





Background & Methodology



Moray Speyside Tourism is interested in understanding interest levels and expectations of a Moray TBID among tourism businesses within Moray Speyside.

STR are conducting a quantitative and qualitative piece of research on behalf of Moray Speyside Tourism to explore views on a Moray TBID. For the quantitative phase, an online survey was sent out to local tourism businesses and 135 responses were received. This report outlines the findings from this survey.

© 2018 STR. All Rights Reserved.



A reminder of the definition of a TBID

A Tourism Business Improvement District (TBID) is the gathering of local businesses to support the growth and development of their local area's tourism industry. It gives businesses a voice and financial stake in the future direction of tourism in the area.

An agreed, moderate levy is collected from members and is used to fund key tourism priorities. Members decide how funds are spent and what the key priorities should be.

TBIDs are not designed to replace public sector funding but are supposed to supplement existing funding. They are not a council project, but an industry-led initiative focusing only on tourism development, to benefit the entire region's tourism industry.

For a TBID to exist a majority of businesses need to vote for it for an agreed period of time (normally 5 years). After this time members vote on whether it should continue. This ensures that the work remains current and focused on the needs of its members.

© 2018 STR. All Rights Reserved.

Research Objectives



Key research objectives:

- Explore the interest levels amongst Moray Speyside tourism businesses in a TBID
- Understand the expectations of a TBID
- Establish key priorities for a TBID
- Collate feedback on the TBID structure/ process



Profile of Businesses

Business type



56%

Local independent business (single unit)



19%

Local independent business (multiple units)



12%

Social Enterprise/charity/trust



9%

International, Scotland or UK-wide chain/brand

Sector



46%

Accommodation



15%

Retail/ shopping



29%

Visitor Attraction



10%

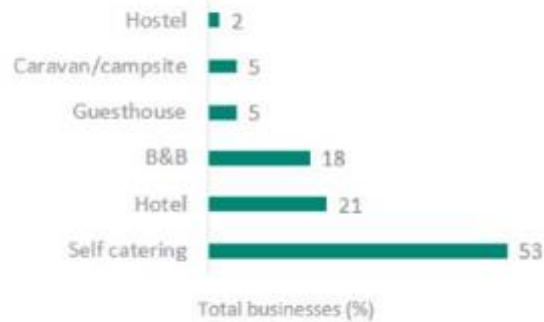
Not for profit



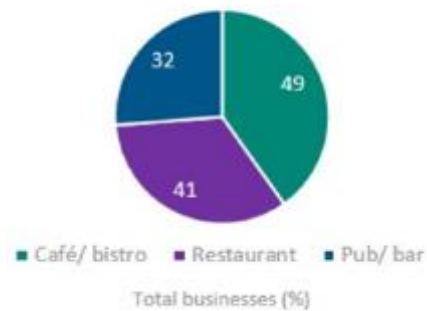
27%

Food and Beverage

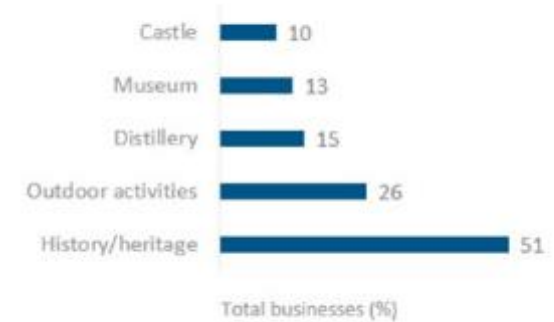
Accommodation



Food/ beverage



Visitor attraction



© 2018 STR. All Rights Reserved.

Moray Speyside is an increasingly good place to do business

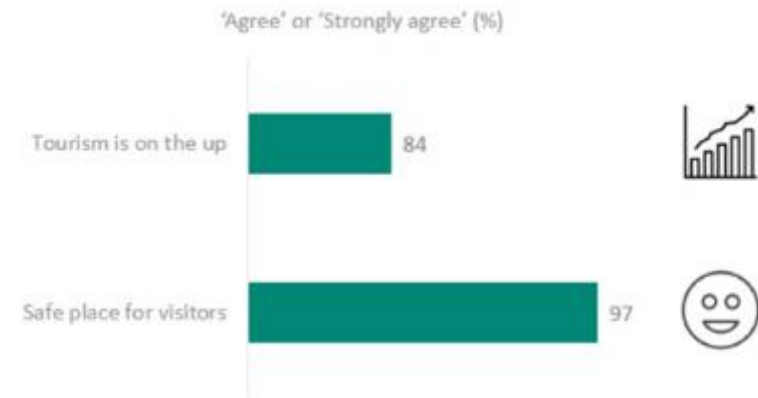


Businesses felt that Moray Speyside was a 'good' or 'very good' place to do business in, and is currently better than it was 5 years ago in 2013.



