Tourism in Edinburgh
Quarter 3, 2013

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Central Business Improvement District

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Tourism in Edinburgh

Quarter 3, 2013 Report

Welcome to the third edition of this tourism report compiled from a range of jointly funded research sources.

As the reporting cycle covers the key festival period, the Q3 results are extremely encouraging with year on year decline in only one out of the 10 key measures. Particular highlights are:

- Business confidence (percentage optimistic, less percentage pessimistic in the tourism sector) in 2013 has shown a step-change. Contrary to the typical cyclical pattern seen since 2010 of peaking in Q2 then declining in Q3, Q3 2013 has hit a 3-year high and contributed a 4th period of consecutive growth.
- New highs have been achieved in Airport passenger index, footfall, visitor attractions index, hotel occupancy, revenue per available room, achieved daily rate, business confidence and hotel forward bookings.
- Visitors continued to rate Edinburgh better value for money than 5 comparator cities including London.

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Tourism in Edinburgh

Quarter 3, 2013

	This period	Last period	Change	Change ↑↓	Comment
Performance -Edinburgh Airport Passenger Index	176	163	+13% points	↑	Quarter 3, 2013 monthly average comparison with previous year.
- Visitor Attractions Index	221	197	+24 points	↑	Quarterly average compared with same quarter last year.
-Hotel Occupancy	86.2%	82.5%	3.7% points	↑	Latest monthly comparison with previous year.
-Achieved Daily Rates	£77.29	£72.60	6.5%	↑	Latest monthly comparison with previous year.
-Revenue Per Available Room	£66.61	£59.87	11.3%	↑	Latest monthly comparison with previous year.
Outlook -Forward hotel bookings	27.8%	25.9%	+3.0 % points	↑	Average monthly forward bookings to April, 2014. As at November, 2013, compared with 2012.
-Business Optimism	27.8%	-27.3%	+55.1% points	↑	% or respondents optimistic less the % of respondents pessimistic. Latest quarterly comparison with previous year.
Edinburgh Visitor Survey results -Visitor Spend	£81.72	£81.74	0.0%	-	Quarter 3 2013 compared with quarter 3 2012
Edinburgh Visitor Survey results -Satisfaction with trip (8+/10)	90.2%	91.0%	-0.8% points	↓	Quarter 3 2013 compared with quarter 2 2013

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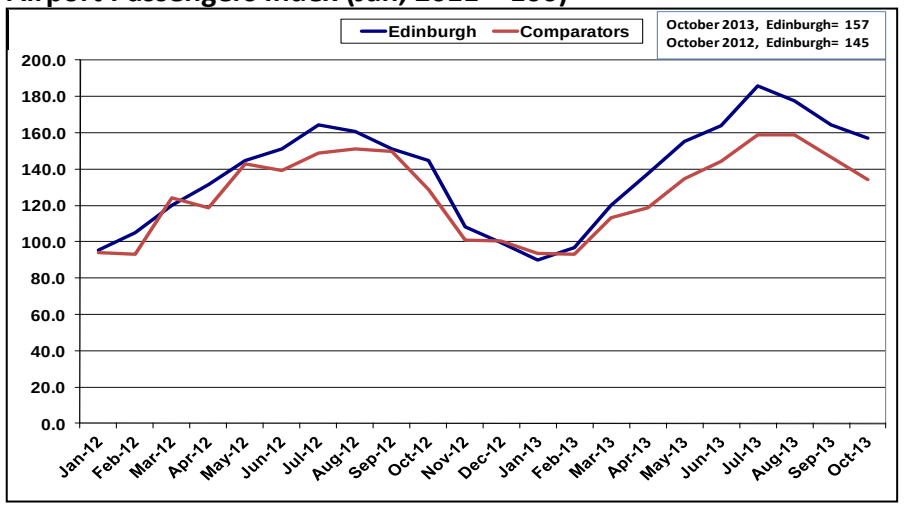
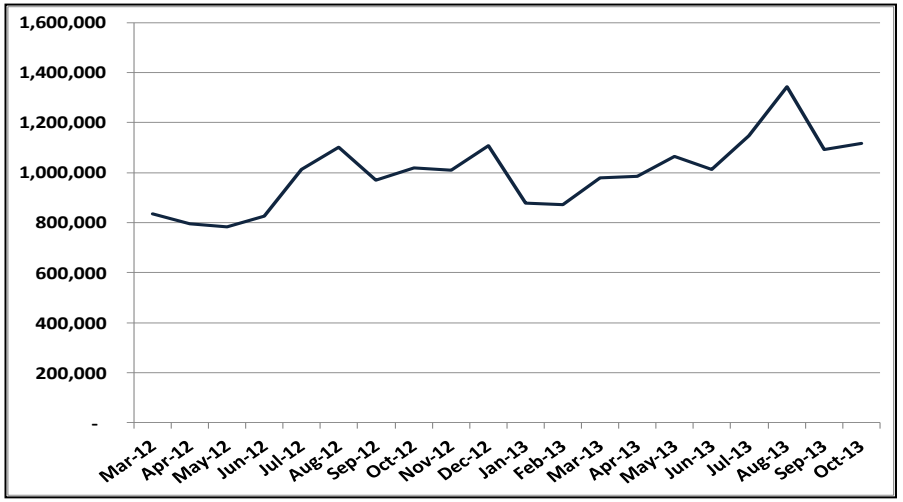
Visitor Numbers in Edinburgh

