

Subject: TOURISM STRATEGY – FINAL DRAFT
Meeting: EXECUTIVE
Date: 24 FEBRUARY 2015
Author: DIRECTOR OF DEVELOPMENT SERVICES

1.0 INTRODUCTION

- 1.1 The purpose of this report is to present the recommendations of the Policy Development Panel convened to help develop the Council's Tourism Strategy.
- 1.2 The Executive received an update report on the development of the Tourism Strategy in December 2014. Members agreed that further consultation should be carried out and that the strategy should be updated accordingly. A draft strategy has been prepared and is presented to the Executive for its consideration (appendix 1).

2.0 BACKGROUND

- 2.1 The preparation of the tourism strategy has been led by a Policy Development Panel (PDP). Its members are Councillor Mahoney (Chair), Councillor Paterson and Councillor G Goldie. The Opposition did not make nominations to the panel.
- 2.2 The PDP sought to develop the tourism strategy by building on the previous work of the Council in progressing its Tourism Action Plan, engaging a wide group of businesses, stakeholders and partners and establishing a strategy to give longer term direction to its activities in this important sector. The activities of the PDP to date are as follows:-
 - i) 5 August 2014 – meeting to establish the scope of activities and a timeframe for meetings.
 - ii) 27 August 2014 – meeting to examine existing research and information and to agree a survey of local tourism businesses and operators.
 - iii) 23 September 2014 - a Tourism Workshop with key external partners and agencies to consider results of the survey and identify tourism priorities for the period to 2020.
 - iv) 7 October 2014 – meeting to pull together the key findings of the survey / workshop and to set out the structure of the strategy.
 - v) 27 October 2014 – meeting with a wide range of local tourism businesses, stakeholders and operators to discuss their priorities for a tourism strategy. All members of the Council received an invitation to this meeting.
 - vi) 12 November 2014 – meeting to discuss draft strategy and consultation proposals prior to updating the Executive on 2 December 2014.
 - vii) 16 January 2015 – meeting to discuss consultation findings and the final draft strategy

- viii) 12 February 2015 – meeting to finalise the strategy for the Executive's implementation.

3.0 CONSULTATION

- 3.1 The PDP invited consultation on the draft strategy with local tourism businesses and with local and national organisations. This consultation included:-

- a survey of local tourism businesses
- a meeting with existing tourism partners
- a further meeting with local tourism operators and national organisations
- circulation of a draft strategy and receipt of comments and feedback

- 3.2 A summary of comments and feedback provided to the PDP on the draft strategy is provided in Appendix 2.

4.0 FINAL DRAFT STRATEGY

- 4.1 The draft strategy presented by the PDP to the Executive on 2 December 2014 has been amended to reflect the consultation responses. In particular the final draft strategy attached now contains key targets relating to promotion, investment and partnership. It has also included comments received from key stakeholders who have welcomed the opportunity to influence the strategy at an early stage and for it to encompass their own priorities for development. It has been possible to reflect many of these comments in the final draft of the strategy and there will be an opportunity to consider additional detail given in the responses at activity planning level.

- 4.2 The PDP agreed to forward the final draft strategy to the Executive for its consideration. Members are asked to consider the updated strategy, make any further amendments and, if agreed, approve the finalised content of the strategy. A designed document with appropriate images will then be prepared for publication.

5.0 MONITORING, REPORTING AND REVIEW

- 5.1 The strategy will be implemented over the period 2015 – 2020. It is proposed that progress reports be made to the Executive on an annual basis and that these reports should incorporate a statement of key actions for the year ahead.

- 5.2 The strategy appended to this report incorporates provision for a mid-term review in 2017. This will allow any emerging needs and opportunities to be reflected in the strategy and ensure that it remains up-to-date.

6.0 RECOMMENDATIONS

6.1 The Executive is asked to:-

- i) consider the final draft tourism strategy 2015 – 2020 as developed by the Policy Development Panel and, if agreed, approve the content for publication; and
- ii) agree the arrangements for reporting annually on tourism as outlined at Paragraph 5.1 of the report.

pp

.....
Director of Development Services

Date 13 February 2015

Contact Officer: Ian White ext 0965 / Tracey Martin ext 0967

LIST OF BACKGROUND PAPERS

None

Falkirk Area Tourism Strategy 2015 – 2020

Final Draft

Contents

Foreword

1. Tourism in Falkirk - The Current Position
2. Tourism in 2020 – Vision, Targets and Strategic Priorities
3. Delivering the Vision
4. Diagrammatic Summary (Tourism “Rocket”)
5. Monitoring and Review

FOREWORD

Welcome to Tourism Falkirk 2020 - our five year plan to grow and develop tourism across Falkirk district.

In recent years the area has firmly made its mark on the international tourism map with the arrival of the Falkirk Wheel and iconic Kelpies.

We've also seen great investment by the private sector: in new hotels, venues and attractions.

This plan aims to build on the success to date, and to make Falkirk "a destination of first choice for high quality, value for money and world-class attractions -offering memorable customer experience, delivered by skilled and passionate people."

The strategy sets out a framework how we'll achieve this vision and gives some tough but, I hope, achievable targets to make a real difference to the local economy.

The plan has been developed by the Council and its partners in conjunction with local tourism businesses, national stakeholders and local communities. I'd like to thank everyone who has contributed to the shaping of the strategy.

Now let's all work together to achieve our ambitions . . . and make the Falkirk area an amazing place to visit.

Councillor Adrian Mahoney

Portfolio holder for Culture, Leisure and Tourism - Falkirk Council

1. TOURISM IN FALKIRK – THE CURRENT POSITION

Context

In the past 20 years, the Falkirk area has seen dramatic developments which have transformed its landscape and economy. These include the Falkirk Wheel, Callendar House in Falkirk, Bo'ness & Kinneil Railway, the Hippodrome in Bo'ness and the Helix in Falkirk, all of which have had major impact on the social, cultural and economic future of the area and which continue to bring a wealth of opportunities to increase tourism.

There has been a parallel effort, through My Future's in Falkirk and other collaborative marketing with tourism partners, to raise the profile of Falkirk as an area for tourism and economic development opportunities. Much progress has been made in shifting the perception of Falkirk in a positive way, including the development of a Visit Falkirk logo and brand building activities. Falkirk is truly in the tourism business.

In recent years, the Council, in consultation with strategic partners, has drawn up an annual Tourism Action Plan. Major pieces of work have been undertaken including two VisitScotland Growth Fund campaigns and the promotion of the Falkirk area at VisitScotland Expo. Visit Falkirk is now a strong and recognisable brand for activities.

The scale of investment in tourism to date, most recently the opening of Helix Park and the Kelpies, has created much further potential and opportunities which can best be addressed by longer-term planning. The Tourism Strategy aims to set out what Falkirk wants to achieve over the next 5 years and establishes the priorities to deliver the vision.

