Executive Summary

Key Facts and Trends

This factsheet provides the latest data on the volume and value of visitors from the International Passenger Survey (IPS), as well as recent information on consumer trends and attitudes.

France was one of the fastest growing markets since 2017 and remained Scotland’s third largest source market measured by number of visits, number of nights and total expenditure in 2018.

Total trips of French residents to Scotland grew by more than a half (+54%), while total nights rose by 13% from 2017. The most significant increase was the one in total expenditure which nearly doubled (+97%) in 2018 as a result of the increases in visitor numbers and in average daily spend (+77%). These figures make 2018 the most successful year in the last decade in terms of inbound tourism from France to Scotland.

While summer is the most popular season to visit Scotland, trips by French residents are more evenly distributed throughout the year than the ones of most overseas markets. More than half of all French travlers are holidaymakers, 28% visit friends or relatives and one in eight comes to Scotland on a business trip. As short-haul visitors, the majority of French residents stay in Scotland less than a week.

France is among Scotland’s top ten international markets in terms of the average number of regions visited (regional spread) over the last ten years. Most popular regions in 2018 were Edinburgh and the Lothians, the Highlands and Islands, and Greater Glasgow and the Clyde Valley.
Latest Information
Visitors from France to Scotland

Key Figures Overview, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Scotland</td>
<td>318,000</td>
<td>+54%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>1,985,000</td>
<td>+13%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£209,476,000</td>
<td>+97%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>6.2 nights</td>
<td>-27%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£106</td>
<td>+77%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£659</td>
<td>+27%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay

- 1-3 nights (30%)
- 4-7 nights (44%)
- 8-14 nights (17%)
- 15+ nights (9%)

Purpose of travel

- Business (12%)
- Holiday (56%)
- VFR* (28%)
- Other (4%)

Seasonality

- Jan-Mar (22%)
- Apr-Jun (29%)
- Jul-Sep (34%)
- Oct-Dec (15%)

Age

- 16-24 (16%)
- 25-34 (19%)
- 35-44 (23%)
- 45-54 (23%)
- 55-64 (12%)
- 65+ (8%)

All charts are based on 3-year average data (2016-2018); * VFR = Visiting friends or relatives. Figures may not sum up due to rounding. Source: IPS.
# International Tourism Figures

## Top 10 Overseas Markets

Visitors from France Compared to Other Overseas Markets: 
Trips, Nights and Spend – Value and Percent of Total, 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips (000s)</th>
<th>%</th>
<th>Spend (£m)</th>
<th>%</th>
<th>Nights (000s)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>492</td>
<td>14%</td>
<td>438</td>
<td>20%</td>
<td>3,907</td>
<td>16%</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>13%</td>
<td>246</td>
<td>11%</td>
<td>2,818</td>
<td>12%</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>9%</td>
<td>209</td>
<td>9%</td>
<td>1,985</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>8%</td>
<td>110</td>
<td>5%</td>
<td>1,220</td>
<td>5%</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>6%</td>
<td>79</td>
<td>4%</td>
<td>1,192</td>
<td>5%</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>5%</td>
<td>153</td>
<td>7%</td>
<td>1,801</td>
<td>7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>5%</td>
<td>86</td>
<td>4%</td>
<td>945</td>
<td>4%</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>4%</td>
<td>117</td>
<td>5%</td>
<td>1,269</td>
<td>5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>3%</td>
<td>74</td>
<td>3%</td>
<td>605</td>
<td>2%</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>3%</td>
<td>40</td>
<td>2%</td>
<td>338</td>
<td>1%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,102</td>
<td>31%</td>
<td>653</td>
<td>30%</td>
<td>8,158</td>
<td>34%</td>
</tr>
</tbody>
</table>

| Total       | 3,538        | 100%| 2,206      | 100%| 24,237        | 100%|

Source: IPS, 2018. Figures may not sum up due to rounding.
Inbound Tourism | UK & Scotland
Visitors from France

Trips of French Residents to the UK and Scotland: Total and Average Figures, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>Total visits</td>
<td>3,694,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>44% Holiday</td>
</tr>
<tr>
<td></td>
<td>30% VFR</td>
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<tr>
<td></td>
<td>20% Business</td>
</tr>
<tr>
<td></td>
<td>6% Other</td>
</tr>
<tr>
<td>Total nights</td>
<td>18,874,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£1,384,895,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>5.1 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£73</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£375</td>
</tr>
</tbody>
</table>

Source: IPS. Figures may not sum up due to rounding.
*3-year average (2016-2018).

The number of French residents visiting the UK decreased by 262,000 (-7%) in 2018. There was a similar drop in the number of total nights (nearly 2m less, or -9%), while total spend decreased more slightly (£40m less, or -3%) from 2017.

