



MORAY TOURISM 2036

Our Ten Year Strategy

Connected. Supported. Promoted

January 2026

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This document forms the primary and first in the 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

A glossary is provided in document 3.

Moray Tourism 2036

WELCOME TO OUR STRATEGY

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

By appraising local capacity and capability, then centring on inclusion, collaboration and place-based decision making, the strategy champions a model where tourism strengthens local services, supports local enterprise and enhances everyday life and prospects. Success is defined by delivering clear, realistic and lasting benefits for all.

Moray Tourism 2036 has been developed through an extensive engagement programme including an online survey, seven area-based Press Pause® workshops, six on-line themed forums, interviews with partner organisations and a strategic meeting with Moray Chamber of Commerce and business members. More than 300 people contributed their time, experience and insight, committing over 480 hours to informing the strategy and articulating a shared ambition for tourism in Moray.

Drawing on this lived experience, SCOTO CIC has synthesised these insights into a coherent, place-led tourism strategy that builds on Moray's distinctive strengths while addressing key gaps and pressures. At its heart is a quiet yet confident narrative that reflects Moray's people and places, and positions tourism as purposeful, connected and grounded in local reality.

Developed in the absence of a formal destination organisation, Moray Tourism 2036 addresses both the what and the how. Early emphasis is placed on re-establishing effective leadership and coordination, strengthening collaboration and enabling a shared narrative for Moray that can be confidently and collectively owned and amplified.

This Strategy is aligned with national, regional and local priorities for sustainable economic growth, climate responsibility and community wellbeing. It supports wider ambitions to strengthen Moray's economy, protect and enhance its natural and cultural assets, and ensure that growth delivers lasting benefit for people and place. Tourism is positioned not as a standalone sector, but as a contributor to wider outcomes across enterprise, skills, culture, land, nature and communities.

Fundamentally, the strategy calls for a shift in mindset away from tourism as something that simply happens in Moray, towards an approach that is shaped with Moray. Collaboration is central, bringing communities, businesses and partners together around shared priorities and a clear understanding of what success looks like.

Moray Tourism 2036

MORAY SPEAKING FOR ITSELF

Moray stands at an important moment.

Following the closure of Visit Moray Speyside in 2025, stakeholders across the region; communities, volunteers, businesses, land managers, cultural organisations and national partners, voiced a unified message:

Moray has enormous potential, but its strengths are not yet connected, coordinated or confidently communicated.

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

Moray is not Scotland’s loudest destination and that is part of its charm, and its strength. It is a place to slow down, delve deeper and return often. A place where people, nature and culture flourish together and where visiting feels like a privilege.

This tourism strategy is grounded in a narrative that reflects Moray as it truly is:



Calm, restorative landscapes



Exceptional craftsmanship in whisky and food



Creative communities and deep heritage



Welcoming towns and villages



Quiet excellence and authenticity

Moray does not demand attention.

It earns it.

Slowly, warmly, deeply.

This shared narrative becomes the anchor for how Moray speaks to Scotland, the UK and the world - just as importantly, how the people of Moray speak about themselves with confidence and pride.

“MORAY ISN’T
LOUD –
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Moray Tourism 2036

OUR
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.

A STRATEGY FOCUSED
ON PEOPLE,
PLACES & PURPOSE

Moray Tourism 2036 focuses on strengthening connection between visitors, communities, businesses and places; providing practical support for those shaping the visitor experience; and promoting Moray through a clear, shared narrative that can be confidently communicated by all.

This vision is rooted in:

- Community empowerment
- The wellbeing economy
- Stewardship, responsibility and sustainability
- Collaboration and partnership
- Pride of place

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

OUR GUIDING PRINCIPLES

Based on the extensive engagement from 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.

MORAY'S GUIDING PRINCIPLES: SHAPING DECISIONS AND ACTION

A Joined-Up Place Led Proposition

- Connecting Moray's hidden assets with its global brands; linking place and people as one coherent destination.
- A collegiate, agile and transparent destination management model that represents businesses, communities, global brands and volunteer groups.

A Renewed Place Narrative

- Rooted in Moray's landscapes, people, culture, creativity, and contrasts.
- A strong, place-rooted, cohesive story guides how Moray presents itself and how businesses and communities collaborate translating into authentic memorable experiences.

