THE BATTLE OF PRESTONPANS LIVING HISTORY CENTRE

REASSESSMENT OF VISITOR NUMBER AND FINANCIAL PROJECTIONS

Prepared for The Battle of Prestonpans 1745 Heritage Trust
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1. INTRODUCTION

1.1 THE BATTLE SITE

The 1745 Battle of Prestonpans was the greatest victory of Bonnie Prince Charlie's Jacobite Army. The defeat of the Hanoverian army in just fifteen minutes provided the Jacobites with the momentum to continue their campaign south into England. Whilst the site of the battlefield is known, there is little to signal its existence to the visitor; development proposals for the surrounding area mean that it is regarded by Historic Scotland as one of the most severely threatened battlefields in Scotland.

1.2 THE PRESTONGRANGE INDUSTRIAL HERITAGE MUSEUM

The Prestongrange Industrial Heritage Museum stands on the site of a former colliery and explains the story of local industries and the people who worked in them. The Museum is owned and run by the East Lothian Council, and in 2009, it attracted 8,246 visitors. Prestongrange hosts an exhibition in the visitor centre which explains the different industries once on site, there is also a yearly temporary exhibition as well as other shorter temporary exhibitions. A free audio tour of the site is provided or can be downloaded prior to arriving. There is a cafe which serves drinks and snacks as well as a toy and book shop.

1.3 THE BATTLE OF PRESTONPANS (1745) HERITAGE TRUST

In 2006, the people of Prestonpans, the Prestonpans Community Council and the Prestoungrange Arts Festival joined forces to form the Battle of Prestonpans (1745) Heritage Trust. The Trust aims to develop a visitor attraction that offers a permanent and appropriate memorial that will better preserve and interpret this historic victory. Priority actions for the Trust include:

- The development of a Living History Centre proposed to be at the Prestongrange Museum. This would allow for the area's battle heritage to be interpreted alongside the other significant parts of Prestonpans' heritage.

- The touring of the Battle of Prestonpans Tapestry, as well as securing its permanent 'home'. A tapestry which details the story of Bonnie Prince Charlie has been created with over 200 volunteers taking part to create the world's longest tapestry. This is touring Scotland during 2010. Afterwards, it is the intention of the Trust to have a permanent centre in which to display the Tapestry at the Prestongrange Museum.

- Working with the owners of Seton Farm East, the Trust hope to develop a satellite interpretation centre at this location, which has been proven through archaeological research by Glasgow University to be the main area of engagement during the Battle.

- To continue the animation and interpreting of the Battle through maintaining the arts and re-enactment programme, living history days and extensive use of the BattleBus.

- To continue with the school learning programme.

- To create a 'sense of place' for future residents of the new eco-community at Blindwells through activities such as the re-enactments of the 4 a.m. Defile Walk and extensive interpretation through sculpture, library/exhibition facilities and street names in partnership with the developers.

- To continue to pursue the issues tabled and agreed with the Petitions Committee of East Lothian Council, such as presentation of monuments.

- To ensure that the artefacts from the Bankton House Doocot are appropriately displayed.

1.4 THE BATTLE OF PRESTONPANS LIVING HISTORY CENTRE

The Trust would like to develop a battlefield centre, or 'Living History Centre', at the current Prestongrange Museum. Although the Museum is located away from the battlefield site, it is felt that locating the centre there will allow for all the other significant parts of Prestonpans' history to be interpreted also. At present, the current Bath House is used to store the Museum's extensive railway collection, but is not well suited to this role. It is this building that the Trust wishes to develop to include facilities such as interpretations of the battle, library and study facilities, related small-scale theatres and art spaces, and improved visitor facilities. The water tower can also be renovated to include a rooftop café. It is also intended that the Tapestry would be housed in a proposed Tapestry pavilion attached to the existing building. The aims of the proposal are:

- To provide a permanent and accessible resource centre for the interpretation of the Battle of Prestonpans, fitting for its important standing in Scottish history, with relevance for schools, the local community and UK and overseas visitors.

- To honour those who fought and died on both sides of the Battle, evaluating the subsequent treatment of key players.

- To safeguard the Battle site by ensuring it is protected from encroaching development, delineating the lines of battle and facilitating proper archaeological exploration and preservation of all artefacts and remains.

- Become a self-financing tourist destination that will greatly benefit the local and national economy, using its location near the A1, just ten miles east of Edinburgh, to attract visitors.

- Developing a permanent home in which to display the Battle Tapestry.

Whilst the aims outlined above broadly relate to the Battle, there are also significant opportunities to present and interpret other aspects of the Prestonpans Community. These might include:

- The social and economic history of Prestonpans, including the rise and decline of its traditional industrial base.

- The Prestonpans Murals.

- The area's association with witches.

The project team anticipate making applications to the Heritage Lottery Fund and other bodies to raise the required capital. £50,000 has already been sourced from the Heritage Lottery Fund to do archaeology and battlefield markers.

It is a core aim of the project that it is financially sustainable. Whilst indicative architectural plans have been developed there has, to date, been no assessment of the market opportunity for this kind of facility at the Museum site.

1.5 PURPOSE

A study was previously undertaken by RGA for the Trust in 2007 to refine and assess the business opportunities suggested and to provide an expert, objective assessment of the viability of a visitor attraction based on the visitor centre located at the battlefield site. The purpose of this report is to reassess the 2007 study based on the location change to the Prestongrange Heritage Museum. The findings inform the development of likely visitor numbers to the site, and thereby determine the extent to which it might be financially sustainable.

1.6 SCOPE

The project has been based on the business concepts and ideas discussed with the client group.

The report assesses the feasibility of the project on a purely financial (revenue) basis, as stated in the consultancy brief. It is recognised by RGA that the project is capable of generating economic, community, social and educational benefits for Prestonpans and the wider area. However the quantification of these benefits falls outside the remit of this report.

The budget for this study has not included original market research or community consultation. The findings and recommendations are therefore based on a programme of secondary research, our extensive experience in the tourism and visitor attractions sector and other market research. The performance estimates provided in this report should be regarded as indicative only.

In researching the overall product mix at the proposed visitor centre, RGA has assumed that there is a desire, on behalf of the project team, to avoid displacing visitors, economic or business activity from other operators in the area.

This report summarises our research and findings.

1.7 APPROACH

In preparing this research study, RGA has undertaken the following:

- Visited the project site and met with the project team to obtain further information about the proposals;

- Reviewed the strategic and operating context for the project;

- Scoped the market in terms of current and future supply, market trends, and anticipated demand;

- Developed a Strategic Direction to define the purpose, standards, identity and objectives of the Prestonpans Visitor Centre;

- Prepared indicative visitor estimates for the facility and commented on the overall viability of the proposed product at the Prestongrange Museum, making recommendations as to how the project team might respond;

- Prepared financial projections and assumptions for the first five years of operation;

- Suggested an Action Plan for the project to set out the future work required to undertake the business planning and, ultimately, its delivery.

2. FINDINGS AND CONCLUSIONS

2.1 THE OPPORTUNITY

The Battle of Prestonpans (1745) Heritage Trust wishes to consider the development of a visitor attraction that offers a permanent and appropriate memorial that will better preserve and interpret the Battle.

Prestonpans has a high proportion of vulnerable social groups. This project has the potential to provide a positive social and economic influence on the area. The market area for the project also has a high proportion of affluent individuals who have the ability to make a positive contribution to the sustainability of the project.

Our research found no inherent barriers to developing a new visitor centre in East Lothian. The proposed visitor centre must be designed to be dynamic in a flexible, multi-functional facility that will maximise revenue generation. Partnerships, joint marketing and cross ticketing should be adopted for maximum visitor reach.

In terms of the economic, community and sustainability objectives which have been established for the project; multiple elements have the potential to generate positive benefits and financial sustainability.

The core visitor attraction would provide seventeen jobs and bring over 87,000 visitors from outside East Lothian.

2.2 VISITOR NUMBERS AND FINANCIAL PROJECTIONS

We believe that the core paid attraction, the Battlefield Centre, can achieve:

	2013	**2014**	**2015**
Total Attendance	98,139	87,353	89,422
Earned surplus from operations	£91,593	£41,347	£53,761

In addition, we have predicted 20,000 incremental visitors based on the redevelopment of Prestongrange as a Visitor Destination (Heritage Museum, coal, brick and glass industries).

As a result of developing an inclusive visitor experience at the site, we predict that visitor numbers may be 110,000 annually.

2.3 PROJECT MOMENTUM

There is potential for an attraction as the core of certain other elements that will satisfy the objectives of the Trust for this to be a regeneration project for the town. However these results are dependent upon the full development of the preferred site, Prestongrange Heritage Museum, by East Lothian Council or otherwise.

Meanwhile the Trust should maintain the momentum it has gained over the last decade and that the small scale interpretation of the Battlefield and a programme of suitable events should continue. They will further prove the potential of the destination and surprise the visitors.

The theme that has been adopted is “Victory, Hope and Ambition” for the community of Prestonpans.

3. OVERVIEW OF MARKET BACKGROUND

3.1 INTRODUCTION

Prestonpans is located on the south coast of the Firth of Forth, approximately ten miles east of Edinburgh, near the A1 corridor linking the North East of England with Scotland. It has a population of 7,153. Historically a mining town, there is currently very little industry, resulting in a stagnant economy for the last forty years. As a result of the economic difficulties since the last study, unemployment in the Ward of Prestonpans West has grown from 3.9 to 9.6% and is by far the highest in East Lothian.

RGA has examined the characteristics of the communities by commissioning an Acorn profile of the market area, at drive times of 30, 60 and 90-minutes from the project site. The isochrones were selected based upon the “normal” catchments for various scales of UK visitor attractions, based upon our experience of the sector. A map of the Acorn drive times can be found in Appendix B. Economic and tourism indicators have been provided for Prestonpans and East Lothian where appropriate.

A fuller analysis of the market background in presented in Appendix A and a summary can be found below.

3.2 CURRENT ECONOMIC CONDITIONS

Prestonpans is in a good location from which to access a significant proportion of the Scottish population within a 90-minutes drive.

The 30, 60 and 90-minutes areas are all characterised by high percentages of the population falling into the “Hard Pressed” Category when compared with the UK averages. These people are experiencing the most difficult social and economic conditions and appear to have limited opportunity to improve their circumstances.

The social and community objectives of this project, when fully developed, will therefore have the potential to impact on the most vulnerable social groups. This is one of the key aims for the project and also attractive to wider stakeholders. The potential impact of the project in these terms is, in our view, highly significant.

By contrast, there is also a high proportion of “Urban Prosperity”; these are well educated and mostly prosperous people. The high proportion of such individuals within the market area is positive in that they have a high propensity to undertake leisure activities and therefore can make a contribution to the financial sustainability of the project.

Approximately 77% of residents within the local authority of East Lothian are in employment, which is 3% above the national average. However, as mentioned, unemployment in the ward of is 9.6%. The service sector remains the largest employment sector (78%), followed by production and construction (18%) and agriculture, forestry and fishing (4%).

East Lothian is projected to see a higher than Scottish average increase in the population above working age, and those of working age. The population below working age is projected to decline but at a rate slower than the national level. There are concerns that the present trends of rapid population growth among working age adults are not sustainable with current employment levels.

High levels of commuting out of East Lothian for employment is also a concern as the low daytime population reduces the vibrancy of town centres and contributes to high levels of retail and service expenditure leakage.

The market area has good rail and road transport and communication links with access to Edinburgh and Glasgow Airports within a 60 minutes drive. Prestonpans is also served by train on the nearby Edinburgh to North Berwick line.

3.3 TOURISM OVERVIEW

In 2009, it was estimated that UK residents took 2.46 million tourist trips to Edinburgh and Lothians, spending approximately £562 million in the area. Overseas visitors took 1.33 million tourist trips to the region, spending £458 million. It is important to note that the inclusion of tourism statistics from Edinburgh will skew data, as Edinburgh is an internationally popular destination. 6.3% of the population of East Lothian are employed in tourism which is below the national average of 8.6%.

“Holidays” are the most popular reason for visiting, followed by business/conferences for domestic visitors and visiting friends and relatives for overseas tourists. Overall, the area shows less seasonality than Scotland as a whole and higher than average occupancy figures for all forms of accommodation, except caravan/camping sites and self-catering.

There are a large number of tourist attractions within Edinburgh and the Lothians, but the top ten are all in Edinburgh. East Lothian also has a number of tourist attractions, the two most popular paid ones being the Scottish Seabird Centre in North Berwick and the Museum of Flight in East Fortune. The former is in the top ten paid visitor attractions for the whole of Scotland.

East Lothian Council developed a tourism strategy for 2007-2010. Discussions with the Council revealed that an updated strategy is due for publication by the end of September. The Council is also in the process of producing a coastal tourism strategy for the region. There have been two recent tourism developments in the area. The first has been an extension to the East Links Family Park in Dunbar, the second is the building of a new hangar at the Museum of Flight.

As well as Prestongrange, the Council runs two other museums – John Muir’s Birthplace and Dunbar Town House (which is currently undergoing refurbishments). There are also three more museums that the Council are currently developing or redeveloping. The John Gray Centre in Haddington is currently under construction and is due to open in 2012. The Musselburgh Museum is also under development and will be open in early 2011. The North Berwick Museum is due to be renovated and reopened within the next few years, although there is no set date in place.

There are plans by the Council to redevelop Prestongrange, however, there is no funded commitment to this yet. The opening of three museums in the following two years may impact on the potential of the Council to fund Prestongrange. Furthermore, the opening of the three museums may also reduce the amount of visitors to Prestongrange, especially if it is not developed to be competitive.

3.4 REGENERATION

Conversations with East Lothian Council indicate that housing developments planned across a number of key sites in East Lothian, which stalled due to the impacts of the recession, are due to restart in the near future. Three of the largest occur close to Prestonpans. These are developments at Pinkie Mains, Blindwells (which includes the development of 1,600 homes) and at Lothian Mains. The need for new homes in the area is based on the Scottish Government's prediction of the East Lothian population growing by 32% by 2033. There are no anticipated large-scale commercial developments, although the Council indicated that there is business land available at the Queen Margaret University campus.

3.5 FINDINGS

- The immediate market in Prestonpans has a high proportion of vulnerable social groups, exacerbated by the rise in unemployment. This project has the potential to provide a positive social and economic influence on the area.

- The market area for the project also has a high proportion of affluent individuals who have the ability to make a positive contribution to the sustainability of the project.

- The rapid increase in the working age population of East Lothian may not be sustainable in the long term without an increase in jobs in order to curtail the high levels of commuting to Edinburgh for employment.

- Prestonpans is well located near the A1, the corridor linking the North East of England with Scotland and in a good position to capture a significant amount of the population within a 90 minutes drive.

- The tourism industry in the Edinburgh and Lothians region is worth approximately just over £1 billion per year in terms of visitor spend and plays an increasingly important role in the economic life of the region; 9.5% of all employment in the area is within the tourism sector, which is in line with Scottish national averages;

- The Scottish Seabird Centre is in the top ten of paid Scottish Visitors Attractions and is situated in East Lothian;

- There is evidence of some tourism development and rejuvenation in the area, in the case of the new museum developments and the building of a new hangar at the Museum of Flight.

- Although there are forward plans for the redevelopment of Prestongrange, there has not yet been a funded commitment from the Council regarding this. The opening of three new museums in East Lothian could reduce the visitor numbers to Prestongrange unless it is competitively re-developed.

3.6 CONCLUSIONS

A new visitor centre has the potential to benefit East Lothian in general and Prestonpans in particular as it would generate increased jobs and other community benefits thereby decreasing unemployment and displacement.

4. VISITOR ATTRACTIONS OVERVIEW

4.1 INTRODUCTION

In order to present an overview of the visitor attraction sector and its performance we have considered the latest published research for Scotland. This section will provide an overview of current trends by geographical area, visitor attraction type and other indicators such as entrance fees. This section finishes with other research gathered relevant to the project.

4.2 THE SCOTTISH VISITOR ATTRACTION MARKET

The VisitScotland Visitor Attractions Monitor provides a detailed account of the market year on year. Key findings from the 2009 report have been summarised.

During 2009 the Scottish visitor attraction sector experienced an overall increase in the number of visits by 3.5% on 2008. This is positive given the worldwide economic conditions. Table 3.1 details the overall performance of visitor attractions for 2009 compared to the previous year.

Table 4.2: Scottish Visitor Attraction Performance 2009

Admission	Sample	Visits 2008	Visits 2009	% Change 08/09
Free	301	29,014,208	29,838,917	2.8
Paid	381	14,227,494	14,910,434	4.8
Total	**682**	**43,241,702**	**44,749,351**	**3.5**

Source: VisitScotland Visitor Attraction Monitor 2009

The table illustrates that both paid and free attractions experienced increases in 2009. Free attractions at 2.8% and paid attractions at 4.8%.

Almost all areas in Scotland experienced an increase in visitor numbers in 2009. Greater Glasgow and Clyde Valley experienced the greatest increase in terms of numbers of actual visits recorded; Outer Hebrides experienced the greatest increase in visits in terms of percentage of visits recorded at 11.9%. Only Ayrshire and Arran experienced a decrease however this was only of -1%. Edinburgh and the Lothians experienced an increase of 1.9%.

By type, Scottish Places of Worship attractions experienced the greatest increase in percentage of visits at 10.2%, followed by Industrial/Craft Workplace category (9.2%). The category Museum/Art Gallery, to which Prestongrange belongs, experienced no growth in 2009. The Hertiage/Visitor Centre category, to which battlefield centres such as Culloden and Bannockburn belong, experienced an increase of 2.3%

4.3 MARKET AREA ATTRACTIONS

The competitor set for the proposed Prestonpans visitor centre was defined as all visitor attractions, historic properties, parks and estates and museums and galleries within the market area, divided into three catchments:

- 0-30-minutes;
- 30-60-minutes; and
- 60-90-minutes drive time of the project site.

(Note: this Section refers to direct competition in terms of other visitor attractions with a similar product: it should be remembered that the proposed visitor centre is also competing with a wider range of leisure activities such as going to the cinema, eating out and shopping. Each of these sectors is subject to its own market trends; in this Section we examine those related to the visitor attractions market having the view that they are the most relevant to the project overall).

RGA has identified a total of 285 attractions throughout the whole market area. As the Table below illustrates there is a relatively large competitor set within a thirty-minutes drive time. The attractions within the 90-minutes drive time are also considerable reflecting the location of the project site with relation to main urban centres including Edinburgh, Falkirk and the Eastern part of Glasgow. An overview of the primary competitor set is presented in Table 4.3.1.

Table 4.3.1: Overview of Attractions Supply by Drive-time

Drivetime	Number of Attractions	% of total Competitor Set
0-30 Minutes	84	29%
30-60 Minutes	50	18%
60-90 Minutes	151	53%
Total	**285**	**100%**

Source: VisitScotland /RGA

The combination of rural and urban characteristics within the catchment areas mean that there is a wide range of different types of attractions, as shown in Table 4.3.2.

Table 4.3.2: Supply of Visitor Attractions by Category

Category	Number of Attractions	% of Competitor Set
Museum/Gallery	74	26%
Castle/Historic Houses	56	20%
Parks and Gardens	53	19%
Visitor Centres	36	13%
Visitor Attraction	23	8%
Nature Attractions	12	4%
Religious Building	11	4%
Farm/Zoo	8	3%
Church	6	2%
General	6	2%
Total	**285**	**100%**

Source: VisitScotland /RGA

The largest category within the 90 minutes area is museums and galleries, accounting for over a quarter of all competitors. This is followed by castles and historic houses (20%) and parks and gardens (19%). Interestingly, visitor centres only constitute 13% of the supply set within the 90-minutes catchment and a closer look at the 30-minutes catchment identified only one visitor centre, the 'Clan Tartan Centre' in Edinburgh. These findings perhaps indicate that visitor centres are underrepresented within the immediate market area.

