

East Lothian Tourism Action Plan 2016-18

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 in conjunction with both industry and relevant public agencies 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'*.

This plan also recognises the importance of events and the economic impact they bring to the local area as well as introducing new audiences to East Lothian. Opportunities to link to the National Event Scotland Strategy 'Scotland the Perfect Stage' whose vision 'To develop, through a one Scotland approach, a strong and dynamic events industry producing a portfolio of events and festivals that delivers sustainable impact and international profile for Scotland' will be explored, with opportunities to align the events process in East Lothian to that of Event Scotland assessment to allow for meaningful analysis of event impact to the county.

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>Strengths Golf Coastline Proximity to Edinburgh Accommodation mix Good quality food and drink Award winning tourist attractions Good coastal rail links Growing number of festivals and events Food and drink industry engagement Heritage resources Number of quality visitor attractions Environment and wildlife</p> | <p>Weaknesses Proximity to Edinburgh A1 – direct route through East Lothian to Edinburgh and south Lack of larger hotels suitable for group travel Public transport provision within East Lothian Inconsistent industry engagement Awareness amongst potential visitors</p> |
| <p>Opportunities A1 –quick road links to Newcastle and south, Edinburgh and Newcastle airports Emerging markets to Scotland New airline routes to Edinburgh Airport Wildlife tourism John Muir Way and John Muir as a brand Outdoor tourism – cycling, water sports, walking TV and film locations and filming Year of Innovation, Design and Technology future themed years Community Rail Partnership Forth ferry Crossing and Links to Fife Visitors Awareness of National Marine Centre in North Berwick due to open 2019/20 The Saltire and Winter Festivals</p> | <p>Threats Potential closure of accommodation Downturn in the local economy Exchange rate fluctuations Bad weather during summer months Sustainability of festivals and events Upturn in overseas travel Disease and terrorism deterring travellers. Reduction in number of visitors to golf clubs – members favoured Funding sources</p> |

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 |
| Direct Economic Impact | £ 13.44m | £ 4.34m | £ 25.63m |

Total Economic Impact

Using an output multiplier of 1.31 the total economic impact of The 2013 Open on East Lothian is estimated at **£17.60m¹**. For the City of Edinburgh the total impact is estimated to be **£6.76m²** 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 **£42.28m³**.

Scottish Open 2015

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

¹ 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.

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

³ 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.

3. **Visitor Types to East Lothian**

In 2015 a visitor survey was undertaken by LJ Research, as part of the research psychographic segmentation as well as traditional visitor profiling was undertaken. Using this type of questioning technique, allows data to be presented in a format which sculpts information gathered into marketable segments which can be presented as key target markets for East Lothian. Five key segments were identified.

Family time – Day Trippers

Active Explorers

Relaxers

Event Goers

Visiting Friends and Relatives

Active Explorers

Active Explorers are the segment that engages the most with East Lothian. Not only are they more likely to be staying visitors, they also enjoy the vast diversity the area has got to offer: from beaches and countryside scenery, to attractions and activities. Typically aged between 34 and 54 years, generally Scottish in origin there are a large proportion of this category that come from the rest of the UK and overseas. 35% of them have visited the county more than 20 times in 5 years making them loyal repeat visitors; however the rest of the segment has a high number of first time visitors providing an opportunity for growing this market and creating repeat visits.

Family Time – Day Trippers

Family Timers are families with children who predominantly live nearby East Lothian (e.g. Edinburgh, Midlothian, West Lothian or Borders) and who are likely to visit the area to entertain the kids by visiting museums and other attractions. 80% of this category are from Scotland of which 80% of them are from surrounding local authority areas to East Lothian. Regular visitors to East Lothian approximately 4-10 times in the last five years visitors within this segmentation enjoy the range of activities on offer for families including beaches, countryside and attractions. The remaining 20% of this group were holiday makers with above average spend on accommodation, all use the internet to research their stay making it imperative that accommodation providers and attractions information online is current and up to date.

Relaxers

This segment is comprised of mostly older day visitors who come to East Lothian to relax at its beaches. They are more likely than average to be from Scotland and more likely also to be from East Lothian's neighbouring communities – especially Edinburgh

Mainly older day visitors, 81% came from Scotland. 62% of this category stated they come to visit the beach and 63% stated they came to relax. This segmentation enjoy eating out and have the highest spend on food and drink compared to all other market segments. Use of local knowledge for recommendations is high as well as using tripadvisor for references 20% used the site compared to the overall average of 15%.

Event Goers

This category only visits if there is an event, for example the Air Show at the National Museum of Flight. This is the youngest segment and also the highest number of first time visitors – 20% has never visited before. 71% of visitors were from Scotland with 24% from the rest of the UK. Interesting they are more likely to come from a more rural location than Edinburgh where perhaps there are less events on offer, whereas in the city there is a vast variety of events throughout the year for locals to attend.

