Policy and Sustainability Committee

10.00am, Tuesday, 21 January 2020

Tourism Strategy 2030

Executive/routine	**Executive**
Wards	**All**
Council Commitments	

1. Recommendations

1.1 Policy and Sustainability Committee is asked to:

1.1.1 note the feedback received on the draft Tourism Strategy;

1.1.2 endorse the final draft Tourism Strategy 2030, as set out in Appendix 1;

1.1.3 note that the final draft strategy is being considered by all stakeholders and will be shared at the Edinburgh Tourism Action Group (ETAG) Conference on 30 January 2020; and

1.1.4 note that it is anticipated that the final strategy will be published by the end of February 2020.

Paul Lawrence

Executive Director of Place

Contact: Paul Lawrence, Executive Director of Place

E-mail: paul.lawrence@edinburgh.gov.uk | Tel: 0131 529 7325

Report

Tourism Strategy 2030

2. Executive Summary

2.1 This report provides Committee with the final draft of the Tourism Strategy 2030 for endorsement on behalf of City of Edinburgh Council.

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 February 2020.

3.3 ETAG is the body which has taken forward the new strategy process. ETAG is a partnership between major stakeholders in the city including the Council, Visit Scotland, Scottish Enterprise, Edinburgh Hotels Association and others. 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?

3.7   Policy and Sustainability Committee considered the draft strategy alongside the Council's Tourism Statement on 26 November 2019. In addition to the report recommendations, Committee also agreed to:

3.7.1   note the potential "indicators of success" detailed in the draft strategy and that no such measures are outlined in the Council Tourism Policy Statement and therefore agrees that SMART measures be developed to track the success of the Strategy and that these should be submitted for scrutiny/approval, along with baseline data when the strategy is considered as outlined in recommendation 1.1.5; and

3.7.2   the 'Our Place' section should include at end of recommendations 'To include consideration of the night-life economy when taking decisions about transport and development in order to ensure that venues in Edinburgh, particularly live music venues, can thrive.'

3.8   The tourism statement has been updated to reflect the change requested (as outlined in paragraph 3.7.2 and is attached for reference in Appendix 2.

4.   Main report

4.1   The new draft Edinburgh 2030 tourism strategy is attached in Appendix 1.

4.2   The consultation period ran from 4 November – 15 December 2019. There were 520 submissions made through the consultation hub, with over 400 responses from residents of the city. Full details of the feedback from the consultation will be published on the consultation hub by 17 January 2020.

4.3   The aim of the new strategy is to set a shared, common overarching 10 year framework for tourism which all the stakeholders can support in principle and respond to specifically within the context of their own roles, responsibilities and objectives. The new tourism strategy sees a substantial step change in the proposed approach to tourism in the city going forward, with the key changes including:

4.3.1   An explicit shift "from driving growth to managing growth";

4.3.2   Clearly and directly aligning the tourism strategy with the wider development of the city through the Council's Edinburgh Economy Strategy (June 2018) and a range of key policies, such as the commitment to achieve net-zero carbon emissions by 2030, tackling worklessness and poverty;

4.3.3 Recognition of the extent to which tourism impacts on the quality of life for Edinburgh residents and the need to mitigate the negative impacts and ensure that tourism is a "benefit, rather than a burden"; and

4.3.4 Relating to the point above, the recognised need for far greater inclusion and participation of residents in the development and delivery of tourism activity.

4.4 The feedback to the strategy consultation included:

4.4.1 A request for clarity on the ownership of the strategy. Some have assumed that it is a Council strategy, while others have interpreted ETAG's facilitation role in the development of the strategy to mean that it is an ETAG/industry strategy. Neither is the case, as the strategy has been developed very explicitly as Edinburgh's Tourism Strategy, recognising and reflecting the fact that the delivery and management of tourism in the city involves an extremely wide ranging, complex and diverse range of partners that need to work collaboratively to deliver it;

4.4.2 Concern that the strategy does not cover issues which are specifically impacting on the lives of local residents (including cleanliness, waste management, traffic congestion and short term letting. The strategy is not designed to include this level of detail however the Council has received details of all of the issues raised and will ensure that these are considered as service improvements and operational changes are planned;

4.4.3 Feedback on the retail offering in the city. Again, this is not something that the strategy considers, however this feedback will be shared with relevant organisations to ensure that it is taken on board when developing retail strategies and plans; and

4.4.4 A clear request to focus on balancing the needs of residents alongside those of businesses and residents. Residents did indicate that they would have liked to have been involved earlier in the development process.