A Confident Foundation For Enterprise And Prosperity

- Creating an environment for enterprise to invest and grow with clarity and confidence.
- Tourism empowers businesses and communities to invest with confidence, supporting fair work, skills and a resilient workforce.

A Wellbeing Economy Lens

- Tourism as a driver of local pride, resilience, and fair work balancing people, places and profit.
- Tourism growth should be supported by the essential infrastructure that serves both residents and visitors.

Communities As Partners Not Spectators

- Recognising local organisations, charities, social enterprises and volunteers as essential contributors.
- Visitors feel connected through authentic, placebased experiences developed collaboratively and delivered by proud local people.

Stewardship First

- Tourism that strengthens everyday life, protects Moray's landscapes and delivers long-term value for communities, businesses and visitors.
- Growth is paced to local capacity, with investment in infrastructure, environment and visitor management coming before promotion.

THE OPPORTUNITY

Available STEAM data which is modelled year on year highlights that Tourism in Moray already contributes:

 **£189m**
in annual economic value

 **2,900 jobs**
stable across several years

The latest VisitScotland visitor survey suggests Moray enjoys Scotland's **highest repeat-visit rate (91%)**. This loyalty is a remarkable asset.

Tourism is clearly an established and important part of the local economy although what remains unknown is how much of that spend stays in the local economy, how many jobs are living wage and permanent jobs, and what motivates the repeat visits. Moray Tourism 2036 provides the platform for ensuring tourism doesn't just happen in Moray, but brings tangible benefits to the people, businesses and communities of Moray and is a net contributor and not a net extractor.

WHAT IS HOLDING MORAY BACK?

MORAY'S EVOLVING PLACE WITHIN SCOTLAND'S TOURISM LANDSCAPE

Moray has for many years been largely subsumed by wider tourism geographies and consequently has been on the fringe – on the edge of the Highlands, of Aberdeen and Aberdeenshire and of the Cairngorms National Park.

Some domestic visitors are deeply aware of Moray's appeal and return regularly, often through family connections or long-standing relationships with the area. High-end international visitors, particularly those exploring Scotland's whisky, golf and country sports offer, do arrive in Moray, but frequently as part of a wider itinerary, with relatively limited dwell time.

For most others Moray is easily bypassed whether heading north to Inverness, the NC500 and the west highlands or stopping short at Cairngorms or Aberdeenshire and not venturing that bit further. For many, Moray remains less visible, less understood and less clearly defined as a destination in its own right.

A STRUCTURAL GAP IN DESTINATION LEADERSHIP AND COORDINATION

These challenges have been amplified by the closure of Visit Moray Speyside following the unsuccessful renewal ballot for the Tourism BID in March 2025.

While cohesive destination management was emerging, the loss of the Destination Marketing Organisation has created a significant gap in leadership, coordination and collaboration. Destination marketing activity has largely ceased, established digital platforms are no longer proactively managed, and there is no focal point for collective action, engagement with the travel trade or joined-up promotion. Events and initiatives continue to take place, but without a shared framework to connect effort, resources or impact

DESTINATION COMPETENCE

A locally led, place based SCOTO Press Pause® appraisal of Moray's destination competence highlighted these issues clearly. Exploring 20 criteria across 13 communities and their hinterland and drawing on lived experience and local perception, the appraisal explored how Moray's many places currently "do tourism", identifying strengths and catalysts for growth alongside gaps and weaknesses that limit destination readiness. Each criterion is scored through facilitated conversation as a red, amber or green. Red indicates a major weakness - the criteria doesn't exist or is not functioning. Amber indicates where improvement is needed and green suggests all is well and this is a local strength.

The findings consistently pointed to issues of capacity, capability, coordination and collaboration, rather than shortcomings in the quality of Moray's offer.

“THE FINDINGS CONSISTENTLY POINTED TO ISSUES OF CAPACITY, CAPABILITY, COORDINATION AND COLLABORATION, RATHER THAN SHORTCOMINGS IN THE QUALITY OF MORAY'S OFFER.”

