

Edinburgh Visitor Survey, 2007

Draft Report

Prepared by

TNS Travel & Tourism

Prepared for

Edinburgh Tourism Action Group

EDINBURGH TOURISM
ACTION GROUP **ETAG**



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Summary of key findings



Summary

Context

- **3.5 million overnight tourist visits** were made to Edinburgh during 2006 (Source: VisitScotland)

Profile of visitors

- Overall, the largest proportion of visitors to Edinburgh were aged under 35 (47%) and the vast majority were not accompanied by children aged under 16 (93%).
- The age profile of staying visitors was particularly young (50% under 35) while a larger proportion of day visitors were in the Empty Nester lifestage (34%).
- Around half of visitors lived in the UK (48%), 26% lived in Europe and 26% lived further afield. The main overseas countries of origin were the USA, Germany, Australia, France and Spain.



Summary

Profile of visits

- Two-thirds of visitors (67%) were on a holiday to Edinburgh, 16% were on a day out and 12% stated that their main trip purpose was to visit friends or relatives.
- Around half of visitors had never been to Edinburgh before – a proportion which increased to 61% amongst overnight visitors, 69% amongst Europeans and 81% amongst other International visitors.
- Amongst overnight visitors, UK residents spent an average of 2 or 3 nights in Edinburgh while international visitors spent an average of 5 or 6 nights in the city.
- The most used accommodation types during overnight visits were hotels (41%), hostels (18%), the homes of friends and relatives (17%), Bed and Breakfast accommodation (9%) and Guest Houses (8%).
- Around half of overnight visitors travelled to Edinburgh by air (52%) while day visitors were more likely to travel by rail (39%) or private car (34%).



Summary

Motivations and influences

- The 'top' reasons for visiting related to Edinburgh being a historic city and the capital of Scotland, friends or relatives living in the city, the festival(s) and specific visitor attractions.
- The historic elements of the city were particularly likely to motivate overnight visitors while day visitors were more likely to visit to see friend or relatives, to visit a specific attraction or to attend an event.
- Items most likely to influence decisions to visit were personal recommendations, previous experiences, the Internet, guidebooks and travel articles.
- While day visitors were most likely to be influenced by previous experiences, recommendations were more likely to influence staying visitors.
- Visitors were most likely to be impressed with Edinburgh's architecture and buildings and the friendly people but likely to seek lower prices or better car parking, bins and public transport.



Summary

TRI*M Analysis

- Edinburgh received positive responses when rated in terms of **overall performance** (85% excellent/very good), **likelihood to recommend** (95% definitely/probably), **likelihood to revisit** (82% definitely/probably) and **advantage over other destinations** (84% very big/big advantage).
- As such Edinburgh received a high overall TRI*M Index of **97**, slightly higher than the typical index we would expect (low to mid 90s).
- The TRI*M Grid analysis identified the following overall strengths of the product and priorities for improvement:
 - **Strengths which drive the quality of experience** – general atmosphere, historic attractions, friendly people, safety, museums & galleries.
 - **Top priorities which should be improved** – provision of things to do, standards of service, range of overnight accommodation available.
 - **Secondary priorities also perceived by visitors as important** – cleanliness of streets, activities/facilities for children, transport facilities, information for visitors, value for money, pubs that cater for families.

Summary

Trends 1998 to 2007

- A range of data sources indicate that the number of visitors to Edinburgh has increased, reflected by an increase in the supply of accommodation and the availability of direct air routes.
- The demographic profile of visitors has remained fairly constant over this period with a predominance of young overnight visitors.
- However, an increasing proportion of visitors are from overseas, especially Europe.
- The average duration of overnight visits has decreased with an increasing proportion of visitors on short breaks of 1 to 3 nights.
- An increasing proportion of visitors are using budget and moderate quality hotels and hostels.
- An increasing proportion of visitors are flying directly to Edinburgh.



Background and method



Background and method

- **TNS Travel and Tourism commissioned by VisitScotland, City of Edinburgh Council and Scottish Enterprise Edinburgh to undertake a survey of visitors to Edinburgh**

- **Key objectives of survey were:**
 - Supply information about visitors and their visit in order to guide future tourism policy and activity
 - Profile visitors and their evaluation of Edinburgh as a tourist destination
 - Gather data which can be compared to previous studies and updated in future studies, to enable changes to be tracked over time

- **Fieldwork from January 2007 to January 2008.**
- **738 face to face, CAPI interviews with a representative sample of day and staying visitors*. Results accurate to +/-3.6%.**
- **Day visitors defined as non-residents of Edinburgh on visit for leisure purposes lasting at least 3 hours.**

*See appendix for details of interview locations

Context



Volume of visits to Edinburgh

- **During 2006 3.5 million overnight visits were made to Edinburgh (2.2m UK residents and 1.2 million overseas visitors).** (Source: VisitScotland)
- **In the last decade visitor numbers have increased:**
 - Number of overseas visits up by 24% (1996 to 2006, International Passenger Survey)
 - Number of visits to 'top 5' attractions increased by 18% (1996 to 2006, VisitScotland*)
 - Average hotel room occupancy increased from 69% to 76% (1998 to 2006, VisitScotland)
- **Supply has also changed:**
 - 19% more serviced accommodation and 114% more hostel accommodation (1998 to 2006, Tourism Resources Company 2006)
 - The number of direct international routes to Edinburgh has increased from 24 to 70 (1996 to 2006, BAA)

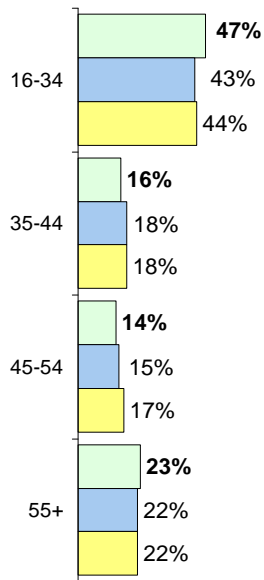
*Edinburgh Castle, National Gallery of Scotland, National Museum of Scotland, Edinburgh Zoo and Royal Botanic Gardens.

Main results – visitor profile

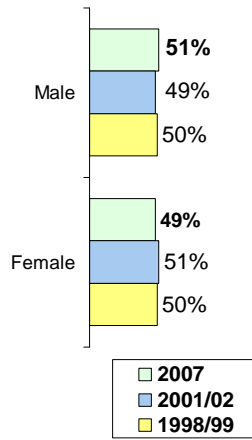


Visitor profile: Analysis of trends

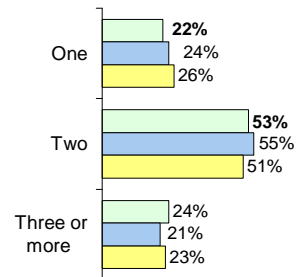
AGE



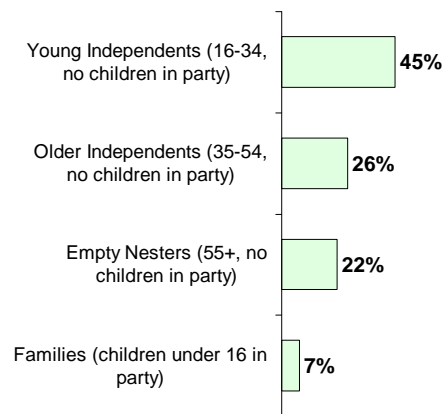
SEX



PARTY SIZE



LIFESTAGE (2007 only)

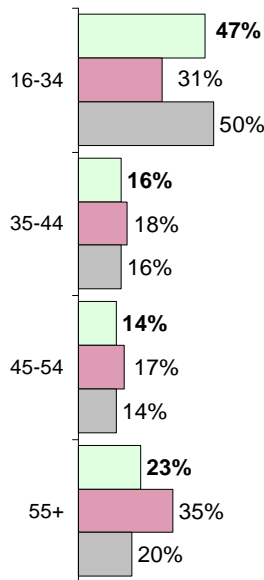


The age and sex profile of visitors to Edinburgh has remained fairly consistent since 1998 with almost half of visitors (47%) aged under 35 while smaller proportions were in the older age categories.

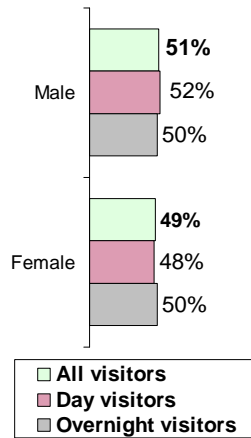
Reflecting this profile, over two in five visitors in 2007 were in the Young Independent lifestage (45%) while only 7% were travelling with children aged under 16.

Visitor profile: Variations by segment

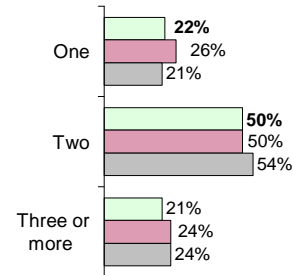
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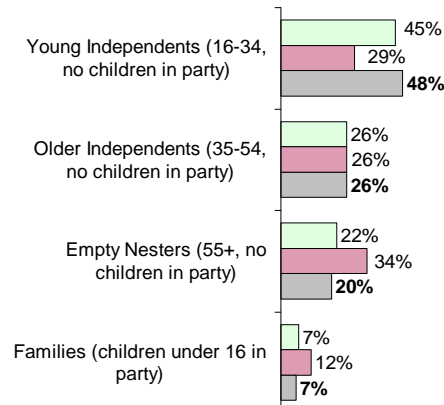
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PARTY SIZE