Particular strengths associated with Moray Speyside

It is felt that tourism is on the up in Moray Speyside, and that it is a safe place for visitors to go



* Core tourism: accommodation, food & beverage, visitor attractions.

Q7: On a scale of 1 to 5 where 1= very poor and 5= very good what is your overall view of Moray Speyside as a place to do business?

a. Now, in 2018

b. 5 years ago (or since establishment if less)

Q8: Thinking about Moray Speyside, on a scale of 1 to 5, where 1= strongly disagree and 5 = strongly agree, to what extent do you agree or disagree with the following statements about Moray Speyside?

© 2018 STR. All Rights Reserved.



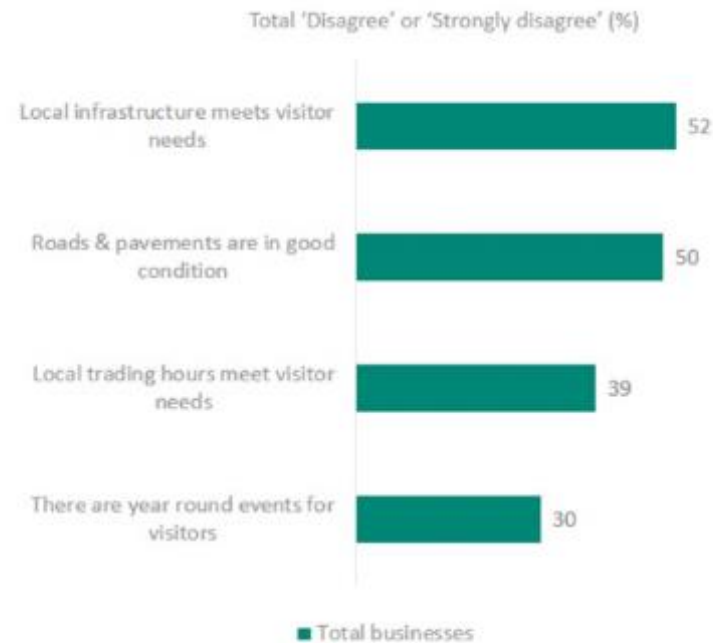
However, there are still some areas for improvement

Businesses felt that various elements are not currently meeting visitor needs.

Over half of businesses 'disagreed' or 'strongly disagreed' that local infrastructure met visitor needs and half felt that roads and pavements were not in good condition.

Many also felt that local trading hours did not meet visitor needs and that there were not year round events for visitors.

These figures were similar between core tourism businesses and total visitors overall.



QB: Thinking about Moray Speyside, on a scale of 1 to 5, where 1= strongly disagree and 5 = strongly agree, to what extent do you agree or disagree with the following statements about Moray Speyside?

© 2018 STR. All Rights Reserved.

Businesses feel that Moray Speyside has a lot to offer



Businesses feel that Moray Speyside has a rich offering for visitors. The main draws to the area are thought to be the outstanding natural beauty, wildlife, diversity of visitor attractions, range of food and drinks outlets, whisky experiences, and local friendliness. The weather was also thought to be good (for Scotland!).



"There are numerous high-quality visitor attractions ranging from outdoor activities to whisky experiences and everything in between."

"Beautiful countryside and coast, interesting leisure activities such as golf, sightseeing, sailing and other watersports, shooting and fishing, reasonable weather."



"World class distilleries to visit , fantastic scenery ,amazing variety of potential outdoor activities, very friendly and accommodating local people, great Moray/Speyside food & drinks on offer"

"The beautiful coastline (featured in National Geographic top 12 a few years ago) flora and fauna, dolphin and whale spotting, great coastal walks and for those interested great opportunities to take part in active watersports from picturesque harbours and beautiful uncrowded beaches."

