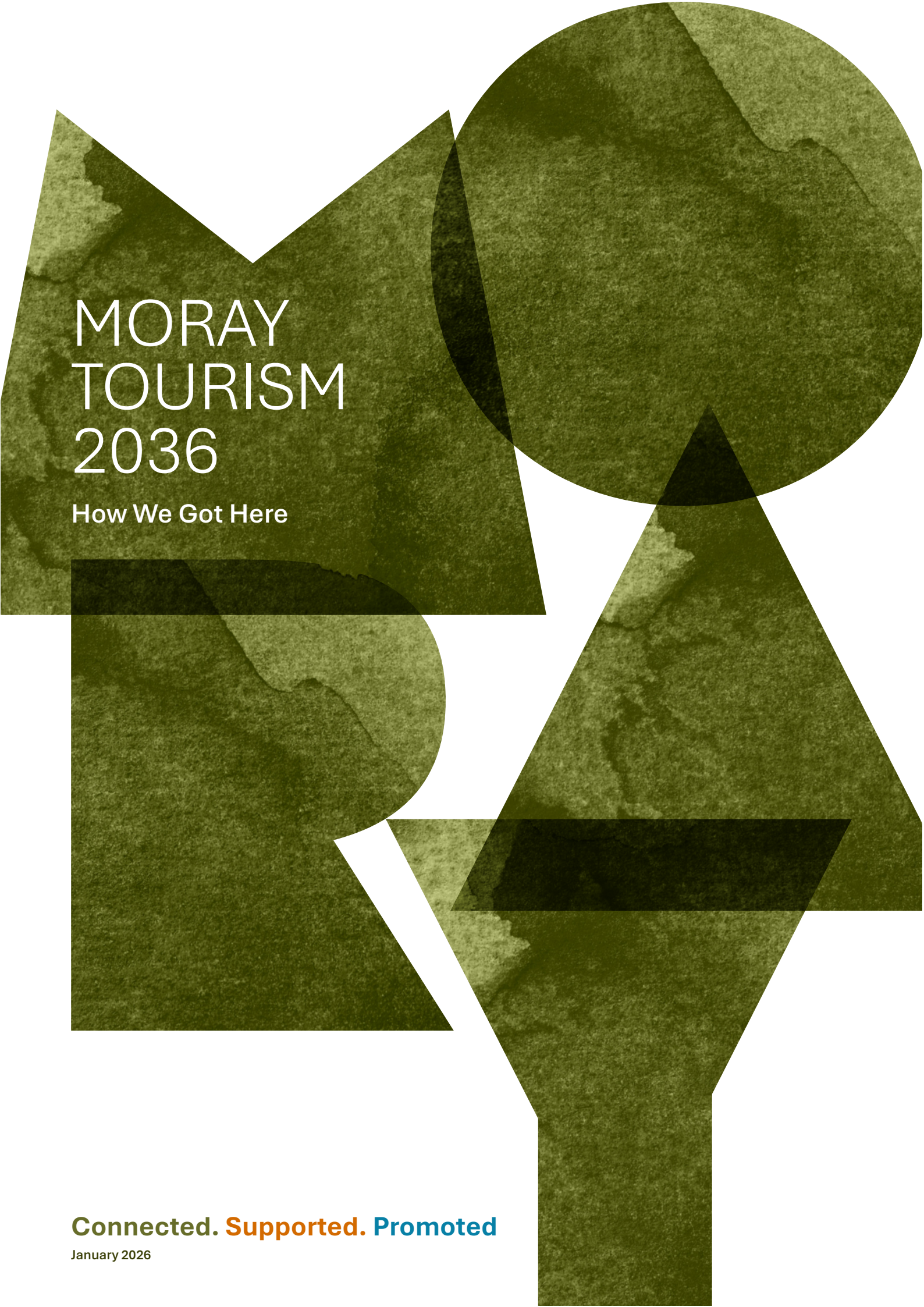


The background features a large, abstract composition of green watercolor washes and geometric shapes. A large circle is in the upper right, a large triangle is in the lower right, and a large, irregular shape is on the left. These shapes overlap and are layered, creating a sense of depth. The watercolor has a textured, mottled appearance with varying shades of green.

MORAY TOURISM 2036

How We Got Here

Connected. Supported. Promoted

January 2026

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MORAY TOURISM 2036 – A 10 YEAR TOURISM STRATEGY

This document forms the second 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

‘How We Got Here’ sets out the policy and investment context and provides data and insights from the 3-month engagement programme which informed this strategy.

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.

INTRODUCTION

People, Places & Purpose:

A Pioneering Approach to Destination Cohesion, Stewardship and Promotion

The strategy for Moray moves beyond traditional tourism frameworks. This is a strategy about connection: between Moray's communities, businesses, landscapes and places; between local stories and visitor experiences; between aspiration and delivery.