LIFESTAGE



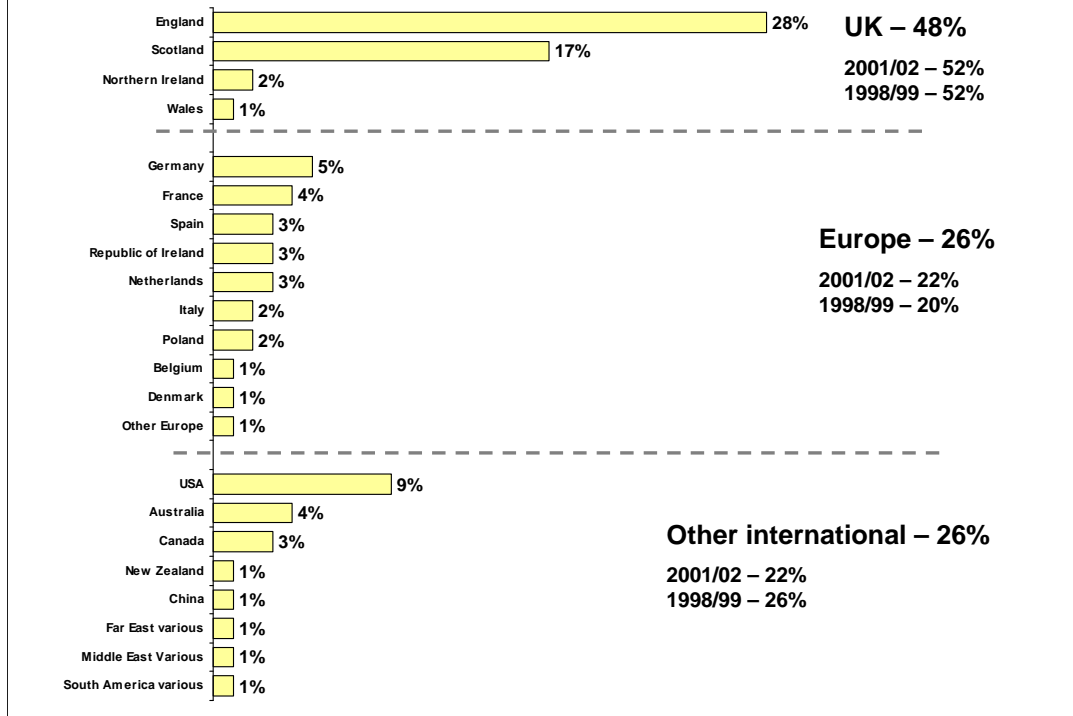
As the charts illustrate, there was a significant variation between the age profile of day and overnight visitors with half (50%) of those on an overnight trip aged under 35, compared to 31% of day visitors. Correspondingly, a larger proportion of day visitors were in the oldest age category with 35% aged 55 or over compared to 20% of overnight visitors.

Other variations between the day and overnight visitor markets included a larger proportion of day visitors visiting alone and more in the Empty Nester and Family life stages while more overnight visitors were in Young Independent life stage and in a party of two.

The profile of visitors also varied by place of origin as follows:

- UK residents – a larger proportion of visitors aged 35-54 (37%) or 55+ (29%). Correspondingly, more Empty Nesters (28%) and Families (9%).
- Europeans – a younger profile with 65% classified as Young Independents.
- Other International – a more varied profile with 48% in Young Independent life stage but 23% classified as Empty Nesters. Just 4% accompanied by children.

Place of origin: Analysis of trends

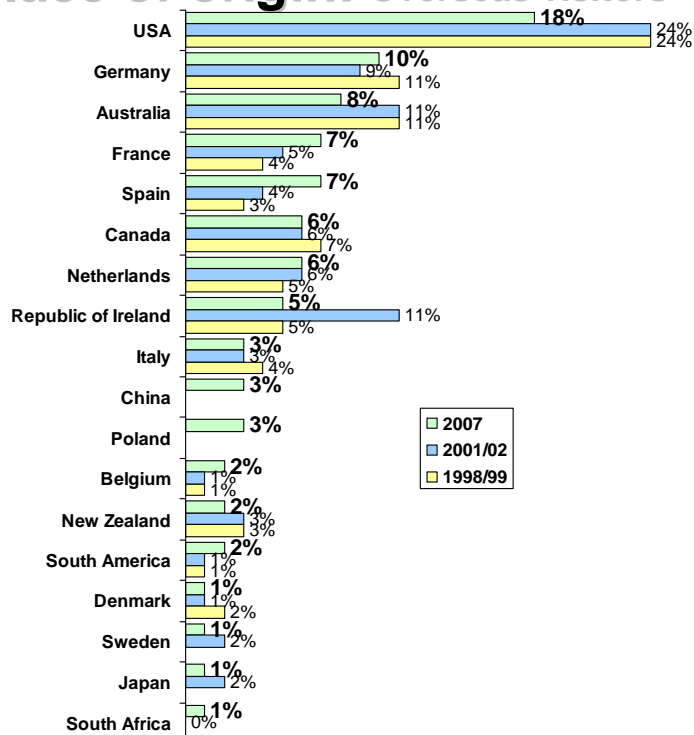


In 2007 around half of all visitors to Edinburgh lived in the UK (48%), 26% lived in Europe and 26% lived further afield.

At this overall level, the proportion of European visitors has increased from 20% in 1998/99 to 26% in 2007 while there has been a corresponding decrease in the proportion of domestic visitors.

These changes should be seen in the context of an overall growing market (see page 12), with the European market growing fastest.

Place of origin: overseas visitors



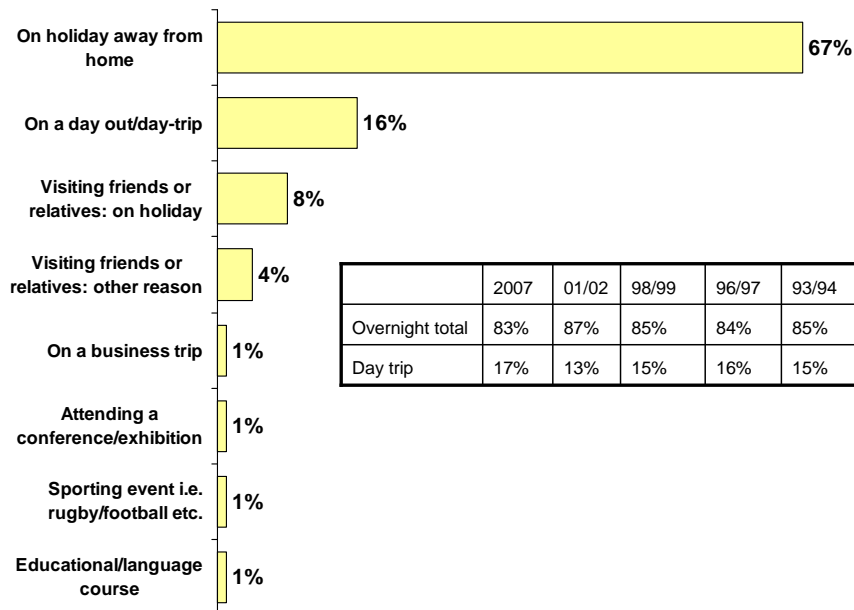
Focusing on the countries of origin of overseas visitors to Edinburgh, in 2007 the largest proportions of visitors lived in the USA (18%), Germany (10%), Australia (8%), France (7%) and Spain (7%).

Comparing these results with those obtained in previous surveys, suggests a decrease in the proportion of visitors from the USA but increase in the proportion of French, Spanish, Chinese and Polish visitors.

Main results – visit profile



Trip purpose



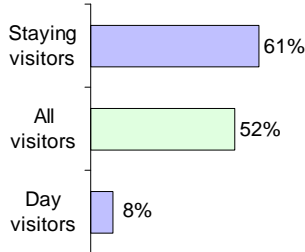
	2007	01/02	98/99	96/97	93/94	91/92
Overnight total	83%	87%	85%	84%	85%	83%
Day trip	17%	13%	15%	16%	15%	17%

As in previous years around two-thirds (67%) of visitors were on holiday away from home while 16% were on a day trip. Most other visitors were on an overnight visit for the purpose of visiting friends or relatives.

Previous visits to Edinburgh

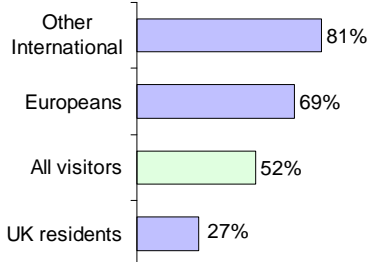
FIRST TIME VISITORS

By trip type...



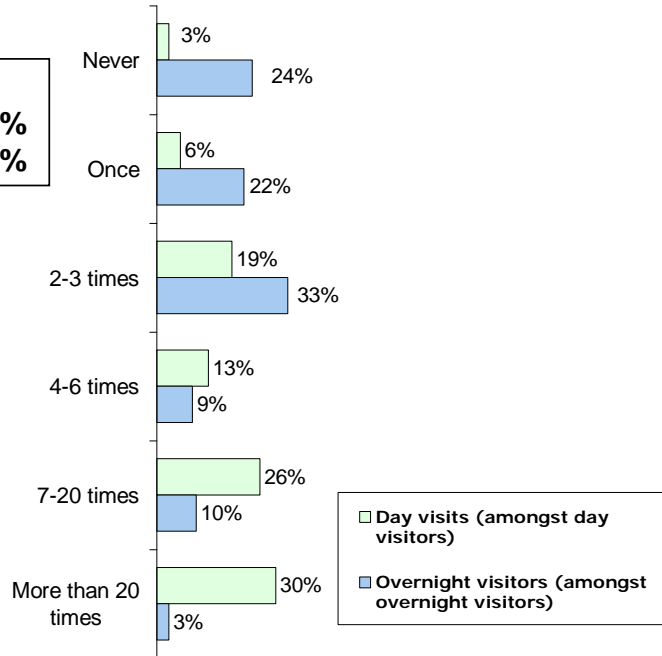
2007 – 52%
2001/02 – 47%
1998/99 – 44%

By origin...



PREVIOUS VISITS IN LAST 5 YEARS

(Base: All who have visited Edinburgh before)



Around half of all visitors were on their first ever visit to Edinburgh (52%). This is an increase from the proportions recorded during 1998/99 (44%) and 2001/02 (47%) – possibly a reflection of the young profile of visitors and growth of the international market.

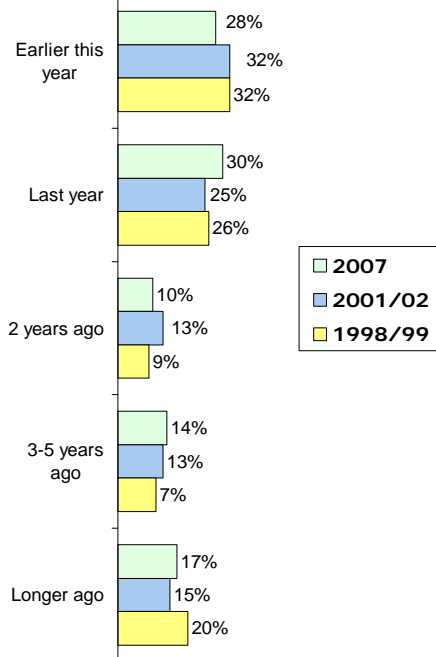
Most staying visitors (61%) were on their first visit to the city, with those from furthest afield most likely to state that this was the case.

