Market and Trade Profile: France

April 2021

Destination Bristol ©Gary Newman

Overview

- **‘Chapter 1: Inbound market statistics’** provides insights on key statistics about French travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **‘Chapter 2: Experiences and perceptions’** features details about what visitors from France are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the French in general are also highlighted.
- **‘Chapter 3: Understanding the market’** takes a close look at consumer trends in France, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach French consumers are indicated, too.
- **‘Chapter 4: Access and travel trade’** shows how people from France travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the French travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that most of this report refers to the market conditions for travel from France to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

Contents

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Executive Summary

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1: Inbound market statistics

Chapter summary

- Despite the shorter term impact from the COVID-19 pandemic, the French outbound market is forecasted to account for more than 77 million trips abroad with at least one overnight stay by 2030. In 2019, the UK was the third most popular destination behind Spain and Italy for such trips.
- The French rank globally in 5th place for international tourism expenditure with more than US$51.7bn spent on outbound travel in 2019.
- France is the UK's largest European source market, and second largest globally by volume of visits. In terms of visitor spending it ranks fourth (2019).
- The French market offers excellent, very balanced seasonal spread.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the nights spent in the UK in 2019.
- In 2019, 72% of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 21%. On average, visitors residing in France spent £393 per visit in the UK, on holiday this rises to £467 per visit.
- Ireland (41%), Spain (30%) and Germany (23%) were the most considered competitor countries by French visitors to Britain.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, VisitBritain/IPSOS 2016

2019:
£1.4bn spent in the UK making France the 4th most valuable source market

2: Experiences and perceptions

Chapter summary

- Almost two thirds of French visits to the UK feature dining in restaurants; two in five enjoy going to a pub. Close to three in five French visits involve shopping.
- The number one pastime for the French on holiday in the UK is sightseeing (72%) and around half allow time for visiting museums or art galleries, or parks and gardens, and almost as many go to castles or historic houses. A third of French holidaymakers visit religious buildings.
- More than one in four French on holidays in the UK like to socialise with locals or go on a guided tour. Many of them also enjoy walking in the countryside or go to the coast while here.
- The French rate the UK highly for contemporary culture and culture overall, vibrant cities, sports, and cultural and built heritage, and associate museums, music, film and sports most strongly with the UK.
- 98% of French visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- Asked for reasons which would encourage the French to travel back to the UK for a holiday, half said that the UK is easy for them to get to.

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019 and 2020

The French rank the UK 4th for contemporary culture and culture overall out of 50 countries

3: Understanding the market

Chapter summary

- The most influential source for destination choice for French visitors are friends, family and colleagues followed by travel guidebooks and information from search engines and websites providing traveller reviews and price comparison.
- In a normal year, a large proportion of French holiday visitors tend to start thinking about their trip early with 42% doing this half a year or more in advance, but more than half book their trip within two months before arrival.
- The majority of French travellers book part or all of their leisure trips online. However, when they booked accommodation and transport combined, close to one-in-five visitors made the booking face-to-face.
- Almost two in five of the French state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- Despite the pandemic, 60% of French people aged 15 or over went on a leisure trip in 2020 and they remain keen to travel once it is possible. VisitBritain's international recovery sentiment tracking shows 79% of the French considered taking an international leisure trip in 2021, showing strong desire to travel.

Source: VisitBritain/IPSOS 2016, Tour Hebdo and Raffour Interactif/Opodo 2021, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

Easy access from France and British culture: The most important draws for French holiday visitors

4: Access and travel trade

Chapter summary

- Access to Britain is easy. 45% of French visits arrive by plane, followed by 39% of French visits made via the Channel Tunnel (which links the UK and France) by rail or car, 16% come by ferry.
- The volume of French visits arriving by plane overtook arrivals through the Channel Tunnel in 2017 and has led since.
- Annual seat capacity grew to around 7.5 million seats in 2019, before it declined sharply by 68% in 2020 as a result of the COVID-19 pandemic. The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.
- The regional spread of French visitors is supported by the connectivity to many regional airports in the United Kingdom.
- The French travel market is very complex and fragmented. Prior to the COVID-19 pandemic, the volume of passengers travelling with tour operators increased slightly, but there is a faster-paced trend towards direct bookings in the French market.
- The French trade is currently undergoing fundamental change as a result of the pandemic, but comprehensive data is yet to emerge which is why most of the data presented in this section refers to the pre-COVID situation.

Source: Apex, International Passenger Survey by ONS

45% of French travel to the UK is by plane, 39% through the Channel Tunnel.

Inbound market statistics

Chapter 1

1.1 Key statistics

Key insights

- France is the UK's largest European source market, and second largest globally by volume of visits. In terms of visitor spending it ranks fourth (2019).
- In 2019, the UK was the 3rd most popular destination of French outbound overnight travel globally behind Spain and Italy, ahead of Morocco, Germany and the USA.
- In 2019, the UK welcomed almost 3.6 million visits from France contributing £1.4 billion in visitor spending across the UK. On average, visitors residing in France spent £393 per visit in the UK; amongst those on holiday, £467 per visit.
- The French market provides excellent, very balanced seasonal spread.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the nights spent in the UK in 2019.
- The most popular activities undertaken by French travellers in the UK include dining, shopping, sightseeing, visiting parks and gardens, visiting museums and art galleries as well as socialising with the locals.
- 12% of French visits were bought as part of a package or an all-inclusive tour, slightly above the all-market average but most French visits to the UK remain independently organised.

France is the UK's largest European source market by volume of visits. (2019)

Source: International Passenger Survey by ONS, Oxford Economics

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	51.7
Global rank for international tourism expenditure	5
Number of outbound overnight visits (m)	55.8
Most visited destination	Spain

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+3%	-2%	+33%
2009	3,472	17,250	1,048
2010	3,433	17,721	1,091
2011	3,562	18,475	1,142
2012	3,763	18,687	1,495
2013	3,780	18,352	1,291
2014	3,867	20,155	1,343
2015	3,909	21,158	1,389
2016	4,040	21,357	1,356
2017	3,783	19,779	1,360
2018	3,592	18,495	1,347
2019	3,561	16,940	1,398
Share of UK total in 2019	**8.7%**	**5.8%**	**4.9%**

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	3,561	-1%	2
Nights (000s)	16,940	-8%	3
Spend (£m)	1,398	+4%	4

Between January and March 2020, the UK welcomed 743,000 visits from France (down 9% on the first quarter of 2019), worth £264 million (up 1% on the first quarter of 2019).* The COVID-19 pandemic already mildly impacted visitation from France to the UK in the first quarter of 2020 as both France and the UK introduced restrictions to counter the spread of COVID-19 in spring 2020.

Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing **small base

Key metrics by journey purpose

Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	4	£108	£467
Business	3	£142	£412
Visiting Friends/ Relatives	5	£50	£258
Study**	23	£47	£1,096
Misc.	11	£32	£348
All visits	5	£83	£393

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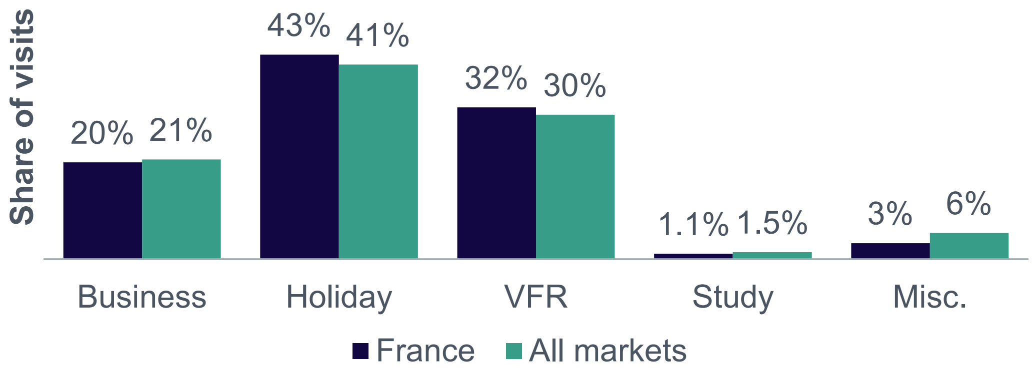
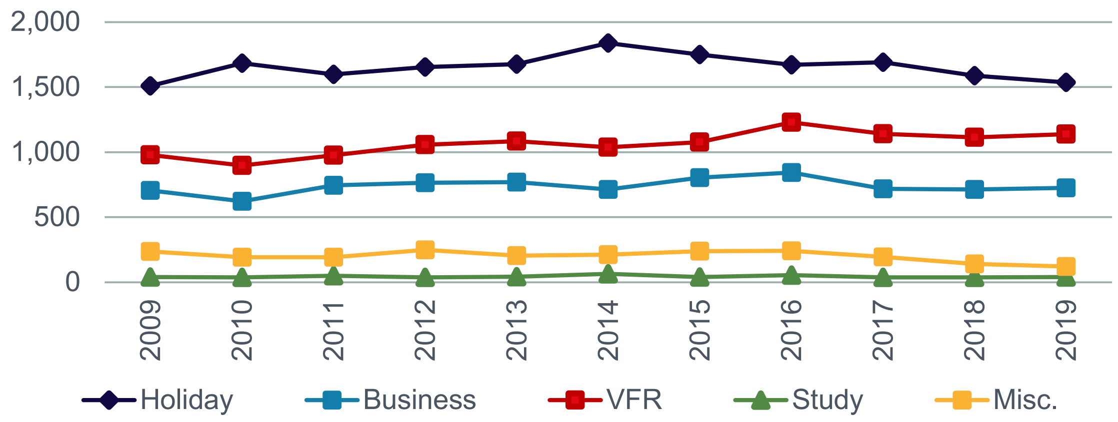
1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



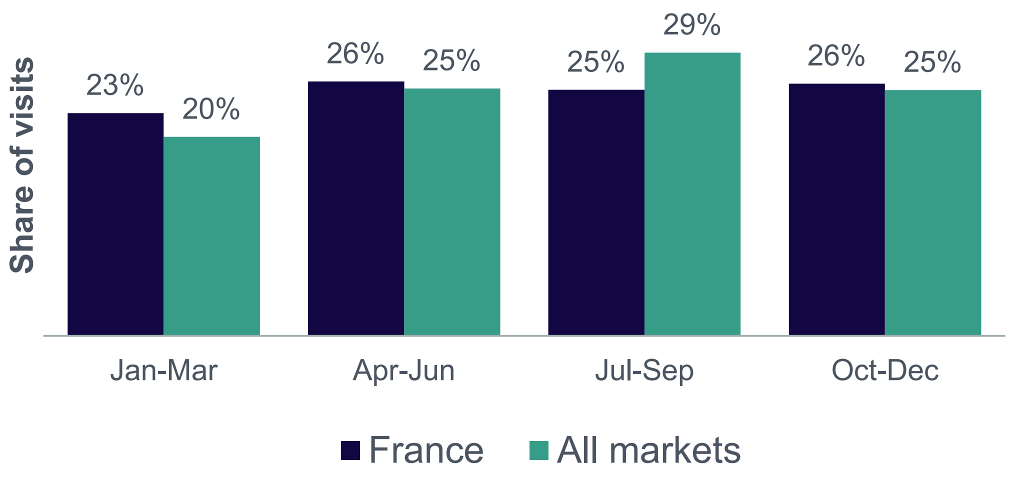
- The highest volume of French visits to the UK is generated by leisure visits in 2019: 1.5 million French visits to the UK were made for holidays in 2019, worth a total of £717 million in visitor spending (up 3% on 2018). The UK also welcomed 1.1 million French visits to friends/relatives residing here (up 2% year-on-year), worth a total of £294 million (up 2% on 2018).
- In 2019, 72% of spending came courtesy of holiday visitors and visits to friends and/or relatives; business visitors contributed 21%. On average, visitors residing in France spent £393 per visit in the UK; on holiday this rises to £467 per visit.

- French holiday visits set a volume record of almost 2 million in 2014, but have not managed to keep up with this peak in subsequent years. They closed overall 16% lower than in 2014 in 2019.
- 726,000 French visits to the UK were made for business purposes (up 2% on 2018) worth a total of £299 million (up 23% on 2018). The number of business trips from France to the UK was still more than 380,000 visits short of the peak of more than 1.1 million business visits last seen in 2002, ahead of the financial crisis which occurred in 2008/2009.

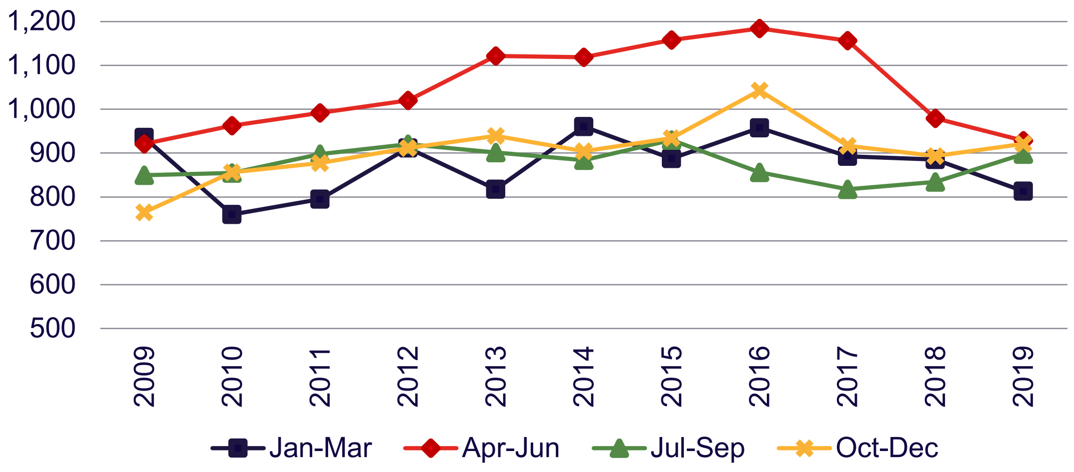
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

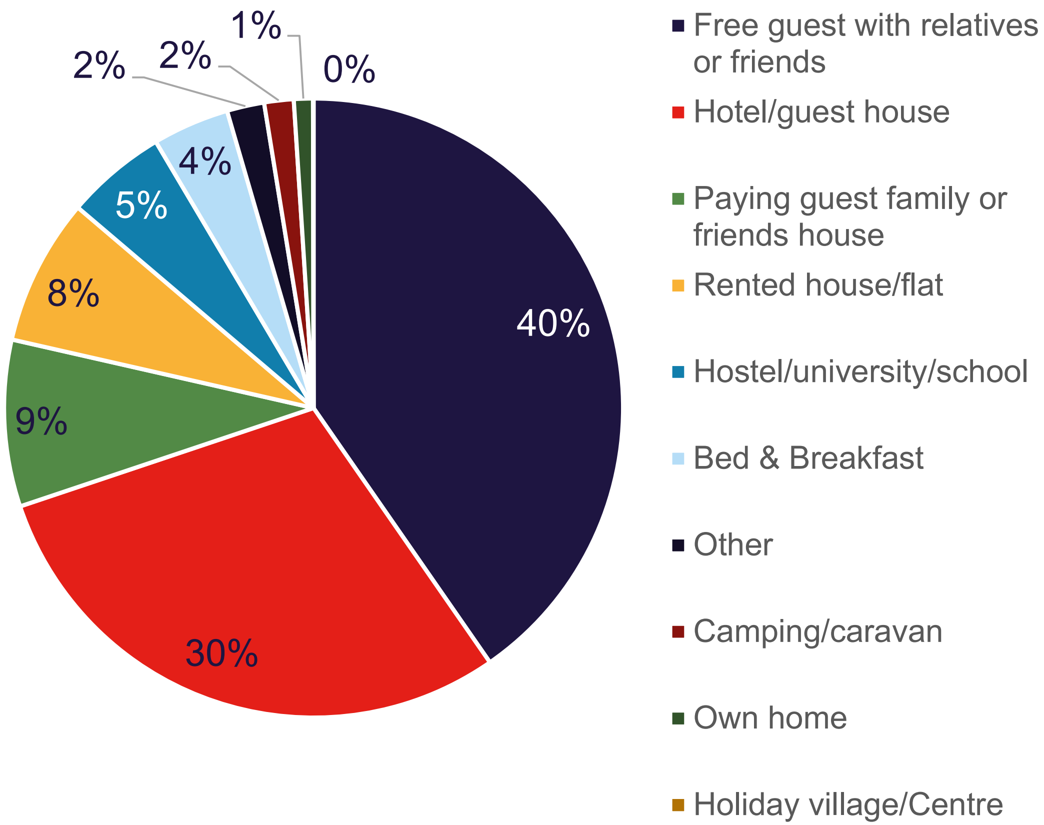


- Visits from France to the UK have excellent seasonal spread throughout the year. 26% of French visits in 2019 were made in the April-June period and the same proportion in the October-December period, closely followed by a quarter (25%) in the summer months from July-September, which is high season for many other markets. 23% of French visits came to the UK in the first three months of 2019.
- The last quarter of 2019 saw 921,000 French visits in the UK with record visitor spend of £420 million between October and December 2019. The summer quarter also showed growth, while the volume of visits made between January-March has declined in the most recent years and there is also a trend of volume decline in the spring period from April-June witnessed particularly in the last 3 years.

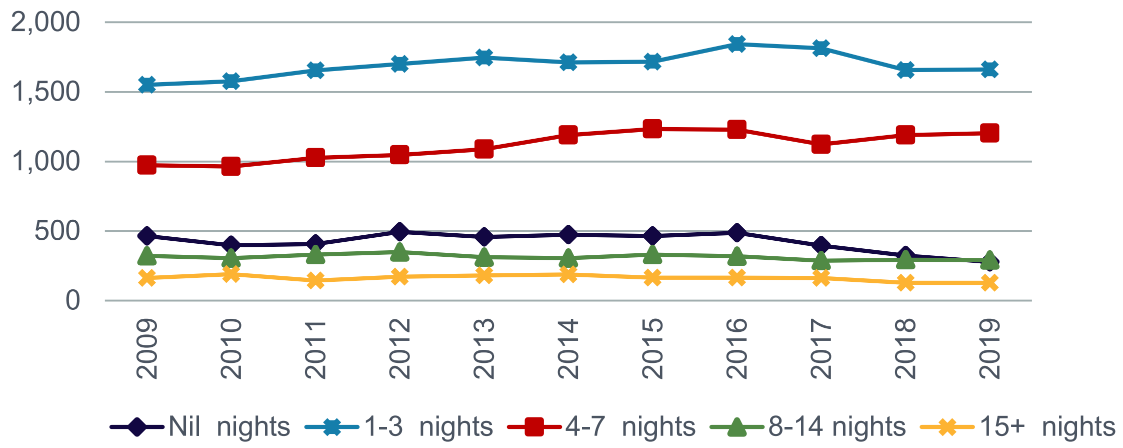
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

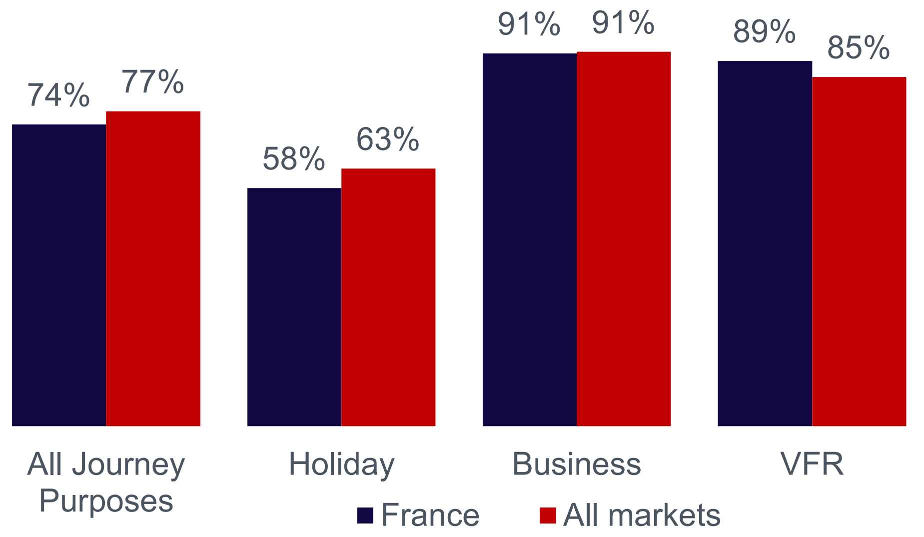


- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst French visitors. French visits to the UK staying 4-7 nights set a new visitor spending record in 2019 when they were worth a total of £551 million. Close to 280,000 French visits to the UK are just made for the day.
- Two forms of accommodation dominate the picture with 40% of nights spent staying for free with relatives or friends. 30% of nights are spent at a ‘hotel/guest house’. Almost one in ten staid with family and friends as paying guests or almost as many in rented houses/flats in 2019.

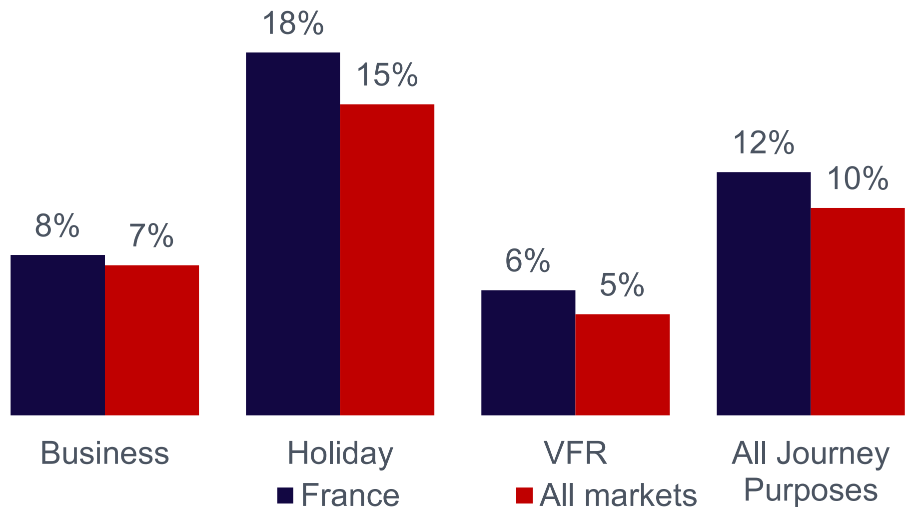
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 58% of holiday visits from France to the UK in 2015 were made by repeat visitors (excl. UK nationals). These repeat visitors came on average two or three times (a medium average visit frequency compared to other markets) and spent on average £1,651 in the UK in the past ten years.
- The highest proportion of repeat visitors were among those coming for business purposes (91%) or to visit friends and/or relatives who live in the UK (89%).
- More than one in ten visits from France are bought as a package or all-inclusive tour in 2019 with holiday visits most likely to have been bought in this format. While this is above the all-market average, most French visits to the UK remain independently organised.

