



## Moray Speyside's Visitor Economy 2018

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

**797,880 Tourism Visits** to Moray Speyside in 2018

**481,810 visits** were made by visitors **staying in Moray** as part of a holiday or short break, generating **1.6m nights** in accommodation across the area

**1.9m Visitor Days and Nights** generated by **staying and day visitors** in **2018**

**£130 million** was generated within the local economy through visitor and tourism business expenditure

**316,070 visits** made by **Day Visitors** to Moray in 2018



**Day Visits** generated **£16.8 million** for the economy of the area in 2018

On average, visitors **staying in Moray** stay **3.3 nights** and spend **£27.6 million** on local accommodation

Visitors to Moray are vital to local businesses, supporting more than **2,888 full time equivalent jobs**



**Staying visitors** generate a **total economic impact of £113 million** for businesses in Moray



**Total Day Visitors increased by 27.4%** between 2011 and 2018



**Economic Impact increased by 27.6%** between 2011 and 2018

**Staying visitor numbers increased by 26.4%** between 2011 and 2018

2009  
2018

## 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

60% of Visits

Day Visitors

40% of Visits

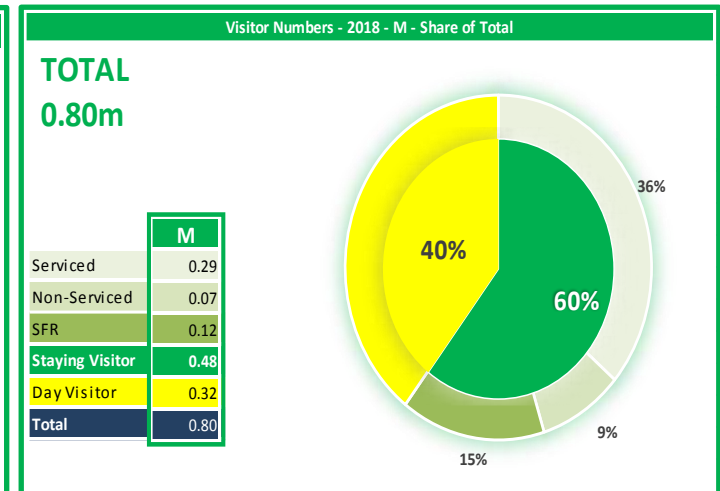
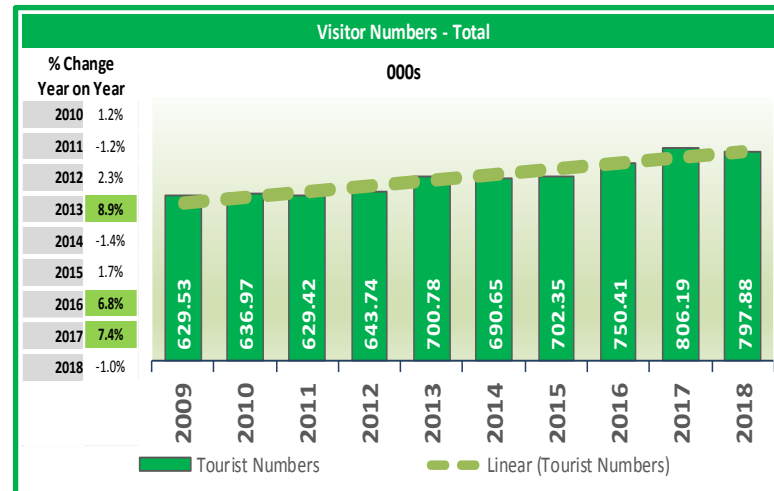
Total  
Visitor  
Numbers  
0.80m

## Visitor Numbers

In 2018, there were an estimated **797,880** tourism visits to Moray Speyside; representing a marginal decrease of **-1%** on the previous twelve months. As in 2017, 60% of visitors (.48m) stayed in the area for one or more nights, the remaining 40% of visitors (.32m) were Day Visitors to Moray Speyside. Within the staying visitor sector, .29m visitors stayed in serviced accommodation, representing 36% of all visitors.