Moray Place by Place
Press Pause® Destination
Competency Appraisal 2025

20
criteria

13
places



Our strengths
and weaknesses

SCOTIA
PRESS PAUSE

SCOTO PRESS PAUSE® DESTINATION COMPETENCE APPRAISAL

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 underpromoted

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

FEATURES & ATTRACTIONS

A decent range of significant natural and built features of interest and attractions – under-promoted and not joined up

VISITOR ACCOMMODATION

Quality has been improving; notably 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 day time café culture; limited fine dining and evening options

EVENTS & FESTIVALS

Vibrant local community-based events: some long-standing region-wide activity which 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 town 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

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

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

ACTIVITIES & EXPERIENCES

Strong potential for varied water and land-based activities and emerging focus on agritourism experiences; weak coordination, packaging and visibility

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

DESTINATION COLLABORATION

Major structural gap especially since VMS closure; concern VMS model wasn't inclusive for community interests; collaboration within individual towns/communities is inconsistent and is weak across Moray

COMPETENCY RATING

● Local strength ● Improvement needed ● Major weakness

THE CASE FOR CHANGE

OUR CORE INSIGHT

When time is taken to understand Moray, it becomes clear that the region already has the core ingredients of a compelling destination. Moray has a long-standing tradition of tourism and hospitality, a strong sense of place at a local level, and a rich mix of natural, cultural and heritage assets that are intrinsic to the area and deeply valued by those who live and work here.

Across Moray's towns, villages and landscapes there are notable strengths in tourism tradition, arts, culture and heritage, wildlife and nature. The area offers a diverse and contrasting mix of coastal holiday parks, beaches and fishing harbours, rural towns and villages, rivers and forests, hills and mountains, traditional country sports, golf and a globally recognised whisky sector.

Moray benefits from exceptional building blocks that do not need to be created or imported. Its landscapes are calm and restorative, its food and drink offer is of high quality, its cultural and creative endeavour is active and evolving, and its communities demonstrate strong volunteer effort, pride of place and commitment to welcoming visitors.

Moray is therefore a destination which has exceptional assets across its geography, but it is currently on the fringe, is under-connected, under-promoted and under-supported. A destination which lacks its own cohesive and coherent narrative and identity of its own. Inspiration and information are inconsistent across the visitor journey, and there is no clear, shared narrative to help visitors understand how Moray fits together as a place to explore, stay and return to.

Moray's key weaknesses therefore lie not in what it offers but in how it operates and how it presents itself to the outside world. While collaboration within some towns and communities is strong, collaboration between communities, and between local interests and external partners, is uneven and often limited.

Addressing these gaps requires a new, place-led approach to leadership and collaboration, enabling Moray to connect its assets, build confidence and function as a coherent destination in its own right offering an authentic and high-quality visitor experience.

MORAY'S REGIONAL IDENTITY

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

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

The key to unlocking Moray's future and realising its potential as a distinct destination in Scotland lies with the people and the businesses of Moray coming together with one voice and one game plan.

EVIDENCING THE VALUE OF TOURISM IN MORAY

While available data provides a strong picture of Moray's domestic and repeat visitor markets, there is currently limited and inconsistent data relating specifically to premium and international visitors. Much of what is understood about these markets is drawn from proxy indicators such as whisky tourism, golf, country sports and high-end retail, alongside anecdotal evidence from businesses and lived experience rather than robust, destination-level intelligence.

This data gap limits Moray's ability to clearly evidence the scale, behaviour and value of premium and international travel, reinforcing the need for improved data capture, shared insight and stronger connections with the travel trade as part of the Strategy's early actions.

Moreover, the data that does exist is modelled and is limited to the 'size' of tourism in terms of footfall, overnight stays and spend whereas data that demonstrates how tourism is benefitting Moray's communities, businesses and environment will ensure it is perceived as a force for good.

LOCAL AMBITION AND READINESS FOR CHANGE

Realistic optimism was evidenced across all stakeholder engagement. There is confidence in Moray and stakeholders are seeking destination

leadership, a joined-up game plan, an enabling framework for enterprise, investment and growth, a clear, consistent and compelling narrative, and investment in destination coordination and collaboration.

WHY CHANGE IS NEEDED NOW

Moray is entering a period of renewed opportunity. Strategic public and private investment are underway and increasingly focused on place, infrastructure, culture, food and drink and visitor experience.

