

**REPORT TO:** Policy and Performance Review Committee

**MEETING DATE:** 26 January 2016

**BY:** Depute Chief Executive (Partnerships and Community Services)

**SUBJECT:** East Lothian Tourism Performance

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## **1 PURPOSE**

- 1.1 To outline the recent performance of the East Lothian visitor economy.

## **2 RECOMMENDATIONS**

- 2.1 To note the contents of this report.

## **3 BACKGROUND**

### **Context**

- 3.1 The significance of tourism to the East Lothian economy, employing 9% of the workforce, is reflected in the East Lothian Community Planning Economic Development Strategy with raising awareness of the county and joining up opportunities, encouraging visitors to stay longer and spend more, cross-marketing with Edinburgh and exploiting untapped opportunities all detailed as priority actions under Strategic Objective 2, *to be Scotland's leading coastal, leisure and food & drink destination* (see Appendix 1). Also, the Council Plan 2015-17 refers to the strategy and to the regeneration of town centres in particular that impact on the tourism offering.
- 3.2 Immediately after strategy approval in October 2012, a Tourism Implementation Plan, incorporating Food & Drink, was developed and monitored but given the uniqueness and attention given to tourism, as well as the National Tourism 2020 Strategy, the East Lothian Tourism Action Plan was developed for 2015-18 with annual priority updates. Developing these plans has provided the opportunity to engage with industry representatives through means such as meetings, workshops and networking and to take account of national targets and regional priorities, including focused years. The draft 2016 plan is attached to this report, Appendix 2, for information.

- 3.3 Key to tourism and highlighted in SO2 of the Economic Development Strategy is proximity to Edinburgh and capitalising on the number of visitors visiting the city. The proposed Edinburgh and South East Scotland City Region Deal will provide opportunities for closer engagement to maximise culture and tourism across south-east Scotland. Also, through film tourism and project development there is ongoing engagement with Marketing Edinburgh and City of Edinburgh Council tourism colleagues.
- 3.4 VisitScotland's role is '*to grow and develop Scotland's visitor economy sustainably through our core activity of marketing and events and by working in partnership with businesses and communities*' with the objective of contributing to the National Tourism 2020 Strategy ambition of growing tourism revenues by £1bn by 2020 from a baseline of £4.5bn. East Lothian Council no longer pays an annual subscription to VisitScotland, rather the Council has an agreement to deliver tourist information in partnership, detailed at 3.24, and to develop where appropriate joint initiatives with VisitScotland and other partners – such as familiarisation trips for tour operators and media, and a shared presence at exhibitions and events. East Lothian Council and industry partners meet with the VisitScotland Regional Director on a regular basis. In relation to industry engagement with VisitScotland, 259 East Lothian businesses are listed on the [www.visitscotland.com](http://www.visitscotland.com) website, 120 are members of Quality Assurance schemes and 49 of the various Welcome Schemes, detailed below.

VisitScotland Quality Assurance Scheme membership – East Lothian

<b>QA</b>	
Caravan & Camping	8
Hotels	10
Self Catering	40
Small Serviced	23
Visitor Attractions	39
<b>Total</b>	<b>120</b>

VisitScotland Welcome Schemes membership – East Lothian

<b>Welcome Schemes</b>	
Anglers Welcome	1
Children Welcome	2
Classic Cars Welcome	1
Cyclists Welcome	12
Field Sports Welcome	3
Golfers Welcome	20
Walkers Welcome	10
<b>Total</b>	<b>49</b>

- 3.5 East Lothian Council is also represented on the Area Tourism Partnership for Edinburgh and the Lothians encouraging co-operation across the City Region - for example, support from the VisitScotland Growth Fund allowed East Lothian, Midlothian and West Lothian Councils and industry partners to develop a marketing project aimed at the group travel market and this project will continue in 2016 with agreed financial support from each council. The project has been selected as a showcase for the Growth Fund scheme. Cycle tourism is a joint project currently being explored.

### **Tourism project delivery**

- 3.6 East Lothian Council has four full-time equivalent members of staff delivering on tourism activity although it should be noted that a number of other services contribute to tourism in the county – such as Sport Leisure & Countryside, Community Partnerships (Arts, Museums) and Transportation. The plan to promote John Muir through the John Muir Way, the John Muir Birthplace and linked environmental and education projects as well as the involvement of Countryside, Tourism and Transportation in planning and delivering the first Big Nature Festival to be held at Levenhall Links in May 2015 are examples of this partnership approach.
- 3.7 The current budget for tourism support is £390,000 which is used to support golf initiatives, signature event sponsorship and other event grants, tourist information, marketing materials, annual conference and strategic initiatives. In supporting tourism, business engagement and the sustainability of and legacy from initiatives are key.
- 3.8 East Lothian Council Economic Development and Business Development staff lead on industry engagement across a number of sectors and this is particularly strong with regard to tourism. The East Lothian Tourism Attractions Group, formed 2005, now has 11 members. The East Lothian Golf Tourism Alliance, established 2005, regarded as an exemplar of industry engagement, has 60 members encompassing golf clubs, accommodation and, special interest attractions. Also, hospitality and food & drink manufacturing businesses engage with the Food & Drink Initiative attending biannual industry steering group meetings, for example - the number of businesses engaged has grown from 113 in 2013 to 118 in 2015. East Lothian Council is also in the process of consulting with businesses to create a unique food & drink Business Improvement District (BID) which would be the first of its kind in the UK and was the, subject of a separate report to Cabinet in December.
- 3.9 Whilst there is no overall East Lothian tourism industry representative body, the industry engagement programme planned for 2016 provides greater opportunity for businesses to network and share ideas and good practice. A specific page on [www.visiteastlothian.org](http://www.visiteastlothian.org) will detail these opportunities to complement and support sectoral group meetings.

- 3.10 In measuring the performance of the East Lothian tourism sector, information is taken from a number of sources. The STEAM (Scottish Tourism Economic Activity Monitor) provides year-on-year trend analysis, detailed here.

Year	Days '000 (Overnight)	Days '000 (Day)	Eco Impact Day '000,000	Eco Impact Overnight '000,000
2011	1,506.13	991.11	41.89	158.27
2012	1,431.76	967.73	42.57	153.31
2013	1527.7	980	44.57	166.21
2014	1586	994	46.44	172.73

The 2015 figures will not be available until mid-2016. An occupancy study is being undertaken by TNS Global for 2015 as part of the STEAM reporting and these figures will also be available in 2016.

- 3.11 Visitor numbers to East Lothian's key attractions is another useful performance indicator:

Attraction	2012	2013	2014	%2013/2014
Seabird Centre	267549	271443	273507	+1%
NMS	47301	43048	41789	-3%
ELC Museums	314850	314491	315296	0%
Glenkinchie	27695	38137	38600	1%
TOTAL	387433	384377	387706	1%

- 3.12 Also, visitor surveys provide an assessment of the characteristics of day and overnight visitors, their perceptions and expenditure. The 2015 Visitor Survey was conducted by LJ Research and used online research for the first time as opposed to solely face-to-face interviews allowing for a more considered view from visitors. Initial findings suggest an increase in the AB demographic to 46% of visitors; 50% of visitors were aged 34-54 (44% in 2011); 71% of visitors came from Scotland and 23% from rest of the UK; the number of day trippers from neighbouring counties increased to 67% (59% 2011). In relation to accommodation, more were staying in rented accommodation – 18% in 2015, 8% in 2011; there was a decrease in those using caravan parks from 39% in 2011 to 31% in 2015. As well as an increase in those using the internet to plan their holiday, there was a rise in the use of *trip advisor* from 1% in 2011 to 15% in 2015.
- 3.13 In relation to marketing activity, today's visitors tend to access information digitally and this equally applies to East Lothian's visitors. In this regard, East Lothian Council has commissioned the development of a Digital Marketing Strategy with the purpose of achieving a competitive edge over other areas and ensuring a capability to deliver across target audiences and media, in line with the VisitScotland digital marketing approach. This strategy will also be used as a tool to raise awareness of and support digital marketing amongst the business base.

