East Lothian Council

STEAM Tourism Economic Impacts 2024 Year in Review Summary

The Visitor Economy of East Lothian

This is a summary of the annual tourism economic impact research undertaken for East Lothian Council for the calendar years 2013-2024. Outputs in this report have been generated using the Scottish Tourism Economic Activity Model (STEAM), owned and operated by Global Tourism Solutions (UK) Ltd.

COVID-19 / STL Registration

Estimated tourism figures throughout Scotland appear to have returned to or surpassed pre-Covid estimates for the first time. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.

2024

1.6 million tourism visits to **East Lothian** in **2024**

.577 million visits were made by visitors **staying within the area** as part of a holiday or short break, generating **2.0 million nights** in local accommodation

3.0 million Visitor Days and Nights generated by Visitors in **2024**

On average, visitors **staying in the area** spend **3.5** nights in the area and spend a total of **£59 million** on local accommodation

.985 million tourism visits made by **Day Visitors**

Visitor activity and spend supports more than **4,626 full time equivalent jobs** locally

A total of **£379 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to East Lothian generated **£68 million** for the local economy in **2024**

In total, **staying visitors** generate a **total economic impact** of **£311 million** for local businesses and communities

Trends 2023-2024

Economic Impact +9.0%

Visitor Numbers +9.5%

Total Visitor Days and Nights +5.5%

2024

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Staying Visitors
37% of Visits

Day Visitors
63% of Visits

Total Visitor Numbers
1.56m

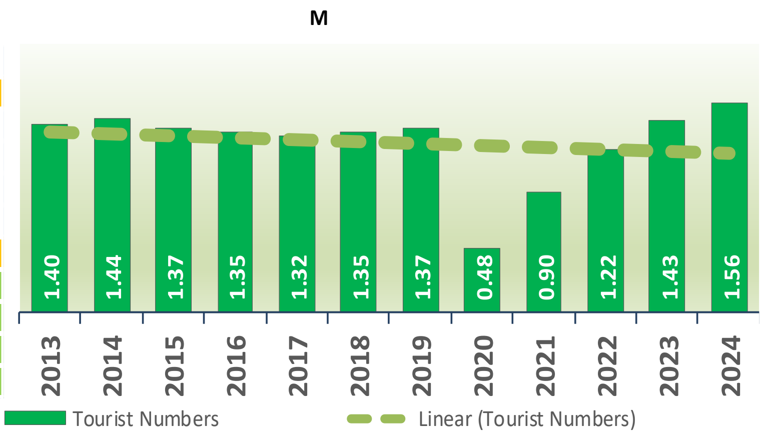
Visitor Numbers

There were an estimated 1.56m tourism visits to East Lothian in 2024, up by 9.5% from the previous year, and also up 14% from estimated pre-covid levels reported in 2019, mainly due to increases in the staying visitor accommodation sector.

In 2024, .577m visitors stayed in some sort of accommodation within the area. This sector saw an increase of 20.3% when compared to the previous year and is now 37% above pre-covid levels, which has had a positive knock-on effect on total numbers as a whole, as staying visitors also represent 37% of visitor numbers to the area. The serviced accommodation sector, primarily comprised of hotels, guest houses and B&Bs, saw a substantial increase of 31.8% over the last year and is now well above 2019 pre-covid levels. The much larger non-serviced accommodation sector was up 29.9% on the previous year and is also well above pre-covid estimates. Day visitors throughout many locations in the UK are just returning to pre-covid levels, especially in rural and semi-rural locations, so it is encouraging to see that day visitors were up by 4.1% on the previous year, they are now 3.9% above pre-covid estimates for the first time.