Those visitors who had ever been to Edinburgh before were asked how often they had visited during the previous 5 years. Over half of day visitors (56%) had visited the city for this type of trip on at least 7 occasions while most staying visitors had not visited in the previous 5 years (24%) or had only visited once (22%).

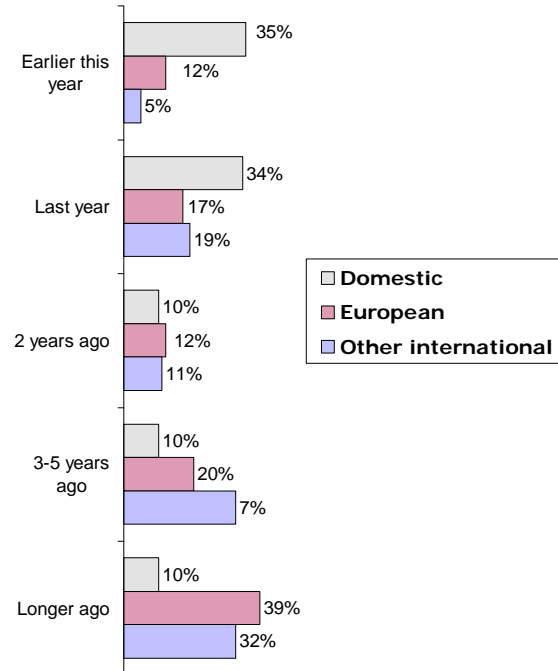
When last visited Edinburgh

(Base: All who have visited Edinburgh before)

TRENDS



VARIATIONS BY ORIGIN



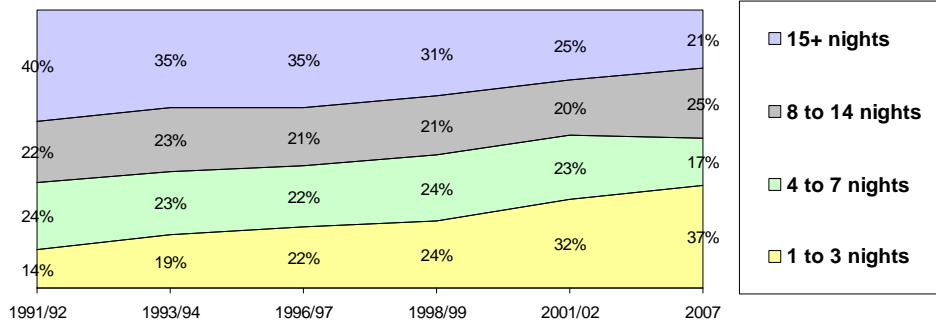
Visitors who had ever been to Edinburgh before were asked to state when they had last visited. As the chart above illustrates, 28% had visited earlier in 2007 while 30% had visited in 2006. These results are broadly similar to those obtained in previous surveys.

As would be expected day visitors were more likely than overnight visitors to have taken their last visit in 2006 or 2007 (86% compared to 44%).

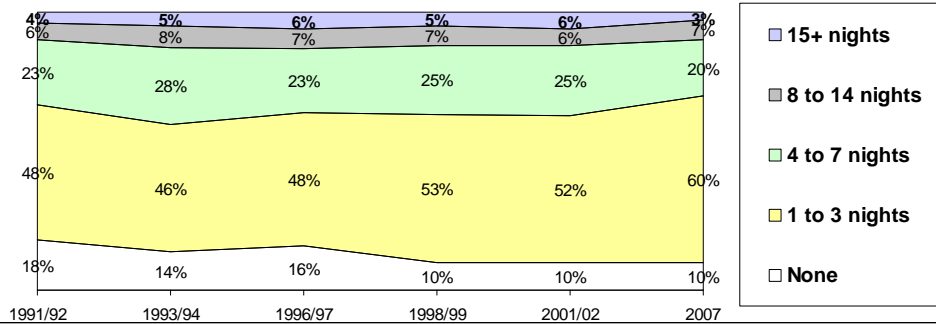
Correspondingly, as shown in the chart above, visitors who lived in the UK were much more likely than those who lived in other countries to have previously visited in 2006 or 2007.

Trip duration: Analysis of trends

TOTAL TRIP DURATION



NIGHTS IN EDINBURGH

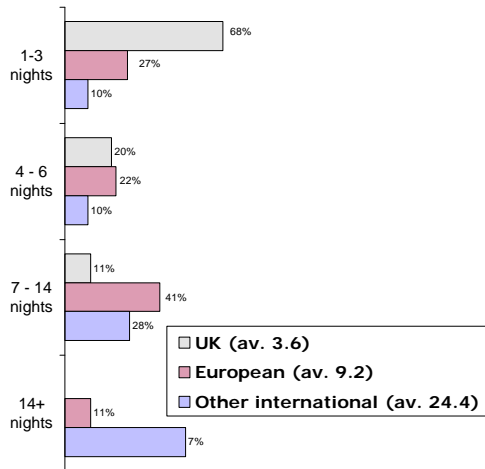


As the charts above illustrate, between 1991 and 2007, the proportion of visitors to Edinburgh spending between 1 and 3 nights *away from home* has increased from 14% to 37% while the proportions on a trip lasting more than 2 weeks has decreased from 40% to 21%. Reflecting this variation the average number of nights away from home has decreased from 16.8 nights in 1998/99 to 11.7 nights in 2007 (a decrease of 30%).

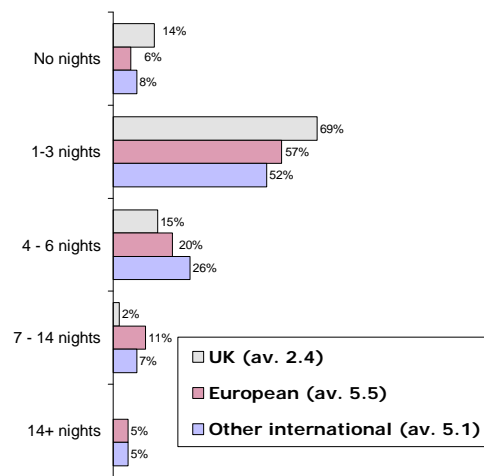
Since 1991 the proportion of tourists spending 1 to 3 nights *in Edinburgh* has also increased (from 48% to 60%) while the proportions staying no nights (i.e. on holiday but staying overnight in places outside of the city) or more than 8 nights decreased. This change is reflected by the decrease in the average number of nights spent in Edinburgh from 5.1 in 1998/99 to 4.2 in 2007 (a decrease of 18%).

Trip duration: Variations by segment

TOTAL TRIP DURATION



NIGHTS IN EDINBURGH



Proportion of total nights spent in Edinburgh

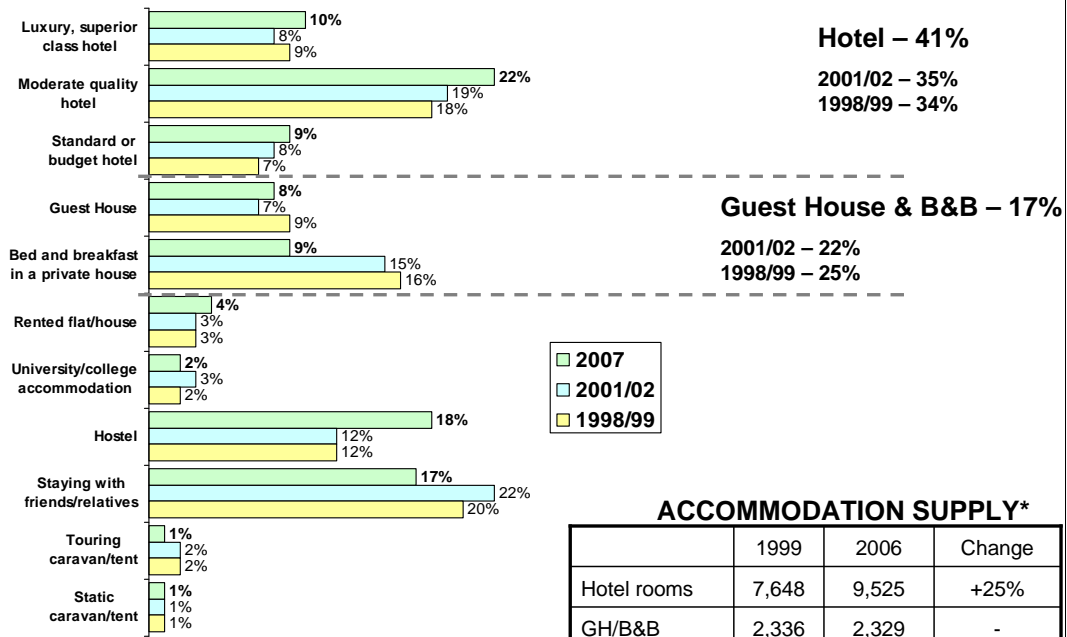
UK	67%
European	60%
Other international	21%

Comparing the duration of visits taken by visitors from different countries, the majority of UK residents (68%) stated that their overall trip duration was between 1 and 3 nights (an increase from 49% in 1998/99) while International visitors were more likely to be on longer duration trips.

Similarly UK residents were more likely to spend 1 to 3 nights in Edinburgh (69%) or to spend no nights in the city itself (14%).

In terms of the proportion of a total trip spent in Edinburgh, on average, UK residents and Europeans spent the majority of nights in the city, reflecting the city's status as a short/city break destination for these markets while visitors from further afield typically 'stopped off' in the city as part of a longer itinerary.

