



SPEYSIDE COOPERAGE, CRAIGELLACHIE

MORAY SPEYSIDE PERFORMS – GENERAL TRENDS IN TOURISM & LATEST STATISTICS

OVERNIGHT
TRIPS
DOWN -4%
OVERNIGHT
SPEND
UP +5%

Source GBTS/IPS

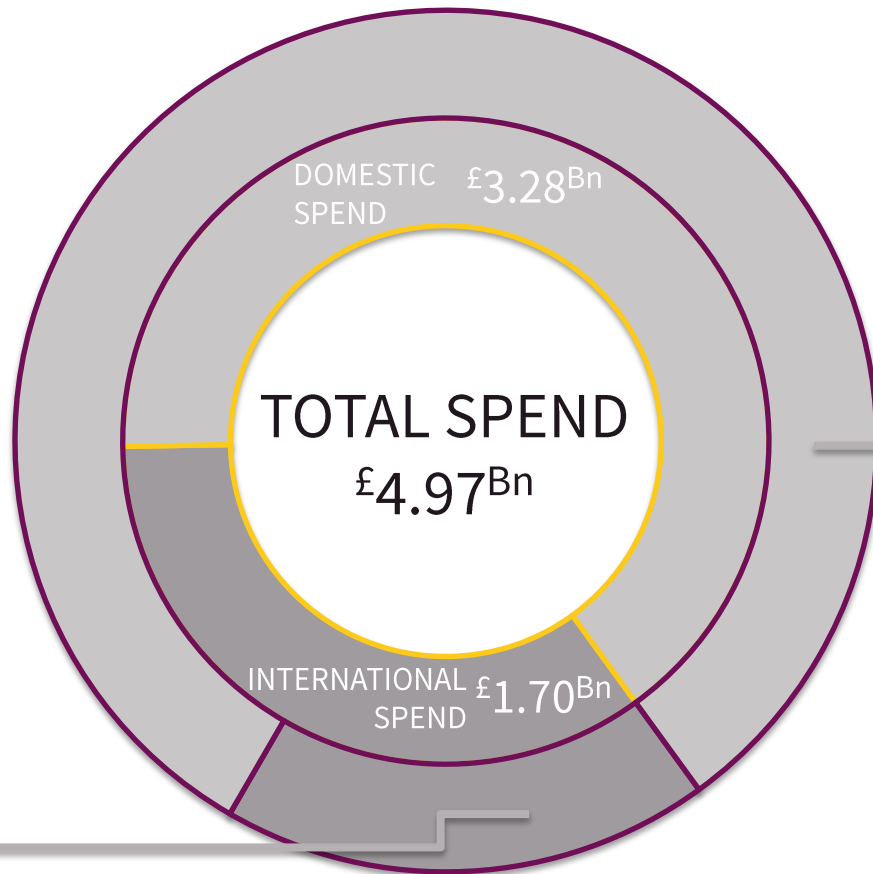


INBOUND TRIPS

NUMBER OF TRIPS

2.59M

Source IPS



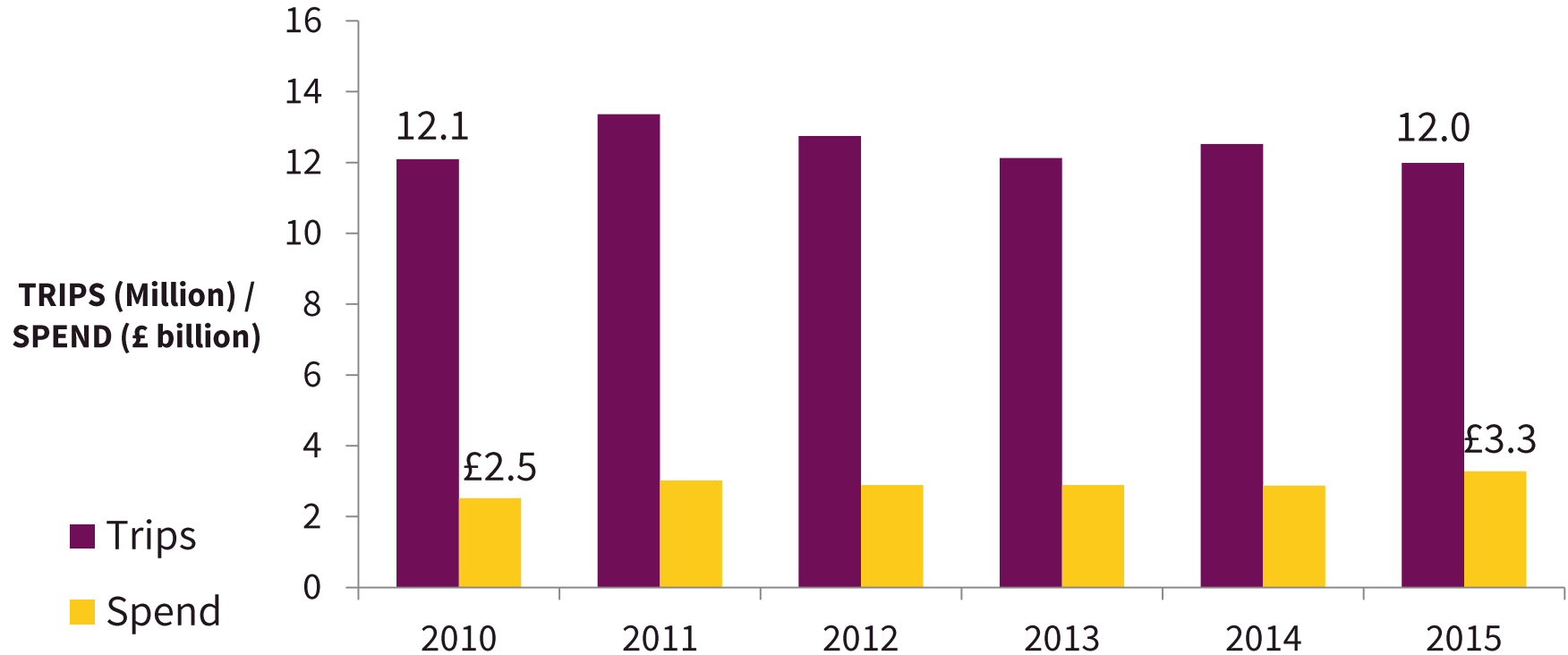
DOMESTIC
OVERNIGHT
TOURISM

NUMBER OF TRIPS

12.00M

