



Insight Department:
Edinburgh and Lothians Factsheet | 2019

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 Visit
Scotland | Alba™



Introduction

Background Information and Aim

This report provides a summary of statistics on tourism in Scotland's Edinburgh and Lothians region. It gathers information from a suite of tourism monitors managed by VisitScotland's Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey (GBTS)** that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey (IPS)** which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
Please note: In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey (GBDVS)** that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey (SAOS)** that provides data on occupancy in Scotland's tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution. To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as purpose of travel, seasonality and average duration of trips.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Both international and domestic visitor figures are reported at Edinburgh and Lothians regional level to allow for summing of figures and comparative analysis. Domestic figures are also available at local authority level, and these have been provided in addition where sample size allows. International data is only available for Edinburgh and Lothians as a whole, and partially for the Lothians combined (East Lothian, Midlothian and West Lothian) and the City of Edinburgh.

This report starts with an **overall** evaluation of Edinburgh and Lothians tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region and, if figures allow, provides sub-regional or council area breakdown. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

Sources

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

I. Tourism in Edinburgh & Lothians

Latest Figures

Tantallon Castle, East Lothian
© 2020 VisitScotland / Kenny Lam

Overall Tourism Summary: Visits, Nights and Spend in Edinburgh and Lothians, 2019

VISITS BREAKDOWN	Visits		Nights		Spend	
	000s	% Change 2018/19	000s	% Change 2018/19	£m	% Change 2018/19
Europe	1,150	-22%	5,356	-16%	453	-22%
North America	534	+10%	2,482	+15%	407	+67%
Rest of World	605	-4%	4,993	+55%	388	+4%
Total International Overnight	2,289	-12%	12,831	+9%	1,249	+4%
Scotland	1,191	+25%	2,566	+43%	232	+41%
Rest of Great Britain	1,869	-1%	5,321	-1%	499	-14%
Total Domestic Overnight	3,059	+8%	7,887	+10%	731	-2%
Total Overnight Tourism	5,348	-1%	20,718	+9%	1,980	+2%
Total Day Tourism	24,786	-16%	N/A	N/A	1,306	-18%
Grand Total	30,134	-14%	20,718	+9%	3,286	-7%

Sources: IPS/GBTS/GBDVS, 2019. Figures may not sum up due to rounding.

National figures are available in the *Key Facts on Tourism in Scotland 2019* report published on visitscotland.org.

Visitors to Edinburgh & Lothians

Tourism Performance | 2019

In 2019, Edinburgh and Lothians was the **most popular** Scottish region to visit for both domestic and international travellers. It accounted for **31% of all overnight visits** and **34% of the total overnight tourism expenditure** on national level.

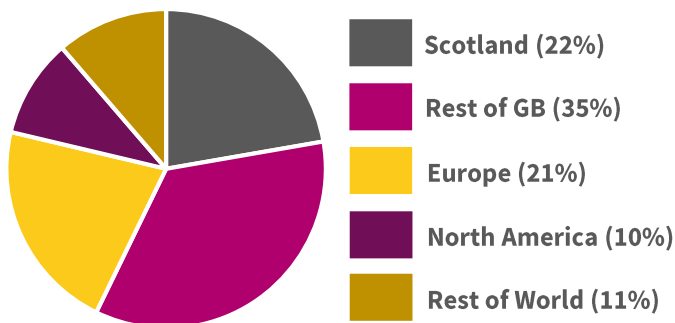
At 5.3 million, overnight trips were 1% fewer than in 2018. Yet, total overnight spend (£2 billion) and the number of bednights (20.7 million) both grew in 2019, by 2% and 9%, respectively.

The rise in overnight spend was driven by **international visitors** who spent roughly £50 million more in Edinburgh and Lothians in 2019. Indeed, overseas residents remained essential for the region’s tourism performance, accounting for 43% of all overnight trips and 63% of all overnight spend – the **highest shares among all of Scotland’s regions**. Nevertheless, the importance of the domestic market for Edinburgh and Lothians continued to grow in 2019. In particular, there were notable increases in **Scotland residents’** overnight trips (+25%) and spend (+41%) in the region which reached record-high levels.

