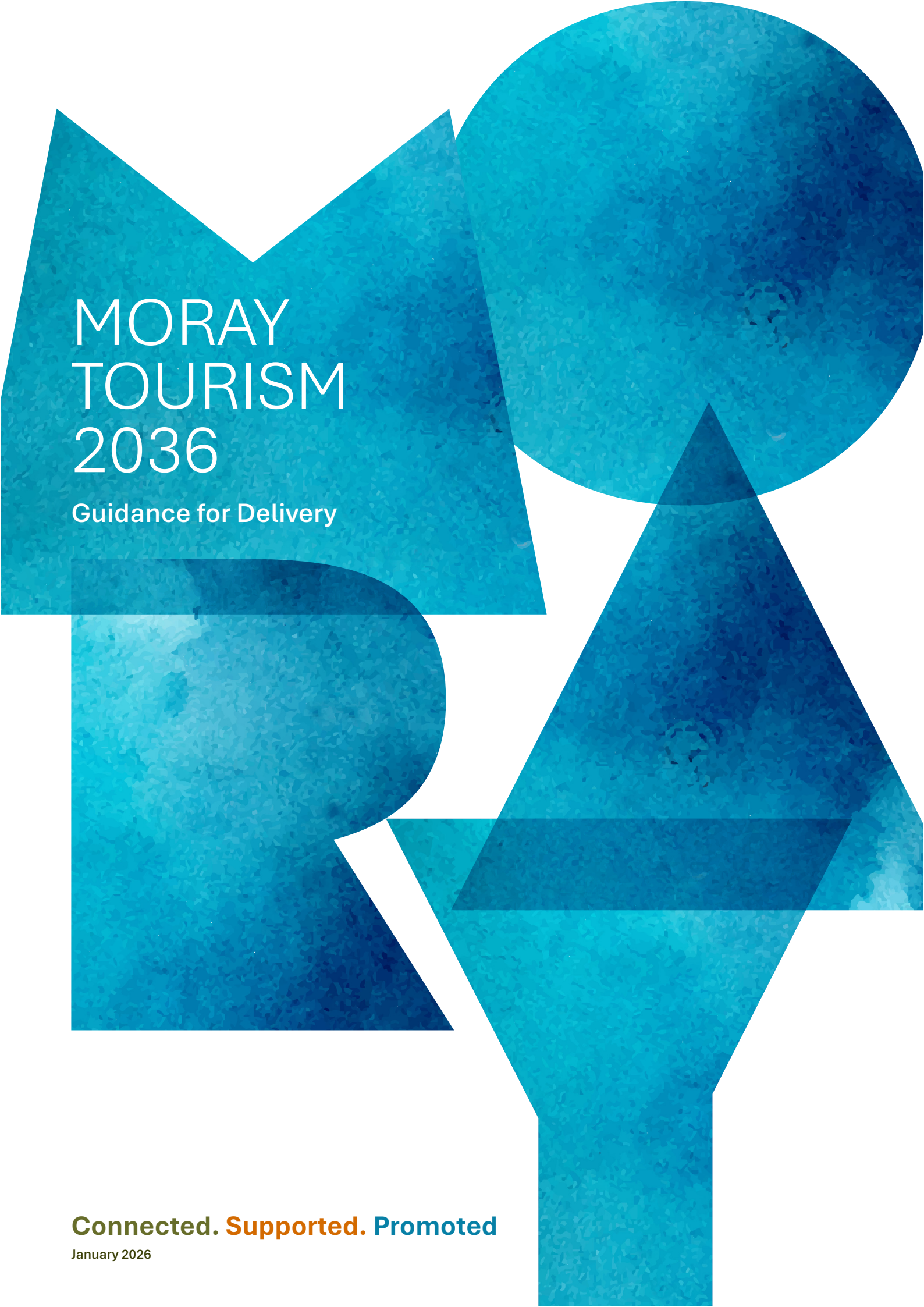


The background of the cover features several large, overlapping geometric shapes in various shades of blue. These include a large circle in the top right, a large triangle on the left, a large inverted triangle on the right, and a large rounded rectangle in the bottom left. The shapes are layered, creating a sense of depth and movement.

MORAY TOURISM 2036

Guidance for Delivery

Connected. Supported. Promoted

January 2026

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MORAY TOURISM 2036 – A 10 YEAR TOURISM STRATEGY

This document forms the fourth in a portfolio of four strategic documents.

1. Moray Tourism 2036 - The 10 Year Strategy
2. Moray Tourism 2036 - How We Got Here
3. Moray Tourism 2036 - The 10 Year Strategy Explained
- 4. Moray Tourism 2036 - Guidance for Delivery**

‘Guidance for Delivery’ sets out the various recommended actions that should take place to deliver the intent set out in the main strategy and is structured under the six pillars for action.

A glossary is provided in document 3.

This strategy has been developed and produced by SCOTO CIC based on our Press Pause® methodology. Our thanks to all who engaged in the process and freely shared their passion and insights ensuring this strategy directly responds to their local lived experience and ambition.

OUR STRATEGIC FRAMEWORK

This strategy is tackling the what and the how of destination development, management and promotion in Moray – what could and should happen over the next 10 years, and more importantly how this will be achieved. It is built on local insight, respects local capacity and capability. The strategy therefore focusses specific energy on leadership, partnerships and governance at the outset to allow the wider ambition of this strategy to become reality.

The six guiding principles have defined the six strategic pillars for this strategy and implementation is guided by eight delivery frameworks.

OUR STRATEGIC FRAMEWORK 2026-36

OUR GUIDING PRINCIPLES

Principles	A JOINED-UP PLACE LED PROPOSITION	A RENEWED PLACE NARRATIVE	A CONFIDENT FOUNDATION FOR ENTERPRISE AND PROSPERITY	A WELLBEING ECONOMY LENS	COMMUNITIES AS PARTNERS NOT SPECTATORS	STEWARDSHIP FIRST
What matters	Connecting Moray's hidden assets with its global brands/ linking place and people as one coherent destination	Rooted in Moray's landscape, people, culture, creativity and contrasts	Creating an environment for enterprise to invest and grow with clarity and confidence	Tourism as a driver of local pride, resilience, and fair work balancing people, places and profit	Recognising local organisations, charities, social enterprises and volunteers as essential contributors	Tourism that strengthens everyday life, protects Moray's landscapes and delivers long-term value for communities, businesses and visitors
Our approach	A collegiate, agile and transparent destination management model that represents businesses, communities, global brands and volunteer groups	A strong, place-rooted cohesive story guides how Moray presents itself and how businesses and communities collaborate translating into authentic memorable experiences	Tourism empowers businesses and communities to invest with confidence, supporting fair work, skills and resilient workforce	Tourism growth should be supported by the essential infrastructure that serves both residents and visitors	Visitors feel connected through authentic, place-based experiences developed collaboratively and delivered by proud local people	Growth is paced to local capacity, with investment in infrastructure, environment and visitor management coming before promotion

OUR PILLARS FOR ACTION

Our priorities	Destination Leadership & Coordination	Identity, Brand & Promotion	Enterprise & Investment	Community Benefit & Resilience	Visitors Experience & Dispersal	Environment & Infrastructure
	A light-touch, inclusive, enabling model that reconnects and drives Moray	A compelling narrative that ties Moray's places and assets together to inspire responsible visits that resonate & connect	An inspirational framework to support Moray's enterprises, people and places to grow with confidence and purpose	Meaningful connections between visitors, communities & enterprise empowering Moray's people & places to flourish	Shaping Moray's visitor offer to support responsible growth, dispersal and year-round value	Strategic investment that enables connectivity and protects place and the planet

OUR DELIVERY FRAMEWORKS

What we will do	DESTINATION LEADERSHIP IN MORAY 5 Delivery Charters DESTINATION COLLABORATION & EARLY ACTIONS IN MORAY	MORAY'S IDENTITY BRAND AND PROMOTION	ENTERPRISE AND INVESTMENT IN MORAY	COMMUNITY BENEFIT AND RESILIENCE ACROSS MORAY	MORAY'S PRODUCT AND EXPERIENCE CLUSTERS	INFRASTRUCTURE INVESTMENT IN MORAY CLIMATE, NATURE STEWARDSHIP IN MORAY
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Eight delivery frameworks have been developed to support the implementation of the Moray Tourism Strategy 2026-2036. The first and most crucial one relates to Leadership and Coordination, and with the absence of a Destination Organisation needs immediate attention to enable everything else to fall into place.