This decline was not experienced in Scotland, where total visits increased significantly by 112,000 (+54%) and total nights rose by 221,000 (+13%) in 2018. The increase in French visitors, coupled by their higher average daily spend in Scotland, resulted in a substantial growth in total expenditure which nearly doubled (£103m more, or +97%) from 2017. While going on a holiday is still the most popular reason to travel to Scotland, an increasingly larger proportion of French tourists come to visit friends or relatives.

The great rise in spend made France Scotland’s third biggest market measured by number of visits and nights, but also total expenditure. Whereas France made up 5% of the total overseas spend in 2017, this increased to 9% in 2018.

In 2018, France was

The UK’s
• 2nd largest source market measured by number of visits
• 2nd largest by number of nights
• 3rd largest by expenditure

Scotland’s
• 3rd largest international source market measured by number of visits
• 3rd largest by number of nights
• 3rd largest by expenditure

Source: IPS, 2018.
French Visitors Heat Map
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

Edinburgh & the Lothians

Highlands & Islands

Greater Glasgow, Clyde Valley

Darker areas = more visitors
Source: IPS, 2018.

French visitors tend to spend less time in Scotland than long-haul tourists, but they still travel a lot within the country. Out of all international markets, France ranks \textit{tenth in regional spread} for the period \textbf{between 2009 and 2018} (1.57 regions* per visit on average).

On average, each French visitor explored \textbf{1.48} Scottish regions during their stay in 2018. The total international average for the same period was \textbf{1.41} regions per visitor. Edinburgh and the Lothians remained the most frequented region in 2018 (252,000 visits). An increase in French visitors to the Highlands and Islands made it the second most popular region (73,000 visits), followed closely by Greater Glasgow and the Clyde Valley (67,000 visits).

\textit{*Due to sample size and International Passenger Survey’s (IPS) methodology in the collection and publishing of tourist data, the flow of visitors within Scotland is analysed at a regional level. Each region consists of council areas as listed below.}

\textbf{Regional Map Legend}

\textit{Ayrshire & Arran} = East Ayrshire, North Ayrshire, South Ayrshire; \textit{Dumfries & Galloway} = Dumfries and Galloway; \textit{Dundee & Angus} = Angus, Dundee City; \textit{Fife} = Fife; \textit{Grampian} = Aberdeen City, Aberdeenshire, Moray; \textit{Highlands & Islands} = Highland, Na h-Eileanan Siar, Orkney Islands, Shetland Islands; \textit{Edinburgh & the Lothians} = City of Edinburgh, East Lothian, Midlothian, West Lothian; \textit{Perthshire} = Perth and Kinross; \textit{Scottish Borders} = Scottish Borders; \textit{Greater Glasgow, Clyde Valley} = East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire; \textit{Loch Lomond, Stirling, Trossachs, Argyll} = Argyll and Bute, Clackmannanshire, Falkirk, Stirling.
Visitors from France to Scotland
Historical Trend Information | 2009 - 2018

2018 was the **most successful year in the last decade** in terms of visits, stay and spend by French residents traveling to Scotland. Following the 2013-2015 plateau and the subsequent decline, the trend of growth continued in 2018 which marked massive increases in visits (+104%), nights (+71%) and total expenditure (+179%) compared to 2016 levels. Scotland’s total international inbound market grew by 29% in terms of visits, 14% in terms of nights and 19% in terms of total spend between 2016 and 2018, making France one of the fastest growing markets in 2018.

**Inbound Tourism Volume and Value Trend, 2009-2018**

![Graph showing the trend of visits and spend from 2009 to 2018.](image)

**Total Visits, Nights & Spend, 2009-2018**

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</thead>
<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>274</td>
<td>198</td>
<td>169</td>
<td>174</td>
<td>193</td>
<td>191</td>
<td>196</td>
<td>152</td>
<td>206</td>
<td>318</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>1,847</td>
<td>1,849</td>
<td>1,166</td>
<td>1,243</td>
<td>1,326</td>
<td>1,403</td>
<td>1,584</td>
<td>1,160</td>
<td>1,764</td>
<td>1,985</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>98</td>
<td>119</td>
<td>130</td>
<td>108</td>
<td>100</td>
<td>111</td>
<td>118</td>
<td>75</td>
<td>106</td>
<td>209</td>
</tr>
</tbody>
</table>

Source: IPS.
Average French Visit
Historical Trend Information | 2009 - 2018

Like the majority of international visitors to Scotland, French tourists shortened their trips in 2018. Average length of stay decreased by two and a half days compared to 2017 to reach its lowest in the last ten years. However, a big increase in average daily spend (£46 more, or +77%) resulted in a £142 rise (+27%) in average spend per trip, the highest since 2011. In 2018, French travellers to Scotland stayed 0.7 fewer nights and spent £35 more per trip compared to the average overseas visitor.

