

EAST LOTHIAN TOURISM ACTION PLAN 2004-2007

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INDEX

	Page
1.0 Introduction	3
2.0 Market Context	3-6
3.0 Aims For The Next Three Years	7-12
3.1 Tourism Marketing	7
3.2 Golf Tourism	8
3.3 Visitor Retention & Dispersal	10
3.4 Business/ Product Development	11

1. INTRODUCTION

This Action Plan has been drawn up to ensure co-ordination, integration and prioritisation of tourism development and tourism marketing activities in East Lothian during the period 2004-2007.

The Action Plan builds upon the outputs of the previous two plans covering the periods 1997-2000 and 2001-2003 and links into local and national tourism and economic and social development strategies.

The Action Plan has been drawn up by representatives of East Lothian Council, East Lothian Tourism Forum, Edinburgh & Lothians Tourist Board and Scottish Enterprise Edinburgh & Lothian taking into account industry needs via consultations with the East Lothian Tourism Forum. It has three strategic objectives:

- To increase the volume and value of tourism in East Lothian.
- To assist the development of existing and new tourism products in East Lothian.
- To assist the development of tourism businesses and individuals working in tourism in East Lothian.

The plan identifies specific objectives and targets in three priority areas:

- Tourism Marketing, including golf tourism
- Visitor Retention and Dispersal
- Product/Business Development

This Action Plan will be reviewed on an annual basis with particular consideration given to the ATB review and the role of the new regional board in implementation.

2. Market Context

Despite difficult national and international market conditions in 2001 and 2002 figures suggest that the tourism sector in Scotland and in particular Edinburgh & Lothians has recovered more quickly than London or other parts of the UK.

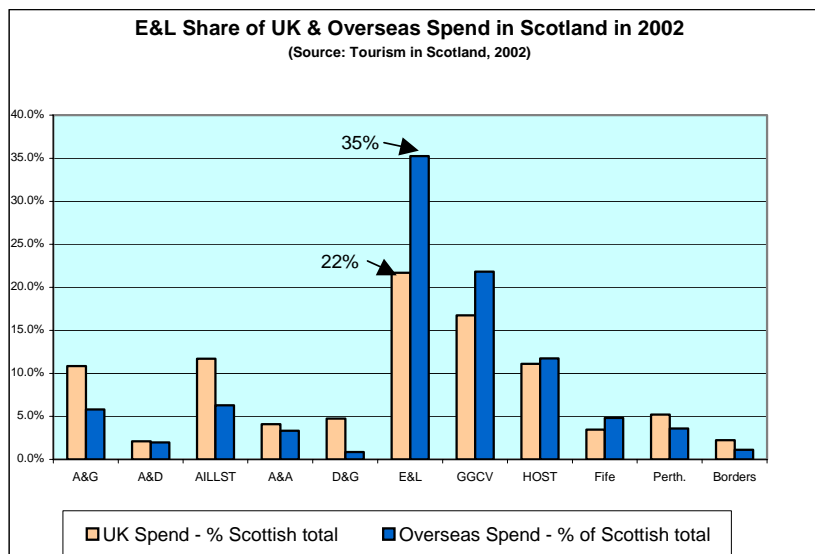
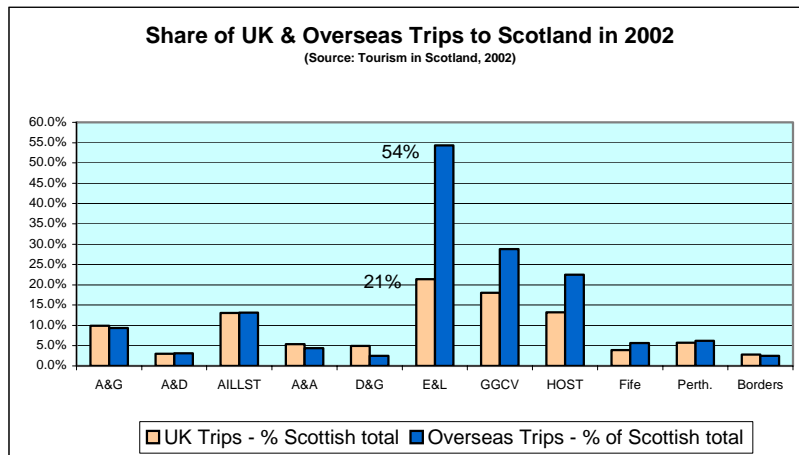
Although long-haul overseas markets have been most affected by the increased threat of terrorism, weak exchange rates, and reduced capacity on long-haul routes, the figures below show that this trend has been counterbalanced, to a certain extent, by a strong demand on UK and short-haul European routes, which is reflected in the continued growth of airlines and passenger traffic at Edinburgh Airport.

