



# FRANCE

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A comparison of 2017 and 2023 air services between Scotland and France

# Key Statistics About French Tourists

- 3rd Largest international inbound market to Scotland by visitors
- 8% of overseas tourists to Scotland are French
- French tourists contribute 8% of overseas tourism spending
- Numbers of French tourists are above pre-pandemic levels

# 2017 DIRECT FRENCH ROUTES

## Aberdeen Airport

- Paris CDG

## Glasgow Airport

- Bordeaux
- Carcassonne
- Chambéry
- Grenoble
- Marseille
- Paris CDG

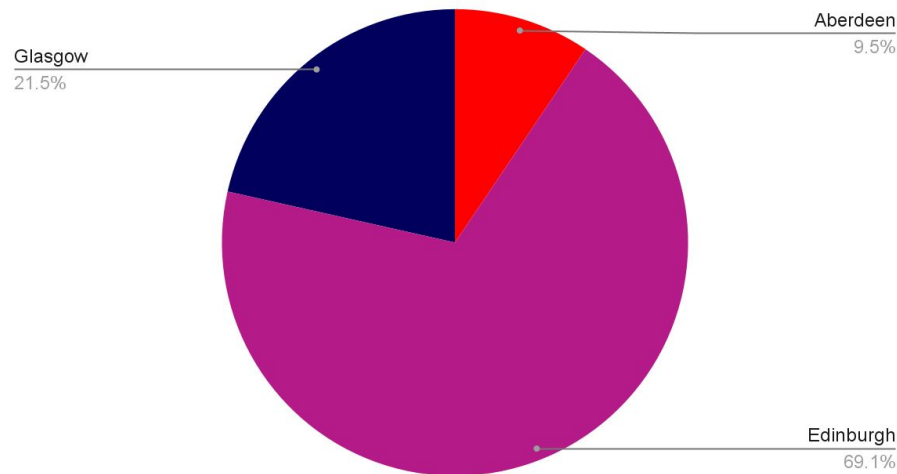
## Edinburgh Airport

- Bergerac
- Berziers
- Bordeaux
- Carcassonne
- Chambéry
- Clermont Ferrand
- Grenoble
- Lyon
- Marseille
- Nantes
- Nice
- Paris CDG
- Paris Orly
- Poitiers
- Toulouse

# 2017 PASSENGER NUMBERS

- Aberdeen - Paris Charles de Gaulle = 85,601
- Edinburgh - Bergerac = 2,429
- Edinburgh - Beziers = 22,006
- Edinburgh - Bordeaux = 39,961
- Edinburgh - Carcassonne = 3,822
- Edinburgh - Chambéry = 5,728
- Edinburgh - Clermont Ferrand = 2,905
- Edinburgh - Grenoble = 4,836
- Edinburgh - Lyon = 23,870
- Edinburgh - Marseille = 28,911
- Edinburgh - Nantes = 5,157
- Edinburgh - Nice = 57,144
- Edinburgh - Paris Charles de Gaulle = 357,132
- Edinburgh - Paris Orly = 54,849
- Edinburgh - Poitiers = 8,724
- Edinburgh - Toulouse = 7,347
- Glasgow - Bordeaux = 6,716
- Glasgow - Carcassonne = 20,200
- Glasgow - Chambéry = 5,686
- Glasgow - Grenoble = 3,173
- Glasgow - Marseille = 8,709
- Glasgow - Paris Charles de Gaulle = 149,948

2017 Market Share



**904,854 DIRECT PASSENGERS BETWEEN FRANCE AND SCOTLAND**

# 2017 SUMMARY

- Flights between Scotland and France were operated by a mix of UK (easyJet, Jet2 & TUI), and European Airlines (Air France, Ryanair)
- Air France was the only airline to serve all three airports that had service to France - however, they ended their Glasgow - Paris route in October 2017.
- Edinburgh Airport was comfortably the market leader and had significantly more routes and destinations than both AGS owned airports combined.

# 2023 DIRECT FRENCH ROUTES

## Edinburgh Airport

- Beauvais
- Beziers
- Bordeaux
- Carcassonne
- Chambéry
- Grenoble
- Lyon
- Marseille
- Nantes
- Nice
- Nîmes
- Paris CDG
- Paris Orly
- Poitiers
- Toulouse

