

# Edinburgh 2030 Tourism Strategy : Phase 3 DRAFT STRATEGY

## *FRONT COVER*

Important: This document has been provided in an accessible format. The publicly-available, designed version released for public consultation is available [here](#).

This document is the first draft of the Edinburgh 2030 Tourism Strategy. It has been prepared on behalf of the Edinburgh Tourism Strategy Implementation Group for the purpose of public consultation during the period November-December 2019.

Your views on this draft strategy are welcome; please provide your feedback by answering the questions on the form provided. Once feedback from the consultation has been received, the strategy will be finalised and published in early 2020.

For more information about the strategy's development, please visit:

<https://www.etag.org.uk/edinburgh-2020/developing-the-edinburgh-2030-strategy/>

## How to read this strategy

This document sets out the key themes, ambitions and principal recommendations for Edinburgh’s tourism development for the decade to 2030. It starts by putting Edinburgh’s tourism development in context; in terms of the shifts and pressures in urban tourism around the world, as well as in terms of the city’s expected urban growth in the coming years. Following this, it presents five priority areas for action which are designed to help the business of tourism to meet the city’s long-term ambitions, in terms of inclusive, sustainable economic growth.

## Who is this strategy for?

This strategy is intended to be read and shared by as wide an audience as possible. As Scotland’s national tourism strategy makes clear, “tourism is everyone’s business”, and that is certainly the case in Edinburgh. The strategy is intended to provide strategic guidance to all individuals and organisations that have a stake in the city’s success as a place to live, work and visit.

Tourism is playing an increasingly important role in the city’s economy. In addition to the benefits that tourism brings to the city, we recognise that it can occasionally pose challenges for the city too. For this reason, it is important that all stakeholders have a clear sense of purpose and direction in how to go about capitalising on these benefits and on addressing these challenges.

## How was this strategy developed?

Commissioned by the Edinburgh Tourism Strategy Implementation Group, this strategy was developed in three phases during the period 2018-2020, involving multiple stakeholders from around the city, as well as a panel of international experts who are sharing their knowledge and experience to inform each stage of the strategy's development.

**Phase 1** (November 2018 – May 2019): Evidence Review and Analysis; a study of 200+ resources evaluating tourism growth in the context of the city's broader urban development. This study is presented in a report, [Setting the Scene](#).

**Phase 2** (March 2019 – July 2019): Industry & Stakeholder Consultations with over 200 individuals through stakeholder groups and 1:1 meetings. Stakeholders included tourism businesses in the city, officers and elected members of the City of Edinburgh Council, business associations, public sector agencies, and conservation groups. The findings were summarised in this [report](#).

