

The Edinburgh Visitor Survey is a continuous survey amongst visitors to Edinburgh undertaken by Lynn Jones Research using Visitrac. For background on the study please go to: <http://www.etag.org.uk/market-intelligence.asp>.

This document is one of a series that will provide an overview of the responses provided by visitors on a monthly basis. The full year survey findings will be published in November 2010.

City context

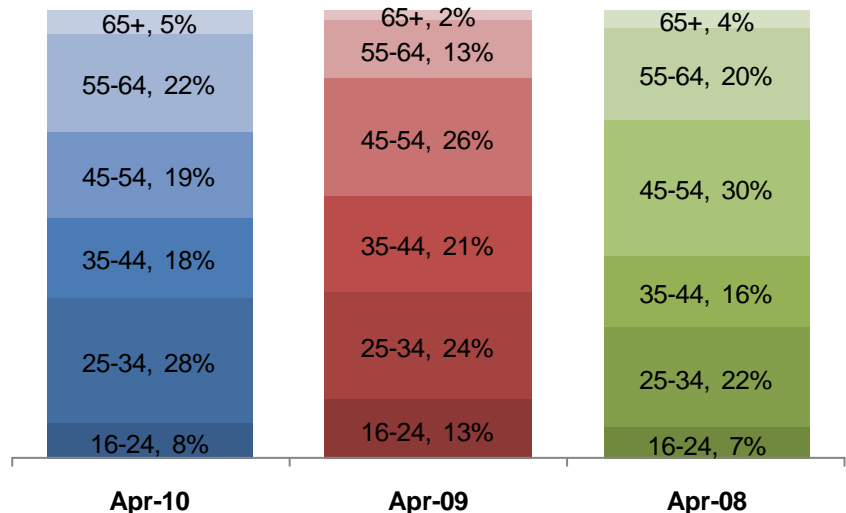
- UK consumer and investment spending patterns appear to have stabilised and in some cases grown after a preceding period of decline as indicated by The Bank of England's Agents' Summary in early May 2010.
- The volcanic ash cloud disruption blighting air travel for much of the latter half of April may have resulted in some dispersion of activity impacting the tourism sector.
- Edinburgh boasted above average levels of sunshine in April. The impact of the Easter weekend during the month along with the International Science Festival will have helped to drive demand for tourism businesses.

Profile of visitors

An even split of male-female visitors to the city was recorded in April 2010¹.

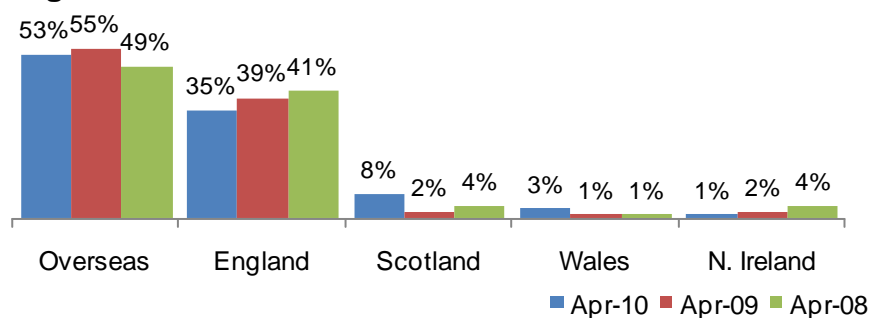
The age profile differed somewhat to previous years. The evidence suggests that this year the city has welcomed a comparatively older profile of visitors than last year.

Age Groups



The international appeal of the city was highlighted with 53% of respondents from overseas countries. The United States (24% of overseas visitors) was the key international market followed by France (9%), Netherlands (8%), Australia (7%) and Germany (7%).

Origin



For two consecutive years there was a decline in visitors from England falling from 41% in April 2008 to 39% in April 2009 to the current level of 35% in April 2010.

Visitors from within Scotland markedly increased over previous years and accounted for 8% of the monthly sample.

1. Based on sample of 168 visitors to Edinburgh in April 2010.

Trip planning and influences

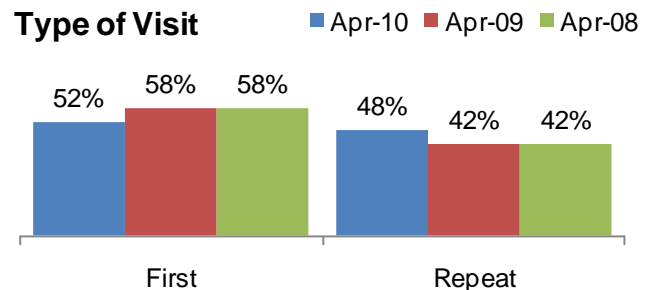
The history of the city continues to be the key influence on the decision to visit mentioned by 75% of respondents. The castle is also a major draw and was considered by 50% of visitors to be an influence on their decision to visit.