4.3.1 Average Attendance at Area Attractions

Table 4.3.3: Overview of Average Attendance Numbers, 2004-05

Drive Time	Total Attractions	Average Attendance 2008	Average Attendance 2009
0-30 Minutes	84	151,984	151,847
30-60 Minutes	50	36,955	39,927
60-90 Minutes	151	45,150	55,183
Total	**285**	**117,958**	**120,107**

Source: RGA Research

NB. Full attendance data was not available for all of the competitor attractions. A list of attractions included in this study is provided in Appendix K.

The average attendance numbers at market area attractions increased by 2% between 2008 and 2009. This is a positive indicator after the fall in visitor numbers that was experienced between 2007 and 2008 generally ascribed to the economic recession. The average visitor numbers in 2009 were highest in the 0-30-minutes drive time category (151,847), which perhaps reflects Edinburgh's position as the key tourist destination within a national context.

4.3.2 Pricing Structure of Competitor Attractions

Table 4.7 provides an overview of the pricing structure within the area's competitive supply.

Table 4.3.4: Overview of Pricing Structure of Competitive Supply

Drive Time	Paid (%)	Free (%)	Average Adult	Average Child
0-30 Minutes	44%	56%	£7.24	£4.35
30-60 Minutes	40%	60%	£5.73	£3.61
60-90 Minutes	32%	68%	£5.77	£3.62
Total	**37%**	**63%**	**£6.25**	**£3.86**

Source: RGA Research

NB. Full price data was not available for all of the competitor attractions. A list of attractions included in this study is provided in Appendix K.

The balance of paid and free attractions within the market area is a fairly similar split (40% paid and 60% free) across the three cohorts. Of the paid attractions, the average adult price is £6.25 – the highest cohort is the 0-30 minutes drive time (£7.24). The average admission for children is £3.86 across the three cohorts; similar to adult admission charges, the 0-30 minutes drive time presents the highest average prices (£4.35). Pricing a new visitor experience at Prestonpans should be set having regard to local market conditions with an appropriate pricing strategy implemented to address them. However, it should be noted that the higher pricing of visitor attractions in the 0-30 minutes drive time is a reflection of the popularity of these attractions, based in the centre of Edinburgh.

4.3.3 Seasonal Opening

Over one fifth (21%) of attractions in the whole market area operate on a seasonal basis; however for attractions in the 0-30-minutes area this figure reduces to 4%. This may reflect the fact that the Edinburgh and Lothians suffers from seasonality less than other Tourist Board areas.

4.4 OVERVIEW OF KEY VISITOR ATTRACTIONS AND OTHER RESEARCH

The following overview was conducted during the previous study, however, it has been updated where relevant to the reassessment.

4.4.1 Comparator Attractions

RGA reviewed National Trust properties at Culloden and Bannockburn (important battlefields) as well as the Museum of Flight and the Scottish Seabird Centre (the two largest visitor attractions in East Lothian). The research highlighted key points for sustainability and success as follows:

- a need to make attractions interactive to maximise visitor engagement;
- Links with other attractions and events are highly effective in increasing exposure; thereby benefiting from joint marketing and generating new and repeat visits;
- Development of multi functional spaces that can serve as education rooms as well as accommodate conferences and events maximise revenue generation.

4.4.2 Battlefield Tourism

Battlefield Tourism is included under the “Dark Tourism” banner which also includes Holocaust, cemetery, slavery-heritage and prison tourism.

According to the Dark Tourism Forum (a collaborative project led by the University of Central Lancashire), “Dark Tourism is the act of travel and visitation to sites, attractions and exhibitions which has real or recreated death, suffering or the seemingly macabre as a main theme.” The Dark Tourism Forum was established to increase debate and study into this increasingly popular genre of tourism.

Although this is still an emerging area of study, two elements appear to fascinate visitors when they try to understand the reality of battles. The first is an overview of the tactics of battle in which they need to see the movements of the armies as the battle proceeds. The second is the detail and reality of the conflict.

Visitors often have no concept of the nature of battle before the technological warfare of the modern era. The skills that were required of fighters are exotic in their unfamiliarity. Battles were fought in the daytime only because due to the lack of light, friends and enemies were often indistinguishable, battlefield communications were limited and armies composed of men with no training at one extreme and foreign mercenary fighters at the other.

There are a number of re-enactment societies that specialise in various eras. Re-enactments can range extensively in size, cost, and number of visitors it attracts. At the NTS and Historic Scotland, re-enactments are generally included in the admission charge but have the ability to attract thousands of visitors.

4.4.3 Battles of East Lothian

The Battle of Athelstaneford (832 AD), the Battle of Pinkie Cleugh (1547) and the Battle of Dunbar (1650) also occurred on East Lothian soil. The Battle of Pinkie, which took place along the River Esk in Musselburgh, is historically significant as it was the first modern battle fought in Britain. There is currently no on site commemoration or interpretation. There is a monument at The Battle of Dunbar. This resulted in the defeat of the Scottish army, and the English Parliamentary Forces were able to march into Edinburgh. The Battle of Athelstaneford which took place near Haddington between the picts and the Scots against the English is very modestly commemorated in the National Flag Centre.

However, in the majority of cases battlefields cannot be given statutory protection because they do not have any visible physical remains and there is often not enough documentary evidence to allow the site to be delineated accurately. Historic Scotland is working to improve their protection and published Ministers' policy for their protection last year.

4.4.4 Queen Margaret University

Informal discussions were conducted with the Queen Margaret University, who are situated at a new campus outside Musselburgh, into potential collaboration with the Centre. Several of the courses at the University require students to go on a two and a half week placement, and Hospitality students are expected to undertake a 16 week placement. However, they did note that as placements are often unpaid, it is difficult to convince many students holding part-time jobs to undertake them. Nevertheless, they did emphasise a change in thinking due to the recession, as more students are now seeing the benefits of gaining work experience. Furthermore, Events Management students would particularly be interested due to the difficulties of getting into the industry. There may also be potential for collaboration in terms of student projects, or academic research, concerning the Centre.

Overall, there are positive indications for potential collaboration with the University.

4.5 FINDINGS

- There is only one tartan themed visitor centre in the 30-minutes catchment, the 'Clan Tartan Centre' in Edinburgh, possibly indicating an under representation within the market area and a possible extension of this theme for the Centre;

- There are considerable fluctuations in the wider 60-90-minutes markets underlining the volatility of the visitor attractions market;

- Pricing a new visitor experience at Prestonpans should recognise sensitivity within the local market with an appropriate pricing strategy implemented to address this;

- Attractions in the 0-30-minutes market drive time operate on less of a seasonal basis than the wider market area reflecting a less peaked tourism pattern in Edinburgh and the Lothians than in other Tourist Board areas;

- Successful attractions are interactive and engaging to visitors. There is also benefit to linking with other organisations to reach a larger number of visitors.

- Motivation for Battlefield Tourism is still an emerging area of study; however it is clear that battle re-enactments have the potential to attract considerable visitor numbers;

- Broadening the theme of the centre and drawing on other East Lothian conflicts could widen the appeal to visitors;

- Queen Margaret University is keen to discuss various collaborative opportunities with the Centre;

4.6 CONCLUSIONS

Our research found no inherent barriers to developing a new visitor centre in East Lothian. The proposed Living History Centre should be designed to be dynamic in a flexible multi-functional facility that will maximise revenue generation.

Partnerships, joint marketing and cross ticketing should be adopted for maximum visitor reach.

5. *LEISURE VENUE CATERING*

5.1 INTRODUCTION

A catering offer at visitor attractions, museums and other leisure venues is now recognised as an important income generator and essential part of the customer experience. A brief analysis of the current catering supply within a 10-minutes drive and recognition of national trends has been conducted.

5.2 SUMMARY OF THE UK LEISURE VENUE CATERING MARKET

Mintel published their report, *Leisure Venue Catering UK* (March 2009), which addresses a market of particular importance to this Study. RGA have summarised the findings from this report.

5.2.1 Leisure Venue Catering Definitions

Mintel defines leisure venues as ‘licensed bingo clubs, cinemas, historic buildings, museums and art galleries, nightclubs and discotheques, tenpin bowling centres, theme parks, theatres and zoos and wildlife parks.’

Mintel defines leisure venue catering as ‘being any food- and drink-based (including alcoholic drinks) catering offer at specific leisure venues. Catering facilities might include kiosks, hatches, catering units, refreshment stands, bars, cafés and self-service or full-service restaurants.’

5.2.2 Overview of the Leisure Venue Catering Market

Overall, revenue of catering at leisure venues has grown 15% from 2003-2008 to an estimated current value of £2.2 billion. However, it has not kept pace with total revenues of the host venues. This suggests that they are underperforming overall. Table 5.2.1 illustrates leisure venue and catering revenue since 2003, and projected figures to 2013. There was a drop in catering revenues in 2008 as a result in a decline in attendance to leisure venues. Furthermore, the impacts of the recession create a ‘double-whammy’ effect on catering. Firstly, fewer people are visiting the venues and those that do visit, tend to spend less on catering, or bring their own food to the premises instead.

Table 5.2.1 – Leisure Venue Catering – Market Size (2003-13)

	Total expenditure at leisure venues	Catering	Catering at 2003 prices	Catering as a % of total
	£m	£m	£m	
2003	6,614	1,900	2,227	29
2004	7,177	2,014	2,346	28
2005	7,788	2,064	2,376	27
2006	8,028	2,153	2,428	27
2007	8,297	2,221	2,394	27
2008 (est)	7,882	2,185	2,185	28
2009 (forecast)	7,894	2,216	2,173	28
2010 (projected)	8,084	2,236	2,153	28
2011 (projected)	8,379	2,307	2,178	28
2012 (projected)	8,727	2,380	2,207	27
2013 (projected)	9,053	2,451	2,229	27

Source: Mintel/RGA

The recession has also coincided with a rise in costs for venues, which has narrowed the margins for catering. Another result of this is that it has led to little innovation in the sector, as operators have kept to the tried and trusted routes due to increased costs and smaller revenues.

Mintel argue that the value of leisure venue catering is skewed by the size of the nightclub sector, which accounts for half of the total market. Nevertheless, they highlight the strong growth of 'historic buildings and museums and art galleries'.

There remain two key contract caterers who dominate the market – Compass and Sodexo. However a large number of venues keep catering in-house. Notable venues that do this include the Tate Galleries and London Zoo.

From a consumer perspective, Mintel highlight that there remains key issues regarding leisure venue catering, which are that 'they perceive them to be expensive, are put off by long queues and regard the food and drink on offer as often being of poor quality.'

5.3 COMPETITOR SET

A market area of a 10-minutes drive time was set to analyse the local provision of catering facilities. Table 5.3.1 indicates the restaurant provision in the local market area, categorised by cuisine type.

Table 5.3.1: Sample Restaurant & Café Provision Overview in Market Area (10-Minutes Drive)

Style	Number of Units
Café	6
Traditional Fair	4
Chinese	2
Indian	2
Thai	1
Other	4
Total	**19**

Source: RGA Research

12 restaurants and six cafés were identified within the market area. This small supply may reflect a lack of disposable income in the local area. A list of all restaurants and a map of their locations identified is presented in Appendix D.

The majority of restaurants identified are clustered around Musselburgh, with the remaining four spread over the area. The nearest restaurant to the project site is the Prestoungrange Gothenburg, which is the only restaurant identified in Prestonpans. Any new catering offering must be carefully considered in order to avoid customer displacement from the Prestoungrange Gothenburg.

5.4 IMPLICATIONS OF THE ACORN PROFILE

Despite the lack of disposable income in the immediate Prestonpans area, the propensity to eat out in the wider 0-30 and 30-60 minutes areas are higher than the national averages.

Table 5.4.1 Acorn date – propensity to eat out

Restaurant Visits	0-30 Minutes		30-60 Minutes		60-90 Minutes	
	Propensity	Index	Propensity	Index	Propensity	Index
Eating out during the day at least once a month	15.9%	111	15.9%	112	13.9%	98
Eating out at night at least once a month	26.7%	108	26.8%	109	23.3%	94

Source: Acorn/ RGA Research

The projected increase in population should be favourable opportunity for increased supply.

5.5 SUMMARY

Key findings from this section include:

- The leisure venue catering sector has grown by 15% between 2003 and 2008 to a current value of £2.2 billion. Historic buildings and museums have experienced positive growth in the time period However, this increase is below that of leisure venues which suggests that some leisure venue caterers are not maximising their services;

- Rising costs and falling visitor numbers due to the reception have narrowed operators' cost margins;

- Key customer views indicate that leisure venue catering is too expensive, of poor quality and there are too many queues;

- There is a limited supply of restaurants within ten minutes of the site. This is most likely due to the lack of disposable income in the area.

- The propensity to eat out in the 0-30 and 30-60 minutes drive times is higher than the national averages.

- The projected population growth is favourable for an increase in supply.

5.6 CONCLUSIONS

It is recommended that a catering offering is developed that does not compete directly with the Gothenburg.

6. LEISURE VENUE RETAIL

6.1 INTRODUCTION

Like catering, a retail offer at leisure venues is an important income generator and customer expectation. As a result, many operators are paying more attention to the format and quality of their retailing activity, and may even seek to extend their brands into mail order and online provision.

In this section, the development opportunities for leisure retail products at Prestonpans are explored. A full list of competitor properties and a map of their locations is presented in Appendix E.

6.2 SUMMARY OF THE UK LEISURE VENUE RETAIL MARKET

6.2.1 Key Points from 2001 Mintel Report

The previous feasibility study gave a retail overview drawn from Mintel's *Retailing at Leisure Venues* (August 2001) report. Mintel have not updated this study, therefore there is only a brief mention in this section of the report, given the changes to the environment in that time. A brief overview of the sector has been taken from Mintel's 'Retail Review' (March 2009) and is presented in the following section.

Mintel forecasted a strong outlook for the leisure retail sector in 2001, with high customer confidence and disposable income levels suggesting that attendance to leisure venues would continue to grow. Looking at Mintel's 'Leisure Venue Catering', it is true that even with the recession, this has continued to occur to some extent.

The museums and art galleries sector is the largest within the market, accounting for nearly two-fifths of all sales. This reflects the high volume of such sites within the UK and the fact that an increasing number of museums and galleries have abolished admission fees, making them increasingly reliant on revenues generated from commercial activities once visitors are inside the venues. The value of the historic buildings retail market is also linked to a high volume of sights and the existence of "national operators" such as the National Trust, The National Trust for Scotland, English Heritage and Historic Scotland. The two largest operators in historic building retail are the National Trust and English Heritage, which between then operate more than 350 shops in the UK.

This in turn is expected to lead to a greater degree of "professionalism" in leisure venue retailing so that the layout, product range, pricing and service are comparable with the best high street retail operators. This may help to increase the average spend per transaction, as well as encourage customers to return to venues specifically to visit the shop.

6.2.2 Mintel 2009 Retail Review

Mintel's *Retail Review* (March 2009) highlights the weakening of the sector due to the economic recession. However, it should be noted that this is for the retail sector as a whole and that there is no data available specific to leisure venues. Similar to catering, they acknowledge that there is less consumer spending occurring due to the recession, and it can be assumed that visitors to leisure venue are cutting back on their retail spending there.

Whereas families are having to cut back on spending, Mintel not that younger people are continuing to spend and are putting less emphasis on financial planning. Furthermore, they add that 'older affluent consumers' are well placed to deal with the effects of the recession.

Mintel also highlight a number of trends necessary to deal with the recession. These include greater diversification of products, downsizing, investing in services (e.g. investing in training staff), conducting consumer research and providing better value products (rather than viewing the cheapest as the best).

6.3 MARKET AREA LEISURE RETAIL SET AND IMPLICATIONS OF THE ACORN PROFILE

The supply of destination retail in the immediate area is weak. Within 10-minutes drive of Prestonpans there are four gift shops ('UpMyStreet.com"). A number of them specialise in greeting cards.

The high percentage of the "Urban Prosperity" group within the 30-minutes drive is likely to be a positive opportunity for the project. This group includes wealthy older people who tend to be both cash and time rich and therefore more likely to visit leisure retail outlets.

6.4 FINDINGS

- Mintel's 2001 forecast predicted a strong outlook for the leisure retail sector due to high customer confidence and disposable income levels. The economic recession has impacted on the retail sector overall, therefore the outlook would be weaker than predicted;

- Consumer spending in the retail sector has been reduced dramatically reduced. It is likely that this is occurring in the leisure venue retail sector, similar to catering;

- The supply of destination retail in the immediate area of Prestonpans is weak;

- The high percentage of the "Urban Prosperity" group is positive for quality retailing at the project.

6.5 CONCLUSIONS

It is recommended that the retail offer is defined based on final visitor centre positioning and content.

7. *THE LEISURE LEARNING MARKET*

7.1 LEISURE LEARNING

The leisure learning product focuses on a hobby or pastime; painting, gardening skills, nature study, or photography, for example. Typically participants work with a suitably qualified instructor to create or make something that they can take away with them at the end of the course.

This product appears to be particularly attractive to the older market, which has the time and the resources to undertake this type of activity. The growth of institutions such as the University of the Third Age illustrates the demand for new learning opportunities without the pressure of formal assessment.

Data currently available for this sector is fragmented. The analysis in this section was presented in the previous study and has been updated where possible.

7.2 COMPARATOR OVERVIEW

The City and Guilds website lists many establishments that run leisure learning courses. They vary in terms of ownership and characteristics; some are part of a local authority, some are run by charitable trusts and some are attached to universities.

The sector is rather fragmented and as such a comprehensive list of course offerings has been difficult to establish. There is currently only one establishment in Scotland listed on the City and Guilds website; the Field Studies Council in Perthshire offers classes on both residential and non residential bases. There are, however, many venues that offer leisure learning classes centred on their specialist fields.

Non-Residential Learning
A variety of non-residential leisure learning classes were also reviewed. The Royal Botanic Garden in Edinburgh, as an example, offers both day and evening classes for adults. Courses have been designed for those with interest in the horticulture, botany and the environment, as well as arts, photography and wellbeing. Classes last for one day, a weekend or over the course of a term. Rates are variable with the prices varying depending on the type of course. As an example, prices for photography day classes range from £31.50 to £45.

The City of Edinburgh Council also offers a range of leisure classes all year with classes ranging from 8-16 weeks at a range of locations (generally schools) across the city. These classes vary greatly in price depending on subject.

7.3 YOUTH AND COMMUNITY EDUCATION

RGA also researched the potential to deliver education for the disadvantaged community in Prestonpans. RGA worked on a similar project in England at Wentworth Castle and Stainsborough Park Trust (see Appendix F).

The Trust, worked with the local Council and the Groundwork Trust in England, to develop educational projects for NEETs (not currently involved in employment, education or training). Wentworth's role is essentially that of providing a venue and facilities while the Groundwork Trust is responsible for programme delivery.

The project has achieved high levels of community benefit to date. The Trust is currently looking to expand their facilities and develop a kitchen for culinary training which can also be used for commercial purposes.

