

Key findings from the 2024 East Lothian Visitor Survey

East Lothian Tourism Talks
27th March 2025



Background

Survey objectives

- To measure the profile of visitors to East Lothian
- Establish visitor perceptions and attitudes
- Provide comparisons with previous years
- Increase knowledge of day and overnight visitors
- Assess the levels of awareness of key attractions
- Identify the types of activities undertaken
- Establish how information is gathered pre and post arrival
- Understand spending behaviour during visits to the area
- Assess overall visitor satisfaction with the tourism product.

Approach

- Fieldwork from April to October 2024 with a total of 1,283 visitors surveyed over this period using a mix of methods.
- All respondents lived outside of East Lothian and included a mix of day and overnight visitors.
- Interviewing and promotion of the online survey took place in locations throughout East Lothian.
- Results compared with previous visitor surveys undertaken during 2018 and 2021.



Setting the scene

2024 was a mixed year for Scottish tourism

From staycations to stay cautious

Scottish market

- Visits and spend down on 2023
- Driven by reductions in families and young independents
- Recovery from older independents is an opportunity

English market

- Fewer visitors across all life stages
- However, an increase in spend per trip amongst those who do visit

Scotland is ahead of the curve for international arrivals

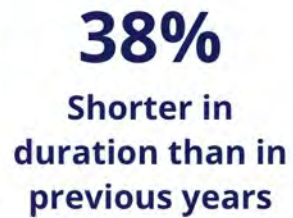
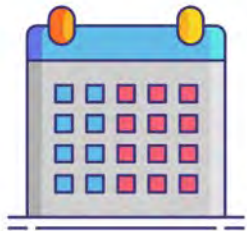
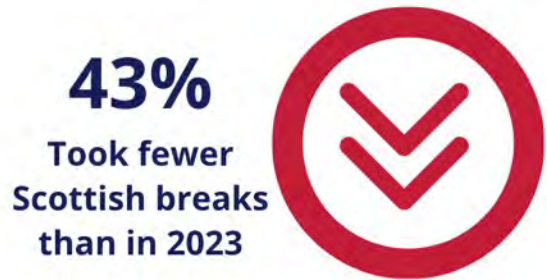
North American markets

- Continued growth – now exceeding pre pandemic levels
- Largely 45+ and travelling with friends or family

European markets

- Increased volumes of visits in 2024 but decreased per visit spend
- Largely younger age profile and families

The January Scottish Tourism Index showed that amongst Scots, cost of living pressures impacted on the number of Scottish breaks taken, their duration and levels of spend during visits



SPENDING ON SCOTTISH HOLIDAYS IN 2024 COMPARED TO PREVIOUS YEARS



WHY SPENT LESS?

"With Higher Income Tax, Higher Diesel costs, Accommodation and Food costs Higher, to name but a few, there is no spare money left over."

"Unable to afford anymore than what was spent."

"The general cost of items e.g. groceries, dining out, alcohol prices all increased."

"Rising cost of living means we have less disposable income"

"Less disposable income"

WHY SPENT MORE?

"We spent so much on purchasing items and eating variety of foods."

"The prices of things have gone up making me to spend more"

"Rising costs due to inflation."

"Longer holiday and everything got more expensive."

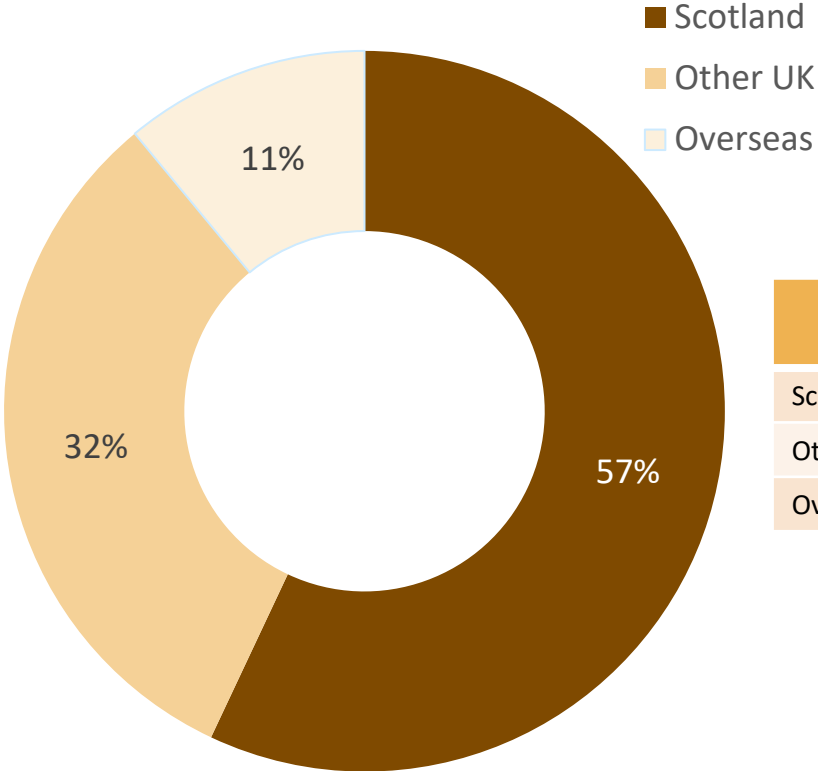
"Hotel and property rental more expensive. Price of food and eating out on Colonsay was expensive"

Who are East Lothian's visitors?



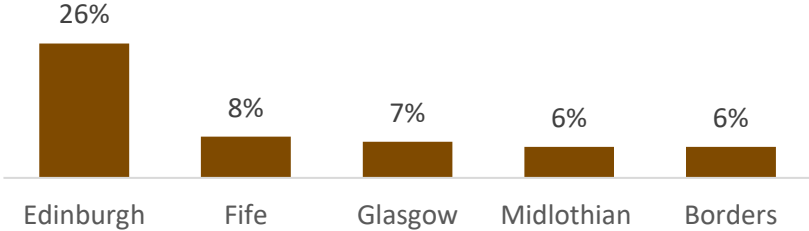
While the domestic market is largest, East Lothian also attracts visitors from much further afield. The profile of visitors largely reflects the national picture.