In addition, Moray is home to several globally recognised brands whose reach and reputation contribute to the area's international profile and appeal. This Strategy seeks to better integrate these global assets with Moray's wider visitor economy, strengthening connections with local businesses, food and drink producers, cultural organisations and communities. Better connecting these assets and enterprises offers the potential to translate global appeal into more locally rooted benefit.

Together, these factors make clear that Moray does not need to reinvent itself as a destination. What is required is a new, place-led approach to leadership, collaboration and storytelling—one that connects Moray's existing assets, people and ambition into a coherent and confident whole, and ensures tourism works for Moray rather than simply happening to it.

Moray Tourism 2036

OUR SIX STRATEGIC PILLARS

THE HEART OF THE STRATEGY – WHAT WE FOCUS ON

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.

The Moray Pillars for Action 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 PILLARS FOR ACTION



Leadership & Coordination

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

- **Purpose**
Rebuild inclusive, trusted destination leadership.

- **Early Priorities**
Establish Tourism Leadership Group; interim coordination team; strategic partnerships.

- **Outcome by 2036**
A sustainable, community-rooted destination body with clear accountability.



Identity, Brand & Promotion

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

- **Purpose**
Create a clear, shared narrative for Moray.

- **Early Priorities**
Agree core story; stabilise digital presence; unified events calendar.

- **Outcome by 2036**
A confident, coherent identity consistently communicated by all.



Enterprise & Investment

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

- **Purpose**
Enable local enterprise to grow with confidence and purpose.

- **Early Priorities**
Support bookable experiences; strengthen local supply chains; skills and fair work focus.

- **Outcome by 2036**
A resilient, diverse visitor economy rooted in local benefit.



Community Benefit & Resilience

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

- **Purpose**
Ensure tourism strengthens everyday life in Moray.

- **Early Priorities**
Community-led priorities; smallscale enabling investments; volunteer support.

- **Outcome by 2036**
Visible social, cultural and economic benefit for communities.



Visitor Experience & Dispersal

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

- **Purpose**
Shape responsible, year round visitor experiences.

- **Early Priorities**
Develop themed clusters; improve information and wayfinding; encourage longer stays.

- **Outcome by 2036**
Longer stays, wider dispersal and deeper visitor engagement.



Environment & Infrastructure

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

- **Purpose**
Protect place while enabling responsible access.

- **Early Priorities**
Improve core infrastructure; visitor management; climate-aware investment.

- **Outcome by 2036**
Healthy environments, reduced pressure points and long-term resilience.

OUR PRIORITY MARKETS

OUR PRIORITY MARKETS

Available data suggests Moray’s visitor economy is shaped by:

- Strong domestic demand
- High repeat visitation
- Deep emotional attachment to place

However, lived experience confirms that Moray also enjoys a significant premium international market linked to whisky, golf, country sports and specialist retail.

These combine as a dual market profile creating valuable opportunities to focus less on volume and more on value, quality and year-round local benefit.

MORAY’S DUAL MARKET



PRIORITY SEGMENTS

Four priority segments reflect the duality of Moray’s current visitor profile, local aspirations and national opportunity.

PRIORITY SEGMENTS		
SEGMENTS	WHO THEY ARE	WHY IT MATTERS FOR MORAY/ OPPORTUNITIES FOR MORAY
Slow Adventurers & Nature Seekers	Domestic and short-haul visitors who choose low-impact, slower-paced travel drawn by wildlife, coast, rivers, dark skies and outdoors	Encourages shoulder-season travel, dispersed exploration and stewardship-led experiences
Families & Multi-Generational	Families, often visiting friends and relatives (VFR) and repeat trips seeking safe, accessible places and shared experiences in towns, villages and along the coast	Supports year-round value in local services and facilities, especially in towns and smaller communities
Culture & Heritage Explorers	Visitors motivated by history, archaeology, arts & festivals	Drives longer dwell time and deeper engagement with Moray’s heritage, culture and creative economy
Premium International & Specialist Interests	High-value, low volume travellers (notably North America/Europe) seeking bespoke whisky, golf, fishing and country sport experiences	Focuses on premium curated itineraries featuring local produce and experiences with local small-scale operators

OTHER IMPORTANT SEGMENTS




MORAY'S EXPERIENCE CLUSTERS


HOW OUR VISITORS EXPERIENCE MORAY


Moray's diverse offer can be organised into five interconnected "experience clusters". These are not campaigns but structural foundations that reflect the region's identity pillars and relevance to the priority segments. These provide the basis for product development and infrastructure investment.