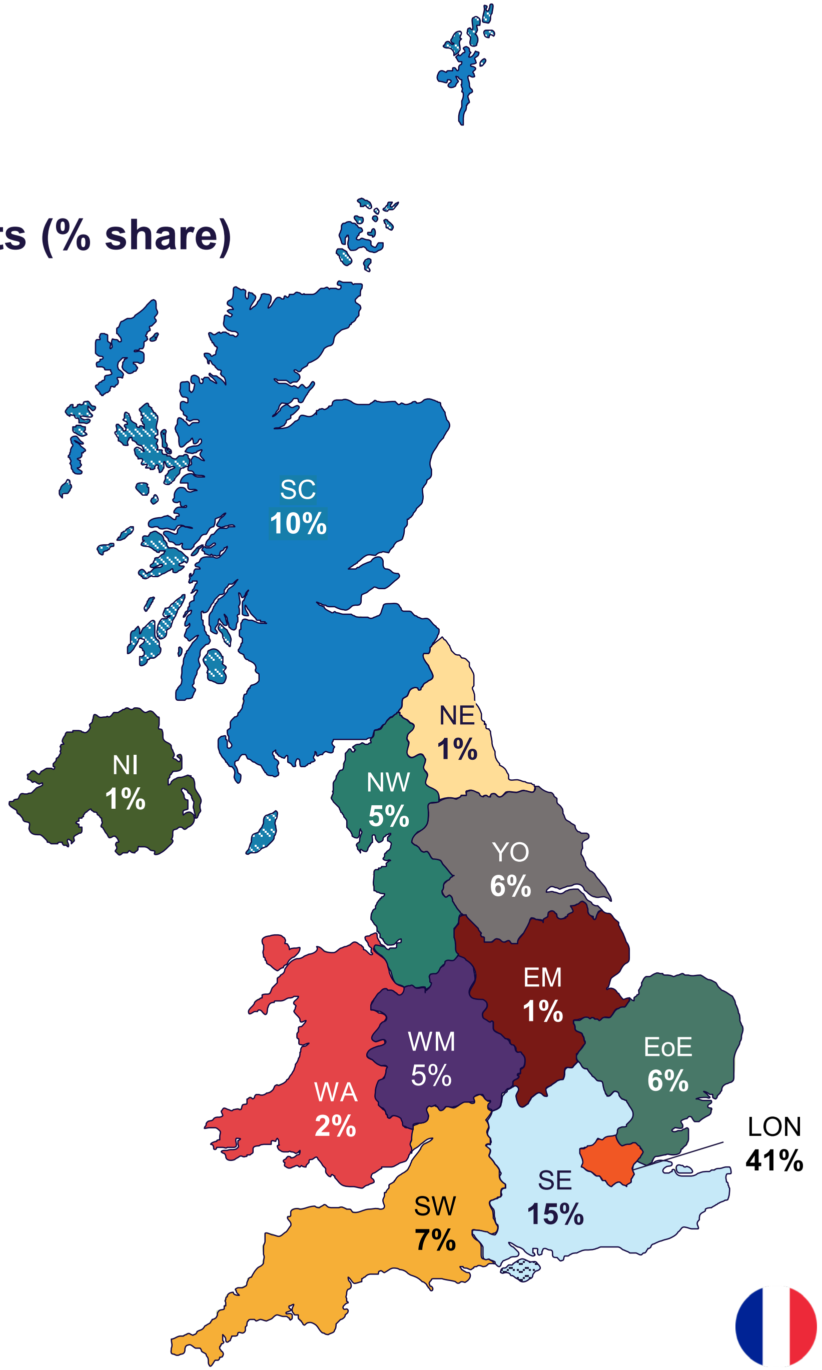
International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

1.2 Getting around Britain

Annual visits to the UK (2019)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	16,933	3,560	1,396
Scotland (SC)	1,723	222	135
Wales (WA)	388	76	21
Northern Ireland (NI)	144	19	13
London (LDN)	6,871	1,837	762
North East (NE)	182	30	16
North West (NW)	852	164	49
Yorkshire (YO)	1,058	79	23
West Midlands (WM)	840	146	48
East Midlands (EM)	221	61	20
East of England (EoE)	1,076	166	59
South West (SW)	1,113	216	70
South East (SE)	2,458	532	141
Nil nights (Nil)	N/A	279	40

Nights (% share)



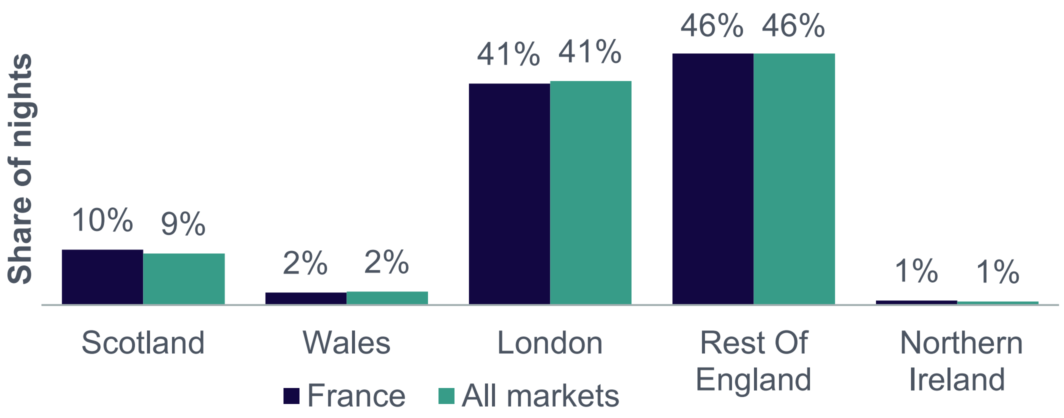
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	1,862
Edinburgh	169
Brighton/Hove	74
Bristol	69
Manchester	64

Regional spread 2019

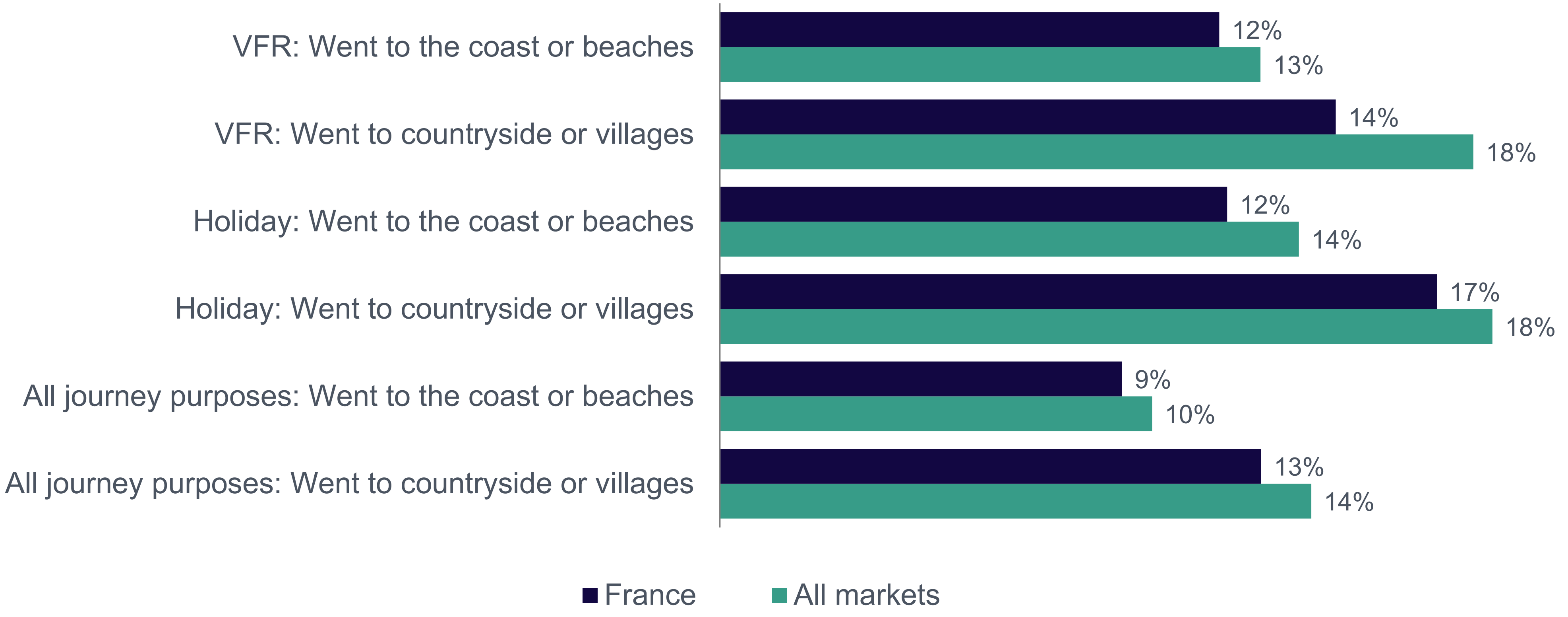


Source: International Passenger Survey by ONS

- London is the leading destination for a trip to the UK, accounting for just over two in five French visitor nights (in line with the all-market average), but the South East and Scotland are also popular based on the nights spent in the UK in 2019.
- In 2019, London welcomed 1.8 million visits from France (up 3% on 2018) worth a record £762 million (up 12%) in 2019. French visits to England outside of London grew by 5% to 1.3m with visitor spending amounting to £425 million (up 3%) last year. In 2019, Scotland saw 222,000 of French visits (down 27% compared to 2018 record) with total visitor spend of £135 million (down 32% on 2018 record). French visits to Wales grew by 13% year-on-year to 76,000 visits in 2019; these French visitors spent a total of £21 million (up 5%).
- French visits have a slightly below average propensity to feature rural and coastal areas of Britain. Holiday visits are most likely to feature activity in such areas.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

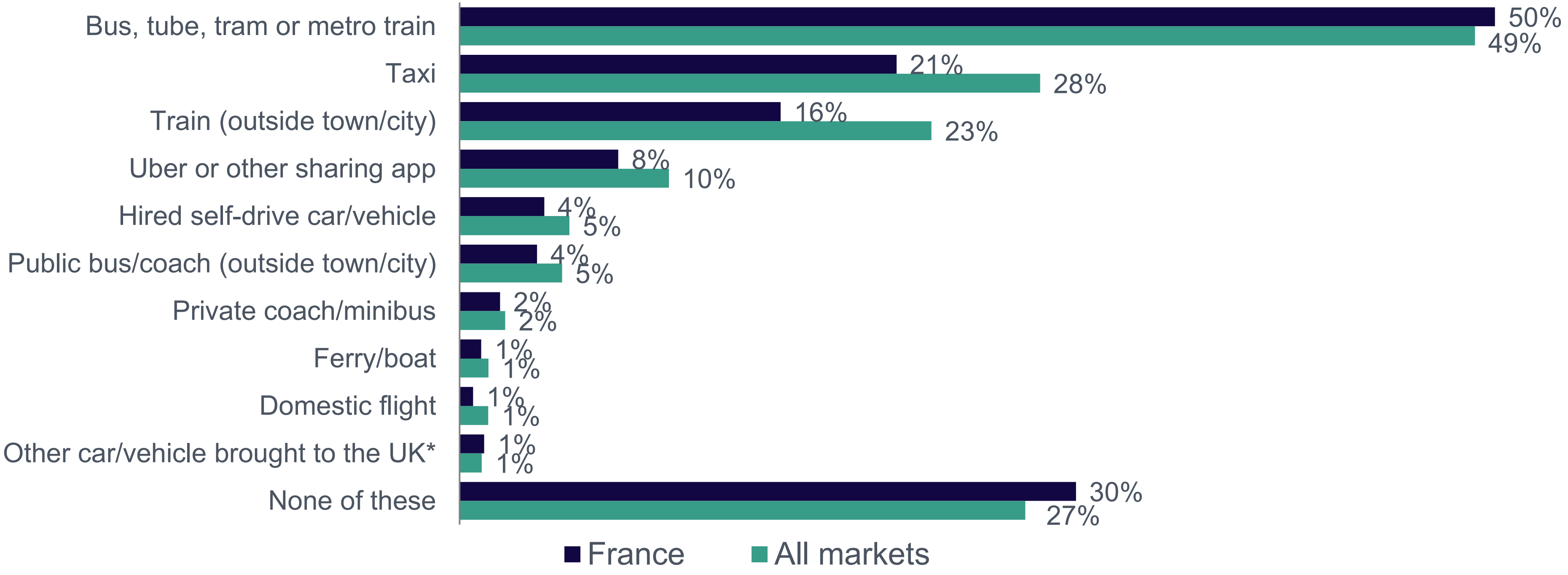


- More than one in ten French visits are likely to go to the countryside or villages as part of their visit and almost one in ten to the coast or beaches. The propensity is higher among those visiting on a holiday or when they come to see their friends or relatives in the UK.

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

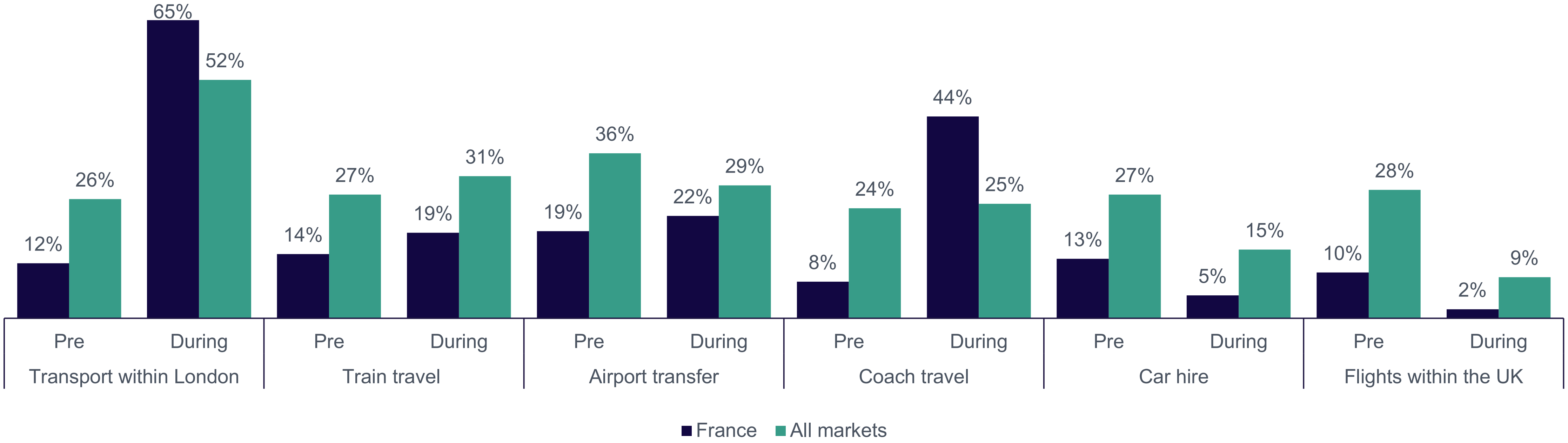


- Half of the French have a propensity to use bus, tube, tram or metro trains during their visit in the UK.
- They have a below average propensity to take any of the other internal modes of transport listed, but still about one-in-five say they would use a taxi and 16% a train (outside town/city).

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for ‘car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- About half of French visits involve the use of public transport in towns/cities. Outside of towns/city areas they are often less likely than the all market average to use the other transport options surveyed.
- The majority of French respondents buy their tickets for transport in Britain whilst they are here (with the exception of internal flights), especially Tube and coach travel tickets. Airport transfers are the method of transport which is most likely to be pre-booked with 19% of visitors reserving them in advance.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

1.3 Visitor demographics

Visitor characteristics

- The age cohort of 25-54 makes up the largest volume of visits from France to the UK. The number of visitors from more senior cohorts is growing: the age cohort of 55-64 set a new visit volume record in 2019. The volume of visits made by those aged 65 and above has seen the largest growth in the 10-year period to 2019, followed by the cohort of those aged 25-34.
  The highest spend per visit was registered for the age cohorts of 35-44 and 25-34 with average spend per visit of £418 and £409 respectively.
- There is a tendency of more men visiting the UK than women, especially among business visitors.
- 30% of visits made to see friends and relatives (VFR) residing in the UK are British nationals.
- Close to two-in-five visits from France are by travellers on their own, 30% visited with their spouse or partner. 9% of French visits were made as part of a tour group, often by young travellers e.g. on school or university trips, well above the all market average.
- The largest proportion of French visitors who came to the UK reside in the Île-de-France area, Hauts-de-France or the southern regions of Auvergne-Rhône-Alpes and Occitanie.

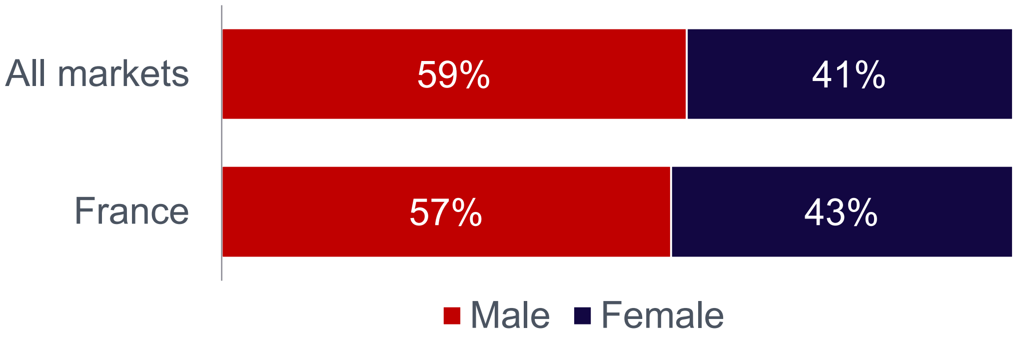
58%

of French holiday visitors have been to the UK before*

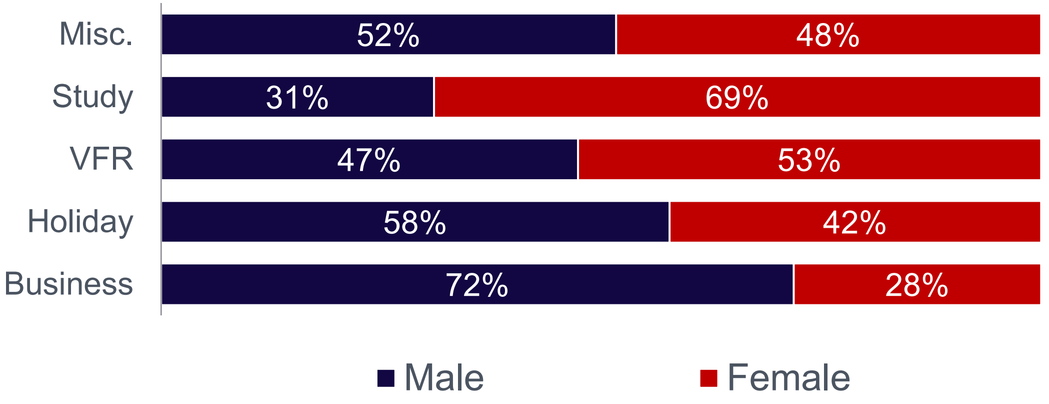
Source: International Passenger Survey by ONS, *IPS 2015

1.3 Visitor demographics: gender and age groups

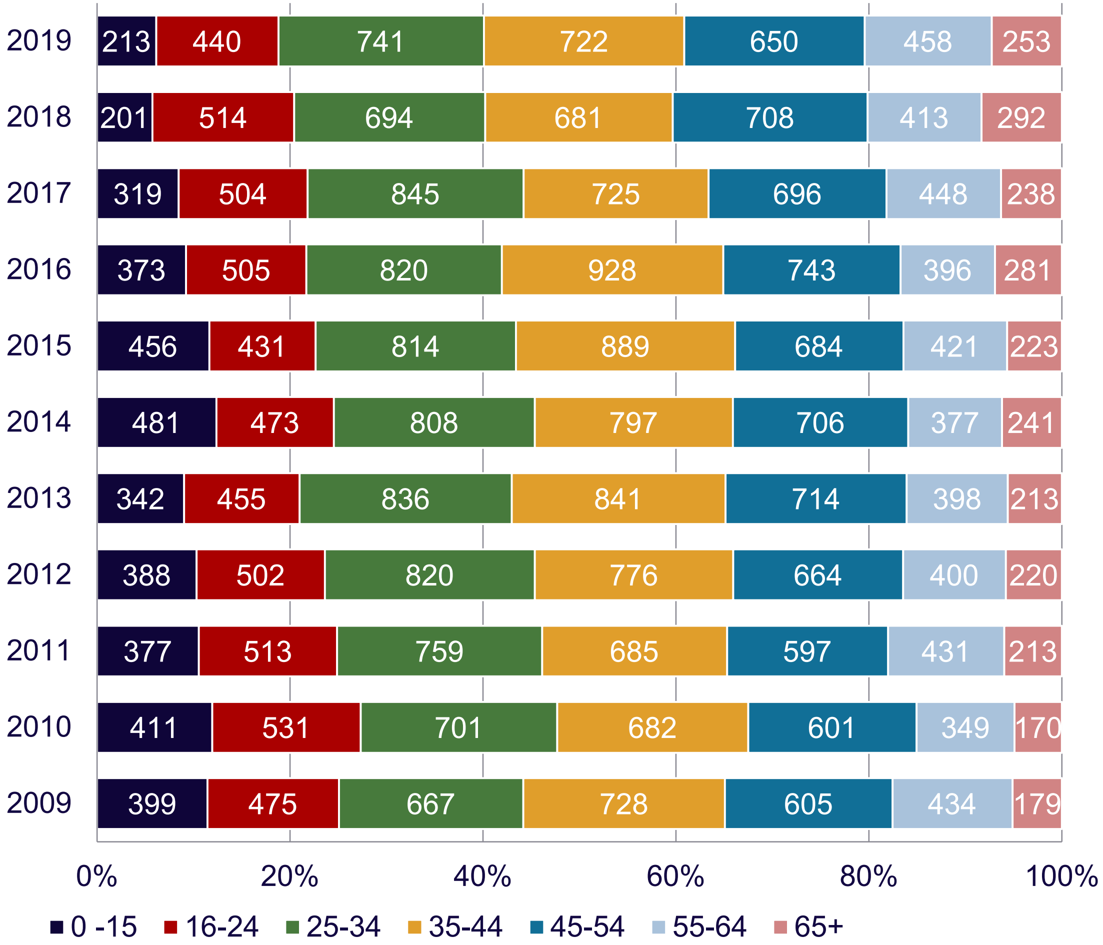
Gender ratio of visits (2019):



Gender ratio of visits from France by journey purpose (2019):



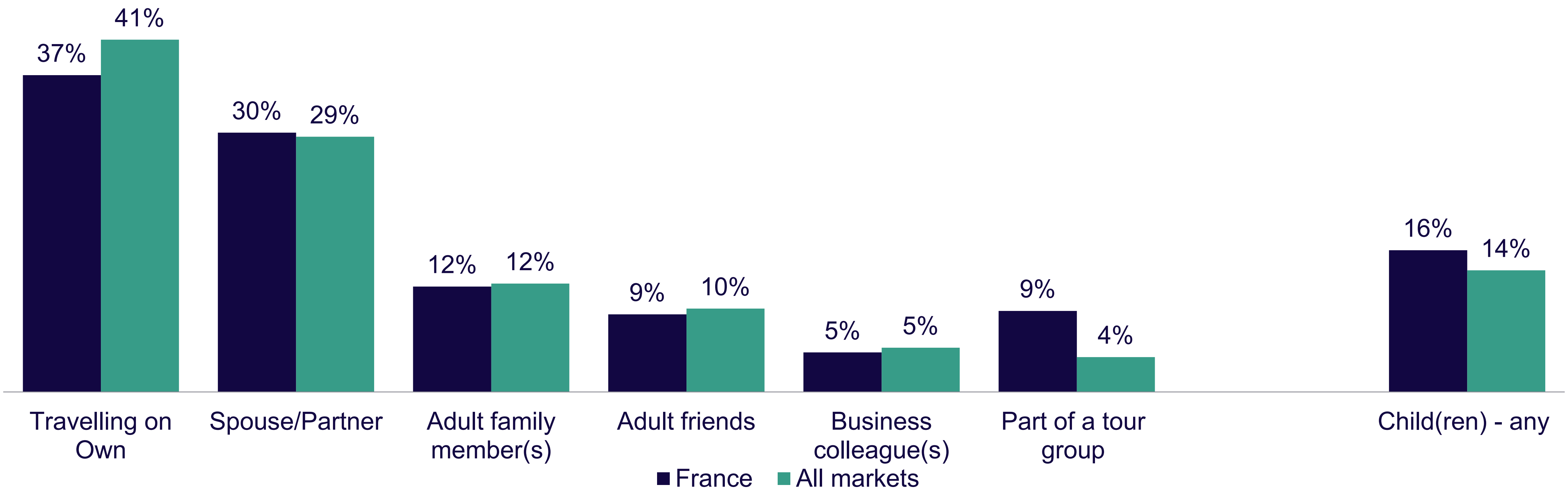
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have French visitors to the UK travelled with?



- Close to two in five visits from France are by travellers on their own, 30% visited with their spouse or partners.
- The French are broadly aligned with other markets on the proportion of other travel companions like other members of the family, friends or colleagues, but stand out with an above-average share of those who participate in a tour group: 9% of French visits were made as part of a tour group, often by young travellers e.g. on school or university trips.

Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

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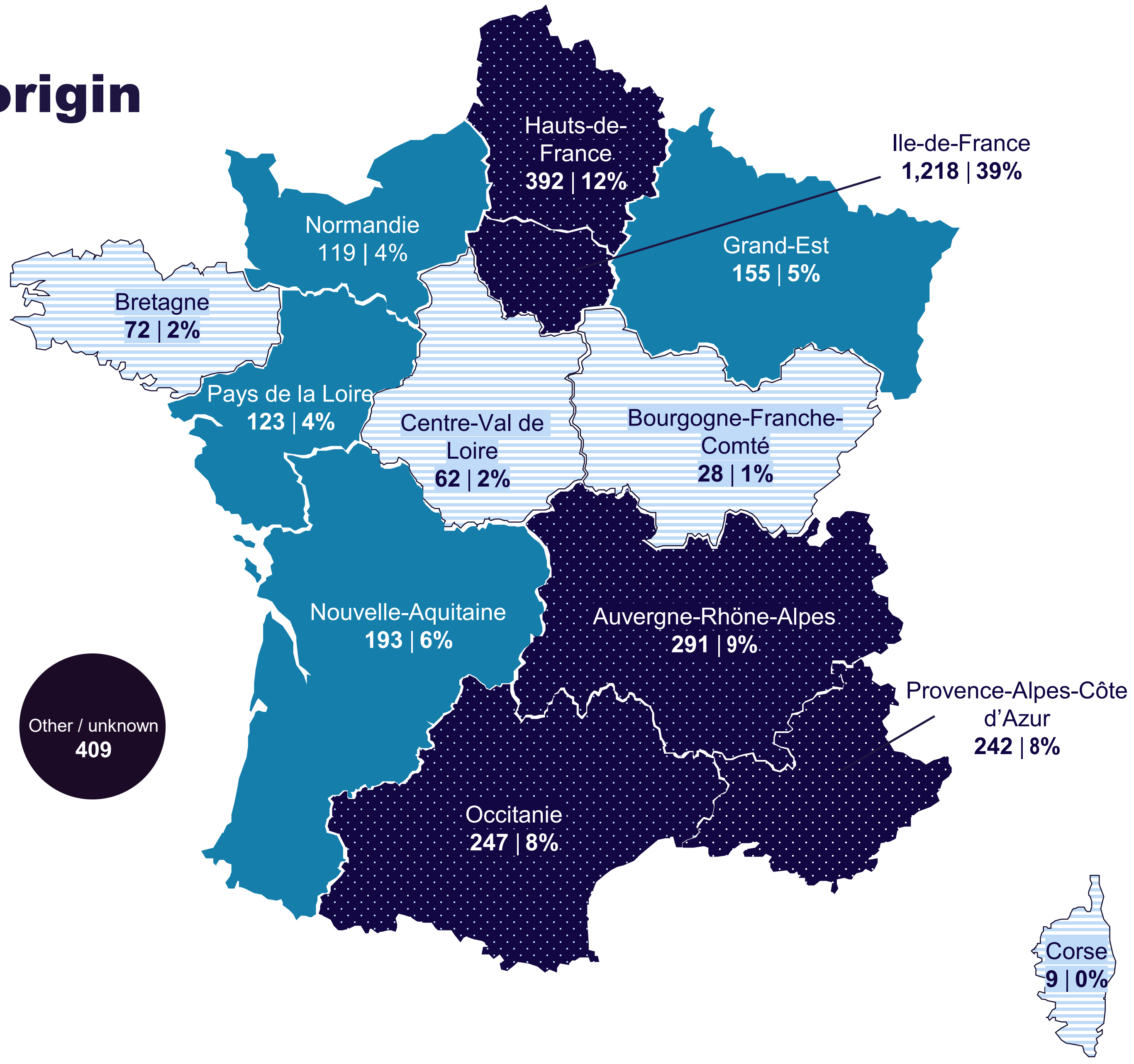
1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of French visitors who came to the UK reside in the Île-de-France area, Hauts-de-France or the southern regions of Auvergne-Rhône-Alpes and Occitanie (2019).
- The largest urban area in terms of inhabitants in 2021 is by far the French capital Paris followed by Lyon, Marseille-Aix-en-Provence, Lille, Toulouse and Bordeaux (2021).