Developed using SCOTO's Press Pause® methodology, the Moray Tourism Strategy 2036 is grounded in local insight and co-created through extensive engagement with businesses, communities and partners across Moray. Over a three-month period, more than 300 individuals contributed through surveys, workshops, forums, interviews and strategic discussions, committing more than 480 hours of lived experience. This evidence-led process ensures the strategy reflects local capacity and ambition, aligns with regional and national policy, and responds directly to the realities of Moray's people and places.

What We Learned

Moray is a region rich in possibility. Relatively compact, its character is strikingly diverse, stretching from an expansive rugged coastline with sandy beaches to rolling fields and forested landscapes and snow topped mountains. The Moray landscape is dotted with historic features, and Speyside has the greatest concentration of malt whisky distilleries of Scotland's whisky regions. Moray has enjoyed a long tradition of country sports, golf, walking and seaside holidays and holds a tapestry of towns and villages, each with distinct character and a richness of built, cultural and intangible heritage, creating a place where an exceptional diversity of experiences are possible and all within easy reach.

Moray was not managed as a discrete and singular destination until relatively recently. It previously was split between Highland and Grampian Regions and embraced three traditional shires – Nairn, Elgin and Banffshire – each with their own identity. The Speyside whisky region included but extended beyond Moray and when the Cairngorms National Park was designated it incorporated the upland area of Moray.

For five years a new destination marketing organisation for the region has built an online presence and has been engaging with the industry and developing links with the travel trade. However, the Destination Management Organisation (DMO) ceased to exist early in 2025 meaning the ten-year tourism strategy considers not just what could and should happen but also how this can best be delivered through collaboration and leadership.

Engagement revealed a deep pride of place and a shared belief that Moray has all the ingredients for a thriving visitor economy. Yet these strengths are currently **under-connected, under-promoted and under-supported**. Passion is abundant, but siloes between businesses, assets and communities have limited Moray's potential. This is where the greatest opportunity lies. Optimism exists but it is individual and measured. There is a clear call for change grounded in realism and the definition of what is needed to achieve this in Moray: **destination leadership, a joined-up game plan, a clear and consistent narrative, and investment in coordination and collaboration.**

SETTING THE SCENE

A Future We Shape Together

The strategy is intentionally pioneering, enabling Moray to define its own future through a place-based lens. It integrates community wealth-building principles, aligns with Scotland's wellbeing economy commitments, and reflects the strength in Moray's volunteer-led innovation.

It positions Moray not just as a follower of national policy but as a motivated contributor: the MORAY TOURISM STRATEGY 2036 sits purposefully within the National Strategy for Economic Transformation and Scotland Outlook 2030, the national tourism strategy seeking responsible tourism for a sustainable future.

It anchors the visitor economy in wellbeing, giving equal weight to social, environmental and economic benefit and is built from the grassroots up, grounded in local ambition, capacity, capability and lived experience.

Our 10-Year Vision

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.

POLICY CONTEXT

National and Local Policy

Moray enters a pivotal moment in its tourism journey. Despite global brands, outstanding landscapes and strong community traditions, engagement shows these strengths are not yet translating into a confident, coherent destination. What stakeholders consistently called for was not bigger ambition, but clearer alignment, stronger coordination and a destination model that reflects Moray's community-powered identity. The wider policy landscape strongly supports this direction.

Nationally, Scotland Outlook 2030, The Scotland's National Strategy for Economic Transformation (NSET) and VisitScotland's responsible tourism priorities all signal a shift toward **thriving places, skilled and passionate people, memorable experiences, diverse business models and a visitor economy that delivers community wealth, fair work and environmental stewardship**. These priorities closely mirror Moray's own strategic aspirations: to build year-round economic resilience, strengthen local supply chains, improve digital visibility and ensure tourism enhances quality of life.

Cross-cutting policies on community empowerment, the Place Principle, climate adaptation, nature restoration, transport and housing further reinforce the need for a tourism model that is sustainable, place-based and locally shaped.

Moray's engagement feedback calls for infrastructure first, managed growth, improved connectivity and stronger leadership, which directly aligns with these national and regional commitments.

Locally, tourism sits within a wider framework of long-term investment and regeneration, including the **Moray Growth Deal, the Moray Local Development Plan, Local Place Plans**, climate and biodiversity strategies, and cultural and heritage-led developments. Together, they position tourism as a contributor to community wellbeing, placemaking, skills development, talent retention and environmental resilience, not a standalone sector.

