

MoraySpeyside Tourism Activity Report 2015-16

May 2016

Moray Speyside Tourism 2015-16

Introduction



Prepared in early 2014 under the auspices of the Moray Economic Partnership, the **Moray Tourism Strategy** notes that tourism generates over 10% of Moray’s total employment and 3.8% of the total turnover of businesses. Visitor spending in Moray is between £85m and £90m per year, an underperformance when compared with other areas in Scotland.

Looking to the future, the strategy envisages that *‘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’*

In April 2014, *MoraySpeyside Tourism*, part of Moray Chamber of Commerce, was established and tasked by the Moray Economic Partnership with assisting the tourism industry in the Moray Speyside area to achieve the strategic vision for tourism, including a doubling of the economic value of tourism by 2025.

Our Marketing Framework

In order to translate the aspirations set out in the Moray Tourism Strategy into a programme of action, we prepared a **Marketing Framework**. The national *Focus Years* – for example last year’s Year of Homecoming - have for some time provided a product development and marketing framework for destinations and businesses across Scotland. We mirror the forthcoming Focus Years in our Moray Speyside Marketing Framework, but in addition we have adopted an over-arching *Made in Moray* ‘meta-theme’ to help bind the focus years together and ensure that our marketing activities take a long-term perspective.

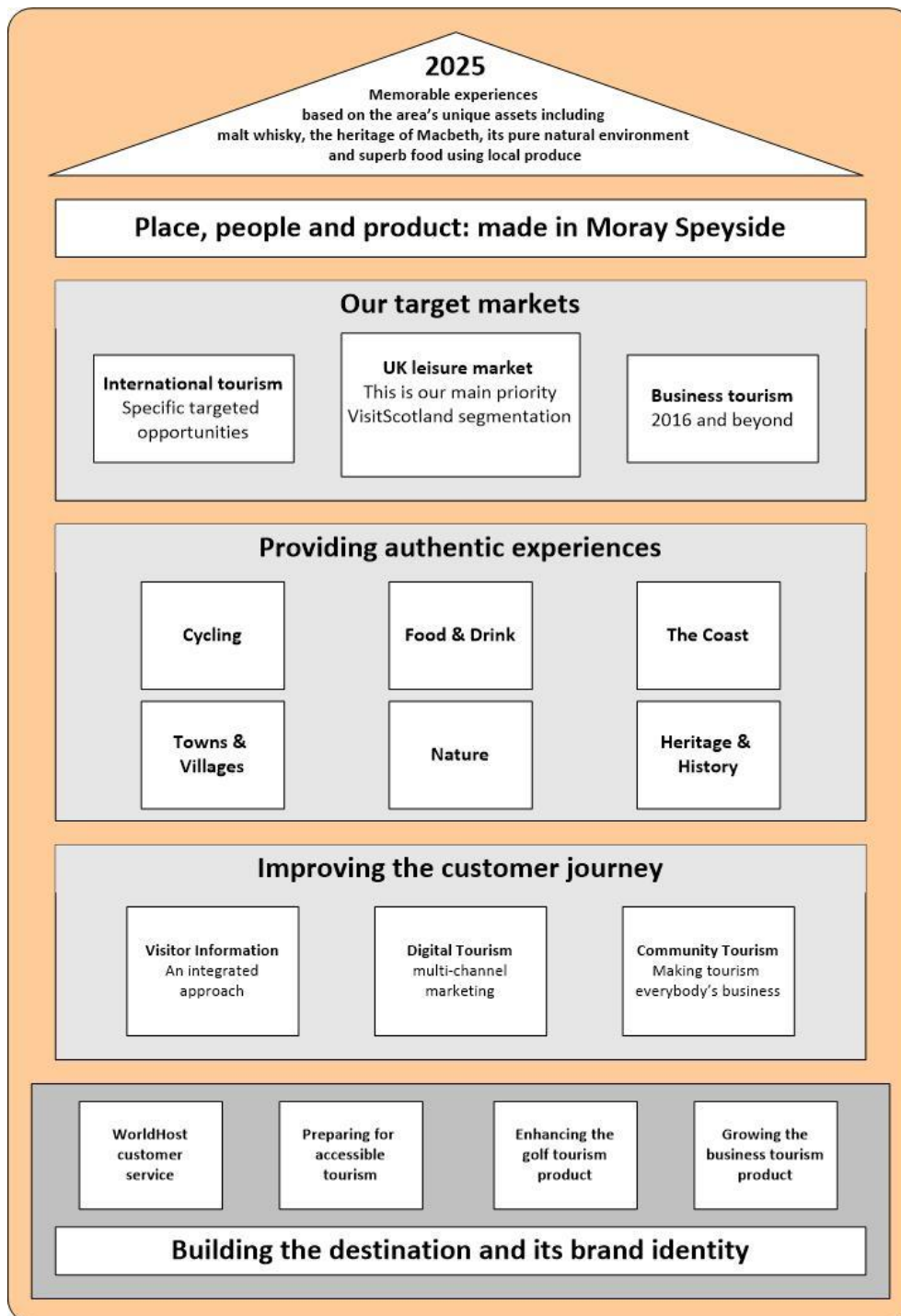
	Scotland The Focus Years	Moray Speyside Made in Moray
2014	Year of Homecoming 	Find yourself in Moray Speyside
2015	Year of Scotland’s Food and Drink 	People and place and the spirit of creation
2016	Year of Innovation, Architecture and Design	Boundless inspiration
2017	Year of History, Heritage and Archaeology	The ebb and flow of time and tide
2018	Year of Young People	This is our home
2019	Focus Year to be announced	