In 2002, UK residents took 3.96m trips to Edinburgh and the Lothians, an increase of 7% on the previous year. UK residents spent £798m in the area, an increase of 3% on the previous year.

The volume of overseas trips remained static at 0.87m, although spending was up by 13% on the previous year at £286m.

Edinburgh & Lothians also continues to dominate Scottish tourism figures, receiving the highest proportion of UK and overseas trips and spend to Scotland:

East Lothian Tourism Action Plan 2004 - 2007



Employment generated by tourism in East Lothian:

	Tourism employment	All employment	Tourism as a % of all employment
East Lothian	3,517	25,034*	14%
Edinburgh & Lothians	40,114	427,268*	9%
Scotland	200,021	2,277,921	9%

*These figures are aggregates from which agriculture class 0100(1992 SIC) have been excluded.

Visitors to East Lothian:

East Lothian Council, Midlothian Council and West Lothian Council in partnership with Edinburgh and Lothians Tourist Board and Scottish Enterprise Edinburgh and Lothian commissioned consultants, TNS Travel & Tourism, to conduct a programme

of market research to determine the characteristics of day and overnight visitors to the Lothian region and to establish visitor perceptions of the local tourism product.

This report presents the results of the survey of visitors to East Lothian. A total of 365 face-to-face interviews were undertaken with visitors to the area over the peak period June-November 2003. A summary of the key findings is presented below. A copy of the full report is available to download from www.lothianexchange.net.

Visitor Profile:

- **PURPOSE OF TRIP** - Some 75% of visitors to East Lothian were on a day trip from home. Nearly a quarter of visitors were on holiday away from home (24%), with 7% visiting friends or relatives and 1% for business purposes.
- **PARTY SIZE and AGE** - 46% visiting with one other person, average party size just fewer than 3 people. 21% under 16, 22% 16-34 years, 34% 35-54 years, 24% +55 years. The average age of all visitors to East Lothian was 42 years, somewhat higher than the average age for the Lothians overall (38 years).
- **SOCIAL CLASS** - As in the majority of visitor surveys, most visitors to East Lothian were in the ABC1 social classes with almost three-quarters of visitors (72%) falling within this socio-economic grouping. This relatively upmarket social class profile is best illustrated by comparing it with the Scottish population as a whole, 48% of whom are ABC1s.
- **LIFECYCLE STAGE** - The largest proportions of visitors to East Lothian were empty nesters (43%), with around a quarter being families (27%) and a smaller proportion could be categorised as Independent Adults (13%).
- **ORIGIN** - Overall, nearly four out of five of visitors were from Scotland (78%). Therefore, a much lower proportion came from other parts of the United Kingdom (12%), and a similar proportion of visitors came from overseas (10%). In terms of the Scottish markets: the largest proportion was from Edinburgh (41%) and a tenth were from Strathclyde (10%), and the Borders (8%). A further 4% were visiting East Lothian from the Central belt. Although local residents from the area of interviewing were excluded, some 8% of the visitors to East Lothian were from elsewhere in the Lothians (outside Edinburgh), with 4% visiting from Midlothian and a similar proportion being West Lothian residents (4%). The origin of visitors from areas elsewhere in the UK was very widespread with North (3%), South East England and Yorkshire and Humberside (2% each) as the areas with the highest proportions. Germany was the most common place of residence for European visitors (2%), whilst the USA and Australia were the most popular countries of origin for visitors from the rest of the world (1% each).
- **PREVIOUS VISITS** - Four out of five of visitors to East Lothian were on a repeat visit to the area (80%), whilst 17% were on their first ever visit to the area. Amongst those who had been to East Lothian before, 70% had visited the area earlier the same year.
- **ACCOMMODATION** - Reflecting the importance of camping tourism in East Lothian, the main type of accommodation used by overnight visitors to East Lothian was camping accommodation of some sort (46%), Nearly three out of ten of the visitors to the area were staying with friends and relatives (29%), a lower proportion than for the Lothians overall (40%). A fifth were staying in commercial accommodation such as hotels (11%) and bed and breakfasts and guest houses (9%), again this proportion was somewhat lower than the average for the Lothians (27%).
- **ACTIVITIES** - the majority of respondents undertook non-sporting activities. The main types of activities undertaken were to visit the beach or view the

