



Moray's Visitor Economy 2015

This is a summary of the tourism trends research undertaken for Highlands & Islands Enterprise Moray by Global Tourism Solutions (UK) Ltd.

702,350 Tourism Visits to Moray in 2015, up 1.7% on the previous year

427,730 visits were made by visitors **staying in Moray** as part of a holiday or short break, generating **1.5m nights** in accommodation across the area

1.75 Visitor Days and Nights generated by **staying and day visitors** in **2015**

£105.8 million was generated within the local economy through visitor and tourism business expenditure

274,620 visits made by **Day Visitors** to Moray in 2015



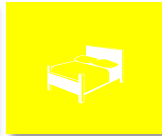
Day Visits generated **£13.7 million** for the economy of the area in 2015

On average, visitors **staying in Moray** stay **3.5 nights** and spend **£24.06 million** on local accommodation

Visitors to Moray are vital to local businesses, supporting more than **2,526 full time equivalent jobs**



Staying visitors generate a **total economic impact of £92.1 million** for businesses in Moray



Economic Impact increased by 12.5% between 2011 and 2015

Staying visitor numbers increased by 12.2% between 2011 and 2015

Total Day Visitors increased by 10.7% between 2011 and 2015

2009
2015

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Staying Visitors

61% of Visits

Day Visitors

39% of Visits

Total
Visitor
Numbers
0.70m

Visitor Numbers

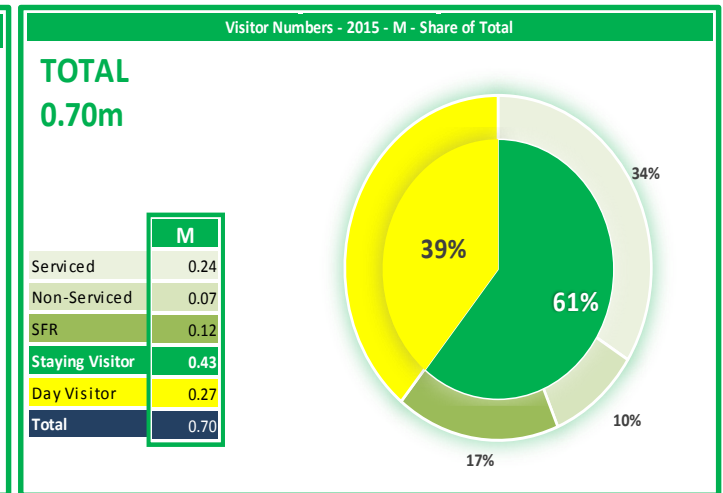
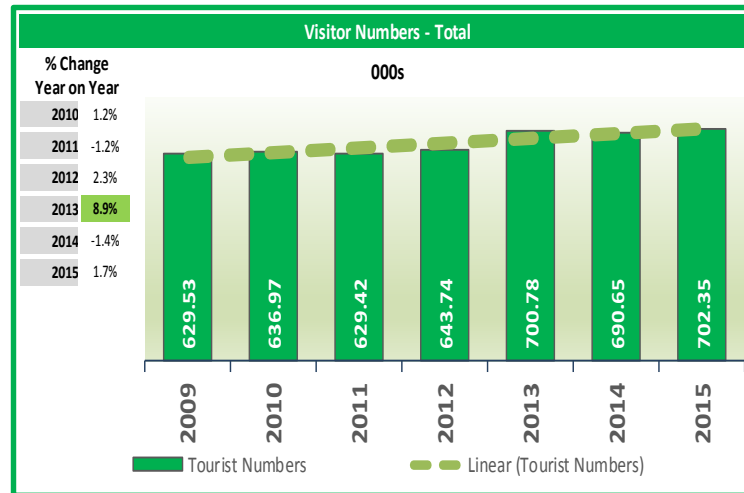
In 2015, there were an estimated **702,350** tourism visits to Moray; representing an increase of **1.7%** on the previous year. Overall, 61% of visitors (427,730) stayed in the area for one or more nights, the remaining 39% of visitors (274,620) were Day Visitors to Moray.

