

# Maritime transport (passengers, ferries and cruise ships)



## Key message

Ferry passenger numbers increased by 6% to 10.3 million and vehicles increased by 12% to 3.5 million between 2014 and 2018. From 2013 to 2017, the GVA from passenger water transport decreased by 8% to £90 million, but the year to year fluctuations are much larger than this.



MV Clansman arriving Loch Maddy © Martyn Cox.

## What, why and where?

Ferries are an essential part of Scotland's transport network (Figure 1) whose services cover both island and mainland communities. This section covers the movement of people (passengers, cars and commercial vehicles) on ferries and cruise ships and the associated infrastructure.

Ferry passenger numbers increased by 6% from 9.7 to 10.3 million between 2014 and 2018. The number of vehicles that ferries carried, which includes cars, commercial vehicles and busses, increased by 12% from 3.0 to 3.5 million in the same period.

The number of cruise ships calling into Scottish ports has risen from 446 in 2012 to 825 in 2018.

Transport Scotland is responsible for legislation, policy and guidance relating to Scotland's ferries, looking after services, ports, harbours and canals across the country. They are also responsible for some of the lifeline ferries and ports, including ferry networks connecting the islands and mainland communities. A lifeline ferry is a ferry that is required in order for a community to be viable.

## Contribution to the economy

According to Scotland's Marine Economic Statistics (Scottish Government, 2019) marine transport sectors contributed the following

Gross Value Added (GVA) and employment to the Scottish economy.

In 2017, passenger water transport generated £90 million in GVA and employment for 1,100 people (headcount). From 2013 to 2017, the GVA from passenger water transport (adjusted to 2017 prices) decreased by 8% to £90 million. The longer term trend, from 2008 to 2017, showed passenger water transport GVA fluctuating from year to year, with a low of 51 million in 2011, a high of 131 million in 2014 and the 2017 value 8% lower than the 2008 value.

Employment in 2017 fell to 1,100, its lowest in the series, from a high of 1,800 in 2014. From 2008 to 2017, employment fell by 27%.