Moray Speyside Tourism 2015-16

Made in Moray summarises the fundamentally important relationship between place, people and product, the interaction of the three giving Moray Speyside its distinctive identity. Based on this long-term perspective, each year the narratives developed in Moray Speyside marketing communications will stay true to the over-arching theme of *Made in Moray* but will evolve as we deliver the memorable authentic experiences that take us towards our 2025 vision for tourism.

Our **marketing framework** can be summarised visually as follows. In format and content, this aligns with the national Tourism Strategy.

Moray Speyside Tourism 2015-16



Progress: General

We have continued to develop collaborative working relationships with, and between, businesses and organisations in Moray Speyside and elsewhere. Practical examples of collaboration include:

- Participation by Moray Speyside's five main towns in a shared stand as part of our VisitScotland Expo presence in 2016
- The Moray Coast Tourism Group
- The Laich of Moray project

Moray Speyside Tourism 2015-16

- Castle to Cathedral to Cashmere
- A series of seminars for tourism businesses titled In Pursuit of the Perfect Visitor
- Joint market research and marketing with the Banffshire Coast Tourism Partnership
- Discussions with the Cairngorm Business Partnership to identify practical ways in which to collaborate

The theme of our 2016 Tourism Summit was collaboration and we will continue to encourage partnership working wherever possible.

Progress: Quantitative Measures

Our principal source of trend data about tourism in Moray Speyside is STEAM, in which HIE Moray has invested for a number of years enabling us to track changes. The following is an extract from the 2015 report. It compares 2015 with 2013, the year in which the Moray Tourism strategy was written - a baseline against which to measure progress towards the long term aim of the strategy.

KEY		All Visitor Types		
An increase of 3% or more				
Less than 3% change				
A Fall of 3% or more				
		2015	2013	+/- %
Visitor Days	000s	1,751.58	1,749.00	0.1%
Visitor Numbers	000s	702.35	700.78	0.2%
Direct Expenditure	£M	80.75	72.15	11.9%
Economic Impact	£M	105.76	94.63	11.8%
Direct Employment	FTEs	2,106	2,288	-7.9%
Total Employment	FTEs	2,526	2,680	-5.7%

The economic impact of tourism increased from £94.63 in 2013 to £105.76 in 2015. A fall in the numbers of day visitors during this period has been more than offset by an increase in visitors staying overnight, particularly in serviced accommodation. At the same time as the economic impact has increased, the numbers of people employed in tourism has reduced, suggesting efficiency savings and consolidation by businesses in response to the state of the economy generally.

