



Falkirk Council

visitfalkirk
and the surrounding area

**FALKIRK AREA
TOURISM STRATEGY
2023-2028**

JUNE 2023

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Picture credits on previous page:
The Kelpies – Scotdrone
Falkirk Distillery – Vass Media

1 INTRODUCTION

Tourism and the visitor economy is important to Falkirk. The £148m spend generated by over 800,000 visits creates and supports jobs and businesses. Beyond the economic benefits tourism enhances the image and reputation of Falkirk as a place to invest, work and live. Visitors introduce vibrancy, supporting shops, restaurants, cafes and pubs, events and other facilities. There is also, for residents, a sense of pride in a place that can attract visitors and offer a memorable experience.

Falkirk's tourism has been a success story over the past decade, stimulated in part by the unique attractions of The Kelpies and the Falkirk Wheel. This Strategy builds on the previous one launched in 2015 taking account of the successes, and the subsequent impact of the Covid19 pandemic, to chart a way forward. It draws on a robust evidence base, the views of partners, stakeholders and businesses, and the response to the current economic challenges encapsulated in local, regional and national strategies. It takes a market focus to identify where growth is likely to come from and how the sector can respond to market trends and demands.

The Strategy does not include everything that will or could be done, rather it focuses on a number of carefully chosen interventions, building on Falkirk's strengths and the market opportunity. It articulates the vision for tourism in Falkirk, identifies best prospect markets, growth areas and how the branding and marketing should develop. Priority interventions and actions are identified taking account of the likely resources available. Joint working will be key for delivery and recommendations for this are set out, along with targets and measuring progress.

In many ways this is a living document that will need to respond to circumstances and opportunities; the intention is however to set the direction of travel for productive collaboration and partnership working.



2015 Strategy Targets

Target 1: To increase visitor expenditure by 20% by 2020.

Exceeded: 28% increase

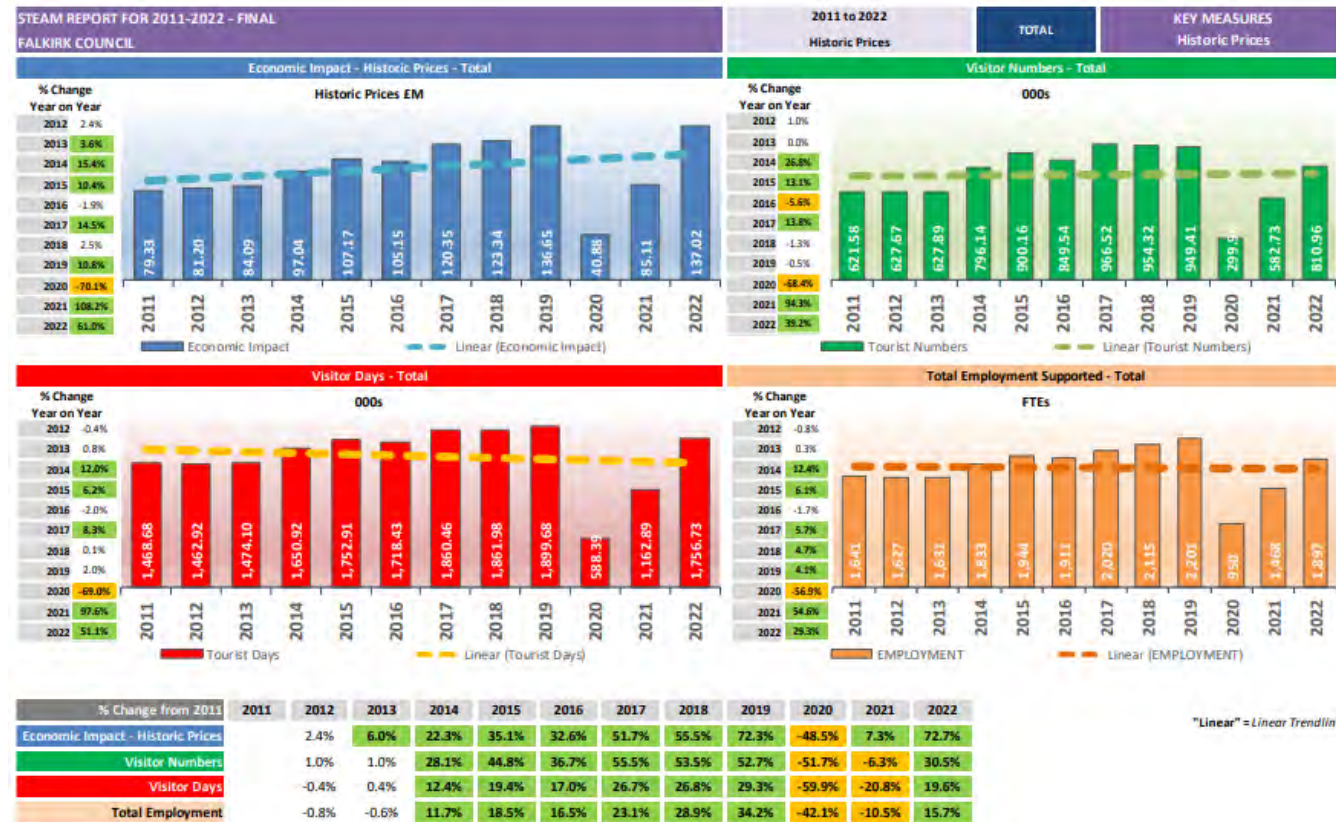
Target 2: To increase overnight visitor accommodation by 20% by 2020

