

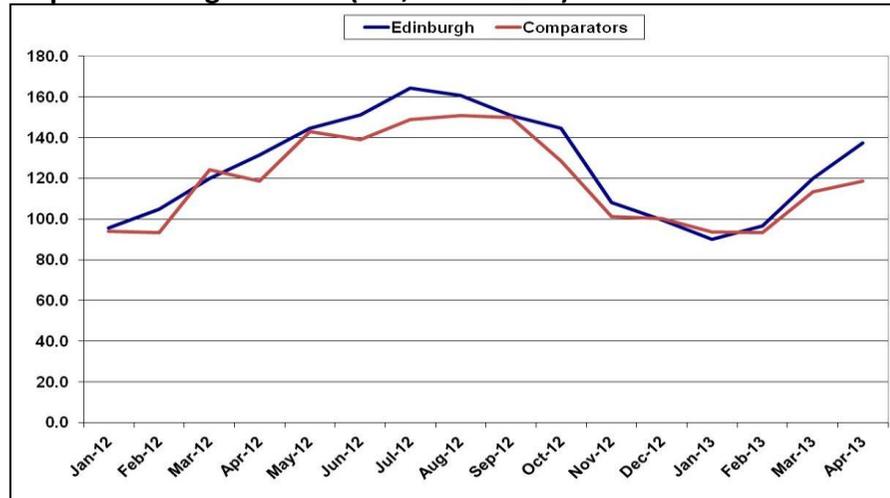
# Tourism in Edinburgh

## Quarter 1 2013

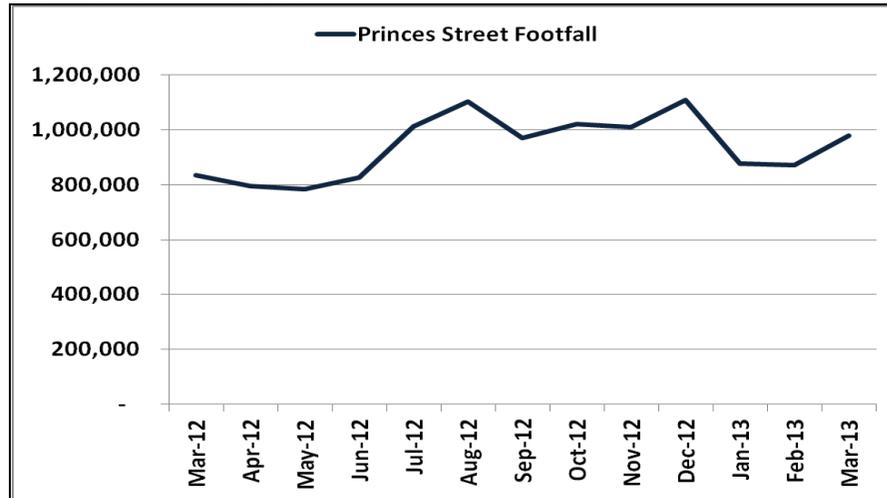
	This period	Last period	Change	Change ↑↓	Comment
<b>Performance</b>					
-Edinburgh Airport Passenger Index	104.9	96.7	-8.2 % points	↑	Monthly comparison
- Visitor Attractions Index	128	105	+23 points	↑	Monthly comparison with previous year
-Hotel Occupancy	67.3%	66.7%	0.6% points	↑	Monthly comparison with previous year
-Achieved Daily Rates	£65.44	£70.94	-8.4%	↓	Monthly comparison with previous year
-Revenue Per Available Room	£43.62	£47.08	-7.3%	↓	Monthly comparison with previous year
<b>Outlook</b>					
-Forward hotel bookings	32.5%	31.1%	+1.4 % points	↑	Forward bookings as at Feb 2013 compared with 2012
-Business Optimism	0.0	-45.0	+45.0	↑	% optimistic less % pessimistic
<b>Edinburgh Visitor Survey results</b>					
-Visitor Spend	£85.86	£82.62	-3.8%	↑	Quarter 1 2013 compared with quarter 1 2012
<b>Edinburgh Visitor Survey results</b>					
-Satisfaction with trip (8+/10)	89.5%	90.8%	-	↓	Quarter 1 2013 compared with quarter 1 2012

