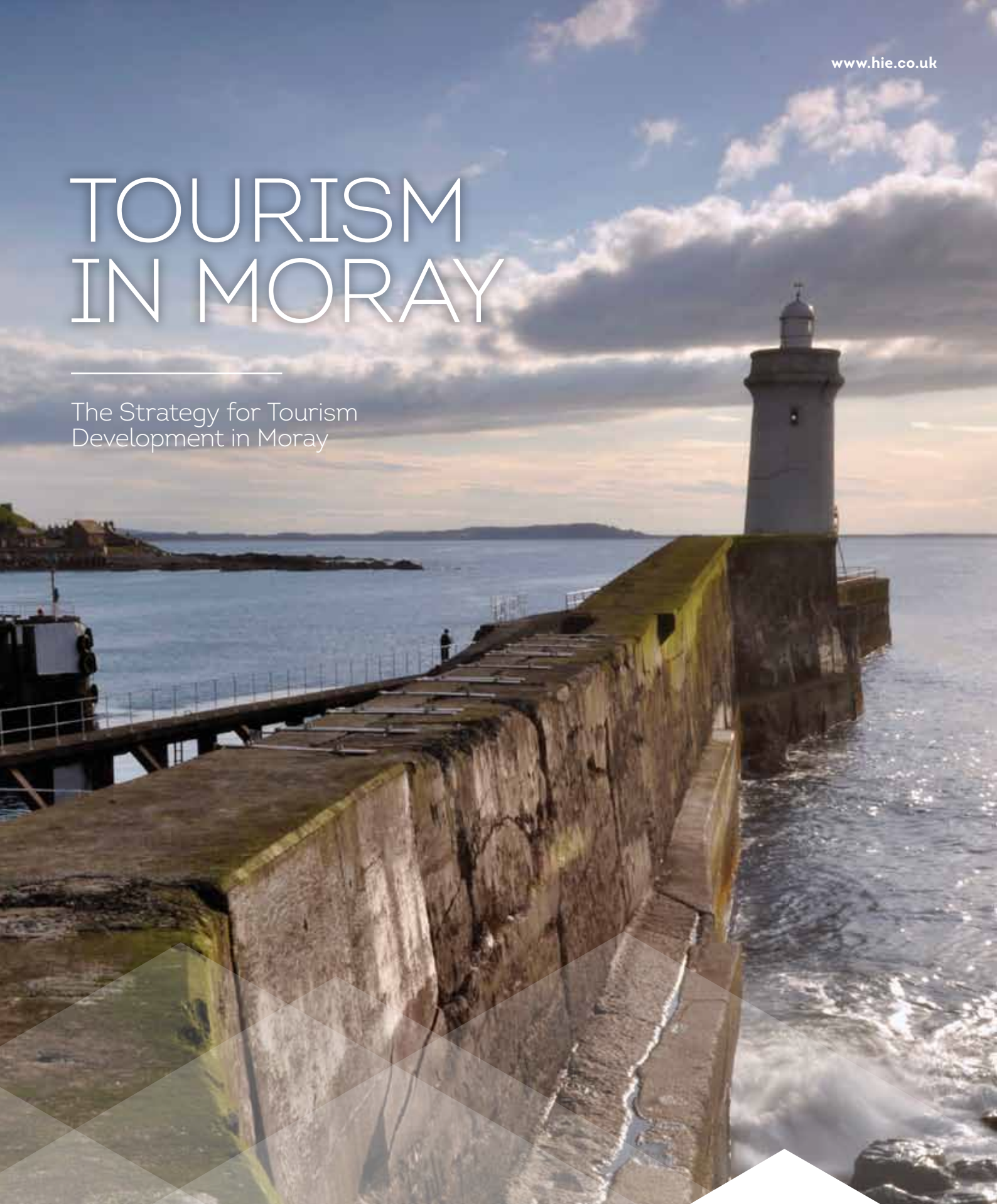


# TOURISM IN MORAY

The Strategy for Tourism  
Development in Moray





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## TOURISM IN MORAY

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# INTRODUCTION

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Tourism generates over 10% of Moray's total employment and 3.8% of the total turnover of businesses. It is a major part of Moray's economy - roughly equivalent to the former RAF base at Kinloss. Unfortunately wages and salaries in the sector are much lower than average. In this strategic framework the potential for growth of the sector is clear. It aims not only to increase the volume of tourism, but also to increase the wage levels, in order to enable recruitment of high quality staff and retention of employees.