Exceeded: 31% increase

2 FALKIRK NOW

Falkirk is starting from a strong foundation. This section gives an overview of the current situation and operating environment - summarising the data, strengths and weaknesses, highlights of what's on offer as well as the policy and strategic context.

The diagram on the right here provides a snapshot of the data which clearly demonstrates how important tourism is to the Falkirk Area. The key indicators of visits, value and tourism jobs were showing increases pre-pandemic, providing a strong base for recovery and growth.



Source: STEAM Economic Model 2022

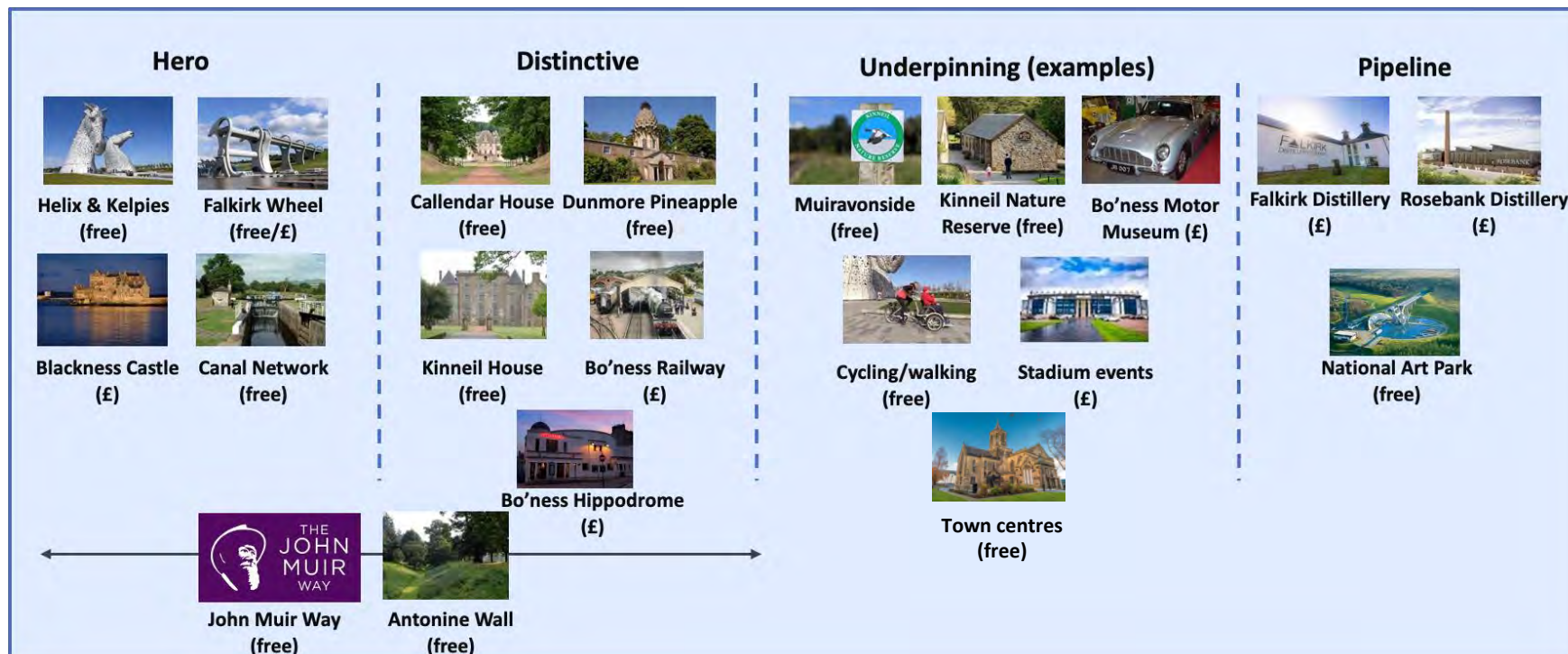
Below is a summary SWOT drawing on research and consultation. The strengths and opportunities on the left-hand side of the diagram again indicate a good base for future growth.

