

A woman with a ponytail, wearing a green t-shirt and dark trousers, stands on a sandy beach. She is holding a camera up to her eye, taking a photograph of a tall, white lighthouse in the background. The lighthouse has a yellow band near the top and a glass-enclosed lantern room. The scene is framed by tall, golden-brown beach grasses in the foreground. The sky is a pale, clear blue. A semi-transparent dark grey horizontal band is positioned behind the text.

Cruise Ready Toolkit

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Cruise Ready Toolkit

The majority of the world's cruising fleet (up to 300m in length) can call in at world-class facilities at Aberdeen South Harbour. This provides a fantastic opportunity for the region to capitalise on this high spend, growth market. To make the most of the market opportunity, it is important to work in partnership to provide high-quality onshore visitor experiences that make Aberdeen and Aberdeenshire stand out as a **'must see, must visit'** destination. Importantly, we need to combine this with world-class customer service once visitors arrive in port.

This guide is designed to help your business understand the scope of the cruise market for the area, the opportunities available, the routes to market, and the importance of providing the best possible experience to cruise passengers once they are ashore.

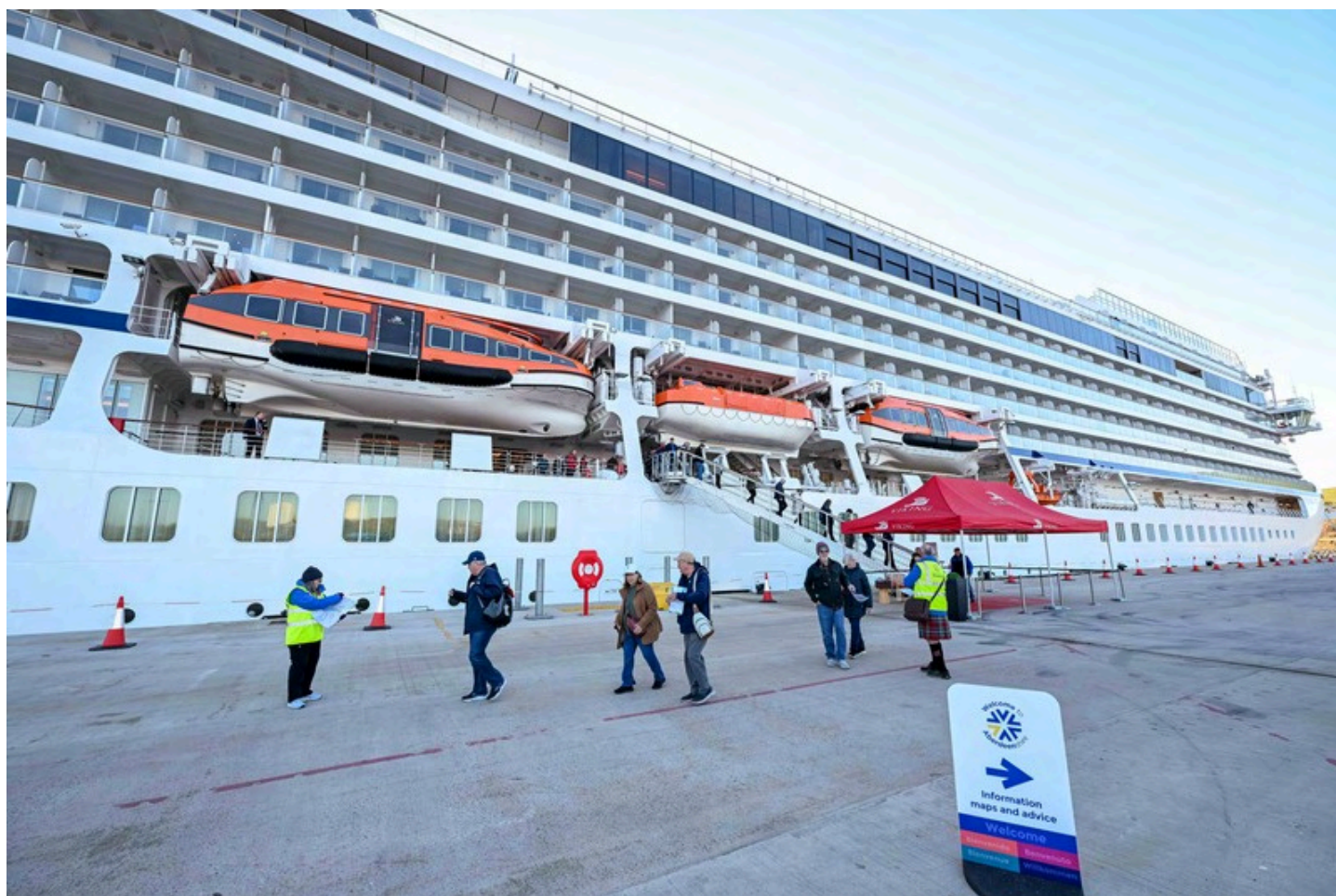
The Cruise Market in Scotland

Scotland attracts cruise ships and passengers from around the world and is high on the list of '*must see, must experience*' destinations.

It is estimated that **£40.6 million** was spent directly onshore by cruise passengers and crew in Scotland in 2019, representing 0.4% of all (overnight and day) tourism spend in Scotland.

In 2019, there were almost **900** cruise ship calls and over **800,000 cruise** passengers visiting Scotland. This was an 8% increase in calls from 2018 and a 17% increase from 2017.

Source: Cruise Tourism in Scotland: Review and Sustainable Development Opportunities, Ekosgen, 2020.



Types of Cruise Ships

Cruise ships tend to fall into three main categories, irrespective of their size. Their client profile, will vary considerably, reflecting their target market, e.g. families, multi-generation family groups, seniors, luxury, golf.



Ultra-Luxury Cruise Ships

