Grants, Cruise Line Co-Marketing Funds	0-24 months
Support Regional Leadership in Sustainable Tourism (Green port development, eco-excursions, advocacy)	£75,000 - £150,000	Environmental Grants, Public-Private Partnerships, Sustainable Tourism Development Funds	36-48 months
Community Representation & Engagement (Business networking, local community involvement, artisan promotion)	£25,000 - £50,000	Community Development Grants, Local Business Growth Funds	24-36 months

Port Infrastructure Improvements

The following table outlines proposed infrastructure improvements across the Newhaven and South Queensferry (Hawes Pier)—to enhance the cruise passenger experience and operational efficiency. These improvements are designed to address current limitations, improve passenger flow, and support sustainable growth in cruise tourism.

Port	Focus Area	Infrastructure Improvement	Priority	Timeline	Stakeholders	Estimated Cost (£)	Potential Funding Sources	Description	Report Reference
Newhaven	Passenger Facilities	Develop a Small Cruise Terminal with Passenger Facilities	Medium	18-30 months	Local councils, Port operators, Cruise Forth	£2 million	Tourism infrastructure grants	Construct a modest terminal to improve passenger flow, including seating, information points, and shelter from weather conditions.	Section 17.2.3
Newhaven	Wayfinding & Transport	Improve Signage, Wayfinding, and Local Transport Connections	High	6-12 months	Local councils, Transport providers	£300,000	Sustainable transport grants	Enhance signage and wayfinding for independent travelers, including introducing electric shuttle services to reduce congestion.	Section 17.2.3
South Queensferry	Port Infrastructure	Expand Tender Facilities and Waiting Areas at Hawes Pier	High	6-12 months	Local councils, Cruise Forth, Port operators	£1.5-2 million	Local government and tourism grants	Increase the capacity of tender operations, improve pier accessibility, and develop sheltered waiting areas for passengers.	Section 17.2.3
South Queensferry	Transport	Improve Road Infrastructure and Traffic Management	Medium	12-24 months	Local councils, Transport providers	£3 million	Local transport grants	Upgrade local roads and implement better traffic flow systems to handle peak cruise traffic, reducing	Section 17.2.3

Port	Focus Area	Infrastructure Improvement	Priority	Timeline	Stakeholders	Estimated Cost (£)	Potential Funding Sources	Description	Report Reference
								impact on local residents.	
South Queensferry	Parking	Develop Dedicated Coach and Shuttle Parking	Medium	9-18 months	Local councils, Transport providers, Cruise Forth	£500,000	Infrastructure funding	Create organized parking zones for shore excursion buses to reduce congestion and improve visitor flow.	Section 17.2.3
South Queensferry	Passenger Facilities	Enhance access and waiting areas at the X99 boarding location.	High	6-12 months	Local councils, Cruise Forth, Transport providers	£50,000 - £100,000	Local council funds, tourism boards	Improve waiting areas for smoother passenger transitions.	Section 17.2.3
South Queensferry	Visitor Services	Establish a Temporary Visitor Information Point for Cruise Forth Volunteers	High	Short-Medium Term	Cruise Forth, City of Edinburgh Council, Coastguard	£25,000 - £50,000	Tourism board funding, volunteer organization grants	Provide passenger assistance and information.	Section 17.2.3
South Queensferry	Visitor Centre	Develop a High-Quality Visitor Centre Integrated with the Forth Bridge Experience	High	Long Term	Network Rail, Cruise Forth, National Heritage Groups	£250,000 - £500,000	Heritage grants, infrastructure funding	Create a permanent facility with restrooms, shelter, and educational exhibits.	Section 17.2.3
South Queensferry	Waiting Areas	Provide Covered Seating Areas for Passengers	High	6-12 months	City of Edinburgh Council, Cruise Forth	£37,500 - £75,000	Local authority infrastructure grants	Increase passenger comfort with sheltered seating.	Section 17.2.3

Port	Focus Area	Infrastructure Improvement	Priority	Timeline	Stakeholders	Estimated Cost (£)	Potential Funding Sources	Description	Report Reference
South Queensferry	Parking	Expand Parking Facilities for Volunteers and Staff	Medium	6-12 months	Local councils, Transport providers, Port operators	£25,000 - £50,000	Local transport initiatives	Improve logistics for support personnel.	Section 17.2.3
South Queensferry	Toilet Facilities	Install Modular Toilet Units and Develop Permanent Restrooms	High	6-12 months	City of Edinburgh Council, Private contractors	£75,000 - £150,000	Public sanitation funding	Increase restroom availability for peak cruise season.	Section 17.2.3
South Queensferry / Newhaven	Wi-Fi Access Connectivity	Install Mobile Wi-Fi Hotspots and Expand Permanent Public Networks	High	6-12 months	Local councils, Wi-Fi providers, Cruise Forth	£50,000 - £100,000	Telecom sponsorships, infrastructure grants	Improve digital connectivity for passengers and staff.	Section 17.2.3

