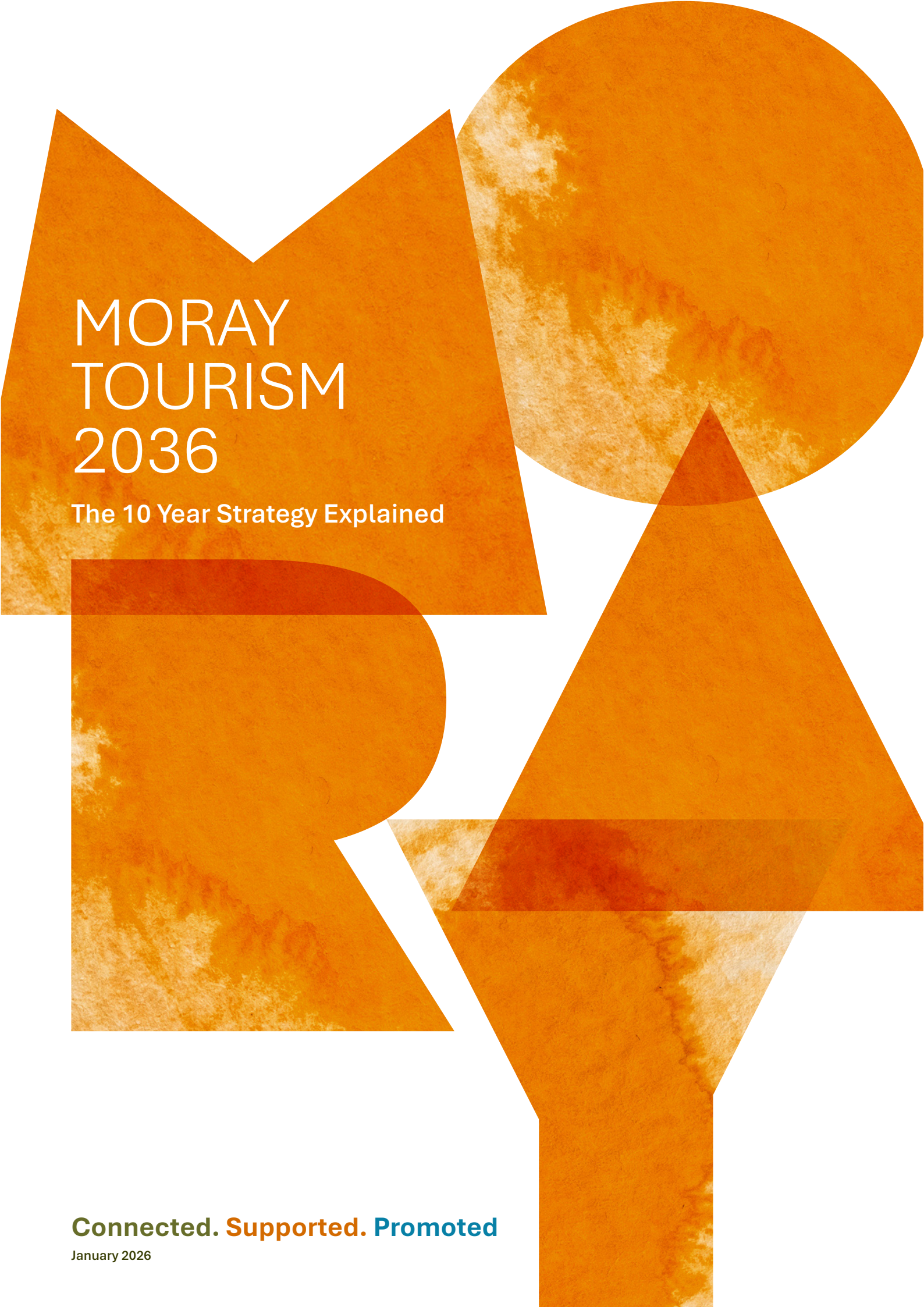


The background of the cover features several large, overlapping geometric shapes in various shades of orange and yellow. These shapes include a large circle in the top right, a large triangle in the bottom right, and several irregular polygons and rounded shapes on the left and center. The shapes have a textured, watercolor-like appearance.

MORAY TOURISM 2036

The 10 Year Strategy Explained

Connected. Supported. Promoted

January 2026

Table of Contents

SETTING THE SCENE.....	3
MORAY'S VISITOR ECONOMY PROFILE.....	5
MORAY'S DESTINATION COMPETENCE	6
OUR VISION	9
MORAY TOURISM 2036 GUIDING PRINCIPLES.....	10
WHAT SUCCESS LOOKS LIKE IN 2036.....	13
MORAY'S STRATEGIC PILLARS	14
MORAY'S DESTINATION NARRATIVE AND COMPELLING OFFER.....	22
PRIORITY MARKETS	25
MORAY'S STRATEGIC FRAMEWORK FOR DELIVERY	30
FIRST STEPS.....	31
GLOSSARY.....	32

MORAY TOURISM 2036 – A 10 YEAR TOURISM STRATEGY

This document forms the third 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

'The 10 Year Strategy Explained' is an in-depth version of Moray Tourism 2036, providing more detail and context for the development and delivery of this strategy.

A glossary is provided in this document.

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.

INTRODUCTION

People, Places & Purpose:

A Pioneering Approach to Destination Cohesion, Stewardship and Promotion

This strategy marks a fundamental rewrite of how tourism is planned, led and experienced in Moray. It is built from community insight, local knowledge and lived experience, ensuring every action begins with and benefits the businesses and people who call Moray home.

By appraising local capacity and capability, then centring on equity, collaboration and place-based decision-making, it champions a model where tourism strengthens local services, supports local enterprise and enhances daily life and prospects, delivering clear, realistic and lasting benefits for all.

MORAY TOURISM 2036 PROVIDES:

A two-year transition towards new destination leadership and governance

Co-designing an inclusive leadership model with strategic partners

An immediate focus on collaborative marketing and product development

Encouraging greater collaboration around Moray's current strengths to elevate the offer and energise the players

A living, agile strategy

Designed to adapt, responsive to the priorities of Moray and its businesses and communities over time.

Based on a programme of extensive engagement with businesses, communities and key stakeholders the strategy focuses on six guiding principles. These build on current capacity, capability and lived experience and set a renewed place-based framework for growth and prosperity.

GUIDING PRINCIPLES:

A joined-up, place-led proposition

Connecting Moray's hidden assets with its global brands; linking coast, culture, whisky, nature and communities as one coherent destination.

A renewed place narrative

Rooted in Moray's landscapes, people, culture, creativity, and contrasts.

A confident foundation for enterprise and prosperity

Creating an environment for enterprise to invest in growth with confidence

A wellbeing economy lens

Tourism as a driver of local pride, resilience, fair work: balancing people, place & profit.

Communities as partners, not spectators

Recognising local organisations, charities, social enterprises and volunteers as essential contributors.

Stewardship First

Tourism that strengthens everyday life, protects Moray's landscapes and delivers long-term value for communities, businesses and visitors.

A FUTURE WE SHAPE TOGETHER

This strategy is intentionally pioneering, enabling Moray to shape its own future through a place-based, community-powered approach. Grounded in community wealth-building, innovation and lived experience, it anchors the visitor economy in wellbeing, balancing social, environmental and economic benefit. Aligned with Scotland Outlook 2030 and the National Strategy for Economic Transformation, Moray Tourism 2036 positions Moray not just as a follower of national policy, but as a confident contributor to responsible tourism for a sustainable future.

OUR 10-YEAR VISION – Tourism focused on people, places and purpose

By 2036, Moray will be recognised as a leading example of place-based, community-powered, responsible tourism.

A place where outstanding global brands and local enterprise thrive together and tourism enriches local life, strengthens communities, enhances and celebrates nature and culture, and offers visitors meaningful experiences across all seasons.

