East Lothian Council

STEAM Tourism Economic Impacts 2025 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 2014-2025. 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 have returned to or surpassed pre-Covid estimates. In some cases, compulsory Short Term Let registration has caused changes in accommodation provision numbers, which can in turn affect STEAM estimates.**

2025

1.6 million tourism visits to **East Lothian** in **2025**

.566 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

3.1 million Visitor Days and Nights generated by Visitors in **2025**

On average, visitors **staying in the area** spend **3.6** nights in the area and spend a total of **£70 million** on local accommodation

1.05 million tourism visits made by **Day Visitors**

Visitor activity and spend supports more than **4,758 fulltime equivalent jobs** locally

A total of **£412 million** was generated directly and indirectly within the local economy through visitor and tourism business expenditure

Day Visits to East Lothian generated **£76 million** for the local economy in **2025**

In total, **staying visitors** generate a **total economic impact** of **£336 million** for local businesses and communities

Trends 2024-2025

Economic Impact +8.6%

Visitor Numbers +3.6%

Total Visitor Days and Nights +3.0%

2025

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
35% of Visits

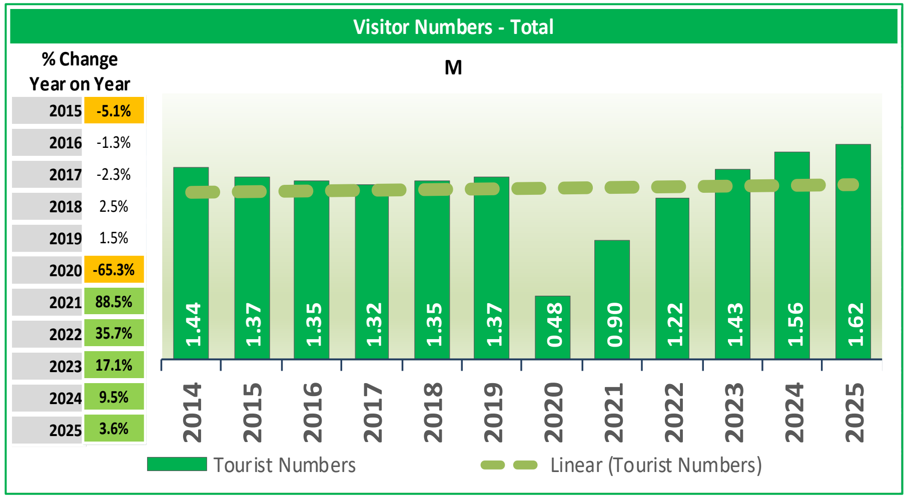
Day Visitors
65% of Visits

Total Visitor Numbers
1.6m

Visitor Numbers

There were an estimated 1.6m tourism visits to East Lothian in 2025, up by 3.6% from the previous year, and also up 22.8% from estimated levels reported in 2017, due to increases across all visitor sectors.

Between 2024 and 2025 visitor numbers rose in East Lothian, but not across the board. Visitor numbers were up in non-serviced accommodation (comprising self-catering options and some caravan, camping and touring sites) by 7.2% and within the Day Visitor sector by 6.9%. In contrast, visitor numbers within the serviced accommodation (primarily comprised of hotels, guest houses and B&Bs), dipped by -9.8% on the year before. This is a consistent pattern to various degrees seen throughout the United Kingdom and one we attribute to the current economic climate. The serviced sector is the larger accommodation sector in terms of numbers, with around a quarter more visitors annually than the non-serviced accommodation sector, but the latter has far more accommodation provision throughout the area. Day visitor numbers are on the increase year-on-year, and this is both encouraging and important as they represent 65% of all visitors to East Lothian.



Key Figures: Visitor Numbers 2025

Visitor Numbers		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.233**	**0.178**	**0.155**	**0.566**	**1.053**	**1.619**
2024 (Millions)	M	0.258	0.166	0.153	0.577	0.985	1.563
Change 24/25 (%)	**%**	**-9.8**	**+7.2**	**+1.2**	**-2.0**	**+6.9**	**+3.6**
Share of Total (%)	%	14.4	11.0	9.5	34.9	65.1	100.0

