

# Tourism in Edinburgh Quarter 2, 2013



ESSENTIAL EDINBURGH  
Central Business Improvement District

ETAG  
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Tourism  
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Scottish Enterprise

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# Tourism in Edinburgh

## Quarter 2, 2013 Report

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

As the reporting cycle reaches mid-year and the peak tourist season for the city, the Q2 results are extremely encouraging with positive moves in 9 out of 10 key measures. Particular highlights are:












- Business confidence has seen 3 consecutive periods of growth and is currently at its highest level since Q1 2010
- Hotel occupancy, revenue per available room and achieved daily rates are all ahead of the same period last year, with May in particular coming through more strongly than a year ago
- Overall trip ratings are higher than 5 comparator cities including London on value for money, safety and overall rating.

For information relating to data in the publication please contact: [businessintelligence@edinburgh.gov.uk](mailto:businessintelligence@edinburgh.gov.uk)

For any other information about this report, contact one of the following: [nick.hudson@marketinedinburgh.org](mailto:nick.hudson@marketinedinburgh.org)  
[emily.johnston@essentialedinburgh.co.uk](mailto:emily.johnston@essentialedinburgh.co.uk)  
[admin@etag.org.uk](mailto:admin@etag.org.uk)

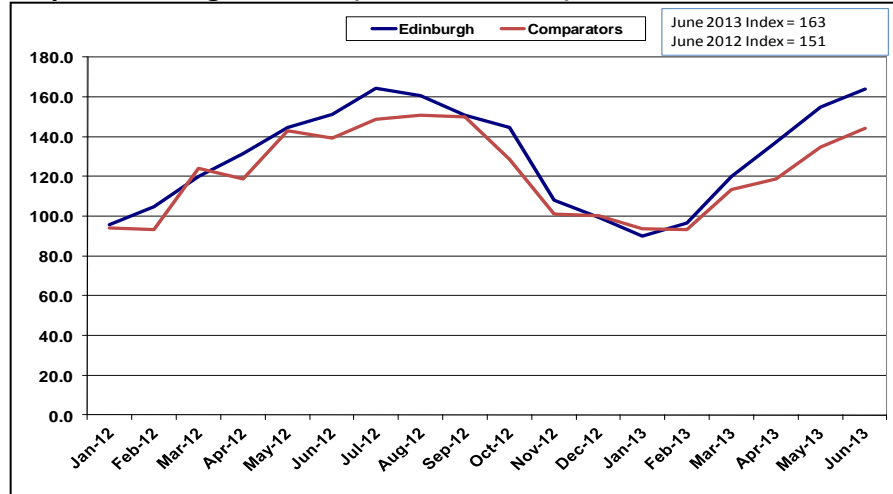
# Tourism in Edinburgh – Highlights

## Quarter 2, 2013

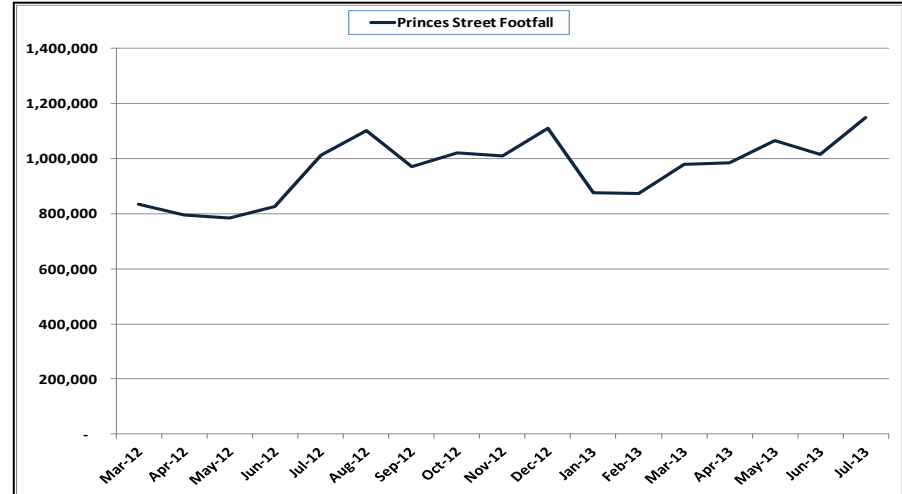
	This period	Last period	Change	Change  	Description
<b>Performance</b>					
-Edinburgh Airport Passenger Index	163.9	151.3	+12.6 % points		Latest monthly comparison with previous year.
- Visitor Attractions Index	153	167	-14 points		Quarterly average compared with same quarter last year.
-Hotel Occupancy	84.9%	83.1%	1.8% points		Quarterly average compared with same quarter last year.
-Achieved Daily Rates	£79.84	£77.68	2.8%		Quarterly average compared with same quarter last year.
-Revenue Per Available Room	£68.27	£64.90	5.2%		Quarterly average compared with same quarter last year.
<b>Outlook</b>					
-Forward hotel bookings	43.8%	40.6%	+3.2 % points		Forward bookings to year end at June 2013 compared with 2012.
-Business Optimism	18.7%	2.0%	+16.7% points		% of respondents optimistic less the % of respondents pessimistic.
<b>Edinburgh Visitor Survey results</b>					
-Visitor Spend	£85.75	£85.25	+0.6%		Quarter 2 2013 compared with quarter 2 2012
<b>Edinburgh Visitor Survey results</b>					
Satisfaction with trip (8+/10)	91.0%	89.5%	+1.5%		Quarter 2 2013 compared with quarter 1 2013

# Visitor Numbers in Edinburgh

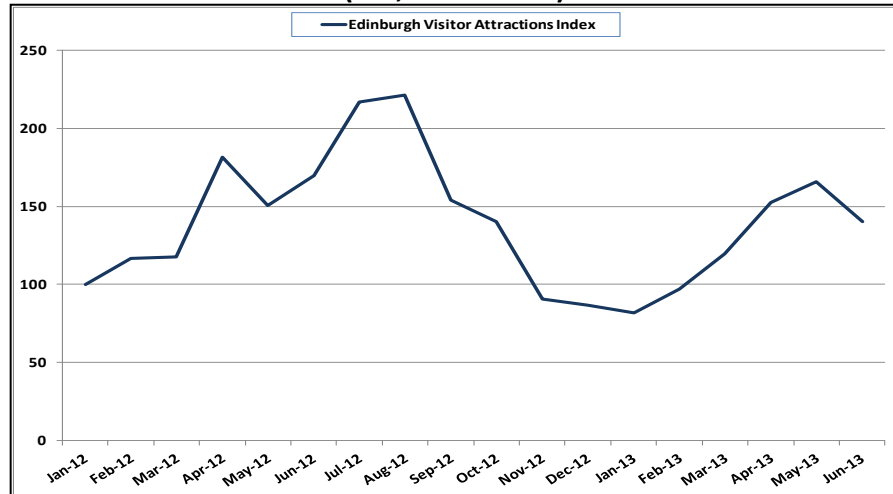
**Airport Passengers Index (Jan, 2011 = 100)**