Visitor Numbers - Total

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



Key Figures: Visitor Numbers 2024

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**0.258**	**0.166**	**0.153**	**0.577**	**0.985**	**1.563**
2023 (Millions)	M	0.196	0.129	0.155	0.480	0.947	1.427
Change 23/24 (%)	**%**	**+31.8**	**+29.3**	**-1.7**	**+20.3**	**+4.1**	**+9.5**
Share of Total (%)	%	16.5	10.6	9.8	36.9	63.1	100.0

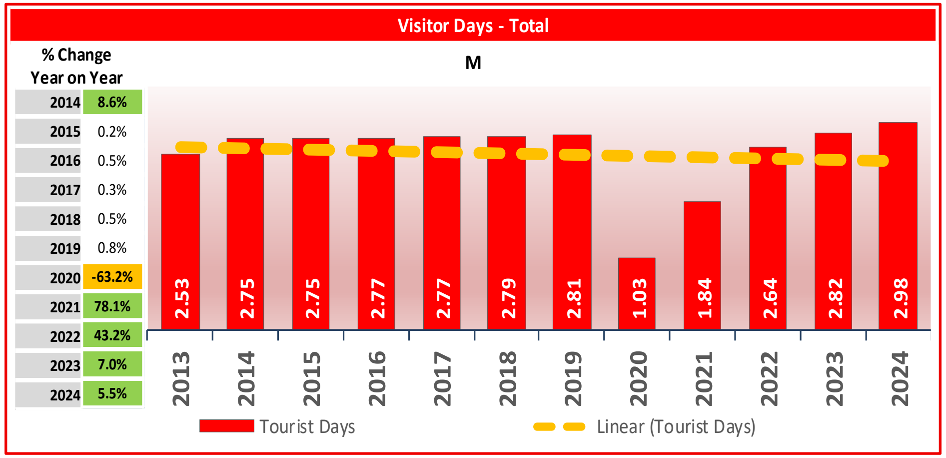
Total Visitor Days

2.98m

Visitor Days

Visitors spent an estimated 2.98m days in East Lothian during 2024. Visitor days take into account multiple stays. For example, if a family of five stay three nights, they will not only account for five visitors, but also fifteen visitor days. On average, staying visitors to the area stay 3.5 days, which is high compared with other areas.

Total staying visitors accounted for 1.99m visitor days in 2024, an increase of 6.2% on the previous year, and 6.9% above 2019 pre-covid levels. The serviced accommodation sector decreased by -15.3% when compared to 2023, which means that while more visitors stayed in serviced accommodation, they stayed for less time. In contrast, the larger non-serviced accommodation sector was up 19.7% on the previous year, and is above pre-covid 2019 levels, which points to the non-serviced sector recovering ahead of the serviced sector, in part due to an increase in establishments and bedspaces as a result of compulsory registration. As mentioned before, day visitors to the area are up by 4.1% on the previous year, a good result when compared to other areas, and especially as day visitors represent 63% of all visitors.



Key Figures: Visitor Days 2024

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (Millions)	**M**	**0.282**	**1.038**	**0.670**	**1.990**	**0.985**	**2.976**
2023 (Millions)	M	0.333	0.867	0.673	1.873	0.947	2.820
Change 23/24 (%)	**%**	**-15.3**	**+19.7**	**-0.5**	**+6.2**	**+4.1**	**+5.5**
Share of Total (%)	%	9.5	34.9	22.5	66.9	33.1	100.0

