

Policy and Sustainability Committee

10.00am, Tuesday, 26 November 2019

Tourism Statement and Strategy Consultation

Executive/routine Wards Council Commitments	Executive All
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1. Recommendations

- 1.1 Policy and Sustainability Committee is asked to:
 - 1.1.1 Approve the updated draft Council tourism policy statement (appendix 1);
 - 1.1.2 Note the summary of the discussion at the Elected Member briefings on 15 August 2019 (appendix 2);
 - 1.1.3 Note the draft tourism strategy in appendix 3 which is currently out for consultation and that the consultation closes on 30 November 2019;
 - 1.1.4 Encourage citizens, community councils and other interested parties to contribute to the consultation; and
 - 1.1.5 Note that the final strategy will be considered at a special meeting of the Policy and Sustainability Committee on 21 January 2020.

Paul Lawrence

Executive Director of Place

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Tourism Statement and Strategy Consultation

2. Executive Summary

- 2.1 This report has been prepared in response to Committee's request for an update of the Council's tourism statement now that the draft Tourism Strategy 2030 is available (the consultation document is attached in appendix 3). The report also includes a summary of the comments and questions from the briefings for Elected Members.

3. Background

- 3.1 [Edinburgh 2020](#) was launched in January 2012 and set out the city's ambitions for growth in tourism up to 2020.
- 3.2 Given the approach of the end of the Edinburgh 2020 strategy period the Strategic Implementation Group (SIG) was tasked with developing a new strategy for the city. The SIG is chaired by the Council's Chief Executive and includes Elected Member representatives. The strategy development began in October 2018 and is expected to be completed by January 2020.
- 3.3 ETAG are supporting the development of the new strategy in partnership with a number of city stakeholders, including the Council. Each partner has its own governance structure and the final draft of the strategy will be considered by each partner in advance of the final published document.
- 3.4 A Tourism and Communities working group was established in 2018 to ensure that resident views were also included in the strategy development. The working group comprises two representatives from the Culture and Communities, Transport and Environment and (then) Housing and Economy Committees. These discussions, as well as wider Council policies such as the Economy Strategy, are evident in the strategic direction of the draft strategy.
- 3.5 On [14 May 2019](#), the Corporate Policy and Strategy Committee approved, on an interim basis, a draft Policy Statement on Tourism.
- 3.6 Policy and Sustainability Committee considered the arrangements for the Tourism Strategy being developed on [25 October 2019](#). Committee requested an update on

the Tourism Statement, alongside the draft consultation document and the following additional information was requested:

- 3.6.1 Regrets that no note of the elected member briefing on 15 April 2019 has been produced given the considerable feedback provided across the political spectrum at that meeting and detailed notes provided from other meetings; therefore, agrees to circulate to committee members the output of the meeting and instructs the Executive Director of Place to report to Committee alongside the draft strategy on 26 Nov 2019 detailing how this and other consultation information has been assessed and incorporated in the draft strategy or, if rejected, why?

4. Main report

Tourism Statement

- 4.1 Following the request from Committee on 25 October 2019, the interim Tourism Statement has been reviewed and an updated version is included in appendix 1 of this report.
- 4.2 As requested in the motion of May 2019, the feedback from the strategy consultation will be provided to Committee on 21 January 2020.

Elected Member Briefings – 15 August 2019

- 4.3 As set out in paragraph 3.6.1, Committee recorded its disappointment that no note had been published from the Elected Member Briefings on the emerging strategy. These meetings took place on 15 August 2019.
- 4.4 Unfortunately, a detailed minute of the meeting was not taken however a summary of the points raised by Councillors has been prepared and is attached in appendix 2.