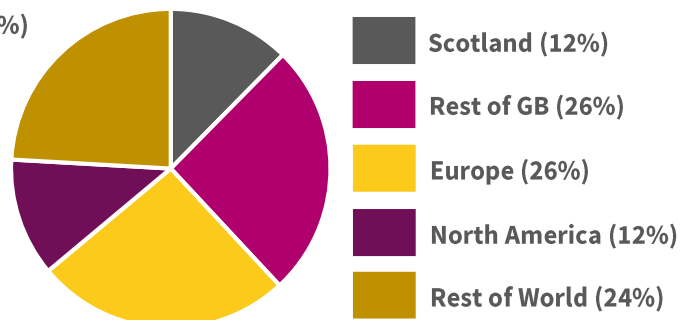
2019 witnessed some changes to Edinburgh and Lothians’ visitor mix, with **Scottish** and **North American** visitors increasing, and Continental Europe residents decreasing in numbers. Trips by English and Welsh travellers remained largely unchanged.

Figures indicate a roughly one-sixth **decrease in domestic day tourism** to Edinburgh and Lothians from 2018. Despite this, day tourism spend was the second highest between 2015 and 2019.

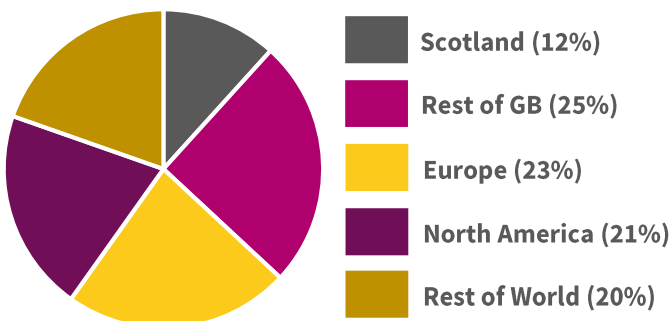
Overnight Visits



Nights



Overnight Spend



Sources: GBTS/IPS, 2019. Figures may not sum up due to rounding.

Regional Tourism Performance

Local Statistics

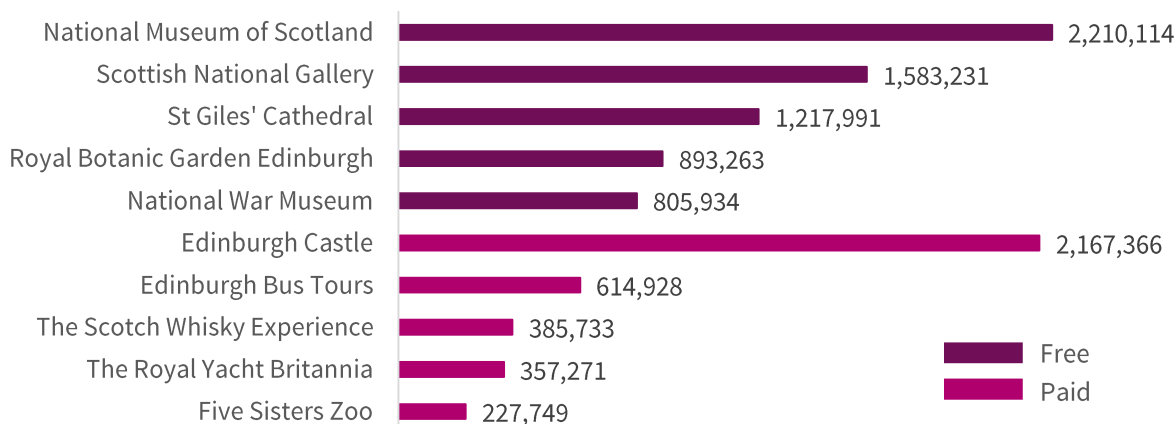
Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
City of Edinburgh	2,415	+4%	36.3	+9%	815.8	+13%
East Lothian	294	+4%	3.7	+9%	51.4	-38%
Midlothian	207	0%	2.0	+11%	26.0	-43%
West Lothian	377	+1%	3.8	+6%	54.6	-24%
Edinburgh and Lothians	3,293	+4%	45.8	+9%	947.8	+3%

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.