Visitor origin

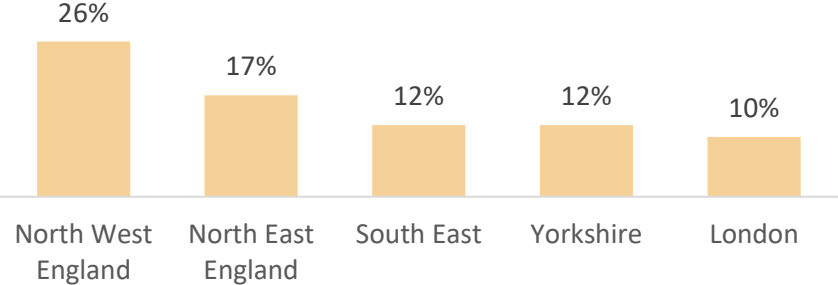


	Day visitors	Staying visitors
Scotland	75%	38%
Other UK	25%	40%
Overseas	-	22%

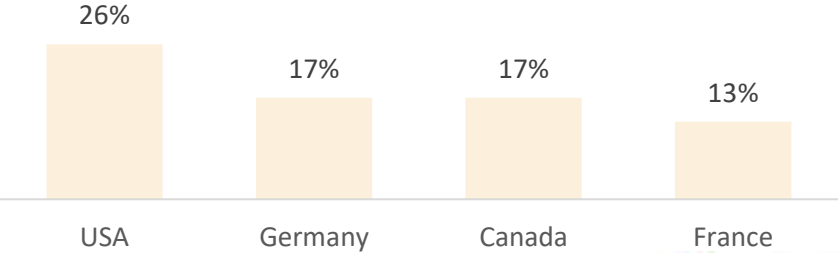
Top Scottish markets



Top Other UK markets

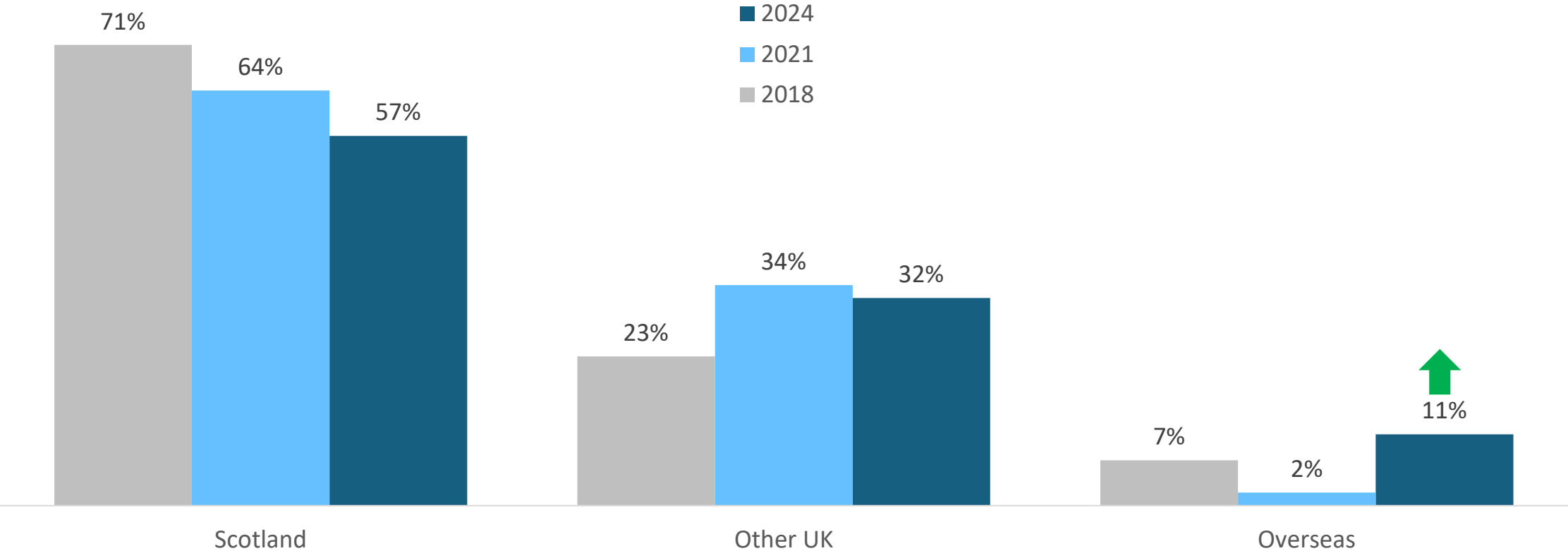


Top overseas markets



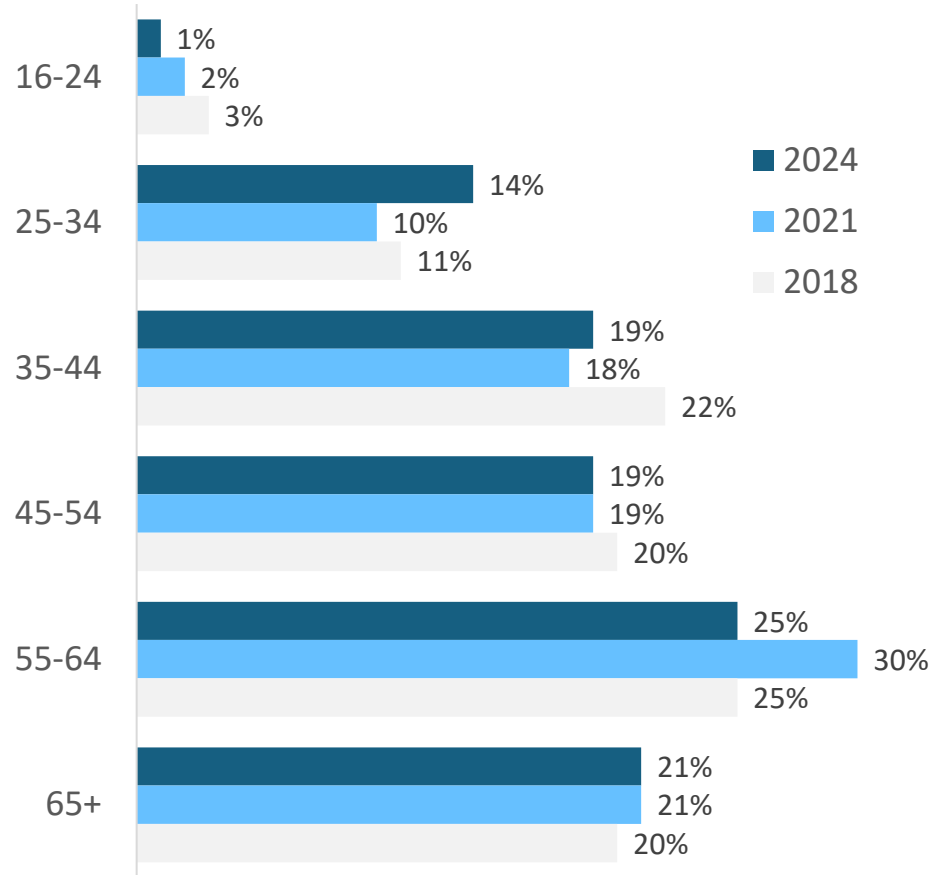
Also reflecting the national picture, the proportion of visitors from overseas has increased to a level higher than recorded pre-pandemic.

Visitor origin



In common with previous recent years, the area attracted an older visitor profile with almost half of visitors aged 55 or over. However, around a third of parties include children.

Age profile

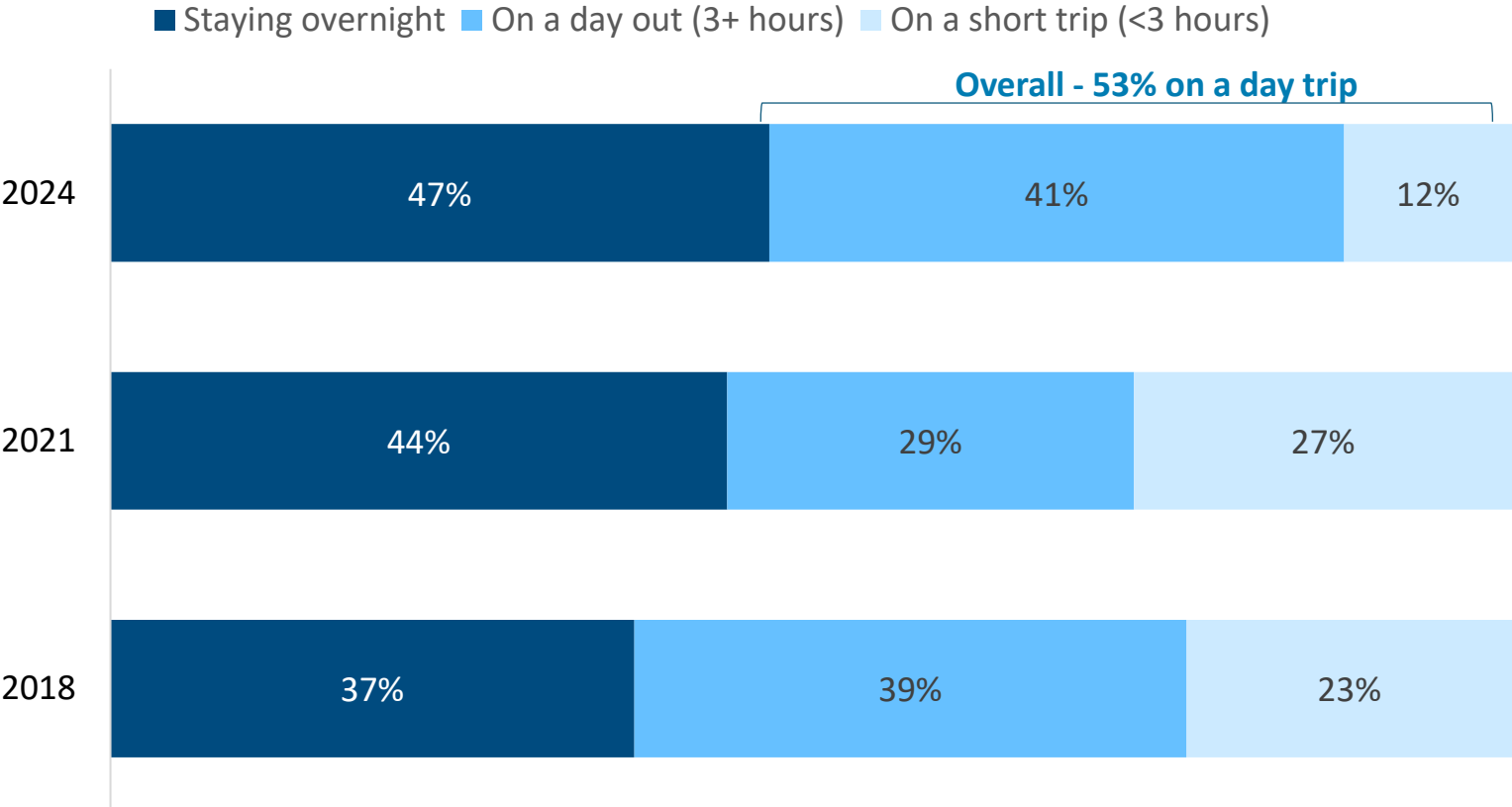


35%
Children
in party



Almost half of visitors (47%) stayed overnight in East Lothian, a higher percentage than in 2018 or 2021. Those resident outside of Scotland, first time visitors and older people were more likely to stay overnight.