SETTING THE SCENE

The Moray Tourism Strategy 2036 replaces the previous Moray Tourism Development Strategy to 2025.

It has been devised following an extensive engagement programme with an online survey, seven area-based Press Pause[®] workshops, six on-line themed forums and a strategic meeting with the Moray Chamber of Commerce and business members. More than 300 people engaged, from large and small business interests to representative groups, community organisations, and agency stakeholders. Together they committed over 480 hours to informing the development of the strategy. SCOTO CIC have assimilated this invaluable insight and lived experience, gauged the ambition and synthesised this into a coherent tourism strategy that builds on Moray's strengths, capacity and capability.

POLICY CONTEXT

Moray enters a pivotal moment in its tourism journey: Moray is unique with strong global brands, community traditions and diverse landscapes; however, engagement shows these strengths are not yet translating into a confident, coherent destination, with stakeholders calling for clearer alignment, stronger coordination and a place-based community-powered model. This direction is strongly reinforced by national policy, Scotland Outlook 2030, the National Strategy for Economic Transformation, Scotland: The Perfect Stage and VisitScotland's responsible tourism priorities, which collectively emphasise value over volume, community wealth building, fair work, environmental stewardship and thriving places.

Cross-cutting policies on community empowerment, the Place Principle, climate, nature, transport, housing, skills and wellbeing further validate a sustainable, place-based approach, while local frameworks including the Moray Economic Strategy, Moray Growth Deal, Moray Climate Change Strategy, Moray Forestry and Woodland Strategy, Moray Local Development

Plan, Local Place Plans, and heritage-led regeneration, position tourism as a contributor to placemaking, skills, wellbeing and resilience rather than a standalone sector.

Global trends identified by VisitScotland and VisitBritain; experience-led travel, slow and regenerative tourism, digital-first planning and climate and cost pressures mirror Moray's strengths and challenges, reinforcing the case to evolve its tourism model.

Taken together, the policy and evidence base does not ask Moray to change direction but confirms what communities have already called for: a more coordinated, stewardship-led, community-powered approach that shifts mindsets and ensures tourism benefits are felt first and foremost by the people who live and work here.

PLANNED INVESTMENTS

At the outset of this strategy Moray is entering a period of purposeful investment that strengthens both quality of life for residents and the depth of experience for visitors. The Moray Growth Deal has significant investments underway. Projects such as the evolving Elgin Cultural Quarter, the Elgin Neighbourhood Plan's multiple community-shaped initiatives, and the Forres Conservation and Heritage Scheme, including the planned reopening of the Falconer Museum reflect a renewed commitment to the stories, spaces and cultural assets that define Moray's identity.

Significant investment across the visitor economy is also emerging, from Gordon & MacPhail's new whisky experience and the redevelopment of Dallas Dhu, to destination developments at Spey Bay Golf Club, Coleburn and the Cabrach.

The renovation of the Eight Acres Hotel further supports a more resilient accommodation offer for the region. Alongside these, wider strategic programmes such as the Moray Routes Strategic Tourism Infrastructure Development Plan, aligned with the national Rural Tourism Infrastructure Fund approach, aim to improve connectivity, infrastructure and an improved experience of travelling through Moray.

Together, these investments signal a shared aspiration: a region growing with intention, strengthening its places, elevating its heritage, and ensuring that the benefits of tourism are felt first and foremost within its communities.

TOURISM DATA

Tourism data for Moray is limited and not always consistently presented, making long-term analysis and setting targets challenging.

STEAM Data

While STEAM (by Global Tourism Solutions) provides the most consistent available estimate of economic impact and enables comparison with other Scottish destinations, changes in indexing and presentation across years restrict direct trend analysis. Overall, the data suggests that tourism's economic value has increased since 2019, rising from around £134m to £189m in 2024, while employment has remained broadly stable at approximately 2,900 jobs, indicating higher value being generated per visit. This highlights both the constraints of the current evidence base and a clear

opportunity to strengthen Moray-specific data over time through more consistent local monitoring and shared intelligence.

VisitScotland Visitor Survey Data

Until relatively recently Moray data was aggregated with Aberdeen and Aberdeenshire. More recently this has been disaggregated although it is a relatively small sample size and does not readily reflect the known premium/international markets.

Two key insights from the VisitScotland Visitor Survey 2023 are that:

- Moray has the **2nd highest percentage domestic visitors at 84%** with Dumfries & Galloway highest at 87%.
- Moray has the **highest percentage repeat visits at 91%** followed by Ayrshire, Dumfries & Galloway at 89% and Borders at 88%

MORAY'S VISITOR ECONOMY PROFILE

Available data suggests a dominant domestic market but lived experience reveals that Moray's visitor economy and tourism performance is shaped by a **dual market**; exceptionally strong domestic loyalty paired alongside a selective but high-value international market.

Whisky, golf and story-rich premium experiences draw global visitors, while the wider region thrives on repeat local, Scottish and UK travellers who form Moray's dependable core. There is an important and unusual balance to be struck in Moray ensuring the needs of both are targeted, nurtured and optimised.

CORE MARKET 1 - Domestic, Repeat, Experience-Seeking

Moray's domestic dominance is one of its most defining characteristics. With among the **highest repeat-visit rates in Scotland**, the region attracts families, older couples, Scottish day visits and short-breakers including those visiting friends and relatives who value Moray for its scenery, peace, food, walking routes, coastline, microclimate, wildlife, authenticity and ease of access. The loyalty of this market shows strong emotional attachment, Moray *"feels familiar but still full of discovery"* it also highlights the need to refresh experiences to encourage longer stays, deeper engagement and stronger year-round visitation.

CORE MARKET 2 – Premium, International, Special Interest: Whisky, Golf, Country Sports

While domestic visitors dominate overall volume, Moray attracts a high-value international audience, particularly from North America and Europe. These visitors come primarily for Speyside whisky, premium golf, heritage and country sports activity, spending more per day and seeking curated, story-rich, small-group experiences and retail. Lived experience suggests this market is growing, yet under-realised due to fragmented itineraries, limited premium accommodation in Moray itself, poor transport infrastructure to remote rural locations and a lack of bookable and coordinated high-end products.

This duality punctuates this ten-year strategy recognising the importance of **nurturing both markets, and neither at the expense of the other**. Strengthening Moray's narrative, developing premium itineraries and deepening connections between global brands and local communities provide opportunities for sustainable growth.

GROWTH MARKETS

In parallel, and in addition, two growth markets are starting to shape and define Moray's visitor economy and require a conscious managed, balanced approach.

Independent and Touring Visitors, including campervans, motorhomes, road-trippers and active travellers, aligns well with Moray's roads and landscapes across the coast, Speyside and the Glenlivet–Tomintoul corridor. However, realising the benefits requires clear guidance, consistent visitor services and investment in parking, toilets, waste management, active travel, signage and responsible behaviour to ensure benefits are shared and pressure points avoided.

Business and Extended Stays are a steady and often under-recognised contributor to Moray's visitor economy, closely linked to major investment programmes, particularly in Elgin, Buckie and Keith. These stays support year-round accommodation demand and economic resilience, but also potentially displace visitors and their associated spend in the region. Better understanding and management of this market offers opportunities to balance capacity, support workforce planning and encourage leisure extensions and return visits with family - reinforcing the need for tourism growth in Moray to be infrastructure-led, responsible and supportive of community wellbeing.

MORAY'S DESTINATION COMPETENCE

Understanding the region's current competence as a destination allows the destination and the individual places within it to be properly understood, and capacity and capability to be used as a baseline and re- evaluated through lived experience.