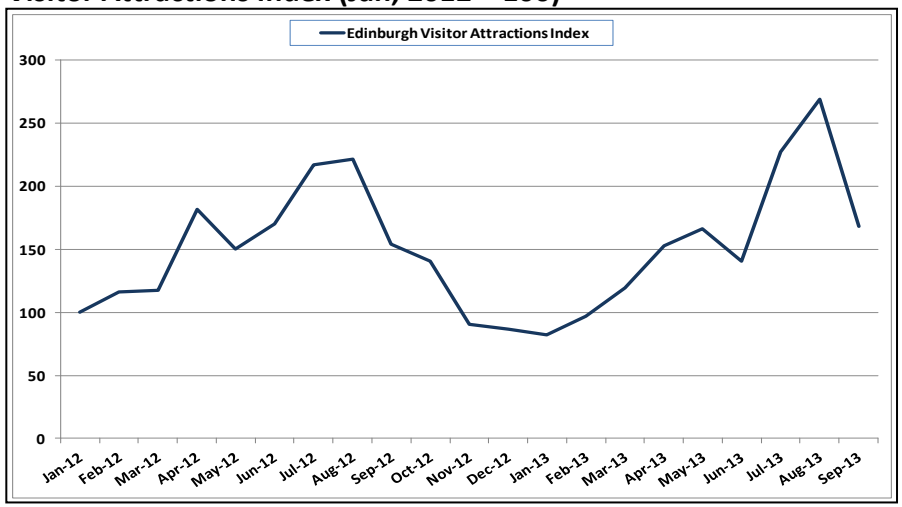
Airport Passengers Index (Jan, 2011 = 100)



Footfall on Princes St



Visitor Attractions Index (Jan, 2012 = 100)