However, there are some perceived barriers



Although it was felt that Moray Speyside has a lot to offer, a few areas for improvement were highlighted. Some felt that business opening hours were limited, that transport links and public transport could be improved and that more accommodation and evening restaurants would be beneficial to the area. Additionally it was felt by some that there was a lack of collaboration between businesses and sectors, and that the area was often overlooked in favour of other local areas



"Lack of choice of decent places to eat on an evening. Poor public transport. Inward looking businesses not keen on collaborating with other local businesses for the greater good. Lack of good quality accommodation."

"Infrastructure to link key tourist areas together. Visitors are not keen to take 3 different buses to get to a distillery or outdoor pursuit."

"Very few visitors know about the area and what it has to offer. Little exposure to the global market."



"Opening hours of cafes, most seem to close at 4pm. Excluding pubs there is not enough family eating establishments open between 4- 7 PM. Most businesses only cater for Scottish Holiday periods and not the English ones."

"1. Short opening hours 2. Lack of accommodation"

The TBID was well received

Overall the idea of a TBID was well received. Businesses felt that it was likely to increase footfall and improve the area. They liked the collective nature of the TBID and thought it was feasible as businesses already worked well together and they had seen other areas where TBIDS had worked previously. There were some concerns that not everyone who was contributing would benefit or see a return on investment and some concern over the cost.

"I think working as a collective should have been done years ago to embrace what our area has to offer locals and visitors. This would be a brilliant asset."

"Sounds like a great idea, puts the control back in the hands of the businesses that need it."

"Having worked with BIDs in other areas of North Scotland I think it is a forward-thinking plan in order to continue to grow and develop the offering in the region."



"I would be keen to see this developed in Moray, however this would need to be balanced with the increased financial pressures faced with rates etc."

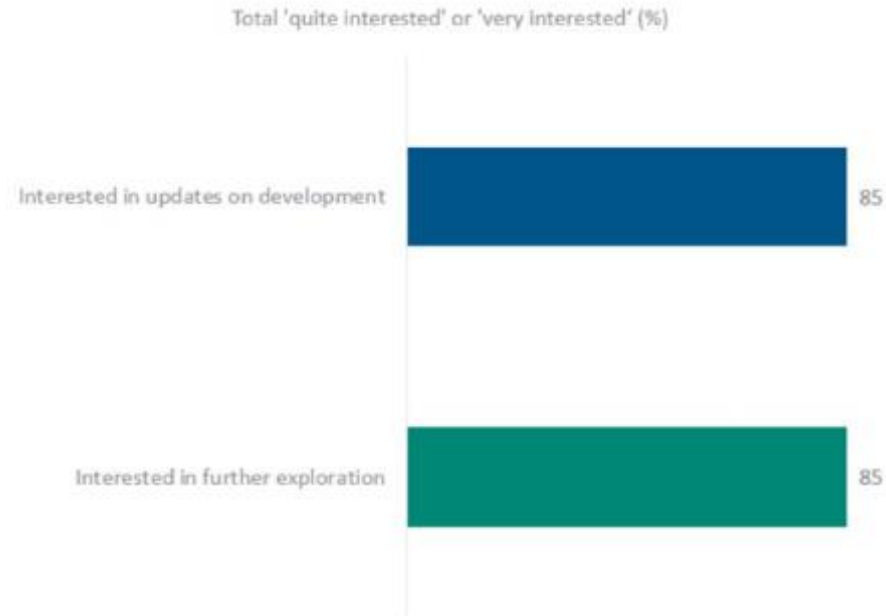
"I have been impressed by the work of Elgin BID and I can see the benefits and potential of a TBID. I like the idea of every business having a vote as this acts as a leveler between big and small businesses."

There is high initial interest in further exploration of a Moray Speyside TBID model



85% of businesses said that they would be interested in further exploration of a TBID in Moray Speyside. This was the same for both Core Tourism businesses and the total number of businesses.

85% of businesses additionally said that they would like updates on development of a Moray Speyside TBID. Of the core tourism businesses, 84% said that they would like updates.