GUIDANCE FOR DELIVERY: EIGHT DELIVERY FRAMEWORKS

1 – DESTINATION LEADERSHIP IN MORAY

a) LEADERSHIP, STRATEGIC PARTNERSHIPS & GOVERNANCE

PURPOSE: Creating a connected, confident and collaborative model for destination development, management and promotion.

The clearest message from engagement was the need for **leadership and coordination**. 88% of survey respondents highlighted the importance of a destination body but not a return to the previous BID model. Stakeholders called for a model that is lean, inclusive, transparent and grounded in community and business voices.

Interim Tourism Leadership Group (TLG)

An Interim Tourism Leadership Group (TLG) is proposed as a transition structure to stabilise, coordinate and co-design Moray's long-term destination model.

To support this, it is proposed that a **Moray Strategic Tourism Partnership** is formally recognised, reflecting partnership-led models used successfully elsewhere in Scotland, involving the key agency partners: Moray Council, VisitScotland, Business Gateway, Highlands and Islands Enterprise, Moray Chamber of Commerce, Federation of Small Business and other key public and enterprise partners.

The Strategic Tourism Partnership will play a key enabling role in supporting the establishment of the TLG, ensuring alignment with national and regional priorities while allowing local leadership to emerge.

A TLG - Principles for Governance

The destination leadership model must be:

1. Light, Enabling and Transparent

Small core team; minimal bureaucracy; accountable to partners.

2. Community-Inclusive

Formal representation of community organisations, volunteers and cultural groups alongside business and enterprise.

3. Cross-Sector

Whisky, outdoor activities, food & drink, events, accommodation, heritage, culture.

4. Place-Led

Representation across towns and wards; no geographic silos.

5. Focused on Delivery

Digital, data, communication, coordination and collaboration.

6. Supported by Moray Council, Not Owned by It

Moray Council plays an enabling role, not a controlling one.

MORAY Interim Tourism Leadership Group (Years 1–2)

A two-year transition structure designed to stabilise the system, rebuild confidence and co-design the permanent destination model.

A Tourism Leadership Group is recommended, supported by a small destination development team to enable delivery:

- Marketing and Digital – operating digital channels and coordinating interim marketing activity
- Destination Development – championing product development and coordinating delivery of this strategy
- Support and Administration – providing secretariat support to the TLG and wider networks

These roles may be employed or freelance. Given the interim nature of the TLG, governance and contracting arrangements should be hosted by an established partner organisation, where appropriate.

Delivery will require secure funding. Support from Moray Council will be important, alongside exploration of available grants and other appropriate funding mechanisms.

The TLG will act as the primary governance mechanism during the first two years while the permanent destination model is developed.

Role of the TLG

- Steward the Moray Tourism Strategy 2036.
- Oversee digital relaunch and communication improvements.
- Lead on Moray-wide marketing activity.
- Convene sector forums and place networks.
- Coordinate the prioritisation of infrastructure issues impacting visitors & communities
- Develop the long-term governance and funding model.
- Ensure community voice and stewardship are central to decision making.

Membership

A core group of 3-5 individuals is recommended to form the TLG and with representatives from sector and place forums:

This creates the **lean, “one-table” delivery model** consistently requested through engagement.

Sector & Place Forums (Ongoing)

Five standing forums (suggested) to feed into the TLG:

1. **Events & Festivals Forum**
2. **Culture, Heritage & Creative Industries Forum**
3. **Outdoor, Land & Nature Forum**
4. **Activities & Experience Forum**
5. **Communities Forum**

The Strategic Tourism Partnership will provide the forum with **Policy, Infrastructure & Public Services**

Each forum provides insight, identifies issues early, avoids silo working, and ensures that all voices are represented.

Permanent Destination Model (From Year 2)

Designed during the transition period, implemented for the long term.

The permanent model will be finalised through a co-design process, but is expected to embody:

a. A Lean Core Team (indicatively 4 roles)

Likely roles include:

- Destination Manager / Coordinator
- Digital & Content Lead
- Community & Experience Support Officer(s)
- Administrative / Partnership Support

This team handles operations, not governance.

b. A Partnership Governance Board

Evolving from the TLG, with:

- Elected chair/vice-chair
- Formal community and cultural sector seats
- Business and industry representation
- Routes for youth and volunteer voices
- Strategic Tourism Partnership providing an ongoing advisory role

c. Sustainable Funding Options

To be explored:

- Potential Local Authority contributions
- External grants: UKSPF (or similar) and other national programmes
- Business contributions (non-compulsory, value-based)
- Visitor giving/donation mechanisms
- Payment/donation schemes for public toilets and other facilities
- Event partnership funding
- Potential ring-fenced portion of any future Visitor Levy

Roles & Responsibilities Across the System

Destination Leadership (TLG / Permanent Body)

- Digital presence
- Visitor information
- Collaboration
- Marketing alignment
- Data & insight
- Sector convening
- Visitor management coordination

Moray Council

- Infrastructure planning and delivery
- Transport, signage, public realm
- Policy alignment (LDP, Moray Growth Deal)
- Enabling resource
- Supportive rather than directive role

Communities

- Shaping priorities
- Interpretation, trails, community experiences
- Volunteer networks

Businesses

- Experience development
- Fair work
- Local supply chain use
- Visitor care

Agencies - Strategic Tourism Partnership

- Policy alignment, funding and investment support, research & training

What This Means for the Next 10 Years

By moving through a structured 2-year transition into a permanent governance model, Moray will gain:

- Stability after a period of fragmentation
- Stronger reputation and visibility
- A joined-up system for collaboration
- Better use of limited resources
- Clear communication channels for all stakeholders
- A fair and transparent approach to funding
- A long-term model aligned with national policy and community expectations

By 2036, Moray will have a leadership structure that reflects its values:

collaborative, community-rooted, practical, inclusive and resilient.

b) PHASED IMPLEMENTATION (2026–2036)

A phased approach that builds confidence, capacity and momentum.

The next decade requires structured delivery that recognises Moray's current capacity and capability, secures early impact and allows space for evolution.

FIRST STEPS

Given the current void created by the closure of Visit Moray Speyside (VMS) following the unsuccessful renewal ballot for the Tourism BID in March 2025, momentum needs to be established in early course. Funding does remain with the original VMS limited company which can only be used for tourism related purpose and therefore could provide the basis to kick starting this new strategy and sense of purpose in Moray. It could also be supplemented through partnership contributions and project funding.

Three simple first steps will kickstart the delivery of this strategy:

1. Establish the tourism leadership group and strategic tourism partnership
2. Assume management of the existing website and digital channels and develop a digital marketing plan
3. Appoint a contractor/freelance team providing
 - a coordinator to support the TLG in its deliberations and actions, engage the industry and provide basic admin support
 - a digital marketer to develop and manage the digital assets and digital content
 - a destination development manager to progress the collaborative initiatives and product development

Various logistics need considered, including ownership of the website, banking, and reporting lines for the freelance team which could readily be championed by one of the strategic partners as the new Destination Organisation is established.