Average Length of Stay for Different Visitor Types: 2024

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.9	1.1	4.4	3.5	6.2

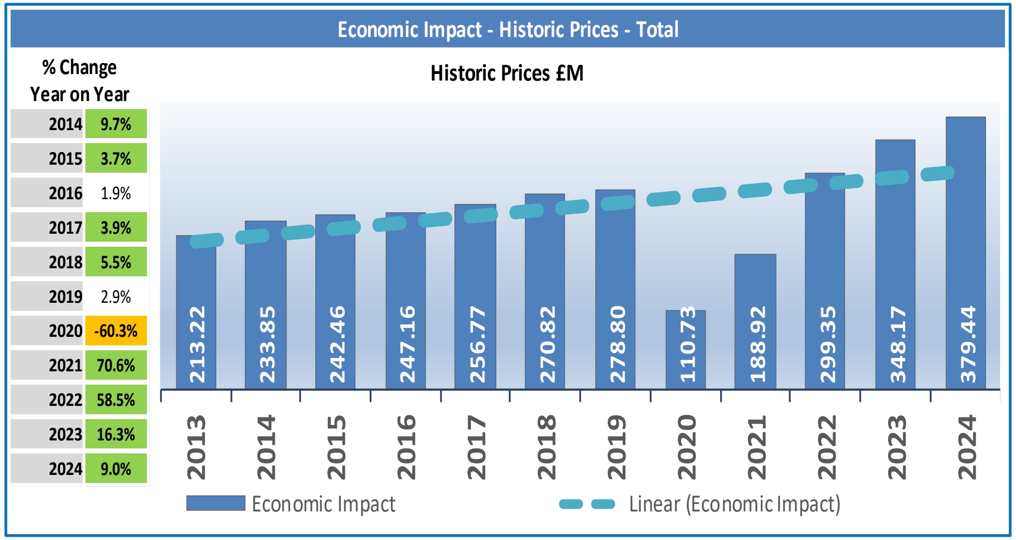
Total Economic Impact

£379m

Economic Impact

The value of tourism activity in East Lothian was estimated to be £379m in 2024, up by 9% on the previous year, and up by 1.9% (indexed for inflation) when compared to pre-covid levels.

The total *direct* economic impact comprises the expenditure of visitors on goods and services, totalling £282.7m. Further to this, indirect and induced economic effects of local businesses and residents spending tourism revenues locally, were estimated to account for a further £96.75m, together totalling £379m. The largest visitor spending sector was Transport (£80m), followed closely by Food & Drink (£77m), then Accommodation (£59m). The economic impact of the serviced sector was down by -7.3% on the previous year and is still below estimated 2019 pre-covid levels. In contrast, the larger non-serviced accommodation sector, comprising self-catering and some caravan, camping and touring sites, was up significantly by 29.9% on 2023 and as a result is above pre-covid estimates. In terms of comparison, the serviced sector has under a fifth of the bedspaces of the non-serviced sector and has around ¾ of the economic impact. Day visitor economic impact is up 8.9% on the previous year, and is now 2.7% above pre-covid levels when indexed for inflation.



Accommodation: Payments for overnight stays in accommodation, such as room rates, pitch fees and hire charges for non-serviced accommodation
Recreation: Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
Transport: Expenditure within the destination on travel, including fuel and public transport tickets
Food and Drink: Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries
Shopping: What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items
Indirect: The expenditure by local tourism businesses within the local supply chain