Initial consultations with Youth Link Scotland detailed in Appendix F have identified possible partnership and delivery options for community education. Youth Link Scotland, the national youth work agency in Scotland, provides free services to communicate the project to its members; thereby facilitating partnerships across the country.

Although there is limited capital and revenue funding available for such projects, this option will not add to the revenue stream and must be sustainable by other means. It is suggested for the community benefits it will generate.

7.4 FINDINGS

- Leisure Learning has the potential to generate additional commercial income;

- Courses cover a range of subjects but popular activities include the arts and crafts, hobbies, wildlife and nature and health and wellbeing;

- The sector is fragmented and detailed listings of establishments offering courses is not readily available.

- Youth and Community education will attract limited funding; however there is a large community merit to pursuing it;

- Youth Link Scotland would be a valuable resource for sourcing partners in the sector.

7.5 CONCLUSIONS

RGA believes that the visitor centre would be in a strong position to develop leisure and community education programmes. The visitor centre should consider appointing a Learning and Education Manger that can facilitate educations programmes and establish links with partner organisations that can deliver them.

8. CONSIDERATION OF THE RESEARCH FINDINGS

8.1 INTRODUCTION

Based on the research, our sector knowledge and client meetings RGA used various tools to summarise and analyse the research and develop a product mix that creates a sustainable product.

8.2 FORCES FOR CHANGE

Having reported the key findings of our research RGA worked with the client group to better define the overall concept. This was conducted for the previous study, however remains relevant to the reassessment. Using the "Forces for Change" toolkit, some key points emerged:

Table 8.2.1: Forces for Change

What Is Needed?	- A project that meets a demonstrated need - A sustainable, deliverable initiative - Community benefits as key drivers - A transforming and revitalising effect - The community should engage with the project and take responsibility for driving it forward. - A project that generates education, training and learning outcomes - A project that creates a legacy for the community - An authentic and authoritative place that represents best knowledge - A project that embraces "Victory, Hope and Ambition" as its core theme
What Is Not Needed?	- A project that does not have substance or integrity, or ignores its community - Job placements for students - Failure to employ local people (At least 50%) - Displacement or competition with other initiatives in the area - Failure to attract visitors into Prestonpans from off the A1 - A stagnant initiative which flounders
Barriers To Delivery	- Failure to acquire the required land - The project stalling or becoming exhausted because of a lack of momentum
Project Theme	- The project should evoke feelings of "Victory, Hope and Ambition" for the community.

8.3 SWOT ANALYSIS

Based on the research and the results of the workshop, RGA have undertaken a SWOT analysis of the findings, prepared from the point of view of the Trust.

Table 8.3.1: SWOT Analysis

Strengths	**Response**
- Historic significance of the Battle	- Incorporate Battle as the central theme
- Proximity to the A1 with good transport links	- Signage visible from the A1(and passing trains) that generates interest
- success of other arts and community initiatives to date	- Centre that showcases other aspects of the Prestonpans community through exhibitions, guided tours, and events
Weaknesses	**Response**
- Location at Prestongrange is not close to the Battlefield	– Ensure that the product offering is strong enough that visitors do not necessarily need to visit the site. Also, increase interpretation at the Battlefield and ensure that the BattleBus can cope with visitor numbers
– No significant regeneration or inward investment is planned for Prestongrange as of yet	– Continue to work with the Council to encourage redevelopment of Prestongrange
Opportunities	**Response**
- Increased employment and learning opportunities for the community	– Employ locals where possible
- Large percentage of “Urban Prosperity” with disposable income and a huge population increase is predicted for the East Lothian area	– Develop activities that will cater to this population to optimise charitable income
- Prestongrange redevelopment	– Cross ticketing and joint marketing possibility to develop an inclusive destination
- Lack of catering in the area	– Develop an offer that appeals to the growing population. It must be high quality and unique but not compete with the Gothenburg.
- Research has indicated a lack of accredited leisure learning facilities in the market area; this is a growing market	– Capitalize on this as it represents a significant opportunity for revenue generation
- QMU interest in collaboration with the Centre	– Development of multi functional venue that can be used for QMU to deliver the education

Threats	Response
- Significant visitor numbers overwhelm the community and lead to alienation	– Create a place outside of the centre of Prestonpans where visitors and the community meet
– No progress in the redevelopment of Prestongrange	– Explore alternative locations for the Centre
– The opening of three new/redeveloped museums in the East Lothian area within the next few years	– Ensure that the Centre stands out from the competition. Also, look at joint marketing with the museums if possible
– A potential 'double-dip' recession that reduces visitor numbers to Scotland	– Focus on activities and events that cater to the local market
– The majority of visitors to the Lothians don't venture outside of Edinburgh	– Develop a unique product that will entice visitors with something different

8.4 INDICATIVE BENEFITS

Each proposed component has been judged in general terms of the economic, community and sustainability objectives for the project where three ticks indicate it strongly meets the objective.

Table 8.4.1 Summary of Benefits

Components	Economic Benefit	Community Benefit	Sustainability
Visitor Centre	✓✓✓	✓✓	✓
Leisure Catering	✓✓✓	✓	✓✓✓
Leisure Retail	✓✓✓	✓	✓✓✓
Leisure Learning	✓✓✓	✓	✓✓✓
Youth and Community Learning	✓	✓✓✓	

Based on these findings, none of the components rate highly in fulfilling all three of the objectives; however, if multiple elements are developed in tandem, they have the potential to generate positive economic impact, community benefits and financial sustainability.

In conclusion, RGA have devised two development options for Prestonpans.

8.5 DEVELOPMENT OPTIONS

8.5.1 Option A

Develop the Living History Centre with all the components – i.e. visitor attraction, retail, catering and potential learning components.

8.5.2 Option B

Progress the learning components as stand alone provisions; Leisure Learning will generate revenue and provide positive economic impact while community learning fulfills the community aspirations of the client.

As RGA found no inherent barriers to developing a visitor centre, we have outlined a business model to ascertain the financial sustainability for Option A.

The approach is clearly highly subjective; sustainability of the core visitor option is modelled in Section 9.

8.6 STRATEGIC DIRECTION

At a workshop with the Trust we established the strategic direction for the Visitor Centre against a framework.

Purpose	- A manifestation of the regeneration of Prestonpans - Safeguarding and interpreting the site
Attitude (internal values)	- Proud to show visitors what we are achieving - Able to influence our own success
Identity (external image)	- Surprising achievement - Authentic
Standards	- Authoritative - Best and evolving state of knowledge about the Battle
Benefits to users	- Visitors – a great experience of Scottish history - Residents – always something going on, self fulfilment and hope - School age – see their future opportunities by showing the hopes of the Jacobites - Partners – delivery platform, placement

9. VISITOR PROJECTIONS

9.1 INTRODUCTION

In this Section, we present projected visitor numbers for the visitor centre at Prestonpans, and the assumptions on which they are based. The assumptions are informed by our own research programme and our understanding and experience of the Scottish visitor attractions market.

The visitor projections below were calculated based on the Centre opening in 2013. This is an entirely illustrative time line and the content will not vary greatly based on the Trust's decision to revise the opening to 2014. See Section 11 for a detailed Action Plan.

9.2 VISITOR PROJECTIONS

Visitors to the redeveloped paid attraction have been calculated using the following process:

- Identifying and sizing the potential markets for the attraction, broken down by age
- Applying growth factors to each segment to reflect estimated, future changes,
- Applying a penetration rate for each market, based on our experience of market segmentation of visitor attractions and other available data,

For the purposes of this study, we have assumed that the site will open in 2013. The facilities have not yet been specified, but we assume that they will be of the nature, scale and to the standards described later I this section, and that operation, management and marketing will be effective.

9.2.1 Local Population (East Lothian)

The immediate area population was sized using Scottish Government statistics. In 2009, the population of East Lothian was 96,830. Between 2009 and 2033, the population of East Lothian is forecast to increase by 32%, say 1.3% per year. Applying this annual rate of change to the 2013 population figure generates the following population forecast for East Lothian for 2013 to 2015:

Table 9.2.1: East Lothian Population, Financial Years Ending 31st March 2013-2015

	2013	2014	2015
Above Working Age	19,821	20,878	21,991
Of Working Age	60,581	63,812	67,216
Below Working Age	21,666	22,822	24,039
Total Population	**102,068**	**107,512**	**113,246**

Source: Scottish Government/RGA

9.2.2 Day Visit Market

The Day Visit Market has been sized using the information provided in the ACORN profile. This was commissioned for the previous study and is being used again for the reassessment. The 2010 population forecasts from the profile are considered to be the current figures. Using the projected population growth taken from the General Registers Office for Scotland, we have calculated the anticipated population for the 30-minutes and 90-minutes drive catchments for the proceeding eight years. As a result, we consider the 0-30 minutes drive catchment to contain 339,040 individuals. By 2018, the population in this area is forecast to increase to 341,724. The 30- 90 minutes drive catchment consisted of 2,211,633 individuals and is projected to increase to 2,230,057 by 2018. The East Lothian population have been subtracted from the total population figures to avoid double-counting. The market area populations for the day visit market are therefore:

Table 9.2.2/1: Day Visit Population within 30-Minutes Drive of Prestonpans, 2013-2015

	2009	**2010**	**2011**
Above Working Age	41,158	42,650	44,197
Of Working Age	168,587	167,744	166,905
Below Working Age	29,910	29,948	29,985
Total	**239,656**	**240,342**	**241,087**

Source: CACI/General Resiters Office for Scotland/RGA

Table 9.2.2/2: Day Visit Population within 30-90 Minutes Drive of Prestonpans, 2013-2015

	2013	**2014**	**2015**
Above Working Age	361,750	374,864	388,452
Of Working Age	1,303,695	1,297,176	1,290,690
Below Working Age	324,957	325,363	325,769
Total	**1,990,401**	**1,997,403**	**2,004,912**

Source: CACI/General Resiters Office for Scotland/RGA

9.2.3 Education

The schools market was approximated using the schools census data produced by the Scottish Government. As there will be no updated census data until 2011, the figures used are for 2001, and hence, the same as the previous study. For this purpose we have assumed that all schools within the local authorities included in the market area were considered; in our experience, schools are willing to travel if the attraction provides a suitable fit within the national curriculum. A total, in 2002 of 232,810 primary school pupils and 181,505 secondary school pupils were identified in the market area. The population below working age is expected to decline by -1% by 2033 so has been used for the time period for this study.

School numbers for the paid attraction education market from 2009-2011 are:

Table 9.2.3: Schools Education Market, 2009-2011

	2013	**2014**	**2015**
Primary	207,201	204,507	201,849
Secondary	161,539	159,439	157,366
All pupils	**368,740**	**363,946**	**359,215**

Source: Scottish Government/RGA

We have not subtracted education numbers from the local population figures because we believe that it is possible to capture a visit from those under 16 twice; once through their families and once through their schools.

9.2.4 Tourist Markets

The tourism market for the project has been defined as all holiday and visiting friends and relatives (VFR) tourists in the 90-minutes drive region, which broadly covers Edinburgh and Lothians, half of Greater Glasgow and the Clyde Valley, Fife, Perthshire and Borders VisitScotland areas. Due to the effects of the economic recession, the growth figures used are lower than in the previous study. VisitScotland no longer provide forecasts of predicted visitor numbers, hence we have calculated our figures based on VisitBritain's forecasted visitor numbers to the UK, and our own predictions (based on no significant changes occurring to the market environment and that the Pound does not weaken against the Euro). Using these methods, we anticipate the growth rate of domestic tourism to 2013 to be 8%, while we predict the overseas growth rate to be 7%. Applying these growth rates to current tourism performance (2009 data), the potential UK and overseas tourism market for the paid attraction is:

Table 9.2.4: UK And Overseas Tourist Population, 2009-2011

	2013	**2014**	**2015**
Total UK	5,041,404	5,176,009	5,314,208
Total Overseas	1,931,146	1,976,142	2,022,186
Total Tourists	**6,972,550**	**7,152,151**	**7,336,394**

Source: VisitScotland/RGA

9.2.5 Special Interest Markets

It is anticipated that the Visitor Centre will be of considerable interest to those with an interest in a broad range of arenas (Scottish History, "dark tourism", archaeology etc.). The economic benefits of the project will be maximised by visits to Scotland from overseas. At this stage it has not been within the remit of this Study to conduct primary research. VisitScotland estimates that there are approximately 28 million members of the Scottish Diaspora worldwide, with concentrations in the USA, Australia, New Zealand, Canada and South Africa as well as in the rest of the UK – these people could be a primary target audience. At this stage we have not included them as a discrete market.

9.2.6 Total Gross Market Potential

Table 9.2.6 summarises the potential markets for the paid attraction element of the Visitor Centre.

Table 9.2.6: Potential Attraction Gross Market, 2013-2015

	2013	**2014**	**2015**
East Lothian Residents	102,068	107,512	113,246
Day Visit (0-30 Minutes)	239,656	240,342	241,087
Day Visit (30-90 Minutes)	1,990,401	1,997,403	2,004,912
Education	368,740	363,946	359,215
UK Tourists	5,041,404	5,176,009	5,314,208
Overseas Tourists	1,931,146	1,976,142	2,022,186
Market Size	**9,673,415**	**9,861,354**	**10,054,854**

Source: RGA

9.2.7 Penetration rates

In deriving the visitor projections it is implicit that the Living History Centre achieves a significantly raised profile and a top quality positioning as an attraction. Furthermore, the projections are based upon strong collaboration with Prestongrange Heritage Museum to create an inclusive destination. To place our selection of the penetration rates in context we examine a relevant attraction category "Heritage/Visitor Centre". The Attraction Monitor lists 100 in this category. In total, there were 6,694,004 visits to such attractions, a 2.3% increase on 2008 figures.

The following penetration rates for the paid attraction have been applied:

Local Residents: 5%

It is felt that this rate is achievable given the emerging existing connections between the BPHT and the local community and the aspirations of the development to instil a sense of pride in local residents. Local residents will also accompany VFR tourists on a visit.

Day Visit: 0-30-minutes drive: 1.1 %

The ACORN profile and applied Mintel data suggested that residents within the 0-30 minutes drive catchment had a propensity of 18.4% to visit castle or places of historic interest. Our research shows that there are 87 attractions within the market area. Dividing the propensity of 18.4% by the 87 attractions produces a "fair share" penetration rate of 0.22%. This means that if all attractions were equally attractive to the visitor, each would penetrate the market at a rate of 0.22%. In our opinion the positioning and quality of the Centre is sufficiently attractive that it should achieve a penetration rate of five times this level, resulting in a projected penetration rate of 3.44%.

Day Visit: 30-90 minutes drive: 0.43%.
The ACORN profile of this area revealed a propensity of 17.35% to visit castles or places of historic interest. This area is considerable, including areas of Glasgow, Edinburgh and much of the Central Belt. There are 201 such attractions within the market area, resulting in a "fair share" penetration of 0.09%. Again we have increased this by a factor of five to reflect the overall positioning and market appeal of this product, resulting in a penetration rate of 0.43%.

Education Market (Primary): 0.50%
RGA experience indicates that in general, primary school pupils visit an attraction once during their seven-year primary career. The overall penetration rate for this market is therefore 1/7, or 14.29%. However, we have assumed that due to the presence of other potential school trip destinations within the market area and the requirements of the school curriculum and likely teacher preference, the Centre will "compete" with other attractions to secure visits. There are about 149 attractions within the market area that welcome group visits, resulting in a "fair share" penetration of 0.10%. We have assumed, given the presence of a dedicated Education Officer, that Centre can increase its fair share penetration by a factor of five, so have applied a penetration rate of 0.50% to the primary school market.

Education Market (Secondary): 0.10%
School trips for secondary schools are generally much less frequent than for primary schools, largely due to the short lesson times allocated to each subject and the difficulties encountered in taking large numbers of pupils (who may have different timetables) out of school for the day. To reflect this, we have reduced the primary school penetration rate by a factor of five, producing a penetration rate of 0.10%.

UK Tourists: 0.78%
Composite data from VisitScotland areas shows that 37% of domestic tourists visit a historic monument or a castle during their stay. We have divided the resultant events by the competitor set of 285 attractions to give a "fair share" penetration rate of 0.13%. We believe that the positioning and characteristics of the Living History Centre, and its positioning as one of the definitive locations to experience and understand the Jacobite History are sufficient for it to increase this fair share rate by a factor of six.

Overseas Tourists: 1.48%
VisitScotland data shows that 71% of overseas tourists visit a historic monument or a museum during their stay, resulting in a "fair share" penetration of 0.25%. As with the UK tourism market this has been increased by a factor of five to reflect the strong association between Bonnie Prince Charlie and Scotland and the anticipated quality of the visitor experience. A penetration rate of 1.48% has therefore been applied.

9.2.8 Typical Attendance Pattern

Attendance at new visitor attractions typically shows a "crag and tail" pattern, where attendance peaks in the first year of opening and declines to a stable level from year 3 onwards.

This is attributed to increased interest during the first two years due to pre-opening publicity, media attention, etc. Accordingly, we have increased the penetration rates from the levels described above for all markets by 15% for 2009. The number of paid visitors for 2010 is the “stable year” position.

Penetration rates for each market are therefore:

Table 9.2.8 Market Penetration Rates For The Paid Attraction, 2013-2015

	2013	2014	2015
Local Residents	5.75%	5.00%	5.00%
Day Visit (Local – 30 Minutes)	1.26%	1.10%	1.10%
Day Visit (30-90 Minutes)	0.50%	0.43%	0.43%
Education Primary	0.58%	0.50%	0.50%
Education Secondary	0.12%	0.10%	0.10%
UK Tourists	0.89%	0.78%	0.78%
Overseas Tourists	1.71%	1.48%	1.48%

Source: RGA

9.2.9 Attendance at the Paid Attraction

Applying the penetration rates in table 9.2.8 to the markets in table 9.2.7 generates the following attendance pattern for the first three years of the operation of the Living History Centre:

Table 9.2.9/1: Battle of Prestonpans Heritage Trust Paid Attraction Attendance, 2013-2015

	2013	2014	2015
Local Residents	5,869	5,376	5,662
Day Visit (Local – 30 Minutes)	3,019	2,632	2,640
Day Visit (30-90 Minutes)	9,871	8,621	8,653
Education Primary	1,194	1,025	1,012
Education Secondary	186	160	158
UK Tourists	45,038	40,209	41,283
Overseas Tourists	32,962	29,330	30,013
Total Attendance	**98,139**	**87,353**	**89,422**

Source: RGA

The distribution of visitors by age group was calculated using 2010 Scottish Government data for the population of East Lothian, 2004 Census population data the drive time segments, while the tourist data was segmented using data supplied from VisitScotland. All educational visits are, needless to say, included in the ‘Below Working Age’ cohort. Table 9.2.9/2 provides an overview by broad age group for visitors to the paid attraction.

Table 9.2.9/2: Age of Visitors to the Paid Attraction, 2013-2015

	2013	2014	2015
Above Working Age	12,562	11,255	11,598
Of Working Age	72,016	64,053	65,525
Below Working Age	13,561	12,045	12,298
All Visitors	**98,139**	**87,353**	**89,422**

Source: RGA

9.2.10 Comparative Performance

The visitor projections are that during a stable year the visitor centre will attract approximately 91,000 paying visitors per annum. This figure has been analysed against key regional and national comparators to ensure that our judgements are as robust as possible.

