



Insight Department:  
Forth Valley Factsheet | 2019

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# Introduction

## Background Information and Aim

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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](http://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](http://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
- Moffat Centre Visitor Attraction Monitor (VAM) 2019
- Scottish Annual Business Statistics (SABS): Sustainable Tourism by Local Authority Area 2018

# I. Overall Tourism in Forth Valley

## Latest Figures

Dollar Glen, Clackmannanshire

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

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

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](https://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.

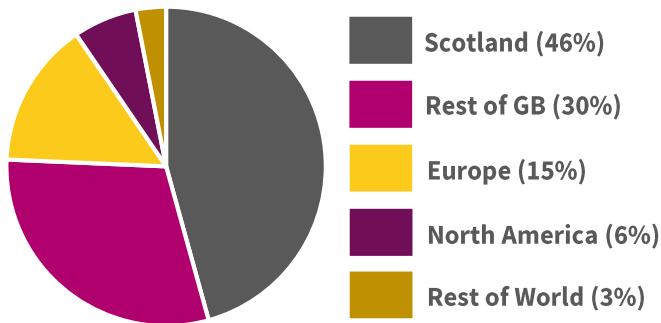
Visitors made **683,000 overnight trips** per year to Forth Valley between 2017 and 2019. Number of bednights was **2.1 million** per year, while average annual expenditure totalled at **£145 million** over the same period. Unlike the annual data, the 3-year average figures indicate small decreases in 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.

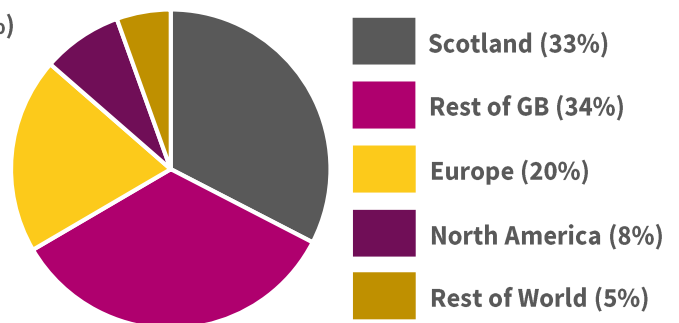
International bednights and spend grew in 2017-2019, mostly driven by the **European markets**. As a result, overseas expenditure formed 37% of the total overnight spend in the region, up from 34% in 2016-2018.

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

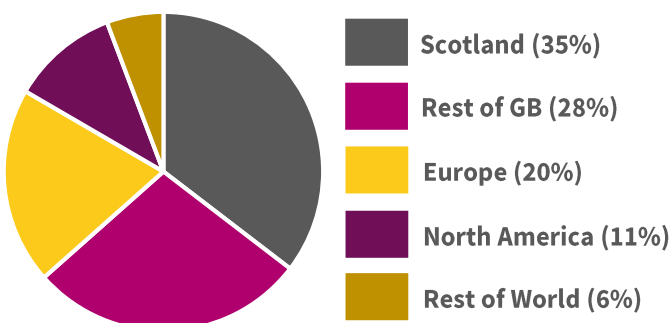
### Overnight Visits



### Nights



### Overnight Spend



Sources: GBTS/IPS, 2017-19.

# Regional Tourism Performance

## Local Statistics

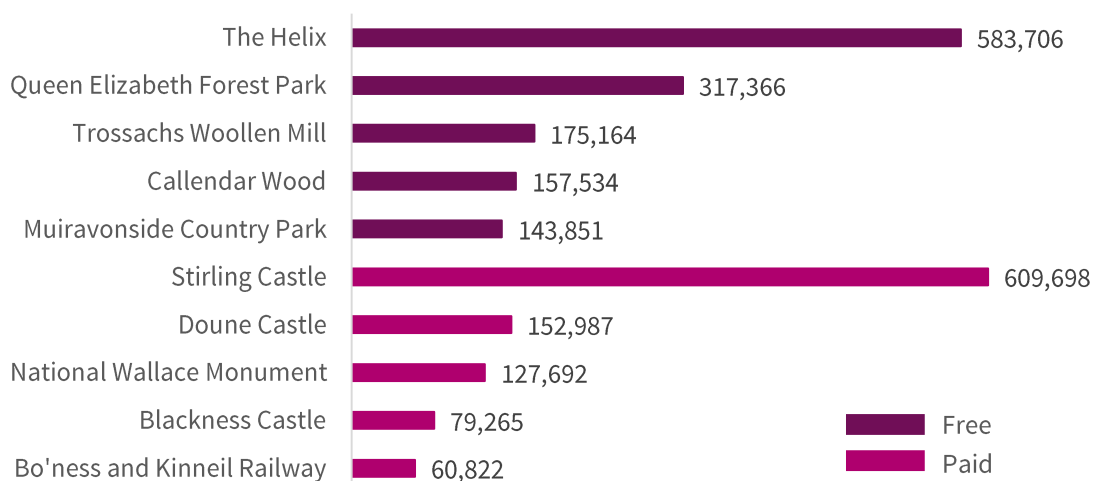
### Regional Sustainable Tourism\* – Business Units, Employment and Gross Value Added, 2018