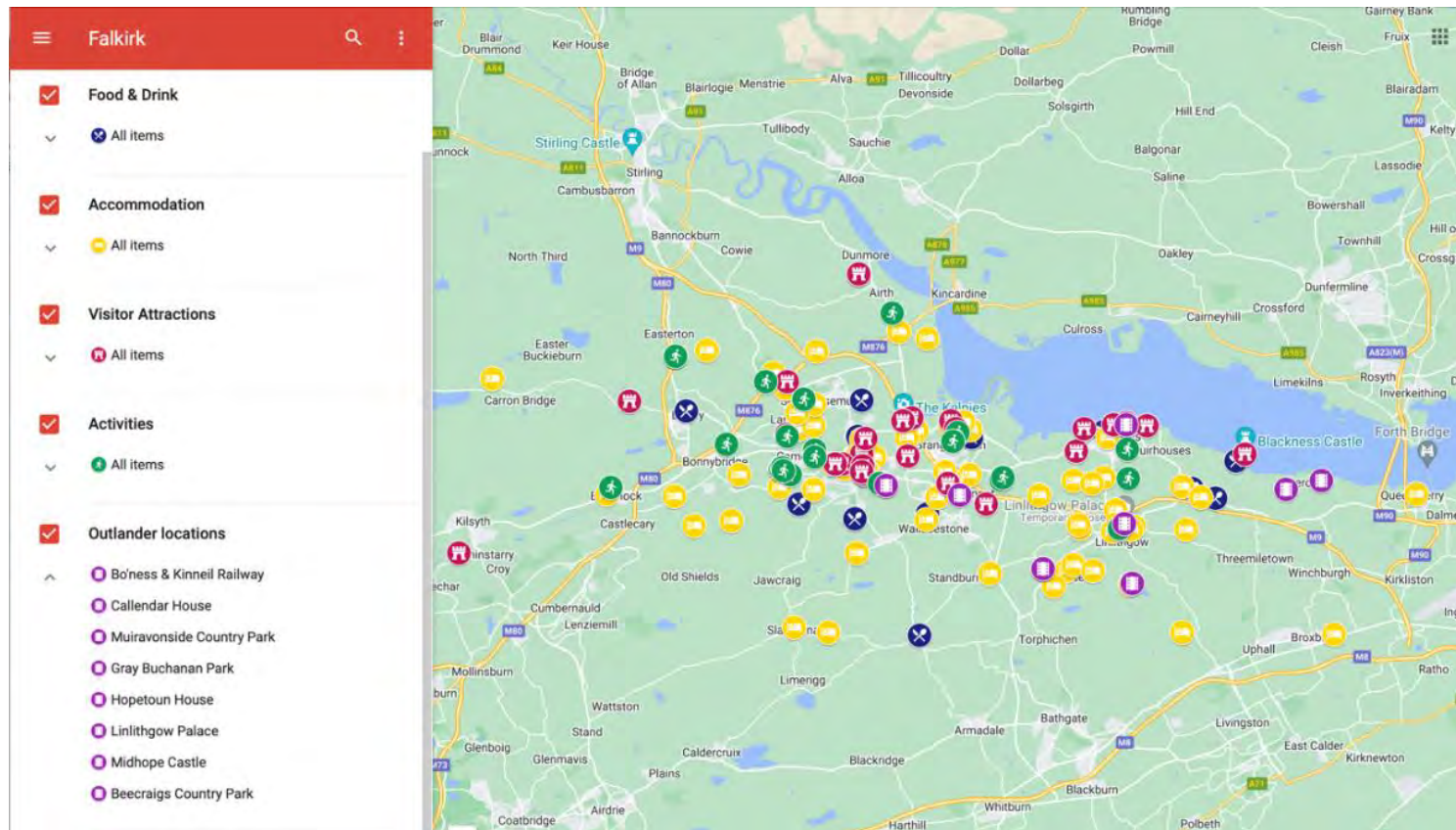
<p>STRENGTHS</p> <ul style="list-style-type: none"> • Supportive policy environment for tourism (national, regional, local) • Delivery of 2015 Tourism Strategy • The scale of pre-pandemic tourism growth – especially staying visits • Iconic attractions plus range of smaller/more local attractions • Quality of content and growth of Visit Falkirk social channels 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Lack of profile & reputation as a destination • Reliance on a few – free to visit - attractions • Lack of clarity around best prospect visitor markets – who they are, needs & motivations • Lack of quality, characterful, distinctive accommodation to support overnight stays • Underperforming Falkirk Tourism Partnership
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Levering investment - Growth Deal, City Region Deal - £43M for culture & tourism & Forth Valley Economic Strategy • Evolution of the Visit Falkirk brand – consistent, distinctive proposition & positioning targeting growth markets • A streamlined visitfalkirk.com aligned around target markets • Driving more value from day visits • Building staying visit proposition • Building business capacity and collaboration 	<p>THREATS</p> <ul style="list-style-type: none"> • Severity of impact of pandemic • Economic constraints – for visitors and businesses • Public sector resourcing & funding • Proximity to high-performing overnight destinations