Source GBTS

DOMESTIC TOURISM TIME-SERIES

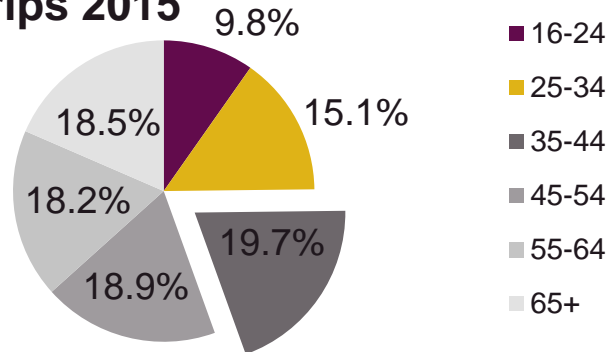


Source GBTS

PROFILE OF TOURISM IN 2015

Purpose of Trip	Trips		Spend	
	2015 Proportion	% Change on 2014	2015 Proportion	% Change on 2014
Total	100.0%	-4.2%	100.0%	14.2%
Pure Hol	53.1%	1.0%	63.1%	19.4%
VFR	28.9%	-14.2%	18.9%	-1.4%
Business	14.4%	-9.9%	15.3%	8.2%
Other	3.6%	66.2%	2.7%	93.5%