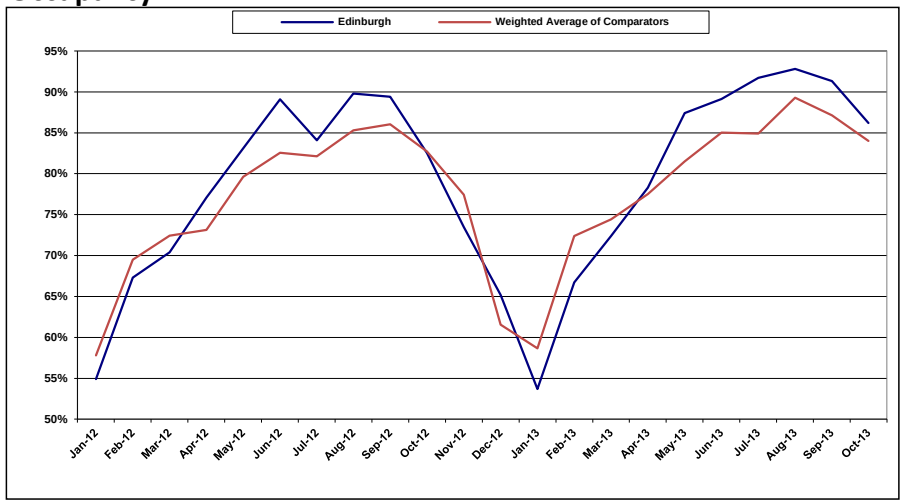


Commentary

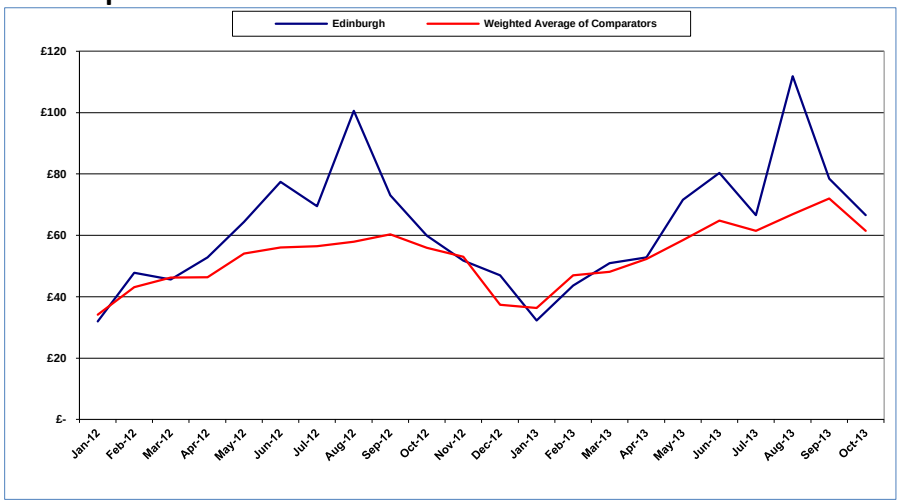
- Airport passengers index reached a new high in July 2013 and has maintained its advantage over comparator airports
- Princes Street footfall peaked at a new high of 1.34 million pedestrians during August and has maintained the YOY growth trend in September & October. There was an increase of 2.2% from September to October with the latest count at 1.12million pedestrians.
- The visitor attractions index also reached a new high in August and at 168 in September is still 14 points higher than the same month last year.