WHAT'S ON OFFER

Falkirk is currently very much an attraction-based destination – visitors come for and because of specific attractions rather than other motivators such as landscape, scenery, towns and villages, culture, food & drink, retail etc.

The Falkirk area is enviably served with ‘hero’ attractions capable of drawing both international and domestic visitors in their own right. Projects in the pipeline will further reinforce reasons to visit supported by a good range of distinctive and underpinning assets providing reasons to extend a stay. It is clear however that Falkirk is dependent on free attractions so alternative ways to generate economic value will be required.





The map [here](#) plots over 60 attractions and experiences – including Outlander film locations - supported by an infrastructure of accommodation and places to eat and drink.

POLICY FRAMEWORK

At local through to national level there are strategies to align with and capitalise on, with investment in projects and programmes which will benefit Falkirk’s visitor economy. The key elements are:

- ▶ Tourism as a driver of sustainable growth and positive socio-economic change
- ▶ Supporting green transition through responsible and sustainable tourism
- ▶ Jobs and skills, green innovation, digital connectivity and culture
- ▶ Investment in attractions and infrastructure



National Strategy for Economic Transformation (2022)

Green growth, improved productivity & skills, a wellbeing economy underpinned by fair work. Acknowledges “our food and drink, our creative industries and our major events and tourism offer... are in demand across the world”



Scotland Outlook 2030: Responsible Tourism for a Sustainable Future (2020)

A vision for Scotland as a world leader in 21st Century tourism and a mission to enrich the lives of everyone who visits, lives in and works in Scotland via responsible tourism



Falkirk Council Economic Strategy (2015)

10 year strategy to create a “smarter, more sustainable economy which offers opportunities for all”. Tourism an agent for growth by building on success of key attractions.



Falkirk Growth Deal (2021-31)

£131m investment, including £21m for a sustainable transport hub at Grahamston Station, £4m for a relocated Scottish Canals HQ, £3m for the National Art Park along the Forth & Clyde canal



Stirling & Clackmannanshire City Region Deal (2020)

£214m to support higher value jobs, green innovation, digital entrepreneurship and culture. Includes £15m for culture and tourism which will support Forth Valley proposition



Falkirk Local Development Plan 2 (2020-40)

By 2040, Falkirk “will be one of the top visitor destinations in Scotland, with a fully integrated network of attractions... and supporting infrastructure. A regenerated canal corridor will sit at its heart.”



