



East Lothian Tourism performance

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Global Tourism Solutions (UK) Ltd

East Lothian 2013-2024

STEAM REPORT FOR 2013-2024 - DRAFT

EAST LoTHIAN COUNCIL

All Financial Outputs in Historic Prices

REPORT NAVIGATION



CLICK THE SECTION HEADINGS OR EXAMPLE IMAGES TO NAVIGATE TO EACH REPORT SECTION

KEY ECONOMIC IMPACT MEASURES

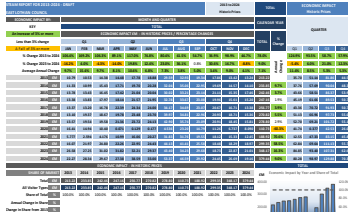
Comparative Headlines

Compares Performance between Two Years



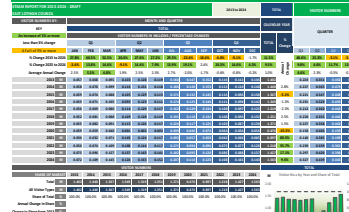
Economic Impact

Combined Direct and Indirect Expenditure



Visitor Numbers

The Number of Tourism Visits to the Area



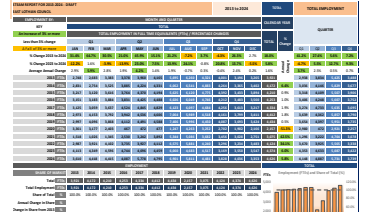
Visitor Days

The Number of Days / Nights Spent by Visitors to the Area



Employment Supported

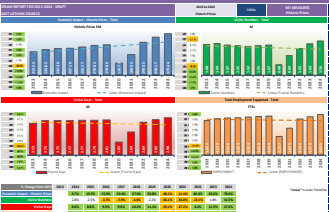
The Number of Employees (FTEs) Supported Directly and Indirectly by Tourism



FURTHER ANALYSES AND OUTPUTS

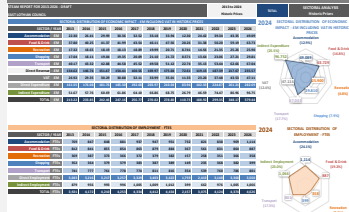
Key Measures

The Four Key STEAM Impact Measures for the Trend Period

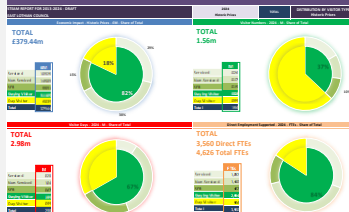


Sectoral Analysis

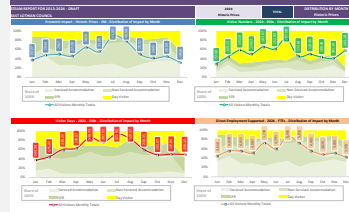
Sectoral Distribution of Visitor Expenditure and Employment



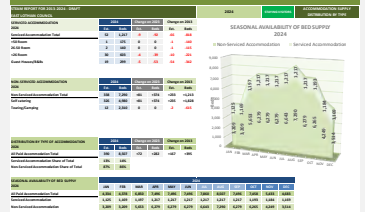
Annual Impact Distribution by Visitor Type



