

SPOTLIGHT ON OUR FRENCH VISITORS TO SCOTLAND

SOURCE: SCOTLAND VISITOR SURVEY

Spotlight on the French visitor to Scotland (1)

37% repeat visitors
(of which 7% take trips in Scotland regularly)



63% first time visitors

28% over age 55

21% aged 25 to 34

8% under 24

85% toured Scotland staying in 2 or more places



8% stayed in one urban, city or town location



71% were in employment
18% were retired

13% were on a trip of a lifetime



70% were on holiday as a couple

9% were travelling solo

21% travelled with child/children

3% travelled with pets or animals

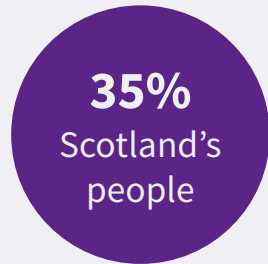


Spotlight on the French visitor to Scotland (2)

Top motivations for visiting Scotland

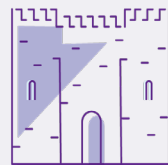
Scotland's scenery, Scotland's people and outdoor activities are very strong drivers for French market.

Scotland's legends and stories stand out as stronger driver for our French visitors than other global markets.



52%
took part in a food and drink experience

Key attractions visited



86%
a castle or fort



77%
a cathedral, church, abbey, place of worship



70%
a museum or art gallery



71%
a country park or garden

Top activities undertaken



62%
viewed architecture and buildings



49%
hill walk, mountaineering, or hike



49%
shopping



34%
watching wildlife or bird watching



34%
short guided tour



32%
boat trip



The visitor journey: French visitors to Scotland

Inspiration



Planning



Booking



Getting to Scotland



Trips in Scotland



Post trip



Sources of inspiration

64% personal recommendations

44% digital information

38% film, TV or books featuring Scotland

(net figures)



Started planning 17.5 weeks in advance prior to arrival

Sources used to plan

46% VisitScotland's website

34% accommodation providers

29% transport providers

52% travel intermediaries (net)

Started booking 13.6 weeks in advance

Accommodation:

38% booked directly with providers

68% booked via travel intermediaries

Transport to Scotland:

63% booked directly with providers

33% via travel intermediaries

Paid Activities:

34% booked in advance

Transport used to travel to Scotland from France

63% by plane:
56% direct
7% indirect

27% public transport (ferry, coach, train)

16% by car

Accommodation used

67% hotel, motel or inn

41% B&B/GH

30% self-catering

27% Caravan, camping or glamping

Net serviced accom:

67%

Net non serviced accom

71%

77% rated their trip 9 or 10 out of 10

78% are likely to recommend Scotland (9 or 10 out of 10)

68% are quite or very likely to return in the next 5 years

1. French visitor profile

The profile of French visitors was well spread across the 25 to 74 age groups. Those aged 25 to 44 (39%) were more prevalent compared to other European countries.

71% of French visitors were in work, a lower proportion of visitors in employment compared to other European markets .

6% of French respondents reported they had a long-term health condition, disability or infirmity.

70% of French visitors were on holiday as a couple, 9% were travelling solo, and 21% travelled with a child or children. 3% travelled with pets.

Summary



2. French visitor and trip profile

63% were first time visitors to Scotland.

64% of French Visitors reported that their trip to Scotland was a regular holiday.

13% described their holiday as a trip of a lifetime, similar to the European average.

85% of French visitors reported touring around Scotland, staying in two or more places on their trip.

8% of French visitors stayed in one urban location, a lower proportion compared with visitors from Germany (15%), Spain/Italy (25%).

Summary



3. Holiday motivations and reasons for choosing Scotland

Scotland's scenery, history and culture and outdoor activities were the key motivations for visits. Scotland's reputation of friendly and welcoming people were also one of the main reasons why French visitors decided to come to Scotland.

Visitors from France were more likely to be attracted by Scotland's stories or legends (20%), compared to all other markets (average 6%).

Personal recommendations (64%) was the most influential source of inspiration, followed by digital resources (44%).

Summary



4. Holiday planning and booking

On average, visitors from France started planning their holiday or short break to Scotland 17.5 weeks in advance and booked their trip 13.6 weeks prior to arrival. Both the planning and booking lead time is shorter than for other major European markets.

Of those visitors who researched and planned their trips, the VisitScotland website was mentioned by almost half (46%). 52% used a type of travel intermediary for holiday planning. This figure is similar to the European market average (55%).

Travel intermediaries play a significant role in accommodation booking with 68% citing their use. 63% French visitors booked their travel to Scotland directly with the transport provider.

34% French visitors booked activities/experiences prior to arrival, lower than the European average (44%). Of those that did book in advance, 84% booked directly through the provider's website.

Summary



5. Transport and accommodation

63% of French visitors travelled to Scotland by plane, almost half on a direct flight.

27% travelled to Scotland by public transport (ferry, coach, train).

16% travelling to Scotland by car.

62% used public transport when touring around Scotland (public bus, ferry, train, or tram within areas visited). Travelling by car was also popular (65%).

54% of French visitors stayed in a hotel during their trip, while 41% stayed in a guest house or B & B, followed by self-catering accommodation (30%).

Summary



6. Activities, events, attractions, food and drink

98%

of French visitors to Scotland visited at least one type of attraction, similar to international average.

