

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 providing an overview of the responses given by visitors on a monthly basis. The full year survey findings will be published in November 2010.

City context

- Edinburgh recorded above average levels of sunshine during an action packed month which saw the city host a number of major events, including the Edinburgh Marathon, Magic Rugby League Weekend and the 'Taste of Edinburgh' food festival.
- In early May 2010 the Bank of England voted unanimously to retain interest rates at 0.5% despite concern of rising inflation in the UK.
- The Conservatives and the Liberal Democrats form a coalition government after Britain has a hung parliament following the May 6th election. Announcements of future reductions in levels of public sector expenditure shortly follow.

Profile of visitors

Female visitors to Edinburgh outnumbered male visitors by a ratio of around 1.4:1¹.

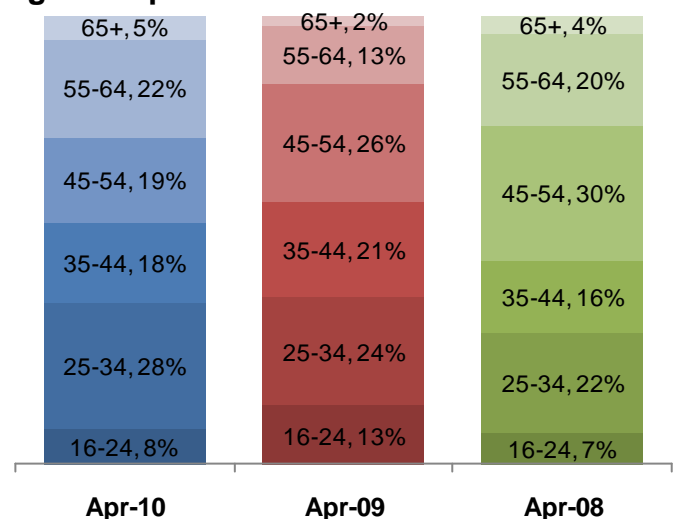
The city welcomed a comparatively older profile of visitors in May 2010 compared to previous years. However, the appeal of the city amongst visitors in the younger age groups remains strong - 39% of visitors in May 2010 were aged 34 years or under.

The international contingent of visitors to the city during the month, as in previous years, exceeded domestic markets. In May 2010 nearly 60% of visitors from over 20 overseas countries responded to the survey. American visitors accounted for the largest overseas group - 21% in May 2010. German visitors were the second most common overseas market (9%).

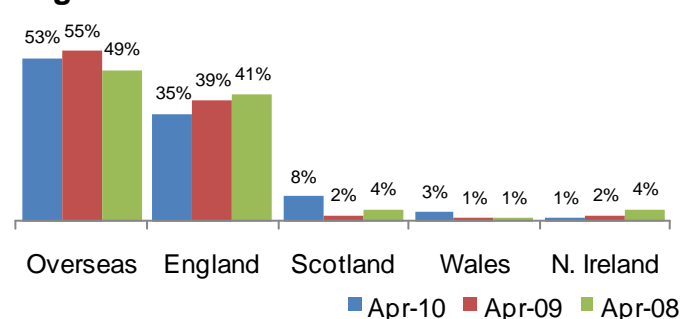
Broadly in line with previous years, visitors from England comprised 32% of the sample with visitors from London making up nearly a quarter of these respondents.

An increase from previous years is noted in the proportion of visitors from within Scotland in May 2010, although Scottish visitors continue to account for less than 10% of the sample.

Age Groups



Origin



1. Based on sample of 101 visitors to Edinburgh in May 2010.

Trip planning and influences

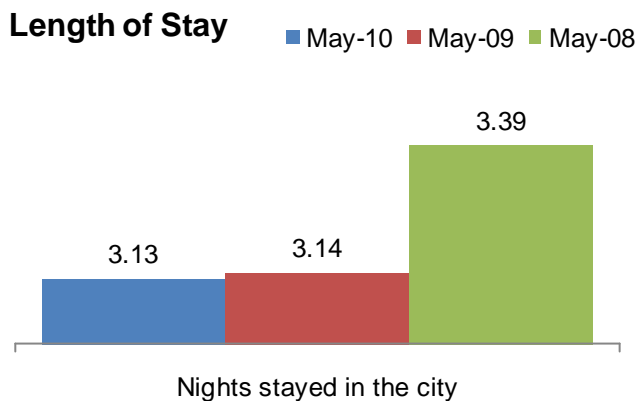
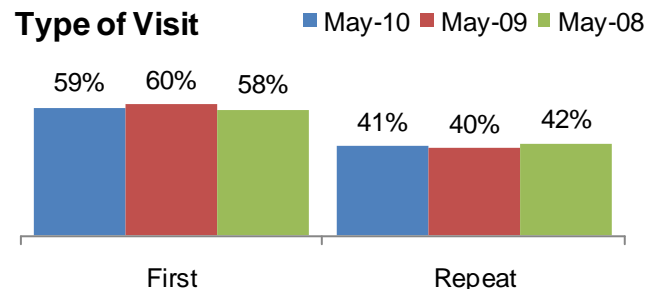
The historical significance of the city continues to play a major role in drawing visitors with 76% citing this aspect as an influence on their decision to visit. The Castle (59%) was also an important driving factor on the decision to come to Edinburgh. Around 15% of visitors in May 2010 appear to have been attracted to the city by an event which is a significant upturn on last month.

