



East Lothian
Council

East Lothian Visitor Statistics & Insights

Key Figures

In partnership with



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Welcome

Tourism is vital to East Lothian's economy employing around 10% of the total workforce and generating circa £110 million into the local economy.¹

The destination has a diverse tourism product which includes traditional seaside towns, pristine coastline as well as inland historic villages and towns and countryside locations.

Based on current research conducted by STR, East Lothian is well-placed to capitalise on COVID-19 related tourism trends as visitors seek more outdoor experiences and access to the countryside and coast.²

In 2020, East Lothian Council commissioned STR to undertake a survey among visitors to East Lothian in 2021.

This document presents the main findings from the East Lothian Visitor Survey 2021 and outlines the key conclusions, including visitor profiles, visit patterns, perceptions about the area, and expenditure habits.

This document is a brief summary of the East Lothian Visitor Survey that was conducted between May and October 2021.

Copywritten, designed and produced by STR, a CoStar Group Company, in 2022.
www.str.com

Sources:

¹ East Lothian Community Planning Economic Development Strategy 2012-22, STEAM 2020

² STR Traveller Panel COVID-19 Research (2020,2021)

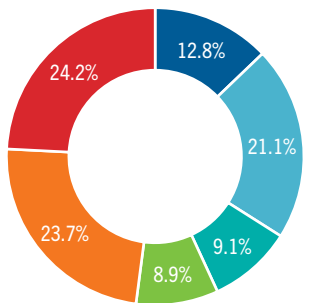
Market Overview

Prior to COVID-19, East Lothian's tourism economy fared comparatively well while many other U.K. coastal destinations experienced challenges as changing consumer behaviour, influenced by the growth of low-cost international travel, and other factors led to difficult trading conditions.

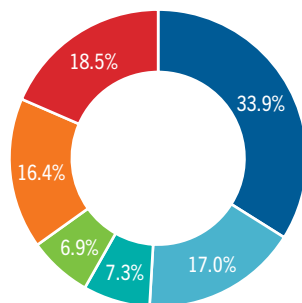
In recent years, the pandemic has caused a severe downturn in tourism in East Lothian and elsewhere in the UK as travel restrictions and other COVID-19 barriers have hampered the mobility of consumers, especially those from overseas.

According to the latest STEAM figures, visitors to East Lothian contributed circa £111m to the local community in 2020 which supported over 2,100 tourism-related jobs. Compared with 2019, this equated to a -60% decline in economic impact and -51% reduction in employment.

Sectoral Distribution of Economic Impact

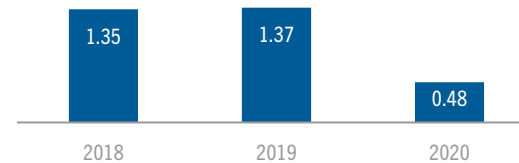


Sectoral Distribution of Employment

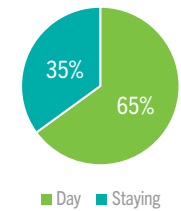


■ Accommodation ■ Food & Drink ■ Recreation ■ Shopping ■ Transport ■ Indirect

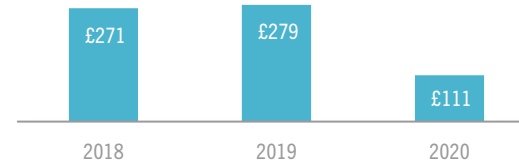
Visitor Numbers (Millions)



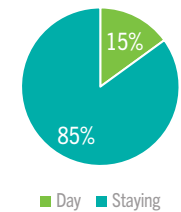
2020 Visitor Numbers



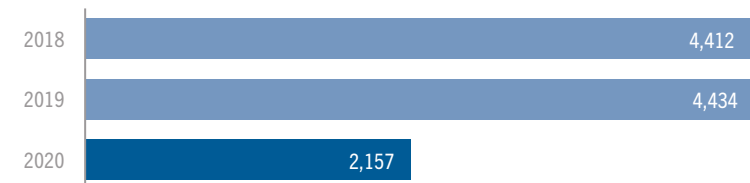
Economic Impact (Millions)



2020 Economic Impact



Full Time Employment Jobs (Thousands)



Who are East Lothian Visitors?

The survey recorded a broad mix of visitors to East Lothian.

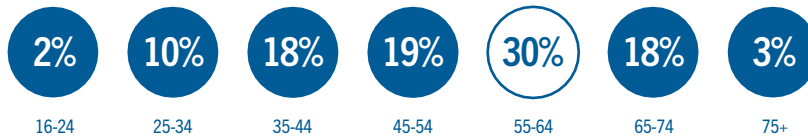
Visitors aged 55-64 were most common accounting for 30% of the overall sample. Meanwhile, those aged 35-44, 45-54 and 65-74 each accounted for nearly 20%.