Source: International Passenger Survey by ONS 2019, CIA World Factbook 2021

1.4 The UK and its competitors (1)

Market size, share and growth potential

- In 2019, the UK was the 3rd most popular destination of French outbound overnight travel globally behind Spain and Italy, ahead of Morocco, Germany and the USA. The UK's position in the destination ranking has been stable for more than the past decade.
- In a highly competitive set of destinations within Europe, the UK is projected to struggle keeping its market share, as is Italy. Spain is forecast to be expanding its market share, along with smaller increases for Germany, the Netherlands, and Austria. Ireland's and Switzerland's market shares remain roughly stable.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the French market are forecast to grow by 13% comparing 2019 and 2030, and French visitor spending in the UK by 30% in the same timeframe, which would see the value of the French market exceed £1.8 billion from 2029.
- Of those who came to Britain for a holiday, 41% considered Ireland, 30% Spain and 23% Germany as an alternative holiday destination.
- Despite the pandemic, 60% of French people aged 15 or over went on a leisure trip in 2020. Domestic trips are currently in focus: Nine-in-ten of French people aged 15 or over stayed within Metropolitan France in 2020 (up 30%).

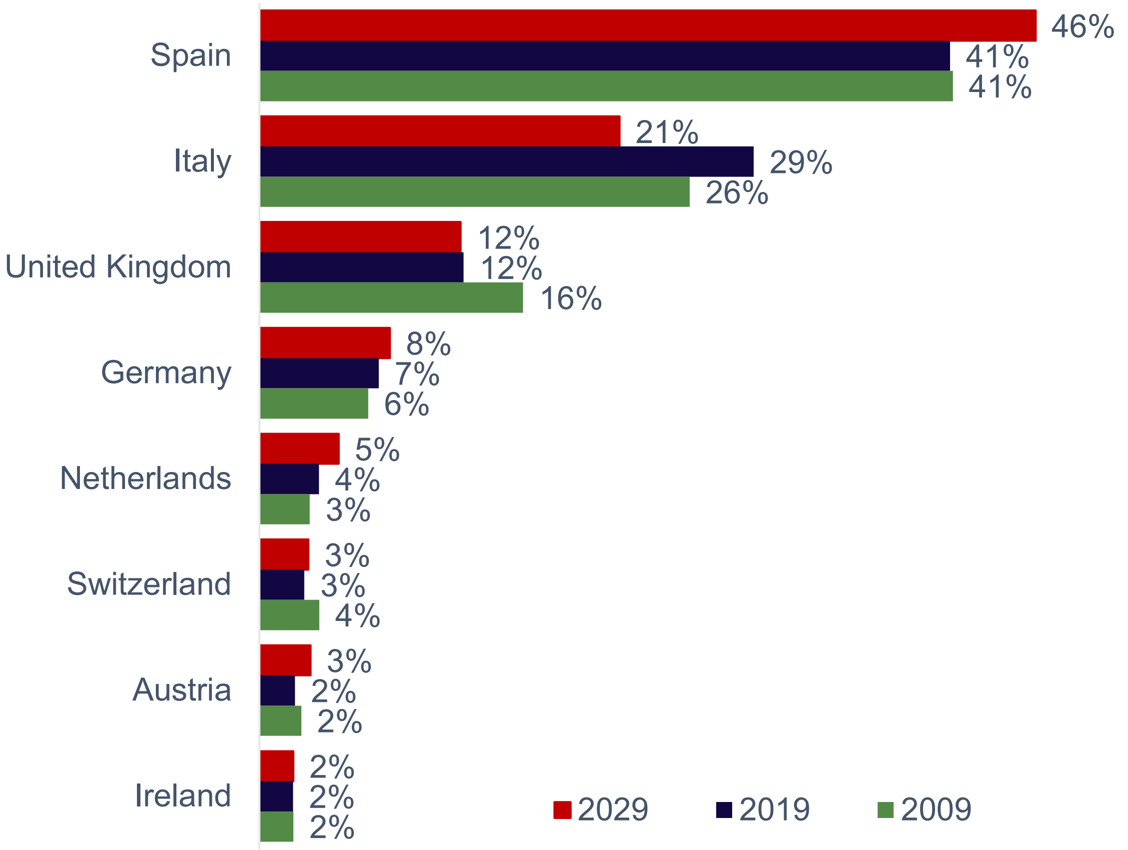
The UK ranks 3rd

for French outbound overnight visits

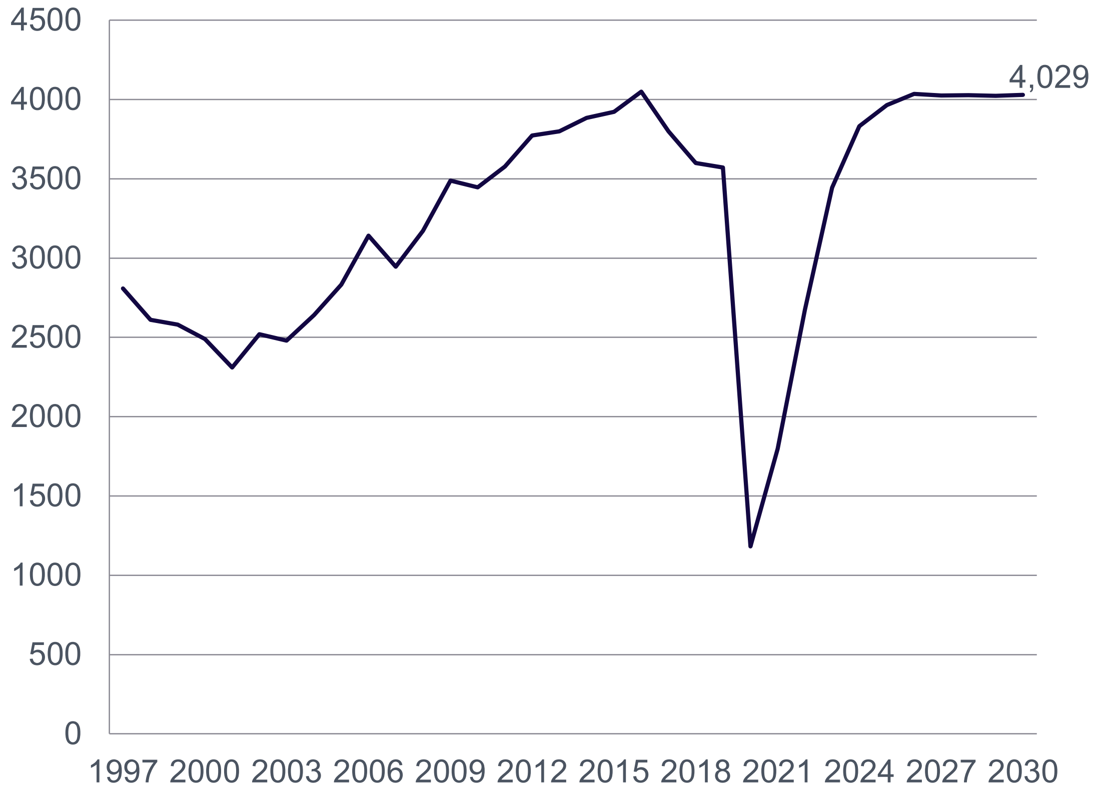
Source: Oxford Economics, VisitBritain/IPSOS 2016, Oxford Economics forecasts with VisitBritain adaptations
Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

1.4 The UK and its competitors (2)

The UK's market share of French visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Almost two thirds of French visits to the UK feature dining in restaurants; two in five enjoy going to a pub. Close to three in five French visits involve shopping.
- 72% of French holiday visits involve sightseeing and around half allow time for visiting museums or art galleries or time in parks and gardens and almost as many go to castles or historic houses. A third of French holidaymakers visit religious buildings.
- More than one in four French on holidays in the UK like to socialise with locals or go on a guided tour.
- Many French on holidays enjoy walking in the countryside or go to the coast while here.
- 10% enjoyed the performing arts, i.e. theatre, musical, opera or ballet on their holiday here.
- 93,000 French visits involved watching football live.
- 98% of French visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.

Top 10 activities for French visitors during their visit to the UK

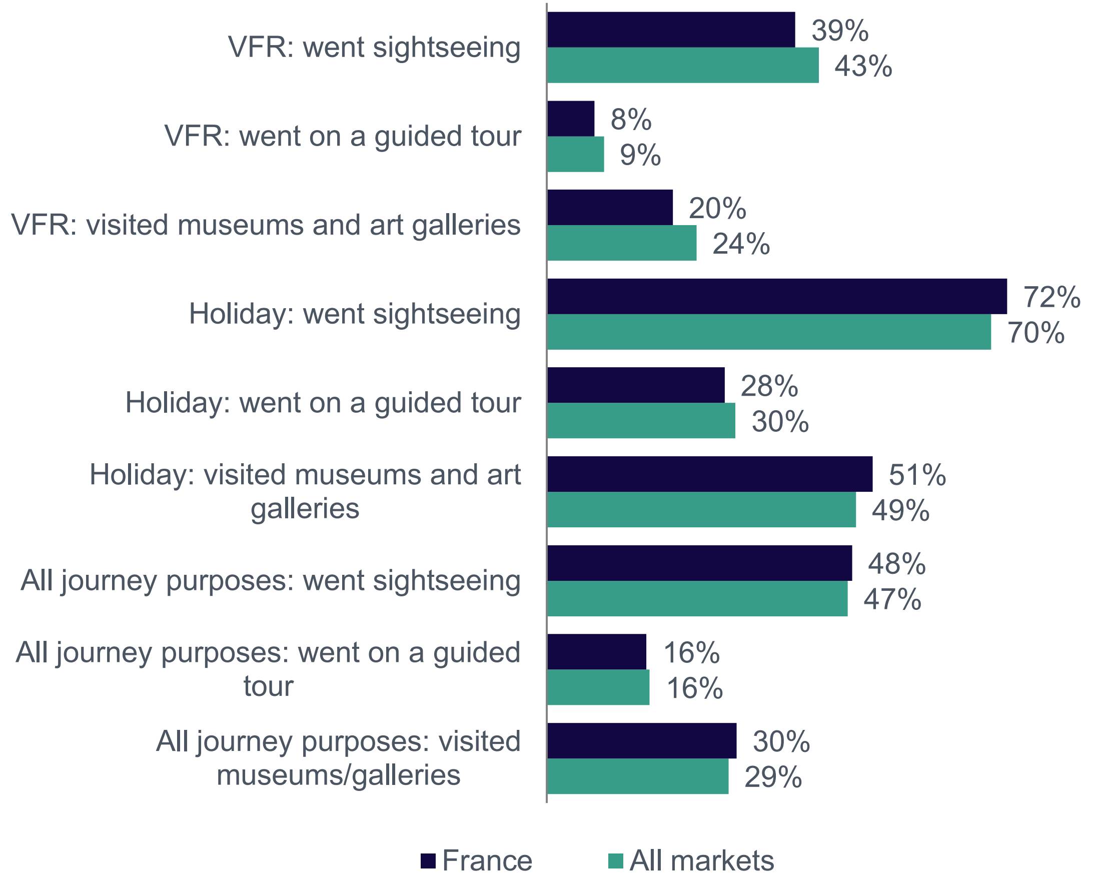
1. Dining in restaurants
2. Going shopping
3. Sightseeing famous monuments/ buildings
4. Going to the pub
5. Visiting parks or gardens
6. Visiting museums or art galleries
7. Socialising with locals
8. Visiting castles or historic houses
9. Walking in the countryside
10. Visiting religious buildings

For more information on activities, please visit our webpage of activities undertaken in Britain

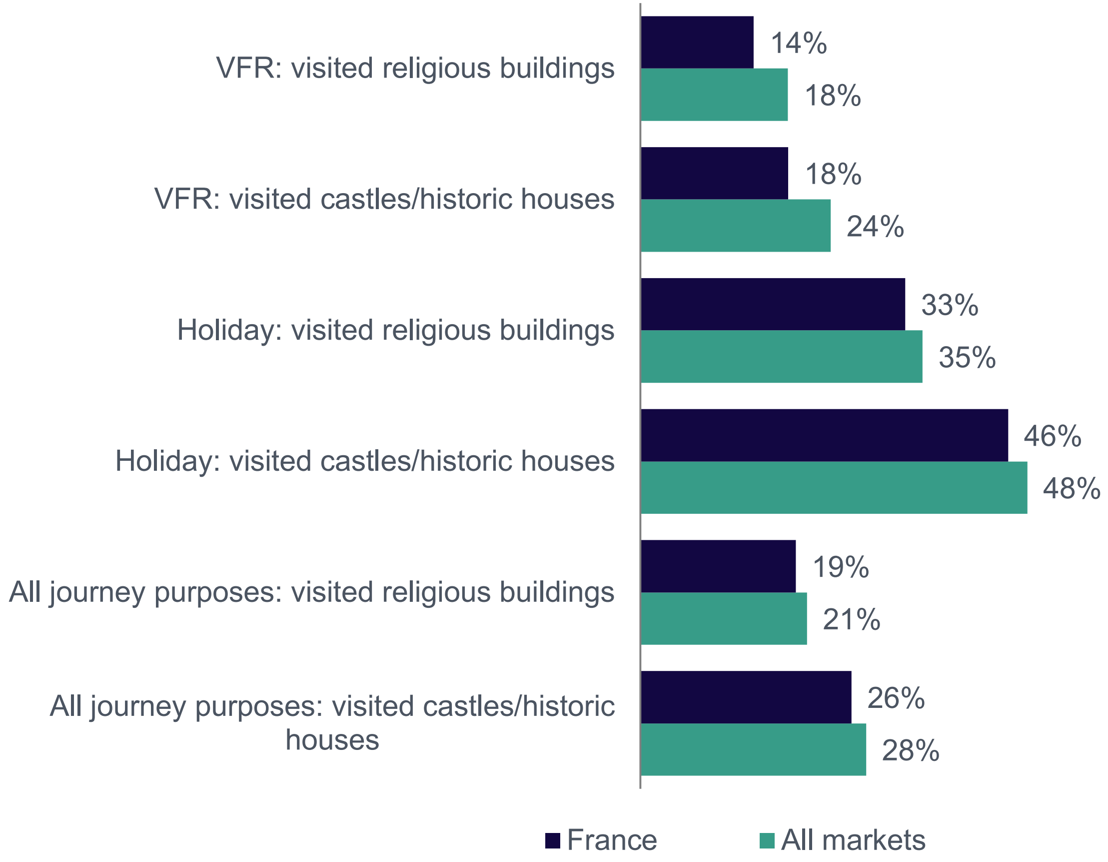
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour



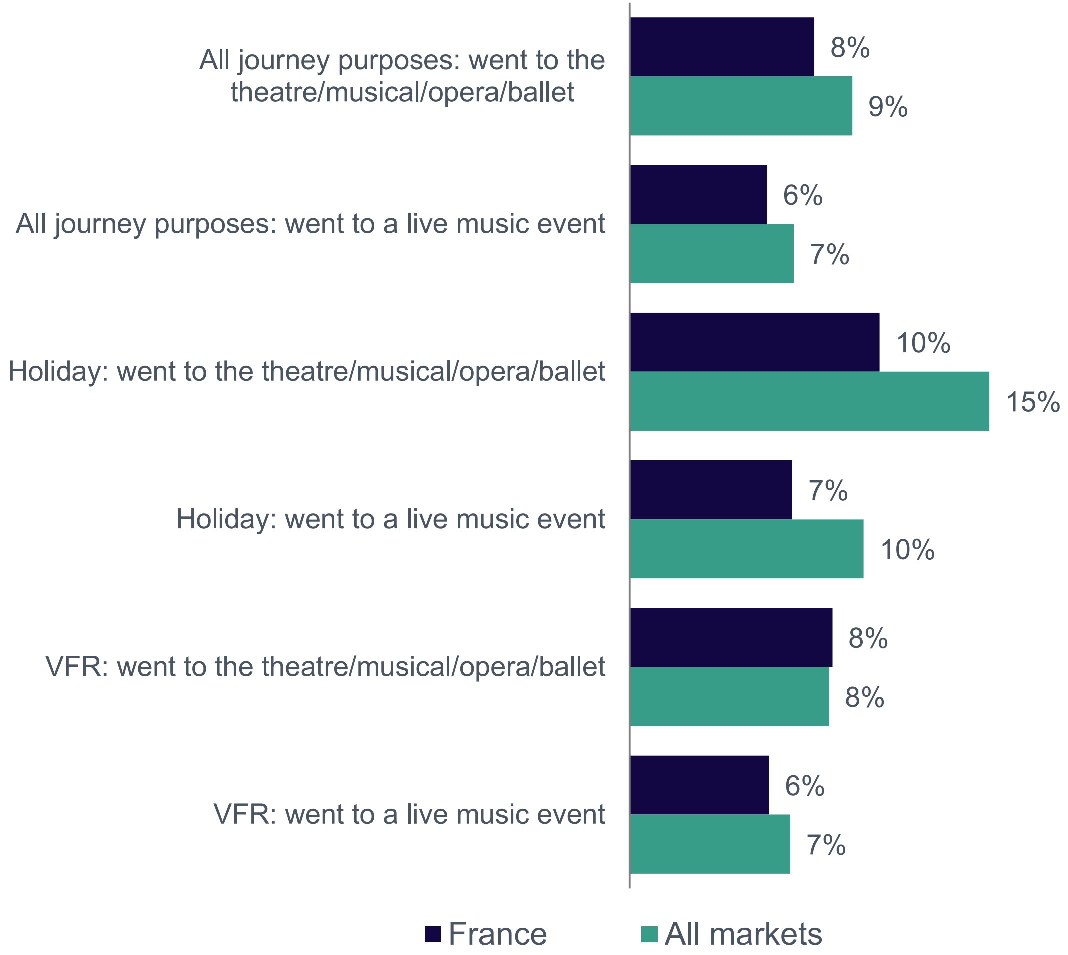
Propensity to visit built heritage sites



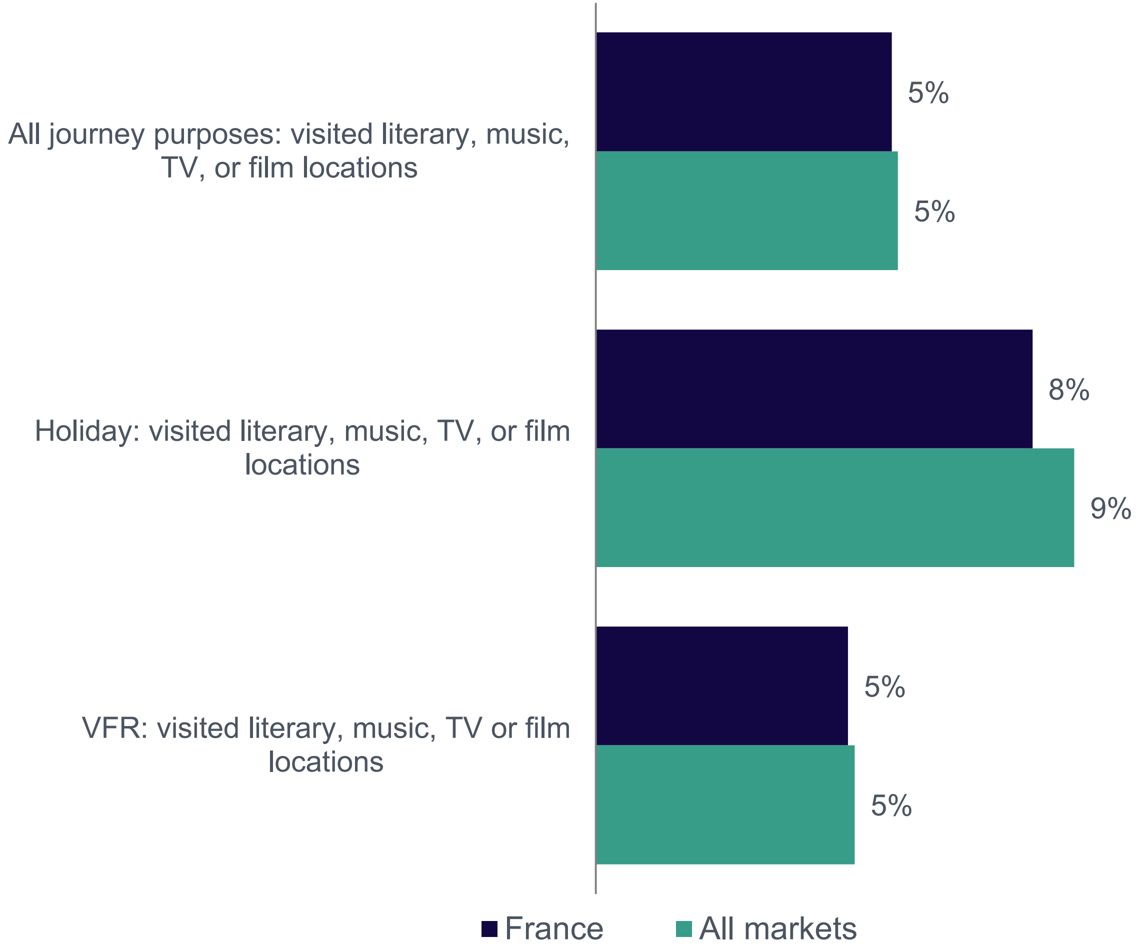
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



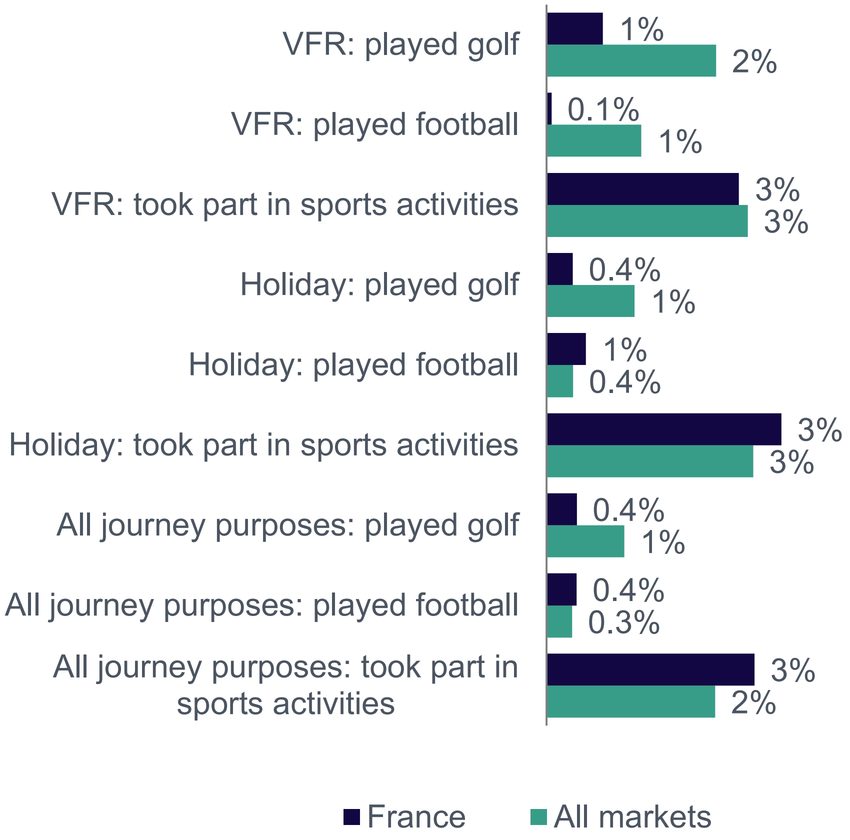
Propensity to visit literary, music, TV, or film locations