*The Scottish Government defines sustainable tourism as a growth sector including a number of business types [detailed on their website](#). Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Edinburgh & Lothians (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.

VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Edinburgh and Lothians Occupancy Rates by Accommodation Type and Month, 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Hotel (Room Occ.)	45%	60%	69%	75%	80%	87%	88%	85%	87%	76%	69%	70%	74%
Guest House/B&B (Room Occ.)	89%	71%	73%	89%	77%	65%	74%	96%	98%	69%	94%	95%	82%
Self-Catering (Unit Occ.)	16%	22%	21%	41%	45%	54%	53%	61%	35%	35%	30%	29%	37%
Hostel (Bed Occ.)	26%	45%	56%	67%	78%	87%	90%	75%	68%	65%	40%	34%	72%

Source: SAOS, 2019.

II. International Visitors to Edinburgh & Lothians Overnight Tourism

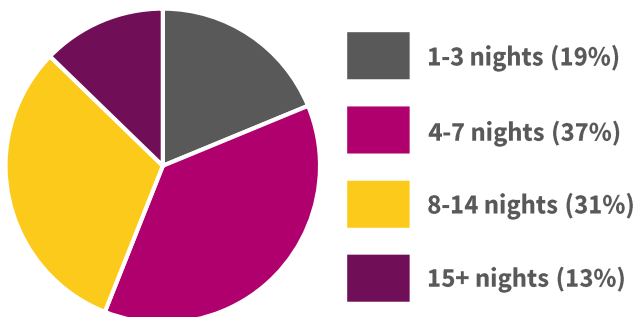
International travellers visited Edinburgh and Lothians **2.3 million** times in 2019, which means that the region was either the main destination or part of a wider journey for **two in three** international visits to Scotland. While trips were 12% down from 2018, international **bednights and spend** in the region were the **highest on record**. This was result of a 23% increase in the average length of stay that also led to an 18% rise in the average spend per trip. Overseas residents prefer to visit Edinburgh and Lothians in the warmer months; still, the biggest increase in travel was observed between October and December. **Holidaying** remained the main reason to visit the region, while VFR trips dropped by a third from 2018.

National and Regional International Tourism Performance, 2019

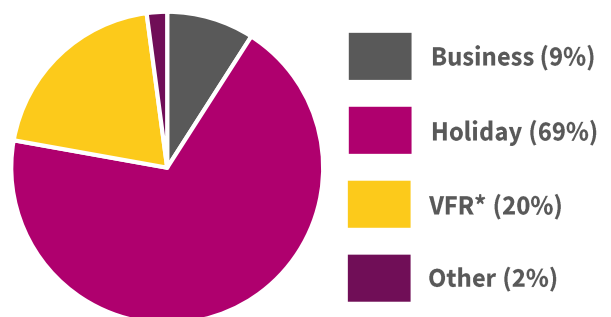
Indicators	Scotland		Edinburgh & Lothians		Edinburgh		Lothians*	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	3,460	-7%	2,289	-12%	2,206	-12%	88	+14%
Spend (£M)	2,538	+7%	1,249	+4%	1,191	+1%	58	+117%
Nights (000s)	27,385	+8%	12,831	+9%	12,412	+10%	419	-17%
Average length of stay	7.9 nights	+16%	5.6 nights	+23%	5.6 nights	+25%	4.8 nights	-28%
Average spend per day	£93	0%	£97	-5%	£96	-8%	£138	+162%
Average spend per visit	£734	+15%	£545	+18%	£540	+16%	£656	+90%

Source: IPS, 2019. *Lothians figures are based on relatively low sample sizes.