The most common visitor group was two adults (45%) followed by family visitors who made up 32% of the overall sample.

The majority of visitors (65%) were working either full or part-time or were self-employed. Whereas nearly 3 in 10 were retired.

Scottish visitors made up the lion's share of visitors (64%). Those from England accounted for around a third and the remainder (2%) were from overseas. Highlighting the importance of local visitors to the area, Edinburgh residents accounted for around a quarter of all visitors.

Age Group



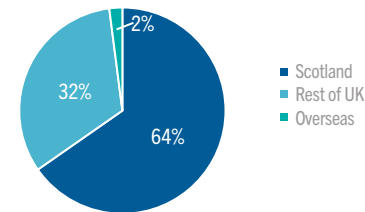
Party Size



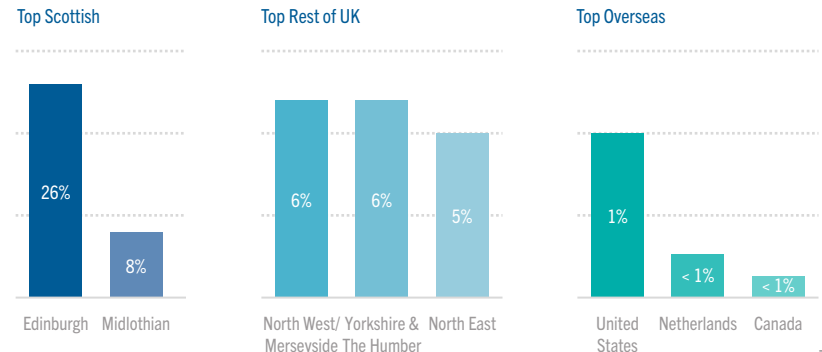
Working Status



Origin

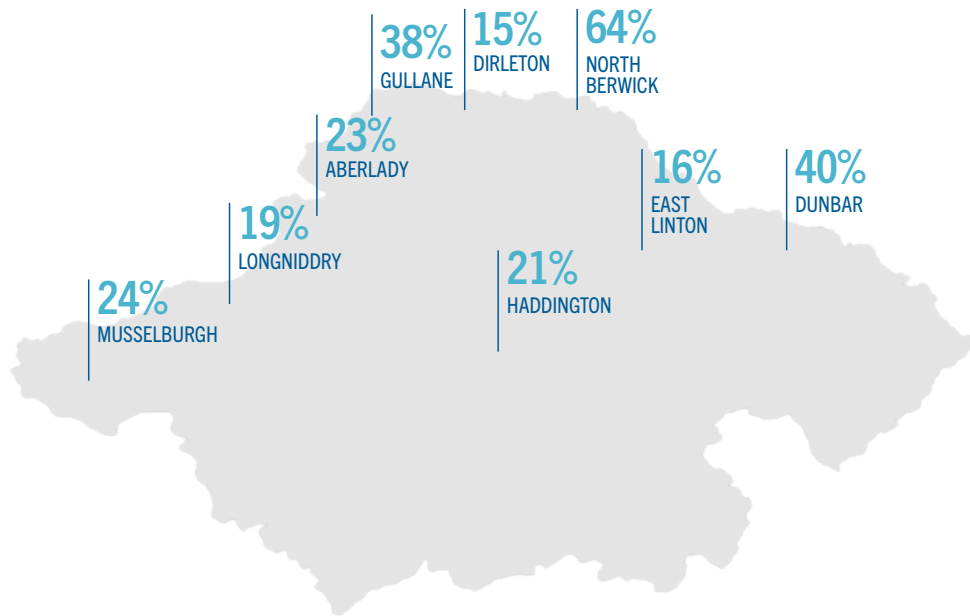


Top Markets



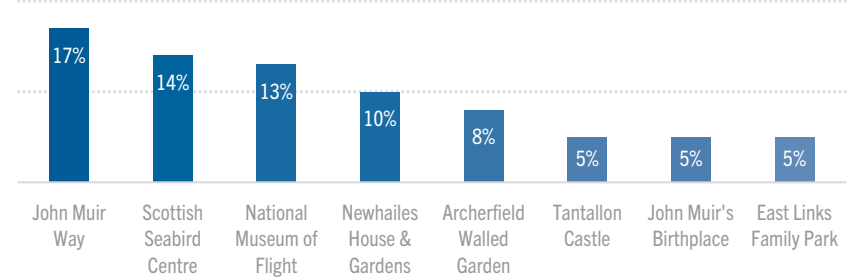
What Do East Lothian Visitors Do?