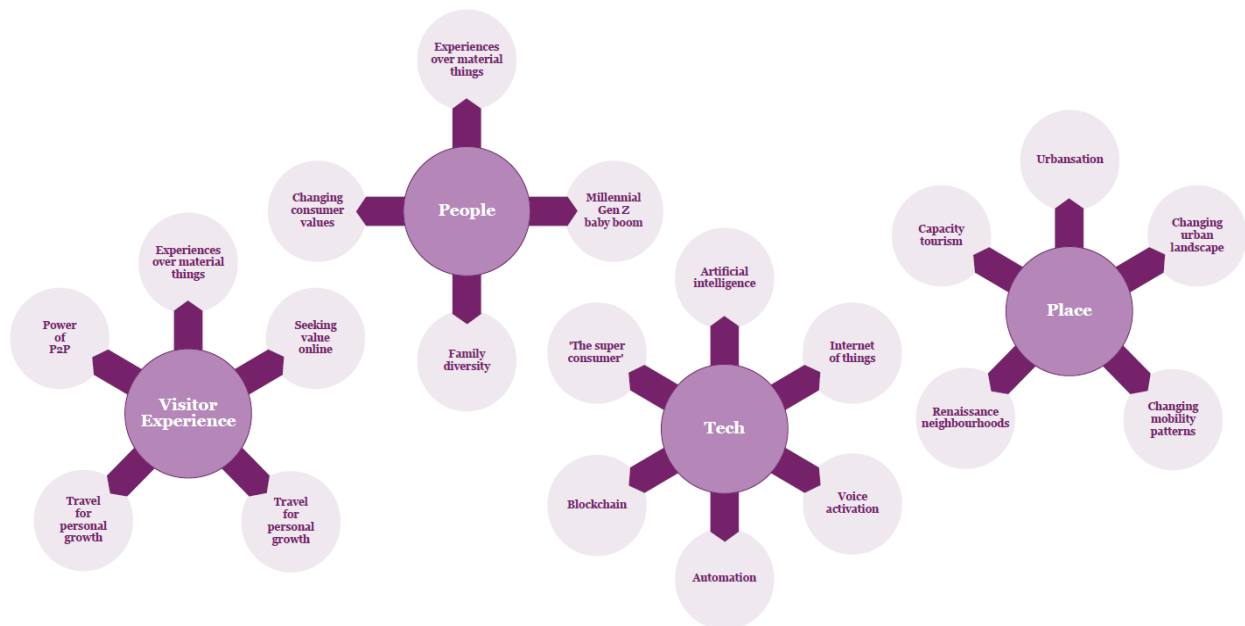
**Phase 3** (August 2019 – February 2020): Strategy development. As the strategy is being drafted, it will be tested, reviewed and refined through multiple stages. The public consultation exercise is a key element of the process, providing Edinburgh's residents, businesses and tourism stakeholders with the opportunity to make their views known during November and December 2019 via the City of Edinburgh Council's [Consultation Hub](#). Once the consultation process is complete, the final draft strategy will be prepared for endorsement by key partners before the strategy is finalised and launched in February 2020.

## Tourism in a changing world

Edinburgh is known for many things; its landmarks and outstanding heritage, its dramatic topography, its iconic status as a hub of political power, commerce and culture and as the world's leading festival city. It's also the birthplace of great ideas that have helped transform the world through scientific progress, technological innovation and creative imagination. All of these things help to make Edinburgh a fine place to live, work, invest, study, and of course to visit.

### Global context: megatrends shaping tourism demand

Of course, the city of Edinburgh doesn't exist in a bubble. Trends and patterns of consumer behaviour sparked thousands of miles away can quickly start to shape the city in a multitude of ways. The following image outlines some of the main trends that are expected to influence demand for tourism in Edinburgh in the coming years:



### A defining trend: tourism growth

During the lifetime of the previous *Edinburgh 2020 Tourism Strategy*, the city's popularity as a destination has rapidly gathered pace, with substantial increases in the number of domestic and international visitors whose spending in the city has helped to create thousands of additional jobs. These increases reflect a global trend; as travel becomes more affordable and attractive to greater sectors of the world's population, tourism is on the rise, and growth is expected to continue in the coming years.

However, as visitor arrivals increase, destinations around the world are asking searching questions: Is this growth sustainable for the environment and our

communities? Is tourism working well for the city as a whole? Are our visitors getting the best possible experience that we can offer? How can we do better?

In Edinburgh, just as elsewhere, it's time to go further and ask more of the visitor economy; to reduce its burden on the environment, to contribute more to residents' quality of life, to exceed the expectations of our visitors and leave a lasting legacy of a better city for all.

## Tourism in a changing city

*'Edinburgh is many different things to different people, but it is primarily a home; a home to nearly half a million people, and like cities around the world, it is growing'*

Edinburgh is many different things to different people, but it is primarily a home; a home just over half a million people, and like cities around the world, it is growing. Over the past decade Edinburgh's population has increased by 12% and by 2041 it is forecasted to grow to over 600,000. While it is good news for the economy that so many are choosing Edinburgh as a place to live and work, this increase will place new demands on the city to provide energy, jobs, affordable housing and transport.

