

The background of the slide features the Falkirk Council Coat of Arms. It is a shield divided into four quarters. The top-left quarter shows a castle tower. The top-right quarter shows a stag's head with antlers. The bottom-left quarter shows a sailing ship on water. The bottom-right quarter shows a lion rampant. Above the shield is a crown with four fleurs-de-lis. Below the shield is a ribbon with the motto 'A'NE FOR A'.

Agenda Item 6

Falkirk Council – Tourism Strategy 2023 - 2028

Falkirk Council

Title: Falkirk Council – Tourism Strategy 2023 - 2028
Meeting: Executive
Date: 13 June 2023
Submitted By: Director of Place Services

1. Purpose of Report

- 1.1 The purpose of this report is to present and seek approval for the Falkirk Area Tourism Strategy 2023 – 2028.
- 1.2 The recommendation of this report contributes to the strategic priorities within the 2022/27 Council Plan to support a thriving economy as the strategy will assist economic development, increase visitor numbers to stay for longer and spend more money.

2. Recommendations

- 2.1 It is recommended that Executive approve the Tourism Strategy for 2023-2028.

3. Impact on Climate Change Targets

- 3.1 The proposed Tourism Strategy will have a direct benefit on the Council's Climate Emergency Target. The strategy promotes tourism as a driver of sustainable growth and positive socio-economic change supporting green transition through responsible and sustainable tourism.
- 3.2 Climate Action is identified as an action area for enabling success over the life of the Strategy. Activity is already underway with Visit Scotland and Scottish Enterprise with tourism businesses and attractions being encouraged to adopt and market sustainable practices.
- 3.3 Activities such as developing and promoting the walking and cycling offer have been identified as a key part of revitalising active travel around existing assets. Good signage, surfaces, connectivity, and information for visitors will encourage and support these activities. Opportunities to collaborate on local and regional projects and initiatives such as Climate Forth should be supported.

4. Background

- 4.1 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. Tourism and the visitor economy is important to Falkirk. The £85m spend generated by almost 600,000 visits in 2021 created and supports a wide range of 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.'

- 4.2 Falkirk Council has been very active in supporting this sector with a wide range of marketing activities carried out to encourage visitors to stay and spend in the area. This includes promotion of themed videos through organic and paid social media activity on the VisitFalkirk channels and paid advertisement on VisitScotland social media, Giveaways, influencer visits, and publication of blogs with recommendations on things to see and do in the area have also been organised. Showcasing the area at travel trade events and working with partners and local businesses on a travel trade strategy have also formed part of the marketing activity.
- 4.3 Although Falkirk has developed significantly as a tourist destination over the last decade due to the positive impact of the Falkirk Wheel and the Helix/Kelpies, attracting visitors to the town centres will remain important. Our town centres benefit from a range of chain and independent shopping outlets, good quality accommodation, significant built heritage and is supported by local food and beverage outlets, providing significant historic and cultural value to attract visitors and aid the recovery of both the tourism and wider town centre economies.
- 4.4 The proposed strategy builds on the previous approach approved in 2015 taking into account successes, and the subsequent impact of Covid -19 to chart a way forward. It draws upon 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 identifies where growth is likely to come from and how the sector can respond to market trends and demands.
- 4.5 The 2015 Strategy set two targets, both of which were exceeded:
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.
The 2023 – 2028 Strategy builds on the success of the previous strategy and builds upon Falkirk's strengths and the market opportunity presented.
- 4.6 Tourism and the visitor economy is important to Falkirk, in 2021 £85m spend generated by nearly 600,000 visits created and supported 1,500 jobs (STEAM Economic Model 2021). Covid-19 impacted Tourism by approximately a third in 2021. Prior to Covid-19 the key indicators of visits, value and tourism jobs were showing increases providing a strong base for recovery and growth. In 2019 The Economic impact of Tourism to the economy was £137m, generated by 949,000 annual visits and supporting 2,200 jobs (STEAM Economic model 2019). Tourism grew rapidly in the Falkirk area during the 2010s - outpacing the growth in the Forth Valley.

- 4.7 Within the Council Tourism support is managed by the Economic Development Manager post within Growth, Planning and Climate Change. There is also a Marketing and Tourism Officer (funded by the UK Shared Prosperity Fund UKSPF) along with a graduate intern. The council has recently secured additional support for Tourism projects from the UKSPF which will help with the redesign and update of the Visit Falkirk website, advertising campaigns with Visit Scotland and specific promotional activity to reach wider audiences than previously achieved before.
- 4.8 The proposed strategy was developed using an external specialised tourism consultant who used a variety of methods to research, understand and include views of the tourism partners and businesses in Falkirk. These included an interactive half day tourism strategy workshop, a business survey and a series of individual consultations with key partners.