Age Group Proportion of Trips 2015

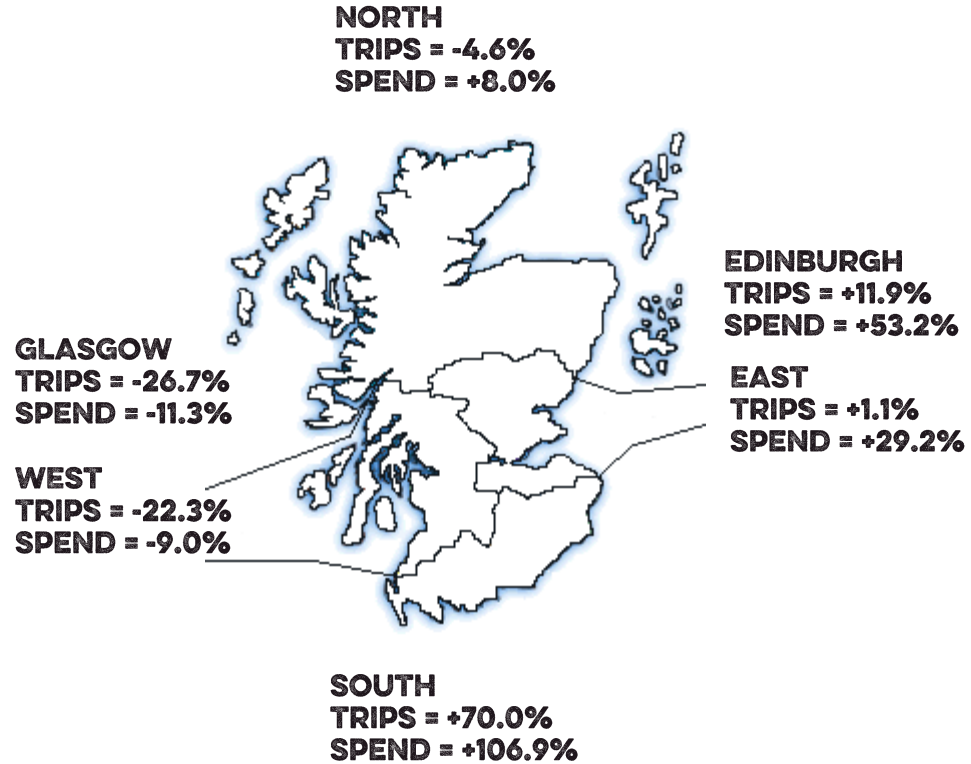
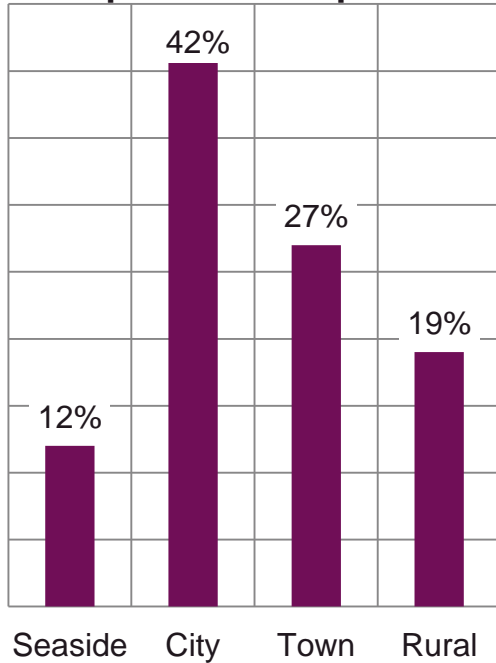


Region of Residence	Trips	
	2015 Proportion	% Change on 2014
Trips		
GB	100.0%	-4.2%
Scots	48.7%	-10.3%
RoUK	51.3%	2.4%
Spend		
GB	100.0%	14.2%
Scots	35.2%	-1.4%
RoUK	64.8%	24.9%