It is important to think about tourism in Edinburgh in this context too; visitors and residents are increasingly sharing the same spaces, using the same resources (such as water and energy) and modes of transport and spending their leisure time in similar ways. We also know that visitors increasingly want to experience the local way of life. As a result, in the future there will be an even greater need to manage tourism, recognising the rights of local residents to live in a city that works well, offers a good standard of living and retains its authentic character.

### Tourism in: a place we call home

What makes Edinburgh so special? There are so many aspects of Edinburgh's character that attract visitors to come and discover the city, but first and foremost it's our stunning heritage, located primarily in the Old and New Town (and recognised as a UNESCO World Heritage Site since 1995). Of course, the Old and New Towns aren't just an attraction in their own right; they are home to thousands of residents, the principal backdrop to Edinburgh's festivals and host to a wide range of shops, pubs, restaurants and visitor attractions.

In the coming years, protecting and enhancing the city's built heritage will be of central importance to ensuring that residents and visitors for generations to come can enjoy Edinburgh in all its glory. This will mean not only taking care of buildings, but in ensuring a pleasant urban environment by enhancing our public spaces, improving

pedestrian flows and tackling any tourism-related issues that negatively affect residents' quality of life.

## Tourism: an economic success story

Tourism is one of the city's biggest success stories, attracting 4.3 million visits a year, who spend around £4 million in the city each day. The sector directly employs over 33,000 of the city's 513,000 residents creating opportunities for residents from across our communities, upskilling our workforce and attracting talent from all over the world. It also has many indirect benefits through the wide and varied supply chain across Scotland that services the tourism sector here in the city. For the continued economic success of the city, it is important that the city is home to a successful, sustainable tourism sector.

## Tourism in the city and beyond

Big things are coming to Edinburgh. Within a few years, the St James Quarter is due for completion, adding to a more extensive City Centre Transformation Project that will see major changes in the way that people experience and move around the city. Further afield Edinburgh's Waterfront, Haymarket and the Forth Bridges Area are just a few of the areas within the city region that are undergoing development for the future enjoyment of residents and visitors. Making these areas destinations in their own right, and connecting them in a coherent, user-friendly way will be essential if we are to spread the impact of tourism further. It is also time to capitalise on Edinburgh's status as a gateway city to the rest of Scotland in a way that brings benefits to the city and other destinations in the country too.

## Tourism for all seasons

Spreading the impact of tourism more evenly requires us to think more broadly about who is visiting Edinburgh, and at what time of year. Despite significant increases in visitors to the city in recent years, seasonality is still an issue, affecting patterns of demand, business viability and employment. Here, both leisure and business events have a key role to play in attracting high-value visitors to the city during quieter periods.

## Tourism in a living, breathing city

Tackling climate change is the greatest challenge of our age and is essential for safeguarding the health and wellbeing of current and future generations, as well as the sustainable prosperity of Edinburgh as a whole. In 2019 the city declared a 'climate emergency' and has set ambitious targets for reducing carbon emissions to zero by 2030. As a major pillar of the city's economy and a significant consumer of energy and

producer of carbon emissions, Edinburgh's tourism sector has a vital role to play in helping the city to meet this target. In fact, we believe that Edinburgh has the opportunity to lead the way in showing how a city can help its businesses, residents and visitors to make healthier, more climate-friendly choices.

## Tourism that works for all

In recent years, Edinburgh has become an attractive place for businesses to invest, for skilled individuals to come and work and of course, for visitors. Yet deep-seated challenges remain, especially when it comes to ensuring that all residents can participate in the city's economic success. As tourism grows it will be important to help tackle inequality by ensuring that the people of Edinburgh have increased access to fair, consistent work with good prospects for career advancement. It will also become even more important to ensure that Edinburgh's residents feel part of their community and that they can enjoy the broad cultural offer that tourism helps to support.

## Tourism in a city that we can be proud of

Scotland's capital plays a vitally important role for tourism in the Edinburgh City Region and the country beyond. Edinburgh's future success depends on it having a strong reputation on the global stage as an open, welcoming city where tourism is supported by residents, and the visitor economy makes a strong contribution to the city's broader goals. Through implementing this strategy, we want to lead the way in showing that this really can be achieved, by nurturing a city and a model for urban tourism that we can be proud of.



