

The background of the slide features a large, light blue outline of the City of Vancouver's coat of arms. The crest includes a crown with four maple leaves, a shield divided into four quadrants (top-left: a ship, top-right: a beaver, bottom-left: a ship, bottom-right: a beaver), and a banner at the bottom with the motto 'CITY OF VANCOUVER'.

# **AGENDA ITEM**

**8**

## **Tourism 2020 Update on Progress**

**FALKIRK COUNCIL**

**Title:** Tourism 2020 Update on Progress  
**Meeting:** Executive  
**Date:** 10 January 2017  
**Submitted By:** Director of Development Services

**1. Purpose of Report**

- 1.1 The purpose of the report is to provide an update on the Council's tourism activity since the launch of the Falkirk Area Tourism Strategy 2015-2020 and to seek agreement to participate in the formation of a VisitFalkirk partnership to progress joint marketing activity.

**2. Recommendation(s)**

**2.1 It is recommended that the Executive:**

- 1. Notes the contents of this report in relation to tourism growth in the Falkirk area, as presented in the 2015 STEAM report**
- 2. Notes that an application has been submitted to the Visit Scotland Growth Fund, seeking support for marketing activity.**
- 3. Agrees in principle to the formation of a new Visit Falkirk organisation to take forward marketing activities jointly with key partners, with a further report to be supplied on the details of this proposal.**

**3. Background**

- 3.1 The importance of tourism to the Falkirk economy continues to grow following the creation of the Falkirk Wheel, the Helix Park and the Kelpies. Significant investment is being made in existing attractions such as the Falkirk Wheel, in new attractions coming on line and in the area's tourist accommodation sector.
- 3.2 The Falkirk Area Tourism Strategy – *Tourism Falkirk 2020* aims to make Falkirk a destination of first choice with high quality, value for money and world-class attractions offering memorable customer experience delivered by skilled and passionate people. It was developed by the Council and its partners in 2015 in conjunction with local tourism businesses, national stakeholders and local communities.
- 3.3 The tourism strategy sets three key targets:
- Increase visitor expenditure in the Falkirk area by 20% over the next five years to 2020;

- Increase overnight visitor accommodation (serviced bedrooms and self-catering units) in the Falkirk area by 20% over the next five years to 2020; and
- To develop a Falkirk Area Tourism Partnership to take ownership of, to review and to implement the strategy

3.4 Despite budget pressures in this area of work, the results from joint marketing activity undertaken with Visit Scotland have been excellent. The full results of this activity can be found in the attached Appendix.

#### 4. Considerations

4.1 Each year the Council commissions an external report, based on an economic model, STEAM, to monitor the economic impact of tourism. The August 2016 STEAM report details the growth of tourism in the Falkirk area in the past year. The most significant statistics from this report are as follows:

- visitor numbers to the Falkirk area between 2009 and 2015 increased by 41%.
- visitor numbers to the Falkirk area between 2014 and 2015 increased by 18.9%
- the economic impact of tourism to the Falkirk area between 2009 and 2015 increased by 45.4%
- the economic impact of tourism to the Falkirk area in one year between 2014 and 2015 increased by 8.9%
- total full time tourism employment within the Falkirk Area in one year between 2014 and 2015 increased by 4.7% with 1920 people now working in the sector.

4.2 Falkirk recorded the second highest level of growth of any area in Scotland in relation to tourism in 2015. Additional results from the 2015 STEAM report, can be found in the attached Appendix.

4.2 VisitScotland's Growth Fund supports collaborative marketing projects to assist growth in the tourism sector and is part of the national *Spirit of Scotland* marketing tourism campaign. The fund offers a platform to support local tourism bodies in leveraging additional and focused marketing investment; to stimulating collaboration within the industry; create closer working with VisitScotland and achieve strategic alignment with the national Tourism 2020 strategy.

4.3 The Council and tourism partners in the Falkirk area are making an application to this fund to develop a series of video itineraries based on heritage, family fun, cycling, motion (focusing on previous film locations) and more. The development of the Falkirk Film itineraries will build on the growth of film tourism for visitors in the area. Film and resources for these itineraries will be hosted on [www.visitfalkirk.com](http://www.visitfalkirk.com) and shared through social media channels. Funding will also be sought to fund an innovative digital marketing campaign to promote the video itineraries, aiming in particular at travellers from outwith a 90 minute drive time e.g. North of England, Yorkshire to encourage a two to

three night stay in the area. The results of the application will be known in March 2017.