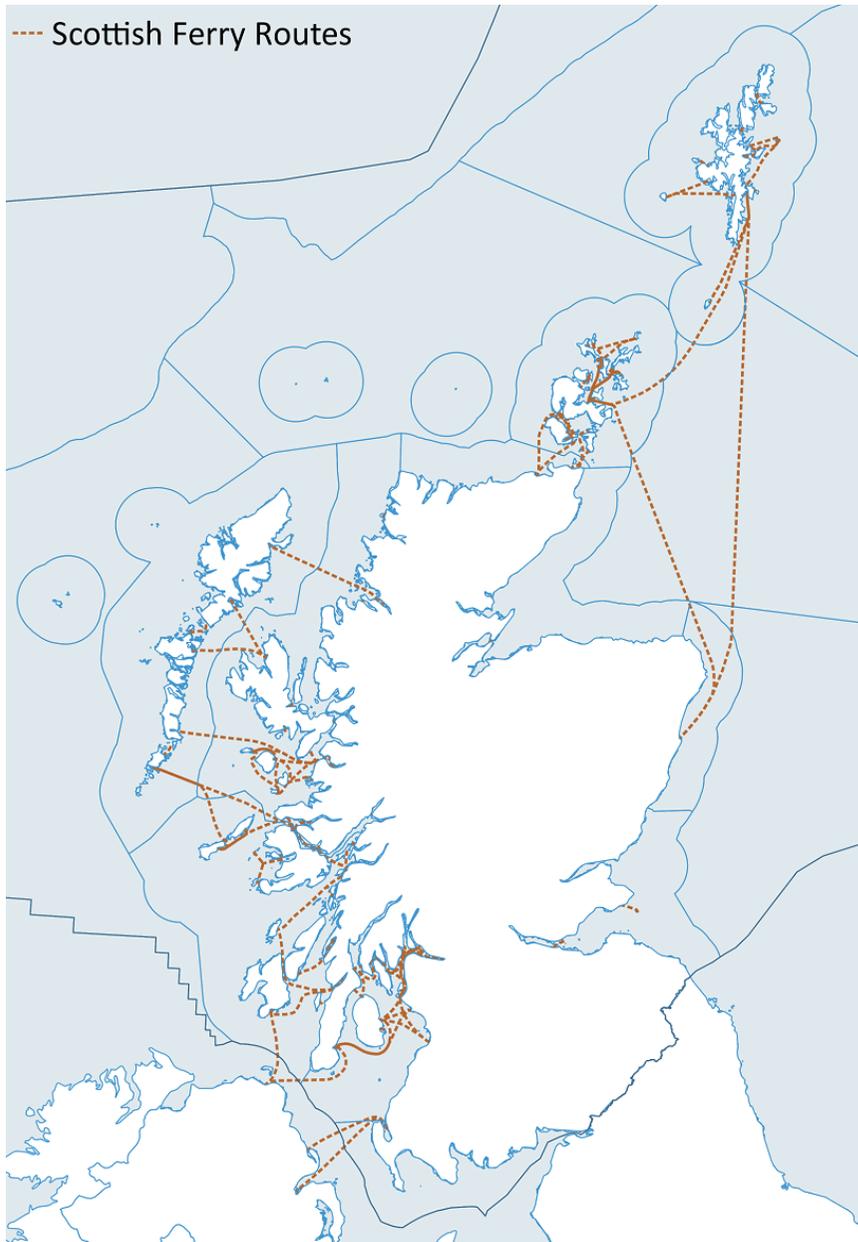


Figure 1:  
Ferry routes with Scottish Marine Regions and Offshore Marine Regions.  
Source: Transport Scotland. Now excludes Rosyth to Zeebrugge ferry route as Transport Scotland reports this closed in April 2018.

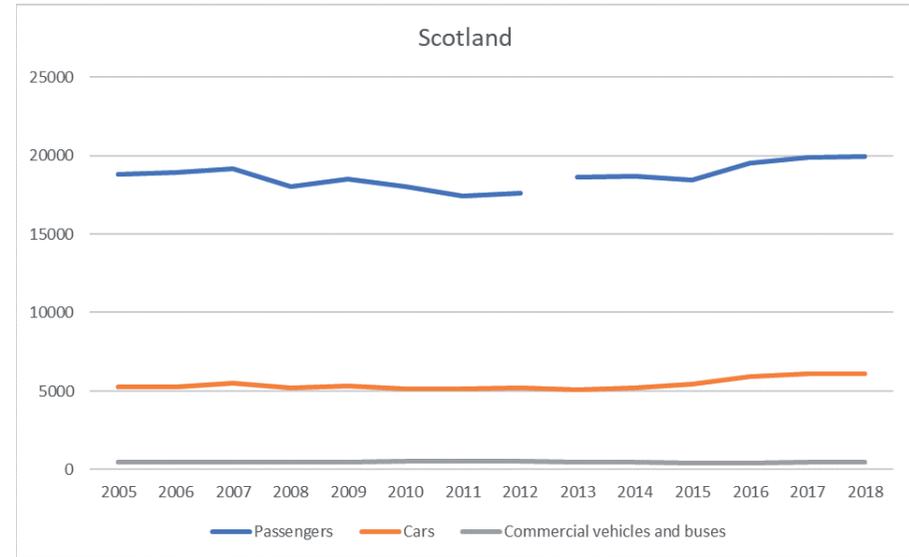


Figure 2:  
All Scotland ferry journeys 2009 - 2018. Y axis = '000s. Source: Scottish Transport Statistics, Scottish Government (2020). Note: Passenger numbers from Corran Ferry route are excluded as these numbers are estimated.