Top of the range vessels for discerning travellers who want and expect the very best in service, food and staterooms. From all-suite ships to champagne on tap and butler service, the on-board experience offers the ultimate in style and sophistication. The onshore experience is usually as tailored and luxurious as the onboard experience. Some ultra luxury cruises may have shore excursions or experiences included in the price.

Examples include: Silversea Cruises, Oceania, Cunard and Hebridean Princess.

Luxury Cruise Ships

Luxury cruise ships are often family oriented, particularly during the school holidays in their source markets. They offer outstanding service with itineraries covering some of the world's best known and sought-after destinations.

Examples include: Carnival Group, P&O, Holland America, Fred. Olsen, Cunard and Royal Caribbean.



Expedition and Adventure Ships

In contrast with others, adventure or expedition cruises are very much about the destination, not necessarily the ship itself. The ships are generally smaller than other types and tend to carry passengers with more specialist interests. Many go to inhospitable climes and may involve land-based activities which can be strenuous.

Operators include: Voyages of Discovery, Noble Caledonia and Swan Hellenic

Why do People Take Cruises?

The global cruise industry is booming, with experts predicting strong and sustained future market growth. Cruise comparison website 'Cruise Critic' lists ten key reasons why cruising is the number one choice for many of today's holidaymakers:



A new generation of cruise passengers

The average age of cruise passengers is now:

46.5 years

50%

of current and potential travellers are more likely to make travel decisions based on environmental impacts.

Responding to this rapidly changing market, cruise line companies have adapted their offers to meet the needs and expectations of today's increasingly sophisticated passengers.



The Key Trends



- Cruise ships as the destination with a range of on-board amenities and experiences expands.
- More online connectivity onboard ships.
- Luxury travel on cruise ships.



- Volunteering opportunities for cruise passengers.
- Overnight stays at ports of call.
- Multi-generational cruising.
- Solo cruise passengers.



- Cruise lines are following a path to decarbonisation with advancements in technology, infrastructure and operations. They are also increasingly offering environmental education and sustainable tour experiences for passengers.

Did you know?

85%

of travellers who have cruised will cruise again - a **6%** increase from pre-pandemic levels.