Visitor numbers remained stable in 2015 compared to the previous three years in what was the wettest year since 1910, with twice the

normal rainfall in June and July which dampened down tourism throughout the

summer months. However, since 2009 tourism numbers have increased steadily by 11.6%, showing strong consistent growth.

Within the staying visitor sector, numbers rose by 4.0% on the previous year; those staying in serviced accommodation had an average stay of 1.8 days in Moray.



Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015	000s	238.33	68.09	121.30	427.73	274.62	702.35
2014	000s	223.77	69.20	118.13	411.10	279.55	690.65
Change 14/15	%	6.5	-1.6	2.7	4.0	-1.8	1.7

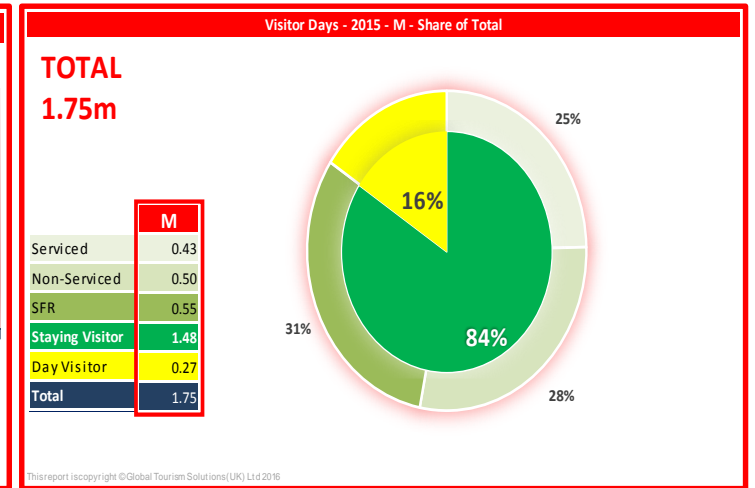
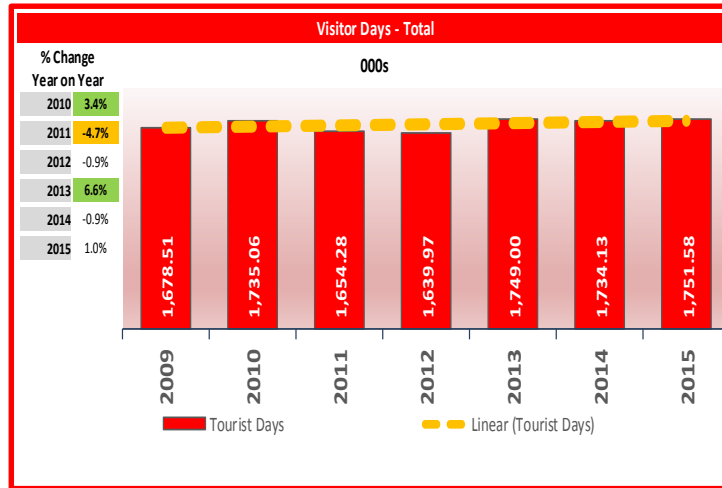
**Total
Visitor
Days**
1.75m

Visitor Days

Visitor Days take into account those visitors who stay at any destination for more than a day. For example, if a family of five stay three nights, they will account for five visitors, and fifteen visitor days. **Visitors to Moray spent an estimated 1,751,580 days in the area as part of a tourism day trip, holiday or short break in 2015; total visitor days were up 1.0% in what was, a very wet summer.**