## From driving growth to managing growth

*“It’s time to adapt our approach by working to make tourism work better for the city”*

Long-term projections show that tourism demand in Edinburgh will increase. Our tourism supply is growing too; hotels are under construction; Edinburgh Airport is growing, the festivals are increasingly popular and developments such as the St James Quarter and Edinburgh’s Waterfront will create new reasons to visit the city. Like its peers the city has traditionally focussed on driving tourism growth, however in light of what we know about tourism in a growing city, it’s time to adapt our approach by working to make this growth work better for the city. It’s also time to recognise that some forms of tourism activity pose more challenges to the city than others, and that in the interests of all, there may be some difficult decisions to be made in the future.

In today’s world, change is the only thing of which we can be certain. Political turbulence, technological advances, the shifting sands of consumer values and the growing evidence of changes in the environment; these make for a complex setting for a 10-year strategy. As a result, this document has been designed to set out framework of guiding principles and headline recommendations rather than specific actions (these will follow in subsequent stages). This way, the strategy ensures that whatever the future holds, stakeholders can target their efforts towards achieving the best outcome for the city and its people. Our guiding principle should always be to ask: “how can we improve the quality of life for residents and contribute to the city’s broader economic goals?”

## Helping to meet the city's long-term ambitions

Our starting point is to address the following three questions:

1. What can tourism do for the city?
2. Where can the public and private sectors work together to target their efforts and make a difference, contributing to residents' quality of life, the visitor experience and the economic vitality of the city?
3. How can we continually improve our approach to optimize the benefits that tourism brings to the city, and to reduce its negative impacts?

The Edinburgh Economy Strategy (June 2018) provides the appropriate framework for defining our goals in the years to come. It identifies the 'Eight Enablers of Good Growth':

*Designer - please recreate this infographic (found on p.35 of the Economy Strategy), according to the brand/template of this strategy)*



Through this strategy we aim to address every one of these enablers and set out a path for the city's tourism stakeholders to follow so that together, they can enable good growth.

# The five priorities for action...

*Towards 2030 we will nurture and develop...*

- Our place
- Our people
- Our environment
- Our partnerships
- Our reputation

In the following section we explain how Edinburgh's tourism stakeholders should target their efforts in order to address these five priority areas, by addressing the following questions:

- How does it help to meet the city's broader goals?
- What is the ambition?
- What are the principal recommendations?
- What are the key indicators for success?

## We will nurture and develop our place

**The ultimate goal:** Edinburgh should be nurtured and developed as an excellent *place* to live and work, in doing so, this will help to make it a great place to *visit*.

Developing attractive places and spaces in and around Edinburgh means preserving and nurturing its outstanding world heritage and improving existing public spaces in the centre, while identifying, developing and connecting less visited parts of the city where both residents and visitors will want to spend time.

### **Our ambitions:**

- Edinburgh's heritage is cherished and cared for as a fundamental aspect of the city's character.
- Edinburgh retains its authenticity as a "living, working" city with a reasonable balance between tourism and other aspects of economic activity
- New tourism developments in the city will contribute to the quality of life for local people
- Edinburgh is able to increase its appeal both to residents as new developments in neighbourhoods and outlying areas in the City Region are developed and easy to reach by public transport

## Place: Principal Recommendations

The tourism sector should take a more active role in the development and delivery of the UNESCO World Heritage Site Management Plan in partnership with the relevant agencies in the city.

Tourism demand and visitor behaviour should be taken into account in major city projects, in order to fully understand and plan for the impacts that they will generate.

Research should be carried out to identify which spaces are liable to crowding and these should be prioritised for enhanced management

The city's existing regulations surrounding place management and property uses i.e. short-term lets should be enforced and upgraded where necessary, in order to improve the quality of life and visitor experience

Technology and data driven solutions should be introduced to improve visitor capacity management in public spaces, visitor attractions and during peak periods.