63%

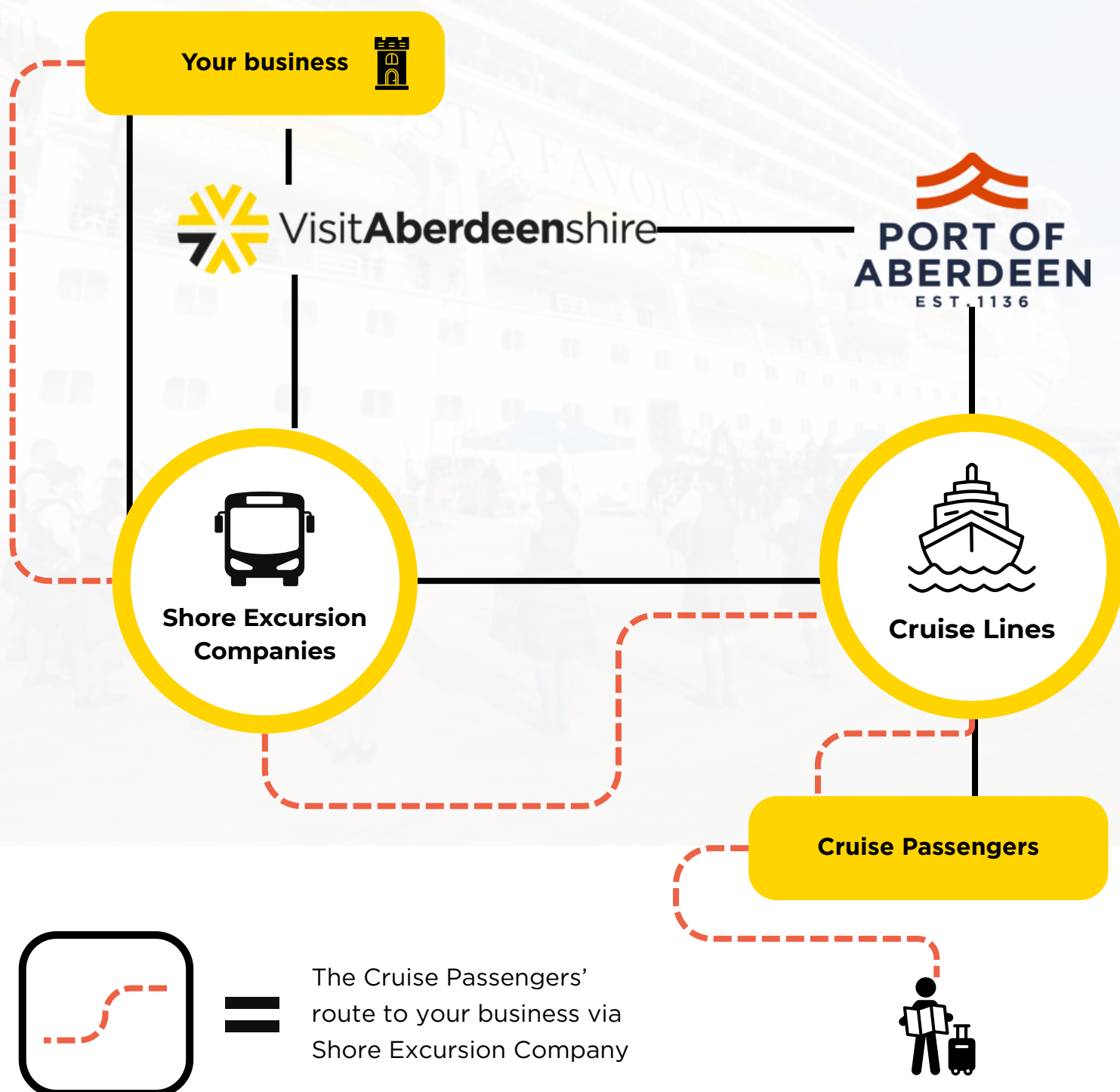
of people who have taken a cruise say that they have returned to a destination that they first visited via cruise ship.

Source: Cruise Line International Association 'Cruise Industry Outlook' and 'State of the Cruise Industry Report 2023'

The Key Players

There are many different organisations and people involved in the cruise sector. The following infographic and descriptions describe who does what throughout the distribution chain.