5. Falkirk Area Tourism Strategy 2023-28

- 5.1 Using the Visit Scotland Segmentation guide, the proposed Strategy identifies the following six key target markets as the most likely potential visitors to Falkirk because of their shared characteristics such as age, income, and lifestyle. These visitor profiles are more likely to be relevant for Falkirk because of the types of attractions in the local area, and are most likely to extend their stays and spend more:

Domestic leisure segments likely to stay longer:

1. Adventure seekers - under 35, with children
2. Engaged sightseers - over 55, mid affluence, accessibility important
3. Natural Advocates - middle aged, mid affluence, couples, frequent break takers

Growth opportunities:

4. International explorers - 45+, without children, mid affluence, heritage, culture, food and drink
5. Visiting relatives and friends - local link from friends/ family attractions, activities, events, social time together
6. Business Travellers - business / corporate events and meetings, Freeport opportunities

- 5.2 Areas for Action - The strategy has four priority areas over the next 5 years which have been carefully selected taking account of the market opportunities and likely resources available:

1. **Building up the attractions** – primary opportunity for growth lies in capitalising and product / service development of existing, new and planned attractions. The development of our attractions will help strengthen our position in the marketplace making us more attractive to the target audience identified above. These will prove many new reasons to visit and a wide range of reasons to stay longer resulting in greater spend.
2. **Amplifying Destination Branding** - there is an opportunity to refresh and update the Visit Falkirk visual brand assets to reflect our unique offering as well as appeal to our audiences and stakeholders.

3. **Enabling success** - this strategic action area focusses on the development tactics required for the on-going success of the sector, these include: 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.
 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 resource behind a common cause. Examples of which are the development of a TBID, and the revitalised Falkirk Tourism Partnership Structures to enable these are essential and the leadership of Falkirk Council will be key.
- 5.3 A potential Phased program of delivering the actions has been suggested and will require refinement based on consultation and engagement with partners and stakeholders, and assessment of resources.
 - 5.4 Monitoring Progress – the primary focus 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 by growing overall visits, encouraging stays from overnight visitors and longer stays from day visitors, and creating more opportunities to spend. Additional indicators will be tracked to measure our performance, and this would include: Direct Employment, Visitor Numbers and Overnight stays in the Falkirk area.
- **Target measure - Increase visitor expenditure by 20% over the next five years from £96m to £115m (baseline is STEAM 2021 data inflated to 2023 using Bank of England calculator)**

The STEAM figures for 2022 will be released in June 2023 and the 5% increase over 5 years will be reset to align with that particular figure (recognising that 2021 will have some COVID impacts), which we anticipate will be an improved position.

6. Consultation

- 6.1 The following consultation and engagement has occurred to assist with the development of the Strategy:
 - 7-24 February 2023 – Survey completed by 49 Tourism businesses.
 - 21 Feb 2023 - Tourism Strategy workshop attended by Tourism partners, businesses, Councillors, staff involved in tourism activities Falkirk BID and visitor attractions
 - Individual consultations with Scottish Canals, Cruiseforth, Visit Scotland, Falkirk Council's Cultural Services Manager, and Regeneration Co-ordinator.

7. Implications

Financial

- 7.1 The annual Tourism budget has been reduced as part of a committee review of economic development activities. This has been mitigated to some extent by accessing funding from the UK Shared Prosperity Fund (UKSPF) of £101,209, which is specifically for the redesign of the Visit Falkirk Website, and marketing campaigns. Continued efforts will be made to secure external funding and collaborate with partner organisations such as Visit Scotland, Scottish Canals and importantly the private sector to secure investment. Closer joint working with the internal Marketing / Corporate comms team in supporting the campaigns will be important in this regard.

Resources

- 7.2 Staff resources will be required to deliver the ambitions set out in the Strategy. There is a Tourism and Marketing Officer (funded by UKSPF) who is supported by a graduate intern. Closer collaboration and joint working with colleagues in the Marketing/Corporate Communications team is already underway to ensure most efficient and effective use of limited Council resources.

Legal

- 7.3 There are no legal implications or obligations arising from updating the Tourism strategy.