Total visitor numbers to Moray

Speyside have steadily increased since 2011 by 26.8%. The greatest increase during this period in visitor numbers has been within the serviced accommodation sector, which has grown by 41.2%. The area's Day Visitors have also increased substantially during the past nine years by 27.4%.



## Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	000s	289.45	71.00	121.36	481.81	316.07	797.88
2017	000s	296.43	67.18	121.78	485.39	320.80	806.19
Change 17/18	%	-2.4	5.7	-0.3	-0.7	-1.5	-1.0

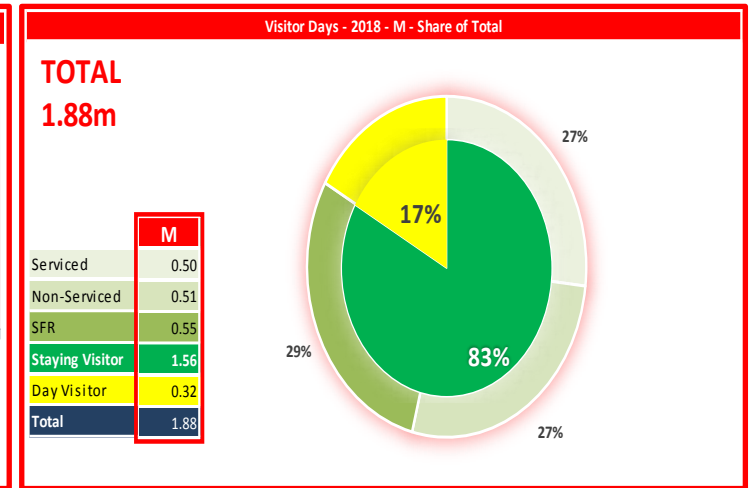
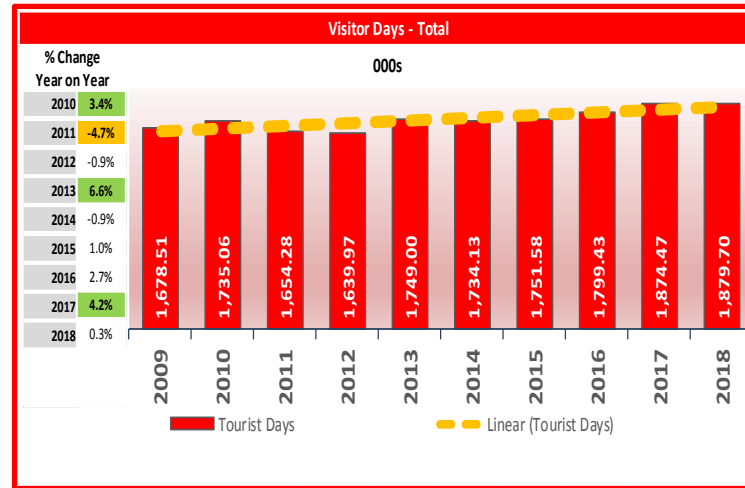
**Total  
Visitor  
Days  
1.88m**

## 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 Speyside spent an estimated 1.88m days in the area as part of a tourism day trip, holiday or short break in 2018; total visitor days were slightly up by 0.3%.**

Staying visitors continue to account for 83%

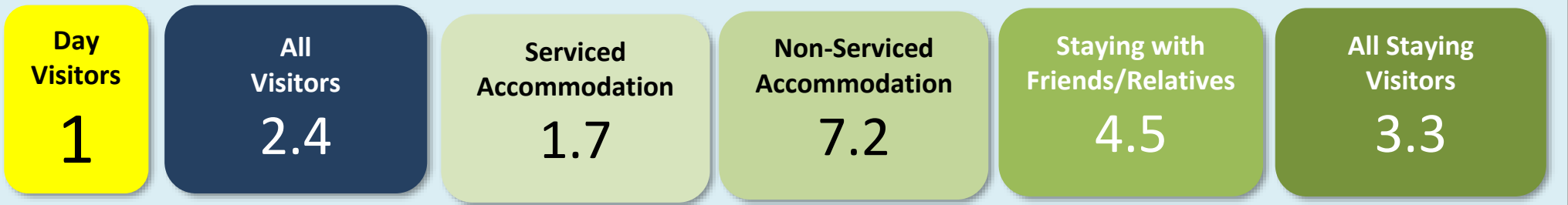
of all visitor days, unchanged from 2016. Both serviced and non-serviced accommodation each represent 27% of staying visitors. The average length of stay for all visitors has risen to 2.4 days; for non-serviced this rises to 7.2 days, indicating a very high proportion of weekly rentals.