Q12. On a scale of 1 to 5 where 1 = not at all interested and 5 = very interested, how interested would you be in the following:
a) Further exploration of a Moray Speyside TBID model b) Updates on development of a Moray Speyside TBID model c) Becoming a Moray Speyside TBID member d) Making an annual financial contribution to a Moray Speyside TBID e) Influencing the priorities of a Moray Speyside TBID f) Influencing the spending of a Moray Speyside TBID



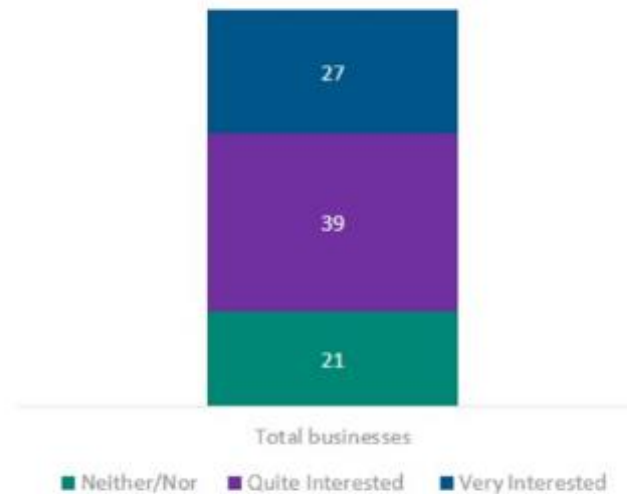
Many also showed an interest in becoming members

Of the total number of businesses 66% were 'interested' or 'very interested' in becoming members of the TBID. When 'neither/nor' is added into the figures this becomes 87% of businesses.

There could be up to 750 businesses eligible to become levy paying businesses. Of the businesses who replied to the survey 66% (or 89 businesses) said that they would be 'quite interested' or 'very interested' in taking part.

These businesses are likely to be more engaged in the TBID than other local tourism businesses as they responded to the questionnaire.

Interested in becoming a TBID member (%)



Q12. On a scale of 1 to 5 where 1 = not at all interested and 5 = very interested, how interested would you be in the following:
a) Further exploration of a Moray Speyside TBID model b) Updates on development of a Moray Speyside TBID model c) Becoming a Moray Speyside TBID member d) Making an annual financial contribution to a Moray Speyside TBID e) Influencing the priorities of a Moray Speyside TBID f) Influencing the spending of a Moray Speyside TBID

© 2018 STR. All Rights Reserved.

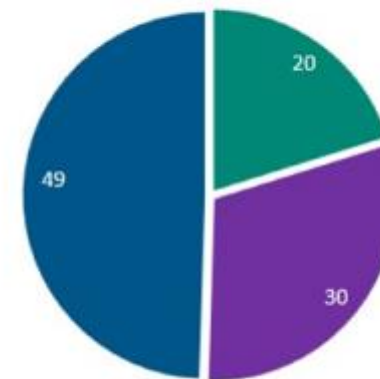


Businesses were open to making a financial contribution

Businesses interested in making an annual financial contribution (%)

49% of the total businesses and 52% of the core tourism businesses said that they were 'quite interested' or 'very interested' in making a financial contribution to a Moray Speyside TBID.

A further 30% of total businesses said that they were 'neither/nor', potentially suggesting that some additional businesses may be willing to make a financial contribution.



- Not interested/ Not at all interested
- Neither/nor
- Quite interested/ very interested

Q12. On a scale of 1 to 5 where 1 = not at all interested and 5 = very interested, how interested would you be in the following:
a) Further exploration of a Moray Speyside TBID model b) Updates on development of a Moray Speyside TBID model c) Becoming a Moray Speyside TBID member d) Making an annual financial contribution to a Moray Speyside TBID e) Influencing the priorities of a Moray Speyside TBID f) Influencing the spending of a Moray Speyside TBID

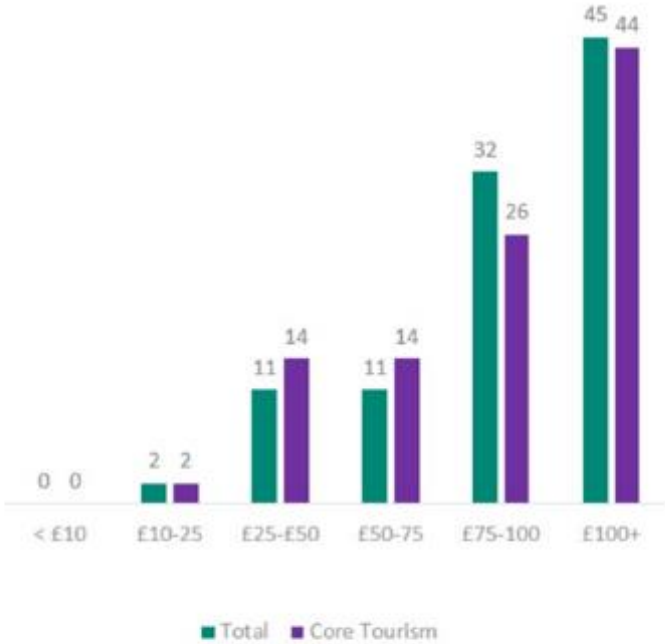
The majority of businesses were willing to contribute over £75



When asked about the amount that they would contribute, 45% of total businesses said that they would be willing to contribute £100+, and a further 32% said that they would be willing to contribute between £75-£100.