Source GBTS

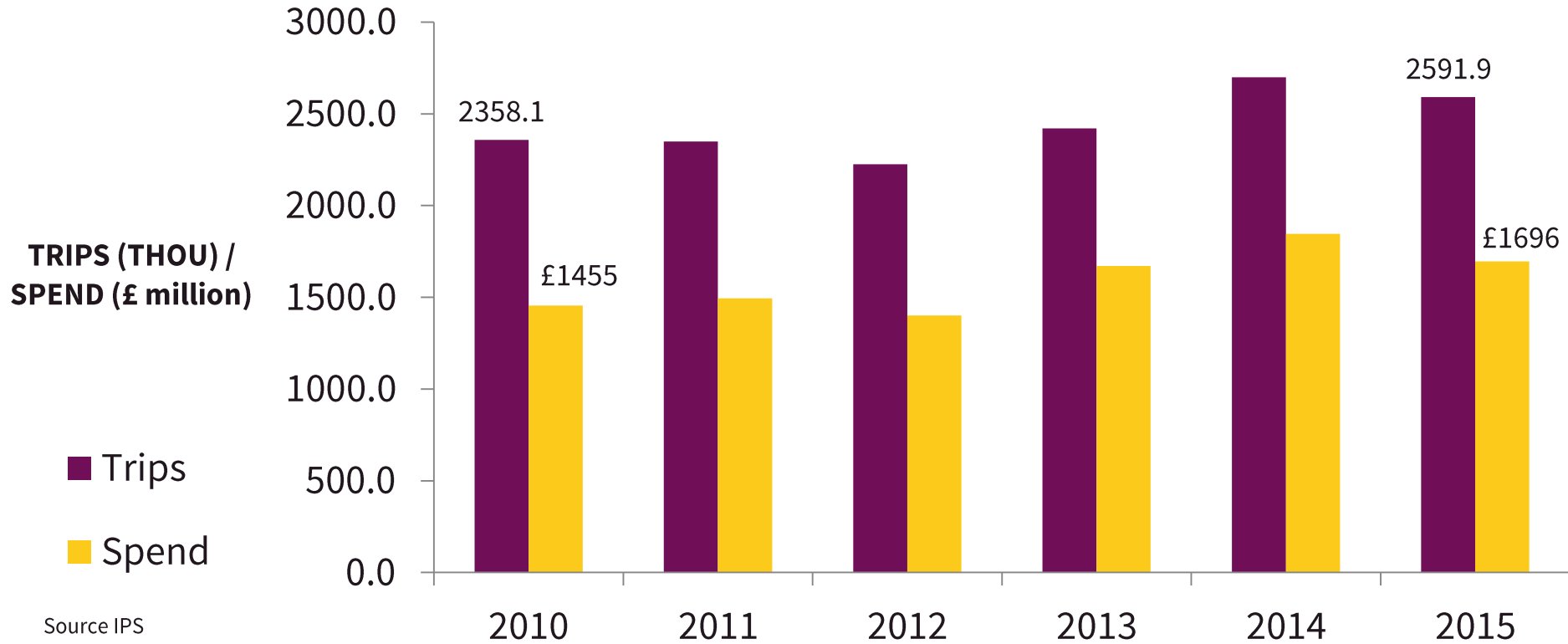
REGIONAL PERFORMANCE

Type of Place Visited
Proportion of Trips 2015



Source GBTS

INTERNATIONAL TOURISM TIME-SERIES



INTERNATIONAL MARKETS PERFORMANCE (TOP 5 MARKETS – 2015)

Rank	Country of Residence	Trips (thou)				Spend (£ millions)			
		2013	2014	2015	% Change 14/15	2013	2014	2015	% Change 14/15
1	USA	316	417	409	-1.9%	280	436	391	-10.3%
2	Germany	293	343	323	-5.8%	173	174	175	+0.6%
3	France	193	190	196	+3.2%	99	110	118	+7.3%
4	Netherlands	138	149	157	+5.4%	90	80	76	-5.0%
5	Spain	93	101	146	+44.6%	53	97	105	+8.2%

Source IPS

SOME OTHER FULL YEAR FIGURES FOR 2015

TOURISM DAY VISITS

- 124 million trips generating £3.9 billion
- Performance down against 2014.
- 2015 Trips are up against 2013
- 2015 expenditure lowest since 2011
- Lower fuel price, lower inflation and reduced eating out, shopping contributed to spend drop.
- Increase in activities and trips.

ACCOMMODATION OCCUPANCY

- Occupancy rates have been consistent in 2015 compared to 2014.
- Revenue per available room (RevPAR) fallen from price increases in 2014 due to Major Event influence.

Tourism Day Visits	2015	% Change
Trips	124m	-2%
Spend	£3.9 bn	-22%

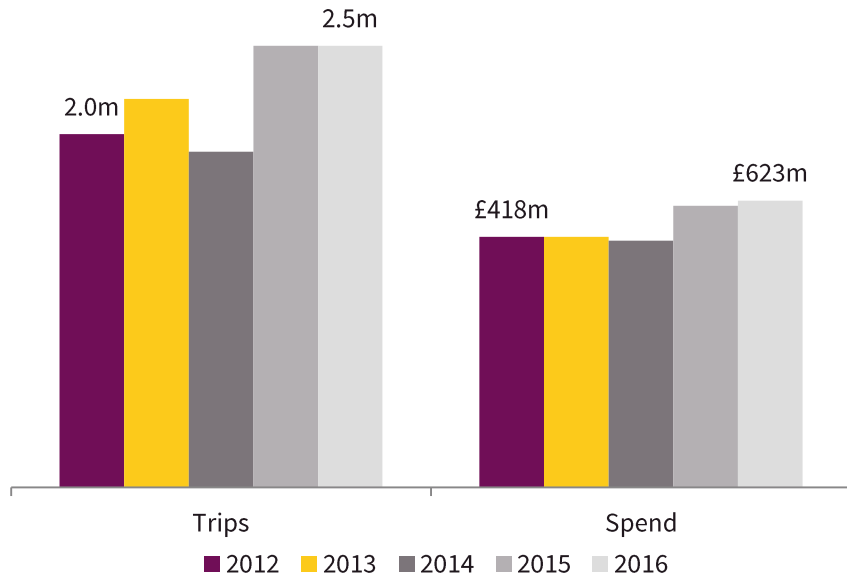
Source GBDVS/ VisitScotland Analysis

Occupancy	2015	% Point Change
Hotels	70%	0 pp
B&B	45%	- 1 pp
Self Catering	48%	+ 2 pp
Hostels	53%	+ 2 pp
Holiday Parks	41%	- 1 pp
RevPAR	£67.04	-£1.86