Staying visitors account for 84% of all visitor days, with **non-serviced**

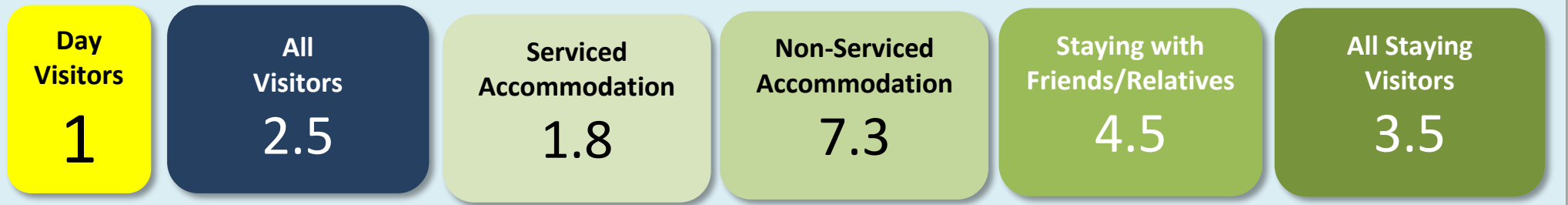
accommodation accounting for 28% of the total and average stays of 7.3 days, which is very high, indicating a high volume of week-long stays. Since 2009 visitor days for day visitors and staying visitors have increased gradually over the years by 4.4% (the serviced accommodation sector rose by 10.8% over the same period; day visitors by 9.1%).



Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015	000s	431.65	498.43	546.88	1476.96	274.62	1751.58
2014	000s	416.73	502.61	535.24	1454.58	279.55	1734.13
Change 14/15	%	3.6	-0.8	2.2	1.5	-1.8	1.0

Average length of stay in days for different visitor types to Moray in 2015



Total Economic Impact
£105.76m

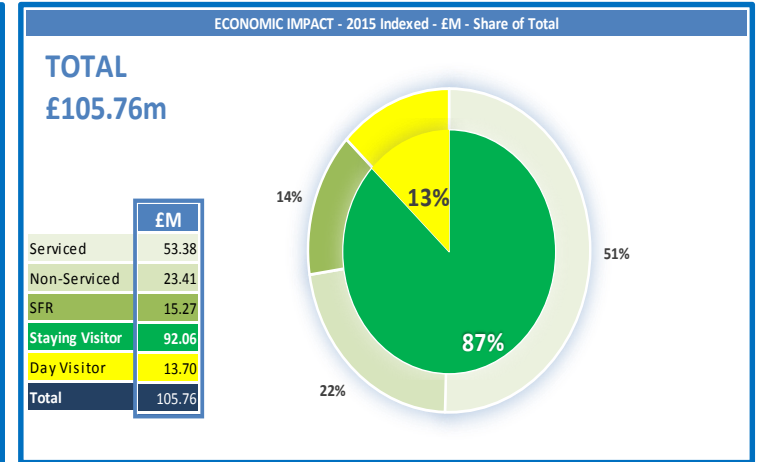
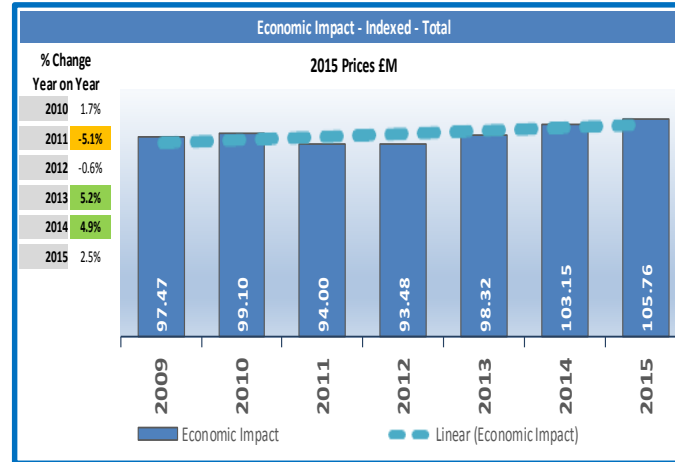
Economic Impact

Tourism visits to Moray in 2015 generated a total economic impact of £105.76m, an increase during a rainy year of 3.7% on 2014, also a gradual increase of 8.5% since 2009 (all monetary figures in this narrative report are indexed to allow direct comparison with 2015 figures). The total economic impact in 2015 comprises the expenditure of visitors on goods and services, totalling £80.75m, and the indirect and induced economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £25.01m.