North Berwick was the destination's most visited town, with 64% of all East Lothian visitors spending time there, followed by Dunbar (40%) and Gullane (38%). Overall, 93% of visitors went to coastal towns and villages in East Lothian while 40% went to inland locations.

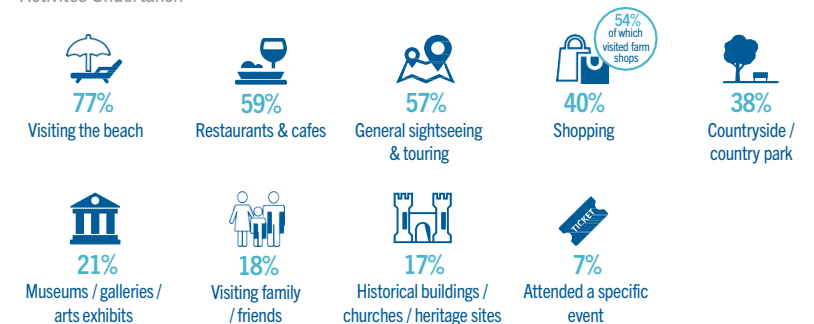


The John Muir Way, Scottish Seabird Centre and National Museum of Flight were the three most visited attractions during the trip. Visiting the beach was by far the most common activity followed by going to restaurants & cafes, and general sightseeing & touring. There was a much higher incidence of visits to East Lothian's beaches in 2021 (77% versus 62% in 2018).

Attractions Visited (Top 8)



Activities Undertaken

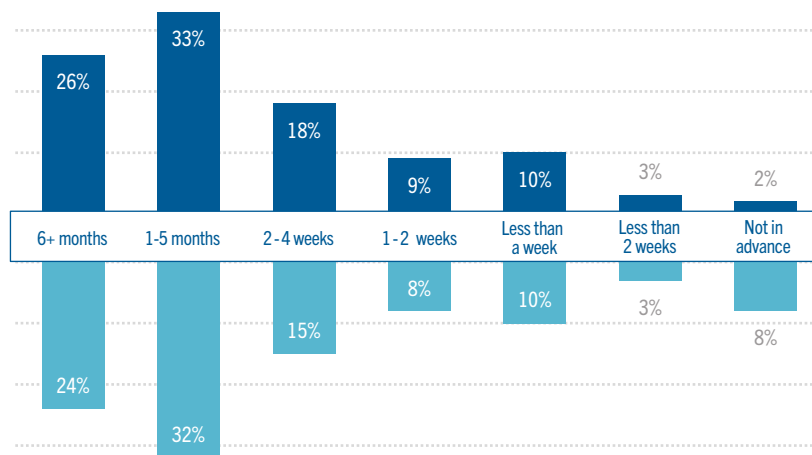


Planning and Booking Timescales

Most staying visitors (around 60%) planned and booked their trip at least one month before visiting. The most common planning and booking window was between 1 to 5 months before the visit. These findings highlight the need to provide information throughout the year to encourage and influence visits.

Less than 10% of staying visitors did not book an aspect of their trip in advance. The need to pre-book has become more important due to COVID-19. This shift in behaviour provides opportunities for more businesses to offer online booking which can also lead to improved visitor management.

Planning the Trip



Booking the Trip

Visitors were asked about how they used social media during and after their trip. 23% of visitors posted photos of their trip during their visit, while a smaller percentage used social media to post comments (15%), post videos (10%), like pages (7%) and post reviews (6%).



23%

Post photos



15%

Post comments



10%

Post videos



7%

Like social media pages



6%

Post reviews

For those who accessed information before or during their trip, search engines, personal recommendations, websites (including social media) and apps were important sources.

Leaflets & flyers and tourism information points tended to be used more by visitors while in the destination.

Info used before (Top 7)

61% used information sources before trip	
Online search engine e.g. Google, Bing	35%
Personal recommendation	26%
Other website <i>VisitScotland.com 7%, VisitEastLothian.org 5%</i>	18%
Tripadvisor	15%
Social media (e.g. Facebook / Twitter) <i>Facebook 12%, Instagram 4%, YouTube 2%</i>	14%
Smart phone / tablet app	13%
Leaflets (combined)	5%
I didn't use any information sources before visiting	39%

Info used during (Top 5)

52% used information sources during trip	
Online search engine e.g. Google, Bing	25%
Personal recommendation	17%
Smart phone or tablet computer app	13%
Leaflets (combined)	13%
Info points in museums / public libraries	10%
I didn't use any information sources during visit	48%

What East Lothian's Visitors Enjoy

Visitors were asked to rate various facilities and services in East Lothian. There were especially positive scores for the variety of attractions and welcome provided by locals as both were rated at over 4 out of 5. Transport services to and in the area were rated moderately well at around 3.5 out of 5 as too was the availability of toilets.

