

Donald Emslie Chair of ETAG

31 March 2022

What Just Happened....?

From this...

- 4.9 million visits a year
- Visitor spend of around £4 million EACH DAY
- Generating an annual economic injection of £1.9 billion
- Supporting almost 34,000 jobs
- Edinburgh accounting for 31% of all overnight visits in Scotland and 34% of the total overnight visitor spend
- From position of strength - launch of new Edinburgh Tourism Strategy 2030

To this...

- From 'Managing Growth' to ZERO tourism
- Lowest air passenger no's since 1995
- 2.9 million fewer stays in hotels in 2020
- 76% drop in attraction visitor numbers in 2020 (higher than the Scottish average)
- Cancelled/scaled back Festivals & Events
- Lost skills/talent – benefits claims in city up by 158% - includes many from our sector
- Predictions of 4 to 5 year recovery

Where are we now...

- Lifting on covid restrictions on international travel
- Edinburgh Hotels Association – 15% to 20% down on this time in 2019
– occupancy starting to improve and room rates
- Airport – in February sitting at 63% recovery, compared to 2019
- Attractions – top two paid & free attractions in Scotland were in Edinburgh last year

VisitScotland Insights

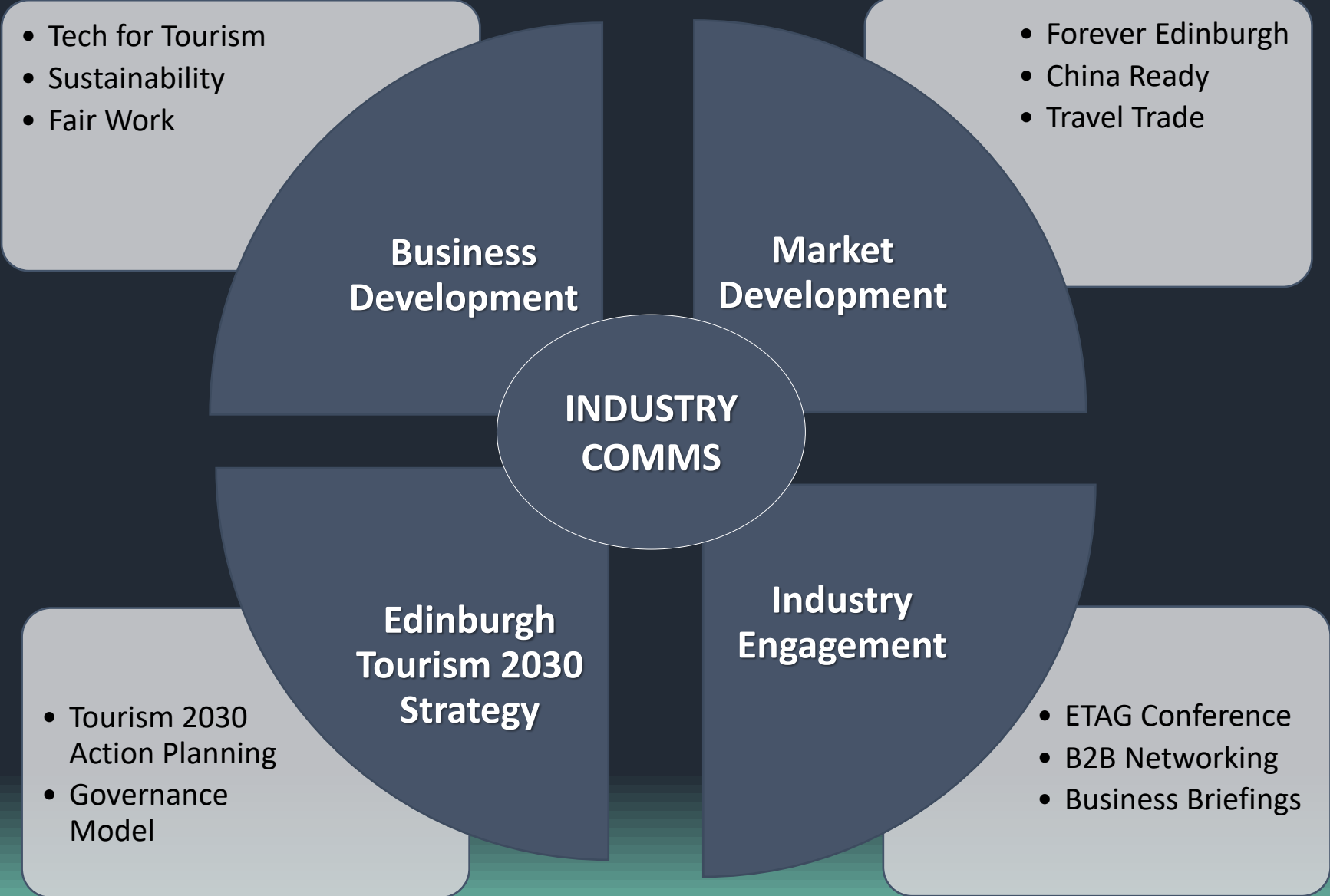
- Areas most visited in Scotland
- Scotland vs non- Scotland residents
- First time vs repeat visitors
- Where People would be likely to stay

But... we're not out of the woods

- Ongoing lack of consumer confidence due to Covid (& potential for new variants)
- Increased cost of doing business (fuel, wages, taxes)
- Brexit
- Labour Supply
- Increased cost of living
- Ukraine War
- Policy Landscape - Low-Carbon/Net Zero, Fair Work, Short-term Lets...

ETAG UPDATE

ETAG Forward Plan



Key Highlights



- Industry Comms:
 - New monthly ETAG Newsletter
- Industry Engagement:
 - ETAG Conference 2022
 - Upcoming programme of Business Briefings
 - Revival of Edinburgh Tourism Showcase
- Market Development:
 - New Travel Trade Resource – digital guide and 2 upcoming workshops
 - Introducing Unpack China
 - China Ready Social Media Project – Year 7
 - Supporting Forever Edinburgh Team

Advancing Tourism 2030 Strategy

- Strategy Implementation Group
- Industry-led operational group
- New Project Office
- Appointment of a new full time Programme Manager and a part-time Project Coordinator
- Key areas of focus:
 - Development of Tourism 2030 Action Plan
 - Explore new and innovative tourism governance model - to deliver agenda going forward