Quantifying Film and Television Tourism in England

Report for Creative England in association with VisitEngland by Olsberg•SPI

4th March, 2015

OLSBERG•SPI

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About Creative England

Creative England invests in and supports creative ideas, talent and businesses in film, TV, games and digital media. We aim to grow the brightest, the best, and those with the most promise so that individuals and businesses can achieve their full creative and commercial potential. We help identify future opportunities to grow the economy and generate jobs.

Creative England's Production Services team provides a free film office service to productions filming in England, outside London, to create investment, jobs and profile. Working in partnership with the British Film Commission to promote England internationally, Creative England is the one-stop shop for locations, studios, facilities and crew.

From sourcing locations to negotiating film permissions, our experts connect film and programme makers to the people, places and facilities that make England an amazing place to film. In the last two years we've helped 1,936 productions to film on location in the English regions, bringing over £171 million to local economies and 10,000 days of work for local crews.

In association with VisitEngland – the national tourist board for England.

HEADLINE STUDY FINDINGS

- The primary research undertaken for this project provides clear evidence that tourists will travel to sites specifically because they have been depicted in feature films and television drama.
- 36.1% of all international tourists and 11.6% of all domestic tourists surveyed on site at six locations studied for this project can be defined as core screen tourists – i.e. a screen production was the primary motivator for their visit.
- The value of these visits is significant, with the best-performing sites attracting day-spend value from international visitors of up to £1.6 million annually. Combined with the day-visit value of domestic core screen tourists, the best performing site saw £4.3 million total screen tourism spend annually.
- International core screen tourism is valued in the range of **£100 million-£140 million** for the Rest of England in 2014. This is considered to be a conservative value.
- Different types of productions can induce screen tourism, including period and contemporary stories, family content, sci-fi, and fantasy – and even dark stories. Screen tourism was also detected across a range of locations, including heritage buildings, a town, a village, and a countryside site.
- The top-three performing sites featured iconic locations that were depicted clearly on screen and were central to plot. All three were also featured in film franchises or television series – suggesting that extended on-screen exposure creates the biggest screen tourism impact.
- Interaction with screen tourists suggests that some visitors may be reluctant to admit that a film or television drama had influenced their visit, with a perception that the activity is somehow a lowbrow undertaking. This trend was particularly evident at heritage sites.
- Screen exposure can have a rapid impact on a destination, inducing tourist visits shortly after a film or TV production is released or, in some cases, while it is still in production.
- Screen tourism effects can be long-lasting, depending on the longevity and renown of the production.
- However, screen tourism can also be unpredictable. The success of any film or television drama is not guaranteed, and the effects on inducing visits can be complex.
- Should screen tourism occur, locations should carefully consider how to cater for these tourists alongside an existing tourism offer.
- Given the high levels of feature film and high-end television production in the UK, the screen tourism opportunity is expected to increase in the UK in the coming years.
- The findings prove that the methodology developed for this Study is able to isolate and accurately value core screen tourists at specific locations. Future survey work to assess a wider baseline of visitors would enable a more detailed national value.

1. EXECUTIVE SUMMARY

This section explains the context for this project, outlines key quantitative and qualitative findings, and details the methodology.

1.1. Context for the Study

This Study was funded by Creative England in association with VisitEngland to provide a robust assessment of the value of feature film and television drama tourism ("**screen tourism**") to England outside of London "**the Rest of England**").

Also referred to as film tourism or film-induced tourism, this is a phenomenon in which the depiction of a location on screen subsequently drives tourist visits. Such effects can be powerful for certain locations. Antony House in Cornwall, for example, is reported as having seen visitor numbers rise from 25,000 to almost 100,000 after the success of *Alice in Wonderland* in 2010.[1] Meanwhile, Alnwick Castle in Northumberland, which hosted the first two Harry Potter films among other film and television productions, was reported in 2013 as having experienced a 230% increase in visitors since 2011, bringing in an extra £9 million for the local economy.[2]

Such effects have also been noted – to varying degrees – in locations around the world. This includes the impact of the Swedish *Millennium* films on the Stockholm region and the impact of films such as *Indiana Jones and the Kingdom of the Crystal Skull* on visitors to New Mexico.[3] Visitor increases have even been noted by locations related to a screen product even if they did not feature in the work. For example, the success of the Disney animated film *Frozen* reportedly led to a 37% increase in US visitors to Norway in the first three months of 2014.[4]

Screen tourism has drawn significant media and academic attention in recent years, with a considerable amount of scrutiny given to tourism impacts. These include the positive effects of increased profile and negative effects, such as the pressure that can be placed on infrastructure by a sudden increase in visitors.

The actual value of screen tourism has proved more challenging to quantify, and despite the interest in this field there remains a lack of clarity with regards to the value that screen exposure can create. This relates in part to the clear methodological challenges of measuring tourist motivation in such a highly complex area.

The methodology developed for this project aims to accurately assess the value created by film and television tourism at a number of specific locations in England. The project looks to combine spend data relating to core screen tourists at specific sites with secondary data and a number of detailed, supportable assumptions to estimate a value for screen tourism in the Rest of England.

Providing a new clarity on the value of screen tourism is important for a number of reasons, including the fact that the UK is seeing record production levels. According to the British Film Institute (BFI), £1.47 billion was spent on the production of films in the UK in 2014 – the highest

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[1] *TV, film and radio hits bring visitors to UK attractions*. Association of Leading Visitor Attractions press release. 23rd February 2011.
[2] *Downton Abbey and Harry Potter locations a major drawcard for tourists*. VisitBritain news release. 23rd September 2013.
[3] *The Millennium Report – Economic impact and exposure value for the Stockholm region in the Swedish Millennium feature films*. Cloudberry Communications, April 2011; *The Impact of Film Tourism on the State of New Mexico*. Southwest Planning and Marketing and CRC & Associates, December 2008.
[4] *Disney makes Norway a hot destination*. The Times, 2nd June 2014.

spend on record. Moreover, the extension of creative sector tax reliefs to high-end television in 2013 had an immediate impact with £615 million in spend in the first full year.[5]

For locations, destination marketing organisations (DMOs), and local and regional authorities, these productions do not just bring spend during production but the potential for tourism spending that could continue long after the cameras have been packed away.

The wealth of production in the UK clearly means that audiences around the world will see more of the UK on screen in the coming years. Furthermore, the UK's record production levels are matched by record levels of inbound tourism, with International Passenger Survey (IPS) data showing that 2014 was the strongest year ever with overseas visitors spending £21.7 billion in Britain – up 3% on 2013.[6]

The screen tourism opportunity is clearly expanding, and fostering a greater understanding of the potential value of film and television productions is key to making England and the UK a more film-friendly territory, with benefits for both the screen and tourism sectors.

1.2. A Deeper Understanding of Screen Tourism Effects

This project presents the results of research, consultations and extensive survey work undertaken at eight locations in England where the production of feature film or television drama has taken place. The locations and key associated screen products are outlined in Table 1.

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[5] *New BFI statistics show record year for UK film in 2014.* BFI press release, 3rd February 2014.
[6] *2014 strongest year ever for inbound tourism to Britain.* VisitBritain press release, 12th February, 2015.

Table 1 – Key Screen Productions Included on Surveys at Each Location

Location	**Film**	**TV drama**
Alnwick Castle	*Harry Potter and the Philosopher's Stone* (2001), *Harry Potter and the Chamber of Secrets* (2002)	
Bampton		*Downton Abbey* (2010-present)
Castle Howard	*Brideshead Revisited* (2008 film), *Garfield: a Tale of Two Kitties* (2006)	*Brideshead Revisited* (1981 television series), *Death Comes to Pemberley* (2013)
Holkham	*Shakespeare in Love* (1998), *The Duchess* (2008)	
Lyme Park	*The Awakening* (2011)	*Pride and Prejudice* (1995 television series) *Casanova* (2005), *The Village* (2013-2014)
Puzzlewood	*Jack the Giant Slayer* (2013)	*Atlantis* (2013-present), *Da Vinci's Demons* (2013-present), *Doctor Who* (1963-present), *Merlin* (2008-2012)
West Bay		*Broadchurch* (2013-present)
Wollaton Hall	*The Dark Knight Rises* (2012)	

Note: The key screen productions referred to above are those named on the surveys as being most likely to be of relevance to current screen tourists. Some sites have hosted further productions.

The primary results of this project are a robust annual valuation for each site and an estimate of the national value of core screen tourism. In addition, a range of key insights into screen tourism that were identified during the surveys and research are presented.

This Study aims to accurately assess the day-spend value of tourists visiting locations that have featured in film and television dramas. As outlined in Section 4.8, spend data from official tourism surveys was utilised to assign value to different types of tourists – namely the IPS, the Great Britain Day Visits Survey and the Great Britain Tourism Survey.

By focusing on visits that would not have occurred without a screen experience it therefore presents a robust valuation of the effects of screen exposure. Though film and television links can have different levels of impact on tourist motivation only visits specifically induced by a screen product have been valued.

In addition to valuing screen tourism, this project should assist readers, including locations, DMOs and other authorities understand how to better assess and maximise potential screen tourism opportunities, as well as highlighting potentially problematic factors related to the phenomenon. A predictive model, as outlined in Section 3, aims to provide insight into the range of factors that may point to a production being able to induce tourism, and the type of value that may be created, so that locations and authorities can better evaluate the potential of projects.

It is clear that the screen tourism opportunity is relevant across the Rest of England, since production is taking place all over the country. While many shoots are centred around London, particularly high-budget features, projects also utilise the breadth of locations for which England is renowned – including countryside, coastal landscapes, historic buildings and urban architecture.

