Business opportunities:

Tourism in Edinburgh – key figures
Welcome

Welcome to the second edition of *Tourism in Edinburgh – key figures*, published by the Edinburgh Tourism Action Group (ETAG).

This guide provides a summary of Edinburgh’s key statistics on visitor profiles, transport connectivity, accommodation, leisure, and business tourism, for businesses directly or indirectly engaged with the sector; investors, entrepreneurs and anyone else with an interest in the city. This edition presents a graphical and engaging format that is simple to interpret and utilise, pulling together a range of studies and reports undertaken by ETAG and its partners.

*In 2011, total visitor spending was a staggering £1.16 billion.*


Over the last two decades the volume and value of tourism in the capital have grown dramatically. In 2011, visitor spending was a staggering £1.16 billion, compared to £250 million in 1990 and employment in tourism now accounts for about 12% of the city’s workforce, no less than 32,000 individuals. EDINBURGH 2020: The Edinburgh Tourism Strategy sets out aspirational and ambitious growth targets that will build on this success, deliver significant economic growth and at the same time strengthen the sustainability of the tourism sector. These targets for 2020 include (1) increasing the number of visits and visitors by 3% per annum (2) increasing average visitor spend by 10% and (3) to achieve 50% of additional visits between October and March.

We hope you find *Tourism in Edinburgh – key figures* to be a useful resource.

If you would like to request any additional information or provide feedback, please do contact us at admin@etag.org.uk

**Edinburgh context**

Edinburgh’s tourism businesses trade in a stable and prosperous environment and the city’s population grew constantly in the last decade. Edinburgh has a diverse economy, including strong financial and professional services sectors. Importantly, Edinburgh continues to be very popular with both domestic and international visitors.

“At Camera Obscura & World of Illusions we benefit greatly from Edinburgh being the most visited UK destination after London. The market is huge, the appetite for great experiences, fed by personal recommendation, is ever growing. Visitor numbers to our attraction have risen on average 10% a year for the last 12 years and we anticipate this will continue.

Our success is down to the quality of the visitor experience. How we look after visitors and develop our attraction and service is down to the calibre and commitment of our staff. We are lucky in Edinburgh – the great quality of life here attracts both professionals and students. We recruit from a rich pool of talent, then utilise that talent in trying to deliver an exceptional, world class visitor experience.”

Andrew Johnson, Director and Manager, Camera Obscura & World of Illusions
Population growth

The annual increase in population in 2011 – up 1.9% on the 2010 figure – was the highest annual increase ever experienced and reflects a consistent trend over the past 20 years.

Population of Edinburgh

Given the population growth over recent years, it is likely that Edinburgh’s population is now over half a million. Compared to the Scottish average, Edinburgh has more young adults and fewer children and older adults.

Age profile

Edinburgh’s workforce is one of the most highly qualified in the UK:

- 41.2% of the population hold a degree level or professional qualification. (This compares to a Scottish average of 37.2% and a Great Britain average of 32.9%).
- 53% of workers in Edinburgh are managers or professionals, compared to 43.5% of GB workers as a whole.

Employment profile

Employment and unemployment (July 2011-June 2012)

<table>
<thead>
<tr>
<th>Economically active</th>
<th>In employment</th>
<th>Employees</th>
<th>Self employed</th>
<th>Unemployed</th>
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Edinburgh’s visitor profile

Edinburgh attracts a strong mix of different types of visitors: local visitors on a day trip in the city, leisure visitors from across the UK or from overseas on a short stay or on holiday, and a significant volume of high spending business visitors.

Latest annual figures show Edinburgh attracts over 3.69 million staying visits*. Consumer research conducted by VisitScotland revealed that most of the UK segments with a warm relationship to Edinburgh are professionals interested in culture and history.

“When the Missoni family decided to open their first hotel they loved the idea of it being in Edinburgh. It’s a beautiful city that they had always admired, with a melting pot of international arts and culture; an ideal destination for the first Missoni hotel.