Visiting Friends and Relatives

This group comes to East Lothian to visit family and friends, the sights and attractions of East Lothian are secondary to their main reason for visiting. However this group does utilise local attractions and restaurants and cafes. Regular visitors to East Lothian, the majority of this group come from Scotland however a larger proportion come from elsewhere in the UK – 38%. The area has some appeal to those within this group as many enjoy sightseeing and walks, events also influenced timing of visits.

In addition to the specific East Lothian research, VisitScotland has recently updated their research showing 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 the local data gleaned from the visitor survey 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, below are the most relevant categories to East Lothian.

Adventure Seekers

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

Adventure Seekers are an ideal segment for East Lothian's growing water sports and outdoor activities market to target.

Engaged Sightseers

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

This category is also the most likely to go on coach tours, making them an ideal target market for the group leisure market.

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

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

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. This group therefore should be the easier 'sell' compared to the other segments.

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 Festivals and 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, Puffin Fest, North Berwick Highland Games, The Saltire and the Airshow. In addition to this there are number of newer events taking place across East Lothian which will undoubtedly attract additional visitors to the county, these include Total Warrior near North Berwick and the Ultra Marathon at Foxlake, in 2016 Musselburgh will also hold the Riding of the Marches, an event that takes place once every 21 years in July. There are also numerous other events both sporting and otherwise that attract both local and regional visitors as well as competitors who will visit the county. All of these events combined provide a comprehensive events calendar throughout the year.

Both the Brunton in Musselburgh and Musselburgh Racecourse also provide key events throughout the year, many of which draw visitors from further afield including Ladies Day and the Edinburgh Cup both in June and several themed race meetings aimed at families. The Brunton following a significant refurbishment in 2013, now attracts a varied and impressive calendar of performances from well know artists from across both the UK and abroad. A Fringe programme during the month of August and a Hogmanay festival ensures that the Brunton has a varied and interesting arts programme throughout the year.

In 2014 these festivals provided an economic impact of more than £2.1 million. 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 further develop events out with the main tourist season to help to address the imbalance of visitors during summer and winter. The Saltire Festival, held annually in November attracted 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. Following on from the Saltire the Brunton provides a varied winter programme including Hogmanay celebrations. Both events form part of Scotland's winter festivals programme. Opportunities to develop events around both the Saltire and Hogmanay are currently being explored in order to provide a more varied programme and attract additional visitors to the area however both funding and competing events namely Edinburgh Capital Christmas present a challenge when investing in a programme of activities.

Further development work with the festivals both 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. Opportunities for events to attract funding and annual themed year funding will be investigated as well as monitoring clear performance indicators that contribute both to overall economic impact and the lasting legacy of the event.

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. Early discussions between relevant public agencies and potential applicants should be made early on once the application process has been established.

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 100,000 visitors to the area annually returning an estimated economic impact of £20 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.

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, 72 private sector businesses 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 1/5th 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. Details of this strategy will feed directly into the East Lothian Tourism Action Plan and will form the basis for all digital campaigns undertaken.

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.

| | 2014 | 2015 |
|----------------------------|-------|-------|
| Production enquiries | 542 | 500 |
| Projects completed in 2014 | 361 | 345 |
| Conversion rate | 67% | 69% |
| Total filming days | 1076 | 942 |
| Average productions | | |
| Filming per day | 2.9 | 2.7 |
| Value to city region | £6.9m | £4.6m |

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 world's largest northern gannet colony, 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; events new to the county including the Big Nature Festival in Musselburgh and Puffin Fest in North Berwick 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, central belt and Northern England 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. Outdoor adventure enthusiasts will be able to participate in a number of adrenalin junkie events including Total Warrior at the Balgone estate and The Ultra Marathon at Foxlake, as well as the annual Edinburgh marathon that routes along the coast. Building on both the general rise in cycling in the UK and more specifically the legacy of the Tour of Britain which raised both the profile of the event within the county as well as showcasing the area as a great place to cycle, cycling continues to grow in East Lothian with a number of cycling clubs in the region using the county as its training ground most weekends, coupled with the quiet roads and excellent off road trails makes it perfect for families and novices wishing to get out on their bikes.. Cycling routes feature on the visiteastlothian.org website as well as a specific cycle route of the John Muir Way and are very popular, an opportunity to grow leisure cycling and potentially link to neighbouring Local Authority areas should be explored. Additional high profile cycle and outdoor events will be encouraged to come into the county and options to entice these events into the area will be explored.

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.

