

The logo for BTS, consisting of the letters 'BTS' in a bold, blue, sans-serif font.The logo for jump research, featuring the word 'jump' in a stylized, orange, lowercase font with a small circle above the 'j', and the word 'research' in a smaller, orange, lowercase font below it.The logo for glic, consisting of the letters 'glic' in a bold, dark green, lowercase font.

ESES Region Cruise Ship Survey

Research Findings
November 2024

Background & Methodology

Background & Objectives

- BTS were commissioned to develop a sustainable cruise management strategy for Edinburgh and South East Scotland
- As part of this, primary research was needed to gain robust up-to-date data to feed in to economic impact calculations, and to gain insights on the visitor experience
- Face-to-face surveys were carried out as follows:

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 research objectives were to establish:
 - How much visitors have spent in the ESES region
 - What they spent on (type of good/service)
 - Where they spent it (local business vs multi-national)
 - How they travelled around the region
 - What activities they undertook
 - Overall experience ratings
 - Suggestions for improvement for the cruise passenger experience.
- Jump Research was commissioned to undertake a survey of passengers and crew.

Methodology



Face-to-face survey, administered by trained interviewers using iPads



Sample of passengers & crew re-embarking cruise ships



Questionnaire length approx. 8 mins



QR code offered to allow later completion



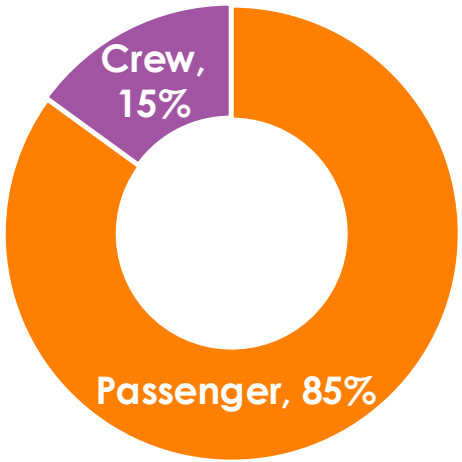
Final sample (n=777) has max. error of $\pm 3.5\%$ at 95% confidence level



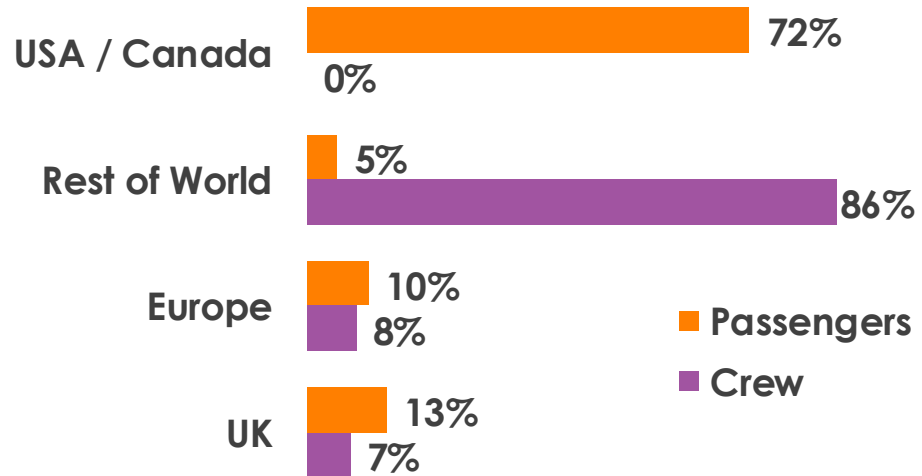
All research undertaken in accordance with MRS Code of Conduct and UK GDPR

Passenger and crew profiles were quite different – crew tended to be younger and from the rest of the world (often Philippines, Thailand, Indonesia) whereas cruise passengers tended to be older, and mostly from USA / Canada, travelling in couples or groups of adults.