Hotels Performance in Edinburgh

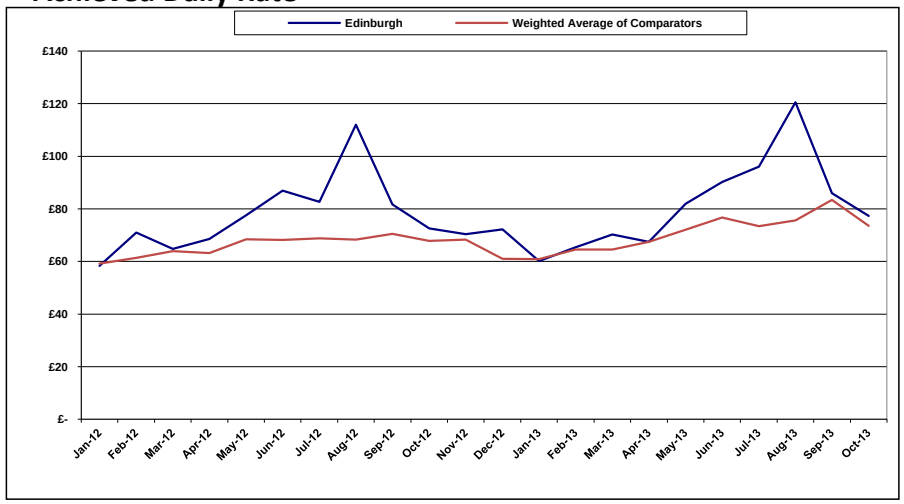
Occupancy



Revenue per available room



Achieved Daily Rate

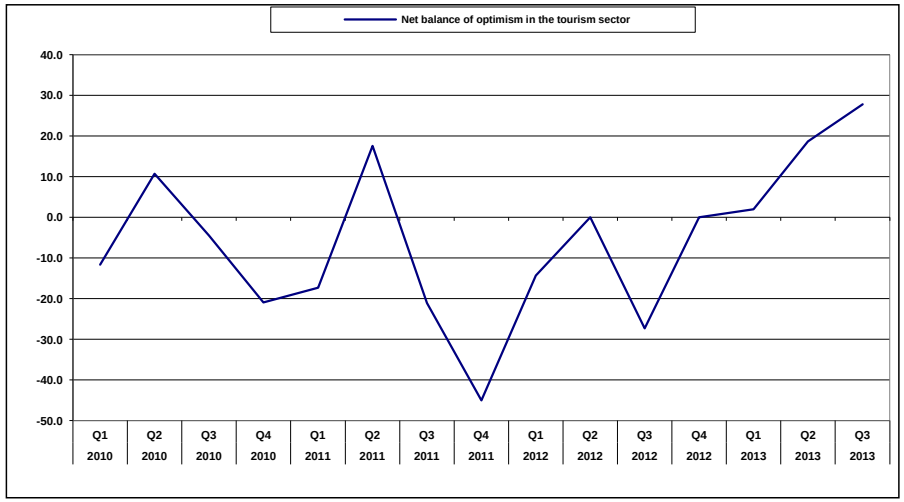


Commentary

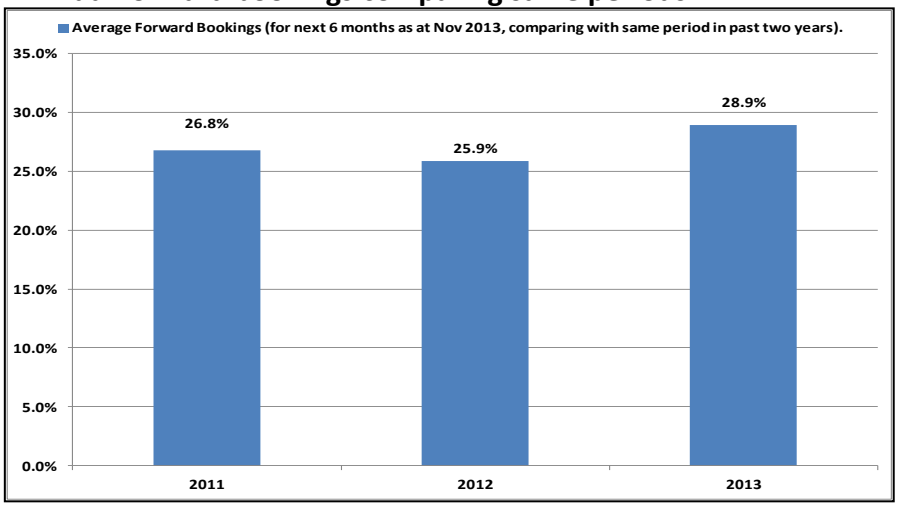
- Hotel occupancy peaked at 92.8% in August 2013 and unlike last year, September & October rates are still higher than comparators in absolute terms.
- Edinburgh's hotel revenues, spread across all available rooms whether occupied or not, peaked in August at £111.83 and have stayed ahead of comparators in the following two months
- Edinburgh's achieved daily hotel rates are higher than comparators for every month this year, significantly so in August 2013.

Tourism Outlook in Edinburgh

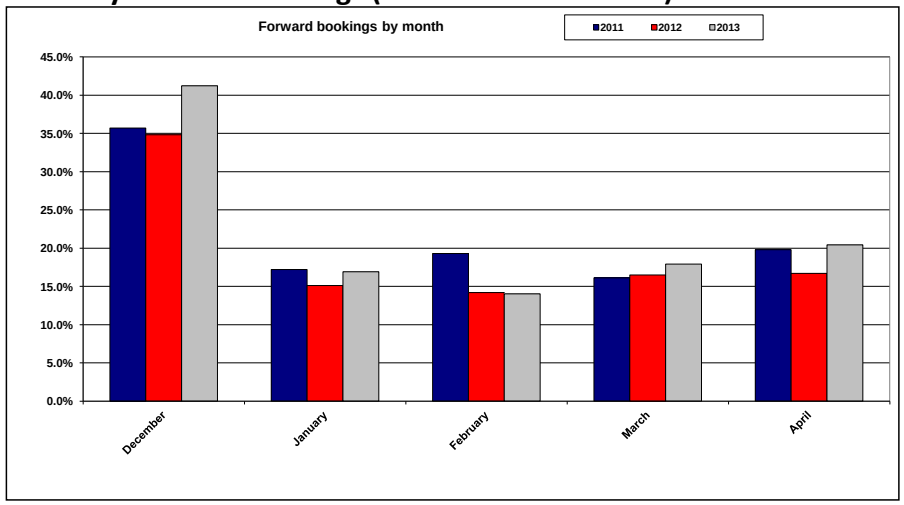
Business Confidence



Annual forward bookings comparing same periods



Monthly forward bookings (as at November 2013)