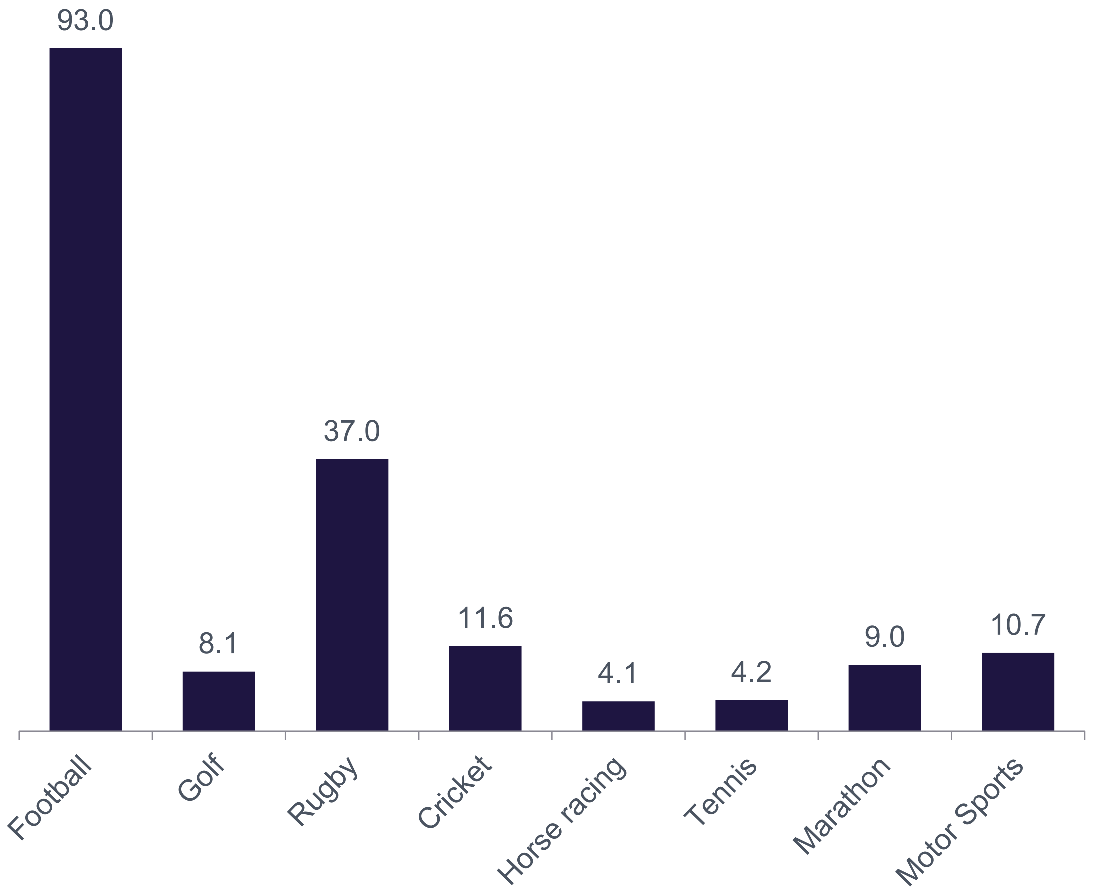
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



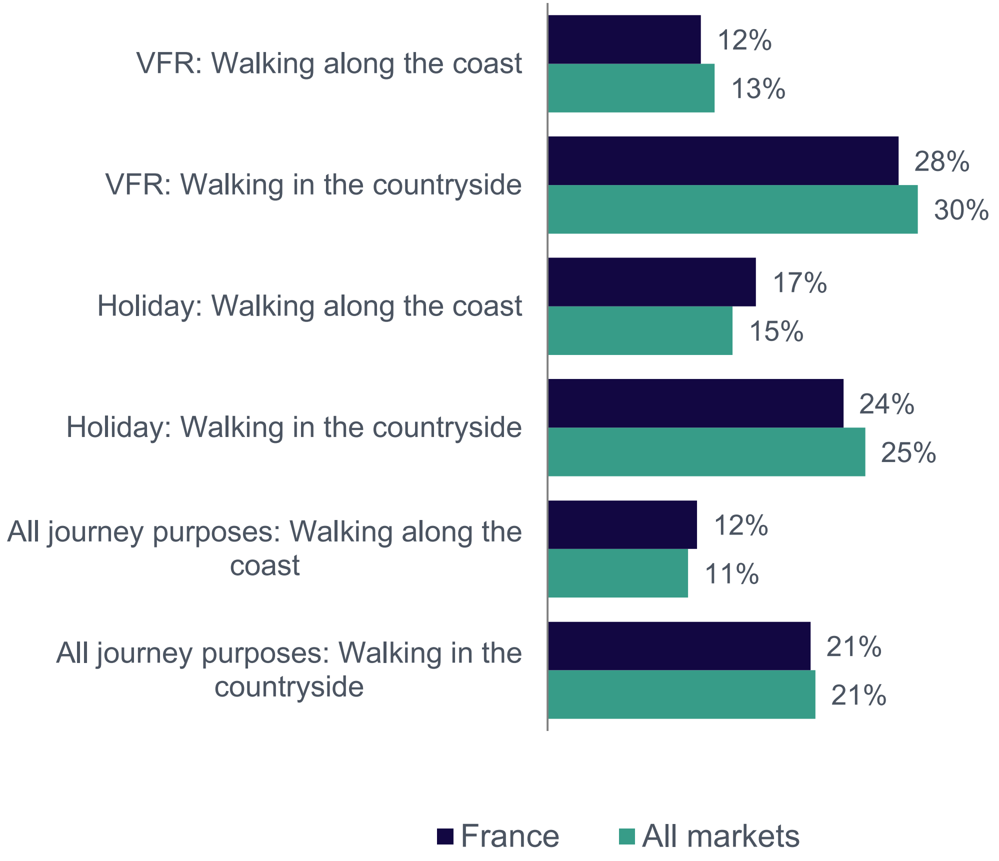
Number who watched sports live during trip (000s)



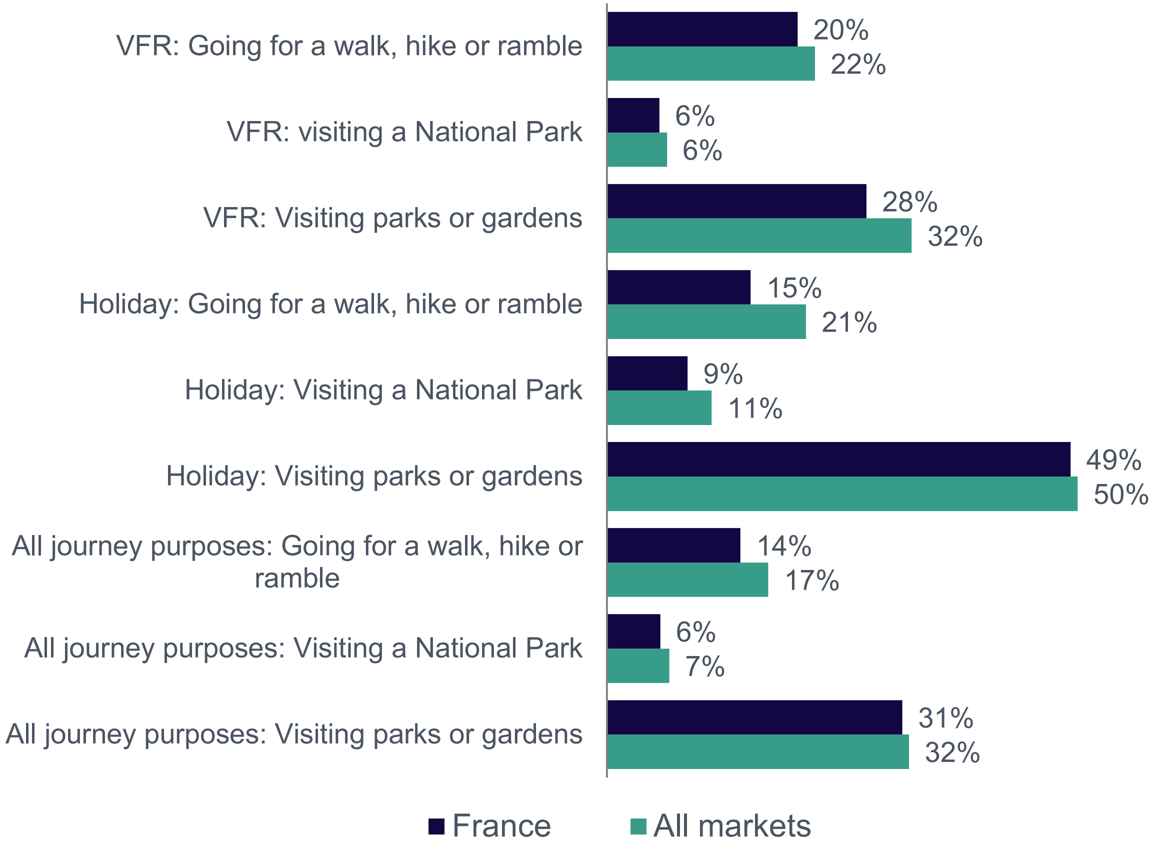
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



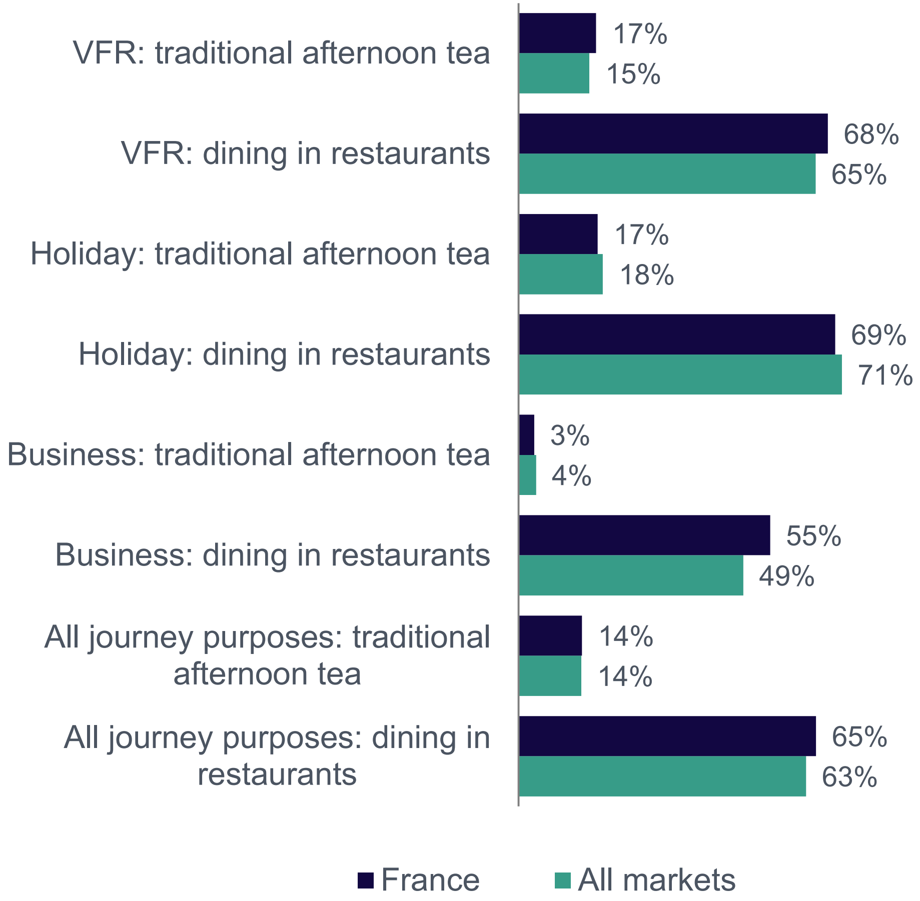
Propensity to enjoy the outdoors



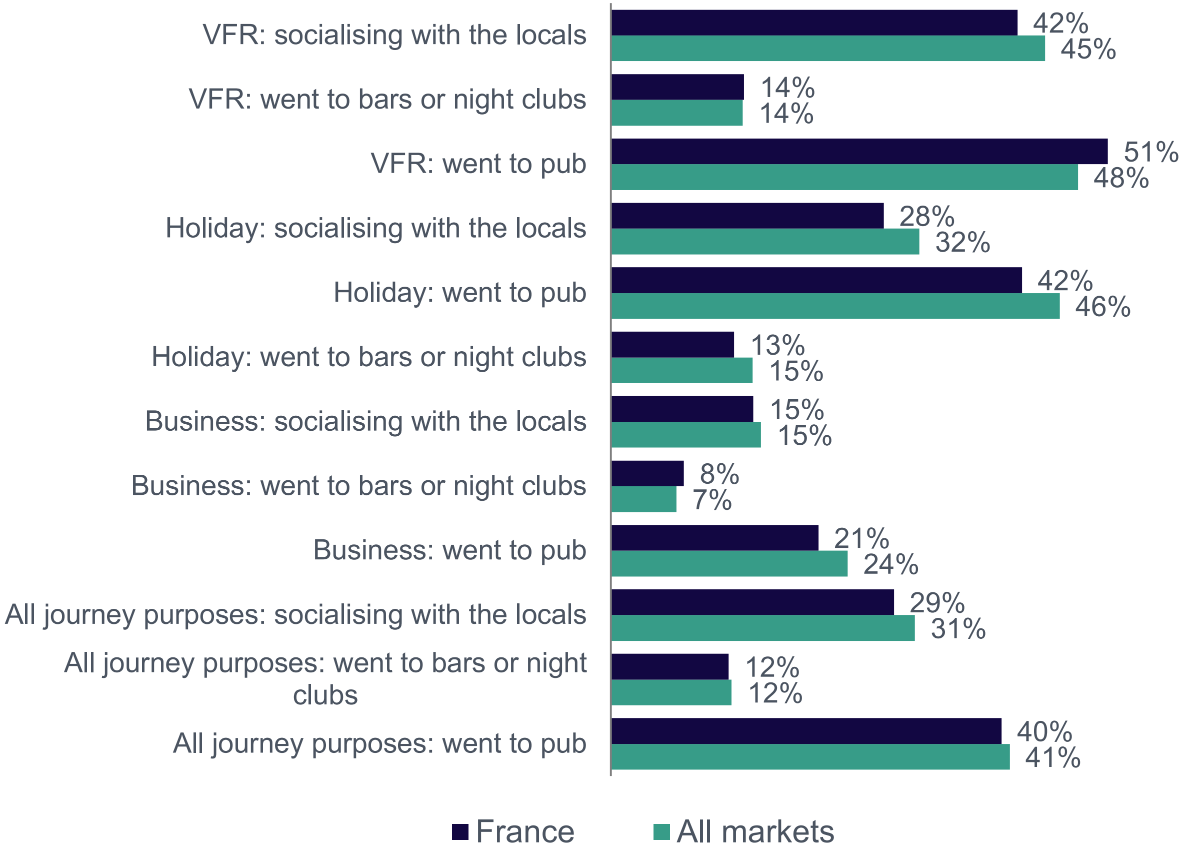
Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



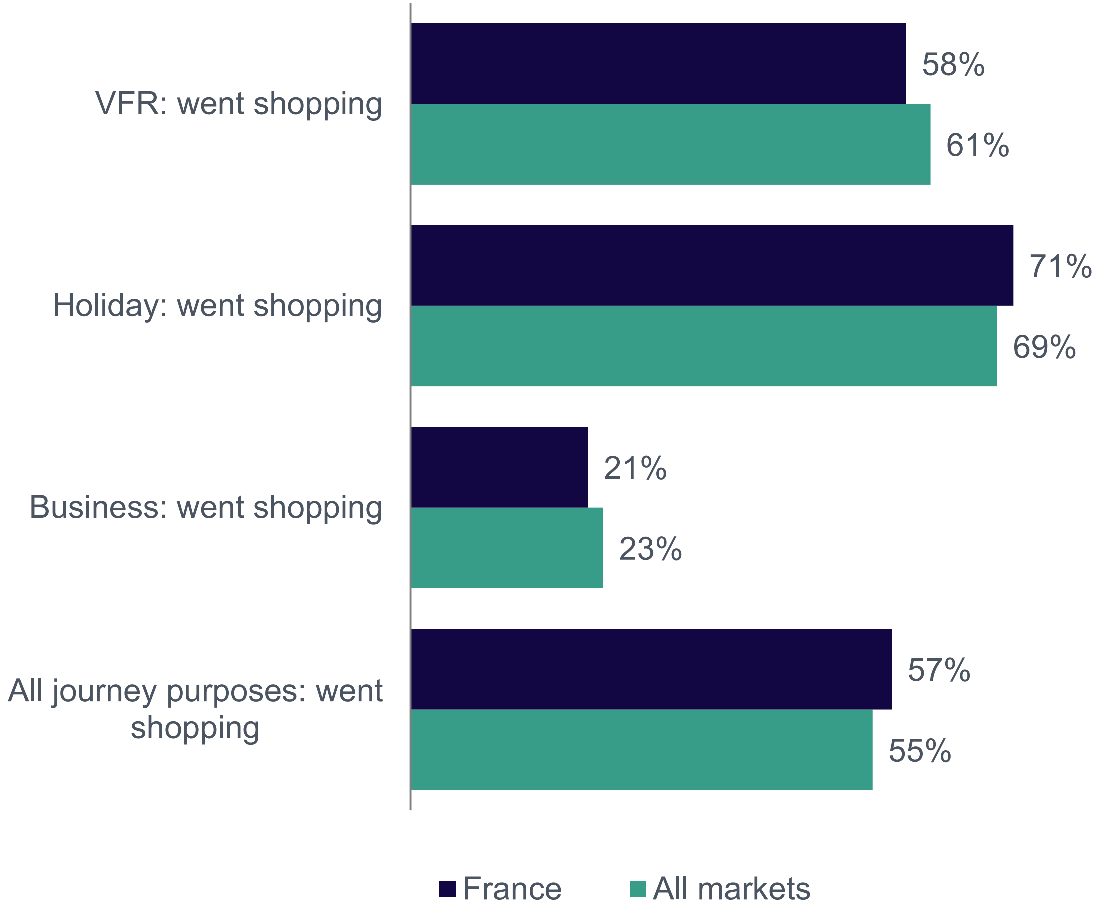
Propensity to go to the pub or bars and night clubs, or to socialise with locals



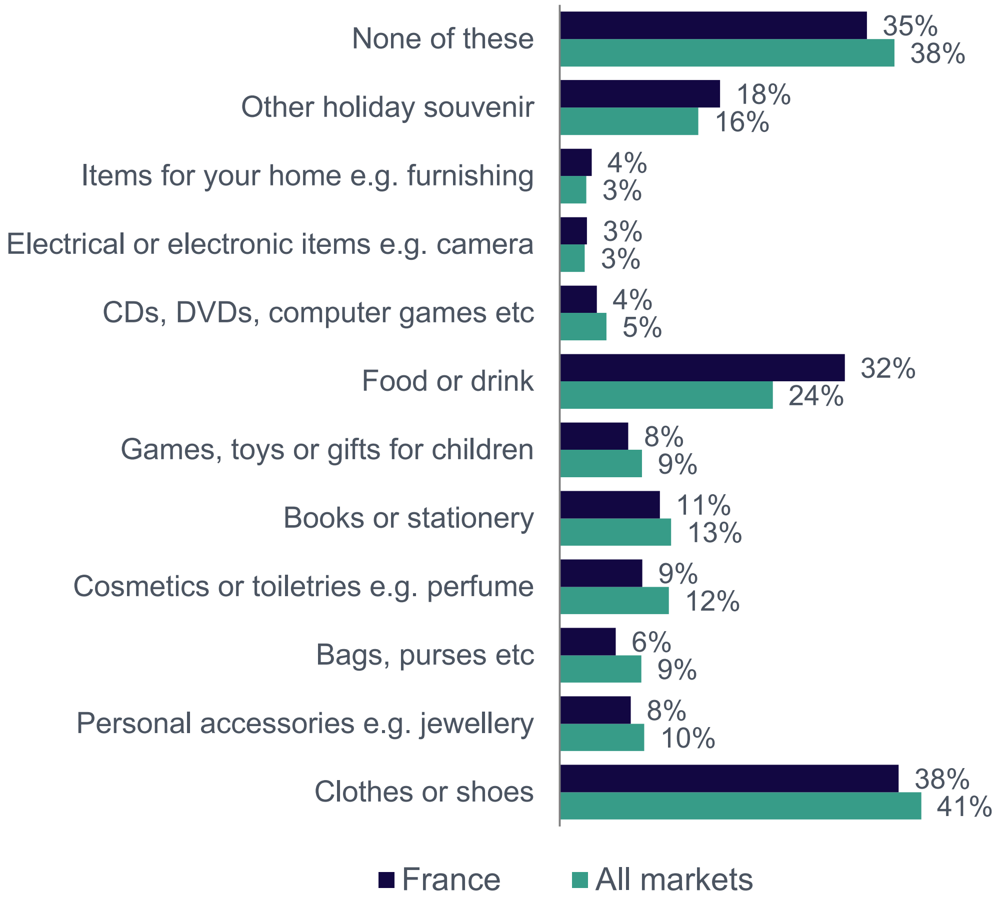
Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



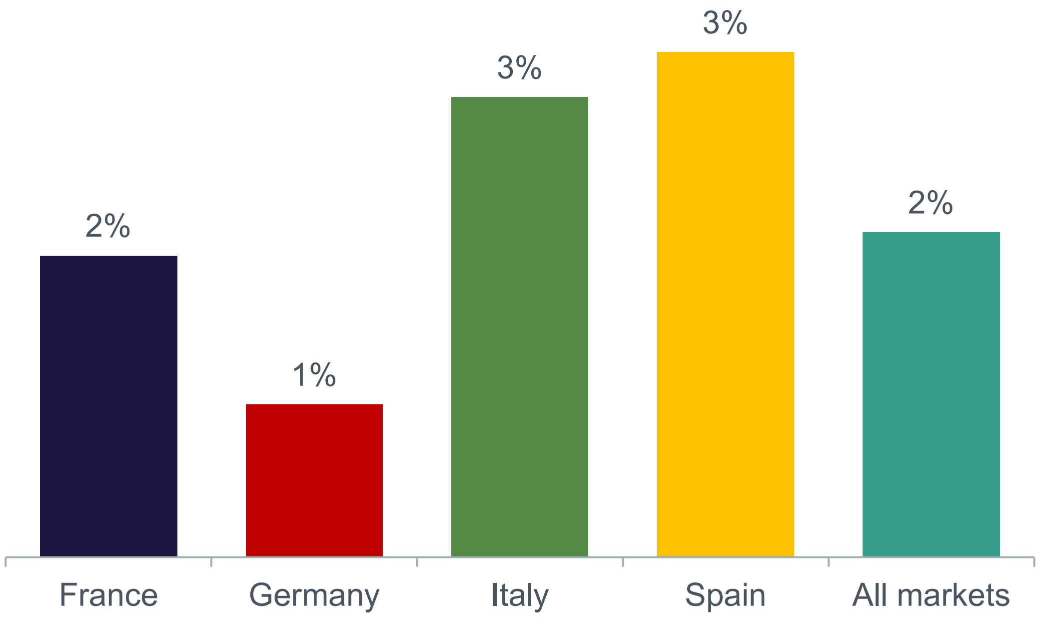
Propensity to purchase selected items



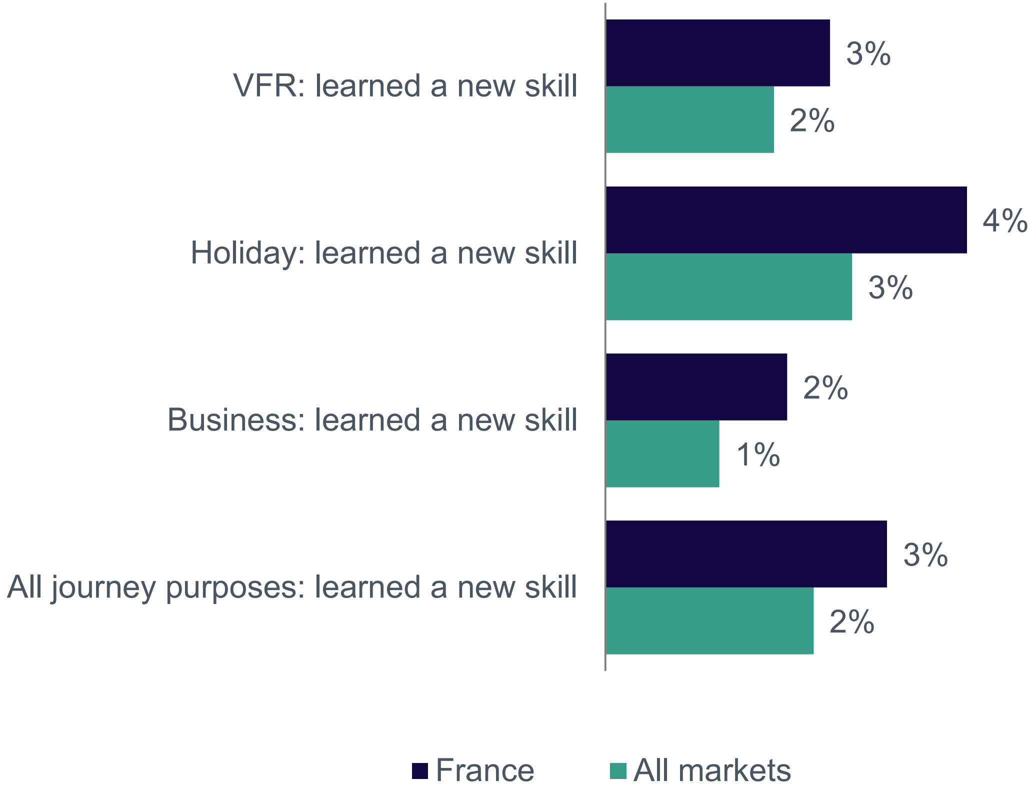
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Experiencing a visit to the UK

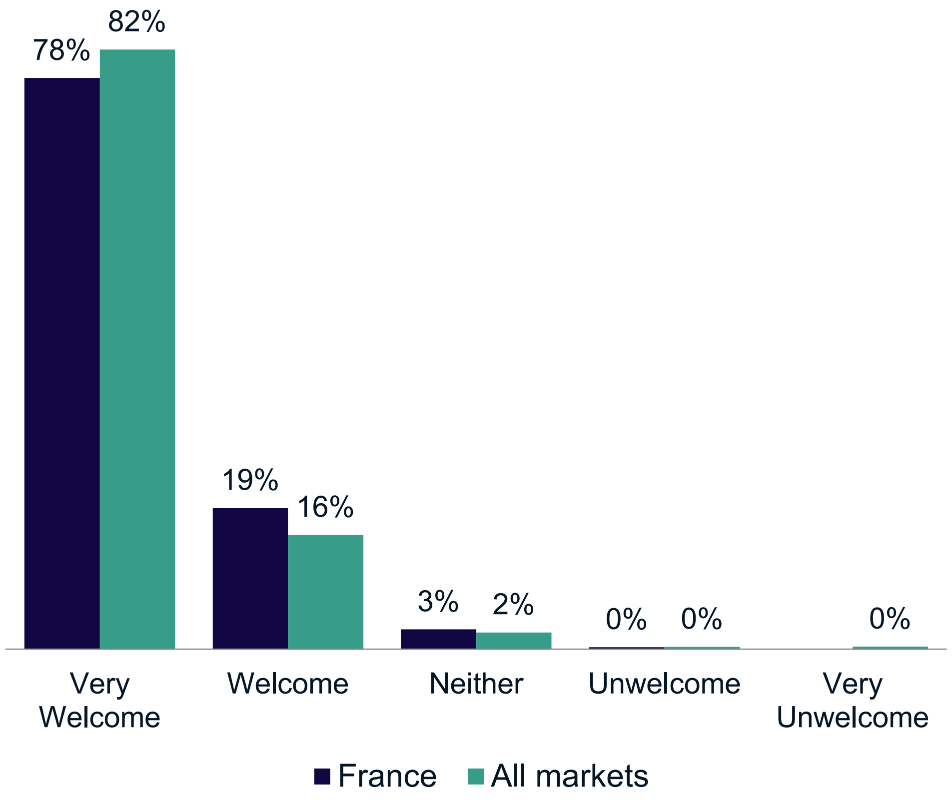
- Almost eight in ten visitors from France felt very welcome during their stay in the UK. A similar share of French visitors were very likely to recommend a stay in the UK for a holiday or a short break at the end of their visit.
- Propensity to feel welcome or to recommend the UK among French visitors is just slightly below the all-market average.
- Asked for reasons which would encourage the French to travel back to the UK for a holiday, half said that the UK is easy for them to get to. More than two-in-five would like to see sights or attractions they could not see on their last visit(s), closely followed by the appreciation of the ease to get around and the desire to visit a different part of the UK than on a previous visit. More than one in three of the French state the view that the UK caters well for tourists which is higher than the all-market average.
  Round about one in five of the French say they would like to return to experience a new activity that had not done on their previous visit(s), for the local food and drink, or that they are motivated by the positive interactions they had with locals last time – the French under-index on all of these three reasons compared to the all-market average.
  The French over-index with 16% stating that they would not like to return to the UK for a holiday compared to 5% in the global average.