coastal scenery and general sightseeing and touring (48% and 46% respectively), visits to historical buildings or heritage sites and leisure shopping (23% and 22% each). The most common sporting activities engaged in were: watching a sport event (8%), walking/rambling/hillwalking (7%) and playing golf (2%). **The relatively low proportion of visitors playing golf is due to this activity and other outdoor activities not being specifically targeted.** A further 17% stated that they were visiting East Lothian to eat out and 8% had come to the area specifically to visit the Musselburgh Race Course.

- **VISITOR SATISFACTION** – A 5 point scoring system (5 being very good and 1 being very poor) was used during the survey. Mean score of 4 or more is considered to a good score. Visitor attractions were the most highly rated tourist facility, achieving an overall satisfaction score of 4.46. The second highest rated tourist facility was restaurants and cafés, with an average score of 4.35. *Accommodation* (4.25), *shops* (4.25) and *TICs* (4.21) all had rather similar mean scores. *Pubs* had the lowest mean score of the tourist facilities (4.14), although still rather high. Encouragingly, two very important aspects of the tourism product of East Lothian achieved average satisfaction scores well over 4, *local hospitality* (4.32) and *variety of attractions* (4.28). The satisfaction among visitors to East Lothian was slightly lower for aspects relating to signposting and transport provision, with mean scores ranging from 4.10 to 3.87.
- **RECOMMENDATION TO OTHERS** - More than nine out of ten of the respondents stated that they were likely to recommend the area to friends and relatives (95%). Nearly three-quarters of the visitors were 'very likely' of recommending the area for holiday trips (73%).
- **EXPENDITURE** - The overall average spend per person by holiday makers was £52.20.

3. Aims For The Next Three Years

3.1 Tourism Marketing

Strategic Objective:

To attract an *additional* 2% of visitors to East Lothian from the Edinburgh and Lothians catchment, principally from the UK leisure short breaks market, by devising tactical marketing campaigns based on East Lothian's inherent strengths in activity and environmental tourism.

Rationale:

The tourist industry in East Lothian has traditionally depended upon the UK main season holiday market which is now in slow and steady decline. The reduced length of stay of leisure visitors - and their propensity to take short holidays at any time of year - represents both an opportunity and a threat to East Lothian. It has therefore become necessary to devise a plan that presents East Lothian as a year-round destination for UK short break visitors, independent and group leisure day visitors and overseas independent tourers. In this respect it is important that we exploit the potential of East Lothian's proximity to Edinburgh and its growing city break business. City breaks represent the fastest growing sector of tourism - expected to grow by 20% in the next four years. Moreover, 25% of world outbound tourism trips in the next two years are expected to be for city breaks. Therefore, East Lothian's marketing communications, to be successful, must be associated to some extent with Edinburgh's status as the Gateway to Scotland. However, the potential for East Lothian to develop its own products and niches is recognised by the partners and reflected in the development of new visitor attractions and tourism products highlighting the natural attraction of the area. The need to manage these opportunities in a sustainable way is reflected by the industry's desire to adopt a slogan that can be shared by everyone in the industry and attract visitors who respond to the quality of our products and services.