Local Authority/ Region	Units		Employment		GVA	
	Number	% Change 2017/18	(000s)	% Change 2017/18	(£m)	% Change 2017/18
Clackmannanshire	110	-11%	1.1	0%	23.1	-5%
Falkirk	354	+4%	4.1	+2%	64.3	+50%
Stirling	441	+2%	5.6	-2%	129.5	-1%
<b>Forth Valley</b>	<b>905</b>	<b>+1%</b>	<b>10.8</b>	<b>0%</b>	<b>216.9</b>	<b>+10%</b>

Source: SABS, 2018. Figures may not sum up due to rounding. For more information, visit [visitscotland.org](http://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 24<sup>th</sup> June 2020 and cover the period up to 2018.

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



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](mailto:info@moffatcentre.com).

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

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

Source: SAOS, 2019.

## II. International Visitors to Forth Valley

### Overnight Tourism

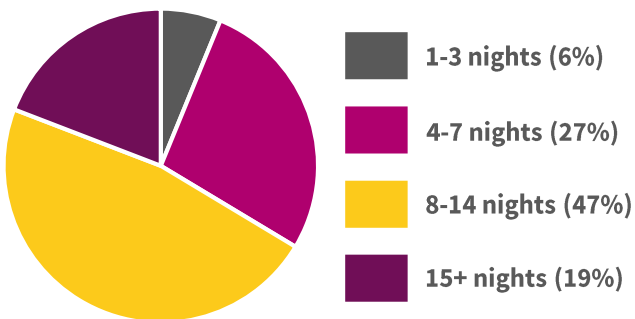
International figures indicate a **decrease** in the volume and value of tourism to the Forth Valley from 2018. Overseas trips and expenditure fell by 12% and 9%, respectively, which was partly due to a very strong tourism performance in 2018. Compared to 2016-2018, in 2017-2019 visits dropped by just 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

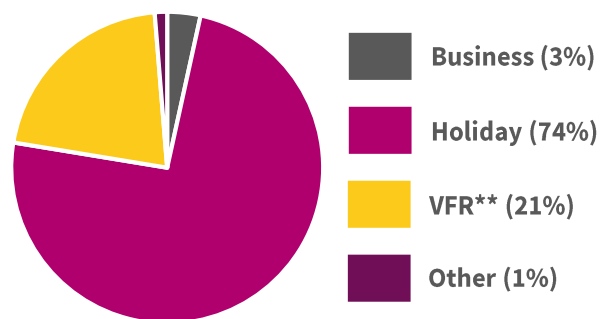
Indicators	Scotland		Forth Valley			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	3,460	-7%	153	-12%	167	-2%
Spend (£M)	2,538	+7%	51	-9%	53	+9%
Nights (000s)	27,385	+8%	798	+26%	701	+18%
Average length of stay	7.9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

Source: IPS, 2019.

