Introduction
Background Information and Aim

This report provides a summary of statistics on tourism in Scotland’s Forth Valley region including Clackmannanshire, Falkirk and Stirling. It gathers information from a suite of tourism monitors managed by VisitScotland’s Insight Department, and other national statistics and commissioned research.

Most of the statistics are produced from surveys. The primary surveys used are:

- **The Great Britain Tourism Survey** (GBTS) that provides data for overnight visitors resident in Scotland, England and Wales. The survey is conducted through face-to-face interviews and is jointly commissioned by VisitScotland, VisitEngland and VisitWales. More information about the survey can be found on visitbritain.org.
- **The International Passenger Survey** (IPS) which is run by the Office for National Statistics (ONS). This survey provides data for overseas visitors. Details about the survey and methodology used can be found on the ONS website and the VisitBritain website.
  **Please note:** In 2020, the methodology of IPS was revised to represent more accurately international visitors and all data was recalculated back to 2009. As a result, international figures in this report might differ from, and supersede, previously published IPS data.
- **The Great Britain Day Visits Survey** (GBDVS) that provides data for tourism day visitors resident in Scotland, England and Wales. More information about the survey can be found on visitbritain.org.
- **The Scottish Accommodation Occupancy Survey** (SAOS) that provides data on occupancy in Scotland’s tourist accommodation sectors.

While results from these surveys can give good precision at national level, at regional level they can be less reliable because they can be based on a relatively small sample size. This incurs a larger margin of statistical error reducing data reliability. Therefore results should be treated with caution. To reduce error margins, it is sometimes useful to take an average over three years to provide a larger sample size. In this report, 3-year average figures have been calculated to provide a more robust basis for analysis of detailed data such as visitors’ region of residence, purpose of travel, or seasonality of trips. Annual visitor figures are provided on pages 6 and 7, as well as in the form of a historical trend chart on page 9.

There are some differences between regions as identified by the GBTS and GBDVS, IPS, and SAOS. Most international and domestic figures refer to the Forth Valley region. However, some international figures are only available at a wider regional level. For this reason, the “Duration of stay” and “Seasonality” charts on page 6 are based on data for the “Loch Lomond, Stirling, Trossachs and Argyll” region including the following local authorities: Argyll and Bute, Clackmannanshire, Falkirk and Stirling. Accommodation occupancy rates on page 5 also refer to this wider region.

This report starts with an **overall** evaluation of Forth Valley tourism performance in 2019. It then looks in more detail into the **international** and **domestic** overnight visitors to the region. Lastly, the report focuses on tourism day visits and the historical trend of tourism performance in the region since 2013.

**Sources**

- Great Britain Tourism Survey (GBTS) 2019
- International Passenger Survey (IPS) 2019
- Great Britain Day Visits Survey (GBDVS) 2019
- Scottish Accommodation Occupancy Survey (SAOS) 2019
- MoffatCentre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018
## Overall Tourism in Forth Valley