Existing Strategies

Tourism is already guided by a wide range of existing strategies and policies which support economic development and tourism in the Falkirk area.

The national and local strategies relevant to tourism include the following.

National Strategies

- Tourism Scotland 2020 (Scottish Tourism Alliance)

This suggests that tourism players should be aligning with the Tourism Scotland 2020 strategy to ensure "each and every one of us within the industry rallies round the strategy, embracing the common agenda it sets out, giving it our full support and taking the initiative in our own areas".

- National Tourism Development Framework (VisitScotland)

Falkirk Area Policies and Strategies

- Strategic Community Plan 2010 – 2015 (Falkirk Community Planning Partnership)
- Single Outcome Agreement (Falkirk Community Planning Partnership)
- My Future's in Falkirk, The Way Forward (Falkirk Council)
- Tourism Action Plan 2014 (Falkirk Council)
- Tourist Signs Policy (Falkirk Council)
- Development Plans (Falkirk Council)
- Towards 2020, Falkirk Council's European Strategy
- Local Transport Strategy (Falkirk Council)

- Litter Strategy (Falkirk Council)
- Sustainable Falkirk Strategy and Action Plan (Falkirk Council)
- Open Space Strategy and Parks Development Plan (under development, Falkirk Council)
- Culture and Sports Strategy 2014 -2024 (Falkirk Community Trust)
- Kinneil Estate Masterplan (Falkirk Community Trust)
- Antonine Wall Management Plan 2014 -19 (Historic Scotland)
- LEADER European Funding Programme 2014 – 2020 (under development)
- Falkirk Delivers Business Plan

Strategic Partners

The delivery of the Tourism Strategy will rely on the Council working closely with key strategic partners such as those listed below.

- Falkirk Community Trust – a not-for-profit organisation responsible for the management and operation of leisure, culture, sport and tourism attractions throughout the Falkirk area.
- Falkirk Delivers – provider of town centre management services in Falkirk, Bo’ness, Stenhousemuir, Denny and Grangemouth. Includes a Business Improvement District for Falkirk Town Centre.
- Business Gateway Falkirk – provider of business support and financial assistance to start up and existing businesses throughout the Falkirk area, based within Falkirk Council.
- Scottish Canals - working to deliver the Scottish Government’s strategic objectives for public benefit - for everyone who lives, works or plays along the Scottish canals.
- VisitScotland - the national tourism agency for Scotland working with key partners throughout Scotland to integrate the key priorities of marketing, quality assurance and providing information and inspiration to visitors within local tourism and economic strategies in alignment with Tourism 2020.
- Scottish Tourism Alliance - brings public and private players together, to encourage the voicing of opinion about problems, priorities and solutions and collaborates with government and agencies on industry’s behalf – to improve political and public commitment to tourism.
- Scottish Enterprise – identifies and exploits opportunities for Scotland’s economic growth by supporting Scottish companies to compete, helping to build globally competitive sectors, attracting new investment and creating a world class business environment. Tourism is a key sector for Scottish Enterprise activities.
- Scottish Railway Preservation Society – dedicated to the advancement of Scottish railway heritage and operators of the Bo’ness & Kinneil Railway.
- Historic Scotland – directly responsible to Scottish Ministers for safeguarding the nation’s historic environment including the Antonine Wall and promoting its understanding and enjoyment.
- Scottish Natural Heritage – responsible for the care and improvement of the natural heritage, helps people enjoy it responsibly, enables greater understanding and awareness of it, promotes its sustainable use, now and for future generations and the lead partner for the John Muir Way.
- Forth Valley College - Scotland's first regional College, delivering more than 750 courses from its campuses in Alloa, Falkirk and Stirling. The college currently has over 1600 students studying business and tourism related subjects, making it an important contributor of tourism skills to local tourism businesses.

Falkirk Council and many strategic partners have already undertaken significant joint working under the 'Visit Falkirk' banner for promotional activities and projects.

There is a need to develop and harness plans which facilitate the continuing growth and development of tourism and maximise its impact. The Falkirk Area Tourism Strategy should articulate a vision for tourism for the period to 2020. It should also create the basis for more partnership and collaborative working to maximise visitor numbers and spend and to maximise future business investment in tourism.

Recent Tourism Performance

The key measures of tourism performance are the number of visitors to an area and the expenditure of visitors in an area. The best available current estimates are as follows.

Volume and Value of Tourism in the Falkirk area

Year	2009	2010	2011	2012
Visitor Numbers (000s)	620.48	628.04	621.58	627.67
Visitor Expenditure	£72.70m	£76.23m	£79.33m	£81.20m

Source: Scottish Tourism Economic Activity Monitor (STEAM)

There is already evidence of tourism in Falkirk taking a significant leap in 2014. With over half a million visits to Helix Park, the 'Kelpie effect' has helped other sites such as the Falkirk Wheel and the VisitScotland Information Centre at the Falkirk Wheel show a significant rise in numbers.

The difficulty of estimating the volume and value of tourism at a local level is widely acknowledged. Falkirk Council, along with VisitScotland and other local authorities, are now moving towards a new system which aims to improve the reliability of local tourism statistics. This system will report on the volume and value of tourism from 2013 onwards. 2014 will be used as the base year for measuring the progress of the Tourism Strategy in the years up to 2020.

Tourism has an impact across the wider economy. While much visitor expenditure is in sectors such as accommodation, food and drink and travel, these businesses are supplied by many other trades throughout the area and beyond. The national tourism strategy stresses that tourism is everyone's business.

Tourism Research and Information

Information from surveys of visitors has been gathered by various tourism operators and much of this has been considered in writing this strategy. There is a need to plan further research which will support the increased aspirations for tourism in the area.

Visitor research conducted by Falkirk Council at the Falkirk Wheel in 2012 gives an indication of this visitor market and some of the findings are detailed below.

- 57% of visitors were from Scotland and lived outside the Falkirk area, 26% were from England and 17% were foreign visitors.
- 40% were aged 45-64, 36% were aged 25-44, 5% were 16-24 and 16% were over 65.
- 60% of the visitors were staying in hotels, 30% were staying with friends and family and 10% were in self-catering accommodation.

- 45% were day trip visitors, 11% were away from home 1-3 nights, 31% were away from home 4-7 nights and 13% were staying away for more than 7 nights.

Some further insight from other visitor studies is noted below.

- Peer-to-peer reviews have become increasingly important in recent years, to the extent that half of travellers will not book a stay before consulting an online review site. A study claimed that up to 87% of the 2,000 hotel review readers questioned said the reviews had a 'significant influence on their purchase decisions'.
- 95% of visitors to the Helix thought the park was either 'amazing' or 'quite good'.
- 50% of visitors to Bo'ness & Kinneil Railway heard about it by word of mouth and 37% through social media/internet. 98% said it was good value for money.
- Only 8% of those with access needs use a wheelchair, so it is not always about door widths, ramps and lifts. Far more people are partially sighted than blind. Far more people have a hearing impairment than are deaf. Tourism businesses with improved accessibility appeal to a wider range of visitors.