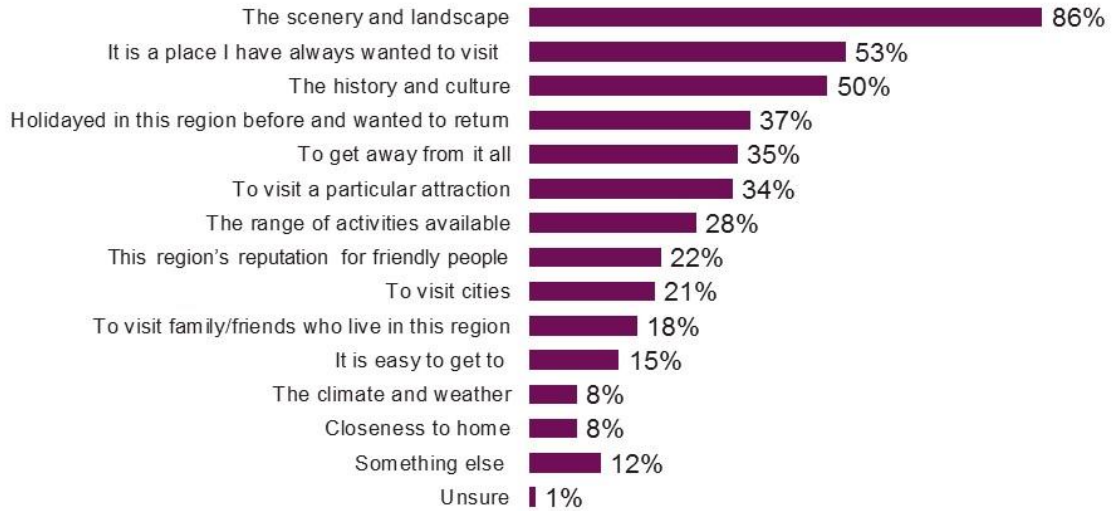
Visitor survey data is not collected locally as a matter of routine so there are no figures available for the balance between leisure and business visitors. If funding were to be made available this might be an interesting one-off study.

VisitScotland's visitor survey activity does not collect a large sample in respect of Moray Speyside, but a recent analysis of data collected for the VisitScotland Insights team provides some useful information for the Highland region we are part of for marketing purposes.

Moray Speyside Tourism 2015-16

Motivations to Visit

Highlands

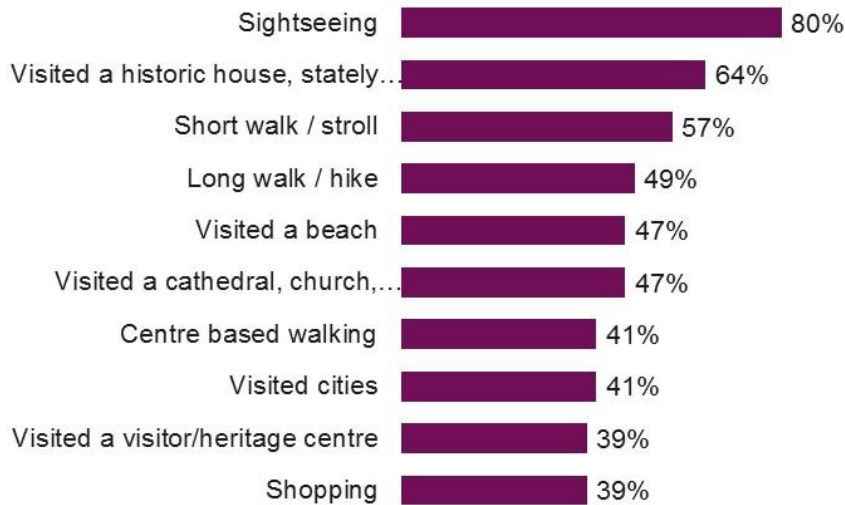


Base: Scotland Visitor Survey. All Highlands & Skye (508)