- 3.14 Growth in the number of unique visitors to the East Lothian Council-developed websites, [www.visiteastlothian.org](http://www.visiteastlothian.org), [www.golfeastlothian.com](http://www.golfeastlothian.com) and [www.eastlothianfoodanddrink.co.uk](http://www.eastlothianfoodanddrink.co.uk) are indicated below:

<b>Foodanddrinkeastlothian.com</b>	<b>Unique Visitors</b>
2013	38,789
2014	49,764
2015	47,379 (to end November)
<b>Visiteastlothian.org</b>	<b>Unique Visitors</b>
2013	133,323
2014	164,682
2015	151,271 (to end November)
<b>Golfeastlothian.com</b>	<b>Unique Visitors</b>
2013	132,863
2014	109,053
2015	129,782 (to end November)

The websites are continually refreshed with new and updated content and with upcoming events listed. During 2016, in line with digital marketing approach, the websites will be enhanced to enable mobile-responsiveness.

- 3.15 Social media is important in ensuring that awareness of areas and of businesses is continually promoted. East Lothian Council Economic Development & Strategic Investment has set up social media accounts around golf, visit, business and food & drink with the number of followers for these on *facebook* exceeding 4600 and on *twitter* around 9000.
- 3.16 A number of print publications are produced by East Lothian Council Economic Development, principally East Lothian tourism leaflet and special interest brochures as follows:

<b>Publication</b>	<b>When updated</b>	<b>Print run</b>	<b>Where available</b>
Visit EL	annual	20,000	Via EAE, local
EL Golf Guide	annual	10,000	ELGTA, local
Outdoor Guide	2015 (new)	10,000	Via EAE, local
F&D Directory	annual	5,000	Shows, local
EL Film Map	2015	10,000	ELC, ME, local

Leaflets promoting towns rather than individual businesses and produced as result of local initiatives can be supported from the Tourism Grants programme and these are available in local facilities, as per the marketing plan for these.

- 3.17 Golf remains a key priority in East Lothian and the county welcomed the 2015 Aberdeen Asset Management Scottish Open in July and the Prostate Cancer UK 2015 Scottish Seniors' Open in August for the first time. 63,000 visitors attended the AAM Scottish Open and 3500 the

PCUK Scottish Seniors' event. Scotland's Golf Coast, as the branding is known, was prominent during both events and featured on TV coverage. As a sponsor of the AAM Scottish Open, East Lothian Council/Scotland's Golf Coast was featured via on-course board, the tournament programme, website and acknowledgement board. For example, 182 media attended the event and the European Tour website had 1.1m new users in July 2015. Pro-am places were offered to local young people and three outstanding local young golfers benefitted from the interaction with professional golfers, which helps to further develop youth engagement within the sport.

3.18 East Lothian is fortunate to host a wide selection of events that attract visitors from outwith the county. Also, these are held throughout the year and across the county. The key events, held annually and sponsored by East Lothian Council, are:

	<b>Event</b>	<b>Funding Provided</b>	<b>Nos Attended</b>	<b>Economic Impact</b>
<b>2012/13</b>	Dunbar SciFest	Not supported by ELC		
<b>2013/14</b>				
<b>2014/15</b>		8,000.00	5120	£137,978
<b>2012/13</b>	Fringe by the Sea	10,000.00	5741	£659,886
<b>2013/14</b>		18,000.00	6242	£554,192
<b>2014/15</b>		25,000.00	7190	£984,342
<b>2012/13</b>	Lammermuir	10,000.00	4771	Not recorded
<b>2013/14</b>		20,000.00	3525	£311,513
<b>2014/15</b>		20,000.00	3225	£251,252
<b>2012/13</b>	Saltire Festival	35,000.00	5040	£161,092
<b>2013/14</b>		20,000.00	5846	£229,862
<b>2014/15</b>		30,000.00	7026	£674,475
<b>2012/13</b>	Lennoxlove Book Festival	10,000.00	5682	160,000
<b>2013/14</b>		18,000.00	4519	£275,620
<b>2014/15</b>		Not held		
<b>2012/13</b>	NMS Airshow	7860	11300	£527,190
<b>2013/14</b>		Not supported	11134	
<b>2014/15</b>			13540	

Other events that are promoted or supported are the 3 Harbours Arts Festival, the North Berwick Highland Games, Puffin Fest, Disc Golf Championships, Total Warrior, John Muir celebrations. The cycling Tour of Britain was attracted to include East Lothian in the itinerary for one of the two Scottish legs, Edinburgh-Blyth, the first time the event visited East Lothian. It is the biggest professional cycle race in the UK with daily

ITV4 coverage and a global TV audience of 200 million and attracted some of the best and most well known riders in the world, including Bradley Wiggins, Mark Cavendish and Andre Griepel. East Lothian staged both a sprint point in Gifford and a king of the mountain stage point at Redstone Rig and around 5000 watched these cyclists in East Lothian.

- 3.19 As a member of Edinburgh Film Office, part of Marketing Edinburgh, East Lothian benefits from Marketing Edinburgh engagement with the film industry. Recent filming projects in East Lothian include Outlander, the BFG, The Secret Agent and Tommys Honour, as well as still footage for Elle magazine, Tesco Bank and Dobbies.

<b>East Lothian filming</b>	<b>2014</b>	<b>2013</b>	<b>% change</b>
Production queries	93	104	-12
Conversion rate	23	28	-21
Total filming days	77.5	70	11
Value to East Lothian (Spend)	£610,000	£359,900	41

- 3.20 VisitScotland EXPO is Scotland's flagship event for the travel trade and the only travel trade fair in the UK which exclusively promotes Scotland, held on a rotational basis between Edinburgh, Glasgow and Aberdeen. It enables Scottish tourism businesses to promote their products and services to potential buyers from around the globe, welcoming buyers from all sectors of this global industry - coach tour operators, group travel organisers, tourism product wholesalers, specialist and independent tour operators and travel media. The 2015 event took place at the AECC 22nd – 23rd April attended by 240 exhibiting Scottish companies, 322 International Buyers from 23 countries and 137 UK based buyers. In 2015, in line with Growth Fund project, East Lothian, Midlothian and West Lothian exhibited under the banner of Visit the Lothians with Scotland's Golf Coast participating separately. This approach will continue in 2016 when EXPO is held in Edinburgh on the 'Edinburgh and the Lothians Street'. All businesses relevant to the group and travel trade markets are represented and data is collected from appointments and walk- up enquiries and followed up as appropriate post-event.

- 3.21 *Wish you were there* is the title of the marketing campaign used to promote East Lothian at St Andrew Square, Edinburgh in 2012 and 2013 and at the Royal Highland Show and Big Nature Festival in 2015.