There is a need to build and sustain research and information to improve understanding of tourism's importance to the Falkirk area.

SWOT Analysis

At a Tourism Strategy consultation meeting in November 2014, the tourism trade representatives identified the Falkirk area's tourism Strengths, Weaknesses, Opportunities and Threats. This SWOT analysis notes peoples' perceptions and some issues have already been addressed.

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Major and fresh attractions and events • Heritage, including World Heritage Sites • Family activities • Recent growth in outdoor activities and facilities • Countryside, landscape and outdoor activities • Events • Traditional High Street / historic town centres • Strong retail offer at Central Retail Park • Stock of affordable accommodation • Key attractions have collaborated on major marketing projects using Visit Falkirk brand • Business engagement and support services • Developer interest in self-catering (though yet to fully materialise) • Central location / rail access from Glasgow and Edinburgh 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Negative perceptions of industrial area • Lack of awareness in key markets • Inconsistencies in quality of service • Connections between visitor locations, including town centres and railway stations • Lack of tourism trade association or destination marketing / management organisation • No recent hotel development • No bespoke tourism website for Falkirk • Lack of major investment in town centre shopping • Lack of clarity on target markets • Lack of comprehensive tourism trade group
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Investment in facilities which tie in with Helix and other attractions – e.g. hotels, self-catering including caravan and camping sites, food and beverage service • Relatively untapped aspects of heritage (e.g. Roman, industrial) • Arts • Outdoor activities • First choice family destination for days out • Destination for groups and leisure breaks • Business buy-in to tourism group • Online marketing including tourism website and social media • Improving the built environment (e.g. Townscape Heritage Initiative) • Introduction of a local food and drink network • Raising awareness of local food and drink producers • Raising awareness of greenspace • Redefining Falkirk position as <i>Scotland's Contemporary Landscape</i> • Improved public transport and enhancement of the core path network. • Digital connectivity and wi-fi at attractions and other locations • Improved visitor information, including digital displays, at key visitor sites and town centres • Improved customer service – e.g. Glasgow Games model, including volunteer ambassadors • Better research to inform tourism activities • Potential to work with adjacent local authorities e.g. West Lothian and Stirling • Build on William Wallace connection 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Tourism is vulnerable to economic shocks • Fragmented industry may fail to seize collective opportunities • Reduced resources (public sector) • The pace of private sector development may not keep up with the area's aspirations • Other areas may shout louder • Leakage of retail spend to other centres and online

In summary, the Falkirk area has many strengths and opportunities and a changing tourism landscape as the economy diversifies from its previous concentration of heavy industry and as the area becomes a greener more attractive place to visit. With the changing perceptions of the Falkirk area, comes the opportunity to increase awareness of its tourism offering.

2. TOURISM IN 2020 – VISION, TARGETS AND STRATEGIC PRIORITIES

Vision

To make Falkirk a destination of first choice for high quality, value for money and world-class attractions offering memorable customer experience, delivered by skilled and passionate people.

The vision, targets and strategic priorities have been developed through extensive consultation with many key stakeholders and tourism businesses. Consultation has included the following.

- Issuing a survey to local tourism businesses.
- A consultation workshop bringing together existing tourism partners, including VisitScotland, Falkirk Delivers, Falkirk Community Trust, Scottish Canals, Scottish Railway Preservation Society and Falkirk Council representatives from Economic Development, Planning, Communications, Governance and other services.
- A further meeting with local tourism businesses and national agencies including Scottish Tourism Alliance, VisitScotland, accommodation providers, attractions operators, restaurants, transport representatives and community councils.

Targets

To increase visitor expenditure in the Falkirk area by 20% over the next five years to 2020.

To increase overnight visitor accommodation (serviced bedrooms and self-catering units) in the Falkirk area by 20% over the next five years to 2020.

To develop a Falkirk Tourism Partnership to take ownership of, to review and to implement the strategy.

Strategic Priorities

The vision and the targets will be delivered through the three strategic priorities identified below.

- Targeting key markets
- Providing enjoyable and marketable experiences
- Improving the customer journey

Targeting Key Markets

As existing tourism operations cover a wide spectrum – e.g. accommodation, food and beverage, visitor attractions, events, conferences, retail and transport – it follows that key markets vary between sectors. Markets also vary within sectors, for example a large hotel and a self catering operation are likely to target different sets of customers. The strategy must address the range of key markets relating to all the local tourism industry.

The use of the Visit Falkirk brand and its further development are seen as key in future marketing activities. There is a need to develop and promote clear brand values and create differentiation from other areas.

Despite the range of provision, recent consultation has shown that most local operators concentrate on one or more of the following broad markets.

- Family days out
- Older people days out
- Leisure breaks for couples and families
- Activity seekers
- Group travel
- Business tourism

The purpose of targeting markets for the area as a whole is to show where collaborative arrangements and pan-area organisations such as the Council and VisitScotland can best direct their effort for local impact.

Each of the identified markets is considered below.

A Great Family Day Out

This audience is considered by many operators to be a key opportunity. Families are drawn to attractions such as Helix Park and the Kelpies, the Falkirk Wheel, Kinneil Estate and Bo'ness & Kinneil Railway. The Falkirk area has events and amenities such as Callendar Park, Muiravonside Country Park, commercial children's play centres, a dry ski slope, indoor karting, swimming, cycling, riding and museums which attract different segments of the family audience from outside the area as well as catering for the local population. All these are particularly valuable in their potential to attract repeat visitors.

The area's powerful set of assets sits within easy reach of most of Scotland's central belt population so there is a ready market on the doorstep. The family audience comprises people staying in or travelling through the central belt area and seeking activities for children and adults.

In short, Falkirk is a great family day out and, with the Kelpies and the Falkirk Wheel in particular drawing families from a considerable distance, there is an opportunity to build this audience further. The Falkirk area should be a pre-eminent destination for families.

Key actions for growing the family days out market include the following.

- Promoting the scale and breadth of family attractions and events to local and nearby audiences to encourage visits and frequent repeat visits.
- Promoting the 'power attractions' and other specialised amenities to families throughout central Scotland.
- Building the area's reputation for attracting regular repeat visits.

The promotional effort should go hand-in-hand with continuing to refresh the product and developing new family experiences in the area.

Older People Days Out

- Some older people have time and resources to make more frequent day trips and, like families, can generate return visits on a regular basis.
- Some older people tend to have a significant disposable income.
- Existing attractions have experienced significant numbers from this market segment.
- The population is ageing therefore this segment will grow.
- Increasing numbers of grandparents are key carers for pre-school children.