## Glasgow Airport

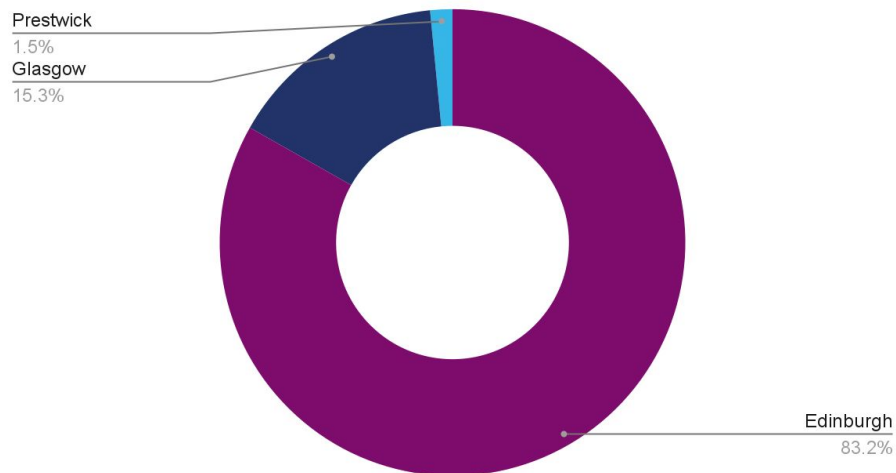
- Bordeaux
- Chambéry
- Paris CDG

## Prestwick Airport

- Marseille

# 2023 PASSENGER NUMBERS

## 2023 Market Share



**1,050,346 DIRECT PASSENGERS BETWEEN FRANCE AND SCOTLAND**

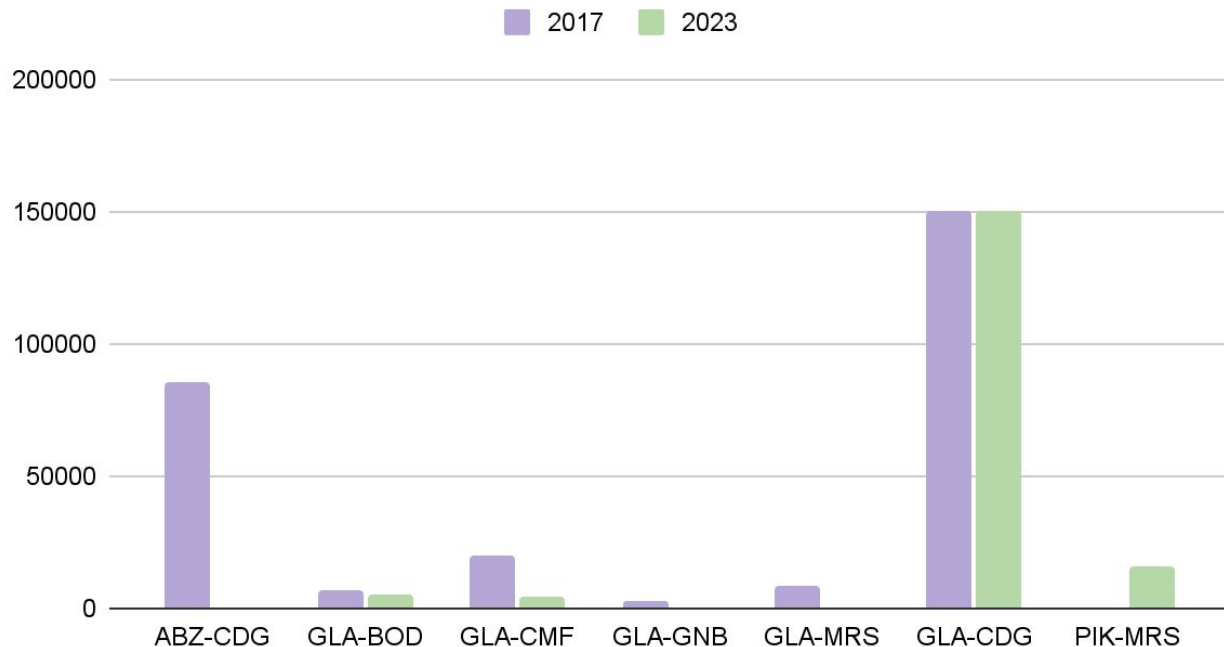
- **Edinburgh - Beauvais** = 78,601
- **Edinburgh - Beziers** = 10,896
- **Edinburgh - Bordeaux** = 38,080
- **Edinburgh - Carcassonne** = 10,901
- **Edinburgh - Chambéry** = 7,073
- **Edinburgh - Grenoble** = 10,787
- **Edinburgh - Lyon** = 27,241
- **Edinburgh - Marseille** = 47,172
- **Edinburgh - Nantes** = 29,797
- **Edinburgh - Nice** = 63,670
- **Edinburgh - Nîmes** = 18,320
- **Edinburgh - Paris Charles de Gaulle** = 438,164
- **Edinburgh - Paris Orly** = 31,582
- **Edinburgh - Poitiers** = 18,746
- **Edinburgh - Tarbes-Lourdes** = 1,769
- **Edinburgh - Toulouse** = 42,824
- **Glasgow - Bordeaux** = 5,599
- **Glasgow - Chambéry** = 4,700
- **Glasgow - Paris Charles de Gaulle** = 150,041
- **Glasgow - Tarbes-Lourdes** = 296
- **Prestwick - Marseille** = 16,152

# 2023 SUMMARY

- Flights between Scotland and France were operated by a mix of UK (easyJet, Jet2 & TUI), and European Airlines (Air France, Ryanair & Transavia)
- Edinburgh Airport had further increased its position as market leader when it comes to French flights.
- Ryanair launched a new PIK-MRS service, then shortly after easyJet dropped their route from GLA, it is possible these two events are linked.