Building use should be monitored, and where appropriate, measures taken to seek a balance of uses that respond to the needs of the city

Extending tourism's footprint into local neighbourhoods should be aligned with the City of Edinburgh Council's Locality Improvement Plans (LIPs).

Edinburgh should work to improve connectivity to and around the city, including seamless, integrated transport solutions and the development of online and physical wayfinding infrastructure.

### Potential indicators for success:

- The level of support for tourism by local residents
- The level of visitor satisfaction on the visitor experience
- Comments and complaints received around issues such as property use and public realm
- Size of the long-term resident population within popular areas for visitors
- Level of visitor spending per locality

# We will nurture and develop our people

**The ultimate goal:** The principal beneficiaries of this strategy should be Edinburgh's people. Tourism should directly contribute to the quality of life in the city, with the city's residents enjoying the benefits that a well-managed, responsible and thriving tourism sector generates. Nurturing people also means nurturing our visitors, ensuring that they receive a warm welcome and a fantastic experience as guests in the city. by giving them outstanding, educational and enriching experiences, and encouraging them to care for the city.

## **Our ambitions:**

- Edinburgh's tourism sector will directly contribute to the quality of life for Edinburgh's residents via improved places, enhanced facilities, enriching cultural and educational experiences, access to fair and rewarding job opportunities and an environment that inspires and supports entrepreneurs
- The tourism workforce in Edinburgh is well trained and flexible to adapt to future demands of the workplace. Employees are led by motivated, inspiring leaders who are innovative and lead successful businesses
- Residents and visitors take pride in the city and respect the environment those who call the city home
- Tourism developments in the city's neighbourhoods results in stronger communities and better services for local residents

**People:  
Principal recommendations**

Residents should be consulted on tourism-related developments, for example, when LIPs are prepared, or when certain specific developments are proposed

Monitor resident sentiment surrounding tourism in a consistent and sustained manner in order to inform tourism-related planning and decision making.

Encourage and facilitate local residents to engage and participate in cultural activities including events, festivals and visitation at museums and galleries

Communicate with residents and visitors in order to identify and tackle nuisance issues. This should involve relevant tourism suppliers (e.g. hotels, tour guides)

Work to ensure that Edinburgh's tourism sector is delivering fair, inclusive and rewarding jobs for those who are employed in the sector

Ensure that business leaders have the right skills to operate responsible and efficient tourism businesses

Help businesses to stay up to date with regulations that relate to workforce management (e.g. related to migration, work permits, health and safety)

Assist businesses in planning and preparing for long-term changes in skills requirements (such as automation, digitalisation)

Ensure that Edinburgh's tourism workforce has the right skills (especially digital) to ensure that they meet the needs consumers' evolving needs

**Potential indicators for success:**

- Percentage of tourism suppliers paying the living wage
- Number of jobs created with fair work conditions
- Employee satisfaction levels
- Participation of residents from lower-income backgrounds in cultural events and attractions
- Comments and complaints received on tourism-related issues



# We will nurture and develop our environment

## **The ultimate goal:**

Edinburgh's tourism sector should lead the way as an exemplar in achieving environmentally sustainable urban tourism. Guided by the city's commitment to achieve net-zero carbon emissions by 2030, all tourism stakeholders will be actively engaged in helping the city to meet this target. By adapting to and capitalising on major city developments such as the City Centre Transformation as well as the city's unique landscape and green spaces, Edinburgh will help its visitors and businesses to make healthy and environmentally sustainable choices.

## **Our ambitions:**

- Tourism will proactively contribute to Edinburgh achieving the goal of zero net carbon emissions by 2030 (with a hard deadline of 2037)
- Visitors will make more environmentally sustainable choices throughout their visit to the city
- Edinburgh's tourism businesses will embrace carbon emission and waste reduction as a source of competitive advantage

**Environment:  
Principal recommendations**

. Establish a tourism sector-specific programme -aligned with the City of Edinburgh Council's plans- to help contribute to the city's ambition to adapt to a low carbon future

Edinburgh's tourism sector should seek to measure its overall "invisible burden" and put in place plans to mitigate this wherever possible.