Risk

- 7.4 There is a risk that the target groups identified in the strategy change over time. This will be mitigated by keeping up to date with the latest Visit Scotland (VS) data / intel on visitor segmentation and close working with VS colleagues
- 7.5 There is a risk that the four priority Areas for Action don't get delivered or are too ambitious or become outdated if market conditions suddenly change. This will be mitigated by treating the strategy as a "live plan" with refinements and revisions in response to opportunities and constraints which emerge over the coming years.
- 7.6 There is a risk that the partners required to deliver the strategy, especially private sector don't engage. Falkirk Council has a strong leadership role to play and can mitigate this risk by senior level commitment, engagement and encouragement with key private sector players.
- 7.7 There is a risk that funding for Tourism support is not available after March 25 when the UKSPF has finished. This will be mitigated by looking for alternative sources of finance, and lobbying national bodies such as Visit Scotland and Scottish/ UK governments for funding support opportunities

Equalities

- 7.8 An Equality and Poverty Impact Assessment has been undertaken to ensure the strategy is robust, and that there is no potential for discrimination for groups protected by the Equalities Act 2010. The EPIA identified there is

limited negative impact on protected groups. However, Visit Falkirk along with Falkirk tourism businesses, accommodation providers, and other tourism bodies, have previously run successful campaigns aimed at promoting accessible tourism. We will continue to target this market and other protected characteristic groups with Forth Valley partners when funding opportunities arise.

8. Conclusions

- 8.1 It is recommended that The Council approves the Tourism Strategy 2023-2028 and asks officers to take forward the actions required to ensure our visitors are welcome and they continue to contribute to the wider economic benefits for the people of Falkirk.

Director of Place Services

Date: 01 Jun 2023

Contact Officer: Carron Smith, Principal Business Support Officer

Appendices:-

Appendix 1 – Falkirk Area Tourism Strategy 2023-2028
Appendix 2 – Equality & Poverty Impact Assessment

List of Background Papers:
None



FALKIRK AREA TOURISM STRATEGY 2023-2028

REPORT FOR FALKIRK COUNCIL

APRIL 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 £85m spend generated by almost 600,000 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

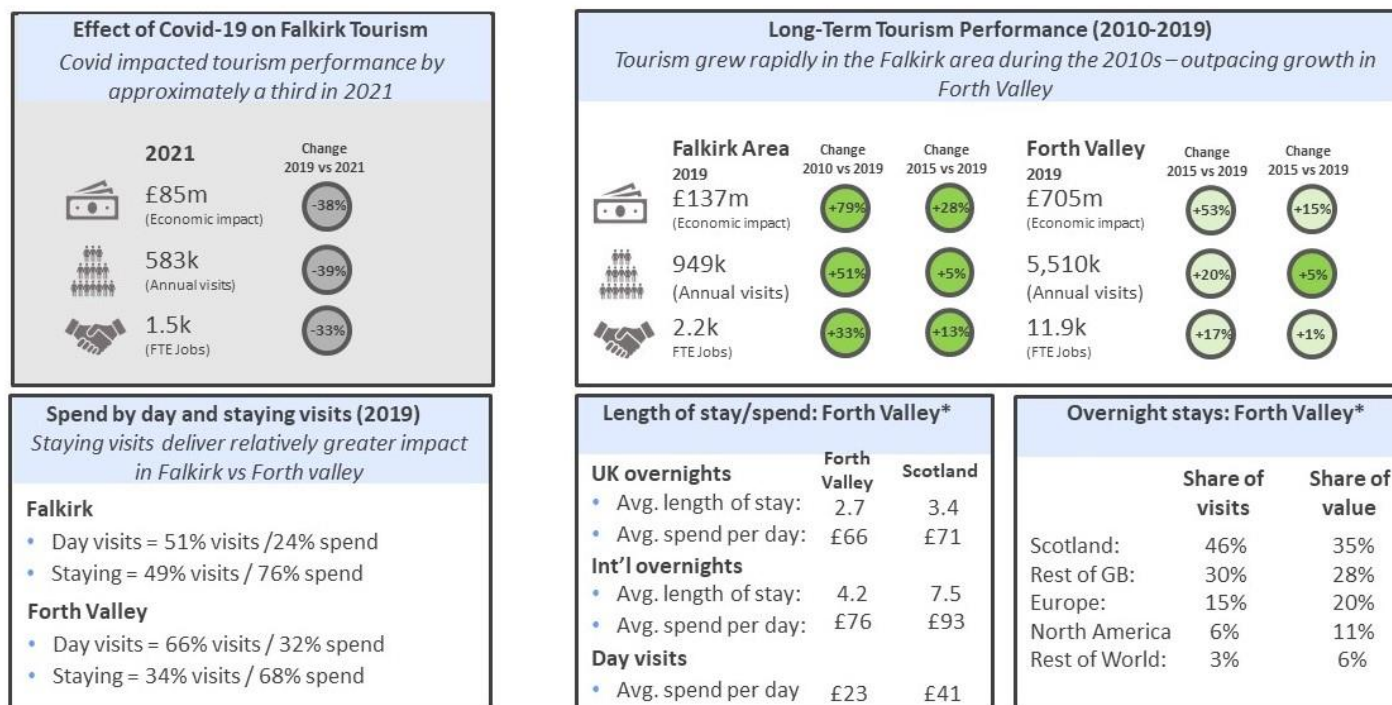
Target 2: To increase overnight visitor accommodation by 20% by 2020