Taken together, the policy context strengthens Moray's case for evolving its tourism model. Moray is not being asked to change direction; rather, national policy now validates what its communities have already called for: a more coordinated, stewardship-led, community-powered approach that shifts practices and **changes mindsets**, ensuring the benefits of tourism are felt first and foremost by the people who live and work here.

Scotland Outlook 2030 – Responsible Tourism for a Sustainable Future

Outlook 2030 sets the ambition for Scotland to be the world leader in 21st-century tourism: an industry built on thriving places, passionate people, memorable experiences and diverse, responsible businesses.

The Tourism & Hospitality Industry Leadership Group established in 2022 to champion delivery of the strategy is now progressing five missions: Proud & Valued People, Technology to Enable, Community-led Tourism, Sustainable Transport and Destination Net Zero.

Moray's strengths, volunteer-led stewardship, rich heritage, strong local identity, and a deeply rooted sense of place map directly onto the Outlook 2030 pillars and mission themes. The region's emphasis on slow, meaningful, community-connected experiences positions it strongly to deliver on Outlook 2030's transition from growth to value, quality and positive impact.

Scotland's National Strategy for Economic Transformation (NSET) – Wellbeing, Skills and Community Wealth Building

NSET prioritises a fair, green and flourishing economy, with specific emphasis on skills, innovation, community wealth building, fair work and productivity.

The engagement process revealed clear alignment: Moray's communities want tourism to create year-round jobs, strengthen local supply chains, support local producers, and provide career pathways that encourage young people to stay. The strategy's focus on capacity-building, leadership development and cross-sector collaboration directly supports NSET's ambitions.

Scottish Government Policy on Community Empowerment & the Place Principle

This encourages public, private and community partners to work collaboratively in a place-based way, now embedded in local and national decision-making. Communities are being empowered to own and manage assets and to have their voice heard in decision making.

This refreshed Moray tourism model, centred on community-powered stewardship and locally shaped visitor experiences, is a live expression of these principles. Engagement evidence shows strong appetite for greater local influence in how tourism is planned, funded and managed, fully aligned with Scotland's wider movement towards localism, empowerment and shared leadership.

VisitScotland Corporate Plan & Responsible Tourism Positioning

VisitScotland's transition to a national marketing and development agency built around responsible tourism, visitor management, net zero, and community benefit provides a clear reference point for Moray.

Key priorities such as improving digital visibility, dispersing visitor pressure, supporting inclusive tourism, and developing year-round experiences mirror the priorities raised by Moray's businesses, residents and community groups. The region's current gaps (destination visibility, digital coherence, infrastructure strain, inconsistent product development) align precisely with national concern areas, creating a strong case for partnership.

Transport, Housing, Skills and Wellbeing Policy Linkages

Tourism intersects with wider policy agendas that are especially relevant for Moray:

- **Transport** – national commitments to active travel, demand-responsive transport and rural connectivity support Moray's calls for joined-up mobility and better access to coast, trails, towns and heritage.
- **Housing** – national concern over rural housing shortages aligns with Moray's need for balanced, community-positive visitor accommodation provision and affordable housing for locals.
- **Skills & Fair Work** – Scotland's skills investment plans align with Moray's ambition to create a proud, well-trained tourism workforce and improve career routes in hospitality, culture, conservation, events and digital.
- **Wellbeing** – Scotland's wider wellbeing economy agenda reinforces Moray's focus on community benefit, pride of place and improving quality of life.

Climate, Nature and Land Use Policy

National commitments, including Scotland's Net Zero 2045 target, the Emissions Reduction Plan, and biodiversity strategies place nature recovery and climate adaptation at the heart of regional planning.

Moray's communities consistently emphasised the environment as both their greatest asset and their greatest responsibility. Calls for better path maintenance, managed and inclusive access, toilets, parking and stewardship align with national policy on responsible access, green infrastructure and climate resilience.

Local Policy Framework – Anchoring Tourism in Moray's Long-Term Future

This strategy complements and supports:

- **Moray Economic Strategy** - positioning tourism as a driver of inclusive, place-based growth through enterprise confidence, skills, regeneration and community wellbeing.
- **Moray Growth Deal** – investments in culture, innovation, skills and infrastructure (including Elgin Cultural Quarter).

- **Local Development Plan 2020, Local Place Plans & emerging LDP** – reinforcing place-based regeneration, heritage-led renewal, active travel and sustainable development. Local Place Plans – capturing community aspirations that directly inform local visitor experiences.
- **Climate and biodiversity strategies** – aligning tourism with environmental priorities.
- **Strategic Tourism Infrastructure Development Plan**
- **Heritage- and conservation-led investment programmes** such as Forres Conservation & Heritage Scheme and Dallas Dhu.

Tourism is simply not a standalone sector, it is a contributor to wider placemaking, regeneration, housing, cultural development, environmental stewardship, climate adaptation and community wellbeing. This tourism strategy will support and contribute to the delivery.