	<b>Visitors</b>	<b>Partners</b>	<b>Economic value</b>
2012 St Andrew Sq	150,000	26	£1.1m
2013 St Andrew Sq	234,750	19	£4.9m
2015 BNF	6142	4	£346k
2015 RHS	188,449	8	£47m

- 3.22 Working across the Area Tourism Partnership, Visit East Lothian is part of the promotion to the cruise market docking at both Edinburgh and Fife. The cruise passengers currently arriving are not travelling far when they leave the boat either independently or on organised tours. However the City Region partners continue to highlight what is on offer just outside the city and there may be potential to grow this market in future. Limited resources necessitate a focus on key target markets meantime.
- 3.23 East Lothian Council and community groups have been working with Abellio Scotrail to establish and now develop the Community Rail Partnership. To date a leaflet highlighting the North Berwick line has been produced. In addition under the banner of Visit East Lothian, discussions are underway regarding information provision at key stations and to ensure that businesses can tap into promotional activities such as discounted offers for ticket holders and entry to visitor attractions.
- 3.24 As visitors increasingly rely on social media and the internet for both pre and on-arrival information and accommodation booking, nationally Visitor Information Centres operated by VisitScotland have experienced lower footfall and this has led to the closure of dedicated VIC's across East Lothian. Having a continued information presence in council buildings, in partnership with VisitScotland in delivering on-arrival tourism in East Lothian, (Dunbar Townhouse Museum, the John Gray Centre in Haddington, the Coastal Communities Museum in North Berwick and The Brunton in Musselburgh), with a range of leaflets and maps and a large-scale display map ensures that visitors seeking on-arrival tourist information have a means of doing so without the need for the Council to pay for separate provision and is a cost-effective option given footfall numbers and visitor trends. VisitScotland provides Information points with free literature and leafleting stands as well as regular print deliveries using the online portal, dedicated person of contact for support, access to reference material and training on an *ad hoc* basis.
- 3.25 Also, town centre tourist information and signage have been highlighted as a priority from the Area Partnerships in Dunbar and Haddington in particular and staff have been working with Area Partnerships and Managers on solutions.
- 3.26 East Lothian is promoted at Edinburgh Princes Street and Edinburgh Airport VIC through literature racking for many local attractions and businesses, experienced staff providing face-to-face information, free wifi allowing visitors to access [visitscotland.com](http://visitscotland.com) and regional information, free-of-charge public access terminals and digital interactive kiosk where regional information is available
- 3.27 In response to a suggestion from the North Berwick & District Business Association and North Berwick Community Council, tourist information will be available within *Why Not?* on North Berwick High Street shortly with a PC, leaflet rack and staff available to deal with enquiries. The information provision at The Brunton will be reviewed during 2016.



Economic Development will also be providing tourism businesses with a branded 'Visit East Lothian' leaflet rack, window sticker and selection of council-produced leaflets namely the Golf Guide, Outdoor Guide, Film Map and Visit East Lothian leaflet.

- 3.28 VisitScotland is currently finalising its review of visitor information provision across Scotland of numbers, footfall and digital trends leading to a new approach to on-arrival tourism. VisitScotland acknowledges that the way in which visitors are accessing information has changed dramatically, with many moving away from the traditional channels in favour of online and mobile options including the VisitScotland app for regional information and the organisation will be seeking to work with the industry and partners in future to develop tourism ambassadors within local businesses so that visitors can access information from local experts.
- 3.29 Initiatives scheduled for 2016 include the annual conference at The Brunton on 22 March on the topic of connectivity, welcoming the return visit of the Scottish Seniors' Golf Open to Archerfield, the programme of events outlined above, digital marketing initiatives in line with the new Strategy, the visitor information provision review and implementation, and John Muir activity and promotion, in addition to range of ongoing activity.

#### **4 POLICY IMPLICATIONS**

- 4.1 Key strand of the East Lothian Community Planning Economic Development Strategy 2012-22

#### **5 EQUALITIES IMPACT ASSESSMENT**

- 5.1 This report is not applicable to the well being of equalities groups and Equality Impact Assessment is not required.

#### **6 RESOURCE IMPLICATIONS**

- 6.1 Financial – as per budget
- 6.2 Personnel - as outlined
- 6.3 Other – none

#### **7 BACKGROUND PAPERS**

- 7.1 Draft 2016 Tourism Action Plan, Appendix 2

<b>AUTHOR'S NAME</b>	Susan Smith
<b>DESIGNATION</b>	Team Manager, Economic Development
<b>CONTACT INFO</b>	e-mail <a href="mailto:ssmith@eastlothian.gov.uk">ssmith@eastlothian.gov.uk</a> ; tel 01620 827174
<b>DATE</b>	12 January 2016

## **APPENDIX 1**

### **East Lothian Community Planning Economic Development Strategy, 2012-22:**

#### **SO2: To be Scotland's leading coastal, leisure and food & drink destination**

- Tourism is an important sector for East Lothian with the potential to attract more visitors to stay longer and spend more.
- East Lothian has many good quality tourist attractions but wider awareness of East Lothian as a place to visit is limited because the different offers are not fully joined up. It is important that linkages are made between Visit East Lothian, East Lothian: Scotland's Golf Coast, East Lothian Food & Drink and other marketing/branding used to enhance East Lothian's profile.
- There are real opportunities to develop cross-marketing activities with Edinburgh.
- There are untapped opportunities around wildlife, coast, cycling and walking tourism – which resonates with East Lothian's sustainability aims.

## East Lothian Tourism Action Plan 2016-18

DRAFT

## East Lothian Tourism Action Plan

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## 1. Introduction

Tourism is big business for Scotland, bringing in £4.5 billion annually through overnight stays and in excess of £6.2 billion via day visitors. More than 200,000 jobs are supported through tourism across 20,000 tourism-related businesses (Tourism Scotland 2020)

Building on the success of major events in both 2014 and 2015 through global television coverage of both the Ryder Cup and the Commonwealth Games, as well as ongoing media coverage of key events (T in the Park, The Scottish Open, the Edinburgh Festivals and Hogmanay, Tour of Britain), now is an excellent time to be capitalising on all things Scottish and looking at the lasting legacy of these events and the opportunities they have created in welcoming visitors to the country. Homecoming in 2014 and the subsequent themed years also provide Scotland with opportunities to capitalise on aspects of Scottish culture which will appeal to visitors. Tourism is a wide-ranging sector that impacts on most people and business to some extent in East Lothian. The tourism sector makes a significant contribution to East Lothian's economy, directly employing 2,664 - 10% of the total number working in East Lothian.

East Lothian, with its 40 miles of coastline, rolling countryside, picturesque towns and villages, wide variety of attractions and excellent golf courses, is often referred to as Scotland in miniature. With its close proximity to Edinburgh and good links into the city centre, it attracts a mainly Scottish audience; recent statistics from the 2015 visitor survey show that 71% of all visitors came from Scotland, of which 42% came from Edinburgh, 23% came from the rest of the UK with 6% overseas. Golfers and families are key markets for East Lothian, both offering local businesses opportunities to market themselves at different points of the year. However, seasonality remains a concern for businesses out with the summer and opportunities to extend the season are identified in this plan.

This plan has been developed to help focus activities and actions within the tourism sector that can attract key audiences to the county. It plays to East Lothian's strengths and acknowledges where development and activity should be focused in order to maximise greatest economic return for all those involved. It has been greatly informed by industry engagement and takes account of tourism sectoral priorities and focus.

## 2. Background Research and Aims

The East Lothian Community Planning Economic Development Strategy 2012 to 2022 outlines the importance of tourism to the East Lothian economy with the objective

*'to become Scotland's leading coastal, leisure and food and drink destination'*

As part of this strategy, tourism development plays a major role in contributing to the overall economy with a number of key areas identified to focus on in order to achieve greatest return on investment. As well as being informed by industry groups and influenced by ongoing industry networking, this plan will be subject to ongoing monitoring by industry and public sector agency representatives.

The Community Planning Economic Development Strategy identifies clear areas for growth and it is within these parameters that this action plan identifies projects and opportunities.

**Areas for Growth:**

1. Identify and address gaps in tourism across all industry sectors including golf and food and drink for e.g. resort and brand hotels, increase weekend and evening offering.
2. Develop tourism opportunities and projects around East Lothian's wildlife, coast, cycling, golf and walking. Food and drink trails.
3. Join up different strands of tourism offering e.g. golf, coast, town centres, attractions and food and drink and to develop projects to encourage longer stays and spend higher.
4. Encourage use of national schemes as and when appropriate e.g. Go Rural and initiatives with VisitScotland such as themed years.