**Footfall on Princes St**



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

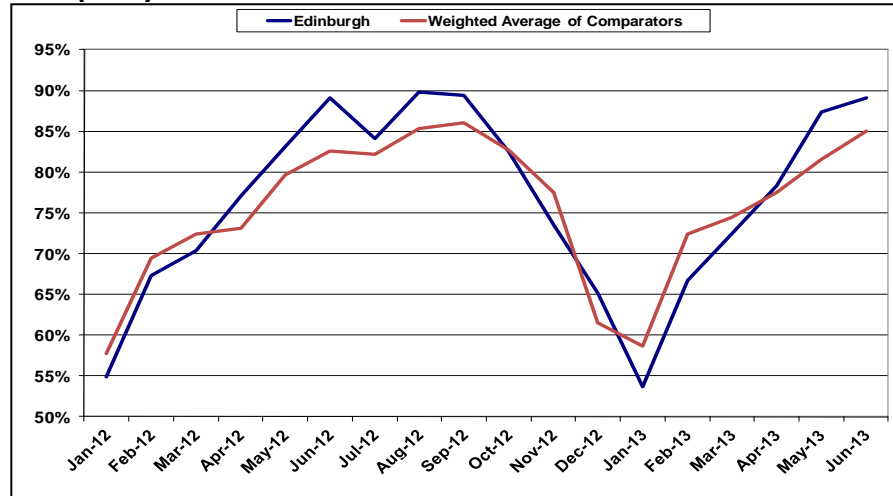


**Commentary**

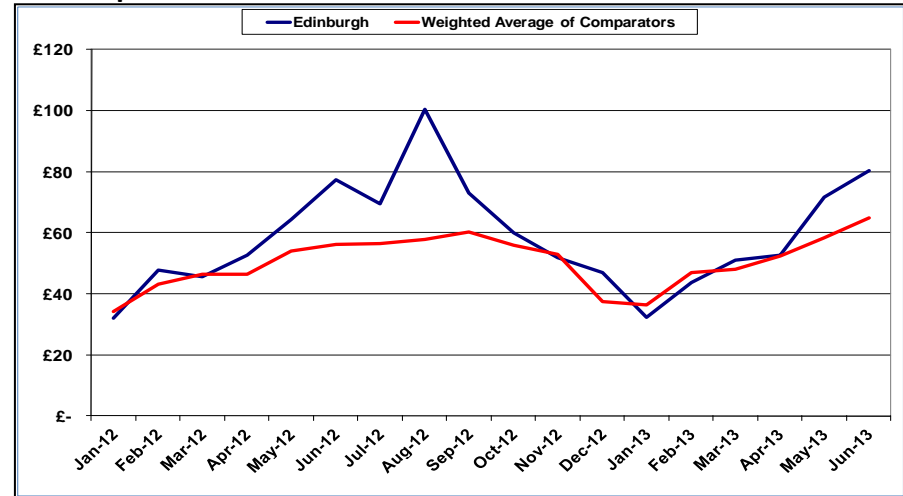
- Airport **passenger numbers** in Q1 & Q2 2013 have increased faster than last year and steadily widened the gap versus the 13 comparator airports (and this is ahead of Edinburgh airport’s first 1m passenger month in July).
- **Footfall** on Princes Street has steadily increased to a new high in July, 15% above last year.
- The steady recovery in the **visitor attractions** index of visitor numbers at 10 major attractions has stalled June to fall to 30 points below a year ago - we’ll review this in the next report.