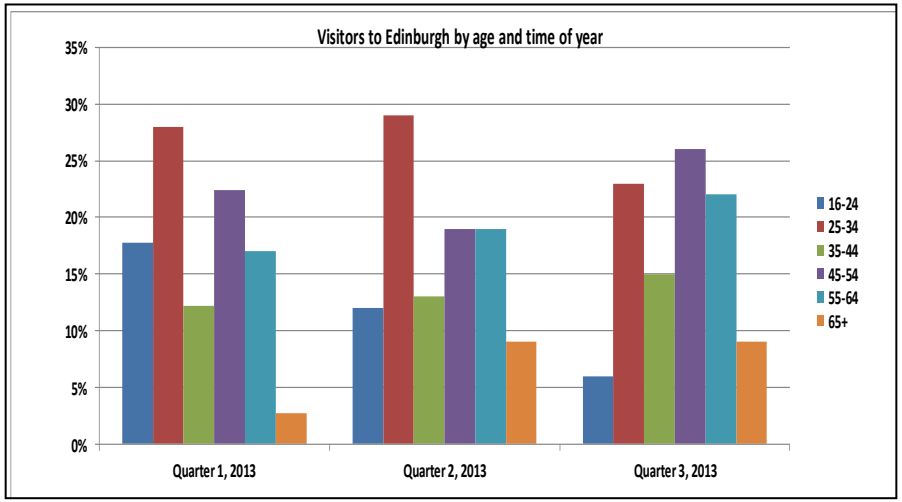


Commentary

- Contrary to the prior pattern of decline typical in the third quarter of the year, the net balance of business confidence (percentage optimistic, less percentage pessimistic in the tourism sector) is at a 3-year high of 27.8% in Q3 2013.
- Forward bookings at November 2013 (the latest available data) for the next 5 months (to April, 2014) are ahead of the previous two years.
- Forward bookings for all months to April 2014 are up on last year with the exception of February which shows a modest decline.

Edinburgh Visitor Survey Results

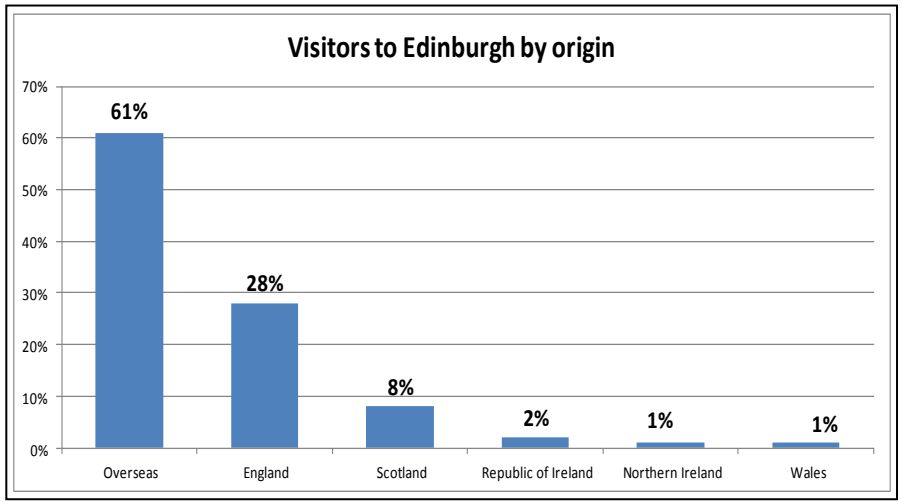
Visitor Profile



Visitor Expenditure

Average Expenditure by Visitors	Q3 2012	Q3 2013 (latest)	Change on last year
Accommodation	£34.46	£34.35	-0.3%
Eating/drinking	£18.94	£18.08	-4.6%
Shopping	£13.83	£14.26	3.1%
Entertainment	£10.32	£10.53	2.1%
Travel/transport	£4.19	£4.49	7.2%
Total	**£81.74**	**£81.72**	**0.0%**