98%
of French visitors would recommend a holiday or short break in the UK*

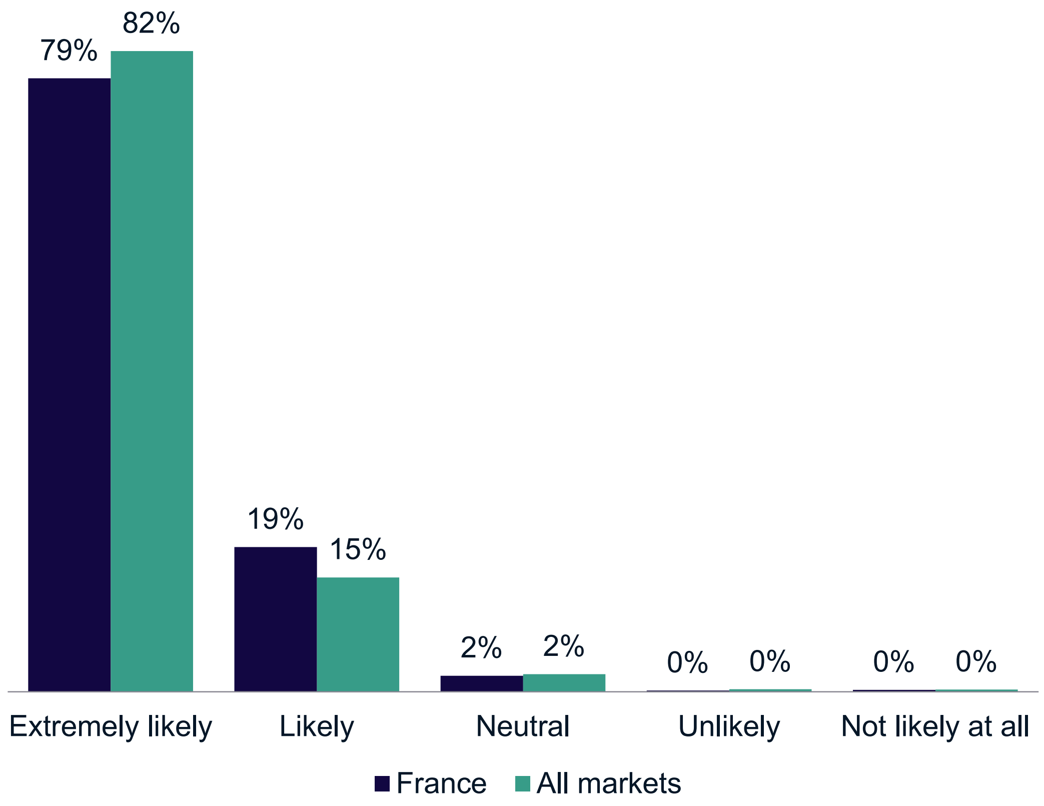
Source: IPS by the ONS (2017; *all visits, excluding UK nationals), Ipsos-Anholt Nation Brands Index 2019 (previous visits refer to previous holiday visit(s) made to the UK)

2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



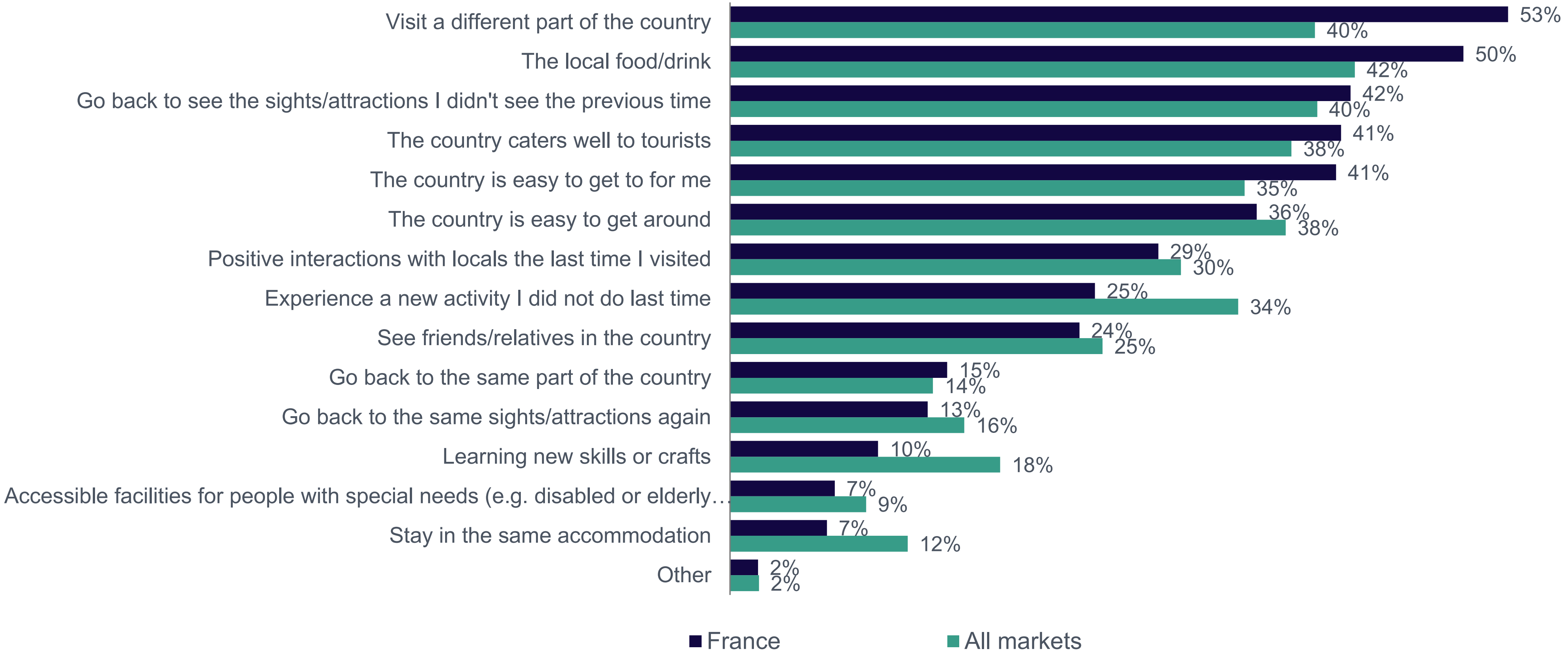
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excl. UK nationals and nil nights)

2.2 Reasons to return to a holiday destination

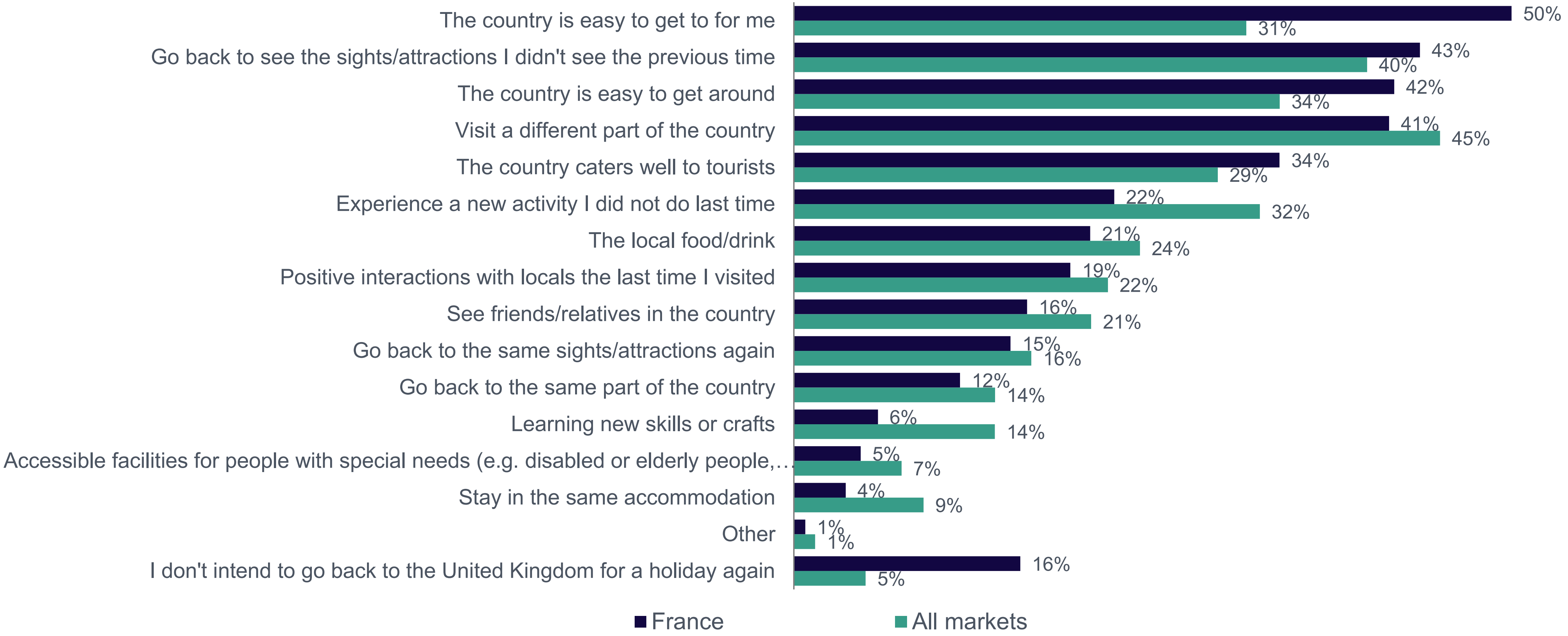
Reasons to return to a destination in general



Source: Anholt-Ipsos Nation Brands Index 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt-Ipsos Nation Brands Index 2019

2.3 Perceptions of the UK (1)

- The French rate the UK highly for contemporary culture and culture overall, vibrant cities, sports, and cultural and built heritage, but less so for its natural beauty and welcome; the UK is rated 31st and 18th out of fifty nations on these two attributes respectively.
- Museums are the cultural products or services the French most strongly associated with the UK, followed by music, films and sport.
- A trip to the UK would be expected to be 'Educational' (29%) as well as 'Exciting' (20%) and 'Fascinating' (17%) by the French.
- Australia, the USA and Italy are the destinations that the French consider the 'best place' for delivering what they most want from a holiday place.
- Areas of strength for the UK include: 'good shopping', 'watching sporting events', the 'ease of getting around on public transport' and 'visiting a place with a lot of history'; few consider Britain for 'food and drink'. The ease of access to Britain and its culture are the biggest draw for choosing Britain for a holiday.
- Activities that appeal to potential visitors from France include riding the scenic 'Hogwarts Express' (Harry Potter train) through the Scottish Highlands, taking a canal boat tour through the waterways of England, spotting wildlife in the Scottish Highlands, a food tour on London's best foodie markets, and visiting Windsor Castle as well as hiking on the South West coast.

Areas of strength for the UK:

Contemporary culture, culture in general, vibrant city life and sports

Source: Ipsos-Anholt Nation Brands Index 2020 and 2018, VisitBritain/Ipsos 2016, VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (2)

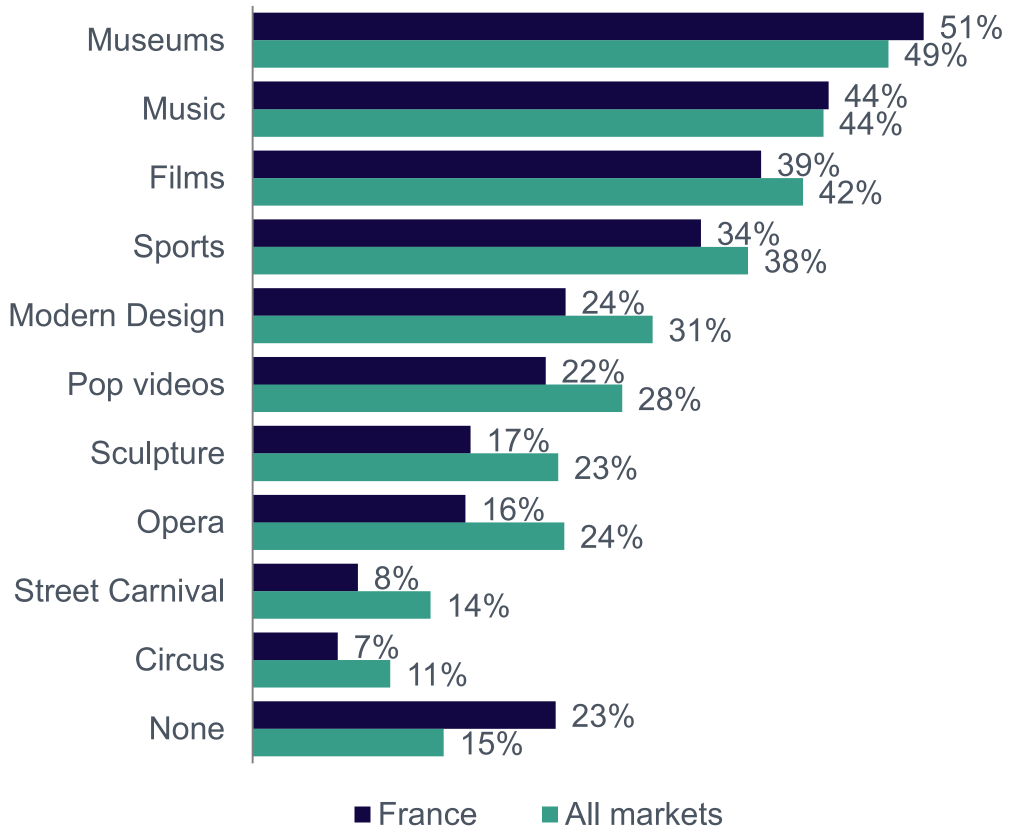
UK's ranking (out of 50 nations)

Measure	French respondents	All respondents
Overall Nation Brand	**8**	**2**
Culture (overall)	**4**	**3**
The country has a rich cultural heritage	7	6
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4
The country excels at sports	5	3
People (overall)	**15**	**4**
If I visited the country, the people would make me feel welcome	18	11
Tourism (overall)	**9**	**4**
Would like to visit the country if money was no object	14	5
The country is rich in natural beauty	31	23
The country is rich in historic buildings and monuments	7	5
The country has a vibrant city life and urban attractions	5	4

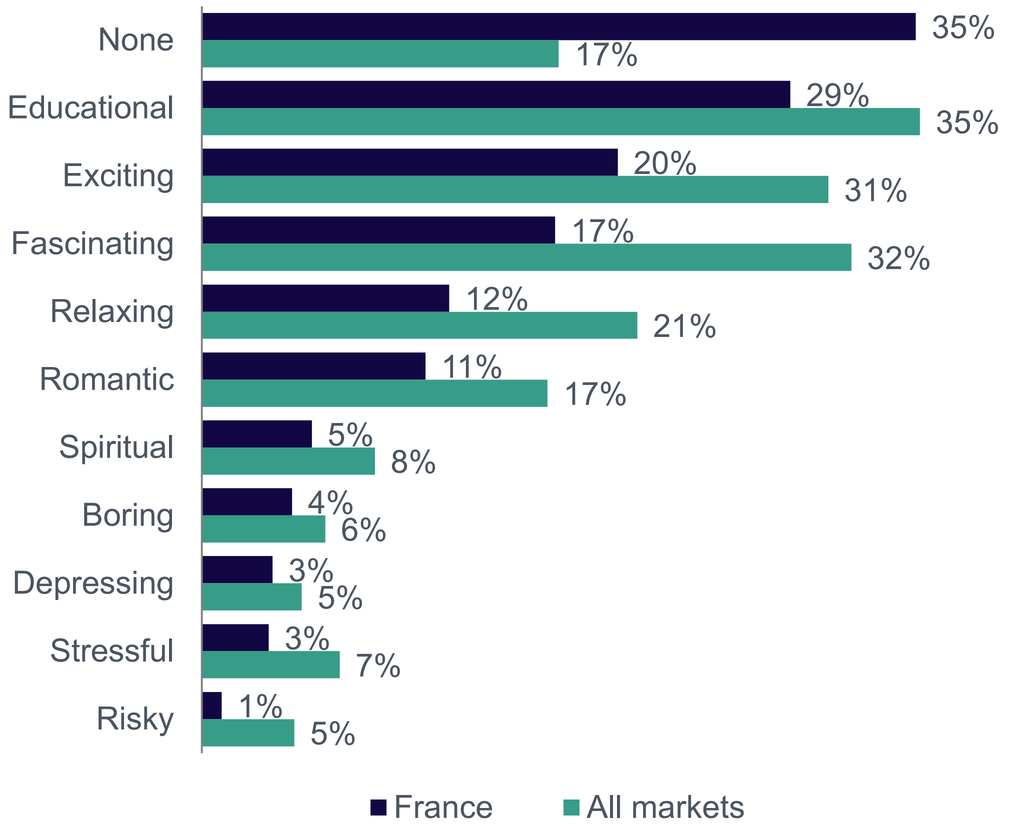
Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	NL	IT	AU	US	GE
6.11	Enjoy the beauty of the landscape	14%	17%	42%	62%	50%	11%
5.83	Get some sun	2%	4%	33%	53%	23%	2%
5.82	Offers good value for money	19%	19%	31%	11%	14%	18%
5.80	Enjoy local specialities (food and drink)	9%	10%	56%	15%	11%	12%
5.79	Do what I want when I want spontaneously	23%	10%	23%	22%	29%	6%
5.77	Explore the place	15%	11%	29%	41%	43%	6%
5.74	The people are friendly and welcoming	16%	24%	35%	30%	23%	17%
5.72	Have fun and laughter	22%	15%	24%	26%	35%	6%
5.70	Experience activities/places with a wow factor	14%	12%	31%	58%	58%	8%
5.66	Soak up the atmosphere	18%	15%	31%	40%	27%	8%
5.59	Do something the children would really enjoy	17%	14%	23%	29%	40%	15%
5.58	See world famous sites and places	30%	15%	55%	33%	51%	21%
5.52	Enjoy peace & quiet	8%	16%	15%	39%	12%	9%
5.50	Experience things that are new to me	10%	9%	14%	61%	53%	5%
5.48	Be physically healthier	15%	14%	16%	27%	22%	13%
5.48	Visit a place with a lot of history/historic sites	29%	12%	61%	13%	23%	18%
5.47	Broaden my mind/ Stimulate my thinking	25%	19%	30%	49%	44%	17%
5.46	Chill/ slow down to a different pace of life	8%	11%	16%	21%	16%	5%
5.41	Provides a wide range of holiday experiences	19%	15%	29%	55%	60%	14%
5.40	A good place to visit at any time of year	20%	15%	34%	36%	38%	15%
5.39	Feel connected to nature	10%	17%	25%	62%	27%	5%
5.38	Enjoy high quality food and drink (gourmet food	7%	11%	55%	9%	11%	13%
5.35	It offers unique holiday experiences	15%	14%	26%	62%	55%	12%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

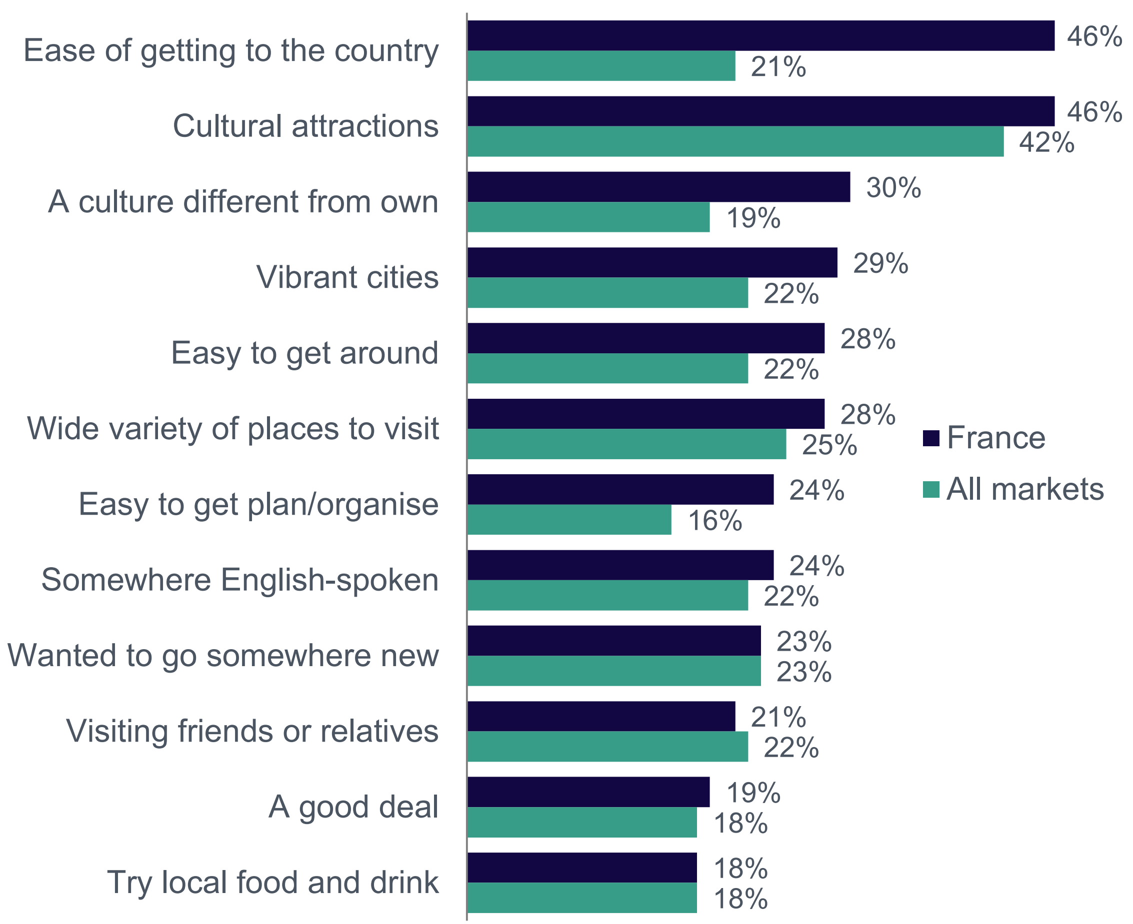
Holiday wants and % saying destination is best place for… bottom 20