# Hotels Performance in Edinburgh

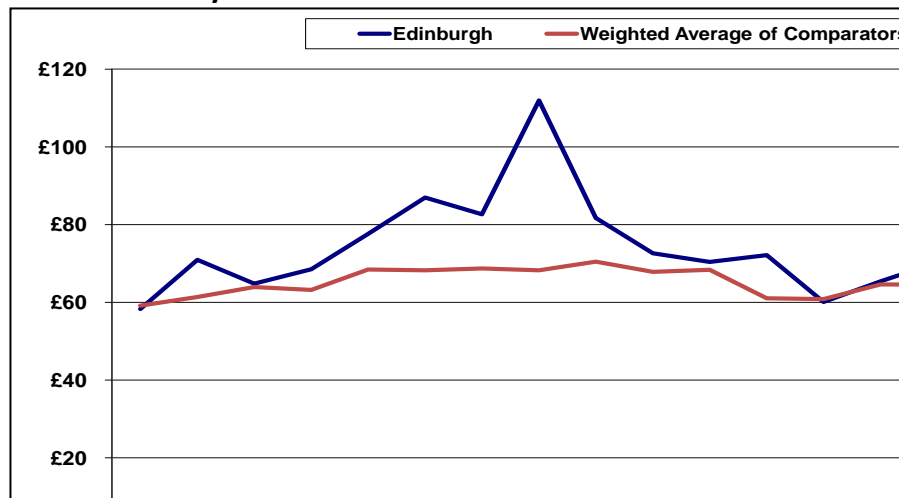
Occupancy



Revenue per available room



Achieved Daily Rate

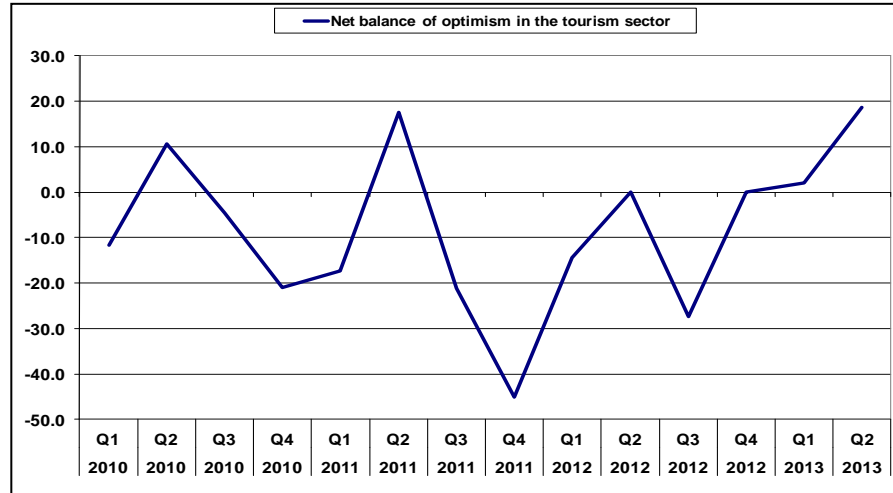


Commentary

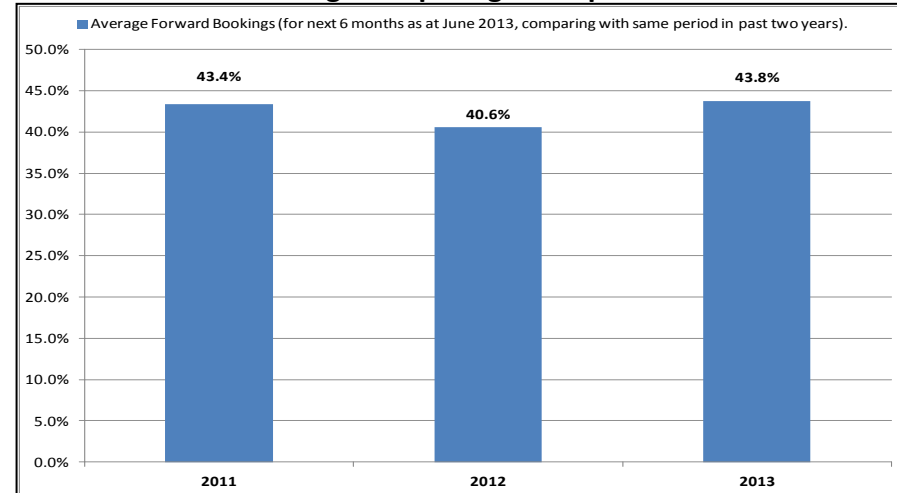
- **Hotel occupancy** has again increased ahead of the 6 comparator cities in Q2 as last year – but with a stronger May. Edinburgh continues to show slightly greater seasonal peaks and troughs.
- Edinburgh's **hotels' revenues** spread across all available rooms, whether occupied or not, is consistently higher than comparators and has again widened the gap in Q2.
- Edinburgh's **achieved daily hotel rates** are again consistently higher than comparators and June is stronger year on year.