PLANNED INVESTMENTS

Moray is entering a period of purposeful investment that strengthens both quality of life for residents and the depth of experience for visitors. 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 the 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.

GLOBAL TOURISM TRENDS

Tourism worldwide is undergoing significant transformation, accelerated by post-pandemic shifts, the climate emergency technology and changing consumer expectations.

- [VisitScotland’s Trends for 2025: The Experience Economy](#)
- [VisitBritain’s Consumer Trends 2026/27](#)

both highlight a decisive move towards experience-rich, values-driven and restorative travel, patterns that strongly reinforce Moray’s future direction.

Five trends are particularly relevant to Moray:

1. **Value-led, locally rooted not volume-led travel**

Trend: Travellers increasingly want trips that feel “worth it”: authentic and tailored to their own passions, rather than generic sightseeing. VisitBritain’s Experience like a Local and Real Connections trends show growing demand for immersion in everyday local life, co-created with communities, and for shared social moments that deepen understanding of a destination. VisitScotland’s experience-economy highlights hands-on “meet the maker” experiences over material consumption.

For Moray: this underlines the shift from chasing visitor numbers to attracting guests who stay longer, buy local produce and build repeat relationships with communities.

2. **Experience over attraction**

Trend: Both VisitScotland and VisitBritain show that people are designing trips around interests, events and life moments, rather than simply visiting a list of attractions.

Global trend reports from Skyscanner and others echo this shift to culture-led, passion-driven travel where unique food, stories and creative scenes are a key draw.

For Moray: The mix of coastal, river, forested landscapes, wildlife, dark skies, Scots language, creative industries, festivals and events, creates a strong platform for curated passion-trips that encourage higher spend and repeat visits.

3. **Slow, sustainable and regenerative tourism**

Trend: VisitBritain’s Travel for Good, Back to Nature and Healthy Habits trends identify trips that actively benefit local environments, economies and communities.

VisitScotland’s focus on wellness, nature and outdoor therapy, and ethical partnerships reinforces the opportunity for Scotland to lead on community-centred, low-impact experiences. Globally, UN Tourism and World Travel & Tourism Council (WTTC) report rapid growth in sustainable and regenerative tourism.

For Moray: Positioned strongly for nature-based and wellness-oriented experiences, while Volunteer-led stewardship, community facilities and local enterprise already reflect regenerative practice, that aligns Moray with global best practice and national policy.

4. **Digital-first planning and navigation**

Trend: Trip planning is increasingly digital, multi-channel and increasingly AI-assisted, strong online presence and cohesive storytelling are essential.

For Moray: This confirms the need for a consistent digital presence and visible bookable product. The current fragmented visibility and unmanaged destination website were identified as major barriers to growth.

5. **Climate and cost-of-living pressures**

Trend: Concern for the environment and rising costs for visitors and businesses make low impact, affordability, year-round income and fair work crucial. Moray’s micro-business economy and seasonal patterns increase urgency.

For Moray: Transparent value propositions and storytelling that makes it easy for visitors to choose lower-carbon options (public transport, longer stays, off-season trips) alongside evidencing how spend benefits communities.

These shifts create both a challenge and opportunity:

Moray must evolve its tourism model and can do so by building on its unique strengths and being better connected.

INSIGHTS AND EVIDENCE BASE

Moray is a relatively new destination identity. Historically divided between Highland and Grampian Regions and comprising parts of three former shires (Nairn, Elgin and Banffshire), the area today includes much, but not all, of Speyside, Scotland's premier whisky region, and a portion of the Cairngorms National Park. Until March 2025, the Moray Speyside BID operated as the region's Destination Marketing Organisation, Visit Moray Speyside, focusing particularly on digital presence and travel trade engagement, and also recovery following the pandemic.

The Current Moray Evidence Base

What emerges from the current evidence base of available data and the programme of engagement for this strategy is a region with strong foundations and deep community involvement, yet constrained by fragmentation, infrastructure gaps, and the absence of coordinated destination leadership or a unifying narrative.

STEAM Data - Tourism in Moray 2019 to 2024

Visit Moray Speyside subscribed to annual STEAM Data over recent years, and the most recent data is for 2024. STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection.

Many local authorities across Scotland subscribe to STEAM data allowing comparisons between different areas.

Although data is available on a year-on-year basis the data is not consistently presented with previous years not index linked and the most recent data for 2024 being index linked.

A simple analysis suggests the total economic impact of tourism across the region has grown from £134m to £189m with employment remaining around the 2,900 level since 2019 (with an expected dip around and related to the pandemic). The data indicates that greater value is being derived from visitors relative to the number of visits.



source: STEAM Data for Moray

VisitScotland Visitor Survey Data

Until relatively recently Moray data was aggregated with Aberdeen and Aberdeenshire. More recently this has been disaggregated to a Moray level although it is a relatively small sample size.