Accommodation used : Analysis of trends



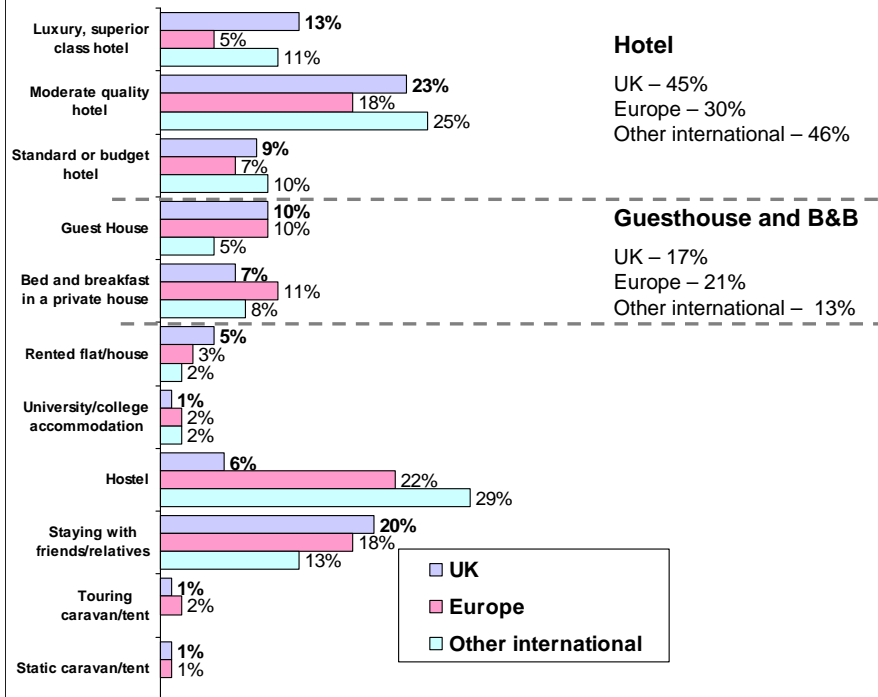
*Source: Edinburgh & Lothians Accommodation Audit, TRC 2006

During 2007 the most frequently used types of accommodation were hotels (41%), hostels (18%), the homes of friends or relatives (17%), bed and breakfast accommodation (9%) and guest houses (8%).

Between 1998 and 2007 the proportion of visitors staying in a hotel increased from 34% to 41% with the proportions staying in standard, budget and moderate quality hotels increasing most. The proportion of visitors staying in hostel accommodation also increased (from 12% of visitors to 18%) while the proportions using guesthouses and bed and breakfasts decreased (from 25% to 17%).

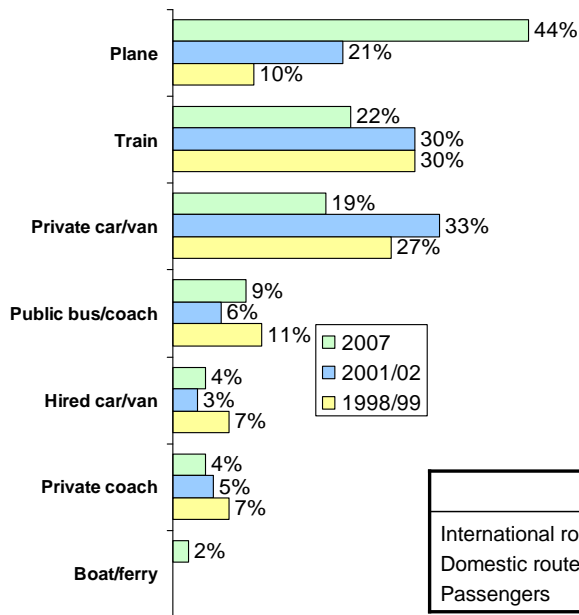
These variations reflect changes in the accommodation supply in Edinburgh over this period with an increased number of hotel rooms and hostel beds between 1999 and 2006 but no significant change in the number of guesthouse and bed and breakfast rooms.

Accommodation used: Variations by segment



In terms of the types of accommodation used by visitors from different countries of origin, UK residents were the most likely to stay with friends or relatives, Europeans were more likely than others to use bed and breakfast accommodation and other International visitors were the most likely to stay in a moderate quality hotel or a hostel.

Travel to Edinburgh: Analysis of trends



EDINBURGH AIRPORT

	1996	2007	Change
International routes	35	70	+100%
Domestic routes	24	25	+4%
Passengers	3.9m	8.8m	+26%

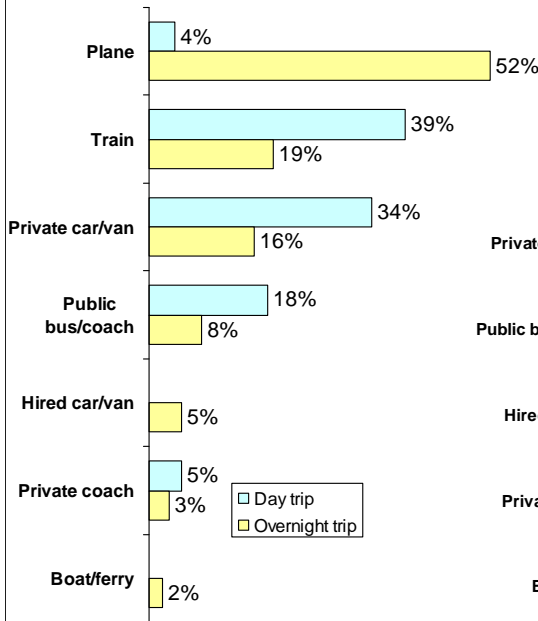
Sources: BAA, www.edinburgh.gov.uk

In 2007 the largest proportions of visitors travelled to Edinburgh by air (44%), train (22%) or private car (19%). The proportion of visitors travelling by plane has increased somewhat since 1998/99, a reflection of the increasing number of direct routes to Edinburgh Airport. As the table illustrates, the number of international routes has increased most, doubling between 1996 and 2007.

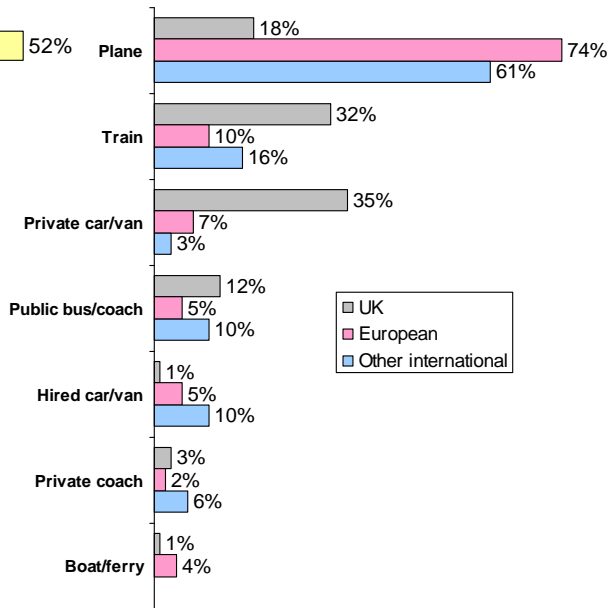
In interpreting these figures, the overall increase in the number of visits taken to Edinburgh should be borne in mind (see page 12). Much of this increase may have been driven by the increased number of visitors flying to Edinburgh while the numbers of visitors using other modes of transport have remained at more consistent levels.

Travel to Edinburgh: Variations by segment

BY TRIP TYPE:



BY ORIGIN:

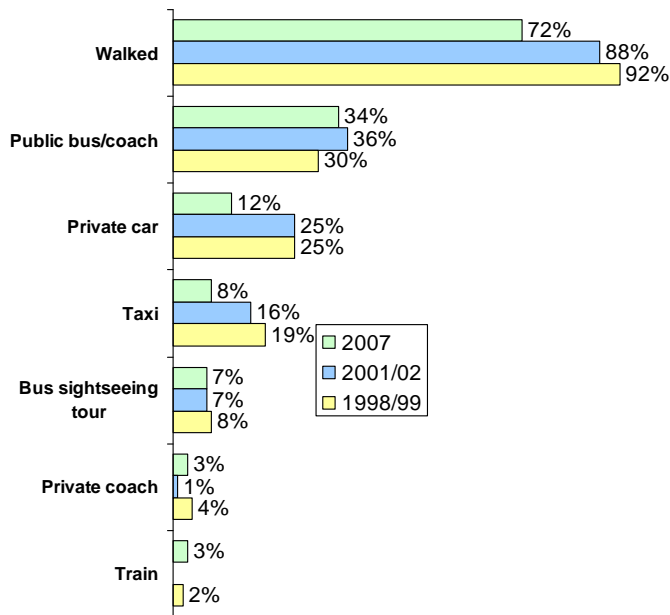


The types of transport used to travel to Edinburgh varied somewhat between different visitor markets.

In terms of trip type, the largest proportion of day trippers travelled by rail (39%, an increase from 29% in 1998/99) or private car (34%, a decrease from 47% in 1998/99) while half of overnight visitors travelled by plane (52%, an increase from 12% in 1998/99) and 19% travelled by rail (a decrease from 30% in 1998/99).

In terms of place of origin, UK residents were most likely to travel to the city by car or train while International visitors were the most likely to fly.

Travel within Edinburgh: Analysis of trends



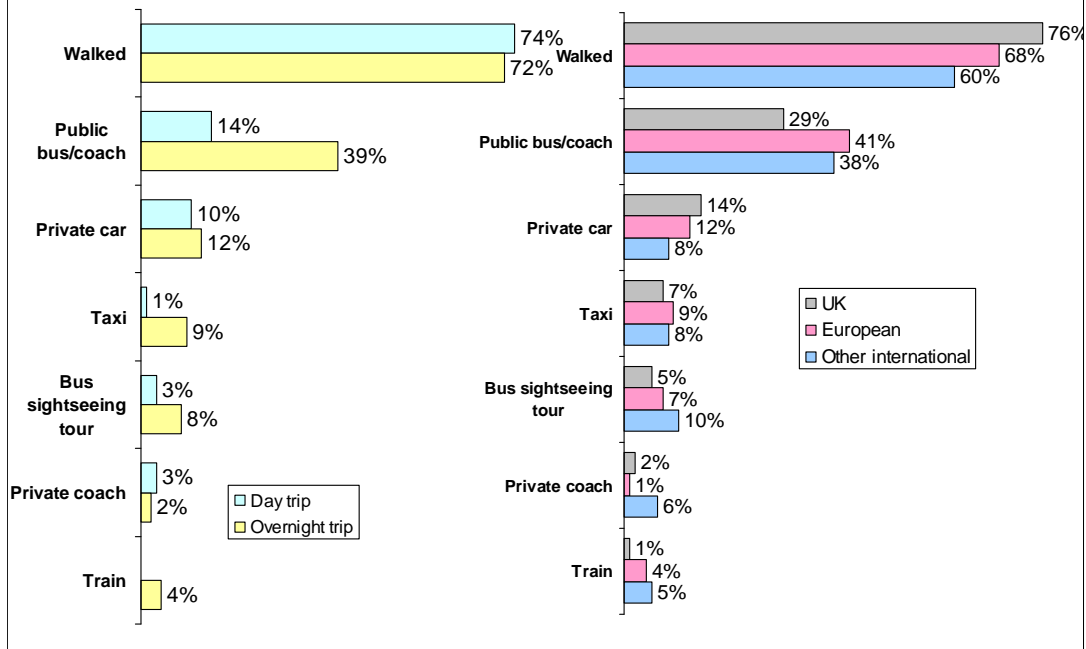
In 2007, as in previous years, the largest proportions of visitors stated that they travelled within Edinburgh on foot (72%) and/or on a public bus (34%).