### Key Figures: Visitor Days

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	000s	503.93	510.83	548.86	1,563.62	316.07	1,879.70
2017	000s	511.62	490.98	551.08	1,553.67	320.80	1,874.47
Change 17/18	%	-1.5	4.0	-0.4	0.6	-1.5	0.3

### Average length of stay in days for different visitor types to Moray in 2018



**Total Economic Impact**  
**£129.63m**

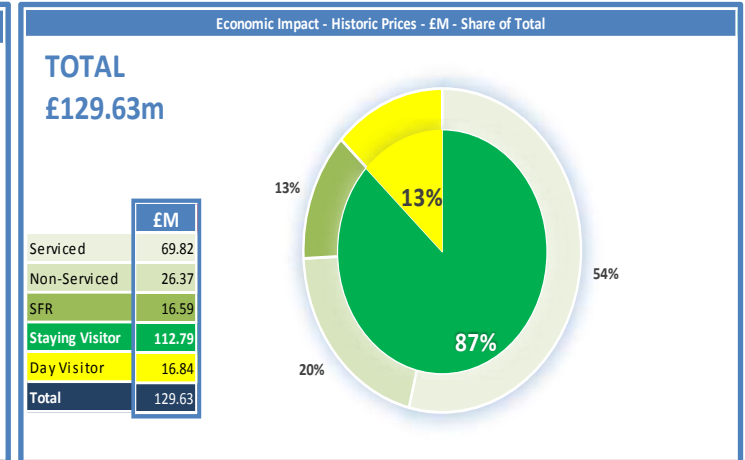
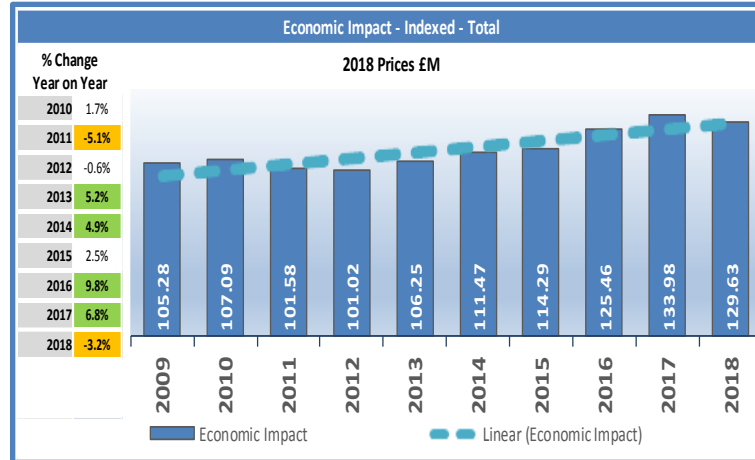
## Economic Impact

Tourism visits to Moray Speyside in 2018 generated a total economic impact of £129.63m, a slight increase of 0.6% on 2017, but a substantial increase of 27.6% since 2011 (all monetary figures in this narrative report are indexed, unless stated, to allow direct comparison). The total economic impact in 2018 comprised the expenditure of visitors on goods and services, totalling £99.29m, and the indirect and induced economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £30.34m.

The greatest economic impact since

2011 has taken place in the serviced sector, which has increased significantly by 47.4%, followed by Day Visitor economic impact at 23.7%.