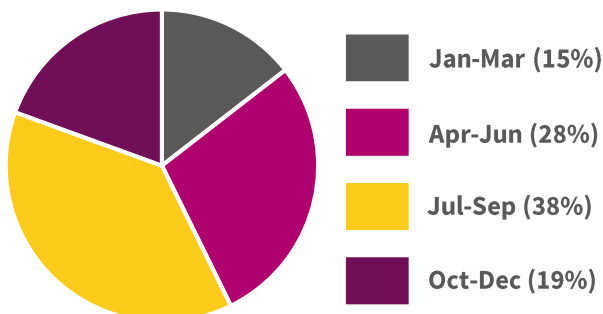
Duration of Stay



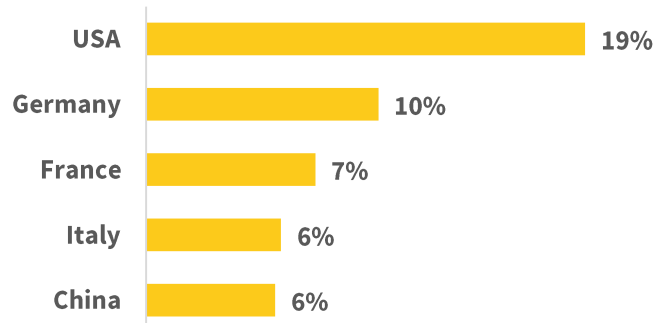
Purpose of Travel



Seasonality



Top 5 Overseas Markets



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Edinburgh and Lothians. VFR = Visiting friends or relatives.

III. Domestic Visitors to Edinburgh & Lothians

Overnight Tourism

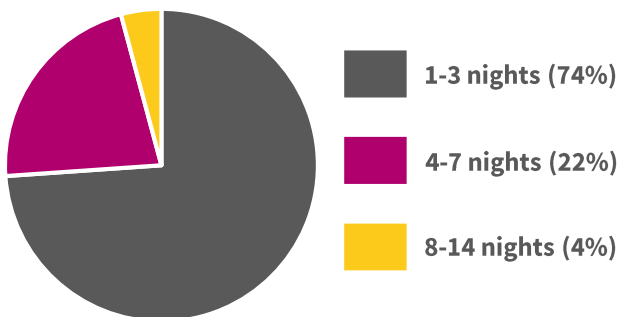
In 2019, British residents made **3.1 million** overnight trips to Edinburgh and Lothians, spending 7.9 million nights and £731 million. While the number of **visits and bednights** both **increased** from 2018, the rise in domestic tourism to the region did not match the notable growth observed on national level. This was mostly due to the high proportion of English travellers – undertaking 59% of the domestic visits to Edinburgh and Lothians – who made slightly more trips but spent less money in 2019. Nevertheless, Edinburgh and Lothians attracted **22% of the visits** and **23% of the total domestic overnight spend in Scotland**.

Domestic Overnight Tourism, 2019

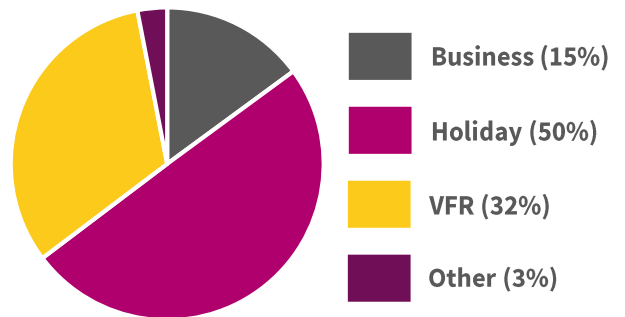
Indicators	Scotland		Edinburgh & Lothians		Edinburgh		Lothians	
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19
Visits (000s)	13,810	+17%	3,059	+8%	2,697	+7%	362	+11%
Spend (£M)	3,200	+16%	731	-2%	674	-1%	57	-11%
Nights (000s)	46,413	+15%	7,887	+10%	6,837	+8%	1,049	+22%
Average length of stay	3.4 nights	-2%	2.6 nights	+2%	2.5 nights	+1%	2.9 nights	+10%
Average spend per day	£69	+1%	£93	-11%	£99	-8%	£54	-27%
Average spend per visit	£232	-1%	£239	-9%	£250	-8%	£157	-20%

Source: GBTS, 2019.