Each cluster is designed to:

 **Strengthen and join up what Moray already does well**

 **Fill gaps evident from engagement**

 **Connect communities, businesses and assets**

 **Drive shoulder season growth**

 **Spark entrepreneurial ideas**

 **Support micro-businesses and community groups**

 **Align with the new narrative for Moray**

OUR EXPERIENCE CLUSTERS EXPLAINED

EXPERIENCE CLUSTER	WHY IT MATTERS	PRIORITIES
 COASTS, HARBOURS AND MARINE LIFE	The coast is Moray's most distinctive asset but remains underpromoted and underinterpreted	<ol style="list-style-type: none"> 1. Moray Coastal Trail Enhancement 2. Coastal Wellbeing and Watersports 3. Harbours as Story Hubs 4. Marine Wildlife Experiences 5. Coastal Accessibility
 WHISKY, FOOD, DRINK AND CRAFTSMANSHIP	Whisky is the global anchor but its connection to place, people, food and heritage in Moray is underdeveloped	<ol style="list-style-type: none"> 1. Whisky Villages Experience 2. Taste of Moray Trail 3. Maker & Craft Routes 4. Premium Story-Rich Offer 5. Community Connections
 HERITAGE CULTURE & CREATIVITY	Moray's historical and cultural depth is exceptional but poorly connected across the destination and modestly promoted	<ol style="list-style-type: none"> 1. Moray Stories Network 2. Heritage Trail Network 3. Creative Moray Programme 4. Cultural Events Calendar 5. Interpretation Upgrades
 NATURE, OUTDOORS & WELLBEING	Moray's resources for outdoor activities on land and water are significant but underdeveloped, underpromoted and underconnected. Golf and Country Sports are at a premium level but offered in isolation to the wider Moray offer	<ol style="list-style-type: none"> 1. Dark Skies & Northern Lights 2. Trail Experiences 3. Wellbeing Moray 4. Moray 'More Than' Golf & Country Sport Days 5. Wildlife & Conservation 6. Accessible Infrastructure
 TOWNS, VILLAGES & COMMUNITIES	Strong identities and considerable volunteer effort, but towns and villages feel 'invisible'. Communities want visibility, pride and revitalisation	<ol style="list-style-type: none"> 1. Town Story Maps 2. Community Experience Programme 3. Town Centre Regeneration Alignment 4. Local Walks and Trails 5. Visitor Services Support

COLLABORATIVE MARKETING AND PRODUCT DEVELOPMENT

How We Promote and Package Moray

PRIORITY THEMES

Moray already demonstrates strong collaboration through its signature events, festivals and place-based initiatives. These activities provide a solid foundation for developing more joined-up products, shared storytelling and coordinated promotion that can strengthen Moray's offer, extend the season and support wider dispersal.

The following collaborative themes are not new attractions, but ways of connecting existing strengths, enabling communities, businesses and partners to work together around shared narratives and experiences, and collaborative product development.

 <p>SPIRIT OF SPEYSIDE – FROM FESTIVAL TO CONNECTED WHISKY EXPERIENCES</p> <p>Building on the festival's success to link distilleries with food, accommodation, heritage and communities, encouraging longer stays and deeper exploration across Moray.</p>	 <p>ARTS & CULTURE – CONNECTING CREATIVE MORAY</p> <p>Bringing together festivals, makers, venues and contemporary culture through shared storytelling and seasonal programming to strengthen visibility and local creative economies.</p>	 <p>MORAY WALKING & OUTDOOR FESTIVAL – SHARED EXPERIENCES, YEAR-ROUND VALUE</p> <p>Expanding collaborative walking, outdoor and wellbeing experiences that support slower travel, wider dispersal and off-peak visitation.</p>	 <p>TOURS & TRAILS – JOINED-UP JOURNEYS ACROSS MORAY</p> <p>Connecting coast, heritage, food and drink, nature and communities into trails presenting coherent themed journeys that make Moray easier to explore and give reasons to stay longer.</p>	 <p>GOLF – CONNECTING BEYOND THE COURSE</p> <p>Extending golf visits by linking courses and the timing of the golf experience with local food, culture, landscape and other outdoor experiences to deliver higher value and broader local benefit.</p>
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GUIDANCE FOR DELIVERY

HOW WE MAKE THIS HAPPEN

In the absence of a destination organisation, Guidance for Delivery is provided to support the initial steps and set out a road map that can evolve as momentum builds.