Type of visit



Top 3 trip purposes:



71%
Leisure trip / holiday



17%
Visiting friends or relatives



6%
Attending a specific event

At £79 per per person per day average visitor spend was similar to that recorded in 2021 and 2018. The largest proportions of spend were on accommodation and eating and drinking.

Average spend per person per day – overall average 2018 – 2024

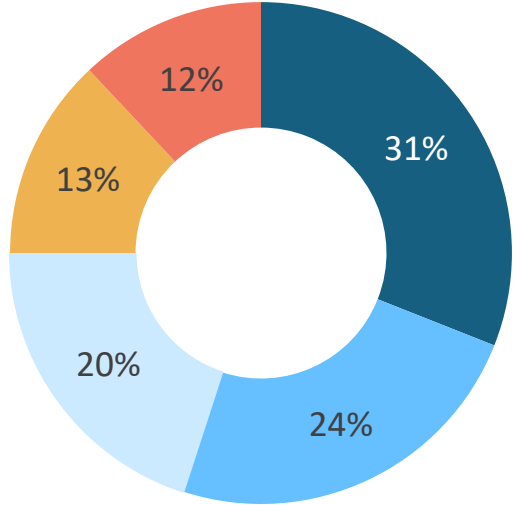


**Overnight
Visitors**
av.£114
per day



**Day
Visitors**
av.£41
per day

Share of total spend by category:



- Accommodation (all visitors)
- Eating and drinking
- Shopping
- Entertainment
- Travel and transport

Note 2018 and 2021 values are adjusted to reflect inflation, unadjusted historic values were £59 and £63 respectively.

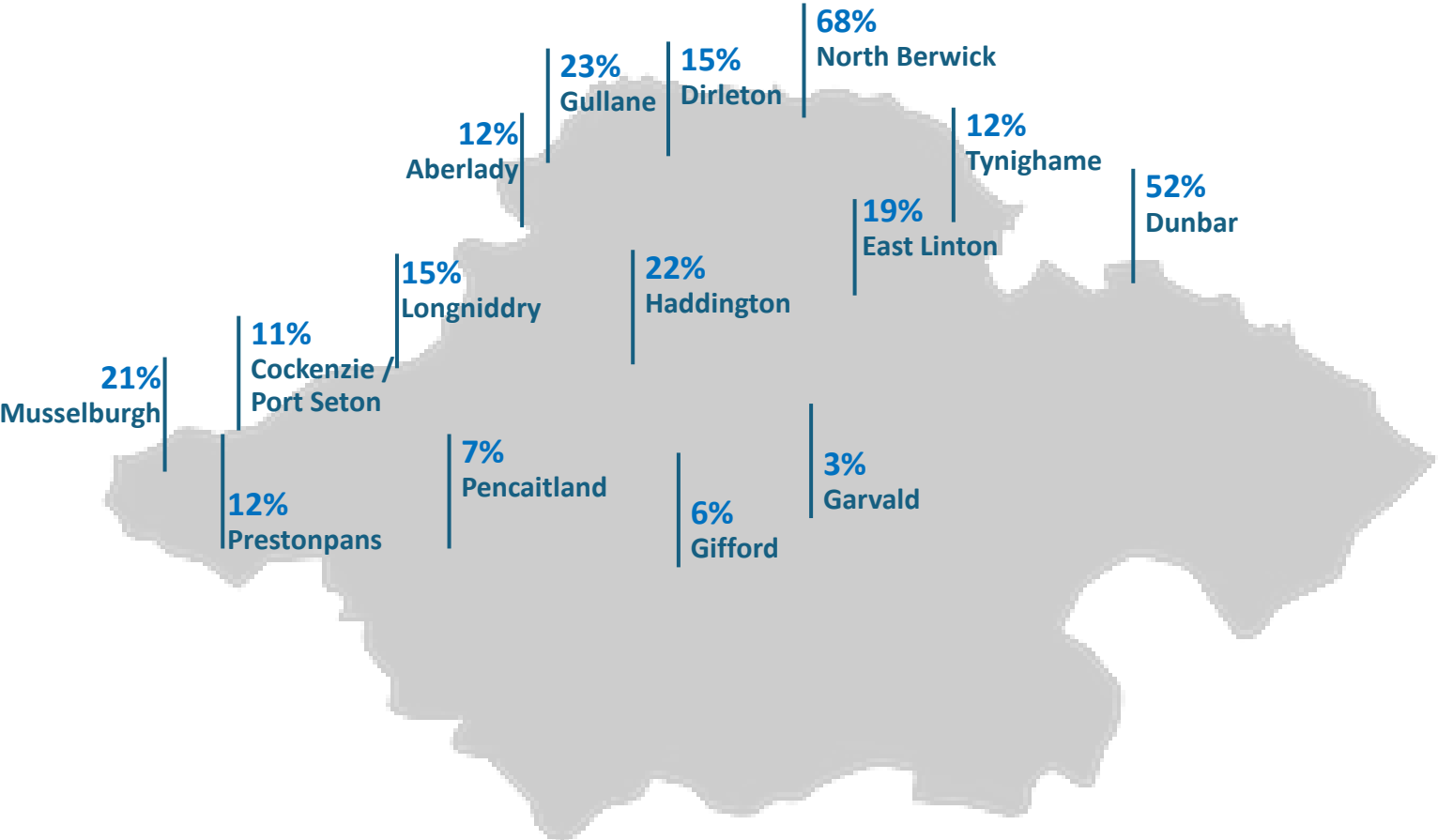
During your visit to East Lothian please could you tell us how much you spent on the following items IN TOTAL ON THIS TRIP. Please also include anything you spent on others (adults & children) on this trip. If you are still on your trip, please estimate the total amount you expect to spend by the time you leave East Lothian.



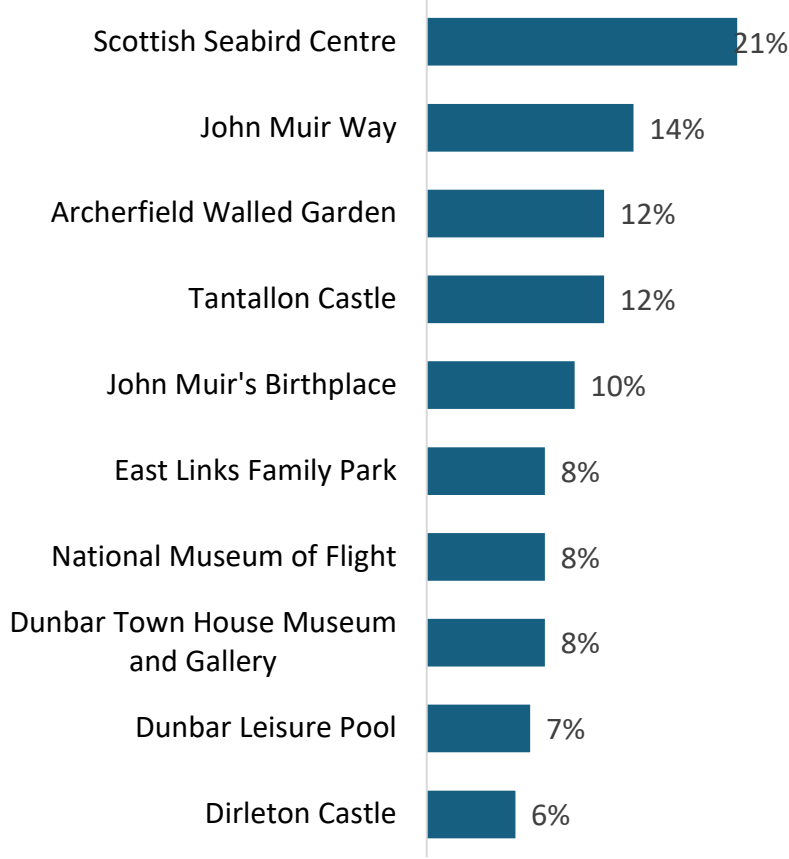
What do East Lothian's visitors do?