While the proportions using public buses and bus sightseeing tours has remained at a fairly consistent level, in comparison to previous years, during 2007 smaller proportions of respondents reported walking or travelling by taxi.

Travel within Edinburgh: Variations by segment

BY TRIP TYPE:

BY ORIGIN:



The types of transport used to travel whilst in Edinburgh also varied between different visitor markets.

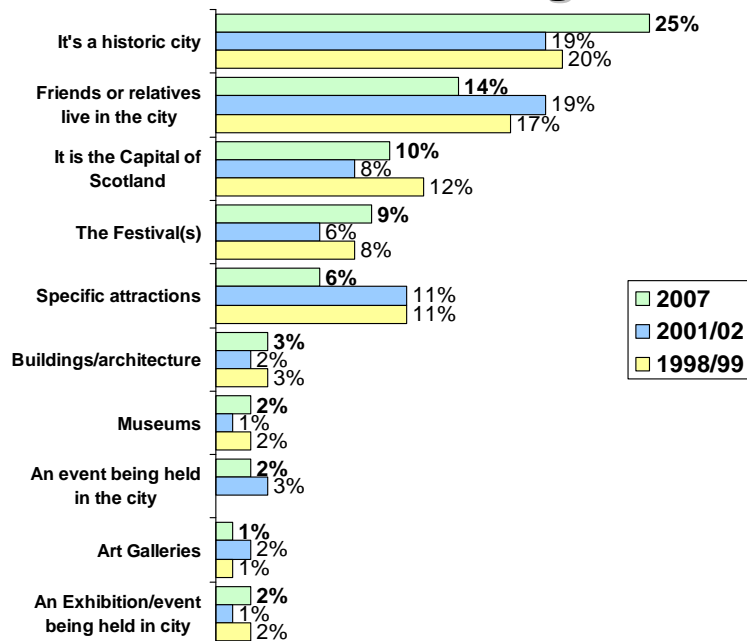
In terms of trip type, visitors on an overnight trip were more likely than those visiting for a day to use a variety of modes of transport including public buses (39%), taxis (9%) and bus tours (8%).

Variations by place of origin included a higher proportion of UK residents using a private car (14%) while overseas visitors were more likely to use a public bus (41% of Europeans, 38% of other International visitors).

Main results – motivations and influences



Main reason for visiting: Analysis of trends

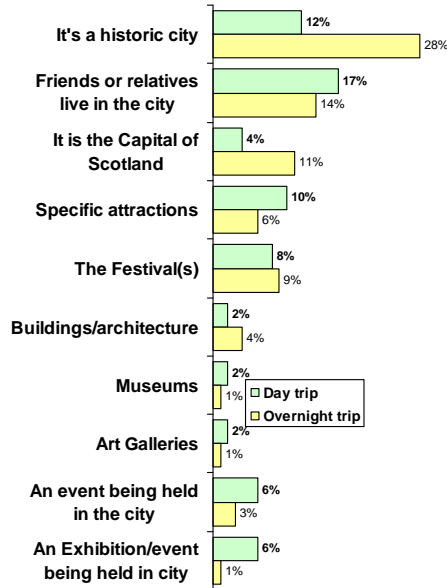


The chart above illustrates the single main reason for visiting amongst visitors to Edinburgh in 2007, 2001/02 and 1998/99.

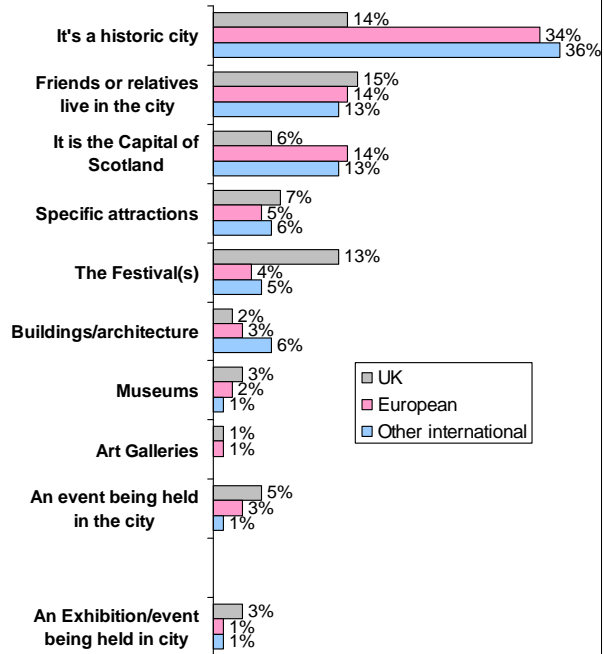
In comparison to previous years, during 2007, a larger proportion of visitors indicated that their main reason was related to Edinburgh being a historic city while smaller proportions provided responses relating to having friends or relatives in the city or wanting to visit specific attractions.

Main reason for visiting: Variations by segment

BY TRIP TYPE:

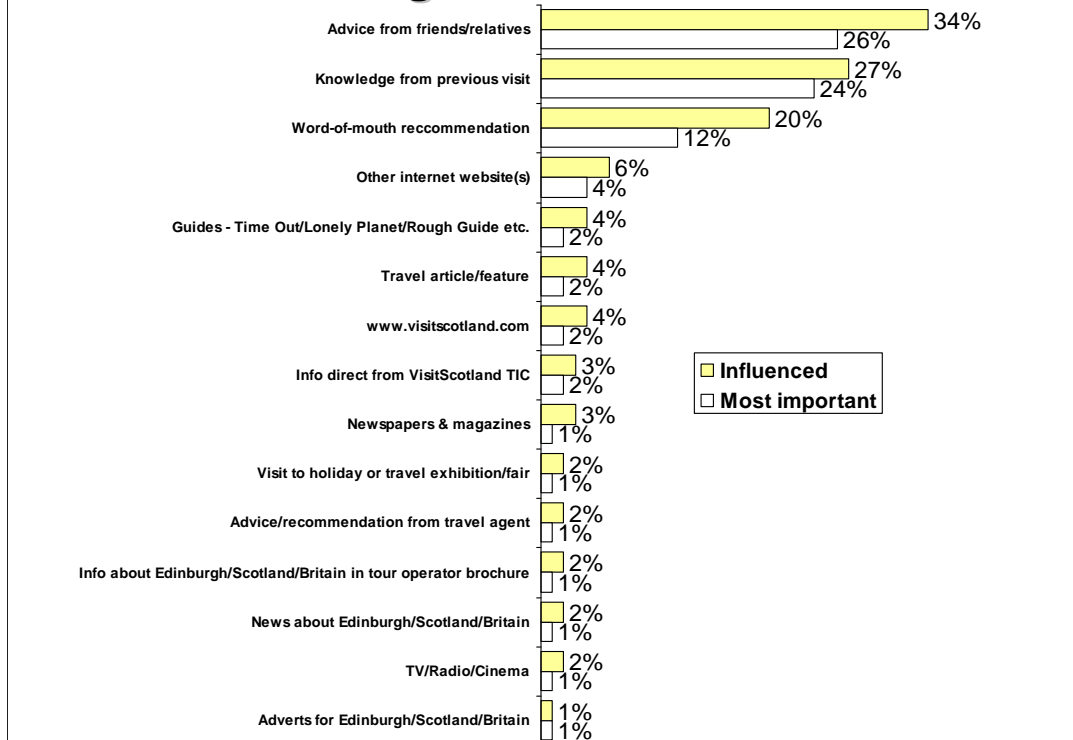


BY ORIGIN:



Comparing the responses provided by different groups of visitors, visitors on an overnight trip were more likely than day visitors to state that their main reason for visiting Edinburgh related to it being a historic city, the Capital of Scotland or because of the buildings and architecture while day visitors were more likely to visit because friends or relatives live in the city or to attend a specific event or exhibition.

Items influencing decision to visit



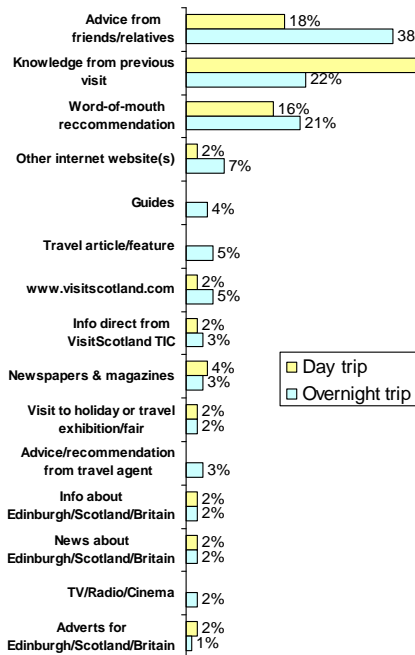
Overall, around a third of visitors to Edinburgh stated that they were influenced in their decision to visit by the advice of friends or relatives (34%) while a further 20% were influenced by other word of mouth recommendations. Around a quarter were influenced by their own previous experiences (27%). In terms of more formal sources of information, 4% of visitors were influenced by www.visitscotland.com while 6% were influenced by other websites.

Respondents were also asked to state which source of information was most important to them. As the chart illustrates, similar proportions indicated that the advice of friends and relatives (26%) or knowledge from previous visits (24%) were of most importance.