Falkirk Council Plan (2022-27)

A plan to transform services and make savings of £69m+ by 2027. A key priority is to support a thriving economy and green transition, with tourism as a major contributor



Forth Valley Economic Strategy (Draft 2023)

The focus for tourism is on building a holistic and sustainable visitor economy encouraging longer stays through a Forth Valley offer. References creation of a Forth Valley Tourism Delivery Group. Walking & cycling seen as an opportunity and lack of accommodation as a constraint

3 STRATEGIC APPROACH

VISION

The ambition is for the Falkirk area to be a coherent visitor destination taking its place among Scotland's best. Through leveraging the area's iconic attractions and visitor experiences, tourism will contribute to Falkirk's success, its prosperity and its reputation as a great place to live and do business, as well as to visit.

STATEMENT OF INTENT

The vision and strategy are driven by a shared statement of intent articulated here.

Falkirk, and the surrounding area, have seen considerable success over the past decade stimulated by our iconic attractions - The Kelpies and the Falkirk Wheel. Looking forward we want to build on that success. To achieve the economic and social benefits tourism brings – successful and profitable businesses, good quality jobs and careers, vibrant towns and villages – we will focus on giving people more reasons to visits, more encouragement to stay longer and more opportunities to spend.

Our aim is to focus on those things that attract visitors - and encourage investment in existing, new and enhanced attractions and experiences. We also need to create and support the conditions for our visitor economy to flourish. And of course, we must raise awareness and interest among those people most likely to visit.

We can only achieve this if we work in constructive partnership – locally, regionally and nationally. We have to be innovative and creative in making sure policies and funding programmes will benefit the visitor economy. It's particularly important we work in partnership on climate issues ensuring Falkirk is an exemplar of responsible tourism.



4 TARGET MARKETS

Target markets and segments have been selected on the basis of those visitor types which are most likely to extend their stays and spend more.

This draws on research by VisitScotland and VisitBritain, analysis of market trends and an interrogation of those visitor types most likely to be attracted to Falkirk, extend their stays and spend more. It also draws on market trends, summarised here, which should also inform the messaging (and channels) used in promotion.

For some of these segments the offer is already strong in Falkirk, and it is a case of packaging it and marketing it to them in a more targeted way. For others, their growth potential lies in the development of the experience, driving visits, longer stays and impact over time.







There are six target markets in all - three domestic leisure segments likely to stay longer, and three with growth opportunities - an international segment, a business tourism segment, and those visiting friends and relatives. The domestic segments are based on VisitScotland's research which will shortly be updated, and Falkirk's priorities should be reviewed accordingly.

Tour groups, including cruise visitors arriving in the Forth or at Greenock, provide a significant opportunity for Falkirk because of its strength in attractions. Such visitors are included in the segment types below but will be reached through the travel trade and cruise operators and intermediaries. As for all visitor segments the key to success will be providing opportunities to spend, through encouraging longer visits and paid-for activities.

Those visiting friends and relatives present an interesting opportunity. While generally lower value (because of free accommodation) they will spend on activities, attractions and eating out. Informed and knowledgeable residents who act as 'ambassadors' for the area will encourage both visits and spend, as well as nurturing civic pride.

Key Market Trends for Falkirk

- Cost of living crisis – appeal of close to home and free/low-cost activities
- Activity, health and well-being – in the outdoors
- Appeal of less visited/undiscovered places
- Accelerating use of digital – for visitor experience and business operation
- Coherent and visible approach to tackling climate challenges