Consistent with 2018 and 2021, the most visited places were North Berwick (68%), Dunbar (52%) and Gullane (23%).

Places visited 2024

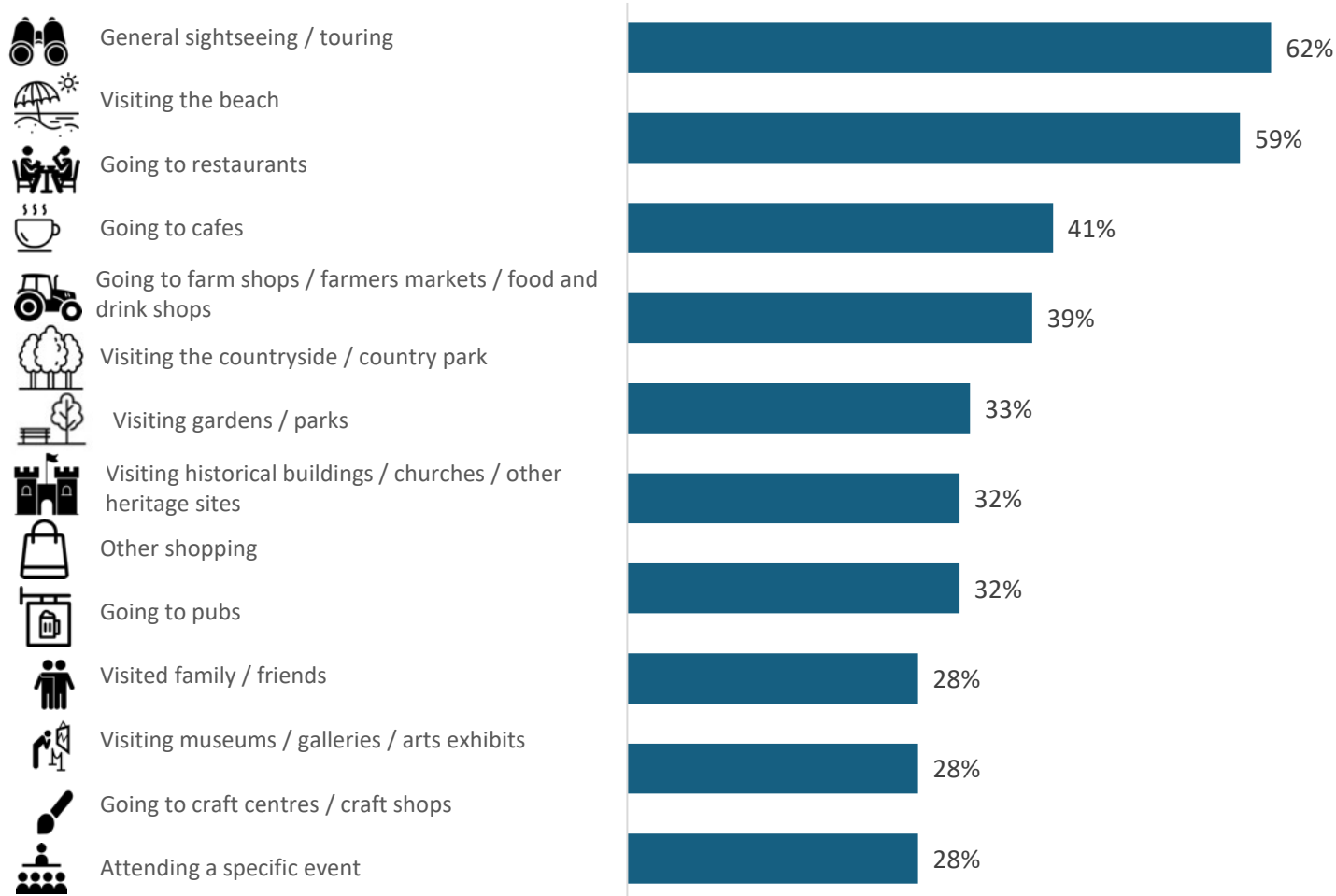


Top 10 attractions visited



The most frequently undertaken activities during visits were general sightseeing, visiting beaches and going to restaurants, cafes and farm shops. Changes in activities since 2021 may reflect some of the Covid-19 related restrictions and concerns during the previous survey period.

Activities undertaken



50% took part in outdoor pursuits...

	Top 5 outdoor pursuits
Walking/ hiking etc.	24%
Birdwatching	14%
Outdoor watersports/ swimming	14%
Golf	8%
Cycling	5%

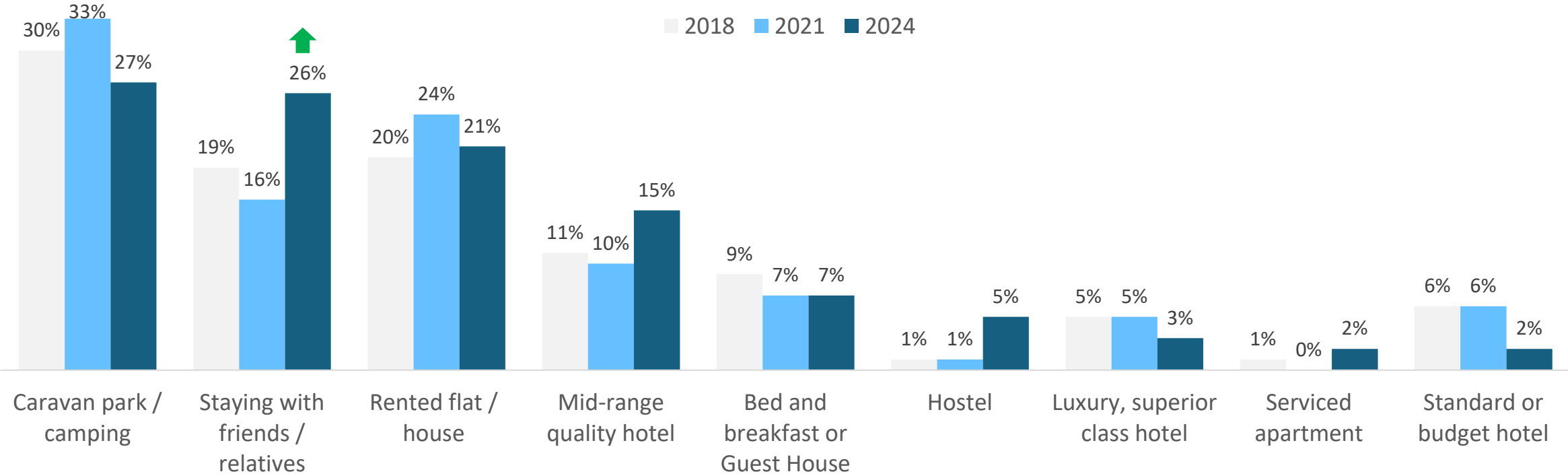
Trends since 2018:

- ↑ general sightseeing/ touring, eating out, visiting farm shops/markets, going to pubs.
- ↓ visiting the beach

Q30 Which of these activities, if any, did you do on your visit?

In common with 2018 and 2021 the most frequently used accommodation types were caravan and camping parks, the homes of friends and relatives and rented flats and houses.

Accommodation used

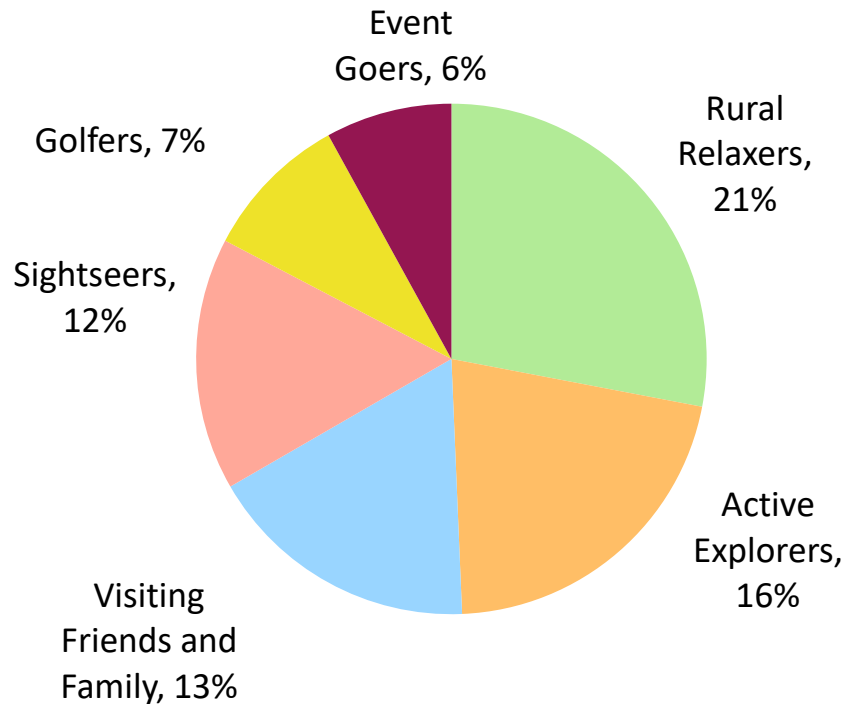


Higher amongst first time visitors (31%)


Higher amongst repeat visitors (32%)

Visitors to East Lothian can be defined into six distinct segments which overall represent around three quarters of the market.

