Edinburgh's 2030 Tourism Strategy — Final Draft Strategy

How to read this strategy

This document sets out the key themes, ambitions and principal recommendations for Edinburgh’s tourism development for the decade to 2030. It begins by putting Edinburgh's tourism development in context; in terms of the shifts and pressures in urban tourism around the world, as well as in terms of the city's expected urban growth in the coming years. Following this, it presents five priority areas for action which are designed to help the business of tourism to meet the city's long-term ambitions, in terms of inclusive, sustainable economic growth.

Who is this strategy for?

This strategy is intended to be read and shared by as wide an audience as possible. As Scotland’s national tourism strategy makes clear, “tourism is everyone's business”, and that is certainly the case in Edinburgh, where tourism either directly or indirectly affects almost everyone.

The strategy is intended to provide a strategic framework that will inform and shape the future of the city’s tourism sector up to 2030. It has been prepared as a Strategy for the city, and one from which a wide range of stakeholders will be expected to take their lead.

Tourism is playing an increasingly important role in the city’s economy. In addition to the benefits that tourism brings to the city, we recognise that it can occasionally pose challenges for the city too. For this reason, it is important that all stakeholders have a clear sense of purpose and direction in how to go about capitalising on these benefits and on addressing these challenges.

How was this strategy developed?

Commissioned by the Edinburgh Tourism Strategy Implementation Group, this strategy was developed in three phases during the period 2018-2019, involving multiple stakeholders from around the city, as well as a panel of international experts who are sharing their knowledge and experience to inform each stage of the strategy’s development.

Phase 1

November 2018 – May 2019

Evidence Review and Analysis; a study of 200+ resources evaluating tourism growth in the context of the city's broader urban development. This study is presented in a report, Setting the Scene.

Phase 2

March 2019 – July 2019

Industry & Stakeholder Consultations with over 200 individuals through stakeholder groups and 1:1 meetings. Stakeholders included tourism businesses in the city, officers and elected members of the City of Edinburgh Council, business associations, public sector agencies, and conservation groups. The findings were summarised in this report.

Phase 3

August 2019 – December 2019

As the strategy was drafted, it was tested, reviewed and refined through multiple stages. The public consultation exercise was a key element of the process, providing Edinburgh’s residents, businesses and tourism stakeholders with the opportunity to make their views known during November and December 2019 via the City of Edinburgh Council’s Consultation Hub. Once the consultation process was complete, the final draft strategy was updated to reflect public feedback, and was prepared for endorsement by key partners.

This document has been prepared by TOPOSOPHY Ltd, on behalf of the Edinburgh Tourism Strategy Implementation Group.
Tourism in a changing world

Edinburgh is known for many things; its landmarks and outstanding heritage, its dramatic topography, its iconic status as a hub of political power, commerce and culture and as the world’s leading festival city. It’s also the birthplace of great ideas that have helped transform the world through scientific progress, technological innovation and creative imagination. All of these things help to make Edinburgh a fine place to live, work, invest, study, and of course to visit.

A defining trend: tourism growth

During the lifetime of the previous Edinburgh 2020 Tourism Strategy, the city’s popularity as a destination has rapidly gathered pace, with substantial increases in the number of domestic and international visitors whose spending in the city has helped to create thousands of additional jobs. These increases reflect a global trend; as travel becomes more affordable and attractive to greater sectors of the world’s population, tourism is on the rise, and growth is expected to continue in the coming years.

However, as visitor arrivals increase, destinations around the world are asking searching questions: Is this growth sustainable for the environment and our communities? Is tourism working well for the city as a whole? Are our visitors getting the best possible experience that we can offer? How can we do better?

In Edinburgh, just as elsewhere, it’s time to go further and ask more of the visitor economy; to reduce its burden on the environment, to contribute more to residents’ quality of life, to exceed the expectations of our visitors and leave a lasting legacy of a better city for all.