Thirteen place-based appraisals of 20 competence criteria highlight the strengths and the catalysts for growth at a local and regional level, as well as where action is needed to be developed to address weaknesses. These appraisals are generated through local conversations with business and community interests at the table and gauge sentiment as well as aspiration.

Of note many of Moray's places have strengths in terms of tourism tradition, arts, culture and heritage, and wildlife and nature. These are exceptional building blocks for destination development, management and promotion and highlight that Moray has the core ingredients so doesn't need to create new attractions and reasons to visit. Energy needs to focus on developing compelling activities and experiences, ensuring inspiration and information is readily available online and in-destination, there is a clear narrative, and effort is focused on climate action, inclusion and accessibility. Collaboration within communities and between communities is lacking, as well as at a destination level and will be the key to growth.

Moray Press Pause® Destination Competency Appraisal 2025

An overview of the appraisals generated at each of the area workshops.

DESTINATION COMPETENCY CRITERIA	Tourism Tradition	Sense of Place outwith Moray	Physical Features and Attractions	Arts, Culture and Heritage	Wildlife & Nature	Visitor Activities & Experiences	Visitor Accommodation	Food, Drink & Refreshments	Events & Festivals	Makers & Producers	Travel & Connectivity	Retail Offer	Amenities & Infrastructure	Visitor Information & Signage	Digital Presence & Marketing	Climate Action	Inclusion & Accessibility	Community Assets	People & Players	Destination Collaboration
PLACES	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
ELGIN																				
FORRES																				
FINDHORN																				
LOSSIEMOUTH																				
BURGHEAD & HOPEMAN																				
BUCKIE																				
PORTGORDON PORTKNOCKIE & FINDOCHTY																				
CULLEN																				
FOCHABERS																				
KEITH																				
ABERLOUR																				
ROTHES AND DUFFTOWN																				
TOMINTOUL & GLENLIVET																				

Moray's Aggregated Press Pause® Destination Competency Appraisal 2025

CRITERIA	CURRENT COMPETENCY	OVERARCHING APPRAISAL AND PROSPECTS
Tourism Tradition		Deep-rooted hospitality and heritage tradition with a contrasting mix of coastal holiday parks fishing villages and traditional hunting, shooting, fishing, golf and whisky – however, not cohesive and under promoted
Sense of Place		Strong locally in general but fragmented regionally; several places and place names not well known or understood outwith the region; Moray is a relatively new entity and does not yet have a cohesive identity
Features & Attractions		A decent range of significant natural and built features of interest and attractions –under promoted and not joined up
Arts, Culture & Heritage		High quality and notable historic connections and experiences; active arts scene; current notable investment programme; under promoted
Wildlife & Nature		High quality coastal, river and woodland habitats with excellent trails and wildlife spotting opportunities; dark skies exceptional; under promoted
Activities & Experiences		Strong potential for varied water and land-based activities and emerging focus on agritourism experiences; weak coordination, packaging and visibility
Visitor Accommodation		Quality has been improving; notable holiday parks on coast; lost some self-catering units; limited luxury/ group options for travel trade; major impact on availability from demand for workers
Food & Drink		High quality local produce; extensive distillery related experiences; good daytime café culture; limited fine dining and evening options
Events & Festivals		Vibrant local community based events; some long-standing region-wide activity which is helps stimulate collaboration; lack of a joined-up calendar of events and programming
Makers & Producers		Good base across the region with art and food producers, NEOS annual event and a range of galleries and craft shops in towns and villages but overall lack of consistency
Travel & Connectivity		Patchy public transport for visitors to move around especially in rural areas; M-Connect has improved; good rail access in Elgin and Keith linking to Inverness and Aberdeen; very limited taxi options
Retail		Strong luxury shopping offer in a few locations; strong independent retail offer in smaller towns; Elgin lagging with several empty units in the centre
Amenities & Infrastructure		Good availability of basic services and amenities across the region. Visitor infrastructure is ageing and uneven across the towns; car park charging in some but not all locations; toilets are a key concern
Visitor Info & Signage		Universal frustration with inconsistency; several examples of community led visitor information provision filling gaps and offering potential; signage is generally poor and inconsistent
Digital Presence & Marketing		Some strong local platforms and individual business activity; major concern that VMS digital presence is still live but no longer proactively managed and its future is unknown
Climate Action		Mixed EV roll out, reliability and awareness – needs coordination; only some towns and communities have climate action plans; no entries on the Tourism Cares map; 20 Green Tourism accredited accommodation providers and attractions in Moray
Inclusion & Accessibility		Minimal all-access and inclusion provision/welcome; scope for region wide approach and collaborations/itineraries
Community Assets		Impressive volunteer led portfolio in key locations – eg Forres, Cullen, Findhorn and the Cabrach; less evident in other locations; significant potential
People & Players		Key locations enjoy dedicated, creative, resilient volunteer activity but fatigue issues evident in many communities; demise of VMS has left a vital leadership gap and opportunity
Destination Collaboration		Major structural gap especially since VMS closure; concern VMS model wasn't inclusive for community interests; collaboration within individual towns and communities is inconsistent and weak across Moray

OUR VISION

A STRATEGY FOCUSED ON PEOPLE, PLACES AND PURPOSE

Moray's tourism future is not about being louder, busier, or more commercial. It is about being truer to itself, clearer about what it stands for and more intentional in how tourism supports its people, places and landscapes.

VISION for Moray 2036

A collective ambition for Moray that translates into a coherent and collective direction of travel for the region's businesses, communities and strategic partners. After synthesising lived experience as expressed through local engagement and strategic analysis, the following vision reflects the tone, authenticity and aspiration of the people who engaged:

By 2036, Moray will be recognised as a leading example of place-based, community-powered, responsible tourism.

A place where outstanding global brands and local enterprise thrive together and tourism enriches local life, strengthens communities, enhances and celebrates nature and culture, and offers visitors meaningful experiences across all seasons.

This vision places Moray firmly within Scotland's wellbeing economy, but with a distinct local character built on relationships, stewardship, and local identity rather than volume, scale or "destination marketing" alone.

OUR MISSION

The mission for the next decade is:

To build a joined-up, inclusive and resilient visitor economy rooted in local identity, community involvement, meaningful local benefit and environmental stewardship, enabling every enterprise and place in Moray to contribute confidently to a shared story and shared prosperity.

OUR VALUES

This vision and mission reflect Moray's desire to be:

- **Balanced** — growing shoulder seasons, not summer pressure, encouraging dispersal across the destination, respecting local capacity and capability
- **Connected** — linking coast and mountains, whisky and culture, nature and towns into one living story
- **Fair** — offering fair work and ensuring communities, volunteers and small enterprises feel real benefit
- **Creative** — celebrating Moray's makers, languages, heritage and festivals
- **Caring** — protecting the landscapes, wildlife, coastlines and communities that define the region
- **Confident** — presenting a clearer, bolder narrative of who Moray is and connecting with our neighbouring destinations where visitors originate from

MORAY TOURISM 2036 GUIDING PRINCIPLES

Six principles translate Moray's shared values into practical behaviours that will guide decision-making, investment, product development and leadership over the next decade.

They reflect local lived experience while aligning with the national shift toward value-led, place-based and wellbeing-focused tourism set out in Scotland Outlook 2030 and related strategies.

MORAY'S GUIDING PRINCIPLES: SHAPING DECISIONS AND ACTION					
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
Connecting Moray's hidden assets with its global brands; linking place and people as one coherent destination.	Rooted in Moray's landscapes, 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 & visitors.
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 a 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.

1. A Joined-Up Place-Led Proposition

Tourism supports Moray's economic ambition and works best when it is connected and coherent rather than fragmented, linking coast, culture, whisky, nature and communities into a single proposition. A joined-up approach helps ensure that Moray's global strengths unlock opportunity, confidence and shared benefit.