PHASE 1 (2026–2028): Stabilisation & Foundations

Focus: coordination, infrastructure, narrative, early wins.

Key Milestones

- Establish Moray Interim Tourism Leadership Group and Moray Strategic Tourism Partnership
- Relaunch destination website and “What’s on Moray – event calendar”
- Develop themed collaborative initiatives linked to established festivals and products
- Create viable sector/place forums
- Re-establish an Annual Tourism Conference
- Audit and prioritise infrastructure
- Deliver early signage/toilet/parking upgrades
- Produce town story maps
- Source funding and launch Tourism Enablers Fund
- Pilot bookable experiences (5-10)
- Agree long-term governance model design
- Initiate ranger/visitor management partnerships
- Publish first Moray Tourism Dashboard

PHASE 2 (2028–2031): Integration & Growth

Focus: product development, experience depth, collaboration.

Key Milestones

- Moray Themed Trails network rollout

- Full wayfinding and signage programme
- Food & Agritourism Trail development
- Whisky Villages experience
- Maker & Craft Route
- Coastal management improvements
- Improved transport integration
- Accessible trail developments
- Expansion of bookable experiences
- Enhanced heritage interpretation
- Cultural Quarter activation

PHASE 3 (2031–2036): Leadership & Maturity

Focus: national leadership, premium experiences, regenerative tourism.

Key Milestones

- Launch premium story-rich experiences
- National recognition as a model of community-powered tourism
- Fully operational permanent destination body
- Mature data and insight ecosystem
- Long-term accommodation strategy implemented
- Enhanced regeneration of coastal and inland town centres
- Ongoing environmental monitoring and climate action
- Year-round events spine established
- Mature visitor donation scheme
- Integrated sustainable transport plan delivered

c) MEASUREMENT

Tracking what matters — and demonstrating value to communities.

Communities asked for evidence of benefit, not just footfall and promotional activity. This dashboard focuses on **place-based, meaningful outcomes**.

KEY PERFORMANCE INDICATORS

A VISITOR EXPERIENCE & SATISFACTION	visitor satisfaction digital engagement itinerary usage repeat visitation shoulder-season occupancy
B BUSINESS HEALTH	business barometer revenue stability across seasons workforce retention and living wage employers local supply chain usage number of bookable experiences
C COMMUNITY BENEFIT	number of community projects funded volunteer hours supported improvements to toilets, signage, trails community satisfaction metrics youth participation numbers

D ENVIRONMENT & STEWARDSHIP	ranger reports waste reduction EV charging use active travel metrics biodiversity engagement initiatives
E COLLABORATION & COORDINATION	TLG meeting frequency forum participation annual conference engagement cross-sector collaboration outcomes response times for issues raised

Moray Tourism Dashboard

Updated quarterly; publicly visible; used for decision-making.

The dashboard will:

- guide funding decisions
- inform Moray Council planning
- build transparency and trust
- celebrate success stories
- show progress towards community benefit

d) RESOURCING

A fair, transparent and sustainable funding approach.

Engagement showed strong concern about any funding model that burdens small businesses or communities without clear benefit. This section outlines a **balanced, multi-source funding approach**.

Principles

- transparency
- fairness
- community benefit
- shared responsibility
- reinvestment locally
- supporting volunteers
- no barriers to participation

Core Funding Sources (Blended Model)

1. Public Sector Funding

Supports: coordination, infrastructure, signage, events, trails, digital.

2. External Grant / Programme Funding

Examples: National Lottery Heritage Fund, Creative Scotland, Moray Growth Deal, Event Scotland, Crown Estate, HIE programmes.

3. Partnership Contributions (Voluntary / Value-Based)

Businesses contribute through: joint marketing, experience development, supply chain collaboration, skills programmes, not compulsory levies.

4. Visitor Giving / Donation Schemes

Light-touch contributions supporting: trails, toilets, community projects, coastal management

5. Event Partnerships

Ticketed events supporting local infrastructure and community funds.

6. Potential Future Visitor Levy (if introduced)

Stakeholders stressed: ring-fencing, transparency, local reinvestment, fair design and no disproportionate impact on accommodation providers or residents

10-Year Funding Roadmap

Years 1–2: public sector + external grants

Years 3–6: blended model with visitor giving + partnerships

Years 7–10: mature model aligned with permanent governance structure

e) MONITORING & REVIEW

A living strategy guided by real data and real voices.

This strategy must remain flexible and adaptive, evolving with communities, markets and environmental pressures.

Annual Review Process

Conducted jointly by:

- Tourism Leadership Group
- Moray Council
- VisitScotland
- Sector and Place Forums

Data:

- A quarterly Moray Tourism Barometer
- Agreed network of Barometer Businesses
- STEAM data trend analysis with indexing
- VS Visitor survey and other data
- Association of Scottish Visitor Attraction (ASVA) Visitor attraction data

Focus:

- KPI analysis
- community benefit assessment
- environmental performance
- workforce and business health
- progress on infrastructure pipeline

3-Year Strategy Refresh

Every three years:

- review emerging trends
- revisit community-based Press Pause® destination competency appraisals

- highlight new/emerging challenges
- integrate new opportunities
- update priorities
- adjust roadmap
- confirm governance readiness

Continuous Community Engagement

- annual community tourism/towns and villages forum
- rotating town hosts
- youth involvement through UHI/DYW
- transparent publication of outcomes

Communication Commitments

- quarterly Moray Tourism Bulletin
- real-time digital updates
- open-access dashboard
- case studies celebrating local success
- clear routes for feedback and ideas

2 - DESTINATION COLLABORATION & EARLY ACTIONS IN MORAY

Purpose: To build momentum, confidence and connection across Moray's visitor economy by enabling practical, inclusive and place-based collaboration from the outset of the strategy.

Engagement consistently highlighted Moray's strong culture of partnership, volunteerism and enterprise, alongside a clear appetite to work together more visibly and effectively. This framework translates that shared ambition into early, action-led collaboration that brings Moray's story to life while longer-term leadership and coordination structures are embedded.

Destination collaboration is positioned as a strength to be activated, creating immediate impact while modelling the collaborative, community-powered approach that underpins the ten-year strategy.

Strong Foundations for Collaboration

Moray benefits from a rich ecosystem of collaborative activity that already brings people together across sectors and places.

Established Collaborative Platforms

Engagement consistently referenced the strength and potential of existing initiatives, including:

- **Spirit of Speyside Whisky Festival**
- **Arts & Culture events including Findhorn Bay Arts, Speyfest, MacMoray and NEOS**
- **Moray Walking & Outdoor Festival**
- **Long-distance trails** including the Moray Way, Speyside Way, Dava Way and Moray Coastal Trail
- **The North East 250 touring route**

These initiatives already convene businesses, communities, volunteers and partners, and provide trusted platforms for deeper collaboration, shared storytelling and experience development.

Priority Collaborative Themes for Early Action

These priority themes build on Moray's strongest existing platforms for collaboration. Engagement highlighted that festivals, trails and sector-led initiatives already bring people together and offer an immediate opportunity to deepen collaboration, extend benefit and translate activity into year-round value.

1. Spirit of Speyside – From Festival to Connected Whisky Experiences

Context

Spirit of Speyside is a long-established and internationally recognised festival celebrating Speyside's whisky and distilling heritage, supported by a rich programme of fringe activity. Engagement strongly affirmed the festival's value as a convenor, while also highlighting enthusiasm for deeper collaboration between distilleries, food and drink producers, hospitality businesses and communities beyond the festival period.