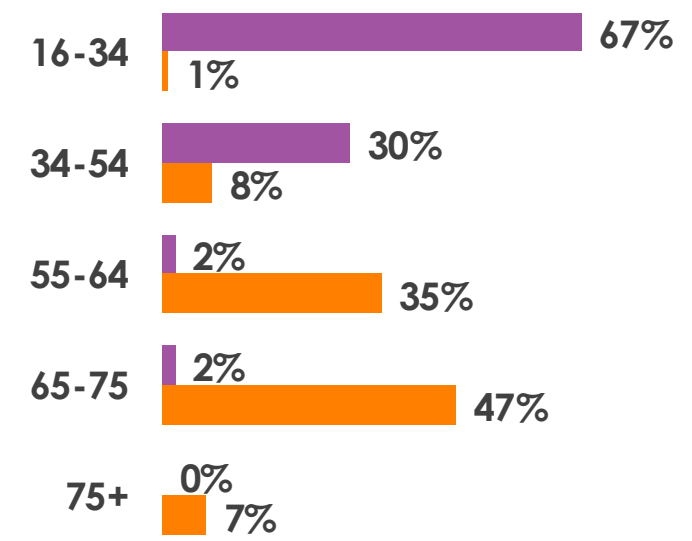
Visitor Type



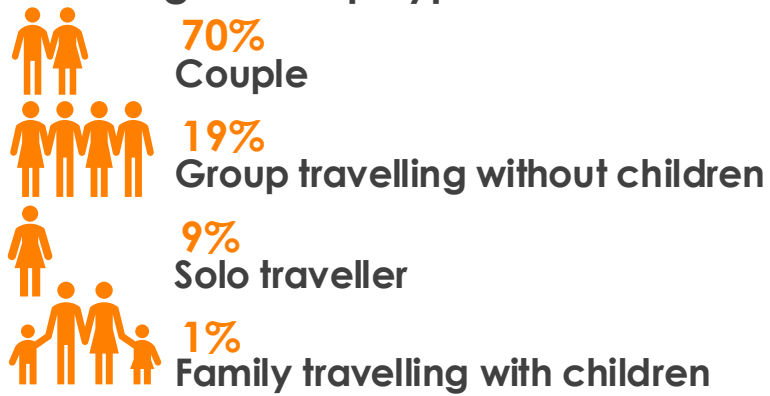
Country of Origin



Age



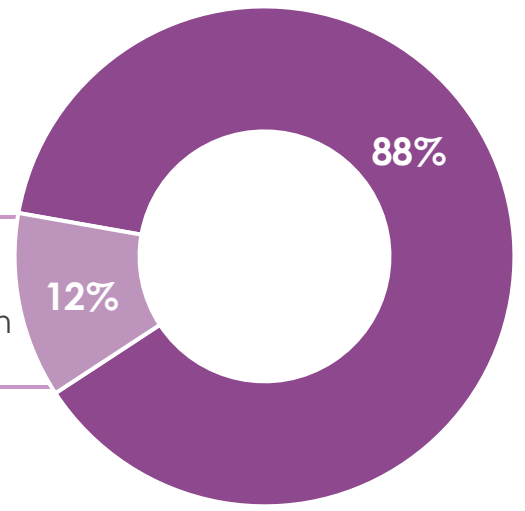
Passenger Group Type



Q Which of the following best describes your situation today? Base: (All) 777
 Q Which of the following best describes your immediate travel party? Base: (Passengers): 657
 Q Where do you live? Base: (Passengers) 657, (Crew) 120 / Q Which of the following age groups are you in? Base: (Passengers) 657, (Crew) 120

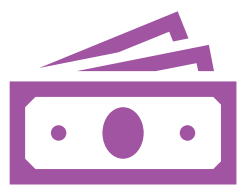
88% of crew interviewed had visited the local town / city and 81% spent money on shore. Spending was mostly on food and drink and shopping from local businesses.