Taking the sample as being representative of Moray Speyside Tourism businesses and estimating a total number of up to 1,000 businesses, this would suggest that up to 450 businesses would be willing to contribute over £100. However, it is worth keeping in mind that this sample is likely to be more engaged than the average business in Moray Speyside.

Amount willing to contribute annually (%)



Q13. You indicated a willingness to contribute financially to a Moray Speyside TBID. How much would you anticipate contributing per year to a TBID? SINGLE CODE
 A) £10 or less b) Between £10 - £25 c) Between £25 - £50 d) Between £50 - £75 e) Between £75 - £100 f) £100 or more

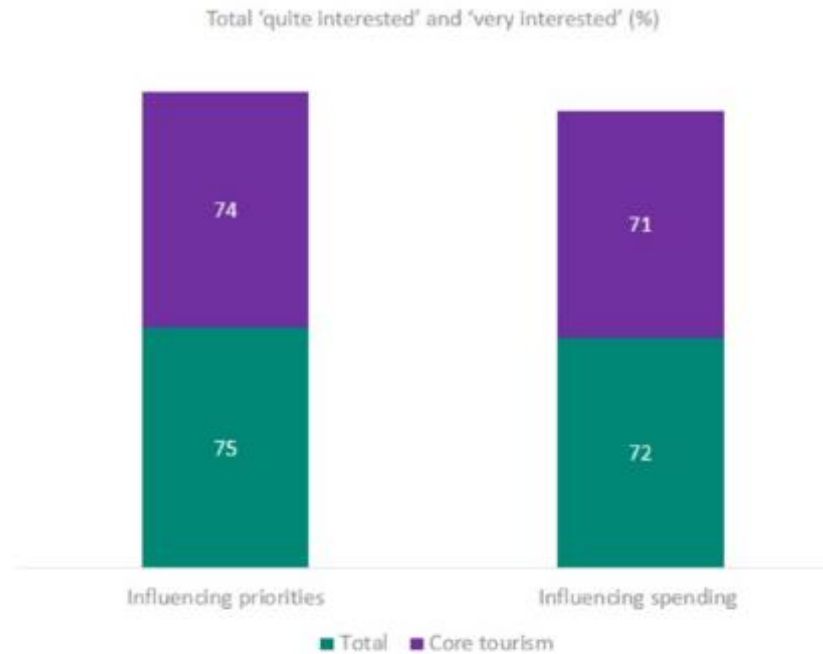
© 2018 STR. All Rights Reserved.



High engagement in influencing priorities and spending

75% of the total businesses said that they were 'quite interested' or 'very interested' in influencing priorities for a Moray Speyside TBID. This was very similar at 74% for core tourism businesses.

Similarly, 72% total businesses were 'quite' or 'very' interested in influencing spending for a TBID and 71% of core tourism businesses, indicating a high desire for involvement in the TBID process.



Q12. On a scale of 1 to 5 where 1 = not at all interested and 5 = very interested, how interested would you be in the following:
a. Further exploration of a Moray Speyside T-BID model b. Updates on development of a Moray Speyside T-BID model c. Becoming a Moray Speyside T-BID member d. Making an annual financial contribution to a Moray Speyside T-BID e. Influencing the priorities of a Moray Speyside T-BID f. Influencing the spending of a Moray Speyside T-BID

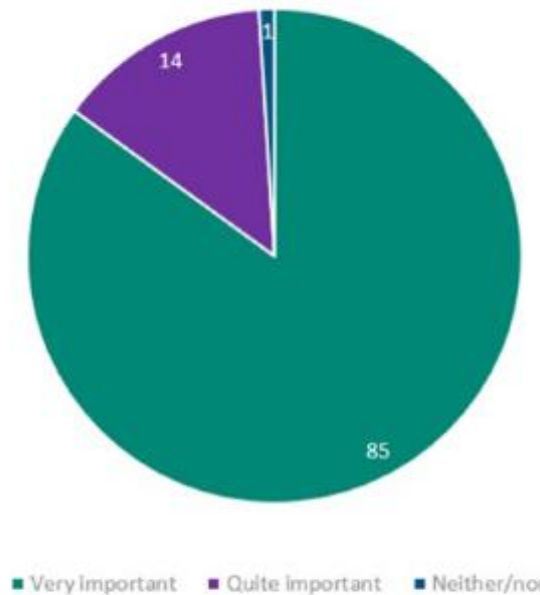


Of the priorities for the visitor offer, marketing was thought to be most important

Of all the priorities for improving the visitor offering, marketing stood out as the most important to businesses.