92%

of French visitors participated in at least one type of activity (higher than German visitors 86%)

52%

of French visitors took part in at least one food and drink experience (higher than European average but lower than long haul market percentage of participation)

45%

of French visitors participated in at least one type of event (higher than German and Dutch visitors).

Summary



7. Holiday satisfaction and likelihood to return

47% of French visitors rated their holiday in Scotland as a perfect 10 out of 10 experience.

78% of French visitors are likely to recommend Scotland (9 or 10 out of 10).

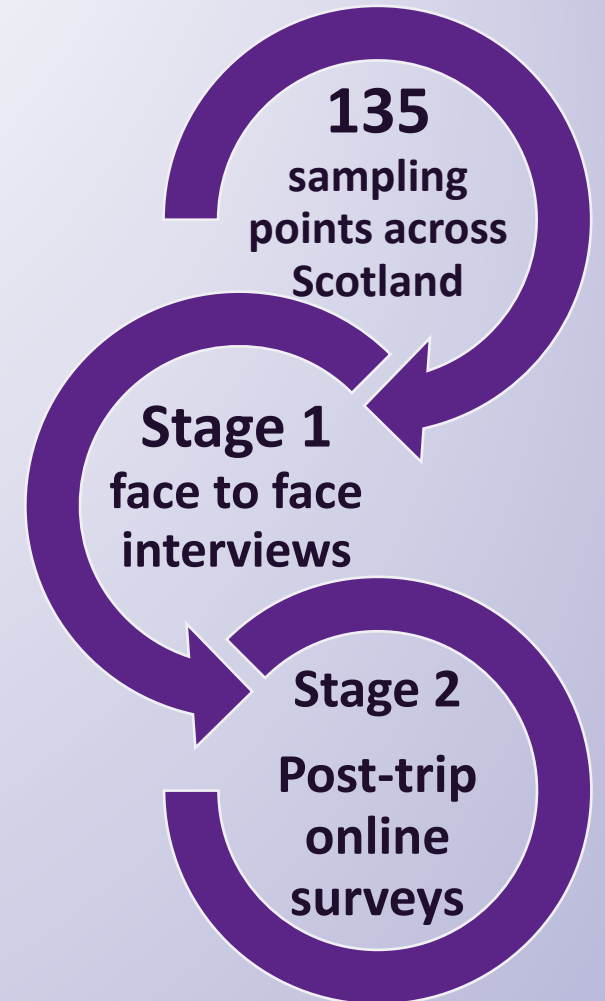
68% of French visitors said they are quite likely or very likely to return to Scotland in the next five years, similar statement made by repeat visitors (71%) and first timers (67%).

Summary



Scotland Visitor Survey: Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic.
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey.
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited.
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023.
- Sample sizes for visitors from France (leisure overnight visitors only):
First stage face to face survey sample for visitors from France: n=409
Second stage follow-up online survey sample for. France: n=91
- Please note the data for individual European countries is unweighted.



1. Definitions used

Within this report where we explore aspects of planning and booking, we refer to the use of “travel intermediaries”.

Travel intermediaries refer to a range of types of organisations that resell tourism products onto end consumers. They may sell individual products (such as hotels, travel or activities) or they may sell packaged products which include all or some of these elements.

Broadly travel intermediaries include travel agents, tour operators, online marketplaces and price comparison websites.

2. Definitions used

All types of travel intermediaries

Travel agents who offer advice through personal interaction, such as high street shop or telephone (e.g., TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT)

CODE

3

Personal travel agent or advisor (someone who creates bespoke tailor made holidays specifically for you)

4

Online only travel agents who offer a wide range of travel deals online, such as flights, accommodation, car hire, etc. (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

5

Online tour operators (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

6

Online marketplace – a website or app that connects the traveller with accommodation and experience providers directly (e.g., Airbnb, VRBO)

7

Price comparison websites – a website or app that aggregates travel deals, such as flights and accommodation, from other sites (e.g. Skyscanner, Kayak.com, Priceline.com, lowestfare.com)

8

Peer review websites – a website or app that collates reviews from other travellers (e.g. TripAdvisor)

9

Specialist travel agents or tour operators who focus on specialist interest travel and tours, e.g., golf, walking, cycling, cruises

10

Market specific examples in the questionnaire:

Code 3 – Travel agents

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- France – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

Code 5 - Online Travel agents

- France – Booking.com, Expedia, HRS
- France – Booking.com, Expedia, Voyage Privé
- Spain - Logitravel, eDreams, Booking.com
- Italy – Expedia, eDreams, Booking.com
- All others - Booking.com, Expedia

Code 6 – Online tour operators

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- France – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

3. Accommodation definitions

Serviced accommodation:

Hotel/Motel/Inn

Guest House/B&B

Restaurant with rooms

Serviced Apartment

Non serviced accommodation:

Self catering accommodation (whole of property or unit)

Friend's or relatives homes

Rental of private home (room only)

Second home or time share

Caravan, camping and glamping

Private home:

Staying with friends/relatives

Rental of a room in someone's private home

Second home

Caravan, camping and glamping:

Campervan or motorhome

Camping (campsite or wild)

Touring or Static Caravan

Glamping or alternative accommodation

All 'other' accommodation types are not included in the above nets i.e. hostel, farmhouse, other.



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