Shore Activity



- Working on tenders
- Tour despatch
- Using WiFi

■ Visited town / city
■ Something else



81% of crew members who disembarked spent money on shore
Average spend per person (all crew) = **£31.15**

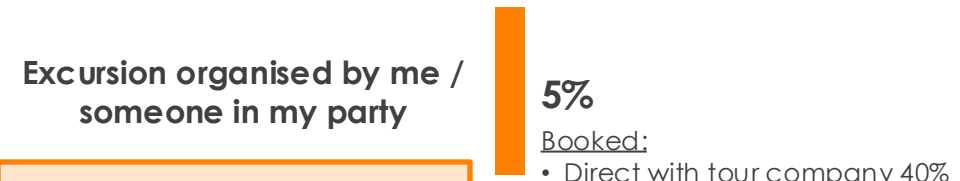
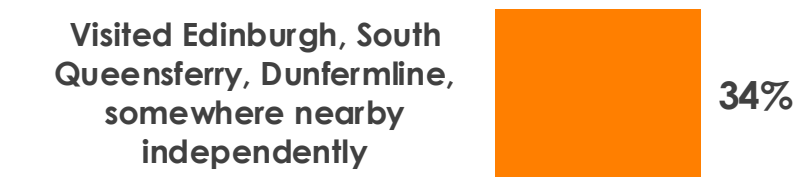
Spend Category



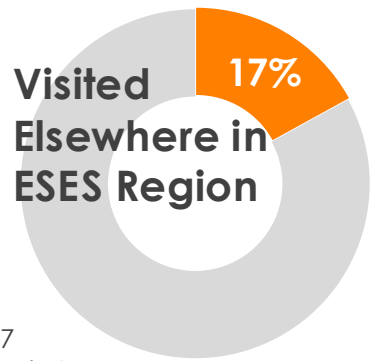
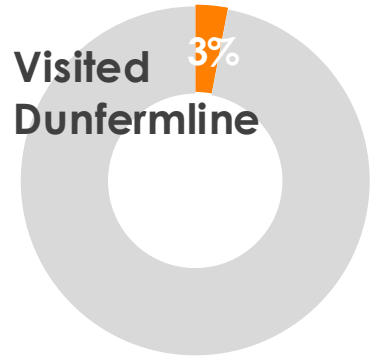
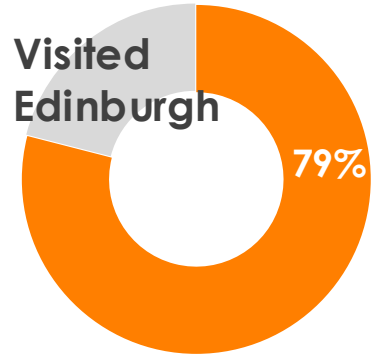
Q Which of the following best describes your activities today? Base: (Crew) 120
 Q In total, how much did you spend on shore today? Base: (Crew) 120
 Q Which of the following categories did you spend money on today? Base: (Crew who spent any money) 97

More than 6 in 10 passengers went on excursions organised by the cruise ship. The vast majority visited Edinburgh, regardless of dock location. More than half took in cultural sights or did a city tour, with many also partaking in food and drink and shopping while on shore.