Origin of Visitors

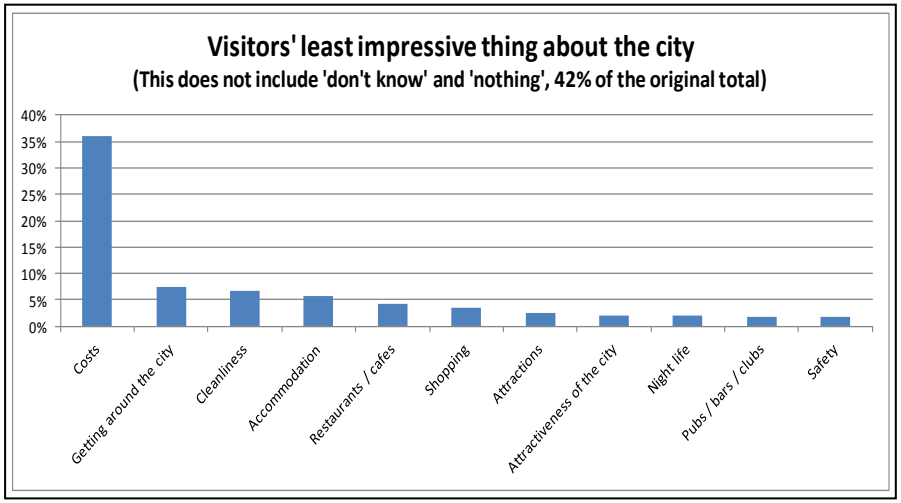


Commentary

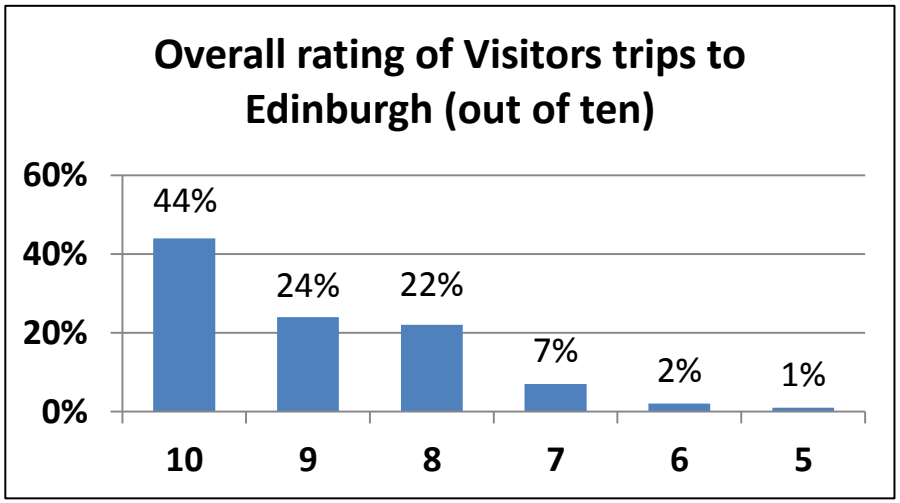
- The largest group of visitors to Edinburgh in quarter 3 2013 was the 45-54 year old age group, which outstripped the 25-34 group for the first time in the previous two quarters.
- The largest daily expenditure by visitors is on accommodation, at £34.35 per person per night during Q3 2013, a slight decline on the previous year. Eating and drinking was the second largest expenditure at £18.08. Both of these dropped in self-reported spend whereas all other expenditure categories increased on the previous year. Overall spend was flat.
- 61% of visitors to Edinburgh during Q3 2013 were from overseas. Visitors from England accounted for 28% of visitors.