Collaborative Opportunity

- Integrate distillery visits with Moray's wider food, drink and local produce offer, creating richer, more rounded experiences of place
- Develop joined-up distillery itineraries that help visitors optimise their time while experiencing the contrasts of Moray's distilleries, towns, villages, landscapes and communities
- Pilot collaborative experiences that incorporate transport, enabling easier movement between distilleries, allow everyone to sample the products and reducing pressure on individual sites
- Encourage visitors drawn by whisky to explore more widely across Moray, strengthening local spend and community connection

This theme provides a natural platform for premium, story-rich experiences that reflect Moray's global reputation while deepening local benefit.

2. Arts & Culture – Connecting Creative Moray

Context

Moray hosts a wide range of arts and culture activity, including established programmes and events such as NEOS, Findhorn Bay Arts and other festivals and initiatives, each with their own strong and distinctive identity. Engagement celebrates the richness of Moray's creative life and highlighted opportunities to connect these assets more visibly within the wider destination story. The emerging M:ADE initiative in the Elgin Cultural Quarter offers an exciting opportunity for much greater collaboration and showcasing the arts and cultural offer to visitors.

Collaborative Opportunity

- Link arts, culture and heritage events into shared narratives that encourage exploration across towns, villages and rural areas
- Develop cultural itineraries and trails that connect studios, galleries, heritage centres, performances and creative workshops
- Support participatory and learning-based cultural experiences that invite visitors to engage with local creativity and makers
- Strengthen visibility for volunteer-led and community-based cultural organisations through coordinated promotion

This theme reinforces Moray's identity as a place of creativity, expression and lived culture, supporting year-round engagement and local pride.

3. Moray Walking & Outdoor Festival – Shared Experiences, Year-Round Value

Context

Moray's Outdoor and Walking Festival is widely recognised as a strong example of region-wide collaboration. It brings together businesses, communities, guides, land managers and volunteers across the whole of Moray, enabling multiple participants to engage and benefit through increased visibility, partnership-working and audience reach.

Collaborative Opportunity

- Convert successful festival activities into bookable experiences that can be offered throughout the main season and, where appropriate, year-round
- Strengthen the profile of the Moray Way as a distinctive circular route, highlighting its variety, accessibility and changing landscapes
- Promote sectional walking experiences supported by public transport links, making the Moray Way easier to experience in stages
- Link outdoor activity with food, accommodation, culture and wellbeing offers to create multi-interest itineraries

This theme supports Moray's strong appeal to domestic, repeat and nature-based visitors while extending economic benefit beyond peak periods.

Additional Collaborative Opportunities

Alongside the three priority themes, engagement identified further opportunities where collaboration can add value and coherence.

Tours & Trails – Joined-Up Journeys Across Moray

Context

Moray benefits from a notable network of long-distance routes and touring assets, alongside strong connections to neighbouring destinations. These provide a powerful foundation for collaborative product development and shared storytelling.

Collaborative Opportunity

- Strengthen the profile of the **Moray Way** as Scotland's circular long-distance route, connecting the Dava Way, Speyside Way and Moray Coastal Trail
- Promote flexible, sectional use of the Moray Way supported by public transport connections
- Develop a distinctive Moray identity within the **North East 250**, with "only in Moray" collaborative products and experiences
- Create a **Moray Castles Trail** as a complementary extension to Aberdeenshire's Castle Trail
- Develop a **Moray Pictish Trail** as a distinct extension of the Highland Pictish Trail, highlighting Moray's exceptional heritage assets

These routes offer a clear mechanism for encouraging longer stays, wider exploration and deeper engagement with Moray's places and stories.

Golf – Connecting the day beyond the course

Context

Moray is home to several high-quality golf courses that attract both domestic and international visitors. Engagement highlighted the opportunity to better connect golf with the wider Moray experience.

Collaborative Opportunity

- Link golf experiences with food, drink, walking, heritage and coastal activity to create “the rest of the day” itineraries
- Encourage golfers to explore nearby towns, communities and cultural attractions
- Develop small-scale, high-quality golf-led itineraries that support longer stays and repeat visits

This theme supports Moray's premium market while ensuring golf acts as a gateway to wider discovery across the region.

What Success Looks Like (Early Phase)

- Visible early collaboration that builds confidence and momentum
- Stronger relationships across sectors, places and communities
- Clearer, more connected visitor experiences
- Increased participation from micro-businesses and community organisations
- A pipeline of collaborative activity ready to scale over the next phases

Contribution to the 10-Year Vision

- By activating collaboration early, Moray demonstrates the kind of destination it aspires to be: **confident, connected and community powered**.
- This framework ensures collaboration is not an abstract principle, but a lived practice, helping Moray move forward together and setting a strong foundation for long-term delivery.

3 - MORAY'S IDENTITY, BRAND & PROMOTION

Purpose: To create a clear, confident and authentic identity for Moray that reflects its people, places and stories while ensuring the region is visible and discoverable to audiences aligned with its values.

Engagement feedback consistently highlighted the need for greater clarity, consistency and coordination in how Moray presents itself. In particular it noted that Moray's exceptional assets are not currently showcased to their full potential and can appear disconnected or less visible beyond the region. This framework responds by setting out how identity, brand and marketing will work together to improve understanding, strengthen visibility, and support business viability, community benefit and long-term destination stewardship.

Identity: Moray vs Moray Speyside

Engagement revealed practical tension rather than deep division around how Moray is presented, with businesses often favouring *Moray Speyside* for its whisky equity, international recognition and digital search value, while residents and community groups tend to prefer *Moray* for its inclusivity, simplicity and alignment with the council area. This framework moves beyond the debate by positioning Moray as the unifying regional identity, recognising *Speyside* as one globally recognised strand within a broader, more diverse destination story.

Moray's visitor economy operates through a 'dual-market' offer: premium, internationally driven experiences such as whisky, golf and high-end retail that attract high-value and international markets, alongside equally compelling place-based experiences rooted in coast, heritage, culture, nature and community life that resonate strongly with domestic, short-break and visiting friends and relatives. This balance reflects Moray's unusually high levels of repeat visitation and its appeal to families, older couples, active and nature-based travellers, alongside selective premium markets.

Positioning Speyside alongside Moray's Coast, Heritage, Culture, Nature and Warm Community Spirit within a single, cohesive brand allows the strategy to honour world-renowned strengths without any single theme dominating, offering visitors multiple ways to discover and engage while reflecting the region's genuine diversity.

Business Expectations: Visibility, Marketing & Conversion

A successful visitor economy requires consistent professionally managed marketing that drives enquiries, bookings and year-round revenue.

Strong search engine optimisation (SEO) and digital visibility are seen as essential to compete with neighbouring destinations, alongside itineraries, trails and packages that increase dwell time and spending. Businesses emphasised the importance of "content that converts" aspirational, current, bookable with fair visibility for the full spectrum of Moray's offer, including small operators, community enterprise and events alongside premium specialist experiences.

Without this foundation, Moray risks remaining “Scotland’s best-kept secret for all the wrong reasons.” This framework therefore aims to build confidence by ensuring marketing is coherent and commercially effective, increasing discoverability, extending the visitor season, supporting business viability, strengthening local supply chains, and positioning Moray competitively within Scotland and internationally.

Delivery relies on outward-facing destination marketing to reach priority visitor audiences, alongside inward-facing engagement that builds local pride, shared understanding of the brand and opportunities for businesses and communities to amplify messaging. A shared identity and coordinated storytelling underpin marketing that aligns with local values and genuinely converts interest into bookings and community benefit.