POLICY ALIGNMENT: The coordination lens required to connect Moray's assets, communities and sectors into a coherent destination, supporting policy aims around partnership working, reduced duplication and place-led economic development, enabling Moray to function as one joined-up visitor economy.

Delivers against:

- **Scotland Outlook 2030** – Collaboration and Partnership, Thriving Places
- **The Place Principle (Scottish Government)**
- **Moray Economic Strategy**
- **Moray Growth Deal**
- **Local Place Plans & Community Planning Partnerships**

2. A Renewed Place Narrative

Moray benefits from a clear and consistent story that reflects who it is and how it feels to be here. Rooted in landscapes, people, culture and everyday life, this narrative should guide promotion, collaboration and experience development in ways that feel *local, lived and recognisable*.

POLICY ALIGNMENT: The importance of a distinct identity translates policy ambition into a shared narrative that communities, business and visitors recognise. It supports placemaking, cultural regeneration and responsible promotion, ensuring Moray's story is locally rooted and nationally distinctive.

Delivers against:

- **Scotland Outlook 2030** – Destination Positioning
- **VisitScotland Responsible Tourism & Brand Principles**
- **Scotland: The Perfect Stage** - Scotland's event strategy
- **Moray Local Development Plan and Local Place Plans**
- **Cultural, Heritage and Regeneration Strategies (local)**

3. A Confident Foundation for Enterprise and Prosperity

Tourism should provide an environment where enterprises can plan, invest and grow with confidence. Recognising Moray's diverse economy, support should encourage collaboration, innovation and long-term value across and between community organisations, micro-businesses, SMEs and global brands.

POLICY ALIGNMENT: Positioning the visitor economy as a contributor to inclusive growth rather than a standalone sector. It supports investment confidence, collaboration and long-term value creation across Moray's diverse business base. Delivers against:

- **Scotland Outlook 2030** - Diverse Businesses
- **National Strategy for Economic Transformation (NSET)**

- **Scotland: The Perfect Stage**
- **Moray Economic Strategy**
- **Moray Growth Deal**

4. A Wellbeing Economy Lens

Tourism plays a role in supporting Moray's wider wellbeing economy by balancing people, place and prosperity. Growth should strengthen fair work, skills development, local supply chains and pride of place, contributing positively to everyday life for those who live and work in Moray.

POLICY ALIGNMENT: Tourism contributes to outcomes beyond visitor numbers, supporting fair work, skills, local supply chains and pride of place. This principle directly links tourism to wellbeing, resilience and community benefit priorities across Moray. Delivers against:

- **Scotland Outlook 2030 - Passionate People**
- **Scotland's Wellbeing Economy Agenda**
- **Fair Work Framework (Scotland)**
- **Moray Economic Strategy**
- **Community Planning & Health and Wellbeing Strategies**

5. Communities as Partners, Not Spectators

Communities are already central to Moray's visitor experience and should remain active partners in shaping its future. Tourism should be developed with communities, recognising the contribution of volunteers, charities and social enterprises and ensuring benefits are visible and locally meaningful.

POLICY ALIGNMENT: Operationalise community empowerment policy by embedding communities, volunteers and social enterprises as active partners in tourism. Supporting shared decision-making, local benefit and sustainable volunteer capacity, aligning tourism and visitor economy enterprise with community-led development. Delivers against:

- **Scotland Outlook 2030 – Community-led tourism, Memorable Experiences**
- **Community Empowerment (Scotland) Act**
- **Local Place Plans**
- **Moray Community Planning Partnership priorities**
- **Third Sector and Volunteering Strategies**

6. Stewardship First

Tourism growth needs to be considered, responsible and well-paced. Investment in essential infrastructure and environmental stewardship should come before increased promotion, ensuring tourism respects local capacity, landscapes and long-term resilience.

POLICY ALIGNMENT: Ensuring tourism growth is aligned with climate action, environmental stewardship and infrastructure readiness. It supports policy objectives around resilience, nature recovery and infrastructure-first investment, ensuring tourism works for residents, visitors and place.

Delivers against:

- **Scotland Outlook 2030** – Thriving Places, Responsible Tourism, Net Zero
- **Scotland's Climate Change Plan & Biodiversity Strategy**
- **Moray Climate Change, Forestry and Woodland, Biodiversity and Infrastructure Strategies**
- **Active Travel and Sustainable Transport Strategies (national and Moray Routes)**
- **Rural Tourism Infrastructure Fund principles**

WHAT SUCCESS LOOKS LIKE IN 2036

By 2036, success for Moray's visitor economy is defined by confidence, connection and shared benefit rather than scale or volume. Moray is recognised as a coherent, place-led destination, connected through a clear and authentic shared narrative.

A lean, inclusive and trusted coordination model enables collaboration across businesses, communities and partners, supporting confident enterprise, stronger local supply chains and clearer pathways to support. Communities experience visible social, cultural and economic benefit from tourism, with volunteer effort and community leadership recognised, supported and sustained.

Investment in infrastructure, visitor management and digital visibility has improved everyday experience for residents and visitors, reducing pressure points and strengthening year-round value. Visitors are encouraged to stay longer, explore more widely and engage more deeply, while tourism contributes meaningfully to fair work, skills development and youth opportunity.

Growth is measured, responsible and climate-aware, supporting nature recovery, place stewardship and long-term resilience. And Moray has a confident voice within Scotland's tourism landscape as a practical example of community-powered, place-based tourism that works for people, place and prosperity.

MORAY'S STRATEGIC PILLARS

A joined-up structure for a confident place-based and community-powered destination.

The next decade requires Moray to shift from fragmented, goodwill-driven effort toward a coordinated, collaborative and place-based model of destination stewardship. Engagement made it clear that Moray's success will depend on joining up what already exists, respecting the duality of the market, strengthening the basic building blocks of the visitor experience, and establishing leadership that reflects the region's diverse voices.

This strategy is built on **six strategic pillars**, each developed from our guiding principles and aligned closely with Scotland Outlook 2030.

MORAY'S PILLARS FOR ACTION:					
Leadership & Coordination:	Identity, Brand & Promotion:	Enterprise & Investment:	Community Benefit & Resilience:	Visitor 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 connection 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.

	Pillar	Purpose	Early Priorities	Outcome by 2036
1	Leadership & Coordination	Rebuild inclusive, trusted destination leadership.	Establish Tourism Leadership Group; interim coordination team; strategic partnerships.	A sustainable, community-rooted destination body with clear accountability.
2	Identity, Brand & Promotion	Create a clear, shared narrative for Moray.	Agree core story; stabilise digital presence; unified events calendar.	A confident, coherent identity consistently communicated by all.
3	Enterprise & Investment	Enable local enterprise to grow with confidence and purpose.	Support bookable experiences; strengthen local supply chains; skills and fair work focus.	A resilient, diverse visitor economy rooted in local benefit.
4	Community Benefit & Resilience	Ensure tourism strengthens everyday life in Moray.	Community-led priorities; small-scale enabling investments; volunteer support.	Visible social, cultural and economic benefit for communities.
5	Visitor Experience & Dispersal	Shape responsible, year-round visitor experiences.	Develop themed clusters; improve information and wayfinding; encourage longer stays.	Longer stays, wider dispersal and deeper visitor engagement.
6	Environment & Infrastructure	Protect place while enabling responsible access.	Improve core infrastructure; visitor management; climate-aware investment.	Healthy environments, reduced pressure points and long-term resilience.

PILLAR 1 — Leadership & Coordination

A light-touch, inclusive, enabling model that reconnects and drives Moray

Purpose

To rebuild confidence, cohesion and clarity by establishing a destination coordination structure that reflects the whole region; businesses, communities, land managers, culture organisations, global brands and agencies, and provides the glue that Moray currently lacks. Stakeholders were unequivocal: without coordination, Moray cannot progress. 88% called for a new leadership and collaborative model.