VisitScotland's *Scottish Visitor Attraction Monitor* 2009 shows that the top performing attractions report a very wide range of visitor numbers. Of the paid attractions in the 90-minutes area, 13 report visitor numbers in excess of 100,000. Only one, Edinburgh Castle, reports in excess of a 1 million visitors (1,196m). The second placed paid attraction, Edinburgh Zoo, reports just over half of the number of visitors recorded by Edinburgh Castle. One attraction, the Scottish Seabird Centre, is situated in East Lothian. It is positive to note that the majority of attractions in the survey experienced a growth in visitor numbers in 2009.

Table 9.2.10: Paid visitor attractions with over 100,000 Visitors in the 90-minutes market area

Name	2008	2009	% Change
Edinburgh Castle	1,128,394	1,196,481	6%
Edinburgh Zoo	661,946	636,867	-3.8%
The Falkirk Wheel	500,829	476,778	-4.8%
Stirling Castle	375,345	383,293	2.1%
New Lanark Visitor Centre	341,340	334,185	-2.1%
Our Dynamic Earth	298,288	298,287	0%
Scottish Seabird Centre	279,166	291,474	4.4%
The Royal Yacht Britannia	255,806	258,388	1%
Scotch Whisky Heritage Centre	220,132	238,542	8.4%
The Real Mary King's Close	180,279	175,025	-2.9
Rosslyn Chapel	131,312	138,849	5.7%
National Wallace Monument	115,774	126,237	9%
Almond Valley Heritage Centre	100,166	118,649	18.5%

Source: 2009 Visitor Attraction Monitor/RGA Research

Primary market research by RGA has examined various Scottish icons (whisky, Burns and Tartan) finding them to be "essential components of the Scottish tourism experience". They are generally not significant drivers of tourism in their own right. It is our opinion that the subject of Bonnie Prince Charlie would fall into this category of "iconic Scotland".

As a parallel it is worth examining trends in distillery visiting. The Famous Grouse Experience in Crieff is a paid distillery that reports the highest visitor numbers in the sector at 120,000 (2005 figure). This is a tourism initiative on a popular tourism route and backed by a major international brand. Glenkinchie Distillery (East Lothian) reported 23,634 visitors in 2009– one-fifth of the leading attraction in this category.

Amongst battlefield sites Bannockburn attracted 50,571 and Culloden 112,178 visits in 2009 – we foresee BPHT being capable of achieving numbers somewhat between those of these two attractions.

Within the context of these comparisons, RGA is comfortable that our projections are “reasonable”.

9.3 CATERING

The percentage of visitors who, having experienced the paid interpretation area, then go on to visit the café, has been estimated at 50%. There is very little reliable published data available on this subject, so the figure is based on previous RGA experience and the database we maintain based upon a number of comparable visitor attractions. It is felt to be achievable assuming that the café enjoys a prominent positioning within the overall building design. We have applied this figure to all markets apart from the education market; our experience is that schools generally bring packed lunches and that large school groups in the catering area can prove disruptive to other customers and should therefore be allocated their own dedicated space. We have therefore applied a much lower capture rate of 5% to school visitors to represent vended items and snacks.

The café may also attract use from the visitor segments that have not been to the paid attraction but have visited the overall site. However at this stage, before design and site details are developed we have taken a token level of catering destination visits.

Table 9.3.1: Visitors to the BPHT Café, 2009-2011

	2013	**2014**	**2015**
Paying Visitors	43,679	38,894	39,830
Destination Visitors	5,000	5,000	5,000
Total Visitors	**48,679**	**43,894**	**44,830**

Source: RGA

9.4 RETAIL

As with the café, we have estimated the capture rate of the shop from people visiting the paid attraction. Based on RGA experience, the data set that we maintain and industry knowledge, this has been set at 30% and applied to all markets.

The shop may also appeal to non-paying visitors to the site who are drawn into the building for a 'look'. We have taken a modest level of non attraction, retail visitors.

Table 9.4.1: Visitors to the BPHT Retail Facility, 2013-2015

	2013	**2014**	**2015**
Paying Visitors	27,479	24,459	25,038
Destination Visitors	2,000	2,000	2,000
Total Visitors	**29,479**	**26,459**	**27,038**

Source: RGA Research

9.5 SEASONAL DISTRIBUTION AND PEAK HOUR USAGE

In order to plan and design new facilities effectively, it is necessary to determine how the attendance figures presented above (Section 9.2.9) will be distributed by quarter. In this Section we examine the possible seasonal pattern of visitation. This is then used to determine the usage rates of the facility at any one time and thereby the estimated 'design day peaks'.

9.5.1 Visitors to the Paid Attraction

The distribution of visits to the paid attraction has been determined as follows:

The UK and overseas tourism visitors have been distributed according to data for tourism in the market area region, which is presented in the Table below. Again, cognisance should be given to the inclusion of Edinburgh (which attracts year round visitors) within the market area region.

Table 9.5.1/1: Seasonal Visiting Pattern, UK and Overseas Tourists to the Market Area

Quarter	**UK Tourists (%)**	**Overseas Tourists (%)**
Q1 (January – March)	21%	17%
Q2 (April – June)	25%	26%
Q3 (July – September)	30%	40%
Q4 (October - December)	24%	17%

Source: VisitScotland/RGA

Education visits are restricted to term time. Examination of the school year calendar shows that 23% of total term time occurs during the first quarter of the year, 28% in the second, 18% in the third and 31% in the fourth. These percentages have been used to distribute the school visits throughout the year.

Theoretically day visitors and the local population would always be available to visit. However, tourism statistics suggest that the days-out market also shows a seasonal pattern. Day trips have to compete with domestic and family events such as Christmas, and are less likely to take place during bad weather.

The seasonal distribution of visits from these markets has been distributed according to the reported distribution of visits for attractions in 2009: 19%, 26%, 35%, 20% for quarters 1, 2, 3 and 4 respectively.

Table 9.5.1/2: Seasonal Visiting Pattern, BPHT Paid Attraction, 2013-2015 (all markets)

Quarter	2013	2014	2015	% of all visits
Q1 (January – March)	18,277	16,280	16,672	19%
Q2 (April – June)	25,672	22,844	23,381	26%
Q3 (July – September)	34,352	30,564	31,278	35%
Q4 (October - December)	19,838	17,665	18,092	20%
Total	**98,139**	**87,353**	**89,422**	**100%**

Source: RGA

Average and peak daily attendance (twice the average daily in the peak quarter) at the paid attraction, based on the visitor numbers above, is presented in Table 9.5.3. The peak attendance year has been determined as financial year ending 2014, reflected in the visitor numbers for this year.

Table 9.5.1/3: Average and Peak Daily Paid Attraction Visitor Numbers, 2014

	Days	**2014**
Q1 Average	90	181
Q2 Average	91	251
Q3 Average	92	332
Q4 Average	92	192
Peak Daily Attendance		**664**

Source: RGA

During a peak design day, a total of 553 visitors are projected to visit the paid attraction. Visitation does not flow uniformly throughout the day but rather peaks at certain times. Based on RGA’s previous experience, during a peak hour 20% of the daily throughput will arrive on site. Assuming an average dwell time of one hour forty-five minutes, the peak design visitation at any one time in the paid attraction area is:

Table 9.5.1/4: Peak Attendance at the Paid Attraction

Peak Day (Q3)	664
Peak Hour (20%)	133
Average Dwell Time (Minutes)	105
Peak Attendance	**233**

Source: RGA

Based on the calculations presented above, we recommend that the paid interpretation area be sufficient to accommodate say 250 visitors at any one time.

9.5.2 Café

The distribution of visitors to the café reflects is computed by reference to all users to the facility as presented in Table 9.5.1/1. The annual distribution of visits by quarter is therefore:

Table 9.5.2/1: Seasonal Visiting Pattern, BPHT Café, 2013-2015 (all markets)

Quarter	2013	2014	2015
Q1	9,084	8,193	8,371
Q2	12,717	11,465	11,708
Q3	17,020	15,343	15,667
Q4	9,858	8,892	9,085
Total	**48,679**	**43,894**	**44,830**

Source: RGA

There are clear 'peak' periods with respect to the flow of visitors utilising catering facilities, notably between 11:30 and 2:00; we predict that during the peak hour, 30% of the daily throughput will be achieved. Based on an average dwell time of half an hour, and a peak year in 2014, the peak attendance levels in the café are:

Table 9.5.2/2: Peak Attendance at the BPHT Cafe, 2014

	2014
Peak Day (Q3)	334
Peak Hour (30%)	100
Average Dwell Time (Minutes)	30
Peak Attendance	50

Source: RGA

At any one time, the café should be capable of handling a design peak of at least 60 visitors.

9.5.3 Shop

Visitor numbers for the shop have been distributed on the same basis as those for the café:

Table 9.5.3/1: Seasonal Visiting Pattern, BPHT Shop, 2013-2015 (all markets)

Quarter	2013	2014	2015
Q1	5,492	4,931	5,041
Q2	7,710	6,919	7,069
Q3	10,317	9,257	9,457
Q4	5,959	5,351	5,470
Total	**29,479**	**26,459**	**27,038**

Source: RGA

In RGA's experience the retail hourly visitation follows a similar pattern as visitation to the paid attraction, average and design peak daily visitor numbers are presented in the Table below. We have assumed an average dwell time of 15 minutes.

Table 9.5.3/2: Peak Attendance at the BPHT Shop, 2014

	2014
Peak Day (Q3)	201
Peak Hour (20%)	40
Average Dwell Time (Minutes)	15
Peak Attendance	**10**

Source: RGA

At any one time, the shop must be capable of accommodating 15 purchasers. It should be noted that each purchaser may be accompanied by other visitors and that the retail area must be sufficiently attractive to encourage browsing. We therefore recommend that the size of the retail area be sufficient to accommodate one coach party (say 30 individuals) at any one time.

9.6 ADDITIONAL FACILITIES

In addition to the paid interpretation area, café and shop, additional facilities will be required to meet the requirements of key markets. The following are based on the facilities that were considered in the previous study, and are still relevant. They are:

Facility	Target Markets	Purpose/requirements	Size
Classroom	Primary Education Secondary Education Leisure Learning Academic interest	Orientation for school groups. Space for teaching elements of school visits and leisure learning courses. Workshop space for special interest courses. Space for consuming packed lunches Space for storing bags etc during school visits	Sufficient to accommodate one class and accompanying staff: maximum capacity 35 people.
Archive study room /library	Leisure learning Academic interest	Resources for studying collection in detail. Small study group area for leisure learning or academic courses. Specialist storage area for collections with correct conservation standards.	Sufficient to accommodate small study group and supervisory staff, say maximum of 12.

The throughputs in these areas can be controlled by the Centre management and will depend on the levels of activity achieved in these areas. They are a fundamental element of the proposal to make the Living History Centre the community hub.

In addition to the above suitable parking, toilet facilities and staff office and “back of house” space must be considered

10. FINANCIAL PROJECTIONS

10.1 INTRODUCTION AND KEY ASSUMPTIONS

The purpose of this Section is to project the indicative performance of the BPHT for the first five years of operation. Detailed assumptions are presented in Apendix I.

Key assumptions to the operating projections are presented below:

- Completion of the development to the standards and with the facilities described in this plan.
- Effective leadership, management, branding and marketing of BPHT.
- Uninterrupted trading, with the timescale for development as set out in this plan.
- That there are no changes in the market conditions for this project other than those assumed in the projections.
- Inflation at 2.5% per year
- The Trust is not registered for VAT but the trading company is – all figures are shown net of VAT.

10.2 INCOME AND EXPENDITURE PROJECTIONS – CORE ATTRACTION

BATTLEFIELD OF PRESTONPANS HERITAGE TRUST PROJECTED INCOME AND EXPENDITURE ACCOUNT

	Year 1	Year 2	Year 3	Year 4	Year 5
INCOME					
Admissions	£505,891	£457,791	£479,392	£503,157	£528,366
Retail	£202,443	£187,107	£195,876	£205,058	£214,783
Catering	£193,570	£178,083	£186,531	£195,381	£204,760
Miscellaneous	£0	£0	£0	£0	£0
Total Trading	£901,904	£822,981	£861,800	£903,596	£947,908
COST OF SALES					
Retail Cost of Sales	£102,592	£94,384	£98,862	£103,552	£108,523
Catering Cost of Sales	£60,733	£56,132	£58,763	£61,517	£64,435
School Visit Costs	£397	£349	£353	£357	£362
Events/living history	£0	£0	£0	£0	£0
Total Direct Expenditure	£163,722	£150,865	£157,978	£165,427	£173,319
OTHER EXPENSES					
Payroll, Taxes and Benefits	£313,190	£307,273	£314,955	£322,829	£330,900
Operating Expenses	£163,722	£150,865	£157,978	£165,427	£173,319
Marketing	£40,927	£41,950	£42,999	£44,074	£45,176
Administration	£40,498	£40,221	£41,409	£42,646	£43,930
Building Costs	£88,253	£90,459	£92,720	£95,038	£97,414
Total Costs	£646,589	£630,768	£650,061	£670,014	£690,738
SURPLUS BEFORE CONTRIBUTIONS	£91,593	£41,347	£53,761	£68,155	£83,851
Depreciation					
Grant Amortisation					
Covenantable Profit	£91,593	£41,347	£53,761	£68,155	£83,851

Source: RGA

Projections are presented for the “core” visitor attraction only – until such time as the possible scale of other facilities (archive, study, and performance areas) are known it is not reasonable to indicate income flows. We expect that leisure learning would provide a positive income stream to the Trust.

10.3 CASH FLOW PROJECTIONS

[To be completed when capital cost plan is known.]

10.4 SENSITIVITY ANALYSIS

The financial projections are based on a number of assumptions related to market growth, penetration rates and pricing. The impact of varying some key assumptions has been tested in this Section.

10.4.1 Failure to Achieve Penetration Rates

The BPHT is projected to achieve a “stable year” surplus, the impact of reducing visitor penetration rates (at all business units) by 5% and 10% is presented in the Table below.

Table 10.4.1: Impact of reducing penetration rates

Scenario	Year 1	Year 2	Year 3	Year 4	Year 5
BPHT Base Projections	£91,593	£41,347	£53,761	£68,155	£83,851
Reduction in penetration rates by 5%	£63,641	£16,030	£27,242	£40,321	£54,622
Reduction in penetration rates by 10%	£35,688	-£9,287	£723	£12,487	£25,393

Source: RGA

If projected penetration rates in all business areas are short by 10%, the attraction will incur a small operating deficit in year two. This reflects the importance of generating high volumes of “destination” retail and catering visits, and underlines the centrality of maintaining this market to achieving sustainable performance. The key aspect for the project is to achieve a top quartile status as an attraction.

10.4.2 Pricing Reductions

The impact of reducing ticket prices and achieved catering and retail spends by 5% and 10% is shown in the Table below.

Table 10.4.2: Impact of reducing visitor spend

Scenario	Year 1	Year 2	Year 3	Year 4	Year 5
BPHT Base Projections	£91,593	£41,347	£53,761	£68,155	£83,851
Reduction in all spends by 5%	£63,281	£15,661	£26,865	£39,934	£54,225
Reduction in all spends by 10%	£34,969	-£10,024	-£32	£11,713	£24,599

Source: RGA

A reduction of visitor spend by 10% results in small operating deficits for the project in years two and three.

10.4.3 Increased HR costs

The impact of increasing HR costs by 5% and 10% is illustrated in Table 10.4.3.

Table 10.4.3: Impact of increasing HR costs

Scenario	Year 1	Year 2	Year 3	Year 4	Year 5
BPHT Projections	£91,593	£41,347	£53,761	£68,155	£83,851
Reduction in all spends by 5%	£75,933	£25,984	£38,014	£52,014	£67,306
Reduction in all spends by 10%	£60,274	£10,620	£22,266	£35,872	£50,761

Source: RGA

The project is robust against both of these scenarios.

10.4.4 Increased Cost of Sales

The impact of increasing the operating cost of sales by 5% and 10% is presented below; the results are not particularly sensitive to increased cost of sales.

Table 10.4.4: Impact of increasing cost of sales

Scenario	Year 1	Year 2	Year 3	Year 4	Year 5
BPHT Projections	£91,593	£41,347	£53,761	£68,155	£83,851
Reduction in all spends by 5%	£75,221	£26,261	£37,963	£51,612	£66,519
Reduction in all spends by 10%	£58,848	£11,174	£22,166	£35,070	£49,187

Source: RGA

10.4.5 Conclusions

The BPHT project appears to be a reasonably robust operating model.

The breakeven income and expenditure position for the BPHT is estimated to be at around 12% lower visitor numbers or expenditure, reflecting the importance of achieving the marketing targets set out in this document – essentially a top quartile status as a visitor attraction.

11 THE DEVELOPMENT OF THE BROADER DESTINATION

The Trust's remit for developing the Living History Centre at Prestongrange is for the potential leverage of the attraction, based on visitors to the Heritage Museum including a visit to the Centre also. Furthermore, it may allow for an inclusive destination to be built which combines several areas of Prestonpans' industrial heritage (mining, coal, glass, brick). The potential for this to occur is dependent on East Lothian Council's commitment to the redevelopment of Prestongrange. Currently, the Museum is in need of upgrading and attracts less than 9,000 visitors per year. If the Museum and other elements are redeveloped to an appropriate and higher standard, there is potential for a larger increase in visitor numbers to the Museum, which would in turn, attract a large proportion to the Living History Centre. Conversely, visitors to the Centre may also wish to include a visit to the Museum or other elements.

The visitor number assumptions made are based on the development of an inclusive destination at Prestongrange, which consists of a redeveloped and upgraded Heritage Museum and other elements, alongside the Trust's proposed Living History Centre being built with all the components highlighted in Section 8.5.

In this section, we make additions to our visitor assumptions for the Battlefield Centre, presented in Section 9, based on an increase in penetration rates for the local market (defined as the 0-30 minutes drive time). We feel this is the catchment which is most likely to be attracted to the Museum and other attractions – and that the appeal to broader geography will be less strong than for The Battlefield Centre.

It is our opinion that the subject of the Jacobites and Bonnie Prince Charlie will have strong enough appeal to the broader 30-90 minutes drive time and overseas markets.

Furthermore, the local market is more likely to undertake repeat visits to the Centre and the broader destination. This would be supported by "activisation" of the destination with events, promotions and joint ticketing approaches. This will require close co-operation and management.

If this is achieved we are of the opinion that an additional 20,000 visitors can be attracted to the Prestongrange Visitor Destination above the levels attracted to the Heritage Museum currently. The total effect of the Battlefield Centre and Destination could be to achieve about 110,000 visitors annually.

12 ACTION PLAN

12.1 TOWARDS A DEVELOPMENT – THE DIRECTION

It is our view that the key question posed to us by the Trust, as to whether there is potential for a sustainable core visitor attraction at Prestonpans, based upon the Battle, has been answered in the affirmative.

There is potential for an attraction as the core of certain other elements that will satisfy the objectives of the Trust for this to be a regeneration project for the town. However there are a number of unknowns which must be resolved before the large scale "vision" can be attained. These steps are indicated below.

Meanwhile the Trust should not stand still – the momentum gained should be maintained. We suggest, for example, that the small scale interpretation of the Battlefield and a programme of suitable events should continue. They will prove the potential of the destination and surprise the visitors.

Talks and activities should be encouraged with potential partners such as Queen Margaret College University, East Lothian Council and Historic Scotland.