Market segmentation




Rural Relaxers (21%):
seeking relaxation whilst enjoying nature and wildlife



More likely than the norm to:

- Be aged 45-64 and / or to have kids in their party
- Visit on a day trip lasting over 3 hours
- Visit the beach, gardens and/or countryside
- Use the Visit East Lothian website to plan visit


Active Explorers (16%):
keen to immerse themselves in everything the area has to offer



More likely than the norm to:

- Be a younger independent or in family lifestage
- Visit on a day trip lasting over 3 hours
- Live in the UK outside of Scotland and
- Stay overnight
- Take part in walking and watersports
- Provide high satisfaction ratings


Visiting Friends and Family (13%):
motivated to visit by the opportunity to visit friends or family in the area



More likely than the norm to:

- Be aged over 55
- Live in the UK outside of Scotland
- Be on a repeat visit to the area and stay overnight
- Use recommendations and social media
- Provide lower than average satisfaction ratings


Sightseers (12%):
keen to explore and experience the area



More likely than the norm to:

- Live outside of the UK
- Be on first visit to the area and stay overnight
- Take part in sightseeing, visiting beaches, attractions
- Use social media, TICs and guidebooks
- Provide high satisfaction ratings

Golfers (7%):
motivated by the chance to play golf in the area



More likely than the norm to:

- Not have children in party
- Live in Scotland
- Be on a repeat visit to the area
- Stay overnight
- Play golf and go to pubs
- Use social media, visiteastlothian.com, TripAdvisor and TV programmes

Event goers (6%):
motivated to visit by events in the area



More likely than the norm to:

- Be aged 55+ and Empty Nesters
- Be on their first visit to the area
- Stay overnight
- Visit historic buildings, gardens, countryside
- Use visiteastlothian.com, other websites and leaflets and brochures other than Visit East Lothian ones in trip planning



A young man and woman are sitting on a train, looking at a laptop and a card. The woman is holding a blue card and pointing at it. The man is typing on the laptop. They are both smiling and looking at the laptop screen. The background shows a window with a view of a city.

Planning and Information Sources






Visitors use a wide range of information sources for inspiration and information.

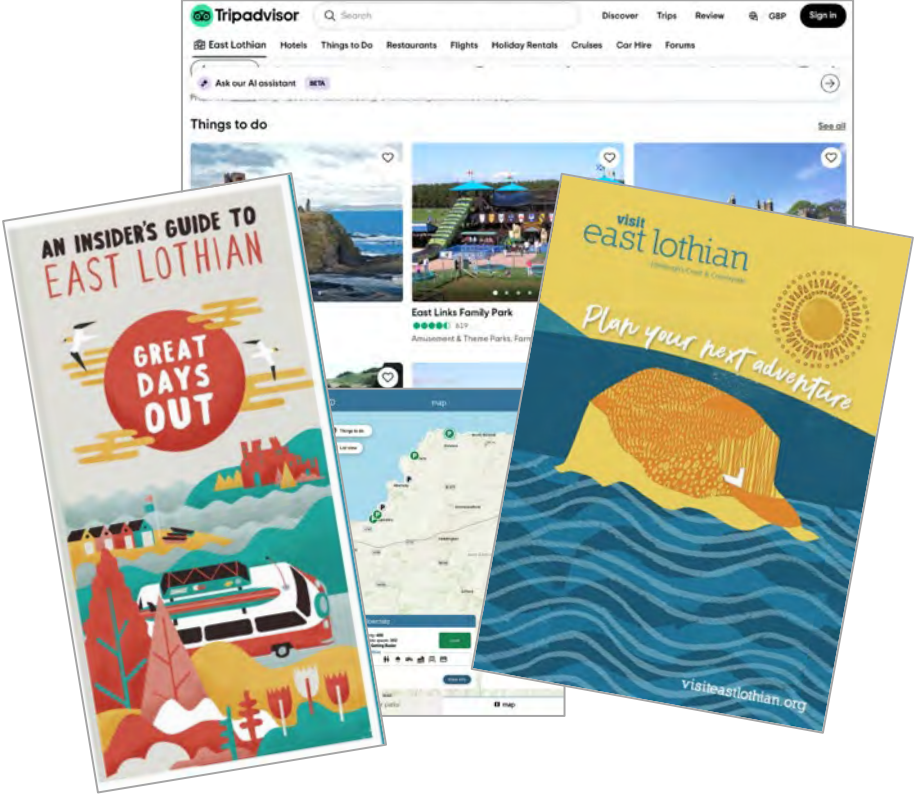
Most commonly used information sources:

When planning trip to East Lothian:

-  **32%** Personal recommendations
-  **24%** Social media
-  **17%** Online search engine
-  **17%** visiteastlothian.org
-  **16%** tripadvisor or other online review sites
-  **17%** other websites

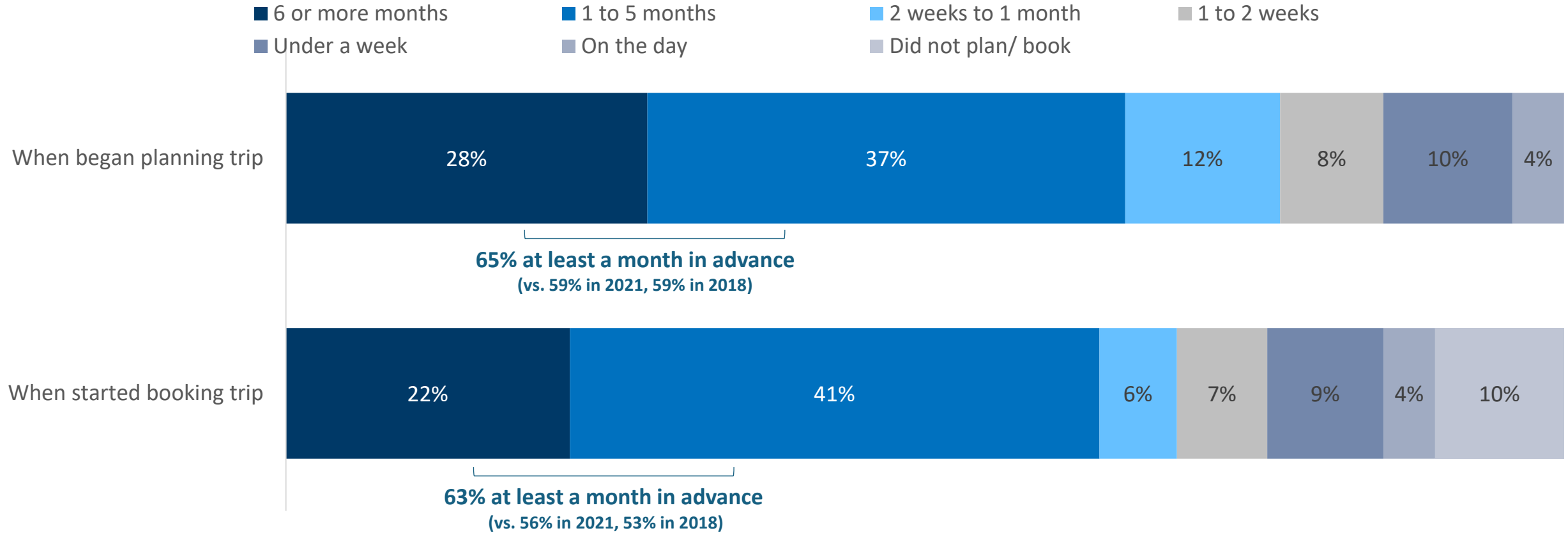
During trip to East Lothian:

-  **21%** Personal recommendations
-  **15%** Online search engine
-  **13%** Social media
-  **10%** leaflets/ flyers/ brochures
-  **10%** Visitor Information Centres
-  **10%** visiteastlothian.org