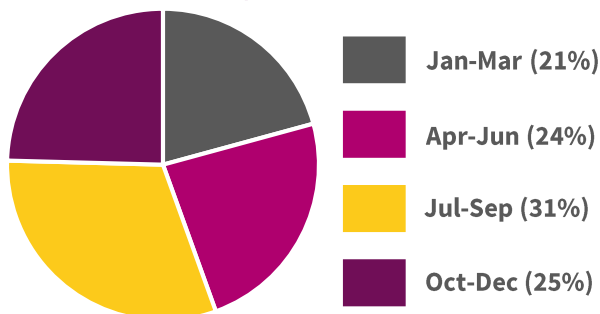
Duration of Stay



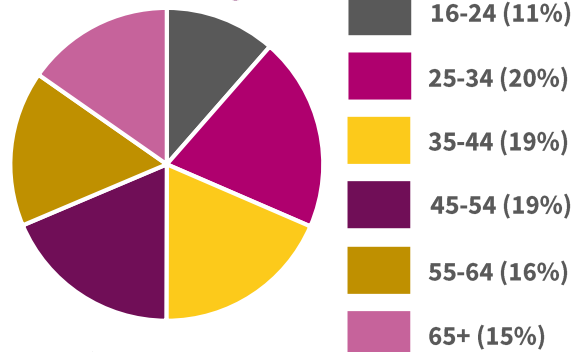
Purpose of Travel



Seasonality



Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Edinburgh and Lothians. Figures may not sum up due to rounding.

Domestic Day Visits to Edinburgh & Lothians

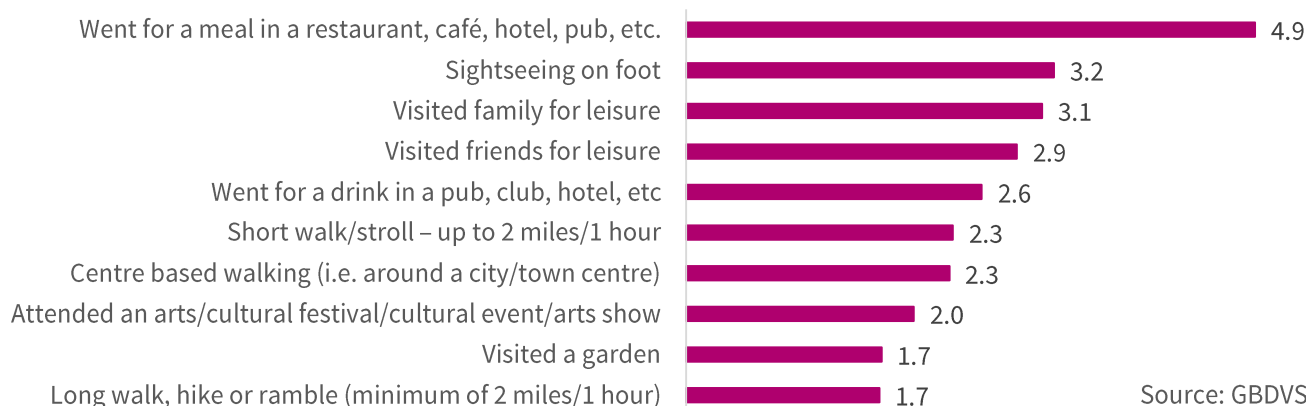
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Edinburgh and Lothians	27.9	-4%	1,351	+3%
Edinburgh	19.7	-5%	1,168	+3%
Lothians	8.2	-1%	183	+7%

Source: GBDVS. Figures may not sum up due to rounding.