Latest Figures

### Overall Tourism Summary:
Visits, Nights and Spend in Forth Valley, 2017-2019 Annual Average Figures

<table>
<thead>
<tr>
<th>VISITS BREAKDOWN</th>
<th>Visits 2017-19 Average (000s)</th>
<th>% Change 2016-18/2017-19</th>
<th>Visits 2017-19 Average (000s)</th>
<th>% Change 2016-18/2017-19</th>
<th>Spend 2017-19 Average (£m)</th>
<th>% Change 2016-18/2017-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>101</td>
<td>-6%</td>
<td>416</td>
<td>+26%</td>
<td>29</td>
<td>+9%</td>
</tr>
<tr>
<td>North America</td>
<td>44</td>
<td>+2%</td>
<td>170</td>
<td>+9%</td>
<td>16</td>
<td>+19%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>21</td>
<td>+5%</td>
<td>115</td>
<td>+6%</td>
<td>8</td>
<td>-7%</td>
</tr>
<tr>
<td><strong>Total International Overnight</strong></td>
<td><strong>167</strong></td>
<td><strong>-2%</strong></td>
<td><strong>701</strong></td>
<td><strong>+18%</strong></td>
<td><strong>53</strong></td>
<td><strong>+9%</strong></td>
</tr>
<tr>
<td>Scotland</td>
<td>312</td>
<td>-7%</td>
<td>683</td>
<td>-12%</td>
<td>51</td>
<td>+1%</td>
</tr>
<tr>
<td>Rest of Great Britain</td>
<td>205</td>
<td>-7%</td>
<td>713</td>
<td>-12%</td>
<td>41</td>
<td>-9%</td>
</tr>
<tr>
<td><strong>Total Domestic Overnight</strong></td>
<td><strong>516</strong></td>
<td><strong>-7%</strong></td>
<td><strong>1,396</strong></td>
<td><strong>-12%</strong></td>
<td><strong>92</strong></td>
<td><strong>-4%</strong></td>
</tr>
<tr>
<td><strong>Total Overnight Tourism</strong></td>
<td><strong>683</strong></td>
<td><strong>-6%</strong></td>
<td><strong>2,097</strong></td>
<td><strong>-4%</strong></td>
<td><strong>145</strong></td>
<td><strong>+1%</strong></td>
</tr>
<tr>
<td><strong>Total Day Tourism</strong></td>
<td><strong>8,124</strong></td>
<td><strong>-5%</strong></td>
<td><strong>N/A</strong></td>
<td><strong>N/A</strong></td>
<td><strong>183</strong></td>
<td><strong>-7%</strong></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>8,807</strong></td>
<td><strong>-5%</strong></td>
<td><strong>2,097</strong></td>
<td><strong>-4%</strong></td>
<td><strong>328</strong></td>
<td><strong>-4%</strong></td>
</tr>
</tbody>
</table>

Sources: IPS/GBTS/GBDVS, 2017-19. Figures may not sum up due to rounding.
National figures are available in the Key Facts on Tourism in Scotland 2019 report published on visitscotland.org.
Visitors to Forth Valley
Tourism Performance | 2019

In 2019, the Forth Valley enjoyed a significant increase in overnight visits. This was result of a big rise in the number of domestic travellers to the region. Overnight tourism expenditure rose more marginally but it was the second highest in seven years.

Visitors made 683,000 overnight trips per year to Forth Valley between 2017 and 2019. Number of bednights was 2.1 million per year, while average annual expenditure totalled at £145 million over the same period. Unlike the annual data, the 3-year average figures indicate small decreases in trips and bednights and a minimal growth in expenditure from 2016-2018 to 2017-2019. This is due to the very strong performance of the domestic market in 2016 when number of overnight trips peaked.

In 2017-2019, Forth Valley’s visitor mix remained essentially unchanged. British residents continued to account for three quarters of all overnight trips to the region, most of which were made by Scottish travellers. International visitors undertook 24% of the overnight trips to Forth Valley, the third highest share of overseas tourism across all of Scotland’s regions.

International bednights and spend grew in 2017-2019, mostly driven by the European markets. As a result, overseas expenditure formed 37% of the total overnight spend in the region, up from 34% in 2016-2018.

Domestic travellers made 8.1 million day tourism trips per year to the Forth Valley, spending £183 million annually between 2017 and 2019.
Regional Tourism Performance
Local Statistics

Regional Sustainable Tourism* – Business Units, Employment and Gross Value Added, 2018

<table>
<thead>
<tr>
<th>Local Authority/ Region</th>
<th>Units</th>
<th>Employment</th>
<th>GVA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>% Change 2017/18</td>
<td>% Change 2017/18</td>
</tr>
<tr>
<td>Clackmannanshire</td>
<td>110</td>
<td>-11%</td>
<td>1.1</td>
</tr>
<tr>
<td>Falkirk</td>
<td>354</td>
<td>+4%</td>
<td>4.1</td>
</tr>
<tr>
<td>Stirling</td>
<td>441</td>
<td>+2%</td>
<td>5.6</td>
</tr>
<tr>
<td><strong>Forth Valley</strong></td>
<td><strong>905</strong></td>
<td><strong>+1%</strong></td>
<td><strong>10.8</strong></td>
</tr>
</tbody>
</table>

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit visitscotland.org.
*The Scottish Government defines sustainable tourism as a growth sector including a number of business types detailed on their website. Latest statistics were published on 24th June 2020 and cover the period up to 2018.