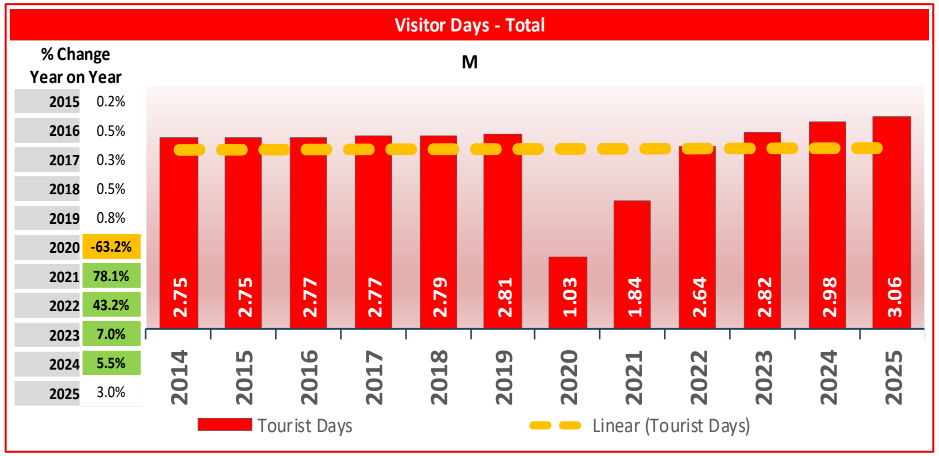
Total Visitor Days

3.1m

Visitor Days

Visitors spent an estimated 3.1m days in East Lothian during 2025. 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 3.6 days, which is high compared with other areas.

Total visitor days were up 3.0% from the year before. But as we saw with visitor numbers, there are differences within the overall picture. The non-serviced accommodation sector saw a slight increase 1.8%; combined with a rise in visitor numbers, this means more visits were made to non-serviced accommodation and visitors stayed marginally longer. As mentioned before, we have seen a small downturn in serviced accommodation numbers, and now also visitor days by -2.1%. This points to not only slightly fewer visitors, but also visitors spending slightly less time in serviced accommodation. Given the current economic uncertainties and constraints, this might be expected; it seems to be more apparent in more urban locations. Day visitor numbers and visitor days remain the same at 6.9% as they do not stay overnight.



Key Figures: Visitor Days 2025

Visitor Days		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (Millions)	**M**	**0.276**	**1.057**	**0.678**	**2.012**	**1.053**	**3.065**
2024 (Millions)	M	0.282	1.038	0.670	1.990	0.985	2.976
Change 24/25 (%)	**%**	**-2.1**	**+1.8**	**+1.2**	**+1.1**	**+6.9**	**+3.0**
Share of Total (%)	%	9.0	34.5	22.1	65.6	34.4	100.0

Average Length of Stay for Different Visitor Types: 2025

Day Visitors	All Visitors	Serviced Accommodation	Staying with Friends/Relatives	All Staying Visitors	Non-Serviced Accommodation
1.0	1.9	1.2	4.4	3.6	5.9

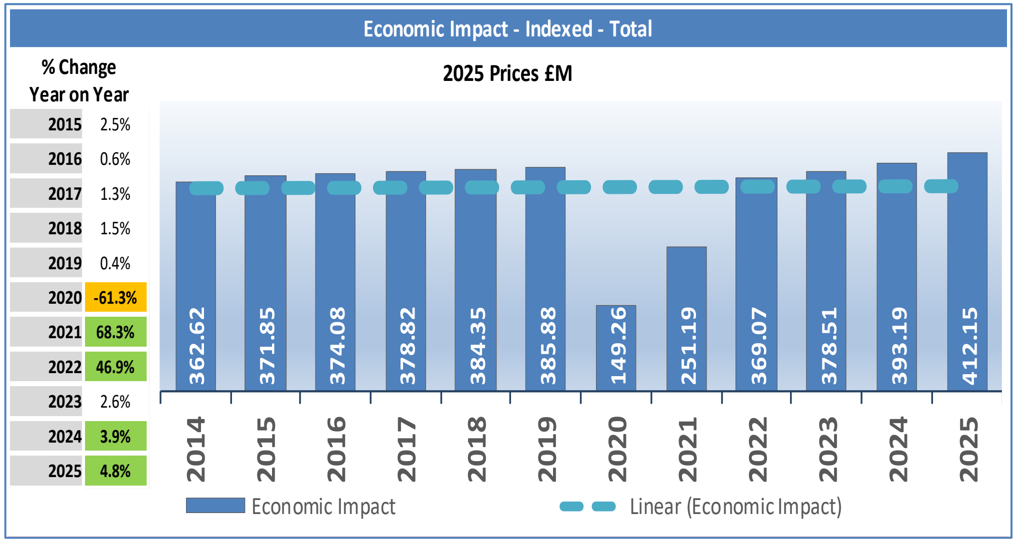
Total Economic Impact

£412m

Economic Impact

The value of tourism activity in East Lothian was estimated to be £412m in 2025, up by 8.6% on the previous year, and up by 13.7% (when indexed for inflation as illustrated in the bar chart below) when compared to 2014 levels.