4.5 Of the five priorities identified in the strategy, there was significant feedback that four of the five were very or quite important. This shown below in Table 1.

	Very Important	Quite Important	Neither important or unimportant	Quite Unimportant	Very Unimportant	Don't know/No opinion	Not Answered
Place	78.58%	18.85%	4.62%	1.15%	1.15%	2.12%	0.77%
People	78.27%	13.08%	3.85%	0.58%	0.58%	2.12%	0.77%
Environment	79.23%	14.04%	2.50%	2.50%	1.35%	0.96%	0.77%
Partnerships	24.42%	30.38%	22.31%	9.04%	9.23%	3.23%	1.15%
Reputation	45.19%	27.12%	13.46%	13.46%	4.42%	6.54%	1.92%

Table 1: Consultation feedback on the importance of each priority within the strategy

4.6 The priority which received the least support was that of Partnerships. The reasons given/or considered for this were:

4.6.1 residents felt that they were not considered/ included as partners or stakeholders;

4.6.2 a significant number of responses identified Partnership as being "neither important or unimportant" which possibly reflects the fact that residents are less aware of the broad range of stakeholders and therefore the importance of partnership working to successfully deliver the city's tourism; and

4.6.3 the partnerships were focussed on or dominated by private sector/commercial interest.

4.7 The importance of reputation was also ranked slightly lower than the other priorities with the following reasons given:

4.7.1 "reputation" is equated with "marketing/promotion" and "selling the city";

4.7.2 concern that Edinburgh's reputation was already suffering from over tourism; and

4.7.3 there is a need to build/rebuild relations with local residents to enhance the city's reputation.

4.8 Overall, there was broad support for the ultimate goals and ambitions with less support for the principal recommendations.

4.9 As a result of the feedback received there has been no material changes to the overall approach in the strategy. The main changes are:

4.9.1 Some illustrations of the extent to which tourism contributes to the wider city/Scotland economy (Pages 8 and 9);

4.9.2 An additional recommendation has been added to reflect the feedback that that visitor spend should be retained within the local economy as much as possible, via local sourcing, showcasing local products and using local suppliers (Page 21);

4.9.3 A new model for improving partnership and dialogue between the tourism sector and local residents is more prominently featured as an Ambition (Page 22);

4.9.4 A desire to see Edinburgh represented as a "contemporary" city has been reflected in the strategy (Page 25); and

4.9.5 The section "Delivering this strategy" section (Page 26) has been updated to reflect feedback around:

4.9.5.1 Future leadership, governance and delivery mechanisms;

4.9.5.2 The need to follow up the strategy with a three year action plan; and

4.9.5.3 Establishing SMART objectives and a performance monitoring/reporting model (this will build on the Potential indicators for success).

4.10 Some of the more detailed comments provided in the feedback will be extremely helpful in developing the detailed action plan which will support the delivery of the

strategy, while others are relevant to other Council policies. Some examples are provided in Table 2 below.

Issue	Proposed Action
Greater focus should be given to supporting local shops and to create opportunities for small shops and food outlets to be located in the city centre.	This will be investigated as part of the development of the action plan to support the delivery of the Tourism Strategy.
The increase and impact of Airbnb has a significant impact on residents' quality of life.	The Scottish Government has recently given new powers to local authorities to regulate short term lets. The Council is now preparing for implementation of this.
Residents, particularly in the city centre, are concerned about noise and overcrowding on the city's streets. Restricting traffic and improving pedestrian areas was requested.	For the Summer festivals, Council officers are developing proposals for Summertime Streets and a report to Transport and Environment Committee is planned for February 2020. The Council has also approved City Centre Transformation plans which emphasise walking, cycling and public transport in the city centre. Transport and Environment Committee will consider a draft City Mobility Plan on 16 January 2020. If approved, this will shortly be published for consultation.
Specific requests were made for improvements in managing tourism in local areas e.g. manging the arrival and departure of cruise passengers at South Queensferry	The ideas for local placemaking will be considered as part of the development of the action plan to support delivery of the strategy. Where local action is required, these will be passed on to the appropriate Council team to progress e.g. High Street improvements and traffic management plans in South Queensferry.
Concern was raised about the number of events in Princes Street Gardens and at the bottom of the Mound.	The Council is planning a consultation on the future of Edinburgh's Christmas

	and Hogmanay and also on the use of parks and public spaces.
Improvements are requested in the planning and implementation of active travel schemes in the city	These comments will be passed on to the Council's Active Travel team for consideration when developing new schemes.