Opportunities can be identified with every sector of the economy, and this strategy seeks to maximise the impact of these.

Visitor spending in Moray is in the region of £85m-90m per year. This compares with figures of £330m-335m for Argyll, and £300m for Aberdeenshire. Moray's tourism is considered by many to be underperforming, so there is both the opportunity and the need for significant improvement. This strategy sets out a high level blueprint for such improvement over the next ten years.

“In 2025, Moray will be known nationally and internationally as an exceptionally attractive destination for leisure and business visitors, offering memorable experiences, based on the area’s unique assets, including malt whisky, the heritage of Macbeth, its pure natural environment and superb food using local produce”

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## TOURISM IN MORAY

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### THE VISION

The strategy has been developed to help achieve this vision. It aims to maximise the economic, social and cultural benefits of tourism to Moray and spread the benefits across all sectors of the community.

**By 2025 it will:**

- Double the economic value of tourism
- Double the size of the tourism-related workforce, with at least 80% living locally and fully skilled for their job, and trained in customer care
- Achieve annual occupancy of serviced accommodation rooms of at least 75%, and at least 65% occupancy of self catering units.

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### HOW THIS BENEFITS YOU

- This strategy is for everyone whose business benefits from Moray’s tourist trade.
- It’s about increasing the number of visitors to Moray, which means more potential business for you.
- It’s about working together, connecting products and services, offering more to see and do, giving visitors more opportunities to spend more money.
- It’s about creating more opportunities for everyone, to grow the sector, increase employment and underpin the profitability and sustainability of the industry as a whole.

## ACHIEVING THE OBJECTIVES

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### OBJECTIVE

### IMPLICATIONS

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To double the economic value of tourism

- At least 100% increase in serviced accommodation capacity
- Creating attractive products and compelling experiences to draw new markets
- Higher daily spend, by changing market mix to include more business and educational tourism

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To double the size of the tourism-related workforce, with at least 80% working all-yearround, living locally and fully skilled for their job and trained in customer care

- Develop those forms of tourism that create substantial numbers of well paid jobs - especially business and educational tourism, with customers using serviced accommodation
- Attract a mix of markets that will bring good business all year round
- Promotion of World Host Destination programme to bring the highest standard of customer care to our hospitality and retail businesses
- Forging linkages with creative industries and other

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To achieve annual occupancy of serviced accommodation rooms of at least 75%; and at least 65% occupancy of self-catering units

- Attract a mix of markets that will bring good business all year round - business and educational tourism, as well as leisure tourism, with a strong focus on events development
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## STRATEGIC PRIORITIES FOR TOURISM DEVELOPMENT

To fulfil the objectives, it will be necessary to attract a mix of markets that will bring good high yield business all-year-round. The mix must include business, educational and leisure tourism, with a strong focus on events development. This mix can be achieved by offering unique or exceptional experiences, based on Moray's special assets. On this basis, the following are proposed as the Strategic Priorities for tourism development in Moray over the years to 2025.

	UNIQUE AND POWERFUL SELLING POINTS	HIGH YIELD	GROWTH POTENTIAL	OFF-PEAK TOURISM	BENEFIT TO WIDER ECONOMY	SUSTAINABILITY	TIMESCALE*
Malt whisky experience and heritage	●	●	●	●	●		S
The Real Macbeth	●	●	●	●			M
Flavours of Moray Speyside - superb cuisine, local produce	●	●	●	●	●	●	L
Pure nature of Moray - coast /beaches, wildfowl, dolphins, star gazing, walks			●	●		●	M
Events, including off-peak		●	●	●		●	S
Education and personal development	●	●	●	●	●	●	M
Small conferences and meetings market development		●	●	●	●		L

\* S = short term (2013-14 onwards); M = medium term (2015-2016); L = long term (2017 and beyond)

## LONG TERM MARKET TRENDS

Key trends in the market, to which Moray tourism needs to respond in order to realise its full potential.

- The increase in use of online information and services, including social media, review sites, location based services - increasingly through mobile devices, which facilitate last minute booking.

Moray's businesses should be prepared to meet the digitally savvy visitor by providing easy to book, on line systems through destination portals and direct from tourism businesses that provide the ability to book a complete trip including experiences, accommodation and travel on all communication platforms. Training and awareness-raising for social media and Next Generation Broadband should be facilitated for the tourism sector.

- An ageing population, with an increasing cohort of active, well travelled, web savvy, relatively affluent senior citizens with high expectations - the 'post-war baby boomers'.