85% of both the total businesses and the core tourism businesses said that 'marketing the visitor offer' was 'very important', 14% said that it was 'quite important' and 1% said 'neither/nor'. None of the businesses felt it wasn't important.

Marketing the visitor offer (%)



Q15. On a scale of 1 to 5 where 1 = not at all important and 5 = very important, how important do you consider the following for the Moray Speyside visitor offer?

a. Marketing the visitor offer b. More events and festivals c. Extending the holiday season d. Improved visitor signage in the area e. Improved access to Moray Speyside e.g. bus, train etc... f. Improved transport within Moray Speyside e.g. local connections

© 2018 STR. All Rights Reserved.

Importance of marketing was reiterated in verbatim comments



Businesses were spontaneously asked what the short and medium term priorities were for a Moray Speyside TBID, and the answer was commonly about marketing the area and the visitor offering. It was felt that a consolidation of sectors and a single tourism offering would be a good place to start, which could then be marketed to increase exposure. Ideas for exposure included listing the area on the Visit Scotland website, having group events with all tourism sectors and developing a better website. Businesses suggested networking events to organise such things.

Additional priorities included gaining more knowledge about the visitors to the area, improving transport infrastructure, improving the accommodation offering and making Moray Speyside a year-round destination.

"Getting really great websites up with comprehensive, reliable and up to date on line information for the area. Coming up with initiatives for making Moray really stand out as an all-season destination of exceptional quality."

"Enhancing and improving visitor information about Moray Speyside - through websites, social and other forms of media."

"Improving the tourist experience with mapping of attractions, accommodation etc. Publicising the diversity of Moray - Scotland in miniature."

"Exploring ways to make tourism less seasonal, e.g. by promoting Moray as an "add-on" destination to the more popular parts of Scotland alternative or a gateway to the Highlands, NC500 etc., enhancing the image and exposure of Moray Speyside to the world's tourists."

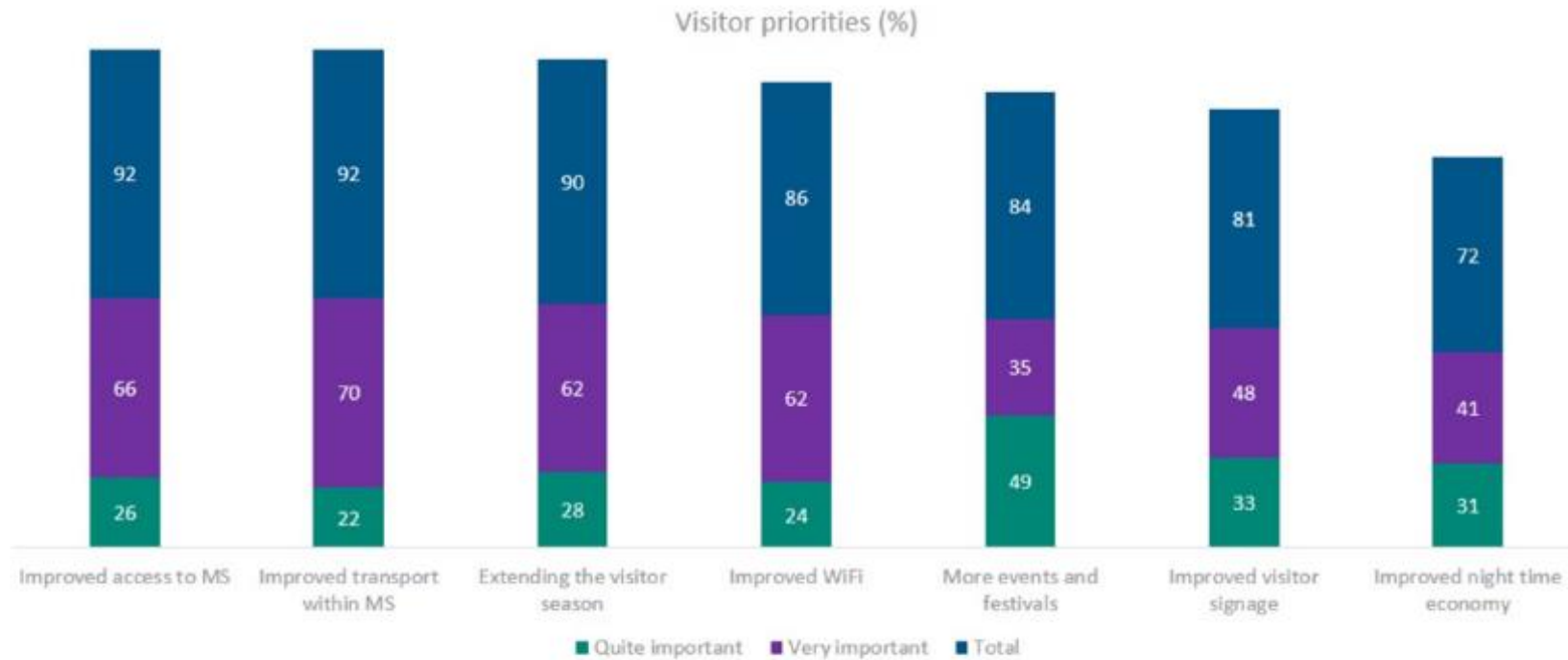
"Consolidating the offer of the area as one tourism sector rather than various parts and ensuring that, where funding is available from Government bodies, that it is controlled by those within the tourism sector in Moray rather than those out with the area."