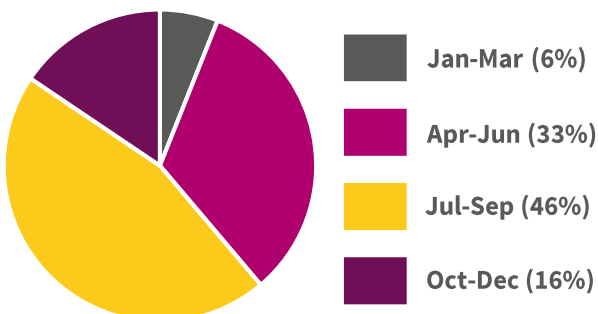
#### Duration of Stay\*



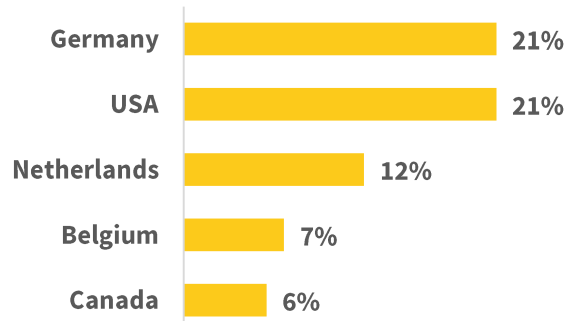
#### Purpose of Travel



#### Seasonality\*



#### Top 5 Overseas Markets



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

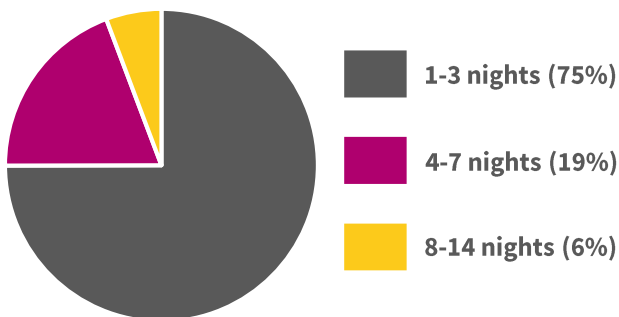
2019 was a good year for domestic overnight tourism in the Forth Valley. **Trips** by British residents **increased** by nearly a half from their 2018 levels which resulted in a 12% **rise in expenditure**. These figures were mostly driven by a **rise in holiday travel** and represented 4.9% of the domestic 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

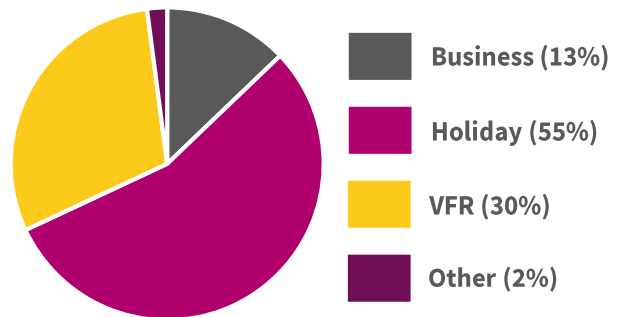
Indicators	Scotland		Forth Valley			
	Key Facts in 2019	% Change 2018/19	Key Facts in 2019*	% Change 2018/19	2017-19 Annual Average	% Change 2016-18/2017-19
Visits (000s)	13,810	+17%	674	+47%	516	-7%
Spend (£M)	3,200	+16%	106	+12%	92	-4%
Nights (000s)	46,413	+15%	1,683	+43%	1,396	-12%
Average length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

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

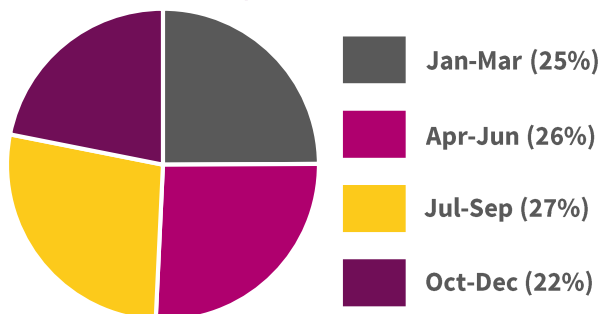
#### Duration of Stay



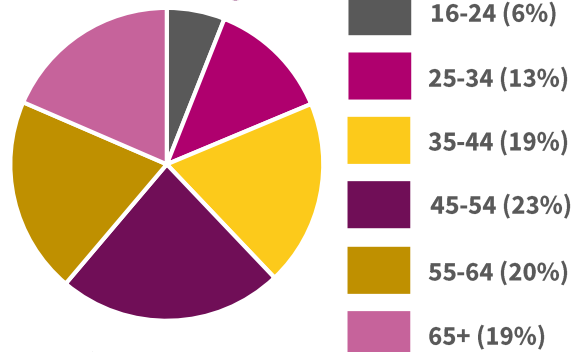
#### Purpose of Travel



#### Seasonality



#### Visitors' Age



Source: IPS. All charts are based on 3-year average data (2017-2019) on visitors to Forth Valley.