A number of projects, particularly in high-end television, are opting to base their productions largely or entirely outside of London. This includes major shows such as *Wolf Hall* and *Galavant* that were filmed in the South West of England.[7]

With locations around England in demand, screen exposure could also assist in driving tourists to the English regions. Impactful exposure in a feature or television drama can be a very powerful spotlight for a destination, highlighting its desirability as a place to visit. Presently, London claims a higher share of all international tourist spend to the UK than the Rest of England. According to a 2013 study by Deloitte/Oxford Economics, London claimed 53% of international tourism spend, with the Rest of England receiving 35%. The remaining 12% was spent in Scotland, Wales and Northern Ireland. [8]

1.3. The Economic Importance of Tourism

Tourism is highly important to the UK. As Prime Minister David Cameron commented in 2010, tourism is "fundamental to the rebuilding and rebalancing of our economy".[9]

Data collated by Olsberg•SPI from official tourism surveys show that total tourism spend stood at £98bn in the UK in 2013, with the Rest of England excluding London worth £59.8bn. According to Deloitte/Oxford Economics the overall tourism economy contributed £126.9bn – or 9% – of UK GDP in 2013 and was also found to account for 9.6% of total UK jobs. As previously noted, the UK saw record levels of inbound tourism in 2014.

Table 2 – Value of Tourism to the UK, London and England outside of London, 2013 (£ billions)

Survey	UK	London	Rest of England exc. London
Overseas Visitors to the UK	20.8	11.3	7.1
Domestic Overnight Tourism (GBTS)	23.3	2.8	15.9
Day Visits (GBDVS)*	53.9	9.2	36.8
Total	98	23.3	59.8

Source: VisitBritain / ONS / IPS. Note: Data from all visits used. GBTS and DVS data collated from VisitEngland's Online Data Browser. Day Visits survey figures based on tourism day visits.

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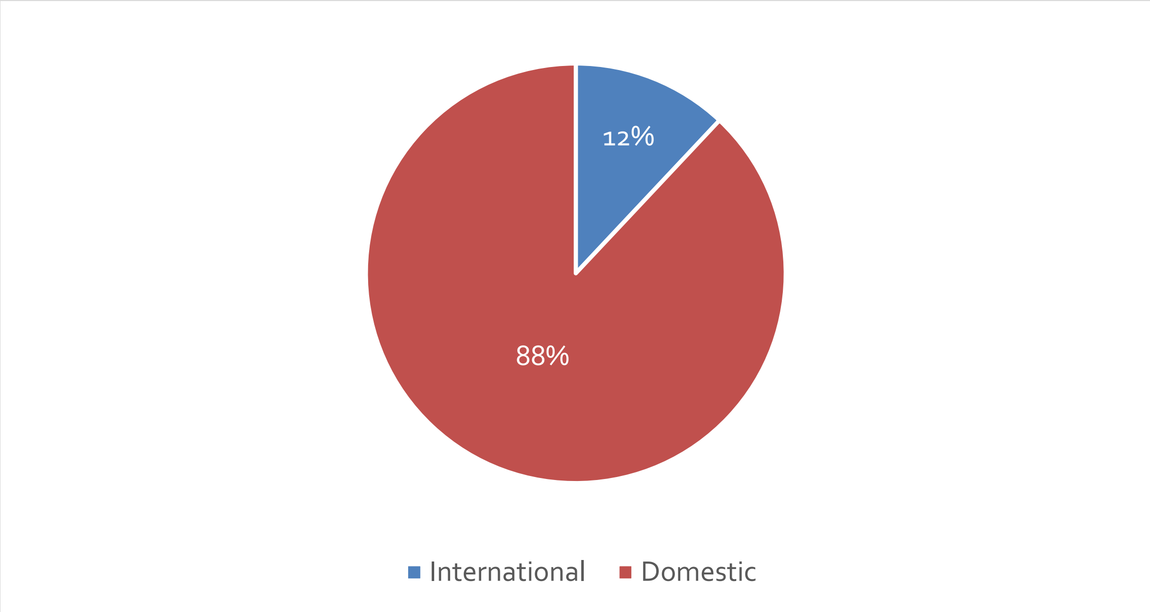
[7] Other recent major productions have been based in Scotland (*Outlander*), Wales (*Da Vinci's Demons*) and Northern Ireland (*Game of Thrones)*.

[8] *Tourism: jobs and growth. The economic contribution of the tourism economy in the UK.* Deloitte, Oxford Economics. November 2013

[9] David Cameron speech on tourism, 12th August, 2010.

For the Rest of England, data from Deloitte/Oxford Economics show that domestic tourists contribute the majority of spend.

Figure 1 – Overall Tourist Spending Breakdown, Rest of England



Source: Deloitte/Oxford Economics

1.4. International and Domestic Visitors

Tourists can be categorised in a number of ways – including whether they are domestic or international visitors. While the research and survey process for this Study assessed both types of visitor, the core findings relating to the value of screen tourism focus only on inbound spend. Where relevant, findings related to domestic tourists are also included.

This approach has been taken because international screen tourists, of the type this project sought to isolate, are a priority for Government and other agencies. International tourists bring additional spend into the UK, and in the case of core screen tourists this spend can be directly attributable to film and television productions.

This can highlight the role that screen exposure has in attracting specific visits – such exposure is particularly important given that the UK, as a tourist market, operates in a highly competitive international landscape. Understanding how screen products can act as a primary driver, and serve to differentiate the UK from other markets, is vital. And while this report focuses on the value of core screen tourists it should also be noted that screen tourism can also contribute to tourist visits at a less direct level, also acting as a window to promote other key tourist draws of the UK, such as its heritage, landscapes and culture.

The focus on international visitors also reflects the importance of 'soft power', or 'cultural diplomacy' – the understanding of the effects that UK culture has on its standing in the world. As noted in a recent British Council report on culture, attraction and soft power: "In a multipolar, hyperconnected world, a country's power is increasingly measured by its ability to inspire and attract citizens of other nations to take an interest in its national story, enjoy its passions, and ultimately respect its values, ideas and aspirations".[10]

Film and television productions are of course key products in which the values and attractions of the UK can be communicated internationally.

1.5. Key Findings

There is strong evidence from the surveys that experiencing a destination on screen can be a powerful inducement to visit as a tourist, with all eight attracting international or domestic visitors who said they would not have travelled there if they had not seen the associated film or television drama.

This section outlines the proportion of core screen tourists, their value, and other findings.

1.5.1. Proportion of core screen tourists

There were a total of 1,006 individual respondents to the site and online surveys, representing a direct total combined group size of 3,043 visitors.

Analysis was undertaken into the proportion of core screen tourists within the individual and group samples, and the results are presented below. As outlined in Section 4, the methodology for calculating both the proportion and value of core screen tourists involved counting tourists who said they would not have visited without having seen the screen product at 100%, and tourists who said they would have visited anyway but pointed to the screen link as the main reason at 50%. Six of the eight sites had visitors who were only counted at 50% in the proportion numbers outlined in this section and therefore would have attracted higher core numbers than were actually counted.

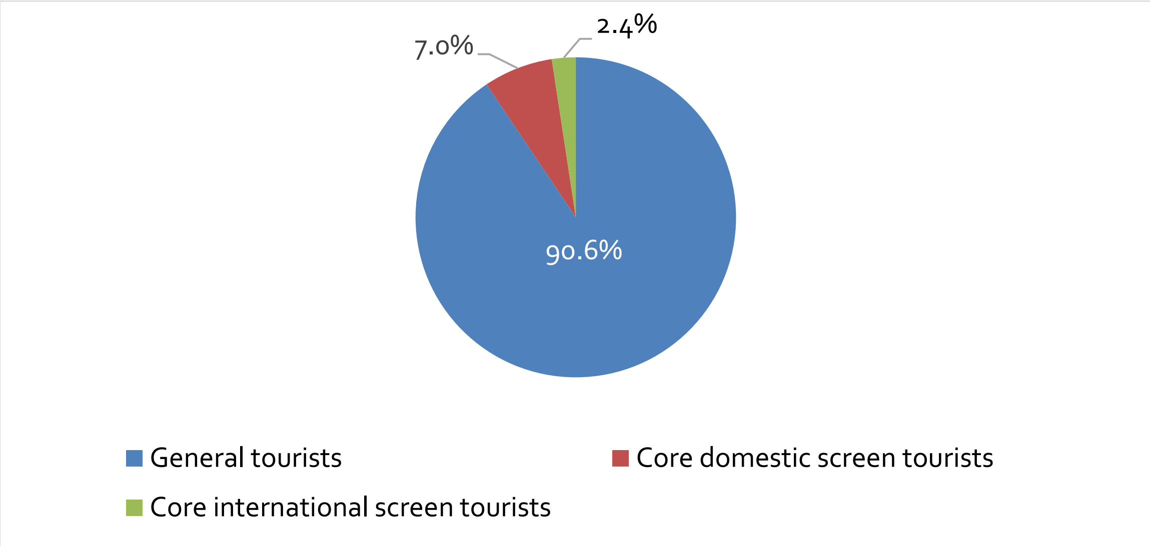
It should also be noted that the proportions outlined in this section relate to a combination of site and online survey results – i.e. the full survey sample. Elsewhere in this Study only site data was used for proportion and valuation purposes, since site data could be directly applied to other data relating to the survey day or year.

[10] *As Others See Us*. British Council, 2014.

Individual Responses

Within the individual sample 94 out of 1,006 visitors (9.3%) were identified as core screen tourists across the eight sites.[11] Of these, 7% (70) were domestic core screen tourists and 2.4% (24) were international.