Average Length of Stay and Spend Trend, 2009-2018

Source: IPS.

Average Length of Stay, Daily and Total Spend, 2009-2018

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</tr>
</thead>
<tbody>
<tr>
<td>Average Length of Stay (Nights)</td>
<td>6.7</td>
<td>9.3</td>
<td>6.9</td>
<td>7.1</td>
<td>6.9</td>
<td>7.3</td>
<td>8.1</td>
<td>7.6</td>
<td>8.6</td>
<td>6.2</td>
</tr>
<tr>
<td>Average Spend per Day (£)</td>
<td>53</td>
<td>64</td>
<td>112</td>
<td>87</td>
<td>75</td>
<td>79</td>
<td>75</td>
<td>65</td>
<td>60</td>
<td>106</td>
</tr>
<tr>
<td>Average Spend per Visit (£)</td>
<td>358</td>
<td>599</td>
<td>772</td>
<td>623</td>
<td>517</td>
<td>581</td>
<td>605</td>
<td>496</td>
<td>517</td>
<td>659</td>
</tr>
</tbody>
</table>

Source: IPS.
Outbound Tourism
Visitors to France

Trips and Spend of UK and Scottish Residents in France, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total visits to France</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>8,556,000</td>
<td>-3%</td>
</tr>
<tr>
<td>Scotland</td>
<td>371,000</td>
<td>+12%</td>
</tr>
<tr>
<td><strong>Total spend in France</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£4,285,141,000</td>
<td>+8%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£199,514,000</td>
<td>+5%</td>
</tr>
<tr>
<td><strong>Average spend per visit</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£501</td>
<td>+11%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£538</td>
<td>-6%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

While 2018 marked a decrease in visits by UK travellers to France (306,000 less, or -3%), total expenditure rose by £301m (+8%) from 2017. The UK remained France's **largest tourism source market** measured by number of visitors in 2018.

The average UK resident spent 7.3 nights and £69 per day while in France which is in line with the average figures for trips to Europe. More than two-thirds of all UK visits to France were undertaken by holidaymakers, and 17% by people visiting friends or relatives. Roughly one out of ten travellers went on a business trip.

As a destination, France amounted to 11.9% of the total UK outbound tourism in terms of visits and 9.4% in terms of expenditure in 2018. Its share of Scotland’s overseas tourism was smaller but still considerable, constituting **8.4% of all international trips** undertaken by Scottish residents, and **6.6% of their total overseas spend**.

In 2018, trips by Scottish residents to France **grew by 39,000 (+12%)** to reach 371,000. Total expenditure also increased, by £10m (+5%). This adds up to an average spend per visit of £538 in 2018, down £35 from 2017.

In 2018, France was

**The UK’s**
- 2nd most popular destination measured by number of visits
- 3rd by expenditure

**Scotland’s**
- 2nd most popular destination measured by number of visits
- 3rd by expenditure

Source: IPS, 2018.
How Visitors from France View Scotland

Scotland is perceived to be full of myths and legends that inspire a rich and authentic experience.

In research in 2015, which explored the key benefits of a holiday in Scotland, the following key tangible and more emotional benefits of a holiday in Scotland stood out for French consumers.

| Scenery and Landscape | French consumers told us that they associate Scotland with huge vistas and dramatic views. They expect unspoilt, remote landscapes that allow them to escape from reality, where at home, streets are maybe narrow and crowded. The openness of the land is thought to conceal “secret places” that are waiting to be discovered. The element of discovering places that are “hidden” is perceived to be a strong benefit of a holiday in this country. |
| History and Culture | Scotland’s history and culture is also a strong motivator for French visitors. In addition to scenery, they expect that castles and various historical sites will add to the authentic experience of the legends and the undiscovered in Scotland. There is also a strong expectation that Scotland has an atmosphere of its own – a sense of history and a mythical quality stands out. |
| People | They expect to meet Scottish people who are warm and welcoming due to their reputation for being friendly. This enhances their holiday experience. |
| A sense of connection | Scotland has a special appeal for some French people, linked to a broad association around the historic “Auld Alliance” and a perception of greater affinity with Scottish people. |

Source: VisitScotland Research 2014-2017
Recent Consumer Trends and Attitudes

**MOTIVATIONS TO VISIT SCOTLAND**

- **Scenery & landscape 81%** (survey average 50%)
- **History & culture 56%** (survey average 33%)
- **Always wanted to visit 46%** (survey average 15%)
- **Scotland’s reputation for friendly people 38%** (survey average 15%)
- **To visit cities 30%** (survey average 15%)

Scenery and landscape is a strong motivator for visitors from France, which tends to be higher across the European markets in comparison to long-haul, and in particular, they mention Scotland’s reputation for friendly people.