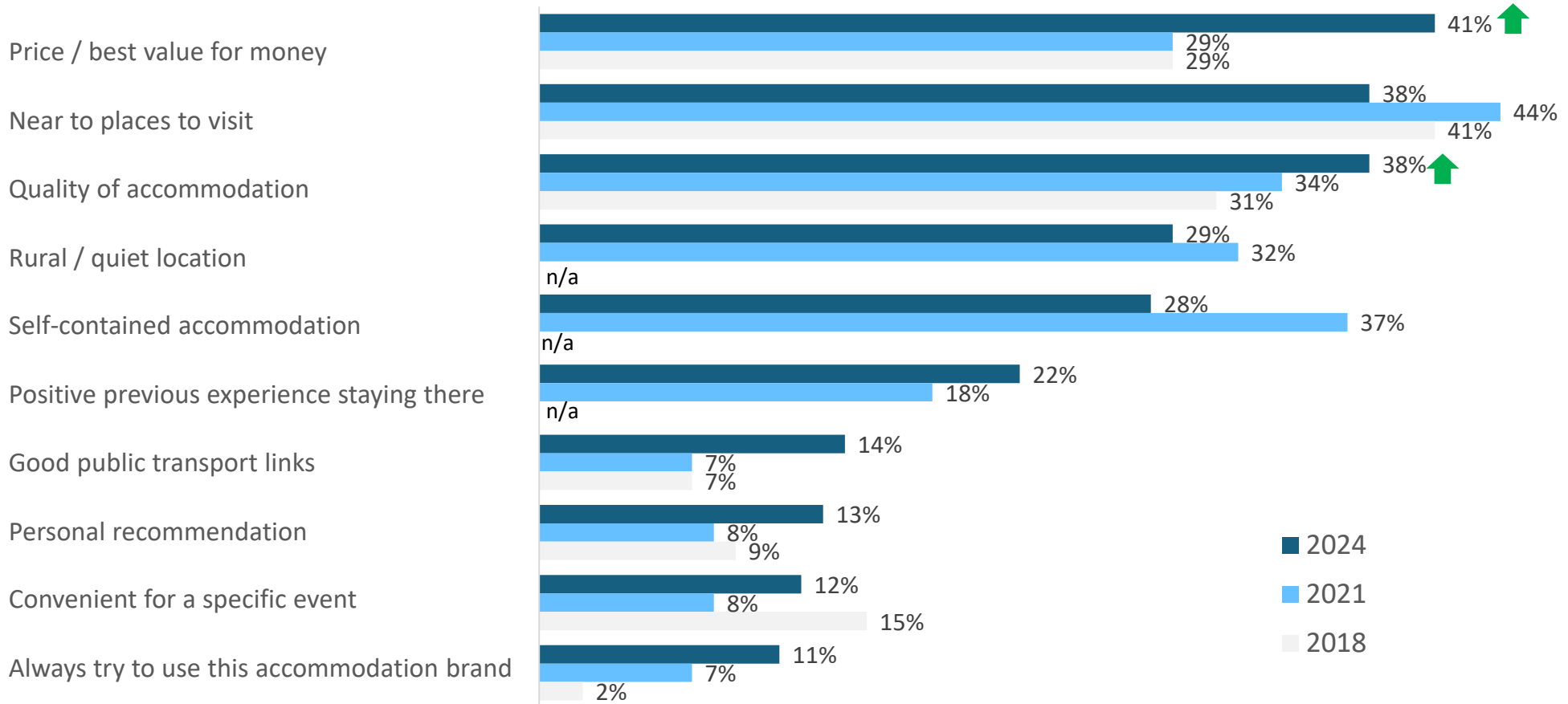
Possibly reflecting the larger share of international visitors, lead times for planning and booking overnight trips were on average longer than in 2018 or 2021.

Lead time for planning and booking overnight visits



In 2024 price was the factor most likely to influence accommodation choices followed by proximity to places to visit and quality of accommodation.

Reasons for choosing accommodation (Top 10)

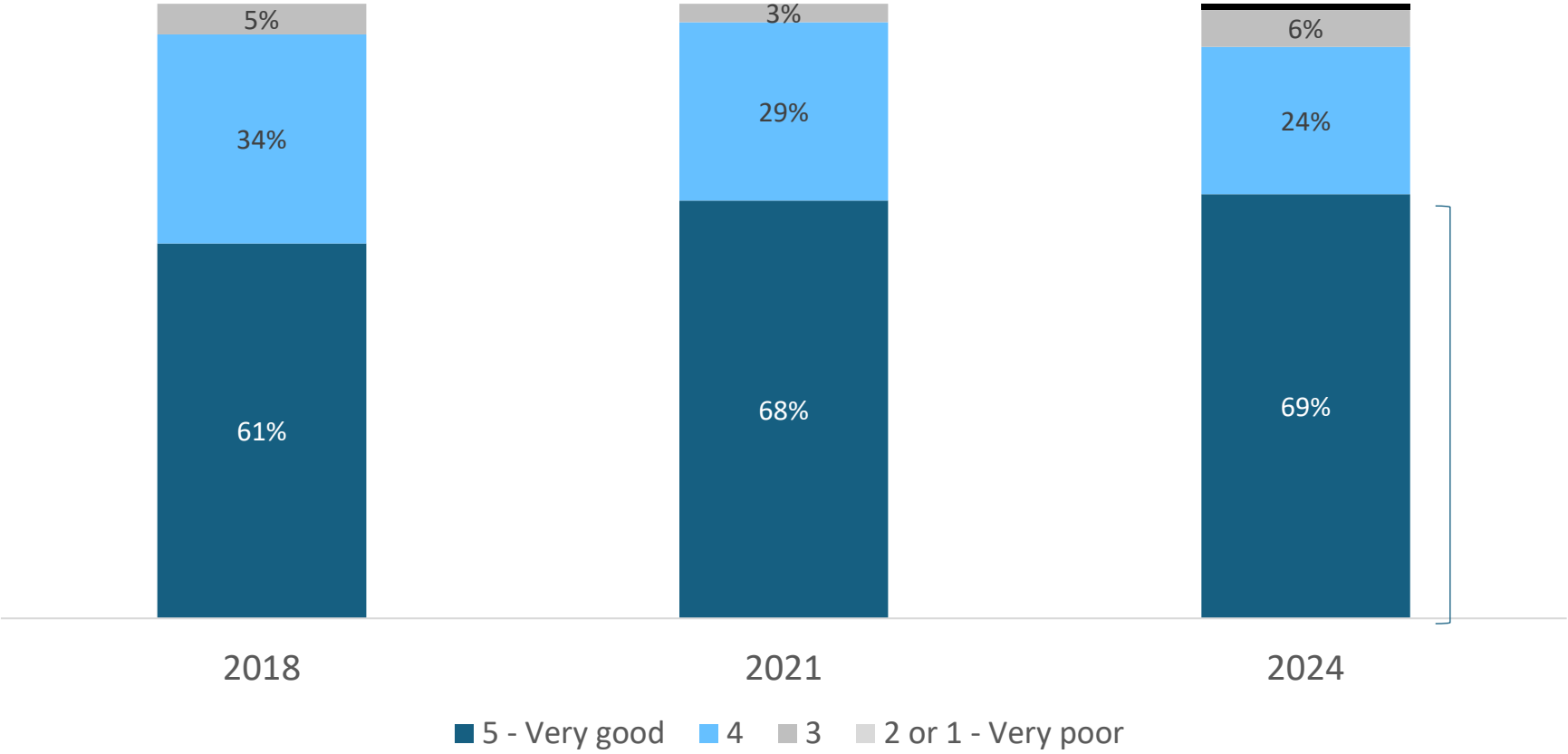




What do East Lothian's visitors enjoy?

The overall rating of visits to East Lothian were similar to 2021 and higher than in 2018. The highest rating was more likely to be provided by first time visitors and overnight visitors.