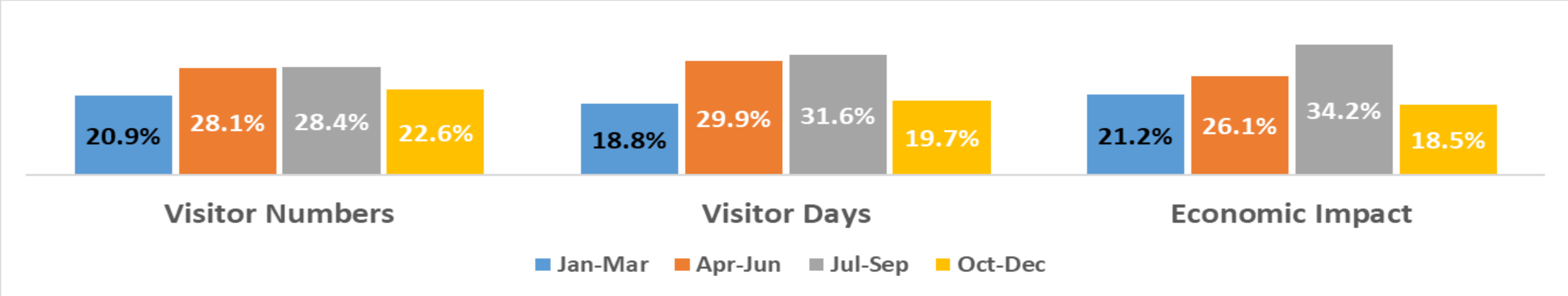
Key Figures: Economic Impact 2024

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2024 (£ Millions)	**£M**	**109.246**	**145.891**	**55.908**	**311.046**	**68.391**	**379.437**
2023 (£ Millions)	£M	117.814	112.270	55.298	285.383	62.784	348.166
Change 23/24 (%)	**%**	**-7.3**	**+29.9**	**+1.1**	**+9.0**	**+8.9**	**+9.0**
Share of Total (%)	%	28.8	38.4	14.7	82.0	18.0	100.0

Average Economic Impact Generated by Each Type of Visitor: 2024

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 387.33**	**£ 140.51**	**£ 83.43**	**£ 156.27**	**£ 69.40**	**£ 127.50**
Economic Impact per Visit	£ 423.37	£ 876.72	£ 366.21	£ 538.97	£ 69.40	£ 242.83

Seasonal Distribution of Key Visitor Metrics: 2024



Total FTEs Supported

4,626

Employment Supported by Tourism

The expenditure and activity of visitors to East Lothian supported a total of 4,626 Full-Time Equivalent jobs (FTEs) in 2024; an increase of 5.8% on the year before, and 4.3% above 2019 pre-covid levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 3,560 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,066 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 1,114 FTEs, followed by Food & Drink at 887 FTEs, then Transport at 801 FTEs, followed by Shopping at 399 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2024

Employment Supported by Sector 2024	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	1,114	887	358	399	801	3,560	1,066	4,626

STEAM Comparative Headlines: 2023 and 2024 (Unindexed)

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

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

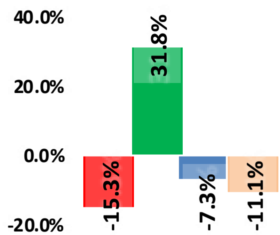
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %	2024	2023	+/- %
Visitor Days	M	0.282	0.333	-15.3%	1.038	0.867	19.7%	0.670	0.673	-0.5%	1.990	1.873	6.2%	0.985	0.947	4.1%	2.976	2.820	5.5%
Visitor Numbers	M	0.258	0.196	31.8%	0.166	0.129	29.3%	0.153	0.155	-1.7%	0.577	0.480	20.3%	0.985	0.947	4.1%	1.563	1.427	9.5%
Direct Expenditure	£M																282.69	261.21	8.2%
Economic Impact	£M	109.25	117.81	-7.3%	145.89	112.27	29.9%	55.91	55.30	1.1%	311.05	285.38	9.0%	68.39	62.78	8.9%	379.44	348.17	9.0%
Direct Employment	FTEs	1,092	1,228	-11.1%	1,440	1,116	29.1%	462	479	-3.7%	2,994	2,823	6.0%	566	545	3.8%	3,560	3,368	5.7%
Total Employment	FTEs																4,626	4,374	5.8%

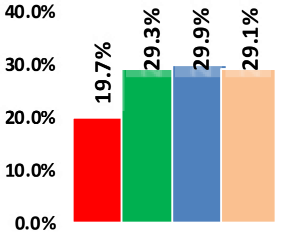
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2023 - IN HISTORIC PRICES