The greatest gain in economic impact over the past year took

place within the serviced sector, which increased by 6.7% (and steadily by 17.3% since 2009); day visitor spend decreased slightly by -1.4% due to adverse weather.

The average spend per visitor per day to Moray is £60.38; per day visitor is £49.89; per non-serviced accommodation visit £342.88 and per serviced accommodation visit is £222.61.



Key Figures: Economic Impact

Economic Impact		Served	Non-Served	SFR	Staying Visitors	Day Visitors	All Visitors
2015	£m	53.38	23.41	15.27	92.06	13.70	105.76
2014	£m	50.03	23.31	14.78	88.12	13.90	102.02
Change 14/15	%	6.7	0.4	3.3	4.5	-1.4	3.7

Average economic impact generated per person by each type of visitor to Moray in 2015



**Total
FTEs
Supported
in 2015
2,526**

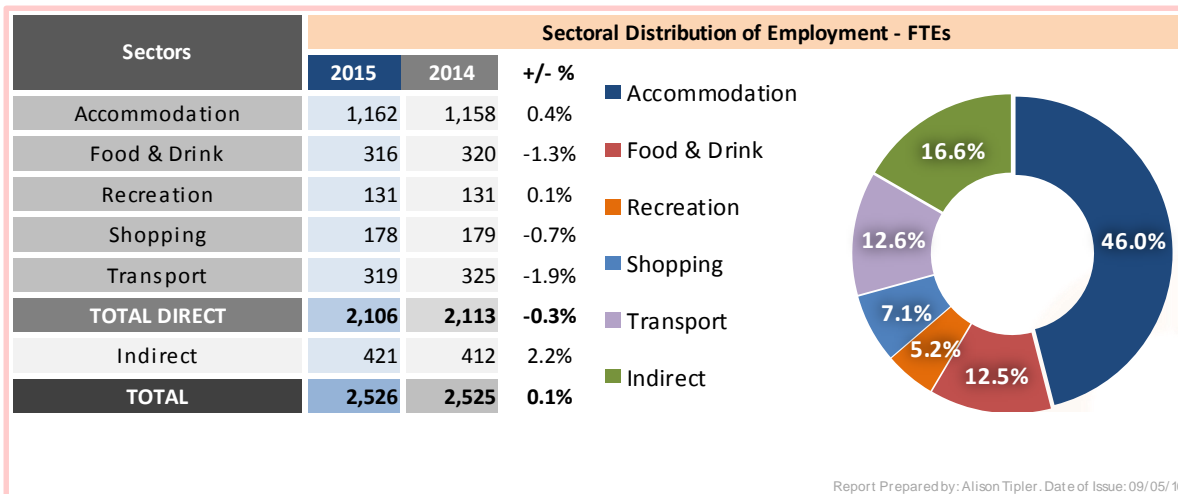
Definitions:

- **Accommodation:** Payments for overnight stays in accommodation, such as room rates for serviced accommodation, or pitch fees and hire charges for non-serviced accommodation.
- **Recreation:** Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
- **Transport:** Expenditure within the destination on travel, including fuel and public transport tickets.
- **Food and Drink:** Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries.
- **Shopping:** What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items.
- **Indirect:** The expenditure by local tourism businesses within the local supply chain.

Employment Supported by Tourism

The expenditure and activity of visitors to Moray in 2015 supported a total of 2,526 Full-Time Equivalent jobs (FTEs). Employment has remained relatively stable over the past year, marginally up by 1.0% since 2014. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,106 FTEs in 2015, and the indirect and induced employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 421 FTEs. The largest sectors for direct employment were Accommodation (1,162 FTEs); followed by Transport (319 FTEs); Food & Drink (316 FTEs) and then Shopping (178 FTEs).