SEGMENT	WHO THEY ARE AND WHAT THEY WANT	TRIP TYPE	SEGMENT	WHO THEY ARE AND WHAT THEY WANT	TRIP TYPE
<p>Adventure Seekers</p> 	<p>Typically under 35, many travelling with children. Relatively affluent. Predominantly English. Looking for outdoor, active and culture. Keen to try new things and get off the beaten track.</p>	<p>Days out – from home or staying elsewhere. Short breaks and longer holidays.</p>	<p>International Explorers</p> 	<p>Typically 45+ travelling without children. Mid- affluence. Overseas trips a priority. Like relaxed pace. Looking for sightseeing, heritage, culture, nature. Local food & drink.</p>	<p>Leisure breaks. Tour groups. Cruise.</p>
<p>Engaged Sightseers</p> 	<p>Typically older 55+. Predominantly English. Mid-affluence. Take numerous breaks. Interested in general sightseeing and touring, history, scenery. Accessibility important.</p>	<p>Days out – from home or staying elsewhere. Short breaks and longer holidays. Tour groups. Cruise.</p>	<p>Visiting Friends & Relatives</p> 	<p>Local links – from the area or friends or relations living here. Looking for social time together. Attractions, activities, events. Eating out.</p>	<p>Short and long breaks. Days out.</p>
<p>Natural Advocates</p> 	<p>Middle aged, mid-affluence. Generally travel in couples. Typically Scottish. Passionate about Scotland – frequent break takers. Looking for peace and quiet, gentle outdoors experiences. Avoid rigid plans.</p>	<p>Leisure breaks.</p>	<p>Business Travellers</p> 	<p>Non-discretionary business meetings. Corporate meetings and events. Driven by local business and sectors. Freeport opportunities.</p>	<p>Extended stays post-business. Repeat leisure visits with family/friends.</p>

5 AREAS FOR ACTION

The Strategy has four priority areas over the next five years. These have been carefully selected to achieve the ambitions set out earlier, taking account of market opportunities and the likely resources available. It should, however, be treated as a 'live' plan and there may well be refinements and revisions in response to opportunities and constraints which emerge over the coming months and years.

ACTION AREA 1: BUILDING UP THE ATTRACTORS

The Falkirk area has some of Scotland's best-known attractions. The primary opportunity for growth lies in capitalising on and making more of existing, new and planned attractions. This will include the development of new or enhanced experiences at those attractions. Taken as a whole, these will provide many new reasons to visit and a wide range of reasons to stay longer resulting in greater spend.

ACTION AREA 2: AMPLIFYING DESTINATION BRANDING

The visualisation of the Visit Falkirk brand – yellow on vibrant pink – was introduced in 2014. The colours and style are somewhat dated now – a view confirmed in the consultation undertaken in developing this Strategy. The launch of the Strategy presents an opportunity to refresh and update the brand, taking advantage of where the strengths and distinctiveness are to help support the development of Falkirk as a destination. This brand refresh should include a narrative articulating Falkirk as a destination and a new visualisation of the brand for use by partners and stakeholders.

ACTION AREA 3: ENABLING SUCCESS

This action area focuses on those elements required or desirable for the ongoing success of the sector – accommodation provision to encourage overnight stays and spend, business support, consideration of a Tourism Business Improvement District (TBID) and how the climate challenge facing the sector should be addressed.

ACTION AREA 4: DELIVERING THROUGH PARTNERSHIP

A successful visitor economy involves many players, and this Strategy will rely on effective partnerships operating locally, regionally and nationally aligning effort and resources behind a common cause. Structures to enable this are essential, and the leadership of Falkirk Council will be key.

The following pages give more detail on specific actions for each of these areas.

