In 2018, France was Scotland’s 3rd largest international visitor market. Thanks to a high propensity to return to Scotland and an important number of holidays throughout the year, French visitors offer great potential for Scotland year-round.

**VISITS IN 2018**
318,000

**VALUE**
£209M

**AVERAGE SPEND PER VISIT**
£659

**FLIGHTS**
- Paris CDG to Aberdeen
- Basel Mulhouse Freiburg
- Lyon
- Marseille
- Nantes
- Paris CDG
- Paris Orly
- Toulouse
- Brussels (BE), Geneva (CH)
- Paris CDG to Glasgow

**FERRY ROUTES**
- Roscoff, St Malo, Caen, Cherbourg, Le Havre, Calais, Dunkerque, Amsterdam to British seaports.

**SEASONALITY OF TRIP**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Oct-Dec</th>
<th>Jul-Sept</th>
<th>Apr-Jun</th>
<th>Jan-Mar</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>15%</td>
<td>34%</td>
<td>29%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**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%
- Visiting friends and relatives: 28%
- Other: 4%

**TOP DRIVERS OR MOTIVATORS**
- Scenery & Landscapes
- History & Culture
- “Always wanted to visit”

**TOP ACTIVITIES**
- Sightseeing, centre based walking, cities, castles/historic houses

**ORIGIN OF VISITORS**
(TOP 3)
- Greater Glasgow & Clyde Valley
- Paris
- Lyon

**MOST VISITED REGIONS**
- Highlands & Islands
- Edinburgh & The Lothians
- PACA
- Lyon Region
- Paris Region

**PLANNING & BOOKING TIMELINE**
- Planning lead time: 4 months
- Booking lead time: 3 months

**PRIORITY SEGMENTS**
- Buzzseekers
- Explorers

Source: VisitScotland research 2018
Source: Scotland Visitor Survey 2015/16
Source: IPS 2018
Source: As per VisitBritain research
Everyone has a bank of holiday hopes and ideas in their heads that bubble away, constantly being added to over time. It’s almost like a holiday soup. When it comes to planning a holiday people take an idea from this soup and do some basic research to see if it’s feasible.

If the idea doesn’t suit, it goes back into the soup and they try another. Within this process, four main patterns of planning behaviour can be identified and these are what we are using to inform our website: visitscotland.com

**CUSTOMER JOURNEY**

**IDEA ACCUMULATION**
- Media & cultural influences
  - Hearing about / looking at the holidays of friends and family

**CONCEPT FORMING**
- Going through available options and considering which best meet holiday needs
  - Weighing up the feasibility and envisioning the trip

**CONCEPT BUILDING**
- Deciding whether to go ahead and book it, or leave it for another year
  - Forming a whole picture of the desired trip

**EXECUTING THE PLAN**
- Building the holiday
  - Book travel, accommodation and some activities that require pre-booking
  - First stages of planning: taking time off, arranging pet care etc

**THE HOLIDAY**
- Research attractions, activities and restaurants
- Share photos and “check ins” on social media
- Leave reviews

**MARKETING ACTIVITY**
- VisitScotland paid media and PR
- VisitScotland and partner paid media and PR
- VisitScotland email activity
- Intermediary inspiration activity
- VisitScotland.com
- VisitScotland paid search and SEO
- VisitScotland influencer / community activity
- VisitScotland emails
- VisitScotland social channels