One of the responses to this market segment should be ensuring a high level of accessibility for older people.

Leisure Breaks for Couples and Families

- Overnight stays generate greater financial return than day visits.
- The range of products on offer now makes a Falkirk overnight visit more viable.
- The central location of the Falkirk area makes it an ideal base for touring Scotland.
- The area has hotel capacity, especially at weekends, to accommodate hotel breaks.
- The area has internationally recognised 'Must See' attractions - the Kelpies and the Falkirk Wheel.

Visitor accommodation is the backbone of the tourism industry and the accommodation operators are essential marketers for the area. The partnership elements of the strategy should assist accommodation operators to market packages of accommodation, activities and travel which are attractive to the market.

Activity Seekers

- Development of amenities and facilities, including cycling, means that the Falkirk area can now accommodate those looking for a more active break.
- Falkirk Council's award-winning paths network attracts walkers and cyclists.
- Activity seekers are a growing market which includes people of most ages and families.
- The area's central location means that Falkirk can be a base for activity seekers looking for activities within the Falkirk area and the rest of Scotland.
- The area now has the John Muir Way which has the potential to pull in overseas visitors, with American and German visitors showing particularly strong interest.

Geographically, this market is both local in central Scotland, where people appreciate the short travel time to facilities, and much more widely spread as people can be attracted to the area as part of a larger trip – e.g. walking the John Muir Way. The marketing approach should reach both audiences.

Group Travel

- A proven sector for key attractions such as the Falkirk Wheel and Callendar House.
- This sector should be a target for the Helix, the Antonine Wall and other attractions such as Boness & Kinneil Railway, which already has a group travel base.
- Group travel can be local and international, and the strategy has to reach both ends of the spectrum.
- It is beneficial to work with neighbouring local authorities to develop cross boundary packages for group operators.

- Exhibiting at VisitScotland Expo provides one important channel to target the group travel sector.

There should be co-operation between the main sites receiving groups of visitors to help reach this market more effectively and to help tour operators to package several Falkirk elements in an itinerary.

Business Tourism

- Falkirk is an important business base with many operations which have extensive international connections e.g. Ineos, Forth Ports and Alexander Dennis.
- Local accommodation providers rely heavily on the number of business visitors to the area, i.e. non- discretionary business travel.
- There are significant facilities for discretionary business travel, i.e. conferences/meetings and events.
- There is an opportunity to capture more of the discretionary spend available, particularly as the area has become known at an international level owing to attractions such as the Falkirk Wheel and the Kelpies.
- Business tourism can lead to subsequent leisure visits.

The landmark attractions can be used to help engage conference organisers at an international level. It is also important that more local conference organisers (including Services within Falkirk Council) have full area information readily available.

Providing Enjoyable and Marketable Experiences

In recent years, businesses and organisations have shown great creativity in developing new experiences which attract visitors to the Falkirk area. New assets such as the Falkirk Wheel and the Kelpies have been created and older features like the canal network and the Hippodrome have been restored and are now important tourism generators.

The Falkirk tourism experience is based not only on a growing portfolio of visitor attractions, events and activities but equally importantly on accommodation, food and other services which, along with the quality of the environment (place), form an integral part of the visitor experience. The business tourism experience also relies on most of these features.

It is a priority of the Tourism Strategy to continue to improve and expand the Falkirk tourism experience throughout the area. The main opportunities to do so include the following.

Development at Major Attractions

The most visited sites in the Falkirk area are the Falkirk Wheel and Helix Park. Especially in the latter case there is the need to complete Helix facilities with the visitor centre and address parking pressures. Furthermore, as both the Falkirk Wheel and the Helix already have large visitor numbers on site, they should be attractive locations for the development of further visitor facilities and services by both the private and public sectors.

There is development land within, or adjacent to, both sites. This makes it possible to pursue the development of the following types of facilities.

- Visitor attractions and experiences which are complementary to, and compatible with, the existing main attractions.

- The staging of events on existing event space, and the improvement of events infrastructure, including facilities for conferences and meetings.
- Hotel and self-catering including caravan and camping accommodation.
- Food and beverage provision.
- Encouraging people to extend their customer journey to neighbouring sites.

The existing visitor numbers at key sites should provide a ready clientele for many prospective developers. New developments themselves should extend the appeal of the sites and bring more visitors to the core attraction.

There are other sites at which the principle of nodal development can be followed, where additional visitor facilities can make a location more marketable and viable. The following are examples of sites with such opportunities.

- Callendar House and Park
- Kinneil House and Estate
- Falkirk and Bo'ness town centres

A nodal development policy was pursued for the restored canals under the Canal Corridor Development Framework. A similar nodal approach would be appropriate for the other linear features in the area – the Antonine Wall and the John Muir Way.

Consideration could be given to extending the range and quality of services at visitor nodes through commercial partnerships and outsourcing.

Place-making and Enhancing the Environment

The quality of the environment and a *sense of place* are key to the enjoyment of any visit. People generally make a trip to somewhere they feel is distinctive in some way. They certainly notice the surroundings when they get there.

The Falkirk area has seen a lot of place-making and regeneration in recent years. The Falkirk Wheel and canal corridor, the Helix and Bo'ness town centre are among the most notable in scale to date but there are many other examples including the Faw Kirk graveyard, nature reserves and paths networks.

At present, work is progressing on the Falkirk THI initiative and Denny town centre. These are vital for maximising the value of intrinsic assets and giving the visitor a quality experience as they travel in the area. Improved town centres will be better placed to attract retail investment and support the wide range of independent retailers which are a distinctive feature of the area and which can draw significant visitors.

Further environmental initiatives will be pursued at sites including the following.

- Portdownie (a canal-side regeneration site close to the Falkirk Wheel)
- Rosebank (a disused distillery building beside the Forth & Clyde Canal in Falkirk)
- Nature reserves and core paths network

Such work will help continue the transformation of disused industrial areas to viable uses which contribute to the quality of the visitor experience.

The Council will also develop an *Invest in Falkirk* message to pro-actively promote the area for additional investment by new and existing accommodation providers to enhance the capacity, choice and quality of serviced and unserviced (self-catering) accommodation.

Cultural and Heritage Tourism

Much of the Falkirk area's tourism product is based on culture and heritage. Lacking the dramatic scenery and large rural spaces found in the north and south of Scotland, the Falkirk area has had to create its tourism based on its people and their works past and present. Fortunately the area has seen more than sufficient human activity and drama to leave a rich heritage and to make a compelling story. Re-telling these stories and re-living the experiences is the basis of much of Falkirk's tourism product at sites such as the Antonine Wall, Callendar House, Bo'ness & Kinneil Railway, Blackness Castle, Kinneil Estate, the Forth & Clyde Canal and the Union Canal.

