

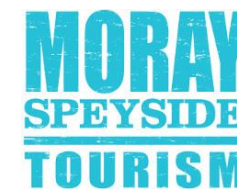


## Moray Speyside

STEAM Tourism Economic Impacts

2017 Report

Narrative Summary



### Moray Speyside's Visitor Economy 2017

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

**806,190 Tourism Visits** to Moray in 2017, up 7.4% on the previous year

**485.390 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 **2017**

**£129 million** was generated within the local economy through visitor and tourism business expenditure

**320,800 visits** made by **Day Visitors** to Moray in 2017



**Day Visits** generated **£16.5 million** for the economy of the area in 2017

On average, visitors **staying in Moray** stay **3.2 nights** and spend **£30.4 million** on local accommodation

Visitors to Moray are vital to local businesses, supporting more than **2,846 full time equivalent jobs**



**Staying visitors** generate a **total economic impact of £112 million** for businesses in Moray



**Economic Impact increased by 31.9%** between 2011 and 2017

**Staying visitor numbers increased by 27.3%** between 2011 and 2017

**Total Day Visitors increased by 29.3%** between 2011 and 2017

2009  
2017

## 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

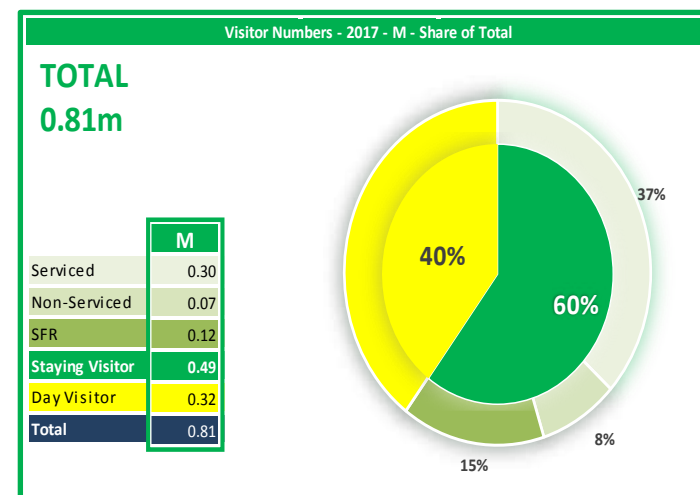
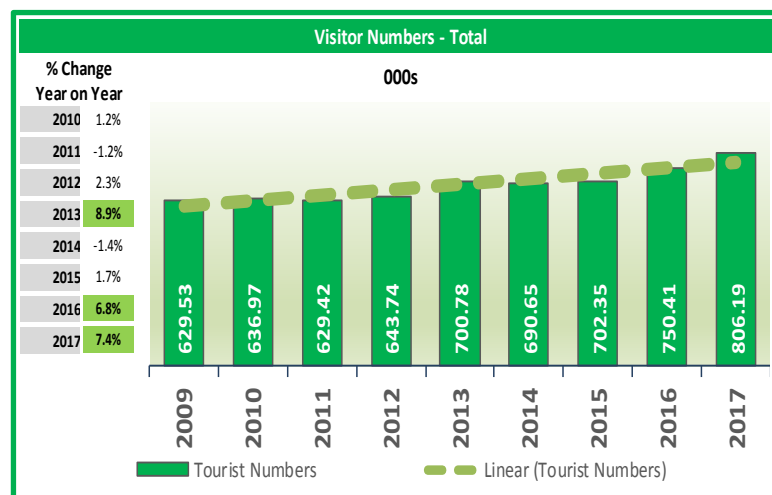
Total  
Visitor  
Numbers  
0.81m

## Visitor Numbers

In 2017, there were an estimated 806,190 tourism visits to Moray; representing an increase of 7.4% on the previous year. Overall, 60% of visitors (485,390) stayed in the area for one or more nights, the remaining 40% of visitors (320,800) were Day Visitors to Moray. Within the staying visitor sector, the majority stayed in serviced accommodation (37%), a slight increase on the previous year.