15 SCOTLAND | ALBA

Top 10 Activities

Highlands



Base: Scotland Visitor Survey. All Highlands & Skye (508)

19 SCOTLAND | ALBA

Moray Speyside Tourism 2015-16

Top tourist attractions in moray	
Scottish Dolphin Centre, Spey Bay	92,835
Brodie Castle, Forres	76,627
Culbin Forest and Shore, by Forres	55,261
Logie Steading Visitor Centre, Forres	50,000
Biblical Garden, Elgin, Elgin	40,000
Elgin Cathedral, Elgin	22,298
Macallan Distillery, Craigellachie	15,550
PLC Aberlour Distillery Visitors Centre, Aberlour	11,631
Pluscarden Abbey, Elgin	11,277
Elgin Museum, Elgin	11,124
Dallas Dhu, Forres	9,426
Glenfarclas Distillery, Ballindalloch	8,348
Cardhu Distillery Visitor Centre, Aberlour	8,152
Falconer Museum, Forres	7,557
Spynie Palace, nr Elgin	6,303
Tomintoul Museum & Visitor Centre, Tomintoul	5,256
Findhorn Heritage Centre & Ice House, Forres	5,143
Dufftown Whisky & Heritage Centre, Dufftown	4,693
Moray Motor Museum, Elgin	4,500
Speyside Visitor Centre, Aberlour	3,942
Balvenie Castle, Keith	3,851

Source: Visitor Attraction Monitor, Moffat Centre, 2014

Top tourist attractions in Moray (by visitor numbers, 2014 data)

SCOTLAND | ALBA

An important measure of success in the future will be levels of social media activity. Moray Speyside Tourism's Facebook 'likes' stood at about 550 in April 2014 but now number 1650. While there is a long way to go in building a larger community of interest around Moray Speyside as a destination, as well as in respect of individual businesses, the increase in Facebook engagement is a positive sign.

Progress: Project and Product Development

- In order to give coherence to the **golf tourism** opportunities in Moray Speyside we held a joint seminar with the Scottish Golf Union. A follow up event will take place in 2016
- We continued to provide support to the **Laich Coast** project, including initial work on exhibition material to promote the project and increase its engagement with the public
- We have participated with colleagues in workshops to develop plans for a **Speyside Whisky Festival** autumn event, to be named 'Distilled'
- The Elgin heritage **Castle to Cathedral to Cashmere** project has moved to implementation and we are involved in the management group and the interpretation sub-group
- The **2016 Tourism Summit** took place in the Alexander Graham Bell Centre at Moray College UHI, attended by 110 colleagues. This year for the first time a charge was made in order to cover the costs of lunch and refreshments, and businesses were also offered the opportunity to purchase exhibition stand space.
- Our series of **industry leadership seminars** – Pursuit of the Perfect Visitor – continues, enabling a group of industry leaders to discuss the development and marketing of tourism in Moray Speyside

Moray Speyside Tourism 2015-16

- We have continued to develop relationships with **neighbouring destinations** and events, including the Banffshire Coast, Cairngorms and the Highland Military Tattoo
- We commissioned the re-origination of the **Moray Speyside brand** artwork and updating of brand guidelines. The work will be completed soon