Measurements made in this action plan will, where appropriate, be able to influence and contribute to the National Strategy 'Tourism Scotland 2020' which outlines the ambitious plans for developing Scotland *as 'a destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people'*.

Today, Scotland is competing in a global tourism market, with the customer being able to access many worldwide locations. Wherever possible, this action plan identifies Key Performance Indicators which directly link to those identified by the Scottish Tourism Alliance in the national strategy such as the value of overnight visitors, employment in the tourism sector and satisfaction levels amongst visitors.

A number of tourist markets are 'warm' to Scotland and are known for their repeat visits and interest in Scotland primarily rest of UK made 6,000,000 trips to Scotland and 6,510,000 trips were made by those residing in Scotland holidaying at home. The remaining visitors were from overseas making 2,700,000 trips in 2014 (VisitScotland). Others are 'new', keen to discover new places and are classed as 'emerging' and the potential for this sector could be enormous for Scotland. This plan focuses on developing the overall experience for visitors identified as 'warm' to Scotland who in turn will be more likely to visit East Lothian, ensuring that at each key point of their stay visitors' expectations are met and exceeded.

## 2.1 East Lothian SWOT analysis, identifying key strengths, weaknesses, opportunities and threats of the East Lothian tourism economy.

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Golf</li> <li>Coastline</li> <li>Proximity to Edinburgh</li> <li>Accommodation mix</li> <li>Good quality food and drink</li> <li>Award winning tourist attractions</li> <li>Good coastal rail links</li> <li>Growing number of festivals and events</li> <li>Food and drink industry engagement</li> <li>Heritage resources</li> <li>Number of quality visitor attractions</li> <li>Environment and wildlife</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>Proximity to Edinburgh</li> <li>A1 – direct route through East Lothian to Edinburgh and south</li> <li>Lack of larger hotels suitable for group travel</li> <li>Public transport provision within East Lothian</li> <li>Inconsistent industry engagement</li> <li>Awareness amongst potential visitors</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>A1 –quick road links to Newcastle and south, Edinburgh and Newcastle airports</li> <li>Emerging markets to Scotland</li> <li>New airline routes to Edinburgh Airport</li> <li>Wildlife tourism</li> <li>John Muir Way Outdoor tourism – cycling, water sports, walking</li> <li>TV and film locations and filming</li> <li>Year of Innovation, Design and Technology future themed years</li> <li>Community Rail Partnership</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>Potential closure of accommodation</li> <li>Downturn in the local economy</li> <li>Exchange rate fluctuations</li> <li>Bad weather during summer months</li> <li>Sustainability of festivals and events</li> <li>Upturn in overseas travel</li> <li>Disease and terrorism deterring travellers.</li> <li>Reduction in number of visitors to golf clubs – members favoured</li> </ul>

## 2.2 Value of Tourism Statistical information

East Lothian Council subscribes to STEAM an annual report compiled by GTS (Global Tourism Solutions) looking at the economic impacts of tourism and giving a comparison year-on-year. The most recent complete 12 month report for 2014 highlights general recovery from the global recession across tracked trends, visitor numbers are on the increase as well as economic impact. Specifically visitor numbers increased by 1.1% from 2013 to 2014, Overnight visitors to East Lothian during 2014 rose by 3.9% on the previous year, Economic impact from Tourism rose from 3.9% from 2013 to 2014 to 8.39 million.

The last comprehensive Visitor Survey was undertaken in 2015 by LJ Research. The key findings are:

- The age profile of visitors to East Lothian was broadly in line with the average profile for visitors to Scotland, although East Lothian had slightly more visitors aged 25-34 years. 67% were aged between 35 and 64 years, 22% were under 35 years, 44% were 35-54 years.
- In line with most tourism surveys, the majority of visitors to East Lothian were in the ABC1 social classes, with 57% falling within this socio-economic grouping.

- The most common grouping was Empty Nesters (44%), followed by Families (32%) and then Independents (11%). This picture is in line with the slightly older age profile of visitors.
- The average party size of visitors was just under 3 people. The most common party sizes were couples and then groups of four
- The vast majority of visitors (92%) were from the UK, with 74% of these from elsewhere in Scotland.
- 52% of visitors were on a day trip from home. 32% were on holiday away from home, while 6% were on holiday visiting friends and 9% on holiday visiting relatives.
- The main type of accommodation used by overnight visitors was staying with friends or relatives (29%). 25% were staying in caravans/motor homes. 16% were staying in hotels and 8% using bed and breakfasts. 8% stayed in self-catering accommodation.
- The average spend was £49.08 per person per day (including accommodation)

#### Research from The Open, 2013, by Sheffield Hallam University

Sheffield Hallam University was commissioned to undertake an economic impact evaluation of The Open in 2013. The direct economic impact is summarised in the table below. The additional visitor and organisational expenditure in East Lothian and Scotland is estimated at £13.44m and £25.63m respectively. The estimated economic impact of spectator spending on the City of Edinburgh amounts to £4.34m.

**Table 6: Direct economic impact summary**

Group	East Lothian	City of Edinburgh	Scotland
Spectators	£ 6.81m	£ 4.34m	£ 10.01m
Golfers & entourages	£ 1.32m	£ -	£ 1.32m
Event staff	£ 2.45m	£ -	£ 2.99m
Media	£ 0.98m	£ -	£ 1.59m
Patrons	£ 1.14m	£ -	£ 1.70m
Organisers	£ 0.73m	£ -	£ 8.02m
<b>Direct Economic Impact</b>	<b>£ 13.44m</b>	<b>£ 4.34m</b>	<b>£ 25.63m</b>

#### Total Economic Impact

Using an output multiplier of 1.31 the total economic impact of The 2013 Open on East Lothian is estimated at **£17.60m<sup>1</sup>**. For the City of Edinburgh the total impact is estimated to be **£6.76m<sup>2</sup>** using a multiplier of 1.56; the total combined impact of The Open on the two levels of geography amounts to **£24.36m**. The corresponding estimate for Scotland using a multiplier of 1.65 is **£42.28m<sup>3</sup>**.

#### Scottish Open 2015

<sup>1</sup> The output multiplier for East Lothian is assumed to be the same as for Fife in 2010, which came from The Scottish Tourism Multiplier Study.

<sup>2</sup> For Edinburgh we have derived 1.56 from input/output tables and data provided by City economists.

<sup>3</sup> The output multiplier for Scotland is based on the 2004 Scottish Government Input-Output Tables for the whole economy and is consistent with the figure used for Scotland in 2010.



In July 2015, the Aberdeen Asset Management Scottish Open was held at Gullane Golf Club the event was well attended with 63,030 spectators. It had excellent media coverage including global TV coverage including the US, equating to \$108,111,747 global gross media equivalency. Social media also worked well with over a 4 million reach on both Twitter and Facebook

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### 3. Visitor Types to East Lothian

Updated research undertaken by VisitScotland has shown new categories of visitors to Scotland, making it easier to target marketing to appropriate audiences keen to visit Scotland. By using this information and cross referencing it with local data gleaned from visitor surveys and economic impact studies, this now provides a fairly strong position to use the data from VisitScotland to East Lothian's advantage – getting to know the visitor types most likely to visit East Lothian and using the information accordingly to help influence projects and marketing.

VisitScotland's segmentation model acknowledges changes to visitor behaviour in finding a holiday and booking it. By using this information, we are then able to look at consumer activities in a more rounded and encompassing way, allowing us to target communications and marketing to achieve a higher return on investment and success rate in visitor engagement with each campaign.

#### 3.1 Key Warm Contacts to East Lothian

Adventure Seekers

*"Adventure Seekers want an active holiday where they can enjoy both outdoor and cultural activities"*  
VisitScotland 2014.