Successful film and TV productions can have a spectacular effect on tourism. There have been many examples over recent years of the impact of film tourism on attractions, communities and countries. Crocodile Dundee (Australia), James Heriot's veterinary stories (Yorkshire Dales) and Monarch of the Glen (Speyside) have all had a direct impact on the economy of the areas in which they are set. There have been recent signs that East Lothian too may have opportunities to benefit from TV and film tourism. The new BBC production, Shoebox Zoo, which could become an international hit, is set in Edinburgh, but its opening credits feature Tantallon Castle and the Bass Rock. The Scottish Seabird Centre has, this year, played host to the BBC Wildlife Show and Lennoxlove Castle is to host an edition of the Antiques Road show. The challenge in the short term will be to capitalise on these opportunities and, in the longer term, to bring more TV and film crews to East Lothian.

Activities/Targets:

1. A 2004/05 Tourism Marketing Strategy for Edinburgh and Lothians will be devised, specifically incorporating activities which address East Lothian's priority market segments and seasonality objectives.
2. ELTB will engage and consult with the East Lothian Tourism Forum to develop the plan and communicate with the wider industry through

Lothianexchange.net and other channels, the market intelligence necessary to maintain knowledge of consumers and markets.

3. ELTB will develop proposals, with the East Lothian Tourism Forum and the industry in East Lothian, to encourage the trade to participate in short break campaigns with the potential to attract new business to East Lothian.
4. ELTB will develop an annual programme of at least three 'marketing opportunities' events in East Lothian to engage the industry more fully in marketing activities.
5. Working in partnership with the East Lothian Tourism Forum, ELTB will identify marketing projects with a potential for European Leader+ funding.
6. ELTB will engage the industry in East Lothian in marketing campaigns to improve collective visibility of the East Lothian brand. Specifically, we will discuss regularly with the East Lothian Tourism Forum the progress of marketing campaigns and strategies.
7. Through the offices of Edinburgh Film Focus, East Lothian Council and ELTB, the East Lothian Tourism Forum will consider the tourism potential of forthcoming productions and identify potential marketing and PR opportunities associated with them that would benefit sustainable tourism.

Lead Agency/Partners:

Edinburgh & Lothians Tourist Board in partnership with East Lothian Forum and East Lothian Attractions Group with support from East Lothian Council and Scottish Enterprise Edinburgh & Lothian and the private sector.

3.2 Golf Tourism

Strategic Objective:

To attract additional golf tourists to East Lothian, particularly at times of greatest spare capacity on local golf courses and in local accommodation providers.

Rationale:

East Lothian is an internationally recognised golf destination with 21 golf courses of all standards up to international championship level. Many of these courses are of a high quality – eg. Muirfield is a host of the Open Championship. The 2002 Open Championship in East Lothian was a great success and demonstrated the golf and tourism potential of East Lothian.

The area also has a rich golfing heritage and more links courses in close proximity than anywhere else in the world. At present, East Lothian attracts about 155,000 visiting golfers each year, but significant spare capacity exists on a number of courses in the area. There is significant potential to attract additional golfing visitors to East Lothian building on the 2002 Open Championship and the recent development of a New Strategy for Scottish Golf Tourism provides a platform from which East Lothian should actively seek to benefit. Membership of the East of Scotland Golf Tourism Alliance will give East Lothian's unique golfing heritage a higher profile regionally and internationally.

Achievements to date:

1. An East Lothian Golf Tourism Action Plan is being implemented, highlighting a number of priority projects to be implemented within a defined timescale.
2. An East Lothian Golf Development Officer was appointed for two years to progress the priority projects highlighted in the Golf Tourism Action Plan.
3. The East Lothian Golf Guide, Golf DVD and Golf CD ROM and related product, www.golfeastlothian.com, have been developed to promote East

East Lothian Tourism Action Plan 2004 - 2007

Lothian's golfing product to the widest possible audience for the greatest possible economic impact.