Progress: Marketing

- We attended **VisitScotland Expo**, Scotland's annual travel trade show, in April 2015 in partnership with the Craigellachie Hotel and Johnstons of Elgin. In April 2016 we doubled our presence with the addition of West Beach Caravan Park, an events and festivals stand and a Moray Speyside towns stand. We intend to increase the Moray Speyside presence still further at the 2017 Expo.
- A successful application to VisitScotland's **Growth Fund** secured match funding to enable four campaign themes to be actioned: the Moray Speyside Larder, Cycle Moray Speyside, the Draw of the Coast and a Forres Area marketing initiative. All of our campaign activities are partnership-based, seeking to work collaboratively with Moray Speyside industry colleagues
- In respect of the **Moray Speyside Larder**, we produced a guide in digital form, placed advertising in the Scots magazine and elsewhere, undertook social media activities including paid 'boosting' of posts, and are currently planning the next phase of campaign activity
- **Cycle Moray Speyside** has involved the identification of a number of cycling 'ambassadors', people involved in cycling who are prepared to promote the area when they attend events elsewhere. A Cycle Moray Speyside guide has been produced in digital and print forms, with a range of supporting marketing activities
- The **Draw of the Coast** is a focus for early 2016, with a guide currently in draft form and planning for supporting marketing activities at an advanced stage
- We have commissioned the production of three short **video clips** based on our campaign themes. The clips will be made available on YouTube and a range of other media
- We worked with the **Forres Area** Tourism Group as partners in the Growth Fund application. A Forres Area Guide has been produced, and initial meetings have taken place with activity/adventure operators in and nearby the Forres area with the aim of promoting the exceptional range of activity options
- In order to support the increasing amount of marketing being undertaken we redeveloped the **morayspeyside.com** web site in Autumn 2015 to give it a fresher, more modern appearance and incorporate new and updated content material. Adding a greater breadth and depth of content is an ongoing process

Moray Speyside Tourism 2015-16

- The release of Justin Kurzel's movie *Macbeth* provided a major opportunity for us to work in partnership with VisitScotland to promote Moray Speyside as **the home of the real Macbeth**. We assisted with the production of a movie map promoting locations in Moray, attended the movie premiere, provided editorial content for publications including the Scots magazine, and welcomed a group of Japanese actors as well as two press trips – one UK-based and the other comprising French and German journalists. We hosted two Moray Speyside Larder themed dinners for the journalists.

We organised a Macbeth movie costume exhibition in five venues in Moray Speyside, and produced a promotional postcard to link the venues into a trail.

The press coverage obtained as a result of Macbeth-related promotional activities included the BBC web site, national, regional and local press, Scots magazine, coverage in French and German lifestyle publications, MFR, BBC Scotland and BBC Radio 4. Measures of advertising equivalence are not effective in measuring the value of coverage in all media but a figure of between £300,000 and £350,000 is not unreasonable.

Ambitions for the Future

Our intention is to continue the development of the Moray Speyside tourism industry and increase the volume and value of tourism in the region. As an organisation, our ambition is to move towards a membership model in which our industry colleagues invest – via membership fees, sponsorship and the purchase of advertising - in the marketing and management of the Moray Speyside destination alongside ongoing public investment.

Our view is that an entirely self-funded membership organisation is not sustainable unless we reduce our ambitions in terms of marketing and product development. Such a reduction would have consequences for the attractiveness of membership and undermine our ability to provide destination leadership.

In summary, our ambition is that *by 2019, Moray Speyside Tourism will be recognised as the destination marketing and management leadership body for the region. It will provide an attractive set of benefits for members and succeed in recruiting members, selling advertising opportunities and attracting sponsorship.* Our ambitions will be guided by the Moray Tourism Strategy and our Marketing Framework.

Conclusion

Two years on from the launch of the Moray Tourism Strategy we are making progress in a number of areas although there remains much to do. We are grateful for the continuing financial support of Highlands and Islands Enterprise and The Moray Council, and the active engagement of many businesses, community members, agency colleagues and the Moray Economic Partnership.

**Moray Chamber of Commerce - Moray Speyside Tourism
May 2016**