In recent years, Falkirk has added greatly to its tourism product through contemporary art and culture, including the innovative engineering of the Falkirk Wheel, the landmark art of the Kelpies and the Park Gallery at Callendar House.

Culture and heritage will continue to be the bedrock of the Falkirk tourism product. Key opportunities include the following.

- The Antonine Wall – the Antonine Wall Management Plan, which has been developed as a result of UNESCO World Heritage Site designation, should create a range of new visitor experiences and improve the marketability this historic feature. The transnational World Heritage Site offers opportunities for national and international partnerships.
- Callendar House and Park – previous studies have identified a variety of opportunities, including strengthening of the visitor product within the house and re-using redundant buildings in the park.
- Kinneil House and Estate – recent studies have identified ways in which the house and estate can be brought into greater use by residents and visitors.
- Two Townscape Heritage Initiatives and local conservation areas.

These and many other opportunities are likely to come up against very constrained public sector budgets. Progress is likely to be speedier if private developers / capital can be attracted to elements within future cultural and heritage tourism development projects.

Activity Tourism

- Developing tourism-related businesses along the route of the John Muir Way and at key locations adjacent to the Antonine Wall and Canals.
- Completing facilities and infrastructure including cycle trails and related developments within Callendar Estate.
- Extending the season through the provision of activities on a 'turn up and play' basis.
- Encouraging more activity operators through Business Gateway and other support agencies.

Accessible Tourism

- The UK market is ageing and it is estimated that by 2025 more than a third of the UK's population will be over 55. There is a correlation between ageing and disability in its widest sense.

- The Falkirk area should become known for its level of accessibility, for people of all ages and abilities, at its attractions and accommodation.
- Signage of accessibility facilities such as car parking is important for attractions, hotels and other sites.
- Alternative media and new technology can be used to communicate with people with differing needs.

Sustainable Tourism

- Environmental sustainability is important within the decision making process for an increasing number of visitors.
- Sustainability is an essential element in Falkirk Council policies.
- Falkirk should aim to have a majority of tourism businesses and operators meeting the Green Tourism Initiative award criteria or having other environmental credentials which help the area to promote itself as sustainable destination.

Events and Festivals

- Facilities within the Falkirk area exist for major events and festivals such as Falkirk Rocks at the Falkirk Stadium. The number and range of events, particularly those targeting high value audiences, can be increased to maximise the Falkirk area's potential.
- Events which generate a significant number of participants or attendees staying overnight are particularly valuable.
- The success of events such as the summer comedy festival *Funny in Falkirk* and the autumn Roman Week may be a model for a winter / spring traditional music festival. This opportunity could be explored with a range of partners including Falkirk and District Arts and Civic Council and local communities.
- Collaboration between events organisers to create a combined events calendar would help not only the promotion of these events but the planning of other events in order to avoid major events clashing and to ensure a good spread of events throughout the year.

The condition and cleanliness of the built and natural environment are factors underlying all types of visitor experiences.

Improving the Customer Journey

It is important that every aspect of the visitor's experience is as smooth and enjoyable as possible. This includes providing the inspiration for the visit in the first place through all the stages of customer decision making, travel, the visit itself and the level of satisfaction and how this is communicated back to the trade and other potential customers.

Opportunities to improve the customer journey are identified below.

Pre-arrival Information

- Refining the first point of engagement with the customer and developing the pro-active use of the web and social media.
- Launching and managing a high quality Visit Falkirk website which portrays the contemporary and innovative elements of the Falkirk experience as well as the area's historic features.
- Maximising the Falkirk area's representation on VisitScotland website.

- Maximising the Falkirk area's representation at VisitScotland Information Centres and Information Points outside the Falkirk area.
- Encouraging cross-marketing by local operators, transport companies and businesses so that they give information on the wider Falkirk area as a matter of course and provide a Visit Falkirk link in their promotional channels.
- Communicating with potential visitors through print, email, advertising, other marketing and PR.
- Using sample itineraries to inspire and motivate visitors.

On-arrival Information, Orientation and Signage

- Providing information at key sites including:
 - VisitScotland Information Centre in Falkirk
 - VisitScotland information points, including Bo'ness Station
 - An upgraded information service at libraries and potentially at other key locations
 - Local tourism businesses and operators and public transport hubs
 - Use of Visit Falkirk branded leaflet stands.
- Ensuring area orientation information at key points of entry and key visitor locations.
- Further developing of downloadable itineraries and self guided tours.
- Implementing and maintaining an enhanced scheme for brown tourist signs to *and between* key tourism sites and facilities.
- Ensuring finger posts and other pedestrian signage encourage visitors to make the most of their visit.
- Improving broadband coverage throughout the Falkirk area.
- Encouraging wi-fi zones/provision to ensure increased connectivity at attractions, town centres and accommodation providers.

Road and Rail Infrastructure, Public Transport and Sustainable Travel

- Working with road and rail authorities to ensure the capacity and quality of infrastructure encourages additional visitors.
- Promoting and enhancing public transport as a sustainable way to get to and around the area.
- Improving the public transport links between visitor attractions, hotels, town centres and stations, including the provision of a regular hop-on visitor tour bus.
- Improving accessibility to the core path network by enhancing links to public transport hubs and key visitor attractions.
- Developing joint ticketing offers for transport and visitor attractions.
- Ensuring ease of parking, including coach parking in town centres and at other key sites.

Outstanding Customer Service

Customer service is a way in which the Falkirk area can differentiate itself and generate a virtuous circle of good service, customer recommendations and additional visitors. A very significant commitment will be required to achieve outstanding customer service but it could produce benefits on a corresponding scale. This would not happen overnight, but it is considered viable for the Falkirk area as a whole to aim to deliver an outstanding level of customer service by 2020. This would differentiate Falkirk from other areas and ensure that the world-class attractions are matched by an equivalent level of service which will enhance the customer experience and the area's reputation.

There should be a partnership approach to the long-term development of outstanding customer service. The tools which can be used to support this aim include the following.

- 'World Host' type accreditation for customer service and local knowledge – e.g. Visit Falkirk accreditation as a badge of honour for businesses and tourism operators.
- Local ambassadors from business and the community – demonstrating that *Tourism is Everyone's Business*.
- Reaching the workforce of the future in schools and colleges and emphasising the importance of hospitality and good service.
- Business Gateway and other business support initiatives for promoting good business practices, including customer service, to new and existing businesses.
- In a recent study by the Federation of Small Businesses, 46% of tourism businesses look to Business Gateway / councils as the first port for advice and support, which confirms that Falkirk Council is in an influential position.
- The Council's Employment & Training Unit supports training and up-skilling the area's workforce.
- Familiarisation trips for the tourism trade and others, including local ambassadors, to ensure that a wide range of people who come in contact with visitors have good product knowledge.