4.11 Committee is asked to endorse the strategy on behalf of City of Edinburgh Council.

5.   Next Steps

5.1 The draft strategy is currently being shared with other stakeholders and will be considered at the ETAG Conference on 30 January 2020. Assuming all of the stakeholders endorse the final draft as attached, the final strategy document will be launched by the end of February 2020.

5.2 A Strategic Environmental Assessment (SEA) will now 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.   This process will be led by ETAG, on behalf of all of the partners and stakeholders.

5.3 The feedback to the consultation was extremely clear that, while the principles of the strategy are supported, the baseline data and SMART measures of success which will form the core of the action plan need to be realistic, recognising the importance of managing tourism effectively for residents and clearly articulating how the strategy will be monitored. The feedback also demonstrated the importance of clearly articulating which organisation is responsible for the implementation of the strategy and associated actions.

5.4 The action plan will be presented to Committee in due course and will also reflect the request from Committee in November 2019 (as outlined in paragraph 3.7.1).

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. This included engagement with Elected Members and, through the Tourism and Communities Working Group, Community Councils and Resident Associations.   The Culture and Communities and Policy and Sustainability Committees of the Council considered the draft strategy in November 2019.

7.2 Public consultation ran from 4 November 2019 to 15 December 2019.   As well as being uploaded to the Council's consultation hub, partners promoted the consultation through their networks, the Council's social media account included regular reminders and two drop-in sessions were arranged for the public to submit feedback directly to the ETAG team.

7.3 In total of 520 responses were received.   The final draft strategy has been updated to reflect this feedback and reflects the Council's target of net-zero carbon by 2030.

7.4 The draft strategy is currently being considered by stakeholders and partners and will be considered at the ETAG Conference on 30 January 2020 before the final strategy is published.

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 – Final Draft Tourism Strategy 2030
9.2   Appendix 2 – Updated Tourism Statement

Edinburgh's 2030 Tourism Strategy

Final draft, January 2020

Edinburgh
Tourism
Strategy
2030

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, where tourism either directly or indirectly affects almost everyone.

The strategy is intended to provide a strategic framework that will inform and shape the future of the city's tourism sector up to 2030. It has been prepared as a Strategy for the city, and one from which a wide range of stakeholders will be expected to take their lead.

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 2018-2019, 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 – December 2019

As the strategy was drafted, it was tested, reviewed and refined through multiple stages. The public consultation exercise was 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 was complete, the final draft strategy was updated to reflect public feedback, and was prepared for endorsement by key partners.

This is the final draft of Edinburgh's 2030 Tourism Strategy. It has been prepared on behalf of the Edinburgh Tourism Strategy Implementation Group and incorporates the findings of all the research undertaken during Phase 1, the industry and stakeholder consultations completed in Phase 2 and reflects the findings of the Phase 3 public consultation.

This final draft will be presented to the strategy partners in January 2020 for endorsement.
For more information about the strategy's development, please visit:
https://www.etag.org.uk/edinburgh-2020/developing-the-edinburgh-2030-strategy/