What Success Looks Like

- Clear leadership recognised and trusted across sectors.
- A coherent digital presence and unified narrative.
- Information flows easily between communities, businesses and agencies.
- Collaboration becomes the norm, not the exception.
- A 2-year transition period results in a sustainable delivery model and enables interim marketing and collaborative product development

Priority Objectives

1. Establish an Interim Tourism Leadership Group (TLG)

- Representing key sectoral interests.
- Charged with designing a long-term model to build and maintain momentum.
- Supported by development, marketing and coordination resource.

2. Recruit an interim destination development team

To coordinate the players and champion early action. Roles to include;

- Marketing and digital presence
- Stakeholder engagement and coordination
- Destination and product development

3. Formalise a Moray Strategic Tourism Partnership

- Representation from the interim TLG, Moray Council, VisitScotland, Business Gateway, HIE, Moray Chamber of Commerce, Federation of Small Business

4. Stabilise and relaunch Moray's digital front door

- Reclaim existing web assets and social channels.
- Publish a unified events calendar and destination listings for places, businesses, features and attractions.
- Provide practical visitor information, itineraries and local insights.

5. Develop and support engagement in established collaborative platforms to create further marketing and product development initiatives

Building on and celebrating Moray's core strengths and assets, and existing successful festival and outdoor activity;

- Spirit of Speyside: whisky, food and drink.
- Moray Outdoor & Walking Festival, long distance trails.
- Findhorn Bay Arts Festival, Speyfest, MacMoray and NEOS
- The North East 250 Touring Route, Castle and Pictish trails, The Moray Way
- Connecting Golf and premium sports with Moray experiences

6. Create and nurture regular forums for sector and place collaboration

Sector Forums:

- Whisky, Food & Drink
- Attractions, Events & Festivals
- Sports and the Great Outdoors
- Arts, Culture and Heritage

Place- based Forums, eg Forres, Cullen,

These become the destination's cross-sector engine rooms.

7. Develop the long-term destination leadership model

- Inclusive, low-barrier, transparent.
- Blends paid coordination with community stewardship roles.
- Avoids exclusion through levy-based or pay-to-play structures.

8. Improve communication across the system

- Annual industry networking event
- Quarterly destination briefings.
- Simple, accessible updates.
- Clear two-way channels between agencies, industry and communities.
- Networking & socialisation through webinars, roadshows & learning journeys

PILLAR 2 — Identity, Brand & Promotion

A compelling narrative that ties Moray's places and assets together to inspire responsible visits that resonate and connect.

Purpose

To create a clear, distinctive identity that reflects Moray's essence, its contrasts, its communities, its everyday beauty and provides visitors with a coherent story to explore. Stakeholders said clearly: Moray's current narrative feels generic; they want a story that "could only be Moray."

What Success Looks Like

- Visitors understand what Moray stands for.
- Communities see themselves in the story.
- Whisky and golf act as global anchors connected to wider experiences.
- Towns and villages gain visibility beyond traditional hotspots.
- Digital channels reflect a unified story, not fragmented content.
- Film and TV locations reinforce the sense of place and provide intrigue

Priority Objectives

1. Co-create a Moray-wide narrative and brand toolkit

- Led by the TLG with community and business involvement.
- Rooted in identity: coast, Scots language, whisky, forests, food, creativity, dark skies and everyday Moray life.
- Coordinate with Moray based businesses and platforms (global and local) to utilise the toolkit and realign with the new narrative and assets

2. **Create bookable, themed itineraries and trails**

- Coast-to-Glen journeys
- Pictish & Heritage trail
- Food & Drink / Agritourism circuits
- Whisky villages and storytelling experiences
- Wildlife & Nature routes

These provide a joined-up regional offer.

3. **Rebuild digital visibility**

- Coordinate digital content with global brands in Moray for AI optimisation
- Search optimisation, itineraries, tools, maps, listings.
- Coordinated social content using local creators.
- A single, accurate “What’s On” platform.

4. **Improve on-the-ground visibility**

- Regional signage plan
- Digital-linked interpretation
- Accessible, consistent wayfinding

5. **Promote year-round stories**

- Spring & Autumn colours: wildlife, marine life, birdlife migration, coastal winter light, dark skies & auroras, heritage, wellbeing, festivals and food to support seasonal balance and local resilience.

PILLAR 3 - Enterprise & Investment

An inspirational framework to support Moray's enterprises, people and places to grow with confidence and purpose.

Purpose

To position the visitor economy as a catalyst for inclusive, place-based economic growth by enabling enterprises to grow with intention, attract the right investment and maximise the value of Moray’s people, places and assets.

Moray’s Economic Strategy highlights the need to strengthen productivity, attract investment, retain talent and diversify opportunity. A well-managed visitor economy plays a critical role in delivering this ambition. Tourism is not a standalone sector; it connects and supports hospitality, food and drink, culture, land management, nature recovery, retail, transport, creative industries and placemaking, contributing to skilled jobs, local ownership, year-round activity and reinvestment across Moray’s towns, villages, land and seascapes.

Moray is also home to several globally recognised brands whose visitor-facing activity sits alongside wider commercial operations. There is an opportunity to better integrate these visitor experiences into the wider destination economy through collaboration, shared storytelling and stronger local connections, creating mutual value for communities and complementary enterprises and the brands themselves.

This pillar recognises that tourism enterprise operates within a wider economic and place-based system and is most effective when aligned with existing partner-led initiatives and investment across Moray. By strengthening collaboration and clarity, tourism can amplify the impact of work already underway rather than duplicating or competing with it.

Taken together, this pillar focuses on creating the conditions for a resilient, diverse and values-led visitor economy, supporting enterprises to innovate and grow in ways that strengthen local people, respect place and its traditions, and maximise the long-term value of both existing and future assets.

What Success Looks Like

- Tourism is recognised as a key economic sector contributing to inclusive growth, skills development and cultural place-based sustainable investment.
- A resilient enterprise ecosystem spanning community organisations, third sector, micro-businesses, SMEs and global brands.
- Higher-value activity increases spend per visitor, length of stay and year-round economic impact.
- Investment is better aligned with Moray's identity, communities and long-term economic goals.
- Local people benefit through employment, enterprise opportunities and stronger local supply chains.
- Existing assets — natural, cultural, built and intangible — are better used, cared for and interpreted.
- New and existing businesses find it easier to start up, collaborate, innovate and grow responsibly.

Priority Objectives

- 1. Strengthen enterprise support around people, place and assets**
Align tourism enterprise support with local skills, workforce needs and fair work principles and long-term economic resilience.
Enable businesses to build place-based offers that make better use of Moray's existing assets; heritage, land, food, culture and events (before creating new).
- 2. Support diverse business models to thrive**
Recognise and value the full mix of enterprise models: community trusts, charities, social enterprises, micro-businesses, SMEs and global brands.
Ensure support mechanisms are inclusive, accessible and relevant to small and seasonal operators as well as premium and international businesses.
Encourage collaboration rather than competition across sectors and scales.
- 3. Improve pathways to investment and finance**
Simplify and clarify routes to funding, investment and business support through a more coordinated, visible approach.
Encourage blended finance and investment models that deliver long-term local value rather than short-term or extractive returns.
- 4. Develop Moray's experience and product base**
Support the development of bookable, high-quality, collaborative experiences aligned with Moray's narrative and year-round potential.

Encourage innovation through targeted mentoring, skills development and peer-to-peer learning, particularly for start-up and micro-enterprises.

5. Anchor premium and global brands into the wider Moray economy

Encourage global brands in whisky, golf, retail and premium markets to play an active role in destination stewardship and collaboration.

Strengthen links between premium anchor experiences, local supply chains, communities and complementary local enterprises.