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/*2019 results from Regional Factsheets 2019, Visit Scotland; GB Tourism Survey, Visit Britain; International Passenger Survey, ONS. Data available at regional level only

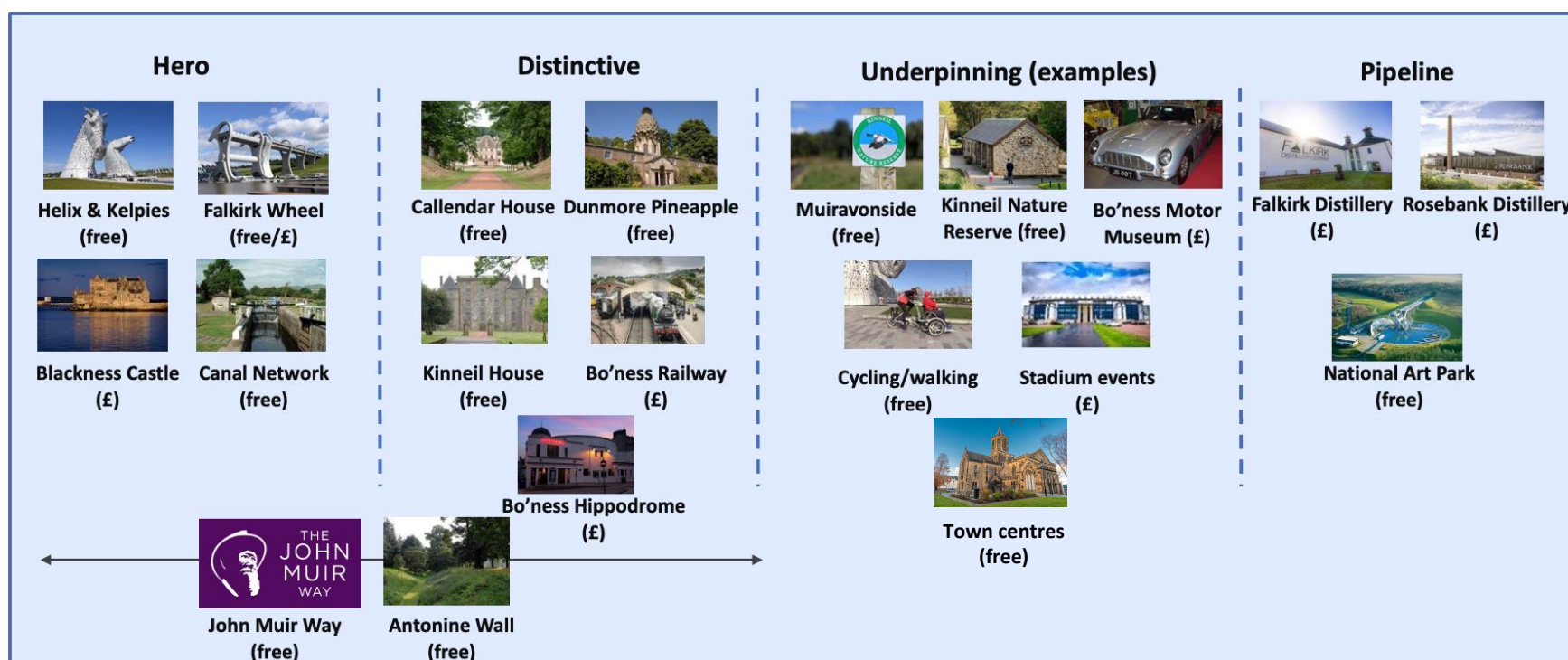
Below is a summary SWOT drawing on research and consultation. The strengths and opportunities on the left-hand side of the diagram again indicate a good base for future growth.