“Edinburgh attracts high volumes of tourists and business professionals each year, with a keen interest in culture, the arts, high end shopping and fine dining. The location of the hotel, next to the neighbouring Royal Mile, full of tourist attractions and beautiful architecture is the perfect location for us. We continue to greet guests from across the world and equally, have a loyal market in the UK with those people who appreciate great food, luxury living and the very best service.”

Carina Svenson, General Manager, Hotel Missoni

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**Notes:**
- **Edinburgh’s ranking among big* cities**
  - | # | City | GVA† per person | Employment rate | Education NVQ4 or above | Company start-ups |
  - | --- | --- | --- | --- | --- | --- |
  - | 1 | Edinburgh | Bristol | London | London |
  - | 2 | London | Edinburgh | Edinburgh | Edinburgh |
  - | 3 | Bristol | Leeds | Glasgow | Manchester |
  - | 4 | Glasgow | London | Bristol | Bristol |
  - | 5 | Leeds | Newcastle | Manchester | Leeds |

- * 8 core cities, plus London, Edinburgh and Glasgow
- †Gross value added

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**Recent city awards**

- **Europe’s Leading Destination: World Travel Awards 2012**
- **Favourite UK City: Telegraph Award 2012**
- **Best UK City: Guardian, Observer and guardian.co.uk Readers’ Travel Awards 2012**
ETAG’s Tourism Strategy 2020 identifies Younger Cultural Explorers from Germany, France, Spain, Italy and Ireland as the main target group in the international leisure market. This group is generally comprised of single person, pre-children or no children households who want to experience new countries and cultures.

UK Market Segmentation
The main priority segments for Edinburgh, as per VisitScotland’s segmentation system.

1. **Affluent southern explorers**
   - **Profile**
     - Most affluent segment
     - Wide age range (average age 45)
     - Professionals
   - **Lifestyle**
     - Not materialistic
     - Time / freedom for self
     - Authentic experiences
     - Broaden minds
     - Build knowledge
     - Environmental / green
   - **Holiday Motivations**
     - Travel important to lives
     - UK and abroad
     - Take longer breaks
     - Explore local culture
     - New and familiar
     - Get off beaten track

2. **Affluent active devotees**
   - **Profile**
     - Average age: 50
     - Above average Income
     - Professionals
   - **Lifestyle**
     - Busy lives
     - Like discovering new things
     - Like the finer things in life
     - Like new challenges and being active
   - **Holiday Motivations**
     - Well travelled
     - UK and abroad
     - Escape and relaxation
     - Experience seekers
     - Try new destinations

3. **Younger domestic explorers**
   - **Profile**
     - Average age 42
     - Above average income
   - **Lifestyle**
     - Work to live
     - Limited disposable income
     - Busy lives
     - Like to discover and explore
   - **Holiday Motivations**
     - Escape from routine
     - Relax and explore
     - Love UK breaks
     - Masses to see and do
     - Good value for money

4. **Northern sometimers**
   - **Profile**
     - Average age: 44
     - Average income
     - Jobs not careers
   - **Lifestyle**
     - Family is important
     - Less active and curious
     - Enjoy populist culture
     - Sedentary
     - Habitual in behaviour
   - **Holiday Motivations**
     - Prefer abroad (sun, sand and sea destinations)
     - Want to relax and do ‘nothing’
     - UK = city breaks
     - UK = poor value for money

In 2012, some 1,500 visitors were asked:

What was it about Edinburgh that made you want to visit the city?

- **15%** Shopping
- **15%** Edinburgh’s World Heritage Site status
- **19%** Friends/relatives in the city
- **23%** Personal recommendation
- **26%** Attractions
- **27%** A previous visit
- **49%** Castle
- **68%** Historic city

Which of these activities, if any, did you do on your visit?

- **City bus tour**
- **An excursion out of the city**
- **Visiting exhibitions**
- **Visiting art galleries**
- **Visiting museums**
- **Going out to pubs/bars**
- **Visiting attractions**
- **Going out to restaurants**
- **Shopping**
- **Walking around the city**

Source: VisitScotland: Scotland – An Insight Into Our Segments, 2011
Loosely defined as the ‘Generation Y’ demographic, those aged 25-34 years accounted for 23% of visitors to the city, which was higher than any other age group. Visitors aged 45-54 accounted for the second largest group – 22%, while visitors aged 35-44 accounted for 19% of all Edinburgh visitors.