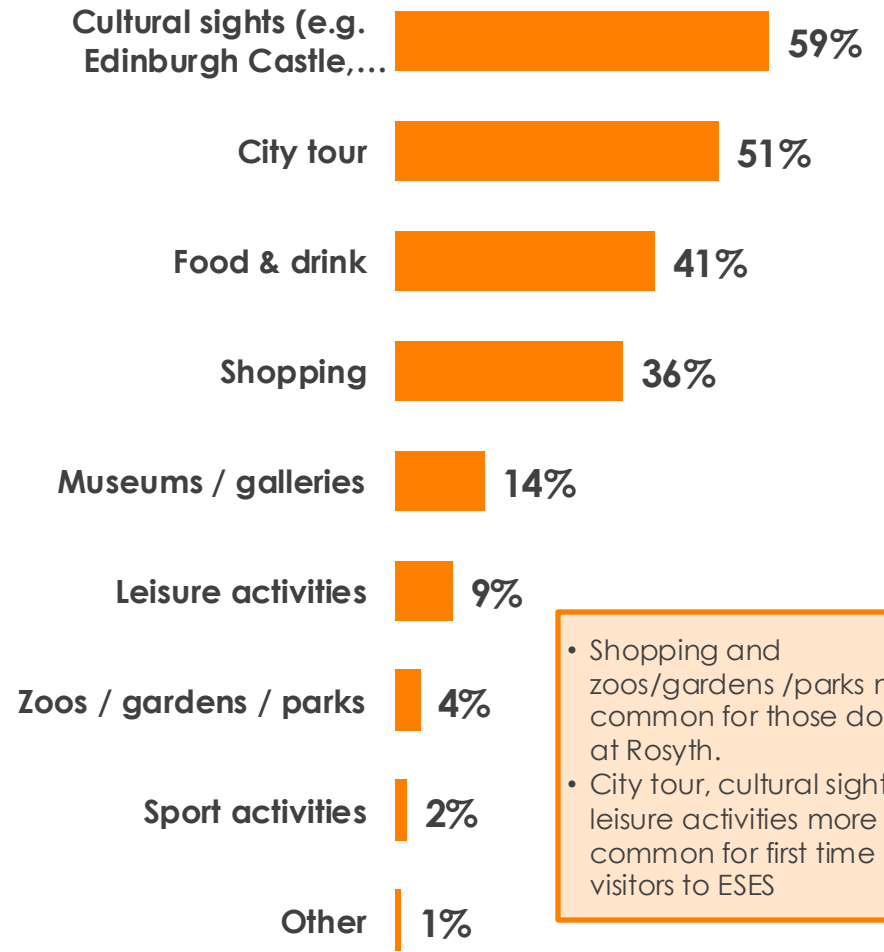
Activities



First time visitors to ESES and those docking at Newhaven were most likely to go on excursions organised by the ship.



Activities Undertaken

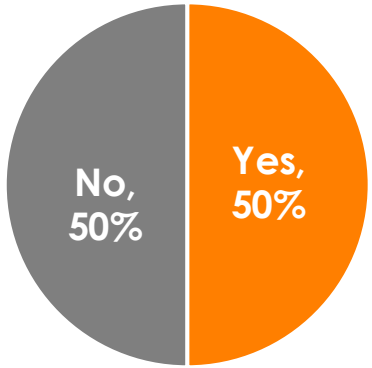


• Shopping and zoos/gardens/parks more common for those docking at Rosyth.
 • City tour, cultural sights & leisure activities more common for first time visitors to ESES

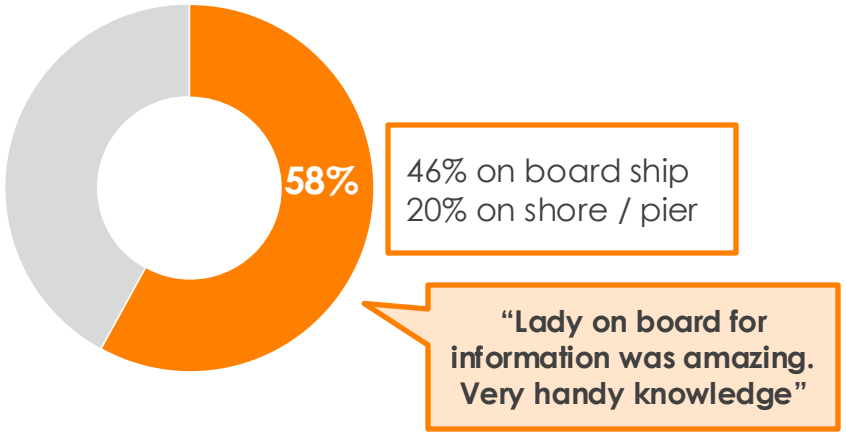
Q Which of the following best describes your activities today? Base (Passengers): 657
 Q How did you book your tour? Base (Passengers who organised excursion themselves): 35
 Q Did you visit Edinburgh, Dunfermline or somewhere else in the ESES area as part of your excursion today? Base (Passengers who went on excursions) 450
 Q Which, if any, of the following activities did you undertake today? Base (Passengers): 657

Half of passengers had visited the Edinburgh and South East Scotland area previously. Many received information or assistance from the Cruise Forth volunteers – often on board the ship. While two fifths did not do any research / planning, those who did tended to do so online using search engines, VisitScotland website or traveller review sites.