- 4.3 The Falkirk area Tourism Partnership operates as an informal body at present and involves the Council, VisitScotland, Falkirk Towns, Falkirk Community Trust, Scottish Canals and Bo'ness and Kinneil Railway. The Partnership is being developed in the context of reducing funds being available from the Council. In order to help attract external funds to develop and deliver future marketing activity, it is suggested that a more formal mechanism be established. It is recommended that a more formal body be established for Visit Falkirk tourism promotion activity. In principle agreement for this body is sought from the Executive and, if agreed, this work will be progressed by the partners with a report on the proposal to be brought back for formal agreement by the Executive.

## **5. Consultation**

- 5.1 Tourism businesses have been consulted in relation to the development of a formal Tourism Partnership model at a VisitFalkirk tourism breakfast event on the 8<sup>th</sup> December and via monthly Visit Falkirk ezines. A number of tourism businesses have been consulted in the latest Growth Fund application

## **6. Implications**

### **Financial**

- 6.1 The Tourism Strategy is being delivered within current revenue budgets, supplemented where possible through contributions from partners. These partners have been alerted that future activity is anticipated to be greatly reduced as a consequence of budget pressures.

### **Resources**

- 6.2 None.

### **Legal**

- 6.3 None

### **Risk**

- 6.4 None.

### **Equalities**

- 6.5 No equality and poverty impact assessment was required.

### **Sustainability/Environmental Impact**

- 6.6 No sustainability assessment has been completed as part of compiling the report.

## **7. Conclusions**

- 7.1 Tourism in the Falkirk area is continuing to grow and, as can be seen from the latest STEAM figures, it is becoming an increasingly important sector within the area's economy. Given the Council's budget pressures in this area there is a need to attract additional support to continue to raise awareness of the Falkirk area as a tourism destination. It is also important that tourism businesses within the Falkirk area are fully engaged with the activity being taken forward and as such the introduction of a formal partnership model to take this forward is required. The in-principle agreement of the Executive for this body's formation will enable further details of this proposal to be developed.

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Director of Development Services

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**Date:** 20<sup>th</sup> December 2016

## **APPENDICES**

Appendix One – Tourism Support Progress Report

### **List of Background Papers:**

**The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act 1973:**

- None

## APPENDIX 1

### TOURISM SUPPORT PROGRESS REPORT

#### 1. INTRODUCTION

This report provides an update on the Council's tourism support activity as delivered by the Growth & Investment Unit within Development Services along with key tourism partners.

#### 2. FALKIRK AREA TOURISM PERFORMANCE

##### **2.1 STEAM (Scarborough Tourism Economic Model) statistics for the Falkirk Area**

STEAM quantifies the local economic impact of tourism, from both staying and day visitors, through analysis and use of a variety of inputs including visitor attraction numbers, tourist accommodation bedstock, events attendance, occupancy levels, accommodation tariffs, macro-economic factors, visitor expenditure levels, transport use levels and tourism-specific economic multipliers.

##### **Considerations for 2015 STEAM report results**

- 2015 was the rainiest year since 1910
- 2015 – June and July were the rainiest months
- Across the board day visitors to Scotland saw a decrease in 2015
- The Visitor and Attraction Monitor for Scotland also saw an associated drop

##### **2015 Falkirk Area Results**

With the exception of Orkney, which saw significant growth due to the impact of cruise ships, Falkirk is the best performing local authority area in terms of visitor number increases between 2014 and 2015.

<b>Falkirk Area Comparative Headlines</b>	<b>2014</b>	<b>2015</b>	<b>+/- %</b>
<b>Day Visitors</b>	<b>376, 400</b>	<b>447,500</b>	<b>18.9 % increase</b>
Staying in Paid Accom – Serviced	233,600	241,800	3.6% increase
Staying in Paid Accom – Non Serviced	6,237	5,884	5.7 % decrease *
Staying with Friends & relatives	180,150	181,580	0.8% increase
<b>ECONOMIC IMPACT £M</b>	<b>97.04</b>	<b>105.7</b>	<b>8.9% increase</b>
Total Employment (FTE's)	1,833	1,920	4.7% increase