Those identified as Adventure Seekers are interested in sports and adventure. A younger age profile with over half under 35 years, they have a interest in trying new things and experiencing activities and the outdoors. With a keen interest in adventure sports and cultural activities (e.g. castles, monuments and film locations) Adventure Seekers are an ideal segment for East Lothian's growing water sports and outdoor activities market to target. Marketing the outdoors as well as pushing the film and TV locations in the area would be relevant to this audience.

#### 3.2 Engaged Sightseers

*"They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature"*  
VisitScotland 2014.

Those identified as Engaged Sightseers are a slightly older age profile, 57% over 55 years with the majority based in England 79% (26% in the North of England) This market segment enjoy travelling and general sightseeing. Historical places as well as scenery are top priorities when choosing a destination. This category is also the most likely to go on coach tours, making them an ideal target market for the group leisure market. Opportunities to develop further links across the Lothians for the group leisure market would present the most effective means to market to this segment.

#### 3.3 Food Loving Culturalists

*"Food Loving Culturalists will seek out a relaxing holiday experience where they can enjoy great food and drink and engaging cultural activities"* VisitScotland 2014

This market segment is seen as influential amongst their friends, they enjoy food and drink and look for food and drink experiences to complement their holiday. An affluent group, they enjoy taking short breaks within the UK, the majority of them are based in England 81%. Quality, authentic experiences are key to this group's holiday choices.

High end accommodation appeals to this category alongside great food and drink experiences.

Opportunities to market to this affluent consumer through a variety of mediums, mixing the quality accommodation on offer in East Lothian with the East Lothian food and drink brand will be key to targeting this group.

### 3.4 Natural Advocates

*“Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breathtaking scenery, a connection with nature and the chance to get away from it all”* VisitScotland 2014. This group are the most keen to holiday in Scotland, they are repeat visitors to Scotland. (67% are regular visitors and many are well connected to Scotland – often visiting friends and family or with links to the Scottish diaspora). This group therefore should be the easier ‘sell’ compared to the other segments. They tend to be less adventurous than the other segments identified for East Lothian and enjoy a relaxing outdoor break. Scotland is often the first choice for their main holiday. Opportunities to showcase East Lothian’s scenery, historical attractions and nature would appeal to this group. Walking and the outdoors are favoured activities, opportunities linked to the John Muir Way, walking and the East Lothian tourism attractions could provide excellent holiday choices.

### SUMMARY

The outcomes of this Action Plan are clearly defined at the outset and link directly to the areas for growth as identified in the East Lothian Community Planning Economic Development Strategy so that they can contribute to the overall objective *‘to become Scotland’s leading coastal, leisure and food and drink destination’*. This action plan will also help to define and influence new projects and initiatives that will deliver that overall objective.

- To offer a range of events, activities and tourism experiences that clearly place East Lothian on the list of must-see places in Scotland.
- To extend the tourist season, making East Lothian a desirable destination throughout the year.
- To ensure that all visitors to East Lothian receive a quality and authentic experience.
- To develop Scotland’s Golf Coast as an internationally-recognised brand.

## 4. East Lothian’s Key Features

### 4.1 Events

There are currently a number of key events across East Lothian which attract visitors from out with the county, namely Fringe by the Sea, Lammermuir Festival, Dunbar Sci Fest, 3 Harbours Festival and the Airshow.

In 2014 these festivals provided an economic impact of more than £2.1 million. These festivals provide opportunities to bring in additional visitors to communities and businesses throughout the year and to encourage overnight stays and knock-on to business as a result. There exists the opportunity to develop events outwith the main tourist season to help to address the imbalance of visitors during summer and winter. The Saltire Festival, held annually in November attracting in 2015 7216 visitors (3% up on the previous year), of which 60% were from out with East Lothian 36% of The Saltire Festival audience stay overnight and overall it has an economic impact of £738,792.

Further development work with the festivals individually and as a collective cooperative continues, including means of using events to extend visitor stays and to address seasonality. The East Lothian Festivals Group has been established in East Lothian and a way forward in partnership with East Lothian

Council is currently being explored, particularly to look at maximising the economic impact of events to the wider community. The grants programme to both small and larger events will continue in 2016 and will specifically link to Year of Innovation, Architecture and Design

Large-scale events such as The Open in 2013, the Scottish Open in 2015 and Tour of Britain, generate excellent media coverage and opportunities to attract events of this scale will be investigated. Developing the legacy from these events is critical to capitalise on the exposure created to ensure continued economic growth. The continued use of the Wish You Were There banner and East Lothian, Edinburgh's Coast and Countryside will be used at all events where East Lothian Council is a partner, this will ensure the continued exposure of the brand to the public.

#### **4.2 National Opportunities and Initiatives**

2016 is Scotland's Year of Innovation Architecture and Design, a Scottish Government Initiative delivered by both VisitScotland and Event Scotland. The year will provide focus and activity linked to the themed year with events and opportunities for local businesses to engage with visitors National marketing campaigns will take place throughout the year and provide opportunities for businesses to utilise national marketing to help promote their own campaign or event. The Year of Innovation Architecture and Design presents East Lothian with multiple opportunities to develop both existing projects and new initiatives to showcase East Lothian's key strengths in the fields of Architecture, Design and Innovation to attract visitors to East Lothian during the next 12 months. Looking ahead it is imperative that we are ahead of the game in maximising all opportunities for 2017 and beyond with 'Year of History, Heritage and Archaeology' in 2017 and 'Year of Young People' in 2018 and ensure that a full programme of activities linked to each year is on offer.

Event Scotland and VisitScotland funding streams provide both East Lothian Council and businesses and organisations in East Lothian with options for new and existing projects and events. East Lothian Council will continue to work with public agencies in securing funding for large-scale events and marketing projects for East Lothian and support businesses and business groupings in securing such external funding

East Lothian will continue to play an active role in the Area Tourism Partnership facilitated by VisitScotland and with partners across the Lothians including both public and private organisations, City of Edinburgh Council, Midlothian Council, West Lothian Council and Marketing Edinburgh. Opportunities for joint projects and collaboration can be developed in this forum. An excellent example of joint working during 2014/15 is the Lothians group travel project, a partnership project led by the three Lothian councils and private sector partners from across the three areas. The project was successful in securing Growth Funding from VisitScotland to create opportunities in attracting group travel to the Lothians, including developing a new logo and website as well as attendance at relevant trade shows and a familiarisation visit by key tour operators. This project will continue into 2016 with the Lothians working jointly again in attendance at trade shows and marketing and advertising as a region to the group travel market.

East Lothian Council and partners will continue to work with relevant national agencies in promoting tourism in East Lothian, in particular with VisitScotland at Expo in 2016, where Edinburgh is the host as well as the focus years 2016-2018. Other key agencies which will provide relevant sources of information and funding are Scottish National Heritage, Scottish Enterprise, Creative Scotland and Skills Development Scotland. This action plan will keep abreast of new developments and funding streams as and when they become available and ensure that the East Lothian tourism industry is fully aware of what opportunities are available.

#### **4.3 Golf**

Golf is the key tourism driver for the area - currently it is estimated to bring 75,000 visitors to the area annually returning an estimated economic impact of £10 million (East Lothian Golf Tourism Alliance). Golf

tourists are extremely valuable to the economy - with every £1 spent on-course, another £4 is spent off course on accommodation, food and drink and other activities. *JB to update*

Current key markets to East Lothian are predominantly Scotland, followed by the rest of UK (approx 80% of total visitor numbers), Northern Europe, Scandinavia and Germany. US and Canada are an emerging market and must be viewed as a potential key economic driver for the future. Further work is required to realise this potential.

Key priorities for golf tourism will be to maximise the legacy of the Scottish Open in July 2015, consolidating existing markets such as the UK and Europe, whilst achieving further market penetration in the emerging markets of the US. Greater engagement with the golf travel trade is key as is cooperative working locally in ensuring a consistent marketing message and working to establish greater sustainability across the golf product. The East Lothian Golf Tourism Alliance, 60+ private sector businesses (JB to confirm) and East Lothian Council, will continue to be the driving force behind golf marketing and promotion and will actively seek new members to widen the group's appeal in taking forward golf initiatives.