12.2 OUTLINE TIMEFRAME

	Action	**Started**	**Completed**	**Time Allocated**
1	To consider the findings of this report, discuss as appropriate	September 2010	October 2010	4 weeks
2	To adopt the Vision and strategy	September 2010	October 2010	4 weeks
3	To continue talks with East Lothian Council regarding working together at the Heritage Museum	September 2010	ongoing	ongoing
4	Work with East Lothian Council and developers to improve interpretation of Riggonhead Defile at Blindwells	ongoing	ongoing	ongoing
5	Refine business plan	October 2010	ongoing	ongoing
6	File "marker" bids with potential funding partners	October 2010	December 2010	12 weeks
7	Appoint a design team	January 2011	February 2011	8 weeks

	Action	Started	Completed	Time Allocated
8	Outline design concept – building and structures	March 2011	May 2011	12 weeks
9	Prepare budget cost plan	June 2011	June 2011	4 weeks
10.	Make funding applications	July 2011	January 2012	28 weeks
11	To submit a planning application for the project	February 2012	March 2012	8 weeks
12	To obtain Building Regulations Approval for the building.	April 2012	May 2012	8 weeks
13	To mobilise constructors and begin building work	June 2012	December 2012	26 weeks
14	To finalise business planning and commence pre-opening marketing (including web activity)	November 2012	ongoing	ongoing
15	To fit-out and equip building	January 2013	April 2013	16 weeks
16	To appoint key staff	January 2013	April 2013	16 weeks
17	Venue Opens	May 2013		

APPENDIX A. DETAILED MARKET OVERVIEW

A.1 INTRODUCTION

There are many different possibilities for the proposed development at Prestonpans and the "community" engaged with each will therefore vary. Some of the components will be significant on a regional, national or even international level while others will be more localised. RGA has examined the characteristics of the potential communities by commissioning an Acorn profile of the market area at drive times of 30, 60 and 90 minutes from the project site. The isochrones were selected based upon the "normal" catchments for various scales of UK visitor attractions. Economic and tourism indicators have been provided for the Prestonpans and East Lothian region where appropriate. It is hoped that this approach retains the focus on the Prestonpans area as the location of the project but recognises that some of the engaged communities will come from outside the immediate boundary.

A.2 POPULATION

The characteristics of the market population have been profiled using Acorn, a geodemographic profiling tool developed by CACI that classifies all members of the population based on where they live. The system uses data from the 2001 Census and combines it with extensive consumer lifestyle databases, which cover all of the UK. The entire population is then grouped into 5 categories, 17 groups and 56 types.

The Acorn profile of the population living within a 30, 60 and 90-minutes drive of the project site is presented in Table A.1. It should be taken into consideration that the Acorn profile used is for 2004, therefore they are not entirely reflective of the current population.

Table A.1: Acorn Profile, 30, 60 and 90-minutes drive of the project site 2004

Acorn Category	30-minutes drive	60-minutes drive	90-minutes drive
1. Wealthy Achievers	42,148	145,392	362,113
2. Urban Prosperity	103,002	242,921	328,588
3. Comfortably Off	49,835	141,570	397,201
4. Moderate Means	27,361	86,534	224,274
5. Hard Pressed	106,129	255,530	866,114
Unclassified	3,549	9,677	20,956
Total	**332,024**	**881,624**	**2,199,246**

Source: CACI/RGA

The figure underpins a relatively good location for the project site. Within the 30-minutes drive time there is a population of over 332,000, increasing to 881,624 within an hour's drive and 2.1 million within a 90-minutes drive time. There is an opportunity to engage a significant proportion of the Scottish population.

All three drive times are characterised by high percentages of the population falling into the "Hard Pressed" category at 32%, 29% and 39% in each of the 30, 60 and 90-minutes drive times respectively. This is significantly higher than the Great Britain average of 22%.

This category contains the poorest areas of the UK. Unemployment is well above the national average. Levels of qualifications are low and those in work are likely to be employed in unskilled occupations. Household incomes are low and there are high levels of long-term illness in some areas.

Housing is a mix of low-rise estates, with terraced or semi-detached houses, and purpose-built flats, including high-rise blocks. Properties tend to be small and there is much overcrowding. Over 50% of the housing is rented from the local council or housing association.

There is a large number of single adult households, including many single pensioners and lone parents. In some neighbourhoods, there are high numbers of black and Asian residents.

These people are experiencing the most difficult social and economic conditions in the whole country and appear to have limited opportunity to improve their circumstances.

The social, community and regeneration objectives of the project will therefore have the potential to impact on the most vulnerable social groups. This is likely to be attractive to the project team and wider stakeholders. The potential impact of the project in these terms is, in our view, highly significant.

The second most significant group in the areas is "Urban Prosperity", which accounts for 103,002 individuals (31% of the population) in the 30-minutes drivetime, 242,921 individuals (28% of the population) in the 60-minutes drivetime and 328,588 (15% of the population). In all three cases this is an over-representation of Urban Prosperity compared with a national average of 11%. Acorn describes this category as follows:

These are well educated and mostly prosperous people living in the UK's major towns and cities. They include both wealthy older people living in the most exclusive parts of London and other cities, and highly educated younger professionals moving up the corporate ladder. This category also includes some well educated but less affluent individuals, such as students or graduates in their first jobs. The wealthier people tend to be in senior managerial or professional careers, and often live in terraced or detached houses with four or more bedrooms. Some of the younger professionals may be buying or renting flats. The less affluent will be privately renting.

These people have a cosmopolitan outlook and enjoy their urban lifestyle. They like to eat out in restaurants, go to the theatre and cinema and make the most of the culture and nightlife of the big city.

The high proportion of such individuals within the market area is positive in that they have a high propensity to undertake leisure activities and therefore can make a positive contribution to the financial sustainability of the project.

Acorn projections for the drivetime populations by 2010 are

Table A.2: Projected population growth, 2004-2010

0-30 minutes drivetime	**0-60 minutes drivetime**	**0-90 minutes drivetime**
2.11%	1.97%	0.56%

Source: CACI/RGA

The projections indicate very slight growth to 2010 of approximately 0.35% per year in the 0-30-minutes drivetime and 0.33% in the 60-minutes drive time and 0.09% in the 90-minutes drive time.

A.3 THE LOCAL ECONOMY

The site falls within the Local Authority area of East Lothian. Analysis of the statistics for the immediate Local Authority will detail the potential growth of the market area over the coming years.

Approximately 77% of East Lothian residents are in employment, slightly higher than the Scottish figure of 74%. This figure is 2% lower than in the previous study on account of the economic recession. The claimant count unemployment rate of 3.8% is lower than the national average of 4.8%. The wards with the highest rates of unemployment are Prestonpans (West) (9.6%), Tranent (North) (6.6%), Prestonpans (East) (5.9%), Carberry (5.7%) and Musselburgh (East) (5.7%). The rate of unemployment in Prestonpans (West) is twice the national average of 4.8%.

Table A.3 shows the 2009 mid- level population statistics for East Lothian and Scotland.

Table A.3: East Lothian population by age, 2009

	East Lothian		**Scotland**	
	No. (000)	%	**No. (000)**	**%**
Below working age	19	19%	912	17%
Of working age	58	60%	3,249	63%
Above working age	20	21%	1,033	20%
Total population	**97**	**100%**	**5,095**	**100%**

Source: Scottish Government/RGA

The Scottish Government provides population projections up to 2033 (Table A.4). These indicate that the market area will experience a huge population increase by 2033 to almost a third of current levels (32%), whereas Scotland will stay static and will only experience an increase of 7%. Moreover, East Lothian will see a higher than average increase in all levels of the population, including those below working age, whereas in Scotland this age group is expected to decline.

There are concerns that the present trends of rapid population growth among working age adults are not sustainable with current employment levels. There are also high levels of commuting out of East Lothian for employment meaning that there is low daytime population which reduces the vibrancy of town centres and contributes to high levels of retail and service expenditure leakage.

Table A.4: Population Projections of East Lothian 2009-2033

	East Lothian	**Scotland**
	% Change 2009-2033	**% Change 2009-2033**
Below working age	37%	-1%
Of working age	31%	4%
Above working age	32%	22%
Total Population	**32%**	**7%**

Source: Scottish Government/RGA

Table A.5: Economic activity/inactivity & Employment, January 2009 – December 2009

	East Lothian		**Scotland**	
All people:	**No. (000)**	**%**	**No. (000)**	**%**
Economically active	49	80%	2,677	80%
-males	25	81%	1,407	83%
-females	25	80%	1,270	76%
In employment	47	77%	2,490	74%
Employees	41	88%	2,209	89%
Self employed	5	11%	265	11%
Unemployed	2.4	5%	177.5	7%

Source: Scottish Government/RGA

Economic activity and unemployment rates in East Lothian are broadly in line with the figures for Scotland as a whole, however, the percentage of unemployed is slightly lower indicating a stronger market.

Table A.6: Average Earnings in East Lothian

	East Lothian	**Scotland**	**% difference from Scotland**
Gross Average* Weekly Pay			
Male full time workers	£497.10	£510.20	-2.6%
Female full time workers	£473.70	£419.90	12.8%
Gross Average* Weekly Earnings	£484.40	£472.20	2.6%

Source: Scottish Government/RGA
* Median

Gross average weekly earnings in East Lothian are 2.6% higher than the average in Scotland. There are significant differences by gender, with men in East Lothian earning less per week than average (-2.6%) and women earning substantially more per week (12.8%). This may reflect the comparatively high levels of employment in the services sectors (see Table A.7), which tend to pay higher wages than many production and construction sector jobs.

Table A.7: Number and proportion of Employee jobs by industry, 2008

	East Lothian		Scotland	
	No. (000)	**%**	**No. (000)**	**%**
Agriculture, forestry & fishing	1	4%	36.5	2%
Production & Construction	**5.2**	**18%**	**407.4**	**17%**
-Mining & Energy	-	-	57.3	2%
-Manufacturing	2	7%	199	8%
-Construction	-	-	151.1	6%
Services	**22.1**	**78%**	**1,976.6**	**82%**
-Retail, wholesale & hospitality	6	21%	535.2	22%
-Transport & communications	1.1	4%	162	7%
-Finance and business activities	5	18%	444.9	18%
Other services	10.1	36%	834.4	34%

Source: Scottish Government/RGA

Table A.8 Scottish Employment and Enterprises by Size of Enterprise, March 2009

	East Lothian		Scotland
	No. (000s)	**%**	**%**
Small	2,600	93%	96%
Medium	70	3%	2%
Large	140	5%	2%
Total	**2,800**	**100%**	**100%**

Source: Scottish Executive/RGA

Compared with Scotland, there are fewer small businesses, the same proportion of medium businesses and a larger proportion of large businesses in East Lothian. This shows strong economic conditions in the area and is encouraging for the project, as larger businesses may translate to more business travellers in the region. A reliance on large businesses does however imply dependency within the region on a small number of significant employers. This could pose a threat if one of them closes or relocates.

A.4 TRANSPORT

Road

Prestonpans is well connected to Edinburgh, Glasgow and other major cities in the UK through its location off the A1 route which forms part of the corridor connecting the North East of England to Scotland.

Air
Edinburgh Airport is 14 miles from Prestonpans and experiences 24,600 passengers per day. It continues to expand and is currently working to a 2006 masterplan, which is due to be updated in 2011. Relevant developments include:

- Edinburgh Airport is recognised as Scotland's fastest growing airport and in 2009, it handled over 9 million passengers;, which was almost two million more than Glasgow Airport;

- Edinburgh Airport offers over 40 airlines with an average of 311 flights per day. Between 2004 and 2009, the airport experienced a 13.1% growth in terminal passengers;

- There are a number of plans to develop the airport, with a predicted £240 being spent on redevelopments in the next ten years. The terminal building is currently undergoing an extension to expand the departures lounge to twice its size.

Rail
- Prestonpans is served by a train on the Edinburgh to North Berwick line. Edinburgh Waverly is the closest major station to Prestonpans and serves over 14 million people each year. The journey to Edinburgh is approximately ten minutes. There are no new development plans intended for the station at this present moment.

Sea
- Superfast Ferries continues to operate the 'every other day' sailings from Rosyth to Zeebrugge, Belgium, however in August 2010, it was confirmed that this service is due to stop as of December 2010.

- Leith (Edinburgh's historic port) continues to develop its cruise ship arrivals.

A.5 TOURISM

Edinburgh and the Lothians
Published statistics from VisitScotland present data for Edinburgh and the Lothians combined. It is important to note that the inclusion of the Edinburgh statistics may affect overall figures and the Edinburgh tourism product is very different to that offered in the surrounding Lothians. The figures presented below must thus be taken as a general indicator.

Tourism is a key sector for Edinburgh and the Lothians; recent results show some 3.8 million tourist trips were taken in the region in 2009, contributing around £1,020 million annually to the local economy and 6.3% of all jobs in East Lothian. Table A.11 highlights some of the key statistics for tourism in Edinburgh and the Lothians, compared to Scotland as a whole.

Table A.10: Volume and Value of Tourism in Edinburgh & Lothians and Scotland in 2005

	Edinburgh & Lothians	Scotland
Total number of Trips (m)	3.79	15.03
Total Number of Bed Nights (m)	14.04	67.99
Expenditure (m)	£1,020	£4,095

Source: VistScotland

Table A.11: Domestic Tourism to Edinburgh & Lothians and Scotland

	Trips (millions)		Bed nights (millions)		Expenditure (£m)	
	Edinburgh & Lothians	Scotland	Edinburgh & Lothians	Scotland	Edinburgh & Lothians	Scotland
2009	2.46	12.47	6.6	46.08	£562	£2,736

Source: VisitScotland/RGA Research

In 2009, domestic tourists to Edinburgh and the Lothians represented 65% of all trips taken to the area. This is a lower percentage than recent years, however, this is in no doubt due to the year-long “*Homecoming* Scotland” event, which attracted a large number of overseas tourists to the region in 2009. Domestic visitors spent an average of 2.7 nights in the area, , which is below the Scottish average of 3.7.

Table A.12: Overseas Tourism to Edinburgh & Lothians and Scotland

	Trips (millions)		Bed nights (millions)		Expenditure (£m)	
	Edinburgh & Lothians	Scotland	Edinburgh & Lothians	Scotland	Edinburgh & Lothians	Scotland
2009	1.33	2.56	7.44	21.91	£458	£1,359

Source: VisitScotland/RGA Research

During 2009, over 1.3 million overseas tourism trips were made to Edinburgh, which accounts for over half of all overseas visitors to Scotland. Overseas visitors generated £458 million for the local economy in 2009. Overseas visitors to the region make fewer trips to the area, but stay longer and spend on average more per trip.

Table A.13: Country of Residence of Visitors to Edinburgh & Lothians (2009)

	Trips (%)		Expenditure (%)	
	Edinburgh & Lothians	**Scotland**	**Edinburgh & Lothians**	**Scotland**
England	63%	48%	73%	59%
Scotland	31%	47%	17%	32%
Northern Ireland	4%	3%	7%	7%
Wales	2%	2%	4%	2%
Total UK (m)	**2.46**	**12.46**	**£562**	**£2,736**
USA	17%	14%	19%	17%
Germany	11%	9%	11%	10%
Irish Republic	10%	8%	9%	5%
France	8%	11%	6%	7%
Italy	7%	4%	7%	4%
Spain	7%	7%	6%	6%
Australia	5%	4%	4%	5%
Netherlands	5%	6%	4%	4%
Canada	4%	4%	3%	4%
Rest of the World	28%	33%	30%	38%
Total Overseas (m)	**1.33**	**2.54**	**£458**	**£1,369**

Source: VisitScotland/RGA Research

The majority (63%) of UK trips to Edinburgh and the Lothians were taken by English residents; 31% were taken by Scottish. National figures show a far more even distribution between the two countries. English visitors accounted for 73% of the tourist expenditure by UK residents, whilst Scottish residents accounted for only 17%. Edinburgh and the Lothians is a more popular destination amongst English visitors than Scotland as a whole. This is most likely a reflection of its proximity to England.

Visitors from the USA accounted for the largest percentage of trips to Edinburgh and Lothians (17%) and by far were the visitors that accounted for the most expenditure (19%).

Table A.14: Main Purpose of Trip to Edinburgh & Lothians (2009)

	Domestic Visitors		Overseas Visitors	
Reason	**Edinburgh & Lothians**	**Scotland**	**Edinburgh & Lothians**	**Scotland**
Holiday	70%	71%	58%	47%
Visiting friends and relatives (non-holiday)	10%	11%	23%	30%
Business / Conference	21%	16%	12%	17%
Other	1%	2%	6%	6%

Source: VisitScotland/RGA Research

Edinburgh and the Lothians is widely perceived as a holiday destination with the majority of both domestic and overseas visitors (70% and 58% respectively) visiting the region for holiday purposes. This is followed by business/conference visits for domestic tourists and visiting friends and relatives for overseas visitors. These trends are in line with figures for Scotland as a whole. However, it is estimated that the business and conference market is heavily skewed by business to Edinburgh, rather than the outlying regions.

Table A.15 shows that almost three quarters of domestic trips to Edinburgh and the Lothians tend to be for one to three nights. This is in line with national figures, although there appears to be a stronger pattern for shorter trips to the area than Scotland (average 2.5 nights compared to 3.6). Overseas tourists tend to stay in the region longer. This figure is lower than the figure for Scotland as a whole, which is explained by the fact that many overseas visitors stay in the region as part of a longer stay in the country.

Table A.15: Duration of Trip (2009)

	UK Tourist Trips		**Overseas Trips**	
	Edinburgh & Lothians	**Scotland**	**Edinburgh & Lothians**	**Scotland**
1 to 3 nights	74%	65%	-	-
4 to 7 nights	20%	27%	-	-
8+ nights	6%	8%	-	-
Average length of stay (nights)	2.7	3.7	5.6	8.6

Source: VisitScotland/RGA Research

Table A.16: Type of Accommodation Used (2009)

	UK Nights (%)		Overseas Nights (%)	
	Edinburgh & Lothians	**Scotland**	**Edinburgh & Lothians**	**Scotland**
Hotel/Guesthouse	36%	38%	31%	42%
Friends/Relatives	35%	31%	32%	30%
Camping/Caravanning	9%	12%	2%	2%
Self-Catering	6%	7%	15%	5%
Bed & Breakfast	4%	6%	7%	10%
Other	9%	7%	13%	11%

Source: VisitScotland/RGA Research

The most popular type of accommodation amongst visitors to the area from the UK is hotel/guest house (36%), followed by staying with friends/relatives (35%). For overseas visitors, staying with friends/relatives is the most popular form across the board (32%), while staying at a hotel/guest house falls below the national average (31% compared to 42% for Scotland as a whole). Furthermore, stays at self catering accommodation accounted for 15% of trips, which is three times the national average of 5%.

Table A.17: Time of Trip (2009)

	UK Tourist Trips (%)		Overseas Trips (%)	
	Edinburgh & Lothians	**Scotland**	**Edinburgh & Lothians**	**Scotland**
January – March	21%	17%	17%	17%
April – June	25%	28%	26%	27%
July – September	30%	35%	40%	37%
October - December	24%	20%	17%	19%

Source: VisitScotland/RGA Research

Compared with the Scottish averages, domestic trips to Edinburgh and the Lothians are less seasonal, with a more even spread of trips taken throughout the year. Overseas visitors however, show more seasonality when visiting the area, which is more in line with national figures.

Table A.19: Tourism Related Employment in East Lothian and Scotland (2006-2007)

	2006	2007	% of all Employment 2007
East Lothian	2,900	2,800	6.3
All Scotland	206,700	208,800	8.6

Source: VisitScotland/RGA Research

Table A.19 shows that tourism accounted for 6.3% of employment in East Lothian, compared to the national average of 8.6%. Between 2006 and 2007, the figures for East Lothian showed a decrease, whereas in Scotland they showed an increase. This possibly reflects a decrease in the tourism product in the region, compared to a national increase.