Top Five Free and Paid Visitor Attractions in Forth Valley (with Visitor Numbers), 2019

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Visitor Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Helix</td>
<td>583,706</td>
</tr>
<tr>
<td>Queen Elizabeth Forest Park</td>
<td>317,366</td>
</tr>
<tr>
<td>Trossachs Woollen Mill</td>
<td>175,164</td>
</tr>
<tr>
<td>Callendar Wood</td>
<td>157,534</td>
</tr>
<tr>
<td>Muiravonside Country Park</td>
<td>143,851</td>
</tr>
<tr>
<td>Stirling Castle</td>
<td>609,698</td>
</tr>
<tr>
<td>Doune Castle</td>
<td>152,987</td>
</tr>
<tr>
<td>National Wallace Monument</td>
<td>127,692</td>
</tr>
<tr>
<td>Blackness Castle</td>
<td>79,265</td>
</tr>
<tr>
<td>Bo’ness and Kinneil Railway</td>
<td>60,822</td>
</tr>
</tbody>
</table>

Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019. VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

Occupancy Rates by Accommodation Type and Month, Argyll & the Isles and Forth Valley 2019

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel (Room Occ.)</td>
<td>62%</td>
<td>64%</td>
<td>67%</td>
<td>76%</td>
<td>83%</td>
<td>87%</td>
<td>83%</td>
<td>87%</td>
<td>82%</td>
<td>77%</td>
<td>62%</td>
<td>61%</td>
<td><strong>74%</strong></td>
</tr>
<tr>
<td>Guest House/B&amp;B (Room Occ.)</td>
<td>37%</td>
<td>48%</td>
<td>34%</td>
<td>45%</td>
<td>72%</td>
<td>70%</td>
<td>74%</td>
<td>86%</td>
<td>69%</td>
<td>46%</td>
<td>38%</td>
<td>17%</td>
<td><strong>52%</strong></td>
</tr>
<tr>
<td>Self-Catering (Unit Occ.)</td>
<td>43%</td>
<td>50%</td>
<td>54%</td>
<td>55%</td>
<td>63%</td>
<td>63%</td>
<td>67%</td>
<td>71%</td>
<td>59%</td>
<td>53%</td>
<td>35%</td>
<td>40%</td>
<td><strong>54%</strong></td>
</tr>
<tr>
<td>Hostel (Bed Occ.)</td>
<td>16%</td>
<td>31%</td>
<td>32%</td>
<td>56%</td>
<td>66%</td>
<td>60%</td>
<td>67%</td>
<td>72%</td>
<td>60%</td>
<td>43%</td>
<td>26%</td>
<td>27%</td>
<td><strong>50%</strong></td>
</tr>
</tbody>
</table>

II. International Visitors to Forth Valley
Overnight Tourism

International figures indicate a decrease in the volume and value of tourism to the Forth Valley from 2018. Overseas trips and expenditure fell by 12% and 9%, respectively, which was partly due to a very strong tourism performance in 2018. Compared to 2016-2018, in 2017-2019 visits dropped by just 2% while spend increased by 9%. Between 2017 and 2019, three in four trips to the region were undertaken by holidaymakers. An increase in the number of bednights suggests a rise in the average length of stay to 4.2 nights over the same period. Germany and the USA were the largest international markets for inbound tourism, accounting for just over a fifth of all trips each.

### International Tourism Performance, 2019 and 2017-19 Annual Average Figures

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Scotland Key Facts in 2019</th>
<th>% Change 2018/19</th>
<th>Forth Valley Key Facts in 2019</th>
<th>% Change 2018/19</th>
<th>2017-19 Annual Average</th>
<th>% Change 2016-18/2017-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>3,460</td>
<td>-7%</td>
<td>153</td>
<td>-12%</td>
<td>167</td>
<td>-2%</td>
</tr>
<tr>
<td>Spend (£M)</td>
<td>2,538</td>
<td>+7%</td>
<td>51</td>
<td>-9%</td>
<td>53</td>
<td>+9%</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>27,385</td>
<td>+8%</td>
<td>798</td>
<td>+26%</td>
<td>701</td>
<td>+18%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>7.9 nights</td>
<td>+16%</td>
<td>5.2 nights</td>
<td>+43%</td>
<td>4.2 nights</td>
<td>+20%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£93</td>
<td>0%</td>
<td>£64</td>
<td>-28%</td>
<td>£76</td>
<td>-7%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£734</td>
<td>+15%</td>
<td>£331</td>
<td>+3%</td>
<td>£317</td>
<td>+12%</td>
</tr>
</tbody>
</table>

Source: IPS, 2019.