Seasonality is also a key issue with the golf market, despite many of the courses being playable during the winter months and opportunities to exploit this when so many courses are unplayable will be explored. The family golf market offers this potential with many golfers now holidaying with their families. This is an exciting market to capitalise on for East Lothian, as both markets as stand-alone audiences are key to the local tourism economy.

#### **4.4 Day visitors**

Day visitors continue to be one of East Lothian's key markets. Research from the 2015 visitor survey shows that 68% of visitors were on a day trip to East Lothian. Increasing repeat visits and spend to this market are key. Initiatives and projects which help to raise the profile of East Lothian to a regional market, specifically those within easy reach of East Lothian (approximately 1-2 hours' drive time), will be developed with both the East Lothian Tourism Attractions Group (ELTAG) and the hospitality sector through its food and drink offering. The local day trip market can provide a key income stream all year round. Partnership arrangements are in place with both the Tourism Attractions Group and Food & Drink Producers and Hospitality groups between private operators and the council, each group has identified key actions for the next 12- 18 months which feed directly into this plan. Opportunities to increase dispersal of visitors encourage repeat visits and prolong stays to the county are a priority. Initiatives in the past developed by East Lothian Council to raise awareness of the county have been very successful, including Wish You Were There in St Andrew Square in Edinburgh in 2012 and 2013, attendance at Royal Highland and BBC Good Food Shows and working with the R&A and European Tour for golf events during The Open and Ryder Cup. Building on the success of these events and developing new, innovative ways of presenting East Lothian to the local market will be addressed. Opportunities to increase visitors coming to East Lothian by rail can be addressed as part of the Community Rail Partnership and projects developed to help increase footfall by rail to key seaside towns of North Berwick and Dunbar.

#### **4.5 Flexibility and anticipating customer needs; Digital Marketing**

With increasing use of social media-based platforms and social media's part in day-to-day activities, its role as an influential tool in choosing a holiday destination is growing.

Information from 'Digital Portal' recently reported statistics from eMarketer 2013 showing approximately 1/5<sup>th</sup> of leisure travellers use social media as inspiration for planning a holiday. Whilst on holiday, visitors continue to use social media to update and inform friends and family of their trip. Statistics shown on Sticky Media show 85% of visitors now use smartphones on holiday and 46% use tablets.

Online travel forums and social media travel sites are now commonplace and key to many visitors' decision-making process when booking a holiday. The largest of these sites, Trip Advisor, has more than 190 million reviews and opinions from travellers across the world and reviews of over 4.4 million businesses in 145,000 destinations worldwide. At the end of 2015 Visit Scotland announced that they are the first country in Europe to partner with Trip Advisor, indeed findings from the 2015 East Lothian Visitor Survey show that 15% of visitors to East Lothian have consulted Trip Advisor. Love them or hate them, social media platforms are 24/7. Visitors now have information readily available on all aspects of their trip and businesses need to be fully aware of the impact, both positively and negatively, they can have on their business. Social media as a marketing tool can also be extremely effective, offering businesses excellent opportunities to engage with customers instantly and generate interest and responses from customers, which can help stimulate interest and focus on a particular campaign. The use of social media as a source of information when planning a visit to East Lothian doubled from 2011 to 2015 (LJ Research) Many companies now use online social media platforms as key components to their marketing mix alongside more traditional forms of marketing. 'Visiteastlothian' "East Lothian Food and Drink" and 'golfeastlothian' has for sometime been using both Facebook and Twitter in generating interest in events and activities in East Lothian. East Lothian Council has commissioned the development of the Digital Marketing Strategy and this will be finalised in mid-2016 as a means of exploiting the current and future digital marketing presence for East Lothian and its businesses.

#### 4.6 Film Tourism

Over recent years, a number of high profile television and film productions have been filmed in East Lothian, showcasing the county to audiences all over the world. Film tourism, whereby visitors are drawn to visit a location they have seen in a film has increased. Research undertaken has seen a dramatic increase in visitors for many locations when seen in a film or on television. Figures presented by Visit Britain state 40% of people contemplating Britain as a destination are likely to visit places they have seen in a film. Glencoe saw an increase in visitors by 40% following Skyfall and one million visitors visit the Warner brothers Studio sets of Harry Potter annually. East Lothian Council will continue to work closely with Edinburgh Film Office to promote East Lothian as a film destination. Recent productions in East Lothian during 2015 include Outlander, The BFG, Tommy's Honour and The Secret Agent.

	<b>2014</b>	<b>2013</b>	<b>% Difference to 2013</b>
Production enquiries	542	502	+8%
Projects completed in 2014	361	342	+6%
Conversion rate	67%	68%	--1%
Total filming days	1076	1016	+6%
Average productions			
Filming per day	2.9	2.8	

#### 4.7 Wildlife/Outdoor Tourism

The 'Outdoors' is a key selling point for East Lothian and opportunities to capitalise on both wildlife and the natural landscape will be explored. Officially recognised as the largest Gannet colony in the world, the Bass Rock stands as an iconic landmark for East Lothian. John Muir, born in Dunbar, is acknowledged as founding father of conservation and means of promoting East Lothian through his ethos and projects bearing his name are undertaken locally and nationally. For example, the John Muir Way offers excellent opportunities to market the coastline to walkers and cyclists; vents new to the county including the Big Nature Festival in

Musselburgh provide an excellent platform for targeting new markets keen to explore the outdoors and what nature has to offer. With Edinburgh on our doorstep, opportunities to play to our strengths as 'Edinburgh's Coast and Countryside' are being developed. An Outdoor Guide for East Lothian has been produced for 2016; the guide will be distributed throughout East Lothian and will provide visitors to the area with information on the many outdoor activities that can be undertaken in the county, including walking, water sports, cycling and horse riding.

#### **4.8 Business Tourism**

Business Tourism is a growth market for East Lothian, with many venues particularly suited to the MICE (Meetings, Incentives, Conferences and Exhibitions) audience. Incentive travel is now at a four year high following the global recession. This presents ideal opportunities for many businesses in East Lothian who offer venues and experiences suitable to business clients, or as an add-on to large scale conferences in Edinburgh. Another key area is the wedding market. There are many suitable locations and venues across the area that currently operate as a wedding venue or have the potential to do so. This could also help address seasonality in many venues that look to attract visitors out with the summer season. An initial focus group was established in 2015 looking at both business and wedding tourism group, developing this group and actions will be a priority, key initiatives will fed into this overall plan. *JB to update*

#### **5. Measuring Success**

Projects identified in this Action Plan are measureable and complement the overall plan to increase growth in the tourism sector. The Action Plan will be reviewed annually and will be clearly defined with achievable projects. Projects will be delivered either by the public sector or industry and in partnership.

The Action Plan review will be led by East Lothian Council in partnership with the tourism industry, namely, golf, accommodation, attractions, hospitality and events, and individual business input.

## 6. Action Plan

This action plan shows specific actions and projects which will be led by East Lothian Council and partners and outcomes will link to areas for growth as identified in the East Lothian Community Planning Economic Strategy 2012-2022.