Edinburgh Visitor Survey Results

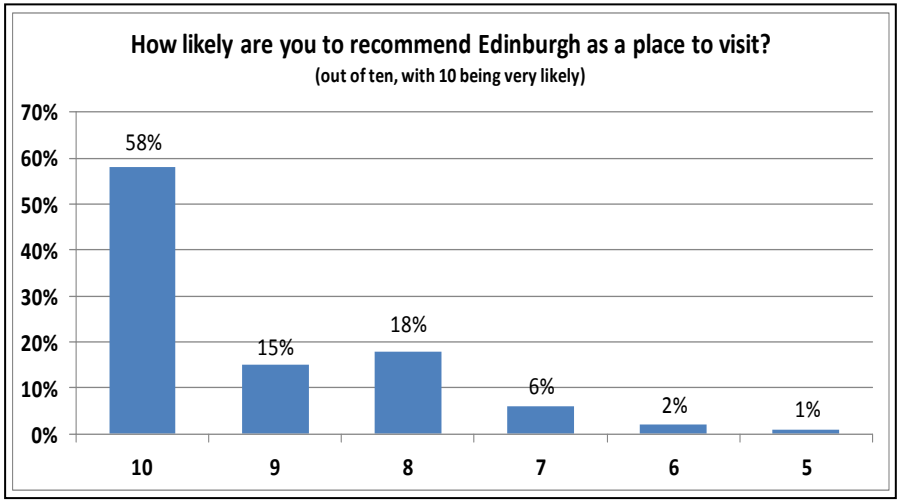
Reasons tourists visit Edinburgh



Overall rating



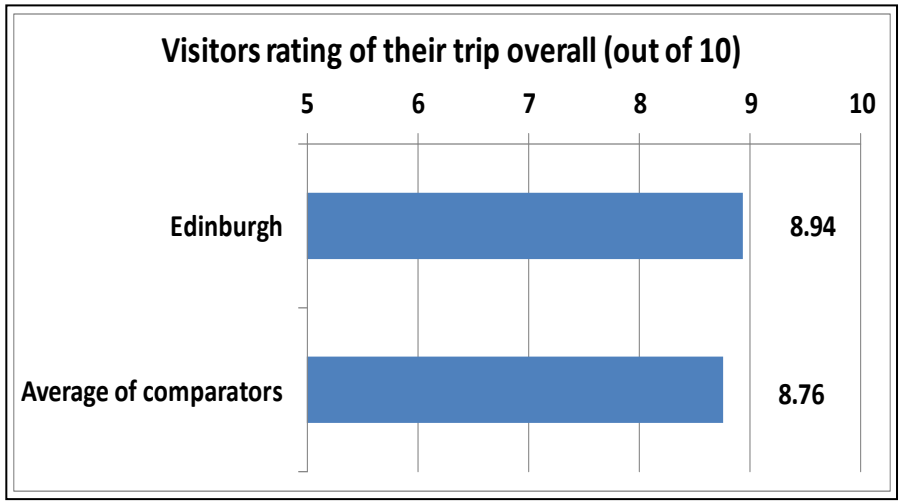
Visitors likelihood to recommend Edinburgh