Draft Strategy Document

- 4.5 The draft strategy has been developed taking account of the feedback received through phases 1 and 2 of the consultation.
- 4.6 The draft strategy also reflects changes which are being seen in other cities across Europe, particularly in respect of changing priority from tourism promotion to a much greater emphasis on managing the impact of tourism. The strategy now explains what tourism can do for Edinburgh, how it can better support the city economy and includes key issues such as responding to the climate emergency and ensuring tourism contributes to the Council's economic policies as set out in the Economy Strategy for good growth.
- 4.7 At phase 1, the information gathered was mainly desktop research (including benchmarking with other cities) and included Council reports as well as local media and social media stories.
- 4.8 Phase 2 included meetings with representatives from the Culture and Communities Committee, the Tourism and Communities Working Group to which community

council and resident group representatives were invited, and the Elected Member discussions (summarised in appendix 2).

Tourism Strategy Consultation

- 4.9 The new draft Edinburgh 2030 tourism strategy is attached in appendix 3. This is also now available on the Council's consultation hub (<https://consultationhub.edinburgh.gov.uk/ce/edtourism2030/>). The consultation closes on 30 November 2019.
- 4.10 The final strategy will be considered at a special meeting of this Committee on 21 January 2020. The strategy will also be considered by all of the partner organisations before the ETAG conference on 30 January 2020, with the final strategy is expected to be launched in February 2020.
- 4.11 The draft strategy sets out five priorities under the heading 'Towards 2030 we will nurture and develop.....':
- 4.11.1 Our Place;
 - 4.11.2 Our Environment;
 - 4.11.3 Our People;
 - 4.11.4 Our Partnerships; and
 - 4.11.5 Our Reputation.
- 4.12 Under each heading there is an explanation of what this means as well as what the goal and ambitions could be.
- 4.13 Committee members are asked to share this information with citizens, community councils and other partners to encourage a broad range of responses.

5. Next Steps

- 5.1 The strategy consultation will continue until 30 November 2019.
- 5.2 The draft strategy will be reviewed to ensure that it reflects any policy changes approved by the Council while the strategy has been developed to ensure that it reflects the Council's current policies (e.g. sustainability and city centre transformation) and, if agreed, the revised interim tourism statement (appendix 1).
- 5.3 A Strategic Environmental Assessment (SEA) will be progressed for the Edinburgh 2030 strategy. This will build on the stated commitments within the draft strategy that tourism will proactively contribute to the city's goal of achieving zero net carbon emissions by 2030 and that a tourism-sector specific programme for this (aligned with the City of Edinburgh Council's plans) will be developed.
- 5.4 Feedback from this Committee and the Culture and Communities Committee discussion on 12 November 2019 will be considered as the strategy is finalised.
- 5.5 A special meeting of Policy and Sustainability Committee on 21 January 2020 will consider the final strategy.

- 5.6 Partner organisations will consider the final Edinburgh 2030 strategy (including the Council) early in the new year, with ETAG members discussing it at their Conference on 30 January 2020. The final strategy is expected to be launched in February.
- 5.7 Once the final strategy is in place and to support its implementation, partners will be expected to contribute to the action planning process.

6. Financial impact

- 6.1 The costs of producing the refreshed strategy have been estimated to be £60,000 covering all three stages. The costs include consultation events and fees for consultancy services engaged by ETAG/Scottish Enterprise.
- 6.2 These costs are being met by the Principal Partners (City of Edinburgh Council, Scottish Enterprise and ETAG as well as Strategy Partners including Edinburgh Airport and Edinburgh Hotels Association).
- 6.3 With the approval of the SIG, the Council has provided ETAG with a Grant Agreement for £20,000 (£10,000 in 2018/2019 and £10,000 in 2019/2020).