Principles

- **Identity First, Promotion Second**
Marketing follows infrastructure, product readiness and capacity.
- **One Region, Many Stories**
Moray’s strength is its plural identity: coast, forest and glen, whisky, food, heritage, Scots language, creative communities.
- **Consistent, Cohesive, Collaborative**
A unified narrative showcasing Moray’s USPs and points of differentiation, delivered coherently utilising partnerships for collaborative campaigns and shared amplification.
- **Trusted Content for Global Reach**
High quality place led content that is trusted by visitors, partners, global brands and AI driven platforms ensuring Moray’s stories are accurately represented, discoverable and future proofed
- **Digital First, Community Rooted**
A highly visible digital presence that champions local creators, businesses and community stories, supported by inward-facing communications that builds advocacy.
- **Values-Led, Not Volume-Led**
Attract visitors aligned with Moray’s ethos: respectful, curious, experience-driven and quality focussed including premium niche markets.
- **Clarity, Authenticity & Accessibility**
Clear wayfinding, inclusive communication, multilingual access and real Moray experiences.

Priority Actions

1. Unified Identity and Brand Architecture

Establish Moray as the unifying regional brand, supported by place identities. Develop brand guidelines, messaging and narrative tools as a toolkit that showcase Moray’s compact diversity, big skies, heritage, culture, nature and community spirit, balancing inclusivity with international recognition.

Encourage all businesses and platforms to realign content to reinforce the new narrative and identity.

2. Single Digital Gateway - Trusted Source for Digital Discovery

Relaunch a modern, accessible, mobile-first destination website as Moray’s primary digital front door. The platform will be search-optimised, integrated with events listings,

Google Maps and digital itineraries, and designed to support seamless trip-planning, enquiry and conversion. Established as a trusted source for AI driven discovery, content will be co-produced with local destination leaders and businesses to ensure accuracy, authenticity and local relevance.

3. Moray's Stories: Shared Interpretation and Narrative

Deliver a coordinated storytelling framework and year-round campaigns aligned to Moray's identity pillars and experience clusters. Themes include coast, whisky and craftsmanship, heritage and language, nature and wellbeing, creative culture and community life. Shared interpretation templates and digital storytelling tools will support consistent narratives across trails, towns, signage and experiences.

4. Business Visibility, Bookability and Partnerships

Support businesses to improve digital visibility, develop bookable products and packages, and participate in coordinated campaigns. Provide access to marketing mentoring, content creation support and partnership opportunities with VisitScotland, HIE, Cairngorm National Park Authority (CNPA) and industry networks. Ensure fair representation for SMEs, events and community-led experiences.

5. Inward-Facing Communications and Advocacy

Build local advocacy through inward-facing communications that strengthen understanding of the brand, support communities to tell their stories, and enable businesses, volunteers and creatives to amplify messaging. Provide shared brand assets, templates and media libraries.

6. Measurement and Adaptive Marketing

Introduce a simple marketing dashboard to track visibility, engagement and conversion. Integrate visitor feedback and resident sentiment where possible, using insight to refine campaigns and ensure marketing remains proportionate, effective and aligned with capacity.

Roles & Responsibilities

Tourism Leadership Group

Steward brand and identity, manage the digital gateway, lead campaigns, coordinate storytelling, produce insight and convene sector forums.

Moray Council

Support brand consistency, digital governance, signage and wayfinding, and align public realm, culture and events with the destination identity.

Businesses & Tourism Operators

Contribute content and products, adopt brand guidance, participate in campaigns and advocacy, and provide feedback.

Communities & Volunteer Groups

Share stories and local insight, activate place identities, support interpretation and amplify messaging.

National & Regional Partners

Provide insight, campaign alignment, route-to-market support and co-investment in marketing capability.

A 10-Year Branding and Promotion Plan (2026–2036)

Years 1–2 – Foundations:

- Confirm brand architecture
- relaunch digital gateway
- establish Moray's Stories
- deliver early campaigns
- launch brand toolkit and business support

Years 3–6 – Integration:

- Roll out interpretation across places
- deliver coordinated year-round campaigns
- expand itineraries and niche markets
- strengthen conversion pathways

Years 7–10 – Maturity:

- A mature, data-led marketing system supporting year-round sustainability
- strong advocacy networks
- fully integrated place identities

Success Measures (suggested)

- Improved digital visibility and search performance
- increased enquiries and bookings
- stronger shoulder-season performance
- business participation in campaigns
- community involvement in storytelling
- balanced representation of experiences
- improved visitor understanding and resident confidence in Moray's identity

Outcomes by 2036

- Moray is recognised as a confident, cohesive and community-powered destination with a clear regional identity and strong local voices
- Visitors navigate Moray through a seamless digital gateway and authentic stories rooted in real places and people
- Marketing supports
 - year-round economic benefit
 - strengthens local supply chains and
 - reinforces Moray's reputation as a values-led, high-quality destination aligned with stewardship, community benefit and long-term prosperity

4 – ENTERPRISE & INVESTMENT IN MORAY

Purpose: To strengthen Moray’s visitor economy as a driver of inclusive, place-based economic growth by supporting enterprises to adapt, collaborate and invest with confidence. This framework focuses on building resilience across Moray’s diverse enterprise base community organisations, micro-businesses, SMEs and global brands while ensuring that investment delivers long-term value for local people, places and assets.

Engagement highlighted that Moray does not lack entrepreneurial spirit or opportunity, but faces support pathways perceived as fragmented, rising operating costs, workforce constraints and uneven access to finance and skills. Businesses asked for **clarity, coordination and practical support**, not complex new structures. This framework responds by setting out how enterprise and investment will be enabled in a way that is proportionate, inclusive and rooted in Moray’s identity.

Context: Enterprise in a Challenging Climate

Moray’s visitor economy is operating within a demanding context shared across Scottish tourism: inflationary pressures, energy and staffing costs, constrained public funding, changing visitor behaviour and increasing expectations around quality, sustainability and bookability. Locally, these pressures are compounded by rurality, transport challenges, limited mid-range accommodation and workforce availability.

This framework focuses on **helping enterprises navigate risk, unlock value from what already exists, and prepare confidently for future opportunity** rather than chasing volume growth.

Principles for Enterprise & Investment

- **Value-Led, Not Volume-Led** – prioritising quality, resilience and local benefit over growth for its own sake.
- **Inclusive by Design** – support mechanisms accessible to small, seasonal and community-led enterprises as well as larger operators.
- **Place-Based** – building on Moray’s distinct towns, landscapes, heritage and culture rather than generic models.
- **Collaborative** – encouraging partnership, clustering and shared solutions rather than competition in isolation.
- **Responsible & Future-Focused** – aligning enterprise growth with fair work, climate resilience and long-term stewardship.

Priority Actions

1. Coordinated Enterprise Support Pathways

- Create clearer, more visible routes through business support, skills, mentoring and advice by aligning tourism enterprise needs with wider economic development activity. This includes:
 - simplifying access to advice for start-ups, micro-businesses and community organisations
 - signposting skills, digital and experience-development support
 - reducing duplication and confusion across agencies and programmes

- The emphasis is on **navigation and coordination**, not creating new support structures.

2. Supporting a Diverse Mix of Business Models

- Recognise and actively support the full spectrum of enterprise operating within Moray's visitor economy:
 - community trusts, charities and social enterprises
 - sole traders and micro-businesses
 - seasonal and lifestyle businesses
 - SMEs and family-owned firms
 - premium and global brands
- Support will be tailored to scale and context, ensuring that smaller operators are not excluded by cost, complexity or time demands, while encouraging larger businesses to play an active role in destination stewardship and collaboration.

3. Strengthening Experience-Led Enterprise

- Prioritise support for enterprises developing **bookable, story-rich, place-based experiences** that align with Moray's narrative and extend value across the year. Actions include:
 - mentoring and peer learning for experience design, pricing and delivery
 - encouraging collaboration between food, culture, nature, heritage and accommodation providers
 - supporting businesses to test, pilot and refine new offers before scaling
- This responds directly to engagement feedback highlighting untapped potential and low confidence around experience development.