Funding Summary by Port, Timelines, and Costs

Port	Category	Estimated Cost (£)	Potential Funding Sources	Timeline
Newhaven	Transport Infrastructure	£300,000	Local government grants, transport subsidies, port investments	6-12 months
Newhaven	Passenger Facilities	£2 million	Tourism development funds, local council budgets, private investments	18-30 months
Newhaven	Wayfinding & Connectivity	£300,000	Sustainable transport grants, digital infrastructure grants	6-12 months
South Queensferry	Port Infrastructure	£1.5M - £2M	Government infrastructure funds, marine infrastructure grants	6-12 months
South Queensferry	Passenger Facilities	£50,000 - £100,000	Local council budgets, tourism board funding	6-12 months
South Queensferry	Transport Infrastructure	£3 million	Local transport grants, port investments	12-24 months
South Queensferry	Parking Infrastructure	£500,000	Local transport initiatives, infrastructure funding	9-18 months
South Queensferry	Waiting Areas & Toilets	£75,000 - £150,000	Public sanitation funding, local authority infrastructure grants	6-12 months
South Queensferry / Newhaven	Wi-Fi Access Technology & Connectivity	£50,000 - £100,000	Telecom sponsorships, digital infrastructure grants	6-12 months

Sustainable Cruise Tourism Initiatives

Action	Timeline	Priority	Key Stakeholders	Estimated Cost	Potential Funding Sources	Report Reference
Clarify and communicate in-destination environmental recommendations	Short-term (0-6 months)	High	Local authorities, Cruise Forth, Forth Ports, tourism boards	Low (<£10k for communications and reports)	Local Government Grants, Environmental Policy Funds	Section 17.2.2
Develop a sustainable transport plan, including electric shuttle buses and active travel routes	Medium-term (1-3 years)	High	Local transport providers, city councils, Forth Ports, Cruise Lines	£500k - £1M for vehicle procurement and infrastructure upgrades	Green Transport Grants, Infrastructure Development Funds, Public-Private Partnerships	Section 17.2.2
Enhance waste management and recycling facilities at key ports	Short-term (0-12 months)	High	Forth Ports, local councils, environmental agencies	£200k - £500k for facility upgrades	Waste Management Grants, Environmental Protection Funds	Section 17.2.2
Implement timed visitor access and crowd management strategies for environmentally sensitive sites	Medium-term (1-3 years)	Medium	Historic Scotland, NatureScot, local tourism boards	£50k - £100k for technology and operational support	Heritage and Conservation Grants, Sustainable Tourism Development Funds	Section 17.2.2
Increase green shore excursions and low-impact tourism experiences (e.g., wildlife tours, walking routes, cycling options)	Short-term (0-12 months)	High	Tour operators, Cruise Forth, VisitScotland, local businesses	£50k - £200k for development and marketing	Eco-Tourism Development Grants, Destination Marketing Funds	Section 17.2.2
Introduce shore power facilities at Newhaven and Leith to reduce cruise ship emissions	Long-term (3-5 years)	High	Forth Ports, Scottish Government, cruise operators	£15M - £30M for shore power infrastructure	Scottish Government, Cruise Line Investments, Sustainability Infrastructure Funds	Section 17.2.2
Strengthen environmental education and awareness campaigns for cruise passengers	Short-term (0-12 months)	Medium	Cruise Forth, VisitScotland, local councils	£20k - £50k for materials and digital campaigns	Education and Awareness Grants, Tourism Promotion Funds	Section 17.2.2
Develop carbon offset and visitor contribution schemes for sustainability projects	Medium-term (1-3 years)	Medium	Cruise operators, tourism boards, environmental NGOs	£100k - £200k for program setup and administration	Carbon Offset Programs, Sustainability Philanthropy, Green Investment Funds	Section 17.2.2

Action	Timeline	Priority	Key Stakeholders	Estimated Cost	Potential Funding Sources	Report Reference
Improve monitoring and data collection on cruise tourism's environmental impact	Medium-term (1-3 years)	Medium	Universities, research institutions, Forth Ports, Scottish Government	£100k - £200k for technology and research costs	Academic Research Grants, Environmental Monitoring Funds, Government Research Programs	Section 17.2.2