

## KEY INDICATORS : EDINBURGH

### 22 : TOURISM

	<i>sources / notes</i>	1991	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	
Tourist bednights	(*1)												
UK visitors									8.29	8.11			<i>million</i>
Overseas visitors		4.5	5.4	5.5	5.8	5.1	4.2	4.2	4.6	4.9			<i>million</i>
Tourist trips	(*2)												
UK visitors									3.15	3.18			<i>million</i>
Overseas visitors		0.78	1.03	1.12	1.16	0.98	0.91	0.85	0.85	0.78			<i>million</i>
Tourist spending	(*3)												
UK visitors									£710	£730			<i>£ million - 03 prices</i>
Overseas visitors			£319	£294	£349	£277	£273	£254	£275	£255			<i>£ million - 03 prices</i>
Hotel room occupancy rates	(*4)		77%	76%	73%	71%	70%	67%	76%				
.. as ratio of Scottish rates			1.24	1.25	1.20	1.20	1.21	1.20	1.27				
Conferences / business tourism													
World ranking as conference centre	(*5)		22	15	14	13	12	15	9				
EICC - no. of events	(*6)			140	162	187	190	164					
EICC - no. of delegates	(*6)			45,000	69,000	60,785	75,502	64,442					
EICC - conference value	(*6)			£11.7	£16.8		£29.0	£36.0					<i>£ million</i>
Edinburgh's UK ranking as a visitor destin.													
.. Guardian / Observer	(*7)					1	1	1	1	1	1		
.. Conde Nast	(*8)							1	1		1		
.. Good Britain Guide	(*9)							1					
International Festival attendance	(*10)						400,817	<400,000	>400,000				
.. value of ticket sales (excl. VAT)				1.87		1.77	2.05	2.00	2.00				<i>£ million</i>
Cruise ships visiting Leith or Forth estuary	(*11)			43	47	52	48	30		40			
No. of nations with consular or other diplomatic representation in Edin.	(*12)			37	35	37	41				33		

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- (\*1) VisitScotland figures, as published in 'Tourism in Edinburgh' and 'Tourism in Scotland' in July each year : [www.lothianexchange.net](http://www.lothianexchange.net) and [www.scotexchange.net](http://www.scotexchange.net) (section on 'know your market'). Note that figures include business as well as leisure tourists. UK figures are derived from the UK Tourism Survey. Because of sample size limitations, the UK figures are the rolling average for a year and the preceding two years. Overseas figures relate to one specific year. Please note that, due to changes in the International Passenger Survey and the UK Tourist Survey, statistics from 2005 onwards are not comparable with previous years.
- (\*2) VisitScotland figures, as published in 'Tourism in Edinburgh' and 'Tourism in Scotland' in July each year; also in the sub-Scotland section of 'Scottish Economic Statistics', published April. Note that figures include business as well as leisure tourists. UK figures are derived from the UK Tourism Survey. Because of sample size limitations, the UK figures are the rolling average for a year and the preceding two years. Overseas figures relate to one specific year. VisitScotland estimates that tourism accounts for 8.0% of all employment in Edinburgh & the Lothians, excluding the self-employed. In Edinburgh itself, tourist-related employment is reckoned to account for about 25,000 jobs, or 8.5% of the total employment. Tourist-related employment is taken as including the following categories in the Standard Industrial Classification : 551-554, 633, 925-927. Please note that, due to changes in the International Passenger Survey and the UK Tourist Survey, statistics from 2005 onwards are not comparable with previous years.
- (\*3) VisitScotland figures, as published in 'Tourism in Edinburgh' and 'Tourism in Scotland' in July each year; also in the sub-Scotland section of 'Scottish Economic Statistics', published April. Note that figures include business as well as leisure tourists. UK figures are derived from the UK Tourism Survey. Because of sample size limitations, the UK figures are the rolling average for a year and the preceding two years. Overseas figures relate to one specific year. N.B. historic expenditure figures have all been adjusted to the latest price base to eradicate the effect of inflation. (Latest 2003 price base). Please note that, due to changes in the International Passenger Survey and the UK Tourist Survey, statistics from 2005 onwards are not comparable with previous years.
- (\*4) Information on hotel accommodation supply is from a comprehensive review conducted for the 'Edinburgh and the Lothians Tourist Accommodation Audit 2005', carried out by Tourism Resources Company on behalf of Scottish Enterprise Edinburgh & Lothians. This identified supply and demand for the full spectrum of serviced and unserviced accommodation in each local authority area in the Lothians. The study was based on accommodation types conforming to the classification adopted by VisitScotland. For the purposes of this table, hotels include the following sub-categories : hotels, small hotels, inns, lodges and restaurants with rooms. They exclude serviced apartments and hostels. The study also attempted to review historic provision, although only very limited information is available on this. Note that the historic figure of 4,500 hotel rooms in Edinburgh relates to 1990 rather than 1991.