Q14. Thinking about a Moray Speyside T-BID what would you recommend as its main priorities in the short to medium term?

© 2018 STR. All Rights Reserved.

The remaining visitor priorities were all also thought to be important



Q15. On a scale of 1 to 5 where 1 = not at all important and 5 = very important, how important do you consider the following for the Moray Speyside visitor offer?
 a. Marketing the visitor offer b. More events and festivals c. Extending the holiday season d. Improved visitor signage in the area e. Improved access to Moray Speyside e.g. bus, train etc... f. Improved transport within Moray Speyside e.g. local connections

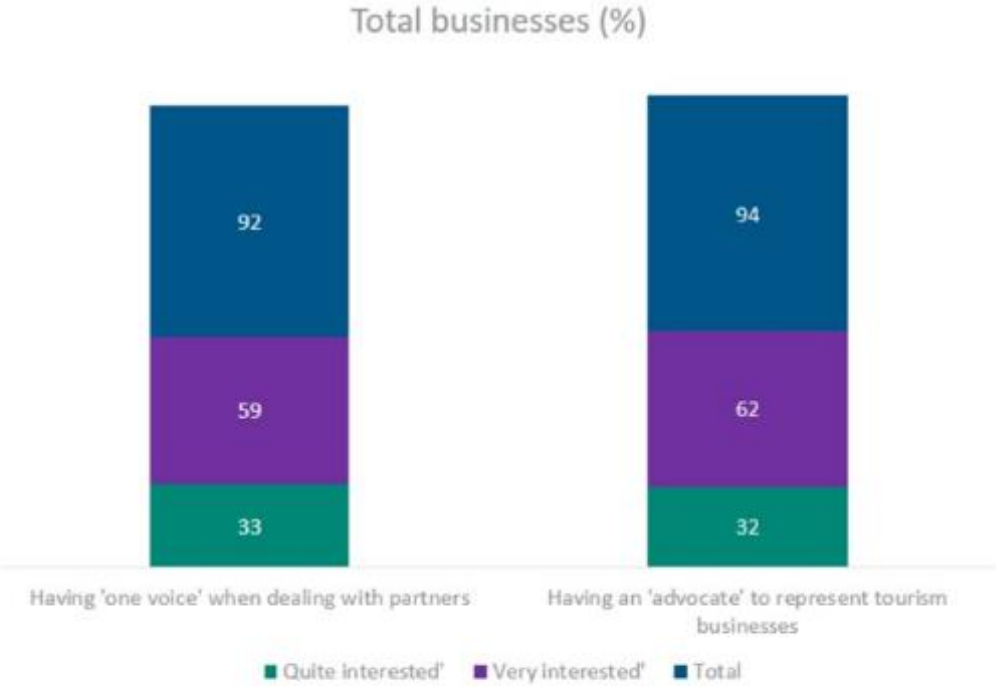
© 2018 STR. All Rights Reserved.