# Visitor Numbers in Edinburgh

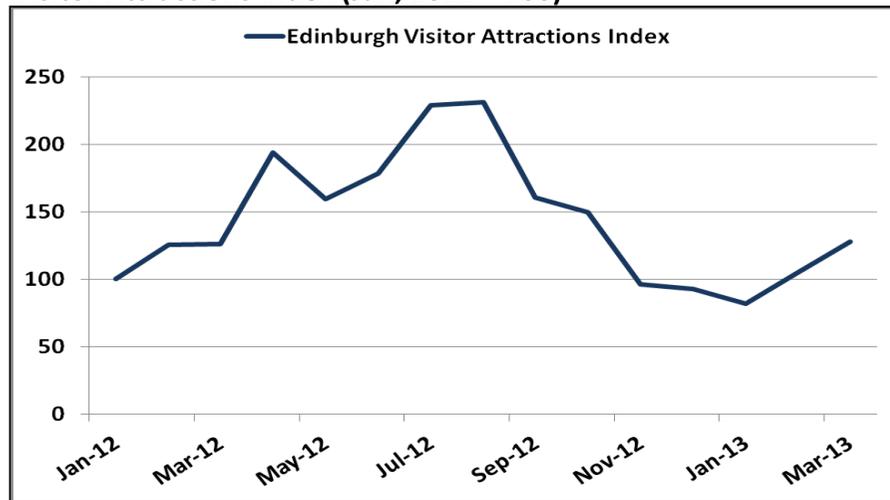
**Airport Passengers Index (Jan, 2011 = 100)**