Delivery of Moray Tourism 2036 will be phased, partnership-led and responsive to Moray's capacity and context. Actions will build on existing strengths, collaborations and initiatives, supported by Guidance for Delivery that sets out priorities, roles and sequencing in more detail. This approach ensures the Strategy is current, practical and adaptable whilst focusing on long-term impact.

A LEADERSHIP STRUCTURE

Given the current void in leadership, a phased approach to establishing a new and agile destination leadership and collaboration structure is set out.

The first priority is inviting interest in creating a lean and agile tourism leadership group (TLG) comprising a small cohort of local industry leaders who represent the breadth of the offer and geography. This TLG will provide the voice of the industry and lead the scoping and transition to a robust and sustainable destination leadership structure for Moray which will provide an authoritative and cohesive industry overview as this strategy is implemented in full.

In parallel a Moray Strategic Tourism Partnership (STP) is proposed bringing the TLG together with key agency and support players, notably but not restricted to the council, VisitScotland, Highlands and Islands Enterprise, CNPA, FSB, Business Gateway, DYW and the Moray Chamber of Commerce. This partnership will champion Moray Tourism 2036 and growth of the visitor economy. In the early stages the STP is where strategic priorities will be agreed, support mechanisms developed, and new opportunities harnessed.



Its inter-relationship with and involvement in the new destination leadership structure will be reviewed over time.

A forum structure is then recommended to ensure geographic and themed interests have robust mechanisms to engage in tourism policy, activity and decision making.

A BLENDED FUNDING MODEL

Scotland's destination organisations are funded through many different mechanisms. In Moray a blended model is recommended drawing funds from a range of sources and evolving over time, ensuring businesses, agencies and communities can readily engage and have a voice. This blended model acknowledges the limitations the previous BID and any membership model provides where it focuses on the interests of members rather than the destination as an entity.

Moray Council has begun the pre-consultation stage on a potential Visitor Levy. This is an initial stage only, and no decisions have been taken; the levy may or may not progress. This Strategy neither assumes nor proposes a Visitor Levy. If a levy were ever to be introduced, it could form one of several potential funding sources to help support the long-term delivery of elements of this Strategy.

OUR STRATEGIC FRAMEWORK 2026-36

Our 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.

HOW WE ORGANISE DELIVERY

Eight delivery frameworks are provided to guide the implementation of this strategy and ensure a clear and robust road map is in place which can be amended and will evolve as time progresses. At its core Moray Tourism 2036 provides a strategic framework for

- **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.

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

OUR EIGHT DELIVERY FRAMEWORKS

OUR PHASED DELIVERY PLAN

1. Destination leadership in Moray



2. Destination collaboration and early actions in Moray

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

3. Moray’s identity, brand & promotion

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

4. Enterprise & investment in Moray

To strengthen Moray’s visitor economy as a driver of inclusive, place-based economic growth by supporting enterprises to adapt, collaborate and invest with confidence.

5. Community benefit & resilience across Moray

To ensure tourism strengthens local life across Moray by supporting community-led priorities,

sustaining volunteer endeavour, enabling fair work, and reinvesting in the places, services and people that make Moray distinctive.

6. Moray’s product & experience clusters

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

7. Infrastructure & investment across Moray

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

8. Climate nature & stewardship across Moray

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

Initial Steps (First 6–9 months)

Three simple 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 & events calendar.
3. Appoint a contractor/freelance team providing
 - a coordinator to support the TLG in its deliberations and actions, engage the industry and provide basic admin support.
 - a digital marketer to develop and manage the digital assets and digital content.
 - a destination development manager to progress the collaborative initiatives and product development.

Phase 1 (2026–2028) — Stabilisation

Focus: coordination, infrastructure, narrative, early wins.