Monthly Impact Distribution by Visitor Type



Accommodation Supply by Type of Establishment



GUIDANCE

User Guide
Making the Most of your STEAM Report

GTS and STEAM
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SUPPLEMENTS

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DATA

Data Table
Monthly Data Supplied for all Measures and Years

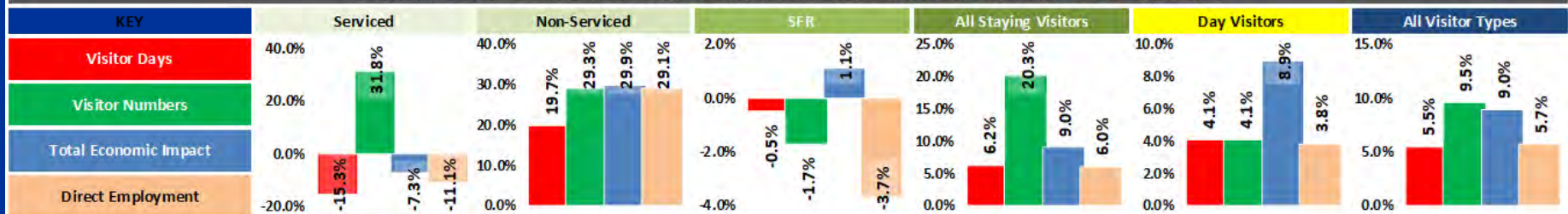
East Lothian 2013-2024

STEAM REPORT FOR 2013-2024 - DRAFT							Comparing 2024 and 2023			COMPARATIVE HEADLINES		
EAST LoTHIAN COUNCIL							All £'s Historic Prices					

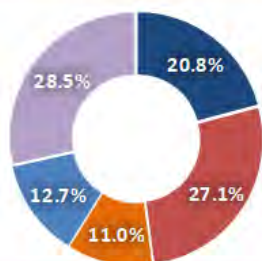
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2023 - IN HISTORIC PRICES

KEY	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types				
	Serviced			Non-Serviced			2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023
An increase of 3% or more																				
Less than 3% change																				
A Fall of 3% or more																				
Visitor Days	M	0,282	0,333	-15.3%	1,038	0,867	19.7%	0,670	0,673	-0.5%	1,990	1,873	6.2%	0,985	0,947	4.1%	2,976	2,820	5.5%	
Visitor Numbers	M	0,258	0,196	31.8%	0,166	0,129	29.3%	0,153	0,155	-1.7%	0,577	0,480	20.3%	0,985	0,947	4.1%	1,563	1,427	9.5%	
Direct Expenditure	£M																282.69	261.21	8.2%	
Economic Impact	£M	109.25	117.81	-7.3%	145.89	112.27	29.9%	55.91	55.30	1.1%	311.05	285.38	9.0%	68.39	62.78	8.9%	379.44	348.17	9.0%	
Direct Employment	FTEs	1,092	1,228	-11.1%	1,440	1,116	29.1%	462	479	-3.7%	2,994	2,823	6.0%	566	545	3.8%	3,560	3,368	5.7%	
Total Employment	FTEs																4,626	4,374	5.8%	

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES



Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport

Direct Expenditure Categories

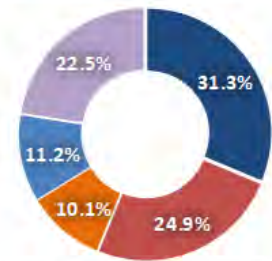
	2024	2023	+/- %
Accommodation	58.91	52.02	13.2%
Food & Drink	76.48	71.03	7.7%
Recreation	31.08	30.31	2.5%
Shopping	35.77	32.65	9.6%
Transport	80.45	75.20	7.0%
TOTAL DIRECT	282.69	261.21	8.2%
Indirect	96.75	86.96	11.3%
TOTAL	379.44	348.17	9.0%

Sectors

Sectors	2024	2023	+/- %
Accommodation	1,114	969	14.9%
Food & Drink	887	864	2.6%
Recreation	358	366	-2.3%
Shopping	399	382	4.4%
Transport	801	786	2.0%
TOTAL DIRECT	3,560	3,368	5.7%
Indirect	1,066	1,005	6.1%
TOTAL	4,626	4,374	5.8%

Sectoral Distribution of Employment - FTEs

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport



Direct Employment Categories

East Lothian 2013-2024

Scottish Tourism Economic Activity Model (STEAM) Draft Report

- 1.56m visitor numbers - up 9.5% on 2023
- 2.98m visitor days - up 5.5% on 2023
- £379m economic impact - up 9.0% on 2023
 - - up 3.9% when adjusted for inflation
- 4,626 FTE jobs supported by tourism - up 5.8%
 - Up 25% within accommodation-related employment since 2012

East Lothian 2013-2024

- **.985m visits made by Day Visitors to East Lothian in 2024- up 4.1% on 2023**
- **Day Visits generated £68 million for the economy of the area in 2024**
- **On average, visitors staying in East Lothian stay 3.9 nights and spend £59 million on local accommodation (1.7 nights SA, 6.7 nights NSA)**
- **Staying visitors generate a total economic impact of £311 million for businesses in East Lothian**