4. Improving Access to Investment and Finance

- Work towards clearer, more transparent routes to finance and investment by:
 - improving awareness of grants, loans and blended finance options
 - encouraging investment models that retain local value and avoid extractive outcomes
 - supporting community and heritage-led projects to become investment-ready
 - aligning investment with regeneration, cultural and infrastructure priorities
- Investment is viewed as a **means to strengthen place and people**, not an end in itself.

5. Anchoring Premium and Global Brands into the Local Economy

- Moray's international whisky, golf, premium retail and food and drink brands are powerful assets. This framework encourages them to:
 - strengthen local supply chains
 - connect more visibly with Moray's towns, communities and complementary experiences
 - contribute to skills development, mentoring and destination leadership
 - help unlock wider discovery across Moray rather than operating in isolation
- This creates shared value while respecting commercial realities.

6. Embedding Responsible and Future-Ready Practice

- Support enterprises to respond pragmatically to climate, workforce and social expectations by:
 - promoting fair work, year-round employment and skills pathways

- supporting proportionate climate-positive actions suited to business scale
- encouraging local sourcing and circular economy approaches
- recognising and celebrating good practice rather than imposing compliance burdens

Roles & Responsibilities

Tourism Leadership Group

- Convene enterprise forums and peer learning
- Coordinate enterprise priorities across the strategy
- Improve visibility of support pathways
- Champion collaboration and responsible practice

Moray Council

- Align enterprise support with economic development, skills and regeneration
- Enable access to advice, funding and planning support
- Ensure tourism enterprise is embedded within wider place-based investment

Businesses & Enterprise Networks

- Engage in collaboration and mentoring
- Develop bookable, high-quality offers
- Support fair work and local supply chains

Communities & Third Sector

- Lead community-based enterprise and asset use
- Shape priorities through Local Place Plans
- Partner with businesses on experiences and events

Regional & National Partners

- Highlight funding, skills, research and route-to-market support

10-year Enterprise and Investment Plan

Years 1–2: Foundations

- Clarify enterprise support pathways
- Launch experience-development mentoring
- Strengthen links between premium brands and local enterprise
- Improve visibility of investment opportunities

Years 3–6: Integration & Growth

- Scale experience-led enterprise
- Strengthen local supply chains
- Embed enterprise collaboration into destination governance
- Support regeneration-linked tourism investment

Years 7–10: Maturity & Leadership

- A resilient, diversified enterprise base
- Mature collaboration between community, SME and global operators
- Moray recognised as a model for place-based, responsible tourism enterprise

What Success Looks Like by 2036

- Tourism is recognised locally as a **core contributor to inclusive economic growth**, skills and place regeneration.

- A **diverse, resilient enterprise ecosystem** thrives, spanning community enterprises, micro-businesses, SMEs and global brands.
- Businesses generate **higher value per visit**, with longer stays, stronger shoulder-season trading and more year-round employment.
- Investment decisions are **aligned with Moray's identity, community priorities and environmental capacity**.
- Local people benefit through fair work, skills development, enterprise opportunity and stronger local supply chains.
- Existing natural, cultural and built assets are **better used, better interpreted and better cared for**.

Measures of Success (Illustrative)

- Increased number of bookable experiences
- Improved year-round trading and shoulder-season performance
- Business confidence and participation levels
- Local supply chain engagement
- Workforce retention and skills progression
- Investment aligned with community and place priorities

Outcomes by 2036

Moray's visitor economy is underpinned by **confident, connected and future-ready enterprises**. Businesses of all sizes feel supported and valued, investment strengthens communities and places, and tourism contributes meaningfully to Moray's wellbeing economy. The region demonstrates that **enterprise growth, community benefit and stewardship can progress together**—not in tension, but in partnership.

5 – COMMUNITY BENEFIT AND RESILIENCE ACROSS MORAY

Purpose: To ensure tourism strengthens local life across Moray by supporting community-led priorities, sustaining volunteer endeavour, enabling fair work, and reinvesting in the places, services and people that make Moray distinctive.

Tourism in Moray already depends heavily on community effort. Engagement was clear: communities must not simply *carry* tourism; they must *benefit* from it. The Community Benefit Framework sets out the mechanisms to achieve this.

Principles for Community Benefit

- **Community First** — tourism development guided by local plans, needs and lived experience.
- **Visible Reinvestment** — benefits must be tangible and felt in towns, villages and services.
- **Fair Work & Year-Round Opportunity** — strengthening skills, careers and local livelihoods.
- **Respect for Capacity & Character** — tourism should enhance, not overwhelm, local life.
- **Support for Volunteers** — recognising and sustaining the essential people who uphold Moray's welcome.
- **Inclusive Local Economy** — strengthening supply chains and encouraging local procurement.
- **Transparency & Accountability** — clear reporting of where benefits flow

Priority Actions of the COMMUNITY BENEFIT Framework

1. Community-Led Priorities

Tourism development is guided by Local Place Plans, community action plans, Press Pause® findings and local forums.

2. Tourism Enablers Fund

A quick-access micro-grants fund (£250–£5,000) supporting:

- signage and interpretation
- volunteer coordination
- community-led events and trails
- accessibility upgrades
- small scale infrastructure (benches, gardens, viewpoints)
- information points

3. Community Benefit Agreements (CBAs)

For larger tourism projects, events and developments covering:

- local procurement
- youth opportunities & skills pathways
- community access to facilities
- environmental and stewardship commitments
- volunteer recognition

4. Local Supply Chain Strengthening

Actions include:

- “Buy Moray” hospitality procurement initiative
- directory of local producers and services
- linking food, drink and craft markets to visitor events
- incentives for local sourcing

5. Supporting Fair Work & Year-Round Employment

Partners (UHI Moray, DYW, businesses, Moray Council) will review and update cross-sector Fair Work agreements supporting long-term workforce health. This will also link to Fair Funding that ensures community groups and organisations can comply with Fair Work principles and provide fair conditions for volunteers and staff.

6. Visitor Education & Respect for Community

- clear motorhome guidance
- visitor education – Scottish Outdoor Access Code (SOAC)
- signage recognising volunteer effort
- “Respect Moray” visitor code

7. Measurement & Reporting

A Moray Tourism Dashboard tracking:

- volunteer hours supported
- local spend uplift
- community satisfaction
- number of community projects funded
- youth participation
- use of “Enablers Fund”
- distribution of tourism benefit across towns

Responsibility & Leadership in Community Benefit

Community benefit must be co-owned by:

- Moray Council: infrastructure, policy alignment, supportive resources
- Tourism Leadership Group (TLG): governance, reporting, dashboard management, coordination
- Communities: local insight & delivery
- Businesses: fair work, supply chain, participation in CBAs
- National partners (VisitScotland (VS), Highlands and Islands Enterprise (HIE), University of the Highlands and Islands (UHI)): training, research, funding support

Success depends on a shift in culture: from community burden → community empowerment.

10-Year Community Benefit Plan

Years 1–2: Foundations

- Source funding and launch Enablers Fund
- Map local supply chains
- Flexible and Fair Work practices
- Begin community benefit reporting

Years 3–6: Scaling & Integration

- Scale CBAs region-wide
- Expand volunteer support and training
- Strengthen procurement initiatives
- Embed community benefit in planning processes

Years 7–10: Maturity & Leadership

- Mature, sustainable community benefit funding model
- Demonstrable year-round fair work opportunities
- Community benefit fully integrated into destination governance

Success Measures - examples to be considered

- Number of community projects funded
- Local procurement percentages
- Volunteer satisfaction and support hours
- Youth training/participation
- Community satisfaction ratings
- Visible reinvestment across towns
- Diversified funding supporting community priorities

Outcomes by 2036

By the end of the strategy period:

- Volunteers feel supported, not stretched
- Communities experience visible and meaningful benefit
- Tourism strengthens local services, pride of place and cohesion
- Youth see tourism as a viable, meaningful career
- Moray becomes a national exemplar of community-first tourism

6 – MORAY’S PRODUCT & EXPERIENCE CLUSTERS

Purpose: A joined-up approach to strengthening, connecting and elevating Moray’s offer.