Economic impact is comprised of two sections within the model. The first is the direct expenditure on good and services, in this case, £306 million. To this we conservatively add the indirect economic impact within the area of £106 million, to account for the supply chain- those supplying goods and services to support the visitor sector and its wider infrastructure. The most important sector is the non-serviced accommodation visitor sector, at £166 million, up by 13.9% on the previous year. This is followed by the serviced accommodation sector at £112 million and then the day visitor sector at £76 million. The model also estimates the sectoral distribution of the economic impact as follows: Transport £84m; followed very closely by Food & Drink at £81m; then Accommodation £70m; Shopping £38m; then Recreation at £33m. The serviced accommodation sector has 2/3rds the economic impact of the larger non-serviced accommodation sector; while All Staying Visitors have about four and a half times the economic impact of the day visitor sector.



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

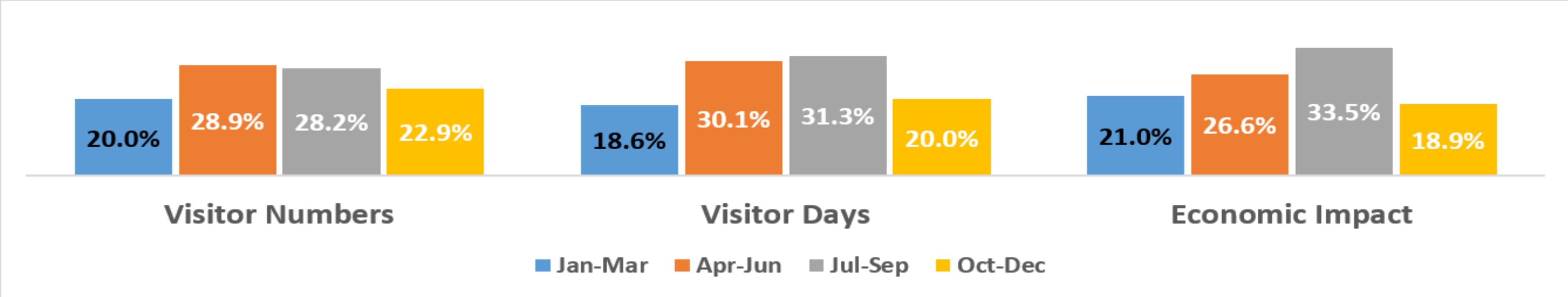
Key Figures: Economic Impact 2025 (Unindexed)

Economic Impact		Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
2025 (£ Millions)	**£M**	**111.649**	**166.137**	**58.606**	**336.392**	**75.758**	**412.151**
2024 (£ Millions)	£M	109.246	145.891	55.908	311.046	68.391	379.437
Change 24/25 (%)	**%**	**+2.2**	**+13.9**	**+4.8**	**+8.1**	**+10.8**	**+8.6**
Share of Total (%)	%	27.1	40.3	14.2	81.6	18.4	100.0

Average Economic Impact Generated by Each Type of Visitor: 2025

Economic Impact	Serviced	Non-Serviced	SFR	All Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	**£ 404.35**	**£ 157.16**	**£ 86.39**	**£ 167.22**	**£ 71.93**	**£ 134.48**
Economic Impact per Visit	£ 479.81	£ 931.03	£ 379.16	£ 594.64	£ 71.93	£ 254.59

Seasonal Distribution of Key Visitor Metrics: 2025



Total FTEs Supported

4,758

Employment Supported by Tourism

The expenditure and activity of visitors to East Lothian supported a total of 4,758 Full-Time Equivalent jobs (FTEs) in 2025; an increase of 2.9% on the year before, and 14% above 2014 levels.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 3,632 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 1,126 FTEs. The Accommodation sector is by far the largest employment sector supported by tourism activity, accounting for an estimated 1,142 FTEs, followed by Food & Drink at 905 FTEs, then Transport at 809 FTEs, followed by Shopping at 407 FTEs.