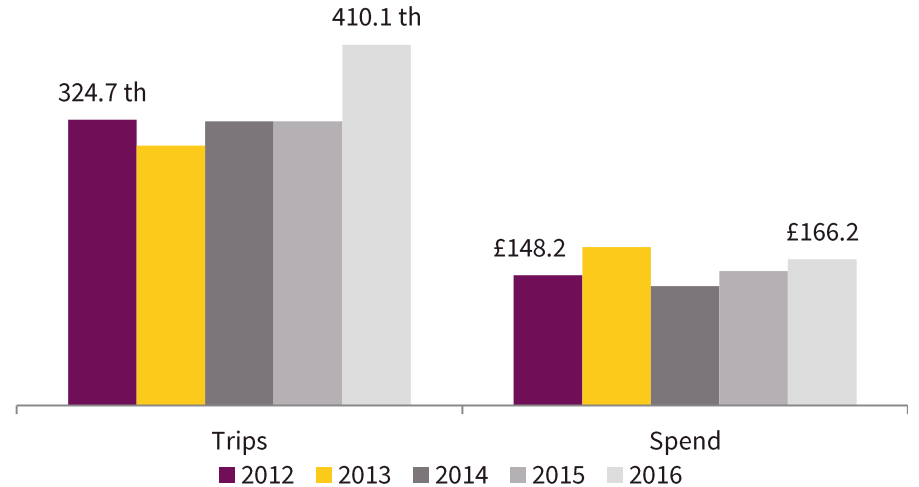
Source SAOS / VisitScotland Analysis

TOURISM IN SCOTLAND - 2016

Domestic Overnight Tourism January-March

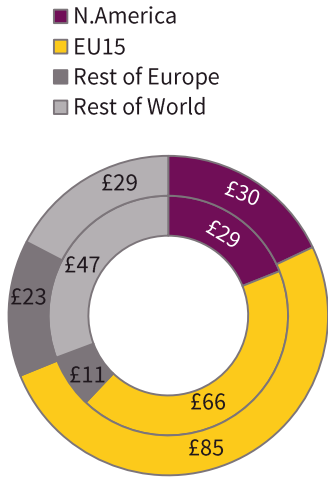


International Inbound Tourism Q1



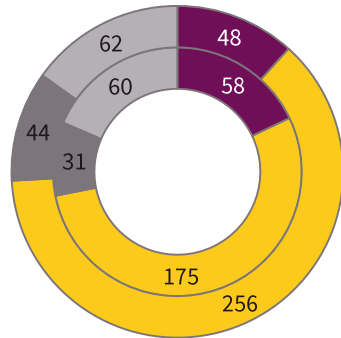
Source GBTS / IPS

TOURISM IN SCOTLAND - 2016



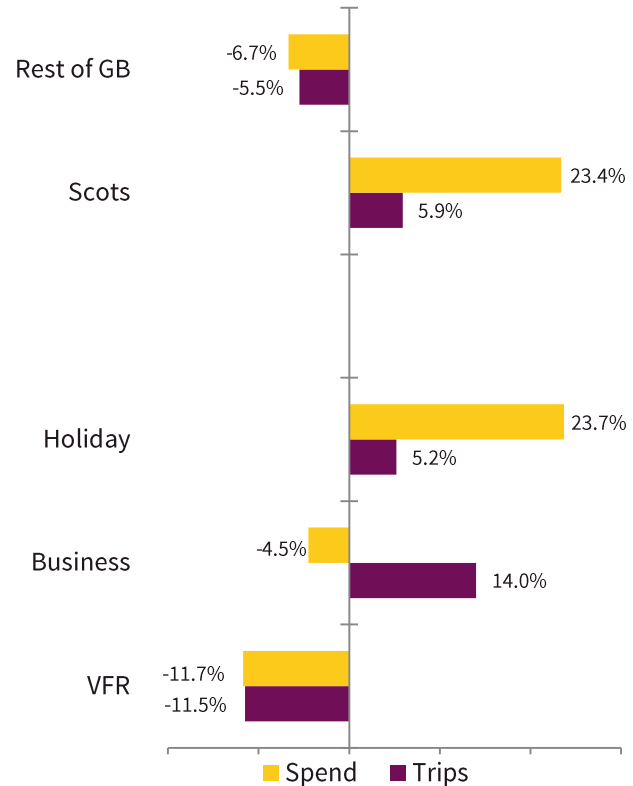
Inbound Tourism Spend by Market Sector - £ millions

Inbound Tourism Trips by Market Sector - Thousands



Source: IPS
Inner Ring = Q1/2015
Outer Ring = Q1/2016

Domestic Overnight Visits to Scotland
% Change Jan-Mar 2016/2015



Source GBTS

SCOTLAND'S REGIONAL DOMESTIC PERFORMANCE – Q1/2016

Trips taken in: Jan-Mar 2016	TRIPS (millions)			BEDNIGHTS (millions)			EXPENDITURE (£ millions)		
	2015**	2016	%ch	2015**	2016	%ch	2015**	2016	%ch
<i>GB Total</i>	23.598	23.418	-0.76%	58.655	59.840	+2.02%	£4,326	£4,368	+0.97%
<i>Scotland Total</i>	2.472	2.465	-0.28%	6.463	7.139	+10.46%	£595	£623	+4.71%
North	0.514	0.502	-2.33%	1.465	1.756	+19.86%	£135	£197	+45.93%
West	0.947	0.723	-23.65%	2.340	1.977	-15.51%	£213	£120	-43.66%
East	0.825	0.950	+15.15%	1.873	2.264	+20.88%	£197	£243	+23.35%
South	0.227	0.312	+37.44%	0.624	1.067	+70.99%	£48	£52	+8.33%