Visitors to East Lothian demonstrated very high levels of overall satisfaction as 38% stated their visit was better than expected while only 1% said the opposite. These results were comparable with 2018 and 2015 and were more positive compared with 2011 and 2003 visitor research.

Again suggesting high satisfaction and strong engagement with the destination, 72% of visitors said that they were very likely to recommend East Lothian as a place to visit (rating their likelihood to do so at 9 or 10 out of 10).

The overall visit to East Lothian was rated highly at 4.65 out of 5. This was slightly above 2018 (4.55) and 2015 (4.56).



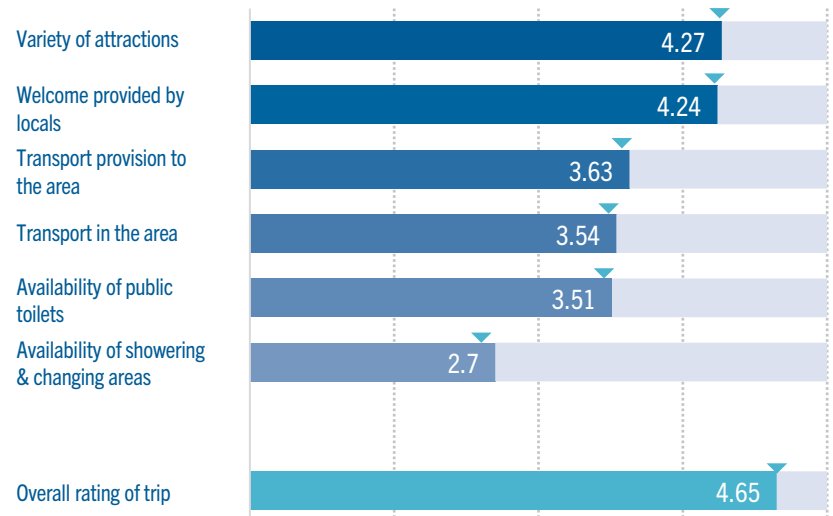
said their visit was "better than expected"



said they were very likely to recommend a visit to East Lothian

Visitor Ratings

1. Very poor ← → Very good 5.



Where East Lothian Visitors Stay

The average length of stay in East Lothian was 4.5 nights, which was a significant increase compared with 2018 (3.9 nights).

The most common form of accommodation was caravan parks / camping followed by rented flat / house and hotel.

Location (in terms of both access to places to visit and for peace and quiet) was a key driver in the decision to choose accommodation. The self-contained nature of the accommodation was also an important consideration, in light of COVID-19, as too was the quality of the accommodation and perception of value for money.

Visitors who stayed in paid accommodation were asked how difficult or easy it was to find accommodation of their preference in East Lothian. Overall, finding accommodation was perceived to be relatively easy as 71% stated so, although there were around 10% who found it difficult.

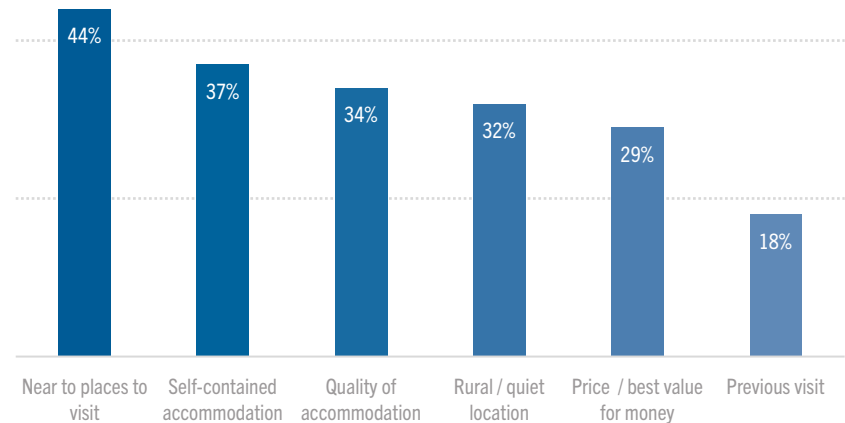
Average Length of Stay



Type of Accommodation



Reasons For Choosing Accommodation (Top 6)