7. Stakeholder/Community Impact

- 7.1 The strategy development process to date has included broad consultation with the tourism sector and stakeholders including the Council.
- 7.2 The Tourism and Communities Working Group has also participated in these discussions and has invited Community Councils and Resident Associations to participate in the process.
- 7.3 Public consultation is underway and will continue until 30 November 2019. It has been published on the Council's consultation hub and is being promoted through stakeholder networks and via libraries and other communication channels. Two 'drop-in' events are also planned.
- 7.4 All feedback received will be considered and reflected in the final strategy as appropriate.
- 7.5 The emerging strategy is being developed with consideration of the sustainability impacts associated with tourism. It has also included the Council's decision in May 2019 to agree a target emergency target of net-zero carbon by 2030.
- 7.6 In line with the statutory requirements to assess, consult and monitor the likely impacts of plans, programmes and strategies on the environment, ETAG (on behalf of the partners) will lead the development of a SEA for this strategy.

8. Background reading/external references

- 8.1 Tourism Strategy Update Report, Housing and Economy Committee [21 March 2019](#).
- 8.2 Managing Tourism Report, Culture and Communities Committee [30 January 2018](#).

9. Appendices

- 9.1 Appendix 1 – Revised Interim Tourism Statement.
- 9.2 Appendix 2 – Summary of Elected Member Feedback from Briefings on 15 August 2019.
- 9.3 Appendix 3 – Draft Edinburgh 2030 Tourism Strategy for consultation.

APPENDIX 1

Revised draft Policy Statement on Tourism

- 1.1 Edinburgh is one of Europe's foremost visitor destinations, renowned for its creativity, distinctiveness and unique culture and heritage. The city's character and vibrancy make it a destination with global appeal. The city's built and natural assets are a unique blend, and its character is reflected and shaped by the residents of the city. Like most capital cities, we are a gateway to the rest of the country.
- 1.2 One of Edinburgh's most distinctive features is that established residential communities are to be found right across the city, including in the city centre. Ensuring this remains the case for many years to come, at a time of technological and commercial change, is an important challenge for the city to address.
- 1.3 The quality of life for residents and the attractiveness of Edinburgh as a destination are inextricably linked. The one cannot suffer at the expense of the other. Distinctiveness and authenticity are what attracts the visitor and what makes the city such an exciting place to live in. Getting this balance right is essential for any tourism strategy.
- 1.4 The City of Edinburgh Council recognises the important contribution that visitors, and the resultant tourism industry make to the city economy in terms of jobs, investment and GVA. The Council also recognises that both city growth, and a growth in visitor numbers, are likely to remain long term trends.
- 1.5 In line with the Edinburgh Economy Strategy, the Council supports the ambitions of the tourism sector and its partners and seeks to ensure our residents, visitors and businesses continue to benefit from the sector's success. However, there is a tendency for jobs in the sector to be relatively low paid and low skilled, characterised by short term contracts. This needs to change, with an increasing move to higher skilled, secure jobs where companies invest in their workforce for the long term. The Council is already actively supporting initiatives in the hospitality sector with the developers of Edinburgh St James, and in the retail sector through the Capital City Partnership. Partners such as Edinburgh College will have a key role to play in helping support this activity.
- 1.6 The Council is committed to achieving the right balance between a thriving tourism economy with quality of life for residents, and ensuring a manageable impact of the sector on the city's infrastructure, wider social and historic fabric, and natural environment. Three areas of particular concern must be addressed:

- 1.6.1 the short term lets market, where the tourism sector is a significant distortion to the wider housing market, more so than in any other city in the UK;
 - 1.6.2 the commercial office sector, where the needs of the accommodation market are crowding out more productive economic uses; and
 - 1.6.3 the diversity and authenticity of the city's cultural and retail offer.
- 1.7 Sustainability, in the broadest sense of the term, should be the hallmark of the visitor economy in the city. The sector must play a full role in achieving the city's ambition of achieving net zero carbon emissions by 2030. This will require hard choices and new ways of working.
- 1.8 The City of Edinburgh Council therefore seeks to support the tourism industry and the visitor economy in ways that will:
 - 1.8.1 ensure the right balance between residents and communities and the tourism sector, including in the housing and accommodation sector;
 - 1.8.2 improve access to fair, good quality jobs;
 - 1.8.3 embrace the principles of low and zero carbon tourism, and to ensure the sector has no negative environmental impact;
 - 1.8.4 enhance the assets of the city for the benefit of residents and visitors;
 - 1.8.5 ensure the economic benefit of tourism can be shared among all in the city;
 - 1.8.6 spread the benefits of the sector around Edinburgh as a whole (including at locations such as the Forth Bridges, the Pentland Hills and the Waterfront), the wider city region, and Scotland as a whole;
 - 1.8.7 encourage the use of innovative approaches and digital technologies in the sector; and
 - 1.8.8 encourage collaboration within the partnership network including key public and private sector agencies.
- 1.9 The City of Edinburgh Council recognises the additional pressure that significant visitor numbers place on public services. In keeping with this understanding, it is the Council's policy to pursue the introduction of a Transient Visitor Levy (TVL) to enable sustainable investment in supporting and managing the impact of tourism in the city. Once in place, the TVL must be used to deliver the outcomes set out in key city and Council policy documents, benefitting both the city and helping shape the future growth of the industry.
- 1.10 The Council is committed to working with all partners to deliver the Edinburgh 2030 Tourism Strategy. In particular, the major strategic move from driving

growth to managing growth will mean a new role for the Council. The aims of nurturing and developing our Place, our People, our Environment, our Partnerships, and our Reputation, are in accordance with the Council's Economy Strategy, and other key strategic policies.

- 1.11 The relevant Council service areas which will contribute to the delivery of the Strategy are set out below. While the Council will have a leadership role in some areas, the majority will require new approaches to partnership working. The detail of this will be finalised as the action planning process for the 2030 Strategy is complete.

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our Place	<ul style="list-style-type: none"> 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 and visitors as new developments in neighbourhoods and outlying areas in the City Region are developed and easy to reach by public transport. 	<p>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.</p>	Planning
		<p>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.</p>	Planning Transport Business Growth and Inclusion
		<p>Research should be carried out to identify which spaces are liable to crowding and these should be prioritised for enhanced management.</p>	Culture Transport
		<p>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.</p>	Regulatory Planning
		<p>Technology and data driven solutions should be introduced to improve visitor capacity management in public spaces, visitor attractions and during peak periods.</p>	Business Growth and Inclusion
		<p>Building use should be monitored, and where appropriate, measures taken to seek a balance of uses that respond to the needs of the city.</p>	Planning
		<p>Extending tourism's footprint into local neighbourhoods should be aligned with the City of Edinburgh Council's Locality Improvement Plans (LIPs).</p>	Culture Localities
		<p>Edinburgh should work to improve connectivity to and around the city, including seamless, integrated transport</p>	Transport

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our People	<ul style="list-style-type: none"> 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. 	Residents should be consulted on tourism-related developments, for example, when LIPs are prepared, or when certain specific developments are proposed.	Planning Localities
		Monitor resident sentiment surrounding tourism in a consistent and sustained manner in order to inform tourism-related planning and decision making.	Strategy & Communications
		Encourage and facilitate local residents to engage and participate in cultural activities including events, festivals and visitation at museums and galleries.	Culture Lifelong learning
		Communicate with residents and visitors in order to identify and tackle nuisance issues. This should involve relevant tourism suppliers (e.g. hotels, tour guides).	Business Growth and Inclusion Regulatory Waste & Cleansing
		Work to ensure that Edinburgh's tourism sector is delivering fair, inclusive and rewarding jobs for those who are employed in the sector.	Business Growth and Inclusion
		Ensure that business leaders have the right skills to operate responsible and efficient tourism businesses.	Business Growth and Inclusion
		Help businesses to stay up to date with regulations that relate to workforce management e.g. related to migration, work permits, health and safety).	Business Growth and Inclusion
		Assist businesses in planning and preparing for long-term changes in skills requirements such as automation, digitalisation).	Business Growth and Inclusion
Ensure that Edinburgh's tourism workforce has the right skills (especially digital) to ensure that they meet the needs consumers' evolving needs.	Business Growth and Inclusion		