Edinburgh's tourism sector should actively explore opportunities to minimise waste and optimise use of existing resources through developments in the circular economy

New developments and re-developments of existing sites should adhere to the highest standards in environmentally sustainable practices in terms of building design, energy use, waste management etc.

A proactive and ongoing communication plan should be put in place to help visitors make informed choices that will help them reduce the environmental impact of their visit

Tourism sector stakeholders should work together to co-design enhanced solutions for reducing traffic related impacts generated through the servicing of the tourism sector.

**Potential indicators for success:**

- Volume of carbon emissions related to tourism activity in Edinburgh
- Volume of waste produced by tourism businesses
- Tourism-related traffic (in particular private-hire coaches) in the city centre
- Number of tourism-related developments that adhere to high environmental standards
- Visitor satisfaction with parks, gardens and green spaces

## We will nurture and develop our partnerships

**The ultimate goal:** Developing and nurturing strong partnerships at all levels is the key to ensuring that tourism in Edinburgh is able to effectively contribute towards the city’s long-term ambitions, as defined through the *Eight Enablers of Good Growth* (see page 9). The city’s own tourism leadership, governance and delivery should be based on a strong network of partnerships, and it should support Edinburgh’s business community in growing and innovating together in order to develop outstanding products and services. Nurturing partnerships will also help the city take more consistent, consensual decisions on tourism development, as well as being flexible in adapting to changing conditions in the future.

### Our ambitions:

- Stronger partnerships should help the city’s tourism stakeholders to become proactive in place management, secure more sustainable investment for achieving the goals of this strategy and ensure that the city is resilient
- Create the right conditions for a thriving, responsible, sustainable tourism sector
- The existing ‘Team Edinburgh’ approach to tourism leadership, governance and delivery continues to be developed, creating a well-integrated and highly responsive partnership approach to working in the city
- Edinburgh is an active partner in the wider Scottish tourism community, optimising its status as a gateway destination for the benefit of the city and other destinations in the country

### Partnerships: Principal recommendations

The structure, funding and organisational model for tourism leadership, governance and delivery in Edinburgh should be based around the requirements of this strategy

In order to manage tourism growth in a growing city, decision-making and implementation should become more closely integrated, with clear lines of responsibility and accountability between the constituent stakeholders – including residents

A dedicated multi-stakeholder group should be established to oversee the implementation of the recommendations on investments and monitor the effect/impact of the proposed Tourism Visitor Levy (TVL) on the local economy

Funds that are invested from the proposed TVL revenue should be transformative and directly relate to the ambitions set out in this strategy with a view to achieving clear outcomes and visible success for the city that benefit both residents and visitors

Work in partnership to ensure the right conditions for a thriving, responsible, sustainable economy

Support tourism businesses to drive innovation in product development to improve visitor experiences, improve productivity to enhance business viability, and provide market intelligence and insights on the evolving business landscape

Partners should actively work together encourage year-round tourism, recognising the need to offer new reasons to visit during quieter periods

Edinburgh's tourism sector should build on its relationships with other key sectors of the city's economy, including the academic sector, travel tech, food & drink in order to encourage deeper forms of collaboration around shared goals

Edinburgh should build on its status as a gateway city for the rest of Scotland by building alliances with other Scottish destinations. These alliances should be aimed at increasing the overall value of tourism to Scotland, and on spreading the impact of tourism around the country as widely as possible

Edinburgh should strengthen its relationship with other international destinations in order to ensure continued knowledge sharing around best practices in urban tourism management and explore opportunities for collaborative working

**Potential indicators for success:**

- The establishment of a leadership, governance and delivery model that is based around delivering this strategy
- The quality and quantity of engagement from city tourism stakeholders in developing the action plan from this strategy
- The number of tourism businesses engaged in formal B2B partnerships in the city, and their level of satisfaction with these
- The number of partnership agreements implemented between Edinburgh and other Scottish and international destinations
- The level of satisfaction around investments from TVL funds

