

# Scottish Enterprise

## **Tourism Economic Impact Assessment of the UK Giant Panda Project**



### What our client wanted

In 2011, Edinburgh became one of only 14 cities in the world outside of China, to host Giant Pandas, and the smallest 'panda city' in the world. The giant Panda project provided an opportunity to support the tourism economies of Edinburgh and Scotland by attracting new visitors to the city, and by encouraging them to buy goods and services from Scottish businesses as part of their visit. Scottish Enterprise were keen to understand the potential impact that hosting the pandas would have on tourism in Scotland and commissioned Frontline to conduct an economic impact assessment of the project.

### What Frontline did

Our assessment examined the scale of the opportunity by developing a series of estimates of potential impacts based on three scenarios:

- base case scenario: which assumed that the project went ahead, but that there was no additional activity beyond the zoo itself
- limited impact scenario: which assumed that the benefits of the project were leveraged through limited additional activity delivered through individual, ad hoc activities by individual businesses and agencies
- panda premium scenario: where there is was a concerted, co-ordinated effort by a range of partners to fully exploit the visitor growth potential of the pandas

To support the development of the scenarios a review of relevant literature was conducted and mapped against key questions identified in an issues tree and key UK and international stakeholders were consulted to identify any gaps and build on the review

### What difference we made

Our assessment identified a number of good practice examples from others that the zoo and its partners could follow to optimise the impact of the pandas. It also provided Scottish Enterprise with a number of recommendations on how the panda project could be used to encourage tourism to Edinburgh and Scotland.