\*part of this decrease is attributable to more accurate information regarding accommodation suppliers in the Falkirk Area

## Key Trends 2009 – 2015

	2009	2010	2011	2012	2013	2014	2015	% Change from 2009
Visitor Numbers	620,480	628,040	621,580	627,670	627,890	796,140	876,760	41.3%
Visitor Days	1,443,880	1,462,150	1,468,680	1,462,920	1,474,100	1,650,920	1729.51	19.8%
Economic Impact (£MN)	72.71	76.23	79.33	81.2	84.09	97.04	105.7	45.4%
Total Employment (FTE's)	1,675	1,658	1,641	1,627	1,631	1,833	1,920	14.6%

## 2.2 Visit Scotland – VIC Performance

Figures in the table below illustrate the performance of the Visit Scotland Information Centre based at the Falkirk Wheel.

	2013/14	2014/15	2015/16
<b>VIC Footfall</b>	37,308	45,501	49,435
<b>VIC Bookings</b>	45	54	41
<b>VIC £ Additionality</b>	199,597	243,430	264,477

Following a strong year in 2014, footfall shows a further marked increase – up by 8.6% over the period April 2015 to March 2016.

This is likely due to the continued growth in interest in the Falkirk area following the launch of the Kelpies the year before and new attractions at the Falkirk Wheel itself.

## 2.3 Visitor Numbers to Key Attractions

The following table highlights visitor numbers at local attractions within the Falkirk area:

Attraction	2012	2013	2014	2015
The Falkirk Wheel	414,386	406,693	514,170	595,750
Bo'ness & Kinneil Railway	64,647	68,306	68,329	73,784
Blackness Castle	15,179	14,716	17,624	21,556
Callendar House	30,897	35,621	28,781	47,282
Bo'ness Hippodrome	34,015*	28,957	27,602	30,220
Kinneil Museum	4,524	2,716**	3,153	3,940
Mariner Centre	228,636	217,021	180,643	240,206
The Helix	NA	NA	952,506	742,575
The Kelpie Tours	NA	NA	47,840	34,102

\* Hippodrome 100 celebrations

\*\* Please note a new system of counting was introduced in this year

This illustrates the steady growth in visitor numbers at attractions such as the Falkirk Wheel, The Bo'ness & Kinneil Railway, Blackness Castle and highlights the extent of the impact of the Helix and the success of the Kelpie Tours.

### **3. TARGETING KEY MARKETS**

#### **3.1 Visit Scotland – Joint Marketing Activity Performance/results**

##### **Summer 2015 marketing activity**

A programme of activity was developed to run in July and August 2015 to complement the Visit Scotland national campaign 'Brilliant Moments'

The campaign focussed on promoting family trips to Falkirk area attractions during the school holiday period. Call to action; win one of 5 Family Days Out in the Falkirk Area

A combination of dark posts on Facebook – (posts visible only to consumers targeted by the activity – and email to 'warm' consumer contacts. The content led with striking images of the Wheel and the Kelpies and a competition to win a break in Falkirk – The prize included accommodation at the Grange Manor Hotel, Falkirk Wheel experience, The Kelpies Tour, Bo'ness & Kinneil Railway, Xtreme Karting and Wellsfield Farm & Activity Centre.

##### **Budget**

Falkirk Council contributed £5000 to this campaign.

##### **Key results**

- |   |                |
|---|----------------|
| • Opportunities to be see/hear messages about Falkirk | <b>561,429</b> |
| • Unique visits to Falkirk Campaign Landing Page      | <b>11,648</b>  |
| • Competition entries                                 | <b>3,438</b>   |

##### **Autumn 2015 Marketing Activity**

Complementing the National Brilliant Moments campaign the Autumn/Winter campaign promoted the Falkirk area to inspire, engage and motivate potential visitors to book a break in the area. It included a mix of digital and press advertising

##### **Budget**

Falkirk Council contributed £5000 to this campaign

##### **Key Results**

- |  |                |
|--|----------------|
| • Total Opportunities to see                     | <b>831,096</b> |
| • Unique visits to Falkirk campaign landing page | <b>15,958</b>  |
| • Total prize draw entrants                      | <b>5,127</b>   |
| • Business Referrals                             | <b>59</b>      |



## **Spring 2016 Marketing Activity**

Visit Scotland launched the Spirit of Scotland campaign early February 2016 which both the Kelpies and the Falkirk Wheel featured heavily. To follow a 6 week campaign to promote Falkirk began Mid-March 2016.