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our Environment	<ul style="list-style-type: none"> 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. 	<p>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.</p>	<p>Strategy & Communications Culture</p>
		<p>Edinburgh’s tourism sector should seek to measure its overall “invisible burden” and put in place plans to mitigate this wherever possible.</p>	<p>Strategy & Communications</p>
		<p>Edinburgh’s tourism sector should actively explore opportunities to minimise waste and optimise use of existing resources through developments in the circular economy.</p>	<p>Waste & Cleansing Culture</p>
		<p>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.</p>	<p>Planning</p>
		<p>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.</p>	<p>Culture Strategy & Communications</p>
		<p>Tourism sector stakeholders should work together to co-design enhanced solutions for reducing traffic related impacts generated through the servicing of the tourism sector.</p>	<p>Transport</p>
Our Partnerships	<ul style="list-style-type: none"> 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. 	<p>The structure, funding and organisational model for tourism leadership, governance and delivery in Edinburgh should be based around the requirements of this strategy</p>	<p>Strategy & Communications</p>
		<p>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</p>	<p>Strategy & Communications</p>
		<p>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</p>	<p>Strategy & Communications</p>

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
	<ul style="list-style-type: none"> 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 	<p>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.</p>	<p>Strategy & Communications</p>
		<p>Work in partnership to ensure the right conditions for a thriving, responsible, sustainable economy.</p>	<p>Business Growth and Inclusion</p>
		<p>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.</p>	<p>Business Growth and Inclusion</p>
		<p>Partners should actively work together to encourage year-round tourism, recognising the need to offer new reasons to visit during quieter periods.</p>	<p>Culture Business Growth and Inclusion</p>
		<p>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.</p>	<p>Business Growth and Inclusion</p>
		<p>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.</p>	<p>Transport</p>
		<p>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.</p>	<p>Strategy & Communications</p>

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our Reputation	<ul style="list-style-type: none"> • 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 	<p>Understand the issues and ambitions that are important to the people of Edinburgh (for example, through the Edinburgh 2050 Vision programme)</p>	<p>Strategy & Communications</p>
		<p>Ensure that tourism in the city is widely supported by its residents who are proud of the city and welcoming to visitors</p>	<p>Strategy & Communications</p>
		<p>The city should focus on place-based reputation management, by providing an optimal living environment for residents and a high-quality visitor experience</p>	<p>Planning Transport</p>
		<p>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</p>	<p>Business Growth and Inclusion</p>
		<p>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</p>	<p>Strategy & Communications Business Growth and Inclusion</p>
		<p>Ensure that Edinburgh’s ambition to achieve the goals of this strategy is clearly understood inside and outside the city</p>	<p>Strategy & Communications</p>
		<p>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</p>	<p>Business Growth and Inclusion</p>
		<p>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</p>	<p>Business Growth and Inclusion</p>
		<p>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.</p>	<p>Strategy & Communications Business Growth and Inclusion</p>

Appendix 2

Emerging Tourism Strategy

Summary of Elected Member Briefing Sessions 15 August 2019

Attendees:

Councillor Aldridge;
Councillor Bruce;
Councillor Cameron;
Councillor Jim Campbell;
Councillor Child;
Councillor Dixon;
Councillor Doran;
Councillor Graczyk;
Councillor Griffiths;
Councillor Henderson;
Councillor McNeese-Mechan;
Councillor McLellan;
Councillor Mitchell;
Councillor Mowat;
Councillor Whyte;
Councillor Rose;
Councillor Staniforth;
Councillor Wilson; and
Councillor Work.