A Visit Falkirk website, with comprehensive and up-to-date information and partner participation, will contribute to very many aspects of the customer journey.

An important part of improving the customer journey will be capturing visitor feedback, checking that the Falkirk proposition is delivering its promise and feeding this information into the further development of marketing and visitor experiences. This should be done on a continuous cycle.

3. DELIVERING THE VISION

The vision, as stated above, is *to make Falkirk a destination of first choice for high quality, value for money and world-class attractions offering memorable customer experience, delivered by skilled and passionate people.*

The vision and the targets will be achieved through three main activities.

- Forming a Falkirk Tourism Partnership which will engage with a wide spectrum of the tourism trade and which will drive and strengthen the development of the Falkirk tourism experience through collaborative working.
- Promoting the Falkirk area to existing visitors and new target markets.
- Promoting investment in tourism in the Falkirk area from both indigenous businesses and inward investors.

Partnership Working

Elevating the opportunities for partnership working will be fundamental to the success of the Tourism Strategy. There has been good joint working between some visitor attractions to date but there is now an opportunity to create an effective tourism community which connects local businesses and aids working together for the benefit of all. The success of the Tourism Strategy depends greatly on the support and leadership of a wide range of partners including private sector tourism operators, public sector agencies, transport and retail operators, the voluntary sector and local communities. Creating more joined up working in the area as a group will be far more effective than stand-alone projects.

Joint promotional activity and attendance at events as “one body” will contribute to the increased awareness of Falkirk as a whole. Increasing the participation of local businesses in VisitScotland Expo and delivering collaborative marketing campaigns will help to ensure Falkirk is perceived as having joined up offers which enhance the visitor journey. Increased exposure in the travel media, funded jointly, will have a greater impact than single organisations alone. Shared market intelligence will allow for better monitoring and evaluation, creating a sense of community through better linkages within the sector. This will allow for the exploration of opportunities to raise funding for the future.

The benefits of “Team Falkirk for Tourism” are widespread. The visitor can access joined up information and services, the area will have a more effective focus on key markets and customers and individual businesses will have an increased demand for local produce. Working together with a shared vision to create and develop what visitors want is a key step for further growth and investment in tourism.

The future of tourism is about ‘superservice’, meaning that the services on offer need to save people time, money and energy. Taking the hard work away from visitors will help ensure they choose to visit Falkirk and help maximise their dwell time here. Business owners, communities and volunteers in the area need to be convinced of this and will be encouraged to participate in training which delivers ‘superservice’. Bringing local organisations together to build confidence and knowledge can go a long way to delivering exceptional experiences every time.

A Falkirk Tourism Partnership will have the opportunity to build on existing local and national networks, agree shared aspirations and ensure that energy is harnessed and aligned towards developing the customer experience. The partnership could work towards an overall Destination Marketing or Destination Management approach. This could include planning, implementation, regular reviews and assessment of the Tourism Strategy and activities relating to the unique

natural environments, the cultural attributes and the community of interest at the heart of the Falkirk tourism destination.

The Tourism Strategy will deliver a Tourism Partnership model which works for the Falkirk area. The strategy does not prescribe the model. That will be a matter for the trade to work out with support from the Council. However many businesses are already engaged in Visit Falkirk activities and more have come forward in the strategy consultation process. Together with the Visit Falkirk marketing group of key attractions (whose activities include exhibiting at VisitScotland Expo and running a six figure Growth Fund campaign) there is a good platform for developing a wider partnership.

Promoting the Visit Falkirk Message

Resources

There will be strong pressure on public sector budgets, including Falkirk Council and Scottish Canals, and there will be a need to attract resources from wider sources such as LEADER and from the private sector.

It is a clear aim of the Tourism Strategy to act as a facilitator to engage the private sector attractions, accommodation providers, cafes, restaurants and many other types of tourism businesses within the area and to assist them with the establishment of a local Tourism Partnership. Once this is established, an effective local partnership will help raise and allocate resources to focus attention on areas which generate the greatest economic return. It is fully appreciated that each funder must receive an appropriate return on investment.

Channels

Key Objectives	Activity	Measurements
Development of Visit Falkirk tourism and social media portal.	<p>www.visitfalkirk.com will be the call to action on all future promotional tourism activity in relation to the facilities and key attractions.</p> <p>The website will be the one stop shop for information on all tourism products and events.</p> <p>Managing the Visit Falkirk Facebook page, developing a Twitter feed, continuing monthly eshots to the trade and developing an eshot for consumers.</p>	<p>Google Analytics</p> <p>Number of hits to visitfalkirk.com</p> <p>Number of likes to Visit Falkirk Facebook page and level of engagement</p> <p>Number of followers on Twitter</p> <p>Open and click through rates on ezines</p>
Ongoing development and distribution of visitor information, orientation and signage throughout and about the Falkirk area.	<p>There has been a substantial demand (almost 100% increases in 2014) for the Visit Falkirk area leaflet.</p> <p>Develop and implement a framework for the continued distribution (locally and nationally) and production of other area literature.</p> <p>Reinforce the Visit Falkirk message through signage and</p>	<p>Number of leaflets distributed</p> <p>% increase in local coverage</p> <p>% increase in national coverage</p> <p>Number of Visit Falkirk information and orientation points throughout the area</p> <p>Installation of updated and upgraded brown tourism signs</p>

	information and orientation points.	
Marketing and PR campaign development to continue to raise awareness and improve perception of the Falkirk product offer.	<p>Maximise on the marketing activity taken place to date to continue to promote the Falkirk area as a perfect day out and build on this to promote the area for short breaks.</p> <p>Focussing on key target markets-</p> <p>Family Days out 50 plus Days Out Leisure Breaks Activity Seekers Group Travel Business Tourism</p> <p>Optimise all marketing & PR opportunities for the area and work with key partners including VisitScotland.</p>	<p>Opportunities to be seen</p> <p>Voucher redemption</p> <p>Google Analytics</p> <p>Trade exhibition attendance and level of enquiries</p> <p>The number of positive reviews about the Falkirk area</p> <p>Promotional campaign outputs (visitors and spend)</p>
Conducting ongoing Market Research with existing visitors to the Falkirk area.	<p>Establish benchmark research to provide a baseline for all marketing and PR campaign development.</p> <p>Collate visitor research from key partners to provide an overall picture of the visitor experience.</p>	<p>Perception research to be commissioned</p> <p>Improvement in information sharing between tourism operators</p>

Promoting Investment in Tourism

The Falkirk area is benefitting greatly from significant investment in recent years, particularly Helix Park and the Kelpies which opened in 2014. Along with the Falkirk Wheel, other attractions and hotel development, the tourism sector has been much strengthened. However, it will be important to ensure that recent public sector investment is complemented by a higher level of private sector investment in the next 5 years in order to increase the capacity and quality of the Falkirk tourism product.

