



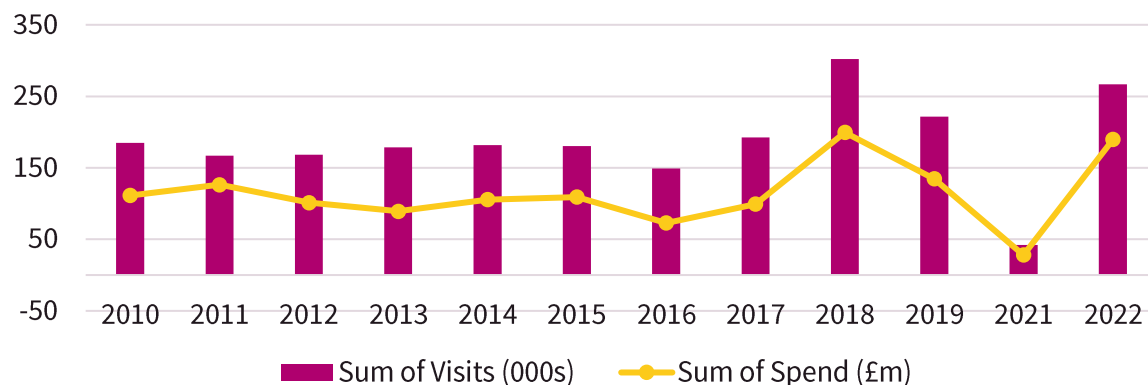
Insight Department:
France Factsheet | 2022

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INSIGHT DEPARTMENT: FRANCE FACTSHEET 2022

In 2022, France was Scotland's second largest international source market by number of visits, second by expenditure and second by number of nights. 2022 saw real recovery from the coronavirus (COVID-19) pandemic and associated travel restrictions in the volume and value of visitors from France to Scotland, which is now on par with 2018 and 2019 levels, suggesting that visitors from France could remain a large market for Scotland in future.

Visits and spend over time



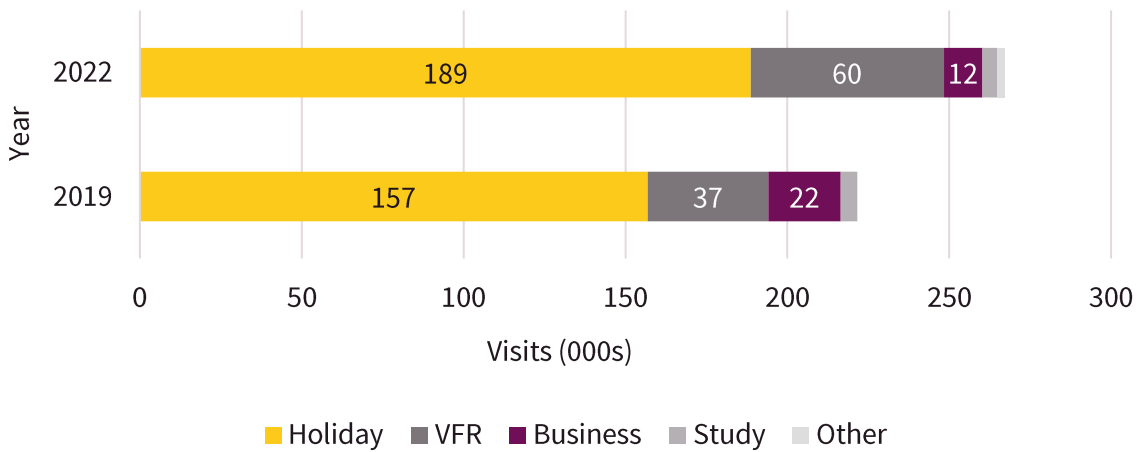
The total number of visits increased by 20% from pre-pandemic levels, reaching the second highest level over the past decade. As well as this, the total nights increased by 32%, while total tourism expenditure increased by 41%. France accounted for 8% of all overseas visitors to Scotland and 6% of all overseas spend.

Year	Visits	Nights	Spend (£m)
2019	222,000	1,723,000	135
2022	267,000	2,272,000	190
Change	20%	32%	41%

Visitors from France spent on average £103 more during their visit compared to 2019. Although the average spend per night was only 7% higher than pre-pandemic, the average length of visit was 9% greater, at 8.5 nights. This is likely due to an increase in the number of French visitors coming to Scotland to see friends or relatives. Such visitors tend to stay for longer periods compared to holidaymakers.