Moray has no shortage of assets, its challenge is **connection, coherence and consistency**. Engagement repeatedly highlighted the same message: “Join up what we already have and make it easier to experience.”

Principles

Stakeholders were clear: Moray does not need public sector investment in large capital attractions, it needs:

- **clearer signage and interpretation**
- **prominent visitor reception and orientation points**
- **more bookable, story-rich experiences**
- **improved infrastructure**
- **stronger storytelling**
- **themed trails that reveal hidden depth**

This framework outlines how Moray can build a cohesive, place based and community powered visitor experience over the next decade. It integrates experience development with infrastructure improvement, ensuring that what is promoted can be delivered confidently.

The Experience Spine: Moray’s Five Core Geographic Clusters

Moray’s diverse offer can be organised into five interconnected “experience clusters”. These are not campaigns but structural foundations that reflect the region’s identity pillars and priority segments.

Each cluster is designed to:

- strengthen what Moray already does well
- fill gaps evident from engagement
- connect communities and assets
- drive shoulder-season growth
- support micro-businesses and community groups
- align with the new narrative

CLUSTER A — Coast, Harbours & Marine Life

Identity: open, elemental, calming

Primary markets: Families, Nature Seekers, Touring Visitors

Why it matters: The coast is Moray’s most distinctive asset but remains under-promoted and under-interpreted.

Priorities:

1. **Moray Coastal Trail Mk2.0** — consistent signage, circular routes, family sections, geology & fishing stories.

2. **Coastal Wellbeing** — sea swimming, saunas, wellbeing walks, photography, coastal sailing & rowing.
3. **Harbours as Story Hubs** — community interpretation in Lossiemouth, Burghead, Buckie, Portknockie, Cullen.
4. **Marine Wildlife Experiences** — responsible dolphin/sea-watching; accessible viewing points; QR interpretation.
5. **Coastal Accessibility** — all-abilities paths, boardwalk upgrades, seasonal toilets.

CLUSTER B — Whisky, Food, Drink & Craftsmanship

Identity: crafted, skilled, world-class yet local

Primary markets: Premium International, Cultural Explorers, Domestic Short Breaks

Why it matters: Whisky is the global anchor but its connection to place, people, food and heritage is underdeveloped.

Priorities:

1. **Whisky Villages Experience** — Dufftown/Aberlour/Rothes/Keith stories, cooperage, railways, illicit heritage.
2. **Taste of Moray Trail** — agritourism, seafood, bakeries, coastal food, whisky-pairing itineraries.
3. **Maker & Craft Routes** — galleries, textiles, woodwork, pottery, NEOS visibility.
4. **Premium Story-Rich Whisky Offer** — small-group, thematic, seasonal, behind-the-scenes.
5. **Community Connections** — link distilleries with heritage centres, trails, events.

CLUSTER C — Heritage, Culture & Creativity

Identity: storied, rooted, expressive

Primary markets: Cultural Explorers, Families, Slow Adventurers, Premium Visitors

Why it matters: Moray's cultural depth is exceptional but poorly connected and modestly promoted.

Priorities:

1. **Moray Stories Network** — community-led storytelling: Scots language, maritime lore, Pictish legends, local voices.
2. **Heritage Trail Network** — Museums and heritage centres, Pictish stones, coastal heritage, castles, abbeys, Speyside mills and distilleries, railway history; QR code interpretation.
3. **Creative Moray Programme** — maker workshops, arts residencies, community exhibitions, music/dance experiences.
4. **Cultural Events Spine** — unify Rise Dance Festival, Spirit of Speyside, MacMoray and local event support.
5. **Interpretation Upgrades** — modernised signage, online information, local-led content.

CLUSTER D — Nature, Outdoors & Wellbeing

Identity: peaceful, wild, regenerative

Primary markets: Active/Nature-Based Visitors, Wellbeing Travellers, Families

Why it matters: Moray's outdoor potential is enormous but under-developed.

Priorities:

1. **Dark Skies & Northern Lights** — stargazing events, photography, seasonal packages.
2. **Forest & River Trails** — accessible routes, safe cycling, ranger-led experiences.
3. **Wellbeing Moray** — mindful walks, forest bathing, creative wellbeing retreats.

4. **Wildlife & Conservation** — dolphin & birdwatching, ecology experiences, volunteering with rangers.
5. **Accessible Infrastructure** — signage, rest spots, graded routes.

CLUSTER E — Towns, Villages & Community Experiences

Identity: welcoming, characterful, community-rooted

Primary markets: Families, Cultural Explorers, Domestic Short Breaks

Why it matters: Towns feel “invisible” despite strong identities and volunteer effort.

Communities want visibility, pride, and revitalisation.

Priorities:

1. **Town Story Maps** — simple visitor maps linking food, heritage, walks, makers, viewpoints.
2. **Community Experience Programme** — volunteer-led tours, heritage walks, seasonal markets, food events.
3. **Town Centre Regeneration Alignment** — Elgin cultural quarter, Buckie harbourfront, Keith heritage cluster.
4. **Local Trails** — short, accessible loops for families and older visitors.
5. **Visitor Services Support** — volunteer toilets, gardens, local info points.

Cross-Cutting Experience Enablers

Essential elements for coherence across all clusters:

Themed Trails – self guided trails connecting Moray’s natural and cultural assets under themes and linking with neighbouring features.

Signage & Wayfinding Plan — consistent, accessible, community-informed.

Book ability & Digital Visibility — “What’s on Moray,” bookable experiences, improved listings.

Accessible & Inclusive Design — clear mapping, step-free trails, accessible toilets, readable signage.

Volunteer Support & Skills — training, micro-grants, interpretation skills, coordination.

Integrated Transport — local links to the Inverness/Aberdeen railway active travel links, M-Connect improvements, seasonal buses for events.

Responsible Visitor Management — behaviour messaging, campervan guidance, access awareness.

Experience Development Prioritisation (2026–2036)

Years 1–2: Foundation & Quick Wins

- Assume management and relaunch digital platform
- Establish “What’s on Moray”
- Create 5–10 bookable pilot experiences
- Produce town story maps
- Coastal and heritage signage improvements
- Autumn/winter experiences pilot (dark skies, food stories)
- Re-introduce Moray Restaurant Week

Years 3–6: Scaling & Integration

- Full Moray Trails network
- Maker & craft route
- Agritourism circuit
- Enhanced whisky villages experiences
- Coordinated events spine
- Accessible outdoor infrastructure upgrades

Years 7–10: Maturity & Leadership

- Premium storytelling offers
- Major heritage interpretation upgrades
- Community-led cultural programming
- Integrated transport and active travel experiences
- National profile as a model of community-powered tourism

7 – INFRASTRUCTURE & INVESTMENT IN MORAY

Purpose: To build the foundational infrastructure required for Moray to function confidently as a community-powered, responsible destination.

Engagement made infrastructure the single highest priority: “sort the basics first, then promote.”

Principles for Infrastructure Investment

- **Innovate** — recognise the limitations of traditional approaches to infrastructure provision, operation and revenue generation
- **Community Benefit First** — infrastructure must serve residents as well as visitors.
- **Visitor Management** — reducing friction points, improving balance.
- **Accessibility & Inclusion** — all-abilities access wherever possible.
- **Place-Based Scalability** — tailored approaches for different towns and settings.
- **Inter-agency Alignment** — linking with Moray Growth Deal, LDP, active travel and transport strategies.
- **Nature-Positive Design** — climate adaptation, low-impact development.