Figure 2 – Core Domestic and International Screen Tourists as a Proportion of Individual Survey Sample



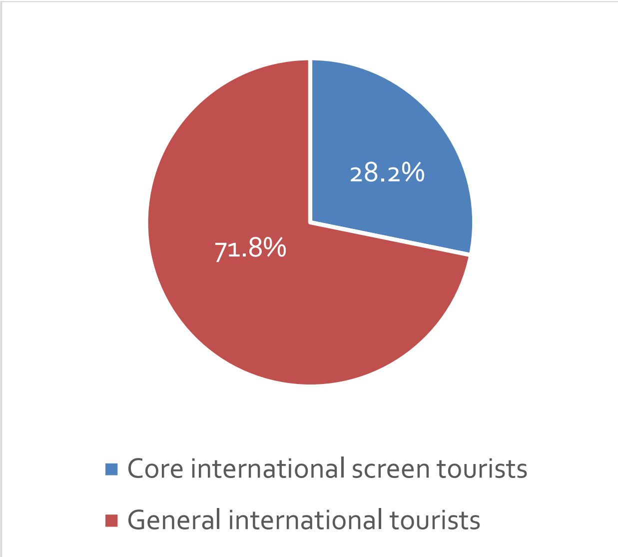
Note: chart based on individual responses.

While core domestic screen tourists represented a larger proportion of the overall respondent sample, this reflects the fact that significantly more domestic tourists were identified: from a total sample of 1,006 individual respondents 85 were international and 921 domestic.

Assessing the proportion of individual screen tourists within the international and domestic categories demonstrates that screen tourism was a much greater motivator for international visitors than for domestic visitors. Of 85 international visitors 24 – or 28.2% – were core screen tourists. Of 921 domestic visitors 70 – or 7.6% – were core screen tourists.[12]

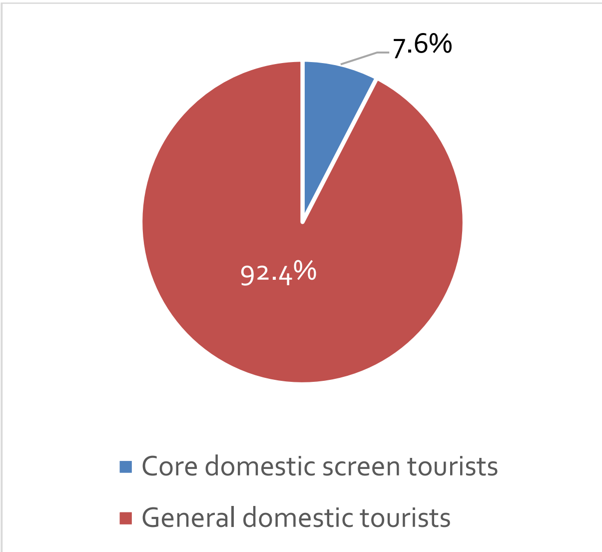
[11] There were 104 individual core screen tourists before the 50% reduction was applied to those who said they said they would have visited anyway but pointed to the screen link as the main reason.
[12] Having applied a 50% reduction to some visitors a figure of 69.5 domestic core screen tourists was obtained. This has been rounded up to 70.

Figure 3 – Core International Screen Tourists as a Proportion of all Individual International Respondents



Note: chart based on individual respondents.

Figure 4 – Core Domestic Screen Tourists as a Proportion of all Individual Domestic Respondents

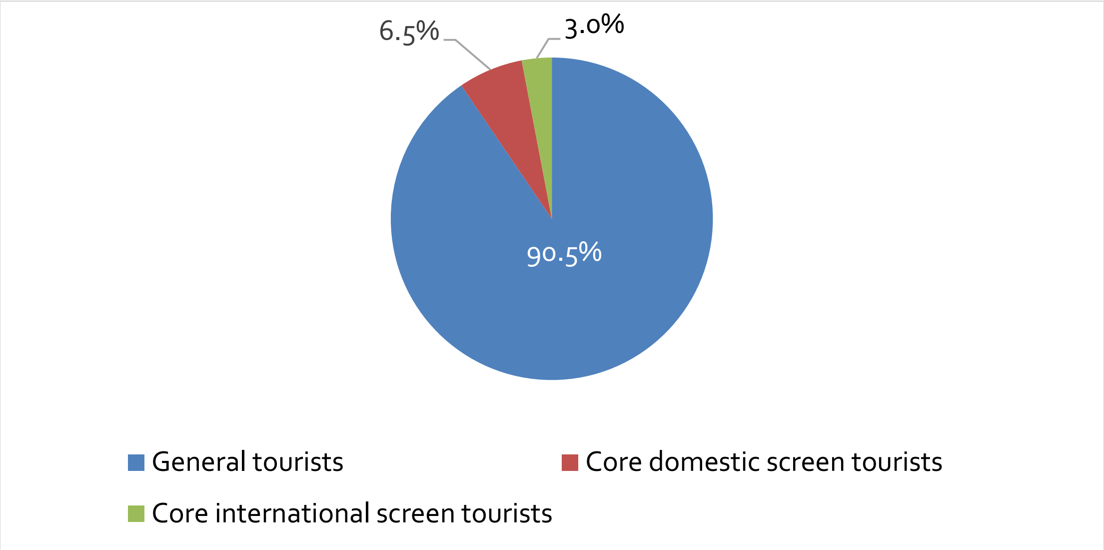


Note: chart based on individual respondents.

Group Responses

Within the group sample 288 out of 3,043 visitors (9.5%) were identified as core screen tourists across the eight sites.[13] Of these, 6.5% (198) were domestic and 3% (90) were international core screen tourists.

Figure 5 – Core Domestic and International Screen Tourists as a Proportion of Overall Group Survey Sample



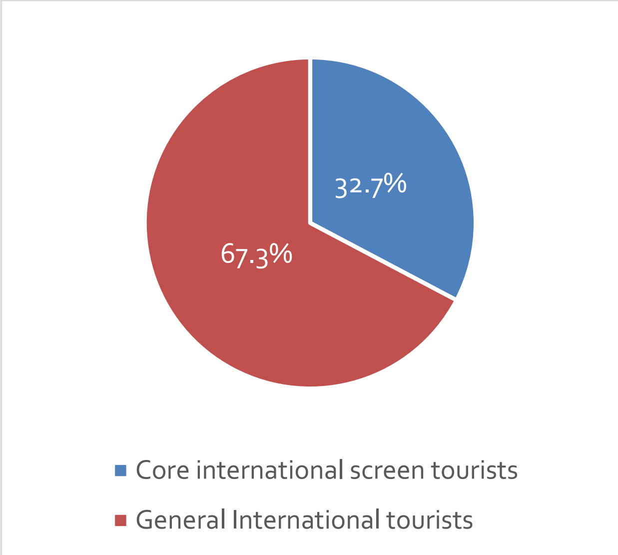
Note: chart based on group size.

While core domestic screen tourists represented a larger proportion of the overall respondent sample, this reflects the fact that significantly more domestic tourists were identified: from a total sample of 3,043 respondents 275 were international and 2,768 domestic.

Assessing the proportion of screen tourists within the international and domestic categories demonstrates that screen tourism was a much greater motivator for international visitors than for domestic visitors. Of 275 international visitors 90 – or 32.7% – were core screen tourists. Of 2,768 domestic visitors 198 – or 7.2% – were core screen tourists.

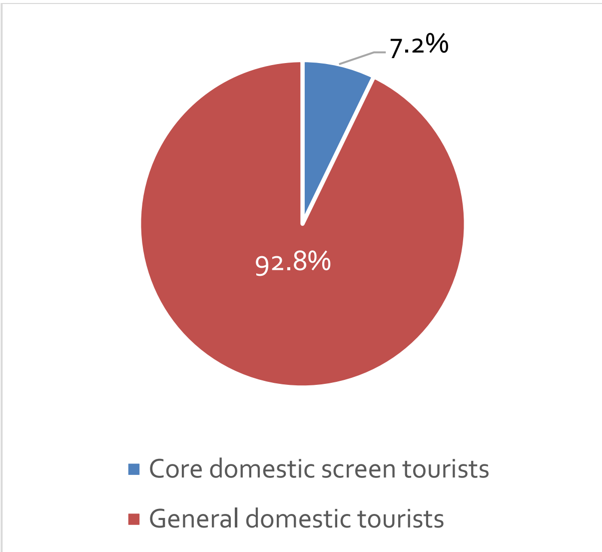
[13] There were 328 core screen tourists in the group sample before the 50% reduction was applied to those who said they said they would have visited anyway but pointed to the screen link as the main reason.

Figure 6 – Core International Screen Tourists as a Proportion of all International Group Respondents



Note: chart based on group size.

Figure 7 – Core Domestic Screen Tourists as a Proportion of all Domestic Group Respondents



Note: chart based on group size.

The volume of core tourists at individual sites is outlined in Section 5.

1.5.2. The value of screen tourism

The value of tourism at the sites was assessed using the proportion of core international screen tourists identified during the on-site surveys. For two sites at which no in-person surveys were undertaken online results were used.

Overall, four of the eight sites attracted core international screen tourists on the survey days, with their value ranging from £0.2 million to £1.6 million annually. No international core screen tourists were identified at four of the sites. The value of international tourism at each of the sites is outlined in Table 3.

Table 3 – Value of International Core Screen Tourism at Survey Sites

Location	Value (£m)
Alnwick Castle	1.2
Bampton	1.6
Castle Howard	0
Holkham	0
Lyme Park	0.3
Puzzlewood	0
West Bay	0.2
Wollaton Hall	0

Note: Values calculated from overall group size.