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.
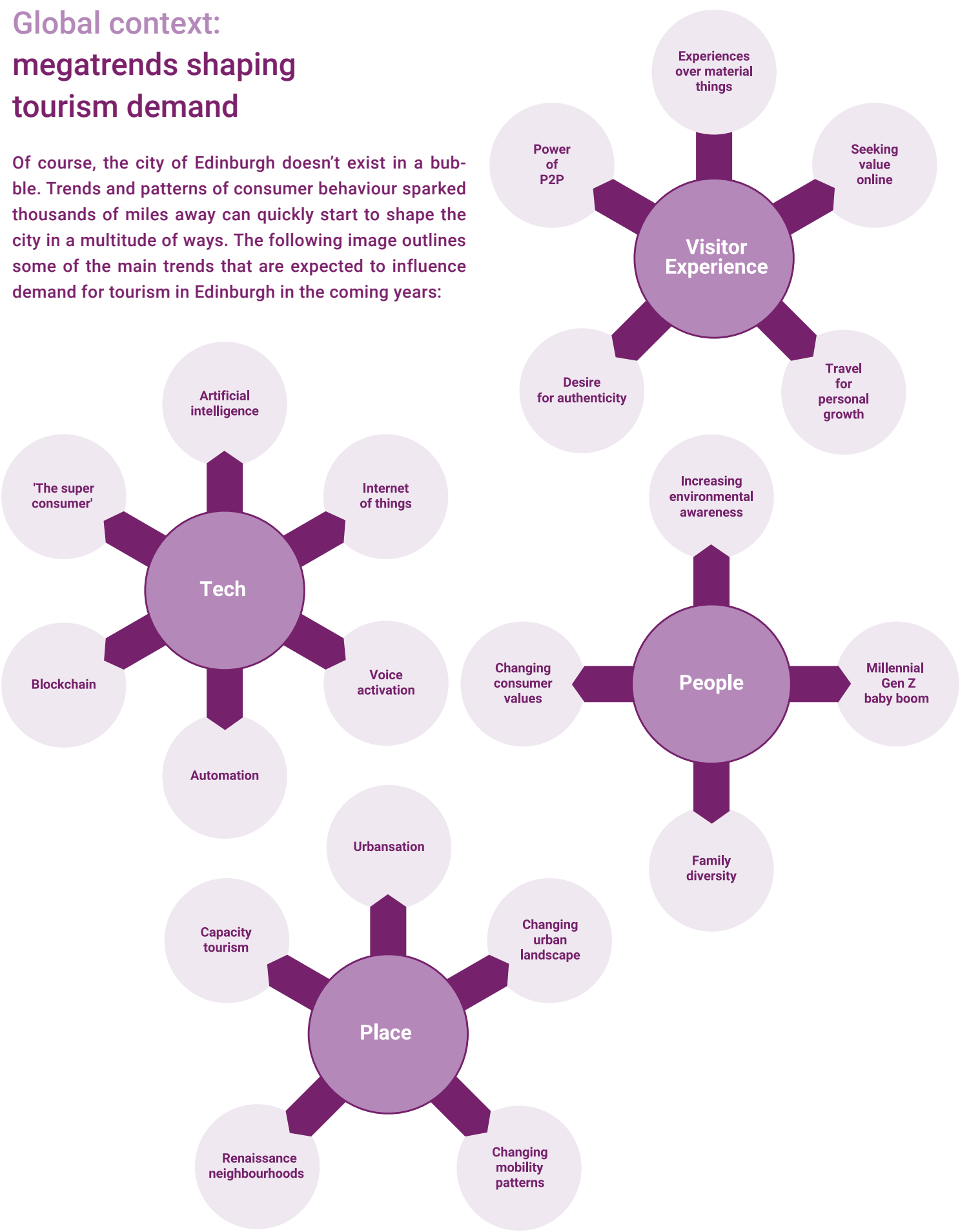
A defining trend:
tourism growth

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.

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:

Visitor Experience
- Experiences over material things
- Power of P2P
- Seeking value online
- Desire for authenticity
- Travel for personal growth

Tech
- Artificial intelligence
- 'The super consumer'
- Internet of things
- Blockchain
- Voice activation
- Automation

People
- Increasing environmental awareness
- Changing consumer values
- Millennial Gen Z baby boom
- Family diversity

Place
- Urbansation
- Capacity tourism
- Changing urban landscape
- Renaissance neighbourhoods
- Changing mobility patterns

Tourism
in a changing city

'Edinburgh is many different things to different people, but it is primarily a home; a home to over 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 to 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 4.54 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 as a gateway city to ensure that the wider city region and Scotland as a whole benefit from the city's success.

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, impacting on business viability and the opportunity for the sector to create more, and better quality, full time, permanent jobs. Targeting lower volume, but high value visitors such as business events delegates during the quieter periods can help to address this.

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.