**TRANSPORT TO SCOTLAND**

- 56% arrived directly by plane from France. The most popular airports to arrive into Scotland were:
  - Edinburgh 69%
  - Glasgow 20%
  - Aberdeen International 6%
- 15% arrived by plane (indirect):
  - Schiphol 26%
  - Heathrow 18%
  - Birmingham 13%

**CONNECTIONS TO SCOTLAND**

- **33%** of visitors from France had a connection to Scotland. The most common connections were:
  - No personal connections but had visited many times 11%
  - Family live in Scotland 8%
  - Friends live in Scotland 7%

European markets typically have lower personal connections to Scotland than long haul markets. French visitors were most likely to report a connection to Scotland through previous visitor experience.

**PLANNING & BOOKING**

On average, visitors from France tend to plan 4 months in advance.

- Planning: 17.7 weeks
- Travel booking: 12.9 weeks
- Accommodation booking: 10.2 weeks

French visitors are likely to use multiple types of information in planning their holiday, particularly websites, such as search engines and review sites. They are also more likely than average to rely on printed travel guide books.

Source: Scotland VisitorSurvey 2015/2017
TOP 5 ACTIVITIES IN SCOTLAND

- Sightseeing by car/coach/on foot 85% (survey average 74%)
- Centre based walking (i.e. around a town centre) 85% (survey average 45%)
- Visited cities 79% (survey average 42%)
- Visited castle/historic house 77% (survey average 60%)
- Visited a country park/garden 76% (survey average 43%)

Typically visitors from France are very interested in history, heritage and culture and wildlife.

Further down the list of activities, but notably higher for visitors from France than others were:

- Visited a TV/film location 17%
- Attended Highland Games 13%

Source: Scotland Visitor Survey 2015/2017

ACCOMMODATION

Accommodation Preferences:

- Hotel 48% (survey average 41%)
- B&B/GH 41% (survey average 20%)
- Airbnb 14% (survey average 5%)
- Self-catering 13% (survey average 22%)
- Camping 13% (survey average 6%)

Aspects Important in Choosing Accommodation:

- Value for Money 75%
- Location 44%
- Quality star grading 34%
- Availability of free Wi-Fi at accommodation 30%
Visitors from France recorded high levels of satisfaction across most aspects of the visitor experience in Scotland.

<table>
<thead>
<tr>
<th></th>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall rating</td>
<td>8.8</td>
<td>67%</td>
</tr>
<tr>
<td>of Holiday Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(scale 1-10)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>9.0</td>
<td>68%</td>
</tr>
</tbody>
</table>

56% strongly agree that ‘Scotland is a country worth visiting more than once’

37% strongly agree that ‘they were made to feel very welcome’

37% strongly agree that ‘they enjoyed finding out about the history and culture of the destination when on holiday’

Areas of the visitor experience which recorded mean scores below 8 include:

- Value for money of attractions
- Availability of local produce
- Value for money of eating out
- Mobile phone signal coverage
- Availability of 3G/4G
- Availability of free Wi-Fi

Source: Scotland Visitor Survey 2015/2017
Popular media channels

Research with consumers from France on VisitScotland’s database has provided examples of key media channels used by these consumers.

**Key Websites Used**
- Google
- Facebook
- Yahoo
- Orange.fr
- Le Monde
- YouTube
- Windows Live

**Key Social Media Accounts**
- Facebook
- WhatsApp
- YouTube
- TripAdvisor
- Google+
- LinkedIn
- Pinterest
- Instagram
- Twitter
- Viadeo

**Key Newspapers Read (online or print)**
- Le Monde
- Ouest-France
- Le Figaro
- 20 Minutes
- Libération
- Le Parisien

**Key Magazines Read (online or in print)**
- Express
- Geo
- Lepoint
- Télérama
- Femme Actuelle
- Marianne
- Version Femina
- Pleine vie
- L’Obs
- Le Figaro magazine

**Influential TV Programmes for Travel**
- Outlander
- Braveheart
- James Bond Skyfall
- Échappée Belle

Source: VisitScotland Research 2014-2017
Barriers to Travel

Although there are many reasons why French visitors are drawn to Scotland, we need to be aware of the barriers which may be in the minds of visitors when considering their holiday destination.

• Cost is considered a critical factor in choosing a holiday destination, and some may perceive Scotland as an expensive choice. Satisfaction with value for money of accommodation and eating out received lower scores than other areas of the visitor experience within the most recent Scotland Visitor Survey.

• The weather is undoubtedly a barrier for some.

• French visitors are more likely to participate in local food and drink activities, and say they enjoy learning about local food. However, their expectations of food in Scotland tend to be low before they have visited.
Appendix

International Passenger Survey 2018

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: Analysis of sub-groups, such as trips by purpose or demographic group, relies on small 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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