Cruise Market Distribution Channels





Cruise Lines

The cruise journey starts at home, with consumers researching itineraries and prices via web portals or agencies including cruise line company websites, travel agencies (traditional or online), and cruise consolidators who compare cruise options via a central web portal. Once consumers have booked a cruise with a cruise line, they can purchase from a range of shore excursion options at each port on the cruise itinerary. These generally go on sale a few weeks before departure and can also be booked on board. The shore excursion options are often finalized up to 2 - 3 years before departure.

Port of Aberdeen

Port of Aberdeen is responsible for promoting the port to cruise lines, sometimes in conjunction with VisitAberdeenshire. They contract with cruise lines, via shipping agents, to schedule cruise ship calls and control and manage all activities in port. They are also responsible for safely handling ship arrival and departures.

Shore Excursion Companies (Cruise Line Appointed)

Shore excursion companies bid competitively to handle all excursions for cruise line programmes. If successful, they act like ground handlers, putting together a range of excursion options for each port of call on the cruise itinerary. The excursion options developed are based on the specification from the cruise line which reflects their cruise passenger profile and interests. The appointed shore excursion company is also responsible for delivery of the excursions including contracting with coach companies, guides and local attractions and experiences. They also co-ordinate logistics on the quayside when the ship is in port.

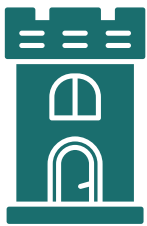
Shore Excursion Companies (Independent)

Some shore excursion companies compete directly with the shore excursion programme offered by the cruise line. They track the cruise itinerary and offer excursions at each port of call which are bookable in advance, often at a slightly lower cost. Unlike the appointed shore excursion company which can bring coaches on to quayside, independent competitor shore excursion companies have to arrange a meeting point out with the port perimeter.



Local Tour Companies

Some cruise passengers may want to explore the destination themselves and book a tour with a local tour company offering private tours or fixed departure tours. They are likely to explore options like any other visitor, browsing VisitAberdeenshire's website and/or their preferred online booking platform, for example Viator or Get Your Guide. They may be looking for a bookable tour with a set route and departure time or they may be looking for a local tour company capable of providing a private and tailored tour or walkabout for a small group.



Local Businesses

A range of local businesses play a vital role in providing excellent customer service and memorable onshore visitor experiences. This includes visitor attractions and experiences, activity providers, coach companies, guides, retailers, cafes, bars and restaurants.

Shipping Agents

Shipping agents are licensed agents in a port who transact a ship's business, such as insurance or documentation, on behalf of the owners. They also arrange provisions and fuel.

Cruise Aberdeenshire

Cruise Aberdeenshire is a group formed to work together to ensure that the destination is 'cruise ready'.

Chaired by VisitAberdeenshire, membership comprises key partners including the Port of Aberdeen, Aberdeen City Council, Aberdeenshire Council, VisitScotland and Aberdeen Inspired.



The Role of the Welcome to Aberdeenshire Volunteers

The Welcome to Aberdeenshire volunteer service is designed to enhance the visitor experience through provision of a warm, well informed, welcome to the destination, primarily at point of arrival. To date the volunteers have supported the arrival of cruise ships with large numbers of passengers into both the North and South harbours.

The volunteers are passionate locals who are keen to share their knowledge of the destination with cruise passengers. They:

- share information about getting around the region, and things to see and do
- hand out maps to help them get around both the city and 'shire
- signpost our website to highlight what's on offer across the destination

Each call is different, and as such the welcome is tailored to suit.



In 2025, our volunteers greeted **38** cruise ships between April and September - a **68% increase on 2024**

What Cruise Passengers are Looking For

Increasingly, cruise passengers are seeking unique experiences, authentic to the destination, which allow them to get 'under the skin' of the places they visit and take part in more active pursuits.

*Think about how you can create offers that will **'immerse'** cruise passengers in local culture, such as traditional music sessions or food and drink tastings. Or tap into the trend for more active onshore experiences by offering pursuits such as bike hire, guided walks or wildlife watching.*

It's worth bearing in mind too, that cruise lines offer the highest standards for their cruise passengers aboard ship and both they, and their passengers, expect their chosen destination to do the same.