Visitor numbers to Moray have steadily

increased since 2009 by 28.1%, especially in the second quarter. The greatest increase during this period in visitor numbers has been within the serviced sector, which has grown by 50.7%, representing an annual average increase of 6.3%. Day visitors have also increased during the past eight years by 27.4%.



## Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	000s	296.43	67.18	121.78	485.39	320.80	806.19
2016	000s	257.23	67.11	118.59	442.93	307.48	750.41
Change 16/17	%	15.2	0.1	2.7	9.6	4.3	7.4

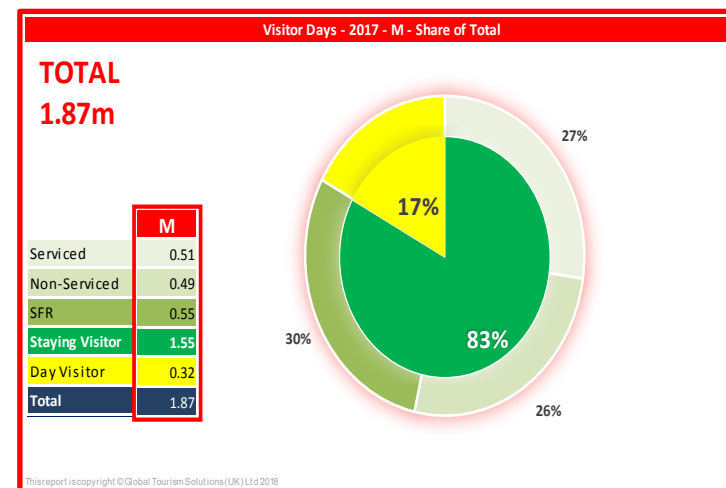
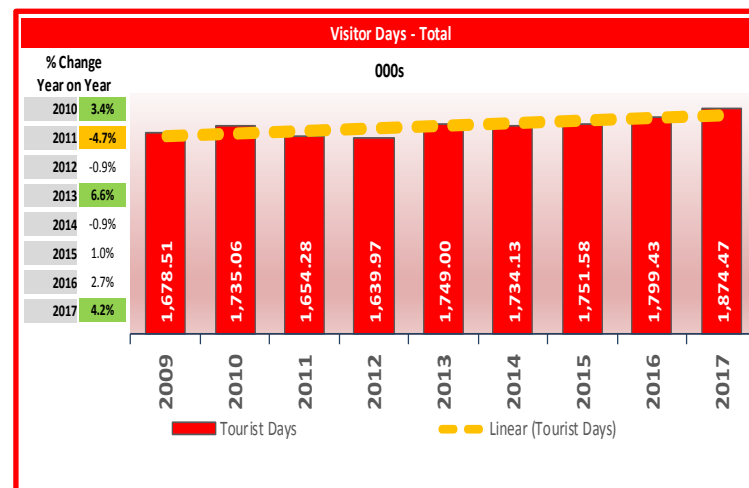
**Total  
Visitor  
Days**  
**1.87m**

## 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 1.87m days in the area as part of a tourism day trip, holiday or short break in 2017; total visitor days were up 4.2%.**

Staying visitors represent 83% of all visitor

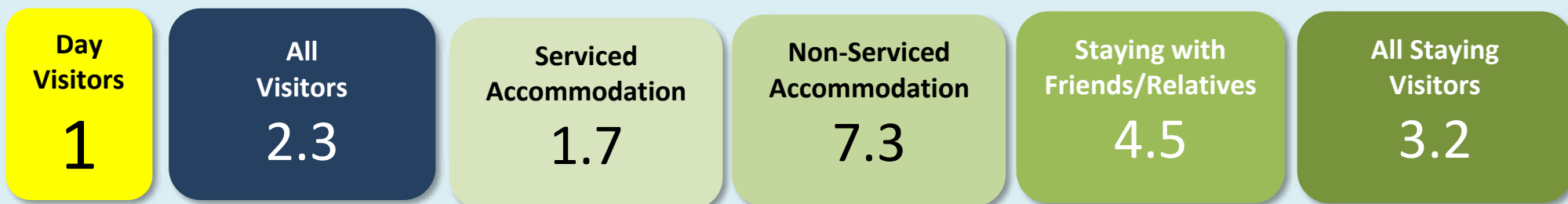
days, unchanged from 2016. **Day visitors continue to be increasingly important to Moray, increasing by 27.4% since 2009.** The average length of stay for all visitors is 2.3 days; for non-serviced this rises to 7.3, indicating a very high proportion of weekly rentals.