The number of Edinburgh hotel rooms registered with VisitScotland increased by 15% between 1998 and 2002, from 6,261 to 7,177. By 2005 this increased to 7,676 rooms.

The Survey Report for the 1965 Edinburgh Development Plan Review estimated that there were 215 hotels in Edinburgh. This is significantly more than there are today, although the average size of hotel in the 1960s would have been much smaller than today.

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- (\*5) Edinburgh & Lothians quarterly hotel occupancy figures from VisitScotland [www.lothianexchange.net](http://www.lothianexchange.net) > Know your market
- (\*6) Annual occupancy figures relate to hotels run by members of the Edinburgh Principal Hotels Association (EPHA). As at 2004 the EPHA had 44 members who contributed to the occupancy survey, with a total of 5,400 rooms. N.B. refers to *room* occupancy rather than *bed* occupancy. Bed occupancy is lower. Information supplied by VisitScotland.
- (\*7) Edinburgh's world ranking out of some 400 cities. International Convention & Congress Association - Association Meetings International (journal). Usually released at end of June. Rankings are based on the number of conferences attended by at least 50 delegates, including only regular annual conferences which are rotated between at least three different countries. Edinburgh climbed rapidly up the rankings between 1996 and 2002, but has since fallen again, not because of any decline in the volume of conferences (indeed these have continued to grow), but because competing cities have 'raised their game', even to the extent of building two or more large-scale conference centres. Edinburgh remains the second most important conference venue in the UK, after London. The Edinburgh Convention Bureau Ltd. aims to re-instate the city in the top 10 in the international rankings in the next few years.
- (\*8) Edinburgh International Conference Centre (EICC), annual report : [www.eicc.co.uk](http://www.eicc.co.uk) Usually published November, with figures relating to the previous calendar year. Note that figures for 1997 relate to the 9 month period April-December only. Subsequent figures are annual figures for January-December.
- (\*9) Guardian / Observer Travel Awards, inaugurated in 1997 : [www.guardian.co.uk](http://www.guardian.co.uk) >Travel >Travel Awards. Rating in terms of "Favourite UK City" to visit, based on an annual poll of readers, with about 20,000 returns. Usually released end of May / June. Glasgow came in 2<sup>nd</sup> position to Edinburgh's 1<sup>st</sup> in 2004, putting the two largest Scottish cities at the head of the table.
- (\*10) Telegraph Travel Awards - 'Best British City' category. Annual awards, announced every October, based on a survey of 25,000 readers of the Daily Telegraph and Sunday Telegraph. Analysed independently by NOP. Survey confined to readers who had been on at least two foreign holidays in the past 12 months and spent more than £500 per person on the holidays. [www.telegraph.co.uk/travel](http://www.telegraph.co.uk/travel)
- (\*11) Condé Nast Traveller Magazine – 'Travel Oscars'. In 2005 Edinburgh was overtaken in the popularity ratings by London (which leapt from 10<sup>th</sup> to 1<sup>st</sup> position) and Glasgow. Leeds and Newcastle took joint 4<sup>th</sup> position, and York came 5<sup>th</sup>. This was only the 2<sup>nd</sup> time in 5 years that Edinburgh has not been at the top of the table. [www.cntraveller.com/ReadersAwards](http://www.cntraveller.com/ReadersAwards)
- (\*12) Good Britain Guide 2001, published November (same publishers as the 'Good Pub Guide' and other travel 'bibles'). Edinburgh identified as the 'best city' in the U.K.
- In 2007 users of the online travel agency Expedia rated Edinburgh as one of the top 10 holiday locations in the world, alongside places such as New York, Sydney, Barcelona and Singapore. Edinburgh was the only British city to feature in the top 10. (Edinburgh Evening News 18<sup>th</sup> April 2007)
- (\*13) Edinburgh International Festival Annual Report : Financial Statements : [www.eif.co.uk](http://www.eif.co.uk) (under the 'about the festival' heading on website) Ticket sales figures are *exclusive of VAT*. Earned income is also derived from sponsorship, donations, publications, interest etc. In addition, about one-third of total funding comes from grants (City of Edinburgh Council, Scottish Arts Council, and Millennium funding). A study in 2000 estimated that the main International Festival generated £23.3 million worth of income for the local economy. If the City's other festivals were counted in, the total economic benefit rose to £125.3 million (i.e. including the Fringe Festival, Edinburgh's Hogmanay, Military Tattoo, Film, Book, Jazz, Science and Children's Festivals).