Global context: megatrends shaping tourism demand

Of course, the city of Edinburgh doesn’t exist in a bubble. Trends and patterns of consumer behaviour sparked thousands of miles away can quickly start to shape the city in a multitude of ways. The following image outlines some of the main trends that are expected to influence demand for tourism in Edinburgh in the coming years:

![Diagram of megatrends shaping tourism demand](image-url)
Tourism in a changing city

‘Edinburgh is many different things to different people, but it is primarily a home; a home to over half a million people, and like cities around the world, it is growing’

Edinburgh is many different things to different people, but it is primarily a home; a home to just over half a million people, and like cities around the world, it is growing. Over the past decade Edinburgh's population has increased by 12% and by 2041 it is forecasted to grow to over 600,000. While it is good news for the economy that so many are choosing Edinburgh as a place to live and work, this increase will place new demands on the city to provide energy, jobs, affordable housing and transport.

Tourism in a place we call home

What makes Edinburgh so special? There are so many aspects of Edinburgh's character that attract visitors to come and discover the city, but first and foremost it’s our stunning heritage, located primarily in the Old and New Town (and recognised as a UNESCO World Heritage Site since 1995). Of course, the Old and New Towns aren’t just an attraction in their own right; they are home to thousands of residents, the principal backdrop to Edinburgh’s festivals and host to a wide range of shops, pubs, restaurants and visitor attractions.

In the coming years, protecting and enhancing the city’s built heritage will be of central importance to ensuring that residents and visitors for generations to come can enjoy Edinburgh in all its glory. This will mean not only taking care of buildings, but in ensuring a pleasant urban environment by enhancing our public spaces, improving pedestrian flows and tackling any tourism-related issues that negatively affect residents’ quality of life.

Tourism: an economic success story

Tourism is one of the city’s biggest success stories, attracting 4.54 million visits a year, who spend around £4 million in the city each day. The sector directly employs over 33,000 of the city’s 513,000 residents creating opportunities for residents from across our communities, upskilling our workforce and attracting talent from all over the world. It also has many indirect benefits through the wide and varied supply chain across Scotland that services the tourism sector here in the city. For the continued economic success of the city, it is important that the city is home to a sustainable, successful tourism sector.

Big things are coming to Edinburgh. Within a few years, the St James Quarter is due for completion, adding to a more extensive City Centre Transformation Project that will see major changes in the way that people experience and move around the city. Further afield Edinburgh’s Waterfront, Haymarket and the Forth Bridges Area are just a few of the areas within the city region that are undergoing development for the future enjoyment of residents and visitors. Making these areas destinations in their own right, and connecting them in a coherent, user-friendly way will be essential if we are to spread the impact of tourism further. It is also time to capitalise on Edinburgh’s status as a gateway city to as a gateway city to ensure that the wider city region and Scotland as a whole benefit from the city’s success.

Tourism in a city that we can be proud of

Scotland’s capital plays a vitally important role for tourism in the Edinburgh City Region and the country beyond. Edinburgh’s future success depends on it having a strong reputation on the global stage as an open, welcoming city where tourism is supported by residents, and the visitor economy makes a strong contribution to the city’s broader goals. Through implementing this strategy, we want to lead the way in showing that this really can be achieved, by nurturing a city and a model for urban tourism that we can be proud of.

Tourism that works for all

In recent years, Edinburgh has become an attractive place for businesses to invest, for skilled individuals to come and work and of course, for visitors. Yet deep-seated challenges remain, especially when it comes to ensuring that all residents can participate in the city’s economic success. As tourism grows it will be important to help tackle inequality by ensuring that the people of Edinburgh have increased access to fair, consistent work with good prospects for career advancement. It will also become even more important to ensure that Edinburgh’s residents feel part of their community and that they can enjoy the broad cultural offer that tourism helps to support.

As a major pillar of the city’s economy and a significant consumer of energy and producer of carbon emissions, Edinburgh’s tourism sector has a vital role to play in helping the city to meet this target. In fact, we believe that Edinburgh has the opportunity to lead the way in showing how a city can help its businesses, residents and visitors to make healthier, more climate-friendly choices.

Tourism in the city & beyond

Tourism for all seasons

Spreading the impact of tourism more evenly requires us to think more broadly about who is visiting Edinburgh, and at what time of year. Despite significant increases in visitors to the city in recent years, seasonality is still an issue, impacting on business viability and the opportunity for the sector to create more, and better quality, full time, permanent jobs. Targeting lower volume, but opportunity for the sector to create more, and better quality, full time, permanent jobs. Targeting lower volume, but high value visitors such as business events delegates during the quieter periods can help to address this.