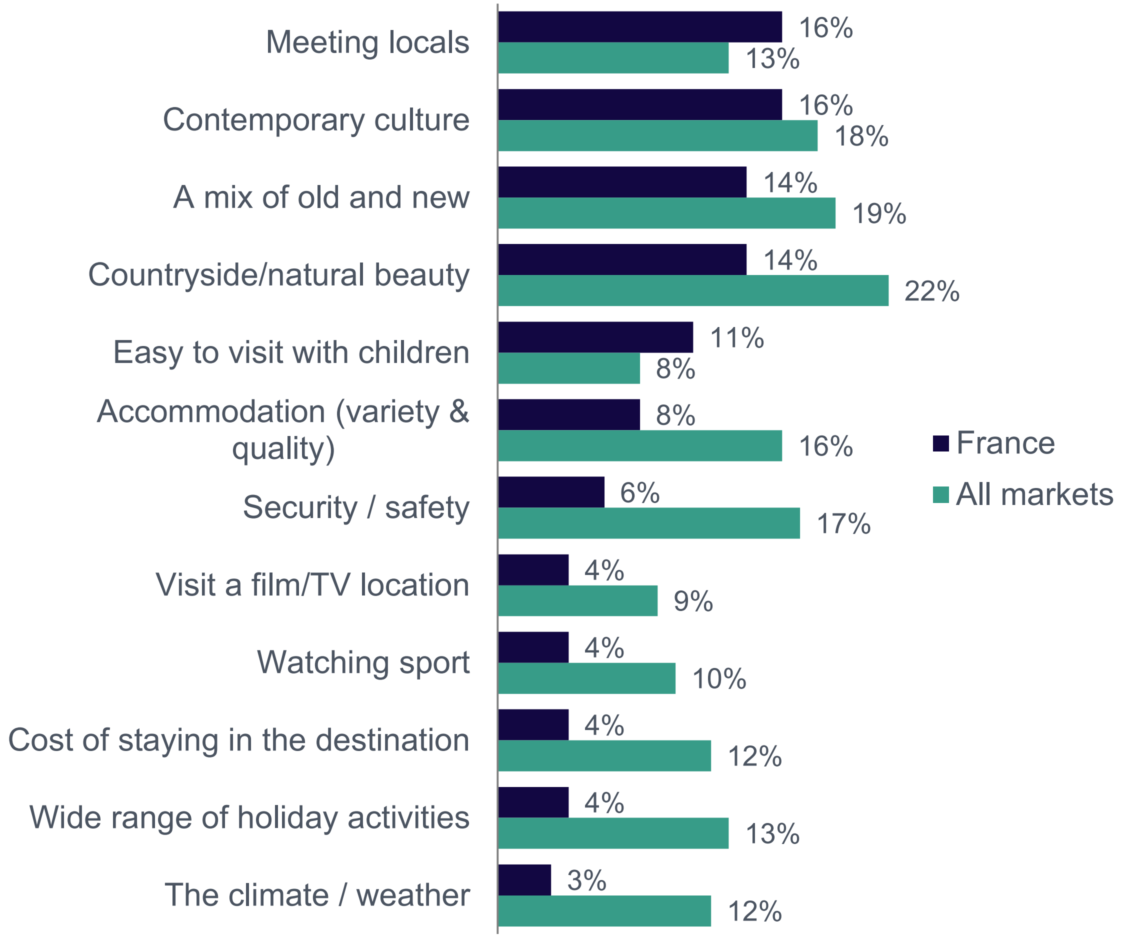
Importance	Perception	GB	NL	IT	AU	US	GE
5.34	Have dedicated time with my other half	29%	24%	47%	43%	37%	23%
5.29	Get off the beaten track	9%	10%	13%	55%	34%	9%
5.25	Meet the locals	15%	14%	17%	32%	27%	13%
5.11	Easy to get around by public transport	34%	26%	24%	16%	33%	28%
4.88	Revisit places of nostalgic importance to me	20%	7%	28%	19%	21%	11%
4.72	Party	33%	24%	34%	34%	47%	16%
4.71	Do something environmentally sustainable/ green	20%	35%	19%	38%	28%	38%
4.58	Experience adrenalin filled adventures	16%	18%	17%	51%	50%	16%
4.54	Visit places important to my family's history	13%	8%	21%	18%	19%	14%
4.43	To participate in an active pastime or sport	19%	22%	28%	34%	29%	22%
4.42	Good shopping	39%	19%	32%	20%	51%	15%
4.33	Go somewhere that provided lots of laid on entertainment/nightlife	39%	34%	39%	39%	58%	28%
4.27	Meet and have fun with other tourists	26%	23%	52%	57%	30%	12%
4.25	Feel special or spoilt	21%	14%	35%	43%	52%	8%
3.88	Do something useful like volunteering to help on a project	29%	14%	9%	26%	23%	26%
3.62	Watch a sporting event	36%	17%	35%	24%	41%	29%
3.41	Fashionable destination	21%	11%	23%	47%	51%	8%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination

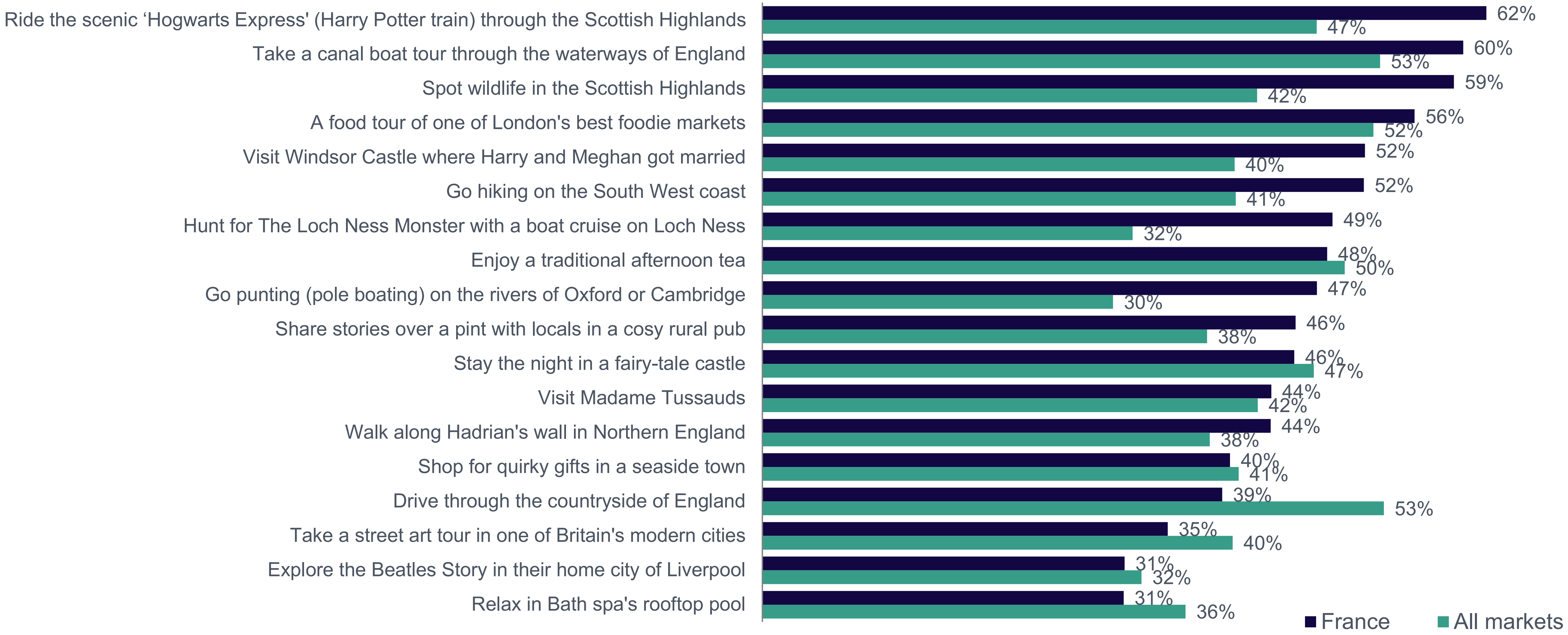




Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of the UK (7)

Sought-after Britain activities – top 18

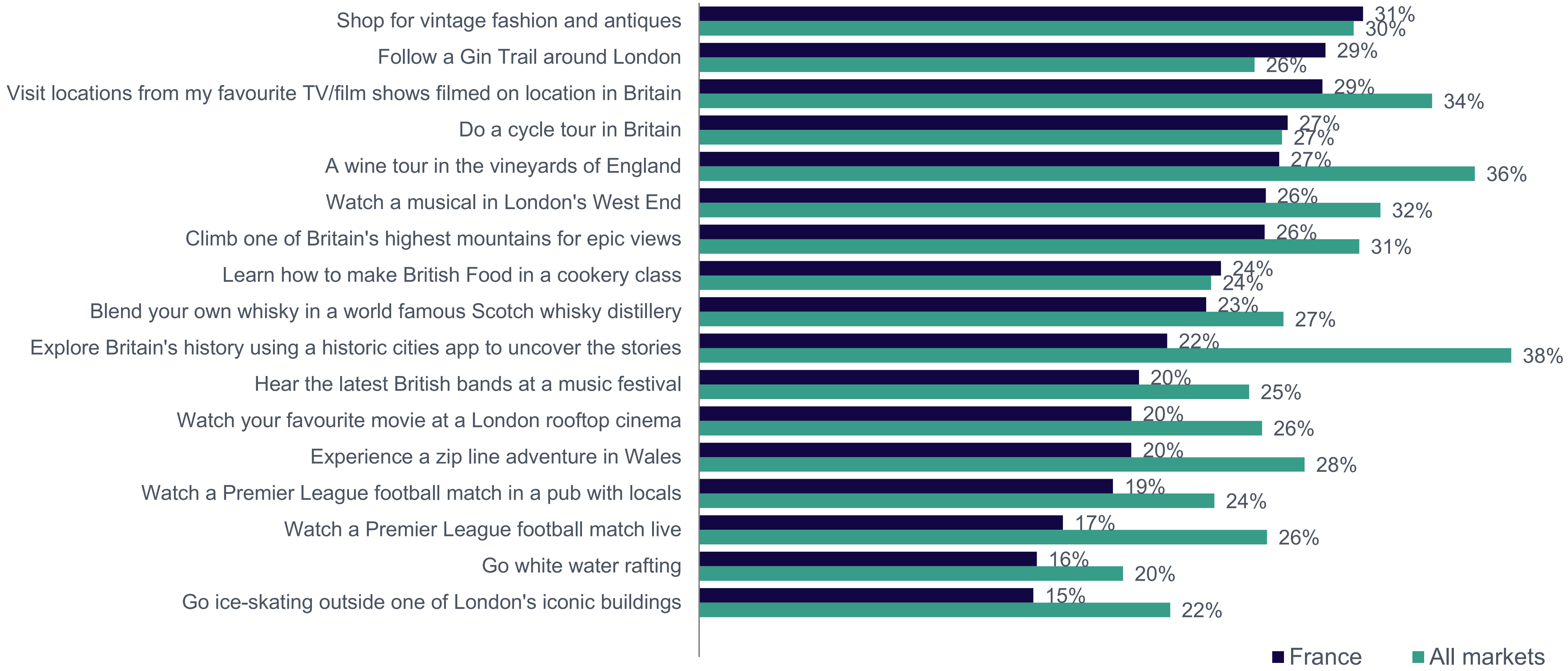


Source: Ipsos-Anholt Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

VisitBritain VisitEngland

2.3 Perceptions of the UK (8)

Sought-after Britain activities – bottom 17



Source: Ipsos-Anholt Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

Understanding the market

Chapter 3

3.1 Structural drivers

- France has a population of slightly more than 67 million. The birth rate is higher than in most other European countries.
- GDP per capita and growth rates are similar to the Eurozone average.
- There are 13 regions, some of which have been regrouped in 2016: Auvergne-Rhône-Alpes, Bourgogne-Franche-Comté, Bretagne, Centre-Val de Loire, Corse, Grand Est, Hauts-de-France, Ile-de-France, Normandie, Nouvelle-Aquitaine, Occitanie, Pays de la Loire, Provence-Alpes-Côte d'Azur. There are also 12 overseas territories, such as Guadeloupe, Guyane, Martinique, Mayotte, La Réunion, French Polynesia and New Caledonia.
- The highest populated areas are the north and southeast as well as cities led by Paris.
- The official language is French; English is taught as the first foreign language in school.
- French employees receive an average of 25 days annual leave. A 35h-week means that those who work more often take extra days off.

67.3m

French population
(2019)

Source: Oxford Economics, CIA World Factbook 2021

3.1 Structural drivers: general market overview

General Market Conditions

- France is the UK's largest European and second largest source market overall in terms of visits, and fourth most valuable in terms of visitor spending in 2019.
- French GDP had seen growth in 2019, before a sharp contraction of 8.2% in 2020 overall as a result of the Covid-19 pandemic.
- The impact from the second lockdown on growth in Q4 2020 was milder than expected with a fall of 1.3% and the prospect for Q1 2021 is for a further fall amid a tightening of restrictions to contain the spread of COVID-19 due to a third pandemic wave, while the vaccine roll-out continues.
- GDP is expected to return to growth later in 2021 resulting in a 5.0% increase for the year overall.

Key demographic and economic data

Measure (2019 data)	France	Eurozone
Population (m)	67.3	338.9
GDP per capita PPP (US$)	43,219	44,676
Annual average GDP growth over past decade (%)	1.4	1.4
GDP growth year-on-year (%)	1.5	1.3

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	1.5%	-8.2%	5.0%	4.6%
Real consumer spending growth	1.5%	-7.3%	3.2%	4.0%
Unemployment rate	8.1%	7.8%	9.0%	9.3%

Source: Oxford Economics

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2019)	67.3
Median age (2020)	42 years old
Overall growth rate (2019-2024)	1.2%

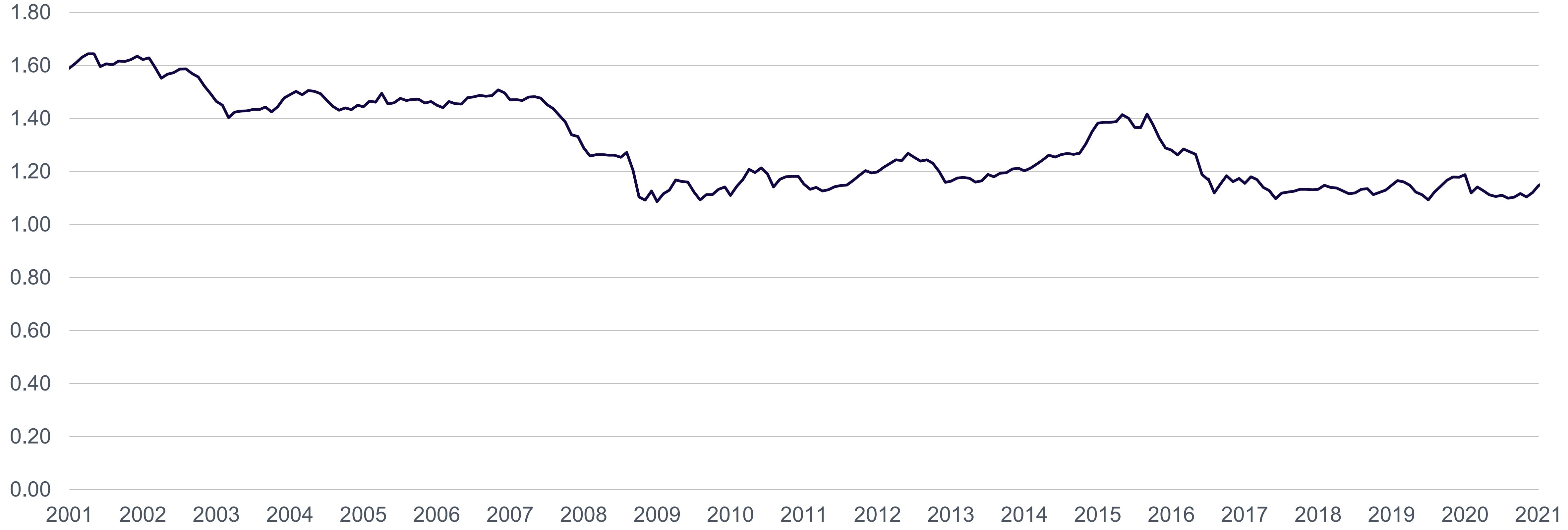
Indicator	1980	2015	2030	2050
Median age (in years)	32.4	41.2	44.1	45.9

- 81% of the French live in urban areas (World Bank estimate).
- The French population is forecast to grow. France remains among the most fertile countries in the EU with an average of two children per woman.
- The official language is French; English is taught as the first foreign language in school.
- French employees receive an average of 25 days annual leave. A 35-hours week means that those who work in excess can often take extra days off.
- According to the Capgemini World Wealth Report 2020 there were 702,000 High Net Worth Individuals (HNWI)* resident in France, representing an increase of 11% on 2018. This represents Europe's second-largest and globally the fifth largest HNWI population globally behind the US, Japan, Germany and China.

Source: Oxford Economics, CIA World Factbook 2021, World Bank 2019, Statista 2021, Capgemini World Wealth Report 2020 *definition in appendix

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages [on our website](#).

Source: Bank of England

3.2 Consumer trends

- Despite the pandemic, 60% of French people aged 15 or over went on a leisure trip in 2020.
- Domestic trips are currently in focus: nine-in-ten of French people aged 15 or over stayed within Metropolitan France in 2020 (an increase of 10% for domestic trips vs. 2019).
- The volume of trips with a destination abroad decreased by almost a third compared to 2019 with one-in-five of the French having been on such a trip in 2020 (including French overseas departments and territories). The French still long for taking a trip abroad. VisitBritain's international recovery sentiment tracking research reveals: 79% of the French considered taking an international leisure trip in 2021, showing strong desire to travel. Britain ranks 6th for consideration of the French hoping to go on a European leisure trip.
- Holiday spend on the main holiday decreased to an average of €1,530 in 2020 attributed to the unavailability particularly of on-side activities and attractions as well as a focus on core holiday content.
- More than four-in-five (81%) of French who took a trip in 2020 prepared it online and 60% of them booked all or part of the trip online.
- Reassurance about health and safety precautions are vital for French holiday choices and decision-making.

81% of French travellers prepare their travel online.

Sources: L'Echo Touristique and Amadeus; Veille Info Tourisme; Tour Hebdo and Raffour Interactif/Opodo 2021; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

3.2 Consumer trends: overall travel trends (1/2)

Travel trends

- French visitors are eager to travel as soon as it becomes possible again. France is the preferred destination, however, the French are still longing to travel abroad with European destinations top of the list.
- Nature and off-the-beaten-track destinations (away from crowded places) are trending.
- Reassuring the French about health, safety and sanitary precautions taken at hotels, at the airport etc. is crucial for helping them make their choices. Contactless technology in transport, accommodation, and infrastructure like airports plays an essential role in reducing touchpoints and reassuring potential travellers.
- Booking via travel agents seems to be more important now. Two-in-five (40%) of the French who travel abroad expect help from their travel agency to solve a problem and to recommend places and activities.
- Flexible terms and conditions when booking a trip are a key condition for the French. 46% of the French think it essential that their next trip is 100% refundable if need be.
- Due to the uncertainty, smaller booking windows with very last minute bookings are very common at the moment.
- The pandemic has also accelerated a desire among the French for making more sustainable travel choices. According to Booking.com, more than three-in-five French expect the sector to offer more sustainable options. Considerations which are increasing include travelling less frequently but longer, trips which are taking the environment more into account, making different transport choices.
- Working remotely, the so-called “télétravail”, is also increasingly common among the French as a result of the pandemic. This trend blurs the lines between business and leisure and opens up opportunities for “teletravel”.
- Despite the pandemic, 60% of French people aged 15 or over went on a leisure trip in 2020. Taking a closer look, 33% went on a short stay in paid accommodation (down 4% vs. 2019), 35% went on a long stay in paid accommodation (down 6% on 2019) and 30% went on a long trip staying with family, friends or at a second home (4% lower than in 2019).

Sources: L’Echo Touristique and Amadeus; Veille Info Tourisme; Tour Hebdo and Raffour Interactif/Opodo 2021

3.2 Consumer trends: overall travel trends 2/2)

Travel trends

- Nine-in-ten of French people aged 15 or over stayed within Metropolitan France in 2020 (an increase of 10% for domestic trips vs. 2019). One-in-five went to a destination abroad including the French overseas departments and territories (a decrease of 32% compared to 2019). These figures include 10% of French respondents who went on a domestic trip and a trip abroad in 2020.
- The budget devoted to the main holiday in 2020 stands 30% lower than in 2019: €1,530 in 2020 compared to €2,190 in 2019. This decrease is due to the closure and unavailability of some activities due to the restrictions as a result of the COVID-19 pandemic situation in Metropolitan France (including the unavailability of on-site leisure and activities of all types). According to Opodo, it is also attributed to a focus on more "essential" content.
- More than four-in-five (81%) of French who took a trip in 2020 prepared it online and 60% of them booked all or part of the trip online.

Sources: Tour Hebdo and Raffour Interactif/Opodo 2021

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on French travel behaviour

- 2020 saw an estimated 67% year-on-year decline in volume and 68% decline in value of visitation from France to the UK as a result of the COVID-19 pandemic.
- The first wave of VisitBritain's international recovery sentiment tracking research reveals: 79% of the French considered taking an international leisure trip in the next 12 months (fieldwork 2nd-16th December 2020), showing strong desire to travel. Of them, 66% are considering Europe and 8% Britain.
- Britain ranks 6th for consideration of the French hoping to go on a European leisure trip, behind Spain, Italy, Portugal, Greece and Germany, ahead of Croatia, Austria, Belgium and Finland.
- As of December 2020, more than a third of the French had not given much thought to planning their next leisure trip abroad and another 28% had started thinking about it but not yet decided where to go showing a considerable opportunity to influence destination choice for when the time is right to travel again.
- Two thirds of the French (66%) would like to go to less crowded places even if it means missing 'must-see' attractions and more than three-in-five expect to book last minute.

Key activators for an international leisure trip	France	All markets
Money-back guarantee should I wish to cancel my trip	45%	36%
Significant decrease in coronavirus cases at destination	37%	38%
Removal of quarantine policies in destination country	36%	36%
The availability of a vaccine/treatment against coronavirus	28%	41%
Removal of quarantine policies in home country	28%	30%
Hygiene & safety protocols at destination	28%	34%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.3 Booking and planning

- A large proportion of French holiday visitors tend to start thinking about their trip early with 42% doing this as early as half a year or more in advance.
- 37% of bookings were made in the three to six month window before the arrival to Britain; however, more than half of French bookings happened within two months before the trip.
- French visitors have become increasingly comfortable with booking their trips to Britain online, especially when they booked travel (i.e. transport to Britain).
- Close to one-in-five bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 27%.
- The proportion of the French who purchase tickets for sightseeing, performing arts or sports events before the trip was below the all market average across all categories. Half of the French bought tickets/passes for other tourist attractions during the trip and nearly one in four purchased guided sightseeing tours in London also during their stay.

>50%
of French visitors booked within two months of their arrival in Britain

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	France	All markets
Online	87%	85%
Face-to-face	10%	10%
By phone	1%	4%
Don't know	1%	1%

- French visitors have become increasingly comfortable with booking their trips to Britain online, especially when they booked travel (i.e. transport to Britain).
- About one in five bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 27%.