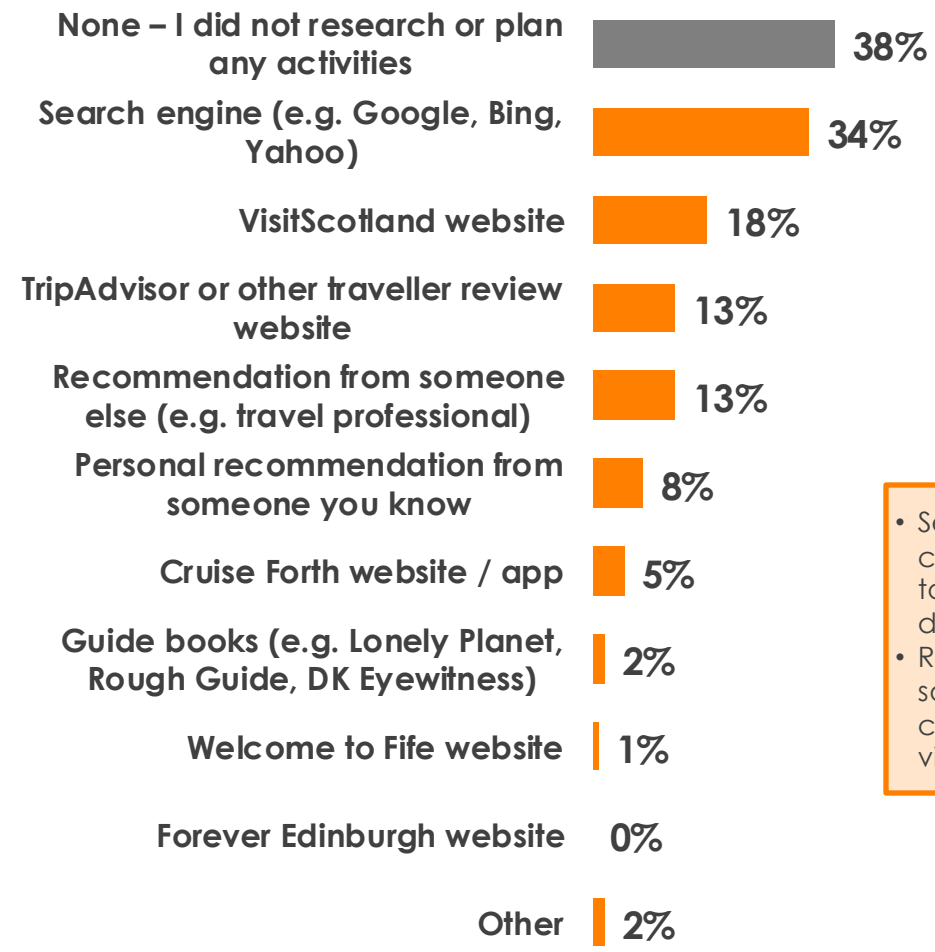
Visited ESES Previously



Received Info / Assistance from Cruise Forth



Sources Used in Planning

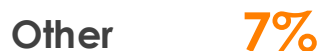


- Search engine more common for repeat visitors to ESES and passengers docking at Leith
- Recommendation from someone else more common for first time visitors

Q Have you visited the Edinburgh & South East Scotland area before? Base (Passengers): 657
 Q Which, if any, of the following sources did you use to research or plan your activities? Base (Passengers): 657
 Q Did you get any assistance/ information or maps from the Cruise Forth welcome volunteers (in purple jackets)? Base (Passengers): 657

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. Half felt it was very easy to travel around the ESES area – however this was one of the areas most likely to be identified for improvement.