Tackling climate change is the greatest challenge of our age and is essential for safeguarding the health and well-being of current and future generations, as well as the sustainable prosperity of Edinburgh as a whole. In 2019 the city declared a ‘climate emergency’ and has set ambitious targets for reducing carbon emissions to zero by 2030.

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A successful tourism sector working for a successful city

Today, tourism is an integral part of Edinburgh's thriving economy. Visitor spending represents an important source of external investment to the city, directly supporting over 33,000 jobs and a wide array of businesses. Visitors to Edinburgh also support a broad range of cultural venues and events throughout the year, which offers world-class cultural opportunities for residents both in Edinburgh and across the whole of Scotland, supporting Scotland's creative economy, as well as positioning Edinburgh on the international stage.

Tourism’s success can generate a chain of benefits for the city:

- Thriving visitor economy
- More & better jobs
- Reduced unemployment, poverty & inequality
- Ongoing investment in the city
- Better quality of life

Since 2010, tourism in Edinburgh has performed strongly against a backdrop of continuing economic recovery in the city’s main markets across the UK, Europe and US. The national tourism surveys show significant growth in the city, with a 54% increase in overseas visitors and a 29% increase in domestic visitors. Total tourism expenditure has grown by over 50% in real terms since 2010 supporting an additional 9700 jobs in the city.

From driving growth to managing growth

“IT’S TIME TO ADAPT OUR APPROACH BY WORKING TO MAKE TOURISM WORK BETTER FOR THE CITY”

Long-term projections show that tourism demand in Edinburgh will increase. Our tourism supply is growing too; hotels are under construction; transport connections are improving; the festivals are increasingly popular and developments such as the St James Quarter and Edinburgh’s Waterfront will create new reasons to visit the city.

Like its peers the city has traditionally focused on driving tourism growth, however in light of what we know about tourism in a growing city, it’s time to adapt our approach by working to make this growth work better for the city. It’s also time to recognize that some forms of tourism activity pose more challenges to the city than others, and that in the interests of all, there may be some difficult decisions to be made in the future.

In today’s world, change is the only thing of which we can be certain. Political turbulence, technological advances, the shifting sands of consumer values and the growing evidence of changes in the environment; these make for a complex setting for a 10-year strategy.

As a result, this document has been designed to set out a framework of guiding principles and headline recommendations rather than specific actions (these will follow in subsequent stages). This way, the strategy ensures that whatever the future holds, stakeholders can target their efforts towards achieving the best outcome for the city and its people. Our guiding principle should always be to ask: “how can we improve the quality of life for residents and contribute to the city’s broader economic goals?”

Helping to meet the city’s long-term ambitions

Our starting point is to address the following three questions:

1. What can tourism do for the city?
2. Where can the public and private sectors work together to target their efforts and make a difference, contributing to residents’ quality of life, the visitor experience and the economic vitality of the city?
3. How can we continually improve our approach to optimize the benefits that tourism brings, and to reduce its burden on the city?

The Edinburgh Economy Strategy (June 2018) provides the appropriate framework for defining our goals in the years to come. It identifies the ‘Eight Enablers of Good Growth’:

Through this strategy we aim to address every one of these enablers and set out a path for the city’s tourism stakeholders to follow that together, they can enable good growth.
The five priorities for action...

Towards 2030 we will nurture and develop...

In the following section we explain how Edinburgh's tourism stakeholders should target their efforts in order to address these five priority areas, by addressing the following questions:

→ How does it help to meet the city's broader goals?

→ What is the ambition?

→ What are the principal recommendations?

→ What are the key indicators for success?
We will nurture and develop our place

The ultimate goal

Edinburgh should be nurtured and developed as an excellent place to live and work, in doing so, this will help to make it a great place to visit. When residents have a good quality of life, and the built and natural environment is respected and protected, everybody benefits. Developing attractive spaces in and around Edinburgh means preserving and nurturing our outstanding world heritage and contemporary cultural offer, improving existing public spaces in the centre, while identifying, developing and connecting less visited parts of the city where both residents and visitors will want to spend time.

Our ambitions:

- Edinburgh’s built heritage and natural environment is cherished and cared for as a fundamental aspect of the city’s character.
- Edinburgh retains its authenticity as a “living, working” city with a reasonable balance between tourism and other aspects of economic activity.
- New tourism developments in the city will contribute to the quality of life for local people.
- Edinburgh is able to increase its appeal both to residents and visitors as new developments in neighbourhoods and the wider City Region are developed and easy to reach by public transport.