Source: GBTS

** Some entries for 2015 may differ from the Q1 2015 report due to changes in regional definitions resulting from applying the 2009 government boundary definitions to the data during 2015

SCOTLAND'S REGIONAL DOMESTIC PERFORMANCE – Q1/2016

Trips taken in: Jan-Mar 2016	Average length of stay (nights)			Average spend per night *			Average spend per trip *		
	2015**	2016	%ch	2015**	2016	%ch	2015**	2016	%ch
<i>GB Total</i>	23.598	23.418	-0.76%	58.655	59.840	+2.02%	£4,326	£4,368	+0.97%
<i>Scotland Total</i>	2.61	2.90	+10.96%	£92	£87	-5.14%	£241	£253	+4.87%
North	2.85	3.50	+22.74%	£92	£112	+21.94%	£263	£392	+49.21%
West	2.47	2.73	+10.53%	£91	£61	-32.97%	£225	£166	-26.22%
East	2.27	2.38	+4.98%	£105	£107	+2.22%	£239	£256	+7.02%
South	2.75	3.42	+24.36%	£77	£49	-36.36%	£211	£167	-20.85%

Source: GBTS

** Some entries for 2015 may differ from the Q1 2015 report due to changes in regional definitions resulting from applying the 2009 government boundary definitions to the data during 2015

2700

**TOTAL
TOURISM
EMPLOYMENT**



£56.5M

**MORAY
TOURISM
CONTRIBUTION
TO SCOTTISH
ECONOMY (GVA)**



11%

**OF ALL MORAY
EMPLOYMENT IS
FROM TOURISM**



£1.6^{BN}

**OVERALL SIZE OF
MORAY
ECONOMY
(SCOT GVT SABS)**



TOURIST SIGNPOST, FORRES, MORAY

VISITOR PROFILE - MORAY

- 76% of domestic overnight visitors are Scots residents.
- 57% of domestic expenditure is from Scots residents.
- Average spend per trip = £186
- Top international markets are: France / Germany / USA
- Top reasons for choosing to visit include the scenery and landscape, the history and recommendations.
- The most popular activities were walking, sightseeing, visiting historic buildings and trying local food.
- Overseas visitors were more likely to visit historic buildings while UK were more likely to take part in walking.

“

Nearly a third of visitors to the Highlands stayed in a B&B or guesthouse (45% of overseas visitors compared to 25% from the UK), 26% stayed in a hotel and 15% stayed in self-catering accommodation (18% of UK visitors vs. 8% from overseas). 13% stayed in a hostel.





THE OCCUPANCY SURVEY

- Statutory Monitor
- Voluntary Participation
- Covers Serviced & Non-Serviced
- Benefits for businesses
- Survey Outputs used for planning, investment, forecasting & modelling.
- Greater levels of participation regionally the more robust the results.



GLEN FIDDICH DISTILLERY STILL ROOM, DUFFTOWN, MORAY

PROFILE AND MONTHLY REPORTING FORMS FOR OCCUPANCY SURVEY

SERVICED ACCOMMODATION OCCUPANCY SURVEY 2015
COMMISSIONED BY VisitScotland

ESTABLISHMENT PROFILE FORM – STRICTLY CONFIDENTIAL

CODE

Please complete sections 1 – 9 below:

SECTION 1 – CONTACT DETAILS

Owner/Manager: _____ Tel: _____
 Person to contact (if not above): _____ Fax: _____
 Name of establishment: _____ Email: _____
 Address: _____
 Postcode: _____

How would you prefer to receive and return your monthly forms?
 Please tick one box only

Enter data using secure online system
 MG Excel file by email
 MG Word form by email
 Hard copy by post

How would you prefer to receive and return your monthly results?
 Please tick one box only

Access results using secure online system
 PDF file by email
 Hard copy by post

* PDF files require Adobe Acrobat Reader for viewing/printing. This software can be downloaded free of charge from www.adobe.com

SECTION 2 – NUMBER OF ROOMS/BEDS

Rooms: How many of the following do you have available for letting?

Single rooms

Double/twin rooms (2 bedspaces)

Family rooms (3 or more bedspaces)

Total number of rooms

Beds: How many guests can you normally accommodate (excluding any extra beds used only occasionally)?
 Number of extra/additional beds available occasionally, if necessary

SECTION 3 – TARIFF

What is the maximum tariff you charge per person (sharing a double/twin room) for bed & breakfast: if the rate charged is a room only rate, please give that tariff

a) during the peak season £ b) during the off-peak season £

During which months do you charge peak rates? _____

Is the tariff you have given above a room rate rather than a charge per person? Yes No

If yes, how much do you charge for breakfast? £

PLEASE CONTINUE AT SECTION 4 OVERLEAF

SECTION 4 – OPERATING SEASON

Is your establishment open all year? Yes No

If No, please give closure dates: From: ____/____/____ To: ____/____/____

SECTION 5 – CLASSIFICATION

Is your establishment a member of the VisitScotland Star-grading Scheme? Yes No

If Yes, please indicate below your ...