Employment Supported by Tourism 2014-2015: Full-Time Equivalents (FTEs) by Type



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STEAM FINAL TREND REPORT FOR 2009-2015

HIE - MORAY

Comparing 2015 and 2014

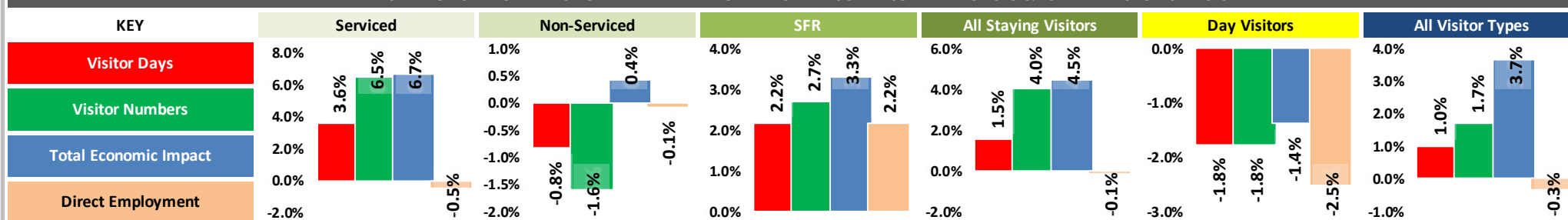
All £'s Historic Prices

COMPARATIVE HEADLINES

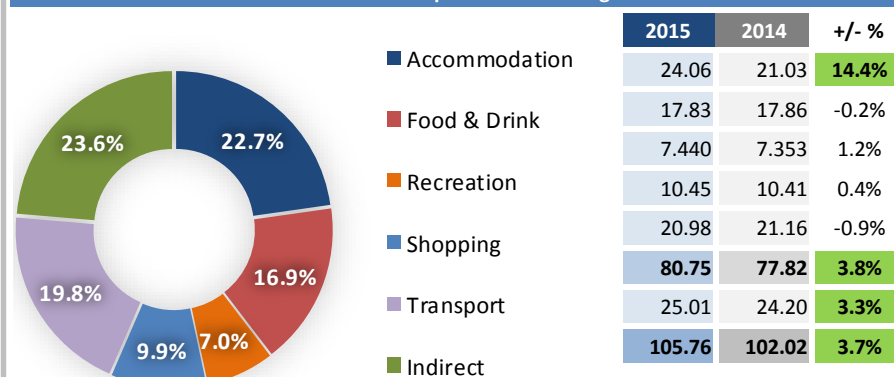
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2014 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation									Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
	Serviced			Non-Serviced																	
	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %			
Visitor Days 000s	431.65	416.73	3.6%	498.43	502.61	-0.8%	546.88	535.24	2.2%	1,476.96	1,454.58	1.5%	274.62	279.55	-1.8%	1,751.58	1,734.13	1.0%			
Visitor Numbers 000s	238.33	223.77	6.5%	68.09	69.20	-1.6%	121.30	118.13	2.7%	427.73	411.10	4.0%	274.62	279.55	-1.8%	702.35	690.65	1.7%			
Direct Expenditure £M																80.75	77.82	3.8%			
Economic Impact £M	53.38	50.03	6.7%	23.41	23.31	0.4%	15.27	14.78	3.3%	92.06	88.12	4.5%	13.70	13.90	-1.4%	105.76	102.02	3.7%			
Direct Employment FTEs	1,272	1,278	-0.5%	467	467	-0.1%	193	189	2.2%	1,932	1,935	-0.1%	173	178	-2.5%	2,106	2,113	-0.3%			
Total Employment FTEs																2,526	2,525	0.1%			

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2014 - IN HISTORIC PRICES



Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



Sectoral Distribution of Employment - FTEs