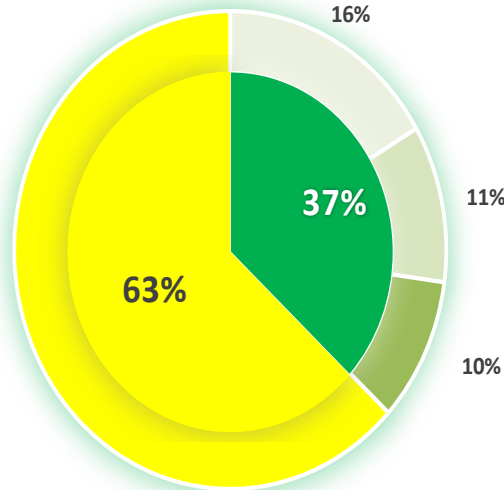
East Lothian Visitor Numbers

- 1.35m visitor numbers – relatively stable over past ten years
 - Non-serviced visitor numbers up 7.6% since 2009

Visitor Numbers - 2024 - M - Share of Total

TOTAL
1.56m

	M
Serviced	0.26
Non-Serviced	0.17
SFR	0.15
Staying Visitor	0.58
Day Visitor	0.99
Total	1.56

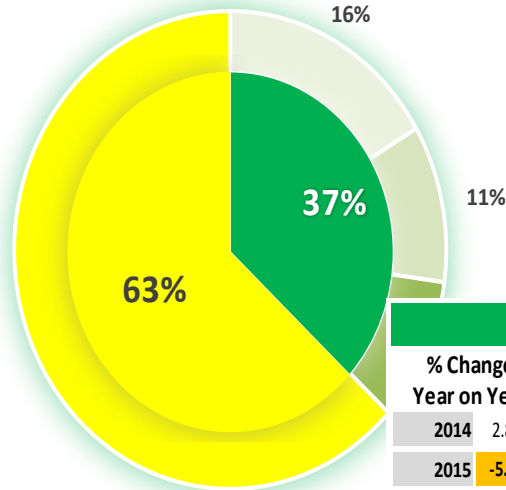


East Lothian Visitor Numbers

- 1.56m visitor numbers - *relatively stable over past 12 years*
- Serviced up 40%; Non-serviced up 53%; Day Visitors up 1% since 2013

Visitor Numbers - 2024 - M - Share of Total

TOTAL
1.56m



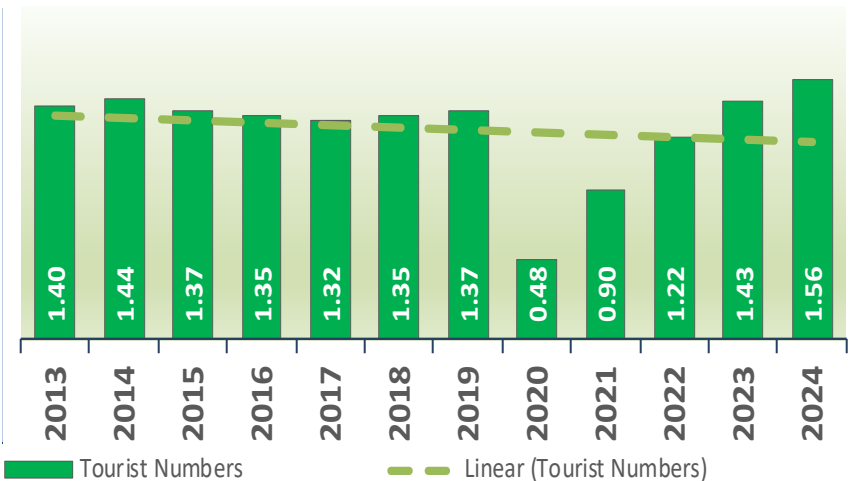
M

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Staying Visitor	0.58
Day Visitor	0.99
Total	1.56