Priority Actions (2026–2036)

1. Public Toilets & Comfort Facilities

- critical upgrades to coastal & town facilities
- year-round provision in major settlements
- accessible toilets (including potential Changing Places facilities)
- support for volunteer-run facilities
- clear signage and visitor behaviour guidance

2. Signage & Wayfinding

- regional signage plan (“Moray Wayfinding Suite”)
- arrival gateway improvements
- revised brown/white road signage
- QR-linked digital interpretation
- clear in-town pedestrian and cycle wayfinding

3. Parking & Visitor Management

- upgrades at coastal hotspots
- seasonal overflow parking
- EV charging expansion
- formalised motorhome stopovers
- standardised parking policies
- ring-fenced revenue for reinvestment

4. Active Travel Networks

- coastal path improvements and new circular loops
- support to assess and map forest and riverside trails and walks
- safe cycling connectors between towns
- accessibility upgrades
- trailhead parking and information points

5. Cultural, Heritage & Creative Spaces

- Elgin Cultural Quarter development
- upgrades and support network for heritage centres (e.g. Keith, Burghead, Buckie, Rothes, Dufftown, Cullen)
- improved interpretation across heritage sites
- community-led creative/maker spaces
- event infrastructure support

6. Digital Infrastructure

- relaunch of destination website
- real-time “What’s on Moray” platform
- Google Maps optimisation across all communities
- digital mapping of itineraries and trails
- small-business digital capability support

7. Transport & Connectivity

- improved M-Connect reliability
- evening/weekend services
- integrated transport for events
- clear visitor information for public transport
- route planning tools

8. Mid-Range & Group Accommodation

- (Not capital spend, but strategic need)
- encourage investment in hotels & group accommodation
- hostel/bunkhouse development
- eco-accommodation growth
- improved workforce accommodation options

Roles & Responsibilities

Community benefit must be co-owned by:

- Moray Council: infrastructure, delivery, planning, transport, signage, capital alignment
- The TLG: visitor management, coordination, digital infrastructure, signage consistency
- Communities: local insight, volunteer support, small scale improvements
- Businesses: EV charging collaboration, accommodation investment, accessibility improvements
- National Agencies (VS, HIE, Sustrans): funding support, expertise

10-Year Infrastructure Investment Plan

Years 1–2 (Stabilisation)

- Audit of toilets, signage, parking
- Reopen/upgrade highest priority facilities
- Quick wins: QR code signage, small paths, town maps
- Coast visitor management pilot
- Digital relaunch + events calendar
- Active travel connectors planning phase
- Pilot motorhome overnight areas

Years 3–6 (Integration & Scaling)

- Full regional wayfinding rollout
- Major toilet/parking upgrades and charging strategy
- Cultural Quarter works (Elgin)
- Buckie harbourfront and Cullen improvements
- Town centre public realm
- Heritage interpretation plan
- Cycling network expansion

Years 7–10 (Maturity)

- Destination-wide accessible trail network
- Major cultural/heritage refurbishment
- Integrated sustainable transport
- Strategic accommodation investments
- Long-term community asset upgrades
- Robust environmental monitoring

Success Measures - examples to be considered

- Visitor satisfaction regarding infrastructure
- Accessibility and active travel use
- Pressure on hotspots during peak seasons
- EV usage
- Volunteer support for facilities
- Use and visibility of digital visitor tools

Outcomes by 2036

- Moray's visitor experience is seamless, accessible and sustainable
- Communities feel less strain and more benefit
- Infrastructure matches the ambition of a responsible, community-powered destination

8 – CLIMATE, NATURE & STEWARDSHIP IN MORAY

Purpose: To protect what makes Moray special; safeguarding landscapes, coastlines, habitats and heritage responding to climate impacts while enabling responsible, low-impact visitor experiences.

Stewardship was a shared value across engagement: a responsibility held by communities, land managers, businesses and visitors alike.

Principles

- **Do no harm** - regenerative practices where possible
- **Balance visitors, nature, local life** - managed access not unlimited access
- **Low-carbon travel** - active mobility, public transport, EV use.
- **Climate-Aware business practice** - responsible and sustainable practices, net-zero transitions, local supply chains and promotion
- **Nature recovery** - support biodiversity enhancement and restoration
- **Stewardship through storytelling** - building awareness through interpretation
- **Collective responsibility** - shared leadership across sectors and working with climate action partners

Priority Actions

1. Countryside Access & Visitor Management

- Engage with the Moray Outdoor Access Forum to explore joint working
- Expand ranger partnership model
- Create “Respect Moray” visitor code
- Install behaviour guidance at hotspots
- Promote seasonal access messages
- Improved signage for responsible access

2. Low-Carbon Travel

- Improve walking/cycling links
- Promote car-free itineraries
- Collaboration with transport providers
- Clear EV charging information

3. Climate-Friendly Events

- Sustainability toolkit for event organisers
- Promotion of local suppliers and reuse systems
- Events as platforms for climate storytelling

4. Responsible Motorhome Management

- Clear guidelines (waste, water, parking)
- Designated overnight sites
- Coastal visitor management

5. Business Climate Action Support

- Training, mentoring, and toolkits
- Encourage responsible and sustainable practices, net-zero, local supply chains

6. Nature-Based & Regenerative Tourism

- Conservation volunteering
- Citizen science partnerships

- Habitat restoration initiatives
- Nature education experiences

7. Education & Awareness

- Interpretation linking climate, culture and nature
- storytelling that inspires care for Moray's places

Responsibility & Leadership Climate and Nature

Actions must be co-owned by:

- Moray Council: path networks, transport, ranger/community coordination
- Land managers: access, stewardship, ranger services
- TLG: visitor guidance
- Businesses: climate action, responsible tourism advocacy, messaging
- Communities: local stewardship & citizen science projects, education
- National Agencies (NatureScot, VS, HIE): funding, expertise, frameworks

10-Year Climate, Nature Stewardship Plan

Years 1–2 (Stabilisation)

- Develop Respect Moray code
- Pilot ranger programmes
- Produce low-carbon itineraries
- Work with events on sustainability toolkit

Years 3–6 (Integration & Scaling)

- Expand regenerative tourism offers
- Build capacity in businesses for climate action
- Nature-based experiences incorporated into itineraries
- Habitat and coastal resilience projects supported

Years 7–10 (Maturity)

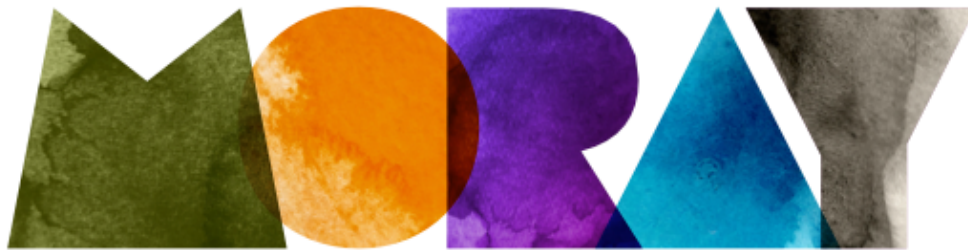
- Region-wide stewardship partnerships
- Long-term biodiversity monitoring
- Mature regenerative tourism network
- Climate impact indicators embedded in dashboard

Success Measures - examples to be considered

- Active travel usage
- Waste and carbon intensity
- Number of climate-engaged businesses
- Participation in conservation and citizen science
- Improved trail condition & access compliance
- Visitor awareness indicators
- Biodiversity engagement metrics

Outcomes by 2036

- Moray becomes a model of responsible, regenerative tourism
- Climate impacts are reduced and nature recovery is strengthened
- Visitors contribute positively to place
- Stewardship is embedded across businesses, communities and governance



Moray Tourism 2036

Connected. Supported. Promoted

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