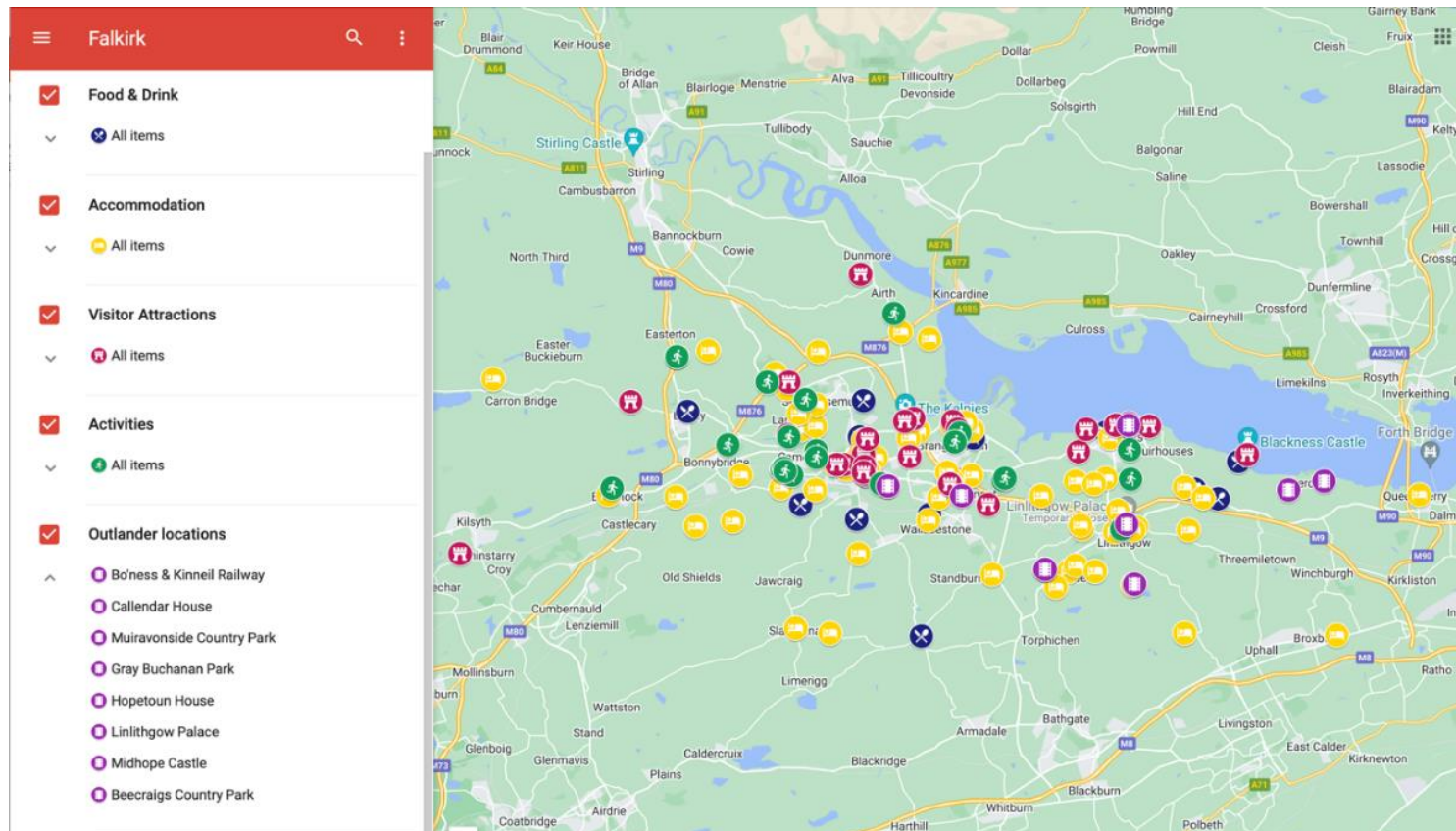
STRENGTHS <ul style="list-style-type: none">• Supportive policy environment for tourism (national, regional, local)• Delivery of 2015 Tourism Strategy• The scale of pre-pandemic tourism growth – especially staying visits• Iconic attractions plus range of smaller/more local attractions• Quality of content and growth of Visit Falkirk social channels	WEAKNESSES <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
OPPORTUNITIES <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	THREATS <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.





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



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



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

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
Adventure Seekers 	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.	Days out – from home or staying elsewhere. Short breaks and longer holidays.	International Explorers 	Typically 45+ travelling without children. Mid- affluence. Overseas trips a priority. Like relaxed pace. Looking for sightseeing, heritage, culture, nature. Local food & drink.	Leisure breaks. Tour groups. Cruise.
Engaged Sightseers 	Typically older 55+. Predominantly English. Mid-affluence. Take numerous breaks. Interested in general. sightseeing and touring, history, scenery. Accessibility important.	Days out – from home or staying elsewhere. Short breaks and longer holidays. Tour groups. Cruise.	Visiting Friends & Relatives 	Local links – from the area or friends or relations living here. Looking for social time together. Attractions, activities, events. Eating out.	Short and long breaks. Days out.
Natural Advocates 	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.	Leisure breaks.	Business Travellers 	Non-discretionary business meetings. Corporate meetings and events. Driven by local business and sectors. Freeport opportunities.	Extended stays post-business. Repeat leisure visits with family/friends.