Place: Principal Recommendations

The tourism sector should take a more active role in supporting the delivery of the UNESCO World Heritage Site Management Plan in partnership with the relevant agencies in the city.

Tourism demand and visitor behaviour should be taken into account in major city projects, in order to fully understand and plan for the impacts that they will generate.

Research should be carried out to identify which spaces are liable to crowding and these should be prioritised for enhanced management.

There is a shared desire that the city’s existing regulations surrounding place management and property uses i.e. short-term lets should be enforced and upgraded where necessary, in order to improve the quality of life for local residents.

Edinburgh should be at the forefront of using new technology and data-driven solutions to manage the impacts of tourism more effectively, for example improve visitor capacity management in public spaces, visitor attractions and during peak periods.

Building use should be monitored, and where appropriate, measures taken to seek a balance of uses that respond to the needs of the city.

Extending tourism’s footprint into local neighbourhoods should be carefully managed and aligned with the City of Edinburgh Council’s Locality Improvement Plans (LIPs), which reflect the needs of that specific locality.

Edinburgh should strive to be an exemplar city in the delivery of accessible tourism.

Edinburgh should work to improve connectivity to and around the city, including seamless, integrated transport solutions and the development of online and physical wayfinding infrastructure.

Potential indicators for success:

- The level of support for tourism by local residents
- The level of visitor satisfaction on the visitor experience
- Comments and complaints received around issues such as property use and public realm
- Size of the long-term resident population within popular areas for visitors
- Level of visitor spending per locality
We will nurture and develop our people

The ultimate goal

The principal beneficiaries of this strategy should be Edinburgh's people. Tourism should directly contribute to the quality of life in the city, with the city's residents enjoying the benefits that a well-managed, responsible and thriving tourism sector generates. Nurturing people also means nurturing our visitors, ensuring that they receive a warm welcome and a fantastic experience as guests in the city, by giving them outstanding, educational and enriching experiences, and encouraging them to care for the city.

Our ambitions:

- Edinburgh’s tourism sector will directly contribute to the quality of life for Edinburgh’s residents via improved places, enhanced facilities, enriching cultural and educational experiences, access to fair and rewarding job opportunities and an environment that inspires and supports entrepreneurs
- The tourism workforce in Edinburgh is well trained and flexible to adapt to future demands of the workplace. Employees are led by motivated, inspiring leaders who are innovative and lead successful businesses
- Residents and visitors take pride in the city and respect the environment for those who call the city home
- Tourism developments in the city’s neighbourhoods should provide benefits for local residents, such as new employment opportunities, amenity improvements and better services

People: Principal Recommendations

- Residents should be consulted on tourism-related developments, for example, when Locality Improvement Plans are prepared, or when certain specific developments are proposed
- Monitor resident sentiment surrounding tourism in a consistent and sustained manner in order to inform tourism-related planning and decision making
- Encourage and facilitate local residents to engage and participate in cultural activities including events, festivals, and visits to museums and galleries
- Communicate with residents and visitors in order to identify and tackle nuisance issues. This should involve relevant tourism suppliers where appropriate
- Work to ensure that Edinburgh’s tourism sector is delivering fair, inclusive and rewarding jobs for those who are employed in the sector
- Ensure that business leaders have the right skills to operate responsible and efficient tourism businesses
- Help businesses to stay up to date with regulations that relate to workforce management (e.g. related to migration, work permits, health and safety)
- Assist businesses in planning and preparing for long-term changes in skills requirements (such as automation, digitalisation)
- Ensure that Edinburgh’s tourism workforce has the right skills (especially digital) to ensure that they meet the needs consumers’ evolving needs

Potential indicators for success:

- Percentage of tourism suppliers paying the living wage
- Number of jobs created with fair work conditions
- Employee satisfaction levels
- Participation of residents from lower-income backgrounds in cultural events and attractions
- Comments and complaints received on tourism-related issues / resident sentiment around tourism in the city
We will nurture and develop our environment

The ultimate goal

Edinburgh’s tourism sector should lead the way as an exemplar in achieving environmentally sustainable urban tourism. Guided by the city’s commitment to achieve net-zero carbon emissions by 2030, all tourism stakeholders will be actively engaged in helping the city to meet this target. By adapting to and capitalising on major city developments such as the City Centre Transformation as well as the city’s unique landscape and green spaces, Edinburgh will help its visitors and businesses to make healthy and environmentally sustainable choices.