### Areas for Growth

#### 1. Identify and address gaps in tourism across all industry sectors including golf and food and drink for e.g. resort and brand hotels, increase weekend and evening offer

What we will do	Lead Partner	Outputs/outcomes	Timing/date	Measurement
Hold annual tourism conference for tourism businesses, which provides interesting and relevant speakers and encourages business interaction and networking	East Lothian Council	Themed conference delivered (Denvir Marketing appointed to oversee 2016 conference)	Annual Feb/Mar	Delegates attending, (84-2014), feedback from delegates New projects potentially developed through workshops/networking opportunities TBC
Ebulletins to registered consumers targeted to specific events and themes predetermined by the East Lothian Tourism Attractions Group	ELTAG	Regular ebulletins to mailing list to encourage visits to the county and to stimulate interest and awareness of the county to potential visitors. Encourage repeat visitors and highlight events and seasonal offers.	Monthly	Increased numbers on mailing list (314-Dec 2015) % number of opens (32% Dec 2015)
Work in partnership with East Lothian Tourism Attractions group	East Lothian Council/ELTAG	Action plan developed Events attended – local events to attraction local/regional market (Airshow, Haddington Agricultural show Projects developed and achieved	ongoing	Action plan in place 2015-2017 New leaflet, pull up banner TV advertising Annual fund of £9,600 (2016)



## Appendix 2

		throughout year – STV Advertising planned for 2016 Marketing fund established for joint marketing as identified in plan Sustained membership		11 members recent new member –Foxlake,2016.
Eat East Lothian, fortnight of dining offers in East Lothian restaurants to help stimulate business during quieter months of the year	East Lothian Council	Increased business to the restaurants during quieter months of the year Marketing campaign including bus shelter advertising, local press and radio.	Annual Feb	Number of businesses participating - 35 (2015) 2016 -TBC Prize fund of £2,000 Vouchers spent
Attend golf events in both the UK and overseas to attract new golfers to East Lothian and attract tour operators to send visitors to East Lothian	ELGTA	Golf events, new events relevant to East Lothian – more detail JB to update		New contacts made New bookings at golf courses – measurable? Fam trips linked to golf shows – measure? Media coverage – how?
Grow group leisure market, including coach tourism market and younger explorer market	West Lothian Council, East Lothian Council, Midlothian Council and private sector partners	Increase coach and group leisure visitors to the Lothians working with private sector partners in developing packages and offers relevant to the group market Fam trips across Lothian region, overnight stays in each local authority area and relevant trade shows	2015/16	2015 Growth Fund analysis: Attendance at trade shows – Expo 2015, British Tourism and Travel Trade Show in Birmingham, 50+ show, Group Leisure and Travel Show 29 industry partners 28% visitor number increase since project started ROI - Number of brochures 1,000produced 2 fam trips held to date

## Appendix 2

				(2015) 66% plan on brining groups to the Lothians
Engagement with Visit East Lothian businesses	East Lothian Council	Develop and promote programme of networking and training opportunities throughout year to encourage networking and support business development Bespoke page on new Visit East Lothian website	Christmas networking event Dec 2015	Businesses engaged – 370 registered through vel.org Projects developed Ebulletin – 370 businesses - % number of opens (57% Dec '15) 40 attendees – Christmas event. 2 Brand workshops held 2015
Visit Scotland Expo, attendance at trade show in Edinburgh to attract travel trade to the Lothians	East Lothian Council, Midlothian Council, West Lothian Council	Joint attendance at Expo Edinburgh to cross sell joint group leisure product Raise awareness of Lothians group travel product Joint travel stand created	Ongoing Trade show, April 2016	Contacts made – 57 (2015) Number of travel trade making queries to East Lothian and contact made 2016
British Tourism and Travel Show, Birmingham trade show attracting predominantly UK tour operators, key markets for the Lothians group travel project.	East Lothian Council, West Lothian Council, East Lothian Council	Joint attendance at BTTS to cross sell joint group leisure product Joint stand at BTTS 2016	March 2016	Contacts made, Number of travel trade making queries to East Lothian Number of travel trade including East Lothian as part of their offering to visitors
BBC Good Food Show Glasgow, provides opportunities to producers to grow and develop their business throughout the UK	East Lothian Council	Joint promotion of local produce Specific food and drink stand created Establish a food and drink brand for East Lothian in other areas of the UK	November 2016 Ongoing	Number of businesses -7 (2015) Orders made –awaiting feedback Dec 2015 TBC

## Appendix 2

and also promotes East Lothian as a visitor destination		Provide opportunities for small businesses to promote their services and products to catering and retail		Turnover monitored Numbers employed by businesses
Develop online business information – link to VEL above	East Lothian Council	Create specific business related information on vel.org for East Lothian businesses Ebulletins to VEL database	Ongoing Dec/Jan 2016	New content created Number of views of business pages Ebulletin views/engagement
Royal Highland Show  East Lothian Food & Drink stand and sponsorship of cookery demo theatre	East Lothian Council	Joint promotion of local produce Specific food and drink stand created Establish a food and drink brand for East Lothian in other areas of the UK Provide opportunities for small businesses to promote their services and products to the catering and supermarkets.	June 2016	Number of businesses -10 (2015) Orders made- ongoing, Dec 2015 awaiting feedback Turnover monitored Numbers employed by businesses
Film Tourism –promotion of East Lothian as a place to do filming for TV, television and other media.	Film Office - Marketing Edinburgh East Lothian Council	Partnership working to increase opportunities for filming in East Lothian Promotion of East Lothian Film Map Adoption of film charter	Annual report due March 2016	2014 figures Numbers of film enquiries - 93 (20% of total to Film Edinburgh) Number of filming productions 23 /77.5 days Economic Impact of filming in East Lothian £610,000
Visitor survey to gain new market intelligence on visitors to East Lothian	East Lothian Council	Visitor survey 2015 (LJ research commissioned)	April – October 2015 Report due Jan 2016	Visitor profile Spend in area Activity in area Compared to 2011 TBC (final report due end of Jan)
Small grants programme for East	East Lothian Council	Provide grant programme to tourism		Grants awarded £25,893

## Appendix 2

Lothian businesses to develop projects and events linked to Year of Innovation etc		organisations and groups of businesses		15 projects Sponsorship awards 2016 – TBC JB update
Develop new itineraries and packages across East Lothian Council web and social media platforms	East Lothian Council, East Lothian Golf Tourism Alliance, East Lothian Tourism Attractions Group	New packages developed New offers created Regular messages on social media engaging with audience More info		Unique visitors to website Social media 'reach' new likes, followers
STEAM report	STEAM/East Lothian Council	Collation of statistical information annually to inform tourism industry of overall financial performance.	Annual report	Statistics linked to STEAM, comparable to previous years – more info
Occupancy study to determine levels of accommodation occupancy throughout the year, to identify when there is capacity	STEAM/TNS	Accommodation occupancy study for 2015 season.		Occupancy levels accommodation gaps TNS currently undertaking study
Create regular ebulletins for golf	ELGTA	Monthly ebulletins to existing and expanding database, Provide offers and packages to golfers.	Monthly ongoing	New contacts and open reads for emails and click throughs to website.
Develop Festivals group with common aim and purpose.	Festivals Group and ELC	Develop group with key aims and objectives for cooperative working and marketing Regular meetings, create cross promotion and networking opportunities. Joint marketing opportunities developed To be updated	ongoing	Businesses engaged and cooperative formed.
Establish Venues East Lothian	East Lothian Council	Develop working group of businesses interested in developing their business and wedding offering. Develop activities and opportunities for those involved to jointly promote East Lothian as a business and wedding location	ongoing	New business group formed and launched at Expo 2015. Logo developed Website area created on vel.org

		Create a new logo and website area on visiteastlothian.org To be updated		
Develop the East Lothian Digital Marketing Strategy	East Lothian Council	Strategy developed, action plan established, plan taken forward	Tender Dec 2015, completion April 2016	Strategy developed
Redevelopment of visiteastlothian.org	East Lothian Council	Mobile enabled website platform and increased usability, new CRM system	2016	2014- 164,181 unique visitors 2015 -161,738 unique visitors

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## 2. Develop tourism opportunities and projects around East Lothian's wildlife, coast, cycling, golf and walking. Food and drink trails