A successful tourism sector working for a successful city

Today, tourism is an integral part of Edinburgh's thriving economy. Visitor spending represents an important source of external investment to the city, directly supporting over 33,000 jobs and a wide array of businesses.
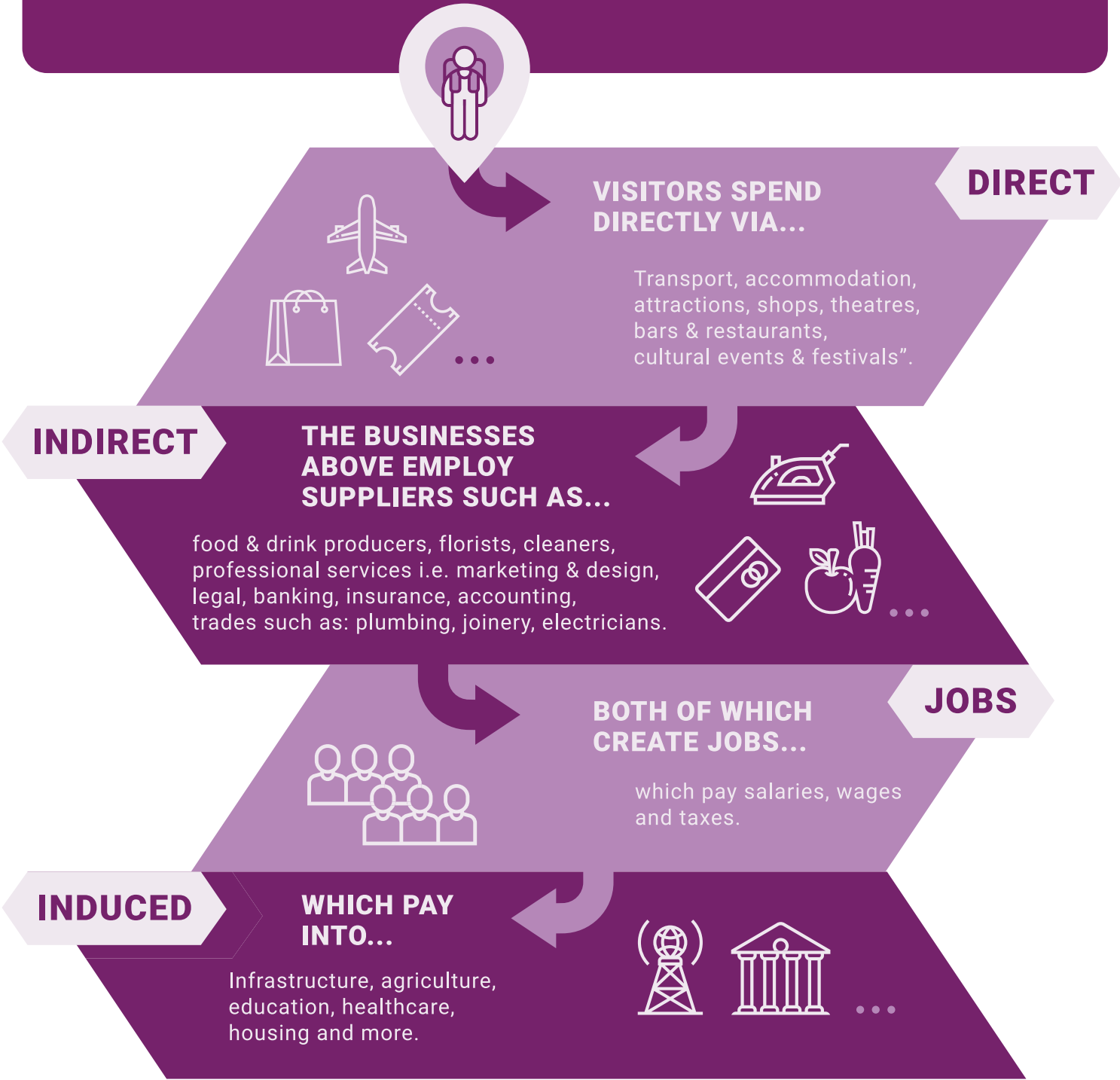
The success of Edinburgh's tourism sector has also ensured that many of the city's prominent historic buildings have been restored, refurbished and redeveloped, protecting them for future generations.

Visitors to Edinburgh also support a broad range of cultural venues and events throughout the year, which offers world-class cultural opportunities for residents both in Edinburgh and across the whole of Scotland, supporting Scotland's creative economy, as well as positioning Edinburgh on the international stage.

Tourism's success can generate
a chain of benefits for the city:

- Thriving visitor economy
- More & better jobs
- Ongoing investment in the city
- Reduced unemployment, poverty & inequality
- Better quality of life

Since 2010, tourism in Edinburgh has performed strongly against a backdrop of continuing economic recovery in the city's main markets across the UK, Europe and US. The national tourism surveys show significant growth in the city, with a 54% increase in overseas visitors and a 29% increase in domestic visitors. Total tourism expenditure has grown by over 50% in real terms since 2010 supporting an additional 9700 jobs in the city.

VISITORS SPEND DIRECTLY VIA...

DIRECT

Transport, accommodation, attractions, shops, theatres, bars & restaurants, cultural events & festivals".

INDIRECT

THE BUSINESSES ABOVE EMPLOY SUPPLIERS SUCH AS...

food & drink producers, florists, cleaners, professional services i.e. marketing & design, legal, banking, insurance, accounting, trades such as: plumbing, joinery, electricians.

BOTH OF WHICH CREATE JOBS...

JOBS

which pay salaries, wages and taxes.

INDUCED

WHICH PAY INTO...

Infrastructure, agriculture, education, healthcare, housing and more.