Over three-quarters of visitors accessed information prior to visiting Edinburgh. Amongst those doing so, guidebooks continue to be the most popular form of information cited by 48% of visitors in April. The websites www.visitscotland.com (43%) and www.edinburgh.org (38%) were also common reference points for visitors before visiting.

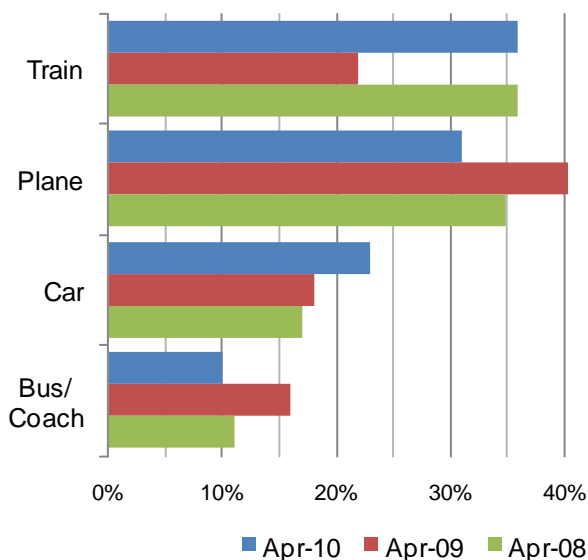
Over 80% of visitors in April 2010 booked at least one aspect of their trip online before visiting the city. The three most popular aspects for online booking were accommodation (78%), flights (43%) and train tickets (32%).

Visit characteristics

First time visitors accounted for 52% of respondents falling from previous years largely due to an increase in the proportion of visitors from within Scotland this year.



Getting to Edinburgh



During a month of much air travel disruption it is not surprising to note that the proportion of visitors arriving by plane was down on previous years to 31% in April 2010. Train was the most common method of transport to Edinburgh in April 2010 used by 36% of visitors.

95% of visitors were staying away from home overnight when they visited Edinburgh.

Of those visitors staying away from home, 94% stayed in Edinburgh itself (up from 86% last year). The average length of stay amongst those guests was 3.02 in line with previous years.

Mid range hotels were the most popular form of accommodation used by overnight guests in the city (30%) registering a significant increase on previous years. Meanwhile, standard/budget hotel usage fell from previous years' levels to 15%. These findings may indicate a willingness on behalf of the visitor to upgrade certain aspects of their trip in April 2010 or, perhaps, may be a result of the competitive rates offered by many mid range hotels?

Fewer claimed to have stayed in a hostel with 7% in April 2010 compared to 15% in April 2009 and 16% in April 2008.

Activities undertaken

Walking around was the most popular activity amongst visitors (94%). Eating out, shopping and going to visitor attractions were also common activities referenced by over 70% of visitors.

Visitors were asked specifically about visitor attractions, museums and galleries they visited in the city - 96% visited at least one. The most popular site was Edinburgh Castle visited by 73% of visitors. St Giles' Cathedral, Palace of Holyroodhouse, National Museum of Scotland and National Gallery of Scotland complex were visited by at least 20% of those who visited attractions.

Painting by numbers: The Edinburgh Experience

The key findings of visitors' evaluation of the Edinburgh tourism experience are summarised below and compared against the same figures from last year. The coloured arrows indicate whether the rating has increased or decreased from 2009 to 2010².

Visitors rated the standard of customer service received at various touchpoints in the city.

Customer Service Ratings		Apr-10	Apr-09
Attractions	↑	8.75	8.62
Visitor Information Centres	↑	8.50	8.10
Accommodation	↑	8.50	8.36
Restaurants	↓	8.33	8.43
Pubs	↑	8.22	8.12
Shops	↑	8.20	8.09

Visitors were also asked to rate their overall impressions of the city.

City Ratings		Apr-10	Apr-09
Safety	↑	8.40	8.28
Cleanliness	↑	7.98	7.92
Value for Money	↓	7.44	7.73
Overall	↓	8.75	8.85