KEY
- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

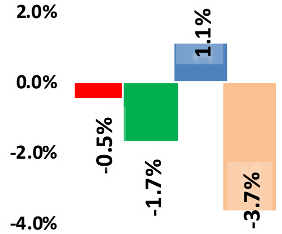
Serviced



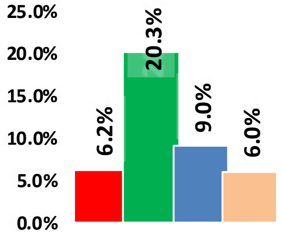
Non-Serviced



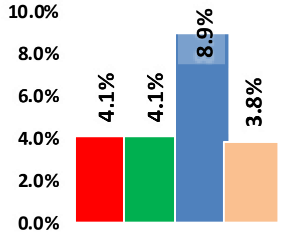
SFR



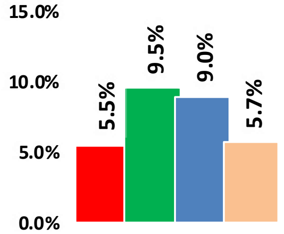
All Staying Visitors



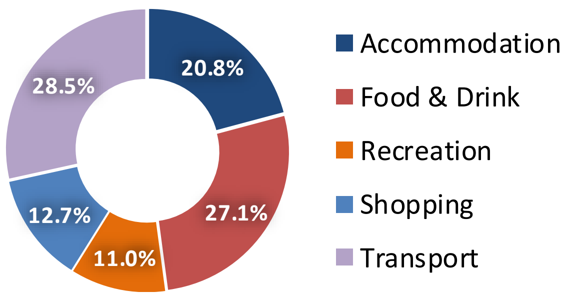
Day Visitors



All Visitor Types

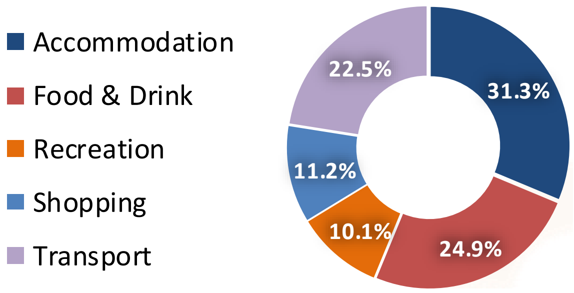


Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices / Sectoral Distribution of Employment - FTEs



Direct Expenditure Categories

Economic Impact 2024	Economic Impact 2023	+/- %	Sectors	Employment 2024	Employment 2023	+/- %
58.91	52.02	13.2%	Accommodation	1,114	969	14.9%
76.48	71.03	7.7%	Food & Drink	887	864	2.6%
31.08	30.31	2.5%	Recreation	358	366	-2.3%
35.77	32.65	9.6%	Shopping	399	382	4.4%
80.45	75.20	7.0%	Transport	801	786	2.0%
282.69	261.21	8.2%	TOTAL DIRECT	3,560	3,368	5.7%
96.75	86.96	11.3%	Indirect	1,066	1,005	6.1%
379.44	348.17	9.0%	TOTAL	4,626	4,374	5.8%



Direct Employment Categories

STEAM Comparative Headlines: 2019 and 2024 Covid Recovery (Indexed for inflation)

STEAM REPORT FOR 2013-2024 - FINAL EAST LOTHIAN COUNCIL	Comparing 2024 and 2019 2019 in 2024 prices (1.336)	COMPARATIVE HEADLINES

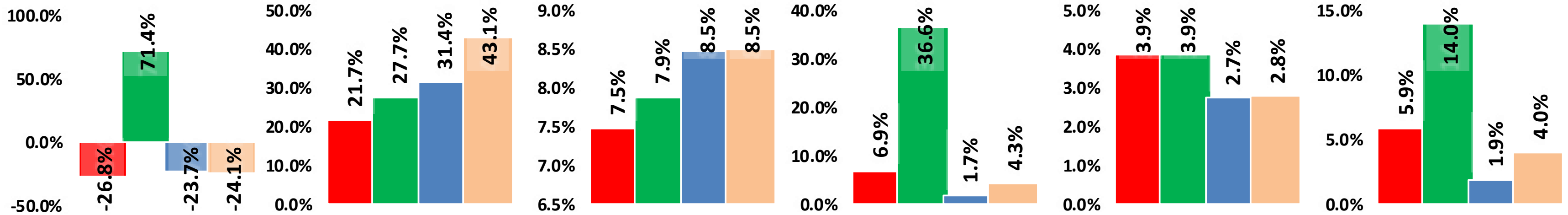
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2024 & 2019 - INDEXED TO 2024