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

| Core action | Activity/ output | Partners |
|---------------------|---|---|
| Business Engagement | <ul style="list-style-type: none"> • Hold annual tourism conference for tourism businesses • Email business groups with industry relevant news • Themed industry liaison groups – golf, attractions, food and drink, festivals, venues – specific business tourism • Develop programme of networking and training opportunities for Tourism industry • Create industry specific pages within vel.org • Small grants programme for East Lothian industry | All East Lothian Businesses under the banner of Visit East Lothian, East Lothian Council, Visitscotland, Scottish Enterprise, Event Scotland. |
| Marketing | <ul style="list-style-type: none"> • Consumer e-newsletters – ELTAG mailing/ ELGTA mailing • Eat East Lothian – February fortnight restaurant offers • Attendance at relevant golf shows with ELGTA • Attendance at trade shows as Visiteastlothian • STV advertising of East Lothian • Leaflet distribution • Redevelopment of Visiteastlothian.org | ELTGA, ELTAG, East Lothian Council, Food and Drink |
| Project Development | <ul style="list-style-type: none"> • Grow Group Leisure market through Lothians Group leisure project • Film tourism engagement working with industry and Marketing Edinburgh in attracting filming to East Lothian | Industry partners, Visit West Lothian, Midlothian Council, East Lothian Council Marketing Edinburgh |

| | | |
|--|---|--|
| | <p>and subsequent marketing</p> <ul style="list-style-type: none"> • Develop new itineraries across East Lothian • Creation of digital marketing strategy and implementation plan. • Occupancy study for 2015/15 | |
| | <p>Collation of statistical information annually to inform tourism industry of overall financial performance. STEAM Up to date visitor information –Visitor Survey Occupancy study for all East Lothian accommodation types</p> | <p>East Lothian Council Visit East Lothian</p> |

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

| Core Activity | Activity/Output | Partners |
|----------------------|--|---|
| Business engagement | <p>Work with businesses across Seafood Trail/multi local authority regions</p> <p>Tourism and event support and capacity building</p> <p>Redevelop signature events programme and grants programme to reflect Year Of....</p> | <p>Partner local authority, food and drink businesses</p> <p>East Lothian Festivals Group</p> <p>Event Scotland</p> <p>East Lothian Council</p> <p>Event Scotland</p> <p>VisitScotland</p> |
| Marketing | <p>Develop Outdoor guide and Outdoor activity promotion at trade shows and new events (SCROPS/John Muir Event)</p> <p>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</p> <p>Forth Ferry – Joint marketing of the summer route</p> <p>Big Nature Festival – support and marketing of event</p> | <p>Foxlake Adventures</p> <p>East Lothian Council</p> <p>Outdoor Activity partners</p> <p>Food and drink businesses</p> <p>Scottish Seabird Centre</p> <p>East Lothian and Fife Councils</p> <p>Local businesses</p> <p>RSPB, East Lothian Council</p> <p>VisitScotland</p> |
| Project Development | <p>Develop opportunities linked to the John Muir Way, creating off shoots into East Lothian from the main route to encourage longer stays in the county.</p> <p>Cycle tourism – develop new routes with businesses, work cross border</p> | <p>John Muir Way steering Group, SNH</p> <p>East Lothian Council</p> <p>East Lothian Tourism Attractions Group</p> <p>Abellio</p> <p>Area Tourism Partnership</p> <p>Community Rail Partnership</p> <p>VisitScotland</p> |

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

| Core Activity | Activity/Output | Partners |
|---------------------|---|---|
| Business Engagement | East Lothian Tourism Attractions Group – Staff Pass | East Lothian Tourism Attractions Group |
| Marketing | Continued promotion of the brand Wish You Were There? Attendance at local events to showcase area to day visitors The Saltire festival – build on success of event to encourage off peak visitors to area | East Lothian Council Visit East Lothian East Lothian Tourism Attractions Group |
| Project Development | Review of interpretation across county ensure consistent message Develop links between rail and town centres – improvements at stations and signage Redevelopment of both visiteastlothian.org and golfeastlothian.com | East Lothian Council Area Partnerships Business Associations Community Rail partnership Abellio |

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

| Core Activity | Activity/Output | Partners |
|---------------------|---|---|
| Business Engagement | Scotland's taste of Best- increase business involvement VisitScotland accredited schemes | VisitScotland |
| Marketing | On arrival tourism – roll out of new I Know information points | VisitScotland East Lothian Council Tourist businesses |
| Project Development | Community Rail Partnership – create opportunities for developing route for tourist and leisure use outwith core times Area Tourism Partnership – Develop new projects across council area, through cycling, joint Lothian project and Expo . | Abellio Community Rail Partnership East Lothian Council Visit West Lothian Midlothian Council Marketing Edinburgh City of Edinburgh Council |