A summary of the themes/questions is provided below:

- Has the scope/brief been industry led and market driven rather than in line with the Council view? Councillors felt that the representative consultees were drawn from a small group and that Councillors should have played more of a leading role. Although involvement and leadership are greater now, this should have happened earlier in the process.
- Is the feedback truly representative?
- Is the strategy focussed on the tourism industry or tourism activity?
- Has sustainability been considered and incorporated into the strategy?
- Concern about over-tourism.
- There is no doubt about the reality that Air BnB is damaging the city. The consultation seems to favour accommodation providers. Need to recognise that there have always been 'party flats' but now there are more.
- There is concern about ETAG leading the development of the strategy as they are not elected. ETAG are effective at co-ordinating and facilitating industry.
- The capacity and size of Edinburgh as both an advantage and disadvantage.
- The information presented under reputation and image does not include the night-time economy
- Would like to see the strategy link the various areas of the city, so as not to be seen as disparate parts e.g. Waterfront as an asset with potential for future development and with Leith potentially the best prospect for broadening visitor footprint. However other Councillors expressed concern that these areas should not be the focus to spread footfall and that the strategy should consider other areas e.g. connectivity with the waterfront and the tourism impacts/benefits for the Bridges and South Queensferry should be recognised.
- Request that if the Council signs off on the strategy there should be a quid pro quo that industry supports some of the wider Council programmes.
- Recognising the youth market has its challenges.

- Concern that the industry and the Council do not agree on "the truth" and that they expect the Council to run and co-ordinate tourism to a greater extent.
- Request to identify what sectors are most open to collaboration (for example: attractions and culture venues).
- Request to identify what the barriers are for small business to pay living wage.
- It is important to be clear on what authenticity is and who/how this is defined.
- Request to understand why collaboration and consistent operating hours are not in place already.
- Important to put city first; clearly explaining integration, providing clear objectives, and recognising the impact on communities. Stronger arrangements for management are required
- Request to understand if seasonality is coming out as something industry wants to fix in Edinburgh. The city's capacity to deal with high numbers all year round is not great.
- Councillors expressed concern that the consultation has not been extensive especially within the Council. The Tourism and Communities working group was set up "in spite of" the strategy development process. The Council and elected members should have been more involved.
- Concern was expressed that the Council's role is to protect the city and its assets and that tourism should be better supported by private investment
- The city's accessibility for people with disabilities should be addressed.
- Concern was expressed that people working in hospitality rely on tips to make up their wages. Can more be done to ensure that people are paid decent wages, reducing the dependency on tips?
- Concern was expressed about productivity in the industry and that this could lead to lead to exploitation of people and places.
- Request to ensure that the Tourism and Communities working group consultation is reflected properly within the strategy development as the group represents all of the city's citizens. If the significant number of citizens represented is not recognised and is counted as only one consultee then citizens voices will not be properly heard.
- The cost and impact of high season is slowing down productivity for the rest of the city.
- Lack of public toilets is an issue increasing the reliance on business toilets; where there is potential for toilets only to be available to customers and cleanliness may be an issue.