## Key Figures: Visitor Days

Visitor Days		Served	Non-Served	SFR	Staying Visitors	Day Visitors	All Visitors
2017	000s	511.62	490.98	551.08	1,553.67	320.80	1,874.47
2016	000s	454.12	498.63	539.19	1,491.95	307.48	1,799.43
Change 16/17	%	12.7	-1.5	2.2	4.1	4.3	4.2

## Average length of stay in days for different visitor types to Moray in 2017



**Total  
Economic  
Impact  
£128.88m**

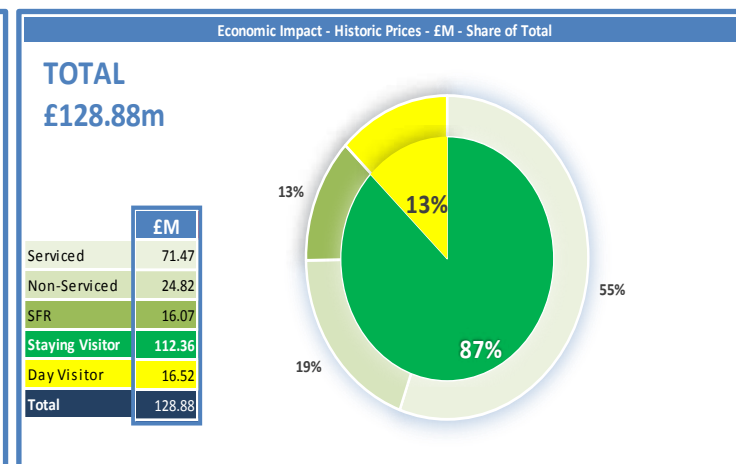
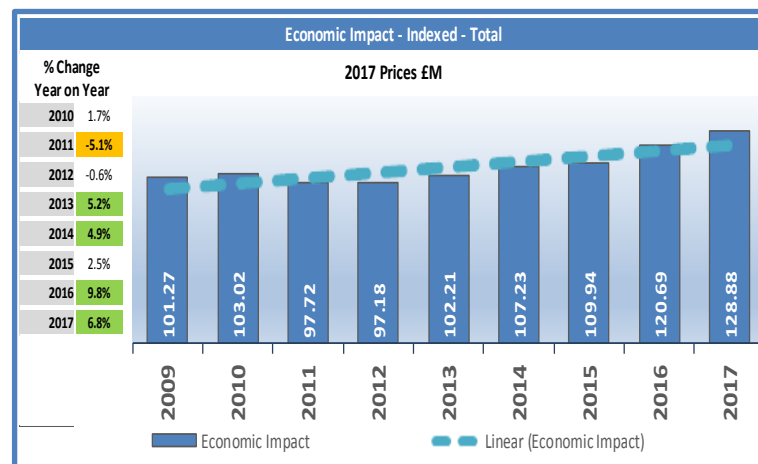
## Economic Impact

Tourism visits to Moray in 2017 generated a total economic impact of £128.88m, an increase of 9.6% on 2016, and also a substantial increase of 27.3% since 2009 (all monetary figures in this narrative report are indexed to allow direct comparison). The total economic impact in 2017 comprised the expenditure of visitors on goods and services, totalling £98.78m, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism revenues locally, accounting for a further £30.10m.