Highlights from the 2023 data

- **Visitor Origin:** 84% domestic (UK), 16% international.
- **Length of Stay:** Average 4.7 nights in Moray (part of 10.7 nights in Scotland).
- **Key Motivations:** Scenery/landscape (77%), outdoor activities (44%), history/culture (41%), visiting friends/family (38%).
- **Accommodation:** 82% used non-serviced options (self-catering, camping, motorhomes).
- **Economic Impact:** Record £187m to the local economy in 2023.
- **Visitor Numbers:** Over 877,000 visitors in 2023 (25% increase from 2022).

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%

VISITOR ECONOMY PROFILE

Moray's Dual Market

An important feature of Moray's tourism performance that is not necessarily captured by the STEAM data or the VisitScotland visitor survey is that the visitor economy is shaped by **dual markets**; 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.

The current data provides insight on the domestic market but does not yet capture the dual nature of Moray's markets and the prevalence and importance of the premium international market attracted by the global brands, notably the Speyside distilleries, golf and country sports. The strategy engagement activity flagged the significance of this.

Domestic-Led, Experience-Seeking Market

Moray's domestic dominance is one of its most defining strengths. With among the **highest repeat-visit rates in Scotland**, the region attracts families, older couples, Scottish day visits and short-breakers and 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.

Premium International Market - Whisky, Golf and 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. Indicators show this market is growing, yet under-realised due to fragmented itineraries, limited premium accommodation, poor transport infrastructure to remote rural locations and a lack of bookable high-end product.

Strengthening Moray's narrative, developing premium itineraries and deepening connections between global brands and local communities provide opportunities for growth.

Engagement highlighted a need to understand these markets better through a premium lens, by fostering closer collaboration; to attract a wider reach of audience and expand premium experiences, beyond whisky and golf, to cater for multi-interest visitors travelling together.

Growth in Independent and Touring Travel

Across the coast, Speyside and the Glenlivet–Tomintoul corridor, increases in campervans, motorhomes, road-trippers and active-travel visitors are evident. These markets align well with Moray's landscape, but concerns are growing relating to infrastructure such as parking, toilets, waste management, signage and behaviour guidance. Managed experiences, clearer communication and consistent visitor services are required.

Business Stays: A Steady but Under-Recognised Contributor

Business-related stays emerged as a significant but often overlooked part of Moray's visitor economy. Across the survey and Press Pause® engagement, stakeholders highlighted regular demand from RAF Lossiemouth personnel, contractors, engineers, renewables teams, training groups and short-term project staff, particularly in Elgin, Buckie and Keith. These visitors provide steady, year-round occupancy that helps stabilise accommodation businesses outside the traditional tourism season. Workshop discussions noted that business stays form part of the 'visitor economy' influencing price, availability, workforce needs and perceptions of capacity. Wider stakeholders highlighted opportunities to better understand this market and encourage leisure extensions and returning visits with family or friends.

LOCAL ENGAGEMENT

Building on SCOTO's Press Pause® methodology and a programme of engagement, this strategy is shaped by local insight and co-created from grassroots perceptions of local capacity, capability and lived experience. The strategy is reinforced by reflecting regional and national strategies and is informed by existing data and wider national and global tourism trends.

MORAY TOURISM 2036 was shaped by extensive dialogue across Moray and co-created over three months.

The engagement included:

- 117 responses to an open online survey, with a 100% completion rate and an average of 27 minutes spent per response.
- 7 area-based in-person Press Pause[®] workshops with 79 businesses and community organisations.
- 6 online sector themed forums with 71 participants
- A strategic business meeting with Moray Chamber of Commerce and member businesses
- A series of stakeholder interviews with agencies, sector partners, business interests, land managers and experience providers

This strategy has been informed by more than 480 hours of local engagement by more than 300 individuals and responds directly to that lived experience.

Key Learnings

What's Working Well in Moray Today – Lived Experience

Across area workshops, online forums and survey comments, several core strengths emerged, with repeated focus on the potential to better connect and coordinate these:

1. Exceptional Natural and Cultural Assets

Coast, forests, rivers, dark skies, landscapes, built heritage sites, arts and creativity, wildlife and marine life form Moray's strongest foundations from the Press Pause[®] destination competency appraisal.

2. Distinctive identities within a compact region

Moray embraces several towns and villages each with their own identity, and each community brings a diverse and unique flavour.