6. Embed responsible and regenerative business practice

Support businesses to adopt climate-positive, inclusive and community-benefit practices appropriate to their scale and context.

Align enterprise development with Scotland Outlook 2030, fair work principles and wellbeing economy outcomes, recognising positive contribution to people, place and planet.

PILLAR 4 - Community Benefit & Resilience

Meaningful connection between visitors, communities and enterprise empowering Moray's people and places to flourish.

Purpose

To ensure tourism is clearly linked to community priorities, improving local facilities, celebrating local culture and heritage, supporting fair work, and reinvesting in the services and spaces that underpin quality of life.

Community benefit was consistent across all engagement:

“Tourism should support local life, not rely on it.”

What Success Looks Like

- Community priorities shape tourism decisions.
- Volunteer effort is recognised, supported and sustainable.
- Revenue flows visibly back into towns and villages.
- Fair work and year-round skills pathways strengthen the workforce.
- Tourism supports public services and pride of place.

Priority Objectives

1. Embed community priorities into tourism planning

Use Local Place Plans and community action plans as baseline evidence.

Identify shared issues across Moray (transport, public realm, youth spaces).

2. Create a “Tourism Enablers Fund”

Small-scale grants for communities, events, maps, trails, signage, volunteer coordination, and local facilities (toilets, gardens, small improvements).

3. Strengthen community-led tourism models

Support asset transfers, local interpretation, and events.

4. Embed visitor donation schemes tied to community run services (e.g. toilets).

5. Improve employment quality and skills

Encourage annualised hours, fair pay, youth training and digital skills.

Connect businesses with UHI Moray and (Developing the Young Workforce (DYW) for talent pathways i.e. Chef training

6. Measure community benefit

Track local spend, volunteer hours, infrastructure improvements and community satisfaction.

Use data to guide reinvestment and transparency.

PILLAR 5 - Visitor Experience & Dispersal

Shaping Moray's visitor offer to support responsible growth, dispersal and year-round value.

Purpose

To strengthen Moray's visitor experience by developing and promoting the right mix of markets, products and experiences that reflect local identity, build confidence across the region and increase value throughout the year.

Unlike high-pressure destinations, Moray's challenge is not over-concentration or extreme seasonality, but ensuring visitors are encouraged to explore more widely, stay longer and travel throughout the year, engaging more deeply with the region's full range of places, stories and enterprises. This pillar focuses on experience-led growth that spreads opportunity, builds resilience and supports responsible tourism in practice.

What Success Looks Like

- Visitors have clear reasons to explore different parts of Moray through connected, well-presented experiences.
- Experiences are higher quality, bookable and connected across the region.
- Whisky, golf and premium anchors help unlock wider discovery rather than standing alone.
- Year-round visitation is strengthened, particularly in shoulder and quieter periods.
- More local businesses, especially micro-enterprises, participate confidently in the visitor economy

Priority Objectives

- 1. Focus on the right markets and experience strengths**
 - Align experience development and promotion with Moray's priority markets, emphasising quality, curiosity and respect for place rather than volume.
 - Prioritise experiences that reflect Moray's strengths: coast, whisky, food and drink, culture, heritage, outdoors, nature and wellbeing.
- 2. Develop high-quality, bookable experiences across the region**
 - Support the creation of bookable experiences that connect food, culture, craft, nature and storytelling.
 - Enhance whisky and golf offers beyond standard formats, linking them to each other and to place, people and complementary Moray experiences.
- 3. Strengthen outdoor, cultural and heritage experiences**
 - Develop trails, routes and themed journeys (coastal, forest, river, heritage and culture) that encourage exploration and longer stays.

- Improve interpretation and storytelling, including maker, music, language and community-led heritage experiences.
4. **Build enterprise capability for experience-led growth**
 - Provide training, mentoring and peer learning to help businesses design, price and deliver high-quality experiences.
 - Enable micro-enterprises and start-ups to participate in experience development and become market-ready.

PILLAR 6 - Environment & Infrastructure

Strategic investment that enables connectivity and protects place and the planet.

Purpose

To improve the quality, accessibility and sustainability of the visitor experience by investing in essential infrastructure, protecting natural and cultural assets, and improving connectivity for residents and visitors alike.

Engagement was unequivocal: *“Infrastructure first.”*

78% of survey respondents prioritised toilets, parking, signage and transport as critical foundations for a healthy visitor economy.

What Success Looks Like

- Visitors find it easy to move around and navigate Moray and easier to include within Scottish tour itineraries
- Communities experience less pressure at peak times.
- Natural, outdoor and heritage assets are well managed and protected.
- Motorhome and campervan activity is planned, managed and beneficial.
- Infrastructure investment supports both residents and visitors.

Priority Objectives

1. **Prioritise essential visitor infrastructure**
 - Where possible invest in toilets, parking, signage, lighting, benches, accessible paths and EV charging.
 - Develop a clear tourism infrastructure pipeline aligned with Moray Council capital programmes and review potential reinvestment through viable visitor schemes such as a Transient Visitor Levy and/or visitor payback/donation schemes.
2. **Improve sustainable transport and connectivity**
 - Strengthen links to and from Aberdeen–Inverness rail stations and airports and key gateways.
 - Support M-Connect communications and connectivity for visitor and local use.
 - Improve coordination around events, hotspots and seasonal pressure points.
 - Integrate active travel into visitor routes and itineraries.
3. **Protect and manage outdoor and heritage assets**
 - Introduce and develop ranger and visitor management models in partnership with estates and communities.
 - Improve facilities for accessibility and inclusivity.
 - Plan for responsible access, motorhome management and environmental capacity.

How the Pillars Work Together

These six pillars are interconnected and mutually reinforcing:

- 1. Leadership & Coordination** provides the structure, trust, shared direction and momentum needed for collective action.
- 2. Identity, Brand & Promotion** gives Moray a clear, confident voice rooted in its people, places and assets.
- 3. Enterprise & Investment** translates opportunity into inclusive economic value, supporting resilient businesses and skilled jobs.
- 4. Community Benefit & Resilience** ensures tourism strengthens local wellbeing, services and pride of place.
- 5. Visitor Experience & Dispersal** focus Moray's offer on distinctive assets and the right markets, and develops high-quality, bookable experiences that reflect its strengths.
- 6. Environment & Infrastructure** provides the essential foundations, access, connectivity, protection and capacity that allow tourism to function sustainably for residents and visitors alike.

Together, the pillars create a value-led, place-based and community-powered visitor economy that supports Moray's wider economic ambitions, aligns with national policy, and remains firmly rooted in local identity, stewardship and long-term resilience.

These six pillars are the foundations for our strategic delivery framework.

MORAY'S DESTINATION NARRATIVE AND COMPELLING OFFER

A CONNECTED STORY OF PEOPLE, PLACES AND PURPOSE.

A successful destination narrative is not a slogan. It is a shared story that communities recognise, visitors feel, and partners can rally behind. It expresses the **truth** of a place, its identity, its contrasts, its everyday reality, and its deeper spirit. It underpins all future marketing and branding work.

Across Moray's engagement, people repeatedly asked for a narrative that:

- feels **real** and **locally rooted**
- moves beyond whisky alone
- connects coast, culture, towns, forests, makers and heritage
- gives visibility to the "forgotten places"
- unites communities without flattening their individuality

- celebrates Moray’s strengths without overclaiming
- reflects Moray’s warmth, pride and authenticity
- articulates the **quiet confidence** that people feel but rarely state

MORAY’S CORE NARRATIVE

A draft for validation with communities and a new Tourism Leadership Group

***“Moray isn’t loud – it whispers.
But if you listen closely,
it tells the kind of story that stays with you...”***

Moray is a place of connection. Where coast meets mountain, farm meets forest, heritage meets creativity, and community spirit shapes every welcome. Visitors come for beaches, whisky, wildlife, golf, and history, but stay for something deeper: a feeling of belonging and the quiet authenticity of everyday Moray life.