<table>
<thead>
<tr>
<th>Age Group</th>
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<td>16-24</td>
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<td>25-34</td>
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<td>55-64</td>
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Overall

- **57%** of visitors to the city were from overseas countries in Europe, Asia, the Americas and beyond.
- The key overseas market was the USA. Distant cousins** count for more than 1/3 of all overseas visitors.

**combining the USA, Canada, Australia, South Africa and New Zealand.

- **33%** of all visitors in 2012.

Visitors from England accounted for 19% of all Edinburgh visitors.

<table>
<thead>
<tr>
<th>Origin of Visitors</th>
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<td><strong>Overseas</strong></td>
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<td>England</td>
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<td>Scotland</td>
<td>57%</td>
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<td>Northern Ireland</td>
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<td>Wales</td>
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<td>United States</td>
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<td>Germany</td>
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<td>Australia</td>
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<td>France</td>
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<td>Netherlands</td>
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<td>Canada</td>
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<td>Republic of Ireland</td>
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<td>Other</td>
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<td><strong>England</strong></td>
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<td>London</td>
<td>20%</td>
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<td>South East</td>
<td>18%</td>
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<td>Yorkshire &amp; The Humber</td>
<td>15%</td>
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<tr>
<td>North West / Merseyside</td>
<td>12%</td>
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<tr>
<td>North East</td>
<td>11%</td>
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<td>South West</td>
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Purpose of visiting Edinburgh

Visiting friends and relatives was the main reason for visiting Edinburgh for 32% of domestic, and 19% of overseas visitors. Domestic visitors were also more likely to visit Edinburgh on a business trip.

Expenditure by overseas tourists in Edinburgh

Edinburgh handles more than 25 million passengers at Edinburgh Airport and Edinburgh’s railway stations. The city is one of Scotland’s best-connected areas and, for many, is a gateway to the rest of Scotland.

“With Edinburgh being one of the most vibrant and culturally diverse cities in the world, Edinburgh Airport is extremely proud of the role it plays as the door to Scotland’s capital city. With over 9 million passengers travelling through the airport in 2012, and with a number of new international routes to be introduced in 2013, including Berlin, Istanbul and Toronto, we are looking forward to the future and working collectively with all of our stakeholders from across the tourism sector to guarantee Edinburgh as one of the top travel destinations in the world.

“We have invested heavily in Edinburgh Airport over the last several years in order to enhance our reputation for providing a first class passenger experience when they travel with us. This is something we will continue to do in the future and with our new re-branding now complete, we firmly believe Edinburgh Airport is now where Scotland meets the world.”

Gordon Dewar, CEO, Edinburgh Airport
Visitors’ form of arrival

Entries and exits at Edinburgh stations (in millions)

In May 2011, East Coast relaunched the Flying Scotsman, offering a daily service to London in 4 hours.

The First TransPennine Express service connects Edinburgh with north England, including Manchester and the Lake District.

Passenger numbers at Edinburgh Airport

Edinburgh Airport remains the key arrival point for visitors to Edinburgh with 41% of all visitors arriving by airplane. Trains were the second main form of arrival into the city.
Edinburgh’s accommodation

The city offers 12,910 bedrooms in 529 establishments in the serviced accommodation sector and 7,353 bedrooms in the non-serviced sector throughout the year.

The number of additional rooms available during the Festival period has increased substantially (from 6,126 beds in 2005 to 6,771 in 2012, an increase of 10.5%). Edinburgh’s occupancy rates almost reach 80%, among Europe’s highest, whilst room yields remain stable.

“In the UK, Edinburgh’s occupancy rates are second only to London and amongst the world’s highest (with an annual average nearly 80%). In the last few years, the city has also seen hefty growth in the number of serviced apartments but, at Chester Residence, we have found our niche in the market: we offer something quite unique for travellers – spacious, private, high-end living in a home from home environment with access to hotel facilities at a five star level.