Transport Modes Used



Ease of Travel Around ESES



“So good today. Easy transport to use. On to tram.”

“Used local bus which was cheaper and more stops”

“More available taxis”

“More shuttle buses also to other cities”

“Less roadworks”

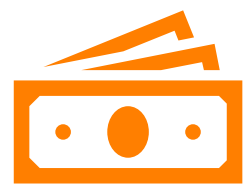
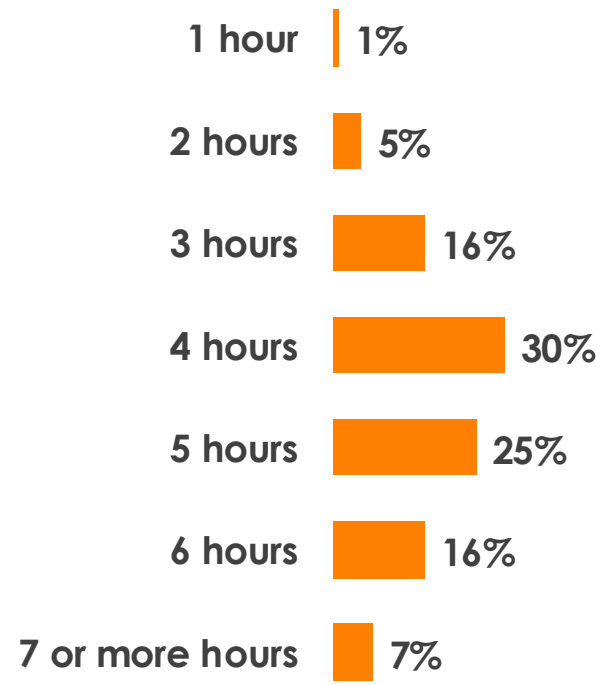
“Better information on use of tram and public buses”

“Instructions on how to pay for the tram. We got on after the Royal Yacht Britannia. The only option was to tap and it would not accept our card. We thought we could pay on the tram but instead the inspector fined us £10 each, not a great experience for a tourist. He was very cold and unhelpful and it really tainted our day.”

Q Which modes of transport did you use on shore today? Base (Passengers): 657
 Q How easy or difficult was it to travel around Edinburgh & South East Scotland? Base (Passengers): 657

Passengers spent an average of 4.5 hours on shore and spent an average of over £30 per person. Most spent on food and drink from local cafes / restaurants and 6 in 10 spent in local shops.

Length of Time on Shore



Average on shore spend per passenger = **£33.15**



Food and drink from local cafes / restaurants



81%



Food and drink from multi-national chain cafes / restaurants



8%



Shopping in local shops



59%



Shopping in multi-national high street shops



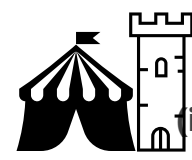
14%



Travel



24%



Leisure / entertainment (incl. attractions / events)