What we will do	Lead Partner	Outputs/Outcomes	Timing/date	Measurement
Develop an outdoor guide with a lifestyle style for a wider appeal to those who enjoy the outdoors. Includes information on walking, cycling, John Muir, watersports.	East Lothian Council	Lifestyle guide developed 20K copies	Launched at Saltire Festival 2015, distributed 2016	Numbers of guides produced Downloadable from website? Number of downloads Distribution and take up?
Promote seafood trail with East of Scotland – 'East Coast Seafood Experience' link with East Coast councils from Shetland to Borders. The route was developed around harbours and seafood industry to help focus attention on those areas again for visitors and locals.	East Lothian Council with partners from 6 other councils	Website, itineraries, video produced, leaflets for distribution (template for use as and when required for each area) Brand developed.	ongoing	Hits to website 10 businesses engaged in East Lothian Number of leaflets Youtube watches of video Measureable?.
Tourism Event support and capacity-building	East Lothian Festivals Group East Lothian Council	Work with festivals group in developing festivals and events throughout year in attracting visitors and overnight stays, opportunities for cross promotion and selling of East Lothian		Grants provided Attendance at events Economic impact ROI Use figs provided
Develop opportunities linked to promotion of the John Muir Way	East Lothian Council	Develop new walking routes off the John Muir Way to encourage longer stays in East Lothian Work with businesses in Walkers Welcome scheme. Liaise with other partners and organisations	ongoing	New walks developed Number of hits to vel.org Number of Businesses signed up to Walkers and cyclists welcome schemes. New online leaflet created

		<p>in helping to promote the community rail partnership line as a tourism rail route through East Lothian.</p> <p>Refresh of online versions of John Muir Way leaflet.</p> <p>Promotion of John Muir/John Muir Way in Outdoor guide.</p>		
Develop further opportunities with cycle tourism and potential links with Edinburgh, Lothians and Borders	<p>East Lothian Council</p> <p>East Lothian Community Rail Partnership</p> <p>Area Tourism Partnership</p> <p>Abellio</p>	<p>Develop new routes, cyclists welcome, better links with train routes to East Lothian</p> <p>Opportunities for potential cycling events, opportunity for joint project across Lothians and Borders via Area Tourism Partnership</p> <p>Cycling information included in outdoor guide, routes and map</p> <p>Cross working with Abellio to establish information on trains, improvements for those using bikes on trains</p>	ongoing	<p>New routes for vel.org initial discussions with Glenkinchie Distillery Jan 2016.</p> <p>Improved cyclist information and facilities at rail stations</p> <p>East Lothian businesses engaging with Abellio</p> <p>promotion on trains</p> <p>Tour of Britain 2015 – 5,000 spectators in East Lothian.</p>
Capitalise on new flights into Edinburgh Airport and look for opportunities to market to specific airlines and destinations which are 'warm' to East Lothian or provide an opportunity to market to new markets for East Lothian	ELGTA	Pop up exhibition and display at Edinburgh airport prior to the Open JB to update	May 2015	Database collection
Forth Ferry Crossing North Berwick to Anstruther	<p>East Lothian Council</p> <p>Fife Council</p> <p>VisitScotland</p>	<p>Joint marketing of the ferry crossing</p> <p>Joint projects – promotion of walking and cycling in area</p>	2016	<p>Itineraries</p> <p>Website information</p> <p>Visitor numbers via ferry</p>

	Ferry operator			
Redevelop signature events programme	ELC	Design events scheme to ensure greater sustainability for events and better economic impact from events publically funded.		£112,000 provided in sponsorship 2015/16
Promotion of John Muir – through a variety of projects and events to increase footfall into the county	East Lothian Council	Events linked to John Muir Birthday in April	2016	Events established Visitors attending

**3. Join up different strands of tourism offer e.g. golf, coast, town centres and attractions, food and drink and to develop projects to encourage longer stays and spend more**

<b>What we will do</b>	<b>Lead Partner</b>	<b>outputs</b>	<b>Timings/date</b>	<b>Measurement</b>
ELTAG staff pass to encourage cross promotion between attractions	ELTAG	Staff pass developed and T&C's for ELTAG members and front line council staff	None	Passes produced, staff passes used. Uptake of passes info?
Promotion through the brand - Wish you were there	East Lothian Council	Opportunity for marketing and promotion using established brand 'wish you were there'	ongoing	Footfall at events Hits to website Business offer uptakes Number of partners involved.
Increase knowledge of local attractions to day visitors at local events to increase profile	ELTAG	Attendance at key local events – Airshow and Haddington Agricultural Show to capitalise on regional and local market, key to ensuring year round support to attractions.	Spring and Summer 2015	New contacts for e-mailing list
Review of interpretation across county	East Lothian Council	Review and address gaps in interpretation and maps, ensure consistent message is made to visitors	ongoing	Town centre maps produced New interpretation boards



		Ensure quality is consistent across county.		
Develop links with public transport and town centres/tourism attractions to improve offering to visitors and provide better consistent approach to using public transport whilst visiting East Lothian	East Lothian Council, Community Rail Partnership (CRP) Trade Associations	Improvements at rail stations to include better information to those disembarking at stations, activities and outputs as identified in new CRP plan		Information boards, relevant information and signage.
The Saltire Festival	East Lothian Council	Develop festival for 2015 to include multiple events celebrating the Saltire during shoulder months of year, as part of winter festivals programme Feedback on 2015 and plans for 2016	November 2015	Numbers attending event 7216 Event economic impact £738,792
Redevelopment of golfeastlothian.com and visiteastlothian.org	ELC/ELGTA	Redevelop to encourage more visitors and increase engagement with potential visitors and increase conversion rates of visitors both sites to be mobile enabled and updated for Spring 2016	ongoing	Number of unique visitors, data collection, conversions – stats available monthly..
Develop sustainable destination programme more specifically golf courses	ELGTA	Seminar programme led by GEO (Golf Environment Organisation) specifically tailored for East Lothian Update JB	May 2015	Numbers attending, Numbers achieving accreditation.

#### 4. Encourage use of national schemes as and when appropriate e.g. Go Rural and initiatives with VisitScotland, themed years

What we will do	Lead Partner	Outputs/outcomes	Timings/date	Measurement
Work with VisitScotland to improve on arrival information for	East Lothian Council/VisitScotland	Maintain information points in East Lothian (Dunbar, Haddington and North Berwick)	Ongoing	Enquiries/footfall/staff trained

## Appendix 2

visitors.		and continue the dialogue with VisitScotland to identify suitable solutions for information provision within the county –new on arrival information proposal for East Lothian to be adopted for 2016 Meeting to establish on arrival tourism in East Lothian to be arranged 2016		
Scotland’s Taste our Best accreditation.		Encourage new businesses to participate in the scheme, support them through accreditation	Ongoing	Numbers of businesses accredited.
Increase numbers of businesses in joining accredited schemes with VisitScotland	VisitScotland	Numbers of businesses joining VS accredited schemes, walking, golf, attractions, outdoor	Ongoing	Annual measurement of numbers registered. Add info and target
VisitScotland marketing campaign	VisitScotland	Marketing campaign with VisitScotland to attract visitors to East Lothian		Specific KPIs with Visicotland to be agreed when campaign developed.
Community Rail Partnership (CRP)	East Lothian Council and partners	Opportunities for increased visitors via train, develop projects as identified in the CRP action plan which help encourage use of the train by visitors both overnight stays and day visitors.	Ongoing	New leaflet created
Area Tourism Partnership	East Lothian Council Midlothian Council West Lothian Council City of Edinburgh Council/Marketing Edinburgh VisitScotland	Develop new products across the 4 council regions to take forward for joint projects around cycling and also continuation of the group leisure project by Lothians Councils.	ongoing	Growth fund bid made KPIs as identified in the bid.