“We provide luxury surroundings ideal for families, long and short term visitors – on business and leisure, who simply want something more relaxed and akin to the atmosphere they have at home. Our secret is simply that we look after our guests, very well. Whatever they ask for – if we can, we will!”

Rory MacAleece, The Chester Residence, Head of Group Operations Rothesay Residence Ltd

In 2011 and 2012, Edinburgh Airport was voted the winner of the Best European Airport handling 5-10 million passengers at the Airports Council International (ACI) Europe Awards.

It was rated second in Europe in the Airport Service Quality (ASQ) monitor in 2011.
Edinburgh’s serviced sector*

The number of 3 or 4 star properties has increased significantly between 2005 and 2012 – up from 76% to 85% of all hotels.

64% of all rooms the city offers are provided by the serviced sector – the majority of which is provided by hotels.

Edinburgh’s non-serviced sector*

Edinburgh’s Hotel Grading Mix*

1 Star = 2%
2 Star = 6%
3 Star = 44%
4 Star = 41%
5 Star = 7%

Source: Tourism Resources Company: City of Edinburgh Tourism Accommodation Audit 2012
In 2012, Edinburgh’s occupancy was third highest in Europe after London and Paris.

**Hotel development recent activity**

- Motel One, a German-based hotel operator known for affordable design, has chosen Edinburgh for its first UK outlet and opened to guests in December 2012.
- Tune Hotels opened its first ever Scottish hotel, Tune Hotel Haymarket, in January 2013.
- Accor Group have acquired the freehold of a property on St Andrew Square which it plans to open as a 103-bedroom hotel under its Ibis brand in the second half of 2013.
- Accor will also lease two Edinburgh properties located at Edinburgh Park and at SoCo Edinburgh, a redevelopment area between South Bridge and the Cowgate. Both hotels will open under the Ibis brand, in 2013 and 2014, respectively.
Edinburgh’s leisure and culture tourism

Edinburgh attracts visitors to its iconic Edinburgh Castle, as well as its museums, theatres, pubs and restaurants. Five of Scotland’s Top 10 visitor attractions in terms of visitor numbers are based in Edinburgh.

In 2012, the main Festival Fringe sold 1,857,202 tickets; visitors to the festivals spend £261 million every year in Edinburgh and Scotland as a whole.

“Each year Edinburgh’s Festivals welcome some 4.2 million attendances who generate £261 million of national economic impact, of which £41 million is spent on accommodation and £37 million in the city’s cafes and bars. 93% state that the Festivals are part of what makes Edinburgh special as a city, with 82% stating that Festivals make them more likely to visit Edinburgh again in the future. Our impacts are wide reaching and go beyond direct economic impacts.”

Faith Liddell, Director, Edinburgh Festivals

“Edinburgh’s Festivals 2012 Summer Season

Edinburgh International Book Festival hosted 225,000 people, the most in its history, and saw 3% increase in ticket sales from 2011.

Edinburgh Festival Fringe issued an estimated 1.85 million tickets only 1% less than the overall number of tickets sold in 2011.

The Royal Edinburgh Military Tattoo was sold out for a 14th consecutive year, with the BBC highlights broadcast drawing an audience of 5.4 million.

Edinburgh’s Festivals attendance 2012

| National Museum of Scotland | 1,893,521 |
| National Galleries of Scotland | 1,604,105 |
| Edinburgh Castle | 1,230,177 |
| St Giles’ Cathedral | 904,411 |
| Edinburgh Zoo | 810,937 |
| Royal Botanic Gardens | 721,827 |
| National War Museum | 492,743 |
| Scottish Parliament | 345,111 |
| Scotch Whisky Heritage Centre | 270,572 |

Top 10 visitor attractions (excl. Our Dynamic Earth)

Edinburgh’s leisure and culture tourism

Edinburgh attracts visitors to its iconic Edinburgh Castle, as well as its museums, theatres, pubs and restaurants. Five of Scotland’s Top 10 visitor attractions in terms of visitor numbers are based in Edinburgh.
Edinburgh’s business tourism

Edinburgh has remained relatively strong throughout the crisis. The consequences of the ‘credit crunch’ have been compensated by newer market entrants such as Virgin Money and Tesco Bank. Edinburgh’s event industry continues to be strong: the Marketing Edinburgh, Convention Bureau (MECB) secured a vast number of meetings during 2011/12 which will be attended by thousands of business visitors.