Moray is well placed to realise the potential of this demographic segment by providing an quality activities, accommodation and experiences in outstanding, natural surroundings.

- Increasing desire for value for money. Increasingly consumers are comparing prices, seeking special offers and viewing customer reviews and feedback on tourism products.

Thus Moray should focus on delivering excellent service across its tourism product range whilst keeping products competitively priced, with well promoted special offers to attract business during off-peak times.

- Increasing consumer desire for authenticity, valuing encounters with local people, enjoying local produce, being part of local communities and having authentic experiences.

Moray could build on its authentic experiences:

- Coastal villages and heritage, communities such as Findhorn and local food and drink - whisky, shortbread, Baxter's foods, etc. Also, Moray's natural environment is well placed to fulfil the growing interest in nature-based tourism.
- Rapidly growing interest in sharing the experience, through social networks. Recommendations are key motivators for visiting so encouraging visitors to 'pass on their experiences' through Facebook, TripAdvisor and other social media, during and after the trip, has the potential to influence many prospective visitors.

Moray's tourism stakeholders should learn to engage actively with social media, listening to what people are saying, engaging in discussions and monitoring outcomes.

# OPPORTUNITIES FOR GROWTH

## ENABLERS OF GROWTH AND IMPACT

The following are some of the underlying essentials that are necessary to enable the growth of tourism in Moray. The majority of these issues are of general importance to the economic and social well being of Moray generally and, as a result, there are existing mechanisms that are progressing or could progress these 'enablers'.

Enablers:

- Maintaining a high quality environment
- Business support and training
- Active engagement of young people in tourism industry
- Competitiveness
- Visitor orientation
- Improving access to and within Moray
- Bringing communities together to create new products
- Creation of cross-sector awareness, collaboration, cross selling - between tourism and related sectors
- Local supply chain development

## CUSTOMER SERVICE TRAINING

Moray Speyside will focus on value for money and delivering excellent service across its tourism product range or it will not be regarded as a first choice destination within Scotland and lose out to other areas. Skills training and development of employees within the sector will be required to enable the area to compete.

## LOCAL EXPERIENCE

Moray Speyside will build on its authentic experiences – coastal villages and heritage, communities such as Findhorn, flavours of Speyside – whisky, shortbread, Baxter's etc. Moray Speyside's natural environment is well placed to serve the growing interest in the nature-based tourism including appreciation of the outdoors, landscapes, scenery and in protecting the environment.

## SHARING THE EXPERIENCE

Moray Speyside will build on its heritage, ancestry and global connections through those that emigrated from Moray Speyside and those that have the potential to put Moray Speyside on the map, such as the Macbeth connection.

## PROVIDING A GREATER CHOICE OF HIGH QUALITY ACCOMMODATION

Studies by Highlands and Islands Enterprise have shown that there is need for substantially greater bed space in Moray. The opening of the Alexander Graham Bell Centre at Moray College UHI has potential to increase demand for hotel space for large groups attending conferences.

## EVENTS AND FESTIVALS

Moray has shown that it can attract internationally significant events such as the European Pipe Band Championship and Orienteering Championships. The impact of these events has been limited by the need to use accommodation as far away as Pitlochry. Coordination of events, accommodation and transport by a Moray based tourism development organisation will take place, aimed at maximising both the satisfaction levels of visitors and local economic impact.

## STRATEGY IMPLEMENTATION, LEADERSHIP AND GOVERNANCE

In Moray, tourism makes a large contribution to our economy, and is recognised as an important business sector. Moray Chamber of Commerce has extended its established role to become the lead organisation for development of Moray as a high quality visitor destination. Operating as Moray Speyside Tourism and with specialist staff now in post, it will assist the tourism industry in our area to achieve the aims of the Strategy for Tourism.

At the heart of the strategy will be supporting locally led initiatives. Community-based organisations like Elgin BID, Forres Area Community Trust and the Cullen Voluntary Tourist initiative will continue to be essential parts of tourism development in Moray.

A major part of successful strategy implementation will be to form alliances with neighbouring organisations – informal or formal – which will allow sharing of resources, joint promotions and most of all strengthening our ability to meet tourists' needs.

Effective implementation of this tourism strategy requires a mechanism that brings together public and private sectors. A Strategy Implementation Group, including all the key players who will be directly involved in delivering the different elements of Moray's Strategy for Tourism Development.

**FOR MORE INFORMATION CONTACT**

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