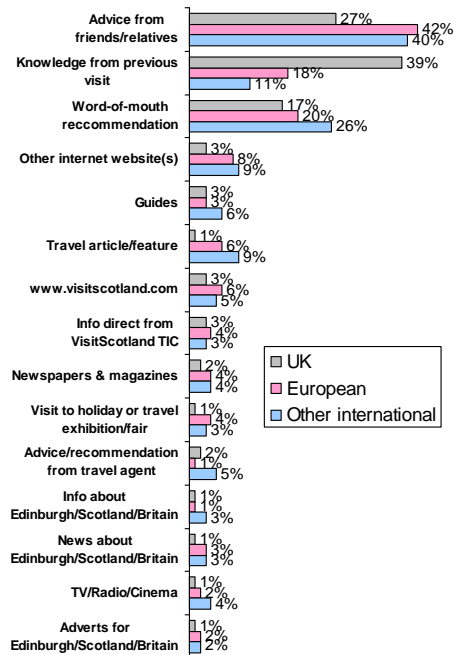
Comparing results with those obtained in previous years, reference to the Internet or specific websites as the most influential source of information increased from 1% in 1998/99 to 6% in 2007.

Influences: Variations by segment

BY TRIP TYPE:



BY ORIGIN:



Comparing the responses provided by different groups of visitors, visitors on an overnight trip were more likely than day visitors to be influenced by the advice of friends or relatives, other word of mouth recommendations or the more formal sources on information such as www.visitscotland.com.

In terms of place of origin, International visitors were the most likely to be influenced by advice or recommendations while UK visitors were more likely to be influenced by their own previous experiences.

What visitors are most impressed with

	All visitors	Day visitors	Overnight visitors
Architecture/buildings	41%	21%	46%
Castle	34%	20%	37%
Historic town/buildings	26%	18%	27%
Friendly/helpful people	22%	14%	23%
Everything in walking distance	19%	12%	20%
Beautiful/picturesque	16%	11%	16%
Royal Mile	15%	7%	16%
Atmosphere/ambience	13%	11%	14%
Everything/whole city	11%	14%	10%
Plenty to do/see	10%	12%	9%
Green spaces/gardens	10%	11%	10%
Clean streets	7%	6%	7%
Pubs	7%	2%	7%
Visitor attractions in general	7%	4%	8%
Shops quality of goods	5%	10%	4%
Restaurants	5%	7%	5%
Shops variety of goods	4%	6%	3%
Views	3%	2%	4%
Clean buildings/stone cleaning	3%	2%	3%
My/our accommodation	2%	3%	3%
Specific attractions	2%	6%	1%

Overall, the largest proportions of visitors were 'most' impressed with Edinburgh's architecture and buildings (41%), the castle (34%), the historic town and buildings (26%) and the friendly and helpful people they had encountered (22%).

Comparing responses to this question obtained amongst visitors on different types of trip, day trippers were more likely than overnight visitors to be impressed with the city as a whole, the variety of things to see and do, green spaces, shops and visitor attractions while overnight visitors were more likely to provide responses relating to the castle, the Royal Mile, other historic buildings and the friendly people.

Suggestions for improvements

	All visitors	Day visitors	Overnight visitors
Nothing/ Don't know	63%	57%	66%
Costs/ prices	5%	3%	6%
Weather	5%	2%	6%
Car parking	5%	14%	3%
Litter/more bins	3%	4%	2%
Public transport	3%	2%	3%
Road works/congestion	3%	5%	2%
Signposting	2%	2%	2%
Clean up buildings/restore	1%	2%	1%
Cheaper eating places	1%	1%	1%
Longer restaurant opening hours	1%	1%	2%
More/improve info. centres	1%	2%	1%
More green areas/flowers	1%	1%	<1%
More public toilets	1%	2%	1%
Smoking ban – any mention	1%	2%	1%
Drunks/beggars	1%	2%	1%
More accommodation needed	1%	-	1%
Improve festival ticket system	1%	2%	1%
Longer shop opening hours	1%	-	1%

When asked what, if anything, could be improved in Edinburgh, it is notable that 63% respondents either said nothing or that they did not know. This is a slightly higher proportion than recorded in both the 1998/99 and 2001/02 surveys (59% and 58% respectively).

The most frequently provided suggestions for improvements related to costs, prices and value for money (5%), the weather (5%), litter (3%) and issues relating to car parking (5%), public transport (3%) and traffic congestion (3%).

In comparison to the 2001/02 survey, the proportion of respondents mentioning costs, prices or value for money increased marginally (from 3% to 5%). This aspect was particularly likely to be seen as an issue amongst overnight visitors from Europe (8%) with the increased strength of the pound against other currencies impacting upon perceptions of cost and value for money.

TRI*M Analysis



TRI*M Index is based on 4 key questions:

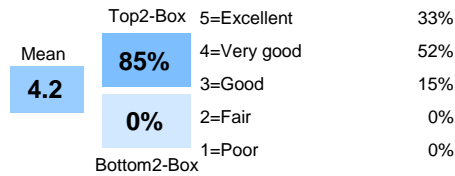
- *OVERALL PERFORMANCE: How would you rate Edinburgh overall?*
- *RECOMMENDATION: Based on your experience, would you recommend visiting Edinburgh to friends or family?*
- *REVISIT: Based on your experiences would you visit Edinburgh again?*
- *COMPETITIVE ADVANTAGE: Given what you know about other destinations, how would you rate Edinburgh compared to other destinations?*

The first stage of the TRI*M analysis is the calculation of the TRI*M Index, an overall measurement of the strength of customer relationship. Each respondent is assigned a TRI*M Index allowing an analysis at an overall 'all visitor' level and for specific sub groups of visitors.

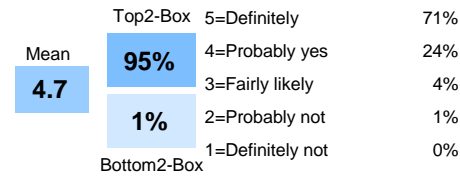
The TRI*M Index is calculated on the basis of responses to these 4 questions.

Responses to the key questions:

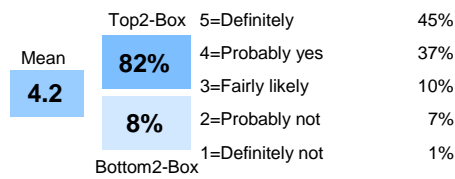
1. Overall Performance



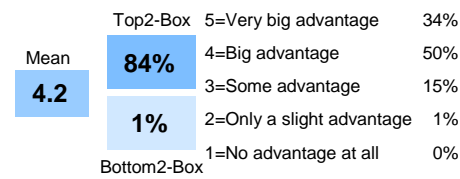
2. Recommendation



3. Revisit



4. Competitive advantage



Base 738

For each of the four questions, 5 possible responses could be provided ranging from very positive to very negative.

At an overall level Edinburgh received very positive responses to all of the questions.



Reflecting the positive responses obtained to the 4 questions, an overall TRI*M Index of 97 was obtained for Edinburgh. This Index is higher than that obtained in many other tourist destinations where TRI*M analysis has been undertaken and an Index in the low 90s is more typical.

High Indices were obtained across all of the different visitor segments listed above. The highest Indices were obtained amongst international visitors from further afield than Europe and Young Independents while marginally lower scores were obtained amongst Europeans and Families.

The high overall Index of 97 obtained for Edinburgh is particularly impressive given the high proportion of overseas visitors within the Edinburgh market, a group who are generally less likely to revisit frequently. The high score is largely driven by the very high levels of satisfaction – as measured by the visitor’s propensity to recommend Edinburgh to others.

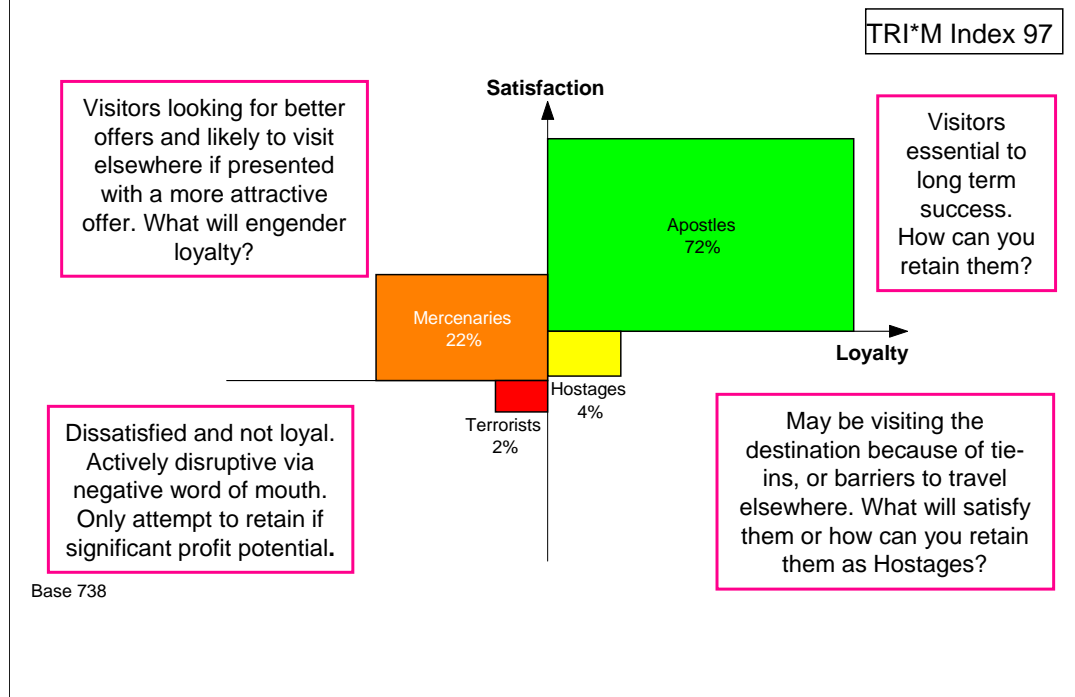
TRI*M Typology: Satisfied or loyal visitors?

MEASURE	INSIGHT	TYOLOGY DIMENSION
Overall performance	Performance evaluation	“Satisfaction”
Recommendation	Visitor satisfaction	
Revisit	Relationship strength	“Loyalty”
Competitive advantage	Visitor retention intensity	

The next stage of the TRI*M analysis is the TRI*M Typology in which all respondents are allocated into one of four groups on the basis of their levels of satisfaction (based on responses to performance and recommendation questions) and levels of loyalty (based on responses to revisit and competitive advantage questions).

The TRI*M Typology is particularly relevant to destination marketing given the importance of personal recommendations through word or mouth communications or through on-line media such as Trip Advisor.