**Footfall on Princes St**



**Visitor Attractions Index (Jan, 2012 = 100)**

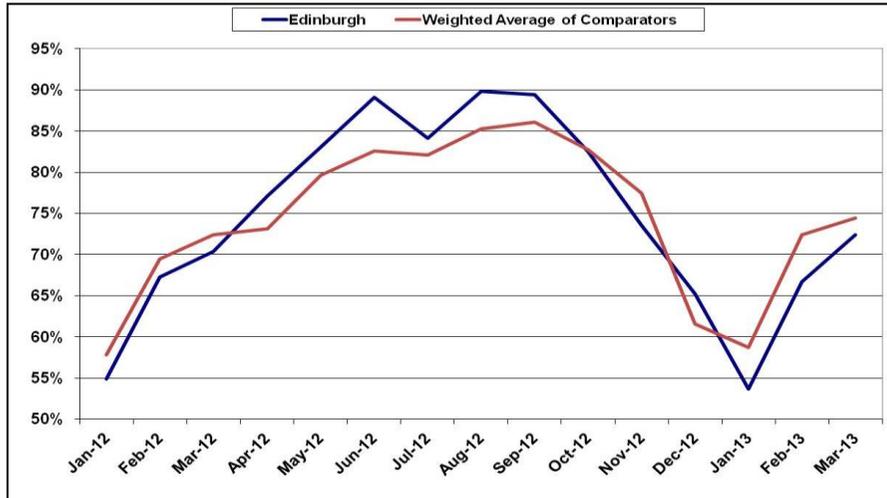


**Commentary**

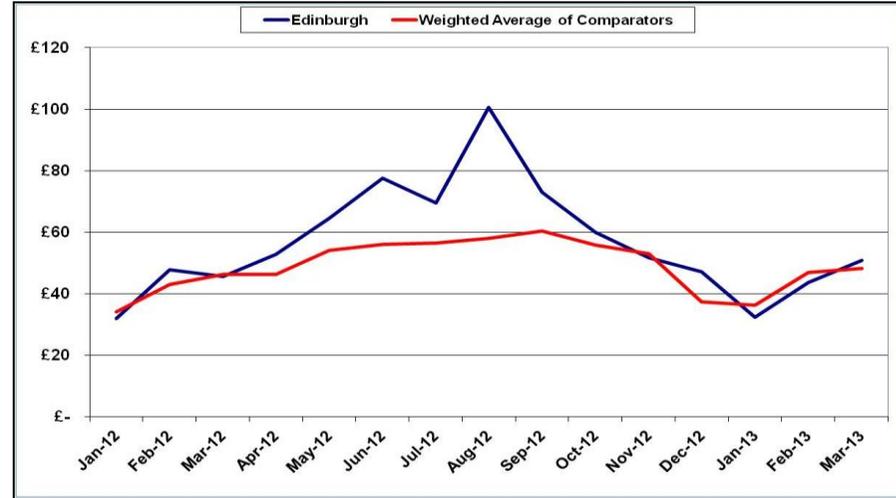
- Airport passengers have increased during the first quarter of 2013. From a trough in January they have increased more than comparators.
- Princes Street footfall has increased by 17.4% on March 2012 .
- The visitor attractions index, based on the average value in Jan 2012, has increased by 2 index points in March 2013, compared to the previous year.

# Hotels Performance in Edinburgh

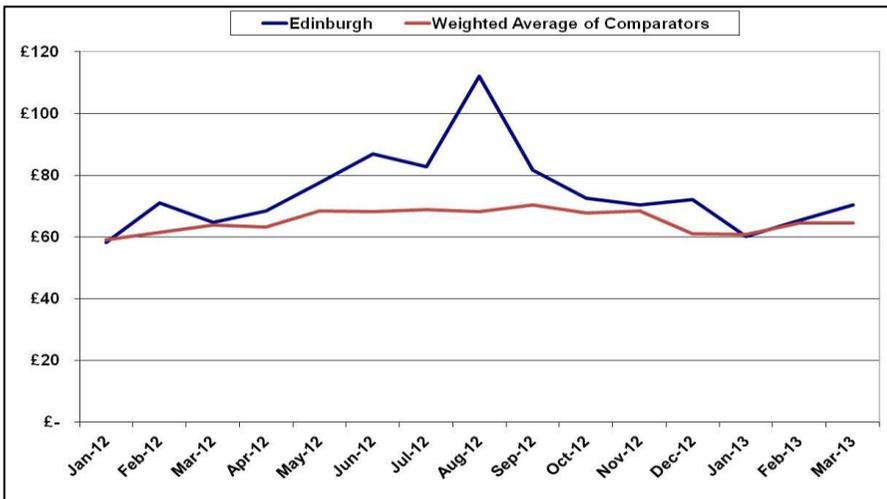
## Occupancy



## Revenue per available room



## Achieved Daily Rate

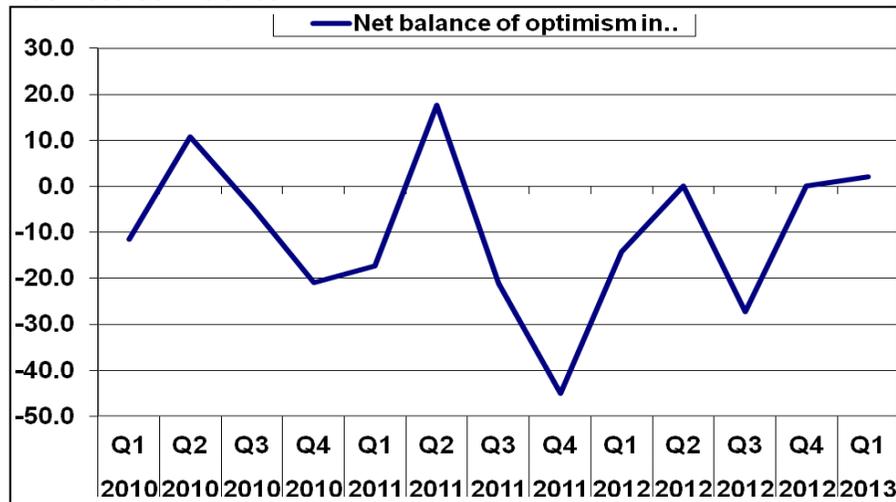


## Commentary

- Hotel Occupancy has increased steadily in the first quarter of 2013. This reflects the seasonality of the sector. Edinburgh's occupancy has a higher peak and deeper trough compared to other cities.
- Edinburgh's hotels' revenues spread across all available rooms, whether occupied or not, is marginally higher than comparators.
- Edinburgh's achieved daily rates are higher than comparators for almost every month since January 2012.