Our ambitions:

- Tourism will proactively contribute to Edinburgh’s transition to net zero carbon emissions by 2030
- Visitors will make more environmentally sustainable choices throughout their visit to the city
- Edinburgh’s tourism businesses will embrace carbon emission and waste reduction as a source of competitive advantage

Environment: Principal Recommendations

- Establish a tourism sector-specific programme that contributes to the City of Edinburgh Council’s ambition for the city to transition to net-zero carbon emissions by 2030
- Edinburgh’s tourism sector should seek to measure its overall burden on the natural and built environment and put in place plans to mitigate this
- Edinburgh’s tourism sector should minimise waste and optimise use of existing resources through developments in the circular economy
- Ensure that visitor spending is retained within the local economy as much as possible, by promoting sourcing through local suppliers and actively supporting initiatives which promote platforms to showcase and sell Scottish-made products
- New developments and re-developments of existing sites should adhere to the highest standards in environmentally sustainable practices in terms of building design, energy use, waste management etc.
- Action should be taken to help visitors to reduce the environmental impact of their visit
- Tourism sector stakeholders should work together to co-design enhanced solutions for reducing the impact of tourism-related traffic

Potential indicators for success:

- Reduced carbon emissions related to tourism activity in Edinburgh
- Reduction of waste produced by tourism businesses
- Reduction tourism-related traffic in the city
- Increase in tourism-related developments that adhere to high environmental standards
- Increased percentage of Scottish-made goods used by and available through the tourism sector
We will nurture and develop our partnerships

The ultimate goal

Developing and nurturing strong partnerships at all levels is the key to ensuring that tourism in Edinburgh is able to effectively contribute towards the city’s long-term ambitions, as defined through the City of Edinburgh Council’s Economic Strategy Enablers of Good Growth (outlined earlier in this Strategy). The city should build on its existing strong network of industry and stakeholder partnerships, and seek to extend these, to include residents, in particular. As a result, nurturing partnerships will help the city take more consistent, consensual decisions on tourism development, as well as being flexible in adapting to changing conditions in the future.

Our ambitions:

- Stronger partnerships should help the city’s tourism stakeholders to become proactive in place management, secure more sustainable investment for achieving the goals of this strategy and ensure that the city is resilient
- Create the right conditions for a thriving, responsible, sustainable tourism sector
- Tourism continues to develop a well-integrated, collaborative and effective network of partnerships to deliver the strategy
- Edinburgh is an active partner in the wider Scottish tourism community, optimising its status as a gateway destination for the benefit of the city and other destinations in the country
- A new model is developed to promote effective dialogue between local residents and tourism stakeholders, in order to address specific challenges and deliver this strategy

Partnerships: Principal Recommendations

In order to manage tourism growth in a growing city, decision-making and implementation should become more closely integrated, with clear lines of responsibility and accountability between the constituent stakeholders, including residents

A dedicated multi-stakeholder group should be established to oversee the implementation of the recommendations on investments and monitor the effect/impact of the proposed Tourism Visitor Levy (TVL) on the local economy

Funds that are invested from the proposed TVL revenue should be transformative and directly related to the ambitions set out in this strategy. They should be aimed at achieving clear outcomes and visible success for the city that benefit both residents and visitors

Work in partnership to ensure the right conditions for a thriving, responsible, sustainable economy

Strengthen partnerships throughout the tourism supply chain to ensure that as much benefit as possible is retained within Scotland

Support tourism businesses to: drive innovation in product and service development, improve visitor experiences, improve productivity to enhance business viability, and create better opportunities for fair work

Partners should actively work together to encourage year-round sustainable tourism, with a particular focus on lower-volume, higher-value visitors, such as business tourism delegates

Edinburgh’s tourism sector should build on its relationships with other key sectors of the city’s economy, including the academic sector, travel tech, food & drink in order to encourage deeper forms of collaboration around shared goals

Edinburgh should build on its status as a gateway city for the rest of Scotland by building alliances with other Scottish destinations. These alliances should be aimed at increasing the overall value of tourism to Scotland, and on spreading the impact of tourism around the country as widely as possible