The findings from these sites were then used to scale-up to an overall value of core screen tourism spend for the Rest of England. To estimate this, a two-step Scaling-Up Method was utilised. Firstly, the value of the eight sites were individually applied to 100 further locations based on assumptions relating to similarity of the associated content or location, or popularity of the screen product. It is clear that there are many more such locations in the Rest of England but with a lack of data on the exact amount a number of movie maps were analysed for relevant locations in the Rest of England. With further assumptions to include film or television produced in years not covered by the movie maps it is estimated that there are 250 dual-appeal locations. The average value per site in the 100-location group was used to determine the overall value for the 250 locations.[14]

Scaling up the survey findings resulted in an estimated annual day-spend value of core international screen tourism at locations in the Rest of England in the range of £100 million-£140 million in 2014.

The value range outlined for the Rest of England is considered to be conservative for a number of reasons:

- The valuation methodology only focuses on international tourists, since these are considered to be of particular interest. However, the level of domestic screen tourists was generally higher than international tourists at most survey sites. (Findings related to domestic tourists that were generated by this project are presented and discussed throughout this report, both in terms of the overall sample of respondents and related to individual survey sites, but do not form part of the core value calculation.)
- The project only measures day spend, even though a core screen tourist's entire trip may have been motivated solely by a film or television production.
- Only screen tourists who would not have travelled to a destination without having seen an associated film or television programme were valued, along with 50% of those who

[14] The methodology is outlined in detail in Section 4.9.1.

said they would have visited but the screen link was the main reason. While other screen tourists were identified with lesser levels of motivation they were not valued.
- The value does not reflect the latent effects of screen content – those visitors whose interest in a place may have been indirectly or unknowingly stimulated by viewing it on screen.
- The methodology only focuses on locations that can attract general and screen tourists. It does not include the value of locations or events dedicated primarily to core screen tourism since analysis of these would not provide an indication of additional spend drawn to an existing tourist location by a screen product. Therefore the value of attractions like the Warner Bros. Studio Tour – The Making of Harry Potter and the Shaun the Sheep Experience at Land's End, and events such as those organised by Secret Cinema, have not been included.
- The project only focuses on feature film and television drama. Widening the focus to include other types of screen tourism – such as food or travel shows – would have likely resulted in a higher valuation.
- Several of the eight locations attracted relatively low visitors numbers, and no scaling up was applied to reflect higher visitor numbers at other screen tourist sites.
- The Study does not measure screen tourists who might visit locations associated with a film or TV show at which filming did not take place.
- Tourists travelling to a location where filming is underway are not included.

This project has created and tested a methodology for valuing core screen tourists at locations. It was only possible to undertake primary data gathering at eight sites for this Study but further work using this methodology – including a survey at national level – would expand the sample base and reduce the assumptions necessary in scaling up.

Since this Study assesses day spend at dual-appeal locations it is difficult to compare findings with other valuation in the public domain. For example, according to Oxford Economics, screen products depicting the UK are responsible for around a tenth of overseas tourism revenues. However, this is assuming the influence of film on all visitors to the UK rather than core screen tourists undertaking day visits to dual-appeal locations.[15] Meanwhile, IPS data from 2006 shows that 3% of holiday visits to the UK involved a visit to literary, music, TV or film locations at some point, accounting for 4% of total spend on holiday visits. It is unclear, however, how much of this can be directly attributed to film and television locations.

1.5.3. Screen tourism as a driver for visitors

The eight sites demonstrate a range of screen tourism impacts. Considering these impacts alongside the underlying screen content at each site and insight gained from interacting with visitors results in a number of key findings:

- Naturally, popular and long-running productions drew the highest proportion of core screen tourists, including the Harry Potter film franchise and *Downton Abbey*.
- Period drama proved to be a strong draw – but productions associated with other genres also attracted visitors. This includes family fare, fantasy and sci-fi. Productions with darker themes were also able to attract screen tourists.
- Several of the top-performing sites featured clearly recognisable – even iconic – locations such as Castle Howard, which featured in *Brideshead Revisited* and Alnwick

[15] *The Economic Impact of the UK Film Industry.* Oxford Economics, September 2012.

Castle, which had featured as Hogwarts School of Witchcraft and Wizardry in the first two Harry Potter films.

- Other sites attracted high levels of screen tourism with a number of locations. West Bay and Bampton, for example, both included a number of buildings and locations that had been featured on screen in *Broadchurch* and *Downton Abbey*.
- Heritage buildings proved to be popular, particularly if they had been showcased prominently on screen.
- Natural landscapes also drive screen tourists. A number of respondents singled out the cliffs at West Bay, which had been featured prominently in *Broadchurch*, as a particular attraction.
- Locations do not necessarily have to 'play' themselves on screen to attract visitors. Alnwick, Bampton, Castle Howard, Lyme Park and West Bay were all 'actors' – and all attracted screen tourists despite doubling for other places.
- However, the low proportion of screen tourists detected at Wollaton would suggest that a site is more able to attract visitors if the location it is doubling is similar to that in which the location is situated. Wollaton Hall – featured as Wayne Manor in the US-set *The Dark Knight Rises* – is an example of this.
- This may have also been a factor at Holkham, at which no international screen tourists were detected. A key production at this destination was *Shakespeare in Love*, which doubled Holkham Beach for the US.
- Destinations not connected to their locale on screen would appear to be less of an issue for sci-fi and fantasy projects, and projects with cult appeal. Puzzlewood, for example, attracted visitors despite not directly playing itself.
- Popular locations also tended to be within regions or locales that have underlying appeal to international visitors. Where a destination exists within a region of interest to tourists, screen content can serve as a compelling additional reason to visit. For example, several visitors to Bampton explained that they had been interested in seeing the Cotswolds, and the village's links to *Downton Abbey* meant they chose Bampton, rather than an alternative Cotswolds location, as the focal point of their trip.
- Some screen tourists do not even need to have seen a film or television drama before travelling there. Some respondents were drawn to Puzzlewood by *Star Wars: Episode VII – The Force Awakens*, while the film was still in production.[16] Screen tourism effects can be seen very rapidly. Some survey respondents had travelled to locations very shortly after a television show was broadcast.
- The age of the associated screen product is not necessarily a barrier.[17] With digital distribution, the life of productions – and therefore their potential to induce tourism – can be open-ended. This was the case at Castle Howard, which was found to be attracting screen tourists for the series of *Brideshead Revisited* – initially broadcast more than 30 years earlier.

1.5.4. *Maximising screen tourism*

While some survey sites had responded to screen tourism – whether through location trail leaflets, or specific products aimed at the screen tourist market – it was clear that maximisation should be carefully considered by those locations that see an upturn in such tourism. This is

[16] *Star Wars: Episode VII – The Force Awakens* was not given as an option on the surveys, but was added by these respondents to the 'other' category. Although Puzzlewood will not confirm or deny a *Star Wars* link, media stories have pointed to the film having been produced there – which explains the interest from tourists.

[17] Further assessment of the longitudinal effects of content on tourism is recommended.

relevant both in terms of improving the information available and monetising the presence of screen tourists.

It was evident during the surveys that there was often an information gap, with surveyors frequently asked by screen tourists to point out relevant sites. While visitors may know the screen product very well the physical geography of a location can sometimes bear limited resemblance to the fictional geography seen by viewers on screen.

Enabling screen tourists to navigate a destination should be a priority for locations. Tour guides might provide such information, or else printed maps or trails could be made available. Digital distribution of maps, guides or audio information is of course possible. Close links between tourism agencies and screen agencies is one way of producing and distributing high quality information that can cover both the production and the location.

It was clear that locations should also consider how to monetise any upturn in screen tourism. While some locations had responded to the opportunity with relevant film or television-related activities for screen tourists, there was less in place at other sites.

Some visitors to Bampton, for example, noted the lack of opportunity to spend. As one respondent commented: "Please provide a tea shop". However, with key locations in a residential area, it would not necessarily be desirable to install souvenir shops or other related services. (The Bampton Archive, which does stock some souvenirs and a location map, did open during the survey day).

However, strategies for maximising the impact of screen tourism need to be carefully considered. Destinations can be sensitive, particularly if they are experiencing an influx of screen tourists for the first time, or if they appeal to other types of tourists who may have no interest in the screen production.

1.6. A Predictive Model

Screen exposure can have a transformative effect on a tourism destination, but expectations should be managed since not every production will successfully attract audiences or result in an upturn of visitors.

There is a considerable element of unpredictability inherent in the production of film and television drama. Nevertheless it is possible to draw out common themes among productions that have resulted in a screen tourism impact. While indicative, these will enable locations to better assess the potential of shooting requests. Key factors include:

- Successful film franchises or television series that have had prior success, with an existing audience base.
- Adaptations of literary works with pre-existing visibility among potential viewers, whether classics or modern works.
- Projects that feature the location in a high-profile, visually-impactful way.
- A location's connection with story, whether as the backdrop for key plot points or dramatic elements. It is this link, rather than the simple attractiveness of a location, that can attract screen tourists.
- A setting or story that intersects with other key strengths of the UK's general tourism offer, including cultural heritage, built heritage, contemporary culture and countryside.

- Projects that have some positive appeal. While *Broadchurch*, the story of a child's murder, demonstrates that dark stories are no barrier it is noted that the series did have positive appeal for viewers in its human story and depiction of a close-knit community.
- The presence of high-profile stars in a production is not essential for generating screen tourism, but can certainly help with audience visibility – and is therefore a pointer to tourism potential.
- The presence of a major production company, financier, or distributor. This points to the likelihood that the project has been well developed, will be produced with quality and have access to key international distribution channels.