“Edinburgh enjoys many natural advantages which give it a strong competitive edge in both leisure and business tourism sectors. For the business delegate, it offers a wide range of excellent venues and hotel accommodation, backed by wonderful opportunities for the social programme. These attributes, coupled with the city’s global reputation as a centre of excellence in an array of academic disciplines, make it the perfect business and conference destination.

“Marketing Edinburgh, Convention Bureau is responsible for marketing and organising Scotland’s capital city as a premier conference, incentive and event destination. Our role is to raise the profile of Edinburgh as an inspiring conference destination and to work as a catalyst between the conference industry and all the venues and services that our partners offer. Attracting conferences and assisting our partners to make them happen is what we’re all about. Successful business tourism is a vital element of Edinburgh’s economy. The Bureau has, in this financial year to date, confirmed 115 conferences which will attract 38,888 delegates to the city between 2012 and 2018 with an economic benefit of £64 million.”

Sue Stuart, Director of Operations, Marketing Edinburgh

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<thead>
<tr>
<th>Country and city rankings*</th>
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<td><strong>ICCA City Rankings 2011</strong></td>
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The value of bookings secured by MECB’s Accommodation Booking Service in 2011-12 was £1.67 million.

In the financial year 2012/13 to date the Convention Bureau has confirmed 115 conferences which will attract 38,888 delegates to the city between 2012 and 2018 with an economic benefit of £64 million.

Of the conferences and events secured by the Convention Bureau in 2011-12, 87% were international association meetings.
About ETAG

ETAG’s role is to bring together the wide range of businesses which make up Edinburgh’s tourism sector. ETAG also plays a unique role in bringing the industry together with the public sector agencies who support key components of the tourism product, such as marketing and infrastructure development.

Business Benefits

Business development
ETAG organises a wide range of business events, from short Business Briefings, giving an insight into new developments in the city, to full day workshops on hot topics like making the most of social media.

Networking
Building your own business networks is a great way to make sure you keep up to date with latest news, share best practice and get some great ideas for your business.

Market intelligence
Access a huge amount of information about Edinburgh, from the Edinburgh Visitor Survey to specific research on festival audiences. The more you know about the visitor market, the more successful you’ll be in developing new services, products and collaborations.

Tourism is a fast moving industry, and ETAG can help you to keep up to date with the latest business opportunities, events and developments in the tourism sector. For more information visit: www.etag.org.uk

Organisations

City of Edinburgh Council
www.edinburgh.gov.uk/citycentremonitoring

Edinburgh Tourism Action Group
www.etag.org.uk

Office for National Statistics
www.statistics.gov.uk/hub/people-places/people/tourism

Scottish Development International
www.sdi.co.uk

Scottish Enterprise
www.scoent.co.uk

Tourism Intelligence Scotland
www.tourism-intelligence.co.uk

VisitBritain
www.visitbritain.org/insightsandstatistics/

VisitScotland
www.visitscotland.org/research_and_statistics.aspx

Resources

Access background information, reports and resources about tourism in Edinburgh at www.etag.org.uk/information.asp

Tourism in Edinburgh - key figures was delivered in partnership with Scottish Enterprise.
Passengers pass through the airport per day, at an average of 280 flights per day. Some 30% of the Airport’s passengers were from overseas in 2012 – up from 16% in 2005.

An average of 25,200 passengers pass through the airport per day, at an average of 280 flights per day. Some 30% of the Airport’s passengers were from overseas in 2012 – up from 16% in 2005.

Purpose of visit

- International: 44%
- Domestic: 32%
- Visiting friends & relatives: 19%
- Holiday: 6%
- Business: 12%
- Other: 3%

Occupancy

- London: 80.73%
- Paris: 78.88%
- Edinburgh: 77.20%
- Amsterdam: 75.04%
- Hamburg: 74.58%

Achieved occupancy in 2012