4. East Lothian joined the East of Scotland Golf Tourism Alliance in April 2003 and continues to work with national golf marketing agencies to optimise the coverage of East Lothian. Close working links have been established with national golf marketing agencies to enhance the profile of East Lothian within national Scottish golf tourism marketing campaigns.
5. Encouragement and support is given to the establishment of new golfing facilities and the upgrading of existing facilities in the area - eg. Whitekirk
6. The East Lothian Golf Project Group has been strengthened to forge closer working partnerships between golf courses and other sectors of the local tourism industry in order to facilitate the development of quality, customer led golf packages. Eg. International Pairs.

Activities/Targets:

1. To assist in the upgrading of visitor facilities and services, and to provide business development advice for at least 30% of golf courses in East Lothian. The number of upgraded visitor facilities in local golf courses will be monitored through uptake of appropriate business development and training courses and through planning applications.
2. To assist the establishment of easy-to-book packages linking at least eight local golf courses with at least 20 local accommodation providers by May 2004
3. To regularly update www.golfeastlothian.com with fresh content. The number of user sessions on the East Lothian Golf Website will be monitored on an on-going basis.
4. To establish a method of collecting figures on the number of visitors to golf courses in the area by June 2004. The number of additional golfing visitors will be monitored through sales of local golf packages.
5. The number of golfing packages established will be monitored through the East Lothian Golf Working Group comprising representatives of golf clubs and local accommodation providers.
6. Editorial coverage for East Lothian golf will be monitored and results circulated to all partners.
7. To continue to employ a part time golf officer to oversee golf projects subject to funding availability.

Lead Agency/Partners:

East Lothian Council with support from Scottish Enterprise Edinburgh & Lothian, Edinburgh & Lothians Tourist Board and East Lothian Golf Project Group and the private sector.

3.3 Visitor Retention & Dispersal

Strategic Objective:

To increase the number of through visitors who stop in East Lothian and divert off main artery routes.

Rationale:

The main A1 artery road and the main East Coast railway line run through East Lothian. There is significant anecdotal evidence that the majority of visitors pass through the area on these main routes without stopping or diverting onto other routes. The upgrading of the A1 between Haddington and Dunbar is likely to further shorten journey times and increase average traffic speed, possibly further reducing the number of visitors who stop in East Lothian and their stopping times.

It will be a priority to encourage longer visitor length of stay in East Lothian and more repeat visits and to stimulate visitor dispersal throughout all parts of the area, especially after the upgrading of the main A1 artery road. The development of new visitor information and visitor interpretation and signage facilities will play a major role in achieving this priority.

Activities/Targets:

1. A Business Plan for Edinburgh & Lothians Tourist Board will be drawn up incorporating proposals which address East Lothian visitor retention and dispersal priorities including the role of events in visitor retention and dispersal. Numbers of visitors using manned visitor information facilities and ELTB's website will be monitored on an ongoing basis.
2. Visitor numbers, length of stay and dispersal will be monitored through local visitor surveys, supported by regional figures from national studies.
3. Interpretation points following the East Lothian Car Touring Trails are in place. These together with the Council's Interpretation Strategy will be monitored on an on-going basis. A leaflet will be produced to accompany the car touring trails.
4. Representations will be made to the Scottish Executive for additional funding to be made available for new signage, promotional materials and visitor information facilities relating to the upgrading of the A1 artery route. New tourism signage schemes will be developed to maximise the diversion of through tourist traffic off the upgraded A1 artery route onto local roads including the A199. Additional Scottish Executive funding resulting from the A1 upgrading and progress on the creation of new facilities will be monitored on an ongoing basis.
5. Representations will be made to railway companies and other transport companies to improve the quality, frequency and promotion of rail and bus services within East Lothian including the development of at least two new joint ticketing packages with local attractions/facilities.