Star Rating: 1 Star 2 Stars 3 Stars 4 Stars 5 Stars Not graded

Type of Accommodation: Guest House B&B Guest Accommodation Farmhouse Country House Hotel Town House Hotel Serviced apartment

Hotel Small Hotel International Resort Hotel Lodges Budget Hotel Inn Restaurant with Rooms Metro Hotel

SECTION 7 – GREEN TOURISM BUSINESS SCHEME

Is your establishment a member of Green Tourism Business Scheme? Yes No

SECTION 8 – OWNERSHIP/GROUP MEMBERSHIP

Is your establishment ... Owned by a group OR Independent

If owned by a group, please give: Name of group: _____

SECTION 9 – LOCATION/SITUATION

Where is your establishment located? Mainland Island

How would you describe its situation? Please tick one box only

Desolate/coastal Large city/town Small town Countryside/village

Is it located within a National Park? Yes No

THANK YOU VERY MUCH FOR YOUR HELP IN PROVIDING THIS INFORMATION

OFFICE USE: BR PROFILE
 Free exc. Free int.
 IP by US/Can.
 Ask by Exc.

SERVICED ACCOMMODATION OCCUPANCY STUDY
COMMISSIONED BY VisitScotland

STRICTLY CONFIDENTIAL

Code _____

ESTABLISHMENT INFORMATION (Please enter information for this month):

If your premises were closed all month, please tick: The remainder of the form should be completed only if you were open for at least part of the month

Number of rooms available
 Number of guests you can accommodate
 Max charge this month for one person sharing double/twin room for B&B (inc VAT)

NOTES ON COMPLETING THE FORM:

Please complete the section above, giving your establishment information for this month.

When giving daily figures, it is not necessary for you to calculate the totals for the month unless you wish to do so.

If daily information is unavailable, please enter the monthly totals in the bottom row of the form.

Your occupancy rates are calculated on the basis of your normal capacity for guests and rooms. If these occasionally change – for example, beds and rooms temporarily out of use, or the occasional extra bed used, please complete the relevant capacity columns in the table on the right for any days affected by these changes.

Please exclude children in cots from your figures.

Please indicate clearly any days when you were closed for business by writing "Closed" in the relevant rows.

Date	Number of new guests checking in	Number of guests staying overnight	Number of bedrooms occupied	Please complete these columns only if capacity differs from your normal bedspaces or rooms	
				No of guests you can accommodate	No of rooms available for use
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					
Totals					

PLEASE RETURN THE COMPLETED FORM

Looking forward, how confident do you feel about prospects for your levels of business for:

a) The next 3 months? Very confident Quite confident Not very confident Not at all confident

b) The next 12 months? Very confident Quite confident Not very confident Not at all confident