1.7. Methodology

1.7.1. Overview

Despite the volume of research into screen tourism the sector is notable for the lack of a robust, economic valuation of the phenomenon. The methodology developed for this Study provides a way of defining the value created by specific film and tourism visitors at specific locations, and a way of using these findings to estimate a value for a larger region – in this case the Rest of England. There are two key areas of the methodology:

- The use of surveys to measure core screen tourists at an individual level at specific locations, providing a highly accurate valuation to support screen tourism claims.
- The scaling-up of specific site data to estimate the value of screen tourism to similar locations in the Rest of England.

Given that this process is based on findings from eight locations, it was necessary to make a number of informed assumptions in moving from detailed individual valuations to a Rest of England figure. These assumptions are explained in detail in Section 2.1.6 but in this respect the second part of the project's methodology should be considered a pilot approach. Clearly with a far larger survey programme, a more accurate – and quite possibly higher – national value would be created and we hope the methodology provides a base for future research in this regard.

1.7.2. Key steps – site valuations

To value screen tourism, this project isolates core screen tourists – i.e. those visitors who would not have gone to a destination without having seen the associated film or television drama, or for whom the screen product was the main reason for their visit. By not valuing screen tourists for whom the screen product was a lesser part of their motivation, the project is able to conservatively depict the additional spend that specific screen tourism can create.

To isolate such tourists, it was necessary to assess dual-appeal locations: those destinations that can attract both general tourists and core screen tourists. The choice of such locations also enables the study of the proportion of core screen tourists within a general visitor population.

Eight locations across England were carefully selected according to a number of criteria, including that they represented a wide range of destination types, such as paid and free attractions and towns and villages; that they represented different types of screen products and genres; and that they represented different English regions. These are outlined in Figure 8.

Surveys were undertaken onsite at six sites and online for all sites, gathering a range of data – including on the level of motivation that associated screen products played in a tourist's decision to visit, where the visitor had come from and how big their immediate group size was.

The resulting data was processed using bespoke data modelling created for this project. To assess value, the proportion of core screen tourists on the survey day was isolated and this proportion was applied to an annual visitor figure supplied, in most cases, by the destinations.[18]

An official day-spend figure was then applied to the annual number of screen tourists, with different values depending on the type of tourist.

1.7.3. Key steps – Rest of England valuation

To estimate a value for screen tourism in the Rest of England the Scaling-Up Method was utilised. Given the lack of hard data about the number of dual-appeal tourist locations in England, and the overall visitor numbers, it was necessary to make a number of informed assumptions to scale up to an estimated value for the Rest of England.

The value of international core screen tourism at each of the survey sites was then applied to a further 92 sites, chosen because they represented a range in accordance with the eight survey sites, rather than simply assessing the most popular screen tourism sites. This was a detailed process that saw value assigned based on a number of factors including whether sites had hosted the same productions, the similarity of productions and locations, and the profile of the productions that had used the location.

Further research was undertaken into the amount of likely screen tourism locations in the Rest of England. Analysis of detailed movie maps led to an estimate of 250 dual-appeal locations in total. The full methodology is outlined in Section 4.

[18] At some sites visitor numbers were not available, and were estimated.

Figure 8 – Map of Survey Locations in the Rest of England

1.8. Conclusions and Recommendations

Hosting the production of a film or television drama can lead to a significant subsequent uplift in visits, and seeing real-life film locations can be a primary reason for tourists to travel. Of eight sites surveyed for this project, core screen tourists were identified at all to varying degrees. At some, the volume of core screen tourists was very significant. With high levels of screen production and inbound tourism, the screen tourism opportunity in the UK is increasing.

Screen tourism can span all types of tourists, including domestic and international, and can be induced by all types of content. Some tourists will even travel to a location before the screen product in question has been released, while shows with enduring appeal continue to generate significant levels of screen tourism long after they were originally broadcast.

Sites with the highest appeal in the survey group were home to iconic locations that featured very prominently in the related screen productions, and played host to key dramatic moments. Such locations can be buildings or landscapes. Stronger tourism effects are also evident from productions that are part of a series, with more screen time and protracted viewing opportunities. Doubling as a fictional place is no barrier to generating screen tourism, but there is evidence that locations have more of a tourism impact if they feature on screen as being in England. Sites that doubled for the US performed less strongly – although sites appearing as fantasy or sci-fi locations performed well.

The needs of screen tourists should be considered by locations, with an information gap apparent at several locations. Given the disparity between screen portrayal and real life it can sometimes be difficult for visitors to navigate sites, particularly if the geography of an actual location differs significantly to its on-screen depiction. Providing screen tourists with useful, insightful material is key in this regard. Similarly, locations with an upturn in screen tourism should carefully consider how to maximise spending and their wider screen tourism offer in a way that does not dilute the authenticity of the site.

While screen tourism can provide a real opportunity for locations, a number of potentially negative factors should also be considered by locations and DMOs. The success of any film or television show is far from guaranteed at the time the production will be shooting, while if successful the volume of tourists may be unpredictable. This is a consideration for sites with limited infrastructure, or with a pre-existing tourist offer that needs to be managed carefully alongside the new film or TV-related offer.

Closer links between screen and tourist agencies would be beneficial to make the most of the opportunity going forward. This has been happening already, with the link struck between Creative England and VisitEngland, and partnerships relating to individual projects or characters such as VisitBritain and StudioCanal on *Paddington* and VisitEngland's campaign starring Shaun the Sheep.

Further research in a number of areas is recommended. Using this project's methodology larger-scale surveys – including at national level – would enable a clearer valuation. Further assessment of the differences between types of screen tourist motivation and behaviour – such as horror fans and period drama fans – would be helpful.

One area of research that is lacking is the understanding of screen tourism 'tail-off': how visitor numbers reduce after initial impact. Research into this would be revealing, and help locations and DMOs plan strategies to boost ongoing interest.

Finally, exploring where the screen tourism sector fits within other forms of cultural tourism would enrich understanding of the UK as a global cultural hub for international visitors.

1.9. Literature Review

Screen tourism is well evidenced as a phenomenon, having been the subject of an extensive amount of study in recent years. For this project the authors undertook a review of academic literature on screen tourism, as well as relevant news stories and releases. It also assessed studies and reports from relevant sectors, such as music tourism, and other material, including guidance on tourism survey creation. A full bibliography is included in Appendix Two.

Rather than provide an overview of all current screen tourism literature – which has been the objective of other papers – this section provides an outline of some key trends and underlying concepts relevant to this project.

Film tourism – Evolution, progress and prospects provides a comprehensive overview of the literature, and points to screen tourism as an area of cross-disciplinary study with research broadly following two discourses:

- An "applied approach" within a "practical context that focuses on "activity and outcomes and an understanding of the phenomenon primarily from a management perspective".
- A "conceptual and/or theoretical focus, where studies set out to explore the underlying constructs that stimulate, contribute to and explain film tourism activity, meaning, behaviour and responses." [19]

In the former categories, a number of studies have sought to measure the volume – and, in some cases, value – of screen tourists. This includes specific locations such as New Mexico, Stockholm, and Florida.[20] Other studies, such as *The Economic Impact of the UK Film Industry* by Oxford Economics have sought to assign an overall value to all visits influenced by film.

A number of projects have used survey methods to measure screen tourism. A project undertaken in New Mexico found that 3.2% of email respondents and 10.3% of respondents at Visitor Information Centres said that awareness of New Mexico films had a great influence on their decision to visit.[21] A project on *Notting Hill* found that around 5% of respondents stated that seeing the film induced them to visit the area.[22] In 2006, IPS data showed that 3% of holiday visits to the UK involved visiting literary, music, TV, and film locations at some point during the trip, while VisitScotland research found that 6% of respondents said they had been inspired by a film and had gone on to visit the destination or the film location featured.[23][24]

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[19] *Film tourism – Evolution, progress and prospects*. Joanne Connell, Tourism Management 33, 2012.
[20] *The Impact of Film Tourism on the State of New Mexico*. Ibid; *The Millennium Report. Economic impact and exposure value for the Stockholm region in the Swedish Millennium feature films*. Ibid; *Economic and Social Impacts of the Florida Film and Entertainment Industry Financial Incentive Program. Preliminary Report Prepared for the Motion Picture Association of America.* MNP, March 2013; *The Economic Impact of Dolphin Tale on the St. Petersburg / Clearwater local economy*. The University of South Florida St. Petersburg College of Business in collaboration with Clearwater Marine Aquarium, August 2012.
[21] *The Impact of Film Tourism on the State of New Mexico.* Ibid.
[22] *Movie-induced tourism: The challenge of measurement and other issues.* Ibid.
[23] *Inbound tourism to Britain's nations and regions.* VisitBritain, September 2013; *UK Consumer Attitudes. Film Related Topics.* VisitScotland, 2012.
[24] Due to differences in methodologies and definitions, findings are not directly comparable with this Study.

Some projects have assessed location placement, or exposure value. This approach assumes a marketing value of screen exposure and seeks to apply a value, in a similar way to 'product' placement.[25]

Other work has sought to define different types of screen tourists and motivation, such as Macionis' description of three types of film tourists – serendipitous, general, and specific.[26] Others have explored the fact that films are not always shot in the places they are portraying, and the implications of this on screen tourism.[27]

The literature review also considered previous work undertaken on sites studies for this project. For example, a 2014 study had assessed the impact of *Broadchurch* on businesses in West Bay and the surrounding area.[28] This was helpful in its presentation of the effect of screen exposure on the profile of the town, and presented the perception of business owners and managers.