# Tourism Outlook in Edinburgh

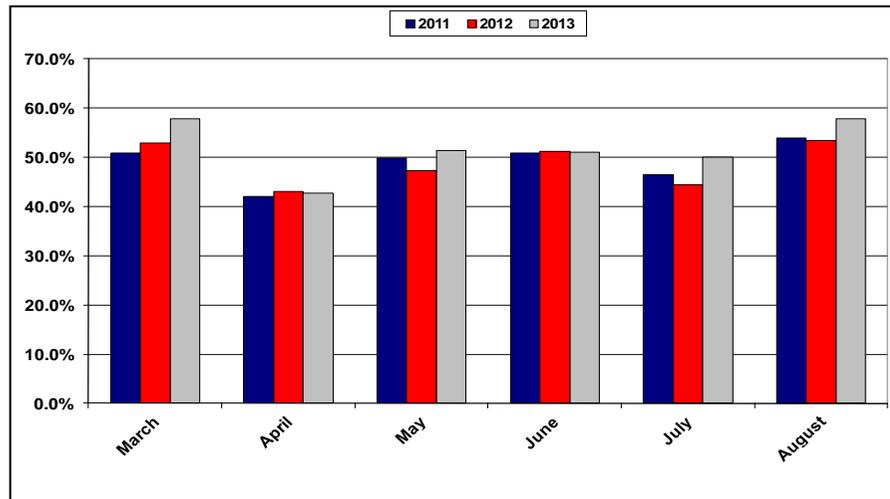
Business Confidence



Annual forward bookings comparing same periods



Monthly forward bookings (as at February 2013)