TRI*M Typology: All visitors

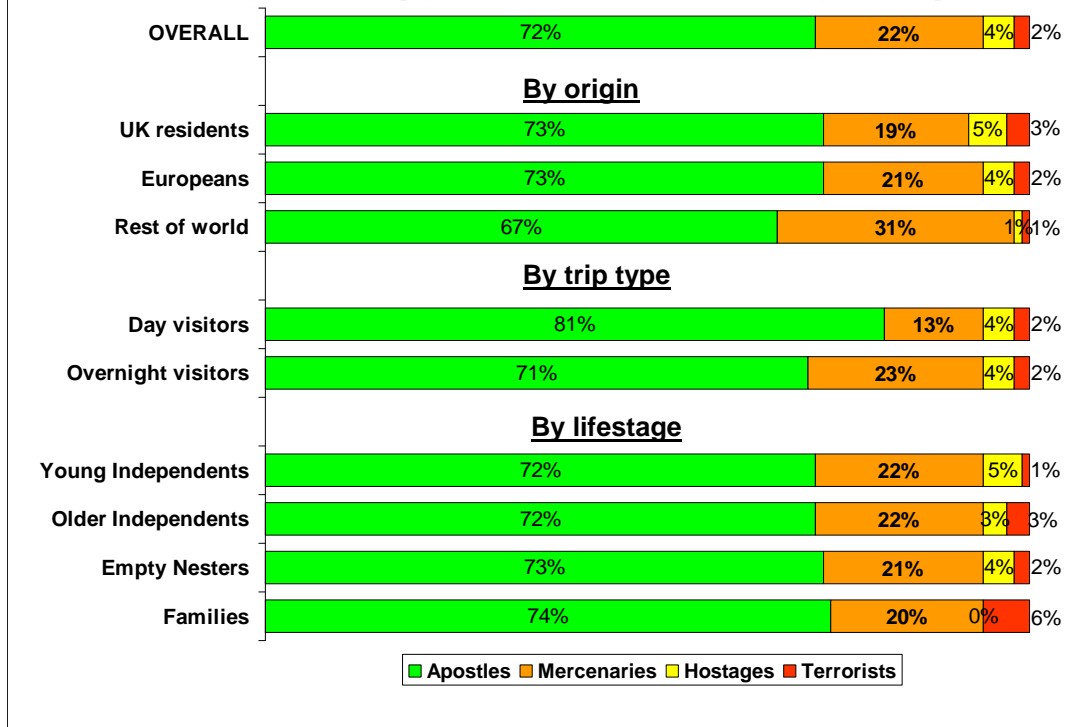


Reflecting the high TRI*M Index, the majority of visitors were in the 'satisfied' typologies, with 72% classified as Apostles (both loyal and satisfied) and 22% classified as Mercenaries (satisfied but less loyal).

Other research has suggested that a visitor to a destination who has a bad experience will tell 10 people about this experience while those who have a good experience will only tell 3 people. With the increased use of on-line sites such as Trip Advisor and Facebook, the numbers of people who may be informed of good or bad experiences may be much higher.

However the ratio Terrorists to Apostles within the Edinburgh visitor market is extremely positive and suggests that the market will continue to benefit from largely positive word of mouth promotion and regular repeat visits. These findings correspond to those regarding the paramount importance of personal recommendations and previous experiences in decisions to visit Edinburgh (page 33).

TRI*M Typology – Variations by segment



Comparing the Typology profiles of various groups within the overall market, International visitors from outside of Europe were more likely to be classified as Mercenaries (satisfied but less loyal) – a reflection of their high satisfaction levels but lower likelihood to revisit. Slightly higher proportions of UK residents were classified as either Hostages (loyal but not as satisfied) or Terrorists (neither loyal not satisfied).

In terms of trip type – day visitors were the most likely to be classified as Apostles while more overnight visitors were Mercenaries (again reflecting the lower revisit 'score' amongst longer haul International visitors). The main lifestage variation was a higher proportion of Terrorists amongst families – visitors who were less satisfied and less loyal than those without children.

TRI*M Grid

- 22 attributes of Edinburgh tourism 'product' asked about:

Rated in terms of importance ('Stated Importance')

We would like to understand how important various things are to you when you are thinking about a holiday or short break/day visit destination.

We are going to use a 5 point scale:

Extremely Important (Score of 5)

Very Important (4)

Fairly Important (3)

Not Very Important (2)

Not at All Important (1)

Rated in terms of Edinburgh's performance

Now I'd like you to think about Edinburgh as a place to visit . How would you rate Edinburgh on each of the following factors?

Excellent (Score of 5)

Very Good (4)

Good (3)

Fair (2)

Poor (1)

The third stage of the TRI*M analysis is the production of the TRI*M Grid, an analysis of the aspects of the drivers of quality and customer retention. This analysis is based upon responses to questions regarding the importance of various aspects of the tourism product (stated importance) and their performance.

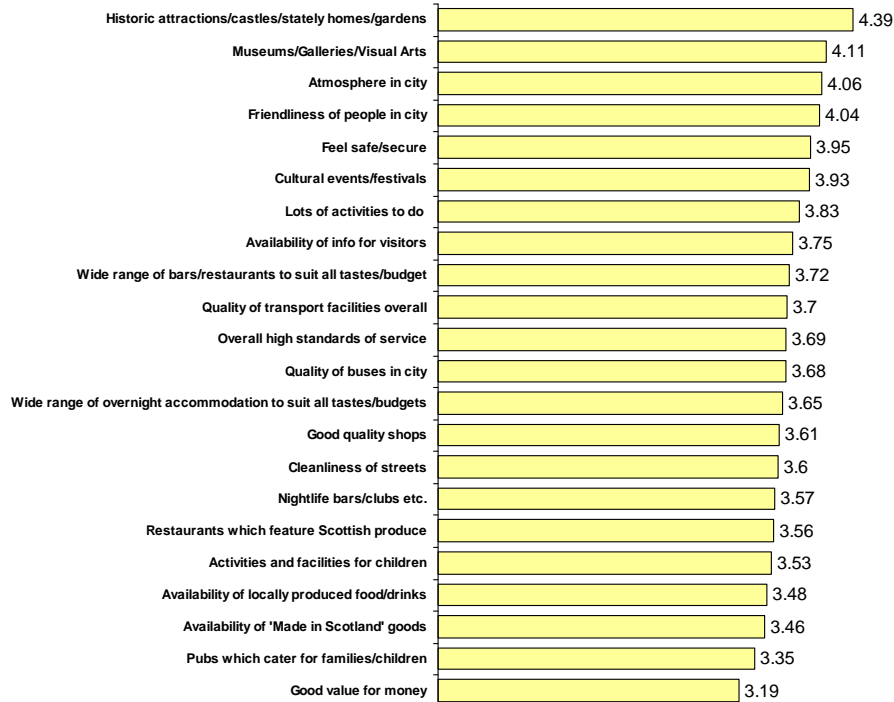
Stated Importance: Summary of mean scores



As the chart illustrates, feeling safe was rated as most important when choosing a destination (av. score of 4.36) while the presence of historic attractions (4.22), the atmosphere in the city (4.19) and friendliness of people (4.19) were also rated as important by most visitors. In contrast the lowest importance scores were obtained for the availability of 'Made in Scotland' goods (3.11) and the nightlife (2.76).

It should be noted that the scores are an average across all visitors. Some of those rated as less important overall may be more important to certain groups of visitors (for example nightlife).

Performance: Summary of mean scores

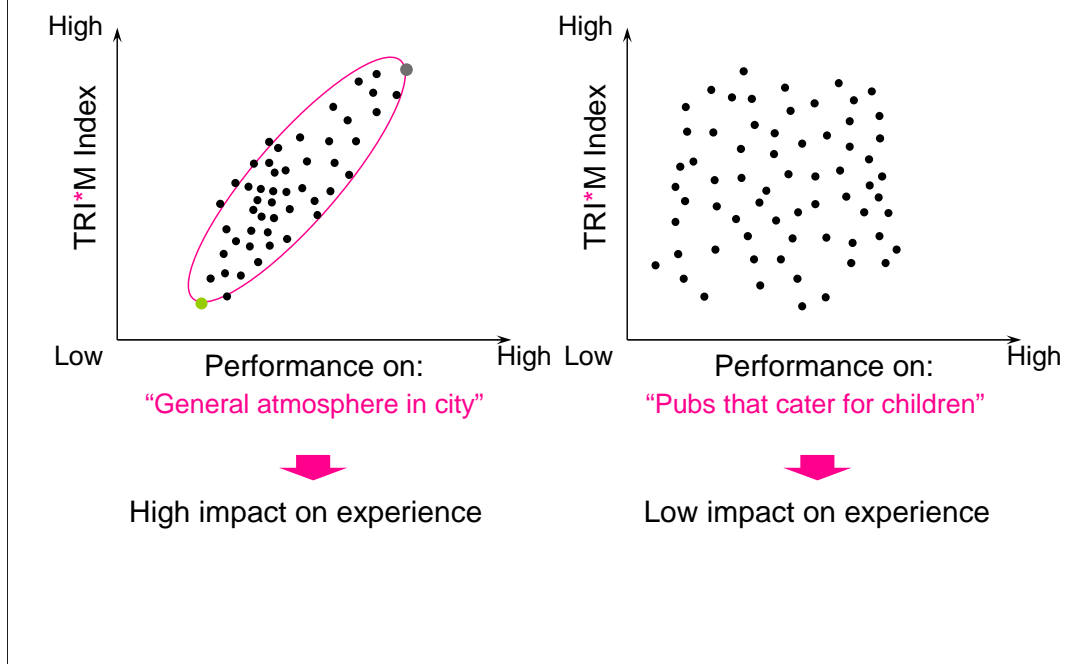


At an overall, all visitors level, the aspects rated as performing best in Edinburgh were the city's historic attractions (4.39), museums and galleries (4.11), the atmosphere (4.06) and the friendly people (4.04). The aspect 'good value for money' received the lowest performance score overall.

Comparing the order of the performance ratings with that of the importance ratings on the previous page, a number of variations are notable. For example while 'good value for money' is the 7th most important aspect overall, it received the lowest performance score. Similarly 'pubs which cater for families/children' is the 11th most important aspect but rated as performing worse than most other aspects.

The TRI*M Grid analysis provides a full analysis of the stated importance and performance of each aspect and also takes into account the *real* impact of each aspect on the overall experience, as discussed on the next page.