The sustainability of tourism has also been assessed, including the potentially displacing effects that screen tourism might have on the profile of an existing tourist destination.[29]

Some studies also explore what screen tourists do when they visit locations with one project underlining the overlap between film and tourism activities: "Both film and tourism are basically industries that offer an opportunity to relive or experience, see and learn novelties through entertainment and pleasure."[30]

This review also pointed to a number of pertinent trends in tourism generally. For example, VisitBritain's *Overseas Visitors to Britain. Understanding Trends, Attitudes and Characteristics*, pointed to relevant trends including the fact that tourists are increasingly demanding authentic experiences, and the fact that "many inbound visitors are not aware how easily, affordably, or quickly, they can travel around Britain". Among other trends, it also points to the potential for a greater percentage of older travellers in the future, which is interesting when considering content type in the context of screen tourism.

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[25] Examples of this include *The Millennium Report*, ibid; and *Quantifying Location Placement Value*, Human Digital, 2015.
[26] Referenced in *Film tourism – Evolution, progress and prospects*. Ibid.
[27] For example, *Displacement Theory – Probing New Ground in Film-Induced Tourism*. Dr. Peter Bolan, Prof. Stephen Boyd & Prof. Jim Bell, University of Ulster, 2010.
[28] *The Impact of Broadchurch on Tourism Businesses in West Dorset April-October 2013*. A report prepared for West Dorset and Weymouth & Portland Shared Services Partnership. Joanne Connell, January 2014.
[29] *What's The Story in Balamory? The Impacts of a Children's TV Programme on Small Tourism Enterprises on the Isle of Mull, Scotland*. Joanne Connell, Journal of Sustainable Tourism, Vol 13, issue 3, 2005.
[30] *Movie-induced Tourism: A New Tourism Phenomenon*. Mijalce Gjorgievski and Sinolicka Melles Trpkova. UTMS Journal of Economics, February 27, 2011.

1.10. Glossary

This document uses a number of words or phrases that may need further explanation.

Screen Tourism

The act of visiting locations that have been first experienced on screen. Also known as film tourism, or film-induced tourism. Since this Study is concerned with both film and television drama the definition screen tourism has been used.

Core Screen Tourists

This term refers to tourists who travel to a destination only because they have experienced it on screen, or it has links to film or television. The value presented in this Study relates only to core screen tourists.

Dual-Appeal Locations

These are sites that are likely to attract both screen tourists and general tourists. Such sites were studied so that the proportion of screen tourists can be analysed within a larger general visitor population.

General Tourists

These are tourists for whom a film or television drama did not play a central part in their decision to visit a location. While some survey respondents in this group may have said that the screen product played a non-central role in their decision to visit they were not valued as screen tourists.

International / Domestic Tourists

International tourists refers in this Study to those visitors coming to the UK from abroad. They are also referred to as inbound tourists. Domestic tourists are those from the UK.

Rest of England

Tourism to the UK is assessed geographically, including the overall UK, and the nations and regions, including London. This Study focuses on England outside of London – i.e. the Rest of England. This is the region supported by Creative England.

Screen Products

This Study is concerned with feature films and television drama – referred to as screen products.

Tourist Spend

Core screen tourists have been valued depending on the amount they are assumed to have spent on the day of their visit to a location. Tourism industry spend figures for different types of visitor have been used to calculate this.

Value

This project has estimated value at a number of sites and nationally. The value refers to spending by international core screen tourists during one day at a location.

1.11. About Olsberg•SPI

This Study has been undertaken by Olsberg•SPI, a leading creative screen industries strategy consultancy that provides advice to public and private sector clients, specialising in the worlds of film, television and digital media.

Formed in 1992 and based in London, the firm works with a diverse client base that spans multi-national public authorities, national governments, film institutes and screen agencies, studios and facilities companies, broadcasters, trade associations and guilds, and private companies.

The firm's previous work in screen tourism includes the 2007 study *Stately Attraction: How Film and Television Programmes Promote Tourism in the UK*.

1.12. Acknowledgements

Olsberg•SPI is particularly grateful for the generous and invaluable help, insight, access and collaboration provided by the eight locations that this Study is based on, including site owners / managers and employees, and those living in the locations or working for related agencies that provided assistance.

SPI is also very grateful for the support and input provided by Creative England for this project, as well as the input and advice offered by VisitEngland. This included invaluable input into the design of the survey and the research phase, supplying introductions to DMOs, as well as being consulted during the development of the final report.

The team would also like to thank the DMOs, agencies and other individuals that assisted in the research, as well as the site surveyors. A full list of consultees is presented in Appendix Three.

2. STUDY FINDINGS

This section details the quantitative results of the project, as well as outlining a range of qualitative insights surfaced by the project.

2.1. Survey Results

This Study analyses primary data gathered through surveying visitors to eight locations in England that were assumed to be attractive to both screen tourists and non-screen tourists. The sites were:

- Alnwick Castle
- Bampton
- Castle Howard
- Holkham
- Lyme Park
- Puzzlewood
- West Bay
- Wollaton Hall

Site surveys were undertaken at six locations, with online surveys at undertaken at all eight. For the two sites that had online surveys only one (Wollaton Hall) already had a site survey scheduled during the time in which the surveys for this project were being undertaken. The other location, Holkham, was confirmed later than the other sites and it was not therefore possible to arrange a site survey.

The methodology for gathering survey data is outlined in Section 4.

2.1.1. Total respondents

In total, there were 1,006 individual survey respondents across both site and online surveys. Respondents were also asked how many people were in their immediate party during the visit, including themselves. Where applicable, this only included the immediate family or friends party that respondent was representing rather than a larger coach party or travel group. Factoring in data on the group size represented by each respondent, the surveys span 3,043 visitors in total.

Table 4 – Total Survey Respondents

Survey Type	Respondents	Group
Site	424	1450
Online	582	1593
Total	**1,006**	**3,043**

For the valuation and proportion aspects of the Study, the larger group population was assessed. This is because it can be reasonably assumed that the group would not have been present at the location without the presence of a core screen tourist as a driver, even if they did not necessarily all share the same level of motivation. For other methods of assessment, such as gender and age, only individual responses were utilised since other members of a party could represent different groups.

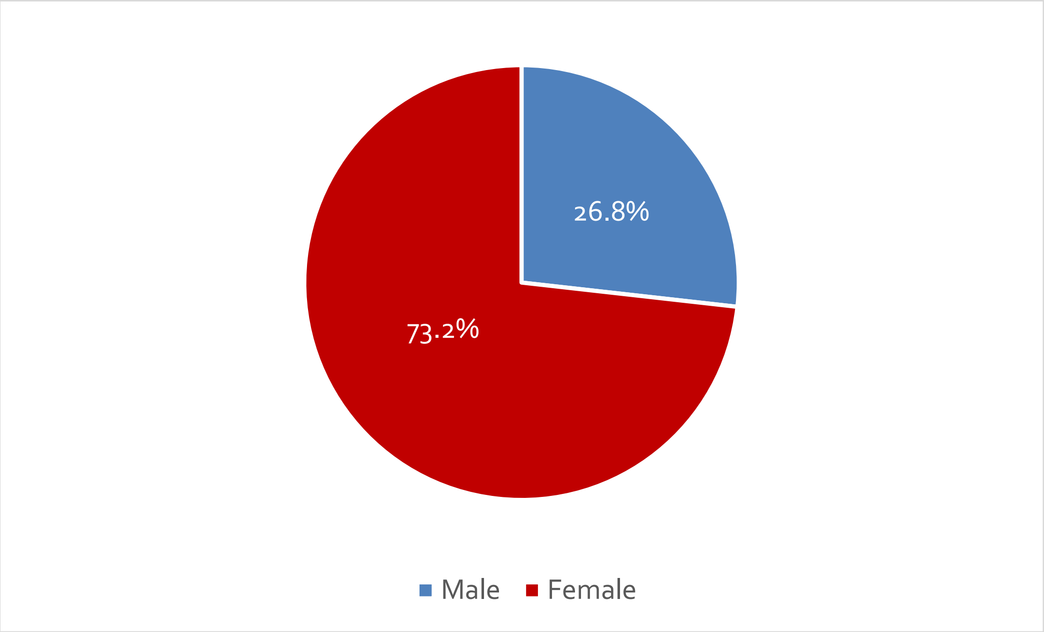
A full breakdown of the individual and group sample sizes and proportion of domestic and international core screen tourists is presented in Section 1.5.1.

2.1.2. Gender of respondents

Data on the gender of all respondents were gathered. Overall, there was a higher proportion of female respondents than male, as outlined in Figure 9.

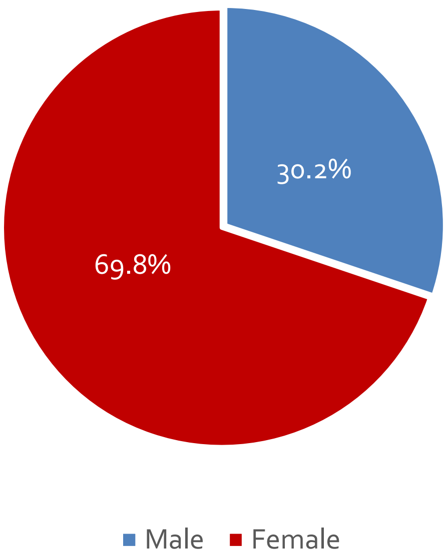
Male respondents were actually slightly more likely to be core screen tourists than female respondents, as outlined in Figure 10.