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	£96m	£115m

*All monetary values are 2023 prices.

Baseline is 2021 STEAM data inflated to 2023 using Bank of England calculator.

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

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance.

Equality & Poverty Impact Assessment 00500 (Version 1)

SECTION ONE: ESSENTIAL INFORMATION

Service & Division:	Place Services Growth, Planning & Climate	Lead Officer Name:	Carron Smith
		Team:	Growth and Investment unit
		Tel:	07483409111
		Email:	carron.smith@falkirk.gov.uk
Proposal:	Approval of Falkirk Tourism Strategy 23-28	Reference No:	

What is the Proposal?	Budget & Other Financial Decision	Policy (New or Change)	HR Policy & Practice	Change to Service Delivery / Service Design
	No	Yes	No	No
Who does the Proposal affect?	Service Users	Members of the Public	Employees	Job Applicants
	No	Yes	No	No
Other, please specify:				

Identify the main aims and projected outcome of this proposal (please add date of each update):

20/04/2023	Action Area1 Building up the attractions : Six attractors capable of extending the offer, driving visits and longer stays will be the focus for action and support. Some of this will be the implementation of existing plans and proposals, while others are concerned with revitalising or extending the opportunity around existing asset
20/04/2023	Action area 2 : Amplifying destination Branding 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.
20/04/2023	Action area 3 - enabling success 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. Accommodation, Tourism BID, Business support, Climate Action
20/04/2023	Action Area 4 - Delivery through partnership 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

Identify the main aims and projected outcome of this proposal (please add date of each update):	
30/04/2028	Monitor progress - Economic impact from visitor expenditure Increase visitor expenditure by 20% over the next 5 years (£96m - £115m)

SECTION TWO: FINANCIAL INFORMATION

For budget changes ONLY please include information below:			Benchmark, e.g. Scottish Average
Current spend on this service (£'0000s)	Total:		
Reduction to this service budget (£'0000s)	Per Annum:		
Increase to this service budget (£'000s)	Per Annum:		
If this is a change to a charge or concession please complete.	Current Annual Income Total:		
	Expected Annual Income Total:		
If this is a budget decision, when will the saving be achieved?	Start Date:		
	End Date (if any):		

SECTION THREE: EVIDENCE	Please include any evidence or relevant information that has influenced the decisions contained in this EPIA. (This could include demographic profiles; audits; research; health needs assessments; national guidance or legislative requirements and how this relates to the protected characteristic groups.)
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A - Quantitative Evidence	This is evidence which is numerical and should include the number people who use the service and the number of people from the protected characteristic groups who might be affected by changes to the service.
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Information on segmented markets supplied by Visit Scotland has been used to inform strategy development:

- Nearly one in five people in the UK have a hearing disability or impairment
- £249bn is spending power of disabled people in the economy
- 86% of senior travellers will make a return visit if their needs are met.
- 72% of disabled customers are more likely to visit new places if they feel welcomed by staff.
- 56% of visitors think that if a venue doesn't advertise their accessible facilities, it's because they don't have any.
- Access surveys consistently show that a lack of published accessibility information is one of the top barriers. This is true for both disabled people and others with specific access needs. When planning a trip, 81% of disabled people will check a business' website before visiting. But 73% have found information on a venue's website to be misleading, confusing, or inaccurate.

B - Qualitative Evidence	This is data which describes the effect or impact of a change on a group of people, e.g. some information provided as part of performance reporting.
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Social - case studies; personal / group feedback / other

A range of engagement was undertaken with tourism partners, businesses, visitor attractions. Councillors and the Falkirk BID as part of the development process. This is summarised within Section 4.

Best Judgement:	
Has best judgement been used in place of data/research/evidence?	Yes
Who provided the best judgement and what was this based on?	Experienced Officer in collaboration with relevant colleagues
What gaps in data / information were identified?	
Is further research necessary?	No
If NO, please state why.	there is limited negative impact on protected groups

SECTION FOUR: ENGAGEMENT**Engagement with individuals or organisations affected by the policy or proposal must take place**

Has the proposal / policy / project been subject to engagement or consultation with service users taking into account their protected characteristics and socio-economic status?	Yes	
If YES, please state who was engagement with.	<p>*Survey (49 Tourism businesses in Falkirk area): 7-24th Feb 2023 *Falkirk Area Tourism Strategy workshop: 21 Feb 23</p> <p>Tourism partners, businesses, Councillors, Council staff involved in tourism activities , Falkirk BID, visitor attractions</p>	
If NO engagement has been conducted, please state why.		
How was the engagement carried out?	What were the results from the engagement? Please list...	