3. Tourism tradition

Moray has a deep-rooted association with estate-based country sports, traditional hunting, shooting, fishing, alongside a heritage of whisky and golf. This contrasts with a notable long-standing coastal holiday park tradition of weekly and fortnightly stays and more recently investment in second and retirement homes.

4. A strong culture of community initiative

Volunteer-led delivery is deeply embedded in Moray. Facilities, gardens, public realm, heritage centres, events, trails and information hubs are a source of local pride, defining part of the Moray welcome.

5. Established events and festivals

Spirit of Speyside, Findhorn Bay Arts Moray, MacMoray and Speyfest music festivals, Moray Outdoor & Walking Festival, Rise Dance Festival, niche events like the Cullen Skink World Championships plus local agricultural and highland shows/games are individual successes.

However, engagement highlighted the need for an annual Moray events calendar and further collaboration with scheduling and promoting events across the region to avoid clashes which limit accommodation availability.

6. Responsible and respectful visitors

Land managers report low conflict providing a strong base for carefully managed sustainable growth.

What's Not Working — Gaps and Barriers

Across area workshops, online forums and survey comments, several gaps and barriers emerged, again with repeated focus on the need to better connect and coordinate activity across Moray:

1. Leadership and Coordination Vacuum

The closure of Visit Moray Speyside created major gaps in digital presence, convening, marketing and information flow - the most frequently cited barrier.

2. Fragmented Visibility and Storytelling

Outdated websites, inconsistent signage, unclear visitor information and scattered community pages hinder navigation and raise confusion.

3. Infrastructure Gaps Impacting Visitor Experience

Parking, toilets, road conditions, public transport, travel links, accessibility, town maintenance & motorhome management were identified as top priorities (78%).

4. Volunteer Fatigue and Fragility

While volunteering is a strength, it is fragile. Without support or succession, essential services are at risk.

5. Workforce and Housing Pressures

Housing affordability and sector-wide skills gaps limit Moray's capacity.

6. Inconsistent Council Support and Silo Working

While positive in places, some communities noted variability in council communication and responsiveness and suggested culture, land, business, community and public sectors operate effectively within their own remits but lack mechanisms to work together

Competitors

Across engagement, Moray's competitors were not framed narrowly as "other Scottish destinations" but as **places perceived to be more visible, confident, coordinated and investment ready**.

The absence of a single shared narrative and delivery structure for Moray creates a psychological effect among stakeholders, a sense that Moray is competing with destinations that appear more organised and more clearly understood.

The destinations most frequently referenced: Highland, Aberdeenshire, Cairngorms National Park, Perthshire, North Coast 500 and selected islands, share several characteristics including stronger destination leadership and visibility, investment in visitor infrastructure, strong recognisable place brands. Moray is often seen as a lower-cost alternative when capacity in the Highlands is full (e.g., Inverness) rather than a destination in its own right.

Collaboration Effect

Moray's key competitors are also its potential collaborators. Key products exist adjacent to Moray and could easily extend into the region, with examples being Highland's Pictish trail and the Aberdeenshire Castles Trail.

There are examples of successful visitor facing strategic collaborations in the Moray area (some of which extend beyond Moray itself).

Two important annual festivals are the Spirit of Speyside Whisky Festival established in 1999 and Moray Outdoor and Walking Festival.

For touring there is the North East 250 circular touring route which was initially established prior to the pandemic and was relaunched in 2025, and NEOS (North East Open Studios) has operated since 2003. Each of these bring partners together and can be springboards for further collaborations.

Collaborators such as VisitScotland, visitor attractions, whisky distilleries, transport providers and cultural institutions play roles in anchoring Moray in wider itineraries.

Stakeholders highlighted that without a clear regional voice, Moray struggles to collaborate and engage effectively in national programmes or represent its interests.

MORAY'S DESTINATION COMPETENCE

A Place Based Appraisal

Using SCOTO's Press Pause® destination competence framework, at the seven area-based workshops, the communities assessed Moray's practical readiness as a destination. 20 criteria that each support a destination's competence were appraised using a simple traffic light scoring system of red where there are serious issues or the competence criteria doesn't exist; amber where there are issues that need addressed and green where things are working well.

This is scored at a local level and through collective discussions with business and community interests. It is relative to the individual place and what local interests feel rather than a league table. It is a robust measurement of lived experience and sentiment.

Each appraisal revealed that there are several competencies that need addressed, with some of these being within the hands of locals and others much more reliant on external interventions.

Taking each of the thirteen community groups in turn there is a stronger sense of optimism in some areas than others. Key examples are Forres and Findhorn, Cullen, Fochabers, Keith and Aberlour.