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type 2025

Employment Supported by Sector 2025	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	1,142	905	369	407	809	3,632	1,126	4,758

STEAM Comparative Headlines: 2024 and 2025 (Unindexed)

STEAM REPORT FOR 2014-2025 - FINAL EAST LOTHIAN COUNCIL	Comparing 2025 and 2024 All £'s Historic Prices	COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2024 - IN HISTORIC PRICES

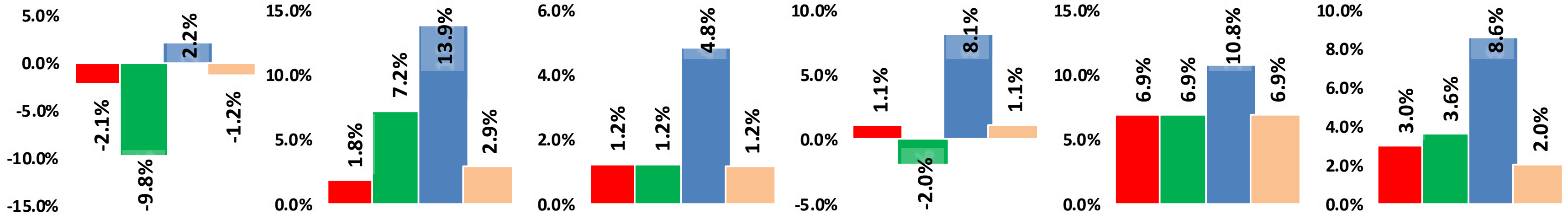
KEY
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %	2025	2024	+/- %
Visitor Days	M	0.276	0.282	-2.1%	1.057	1.038	1.8%	0.678	0.670	1.2%	2.012	1.990	1.1%	1.053	0.985	6.9%	3.065	2.976	3.0%
Visitor Numbers	M	0.233	0.258	-9.8%	0.178	0.166	7.2%	0.155	0.153	1.2%	0.566	0.577	-2.0%	1.053	0.985	6.9%	1.619	1.563	3.6%
Direct Expenditure	£M																306.28	282.69	8.3%
Economic Impact	£M	111.65	109.25	2.2%	166.14	145.89	13.9%	58.61	55.91	4.8%	336.39	311.05	8.1%	75.76	68.39	10.8%	412.15	379.44	8.6%
Direct Employment	FTEs	1,078	1,092	-1.2%	1,482	1,440	2.9%	467	462	1.2%	3,027	2,994	1.1%	605	566	6.9%	3,632	3,560	2.0%
Total Employment	FTEs																4,758	4,626	2.9%

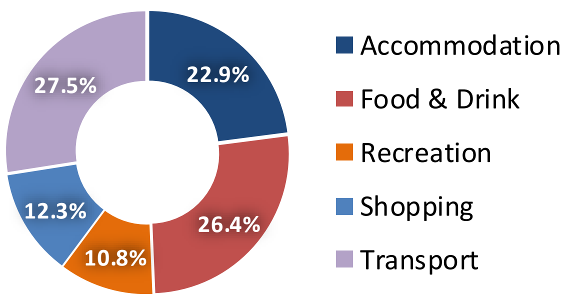
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2024 - IN HISTORIC PRICES

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

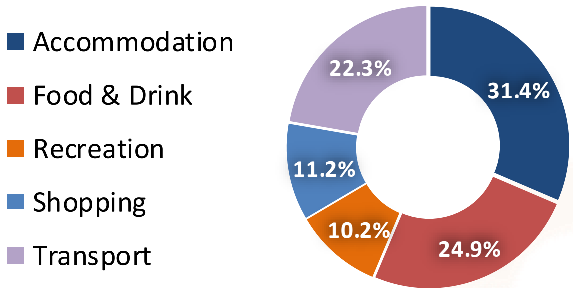
Serviced | Non-Serviced | SFR | All Staying Visitors | Day Visitors | All Visitor Types



Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices			Sectors	Sectoral Distribution of Employment - FTEs		
2025	2024	+/- %		2025	2024	+/- %
70.28	58.91	19.3%	Accommodation	1,142	1,114	2.5%
80.83	76.48	5.7%	Food & Drink	905	887	2.0%
33.20	31.08	6.8%	Recreation	369	358	3.1%
37.81	35.77	5.7%	Shopping	407	399	2.0%
84.17	80.45	4.6%	Transport	809	801	1.0%
306.28	282.69	8.3%	TOTAL DIRECT	3,632	3,560	2.0%
105.87	96.75	9.4%	Indirect	1,126	1,066	5.6%
412.15	379.44	8.6%	TOTAL	4,758	4,626	2.9%



Direct Expenditure Categories



Direct Employment Categories

STEAM Comparative Headlines: 2017 and 2025 (Indexed for inflation)

STEAM REPORT FOR 2014-2025 - FINAL	Comparing 2025 and 2017	COMPARATIVE HEADLINES
EAST LOTHIAN COUNCIL	2017 in 2025 prices (1.475)	