Visitor Numbers - Total

% Change
Year on Year

2014	2.8%
2015	-5.1%
2016	-1.3%
2017	-2.3%
2018	2.5%
2019	1.5%
2020	-65.3%
2021	88.5%
2022	35.7%
2023	17.1%
2024	9.5%

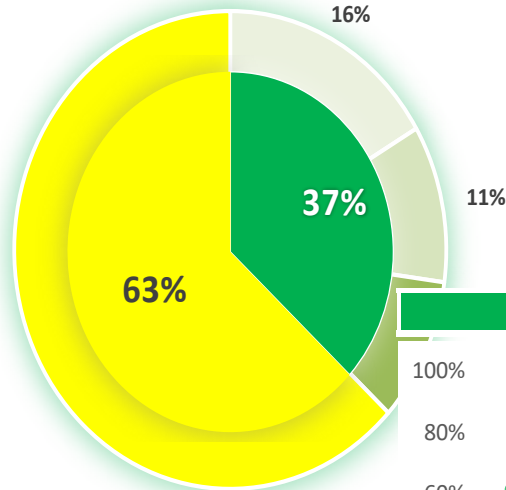


East Lothian Visitor Numbers

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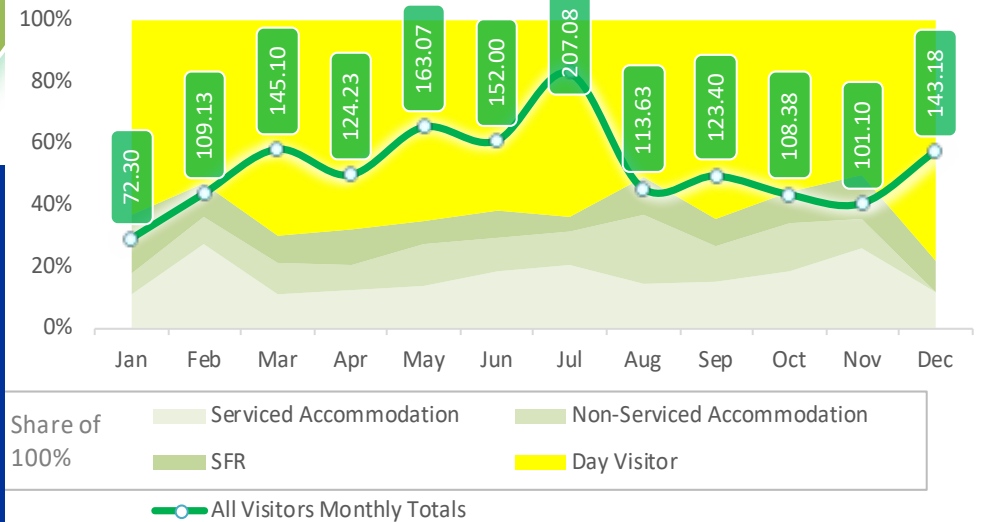
Visitor Numbers - 2024 - M - Share of Total

TOTAL
1.56m



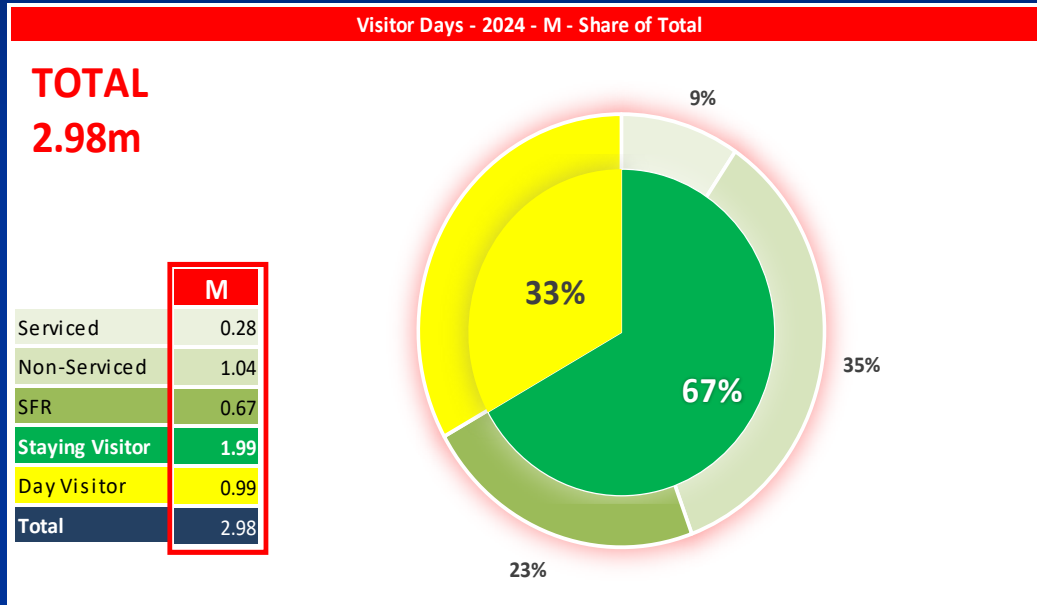
	M
Serviced	0.26
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Total	1.56