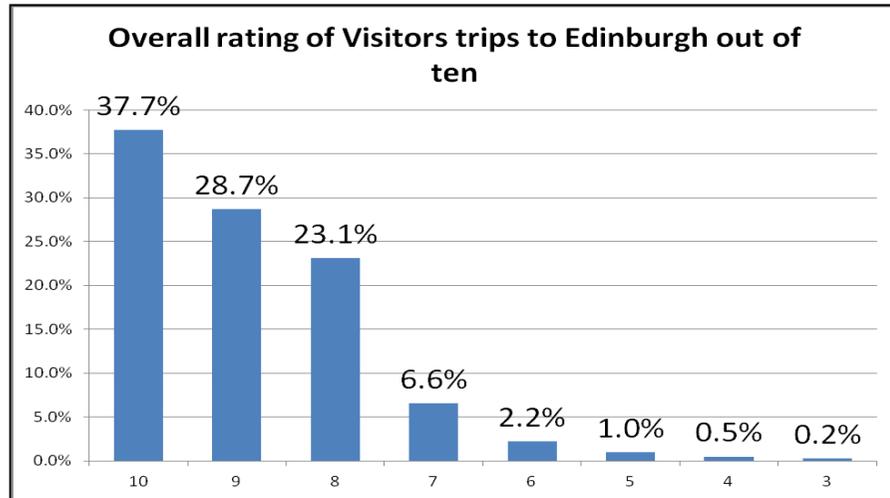


## Commentary

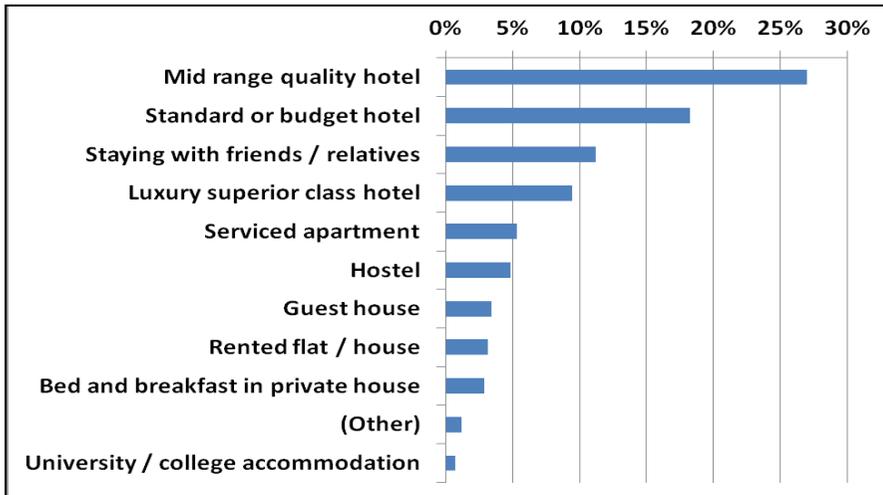
- The net balance of business confidence (percentage optimistic, less percentage pessimistic) is 2% for the first quarter of 2013.
- Forward bookings during February (the latest available data) are down on the average of the previous two years.
- Forward bookings for the months of July and August are up on the previous two years. June forward booking for 2013 is comparable with the previous two years.

# Edinburgh Visitor Survey Results

## Edinburgh Visitor Survey



Average Expenditure by Visitors	Q1 2012	Q1 2013	Change on last year
Accommodation	£30.64	£28.34	-7.5%
Eating/drinking	£23.75	£24.02	1.2%
Shopping	£16.22	£15.86	-2.2%
Entertainment	£10.09	£9.25	-8.3%
Travel/transport	£5.17	£5.14	-0.6%
<b>Total</b>	<b>£85.86</b>	<b>£82.62</b>	<b>-3.8%</b>

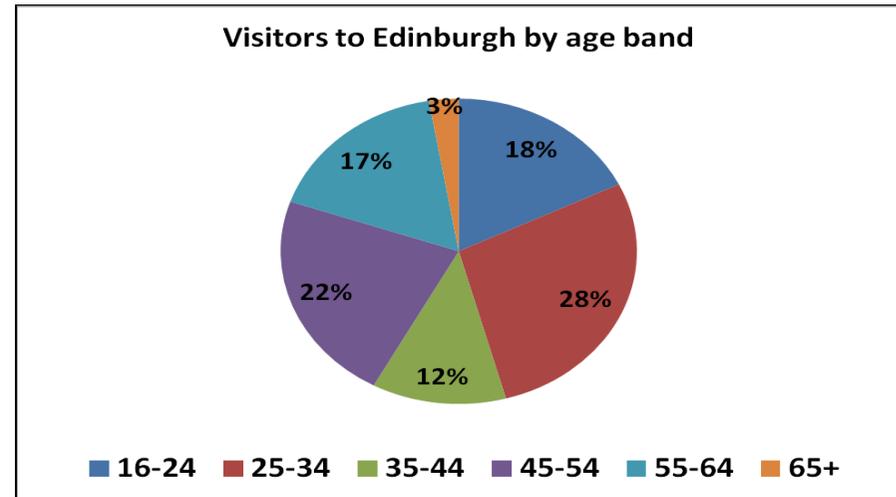
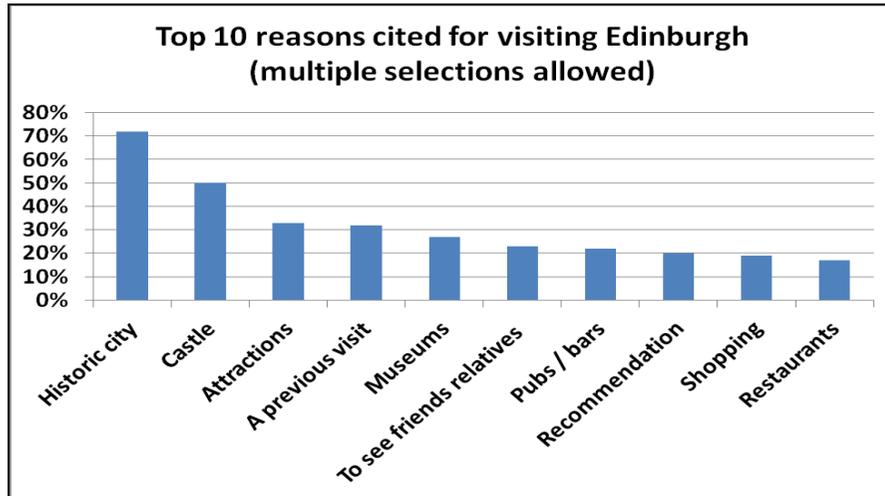