# Tourism Outlook in Edinburgh

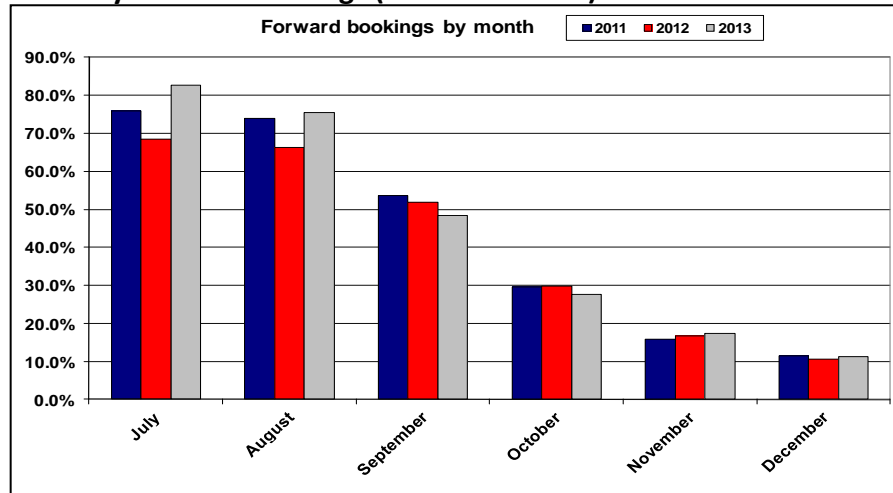
## Business Confidence



## Annual forward bookings comparing same periods



## Monthly forward bookings (as at June 2013)

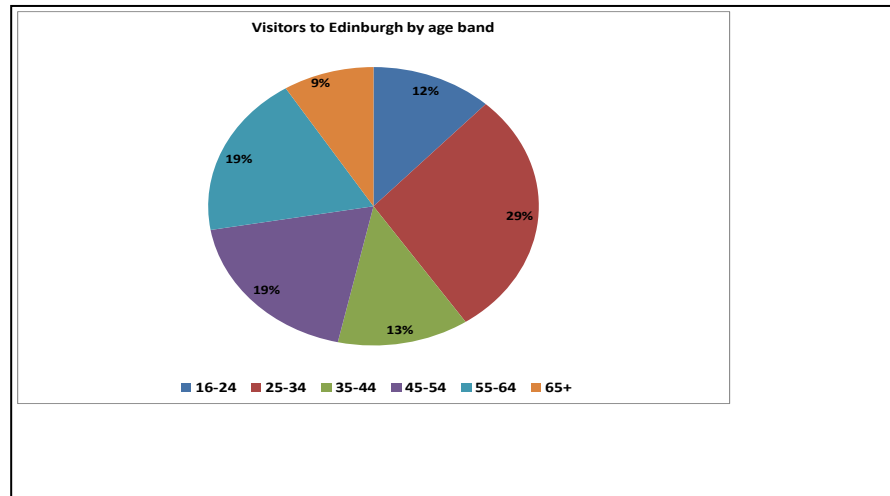


## Commentary

- The net balance of **business confidence** has shown 3 consecutive periods of growth and at 18.7% in Q2 is the highest value for the past three years.
- **Forward bookings** at June 2013 for the next 6 months are up on the previous two years.
- Looking at specific months, forward bookings are ahead in 4 out of 6 of the next 6 months, with September and October slightly down on the previous two years.