Most Popular Activities Undertaken as Part of a Day Trip, Edinburgh and Lothians: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



Source: GBDVS.



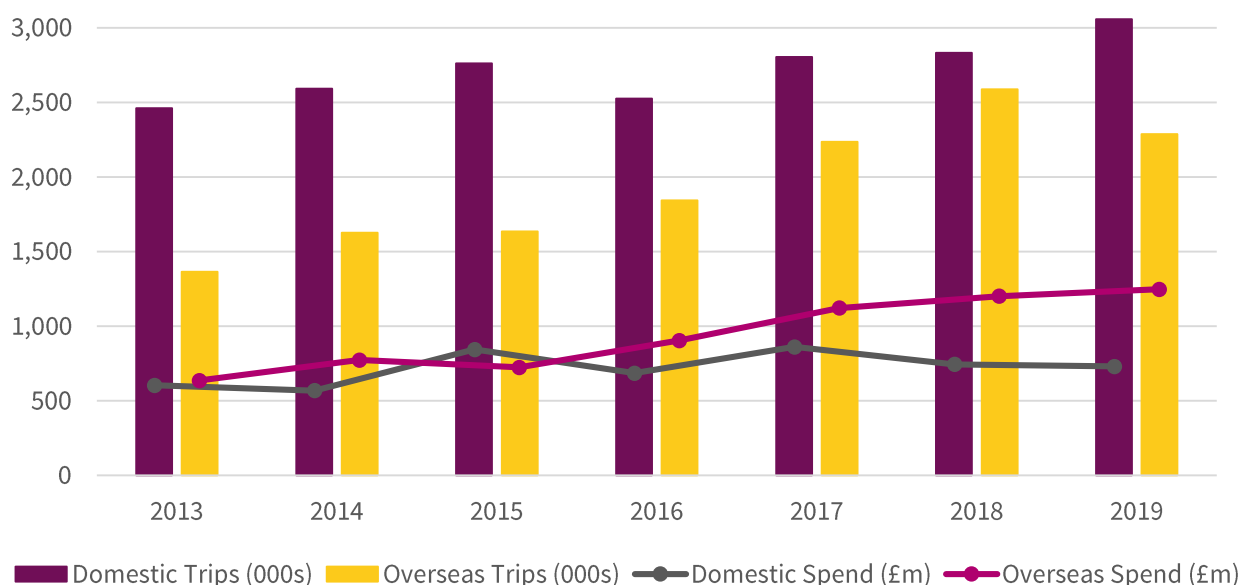
Red Deer at Beechcraigs Country Park, West Lothian
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Visitors to Edinburgh & Lothians

Historical Trend Information | 2013 - 2019

In 2019, the total **overnight number of trips and tourism expenditure** in Edinburgh and Lothians were the **second highest on record**. The significance of international tourism in the region is great and in recent years the rise of overseas visitors has exceeded the growth of the domestic market. However, British residents also show increased interest in travelling to Edinburgh and the Lothians, with domestic trips **increasing by 10%** from 2014-2016 to 2017-2019. International visits **rose by 39%** over the same period, yet 2019 was the first year in which international travel declined since 2012.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	2,463	2,594	2,762	2,527	2,805	2,833	3,059
International (000s)	1,366	1,627	1,635	1,844	2,236	2,588	2,289
Total Overnight (000s)	3,829	4,221	4,397	4,371	5,041	5,421	5,348

Sources: GBTS, IPS.

Domestic and International Overnight Spend, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	604	569	845	686	862	745	731
International (£m)	637	774	724	904	1,123	1,201	1,249
Total Overnight (£m)	1,241	1,343	1,569	1,590	1,985	1,946	1,980

Sources: GBTS, IPS.



Appendix

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre's Scottish Visitor Attraction Monitor (VAM) and ONS' Scottish Annual Business Survey (SABS).

SAMPLE SIZES

Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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Front Cover: The Royal Botanic Garden, Edinburgh

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Back Cover: Dean Village

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