Broadly, cruise passengers fall in to three categories:

Those who have pre-booked a shore excursion with the cruise line (or an independent cruise excursion company)

- This could be a half day or full day tour or activity.
 - If half day, they will also have time to explore the destination themselves, most likely Aberdeen city centre.
 - If full day, depending on how long their ship is in port, they are likely to have the option of being dropped off in the city centre at the end of the tour.
- Cruise line excursions are popular as the cruise line guarantees that the ship will wait for all excursions to return before sailing away or meet the cost of cruise passengers travelling to the next port of call, should there be any delay.

On average

60-70%

of cruise passengers are likely to book a cruise line excursion or experience.



Independent passengers who wish to explore the destination on their own (those who pre-plan their day, those who don't)



Independent passengers pre-plan their time ashore in advance are likely to travel further, those who don't pre-plan are less likely to venture far from the port.

Options include:

- Taking a shuttle bus to the city centre to explore on foot.
- Using public transport or a taxi to explore more of the city.
- In advance, booking a tour offered by a local tour operator or an activity or a guided walk.
- In advance, booking a private tour from a local tour operator or a private guided walk with a guide or an activity for a private group

Aberdeen is a relatively compact city to explore and both north and south harbours are close to the city centre so a slightly higher percentage of cruise passengers may opt to explore on their own.

Depending on how risk averse cruise passengers are, and bearing in mind that they are fully responsible for getting themselves back on board in time for sail away, it's unlikely that they will venture deep into the destination. If the next port of call on the cruise, for example, is Norway/Shetland/Iceland, it could be very costly and time consuming to get to those destinations to rejoin the ship if they fail to be back on board on time.

On average

30-40%

of cruise passengers are likely to explore the destination on their own.



Those who remain on board

Around **5 - 10%** of cruise passengers remain on board to make use of onboard services.

Getting Your Offer Into Sales Channels

Visitor Attractions/Experiences/Activities

Shore excursion companies

- You will need a trade bookable product with trade prices.
- If you already have a trade bookable product, make sure that Visit**Aberdeenshire** is aware so it can be promoted to shore excursion companies and other travel trade intermediaries.
- You can contact shore excursion companies direct yourself but bear in mind that they deal with multiple ports and may not be able to respond to every business.
- Remember that there can be a long lead in time between agreement to sell your offer and the first cruise visitors – two to three years is not unusual.

Cruise passengers making their own plans

Online visibility is key as cruise passengers are likely to research online and plan their time in port. The Visit**Aberdeenshire** website is mobile friendly and the Cruise Volunteers will also be highlighting it as a source of in destination information:

- Make sure that your own website is up to date, featuring what you offer on cruise days.
- Keep your listing on the Visit**Aberdeenshire** website is up to date. If you don't yet have a listing, click here to create an account and submit a listing.
- Cruise passengers may well turn to their favourite online booking platform to book in advance or on the day, so it's beneficial to be discoverable on one or more online travel agent (OTA).

If you need advice on developing bookable products or if you'd like to learn more about working with OTAs, contact Visit**Aberdeenshire** by emailing industry@visitabdn.com.

Getting Your Offer into Sales Channels

Hotels/Guest Houses/B&B/Accommodation Providers

If cruises are starting and/or terminating in Aberdeen, generally speaking, cruise lines don't make accommodation reservations for their cruise passengers. On that basis, cruise passengers are likely to use their preferred method to find accommodation, either direct, or with their preferred online booking platform.

Online visibility will be key:

- Make sure that your own website is up to date, featuring what you offer on cruise days.
- Make sure that your listing on the Visit**Aberdeenshire** website is up to date.
- Cruise passengers may well turn to their favourite online booking platform to book in advance, so it's important to be bookable with one or more online travel agent (OTA). If you want to learn more about how to work with them, contact VisitAberdeenshire by emailing industry@visitabdn.com.

Local Tour Operators/Walkabout Providers

Online visibility will be key to get in front of cruise passengers planning their time in port pre or on arrival.

Make sure that your own website is up to date, featuring what you offer on cruise days.

Make sure that your listing on the VisitAberdeenshire website is up to date. If you don't yet have a listing, [click here to create an account and submit a listing](#).