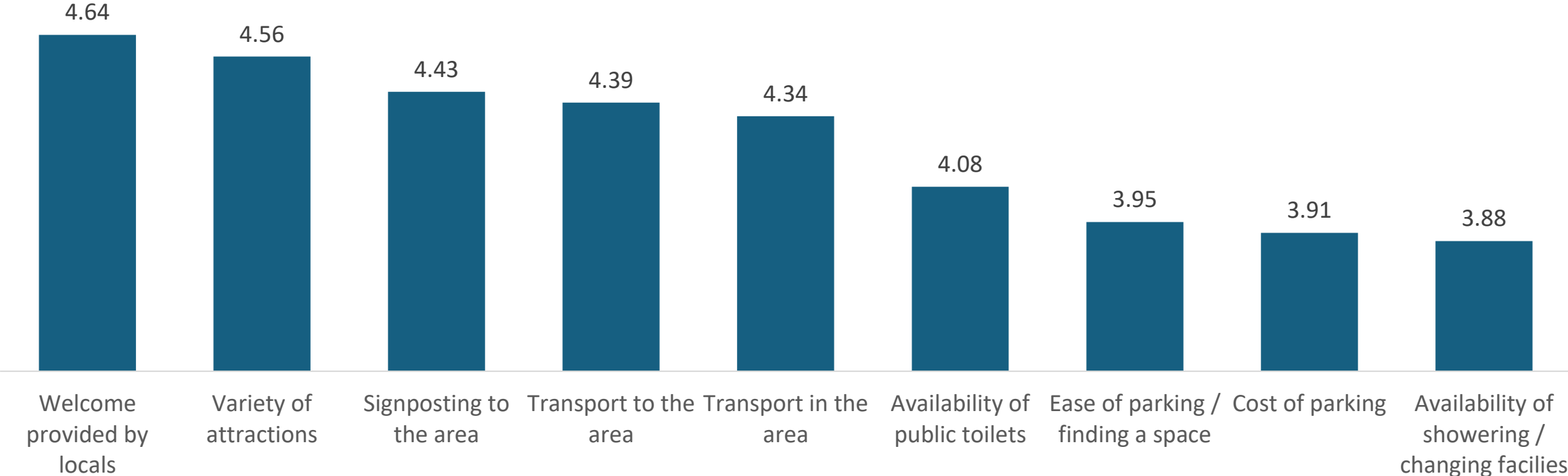
Overall rating of visits to East Lothian



- In 2024 highest amongst:**
- First time visitors (82%)
 - Overnight visitors (77%)
 - People aged 55+ (73%)

Aspects receiving highest ratings were the welcome from locals and variety of attractions while parking and availability of showing/ changing facilities received lower scores.

Average ratings for elements of visit experience (score out of 5)



An open question asked respondents what they liked most about the area. The most common strengths included the beaches, scenery, nature and opportunities for outdoor activities such as walks.

Key strengths – aspects most enjoyed about visits to East Lothian:

- ✓ **Beaches:**
- ✓ **Scenic Walks and Outdoor Activities**
- ✓ **Nature and Wildlife:**
- ✓ **Weather and Fresh Air**
- ✓ **Local Attractions and Family-Friendly Facilities**
- ✓ **Relaxation and Atmosphere**
- ✓ **Food, Drink, and Local Shops**

"We love everything about visiting this area but the most enjoyable aspect is always the beach. Specifically North Berwick, Gullane Bents, Seacliff and Tynninghame."

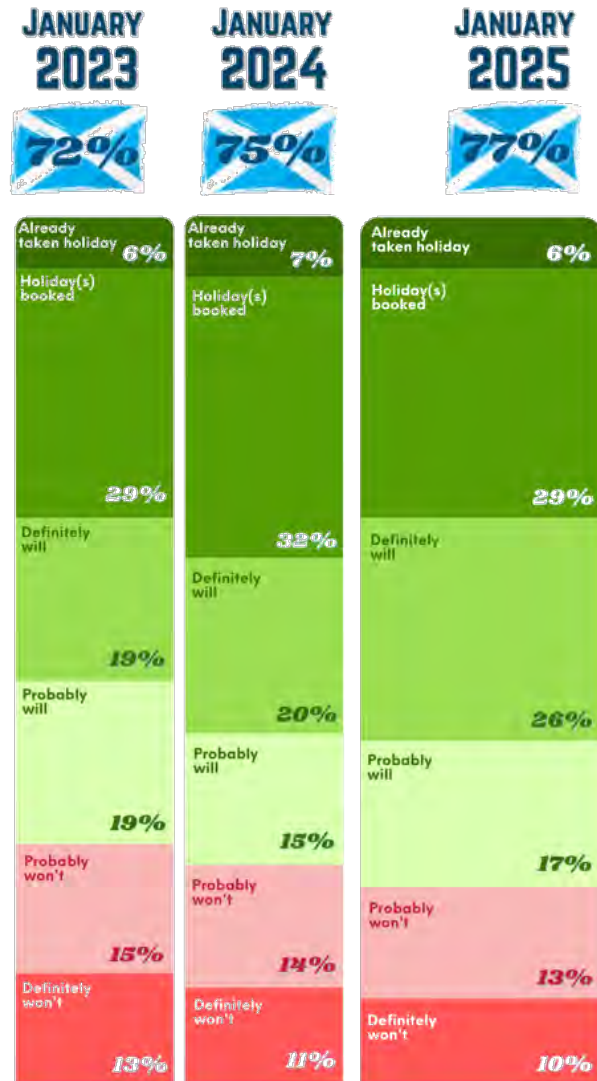
"We really like John Muir Country Park. It's a lovely walk, beautiful beach, and good play park."

"East Links Family Park was amazing as was the Museum of Flight. The beaches are just stunning."