Visitor Numbers - 2024 - 000s - Distribution of Impact by Month



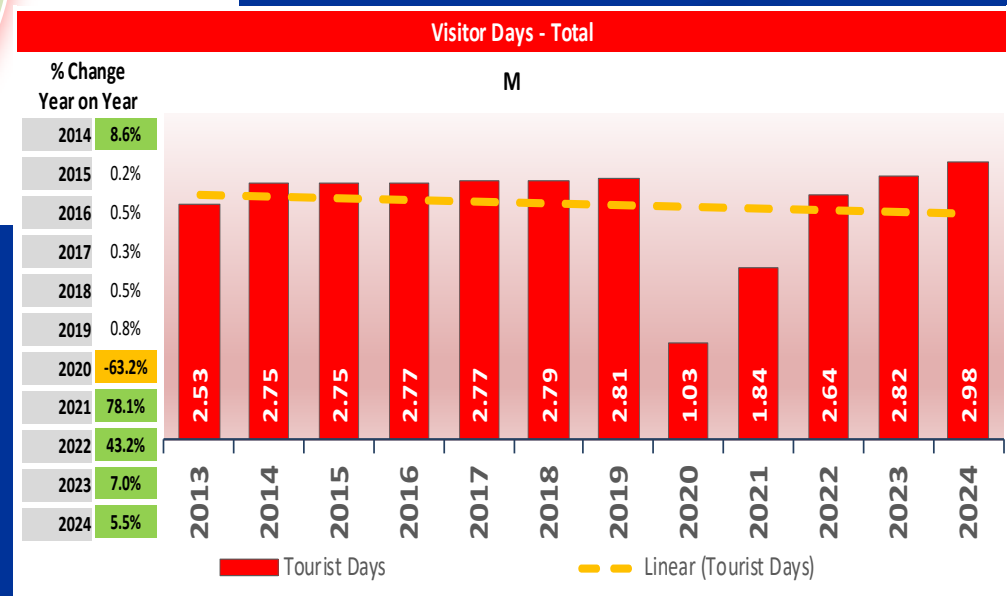
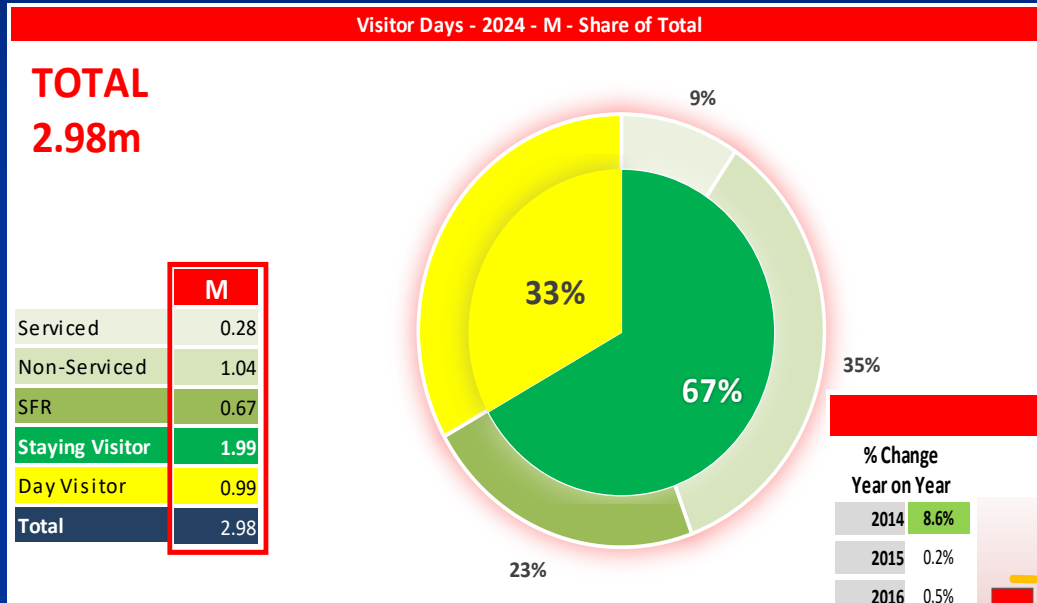
East Lothian Visitor Days