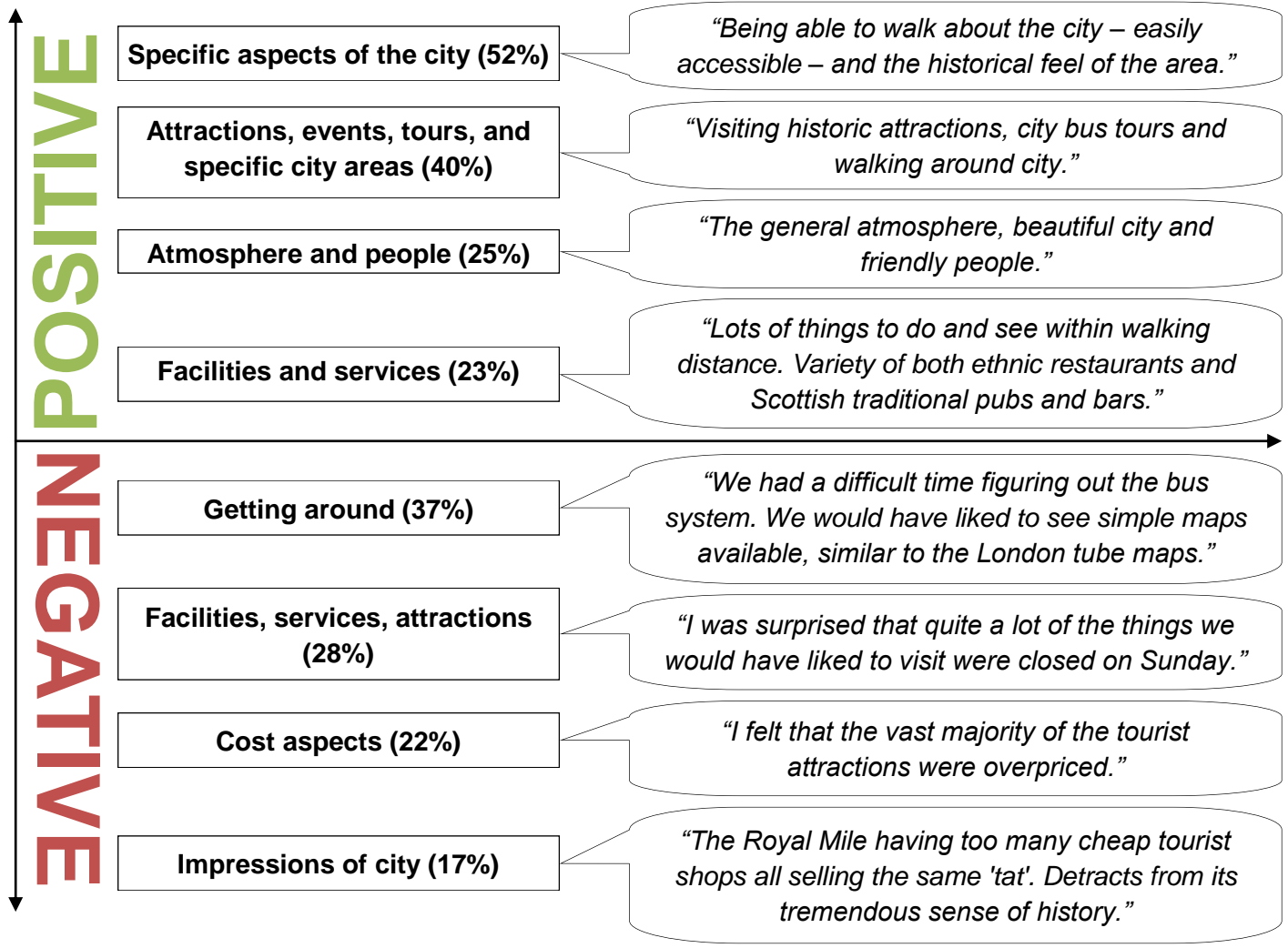
Customer service scores at visitor touchpoints across the city compare very favourably to those achieved in April 2009 - only service in restaurants has fallen slightly (around 1%) from its 2009 level.

In relative terms, the most significant year-on-year change in city ratings was observed in the perception of value for money falling nearly 4% from 7.73 in April 2009 to 7.44 in April 2010. Falls in the value of the Euro and American dollar in relation to the British pound compared to April 2009 may be one contributing factor to this occurrence.

2. Tables below use a rating scale from 1 to 10, where 1 is very poor and 10 is very good.

In the words of the visitor: Kudos and brickbats!

Key areas regularly commented on by visitors to the city during April 2010 are displayed below along with some examples of visitor comments³:



Tourist expenditure

Information collected on the levels of expenditure made by visitors to the city on key aspects indicates that the average daily expenditure figure per visitor per day in April 2010 was £79.40 which represents an increase of 4.9% from April 2009.

Overall Expenditure	2010	2009	2008
Accommodation	£34.70	£30.50	£25.30
Eating & drinking in cafés, pubs & restaurants	£19.80	£20.70	£23.30
Shopping	£12.30	£12.30	£14.20
Entertainment (including visits to attractions, events & tours)	£8.60	£7.30	£8.70
Travel & transport in Edinburgh	£4.00	£4.90	£3.60
Total	£79.40	£75.70	£75.10

3. Based on a sample of 126 visitors' comments on the best/most enjoyable aspect of their visit and 102 visitors' comments on aspects that could have been improved. Percentages indicate the frequency each key area was commented on by visitors.