# Domestic Day Visits to Forth Valley

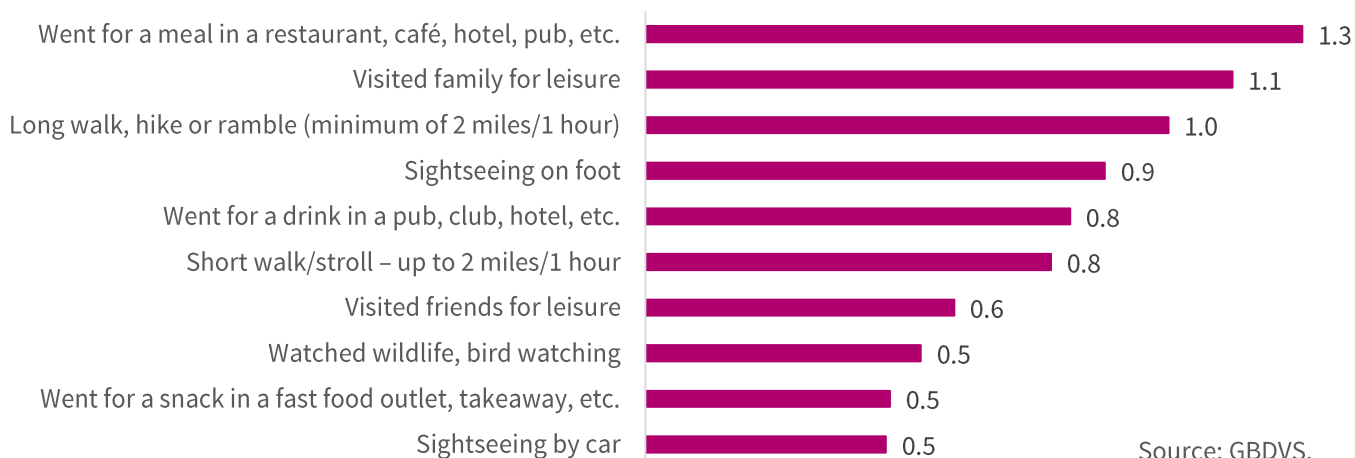
## Tourism Performance and Activities

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

	Visits		Spend	
	2017-19 Average (million)	% Change 2016-18/2017-19	2017-19 Average (£ million)	% Change 2016-18/2017-19
Scotland	140.8	-2%	5,749	+5%
Forth Valley	8.1	-5%	183	-7%
Clackmannanshire	1.2	+18%	44	+76%
Falkirk	2.9	-16%	40	-33%
Stirling	4.0	-2%	100	-11%

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)



Source: GBDVS.



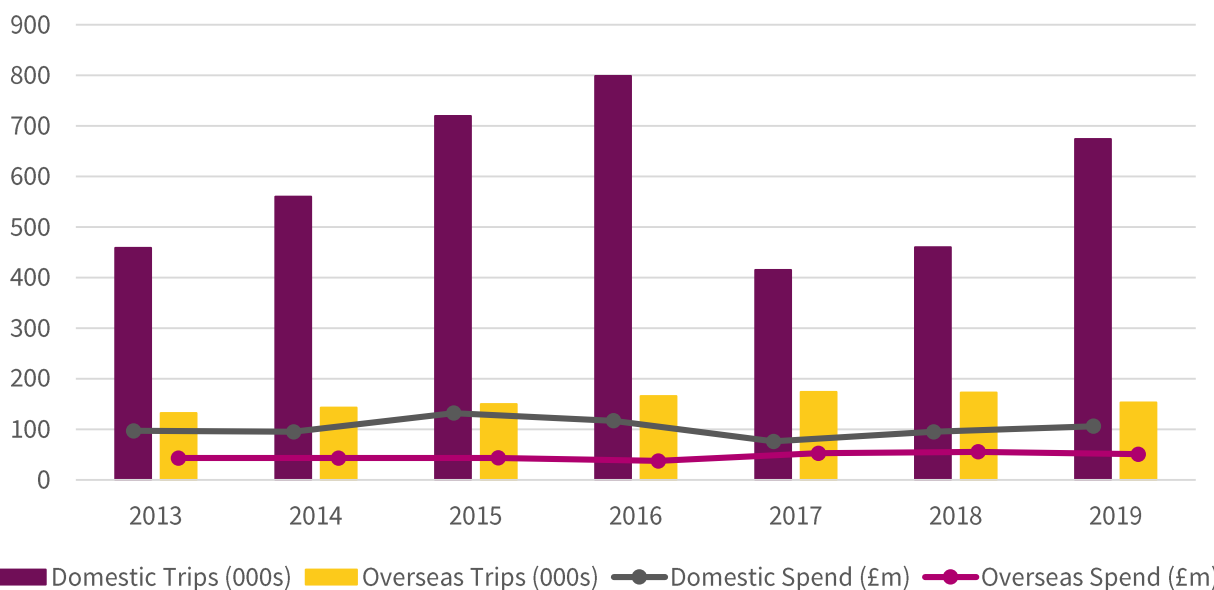


# Visitors to Forth Valley

## 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



Sources: GBTS, IPS.

### Domestic and International Overnight Visits, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Domestic (000s)	459	560	720	799	415	460	674
International (000s)	132	143	150	166	174	173	153
Total Overnight (000s)	591	703	870	965	589	633	827

Sources: GBTS, IPS.

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

	2013	2014	2015	2016	2017	2018	2019
Domestic (£m)	97	95	132	117	76	95	106
International (£m)	43	43	43	37	53	56	51
Total Overnight (£m)	140	138	175	154	129	151	157

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](http://www.visitbritain.org) (Insights & Statistics section).

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### CONTACT US

#### Insight Department

VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH

**0131 472 2222**

**[research@visitscotland.com](mailto:research@visitscotland.com)**

**[visitscotland.com](http://visitscotland.com)**

**[visitscotland.org](http://visitscotland.org)**

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