- 2.98m visitor days - up 18% since 2013
 - 28% increase within staying visitors over same period (but split)



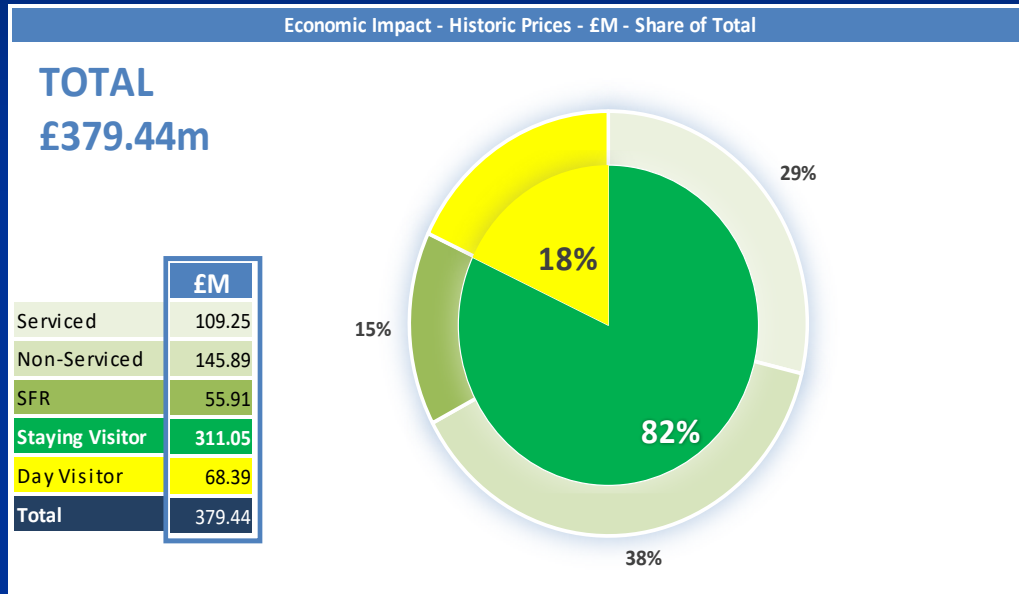
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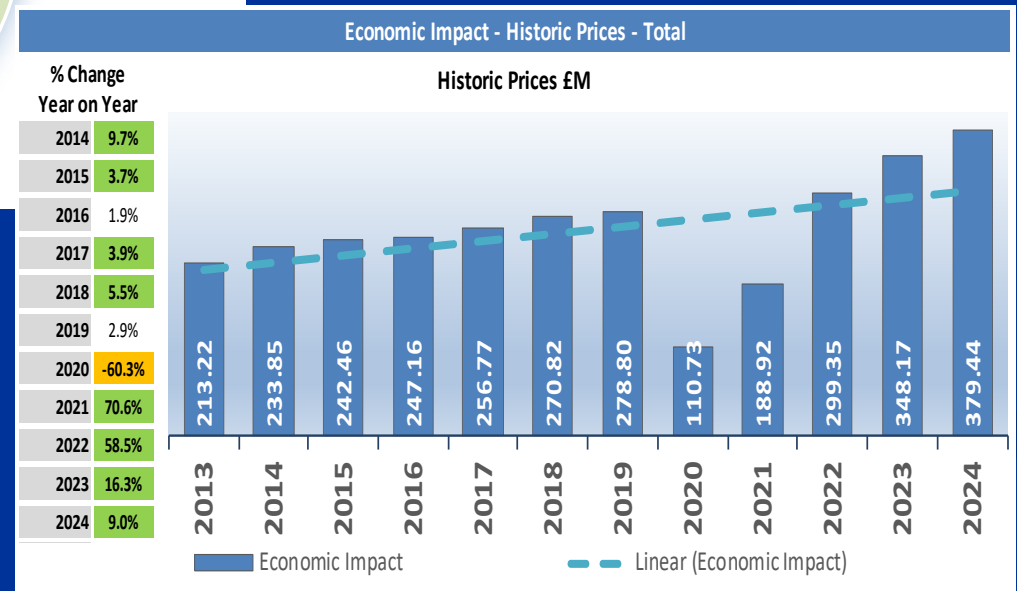