From fishing towns to whisky villages, Pictish stones to creative makers, dark skies to vibrant festivals, Moray offers meaningful experiences in a region small enough to explore and rich enough to surprise. This is a place kept alive by its people; makers, storytellers, hosts and volunteers who care about what they do.

Moray is not Scotland’s loudest destination and that is part of its charm. It is a place to slow down, explore gently and return often. A place where people, nature and culture flourish together.

What this narrative reflects:

- Moray’s diversity and cohesion
- people as much as assets
- calm, unpretentious beauty
- an invitation rather than a performance

MORAY’S TONE OF VOICE

A narrative is only as strong as its delivery. Stakeholders described the tone they want Moray to embody:

- **Warm & Welcoming**
Friendly, open, rooted in the community spirit that visitors repeatedly praise.
- **Confident but Humble**
Proud of its assets, yet not boastful; a quiet excellence echoed in the region’s landscapes, whisky craft and community care.
- **Authentic & Grounded**
Celebrate real stories — fishermen, makers, distillers, volunteers, local historians, rangers and residents.
- **Connected & Inclusive**
Showcase all parts of Moray equally, not only the high-profile places.
- **Mindful & Responsible**
Reflect Moray’s values around stewardship, sustainability and year-round balance.
- **Creative & Characterful**

Highlight the arts, language, festivals, and expressive spirit seen across communities. This tone should shape all future communications, itineraries, digital content, and interpretation.

MORAY'S IDENTITY

Engagement revealed six themes that define Moray's identity. These themes structure how the narrative can be applied across experiences, marketing, community work and product development.

- **Coast & Big Skies**
Expansive beaches, dramatic geology, dolphin-rich waters, harbours and sunsets.
Identity: **open, elemental, calming, restorative**
- **Forests, Glens & Dark Skies**
Paths, wildlife, tranquillity, night skies, active adventures, wellbeing.
Identity: **wild, peaceful, spirited, reflective**
- **Whisky, Food & Craftsmanship**
Global icons blended with local makers, bakers, brewers, farmers and artisans.
Identity: **crafted, skilled, world-class yet local**
- **Heritage & Stories of Place**
Pictish stones, medieval cathedrals, fishing history, Scots language, resilient communities.
Identity: **storied, rooted, multi-layered**
- **Creative Culture, Festivals & Everyday Life**
Music, dance, arts, local talent, village events and volunteer-led celebrations.
Identity: **playful, expressive, community-powered**
- **Community Spirit & Local Pride**
Community run toilets, heritage and information centres, gardens and "tidy towns".
Identity: **caring, collaborative, everyday excellence**

Any future storytelling, itineraries or branding should reference these pillars to ensure coherence and authenticity. A key development will be for platforms that currently feature Moray to realign content to reinforce this identity.

THE MORAY VISITOR PROMISE

"In Moray, you'll find open landscapes, endless seascapes, authentic experiences and a warm community welcome - with the time and space to enjoy them at your own pace."

PRIORITY MARKETS

Research revealed Moray currently experiences a dual market - exceptionally strong domestic loyalty paired alongside a selective but high-value international market. Both are important for different reasons and segmenting the market ensures their different needs and wants can be targeted.

Moray's future is not about attracting *more* visitors for the sake of it, but the right visitors, at the right times, those who support community wellbeing, spend locally, travel respectfully, and strengthen the shoulder seasons. Engagement evidence shows a clear preference for value-led rather than volume-led tourism, aligning with Moray's emerging narrative of slow, meaningful and community-powered travel.

Moray's Dual Market

Available data tells us Moray's visitor economy is shaped by strong domestic demand, high levels of repeat visitation and deep emotional attachment to place. Visitors are drawn by Moray's coastline, towns, villages and countryside, food and drink, walking routes, heritage and sense of calm. Lived experience also tells us that Moray attracts a premium international market, particularly connected to whisky, golf, country sports and high-quality, experience-led travel. This dual profile creates an opportunity to focus less on volume and more on value, quality and year-round local benefit.

MORAY'S DUAL MARKET PROFILE

Core Market 1 (Volume) Domestic, Repeat, Experience Seeking	Core Market 2 (Value) Premium, International - Whisky, Golf, Retail
Demographics: Families Couples Visiting Friends & Relations Traits: High Loyalty Repeat Visits Values: Scenery authenticity Opportunities: longer Stays, deeper engagement	Demographics: North America Europe Traits: High Spend Low volume Values: Whisky Golf Heritage Sport Curated Experiences Opportunities: Premium itineraries, accommodation, connectivity

FOUNDATION INSIGHT: WHO MORAY SHOULD PRIORITISE

Across the survey, the top visitor types seen as **most valuable and realistic** were: *Families & Older Couples, Active / Nature-Based Visitors, Domestic Short-Break Visitors, Whisky, Food & Culture Enthusiasts, Golf Visitors, Motorhome / Touring Visitors, High-Spending International Visitors, Wellbeing & Slow-Travel Visitors*

These match the lived insights from workshops, where stakeholders emphasised:

- a move toward *experience-led travel*
- a desire to build *autumn and spring markets*
- concern about *high-impact summer peaks*

- the need for *responsible touring* and better motorhome management
- an interest in *premium, small-group, story-rich experiences*

OUR STRATEGIC PRIORITY SEGMENTS (2025–2036)

The following **four priority clusters** reflect the duality of Moray’s current visitor profile and local aspirations and national opportunity. These are not rigid categories but flexible groups that align with Moray’s assets and appeal, identity, infrastructure capacity and community wellbeing goals.

	Segment	Profile	Traits	Values	Opportunities for Moray
Priority Segments	Slow Adventurers	Domestic & short-haul visitors seeking slower-paced, low-impact travel.	Curious, reflective, repeat led.	Tranquillity, authenticity, wellbeing.	Longer stays, shoulder-season travel, dispersed exploration.
	&				
	Nature Seekers	Visitors drawn by wildlife, coast, rivers, dark skies and outdoors.	Low-impact, environmentally aware.	Biodiversity, scenery, responsible access.	Off-peak demand, ranger services, stewardship-led experiences.
	Families & Multi-Generational	Domestic & regional family groups, often Visiting Friends and Relatives (VFR) -led.	High loyalty, practical planners.	Safety, accessibility, shared experiences.	Year-round value, strong towns & community facilities.
	Culture & Heritage Explorers	Visitors motivated by history, archaeology, arts & festivals.	Curious, learning driven.	Storytelling, authenticity, place.	Deeper engagement, longer dwell time, cultural programming.
	Premium International	High-value, low-volume visitors (North America, Europe).	Planned itineraries, high spend.	Quality, provenance, curated experiences.	Premium itineraries, bookable experiences, local supply chains.
	&				
	Specialist Interest	Purpose-driven travel (whisky, golf, fishing, country sports).	Knowledgeable, repeat potential.	Depth, expertise, access.	Specialist products, guides, small-scale operators.
Responsible / Balanced Growth Segments	Touring Visitors	Visitors passing through Moray within wider Scottish itineraries.	Short stays, flexible plans.	Ease, clarity, memorable stops.	Convert pass-through to overnight stays.
	Business & Extended Stay	Business workers temporarily based in Moray and events & training visitors extending stays.	Midweek travel, leisure interests, repeat visits.	Convenience, quality, local offer.	Shoulder-season demand, town and village-based spend.

A. Slow Adventurers & Nature Seekers

Who they are:

Walkers, cyclists, tourers, wildlife watchers, forest explorers, dark-sky enthusiasts, paddleboarders, and nature photographers.