Edinburgh
Tourism
Strategy
2030

Edinburgh 2030 Strategy

Draft for consultation
November 2019



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

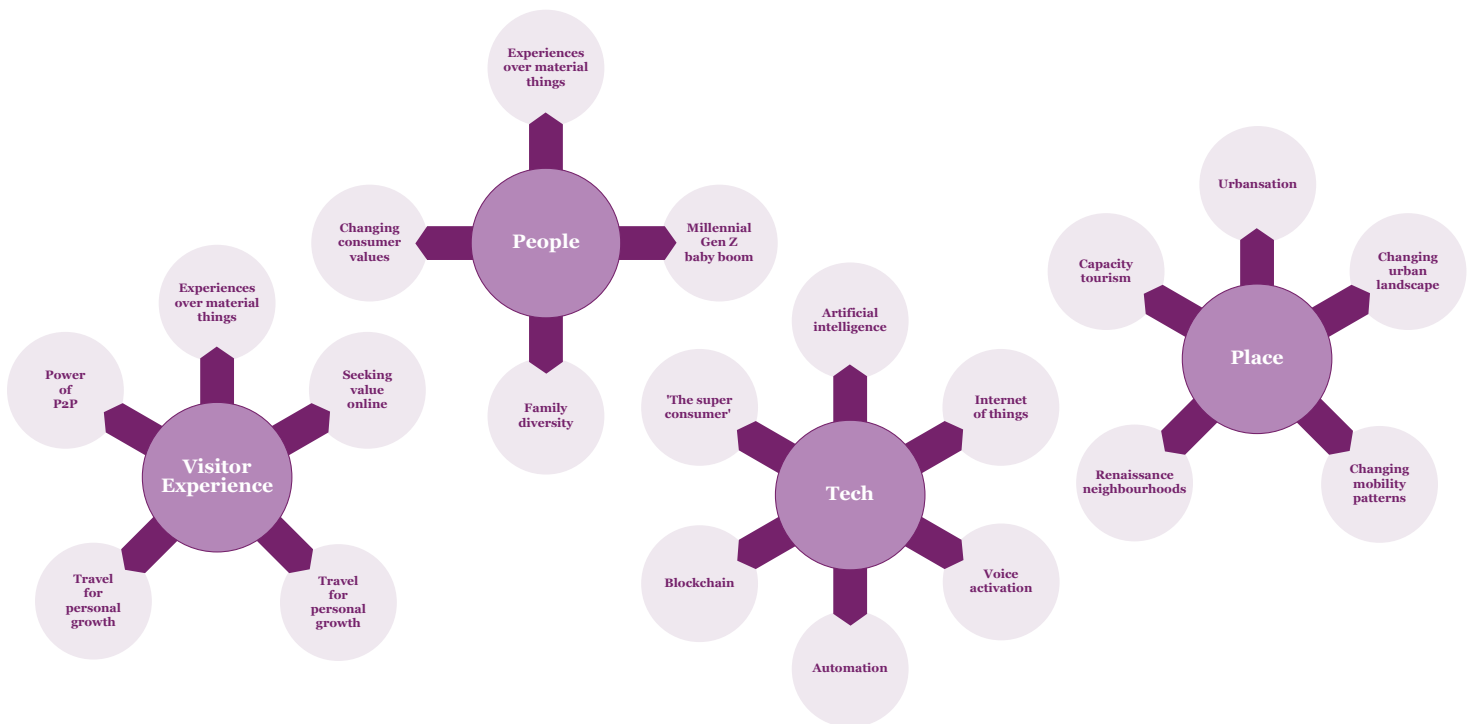
Strategy development. As the strategy is being drafted, it will be tested, reviewed and refined through multiple stages. The public consultation exercise is a key element of the process, providing Edinburgh's residents, businesses and tourism stakeholders with the opportunity to make their views known 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 & 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 well-being 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 con-

sumer 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':

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.



Our five priorities for action...

Towards 2030 we will nurture and develop...



Our
place



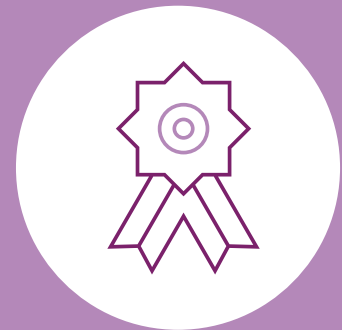
Our
people



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 and visitors 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 space

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 informed 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 to 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

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 by 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.

Disclaimer:

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**Edinburgh
Tourism
Strategy
2030**

TOPOSOLOGY
PLACE MAKING & MARKETING AGENCY

This report was produced on behalf of the
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<https://www.etag.org.uk/edinburgh-2020/developing-the-edinburgh-2030-strategy/>