The top ten visitor attractions within Edinburgh and the Lothians are detailed in Table A.21. Map A.1 identifies their locations.

Table A.20: Top 10 Visitor Attractions in Edinburgh & Lothians

Name	**2008**	**2009**	**% Change**	**Free / Paid**	**Map Ref.**
Edinburgh Castle	1,128,394	1,196,481	6%	P	1
National Gallery of Scotland	842,958	890,361	4.9%	F	1
St Giles' Cathedral	536,747	653,864	21.8%	F	1
Edinburgh Zoo	661,946	636,867	-3.8%	P	4
National Museum of Scotland	614,894	589,621	-4.1%	F	1
Edinburgh Bus Tours	517,793	531,352	2.6%	P	1
National War Museum	474,133*	494,213*	4.2%	F	1
John Muir Country Park	420,000*	435,000*	3.6%	F	8
Our Dynamic Park	298,288	298,287	0%	P	9
Scottish Seabird Centre	279,166	291,474	4.4%	P	10

Source: 2009 Visitor Attraction Monitor/RGA Research
*Estimate

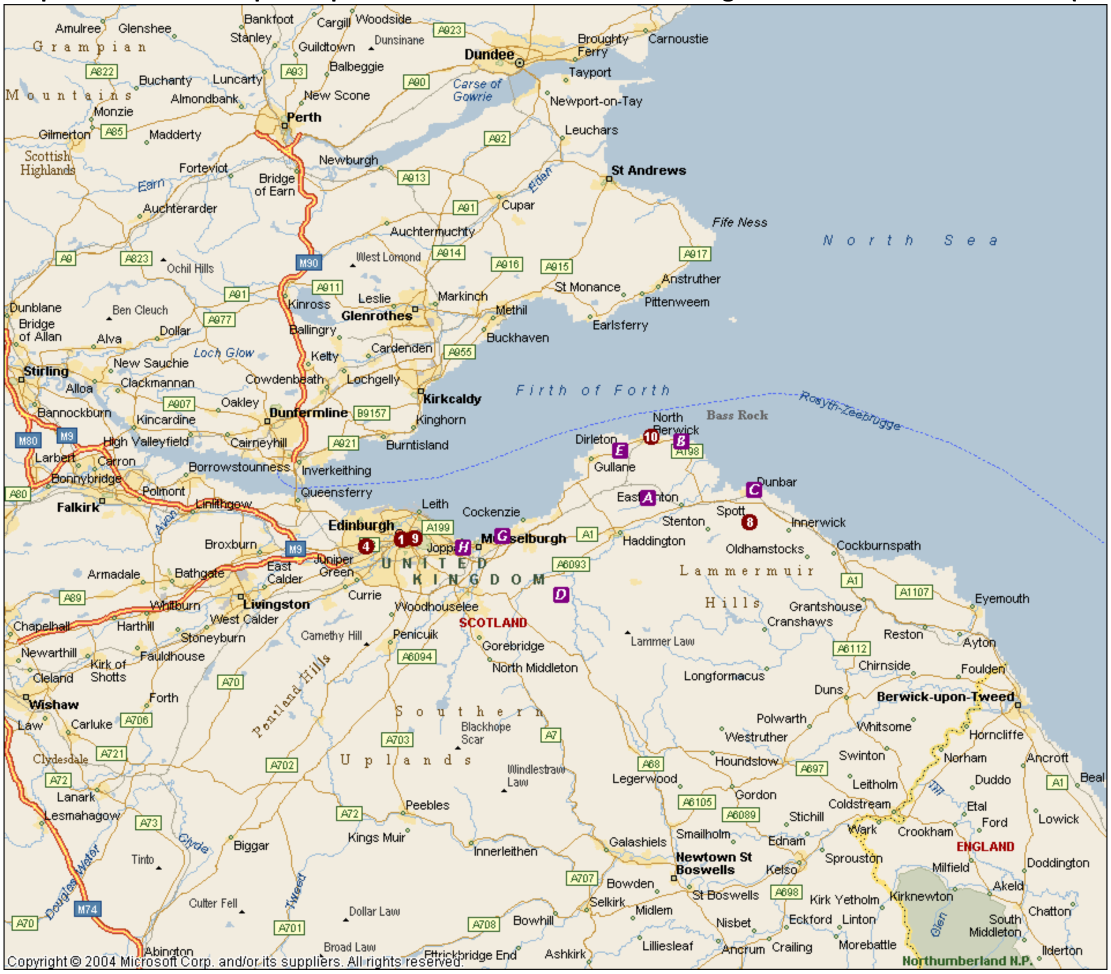
The nearby city of Edinburgh has a large number of visitor attractions, and is an extremely popular city with domestic and international visitors. Only two of the attractions in Table A.21 above are in East Lothian. However, RGA recognise that there are also a number of key tourist attractions in East Lothian. The most popular of these are outlined in Table A.22 and pinpointed in Map A.1.

Table A.21 Top 10 Visitor Attractions in East Lothian

Name	2008	2009	% Change	Free / Paid	Map Ref.
John Muir Country Park	420,000*	435,000*	3.6%	F	8
Scottish Seabird Centre	279,166	291,474	4.4%	P	10
Museum of Flight	70,331*	82,002	16.6%	P	A
Tantallon Castle	27,586	30,819	11.7%	P	B
John Muir Birthplace	10,621	29,439	177.2%	F	C
Glenkinchie Distillery	23,559	23,634	0.3%	P	D
Direlton Castle	19,794	23,344	17.9%	P	E
Dunbar Townhouse Museum	3,868	8,683	124.5%	F	C
Prestoungrange Industrial Heritage Museum	6,924	8,246	19.1%	F	G
Newhailes	6,115	5,676	-7.2%	P	H

Source: 2009 Visitor Attraction Monitor/RGA Research

Map A.1: Location Map of Top Visitor Attractions within Edinburgh & Lothians and East Lothian (2009)



Source: Microsoft Autoroute/ RGA Research

Roughly half of the top ten visitor attractions in East Lothian are paid entry historic buildings and museums. All but one of the attractions experienced an increase in numbers in 2009, which is positive. John Muir Birthplace showed the largest increase, of 177.2% between 2008 and 2009. Prestoungrange Industrial Heritage Museum showed a 19.1% increase between 2008 and 2009; an encouraging sign for this project.

As shown in Map A.1, the top attractions in East Lothian are widely dispersed, with a trend to be located near the coast. Again, this is encouraging for the project site.

Greater Market Area

Table A.22 provides total UK trips to all regions within the market area and the main purpose of the visit.

Table A.22 Total UK Tourism by Market Area (2009)

	Total Trips (million)	Holiday (%)	Visiting Friends and relatives (%)	Business (%)	Other (%)
Edinburgh and Lothians	2.46	70	10	21	1
Fife	0.54	68	18	11	3
Greater Glasgow and Clyde Valley	2.13	56	18	24	2
Perthshire	0.74	73	11	12	4
Scottish Borders	0.34	73	13	7	2

Source: VisitScotland/ RGA Research

Table A.23 provides total overseas trips to the market area.

Table A.23 Total Overseas Tourism by Market Area (2009)

	Total Trips (million)	Holiday (%)	Visiting Friends and relatives (%)	Business (%)	Other (%)
Edinburgh and Lothians	1.33	58	23	12	6
Fife	0.13	44	38	14	3
Greater Glasgow and Clyde Valley	0.78	42	32	20	7
Perthshire	0.13	70	25	3	2
Scottish Borders	0.04	49	46	5	-

Source: VisitScotland/ RGA Research

For both the domestic and overseas markets, Edinburgh and Lothians represents the largest region for total visitors attracting 2.46m and 1.33m visitors respectively, followed by Greater Glasgow and Clyde Valley.

Holiday makers consistently make up the majority of visitors whilst the other categories fluctuate between VFR and business travellers. For the purpose of our model we have excluded business and conference visitors as they are generally unlikely to undertake tourism activities.

A.6 STUDENT POPULATION

The student population in the market area has been calculated taking account of the total student population for the local authorities within the 90-minutes market area of Prestonpans. We have assumed that all schools within these local authorities would be willing to travel to the attraction if it provided a suitable fit within the national curriculum. Table A.23 shows all students in publicly funded schools.

Table A.24: Pupils in Publicly Funded Schools

Local Authority	Primary	Secondary	Total
East Lothian	7,557	5,866	13,423
Edinburgh	25,088	19,689	44,777
West Lothian	14,692	10,937	25,629
Midlothian	6,494	5,464	11,958
Fife	27,196	22,051	49,247
Glasgow	38,583	28,189	66,772
Perth and Kinross	10,209	7,941	18,150
Scottish Borders	8,520	6,958	15,478
Stirling	6,870	6,037	12,907
South Lanarkshire	24,176	20,033	44,209
North Lanarkshire	27,252	21,829	49,081
Total	196,637	154,994	351,631

Source: Scottish Executive Scottish Pupils Stats 1998 – 2006

Table A.25 shows the number of students attending independent schools in the market area. The data available only provides the total and is not broken down into primary and secondary. Edinburgh in particular contains a significant number of students attending independent schools relative to its population.

Table A.25: Pupils in Independent Schools

Local Authority	Pupils	% of Population
East Lothian	753	5.3%
Edinburgh	10,801	18.9%
West Lothian	44	0.2%
Fife	539	1.1%
Glasgow	6,519	8.5%
Perth and Kinross	2,163	10.5%
Scottish Borders	181	1.2%
Stirling	638	4.7%
South Lanarkshire	1,043	2.3%
North Lanarkshire	30	0.1%
Total	**22,711**	

Source: Scottish Council of Independent Schools

A.7 NEW DEVELOPMENTS AND REGENERATION ACTIVITY

The majority of new developments in East Lothian are residential. Three of the largest developments occur close to the Prestonpans area. These are developments at Pinkie Mains, Blindwells (which includes the development of 1,600 homes) and at Lothian Mains.
Regarding tourism developments in the area, there are three more museums that the council are currently developing or redeveloping. The John Gray Centre in Haddington is currently under construction and is due to open in 2012. The Musselburgh Museum is also under development and will be open in early 2011. The North Berwick Museum is due to be renovated and reopened within the next few years, although there is no set date in place. There are plans by the council to redevelop Prestongrange, however, there remains no commitment to this yet.

Major regeneration projects planned for Edinburgh include:

- The Edinburgh Trams project is currently underway and has an intended finish date of 2012. The tram line will run from Edinburgh Airport to Newhaven. However, the project has undergone severe delays and it is unlikely to be completed by the intended date;

- There are plans to redevelop Tynecastle Stadium into a 'top class European stadium' including a new 10,000 seat main stand, a hotel, office space, restaurants and bars. A full planning application has been submitted but the proposal has been put on hold;

- A masterplan has been presented for the redevelopment of land at Haymarket to include a major office complex, cafés, shops and two new hotels;

- There were plans at Caltongate to create a major mixed-use regeneration project, however, this has been cancelled by the council;

- The Leith Waterfront includes 372 acres of brownfield land owned by Forth Ports. This area is set to make a huge contribution to the expansion of Edinburgh over the next 20 years. The development will include housing, retail space and leisure use including parkland;

- The Edinburgh Waterfront project is one of the biggest waterfront regeneration projects in Europe this will include up to 8,000 new houses, offices and other business uses that will make the area a major employment location. There will also be community centres including supermarkets and other retail and catering facilities;

- Planning permission was granted in January 2009 for redevelopment of the area of the Cowgate that was devastated by fire in 2002. The development will include a hotel linking Old Town's South Bridge to the Cowgate, a restaurant, a new festival venue, a business centre and a night club;

- Sighthill is to undergo major regeneration, in partnership with the local community, to create a mixed and sustainable neighbourhood including community facilities and public spaces with improved pedestrian links.

A.8. FINDINGS

A number of points can be made about the area:

- Each of the 30, 60 and 90-minutes drive times are characterized by a large percentage of population falling into the “Hard Pressed” category. The second most significant group in the areas is “Urban Propensity”. These are characterized by increased disposable income and a high propensity to undertake leisure activities which is positive for this project;

- East Lothian is projected to experience a huge increase of people of working age and above working age. There are concerns that the rapid population growth will not be sustainable with current employment levels. High levels of commuting out of the area for employment is also a concern as this leads to high levels of retail and service expenditure leakage;

- Employment levels in Prestonpans are poor and are twice the national average of 4.8%

- Prestonpans is in a good location near the A1 with easy access to Edinburgh by road or rail;

- The average number of bed nights in the area are lower than the national average, but spend per night is higher;

- The tourism industry in the Edinburgh and Lothians region is worth approximately £1,020 million per year to the local economy and plays an increasingly important role in the economic life of the region; 6.3% of all employment in the area is within the tourism sector, which is in line with Scottish national averages;

- Domestic tourism represents 64% of all trips taken to the area with English visitors representing the largest market segment;

- Visitors from the USA represent both the largest overseas market (17%) and contribute the most expenditure to the region (19%)

- Trips to Edinburgh and the Lothians are less seasonal than Scottish averages. However, overseas visitors showed more seasonality;

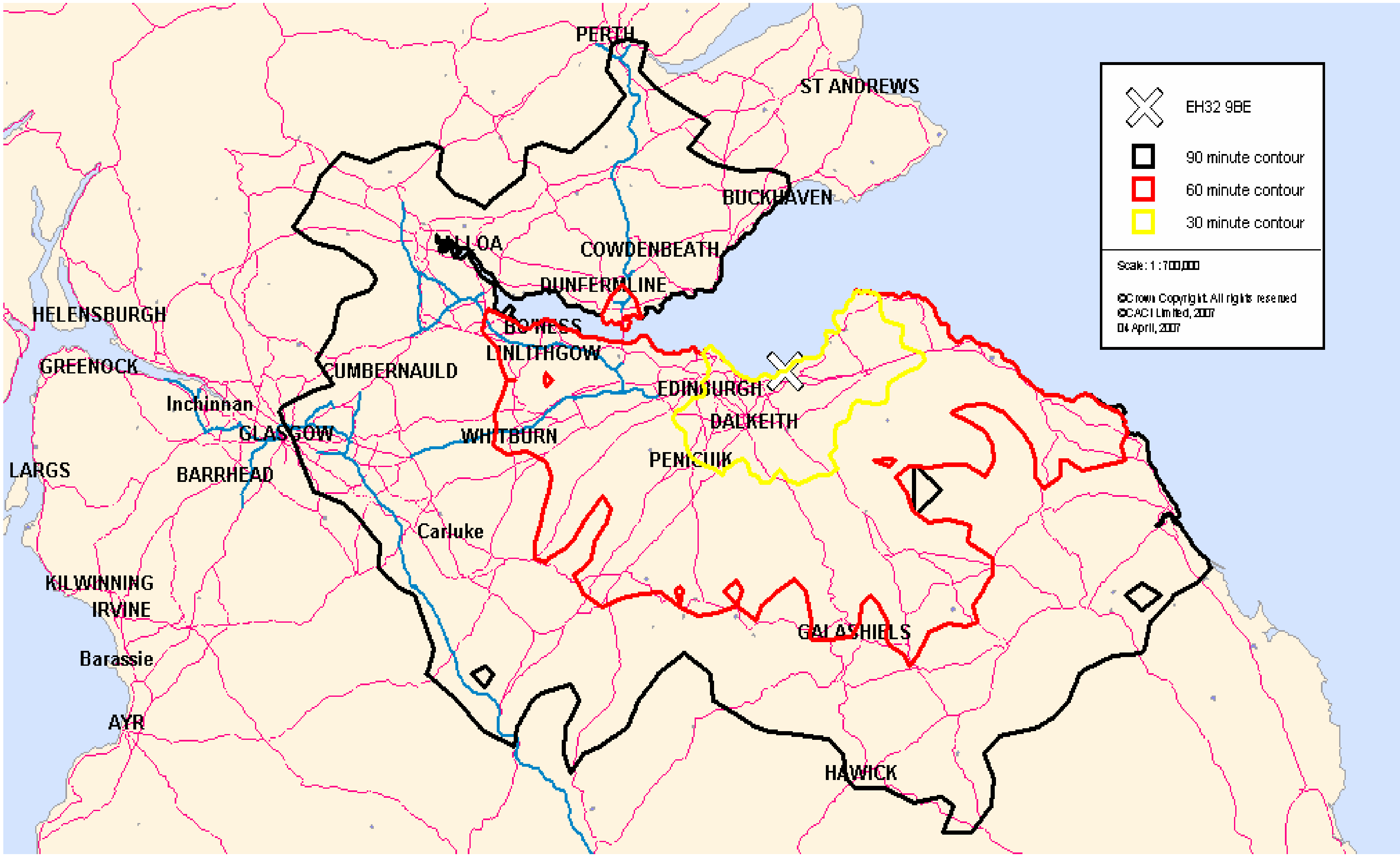
- Two of the top ten visitor attractions in the area are in East Lothian; John Muir Country Park and the Scottish Seabird Centre.

- There are three major new housing developments occurring around Prestonpans

A.9 CONCLUSIONS

This project has the potential to deliver positive economic, social and community impact on Prestonpans in particular as it generates increased jobs thereby decreasing unemployment.

APPENDIX B: ACORN PROFILE MAP



APPENDIX C: COMPARATOR REVIEW

C.1 INTRODUCTION

RGA have examined a number of comparator visitor attractions which provide a good 'fit' with the Prestonpans project. These include attractions that have a battlefield as their core theme and others that have a strong presence in East Lothian. Given the unique nature of what is being proposed at Prestonpans there is no 'ideal' model to follow, we have instead examined elements from a range of attractions to highlight best practice and strengths. We have considered attractions at the local and national level.

C.2 CULLODEN

The National Trust bought the site in 1982 at which time it consisted of a commercial forestry plantation. The visitor centre operates as a paid attraction, and is open daily with extended hours in the summer months.
A new visitor centre opened in December 2007 at a total cost of £9.8m. The target visitor numbers for the new centre is 105,000. The new visitor centre is designed for up to 250,000 visitors a year, housing interpretation of the battle along with educational/ conference facilities, a 240 cover café/ restaurant, a shop and staff/ ancillary accommodation.

Significant research has been undertaken by external specialists to ensure that the information presented is both accurate and objective telling the story of the Battle by both sides.

There are now a number of new experiences at the visitor centre. These include an interactive exhibition, a 360-degree battle immersion film and a rooftop viewing area of the battlefield. The battlefield has been restored to its appearance during the time of the battle and handheld portable guides are available when exploring the battlefield.

Culloden is open all year round and costs £10 for adults, £7.50 for concessions and is free for NTS members. Educational visits are £1.50 per visit.

C.3 BANNOCKBURN

In 1932 the Bannockburn Preservation Committee, under the Earl of Elgin and Kincardine, presented lands to the National Trust for Scotland. Further lands were purchased in 1960 and 1965 to facilitate visitor access.

Bannockburn attracts tourists from throughout the UK and from all over the world and forms part of a local network of heritage attractions including Stirling Castle and the Wallace Monument. In 2009, they attracted 50,571 visitors. The Battle features prominently in the Scottish school curriculum and school parties regularly visit the heritage centre and Battlefield.

The visitor centre operates as a paid attraction, and is open daily with extended hours in the summer months. The grounds are open all year, daily. The Visitor Centre also hosts a range of activities and events including battle re-enactments and living history presentations. There is no café but there are snacks available in the second hand book shop. The admission charge is £5.50 for adults and £4.50 for concessions.