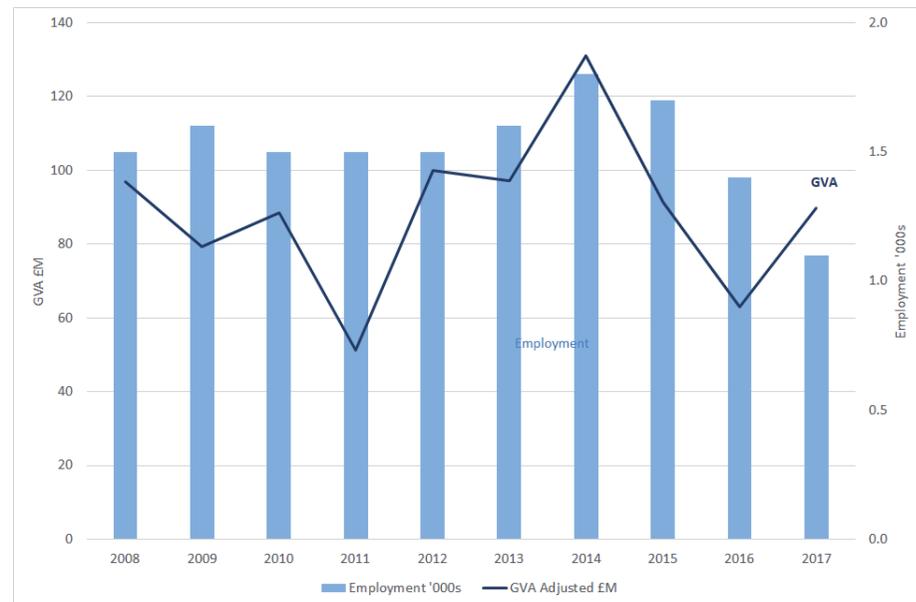


Figure 3:  
Passenger transport - GVA and employment, Scotland, 2008 to 2017 (2017 prices).  
Source: Scotland's Marine Economic Statistics (Scottish Government, 2019).

The source data underpinning the estimate of the economic contribution of Sea and coastal passenger water transport includes:

- transport of passengers overseas and coastal waters, whether scheduled or not;
- operation of excursion, cruise or sightseeing boats;
- operation of ferries, water taxis etc.; and
- renting of pleasure boats with crew for sea and coastal water transport (e.g. for fishing cruises).

## Examples of socio-economic effects

- Sea transport remains environmentally efficient.
- Sector is a significant economic contributor providing added value, employment, skills and training.
- Ferries enable the movement of people, goods and services to and from island and remote communities improving their connectivity.
- Many ports are close to expanding residential areas which can limit their development.

## Pressures on the environment

An OSPAR agreed list of marine pressures is used to help assessments of human activities in the marine environment. The [marine pressure list](#) has been adapted for use in Scotland via work on the [Feature Activity Sensitivity Tool](#)

([FeAST](#)). Maritime transport (passengers, ferries & cruise ships) activities can be associated with 27 marine pressures – please read the pressure descriptions and benchmarks for further detail.

## Forward look

The 'Vessel Replacement and Deployment Plan 2016' (VRDP) (Transport Scotland, 2018) outlines the future make-up of the ferry fleet serving the Clyde and Hebrides ferry service network. The overview includes how existing, planned and prospective vessels could be deployed across the Clyde and Hebrides ferry service network to deliver the Government's Ferries Plan commitments and better meet forecast demand. The VRDP informs new vessel and harbour investments.

Ports are identifying the need for new development to support the growing number of cruise ships visiting Scotland. For example,



Figure 4:  
Proposed multifunctional deep water berth at Stornoway. © Stornoway Port Authority.

Stornoway is in the process of developing a new multifunctional deep water berth which will accommodate the largest cruise vessels as well as general cargo, renewables industry, oil and gas and ferry infrastructure. It is scheduled to open in 2021.

At Greenock there is new pontoon under construction to accommodate cruise vessels, due to be open for the 2020 cruise season. An application is being made for a new cruise terminal with completion planned for the 2021 season.

Scrabster Harbour is currently developing plans for a new £18 million 250 m cruise berth for completion in 2021.

Inverness plans expansion of the port infrastructure that could accommodate specific requirements for cruise ships.

Lerwick Port Authority has plans for dredging at North Ness channel and Mair's Pier to accommodate cruise ships over 240 metres as well as a long range capital project (in planning) for a town centre deep water berth, capable of accommodating large cruise ships.

## Economic trend assessment

Trends for Scotland are based on ferry passenger numbers within Scotland and between Scotland and Northern Ireland or other EU countries (2014-2018). They do not include double counting.

Trends for Scottish Marine Regions are based on ferry passenger numbers (2014-2018). They include double counting as all journeys within an SMR are included even where a route starts in one SMR and finishes in another.

Confidence is 2 stars \*\* (medium). Based on published statistics supplied by ferry companies with some quality issues.

Scottish Marine Region	Trend with confidence
Argyll	
Clyde	
Forth and Tay	
Moray Firth	
North Coast	
North East	
Orkney Islands	
Shetland Isles	
Solway	
West Highlands	
<b>Scotland</b>	