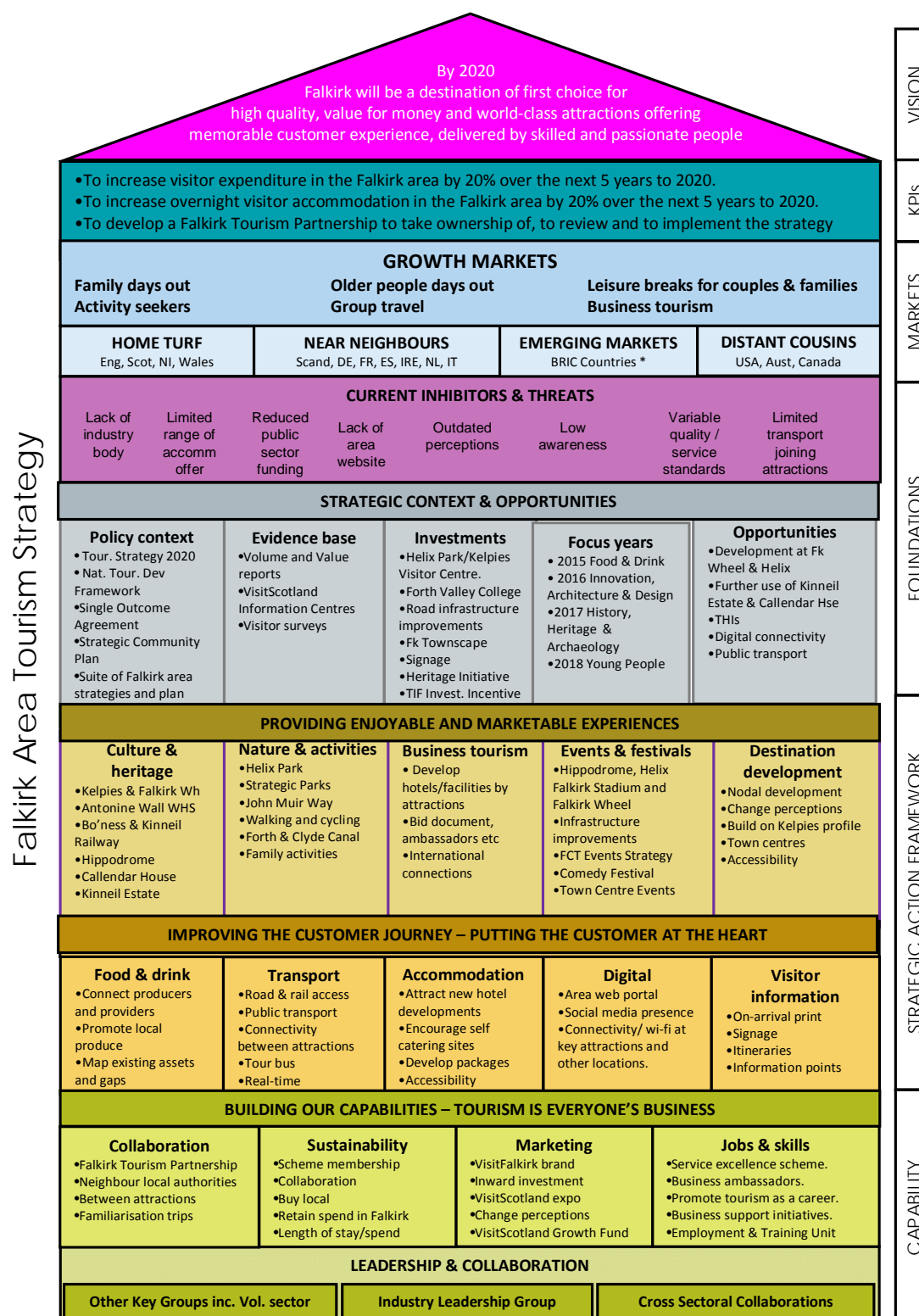
Tourism will form part of a wider *Invest in Falkirk* message which will be promoted to indigenous businesses and inward investors and will be supported by a range of mechanisms such as Falkirk's Tax Incremental Finance (TIF) initiative and the European LEADER initiative.

Key Objectives	Activity	Measurements
Inward Investment activities	<p>Promotion of the Falkirk area to attract investment in to the area across all tourism facilities, particularly additional accommodation provision, self catering including caravan and camping sites and food and beverage operators</p> <p>Ensuring an appropriate range of sites and support available for future development.</p>	<p>Production of Invest In Falkirk Promotional Materials</p> <p>Number of companies targeted</p> <p>Trade events attended</p> <p>Increase in accommodation capacity</p>
Business Engagement and	Promotion of Business Gateway	Number of tourism businesses

Support	<p>Falkirk services to Falkirk tourism businesses to encourage increased take-up of services.</p> <p>The Falkirk Council Business Gateway service has significant tourism expertise to help businesses. There is an opportunity to tailor training and support for tourism businesses according to demand.</p> <p>Realising tourism opportunities through social enterprises and community involvement.</p>	who are clients of Business Gateway Falkirk
---------	---	---

4. DIAGRAMMATIC SUMMARY

This diagrammatic summary has been prepared to illustrate the approach to and the content of the Falkirk Tourism Strategy. It follows the Tourism “Rocket” diagram developed in the national strategy, *Tourism Scotland 2020*, which has been adapted to the Falkirk area.



* Brazil, Russia, India and China

5. MONITORING AND REVIEW

The main purpose of the Tourism Strategy is to identify the high level strategic priorities and delivery mechanisms for developing the tourism industry in the Falkirk area over the next 5 years. The priorities will be addressed in many stages and by many organisations and partnerships over this period.

It is proposed that progress reports on the Strategy be made on an annual basis and that these reports should incorporate a statement of key actions for the year ahead.

While the strategy will be monitored by Falkirk Council initially, there will be continuing engagement with the tourism trade to capture its needs and reflect these in the annual plan. As a more fully fledged tourism partnership body develops, it is suggested that this body should take ownership of the tourism strategy and be the monitoring body for reporting and review.

With this in mind, it is proposed to conduct a mid-term review of the strategy in 2017 so that the partnership has the opportunity to revise the strategy to its needs at that point in time, prior to taking over ownership. It is expected that the Council would continue to play a significant role in tourism policy and development as a key partner in the partnership.

CONTACT

Enquiries about the Falkirk Area Tourism Strategy should be made to:

Falkirk Council
Development Services
Growth and Investment Unit
The Falkirk Stadium
4 Stadium Way
Falkirk
FK2 9EE

01324 590960

visitfalkirk@falkirk.gov.uk

Falkirk Council Tourism Strategy

Consultation Process

In the development of the Falkirk Tourism Strategy, the following consultative methods have been deployed to engage with as many key stakeholders and tourism businesses as possible.