C.4 SCOTTISH SEABIRD CENTRE

The Scottish Seabird Centre in North Berwick, approximately 20 minutes from Prestonpans and 35 miles from Edinburgh is most visited attraction in East Lothian with 291,474 visitors in 2009. The centre is rated 5 stars by Visit Scotland, and as well as being open for regular visits throughout the year, it also offers an extensive range of annual events which generate additional and repeat visits. In September alone the centre is due to host 14 events, ranging from photography exhibitions to a three day film festival. The centre also organises child-orientated activities throughout the year, such as bird themed arts and crafts and daily fish feeding shows.

The focus of many of these fun events are to educate and raise awareness, but the centre also hosts numerous workshops and formal sessions for schools and corporate groups, which offer sessions on nature related and environmental topics.

The Centre also has a café, conference space and a gift shop. The café aims to source local food when possible and serves a variety of light fayre items. The centre costs £7.95 for adults and £4.50 for children under 15. These prices include a 10% voluntary donation, however, there is an option to opt out of this.

C.5 MUSEUM OF FLIGHT

The Museum of Flight in Haddington, fifteen minutes from Prestonpans and 25 minutes from Edinburgh, attracted approximately 70,331 visitors in 2009. Run by the National Museums of Scotland, the museum is based on a former RAF airfield and is home to a collection of engines and aviation memorabilia displaying the evolution of flight. The star attraction, however, is the Concorde Experience permanent exhibition, which allows visitors to board the historic plane.

Regular admission to the museum is £9 and free for children. The cost includes Concorde boarding passes. There is a café serving light fayre and a gift shop on site.

The museum hosts a number of events throughout the year, including the East Fortune Airshow which attracted nearly 10,000 spectators. The museum caters for school visits at a cost of £2 per pupil.

C.6 FINDINGS

Key findings of the comparator research include:

- The necessity to maintain the integrity and historical accuracy of the project;
- Making attractions interactive and varied by incorporating events that will generate both new and repeat visitors;
- Partnering with other organisations (e.g. Museum of Flight and Seabird Centre);
- Developing multi functional facilities that can also accommodate conferences, events and other revenue generating activities;
- The two largest visitor attractions in East Lothian are not particularly close to Edinburgh or other attractions of interest indicating that their success is based on the uniqueness and quality of their product offering;

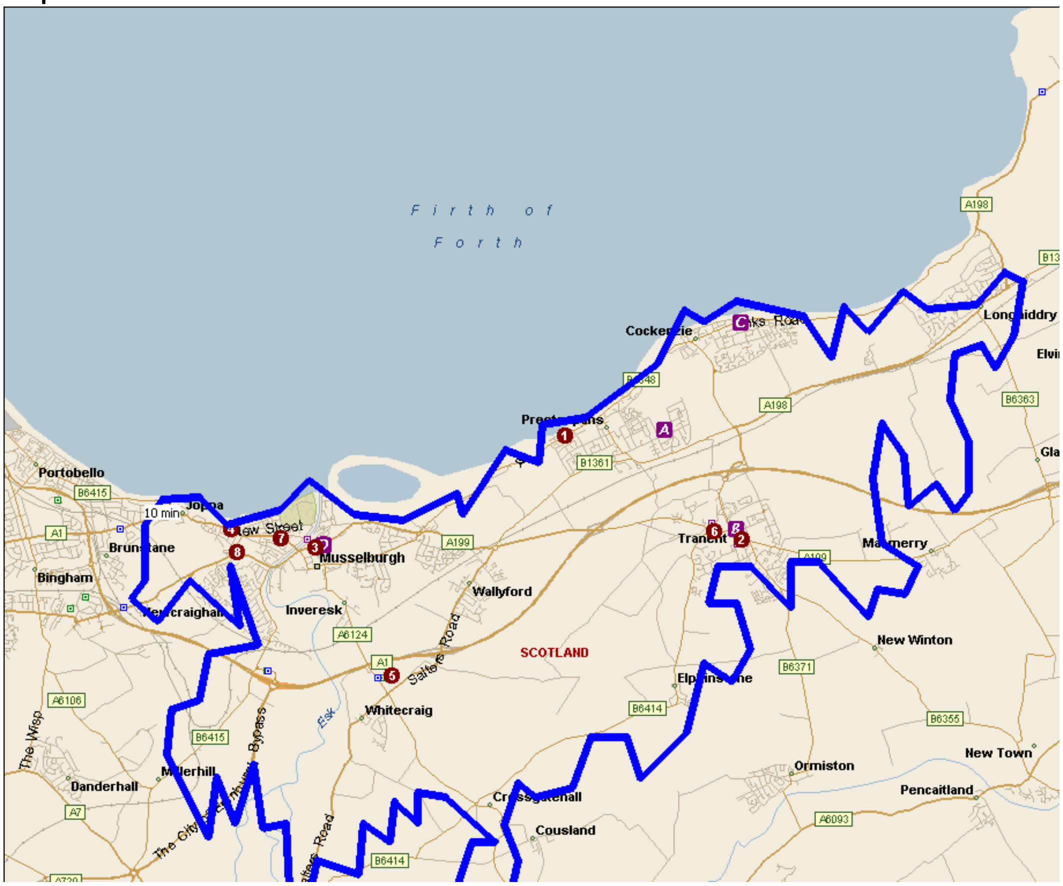
APPENDIX D: CATERING COMPETITOR SET

D.1 CATERING COMPETITORS: TEN MINUTE DRIVE

Map Ref	Restaurant	Cuisine
1	Gothenburg	Traditional
2	Kashmire Valley	Indian
3	Dragon Way	Chinese
3	Caprice	Other
3	Lanna	Thai
3	The Shish Mahal	Indian
4	Dynasty	Chinese
5	Brewers Fayre	Traditional
6	Brigadoon Restaurant	Traditional
7	Kopas	Other
7	Resturant 102	Other
8	Mayfair Bar and Restaurant	Traditional
A	Harbour Café	Café
B	Baguette Express	Café
C	Ocean Side East	Café
D	Tolbooth Coffee Shop	Café
D	3 in 1 Diner Musselburgh	Café
D	St Luca Café	Café

Source: RGA Research/Upmystreet

Map D.1: Location of Restaurants and Cafes within a ten minute drive time



Source: RGA Research/ Microsoft Autoroute

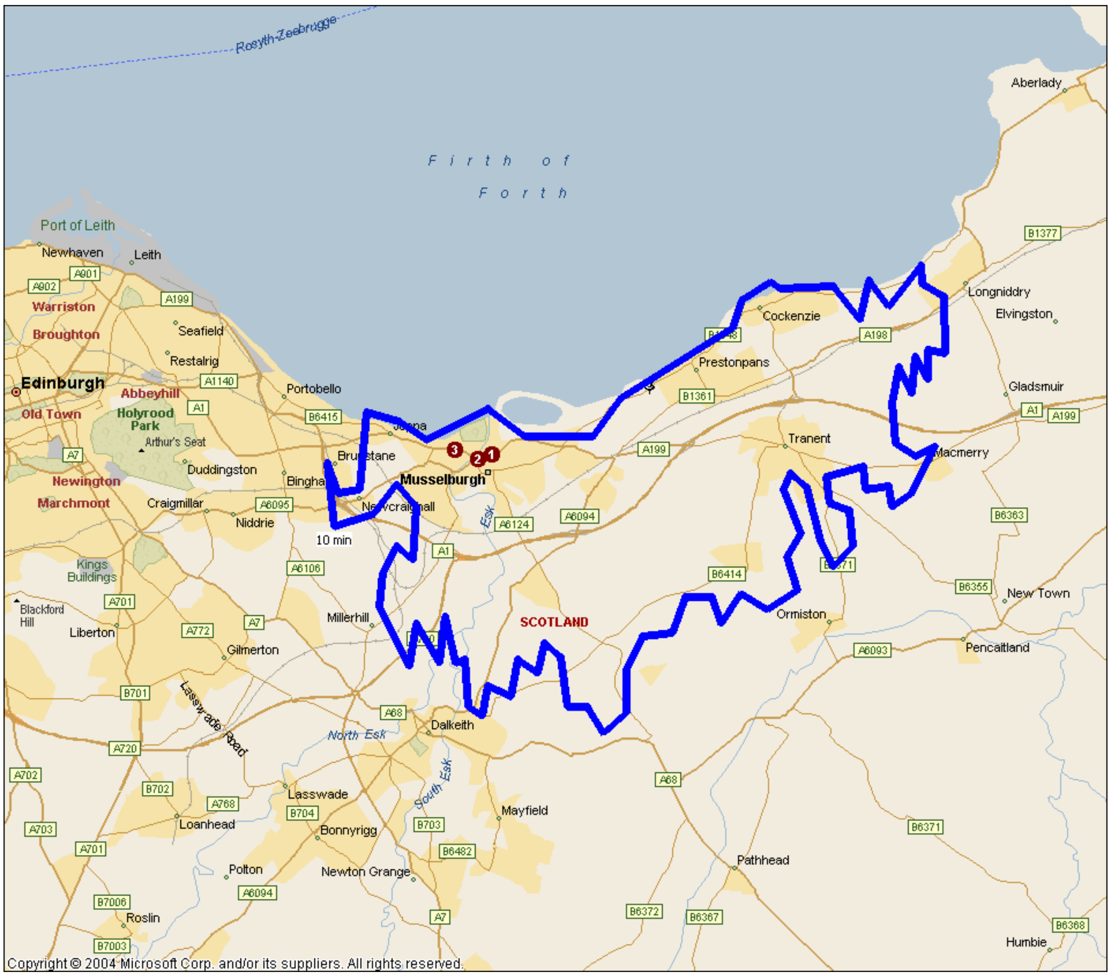
APPENDIX E: RETAIL COMPETITOR SET

Table E.1 – Gift retail: 10 minute drive time

Map Ref	Name
1	Musselburgh Card Centre
1	Just the Thing
2	Ali's Cave Emporium
3	Lily & Grace

Source: upmystreet.com/RGA

MAP E.1: Gift Retail: Ten Minute Drive Time



Autoroute/RGA Research

APPENDIX F: EDUCATION CONSULTATIONS

F.1 WENTWORTH CASTLE AND STAINSBOROUGH PARK

Wentworth Castle and Stainsborough Park in Barnsley, is an area characterized by high levels of social deprivation. The Trust at Wentworth has been very successful in developing projects that involve NEETs, a government classification for young people aged 16 – 18 who are “not currently involved in employment, education or training”. Consultations with the trust have indicated a shift in government priorities away from adult education to a youth focus.

Wentworth Castle works with Groundwork, a trust in England and Wales that partners with local authorities to develop sustainable communities. Groundwork has paid contracts from local authorities to provide social services such as graffiti removal, building playgrounds, planting bulbs and other services. In Barnsley, they have worked with schools to identify children around the age of 14 who are in danger leaving school at 16 with no prospects for the future. These children are then targeted for “re-engagement” through participating in learning which provides them some skills that can be used once they leave school.

Wentworth Castle does not actually provide any of these services but acts as a facilitator for Groundwork by providing facilities. Wentworth currently provides horticultural training at its gardens. They are also exploring the potential to develop a kitchen where culinary training can be provided. The kitchen would have to be used for other income generating activities in order to make it sustainable.

Limited capital and revenue funding exists and as such it is key to develop facilities that are sustainable through other means.

F.2 YOUTH LINK SCOTLAND

Initial consultations with Youth Link Scotland indicated potential contacts in the region which can be resourced through East Lothian council's Community Learning Team. The Team is a member of Youth Link Scotland and host a database of youth organisations in the area. Should the Centre wish to establish proceed with involving young people in the area, this could be an invaluable resource when initiating such a program.

APPENDIX G: MARKET AREA ATTRACTIONS

	30 Minute Attractions	**Town**	**Type**	**P/F**
1	Prestoungrange Heritage Museum	Prestonpans	Museum/ Gallery	Free
2	Preston Mill and Phantassie Doocot	East Linton	Visitor Attraction	Paid
3	Camera Obscura	Edinburgh	Visitor Attraction	Paid
4	Craigmillar Castle	Edinburgh	Castle/Historic Houses	Paid
5	Edinburgh Castle	Edinburgh	Castle/Historic Houses	Paid
6	Lauriston Castle and Grounds	Edinburgh	Castle/Historic Houses	Paid
7	St Giles Cathedral	Edinburgh	Religious Building	Free
8	St Mary's Episcopal Cathedral	Edinburgh	Religious Building	Free
9	Clan Tartan Centre - Leith Mills	Edinburgh	Visitor Centre	Free
10	City Art Centre	Edinburgh	Museum/ Gallery	Free
11	Dean Gallery	Edinburgh	Museum/ Gallery	Free
12	gallerA1	Edinburgh	Museum/ Gallery	Free
13	Hanover Fine Arts Gallery	Edinburgh	Museum/ Gallery	Free
14	Randolph Gallery	Edinburgh	Museum/ Gallery	Free
15	Scottish National Gallery of Modern Art	Edinburgh	Museum/ Gallery	Free
16	Scottish National Portrait Gallery	Edinburgh	Museum/ Gallery	Free
17	The Queen's Gallery - Palace of Holyroodhouse	Edinburgh	Museum/ Gallery	Paid
18	The Royal Scottish Academy Building	Edinburgh	Museum/ Gallery	Free
19	Royal Botanic Garden Edinburgh	Edinburgh	Parks and Gardens	Free
20	Gladstone's Land	Edinburgh	Castle/Historic Houses	Paid
21	The Georgian House	Edinburgh	Castle/Historic Houses	Paid
22	Edinburgh Dungeon	Edinburgh	Visitor Attraction	Paid
23	Mercat Tours	Edinburgh	General	Paid
24	The Real Mary King's Close	Edinburgh	Visitor Attraction	Paid
25	Nelson Monument	Edinburgh	Visitor Attraction	Paid
26	Scott Monument	Edinburgh	Visitor Attraction	Paid
27	Museum of Edinburgh (Former Huntly House Museum)	Edinburgh	Museum/ Gallery	Free
28	Museum Collections Centre	Edinburgh	Museum/ Gallery	Free
29	Museum of Childhood	Edinburgh	Museum/ Gallery	Free
30	Museum on the Mound	Edinburgh	Museum/ Gallery	Free
31	National Library of Scotland	Edinburgh	Museum/ Gallery	Free
32	National Museum of Scotland	Edinburgh	Museum/ Gallery	Free
33	National War Museum	Edinburgh	Museum/ Gallery	Free
34	No. 28 Charlotte Square	Edinburgh	Museum/ Gallery	Free
35	Royal Scots Regimental Museum	Edinburgh	Museum/ Gallery	Free
36	Scottish Storytelling Centre - John Knox House	Edinburgh	Museum/ Gallery	Paid

37	Surgeons Hall Museum	Edinburgh	Museum/ Gallery	Paid
38	The People's Story	Edinburgh	Museum/ Gallery	Free
39	The Royal Scots Dragoon Guards Regimental Museum	Edinburgh	Museum/ Gallery	free
40	The Writers Museum and Makars Court	Edinburgh	Museum/ Gallery	Free
41	Caiy Stone	Edinburgh	Nature attractions	Free
42	Erraid Wood	Edinburgh	Nature attractions	Free
43	Red Moss of Balerno	Edinburgh	Nature attractions	Free
44	Palace of Holyroodhouse	Edinburgh	Castle/Historic Houses	Paid
45	Our Dynamic Earth	Edinburgh	Museum/ Gallery	Paid
46	Edinburgh Zoo	Edinburgh	Farm/Zoo	Paid
47	Scotch Whiskey Heritage Centre	Edinburgh	Visitor Attraction	Paid
48	The Royal Yacht Britannia	Edinburgh	Visitor Attraction	paid
49	The Scottish Parliament	Edinburgh	Visitor Attraction	Free
50	The Water of Leith Visitor Centre	Edinburgh	Visitor Attraction	Free
51	Dalkeith Country Park	Dalkeith	Parks and Gardens	Paid
52	Inveresk Lodge Garden	Musselburgh	Parks and Gardens	Paid
53	Newhailes	Musselburgh	Castle/Historic Houses	Paid
54	Tantallon Castle	North Berwick	Castle/Historic Houses	Paid
55	Westage Gallery	North Berwick	Museum/ Gallery	Free
56	National Flag Heritage Centre	North Berwick	Visitor Attraction	Free
57	Pitclay Gallery	North Berwick	Museum/ Gallery	Free
58	Scottish Seabird Centre	North Berwick	Visitor Attraction	Paid
59	Peter Potter Gallery	Haddington	Museum/ Gallery	Free
60	Lennoxlove House	Haddington	Castle/Historic Houses	Paid
61	Direlton Castle	Direlton	Castle/Historic Houses	Paid
62	Edinburgh Butterfly and Insect World	Lassawade	Visitor Attraction	Paid
63	Scottish Mining Museum	Newtongrange	Museum/ Gallery	Paid
64	Myreton Motor Museum	Aberlady	Museum/ Gallery	Paid
65	National Museum of Flight	Haddington	Museum/ Gallery	Paid
66	National Gallery of Scotland	Edinburgh	Museum/ Gallery	Free
67	Fruitmarket Gallery	Edinburgh	Museum/ Gallery	Free
68	Rosslyn Chapel	Roslin	Church	Paid
69	Gorgie City Farm	Edinburgh	Farm/Zoo	Free
70	Collective Gallery	Edinburgh	Museum/ Gallery	Paid
71	Greyfriar's Kirk	Edinburgh	Church	Free
72	Edinburgh Printmakers ltd	Edinburgh	Museum/ Gallery	Free
73	Brass Rubbing Centre	Edinburgh	Museum/ Gallery	Free
74	Parish Church of St Cuthbert	Edinburgh	Church	Free
75	St Mary's Parish Church	Haddington	Church	Free

76	Seton Collegiate Church	Longniddiry	Church	Paid
77	Arniston House	Gorebridge	Castle/Historic Houses	Paid
78	Trinity House	Edinburgh	Castle/Historic Houses	Free
79	Vogrie Country Park	Gorebridge	Parks and Gardens	Free
80	Crichton Collegiate Church Trust	Crichton	Visitor Attraction	Free
81	Roslin Glen Country Park	Roslin	Parks and Gardens	Free
82	The 3D Loch Ness Experience in Edinburgh	Edinburgh	Visitor Attraction	Paid
83	Scotlands People Family History Centre	Edinburgh	Visitor Attraction	Free
84	Glenkinchie Distillery	Pencaitland	Visitor Attraction	Paid
85	Soutra Isle	Pathhead	General	Free
86	Crichton Castle	Crichton	Castle/Historic Houses	Paid
87	Queensferry Museum	South Queensferry	Museum/ Gallery	Free
88	Dalmeny House	Edinburgh	Castle/Historic Houses	Paid
89	Almondell and Calderwood Country Park	Broxburn	Parks and Gardens	Free
90	Kirk of Calder	Mid Calder	Religious Building	Free
91	Malleny Gardens	Edinburgh	Parks and Gardens	Paid
92	Hopetoun House	South Queensferry	Castle/Historic Houses	Paid
93	Dancing Light Gallery	West Linton	Museum/ Gallery	
94	The Linlithgow Story	Linlithgow	Museum/ Gallery	Free
95	Linlithgow Palace	Linlithgow	Castle/Historic Houses	Paid
96	Beecraigs Country Park	Linlithgow	Parks and Gardens	Free
97	Muiravonside Country Park	Linlithgow	Parks and Gardens	Free
98	Linlithgow Canal Centre	Linlithgow	Visitor Centre	Free
99	Linlithgow Union Canal Society	Linlithgow	Visitor Attraction	Free
100	St Michael's Parish Church	Linlithgow	Church	Free
101	Five Sisters Zoo Park	West Calder	Visitor Attraction	Paid
102	Almond Valley Heritage Centre	Livingston	Visitor Attraction	Paid
103	Dunbar Town House Museum	Dunbar	Museum/ Gallery	Free
104	East Links Family Park	Dunbar	Parks and Gardens	Paid
105	John Muir Birthplace	Dunbar	Museum/ Gallery	Free
106	John Muir Country Park	Dunbar	Parks and Gardens	Free
107	Cairnpapple Hill	Bathgate	Parks and Gardens	Paid
108	Bennie Museum	Bathgate	Museum/ Gallery	Free
109	Polkemmet Country Park	Bathgate	Parks and Gardens	Free
110	Thirlestane Castle	Lauder	Castle/Historic Houses	Paid
111	Tweed Valley Forest Park	Peebles	Parks and Gardens	Free
112	Tweeddale Museum & Gallery	Peebles	Museum/ Gallery	Free
113	Kailzie Gardens	Peebles	Parks and Gardens	Paid
114	Peebles Quadrangle	Peebles	Parks and Gardens	Free