Pre-visit information research was undertaken by 81% of visitors. The most commonly consulted information resource prior to coming to the city was guidebook (58%). Websites also played a significant role in providing information before the visit - www.visitscotland.com (37%), www.edinburgh.org (29%) and other websites (32%).

90% of visitors booked at least one aspect of their trip online before coming to Edinburgh. Accommodation was the most popular aspect to be booked online followed by flight (58%) and train (26%). In a month when volcanic ash continued to disrupt air travel it is interesting to note a fall in the proportion of flights booked online from 68% in May 2009 to 58% in May 2010.

Visit characteristics

First time visitors continued to outnumber repeat visitors to the city in May 2010. Making the right impression on these visitors will help to encourage them to return again and spread the word about Edinburgh. Personal recommendations play an important role in bringing visitors to the city - a quarter of visitors in May 2010 cited a personal recommendation as an influencing factor on their decision to visit.

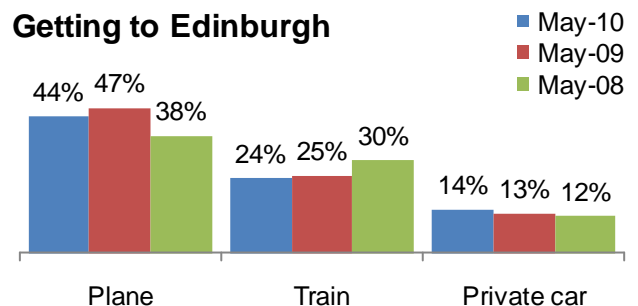


Down slightly on previous years, 92% of visitors were staying away from home when they were in Edinburgh. The vast majority (98%) of these visitors stayed in the city itself for an average of 3.13 nights during a month in which hotel occupancy registered 87% (up from 80% in May 2009)².

Mid range hotels continue to be an increasingly popular choice amongst overnight visitors increasing from 14% in May 2009 to 25% in May 2010. Meanwhile, an opposite trend was apparent amongst budget hotels falling from 24% in May 2009 to 11% in May 2010.

The airport was the main arrival point of visitors during the month (44%) down slightly from May 2009 despite the re-introduction of the popular Barcelona-Edinburgh route. Train was the main form of arrival for 24% of visitors and private car 14%.

Whilst in the city, 50% of visitors used public buses and rated them favourably above 8 out of 10. Public parking was used by over half of visitors arriving by car and, as in previous years, aspects like signposting and ease of parking were rated consistently below 8 out of 10.



2. Source: Edinburgh LJ Forecaster May 2010.

Activities undertaken

Visitors were asked about the range of activities they had done whilst in the city. Walking around the city was the most frequently undertaken activity (96%). Shopping (77%), going out to restaurants (76%), visiting attractions (73%) and going out to pubs/bars (65%) were also popular activities amongst visitors.

99% of visitors indicated they went to attractions and/or general tourist locations in the city. The Castle was the most popular site visited by 76% of these visitors. St Giles' Cathedral, Arthur's Seat, Palace of Holyroodhouse, National Gallery of Scotland and National Museum of Scotland were also popular referenced by at least 20% of visitors.

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 2010³.

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

Customer Service Ratings		May-10	May-09
Attractions	↑	8.56	8.50
Visitor Information Centres	↓	7.80	8.37
Accommodation	↑	8.19	7.83
Restaurants	→	8.20	8.20
Pubs	↓	8.16	8.20
Shops	↑	8.06	7.96

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

City Ratings		May-10	May-09
Safety	↓	8.32	8.44
Cleanliness	↑	8.00	7.91
Value for Money	↓	7.46	7.56
Overall	→	8.75	8.75