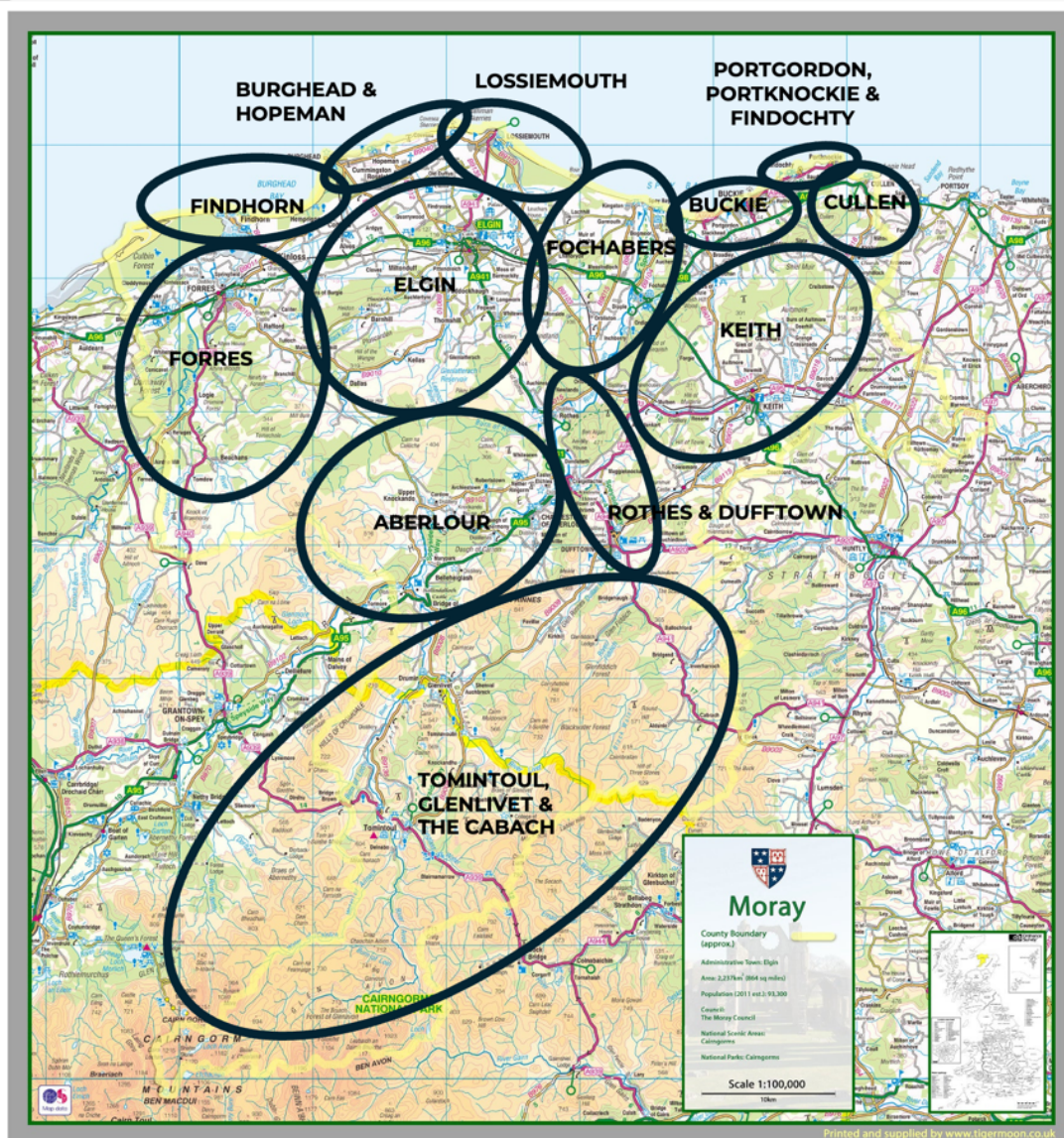
Elgin, for example, scored only one green (Amenities & Infrastructure), echoing concerns about its current performance as the region's strategic centre, though Moray Growth Deal investment is expected to improve this.

By aggregating the ratings across the destination and then averaging these out a summary appraisal is generated allowing a grass roots appraisal of underlying capacity and capability.

Across Moray, three aggregated strengths emerged: **tourism tradition | arts, culture and heritage | wildlife and nature**. This is significant as these are basic building blocks for a successful visitor economy. There is a tradition of tourism in the area from the coastal villages and holiday parks to the Speyside distilleries, country sports and outdoor pursuits.

Moray also has two core strengths as a destination with notable arts, culture and heritage, wildlife and nature assets across the entire region, and a depth of stories to tell.

However, all other criteria scored an average of amber or red — highlighting gaps in the provision of activities and experiences, poor information availability and signage, a lack of a coordinated events programme, a weak overarching identity and concern about Moray's digital presence and marketing plus destination collaboration following the demise of Visit Moray Speyside. This is significant as these key weaknesses are all within the grasp of Moray's businesses and communities if harnessed together and spearheaded through effective leadership and collaboration.