- New destination leadership model scoped out
- Place branding and narrative for Moray developed
- Collaborative initiatives delivered
- Bookable experience clusters developed
- Annual tourism conference
- First Tourism Dashboard published
- Visible infrastructure improvements

Phase 2 (2028–2031) — Integration & Growth

Focus: product development, experience depth, collaboration.

- Destination leadership structure resourced and launched
- Full trails development, wayfinding & signage rollout
- Bookable experience clusters expanded.
- Major cultural & heritage interpretation upgrades

Phase 3 (2031–2036) — Maturity & Leadership

Focus: national leadership, premium experiences, regenerative tourism.

- Midpoint review of Moray Tourism 2036
- Premium story-rich experiences
- Integrated transport & visitor management
- Permanent destination body
- Effective measurement and storytelling of tourism impacts and benefits

MEASURING OUR SUCCESS

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.

A bespoke Moray Tourism Dashboard is recommended, designed to support transparency.


Key considerations will be gauging sentiment and demonstrating progress in:

 **Visitor experience and satisfaction**

 **Community benefit**

 **Business resilience**

 **Environment and Stewardship**

 **Collaboration and coordination**

“BY 2036, SUCCESS FOR MORAY’S VISITOR ECONOMY IS DEFINED BY CONFIDENCE, CONNECTION AND SHARED BENEFIT RATHER THAN SCALE OR VOLUME.”

KEY PERFORMANCE INDICATORS



Visitor Experience & Satisfaction

Visitor satisfaction
digital engagement
itinerary usage
repeat visitation
shoulder season
occupancy



Business Health

Business barometer
revenue stability
across seasons
workforce retention
and living wage
employers local
supply chain usage
number of bookable
experiences



Community Benefit

Number of
community projects
funded volunteer
hours supported
improvements to
toilets, signage,
trails community
satisfaction metrics
youth participation
numbers



Environment & Stewardship

Ranger reports
waste reduction
EV charging use
active travel metrics
biodiversity
engagement
initiatives



Collaboration & Coordination

TLG meeting
frequency
forum participation
annual conference
engagement
cross-sector
collaboration
outcomes
response times for
issues raised

MORAY SPEAKING FOR ITSELF

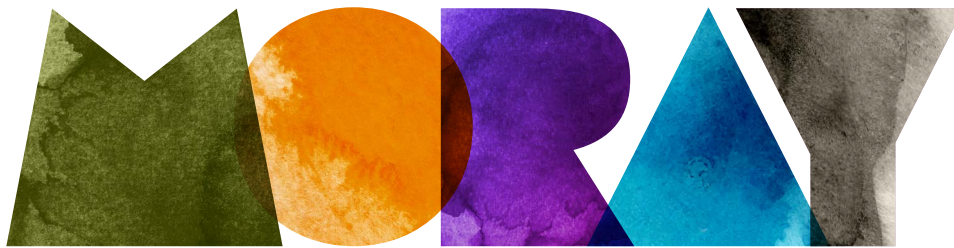
Moray lies between the Scottish Highlands, rural Aberdeenshire, and the Cairngorms National Park. Moray Tourism 2036 does not seek to compete, but to offer a distinctive alternative—one rooted in Moray’s people, places and values, and confident enough to stand alongside neighbouring destinations as a complementary and collaborative partner.

Through renewed leadership, stronger collaboration and a phased approach to delivery, Moray can steadily amplify its own voice while working constructively with neighbours to strengthen regional journeys, shared itineraries and mutual benefit. In doing so, Moray becomes easier to discover, easier to understand and easier to value—on its own terms.

This strategy is not about making Moray something it is not. It is about revealing what Moray already is: quietly exceptional, quietly creative and quietly welcoming. It provides the framework for Moray to be heard and to be visited by people who value what is on offer, engage with care and curiosity, and contribute positively to the places and communities they encounter.

In doing so, Moray Tourism 2036 ensures tourism delivers benefits that matter to local people, supporting communities, strengthening enterprise and protecting the places that make Moray special, now and into the future.

“MORAY ISN’T LOUD – IT WHISPERS. BUT IF YOU LISTEN CLOSELY, IT TELLS THE KIND OF STORY THAT STAYS WITH YOU...”



Moray Tourism 2036
Connected. Supported. Promoted

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