21%

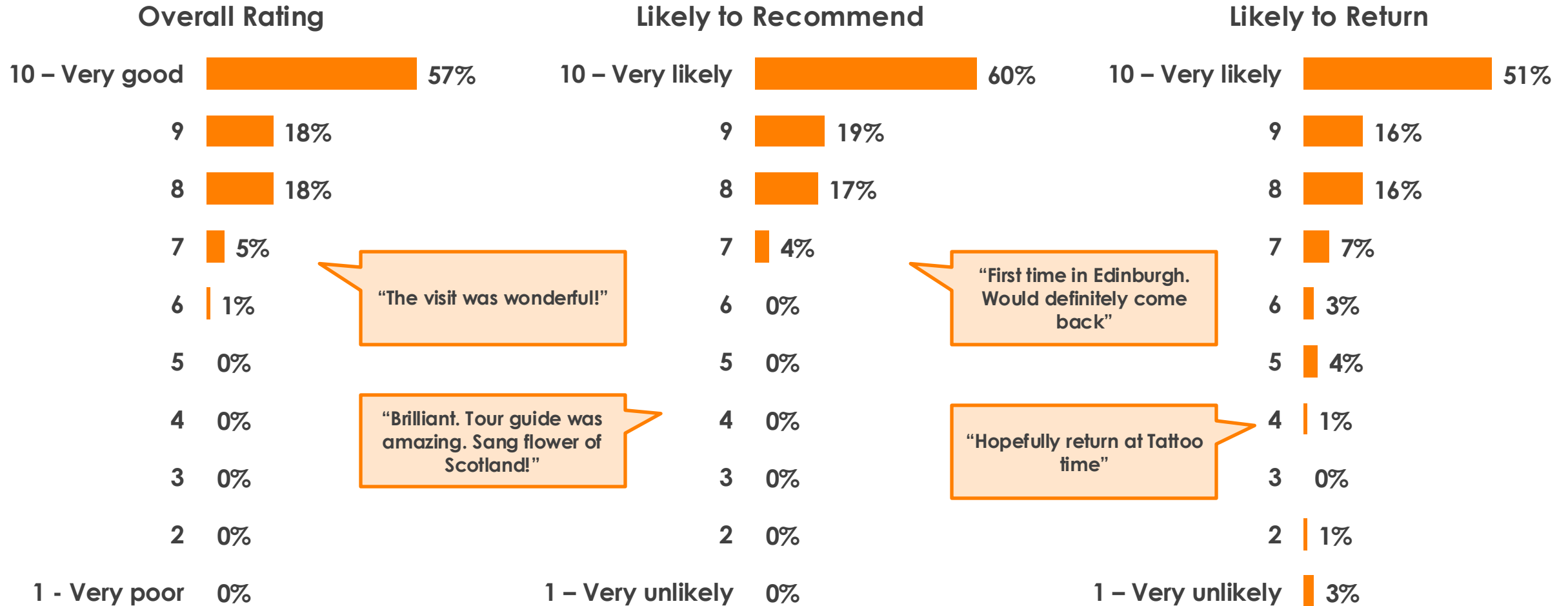
- Those docking at South Queensferry and Newhaven more likely to have spent on travel
- First time visitors to ESES more likely to spend on local shops and leisure/entertainment

Q How long did you spend on shore today? Base: (Passengers): 657

Q In total, how much did you spend on shore today? Base: (Passengers): 657

Q Which of the following categories did you spend money on today? Base: (Passengers who spent any money): 539

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 ESES area to others and half were very likely to return themselves.



Q Overall, how would you rate your visit in Edinburgh & South East Scotland today? Base (Passengers): 657

Q As a result of your experience today, how likely are you to recommend Edinburgh & South East Scotland to others as a place to visit? Base (Passengers): 657

Q And, how likely are you to return and visit Edinburgh & South East Scotland again in the future? Base (Passengers): 657

Most visitors either said nothing could have improved their experience, or made a positive comment. 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.

49%

Said nothing could have improved their visit to the area

20%

Made a general positive comment about their visit

Suggestions for improvements were:

More time in region / on shore	8%
Improved transport options	7%
Weather	6%
Dislike tenders / too much time waiting for tenders	3%
More / better facilities at terminal	3%
Better tour / tour guide	2%
Better / more information / maps	2%
Other	6%

"Tour guide never said anything full trip back very disappointed would have liked more info about the country and area"

"I cancelled my 2nd tour for fear of not returning on time. Longer stay or less time for tender transport would have made it better."

"Needs better docks for big ships shoreline needs cleaned up and improve structure"

"Better disabled access"

"A souvenir shop at the terminal is advised, since many excursions end at the terminal and leisure time is limited."

"An overnight (2 day) stay would have been awesome. We could have seen a lot more if the city and surrounding area."

"Weather not great but trip was good"

"Less crowds"

"Wifi at the port wasn't working"



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