Focus Group	Yes	<p>Falkirk Area Tourism strategy Workshop: The workshop content comprised a number of sessions as follows:</p> <ul style="list-style-type: none"> - Presentation of SWOT slide – inviting comments from attendees - Mapping exercise – groups drawing a map of the area and marking the main elements of the visitor offer and identifying emerging themes, including iconic attractions, outdoor activities, history, film tourism - A session on markets looking at proposed segments with groups listing what might delight or disappoint each segment. Delights included outdoor space – cycling/walking routes, itineraries, historic attractions and new/iconic experiences. Disappointments included a lack of accommodation choice, a lack of distinctiveness and some areas being rundown. - An exercise on current trends and how Falkirk can respond or take advantage of each trend. Opportunities included the location of Falkirk (between big attractions of Edinburgh and Glasgow), low cost/free attractions, package more experiences, active travel, infrastructure, explore the need for an app for visitors and the role of influencers to raise awareness - Attendees were asked to prepare a 30 second ‘elevator pitch’ describing what is special and different about the Falkirk area without using overused words, eg hidden gems, something for everyone. Phrases used in the creative pitches included ‘reawakening from a proud industrial past’, ‘choose your own adventure’, ‘frontier’, ‘extraordinary feats of engineering’ and ‘connected through arteries such as the canal network’. - The final session explored what success would look like with groups creating a ‘piece to camera’ conveying how success was delivered following the launch of the new tourism strategy. These presentations identified a number of ways to achieve success including a revitalised tourism partnership, the need for investment, wider choice of accommodation, the creation of a Falkirk visitor pass offering discounts, visitors staying longer and a workforce that has been upskilled.
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Survey	Yes	<p>Headlines from the Business Survey:</p> <ul style="list-style-type: none"> * Tourism businesses are ambitious for the Falkirk area - there's an appetite to invest and grow * A call to amplify the day trip market and attract new visitors for short breaks * The Kelpies and Falkirk Wheel are icons. Businesses want visitors to enjoy these attractions but to experience more of the destination * Active outdoors, history & heritage and attractions are themes businesses want to see marketed more to attract new visitors * Wider Scotland, the UK and overseas seen as relevant target markets * Businesses want more repeat visits, greater use of local hospitality and overnight stays * A desire to collaborate more to develop and market the destination: * Marketing to showcase the breadth and depth of the offer * Improving the availability and quality of local accommodation * Supporting local networks to encourage collaboration * Visit Falkirk branding is seen as bright and bold – but now a little out of date * Not optimally designed to convey the area's attractions and rich history and heritage * An opportunity to refresh the brand to communicate the offer more clearly and create an emotional connection with visitors
Display / Exhibitions	No	
User Panels	No	
Public Event	No	
Other: please specify	<p>CONSULTATIONS</p> <p>A series of individual consultations were undertaken as follows:</p> <ul style="list-style-type: none"> ☐ Lesley O'Hare, Cultural Services Manager – Falkirk Council ☐ Ross McMillan, Head of Destinations – Scotland, Scottish Canals ☐ Peter Wilson, Cruise Forth ☐ Neil Christison – Regional Director, VisitScotland ☐ Jacquie Macarthur – Economic Development Officer, Falkirk Council 	
Has the proposal / policy/ project been reviewed / changed as a result of the engagement?	Yes	
Have the results of the engagement been fed back to the consultees?	Yes	
Is further engagement recommended?	No	

SECTION FIVE: ASSESSING THE IMPACT

Equality Protected Characteristics: What will the impact of implementing this proposal be on people who share characteristics protected by the Equality Act 2010 or are likely to be affected by the proposal / policy / project? This section allows you to consider other impacts, e.g. poverty, health inequalities, community justice, carers etc.

Protected Characteristic	Neutral Impact	Positive Impact	Negative Impact	Please provide evidence of the impact on this protected characteristic.
Age		✓		Target visitor markets have been segmented and selected on basis of those types that are more likely to extend their stays and spend more. 4 of the 6 key segments have been profiled by age : Adventure seekers - under 35 Engaged sightseers - over 55 Natural advocates - middle aged International explorers - over 45
Disability		✓		Accessibility issues have been addressed with FC accessing Visit Scotland Growth fund to produce 3 downloadable itinerates for family fun, Heritage and outdoor activity from an accessible perspective. The key messages around this campaign will include: The full range of accessible attractions and accommodation in the Forth Valley area The diversity of offering for the Forth Valley area. Our central location within Scotland, with great connectivity to the major cities making us an easily accessible location on the Heart of Scotland
Sex	✓			no adverse impact
Ethnicity	✓			no adverse impact
Religion / Belief / non-Belief	✓			no adverse impact
Sexual Orientation	✓			no adverse impact
Transgender	✓			no adverse impact
Pregnancy / Maternity	✓			no adverse impact
Marriage / Civil Partnership	✓			no adverse impact