## 5. We will nurture and develop our reputation

**The ultimate goal:** Edinburgh’s best ambassadors are its residents, businesses and visitors. Therefore, we must work across a wide range of areas to ensure that the conversation around tourism in Edinburgh, both in the city and beyond is a positive one. We want Edinburgh to be well known for its progressive approach to managing tourism for the good of the environment and local communities, and the quality of the visitor experience. A good reputation will encourage visitors to recommend the city to others and return in the future. Working with national and international partners, we must concentrate on building the city’s reputation among sectors that will most help the city to address the Eight Enablers of Growth; for example, economic sectors that are aligned with the city’s strengths, and the cultural sector.

### **Our ambitions:**

- There is a well-understood definition of Edinburgh’s vision as a city, of how its citizens would like to see the city develop in the future
- The city is positively reflected in national and international media for its approach to tourism management and delivery, and the quality of the visitor experience
- Visitors feel welcome and are highly satisfied with the quality of products and services on offer
- The city benefits from an enhanced reputation among residents and visitors and it lives up to its status as a capital city, by offering a diverse cultural offer that appeals to a wide range of audiences

### **Reputation: Principal recommendations**

Understand the issues and ambitions that are important to the people of Edinburgh (for example, through the Edinburgh 2050 Vision programme)

Ensure that tourism in the city is widely supported its residents who are proud of the city and welcoming to visitors

The city should focus on place-based reputation management, by providing an optimal living environment for residents and a high-quality visitor experience

Work on the basis that ‘others do the talking’ about the city, and it is the city’s role to manage and enhance its reputation by curating and amplifying conversations which influence perceptions about the city

The city should strengthen partnerships with national and international agencies that can help enhance the city’s reputation and deliver key messages about the city’s strengths as a place to live, work, study, invest and visit

Ensure that Edinburgh’s ambition to achieve the goals of this strategy is clearly understood inside and outside the city

Focus on developing partnerships and on developing products and services that will enhance the city’s reputation, that are aligned with residents’ own vision of the city they would like to see and that will enhance their quality of life

Work within and beyond the tourism sector to ensure that Edinburgh strengthens its reputation in key sectors of its economy and that the city’s own business community can benefit from these relationships, for example, through business events held in the city

Develop a reputation for the city that goes beyond its traditional attractions and helps the city to become better known for the city’s status as an outward-looking, well-connected European capital city with all the attributes and experiences that this implies

**Potential indicators for success:**

- The alignment of residents’ perceptions of the city, with those of visitors
- Residents’ satisfaction with tourism and its impact on the city
- The volume of positive coverage about the city in national and international media
- The level of visitor satisfaction and their ratings of the city’s products and services
- Edinburgh’s competitiveness across key economic and social indicators with its peers

## Delivering this strategy

There is currently a range of organisations engaged in tourism leadership, governance and delivery in Edinburgh and the Strategy Implementation Group which brings these together, has taken the lead in commissioning and overseeing the development of this 2030 Strategy.

The evidence reviewed and consultations carried out in developing this strategy found that visitor demand is strong in Edinburgh and will continue to grow in the future. It also indicated that new demands will be placed on the various bodies responsible for tourism leadership, governance and delivery in the city.

Balancing major events, group travel as well as possible disruption caused by major projects such as the City Centre Transformation will also require greater collective coordination and intervention in order to mitigate the effect on the city's infrastructure and on residents' quality of life. A world which is likely to pose increasing challenges related to climate change, technological advancements and consumer trends will also require our approach to help the city become more resilient and flexible in addressing new challenges and opportunities.

For this reason, it is imperative that tourism leadership governance and delivery in Edinburgh is built around the requirements of this strategy. Decisions should be taken on exactly how this to be done once the strategy has been approved and published in early 2020.

## How to get involved

***To be completed with the final strategy document.***



## BACK COVER

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