Figure 9 – Survey Respondents by Gender



Note: chart based on individual survey respondents

Figure 10 – Core Screen Tourists by Gender



Note: chart based on individual respondents

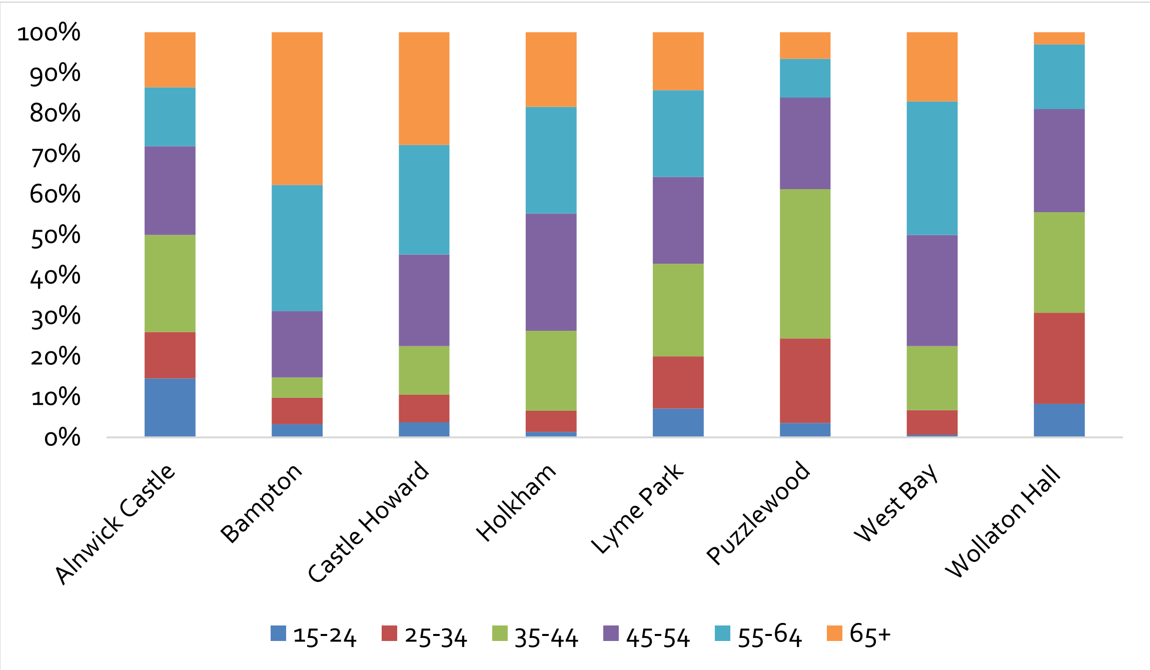
2.1.3. *Age of respondents*

Analysis of respondent age showed a relatively wide spread, with the age profile of visitors varying from site to site. For example, Bampton, Castle Howard and West Bay attracted more over-45s than Puzzlewood, Wollaton Hall and Alnwick Castle, which attracted a higher proportion of younger respondents.

Survey data do not give the reasons for this, but this spread in age demographic is assumed to be related to a number of factors, such as the marketing of some sites, such as Puzzlewood and Alnwick, as destinations for families. The fact the latter three all hosted key screen productions that have appeal to families and younger visitors is also assumed to be a factor. Among others, these include the first two *Harry Potter* films at Alnwick, and *Doctor Who* and *Merlin* at Puzzlewood. *The Dark Knight Rises*, which filmed at Wollaton Hall, is perhaps relevant to a slightly older demographic, with a 12A rating in the UK, but has appeal to teens and young adult viewers.

It should also be underlined that the relatively small number of respondents in the 15-24 group reflects the fact that when attending a location as part of a family group, parents would often (though not always) choose to answer the survey.

Figure 11 – Respondent Age Group, Site and Online



Note: chart based on individual respondents

2.1.4. *Volume of core screen tourists*

The data gathered by the surveys were processed using bespoke data modelling that was created for this project.

A central aspect of this was the isolation of core screen tourists at each location. These are visitors for whom the associated screen production was the only, or main, reason for their visit.

Isolating core screen tourists at each site enabled the identification of the proportion of overall visitors – i.e. the volume of core screen tourists compared with the volume of visitors for whom a screen production played less of a role, or no role, in their decision to visit.

Furthermore, the group of core screen tourists was assessed at each site to identify the volume of domestic and inbound visitors.

Figure 12, below, shows that international core screen tourists represented around a third of this core group, with the rest coming from the UK. The higher volume of domestic screen tourists reflects the fact that domestic tourism levels are higher than inbound: in the UK generally, 79% of tourism spend is domestic, with 21% international.

Figure 12 – Core Screen Tourists: Domestic vs International

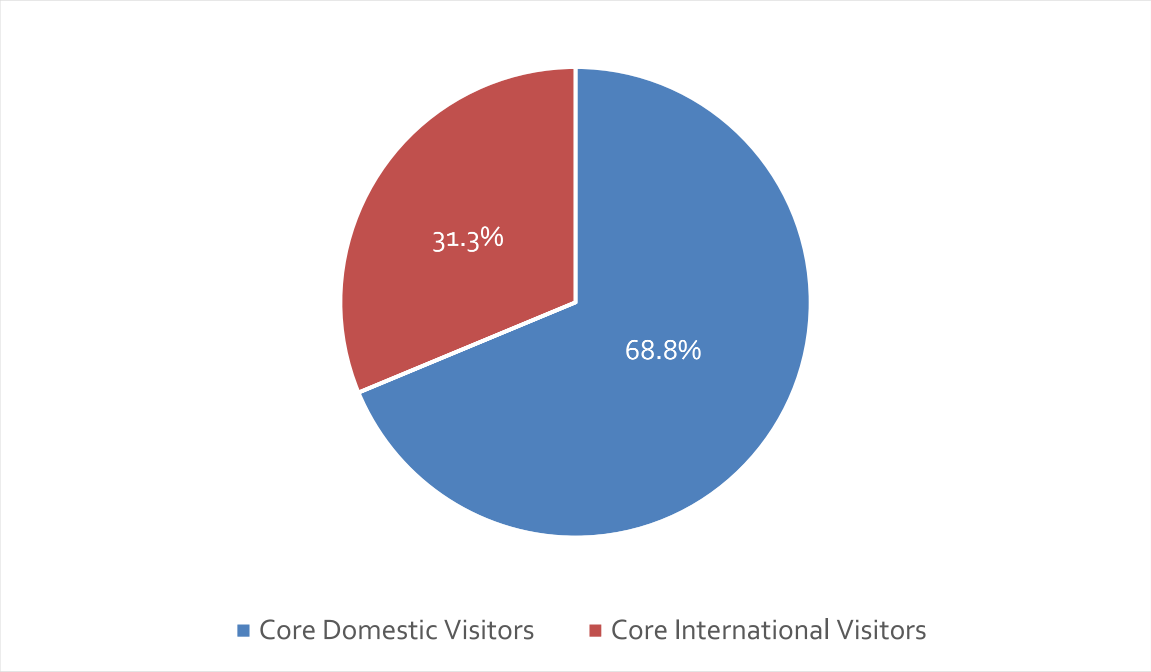


Chart based on overall group size.

For the eight sites the value was then calculated annually for both types of core tourist, while an overall percentage was calculated that showed the average proportion of core screen tourists against general tourists at dual-appeal sites. Looking specifically at the site results, 36.1% of the international group were core screen tourists, with 11.6% of domestic visitors.

2.1.5. Value of core screen tourists

Having analysed the volume of screen and general tourists, an annual value for core screen tourism at each site was estimated, based on the day spend of tourists at each site. This involved applying the proportion of core screen and general tourists on the site survey day to annual visitor numbers. Within the annual core screen tourism population, different official day-spend value was assigned depending on whether they were international or domestic.[31]

The results, outlined in Table 5, below, show that screen tourism can be highly valuable for locations with all sites, apart from Wollaton Hall, estimated to have attracted significant day-visit spend from screen tourists in 2014. Alnwick Castle was the best-performing location, with

[31] Only site respondents were used in valuing screen tourism at the sites, since online responses did not represent a single day in the site's year. Online responses were used in other aspects of the Study. The site valuation methodology is outlined in detail in Section 4.8.

day-visit spend from core screen tourists estimated to be worth £4.3 million in 2014. Bampton saw the second-highest value, with £2.7 million estimated.

The success of these locations clearly underline the importance of a highly popular screen product in attracting higher levels of screen tourism. The top-valued locations also point to the potential longevity of the screen tourism effect. While *Downton Abbey* is current – indeed the first trailer for the fifth series of the show was aired on ITV the evening before the Bampton survey took place – the key screen products at the other two top-valued locations were not. The first two Harry Potter films are more than a decade old, while *Pride and Prejudice* continued to attract international screen tourists to Lyme Park nearly 20 years after the initial BBC broadcast.[32]

The top three sites also demonstrate that existing profile as a tourist destination can also be important for pronounced screen tourism effects. While Bampton may not have had a particularly high profile in this regard, it is situated in the Oxfordshire Cotswolds – an area of England that several screen tourists on site spoke about wanting to visit.

Outside of the top three locations there were still significant value for other sites, including West Bay and Holkham, with £1 million and £0.9 million. The levels seen at Castle Howard and Puzzlewood were slightly less than this, with the former perhaps reflecting the fact that the *Brideshead Revisited* television adaptation that shot there is more than 30 years old. While many Puzzlewood visitors were interested in the screen productions filmed at the site, the lower number who defined themselves as core screen tourists could point to the fact that Puzzlewood is an impactful site in its own right, and seeing this atmospheric forest is a major standalone draw, even for those interested in screen tourism. As one respondent noted, they "spent the visit trying to spot *Merlin* locations but would have gone anyway simply because it is such an amazing woodland".

In several cases, the value of domestic core screen tourism outstripped the value of international. In this sense, the higher value of international core screen tourism at Bampton suggests that a dramatic portrayal of a 'traditional' England that foregrounds heritage can be a very powerful driver indeed for inbound tourists.