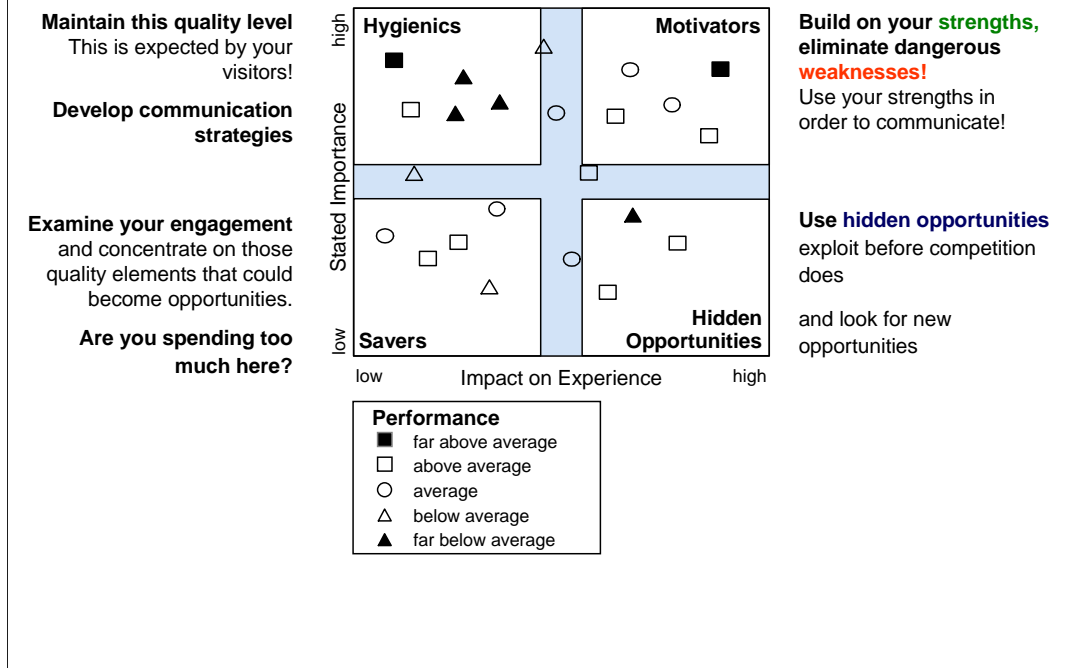
Impact on experience



The TRI*M Grid applies the responses to the questions regarding importance and performance together with a statistically derived measurement, 'impact on experience'.

This measurement is statistically derived from an analysis of the correlation of each aspect's level of performance with the TRI*M Index. If there is a positive correlation between the TRI*M Index and the performance of a particular aspect it is rated as having a high impact on quality of experience.

TRI*M Grid: Interpretation



Each of the 22 attributes have then been given relative values in terms of these three dimensions:

Levels of stated importance – an indication of the aspects that visitors believe to be most important in their decision to visit. **In the TRI*M grid this score is displayed on the vertical axis - the closer an attribute is to the top of the grid, the higher the stated importance.**

Impact on experience – this measurement is statistically derived from an analysis of the correlation of each aspect's level of performance with the TRI*M Index. If there is a positive correlation between the TRI*M Index and the performance of a particular aspect it is rated as having a high impact on quality of experience. **This measurement is displayed on the horizontal axis - the further to the right of the grid, the higher the impact on the quality of experience. In other words, it is possible to prioritise the attributes in terms of their real impact on the visitor experience.**

Levels of performance – this measurement provides an indication of the relative performance of each of the aspects which were rated. **The performance score respondents gave to each aspect is displayed by the shape plotted on the grid.**

By combining these dimensions, the TRI*M Grid provides an insight into which aspects of the Edinburgh tourism product should be priorities for the tourism industry, in terms of product development and marketing communications. To help identify appropriate actions for the attributes which were evaluated, each of the four quadrants has been given a name indicating its relative priority.

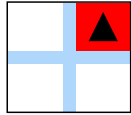
The top priorities should be those that fall into the **Motivators quadrant** (top right hand corner of the grid) because these have a high impact on experience *and* high stated importance.

Second priority should be any aspects in the **Hidden Opportunities quadrant** (bottom right hand corner) because these also have a high impact on experience.

Third priority is aspects in the **Hygienics quadrant** (top left hand corner) which have high levels of stated importance but have less impact on the quality of experience.

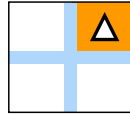
TRIM Grid: Prioritisation

1. Top Priority



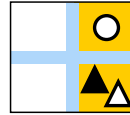
Filled triangles in the Motivator quadrant

2. High Priority

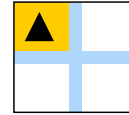


Unfilled triangles and circles in the Motivator quadrant

3. Medium Priority



Triangles in the Hidden Opportunities and circles in the Motivator quadrants



To be observed: Triangles in the Hygienics quadrant



... and never forget to maintain strengths



TRI*M Grid: All visitors

Strengths

- A11 General atmosphere in the city
- A17 Historic attractions, castles, stately homes and gardens
- A12 Friendliness of the people in the city
- A10 Feeling of safety and security
- A16 Museums, Galleries and visual arts

Weaknesses

- A13 Lots of activities to do
- A18 Overall high standards of service
- A07 A wide range of overnight accommodation to choose from to suit all tastes and budgets

Hidden Opportunities

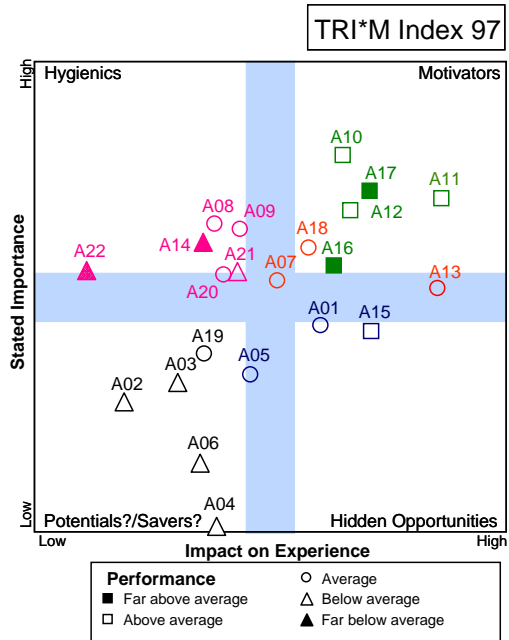
- A15 Cultural events/festivals
- A01 A wide range of bars and restaurants to suit all tastes
- A05 Good quality shops

Hygienics

- A09 Cleanliness of streets
- A21 Activities and facilities for children
- A20 Quality of transport facilities overall
- A08 Availability of information for visitors
- A14 Good value for money
- A22 Pubs which cater for families and children

Savers

- A19 Quality of buses in city
- A03 Availability of locally produced food and drink
- A04 Nightlife - bars, clubs, etc
- A06 Availability of "Made in Scotland" goods
- A02 Restaurants which feature Scottish produce



TRI*M Grid: Summary of key findings

- **Strengths** – general atmosphere, historic attractions and buildings, the friendly people, the feeling of safety and the museums and galleries. These aspects drive visitors to recommend and revisit Edinburgh and should be maintained and communicated.
- **Top Priorities** – provision of lots of activities to do, standards of service and the range of overnight accommodation available. Improving the quality of these elements will have a positive impact on the overall quality of visitor experiences.
- **Hygienics** – cleanliness of streets, activities and facilities for children, quality of transport facilities, availability of information, good value for money, pubs that cater for families and children. These aspects are rated as important by visitors but actually have less impact on their overall quality of experience. As they are perceived as important, it is still important that those which are underperforming (i.e. triangles and circles) should be improved.
- **Hidden Opportunities** – cultural events/festivals, a wide range of bars and restaurants, good quality shops. Although they are generally rated as less important by visitors, these attributes have been found to have direct correlation to the overall quality of visitor experience. Performing well in these areas can provide Edinburgh with a competitive advantage over other destinations.

TRI*M Grid: Variations by trip type

	Day visitors	Staying visitors
Strengths – <u>maintain and communicate</u>	Museums & galleries, cultural events/festivals, feeling of safety & security, general atmosphere.	Museum & galleries, feeling of safety & security, general atmosphere, historic attractions.
Top Priorities - <u>improve</u>	Information for visitors, activities, value for money, pubs which cater for families.	Activities to do, standards of service, cleanliness of streets, a wide range of accommodation.
Hygienics – <u>second priority improvements</u>	Standards of service, cleanliness of streets, activities and facilities for children, quality of transport facilities.	Information for visitors, value for money, quality of transport facilities, pubs that cater for children, activities and facilities for children.

TRI*M Grid: Variations by origin

	UK	Europe	Other international
Strengths – <u>maintain and communicate</u>	General atmosphere, friendliness of people, historic attractions, museums & galleries, safety & security.	General atmosphere, friendliness of people, historic attractions, safety & security, activities to do.	General atmosphere, friendliness of people, historic attractions, safety & security, activities to do.
Top Priorities - <u>improve</u>	Things to do, range of bars & restaurants, standards of service	Cleanliness of streets, standards of service, range of accommodation, pubs which cater for families.	Cleanliness of streets, standards of service, range of accommodation, range of bars & restaurants.
Hygienics – <u>second priority improvements</u>	Value for money, cleanliness of streets, range of accommodation, activities & facilities for children, pubs which cater for families.	Information for visitors, value for money, quality of transport facilities.	Information for visitors, value for money, quality of transport facilities, activities & facilities for children.

Appendix



Method - Interviews achieved

- 49 days of interviewing between Jan 27th 2007 – Jan 4th 2008
- 738 achieved interviews in total
- Average of 15 interviews achieved per shift

	Days	Interviews
Halfway up Royal Mile	10	157
Edinburgh Castle Esplanade	7	136
TIC/ Waverley Steps	6	102
Bottom of the Mound/ The Galleries	8	94
West End/ Princes Street (incl. Gardens)	3	42
Edinburgh Waverley Station	2	34
Britannia/ Ocean Terminal	2	29
St. Andrews Square Bus Station	2	27
Christmas Market/ Princes Street	3	24
Royal Museum of Scotland	1	20
Our Dynamic Earth/ Palace of Holyrood	1	20
Charlotte Square (Book Festival)	1	20
Royal Botanic Gardens	1	12
Edinburgh Zoo	1	11
George Street (Assembly Rooms)	1	10
Total	49	738