



# Market Report

A Snapshot of your Marketing Sector

## Marine Tourism

This pack has been designed to provide information on setting up a business in the **Marine Tourism** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website ([www.bgateway.com/businessplan](http://www.bgateway.com/businessplan)), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **December 2024**.

## What do I need to know about the Marine Tourism market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ The industry in United Kingdom is forecast to generate revenue of **£5.6bn in 2024**, down -6.6% on the year. This equals a 19.7% to total European revenue of £28.5bn, representing the 2nd largest share. By £5.3bn, United Kingdom outperforms the European median revenue of £263.3m. According to Eurostat, the number of **seaborne passengers embarked and disembarked in EU ports dropped by 45% in 2020**, driving a sharp decline in passenger water transport revenue. Ongoing restrictions on capacity meant that passenger numbers were restricted to a 16.4% rise in 2021. (IBIS World, *Sea & Coastal Passenger Water Transport in the UK*, December 2024).
- ◆ 2024 is expected to be a record year for the UK cruise market, with wage growth and increased consumer confidence having a positive impact on holiday bookings. Demand for cruises is also driven by strong interest in multi-centre holidays and new experiences, capacity growth, modernisation of ships, strong advertising spend and the increasing ease of booking a cruise online. However, as the sector grows, concerns about the segment's contribution to over-tourism are likely to grow as well. Cruise lines need to closely collaborate with destinations to build support and increase focus on destinations that have the infrastructure and space to handle passenger numbers. Meanwhile, destinations coping with over-tourism should be visited during quieter times or with smaller ships, while guests should be inspired or given more time to explore beyond the main landmarks. (Mintel, *Cruises – UK – 2024*)
- ◆ 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. Thus, largely, Europeans sail Europe!. (CLIA, [European Market Report 2023](#))
- ◆ The national organisation for this industry is [British Marine](#). Other industry bodies include [Cruise Scotland](#), [The Boating Association](#), [CLIA \(Cruising\)](#) the [Scottish Tourism Alliance](#) and [Visit Scotland](#).



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## Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email [info@bgateway.com](mailto:info@bgateway.com).

- ◆ **Technavio – Cruise Tourism Market (2024-2028).** UK will generate growth in all the years of the forecast period between 2023 and 2028. The year- on-year growth during this period will vary between 9.34% and 12.13%. UK was the 3rd-largest country in the market in 2023 and will continue to be the 4th-largest segment in 2028. It will grow at a compounded annual growth rate of 10.59% between 2023 and 2028, which is lower than that of the overall market. Among the key countries, UK will be the slowest growing country and will grow from **\$1,766.7 million in 2023 to \$2,922.08 million in 2028**. It will contribute 4.64% to the incremental growth of the overall market between 2023 and 2028. UK contributed 5.45% to the global cruise tourism market in 2023, and its contribution will decline to 5.1% in 2028.
- ◆ **Statista – Cruise industry in the United Kingdom.** This report presents a range of statistics and facts on the cruise industry in the United Kingdom. It provides key data on passenger numbers, destinations, and ports, as well as figures on cruise companies and passenger behaviour.

There are also a number of online resources you may find helpful:

- ◆ **Cruise Lines International Association** - The cruise industry is a 'made in Europe' supply chain which generated 55.3 billion euros and 400,000 jobs in Europe in 2023. In the next 12 years, with an investment of 57 billion euros, 72 of the 76 ocean cruise ships will be built in European shipyards (97%) of which 40 in Italy (52.6%), 12 in Germany (15.8%) and 10 in France (13.2%). ([Made in Europe](#)).
- ◆ According to **Visit Scotland**, cruise tourism to Scotland has been strongly concentrated in the Highlands and Islands. During 2019, the Highlands and Islands had almost three in four (73%) of Scotland's total cruise calls, and welcomed 61% of cruise passengers, largely at Kirkwall, Lerwick and Invergordon ([Cruise Tourism in Scotland](#)).
- ◆ **Giant Strides 2020-2025** is a the strategy to boost Scotland's marine tourism, launched in Spring 2020. This represents the next evolution of the successful '**Awakening the Giant**' strategy. Giant Strides takes a broader view of marine tourism, it's role within coastal and island communities and the benefits marine tourism can deliver for communities, the environment and the Scottish economy. The five-year plan aims to grow the industry's economic contribution to over £500 million by 2025. ([Giant Strides 2020-2025](#))

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## How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**



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## What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please [info@bgateway.com](mailto:info@bgateway.com) or by calling **0300 013 4753**.

## Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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## How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

### Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) ["Find a Chartered Accountant"](#) tool

### Funding

[Practical information](#) on finance and funding for starting and growing your business

### Insurance

[Business insurance guide](#)

### Legal Help

Gov.uk ["Licence Finder"](#) tool

Law Society of Scotland's ["Find a Solicitor"](#) tool

### Pricing

Business Companion [Pricing & payment guide](#).

**Please note:** the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

### Promotion

[BG guides to Marketing](#)

### Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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