# 2017/2023 COMPARISON (EDI Excluded)

2017/2023 comparison (EDI Excluded)

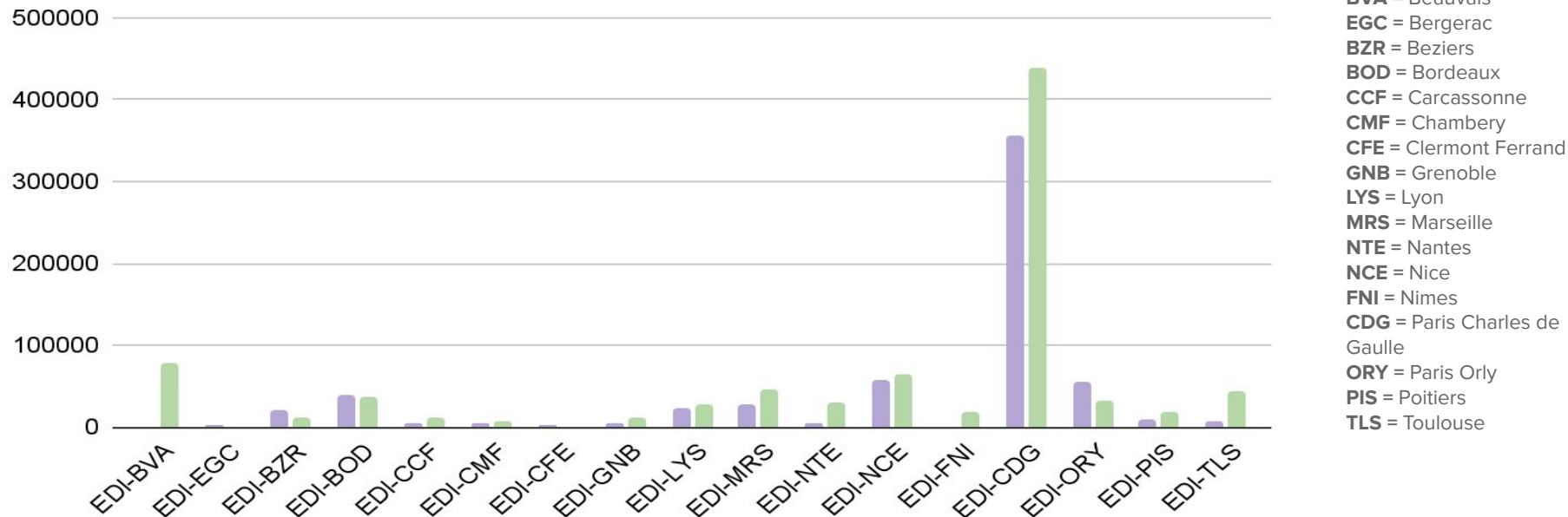


**ABZ** = Aberdeen  
**GLA** = Glasgow  
**PIK** = Prestwick  
**CDG** = Paris CDG  
**BOD** = Bordeaux  
**GMF** = Chambéry  
**GNB** = Grenoble  
**MRS** = Marseille

# 2017/2023 COMPARISON (EDI Only)

## 2017/2023 Comparison (EDI Only)

2017 2023



# 2017/2023 COMPARISON - NOTES

- The following routes that operated in 2017 did not operate in 2023;
  - Aberdeen to Paris CDG
  - Edinburgh to Bergerac
  - Edinburgh to Clermont Ferrand
  - Glasgow to Carcassonne
  - Glasgow to Grenoble
  - Glasgow to Marseille
- The following routes that did not operate in 2017 did operate in 2023;
  - Edinburgh to Beauvais
  - Edinburgh to Nimes
  - Prestwick to Marseille

# LOOKING AT 2024

- **Aberdeen** Airport is working towards securing a route to Paris according to Consultative Committee meeting minutes released in March.
- **Edinburgh** has seen a number of changes for S24, and will see further changes in W24/25
  - Carcassonne was dropped in 2023
  - Bergerac and Biarritz have both been added by Ryanair for S24
  - Nimes was dropped for S24
  - Ryanair will end their Bordeaux service in October and exit BOD completely - French regulators are investigating a number of contracts Ryanair has with airports in France .
- **Glasgow** to Marseille has returned 2x week with easyJet, and the airline has also reintroduced its 3rd weekly Bordeaux flight that was dropped in S23.
- **Prestwick** to Marseille has been dropped by Ryanair, meaning PIK has no service to France in 2024.