ACTION AREA 1: BUILDING UP THE ATTRACTORS	
<p>Six attractors capable of extending the offer, driving visits and longer stays will be the focus for action and support.</p> <p>Some of this will be the implementation of existing plans and proposals, while others are concerned with revitalising or extending the opportunity around existing assets.</p>	<p>Blackness Castle – a development plan has been produced to ensure this important heritage attraction can effectively capitalise on its popularity (including as an Outlander film location) while managing the flows of visitors to the castle and Blackness village. Implementation of the plan is the next stage.</p>
	<p>Scotland’s National Outdoor Art Park – already at concept stage the proposal is to develop an art ‘trail’ along the Forth & Clyde Canal between the Falkirk Wheel and The Kelpies capitalising on the area’s iconic attractions.</p>
	<p>Callendar House – an imperative is revitalising and modernising the exhibitions within Callendar House and addressing maintenance issues of the building fabric.</p>
	<p>Antonine Wall – working with partners – Historic Environment Scotland and local authorities - capitalise on the fame and world heritage site status of the Wall through developing innovative new visitor experiences based on storytelling.</p>
	<p>Activities – developing and promoting the walking and cycling offer will extend Falkirk’s offer – this will include good signage, surfaces, connectivity, information for visitors etc. Develop adventure activities at Falkirk Wheel and explore opportunities at other locations including Falkirk’s parks and open spaces.</p>
	<p>Events – establish a programme of events focusing on one key event per season, with the longer term ambition of developing a signature event for Falkirk in partnership with other organisations. Capitalise on ad hoc opportunities e.g. UCI Championships Road Race (2023).</p>
ACTION AREA 2: AMPLIFYING DESTINATION BRANDING	
<p>The aim here is to build Falkirk’s reputation as a visitor destination beyond a collection of attractions, reinforcing its positioning as a place with much to offer encouraging longer stays.</p>	<p>Destination Narrative – produce ‘Falkirk’s story’ in a few hundred words capturing what is special and different; while not marketing copy it will inform messaging about the place and ensure a coherent positioning of Falkirk.</p>
	<p>Visualisation – updating the brand device and look and feel of marketing communications taking advantage of the area’s most famous attraction – The Kelpies – including review of colour palette e.g.reflecting the silvers and blues of the Kelpies, the Wheel and the canals. Consideration of how to accommodate the surrounding area to Falkirk town in the brand device/visualisation – or a strapline - will be part of this.</p>
	<p>Toolkit – the narrative and visualisation, how to use them, video and images, copy examples etc will be brought together in a toolkit of resources for tourism businesses and operators to use.</p>
	<p>Destination Marketing – the core destination marketing role will be via the visitfalkirk website and its social media channels, providing the platform to build the destination reputation and for individual operators to use. Will also include thematic activity aligning with VisitScotland priorities and opportunities e.g. accessibility, cycling etc. As well as visitor facing activity, working with the travel trade and Cruise Forth will offer additional routes to market.</p>

ACTION AREA 3: ENABLING SUCCESS	
<p>There are many things that contribute towards a prosperous visitor economy, the focus here is on four areas which can make an impact over the life of the Strategy.</p>	<p>Accommodation – extending the range and quality of accommodation in the Falkirk area is essential to growing overnight stays; while this is driven by the market, capacity and gaps can be identified and opportunities actively promoted and development encouraged. Given scale it would be sensible to do the investigatory work at a regional level.</p>
	<p>Tourism BID – a Tourism BID, established and operating on the same principle as regular BIDs, would bring together the business sector with a significant and regular income stream. This is another area which could be appropriate to address at Forth Valley level because of scale.</p>
	<p>Business Support – advice, support and small grant schemes already exist (for resilience, digital development and energy efficiency), and the priority is to encourage and facilitate uptake from tourism businesses.</p>
	<p>Climate Action – complex and challenging, with action underway at national level through VisitScotland and Scottish Enterprise, this area is another to address at regional level, while the business support strand and other mechanisms can encourage businesses to take steps and signpost to available resources. Opportunities to collaborate on local and regional projects and initiatives (eg Climate Forth) should be supported.</p>
ACTION AREA 4: DELIVERY THROUGH PARTNERSHIP	
<p>Engagement across the sector and among agencies at local, regional and national level will be required to align efforts behind the Strategy and to take most advantage of the funding programmes being implemented. Falkirk Council has a key role in driving this.</p>	<p>Forth Valley Tourism Working Group - referenced in the Forth Valley Economic Strategy, a group which brings together the public agencies, including VisitScotland, will be essential in addressing strategic issues and identifying areas for collaboration such as climate action, an accommodation survey as mentioned here as well as joint-marketing to specific markets (e.g. travel trade, international, cruise) where it makes sense.</p>
	<p>Falkirk Tourism Group – at a local level a new, revitalised partnership bringing together businesses and providers will be an important forum for sharing expertise, encouraging joint-working around development and marketing.</p>
	<p>Leadership – Falkirk Council can support the delivery of the Strategy through advocacy, influence and oversight, both internally across departments – via an interdepartmental Tourism Working Group - and externally with partners at all levels. Senior level responsibility and modest operational budgets for research, feasibility etc will be required.</p>

PHASED PROGRAMME

Potential phasing of the actions is shown below. Where feasibility work is to be done in advance of any implementation, this is shown by a broken line. Refinement of the phasing will be a priority during 2023/24 following consultation and engagement with partners and stakeholders, and assessment of resources.