# Edinburgh Visitor Survey Results

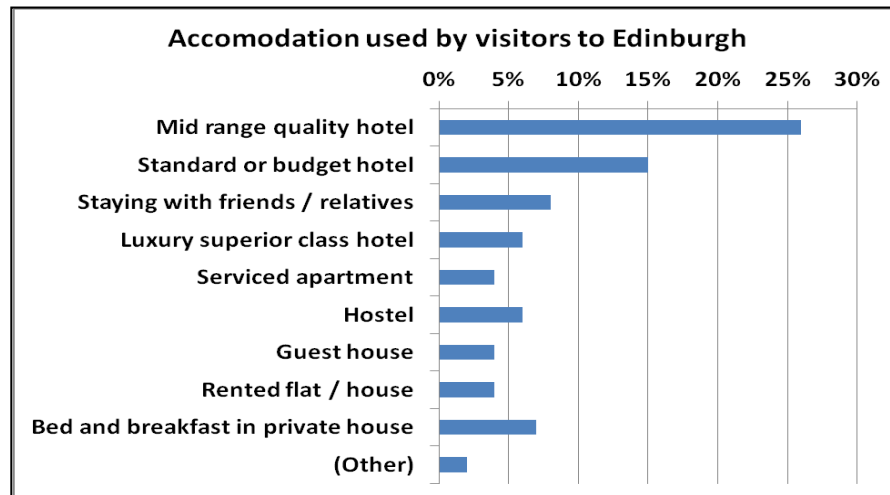
## Visitor Profile



## Visitor Expenditure

Average Expenditure by Visitors	Q2 2012	Q2 2013	Change on last year
Accommodation	£35.91	£ 33.57	-6.5%
Eating/drinking	£20.69	£ 21.92	5.9%
Shopping	£14.97	£ 15.68	4.8%
Entertainment	£9.14	£ 9.75	6.7%
Travel/transport	£4.56	£ 4.84	6.3%
<b>Total</b>	<b>£85.25</b>	<b>£ 85.75</b>	<b>0.6%</b>

## Accommodation Profile

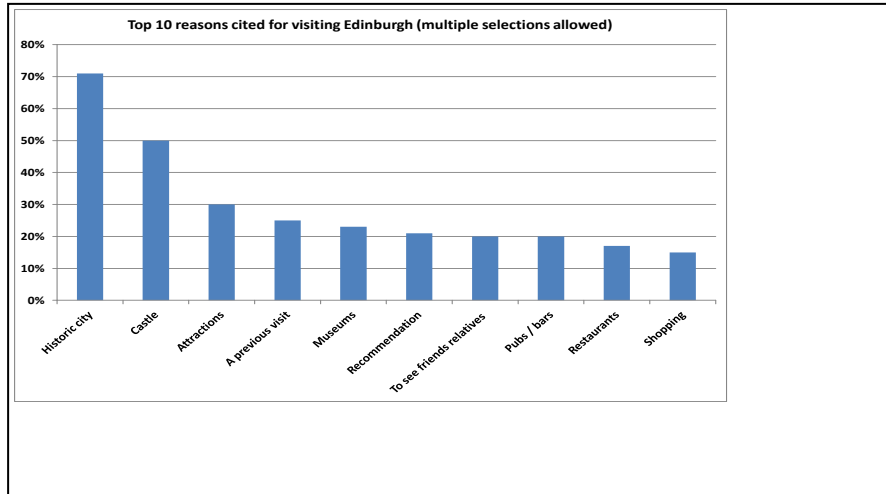


## Commentary

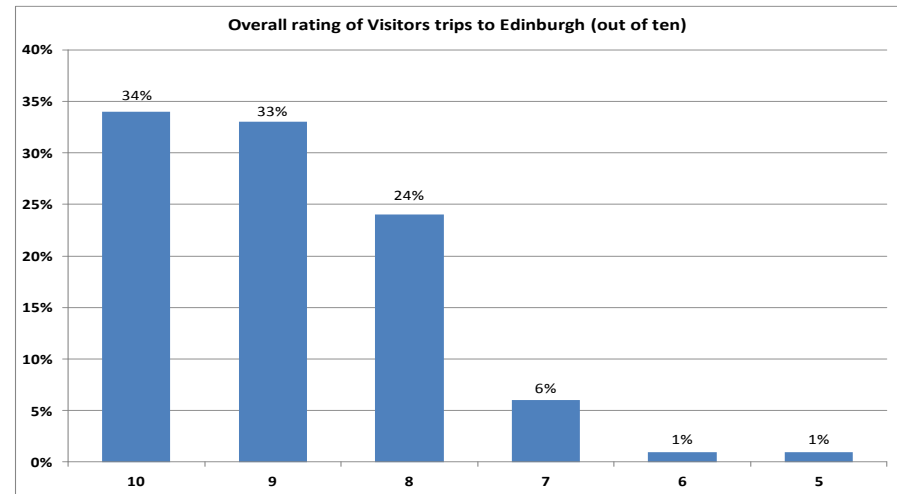
- Edinburgh enjoys a broad **age range** of visitors, with under-35s accounting for 41%.
- **Expenditure** was up in all categories except accommodation, the biggest category of spend at £33.57 per person per night.
- 26% of visitors stayed in mid-range **hotels** during their trip. Less people reported staying in a standard or budget hotel between Q1 and Q2 (down from 18% to 15%) while the proportion that reported staying in a bed and breakfast during same time period increased.