## Commentary

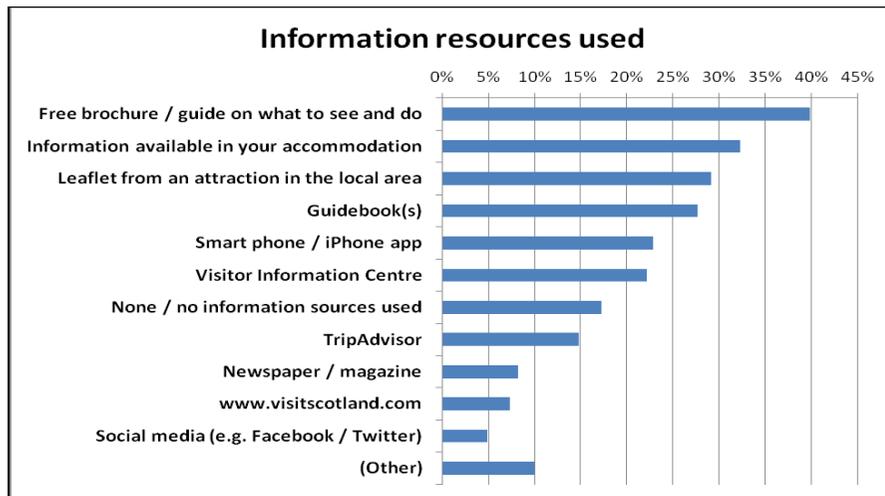
- The majority of visitors to Edinburgh had a high satisfaction with their trip. 90% rated their trip 8+ out of ten. No visitors rated their trip below 3 out of ten.
- The largest daily expenditure by visitors is on accommodation, at £28.34 per person per night during Q1 2013. Eating and drinking was the second largest expenditure at £24.02 in Q1 2013.
- 27% of visitors stayed in mid-range hotels during their trip.