- A Survey to Local tourism operators – survey issued to 112 businesses and organisations.
- A consultation/workshop with existing tourism partners - this included Visit Scotland, Falkirk Delivers, Falkirk Community Trust, Scottish Canals, SRPS, Tourism PDP Members and officers supporting tourism in various Council services.
- A further meeting with local tourism businesses, Scottish Tourism Alliance and Visit Scotland, including accommodation providers and attractions within the Falkirk area, local taxi operators, restaurants and community councils.

All those involved above then received a copy of the draft strategy for comment and the consultation was extended to other businesses and the public through the Falkirk Council website and publicised further via the Visit Falkirk Facebook page and twitter feed.

Around 20 different organisations, businesses and individuals have responded with a wide range of written comments on the draft strategy and additional meetings and discussions with some of these organisations have explored their views further. The following table provides a summary of the comments received and how the Final Draft Strategy has been amended in light of comments received.

Comments	Amendments / Response
Make reference to past joint marketing such as the VisitScotland Growth Fund and future similar activities.	Included and reference made to more joined-up working in Partnership Working section.
Include role of Social Enterprises.	Potential of Social Enterprise added to Investment in Tourism section.
Targets needed. This comment was made by many respondents.	A key section on Targets has been added after Vision.
Strategy is too widely based, should focus on 2 or 3 objectives, not try to be all things to all people. One of the objectives could be to major on events. Market segmentation show flow from the identified priorities.	The strategy already has 3 strategic priorities - markets, experiences (including events) and customer journey. It is acknowledged that within these there is wide breadth of content to reflect the breadth of local tourism operations. To narrow this down might appear to exclude parts of the local industry. However, a further prioritisation exercise may be appropriate at the strategy review stage.
Aim for high value / high spending	Reference to high value event tourists has

tourists, especially at events.	been added. It has been noted that visitors staying overnight spend much more than day visitors; events attracting staying visitors (participants or attendees) would be especially welcome.
Several references to transport links between rail and bus stations and attractions.	The Customer Journey section stresses some of the plans to improve public transport connections and First Bus has already launched a branded bus service on route 3/4 which connects the Falkirk Wheel and the Helix site.
There are some missing links in the path network / signage between High Station, Falkirk Wheel and Helix. Open space land adjacent to canal at High Station could have tourism related uses and the towpath could be promoted to train passengers going to the Wheel, possibility of “road train”.	Action on pedestrian links/ signage added to strategy, some work already planned. Other work on bus connections between stations and attractions is already included. A road train might be considered viable as tourist volumes grow.
Lack of a town centre tourist information centre and facilities at bus station.	The strategy includes the aim of providing tourist information at many more sites, including town centres and through use of IT. It would be costly to have dedicated staff at additional outlets. The number of visitors to the Falkirk information centre has increased since it was moved to the Falkirk Wheel.
Opportunity for self- conducted tours of Falkirk and Bo’ness and more seating benches alongside canal.	A range of suggested tourism itineraries has already been promoted. These are mostly based on use of car or public transport but could be extended to walking itineraries in future action plans.
Develop 2 – 7 day tourist packages.	This can be encouraged through the proposed tourism partnership and engaging the accommodation trade which is best placed to develop and promote packages.
The Falkirk business community’s considerable capacity to contribute to tourism development should be acknowledged and business support maximised through Business Gateway, rural funding etc. as well as ensuring development sites are available (e.g. for caravan, camping and mobile home parks).	Role of Business Gateway, LEADER, planning etc. has been stressed in the Investment section and reference made to supporting indigenous businesses as well as inward investors.
The intention to pursue development of additional facilities at the Falkirk Wheel and Helix sites should not be at the expense of other sites.	The intention is for development at a wide range of sites, the language used in the strategy has been amended accordingly.
Older people may be a growth sector but not all have leisure time / spending power	The section on older people days out now reflects this observation.

and many will have to work longer in life.	
Broadband connectivity is limited in parts of the area, affecting some tourism businesses.	The Council will shortly be promoting a national digital voucher scheme for businesses to improve IT, which could help address Broadband connection issues.
Accessibility to Callendar House via public transport – possible withdrawal of service to High Flats.	Council should consider advising that the bus service via Callendar Road can be used for Callendar House.
Several organisations emphasised that strategy should be formatted similar to the national tourism strategy, including a “rocket” diagrammatic summary.	Rocket diagram has been added, reflecting national strategy.
The SWOT analysis may be too lengthy and there should be an action against each of the main SWOTs.	The SWOT has been reported as developed in the trade consultation meeting and because it is not intended to represent the distilled view of the strategy, the presentation has been largely unaltered. However, a summary paragraph has been added and the priorities to address the SWOTs are articulated within the 3 Strategic Priorities section which now has an introductory paragraph to set the scene.
The choice and quality of catering facilities at main attractions could be extended by private sector investment and outsourcing.	Investment is a key part of the strategy and a reference to the option of outsourcing has been included.
More collaboration with neighbouring local authority areas.	This does take place and will be built into / strengthened in future action plans.
Identify contribution of other Falkirk Council departments, e.g. Planning, Education. Can Business Gateway have a dedicated tourism advisor?	Reference to site availability, business support and reaching the workforce of the future has been strengthened. There are several Business Gateway advisors who have very significant experience in tourism and it is felt they are very able to cover this field.
Who will own the strategy, Falkirk Council or wider industry?	The aspiration for the wider industry to take ownership has been included in the strategy. The formation of a more formal tourism partnership will be the next stage.
Business tourism is a vital element.	There is a section on Business Tourism in the Target Markets section. It is expected to become more prominent in future actions as the accommodation trade engages in the tourism partnership.
Continuing growth at The Helix and the Falkirk Wheel is vital, including use of event spaces for business as well as leisure events.	Development at these sites is reflected in the strategy and echoes other comments on the importance of events.
Maximise on the wider outdoor activity assets.	The strategy has sections on activity seekers and activity tourism experiences, and it is expected that future action plans will reflect their importance.

Include a summary of the strategy.	This has been inserted with the tourism “rocket”.
Cross selling between attractions is a high priority and the historic town centres need to be embedded alongside attractions.	The Falkirk BID action plan has considerable focus on tourism and cross-selling is expected to be taken forward by the proposed tourism partnership.
Do not lose the momentum on taking this forward.	Action on the tourism partnership should follow swiftly. Tourism businesses will be updated on the strategy and partnership etc. at an event February 2015.
Many organisations reiterated their keenness to be involved in a future tourism partnership and some highlighted their interest in working alongside specific elements such as Welcome Host, providing services and training to other businesses and helping to ensure a high level of awareness of tourism amongst their clients and stakeholders.	It is encouraging to note potential private sector leadership is beginning to emerge.