The campaign included emails to warm consumer prospects leading with an image of the Kelpies and incentivised with a competition to win a break in Falkirk plus a link for more information about Falkirk. The competition included a Kelpies Tour, Falkirk Wheel, Bo'ness & Kinneil Railway, Xtreme Karting, The Howgate and Macdonald Inchyra accommodation and spa experience.

Digital banners were also used to drive traffic to the competition page. These banners target specific geographic areas and website used by the potential visitors Falkirk area are targeting.

### **Budget**

**Falkirk Council contributed £7000 to this campaign**

### **Key Results**

• Total Opportunities to see	<b>830,236</b>
• Unique visits to Falkirk campaign landing page	4,920
• Total prize draw entrants	2,813

## **3.2 Visit Scotland - Additional On-going Support**

The following illustrates the on-going promotional support being received from Visit Scotland

An image of the Kelpies was used as one of the lead advertising images in the Visit Scotland Marketing Campaign – Closer than you think - May to July 2015

One aspect of this campaign included the use of the Kelpies image in TV, Digital, outdoor and print advertising, online promotions etc targeting London, Yorkshire and North East England

### **Consumer e newsletters**

The Kelpies were used as the lead hero image in June 2015 consumer e newsletter and Fire and Light was included in Dec 2015

### **• Daily Mail Partnership**

Visit Scotland run a regular feature with Brilliant Moments holiday ideas for the UK Market – The Falkirk area was featured as follows:

- |                                |                                 |
|--------------------------------|---------------------------------|
| ○ 1 <sup>st</sup> January 2016 | Kelpies – YIAD                  |
| ○ February 2016                | Hippodrome Silent Film Festival |
| ○ March 2016                   | Callendar Estates               |

- |              |  |
|--------------|--|
| ○ April 2016 | Feature on New Visitor centre Helix Park |
| ○ April 2016 | Feature on John Muir Way                 |
| ○ May 2016   | Promotion of Cruise to Falkirk Wheel     |
| ○ May 2016   | Falkirk Fashion Week                     |
| ○ July 2016  | Zoolab/Jungle Room                       |
| ○ Sept 2016  | Generic Falkirk                          |

(The Opportunities to Be Seen per edition was 93,000)

- **Direct Mail Packs**

The Kelpies were featured in all the Brilliant Moments direct mail packs in August 2015 issued to contacts across the UK & Ireland. Following the Spirit of Scotland campaign in early 2016 a new direct mail campaign was launched featuring the Kelpies on the front cover

- **Airport Advertising**

During the summer of 2015 (1<sup>st</sup> June to 30<sup>th</sup> Sept 2015) Visitors arriving to Edinburgh Airport were welcomed by striking imagery of the Kelpies. This included eighteen two metre high images of iconic locations.

- **Spirit of Scotland Global Marketing Campaign**

A new approach to Tourism Marketing was launched in Feb 2016 with the Launch of Spirit of Scotland Campaign. Six shots of the Kelpies and The Falkirk Wheel feature in the main cut of campaign TV advert. This advert was supported with a series of 90 second films – two of which had a Falkirk Focus – one talking to Andy Scott about the Kelpies & Helix Park, the second film focussing on Tim Ford helming a barge along the Forth & Clyde Canal.

- **Social Media**

Falkirk attractions have been featured consistently in Visit Scotland consumer social media channels, supporting campaign activity. The collection of maquette photography from June 2015 attracted over 1000 likes on Facebook

- **Year of Innovation, Architecture and Design 2016**

A new video to launch the year featured images of both The Kelpies and the Falkirk Wheel and the featured prominently in all activity. This profile increased when a special cut of the Spirit of Scotland was produced with explicit reference to the theme year again featuring both The Kelpies and The Falkirk Wheel. Other marketing activity for the year included consumer e newsletters which led with images of the Kelpies and The Falkirk Wheel reaching over 1.8 million warm consumer prospects.