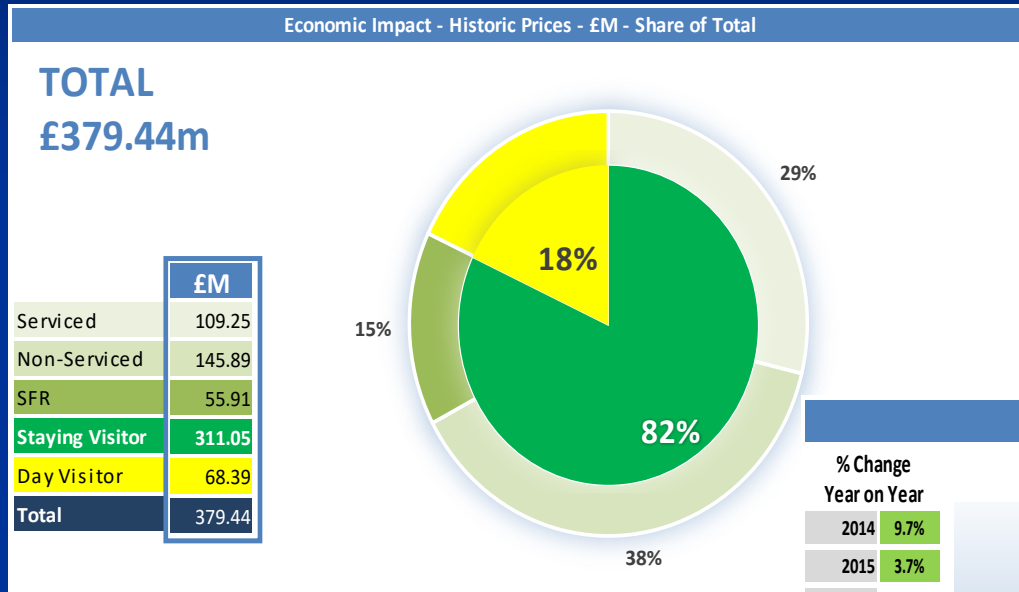
East Lothian Economic Impact

- **£379m economic impact of tourism - up 78% on 2013**
 - **Staying visitor economic impact up 84% over same period; DVs 53%**