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A more recent economic impact study calculated that the total number of people attending Edinburgh's Summer Festivals in 2004 was 2.6 million. This generated some £127 million of expenditure for the Edinburgh economy, including pay / income of £31 million. It was estimated that this supported about 2,500 full-time equivalent jobs ([www.lothianexchange.net](http://www.lothianexchange.net), January 2005). A further report published in March 2005 calculated that Edinburgh's 'Winter Feswtivals' (i.e. Capital Christmas & Hogmanay) generated £39 million for the Lothian economy, plus a further £5.4 million for the rest of Scotland. This supported an equivalent 635 full-time jobs in Edinburgh, 92 jobs elsewhere in the Lothians, and 203 elsewhere in Scotland. 54% of visitors to the Hogmanay celebrations and 41% of visitors attending Capital Christmas were found to be from overseas.

Values of individual festivals to the city economy (including indirect benefits) were calculated as follows : Edinburgh International Jazz and Blues Festival £2.9 M ; Edinburgh Military Tattoo £23.3 M ; Edinburgh International Film Festival £2.1 M ; Edinburgh Festival Fringe £69.9 M ; Edinburgh International Book Festival £3.4 M ; Edinburgh International Festival £19.3 M ; Edinburgh Mela £0.8 M ; Festival Cavalcade £3.3 M ; Edinburgh International Television Festival £0.5 M ; Edinburgh International Games Festival £0.9 M ; Edinburgh Storytelling Festival £0.214 M ; Capital Christmas £11.5 M ; Edinburgh's Hogmanay £24.4 M ; Edinburgh's Easter Festival £3.3 M ; Edinburgh International Science Festival £1.2 M ; Ceilidh Culture £0.266 M ; Children's International Theatre Festival £0.29 M. Total economic value to Edinburgh : £167.9 M. In total, the 17 events attracted an attendance of 3.2 million people.

A sample survey of International Festival audiences carried out in 2001 identified that 33% came from Edinburgh, 5% from the rest of the Lothians, 19% from the rest of Scotland, 25% from the rest of the U.K., and 18% from overseas. 67% of visitors said the Festival was their only reason for coming to Edinburgh, while a further 22% said it was a very important reason. The EIF's 2003 Annual Review reported that 26% of visitors came from the rest of the UK outside Scotland, and 14% from overseas.