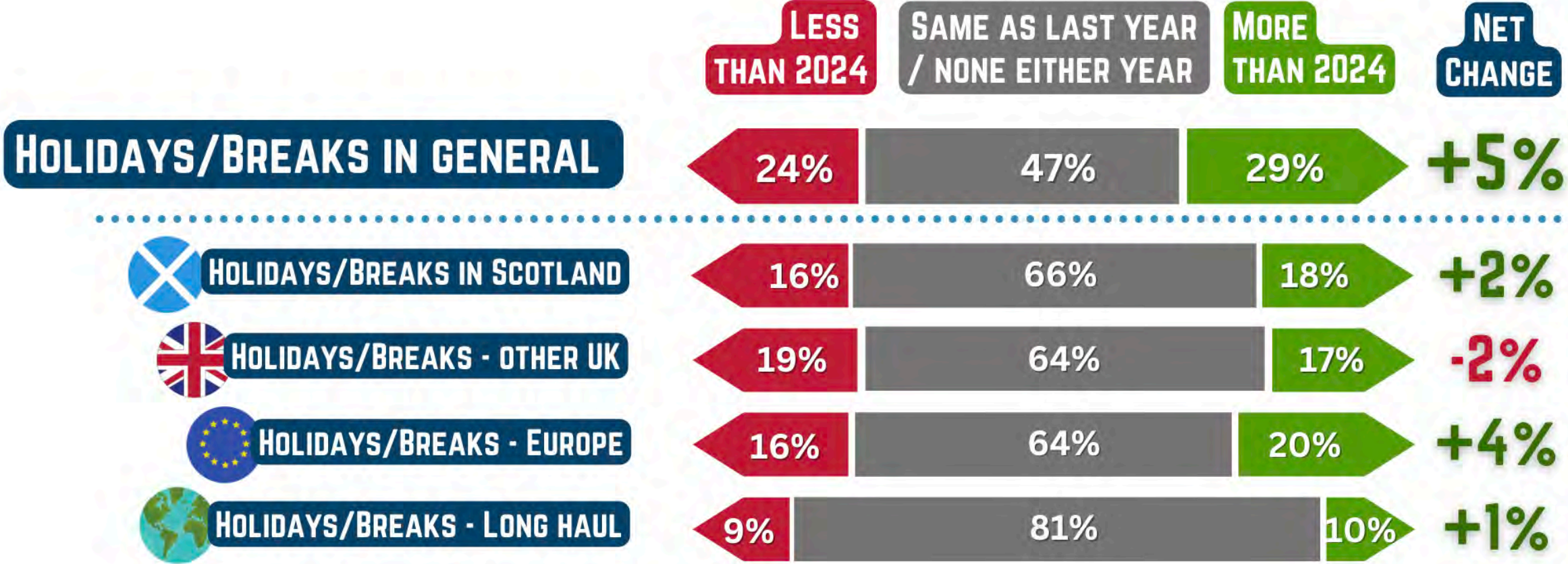


Looking to the future

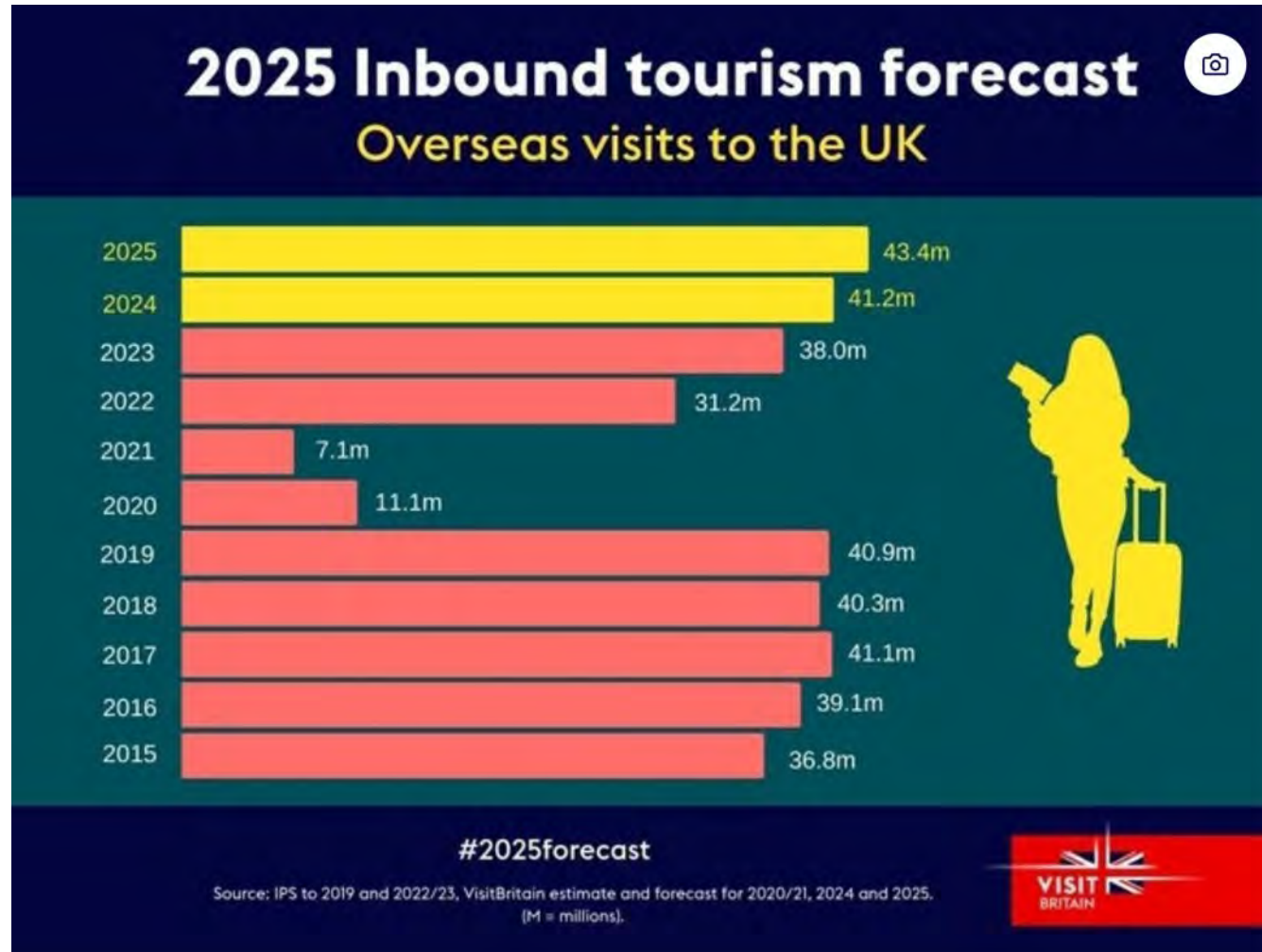
Our January Scottish Tourism Index provides an optimistic outlook for domestic tourism as slightly more of us anticipate taking a Scottish holiday this year.



And when asked directly about this year compared with 2024, there is further evidence that home holidays may increase in 2025 as part of an overall increase across the board.



VisitBritain also project record inbound tourism to the UK during 2025.



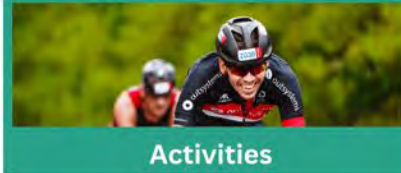
China and Canada both predicted to grow significantly during 2025.

Working with Yellow Railroad, we have identified 5 mega trends that have really come to the fore in the last 12 months and a larger number of longer term 'niche trends' which continue to evolve.

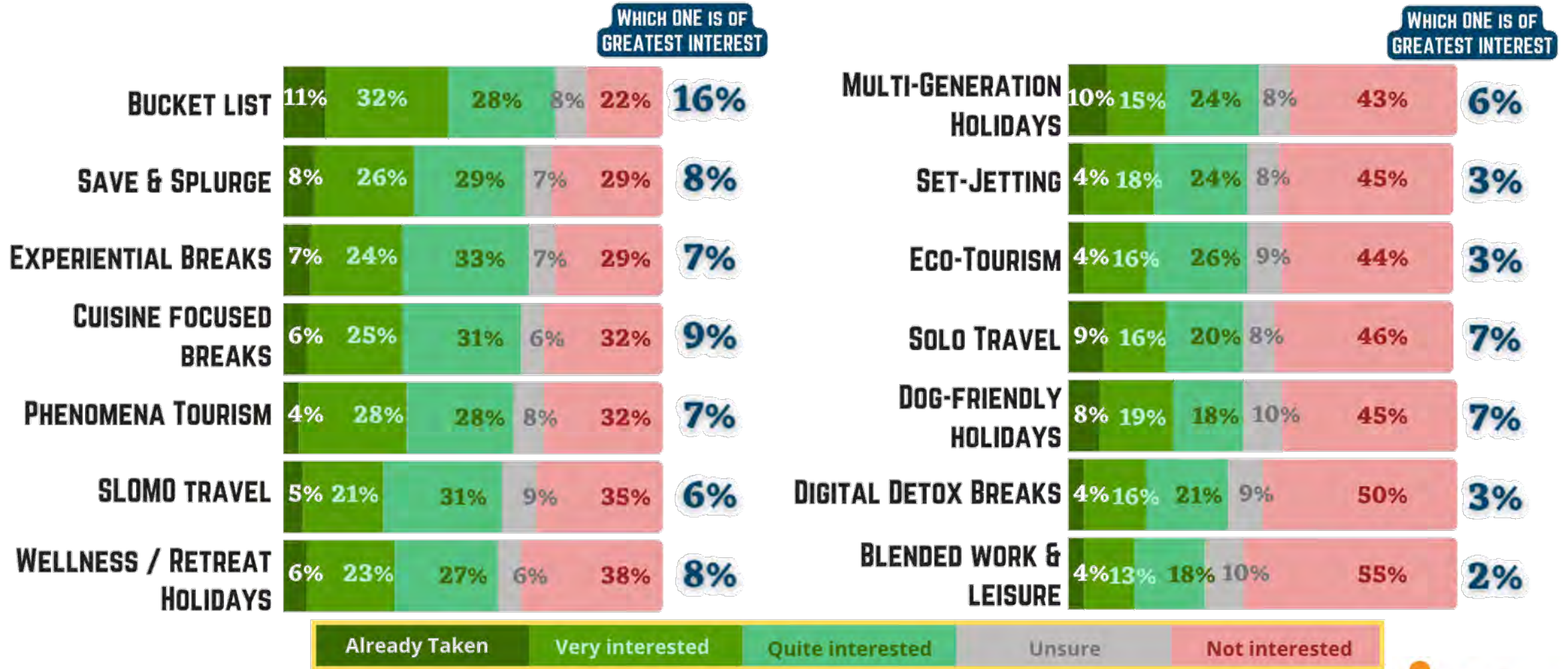
Mega trends



Niche trends



Amongst Scots, whilst Bucket List holidays are of greatest interest, emerging trip types are catering for an increasingly diverse range of niche interests as opposed to one or two major trends



In summary

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East Lothian is in a strong position..

- ✓ Increasingly diverse visitor market – a growing overnight and international element but also strong domestic and day visitor market.
- ✓ High levels of visitor satisfaction.
- ✓ Product strengths which fit well with growing tourism trends – nature, wellness, activities food and drink, family orientated.
- ✓ Predictions of growing visitor markets in 2025.

There are opportunities for tourism businesses to target product and marketing to these best prospect segments e.g.

- **Activity seekers** – watersports, cycling, walking, and nature experiences
- **Wellbeing seekers** – people looking for relaxation & escape
- **Luxury seekers** – resilient, high-spending market segment
- **Family market** – large existing audience with potential including multi-generation families
- **Events** – high first-time visitor rates, leading to repeat visits
- **Accessible tourism** – growing importance, including neurodiverse & mobility-impaired travellers



Thank You!

Prepared for East Lothian Council by 56 Degree Insight (part of the JRS Research Consortium)

www.56degreeinsight.com