The greatest economic impact over the

past year again took place within the serviced sector, which increased by 13.6% (and steadily by 51.1% since 2009). Day visitors also increased by 6.3% from 2016.

The average spend per visitor per day to Moray has risen to £68.76; per non-serviced accommodation visit to £369.03 and per serviced accommodation visit to £139.69 per day, and £237.48 per visit.



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

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017	£m	71.47	24.82	16.07	112.36	16.52	128.88
2016	£m	62.92	23.93	15.25	102.09	15.55	117.64
Change 16/17	%	13.6	3.7	5.4	10.1	6.3	9.6

### Average economic impact generated per person by each type of visitor to Moray in 2017

<b>Day Visitors</b> <b>£51.50 per Day</b>	<b>Staying with Friends and Relatives</b> <b>£29.16 per Day</b> <b>£131.22 per Visit</b>	<b>All Visitors</b> <b>£68.76 per Day</b> <b>£158.14 per Visit</b>	<b>Non-Serviced Accommodation</b> <b>£50.55 per Day</b> <b>£369.03 per Visit</b>	<b>All Staying Visitors</b> <b>£ 72.32 per Day</b> <b>£231.42 per Visit</b>	<b>Serviced Accommodation</b> <b>£139.69 per Day</b> <b>£237.48 per Visit</b>
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**Total  
FTEs  
Supported  
in 2017  
2,846**

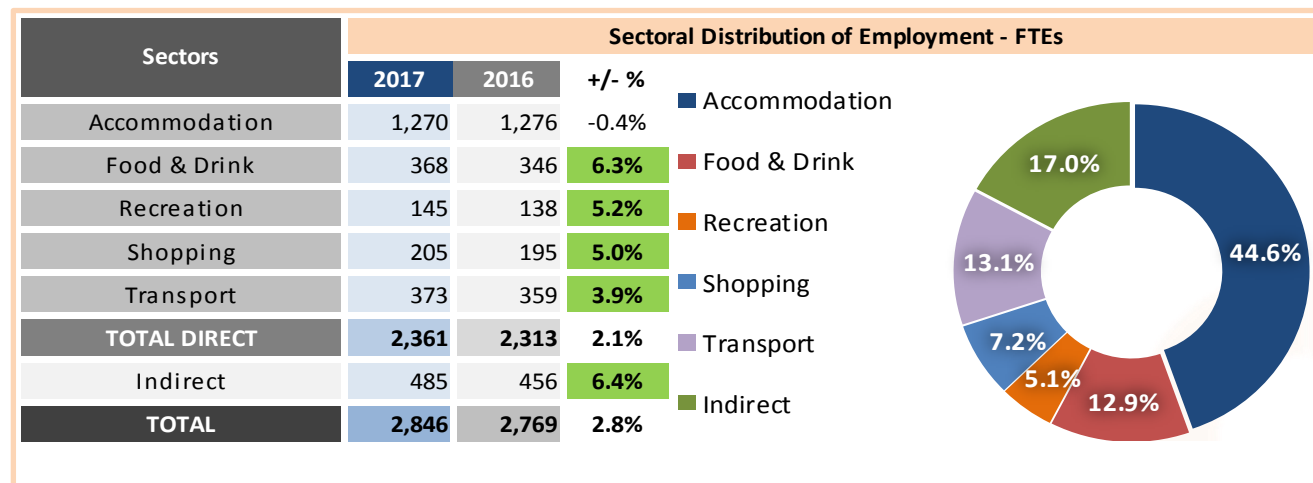
## Definitions:

- **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 2017 supported a total of 2,846 Full-Time Equivalent jobs (FTEs). Employment has remained relatively stable over past years but has increased substantially since 2015 by 12.6%. Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 2,361 FTEs in 2017, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 485 FTEs. The largest sectors for direct employment were Accommodation (1,270 FTEs); followed by Transport (373 FTEs); Food & Drink (368 FTEs) and then Shopping (205 FTEs).

## Employment Supported by Tourism 2016-2017: Full-Time Equivalents (FTEs) by Type



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