Lead Agencies/Partners:

Edinburgh & Lothians Tourist Board, East Lothian Council and Scottish Enterprise
Edinburgh & Lothian in partnership with private sector, railways companies and other transport operators

3.4 Business/Product Development

Strategic Objective:

To facilitate the development of a modern, dynamic and competitive base of tourism businesses in East Lothian. This will be achieved through the enhancement of knowledge, skills and product innovation, while also encouraging greater collaborative working across all aspects of the local tourism industry.

Rationale/Impact:

The tourism industry throughout Scotland has witnessed continual change over recent years. In order to compete successfully in this climate of change, businesses in East Lothian must be fully aware of market trends and be able to respond to them effectively. Increasingly discerning customers will demand the highest standards of product quality and service delivery and tourism growth in East Lothian will depend on the industry's ability to meet these demands and on meeting the challenges of the seasonal nature of tourism in the area. The partners subscribing to this Action Plan will lead a number of initiatives and ensure the availability of support programmes specifically to facilitate the highest level of business growth among tourism businesses.

Activities/Targets:

1. Further development of initiatives to improve the issues of staff recruitment and retention among tourism businesses in East Lothian. To develop and implement at least two initiatives with Springboard Scotland to specifically promote tourism and hospitality as a career choice to young people in East Lothian.
2. SE Edinburgh and Lothian will identify and work with Key Account tourism operators in East Lothian. This work will offer business development support to businesses/organisations that can have a significant impact upon the East Lothian economy. All partners will work in close association with the National Museums of Scotland to maximise the benefit to East Lothian of product developments at the Museum of Flight, specifically with regard to the Concorde exhibit which is likely to represent a significant product enhancement for East Lothian.
3. The Edinburgh and Lothian Tourism Industry Website (www.lothianexchange.net) will be further developed to ensure business development solutions, market intelligence and training opportunities are effectively promoted to the tourism industry in East Lothian. To develop a 'Business Exchange' facility on Lothianexchange.net (to facilitate communication and collaboration among like-minded businesses) and to ensure that at least 30 East Lothian Tourism businesses are registered on this facility by March 2005. To secure news contributions from at least ten East Lothian businesses.

East Lothian Tourism Action Plan 2004 - 2007

4. To assess the feasibility of developing East Lothian's water sport product with a view to participation in national marketing under VisitScotland's "Activities" portfolio.
5. To support tourism businesses in the adoption of e-business, helping individual businesses in the use of Information and Communication Technologies to both grow their business and to manage their existing business more effectively. To assist at least 25 businesses to undertake ICT training programmes offered by ELTB. To assist at least five East Lothian businesses to enhance their level of e-business adoption by March 2005. The overall impact of e-business adoption will be monitored by a specific survey.
6. Promotion of business development programmes to ensure that all East Lothian tourism businesses are given the opportunity of business development support. To encourage participation in the 'Fully Book Your Business' workshop by 10 East Lothian Businesses by December 2004. Encourage participation in the 'Masterstoke' Golf Business Development programme by six East Lothian golf clubs/courses by March 2005. To encourage the development of sustainable tourism in East Lothian by encouraging ten additional East Lothian Businesses to participate in the Green Tourism Scheme.
7. The stimulation of innovation in the East Lothian tourism industry, with a view to improving product quality and service. To encourage the participation of at least eight East Lothian Businesses in Innovation Workshops by December 2004. To encourage at least three applications from tourism businesses in East Lothian for the Tourism Innovation Development Awards promoted by Scottish Enterprise by March 2005.
7. Encouragement and facilitation of collaboration among tourism businesses in East Lothian wherever the potential for joint working and mutual benefit can be identified. To facilitate at least one event that will act as vehicle for collaboration among East Lothian Tourism businesses. To encourage the East Lothian Visitor Attraction Working Group to develop a minimum of four projects by March 2005.

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Lead Agencies/Partners:

Scottish Enterprise Edinburgh & Lothian, East Lothian Council and Edinburgh & Lothians Tourist Board in partnership with private sector.