Reference: Adapted from WTTC (2019) 'HOW MONEY TRAVELS: THE DIRECT, INDIRECT, AND INDUCED EFFECT OF TOURISM SPENDING'

Photo by Adli Wahid on Unsplash

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; transport connections are improving, 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 a 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?"
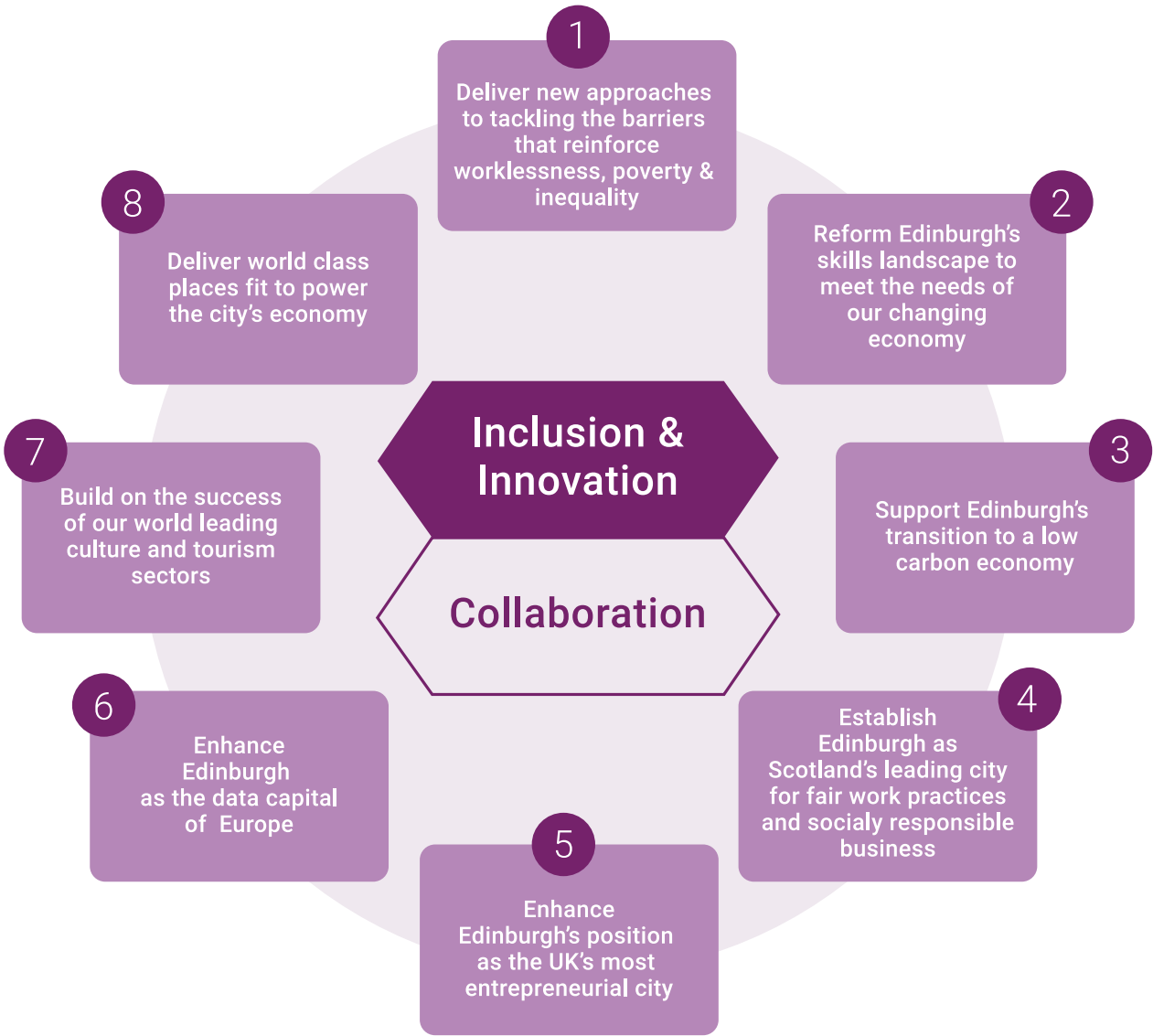
Helping to meet the city's long-term ambitions

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, and to reduce its burden on the city?

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 follo hat together, they can enable good growth.