KEY		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
An increase of 3% or more		Serviced			Non-Serviced														
Less than 3% change																			
A Fall of 3% or more		2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %	2024	2019	+/- %
Visitor Days	M	0.282	0.385	-26.8%	1.038	0.853	21.7%	0.670	0.623	7.5%	1.990	1.861	6.9%	0.985	0.949	3.9%	2.976	2.810	5.9%
Visitor Numbers	M	0.258	0.151	71.4%	0.166	0.130	27.7%	0.153	0.142	7.9%	0.577	0.422	36.6%	0.985	0.949	3.9%	1.563	1.371	14.0%
Direct Expenditure	£M																282.69	280.55	0.8%
Economic Impact	£M	109.25	143.25	-23.7%	145.89	111.03	31.4%	55.91	51.54	8.5%	311.05	305.81	1.7%	68.39	66.57	2.7%	379.44	372.38	1.9%
Direct Employment	FTEs	1,092	1,439	-24.1%	1,440	1,007	43.1%	462	426	8.5%	2,994	2,871	4.3%	566	551	2.8%	3,560	3,422	4.0%
Total Employment	FTEs																4,626	4,434	4.3%

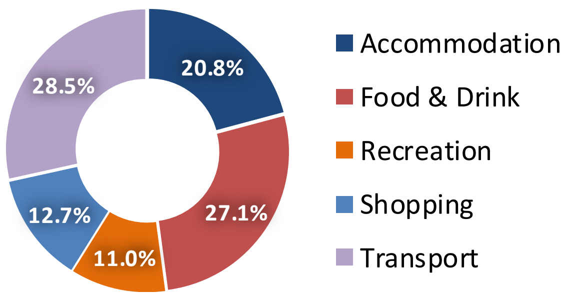
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2024 & 2019 - INDEXED TO 2024

KEY: Visitor Days; Visitor Numbers; Total Economic Impact; Direct Employment

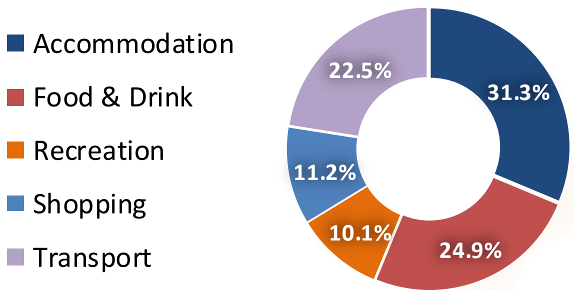
Serviced | Non-Serviced | SFR | All Staying Visitors | Day Visitors | All Visitor Types



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2024			Sectors	Sectoral Distribution of Employment - FTEs		
2024	2019	+/- %		2024	2019	+/- %
58.91	54.39	8.3%	Accommodation	1,114	951	17.1%
76.48	76.24	0.3%	Food & Drink	887	884	0.3%
31.08	33.19	-6.3%	Recreation	358	382	-6.3%
35.77	34.81	2.8%	Shopping	399	389	2.8%
80.45	81.93	-1.8%	Transport	801	816	-1.8%
282.69	280.55	0.8%	TOTAL DIRECT	3,560	3,422	4.0%
96.75	91.83	5.4%	Indirect	1,066	1,012	5.4%
379.44	372.38	1.9%	TOTAL	4,626	4,434	4.3%



Direct Expenditure Categories



Direct Employment Categories