	2023/24	2024/25	2025/26	2026/27	2027/28
Blackness Castle	Agree implementation priorities & schedule of Blackness Development Plan with partners	Implement agreed programme			
National Outdoor Art Park	Implementation				
Callendar House	Secure funding for permanent displays development plan.	Commission, secure funding, agree programme	Implementation		
	Secure funding for conservation study & plan	Commission, secure funding, agree programme	Implementation		
Antonine Wall	Explore partnership options for Storytelling Plan	Commission Storytelling Plan for Antonine Wall	Secure funding & implementation		

Events	Audit of events & explore partnership approach. Capitalise on opportunities	Completion of Events Strategy including identification of events with tourism appeal	Partnership approach to supporting events	Feasibility of signature event	
Walking & Cycling	Audit walking & update cycling infrastructure	New information portal on visitfalkirk	Develop routes & trails – linking attractions		
Activities	Activities development at Falkirk Wheel	Identify other locations & opportunities			

	2023/24	2024/25	2025/26	2026/27	2027/28
Destination Narrative	Develop narrative & commission design brief for visualisation	Develop toolkit of resources			Refresh toolkit
Destination Marketing	Destination marketing – digital and thematic Travel trade & Cruise Forth				
Accommodation	Commission Accommodation Study	Accommodation development prospectus		Refresh prospectus	
Tourism Business Improvement District	Undertake Tourism BID feasibility	Stakeholder engagement	TBID vote	TBID set up	

Business Support	Business support – through existing programmes				
Climate Action	Identify local and regional projects for collaboration	Regional Climate Action Plan	Implementation		
Forth Valley Tourism Working Group	Establish Forth Valley Tourism Partnership				
Falkirk Tourism Group	Set terms of reference for new Falkirk Tourism Group and establish	Extend engagement			
Leadership	Establish interdepartmental group within council.	Leadership, advocacy, influence			Review Tourism Strategy

6 MONITORING PROGRESS

TARGET

While any number of targets are feasible, the primary one is economic impact measured by visitor spend, which will lead to increased prosperity, profitable businesses and jobs in the Falkirk area. Increased economic impact will come from generating more value from visitors in the Falkirk area – by growing overall visits; encouraging stays from overnight visitors and longer stays from day visitors; and creating more opportunities to spend.

Target measure	Target increase	How to measure it	Baseline*	By 2028
Economic impact from visitor expenditure	Increase visitor expenditure by 20% over the next five years	STEAM Economic Model	£148m	£178m

*All monetary values are 2023 prices.
Baseline is 2022 STEAM data inflated to 2023 using Bank of England calculator.

Additional indicators to monitor, which will assist in understanding the ‘health’ of the Tourism Economy, include: Direct Employment, Visitor Numbers, and Overnight Stays in the Falkirk area.

KEY PERFORMANCE INDICATORS

In addition to the overall target a range of indicators will monitor progress. These are shown in the table below and are grouped into those concerned with market reach and those with product development.

KPIs – What to measure	How to measure it	Description/Notes
Market Reach Indicators		
Awareness/Familiarity	Omnibus survey	Scale from: <i>'I've never heard of Falkirk before'</i> to <i>'Falkirk is a place I know very well'</i>
Past visitation	Omnibus survey	Scale from: <i>'I've never visited before'</i> to <i>'I've visited within the last XX years'</i>
Sentiment	Omnibus survey	Scale from <i>'disagree strongly'</i> to <i>'agree strongly'</i> on <i>'Falkirk is an attractive destination for people like me'</i>
Future consideration	Omnibus survey	Scale from <i>'I would never consider visiting'</i> to <i>'It's definitely a place I'd consider visiting'</i>
Product Development Indicators		
Average length of overnight stays	STEAM economic model	Total number of nights stayed divided by total number of overnight visitors
Accommodation occupancy	STR or similar	Rate based on number of available units
Accommodation revenue per available room	STR or similar	Assess alongside occupancy
Number of new-to-market visitor experiences	Periodic audit	Requires up-to-date records on number of businesses
Seasonal spread	STEAM economic model	Monitor visitor numbers and spend
Annual visits to visitor attractions	Moffat Centre Survey	Able to benchmark versus comparators



Credit: Scotlandbigpicture.com

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