Why they fit Moray:

Moray offers an exceptional blend of coast, beaches, forest, rivers and wildlife, quiet, accessible, uncrowded, and year-round. Long distance trails, Moray Outdoor & Walking Festival Engagement showed that outdoor activity is one of Moray's most under-leveraged strengths.

Seasonality:

Ideal for March–June and September–November markets, exactly where communities want growth.

Needs:

- Trails, signage, safe paths
- Parking, toilets, waste disposal, wayfinding
- Guided experiences and equipment hire
- Responsible behaviour prompts

Narrative connection:

Coast & Big Skies, Forests & Glens, Wellbeing & Slower Pace

B. Families & Multi-Generational Visitors

Who they are:

Local Scottish families, UK families, grandparents with children, repeat regional visitors.

Why they fit Moray:

Safe towns and villages, quiet coastlines, holiday parks, accessible walks, wildlife, food and drink, castles, Scottish Dolphin Centre, Outfit Moray and good accommodation variety. Engagement revealed 'visiting friends and relatives' as a particularly strong market in Moray

Seasonality:

Shoulder seasons for short breaks; coastal summer remains popular but requires careful management.

Needs:

- Clear itineraries
- Wet-weather options
- Improved family facilities (toilets, signage, buggy-friendly routes)
- Accommodation availability
- Affordable local experiences

Narrative connection:

Welcoming Communities, Heritage & Stories, Creative Culture

C. Culture & Heritage Explorers

Who they are:

Visitors motivated by built and cultural heritage features and attractions - whisky, art, language, music, festivals, food, craft and storytelling.

Why they fit Moray:

Speyside's global reputation, Pictish stones, Elgin Cathedral, Keith's Scots Toun identity, castles and museums, coastal heritage and harbours plus vibrant local festivals and creative life. Workshops highlighted huge gaps in connecting and promoting this richness.

Seasonality:

Year-round, with strong potential in autumn/winter (festivals, distillery tours, creative workshops).

Needs:

- Trails (heritage, craft, food, whisky)
- Interpretation
- Maker experiences
- Events calendar
- Bookable cultural experiences

Narrative connection:

Heritage & Stories, Craftsmanship, Creative Culture

D. Premium International & Specialist Interests

Who they are:

High-spending whisky visitors (US, Europe), golfers, gourmet travellers, small-group luxury markets.

Why they fit Moray:

These markets already recognise and value Speyside and links golf, but are seeking higher-quality, story-rich and personalised experiences, an identified gap in the current market.

Seasonality:

Strong year-round potential; affluent visitors less influenced by weather and school holidays.

Needs:

- Premium bookable product
- Airport connections
- Concierge-style itineraries
- Distillery-community links
- High-quality accommodation

Narrative connection:

Craftsmanship, World-Class yet Local, Depth of Experience

RESPONSIBLE AND BALANCED GROWTH SEGMENTS

Two further segments are important to Moray as they are already prevalent but do require further understanding and careful management to ensure benefit outweighs impact.

E: Motorhome & Touring Visitors

A fast-growing market providing strong shoulder-season value but requiring improved infrastructure, management and communication to reduce local pressures.

Engagement called for:

- designated stopovers
- clearer guidance
- visitor education
- consistent parking policies
- waste management
- local spend opportunities

F: Business Stays

Work related overnight stays and long-term multi-day repeat stays. A key year-round economic driver, especially in Moray's towns with current infrastructure investments. Risk of displacing visitor stays and associated spend.

Opportunities:

- converting business trips into leisure extensions
- connecting work related stays with wellbeing and leisure opportunities – eg gym membership
- differentiate weekday business worker and weekend visitor offers
- improved mid-range accommodation options

MARKET DEVELOPMENT PRIORITIES (2025–2036)

1. Develop Moray themed trails
2. Grow shoulder-season activity (March–June, Sept–Nov)
3. Strengthen year-round bookable experiences
4. Improve accessibility, inclusion and family-friendly product
5. Build premium and specialist joined up experiences
6. Strengthen touring and motorhome itineraries and management
7. Elevate cultural and creative Moray

SUMMARY: A VALUES-LED MARKET SEGMENT STRATEGY

Moray's future visitor economy is centred on building Moray's dual market with an emphasis on:

- value not volume
- shoulder-season strength
- meaningful experiences
- book ability and visibility
- premium and specialist value
- community benefit and environmental balance
- segments that align with Moray's identity, capacity and ethos

This creates a clear direction for product development, infrastructure investment and marketing over the decade ahead.

MORAY'S STRATEGIC FRAMEWORK FOR DELIVERY

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

A delivery framework is provided for early collaboration, and as the basis for impactful actions that build on strong event, festival and trail assets which already engage multiple players and can readily support further and wider collaboration. These celebrate some of Moray's key assets and provide a platform for developing the narrative.

Pillar 1, Destination Leadership and Coordination is driven by two delivery frameworks, the first of which embodies five delivery charters to guide the crucial next steps in establishing destination leadership and providing the structure for successful delivery of this strategy to 2036. There is one delivery framework each for Pillars 2-5 and Pillar 6 has two frameworks covering the different aspects of infrastructure and the environment.

These frameworks are designed to translate the strategic direction of this strategy into easily implemented action on the ground and to ensure everyone can engage with and be part of delivering this strategy.

Crucially, Moray is at an important juncture and requires a new style of destination leadership and much greater collaboration across the destination if the potential that clearly exists is to be realised.

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 a related purpose and therefore could provide the basis to kick start 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, engage with industry, provide basic admin support
 - a Digital Marketeer to develop and manage the digital assets and digital content
 - a Destination development Manager to progress product development/collaborations

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

“The first step towards success is taken when we refuse to be a captive of the environment in which we first find ourselves.”

Mark Caine, Analyst-Strategist

GLOSSARY

This glossary provides a list of acronyms and abbreviations used within, or relevant to, the Moray Tourism 2036 strategy and its delivery. For ease of reference, acronyms and abbreviations are listed alphabetically.

Acronym	Meaning
AI	Artificial Intelligence
ASSC	Association of Scottish Self Caterers
ASVA	Association of Scottish Visitor Attractions
BG	Business Gateway
BID	Business Improvement District
CBA	Community Benefit Agreement
CNPA	Cairngorms National Park Authority
DMMO	Destination Marketing and Management Organisation
DMO	Destination Marketing Organisation; sometimes also referred to as Destination Management Organisation
DYW	Developing the Young Workforce
EV	Electric Vehicle
FSB	Federation of Small Businesses
HIE	Highlands and Islands Enterprise
KPI	Key Performance Indicator
LDP	Local Development Plan
MC	Moray Council
MEP	Moray Economic Partnership
NC500	North Coast 500
NE250	North East 250
NEOS	North East Open Studios
NSET	National Strategy for Economic Transformation
QR	Quick Response code (a type of 2D barcode)
RAF	Royal Air Force
RTIF	Rural Tourism Infrastructure Fund
SCOTO CIC	Scottish Community Tourism Network – a Community Interest Company
SEO	Search Engine Optimisation
SME	Small and Medium-sized Enterprise
SOAC	Scottish Outdoor Access Code
SO2030	Scotland Outlook 2030 (Scotland’s national tourism strategy)
STA	Scottish Tourism Alliance

STEAM	Scottish Tourism Economic Activity Monitor; sometimes also referred to as Scarborough Tourism Economic Activity Monitor
STP	Strategic Tourism Partnership
TLG	Tourism Leadership Group
UHI	University of the Highlands and Islands
UK	United Kingdom
UKSPF	UK Shared Prosperity Fund
UN	United Nations
USP	Unique Selling Point
VFR	Visiting Friends and Relatives
VMS	Visit Moray Speyside
VS	VisitScotland
WTTC	World Travel & Tourism Council



Moray Tourism 2036

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