1. Deliver new approaches to tackling the barriers that reinforce worklessness, poverty & inequality
2. Reform Edinburgh's skills landscape to meet the needs of our changing economy
3. Support Edinburgh's transition to a low carbon economy
4. Establish Edinburgh as Scotland's leading city for fair work practices and socialy responsible business
5. Enhance Edinburgh's position as the UK's most entrepreneurial city
6. Enhance Edinburgh as the data capital of Europe
7. Build on the success of our world leading culture and tourism sectors
8. Deliver world class places fit to power the city's economy

Inclusion & Innovation

Collaboration

12

13

This document has been prepared by TOPOSOPHY Ltd, on behalf of the Edinburgh Tourism Strategy Implementation Group.

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. When residents have a good quality of life, and the built and natural environment is respected and protected, everybody benefits. Developing attractive spaces in and around Edinburgh means preserving and nurturing our outstanding world heritage and contemporary cultural offer, 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 built heritage and natural environment 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 the wider City Region are developed and easy to reach by public transport

Place: Principal Recommendations

The tourism sector should take a more active role in supporting the 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.

There is a shared desire that 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 for local residents.

Edinburgh should be at the forefront of using new technology and data-driven solutions to manage the impacts of tourism more effectively, for example 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 carefully managed and aligned with the City of Edinburgh Council's Locality Improvement Plans (LIPs), which reflect the needs of that specific locality.

Edinburgh should strive to be an exemplar city in the delivery of accessible tourism.

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 for those who call the city home

- Tourism developments in the city's neighbourhoods should provide benefits for local residents, such as new employment opportunities, amenity improvements and better services

People: Principal Recommendations

Residents should be consulted on tourism-related developments, for example, when Locality Improvement Plans 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 visits to museums and galleries

Communicate with residents and visitors in order to identify and tackle nuisance issues. This should involve relevant tourism suppliers where appropriate

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 / resident sentiment around tourism in the city

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's transition to net zero carbon emissions by 2030

- 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 that contributes to the City of Edinburgh Council's ambition for the city to transition to net-zero carbon emissions by 2030

Edinburgh's tourism sector should seek to measure its overall burden on the natural and built environment and put in place plans to mitigate this

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

Ensure that visitor spending is retained within the local economy as much as possible, by promoting sourcing through local suppliers and actively supporting initiatives which promote platforms to showcase and sell Scottish-made products

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.

Action should be taken to help visitors to reduce the environmental impact of their visit

Tourism sector stakeholders should work together to co-design enhanced solutions for reducing the impact of tourism-related traffic

Potential indicators for success:

- Reduced carbon emissions related to tourism activity in Edinburgh

- Reduction of waste produced by tourism businesses

- Reduction tourism-related traffic in the city

- Increase in tourism-related developments that adhere to high environmental standards

- Increased percentage of Scottish-made goods used by and available through the tourism sector

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 City of Edinburgh Council's Economic Strategy Enablers of Good Growth (outlined earlier in this Strategy). The city should build on its existing strong network of industry and stakeholder partnerships, and seek to extend these, to include residents, in particular. As a result, nurturing partnerships will 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

- Tourism continues to develop a well-integrated, collaborative and effective network of partnerships to deliver the strategy

- 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

- A new model is developed to promote effective dialogue between local residents and tourism stakeholders, in order to address specific challenges and deliver this strategy

Partnerships: Principal Recommendations

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 related to the ambitions set out in this strategy They should be aimed at 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

Strengthen partnerships throughout the tourism supply chain to ensure that as much benefit as possible is retained within Scotland

Support tourism businesses to: drive innovation in product and service development, improve visitor experiences, improve productivity to enhance business viability, and create better opportunities for fair work

Partners should actively work together to encourage year-round sustainable tourism, with a particular focus on lower-volume, higher-value visitors, such as business tourism delegates

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 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

- Residents are proud of their city; visitors feel welcome and highly satisfied with the quality of their visit to the city

- 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)

Develop new mechanisms to ensure that residents have the opportunity to be more informed and engaged in the delivery of this strategy

Manage tourism and engage with residents to ensure that the social and cultural benefits of tourism in the city are more widely recognised and accessible

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

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, contemporary European capital city with all the attributes and experiences that this implies

Potential indicators for success:

- 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

Edinburgh's 2030 Tourism Strategy sets out a new approach to managing tourism across the city and the overarching priorities, ambitions and recommendations for the next 10 years. The first step in the delivery of the strategy is the development of the associated, and far more detailed, 3-year Action Plan. This will identify the key actions and agree, source and commit the resources required to realise the ambitions of the strategy.

It will also be essential to consider the leadership and governance of the strategy overall, as well as the management and delivery structures required to implement the Action Plan.

Next Steps:

Review the city's current tourism leadership, governance and delivery mechanisms to assess if they are "fit for purpose" and where necessary adapt them to meet the requirements of the new Strategy.

