

ECONOMIC IMPACT - WINTER FESTIVALS

BOP Consulting was commissioned to undertake an **Economic Impact study** of **Edinburgh's Christmas 2017**.

The key information sources for the study were an assisted on-site survey completed by 1,512 attendees of Edinburgh's Christmas, and quantitative management and box office information.

The analysis assesses the contribution made by Edinburgh's Christmas to Full-Time Equivalent (FTE) employment and additional output, at the geographic levels of both Edinburgh and Scotland.

The calculated economic impact of Edinburgh's Christmas on Edinburgh 2017 was **£113.2m** in terms of additional output; and the impact on Scotland in these terms was **£88.2m**.

In terms of employment, the calculated economic impact equates to **2,260 full time jobs** in both Edinburgh and Scotland.

The **economic impact** of **Edinburgh's Hogmanay** was measured by BOP Consulting in 2017/18 and generated **£39.2m** for the city, equating to 826 FTE. The economic impact created for Scotland was **£39.8m**, equating to 920 FTE.



Sources:

BOP Consulting: Edinburgh's Christmas 2017 Impact Study
BOP Consulting: Edinburgh's Hogmanay 2017/18 Impact Study
Edinburgh's Christmas Ticketing Survey
Essential Edinburgh - Edinburgh's Christmas 2017 Evaluation
BOP Consulting Survey - Edinburgh Festivals 2015 Impact Study



EDINBURGH'S CHRISTMAS 2017 KEY FACTS

UNIQUE VISITORS
919,344

TICKETS ISSUED
771,007

EH DISCOUNT TICKETS ISSUED
142,333

ECONOMIC IMPACT ON EDINBURGH
£113.2M

FULL TIME JOB EQUIVALENCY
2,260

SATISFACTION
98%
GOOD OR VERY GOOD

OVERVIEW

2017 marked the fifth year of Underbelly producing Edinburgh's Christmas for the City of Edinburgh Council. With attractions over four city centre locations as well as in local communities, it was their biggest and best Christmas to date.

Edinburgh's **Giant Advent Calendar**, a free outdoor attraction counted down the days on General Register House.

On George Street, alongside **Santa's Grotto**, **The Ice Adventure: A Journey Through Frozen Scotland** attracted crowds to admire over 200 ice sculptures charting Scottish history and mythology.

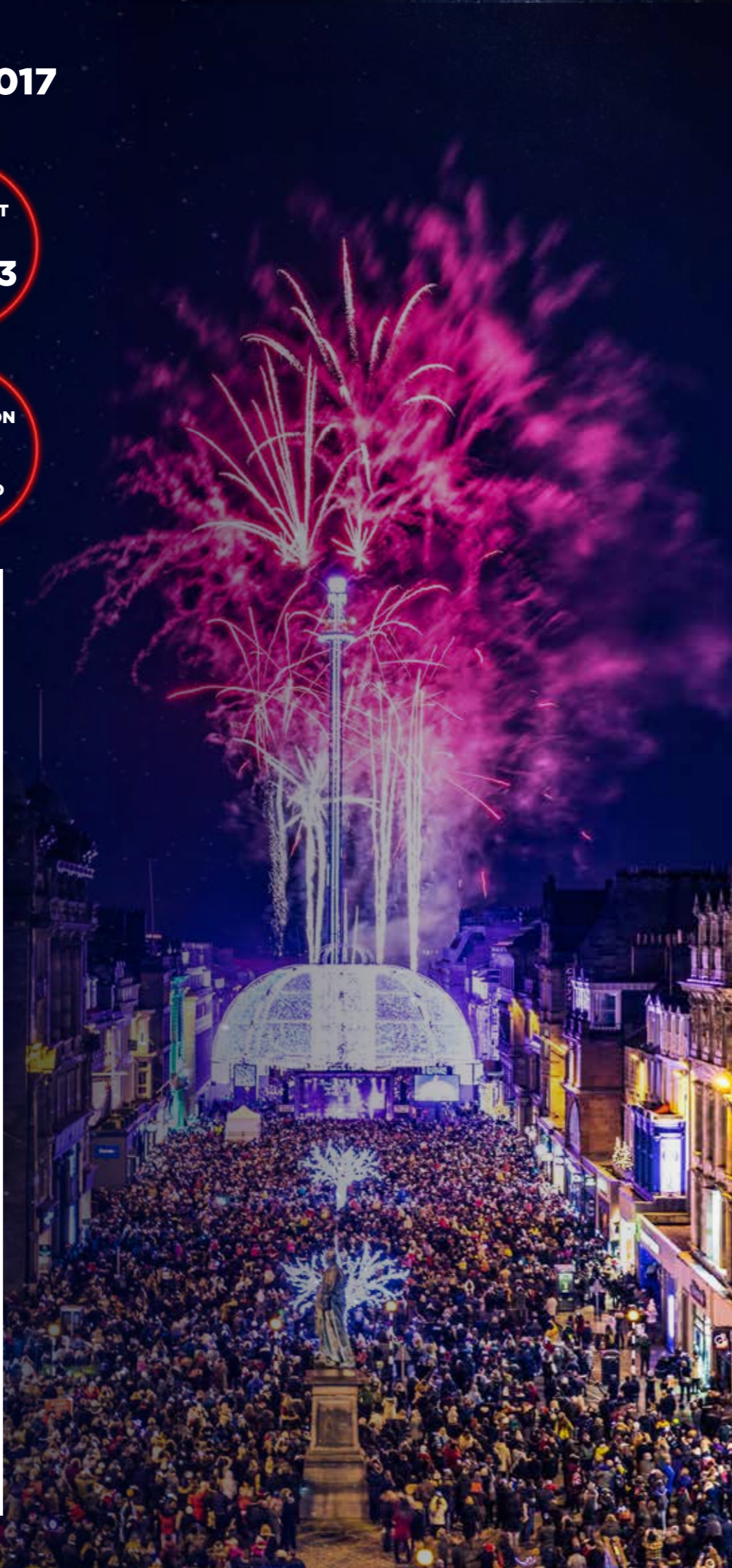
In Festival Square, the Spiegeltent hosted **La Clique Noël**, a specially curated festive version of Edinburgh's favourite, outrageous and unforgettable cabaret show that started at the Edinburgh Fringe in 2003.