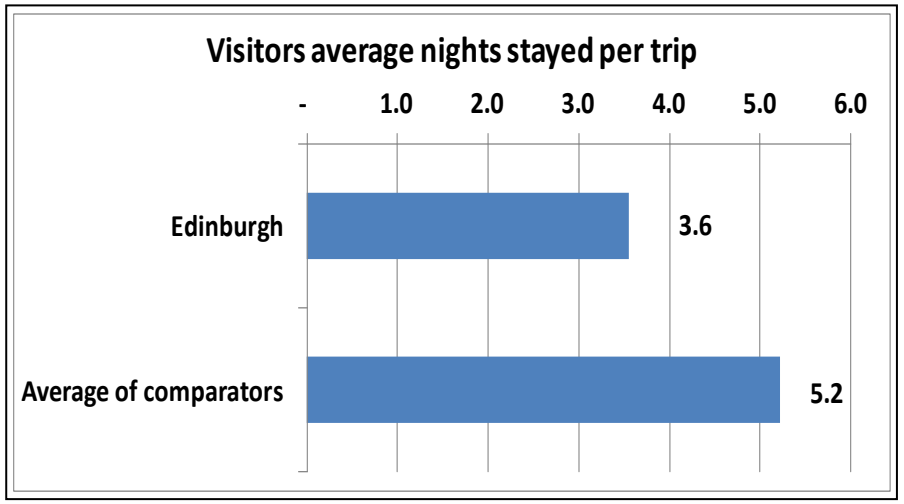


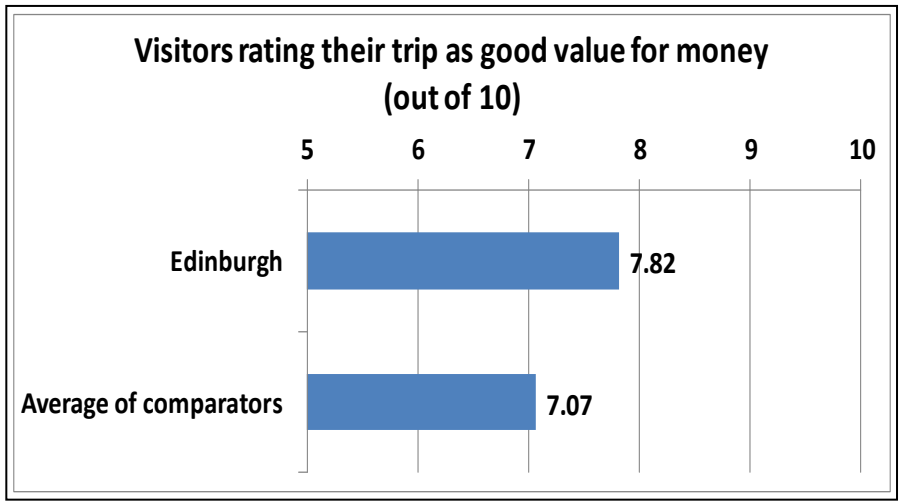
Commentary

- Visitors were asked what the least impressive thing about the city was. After discounting the 42% who said nothing, the next largest category by some margin was ‘costs’.
- However, 92% of respondents rated their trip as 8 or more out of ten.
- 58% are certain to recommend Edinburgh as a place to visit. No respondents gave a response of less than 5 out of ten as their likelihood to recommend Edinburgh.

Edinburgh Visitor Survey: Benchmarking results







Commentary

For the period quarter 3, 2013

- Edinburgh visitors rated their trip to Edinburgh, on average, 8.94 out of 10. This is higher than the average of comparator cities where trips were rated on average 8.76 out of 10 and higher than the previous quarter.
- Visitors to Edinburgh stayed on average 3.6 days during quarter 3 2013. This is less than comparator cities average of 5.2 days.
- In terms of value for money, Edinburgh visitors rated their trip 7.82 out of 10 compared with 7.07 out of ten reported in comparator cities. Again this is an increase on the previous quarter.

Tourism in Edinburgh monitors the performance of the tourism sector in Edinburgh. The publication is compiled in collaboration with: The City of Edinburgh Council, Essential Edinburgh, Marketing Edinburgh and Scottish Enterprise with Lynne Jones Research.

To subscribe contact: businessintelligence@edinburgh.gov.uk

Notes:

1. Flight comparator airports are: Birmingham, Bristol, Cardiff, Gatwick, Glasgow, Leeds, Liverpool, London City, London Heathrow, Luton, Manchester, Newcastle, Stansted.
2. Visitor attractions index is based on the average visitor numbers in January 2012. Attractions are: National Museum of Scotland; Edinburgh Castle; St Giles Cathedral; Edinburgh Zoo; Scottish Parliament; National War Museum; Scotch Whisky Experience; Museum of Childhood; City Art Centre and the Royal Yacht Britannia.
3. Hotel comparator cities are the Cities and Towns of: Aberdeen, Dundee, Glasgow, Inverness, St Andrews, and Stirling.
4. Business Confidence is the net balance of the percentage of respondents who are optimistic and who are pessimistic about tourism in Scotland as reported by the Scottish Chambers of Commerce.
5. Further, more detailed Tourism Forecaster information is available from Marketing Edinburgh.
6. There were 377 respondents to the Edinburgh Visitor Survey during Quarter 3, 2013.
7. Respondents to the question saying 'nothing' and 'don't know' were removed from the analysis presented here. This accounted for 42% of the original total of respondent's opinions showing that a large proportion was completely satisfied with Edinburgh as a visitor destination.
8. Benchmarking information from the Edinburgh Visitor Survey compares responses to visitor surveys in the following locations: Stirling, Chester, Glasgow, York and London.