### **3.3 Area Promotion - Kelpies Maquettes**

The Kelpie Maquettes continue to be placed in high profile locations throughout the UK and overseas by the Growth & Investment Unit team - To date the Kelpie Maquettes have now been to:

- Scotland Week in New York
- The Grand National at Aintree
- The Royal Highland Show,
- The Ryder Cup,
- The West End Festival in Glasgow
- Edinburgh Festival
- Blair Athol Horse Trials
- Belwade Heavy Horse Centre
- The Scottish Cup Final at Hampden
- Tom Jones Concert
- Glasgow Queen Street Station
- Edinburgh Airport
- Kelso Town Centre
- Queen Margaret University
- Edinburgh University
- Royal Vet School
- Edinburgh Zoo
- International Festival of Business Liverpool
- World Towns Leadership Summit- Scottish Parliament
- Haddington Show
- EFIB Conference
- HIE anniversary new campus opening
- Kirkcudbright
- World Canals Conference \_Inverness
- Cowal Festival

Falkirk Council has a number of high profile requests for 2017 and 2018. It is intended to increase the charge to those hiring the Maquettes to ensure all costs are covered in relation to transportation and the general up keep of the Maquettes statues.

### **3.4 Visit Falkirk Pre-arrival information**

#### **Visit Falkirk Website – [www.visitfalkirk.com](http://www.visitfalkirk.com)**

Since launch it has had 74,409 unique Visitors and 168,093 page views

#### **Visit Falkirk Facebook Page**

Now has 9206 likes, a series of successful giveaways were co-ordinated over the summer reaching over 50,000 per week.

Most successful post – The Kelpies lighting red for Armistice day which was liked by just under 3000 people and had a total reach of over 160,000

#### **Visit Falkirk Twitter Feed**

This now has 1,411 followers

#### **Visit Falkirk Instagram**

Launched in March 2016 now has 466 followers

To ensure Falkirk area businesses are digitally engaged the Visit Falkirk Team have worked with Digital Tourism Scotland and two Digital Tourism Courses were delivered. A number of Digital Tourism Courses will be delivered in partnership between Falkirk Council, Stirling Council and Clacks Council in 2017 throughout the Forth Valley area.

### **3.5 Visit Falkirk On-Arrival Information**

The Visit Falkirk Team have continued to produce the following:

Visit Falkirk Leaflet – over 100,000 distributed both locally and nationally

Visit Falkirk have worked in partnership with The Helix and a Visitor Map and Display was installed in September 2016 into the Visitor centre to provide visitors an easy to use guide to the area's other attractions.

Visit Falkirk have worked in partnership with the Howgate shopping Centre who have now passed Visit Scotland Quality Assurance and will be providing Tourist information from within the centre alongside a Visitor Map.

As no funding was available to continue the Loop service – the Visit Falkirk Team have produced on arrival posters situated within each pink bus stop to provide visitors with information as to how to get to additional Tourist Attractions.

### **3.5 Visit Scotland Expo**

The Visit Falkirk Team exhibited at Visit Scotland Expo in Edinburgh 2016 and received The Best Destination Award. 2016 saw an increase in participation and the Visit Falkirk team included Falkirk Community Trust, Falkirk Delivers, Boness and Kinneil Railway, the Falkirk Wheel, Mannerstons Café, Xtreme

Karting and Macdonald Inchyra Hotel. The Jungle Room were also represented as a last minute addition.

### **3.6 Cruiseforth**

Falkirk Council have contributed £1000 to Cruiseforth – a partnership initiative to promote Tourist Attractions within a 90 minute drive from the ports of Rosyth, Leith, Newhaven and South Queensferry. The cruise sector is experiencing huge growth – 109 % increase in cruise calls in the River Forth in the past 7 years. Falkirk Council co-ordinated a FAM trip for 25 volunteers from Cruiseforth to Falkirk's main attractions. A FAM trip for 3 overseas travel writers was also hosted. In 2017 the number of Cruise Ships is expected to increase to 121 thus providing attractions in the Falkirk area a huge opportunity.

## **4. Providing Enjoyable and Marketable Experiences**

In 2016 the following developments have taken place to improve the tourism product offering within the Falkirk area.

- Spoke N Boot – a glamping site with 4 pods opened in September 2016
- The Wheel – a caravan site was opened for the 2016 tourist season
- The Jungle Room – a new visitor attraction opened in July 2016
- The Falkirk Wheel – undergone a £1 million refurbishment
- Development ongoing at the former Rosebank Distillery
- Refurbishment of the Falkirk Steeple