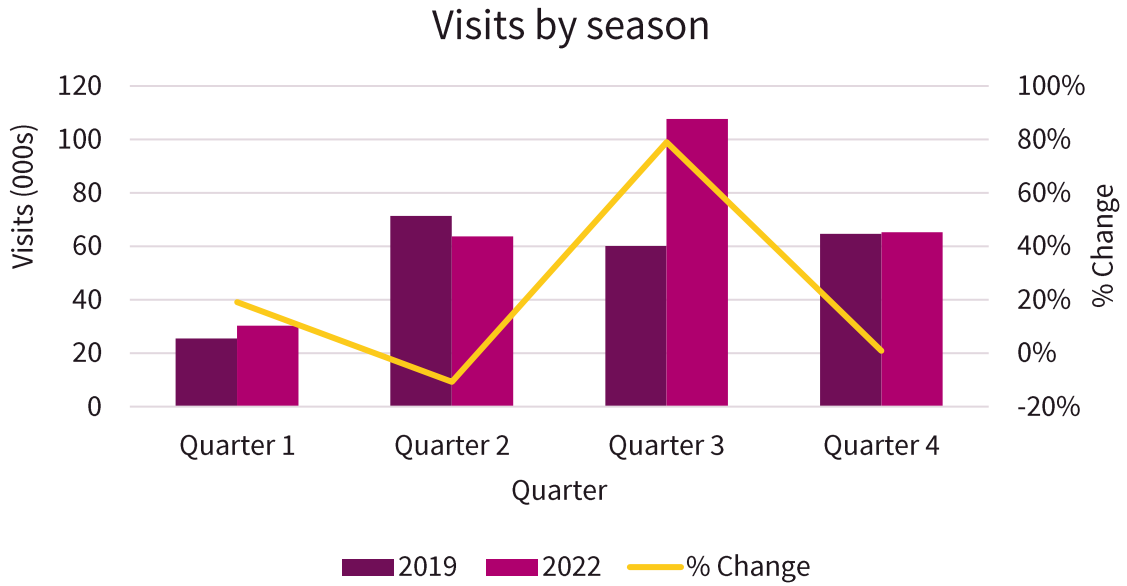
Year	Spend/visit	Nights/visit	Spend/night
2019	£608	7.8	£78
2022	£711	8.5	£84
Change	17%	9%	7%

Visits by purpose of visit



More than two-thirds of all visits were for the purpose of taking a holiday, while around one-fifth were for visiting friends and relatives, and just 4% were business visits. We can see a slight shift in visit intention compared to pre-pandemic times, where visiting friends and relatives has increased from 17% to 22%, and business has decreased from 10% to 4%. The proportions of French holidaymakers and students remain the same as pre-pandemic.

Purpose of visit	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Business	22	10%	12	4%
Holiday	157	71%	189	71%
VFR	37	17%	60	22%
Study	5	2%	5	2%
Other	0	0%	2	1%



In 2022, the proportion of visits to Scotland by French visitors increased quarter on quarter before dipping again in the last quarter of the year. 40% of all visits took place during Q3, between the warmer months of July and September. The largest change in behaviour post-pandemic saw a significant increase in the number of visits taken during Q3. Traditionally, although travellers from France visit Scotland throughout the year, most visitors are seen during the second quarter.

Season	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Quarter 1	25	11%	30	11%
Quarter 2	71	32%	64	24%
Quarter 3	60	27%	108	40%
Quarter 4	65	29%	65	24%

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About this data

All data is sourced from the International Passenger Survey by the Office for National Statistics. Refer to the [ONS website](#) for more on IPS methodology.

Important Notice On Continued Impact of COVID in relation to IPS Data Collection

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some seaports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [visitbritain.org](https://www.visitbritain.org) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see [visitbritain.org](https://www.visitbritain.org) for more information.

Please refer to the [ONS website](#) for the official release and more information on IPS methodology and UK outbound travel and for Full Year 2022 details are on this [ONS page](#).

Appendix

International Passenger Survey 2022

USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS). Information about the survey can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section) or the Office for National Statistics website www.statistics.gov.uk/hub/index.html.

Sample Sizes: Some analysis within this report may be based on small sample sizes. 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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CONTACT US

Insight Department

VisitScotland
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH

0131 472 2222

research@visitscotland.com visitscotland.com

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Back Cover: Erisley pony, the Highlands

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