How trips to Britain were booked: accommodation only

Booking method	France	All markets
Online	71%	70%
Face-to-face	5%	6%
By phone	4%	3%
Did not book/stayed with friends/relatives	19%	18%
Don't know	1%	2%

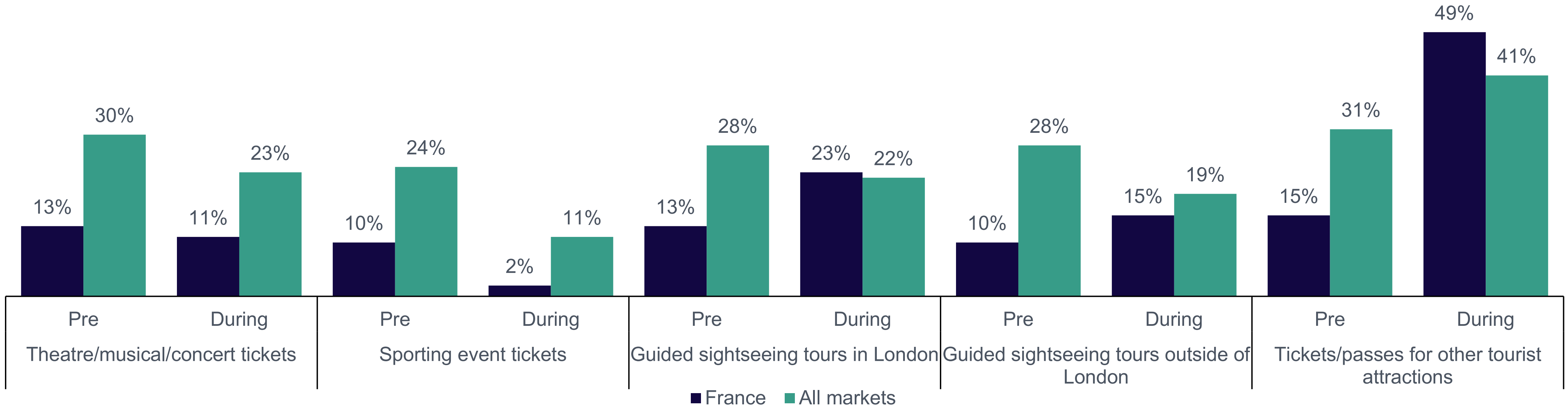
How trips to Britain were booked: travel + accommodation

Booking method	France	All markets
Online	78%	64%
Face-to-face	17%	26%
By Phone	2%	9%
Don't know	3%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Prior to trip: The proportion of purchases of the above items before the trip was below the all market average across all categories amongst French respondents.
- During the trip: Half of the French bought tickets/passes for other tourist attractions. Nearly one in four purchased guided sightseeing tours in London.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	France	All markets
6+ months	42%	49%
3-6 months	29%	31%
1-2 months	18%	13%
Less than 1 month	8%	5%
Don't know	3%	3%

Deciding on the destination

Lead time	France	All markets
6+ months	34%	32%
3-6 months	33%	38%
1-2 months	19%	19%
Less than 1 month	10%	7%
Don't know	4%	3%

Looking at options/prices

Lead time	France	All markets
6+ months	18%	21%
3-6 months	39%	37%
1-2 months	25%	27%
Less than 1 month	14%	12%
Don't know	4%	4%

Booking the trip

Lead time	France	All markets
6+ months	7%	14%
3-6 months	37%	32%
1-2 months	29%	28%
Less than 1 month	23%	21%
Don't know	4%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- Two in five of the French visitors tended to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 29% did this three to six months in advance.
- 67% made their decision to travel to Britain at least three months prior to the actual journey (half of these six months or earlier).
- Almost two in five French visitors looked at options and prices between three and six months ahead of the trip and 37% also made the booking in the same time frame. One in four were more spontaneous and looked at options between one and two months before the trip and 14% within one month. 23% booked their trip to Britain in the month leading up to the departure. This shows a slightly higher tendency of French visitors to make their booking closer to the departure than the all market average.
- Most of the French visitors who booked travel and accommodation separately booked it directly with the service provider (80% and 65% respectively). 48% of those who booked accommodation combined used a travel agent/tour operator or travel comparison website.

More than half
of the French booked within two months of arrival in Britain even prior to the COVID-19 pandemic.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- The most influential source for destination choice for French visitors are friends, family and colleagues followed by travel guidebooks, information from search engines and websites providing traveller reviews and price comparison.
- Whilst travel providers and online sources such as social media are popular for researching and making a destination choice, still two in five French consult travel guidebooks.
- Almost two in five of the French state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- French, on average, watch 3.58 hours of TV per day (18 min. more than in 2019 due to lockdowns during the Covid-19 crisis) and listen to the radio for 2.48 hours per day during the week and 2h33 at week-ends.
- The Covid-19 pandemic affects particularly the print media landscape in France and has boosted the offering of digital content. Online media visits skyrocketed in the twelve months up to June 2021, boosted by the pandemic situation with an average of 10 million additional visits per day recorded over one year.

Friends, family & colleagues

#1 Influence for the destination choice of the French

Source: VisitBritain/IPSOS 2016, Ipsos-Anholt Nation Brands Index 2017, Audience TV 2020/ Mediametrie, Mediametrie 1260000 Radio Survey December 2020, Kantar Media, Reuters Institute, ACPM diffusion presse 2020, CSA

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- The French watch TV for 3.58 hours on average each day, 18 min. more than in 2019 due to various Covid lockdowns. (Audience TV 2020/Mediametrie)
- National public TV channels which are part of the France Televisions group: France 2; France 3, France 4, France 5. France 3 has channels in all regions of France. France O, the channel for overseas territories, ceased in 2020 and has been temporarily replaced by CultureBox, a culture channel meant to support artists during Covid times.
- Commercial TV landscape: TF1 group (TF1, TMC, TFX, TF1 Séries Films, LCI), M6 group (M6, W9, 6ter, Paris Première, Téva, Série Club, Gulli, Canal J, TiJi, MCM, MCM Top et RFM TV), Canal + group (Canal +, C8, CNews, Cstar and a number of themed channels), NextRadioTV group (BFM TV), NRJ group (NRJ 12), some local TV channels and teleshopping channels.
- Dedicated travel programmes: "Faut pas Rever" (France 3), "Thalassa" (France 3), "Echappées Belles" (France 5), "Rendez-vous en Terre Inconnue" (France 2), "Invitation au Voyage" on the German-French channel ARTE.

Radio

- 900 radio operators in France, over 100 major public or commercial radio stations and large number of smaller private ones. Hardly any of them have any dedicated travel programme but they still offer good media opportunities and they have apps for smartphones and tablets to increase their audience reach. (CSA)
- 41.6 million French (76% of the population) listen to the radio everyday for an average of 2.47 hours per day.

Newspapers

- 97% of the French population read at least one publication per month, 85% of readers aged 15-24 read their newspaper online.
- The main publishing houses are gathered in Paris and there are major regional dailies such as Ouest France (circulation: 625,896).
- There are 9 national dailies and 66 regional dailies in France. The biggest national newspapers include: Le Figaro (circulation: 331,927 copies), Le Monde (circulation: 393,109), Le Parisien (circulation: 180,850), Les Echos (circulation: 133,429) and L'Equipe sports newspaper (circulation: 217,068) which saw its circulation decrease due to sport events being cancelled in 2020.
- Before Covid, most newspapers had weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists. Due to the pandemic, some did not appear and/or with content focused on destinations in France.

Source: Audience TV 2020/Mediametrie, Mediametrie 1260000 Radio Survey December 2020, ACPM diffusion presse 2020, CSA

3.4 Reaching the consumer: magazines and online media

Magazines

- There are more than 300 major registered (ACPM) consumer magazines in France (50.9 million French read a magazine or a newspaper each month, i.e. 96% of the population) with TV magazines having the highest circulation (e.g. TV Magazine: circulation of 4 million).
- Travel magazines: Geo (circulation: 131,032), National Geographic France (circulation: 40,076), National Geographic Kids (11,540), NG Traveller France (circulation 20,000 per quarter), Grands reportages (circulation: 15,000), AR Magazine (circulation: 10,000)

Online media

- Online media visits skyrocketed in the period from July 2019 to the end of June 2020, boosted in spring 2020 by the pandemic situation, with an average of 10 million additional visits per day recorded over one year.
- Travel blogs and vlogs are developing fast with hundreds of them available; most are amateur, but 20 to 30 travel blogs/vlogs are now professional. All of them include social media presences. Votretourdumonde.com and bestjobersblog.com are considered among the best travel blogs in France.
- The importance of YouTube has increased over the last couple of years in France and French vloggers are very popular with millions of followers. Most of them are gamers or humourists with a particularly engaged group of young followers. Food vlogs are also increasingly popular.

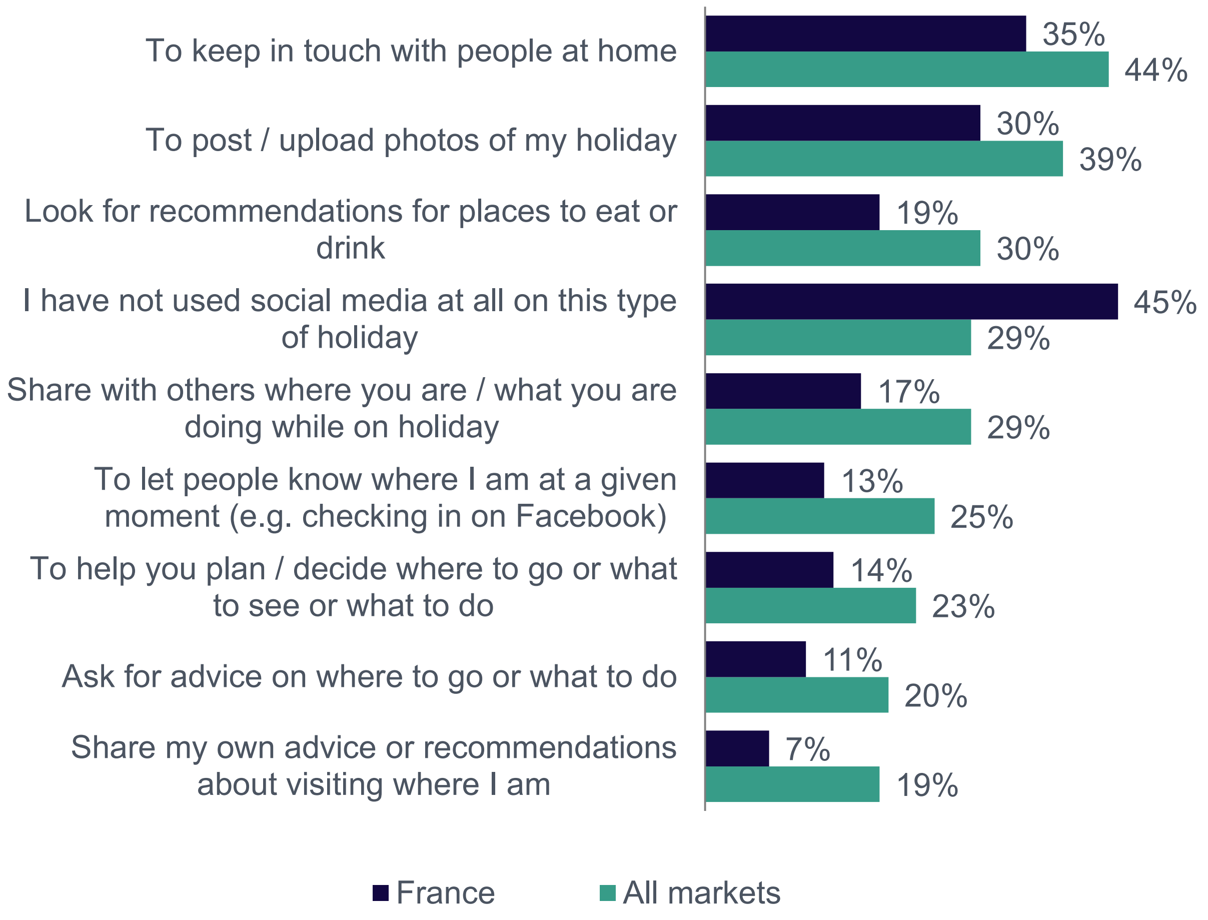
Media trends

- Due to the bankruptcy of Prestalis distribution network, successive lockdowns and advertising crisis linked to Covid-19, 2020 has been a very difficult year for print newspaper and magazines. Leisure, lifestyle and women magazines were the most affected. Competing with online content and social networks, publications are struggling to make a profit.
- The Covid-19 crisis has accelerated the digital transformation and ‘print goes digital’ trend: 68% of newspaper/magazine readers do so on a computer, 45% on a smartphone and 9% on a tablet. 32% still read a print magazine.

Source: ACPM, Kantar Media, Reuters Institute

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

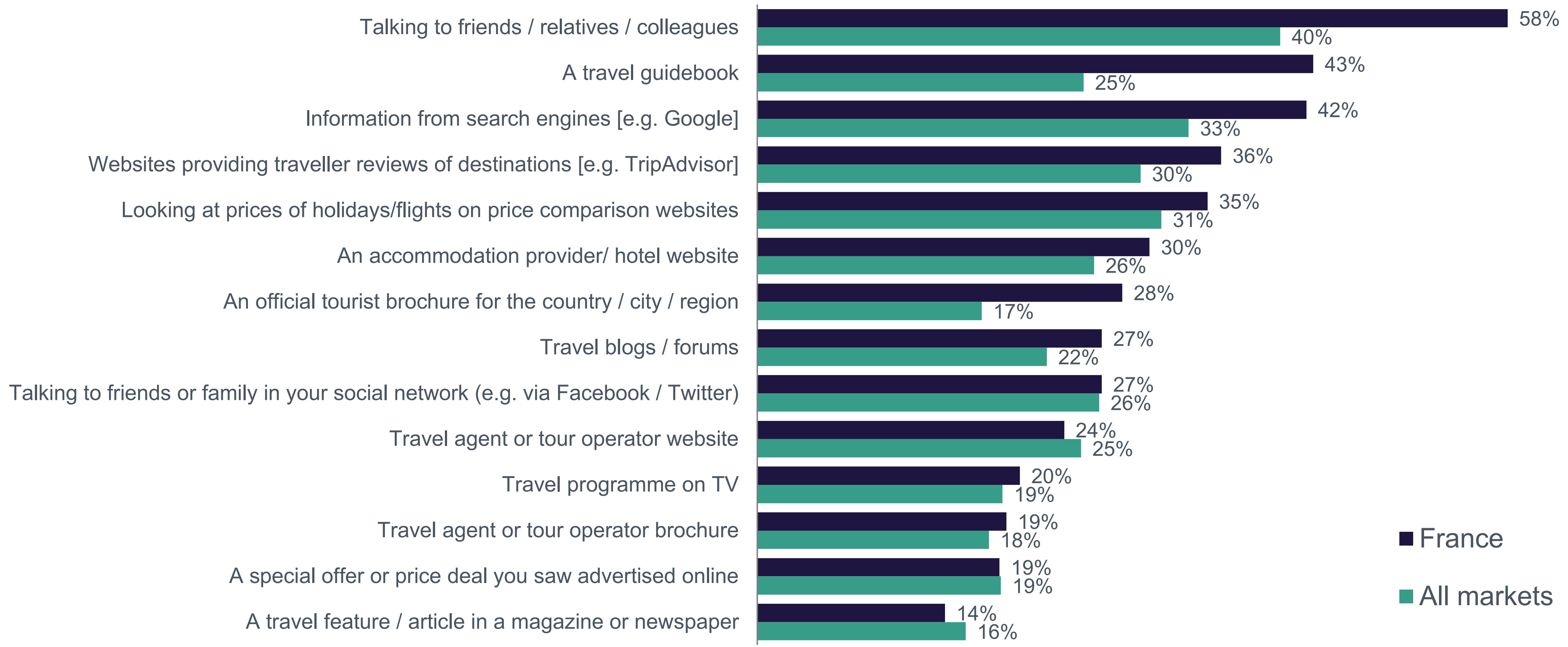


- The social media channels most used in the French market are Facebook, Messenger, Youtube, Instagram, WhatsApp, Snapchat, Twitter, Pinterest, LinkedIn and Google +.
- 35% like to keep in touch with their people at home and 30% like to post/upload their holiday photos.
- 67% like to stay connected whilst they are on holiday and 64% regard a smartphone as essential whilst they are on holiday.
- 80% of French travellers love to take photos when they are on holiday which is similar to many other markets.
- 63% of French travellers have shared holiday photos online or would like to do so and 48% have shared holiday video content or would like to do so. Fewer French respondents than the average from other markets have already used location technology to find places to visit (46%) and a further 32% are interested in using it. 35% enjoy writing reviews on social media of places they have been to on holiday and 44% place trust in reviews on social media from other tourists which in comparison to many other markets is below average.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?, Statista 2021

3.4 Reaching the consumer: influences (top 14)

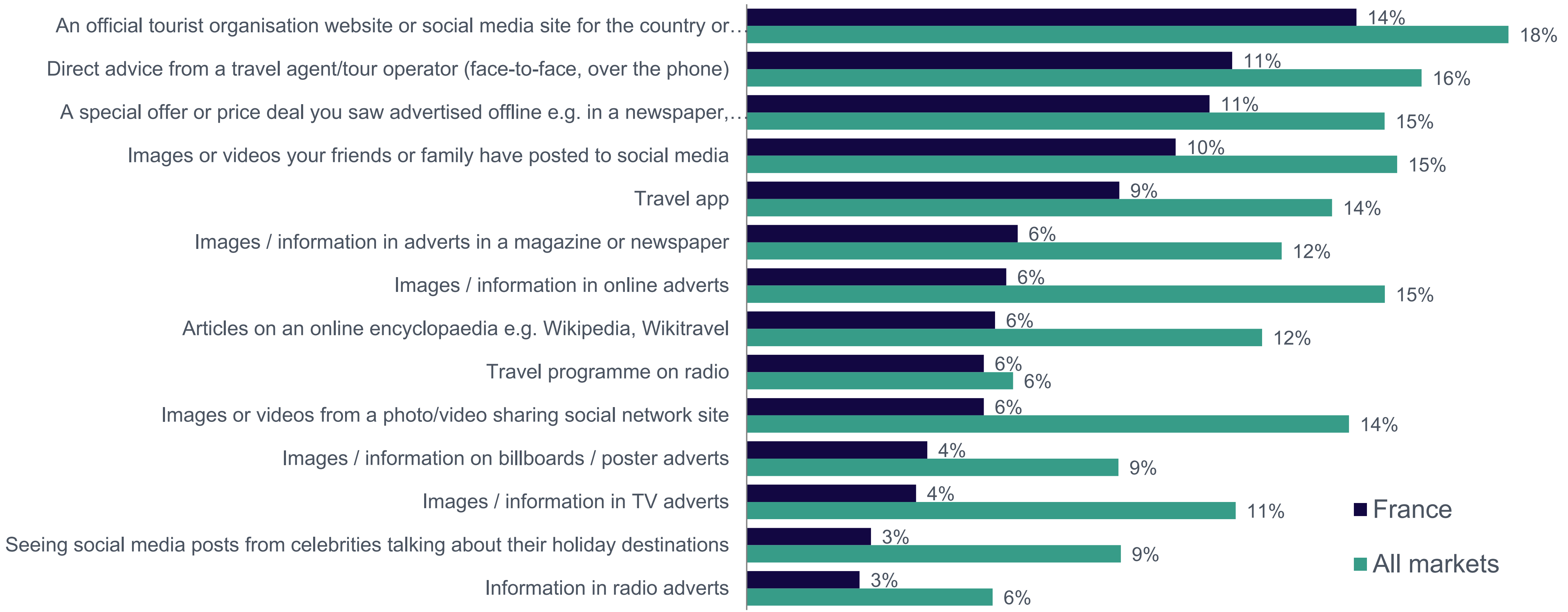
Influences on destination choice – top 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences (bottom 14)

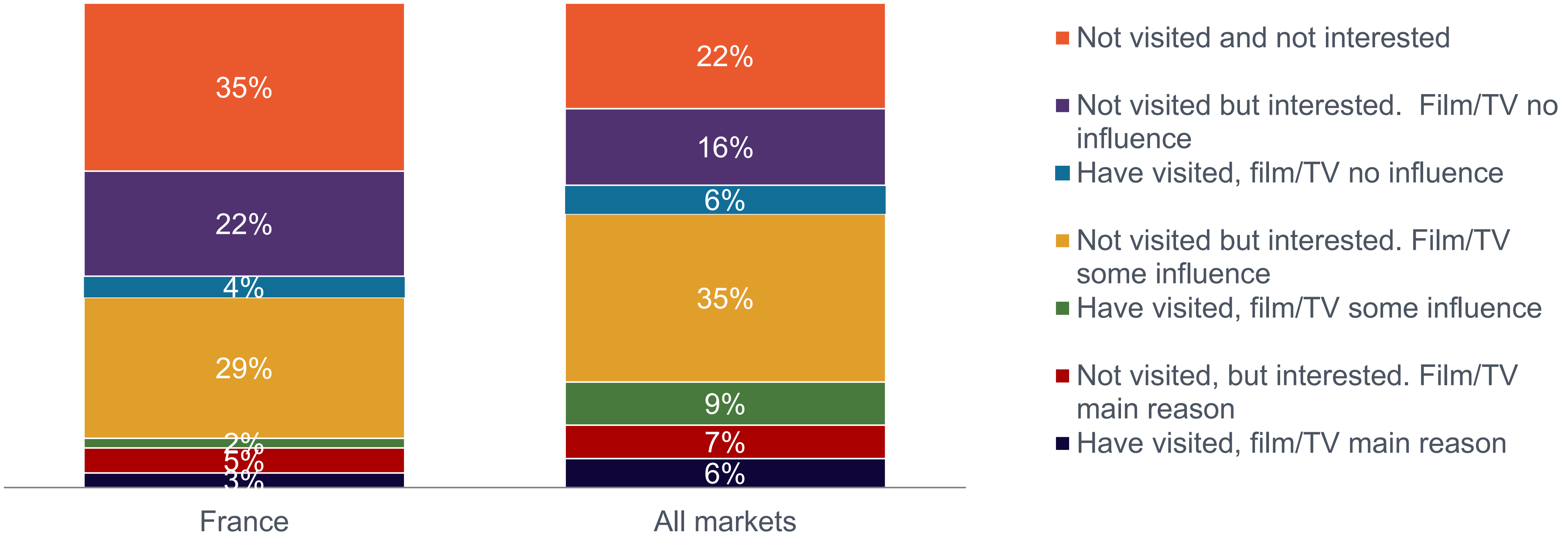
Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



- Almost two in five of the French state some degree of influence of literary, movie or TV locations on their holiday destination choice.

Source: Ipsos-Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Access and travel trade

Chapter 4

VisitBritain/ Guy Richardson

4.1 Access: key facts

- 39% of French visitors travel to the United Kingdom through the Channel Tunnel (75% of them via Eurostar, 13% via coach and 10% with their private vehicle).
- 45% of French visits to the UK were made by plane. It is a short non-stop flight: usually between 1-2 hrs flight time. 16% come to the UK across the sea, i.e. by ferries crossing the Channel.
- Annual seat capacity grew to around 7.5 million seats in 2019, before it declined sharply by 68% in 2020 as a result of the COVID-19 pandemic. The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.
- French visitors departing Britain by air pay £13 in Air Passenger Duty.
- The regional spread of French visitors is supported by the connectivity to many regional airports in the United Kingdom.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

45% of French travel to the UK is by plane, 39% through the Channel Tunnel.