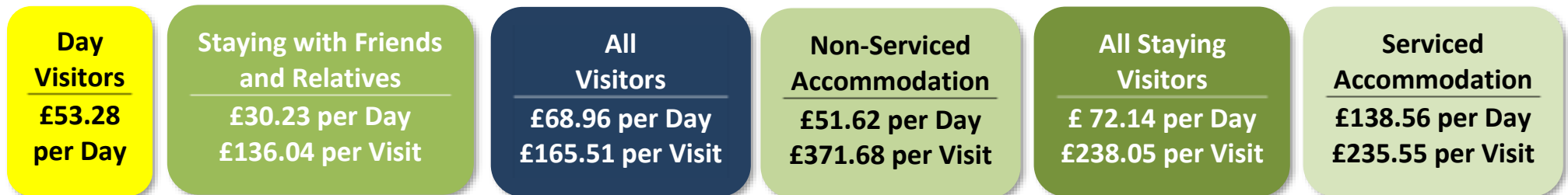
The average spend per visitor per day to Moray has risen to £68.96; per non-serviced accommodation visit to £371.68 and per serviced accommodation visit to £138.56 per day, and £235.55 per visit.



### Key Figures: Economic Impact (un-indexed)

Economic Impact		Served	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2018	£m	69.82	26.37	16.59	112.79	16.84	129.63
2017	£m	71.47	24.82	16.07	112.36	16.52	128.88
Change 17/18	%	-2.3	6.3	3.3	0.4	1.9	0.6

### Average economic impact generated per person by each type of visitor to Moray in 2018



**Total  
FTEs  
Supported  
in 2018  
2,888**

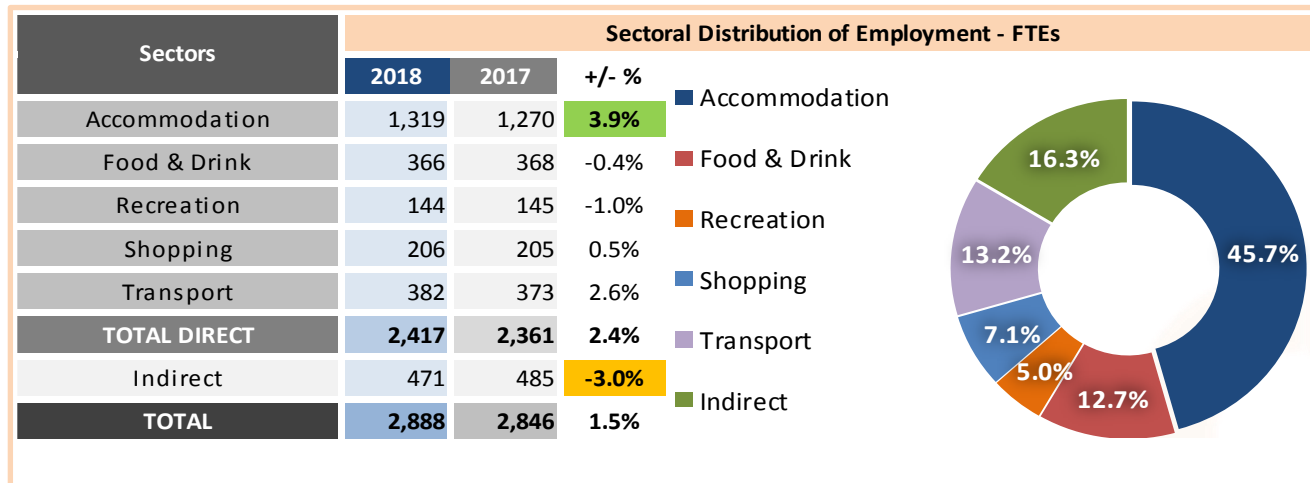
**Definitions:**

- **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 Speyside in 2018 supported a total of 2,888 Full-Time Equivalent jobs (FTEs). Employment has risen steadily over the past three years since 2014 by 14.4%. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,417 FTEs in 2018, and the indirect and induced employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 471 FTEs. The largest sectors for direct employment remain Accommodation (1,319 FTEs); followed by Transport (382 FTEs); Food & Drink (366 FTEs) and then Shopping (206 FTEs).

**Employment Supported by Tourism 2017-2018: Full-Time Equivalents (FTEs) by Type**




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