Develop the 3-year Action Plan for the delivery of the strategy.

Establish appropriate SMART objectives, KPIs and a management and performance monitoring model.

Identify and develop appropriate new mechanisms to ensure effective resident engagement.

Establish the appropriate channels and mechanisms to engage with international, national and regional partners, as well as other sectors of the economy

Integration of the tourism strategy with wider city, regional and national strategies and policies

Acknowlegements

TO BE ADDED WITH FINAL STRATEGY DESIGN

Photo by Jonathan Ricci on Unsplash

City of Edinburgh Council 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. Our built and natural assets are a unique blend, and the city's 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 their success. However, there is a tendency for jobs in the sector to be relatively low paid and low skilled. And 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, quality of life for residents, and ensuring a manageable impact of the sector on the city's infrastructure, our wider social and historic fabric, and on the 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	• Edinburgh's heritage is cherished and cared for as a fundamental aspect of the city's character.	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.	Planning
	• Edinburgh retains its authenticity as a "living, working" city with a reasonable balance between tourism and other aspects of economic activity.	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.	Planning Transport Economic Development
	• New tourism developments in the city will contribute to the quality of life for local people.	Research should be carried out to identify which spaces are liable to crowding and these should be prioritised for enhanced management.	Culture Transport
	• 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.	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.	Regulatory Planning
		Technology and data driven solutions should be introduced to improve visitor capacity management in public spaces, visitor attractions and during peak periods.	Economic Development
		Building use should be monitored, and where appropriate, measures taken to seek a balance of uses that respond to the needs of the city.	Planning
		Extending tourism's footprint into local neighbourhoods should be aligned with the City of Edinburgh Council's Locality Improvement Plans (LIPs).	Culture Localities
		Edinburgh should work to improve connectivity to and around the city, including seamless, integrated transport.	Transport

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
		The Council should consider the night-life economy when taking decisions about transport and development in order to ensure that venues in Edinburgh, particularly live music venues, can thrive.	Planning Transport Culture
Our People	• 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).	Economic Development 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.	Economic Development
		Ensure that business leaders have the right skills to operate responsible and efficient tourism businesses.	Economic Development
		Help businesses to stay up to date with regulations that relate to workforce management e.g. related to migration, work permits, health and safety).	Economic Development
		Assist businesses in planning and preparing for long-term changes in skills requirements such as automation, digitalisation).	Economic Development

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
		Ensure that Edinburgh's tourism workforce has the right skills (especially digital) to ensure that they meet the needs consumers' evolving needs.	Economic Development

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our Environment	• 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.	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.	Strategy & Communications Culture
		Edinburgh's tourism sector should seek to measure its overall "invisible burden" and put in place plans to mitigate this wherever possible.	Strategy & Communications
		Edinburgh's tourism sector should actively explore opportunities to minimise waste and optimise use of existing resources through developments in the circular economy.	Waste & Cleansing Culture
		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.	Planning
		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.	Culture Strategy & Communications
		Tourism sector stakeholders should work together to co-design enhanced solutions for reducing traffic related impacts generated through the servicing of the tourism sector.	Transport
Our Partnerships	• 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 structure, funding and organisational model for tourism leadership, governance and delivery in Edinburgh should be based around the requirements of this strategy	Strategy & Communications
		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	Strategy & Communications
		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	Strategy & Communications

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
	• 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	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.	Strategy & Communications
		Work in partnership to ensure the right conditions for a thriving, responsible, sustainable economy.	Economic Development
		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.	Economic Development
		Partners should actively work together to encourage year-round tourism, recognising the need to offer new reasons to visit during quieter periods.	Culture Economic Development
		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.	Economic Development
		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.	Transport
		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.	Strategy & Communications

Priorities for Action	Ambitions	Principal Recommendations	Contributing Council Service
Our Reputation	• 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	Understand the issues and ambitions that are important to the people of Edinburgh (for example, through the Edinburgh 2050 Vision programme)	Strategy & Communications
		Ensure that tourism in the city is widely supported by its residents who are proud of the city and welcoming to visitors	Strategy & Communications
		The city should focus on place-based reputation management, by providing an optimal living environment for residents and a high-quality visitor experience	Planning Transport
		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	Economic Development
		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	Strategy & Communications Economic Development
		Ensure that Edinburgh's ambition to achieve the goals of this strategy is clearly understood inside and outside the city	Strategy & Communications
		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	Economic Development
		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	Economic Development
		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.	Strategy & Communications Economic Development