Of the business priorities listed, having 'one voice' and having an 'advocate' came out as most important



Of the business priorities listed, businesses felt that having 'one voice' when dealing with partners e.g. local and national government and having 'an advocate' to represent tourism businesses were most important. The biggest proportion said that they thought these were 'very important', at 59% and 62% respectively.

These results were broadly the same for core tourism businesses, with 57% saying that having 'one voice' was 'very important' and 59% saying that 'having an advocate' was 'very important'.



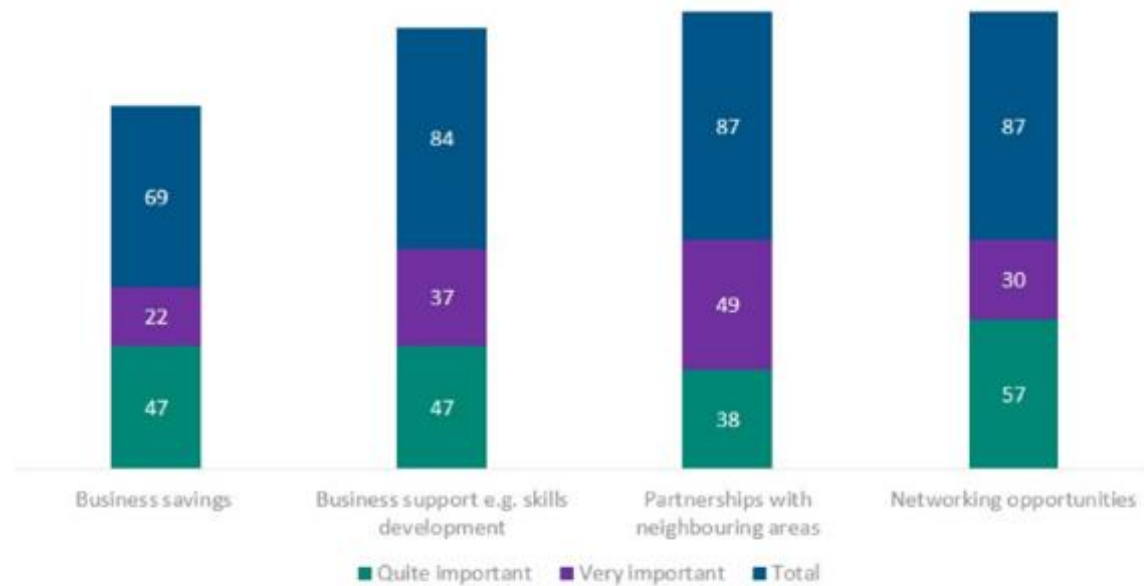
Q15. On a scale of 1 to 5 where 1 = not at all important and 5 = very important, how important do you consider the following for the Moray Speyside visitor offer?
 a. Marketing the visitor offer b. More events and festivals c. Extending the holiday season d. Improved visitor signage in the area e. Improved access to Moray Speyside e.g. bus, train etc... f. Improved transport within Moray Speyside e.g. local connections



Other priorities were also important to businesses

Of the other business priorities, business support, partnerships with neighbouring areas and networking opportunities were all also seen as very important. While still important, business savings were deemed less critical than the others.

There was no significant difference between the total businesses and the core tourism businesses.



Q15. On a scale of 1 to 5 where 1 = not at all important and 5 = very important, how important do you consider the following for the Moray Speyside visitor offer?

a. Marketing the visitor offer b. More events and festivals c. Extending the holiday season d. Improved visitor signage in the area e. Improved access to Moray Speyside e.g. bus, train etc... f. Improved transport within Moray Speyside e.g. local connections

© 2018 STR. All Rights Reserved.

Summary



- The idea of a TBID was well received by businesses
- There was a strong interest among businesses in becoming members and making a financial contribution
- The majority were willing to pay over £100 for this membership
- Many businesses expressed an interest in influencing priorities and spending for a TBID
- The main priority for a TBID in relation to the visitor offering was thought to be marketing the visitor offer; both when asked unprompted and with a prompted list
- Improving transport to and within Moray Speyside, extending the visitor season, improving WiFi, having more events and festivals and signage were also viewed as important priorities for improving the visitor offering
- The main businesses priorities for a TBID were having one collective voice and having an advocate
- Additionally getting business support, partnerships with neighbouring areas and networking opportunities were also important business priorities