Poverty		✓		By attracting more visitors to the area who are staying for longer and spending more will in the longer term create a positive impact for people affected by poverty as the economic benefit will be to generate more local jobs in the economy which are low entry level and relatively easy to train staff.
Other, health, community justice, carers etc.	✓			no adverse impact
Risk (Identify other risks associated with this change)	no other risks identified			

Public Sector Equality Duty: Scottish Public Authorities must have 'due regard' to the need to eliminate unlawful discrimination, advance quality of opportunity and foster good relations. Scottish specific duties include:

	Evidence of Due Regard
Eliminate Unlawful Discrimination (harassment, victimisation and other prohibited conduct):	
Advance Equality of Opportunity:	
Foster Good Relations (promoting understanding and reducing prejudice):	

SECTION SIX: PARTNERS / OTHER STAKEHOLDERS

Which sectors are likely to have an interest in or be affected by the proposal / policy / project?		Describe the interest / affect.
Business	Yes	Tourism businesses , visitor attractions , hospitality trade , accommodation providers and the retail businesses all have in interest in the Tourism strategy
Councils	No	
Education Sector	No	
Fire	No	
NHS	No	
Integration Joint Board	No	
Police	No	
Third Sector	No	
Other(s): please list and describe the nature of the relationship / impact.		

SECTION SEVEN: ACTION PLANNING

Mitigating Actions: If you have identified impacts on protected characteristic groups in Section 5 please summarise these in the table below detailing the actions you are taking to mitigate or support this impact. If you are not taking any action to support or mitigate the impact you should complete the No Mitigating Actions section below instead.

Identified Impact	To Who	Action(s)	Lead Officer	Evaluation and Review Date	Strategic Reference to Corporate Plan / Service Plan / Quality Outcomes
Age - targeting specific tourists segments according to their age	Tourists	Marketing campaigns with Visit Scotland	Carron Smith	30/04/2025	n/a
disability - promoting accessible tourism destinations	Tourists	specific marketing activity and campaigns highlighting accessible tourism attractions in Falkirk	Carron Smith	30/04/2025	n/a

No Mitigating Actions

Please explain why you do not need to take any action to mitigate or support the impact of your proposals.

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Are actions being reported to Members?	No
If yes when and how ?	

SECTION EIGHT: ASSESSMENT OUTCOME

Only one of following statements best matches your assessment of this proposal / policy / project. Please select one and provide your reasons.

No major change required	Yes	The Tourism strategy does not require to be changed
The proposal has to be adjusted to reduce impact on protected characteristic groups	No	
Continue with the proposal but it is not possible to remove all the risk to protected characteristic groups	No	
Stop the proposal as it is potentially in breach of equality legislation	No	

SECTION NINE: LEAD OFFICER SIGN OFF

Lead Officer:

Signature:		Date:	20/04/2023
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SECTION TEN: EPIA TASK GROUP ONLY

OVERALL ASSESSMENT OF EPIA: Has the EPIA demonstrated the use of data, appropriate engagement, identified mitigating actions as well as ownership and appropriate review of actions to confidently demonstrate compliance with the general and public sector equality duties?		Yes
ASSESSMENT FINDINGS If YES, use this box to highlight evidence in support of the assessment of the EPIA If NO, use this box to highlight actions needed to improve the EPIA	Market segmentation information provided by Visit Scotland has been used to support the development of the strategy to ensure equalities considerations are embedded. A wide range of engagement was also undertaken and is detailed within Section 4.	
Where adverse impact on diverse communities has been identified and it is intended to continue with the proposal / policy / project, has justification for continuing <u>without making changes been made</u> ?	Yes / No	If YES, please describe:

LEVEL OF IMPACT: The EPIA Task Group has agreed the following level of impact on the protected characteristic groups highlighted within the EPIA		
LEVEL		COMMENTS
HIGH	Yes / No	
MEDIUM	Yes / No	
LOW	Yes	No negative impacts on protected characteristic groups identified. The strategy takes positive actions to address barriers faced by these groups, in particular older people and people with disabilities.

SECTION ELEVEN: CHIEF OFFICER SIGN OFF

Director / Head of Service:			
Signature:		Date:	03/05/2023