SUMMARY NOTE OF FIRST MEETING OF EDINBURGH TOURISM STRATEGY 2030 DEVELOPMENT - 'CRITICAL FRIENDS' REVIEW PANEL (3 JUNE 2019)

1. CONTEXT OF CRITICAL REVIEW PANEL

In developing the new Edinburgh Tourism Strategy 2030, and in order to bring a wider range of views, a "critical friends" review panel of experts from out with Scotland has been established.

On the panel we have representatives from academia, industry bodies and destination leaders from London, Florida, Berlin, Barcelona and Amsterdam. The on-line review panel meetings are hosted by Margaret McNeil and Gillian Richardson of ETAG and facilitated by Kenneth Wardrop.

As well as learning from best practise in comparator and competitor destinations the purpose of the review panel is to:
- Challenge ideas and apply critical analysis
- Introduce new insights and perspectives on trends, challenges and opportunities from individuals who have an external view of the destination
- Provide different ideas on ways of taking the destinations strategic direction forward
- Help shape thinking on strategy delivery structures, vehicles and organisational and collaborative formats for Edinburgh stakeholders to maintain competitive advantage
- Explore what the impact of the evolving strategy might be on different stakeholder groups and the shaping of visitor experiences.

The panel is conducted in an 'in-confidence' and non-attributable basis to ensure candid feedback on the strategy from panel participants. The panel is scheduled to convene via on-line video conferencing on three occasions at critical points in the drafting of the new strategy. Future engagement with the panel will take place in September and November 2019.

The insights and perspectives garnered from this panel of international experts will complement the other stakeholder engagement activities being undertaken as part of the strategy development process. The first meeting of the review panel took place on the 3 June 2019 and below is a summary of some of the key observations and insights from panel members.

2. KEY OBSERVATIONS FROM THE CRITICAL FRIENDS PANEL

a) Strategy formulation approach being adopted
➢ agreed that areas of discussion in the local industry and stakeholder consultation process are the right areas of focus
➢ consensus that Toposophy's evidence review and analysis report is thorough and sound
➢ good to see key themes such as: well-being tourism, retail, food & drink tourism, & capacity management, 'good growth'/'creating shred value' covered

- experiences are going to remain an important driver of tourism across markets going forward -need to think about how to create the environment to encourage unique visitor experiences
  - importance of the English market for Edinburgh (& Scotland) –a need to put effort in to nurturing this market

b) *Capacity Management*
  - Edinburgh's challenge is to manage visitor capacity at peaks not a general 'overtourism' issue
  - 'Localness' (*'Renaissance Neighbourhoods'*) key trend, need to achieve balance to minimise visitor/resident tensions - communication is vital
  - many residents do not see the value of tourism only perceived negative impacts on daily lives, strategy needs to articulate why tourism is important in broadest economic, social and cultural context – role for tourism industry to communicate the benefits of tourism
  - mapping of appropriate neighbourhoods will help visitor dispersal -signage and Apps investment supported by promotion (social media) can direct visitor flows – the way cities manage and use their public spaces is critical for encouraging wider visitor exploration / dispersal beyond city centre; a role for local events / also recognise that not just Air BnB accommodation in local neighbourhoods but often also hotels
  - co-create with residents to find mutually beneficial solutions - *'quality of life'* for residents more important than tourism (challenges in communicating with local citizens)
  - perceived impacts of Air BnB and 'overtourism' on residential rental prices can become a scapegoat (critical to have the right data on tourism impacts to inform such discussions)

c) *Destination Leadership & Management*
  - at a time of public spending constraints / reducing resources - perceived issues of capacity to proactively manage growth in the visitor economy & advancing this tourism strategy
  - with backdrop of growing city economy & infrastructure pressures need to fully integrate tourism strategy with wider economic, social and cultural objectives and wider city strategies i.e. City Centre Transformation Strategy – role for tourism strategy to influence Economic Strategy in areas such as employment/ skills, transport, planning & housing
  - tourism industry too often focused on growth (extracting value) & not enough on *'creating shared value'* - consider how tourism investment helps realise wider urban agendas & can strengthen other sectors
  - Toposophy report highlights the inequalities in Edinburgh (social exclusion)- which is an important challenge to be addressed in the strategy – the tourism industry has to take on some of the responsibility for addressing these challenges
  - concept of 'good hosts'; locals comfortable with / welcoming of visitors -a manifestation of 'good growth', indicative of resolving potential tensions/ antagonisms
  - appears Edinburgh has little choice in introducing TVL ('Tourism Tax'); how it is managed and communication about this to locals and visitors is critical
  - who is *'the voice of Edinburgh on tourism matters'*? a key question for Destination Leadership if there is a crisis who is responsible for key messaging about the destination?
  - Edinburgh needs to clarify what is the ambition of the city as a destination? If you want to continue to grow – what is valuable from this for local residents?

d) Marketing & Promotion

- critical in taking forward the new Tourism Strategy will be marketing capacity & infrastructure
- important not to split the destination management from marketing – destination narrative must reflect reality
- what does Edinburgh want to be known for / represented as in 2030 – is it content to continue to be known as 'The Festival City' or additional narratives
- strategy should address meaning of the 'Edinburgh Experience'? - best focus on quality over quantity and recognition that destination can make active choices (e.g. a focus on messages relating to high quality visitor experiences, cultural engagement, as a centre for thought / 'new enlightenment')
- need to emphasise Edinburgh's shop window and gateway role for Scotland
- key task to manage 3 dimensions – generating more value / greater volume of visitors & richness/depth of the visitor experience
- last minute booking a major trend and consumer desires for enriching and meaningful experiences makes it important for destinations to be curating experiences real time – responding to must do/ must visit/ must do now. Also recognise choice/ range of destination options open to consumers
- visitors are no longer passive – they are looking for experiences and memories – deeper/ richer/ engaged/ more experiential tourism – more active storytelling and engagement

e) Enabling destination infrastructure

- Destinations sharing common challenges going securing staff / skills to support delivery of experiences.
- destination needs to work hard on upskilling workforce (enhance local resident earnings in tourism industry) – local employment tourism industry key part of 'creating shared value'
- focus on SMART data / creation of a 'data hub' (data sharing by private companies) - address information gaps linked to important decision making around destination / capacity management & supporting strategic decision making
- EU rules around data protection (type of data being gathered on individuals e.g. tracking of peoples movements) represent new constraints on the type and use of data being collected
- technology enabled visits are a key destination driver, a lot of technology over promises & under delivers – Gen 'Z' unforgiving when technology doesn't live up to promises
- Mobile Apps can help curate (and enhance accessibility) to new experiences for visitors.

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