### Duration of Stay*

- 1-3 nights (6%)
- 4-7 nights (27%)
- 8-14 nights (47%)
- 15+ nights (19%)

### Seasonality*

- Jan-Mar (6%)
- Apr-Jun (33%)
- Jul-Sep (46%)
- Oct-Dec (16%)

### Purpose of Travel

- Business (3%)
- Holiday (74%)
- VFR** (21%)
- Other (1%)

### Top 5 Overseas Markets

- Germany 21%
- USA 21%
- Netherlands 12%
- Belgium 7%
- Canada 6%

Source: IPS. All charts are based on 3-year average data (2017-2019). Figures may not sum up due to rounding.
*Duration of stay and seasonality data refers to the wider “Loch Lomond, Stirling, Trossachs and Argyll” region (including Argyll and Bute, Clackmannanshire, Falkirk and Stirling). **VFR = Visiting friends or relatives.
III. Domestic Visitors to Forth Valley

Overnight Tourism

2019 was a good year for domestic overnight tourism in the Forth Valley. Trips by British residents increased by nearly a half from their 2018 levels which resulted in a 12% rise in expenditure. These figures were mostly driven by a rise in holiday travel and represented 4.9% of the domestic overnight visits and 3.3% of the associated spend nationally in 2019. In 2017-2019, the Forth Valley enjoyed the most even seasonal spread of domestic visitors across all of Scotland’s regions. VFR trips accounted for 30% of all visits which is nearly identical to the national average, suggesting holiday trips to the region are also being made throughout the whole calendar year.

### Domestic Overnight Tourism Performance, 2019 and 2017-19 Annual Average Figures

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Scotland Key Facts in 2019</th>
<th>% Change 2018/19</th>
<th>Forth Valley Key Facts in 2019*</th>
<th>% Change 2018/19</th>
<th>2017-19 Annual Average</th>
<th>% Change 2016-18/2017-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>13,810</td>
<td>+17%</td>
<td>674</td>
<td>+47%</td>
<td>516</td>
<td>-7%</td>
</tr>
<tr>
<td>Spend (£M)</td>
<td>3,200</td>
<td>+16%</td>
<td>106</td>
<td>+12%</td>
<td>92</td>
<td>-4%</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>46,413</td>
<td>+15%</td>
<td>1,683</td>
<td>+43%</td>
<td>1,396</td>
<td>-12%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>3.4 nights</td>
<td>-2%</td>
<td>2.5 nights</td>
<td>-2%</td>
<td>2.7 nights</td>
<td>-5%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£69</td>
<td>+1%</td>
<td>£63</td>
<td>-22%</td>
<td>£66</td>
<td>+9%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£232</td>
<td>-1%</td>
<td>£157</td>
<td>-24%</td>
<td>£179</td>
<td>+4%</td>
</tr>
</tbody>
</table>

Source: GBTS, 2019. *Annual Forth Valley data is based on relatively low sample sizes.

### Duration of Stay

- 1-3 nights (75%)
- 4-7 nights (19%)
- 8-14 nights (6%)

### Purpose of Travel

- Business (13%)
- Holiday (55%)
- VFR (30%)
- Other (2%)

### Seasonality

- Jan-Mar (25%)
- Apr-Jun (26%)
- Jul-Sep (27%)
- Oct-Dec (22%)

### Visitors’ Age

- 16-24 (6%)
- 25-34 (13%)
- 35-44 (13%)
- 45-54 (23%)
- 55-64 (20%)
- 65+ (19%)

Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Forth Valley.
Domestic Day Visits to Forth Valley
Tourism Performance and Activities

National and Regional Domestic Day Visit Tourism Performance, 2017-2019 Average Figures