East Lothian's Key Visitor Segments

Rural Relaxers 26%



Profile: Seeking relaxation whilst enjoying nature & wildlife

- More likely to be female
- Above average number of Scottish visitors
- More likely than average to be on a day trip
- Very likely to have visited before

Characteristics and importance:

- Main influences to visit were relaxation, to experience nature and wildlife and to enjoy peace and quiet
- Interested in beaches, the countryside, towns and villages
- Main reason to visit was for a leisure trip / holiday
- More likely to recommend than average

Sightseers 18%



Profile: Keen to explore & experience the area, often in family groups

- More likely to be female
- Highest percentage of groups with children
- Above average UK and overseas visitors
- More likely to stay overnight
- Above average first time visitors

Characteristics and importance:

- A broad range of aspects appeal including nature, towns, villages, museums and attractions
- Seek relaxation and want to enjoy nature while exploring the area
- Main reason to visit was for a leisure trip / holiday
- More likely to recommend than average

Active Explorers 16%



Profile: Keen to immerse themselves in all East Lothian has to offer

- Above average UK and overseas visitors
- More likely than average to stay overnight
- Longest average length of stay
- Above average first time visitors

Characteristics and importance:

- Drawn by wildlife, beaches, towns and villages to explore and to experience the unspoiled
- Interested in outdoor activities, sports and adventure
- High shopping expenditure and above average overall spend
- Demonstrated highest satisfaction and likelihood to recommend

Visiting Friends & Relatives 12%



Profile: Motivated to visit by friends & relatives

- More likely to be female and oldest average age
- Above average UK and Edinburgh visitors
- Above average repeat visitors
- More likely than average to stay overnight

Characteristics and importance:

- Main influence for visiting was to spend time catching up with friends & family
- Also interested in the beach, relaxing and experiencing nature
- Below average length of stay
- Likely to stay with friends & family but some stayed in paid accommodation
- Below average overall spend

Events Goers 8%



Profile: Motivated to visit by specific events, especially golf & horse racing related

- Highest proportion of Scotland visitors and above average Edinburgh visitors
- Above average repeat visitors
- Highest proportion of day visitors
- Younger than average audience

Characteristics and importance:

- Highly influenced by a specific event in the area, including horse racing and cultural events
- Relaxation plays a part in their decision to visit and some catch up with friends and family in the area
- Highest overall spend
- Below average likelihood to recommend the destination

How much East Lothian's Visitors Spend

These figures represent the average East Lothian visitor spend per day.

To gain a deeper understanding of expenditure between day visitors and overnights visitors, a total figure excluding accommodation spend is provided.

Please bear in mind that these figures do not necessarily state who the "most valuable" visitors are, as the length of stay differs between visitor segments. However, they do enable a good understanding of the economic impact of different types of visitors.

In particular, the findings below illustrate the significant benefits to the local economy of more visitors from outside of Scotland and especially those who choose to stay in East Lothian.



Average spend per person per day

	 Total	 Food & Drink	 Shopping	 Entertainment	 Travel & Transport	 Accommodation (overnight stays only)
Day Trip Scotland	£25.13	£12.02	£5.70	£3.62	£3.79	-
Day Trip Rest of UK ¹	£54.01	£21.67	£18.21	£7.50	£6.64	-
Staying Visitors Scotland	£56.64	£14.08	£11.95	£4.19	£3.76	£22.66
Staying Visitors Rest of UK	£71.96	£16.75	£9.33	£5.63	£4.42	£35.83
Rural Relaxers	£62.64	£11.07	£6.94	£2.38	£3.87	£38.38
Sightseers	£63.33	£15.35	£8.44	£4.24	£4.26	£31.04
Active Explorers	£77.31	£19.92	£14.59	£6.14	£5.82	£30.84
Visiting Friends & Family	£46.33	£13.19	£7.70	£2.81	£3.90	£18.73
Event Goers	£95.08	£19.81	£8.15	£9.77	£4.03	£53.31

¹ Caution small sample size (n<50)

East Lothian Tourism in Numbers

£111m

Visitor contribution to East Lothian economy in 2020

64%

Proportion of Scottish visitors

32%

Proportion of visitors with children

77%

Proportion visiting the beach

61%

Proportion of visitors obtaining information prior to trip

45%

Shared content or interacted with businesses on social media

38%

Proportion that said their visit was better than expected

97%

Proportion of visitors that rated their visit as good

4.5 days

Average length of stay in East Lothian

£14.57

Average expenditure per person per day on food and drink

£8.82

Average expenditure per person per day on shopping

£31.30

Average expenditure per staying visitor per day on accommodation