# Edinburgh Visitor Survey Results

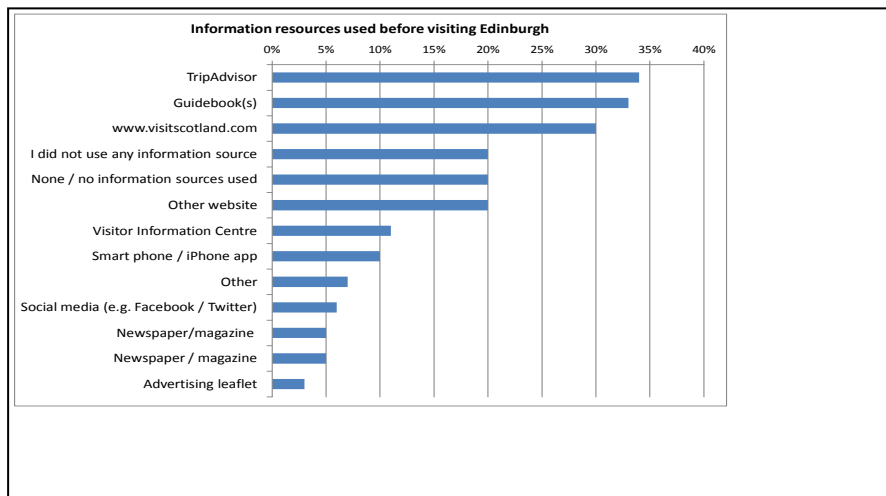
## Reasons tourists visit Edinburgh



## Overall rating



## Information resources

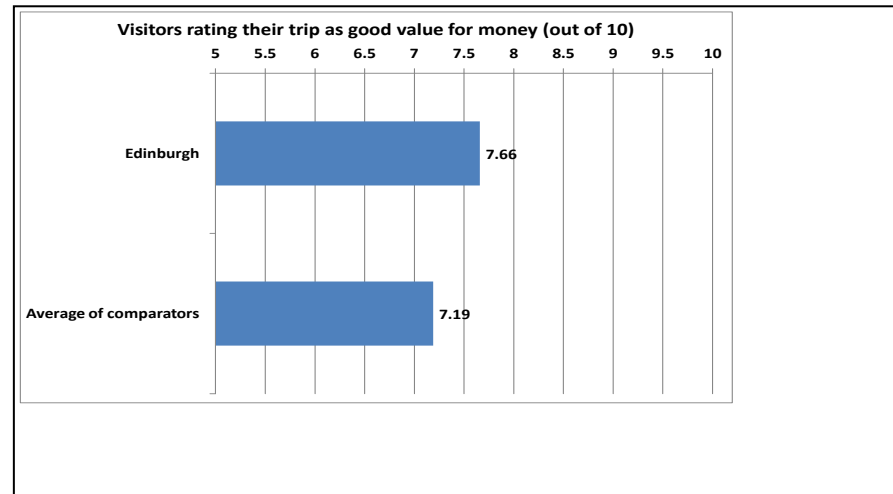
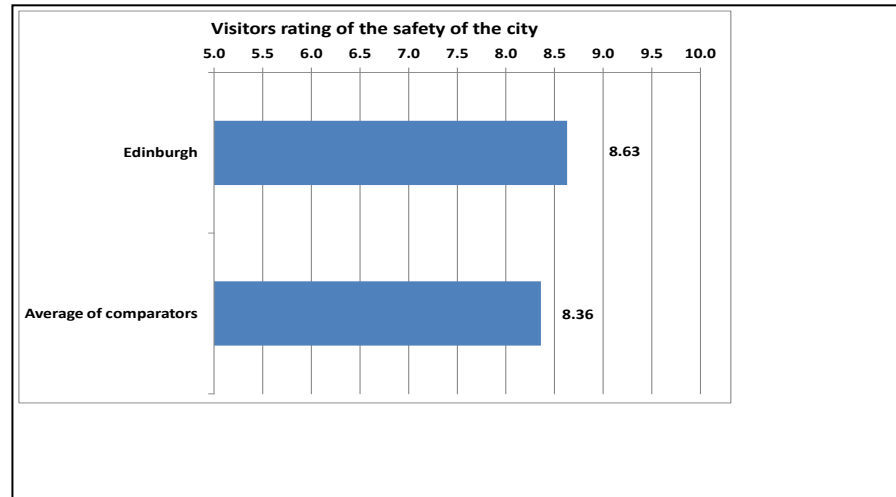
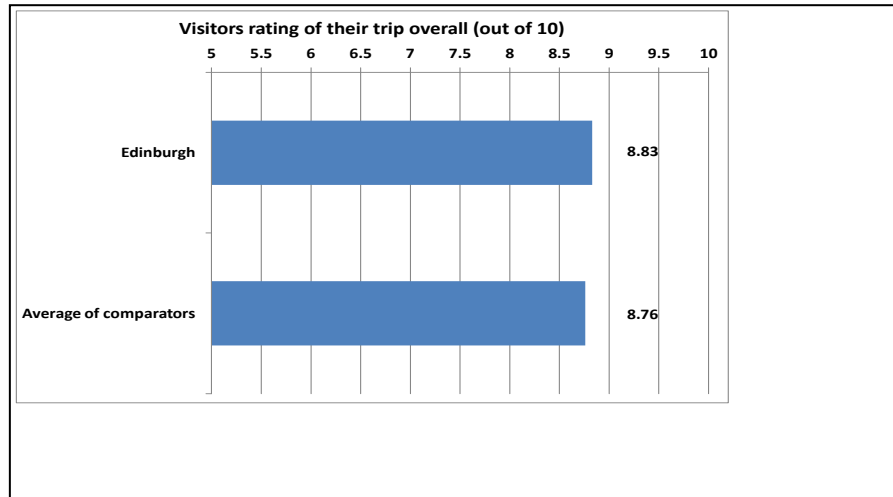


## Commentary

- Edinburgh's position as a historic city and its castle, attractions and museums account for 4 of the top 5 **reasons for visitors to visit**. Shops, pubs/bars and shopping are lower priority drivers.
- **Overall trip ratings** were very high, with 91% of visitors rating their trip 8 or more out of 10 and no visitor scoring it less than 5/10.
- Before visitors arrive in Edinburgh, a third use one or more of TripAdvisor.com, guidebooks or visitScotland.com to **research their trip**. A fifth do not use any information before arriving and 1 in 10 use their mobile (multiple responses are allowed to this question).



# Edinburgh Visitor Survey: Benchmarking results



## Commentary

For the period Quarter 2, 2013

- Edinburgh visitors rated their **overall trip** to Edinburgh higher than 5 comparator cities, including London, on average at 8.83 out of 10.
- In terms of **value for money**, Edinburgh visitors rated their trip 7.66 out of 10, significantly ahead of the 7.19 reported in the same comparator cities.
- Visitors to Edinburgh also rated the city as **safer than other cities** with a score of 8.63 compared with an average of 8.36 for the comparator cities.

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

**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 442 respondents to the Edinburgh Visitor Survey during Quarter 2, 2013.
7. Benchmarking information from the Edinburgh Visitor Survey compares responses to visitor surveys in the following locations: Stirling, Chester, Glasgow, York and London.