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**REPORT TO: ECONOMIC DEVELOPMENT AND INFRASTRUCTURE SERVICES COMMITTEE ON 17 JUNE 2008**

**SUBJECT: TOURISM STATISTICS FOR MORAY**

**BY: DIRECTOR OF ENVIRONMENTAL SERVICES**

**1. REASON FOR REPORT**

- 1.1 The Committee is invited to agree co-funding the gathering of tourism statistics in Moray over a two-year period.
- 1.2 This report is submitted to Committee in terms of Section D(9) of the Council's Administrative Scheme relating to the provision of assistance to industry.

**2. RECOMMENDATION**

- 2.1 **It is recommended that the Committee agree to approve a contribution of £13,000 to co-fund the gathering of tourism statistics in Moray over a two year period.**

**3. BACKGROUND**

- 3.1 The collection of statistics provides vital information about visitors to Moray, and gives strong indication of how well the industry is doing. It is also a tool to evaluate the impact of any investment. Currently, there are no reliable and representative statistics at Moray level.
- 3.2 VisitScotland has commissioned TNS Travel and Tourism to provide occupancy figures. The statistics are collected monthly for the following sectors:

Touring Caravan and Camping Park  
Hotels  
Bed and Breakfast and Guest Houses  
Self catering  
Bunkhouse and Bothy

The information provided is broken down by VisitScotland regional office area and by Enterprise Company area. However change to HIE boundary from Moray Badenoch and Strathspey Enterprise to HIE Moray's boundary has not been made and, as a result, the information is provided for Moray and Badenoch and Strathspey.

- 3.3 Glasgow Caledonian University collects statistical information on visitor attractions, which are broken down by category and also available by VisitScotland regional office area.
- 3.4 The Scottish Tourism Economic Activity Monitor (STEAM) is also used in certain area. It has been used for the Grampian area, providing information broken down by Local Authority area. However STEAM is not designed to provide a precise and accurate measurement of Tourism in a local area, but rather provide an indicative base for monitoring trends.
- 3.5 It is proposed to collect local statistical information initially over a two-year period.

The following information will be collected:

- Occupancy rate
- Number of business visitors
- Number of leisure visitors
- Visitor origin
- Reason for trip for leisure visitors e.g. golf, fishing
- Length of stay
- Age group
- Mode of transport

The information will be collected on a monthly basis and a quarterly analysis will be provided. The data will also be broken down per area: Elgin, Forres, Buckie, Keith and Speyside. In addition, tourism businesses will be invited to provide anecdotal information such as their views on business activity in the short and medium term, difficulties they are experiencing, for example staff shortages.

- 3.6 The data will also be broken per main sector:

- Bed and Breakfast and Guest Houses
- Hotel
- Self Catering
- Camping Park

In order to produce reliable statistical information it is essential to have a robust and reliable sample group, providing the information consistently. For this reason, it is proposed that each business in the sample group is met individually, to ensure they have the appropriate resource in place to collect and provide the data on time.

To reward those businesses returning the data, it is proposed to operate a quarterly prize draw. The prize will be either a software programme, which will assist businesses to collect and use information about their customers, or additional marketing support to a maximum value of £300.

#### 4. SUMMARY OF IMPLICATIONS

(a) **Corporate Development Plan/Community Plan/Service Improvement Plan**

This report complies with the Council's priority under the Corporate Development Plan's Environmental Programme of supporting the development of tourism.

(b) **Policy and Legal**

This report is in line with the national and regional strategies in supporting evidence of growth.

(c) **Resources (Financial, Risks, Staffing and Property)**

The total cost:

**Start up costs**

Design and sample group recruitment	£ 5,000
Quarterly analysing and reporting over two years	£16,000
8 Quarterly prize	£ 2,000

<b>Total</b>	<b><u>£23,000</u></b>
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**To be funded**

Moray Council	£13,000
HIE	£10,000

<b>Total</b>	<b><u>£23,000</u></b>
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It is proposed to use £5,000 from the 2008/09 Economic Development budget and the remaining £8,000 from the 2009/10 Economic Development budget. A sum of £5,000 from the 2007/08 Tourism Action Plan budget was allocated to this activity and a request to carry that sum forward has been made. Should it be approved it will reduce the contribution from the 2008/09 budget.



(d) **Consultations**

- The Principal Accountant has been consulted and comments have been incorporated.
- The Moray Tourism Steering has been made aware of the proposal and is in support of the recommendation.
- The VisitScotland Highland area office Director, who agrees the need for local statistic and supports the proposal.

5. CONCLUSION

- 5.1 It is widely accepted that the current tourism statistics are not an accurate measurement of tourism at local level. The proposal will cure the lack of available data, and will be used to measure industry performance, and the impact of public sector investment as well as guiding future marketing. The Committee is asked to consider the recommendations set out in Section 2.

Author of Report: Pierre Masson, Development Officer  
Background Papers:  
Ref: PM/KT

Signature:  Date : 

Designation: Director of Environmental Services Name: Robert A Stewart