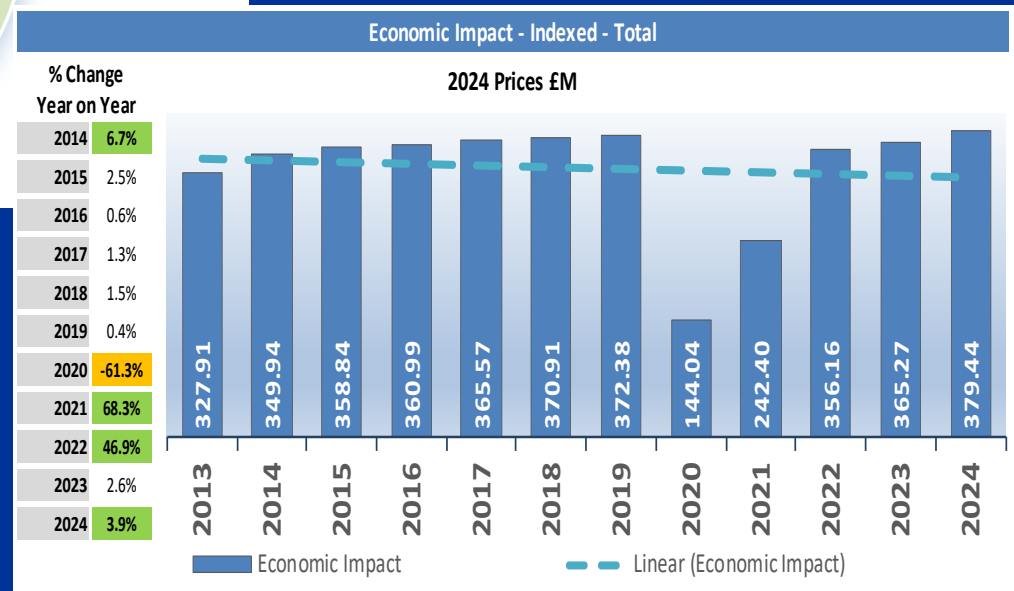
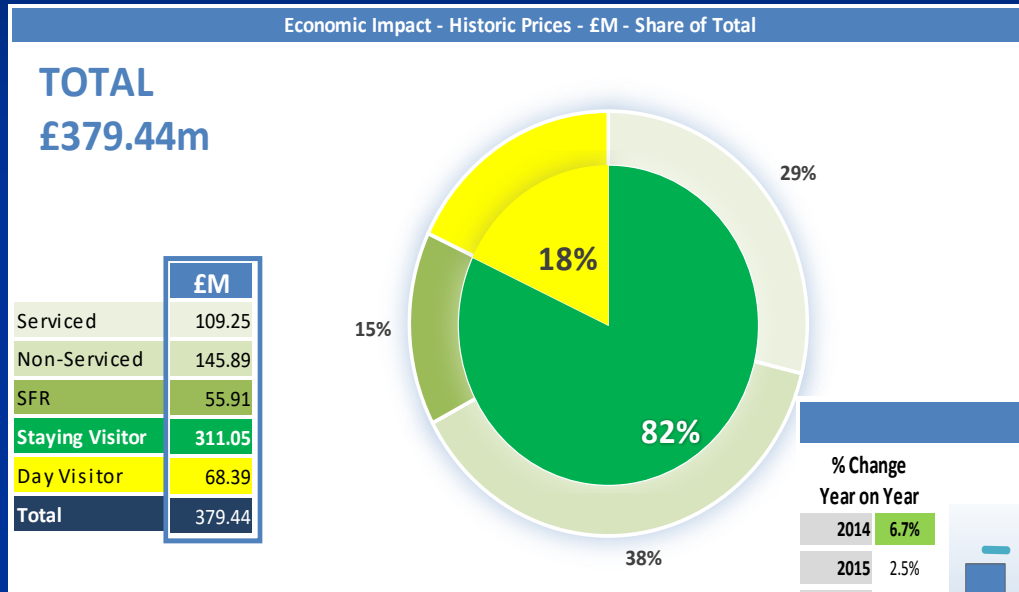
East Lothian Economic Impact

- **£379m economic impact of tourism - up 78% on 2013**
 - **Staying visitor economic impact up 84% over same period; DVs 53%**



East Lothian Economic Impact

- **£379m economic impact of tourism - up 16% on 2013 (indexed)**
- **Staying visitor economic impact up 20% over same period; DVs no change**



East Lothian 2013-2024

Scottish Tourism Economic Activity Monitor (STEAM) Draft Report

■ Trends:

- Increasing staying visitors overall, but split on visitor days / length of stay
- Day visitors stable for pre/post covid, not increasing
- In general, non-serviced is out-performing serviced accommodation (tied to loss of accommodation)
- impact of golfing events (need boost Qs 3 and 4)
- Economic impact is increasing, but so is cost of operating



East Lothian Tourism performance

Richard J MacDonald
Global Tourism Solutions (UK) Ltd