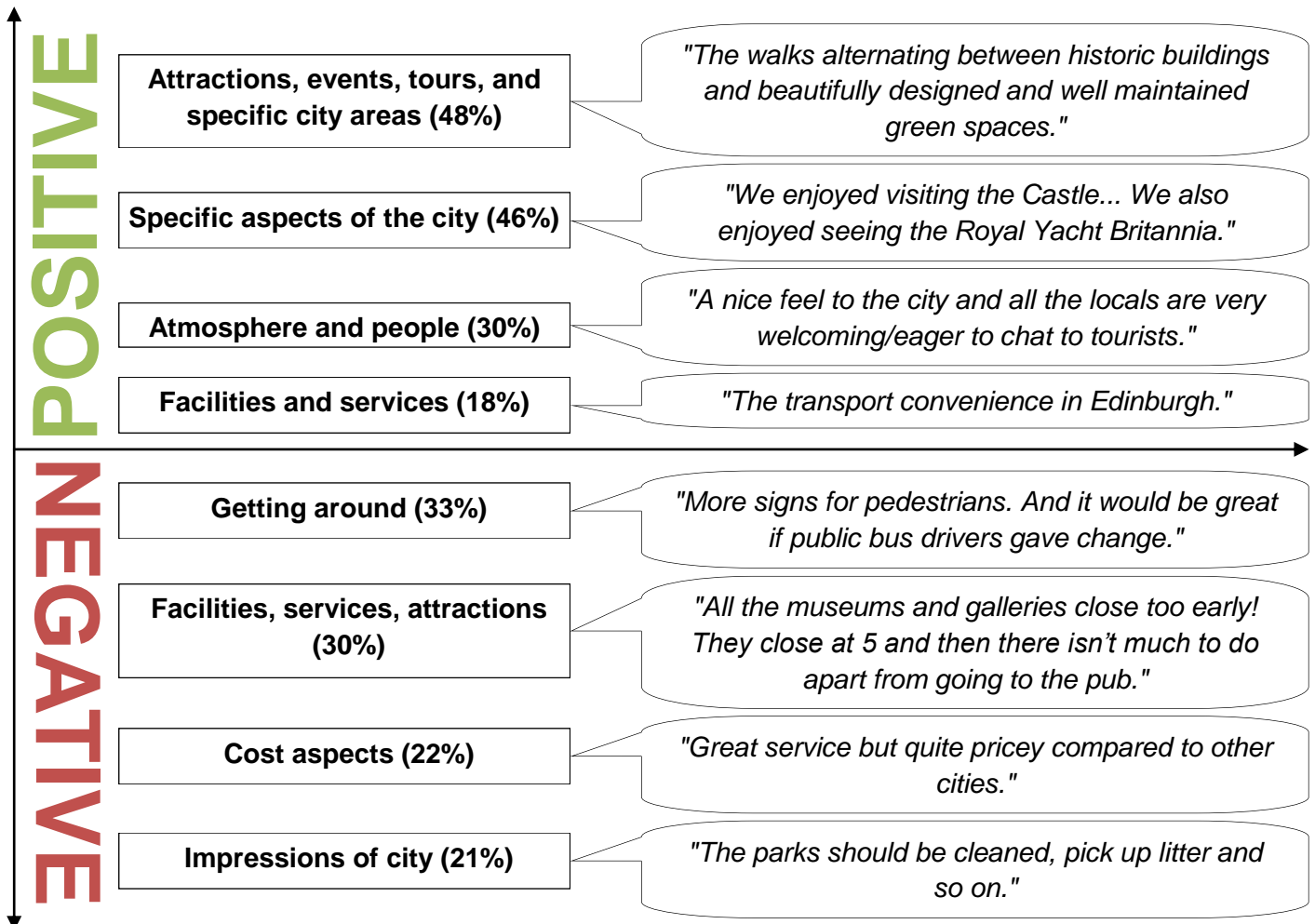
A mixed picture is apparent amongst the ratings of customer service at key facilities and services in the city. Most notably, visitor information centres were rated less favourably compared to last year - falling 7% from 8.37 in May 2009 to 7.80 in May 2010. Attractions continue to outperform other areas of the city with regards service.

Relatively small changes from year-to-year were noted in the overall perception of the city. In overall terms, the city was rated exceptionally highly at 8.75 out of 10 with 46% of visitors indicating they were very likely to recommend Edinburgh as a place to visit.

3. 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 May 2010 are displayed below along with some examples of visitor comments⁴:



Tourist expenditure

Expenditure on eating and drinking along with entertainment and transport has increased year-on-year since 2008.

The average tourist to Edinburgh spent £77.50 per day whilst in the city in May 2010 constituting an increase of 4.9% in relative terms from May 2009.

Overall Expenditure	2010	2009	2008
Accommodation	£31.50	£32.90	£23.90
Eating & drinking in cafés, pubs & restaurants	£21.80	£19.30	£15.60
Shopping	£11.90	£10.80	£11.70
Entertainment (including visits to attractions, events & tours)	£7.80	£6.80	£6.10
Travel & transport in Edinburgh	£4.60	£4.00	£3.00
Total	£77.50	£73.90	£60.40

4. Based on a sample of 81 visitors' comments on the best/most enjoyable aspect of their visit and 66 visitors' comments on aspects that could have been improved. Percentages indicate the frequency each key area was commented on by visitors.