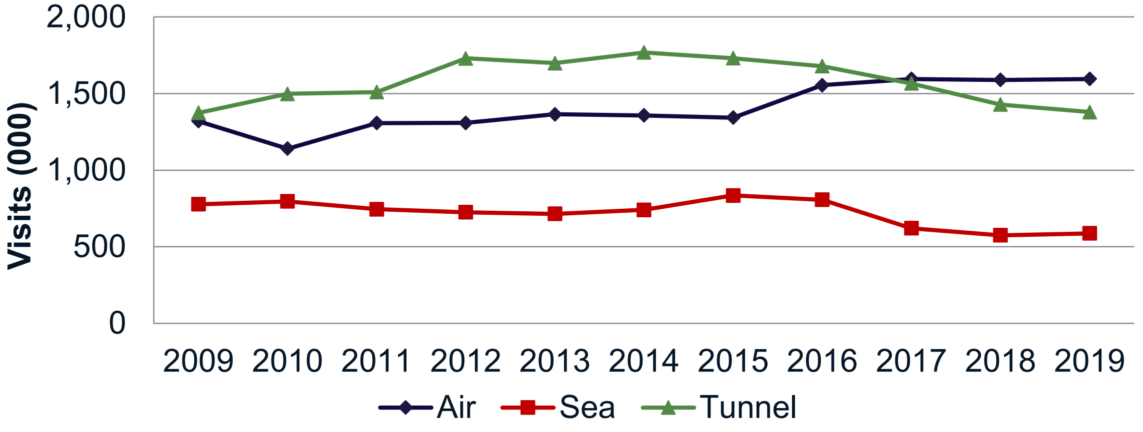
Access to Britain

Measure	2019
Weekly aircraft departures	955
Weekly seat capacity	144,596
Airports with direct routes in France	39
Airports with direct routes in Britain	22
Eurostar trains per day from Paris	19
Weekly ferry crossings	781
Weekly Eurotunnel Shuttles	343

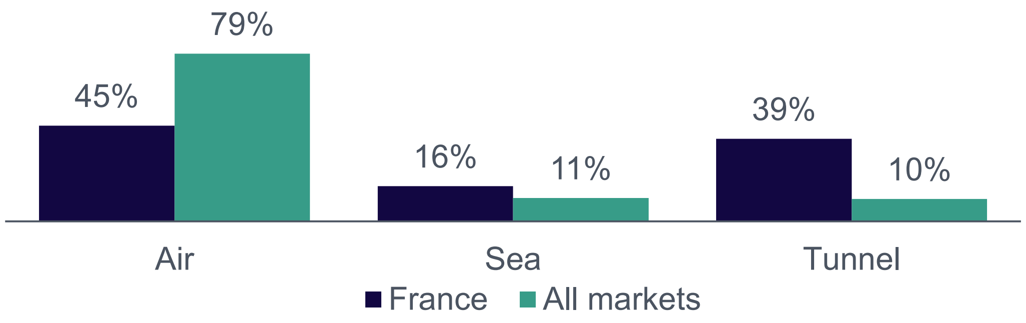
Source: Apex, non-stop flights only, International Passenger Survey by ONS, Eurostar 2019, Direct Ferries 2019

4.1 Access: mode of transport

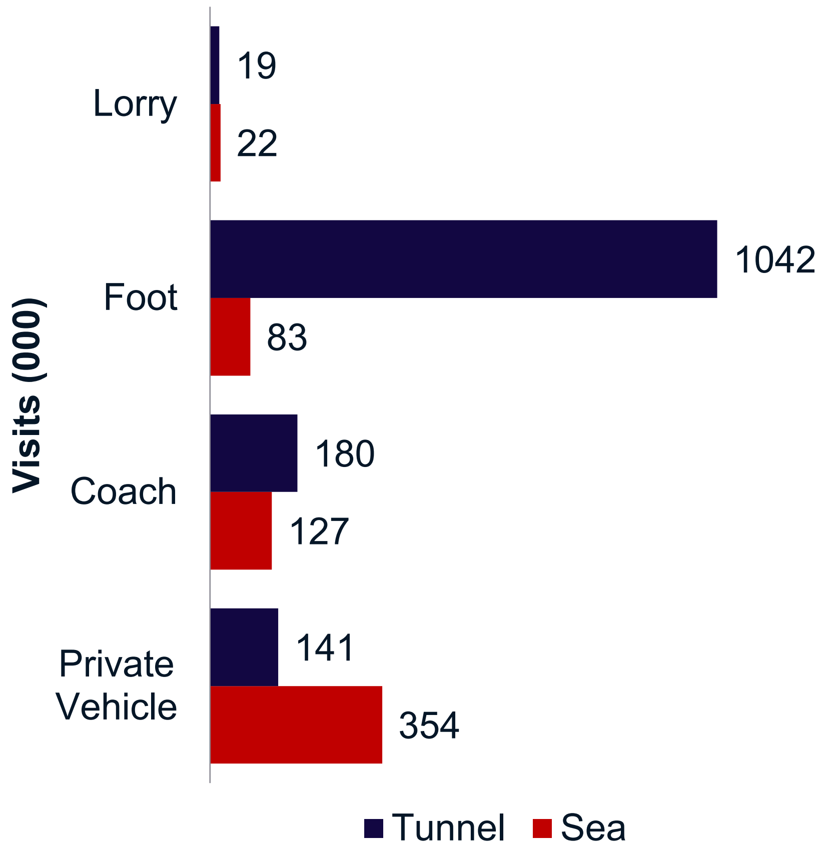
Visits by mode of transport



Annual share by mode (2019)



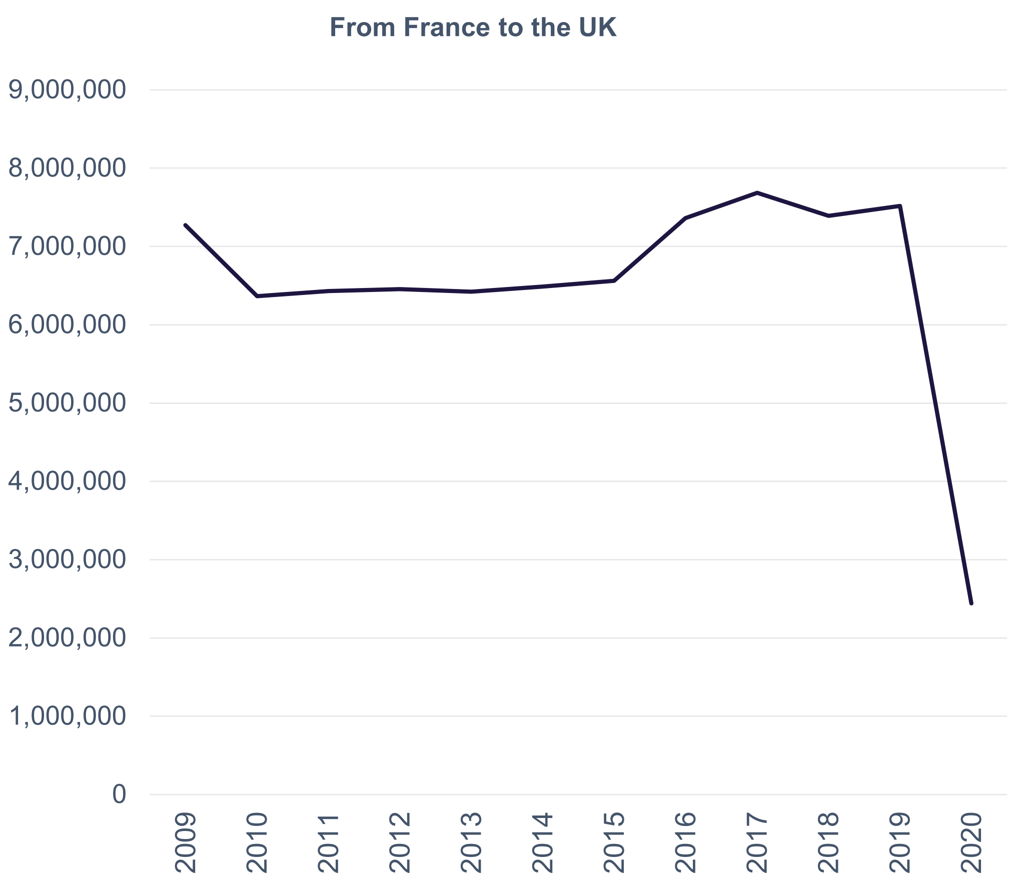
Sea and tunnel travel (000s) in 2019



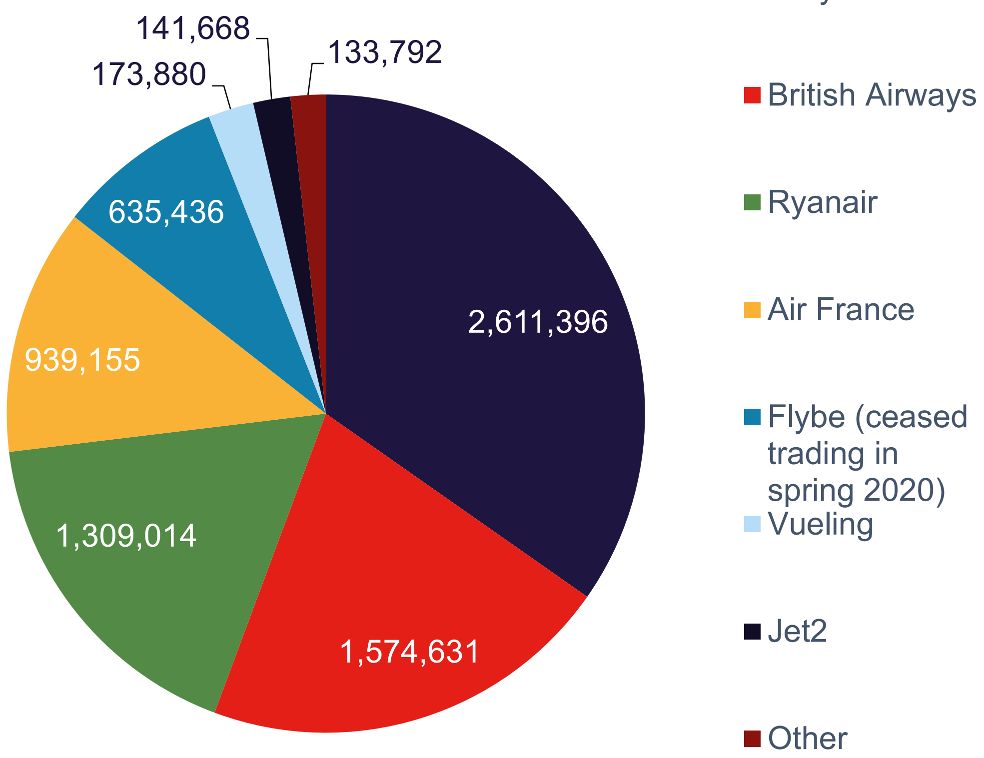
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

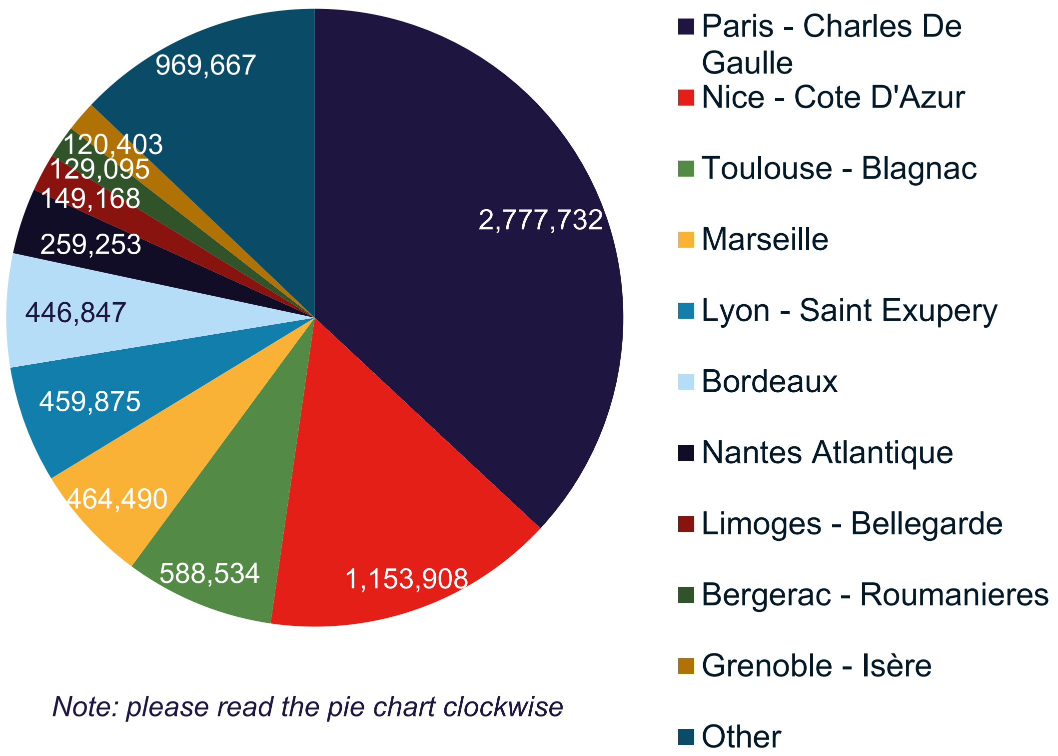


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only. Other groups: TUI Airways, Air Corsica, Thomas Cook Airlines, Transavia France, Wizz Air UK, bmi Regional (ceased operations early in 2019), Germania, Air Austral, TUIfly Belgium and Aurigny Air Services

4.1 Access: capacity (2)

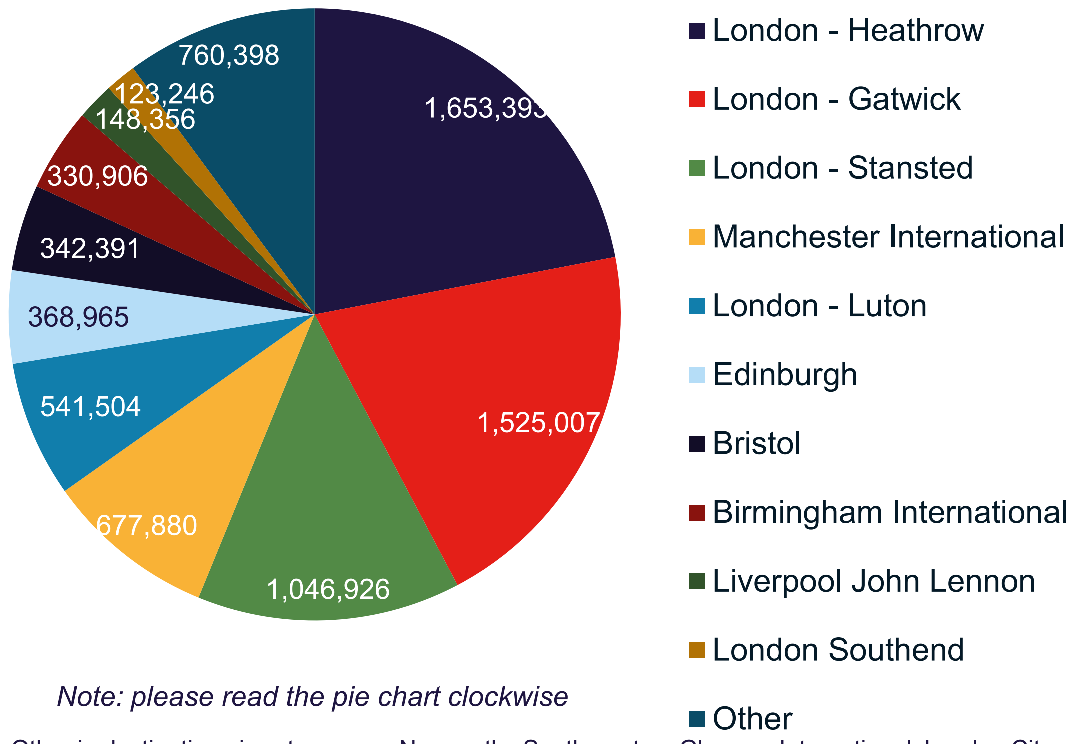
Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Other in origin airports groups: Montpellier-Mediterrannee, Carcassonne-Salvaza, Biarritz-Anglet-Bayonne, Beziers Vias, La Rochelle-Laleu, Chambery, Dinard-Pleurtuit, Rennes-St Jacques, Paris-Orly, Nimes-Garons, Perpignan-Llabanere, Poitiers-Biard, Tarbes Ossun Lourdes, Tours-St Symphorien, Bastia-Poretta, Brest Bretagne, Caen-Carpiquet, Ajaccio Napoleon Bonaparte, Figari-Sud Corse, Clermont-Ferrand-Aulnat, Brive-Souilac, Strasbourg, Rodez-Marcillac, Quimper-Pluguffan, Calvi-Sainte Catherine, Dole-Jura, Avignon-Caum, Toulon-Hyeres, and Pau Pyrenees.

Destination airport seat capacity (2019)



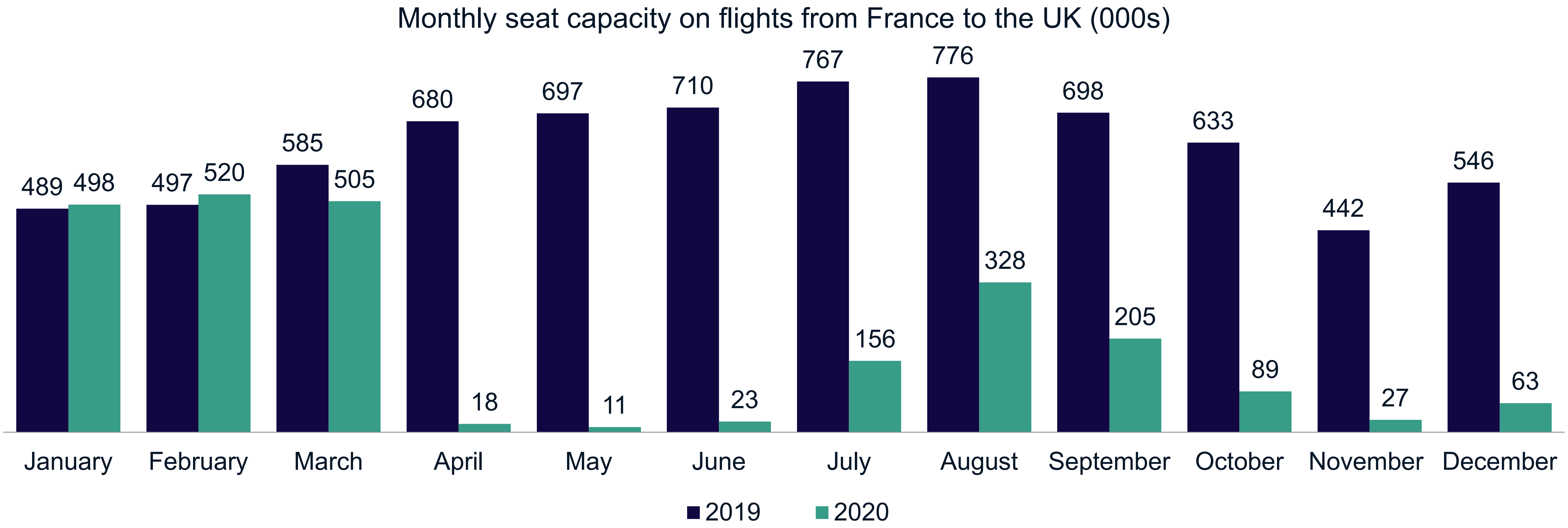
Note: please read the pie chart clockwise

Other in destination airports groups: Newcastle, Southampton, Glasgow International, London City, Belfast International, Leeds/Bradford, East Midlands, Exeter International, Aberdeen, Cardiff, Doncaster Sheffield, and Guernsey.

Source: Apex, non-stop flights only.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity



- Seat capacity on non-stop flights between France and the UK declined by 68% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most since April 2020, and monthly seat capacity was at least 70% behind 2019 levels in subsequent months with the exception of August when it was down 58%.
- The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.

Source: Apex, non-stop flights only.

VisitBritain VisitEngland

4.2 Travel trade: general overview (1)

- The French trade structure is quite complex and fragmented.
- In France, all companies offering travel products and services have to register with Atout France, the national body responsible both for licensing of tourism products and services as well as the promotion of France as a destination. According to the latest industry study from EDV (2016) 4,015 entities were officially registered as travel trade companies. 26% of these companies are located in the greater Paris region.
- Tour Operators (also categorised as ‘producteurs’ or producers) are classified as follows (SNAV, 2016): Generalists, specialists and group operators.
- According to l’Echo Touristique more than 6.3 million customers travelled with members of the Association of French tour operators, SETO, between November 2018 and October 2019 (+7% compared to the previous financial year). There was, however, a growing trend of disintermediation as package sales reduced (-3%) while direct bookings increased dramatically (+28%) prior to the pandemic. It remains to be seen if the uncertainty has made the role of intermediaries even more important to customers to navigate frequent changes to travel conditions as and when it can resume.

Please note that the information provided in this section reflects the situation prior to the COVID-19 pandemic as fundamental market changes are still in progress and comprehensive data are yet to emerge.

Source: SNAV 2016; L’Echo Touristique

4.2 Travel trade: French tour operators (1/2)

Top ten operators in France (31 December 2019)

Top Ten Tour Operators	2019 turnover €m	2018 turnover €m
Groupe Club Méditerranée	1,711	1,617
TUI France	872	987
Groupe Karavel, Promovacances/Fram	N/C	N/C
Groupe Voyageurs du Monde	N/C	466
Groupe NG Travel	268	235
Groupe Salaün	N.C	242
Thalasso N°1/O Voyages	197	180
CroisiEurope/alsace Croisières	196	186
Belambra Clubs	184	188
Exotismes	144	132

Top ten coach operators in France (31 December 2019)

Top Ten Coach Operators	2019 turnover €m	2018 turnover €m
Verdié Agences	107	102
National Tours	44	46
Richou Voyages	N/C	33
Philibert Tourisme	27	25
Michel Voyages	25	24
Sabardu Tourisme	N.C	16
Perrier Voyages	16	18
Transgallia	14	13
Phocéens Voyages	14	15
Voyages Girardot	N/C	14

Source: Tour Hebdo n°1614 – Octobre 2020

4.2 Travel trade: French tour operators (2/2)

Top five major tour operators to Britain by number of pax in 2019 (L'Echo Touristique)

Rank	Tour operator	Number of pax
1	Verdié Voyages	45,043
2	Misterfly	38,539
3	Travel / Visit Europe	3,366
4	Salaün Holidays	3,222
5	TUI France	2,650

Additional tour operators with a comprehensive Britain programme:

Brittany Ferries

Gaéland ASHLING

intermèdes LE VOYAGE CULTUREL

VERDIE VOYAGES

Voyageurs DU MONDE

worldia

Quartier libre

CELTICTOURS

COMPTOIR DES VOYAGES

Source: L'Echo touristique. NB.: Please note that not all major operators have shared data, so some major players are not included in the top five.

4.2 Travel trade: French holidays

National public holidays:

2021	National public holidays
1 January	New Year's Day
5 April	Easter Monday
1 May	Labour Day
8 May	VE Day
13 May	Ascension Day
24 May	Whit Monday
14 July	Bastille Day
15 August	Assumption Day
1 November	All Saints Day
11 November	Armistice Day
25 December	Christmas Day

Source: Officeholidays.com

4.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 19:00.
- When introduced expect to shake hands. Friends greet each other by lightly kissing on the cheeks. Be careful of using first names as they are usually reserved for family and close friends. If your meeting is in French, please make sure you address people as "vous" not "tu" on the first appointment. You should wait until invited before using someone's first name and "tu".
- Check your trip does not coincide with the summer months and the Christmas holiday period. September is always very busy as people come back from holidays. This is also the month when IFTM Top Resa takes place – avoid the week before and after. Tour operators tend to prepare their spring/summer brochures in November/
December and their autumn/winter brochures in May/June.
- Dress code: Business dress tends to be conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made one to two weeks in advance and reconfirm the day before. Be punctual and allow for flexibility around the duration of the meeting.
- Meetings are important to the French. They like to meet the people they work with to build a relationship, a network. First meetings are important for introductions. Further meetings will be to maintain relationships, to discuss business opportunities and make decisions. The French tend to be direct, ask probing questions, analyse the details of a proposal and raise issues they would like to solve with debating skill. Try to avoid high-pressure sales tactics. Agendas tend to be rarely used and not necessarily be adhered to.
- French business behaviour emphasises courtesy, is usually formal and tends to be hierarchical. Mutual trust and respect is earned over time and close personal business alliances are important.
- Face-to-face contact is preferred to written or telephone communication. Honest and open discussion is appreciated and professionalism, knowledge of products, and the market is valued. After an oral agreement is reached, a comprehensive, formal and precisely worded contract is set up which is binding for both sides. Written communication is formal. Small talk is usually kept brief.
- Make sure your printed material is available in French. If you only have English material at least a cover letter or introduction in French would be expected.

4.2 Travel trade: sales calls

Sales calls

The French trade structure is complex and fragmented. It is made up of tour operators and travel agencies (online and offline), with associations and social clubs playing an important role. The travel trade in France is mainly concentrated in Paris. Therefore, before you embark on a sales visit to France, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack about your products in French.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- The French trade look for speakers/sponsorship for upcoming client events, co-marketing for the launch of new programmes, at least one meeting per year, early release of information about upcoming events ideally 12-18 months in advance to make sure it is on time to be integrated in operators' portfolios, training of tour operator staff and travel agents (potentially through webinars and online information) and access to an image database. The information provided should be relevant to the niche market they specialise in.
- Generally, operators start planning for their spring/ summer departures about 12-18 months in advance. School trips are planned from spring of the previous year and most departures will take place in the following year between March and May, with a second wave in July and August.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.

4.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your French business partner out for a meal – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- Credit cards are usually accepted in all restaurants (only double check with the small ones) VISA and Mastercard are most accepted but in some restaurants American Express cards are not accepted.
- Arrive on time and if possible, before the invitee, as punctuality indicates reliability.
- If you order water you will be asked if you want mineral still or sparkling; the ‘carafe d’eau’ (tap water) is another common option, but maybe not for a business invitation.
- Bread is always served and you can order refills any time.
- French normally drink wine with their meals, although not always at lunch time.
- Service charge and VAT are included in the price, therefore tipping is limited. Tips are only given if you are happy with the service provided and rarely more than €5.

4.3 Caring for the consumer

Advice on caring for French consumers

- Expectation levels for standards and services are high – any issues should be resolved promptly.
- The French appreciate documentation and brochures in French.
- Local information and colour – pubs, heritage (castles), gardens and shopping are appreciated.
- French travellers prefer to stay in mid-range accommodation including bed and breakfasts, with en-suite facilities. Country house hotels are popular in France and a good benchmark for the value for money levels expected.
- Youth travellers prefer to opt for youth hostels or university accommodation as they tend to be more price-sensitive.
- Food is one of the great passions of the French people. French cooking tends to be highly refined and involves careful preparation, attention to detail, and the use of fresh ingredients.
- Although they like to change their habits during their holidays (even when it comes to food), there are some areas where the French will not make concessions. Food and drink quality will always be compared with France. Perceptions of British food are below average although 16% cited trying local food & drink as a motivation to travel to Britain.
- The three main meals are le petit-déjeuner (breakfast), le déjeuner (lunch), and le dîner (dinner). Although the midday meal is still the main meal in rural areas, there is a tendency for families to eat the largest meal in the evening. Meal times: On week days, French go to lunch between 12pm and 2pm and dinner is usually served from 7.30-8pm.
- Breakfast is a light meal of bread, cereal, yogurt, and coffee or hot chocolate. Lunch and dinner generally involve several courses, at minimum a first course (entrée) and a main dish (le plat), followed by cheese and/or dessert. They like to spend time over their meals.
- The French will only begin eating after everyone's food has been served and after someone says 'bon appétit'. In France it is polite to finish everything on the plate and be warned that a nearly full wine glass could indicate they do not want any more.

Source: Ipsos-Anholt Nation Brands Index, Arkenford 2013, VisitBritain/IPSOS 2016

Useful links and further information

Appendix

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Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on understanding our customers.

- In France, VisitBritain focuses on two audience segments among the international travellers:
  - **Buzzseekers in France:** active, enjoy foreign cultures. Motivated by cultural attractions, ease of access, vibrant cities, and a variety of places to visit.
  - Explorers in France: mature and open-minded with high interest in culture, arts and history. Enjoy a variety of holidays from seaside, lakes & mountains to gentle activities.

Segments (& global attributes)	Global market share	Market share in France
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	35%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	22%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	22%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	11%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	10%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about France or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- Covid-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about France or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the 2 March 2021 update of the 'Global Travel Service' databank. Other information on France and the Eurozone were updated 23 March 2020.
- **Apex** data was last updated with January 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, March 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: France

April 2021

Destination Bristol ©Gary Newman