Cruise passengers may well turn to their favourite online booking platform to book in advance or on the day, so it's important to be bookable with one or more online travel agent (OTA). If you want to learn more about how to work with them, contact VisitAberdeenshire by emailing industry@visitabdn.com.

Getting your offer into sales channels

City centre food and drink outlets

Food and drink on board is copious and available from early morning until very late. It's also included in the cost of the cruise. As a result, it is unlikely that cruise passengers will be looking for a substantial meal when onshore.

You could catch interest by:

- Offering tasting plates, particularly featuring local or Scottish specialities.
- Using local produce, both food and drink, and highlighting this in your promotions.
- Keeping your website up to date with what you are offering on cruise days.
- Keeping your listing on the VisitAberdeenshire website up to date. If you don't yet have a listing, **[click here to create an account and submit a listing](#)**.

Retailers

The main shopping areas will be marked on maps which will be provided free of charge by the Cruise Volunteers.

Cruise passengers may also familiarise themselves online with the retail offering in advance of their cruise.

You could consider an incentivised offer to cruise passengers on production of their boarding card.

It may be worth displaying a welcome message for cruise passengers at the entry to your premises. You'll find the name of all ships calling on any date on the Port of Aberdeen website.

Whatever sales channel you decide to use, remember that your offer needs to be **easily accessible** in terms of time and distance from port, and **tailored** to a wide variety of cruise passengers and pockets.

Final thoughts

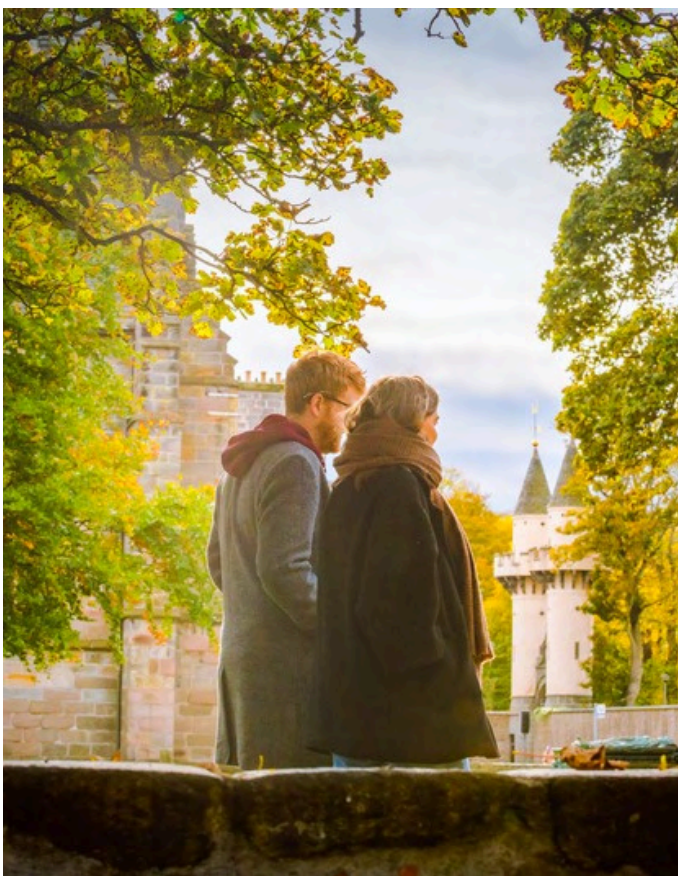
Don't Forget About the Crew

The ratio of crew to passengers is very high, usually in the region of 3:1 but it can be higher.

Around 30% of crew will go ashore for rest and recreation and to stock up. They tend to be more interested in supermarkets, food outlets and clothing shops.

Some, particularly front of house crew, may well want to get to know the destination as a visitor to be able to speak knowledgeably about it to their passengers.

If you're a retailer or catering outlet, you could consider offering a similar range of incentives to crew members as you do to cruise passengers.



Finally, the range of experiences available across the destination, from retailers, catering outlets, visitor attractions, activities and tours are the face of Aberdeen and Aberdeenshire.

What you and your team do, and how you receive cruise passengers will shape perceptions of us as a destination for ever more.