<table>
<thead>
<tr>
<th></th>
<th>Visits</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017-19 Average (million)</td>
<td>% Change 2016-18/2017-19</td>
</tr>
<tr>
<td>Scotland</td>
<td>140.8</td>
<td>-2%</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>8.1</td>
<td>-5%</td>
</tr>
<tr>
<td>Clackmannashire</td>
<td>1.2</td>
<td>+18%</td>
</tr>
<tr>
<td>Falkirk</td>
<td>2.9</td>
<td>-16%</td>
</tr>
<tr>
<td>Stirling</td>
<td>4.0</td>
<td>-2%</td>
</tr>
</tbody>
</table>

Source: GBDVS. Figures may not sum up due to rounding.

Most Popular Activities Undertaken as Part of a Day Trip, Forth Valley: 2016-18 Average Annual Figures (Number of Day Trips in Millions)

- Went for a meal in a restaurant, café, hotel, pub, etc.  | 1.3
- Visited family for leisure                           | 1.1
- Long walk, hike or ramble (minimum of 2 miles/1 hour) | 1.0
- Sightseeing on foot                                    | 0.9
- Went for a drink in a pub, club, hotel, etc.           | 0.8
- Short walk/stroll – up to 2 miles/1 hour               | 0.8
- Visited friends for leisure                            | 0.6
- Watched wildlife, bird watching                        | 0.5
- Went for a snack in a fast food outlet, takeaway, etc.  | 0.5
- Sightseeing by car                                     | 0.5

Source: GBDVS.
Visitors to Forth Valley
Historical Trend Information | 2013 - 2019

In 2019, total **overnight trips** to the Forth Valley were the **highest since 2016**. This was underlain by a rise in domestic travel to the region which continued to increase for a second consecutive year following a massive drop in 2017. Overnight **expenditure** of British residents also **grew**. In 2019, it was 4% above the annual average for the 2013-2018 period. While the number of international trips in 2019 was lower than in any other year since 2016, overseas tourism expenditure in the region was 4% above the annual average for 2016-2018. Since 2014, the growth in international spend in the region has outpaced the growth in visits, indicating an **increase in overseas residents’ average spend**.

**Domestic and International Overnight Tourism, 2013-2019**

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<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic (000s)</td>
<td>459</td>
<td>560</td>
<td>720</td>
<td>799</td>
<td>415</td>
<td>460</td>
<td>674</td>
</tr>
<tr>
<td>International (000s)</td>
<td>132</td>
<td>143</td>
<td>150</td>
<td>166</td>
<td>174</td>
<td>173</td>
<td>153</td>
</tr>
<tr>
<td>Total Overnight (000s)</td>
<td>591</td>
<td>703</td>
<td>870</td>
<td>965</td>
<td>589</td>
<td>633</td>
<td>827</td>
</tr>
</tbody>
</table>
```

Sources: GBTS, IPS.

**Domestic and International Overnight Spend, 2013-2019**

```
<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic (£m)</td>
<td>97</td>
<td>95</td>
<td>132</td>
<td>117</td>
<td>76</td>
<td>95</td>
<td>106</td>
</tr>
<tr>
<td>International (£m)</td>
<td>43</td>
<td>43</td>
<td>43</td>
<td>37</td>
<td>53</td>
<td>56</td>
<td>51</td>
</tr>
<tr>
<td>Total Overnight (£m)</td>
<td>140</td>
<td>138</td>
<td>175</td>
<td>154</td>
<td>129</td>
<td>151</td>
<td>157</td>
</tr>
</tbody>
</table>
```

Sources: GBTS, IPS.
Appendix

USING AND INTERPRETING STATISTICAL DATA
Sources: Data is sourced from the Office for National Statistics’ International Passenger Survey (IPS), The Great Britain Tourism Survey (GBTS), The Great Britain Day Visits Survey (GBDVS), Scottish Accommodation Occupancy Survey (SAOS), Moffat Centre’s Scottish Visitor Attraction Monitor (VAM) and ONS’ Scottish Annual Business Survey (SABS).

SAMPLE SIZES
Analysis of sub-groups, such as trips by purpose or demographic group, relies on smaller sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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