# Edinburgh Visitor Survey Results

## Edinburgh Visitor Survey continued

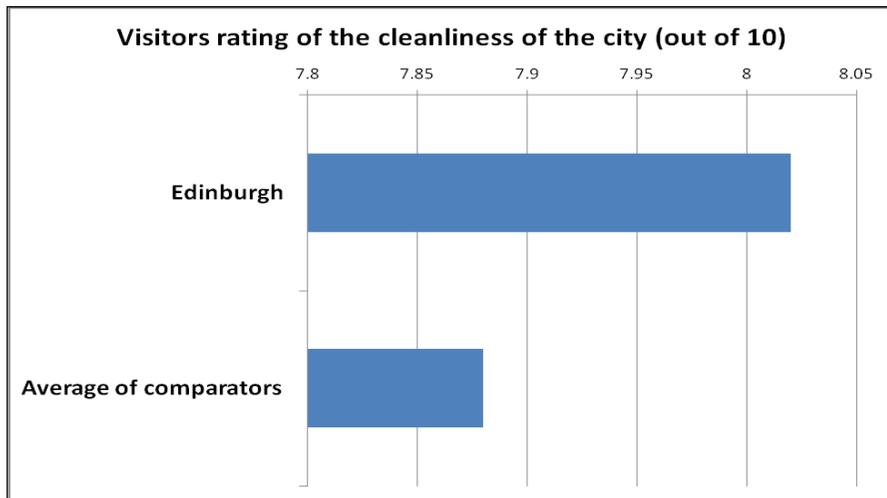
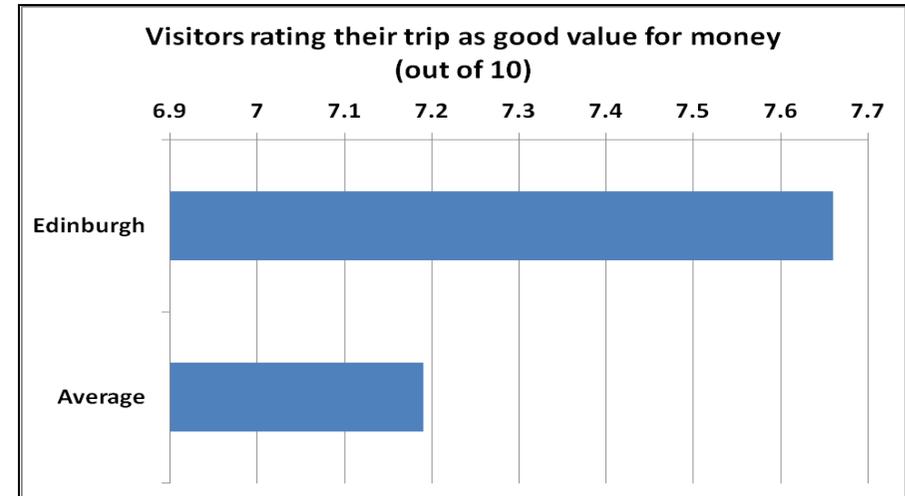
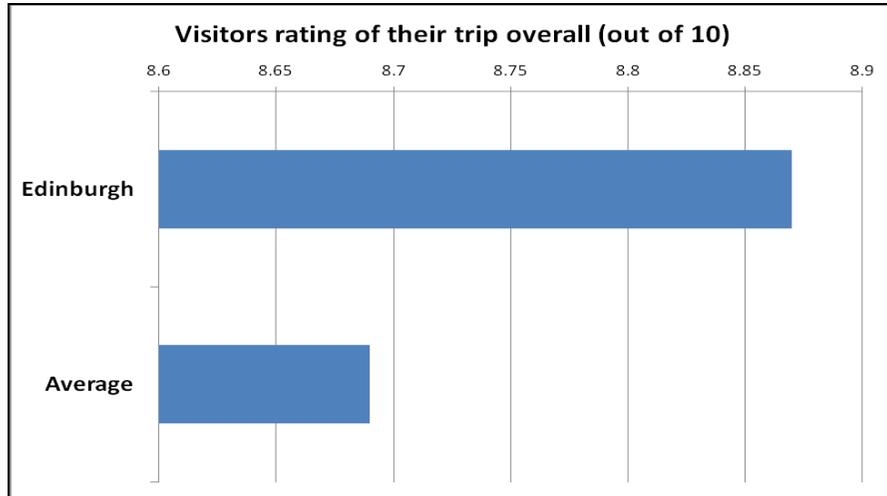


## Commentary



- The most cited reason for visiting Edinburgh is because it is a historic city, 73% of respondents gave this reason.
- The largest age band of visitors to Edinburgh is those aged 25-34 years old. The next largest group is those aged 45-54 years old.
- When visitors arrive in Edinburgh, 40% use free brochures or guides to find out more about the city. Almost a third use information available at their accommodation.

## Benchmarking results



## Commentary

For the period Quarter 1, 2013

- Edinburgh visitors rated their trip to Edinburgh, on average, 8.87 out of 10. This is higher than the average of comparator cities where trips were rated on average 8.69 out of 10.
- In terms of value for money, Edinburgh visitors rated their trip 7.66 out of 10 compared with 7.19 out of ten reported in comparator cities.
- Visitors to Edinburgh also rated it as cleaner than other cities with a score of 8.02 compared with an average of 7.81 in other areas.

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](mailto: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. There were 411 respondents to the Edinburgh Visitor Survey during Quarter 1 2013.
6. Benchmarking information from the Edinburgh Visitor Survey compares responses to visitor surveys in the following locations: Stirling, Chester, Glasgow, York and London.