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2025 & 2017 - INDEXED TO 2025

KEY

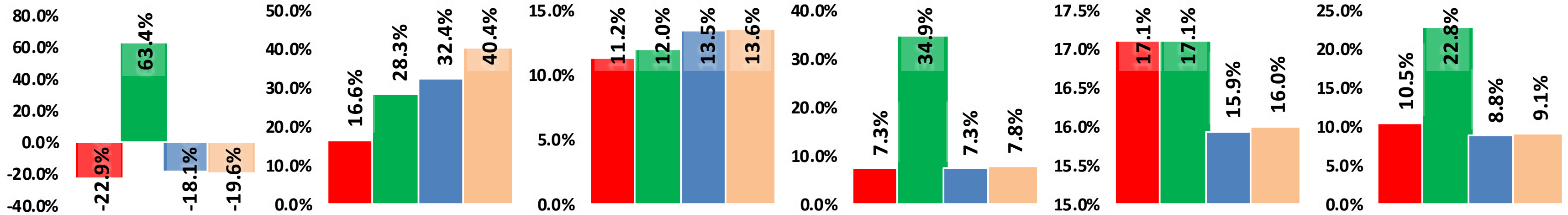
- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2025	2017	+/- %	2025	2017	+/- %	2025	2017	+/- %	2025	2017	+/- %	2025	2017	+/- %	2025	2017	+/- %
Visitor Days	M	0.276	0.358	-22.9%	1.057	0.907	16.6%	0.678	0.610	11.2%	2.012	1.874	7.3%	1.053	0.899	17.1%	3.065	2.774	10.5%
Visitor Numbers	M	0.233	0.142	63.4%	0.178	0.139	28.3%	0.155	0.138	12.0%	0.566	0.419	34.9%	1.053	0.899	17.1%	1.619	1.319	22.8%
Direct Expenditure	£M																306.28	284.26	7.7%
Economic Impact	£M	111.65	136.37	-18.1%	166.14	125.48	32.4%	58.61	51.63	13.5%	336.39	313.48	7.3%	75.76	65.34	15.9%	412.15	378.82	8.8%
Direct Employment	FTEs	1,078	1,341	-19.6%	1,482	1,055	40.4%	467	411	13.6%	3,027	2,807	7.8%	605	521	16.0%	3,632	3,329	9.1%
Total Employment	FTEs																4,758	4,334	9.8%

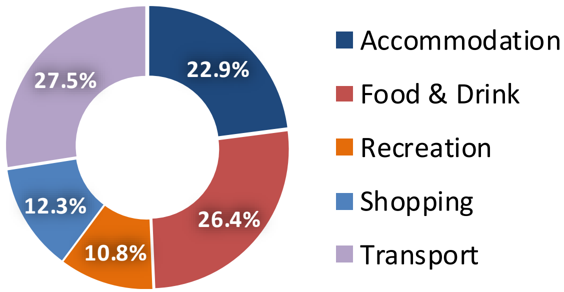
PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2025 & 2017 - INDEXED TO 2025

KEY

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



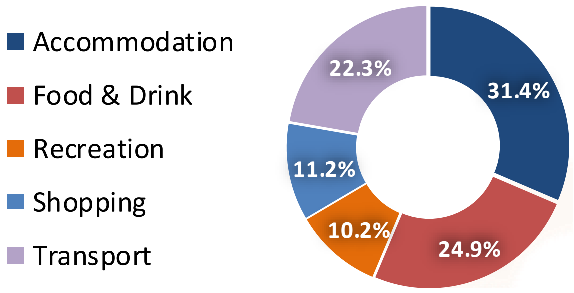
Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2025



Direct Expenditure Categories

Sectoral Distribution of Employment - FTEs

Economic Impact 2025	Economic Impact 2017	+/- %	Sectors	Employment 2025	Employment 2017	+/- %
70.28	57.57	22.1%	Accommodation	1,142	937	21.9%
80.83	77.08	4.9%	Food & Drink	905	863	4.9%
33.20	33.44	-0.7%	Recreation	369	372	-0.7%
37.81	35.57	6.3%	Shopping	407	383	6.3%
84.17	80.59	4.4%	Transport	809	774	4.5%
306.28	284.26	7.7%	TOTAL DIRECT	3,632	3,329	9.1%
105.87	94.56	12.0%	Indirect	1,126	1,005	12.0%
412.15	378.82	8.8%	TOTAL	4,758	4,334	9.8%



Direct Employment Categories