Edinburgh should strengthen its relationship with other international destinations in order to ensure continued knowledge sharing around best practices in urban tourism management and explore opportunities for collaborative working

Potential indicators for success:

- The quality and quantity of engagement from city tourism stakeholders in developing the action plan from this strategy
- The number of tourism businesses engaged in formal B2B partnerships in the city, and their level of satisfaction with these
- The number of partnership agreements implemented between Edinburgh and other Scottish and international destinations
- The level of satisfaction around investments from TVL funds
We will nurture and develop our reputation

The ultimate goal

Edinburgh’s best ambassadors are its residents, businesses and visitors. Therefore, we must work across a wide range of areas to ensure that the conversation around tourism in Edinburgh, both in the city and beyond is a positive one. We want Edinburgh to be well known for its progressive approach to managing tourism for the good of the environment and local communities, and the quality of the visitor experience. A good reputation will encourage visitors to recommend the city to others and return in the future. Working with national and international partners, we must concentrate on building the city’s reputation among sectors that will most help the city to address the Eight Enablers of Growth; for example, economic sectors that are aligned with the city’s strengths, and the cultural sector.

Our ambitions:

- There is a well-understood definition of Edinburgh’s vision as a city, of how its citizens would like to see the city develop in the future
- The city is positively reflected in national and international media for its approach to tourism management and delivery, and the quality of the visitor experience
- Residents are proud of their city; visitors feel welcome and highly satisfied with the quality of their visit to the city
- The city benefits from an enhanced reputation among residents and visitors and it lives up to its status as a capital city, by offering a diverse cultural offer that appeals to a wide range of audiences

Potential indicators for success:

- Residents’ satisfaction with tourism and its impact on the city
- The volume of positive coverage about the city in national and international media
- The level of visitor satisfaction and their ratings of the city’s products and services
- Edinburgh’s competitiveness across key economic and social indicators with its peers

Reputation: Principal Recommendations

Understand the issues and ambitions that are important to the people of Edinburgh (for example, through the Edinburgh 2050 Vision)

Develop new mechanisms to ensure that residents have the opportunity to be more informed and engaged in the delivery of this strategy

Manage tourism and engage with residents to ensure that the social and cultural benefits of tourism in the city are more widely recognised and accessible

The city should focus on place-based reputation management, by providing an optimal living environment for residents and a high-quality visitor experience

Work on the basis that ‘others do the talking’ about the city, and it is the city’s role to manage and enhance its reputation by curating and amplifying conversations which influence perceptions about the city

The city should strengthen partnerships with national and international agencies that can help enhance the city’s reputation and deliver key messages about the city’s strengths as a place to live, work, study, invest and visit

Focus on developing partnerships and on developing products and services that will enhance the city’s reputation, that are aligned with residents’ own vision of the city they would like to see and that will enhance their quality of life

Work within and beyond the tourism sector to ensure that Edinburgh strengthens its reputation in key sectors of its economy and that the city’s own business community can benefit from these relationships, for example, through business events held in the city

Develop a reputation for the city that goes beyond its traditional attractions and helps the city to become better known for the city’s status as an outward-looking, well-connected, contemporary European capital city with all the attributes and experiences that this implies
Delivering this strategy

Edinburgh's 2030 Tourism Strategy sets out a new approach to managing tourism across the city and the overarching priorities, ambitions and recommendations for the next 10 years. The first step in the delivery of the strategy is the development of the associated, and far more detailed, 3-year Action Plan. This will identify the key actions and agree, source and commit the resources required to realise the ambitions of the strategy.

It will also be essential to consider the leadership and governance of the strategy overall, as well as the management and delivery structures required to implement the Action Plan.

Next Steps:

- Review the city's current tourism leadership, governance and delivery mechanisms to assess if they are "fit for purpose" and where necessary adapt them to meet the requirements of the new Strategy.
- Develop the 3-year Action Plan for the delivery of the strategy.
- Establish appropriate SMART objectives, KPIs and a management and performance monitoring model.
- Identify and develop appropriate new mechanisms to ensure effective resident engagement.
- Establish the appropriate channels and mechanisms to engage with international, national and regional partners, as well as other sectors of the economy.
- Integration of the tourism strategy with wider city, regional and national strategies and policies.
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