Simplified map of Press Pause® Destination Competency Appraisal Places

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

A SENSE OF IDENTITY & PLACE BRANDING

Stakeholders repeatedly emphasised the need for a clear Moray-wide narrative, noting that the strong “Speyside” brand is clearly well known but overshadows the broader Moray identity and is heavily whisky-centric which potentially limits new and potential visitors’ understanding of the quality and depth of experience available.

Historic boundaries (Nairnshire, Elginshire, Banffshire; Grampian vs Highland; inclusion in the National Park) contribute to a lack of natural geographic coherence further underlining the need for a unified narrative.

However, engagement highlighted that Moray has several differentiating features as foundations for a sense of identity, examples being;

- Speyside has the greatest concentration of malt whisky distilleries of Scotland’s whisky regions,
- Moray is home to Scotland's circular long-distance walking route,
- Moray Firth has one of the largest populations of resident bottlenose dolphins,
- Moray has a high percentage of forestry cover at 33% of the total land area compared to 18% national average,
- Moray has more than 250 walks and trails.

Many of Moray’s towns and villages also have important **points of differentiation** that reinforce the local sense of identity and offer inspiration for Place Branding, product development and authentic experiences. Some key examples highlighted at the Press Pause® workshops include:

- **Forres:** traditional home of the 'Real Macbeth'; birthplace of Sir Alexander Grant, who developed the recipe of the Digestive Biscuit; Sueno’s Stone – Scotland’s tallest surviving Pictish cross-slab; Forres in Bloom – RHS Britain in Bloom Champion of Champions & Beautiful Scotland accolades
- **Findhorn:** former fishing village and home to one of the UK’s largest intentional communities – the Park Ecovillage,
- **Burghead:** Home of 'Burning of the Clavie' Festival and site of Scotland's largest known Pictish Fort
- **Lossiemouth:** RAF Lossiemouth - only operational fast jet base in Scotland; birthplace of Ramsay MacDonald - UK's first Labour PM; two 18-hole championship links designed by Old Tom Morris (Old Course) and Sir Henry Cotton (New Course); birthplace of Margaret (Meg) Farquhar, the first female professional golfer in Britain
- **Cullen:** Home of Cullen Skink and host of the Cullen Skink World Championships, Historic Icehouse at Cullen House and distinct coastal geology along the Cullen-Portknockie shore
- **Aberlour:** Aberlour Childcare Trust a 150-year legacy, Linn Falls, home of Walkers Shortbread and Aberlour Distillery
- **Elgin:** Elgin Cathedral - Scotland’s second-largest medieval cathedral; Elgin Museum - Scotland's oldest continuous independent museum; Biblical Garden - recognised as Scotland’s first biblical-themed garden; founding town and long-standing home of globally recognised heritage brands Johnstons of Elgin and Gordon & MacPhail;

Alexander Graham Bell a teacher-pupil at Weston House Academy; birthplace of Screenwriter Allan Shiach (Allan Scott)

- **Keith:** Scots Toun & association to the origins of 'Gordon Bennett', Keith Kilt & Textile Centre which hosts the only qualification in Kilt making in the world, Keith and Dufftown Railway, the most northerly heritage railway famously featured as the Traitors Railway Station and home of Strathisla Distillery – one of Scotland's oldest working distilleries
- **Tomintoul** – highest village in the Highlands and home to one of Scotland's longest running Highland Games
- **Glenlivet** – Glenlivet Estate – part of the Cairngorms National Park, with extensive trails and dark sky designation and home of The Glenlivet Distillery known as the oldest legal distillery in the Highlands of Scotland

A CONNECTED, CONFIDENT, COMMUNITY POWERED MORAY

The voices of Moray's people; the volunteers, businesses, makers, land managers, cultural leaders, and residents shape the region every day and have engaged in shaping this new strategy.

This ensures it is a practical and deeply place-rooted plan designed to:

- strengthen the fundamentals
- build collaboration
- protect landscapes and identity
- support volunteers and communities
- create bookable, meaningful experiences
- enhance year-round prosperity
- position Moray as a leader in responsible tourism

Moray's future does not rely on becoming something it is not just now.

Its strength lies in its quiet excellence, authenticity, community pride, and remarkable diversity.

If Moray can join these together through a strategy that is focused on **coordination, narrative, infrastructure and collaboration** it will not only thrive locally but become a national exemplar of community-powered destination stewardship.



Moray Tourism 2036

Connected. Supported. Promoted

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This strategy has been developed and produced by SCOTO CIC based on SCOTO's PressPause® 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.

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