- (\*14) The Edinburgh Festival Fringe is officially regarded as the largest arts festival in the world (Guinness Book of Records). Ticket sales for the 'Fringe' broke the 1 million threshold for the first time in 2003, with over 1.2 million seats sold. 44% of tickets were sold to people living in Edinburgh. The 2005 Fringe hosted 26,995 performances of 1,799 shows in 247 venues, and provided a stage for 16,190 performers (cf. 2004 : 25,236 performances, 1,695 shows, 236 venues). Over one-third of all shows in 2005 were world premieres. Ticket sales in 2005 were valued at £11,640,000 (cf. £7,688,113 in 2002). [www.edfringe.com](http://www.edfringe.com) Ticket sales and box office receipts figures for 2002 to 2005 were summarised in an article in the 'Edinburgh Evening News', 29<sup>th</sup> August 2006.

A study published in April 2007 (by Progressive consultants) found that the 2006 Edinburgh Military Tattoo brought in £49M of spending to Edinburgh and £86M to Scotland as a whole. This considerably exceeded the figures from an earlier study, carried out in 2004, when the Tattoo was estimated to generate £23M for the Edinburgh economy. Around 83% of the 217,000 visitors to the 2006 Tattoo were from outwith Edinburgh & the Lothians. Visitors from outwith Scotland spent an average of £268 in connection with the Tattoo, comprising £28 on tickets and programme, £100 on accommodation, £70 on food & drink, £40 on shopping and £30 on local transport.

The Edinburgh Book Festival notched up an attendance of more than 220,000 in 2005 - compared with 200,000 in 2004 and 180,000 in 2003.

Apart from the festivals, other regular events also attract large numbers of visitors to Edinburgh and support the local economy. For example the Royal Highland Show, Scotland's premier agricultural show, draws large crowds to the showground at Ingliston in June every year. In 2005 visitor numbers were reported as 150,000 - an increase on recent years.

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- (\*15) The Royal Highland Show is one of the UK's premier agricultural shows, and Scotland's leading outdoor event. It is held over 4 days every June, at the three hundred acre Royal Highland Showground at Ingliston. (Note, however, that the 2001 Show was cancelled due to Foot & Mouth Disease.) Attendance figures are from press releases by the Royal Highland & Agricultural Society of Scotland (RHASS). [www.rhass.org.uk/public/news/](http://www.rhass.org.uk/public/news/) The 2006 figure was reported to be the second highest recorded in the Show's 166 year history. At some point over the next decade the RHASS and Royal Highland Show are likely to relocate to a new showground at Norton Park, just across the A8 from the existing Ingliston site, to make room for the proposed expansion of Edinburgh Airport.
- (\*16) Various press reports and Forth Ports plc : [www.forthports.co.uk](http://www.forthports.co.uk) ; 2004 figure relates to Leith and Rosyth combined, and is quoted in "Review of First Impressions of Scotland- Report to Ministers".
- (\*17) Various press reports 1997 to 2000. Information for 2004 is from the Scottish Executive website : [www.scotland.gov.uk](http://www.scotland.gov.uk) >Topics > Government >International relations >Consulate Missions in Scotland > Consular Corps Addresses. In 2004 there were 45 countries with consular representation in Scotland, and 33 of these were based in Edinburgh : Australia, Austria, Bangladesh, Brazil, Canada, China (x), Czech Republic (x), Denmark, France (x), Germany (x), Greece, Hungary, Iceland, India (x), Ireland (x), Italy (x), Japan (x), Jordan, Kyrgyzstan, Luxembourg, Malta, Monaco, Netherlands, Norway (x), Phillipines, Poland (x), Russian Federation (x), Slovenia, Spain (x), Sweden (x), Turkey, Ukraine (x) and U.S.A. (x). (n.b. countries marked with an (x) were represented by career diplomats; others were represented by honorary consuls - mostly business people)