OFFICE USE: IP Ver

2015 PARTICIPATION RATES FOR MORAY SPEYSIDE



HOTELS

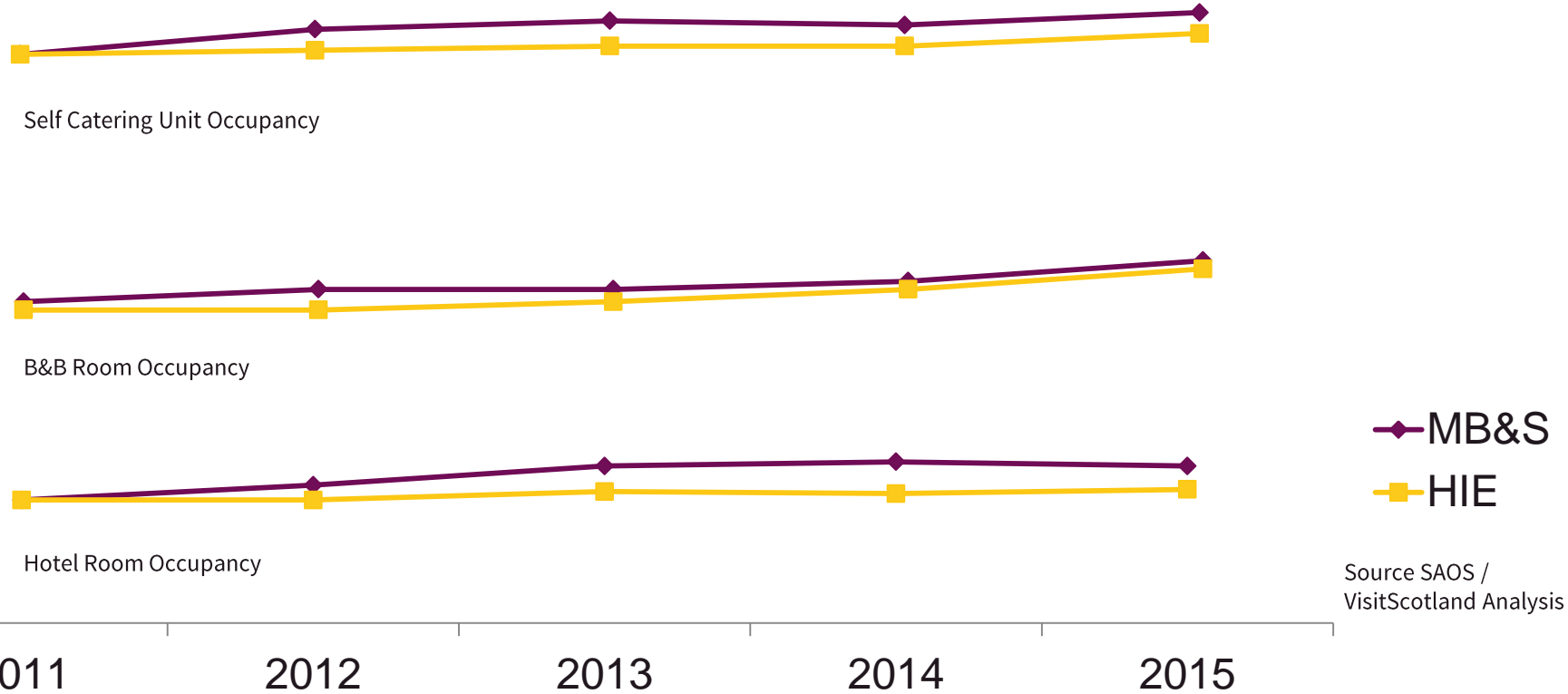
B&B /

The screenshot shows the VisitScotland website's search interface. At the top, there's a navigation bar with 'SCOTLAND | ALBA' and various menu items like 'DESTINATIONS', 'ACCOMMODATION', 'SEE & DO', 'HOLIDAYS', 'TRAVEL', 'ABOUT SCOTLAND', and 'EVENTS'. Below this is a search bar with a magnifying glass icon. The main search area is titled 'SEARCH FOR ACCOMMODATION' and contains several input fields: 'FIND' (set to 'Any Type'), 'LOCATION' (set to 'Moray'), 'WITHIN' (set to '10 mi'), 'CHECK-IN' (set to 'dd/mm/yyyy'), 'NIGHTS' (set to '1'), 'ADULTS' (set to '2'), 'CHILDREN' (set to '0'), and 'INFANTS' (set to '0'). There are also sliders for 'TOTAL PRICE OF STAY' (ranging from £0 to £5000) and 'OFFICIAL RATING' (5 stars). A 'KEY FACILITIES' section includes icons for WiFi, Pets Welcome, Parking, Level Access, Hearing Loop, and Accessible parking or drop-off point. A pink 'SEARCH >' button is located at the bottom right of the search area. Below the search area, it displays '179 SEARCH RESULTS'.

The screenshot shows the Airbnb search interface. At the top left is the Airbnb logo. To its right is a search bar with a magnifying glass icon and the text 'Moray'. Below the search bar are input fields for 'Dates' (with 'Check In' and 'Check Out' sub-fields), '1 Guest', and 'Room Type'. The 'Room Type' section has three options: 'Entire home/flat' (checked), 'Private room' (unchecked), and 'Shared room' (unchecked). A 'Filters' button is located at the bottom left. At the bottom right, it says '197 Rentals · Moray'. At the very bottom, there is a small copyright notice: '© Enter dates to see full pricing. Additional fees apply. Taxes may be added.'

Source SAOS / VisitScotland Analysis

OCCUPANCY RATES FOR KEY SECTORS HAVE REMAINED CONSISTENT... AND SPARE CAPACITY REMAINS?



Source SAOS /
VisitScotland Analysis



SCOTTISH TOURISM PERFORMANCE HAS SHOWN GROWTH

**MORAY TOURISM IS A MAJOR CONTRIBUTOR TO THE
BROADER REGIONAL ECONOMY.**

**OCCUPANCY IS A KEY METRIC IN MEASURING TOURISM
PERFORMANCE. SUSTAINED AND CONSISTENT
PARTICIPATION CONTRIBUTES TO AN ACCURATE MEASURE
FOR STRATEGIC PLANNING.**



SPYNIE PALACE, NEAR ELGIN, MORAY

THANK YOU

#SCOTSPIRIT

SCOTLAND | ALBA