East Princes Street Gardens remained a centre point for families with **Santa Land**, the ever-popular **Christmas Markets** and familiar rides such as the **Star Flyer** and the **Forth One Big Wheel**.

The **elliptical ice rink** returned to St Andrew Square.

1,290 schoolchildren from **33** schools across Edinburgh designed stained glass windows throughout the autumn term on the theme of the 2050 Edinburgh City Vision. 44 winning entries were picked and enlarged into **"Winter Windows"** and displayed in five locations around Edinburgh - West Parliament Square, Leith's Kirkgate Plaza, Craigmillar Library, Drumbrae Library and Westside Plaza, Westerhailes.

An estimated audience of **15,000** came together for **Light Night**, a celebration of Edinburgh's community spirit and the traditional start to the city's Christmas celebrations. Forth 1 Breakfast presenter Arlene Stuart, was joined by Edinburgh's Lord Provost Frank Ross, and the star of BBC's Call the Midwife and Shrek the Musical, Laura Main to mark the beginning of Edinburgh's Christmas and the switch on of the city's lights and a stunning fireworks display.



SIZE AND SCALE OF EDINBURGH'S CHRISTMAS

Edinburgh's Christmas attracted **919,344 unique visitors** over 6 weeks in 2017, (up 3.7% from 886,651 in 2015) demonstrating the scale of Edinburgh's Christmas when compared to the combined 1,070,954 unique attendees counted at Edinburgh's 12 festivals (BOP Consulting Edinburgh Festivals 2015 Impact Study).

Footfall to Edinburgh's Christmas three main sites was counted at **4.653 million** and City Centre footfall was counted at 20.7 million for the November & December period (Essential Edinburgh).

Edinburgh's retail sales from 2015 to 2017 **grew 3.1%** during the Edinburgh's Christmas period of November and December, bucking the average Scottish trend (-0.2%) and the UK trend (1.3%).

A record-breaking **771,007 tickets** were snapped up for Edinburgh's Christmas rides, attractions and shows: a **11.6% increase** on 2016's 690,878 tickets sold.

And Edinburgh's Christmas once again demonstrated its very loyal local following with **EH postcode holders booking 142,333 tickets** with their 20% discount (up 9% on 2016).

WHO ARE THE ATTENDEES?



WHY DID PEOPLE VISIT?

Edinburgh's Christmas is a major draw for people to come to Edinburgh and Scotland and has enormous value in helping to generate the city's and the country's global profile as a winter destination. This is demonstrated by:

- 64% of attendees travelling from outside of Edinburgh said Edinburgh's Christmas was their main or only reason for visiting Edinburgh that day;
- And 46% of attendees travelling from outside of Scotland said Edinburgh's Christmas was their main or only reason for visiting Scotland that day.
- The Christmas Markets at Edinburgh's Christmas are the biggest draw to the event with 66% saying it was their main reason for visiting.

Attendees visited an average of 2.9 paid attractions and the Ice Rink was the next most popular attraction with 21% saying it was their main reason for visiting.

Edinburgh's Christmas's East Princes Street Gardens Christmas Market was named as the best in UK (in a survey conducted by McCarthy & Stone).

QUALITY OF EXPERIENCE

98% of people surveyed rated the quality of their experience at Edinburgh's Christmas as **very good or good** (76% very good).

71% of people surveyed had visited Edinburgh's Christmas in previous years (on an average of 6.6 times demonstrating a consistently positive visitor experience to Edinburgh's Christmas).

92% of attendees from Edinburgh and the Lothians had visited before (on an average of 7.7 times)