115	Mellerstain House	Berwickshire	Castle/Historic Houses	Paid
116	Pease Dean	Dunbar	Nature attractions	Free
117	Cardrona Forest	Peebles	Parks and Gardens	Free
118	Smailholm Tower	Kelso	Castle/Historic Houses	Paid
119	Whitmuir The Organic Place	Lamancha	Farm/Zoo	
120	Blackness Castle	Blackness	Castle/Historic Houses	Paid
121	House of The Binns	Blackness	Castle/Historic Houses	Paid
122	Birkhill Fireclay Mine	Bo'ness	Visitor Centre	Paid
123	Kinneil Museum	Bo'ness	Museum/ Gallery	Free
124	Scottish Railway Exhibition	Bo'ness	Visitor Centre	Paid
125	The Bo'ness and Kinneil Railway	Bo'ness	Visitor Centre	Paid
126	Deep Sea World	North Queensferry	Farm/Zoo	Paid
127	Aberdour Castle	Aberdour	Castle/Historic Houses	Paid
128	Abbot House	Dunfermline	Castle/Historic Houses	Free
129	St Margaret's Cave	Dunfermline	Castle/Historic Houses	Free
130	Andrew Carnegie Birthplace Museum	Dunfermline	Museum/ Gallery	Free
131	Pittencrief House Museum	Dunfermline	Museum/ Gallery	Free
132	Dunfermline Palace & Abbey	Dunfermline	Castle/Historic Houses	Paid
133	Pittencrief Park	Dunfermline	Castle/Historic Houses	Free
134	Townhill Country Park	Townhill	Parks and Gardens	Free
135	Black Hill	Blackwood	General	Free
136	Belshill Cultural Centre	Belshill	Visitor Centre	Free
137	Sir John Wilson Town Hall	Airdrie	Visitor Centre	Free
138	Bothwell Castle	Udddingston	Castle/Historic Houses	Paid
139	Craignethan Castle	Lesmahagow	Castle/Historic Houses	Paid
140	Clyde Valley Woodlands	Carluke	Parks and Gardens	Free
141	Viewpark Gardens	Udddingston	Parks and Gardens	Free
142	Chatelherault	Hamilton	Castle/Historic Houses	Free
143	Colzium Lennox Estate & Garden	Kilsyth	Castle/Historic Houses	Free
144	New Lanark Visitor Centre	New Lanark	Visitor Centre	Paid
145	Hamilton Mausoleum	Hamilton	Museum/Gallery	Paid
146	Cameronian's Regimental Memorial	Douglas	General	Free
147	Cumbernauld Museum	Cumbernauld	Museum/Gallery	Free
148	Palacerigg Country Park	Cumbernauld	Parks and Gardens	Free
149	David Livingstone Centre	Blantyre	Museum/Gallery	Paid
150	Kilsyth's Heritage	Kilsyth	Museum/Gallery	Free
151	Low Parks Museum	Hamilton	Museum/Gallery	Free
152	Falls of Clyde Visitor Centre & Wildlife Reserve	New Lanark	Visitor Centre	Paid
153	Lower Nethan Gorge	Lanark	Parks and Gardens	

154	Dalzell Park	Motherwell	Parks and Gardens	Free
155	Drumpellier Country Park	Coatbridge	Parks and Gardens	Free
156	Lanark Moor Country Park	Lanark	Parks and Gardens	Free
157	Strathclyde Country Park	Motherwell	Parks and Gardens	Free
158	Tollcross Park	Glasgow	Parks and Gardens	Free
159	Carmichael Visitor Centre	Carmichael	Visitor Centre	Paid
160	M&D's Scotland's Theme Park	Motherwell	Visitor Attraction	Paid
161	Motherwell Heritage Centre	Motherwell	Visitor Centre	Free
162	Shotts Heritage Centre	Shotts	Visitor Centre	Free
163	Summerlee Industrial Museum	Coatbridge	Parks and Gardens	Free
164	Greenhill Covenanters House	Biggar	Museum/Gallery	Paid
165	Ayton Castle	Eyemouth	Castle/Historic Houses	Paid
166	Chain Bridge Honey Farm	Berwick-Upon-Tweed	Farm/Zoo	Free
167	Floors Castle	Kelso	Castle/Historic Houses	Paid
168	Buy Design	Jedburgh	Visitor Centre	Free
169	Dryburgh Abbey	Melrose	Religious Building	Paid
170	Bank Street Gardens	Galashiels	Parks and Gardens	Free
171	Borders Family History Society	Galashiels	General	Free
172	Abbortsford	Melrose	Castle/Historic Houses	Paid
173	Bowhill House & Country Park	Selkirk	Castle/Historic Houses	Paid
174	Buccleuch Countryside Service	Selkirk	Castle/Historic Houses	Free
175	Philiphaugh Salmon Viewing Centre	Selkirk	Visitor Attraction	Free
176	Dawyck Botanic Garden	Peebles	Parks and Gardens	Paid
177	Jedburgh Abbey	Jedburgh	Religious Building	Paid
178	Kelso Abbey	Kelso	Religious Building	Free
179	Melrose Abbey	Melrose	Religious Building	Paid
180	The Hirsel Arts & Craft Centre	Coldstream	Visitor Centre	Free
181	Yair Forest	Selkirk	Nature attractions	Free
182	John Nelson Studio Gallery	Selkirk	Museum/Gallery	Free
183	Old Gala House & Scott Gallery	Galashiels	Museum/Gallery	Free
184	Harmony Garden	Melrose	Parks and Gardens	Paid
185	Hume Castle	Hume	Castle/Historic Houses	Free
186	Mertoun Gardens	Melrose	Parks and Gardens	Paid
187	Monteviot House Gardens	Jedburgh	Parks and Gardens	Paid
188	Priorwood Garden and Dried Flower Shop	Melrose	Parks and Gardens	Paid
189	War Memorial Garden	Kelso	Parks and Gardens	Free
190	Lindean Mill Glass	Galashiels	Visitor Centre	Free
191	Twist Glass Studio	Selkirk	Visitor Centre	Free
192	Manderston	Duns	Castle/Historic Houses	Paid

193	Paxton House, Gallery & Country Park	Berwick-Upon-Tweed	Castle/Historic Houses	Paid
194	Traquair House	Innerleithen	Castle/Historic Houses	Paid
195	St Ronan's Wells Interpretive Centre	Innerleithen	Castle/Historic Houses	Free
196	Thornylee Forest	Innerleithen	Parks and Gardens	Free
197	Halliwell's House Museum	Selkirk	Museum/Gallery	Free
198	Jeburgh Castle Jail & Museum	Jedburgh	Museum/Gallery	Free
199	Robert D Clapperton Photographic	Selkirk	Museum/Gallery	Paid
200	Sir Walter Scott's Courtroom	Selkirk	Museum/Gallery	Free
201	The Jim Clark Room	Duns	Museum/Gallery	Free
202	St Abbs Head	Eyemouth	Nature attractions	Paid
203	The Hirsel & Homestead Museum	Coldstream	Parks and Gardens	Free
204	Robert Smails Printing Works	Innerleithen	Visitor Centre	Paid
205	The Hawick Cashmere Company	Hawick	Visitor Centre	Free
206	Harestanes Countryside Visitor Centre	Jedburgh	Visitor Centre	Free
207	Lochcarron Visitor Centre	Selkirk	Visitor Centre	Free
208	Mary Queen of Scots Visitor Centre	Jedburgh	Visitor Centre	Free
209	101 Aker Wood Visitor Centre	Melrose	Visitor Centre	Free
210	Teviot Smokery and Watergardens	Kelso	Visitor Centre	Free
211	Three Hills Roman Heritage Centre	Melrose	Visitor Centre	Paid
212	Borders Textile Towerhouse	Hawick	Visitor Centre	Free
213	Hawick Museum & Scott Art Gallery	Hawick	Museum/Gallery	Free
214	Wilton Lodge Park	Hawick	Parks and Gardens	Free
215	Hawick Walled Gardens	Hawick	Parks and Gardens	Free
216	The Falkirk Wheel	Falkirk	Visitor Centre	Paid
217	The Bridge of Allan Brewery	Bridge of Allan	Visitor Centre	Free
218	Castle Campbell	Dollar	Castle/Historic Houses	Paid
219	Menstrie Castle	Clackmannan	Castle/Historic Houses	Free
220	Stirling Castle	Stirling	Castle/Historic Houses	Paid
221	Dunblane Cathedral	Dunblane	Religious Building	Free
222	Church of the Holy Rude	Stirling	Religious Building	Free
223	Park Gallery	Callendar Park	Museum/Gallery	Free
224	Smith Art Gallery & Museum	Stirling	Museum/Gallery	Free
225	The Fotheringham Gallery	Bridge of Allan	Museum/Gallery	Free
226	Dunmore Pineapple	Airth	Parks and Gardens	Free
227	Village Glass	Bridge of Allan	Visitor Centre	Free
228	Ochil Hills Woodland Park	Alva	Parks and Gardens	Free
229	Alva Glen	Alva	Parks and Gardens	Free
230	Callendar House & Park	Falkirk	Castle/Historic Houses	Free
231	Antonine Wall	Falkirk	General	Free

232	The Tolbooth	Stirling	Castle/Historic Houses	Free
233	Cowane's Hospital	Stirling	Castle/Historic Houses	Free
234	Argyll's Lodging	Stirling	Castle/Historic Houses	Free
235	Cambuskenneth Abbey	Stirling	Religious Building	Free
236	Stirling Old Town Jail	Stirling	Castle/Historic Houses	Paid
237	Flanders Moss	Trossachs	Nature attractions	Free
238	National Wallace Monument	Bridge of Allan	Visitor Attraction	Paid
239	Dollar Museum	Dollar	Museum/Gallery	Free
240	Grangemouth Museum	Grangemouth	Museum/Gallery	Free
241	Regimental Museum	Stirling	Museum/Gallery	Free
242	Dollar Park	Falkirk	Parks and Gardens	Free
243	Gartmorn Dam Country Park	Alloa	Parks and Gardens	Free
244	Kings Park	Stirling	Parks and Gardens	Free
245	Plean Country Park	Plean	Parks and Gardens	Free
246	Pullar Memorial Park	Bridge of Allan	Parks and Gardens	Free
247	South Bantaskine Estate Public Park	Falkirk	Parks and Gardens	Free
248	Alloa Tower	Alloa	Castle/Historic Houses	Paid
249	Clackmannan Tower	Menstrie	Castle/Historic Houses	Free
250	Doune Castle	Doune	Castle/Historic Houses	Paid
251	Blair Drummond Safari & Adventure Park	Blair Drummond	Farm/Zoo	Paid
252	Briarlands Farm	Blair Drummond	Farm/Zoo	Paid
253	Bannockburn Heritage Centre	Stirling	Visitor Centre	Paid
254	Mill Trail Visitor Centre	Alva	Visitor Centre	Free
255	Royal Burgh of Stirling	Stirling	Visitor Centre	Free
256	Xtreme Karting	Larbert	Visitor Centre	Paid
257	Elcho Castle	Rhynd	Castle/Historic Houses	Paid
258	Lochleven Castle	Kinross	Castle/Historic Houses	Paid
259	The Fergusson Gallery	Perth	Museum/Gallery	Free
260	Branklyn Garden	Perth	Parks and Gardens	Paid
261	Bishop Hill	Kinross	Nature attractions	Free
262	Museum of Abernethy	Abernethy	Museum/Gallery	Free
263	Portmoak Moss	Scotlandwell	Nature attractions	
264	Loch Leven Nature Reserve	Kinross	Nature attractions	Free
265	Vane Farm	Kinross	Farm/Zoo	Paid
266	Kilmagadwood	Scotlandwell	Parks and Gardens	Free
267	Inchcolm Abbey	Thornton	Religious Building	Paid
268	Aberdour Silver Sands & Black Sands	Aberdour	Nature attractions	Free
269	Ravenscraig Castle	Leven	Castle/Historic Houses	Free
270	Silverburn Estate	Lundin Links	Parks and Gardens	Free

271	Letham Glen	Leven	Nature attractions	Free
272	Culross Palace	Culross	Castle/Historic Houses	Paid
273	Buckhaven Museum	Buckhaven	Museum/Gallery	Free
274	Burntisland Edwardian Fair Museum	Burntisland	Museum/Gallery	Free
275	John McDouall Stuart Museum	Kirkcaldy	Museum/Gallery	Free
276	Kirkcaldy Museum & Art Gallery	Kirkcaldy	Museum/Gallery	Free
277	Methill Heritage Centre	Methill	Museum/Gallery	Free
278	Scottish Vintage Bus Museum	Bowershall	Museum/Gallery	Paid
279	Falkland Palace	Falkland	Castle/Historic Houses	Paid
280	Beveridge Park	Kirkcaldy	Parks and Gardens	Free
281	Ravenscraig Park	Kirkcaldy	Parks and Gardens	Free
282	Earthship Visitor Centre	Kinghorn	Visitor Centre	Free
283	Harbourmaster's House	Dysart	Visitor Centre	Free
284	Kathellan Fine Foods & Gifts	Kelty	Visitor Centre	Free
285	North Queensferry Harbour Light Tower	North Queensferry	Visitor Centre	Paid

APPENDIX H: SOURCES AND REFERENCES

Section	Web link/Contact Number
Market Background	Scottish Government Office of National Statistics VisitScotland City of Edinburgh Council Mintel East Lothian Council East Lothian Tourism Action Plan 2007 – 2010 ACORN Scottish Council of Independent Schools General Registers Office for Scotland
Visitor Attractions	VisitScotland Visitor Attractions Monitor 2009 www.visitscotland.com VisitBritain Historic Scotland
Learning	Queen Margaret University – Dave Maguire RBGE City of Edinburgh Council Wentworth Castle – Richard Evans Youth Link Scotland – Gillian Lithgow
Comparator Research	NTS Website Scottish Seabird Centre website National Museum of Flight website
Battlefield Tourism	www.dark-tourism.org.uk NTS

APPENDIX I. ASSUMPTIONS TO PROJECTIONS

The assumptions to the projections are stated in present values.

Admissions By Ticket Type	**1**	**2**	**3**	**4**	**5**
Friends	0	0	0	0	0
Family	16,916	15,062	15,425	15,795	16,184
Group	4,570	4,070	4,168	4,268	4,374
School Group	1,381	1,185	1,170	1,154	1,139
Standard Senior	10,677	9,567	9,858	10,144	10,470
Standard Adult	61,214	54,445	55,697	56,984	58,310
Standard Child	-395	-342	-345	-346	-351
Under 5	3,776	3,366	3,450	3,536	3,625
NTS Memvber (Free)	0	0	0	0	0
All tickets	**98,139**	**87,353**	**89,422**	**91,536**	**93,751**

Paid Admissions	
Senior	£5.50
Adult	£6.50
Child	£4.00
% of over 5s (of children)	69%
Season Ticket	£0.00
Family Ticket	£20.00
Group Rate	£7.00
School Group Rate	£4.50
VAT	20.0%

Catering Capture		**Retail Capture**	
Local Residents - (East Lothian)	45%	Local Residents - (East Lothian)	28%
Day Trip - 0 / 30 Minute Drivetime	45%	Day Trip - 0 / 30 Minute Drivetime	28%
Day Trip - 30- 90 Minute Drive Time	45%	Day Trip - 30- 90 Minute Drive Time	28%
School Education (90 Minute Drive Time)	10%	School Education (90 Minute Drive Time)	28%
UK Tourists 90 min drivetime area	45%	UK Tourists 90 min drivetime area	28%
Overseas Tourists 90 min drivetime area	45%	Overseas Tourists 90 min drivetime area	28%
National Trust Members (120 min drivetime)	45%	National Trust Members (120 min drivetime)	28%
Special Interest: Scottish Diaspora	45%	Special Interest: Scottish Diaspora	28%

Cost of Sales		
Retail Cost of Sales	53%	
Catering Cost of Sales	27%	
School Visit Costs	£0.30	per school visit

Marketing	
Media Spend	10,000
Advertising Agency Retainer	3000
Production	2,000
Tourist/ad hoc advertising	2,000
Bedroom packs	0
Exhibitions	0
Website development and maintenance	3,000
New Media Promotions	2,000
Print cost - design and production	3,000
Print distribution	3,000
Direct Mail	5,000
Promotions and events	1,000
Entertainment and familiarisation	100
Travel	1,000
Visitor research	2,000
Partnership development and maintenance	0
2009 launch budget	0
Contingency (5%)	1,855
Total Marketing Costs	£38,955

Administrative and General			
Training	2%	payroll	5,962
Travel			2,000
Insurance			5,000
Credit Card Transaction Fee	1%	Income	8,584
Office Costs			15,000
Bank Fees			2,000
Total Administration Costs			£38,546

Building and Maintenance	
Rates	0
Water Rates	5,000
Heat, light and power	18,000
Repairs and renewals	25,000
Building Insurance	10,000
Exhibition Maintenance and Renewal	10,000
Maintenance Charges	12,000
Garden Maintenance	3,000
Cleaning Materials	1,000
Total	£84,000

Core Staff

	2013	2014
Core Staff		
Property Manager	1	1
Retail Manager	1	1
Catering Manager	1	1
Exhibition Manager	0	0
Commercial/marketing manager	1	1
Cashier	0	0
Maintenance and Technical Manager	1	1
Education Officer	1	1
Total Core Staff:	6	6
Operational Staff		
Membership Officer	0	0
Administrative Assistant	1	1
Visitor Desk Staff	1	1
Performers/actors	0	0
Kitchen Supervisor	1	1
Catering Staff (Serving)	1	1
Catering Staff (Kitchen Assistants)	1	1
Gardeners	0	0
Cleaner	1	1
Total Operational Staff	6	6
Seasonal Staff (half of the year)		
Customer Services Staff	3	2
Retail Assistant	1	1
Kitchen Assistant	1	1
Servery Assistant	2	1
Membership Officer	0	0
Cleaner	0.5	0.5
Total Seasonal Staff (April - Sept only)	7.5	5.5
Total	19.5	17.5

Proj 1865 001 Prestonpans Visitor Experience Feasibility Update

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