Activity Plan

PRIORITY AREA	PROJECT	LEAD BODY	PARTNERS	STATUS	TARGET THIS YEAR
Tourism Marketing	2004/2005 Tourism Strategy for Edinburgh & Lothians	ELTB	LAs, forums, SEEL	Incorporated in 2004/2005 Business Plan approved by ELTB Board of Directors 18 June 2004	
	Communication of Market Intelligence	ELTB/SEEL	ELC	Business Exchange facility in development	
	Engage EL tourism businesses in growing markets (specifically short breaks) through good communication of marketing opportunities	ELTB	Tourism Forum, ELC	Three educational events held this year	3 events
	Identify marketing projects with ability to attract European funding	ELTB	Forums, Tyne and Esk Valley Leader Plus	Little scope in current year as Leader Plus funds committed	
	Regular discussion of campaigns, strategies and brand development	ELTB/	Tourism Forum, ELC	Taking place through forum meetings, East Lothian Attraction Group and at Innovation Seminars	

PRIORITY AREA	PROJECT	LEAD BODY	PARTNERS	STATUS	TARGET THIS YEAR
Golf	Assist upgrading of facilities and services, advise on business development	ELC	Golf courses and other relevant private sector bodies	Advisory visits made to 3 courses	7 courses
	Establish easy-to-book golf break packages	ELC	Golf courses and other relevant private sector bodies/ELTB	12 courses signed up for project	8 courses
	Regularly update content on golfeastlothian.com	ELC	Golf courses and other relevant private sector bodies/ELTB	On-going through the services of the Golf Development Officer	
	Establish method for collecting data on golf course visitors	ELTB	Golf Courses		
	Monitor column inches of EL golf editorial coverage	ELC	Golf Courses	System now in place	
	Continue to employ part time Golf Development Officer	ELC/SEEL/ELTB		Funding in place and appointment made until Jan 05	
Visitor Retention and Dispersal	Visitor numbers and habits tracked through surveys	SEEL	ELTB/ELC	East Lothian Visitor Survey now published	

East Lothian Tourism Action Plan 2004 - 2007

PRIORITY AREA	PROJECT	LEAD BODY	PARTNERS	STATUS	TARGET THIS YEAR
	Produce leaflet to accompany car touring trails	ELC		Leaflet now in circulation	
	Make representations to Scottish Executive for additional signage on A1 expressway	ELC	Tourism Forum, ELTB	Amended and additional signage schemes in progress	
	Make representations to transport operators to ensure quality of services and develop new joint-ticketing products	ELC	Tourism Forum, Visitor Attractions Group, ELTB	Representations currently being made on behalf of the industry in respect of the Scotrail and East Coast Main line rail franchises.	
Business/Product Development	Develop initiatives to improve recruitment and retention	SEEL	ELC, ELTB	Initiatives undertaken by Springboard Scotland (funded by SEEL)	
	Identify "Key Account" operators in EL tourism sector	SEEL	ELC, ELTB	Museum of Flight and Scottish Seabird Centre are currently "Key Accounts" and have a business manager assigned. This is kept under constant review.	

East Lothian Tourism Action Plan 2004 - 2007

PRIORITY AREA	PROJECT	LEAD BODY	PARTNERS	STATUS	TARGET THIS YEAR
	Promote business development programmes such as "Fully Book Your Business", "Masterstroke" and the Green Tourism Scheme	SEEL	ELC, ELTB	Programmes to be delivered throughout 2004/5.	10 FB 6 MS 10 BTS
	To assess the feasibility of developing East Lothian's water sport product	ELC	ELTB, VS, SEEL	Initial meetings with sector representatives	3
	Stimulate innovation in the EL Tourism Industry	SEEL	ELC, ELC	East Lothian Innovation Workshop delivered in July 2004.	3 TIDA applications
	Encourage collaboration, specifically through projects delivered through the EL Attractions Group	ELC	SEEL, ELTB,	As above – Innovation workshop aimed at stimulating collaborative initiatives.	