Visitor volume played a part in value. For example, Bampton showed the highest international core screen tourist proportion, but since it attracts less visitors than other sites, resulted in it receiving a lower estimate.

[32] It should be noted that other productions have used both locations.

Table 5 – Estimated Annual Value of Screen Tourism at the Eight Survey Sites

Location	Annual visitors	Annual value of domestic core screen tourists (£m)	Annual value of int'l core screen tourists (£m)	Annual value of core screen tourists (£m)
Alnwick Castle	274,193 (2014 actual)	3.1	**1.2**	4.3
Bampton	68,704 (Estimated)	1.1	**1.6**	2.7
Castle Howard	230,000 (Estimated for 2014)	0.4	**0**	0.4
Holkham	543,000 (Estimated for 2013)[33]	0.9	**0**	0.9
Lyme Park	115,000 (Estimated for 2014)	0.5	**0.3**	0.9
Puzzlewood	57,500 (Estimated)	0.1	**0**	0.1
West Bay	215,850 (Estimated)	0.8	**0.2**	1
Wollaton Hall	229,993 (2013 actual)	0.1	**0**	0.1

Note: Wollaton Hall and Holkham were online surveys. Respondents for each were considered to be a direct proportion of overall visitor numbers. Puzzlewood advised that annual visitor numbers were between 55,000-60,000 so 57,500 used. Some totals do not sum due to rounding.

Annual visitor numbers or estimates for Alnwick Castle, Castle Howard, Holkham, Lyme Park, and Puzzlewood were sourced from the locations. The Wollaton Hall figure was sourced from Experience Nottinghamshire. Where possible, 2014 actual figures were used, or locations were asked for a 2014 estimate. Where these were not available, 2013 actuals or a general estimate were used. Annual values were calculated using 2014 spend data, which means there is a year

[33] Since Holkham Hall and Beach have featured on screen, this estimate includes admissions to ticketed Holkham attractions, estimated number of visitors based on car park ticket sales at Holkham estate and beach, and an estimated number of walkers. Special events have not been counted.

misalignment in calculating the value at some sites. However, 2013 volume is assumed to be generally equivalent to 2014 and satisfactory for valuation purposes.

At two sites, Bampton and West Bay, no annual visitor figures were available. To estimate an annual figure the relationship between the number of people surveyed on site and the total number of people on the survey day at each of the four remaining site survey locations was assessed. The average proportion was used to estimate the number of people at West Bay and Bampton on the site survey day.

To scale up to an annual estimate the relationship between visitors on the survey days and the annual visitor numbers for the four sites was assessed. Using the average proportion we scaled up the Bampton and West Bay day visitor estimates to an annual figure.

For West Bay, existing 2013 visitor data covered both West Bay and Bridport so did not supply a clear overview of visitors to West Bay. Data on council-owned car parks in West Bay showed that 250,397 car parking tickets were sold in West Bay between April 2013 and March 2014. However, while this provided a general for visitor volume check, a proportion of the car park users will be locals and other visitors will travel by other means.

2.1.6. Valuing the Rest of England – key assumptions

The values of core screen tourism at the eight survey sites were then utilised to estimate the value of screen tourism to the Rest of England, including those sites. This process utilised a Scaling-Up Method to build a picture of value.

The individual site valuations are considered to be robust in that they utilise primary data on the proportion of a tightly defined group of core screen tourists, and calculate an annual estimate through the careful application of annual visitor data and day-visit spend averages.

However, estimating an annual value necessarily involved making a number of assumptions in order to scale up the site findings. This is because there is a lack of hard data on the number of similar dual-appeal locations that would, like the eight survey sites, be able to attract both screen and general tourists.

The assumptions made during the Scaling-Up Method are:

Eight survey sites are representative

One key assumption is that the eight sites are a representative base of dual-appeal locations for the Rest of England. Given the resources available for this project it was not possible to undertake a wider survey process but the eight were carefully chosen to represent a cross-section of sites, spanning different areas of England, different types of location and different types of screen production. Surveying more locations would obviously give a larger sample, and should be considered for further research.

Value of site locations can be applied to other destinations

To create a larger initial base the Study assessed 92 further dual-appeal locations to which one of the value of eight locations was applied.[34] These 100 sites were collated from a range of sources including movie maps, articles and other research undertaken when assessing potential locations for surveys. They do not represent a top tier of the most popular screen tourism sites, but rather a spread of destinations similar to those in the survey sample.

[34] For transparency, a full list of the initial 100 scale-up locations is included in Appendix Four.

This was a highly detailed process in which each additional site was assessed and the relevant value applied based on a number of factors, such as comparability of production or location, or the profile of the production. A significant number of the scale-up locations – 29 – were not assigned value to reflect that at some of the sites no international core screen tourists had been detected.

As the scaling-up was undertaken on a location-by-location basis the average of the 92 does not reflect the average value from the eight sites.

There is a larger number of dual-appeal locations

The base of 100 locations is not considered to be representative of all potential screen tourism locations. The UK has a production history that is over a century old, and has seen very high levels of film and television production in recent years. In 2013 alone there were 241 feature film shoots, with over 3,700 features shot in the UK since 1994. Clearly, not all will have been successful or, indeed, have used locations but the potential is clear.

These production figures do not include television drama, underlining the likelihood that the number of potential screen locations is well above 100.

Consideration was also given to the potential to attract screen tourism – since not all films continue to attract interest. To this end, movie maps of established locations or high-profile productions were assessed, which resulted in a conservative estimate of 250 locations.

2.1.7. Rest of England value

The first part of the Scaling-Up Method, which involved applying the value of the eight survey locations to a further 92, resulted in a value for 100 dual-appeal locations of £45.3 million.

Further upweighting was then applied to this figure to reflect the assumption that the total of screen tourism locations would be higher than this. Research into locations in the Rest of England featured in British Tourism Authority movie maps showed a further 120 sites related to productions between 1939 and 1999. With adjustment to include 1999-2014 there are an estimated 250 locations. This results in an **annual value of international core screen tourism to locations in the Rest of England in the range of £100 million-£140 million in 2014**.[35]

2.2. Survey Findings – Further Insights

In addition to gathering primary data on core screen tourists and other visitors, the survey and research process gathered a range of key qualitative insights about screen tourism, which is presented here.

2.2.1. Content range

The survey locations were chosen, in part, in order to examine the effects of different types of content – and the survey results demonstrate that screen tourism can be generated by very different types of productions. These include period dramas, family fare, fantasy, sci-fi and even dark storylines. Both period and contemporary productions were found to have attracted screen tourism, as did locations that had represented England on screen and locations that had doubled for locales in fantasy or sci-fi productions.

The three top locations for international screen tourism generation demonstrate the breadth of content that can appeal to visitors: *Downton Abbey* is a period, multi-character, television drama;

[35] The full methodology is outlined in Section 4.

the first two Harry Potter films are part of a family-oriented fantasy film series; *Pride and Prejudice* is a period romantic drama adapted from classic literature.

The strong effects seen by locations that hosted *Downton Abbey*, *Pride and Prejudice* and Harry Potter suggests that series, whether film or television, can have stronger impacts than standalone productions. This is related to the extended viewing opportunities, and greater screen time. The fact that *Pride and Prejudice* and Harry Potter are both literary adaptations also suggests that productions with a large, pre-existing, audience base are also particularly impactful.

One particularly interesting finding is that dark stories are not necessarily a barrier to screen tourism. *Broadchurch* may have hinged on the murder of a child but 30.8% of international site respondents were core screen tourists, along with 6.9% of domestic site respondents.

This suggests that compelling, high-quality screen experiences can induce tourism regardless of the plot or tone – though it should be noted that *Broadchurch* did showcase West Bay's arresting scenery, and dramatic human relationships.

A survey of tourism businesses in West Bay also found that 63% of respondents did not think that *Broadchurch'*s dark storyline would deter visitors – although over 30% remained unsure.[36]

This trend has been evidenced by other studies. For example the Swedish Millennium films, despite their dark storylines, have helped draw tourism to the country with around 10,000 tourists taking a guided Millennium tour in 2010. [37] A survey undertaken by the Stockholm City Museum in 2010 showed that 6% of respondents said the Millennium walking tour was the main reason they had travelled to Stockholm.[38]

The age of content also did not seem to be a barrier, with a series first broadcast more than 30 years ago (*Brideshead Revisited)* and a series broadcast nearly 20 years ago (*Pride and Prejudice*) continuing to inspire visits. It should be noted though that these shows have enduring popularity and it is recommended that further research into the reduction of impact over time be undertaken.

2.2.2. Location identity

Of particular interest to location authorities and DMOs is the fact that a number of the key screen tourist locations had not played themselves on screen – having doubled for other, often fictional, locations.

This was true for Bampton in *Downton Abbey*, West Bay in *Broadchurch*, Alnwick Castle in Harry Potter and Lyme Park in *Pride and Prejudice* – which all generated significant screen tourism levels. The fact that two sites attracting lower levels of screen tourism had doubled as locations in the US – Wollaton Hall (*The Dark Knight Rises*), and Holkham (*Shakespeare in Love*, which used the estate's beach*)* – might suggest that fictional locations are better drivers of screen tourists if

[36] *The Impact of Broadchurch on Tourism Businesses in West Dorset April-October 2013.* Ibid.
[37] *The Millennium Report – Economic impact and exposure value for the Stockholm region in the Swedish Millennium feature films*. Ibid.
[38] *Ibid.*

they are still set within England (such as *Broadchurch*) or within a sci-fi or fantasy context (such as Alnwick Castle's use as Hogwarts).[39]

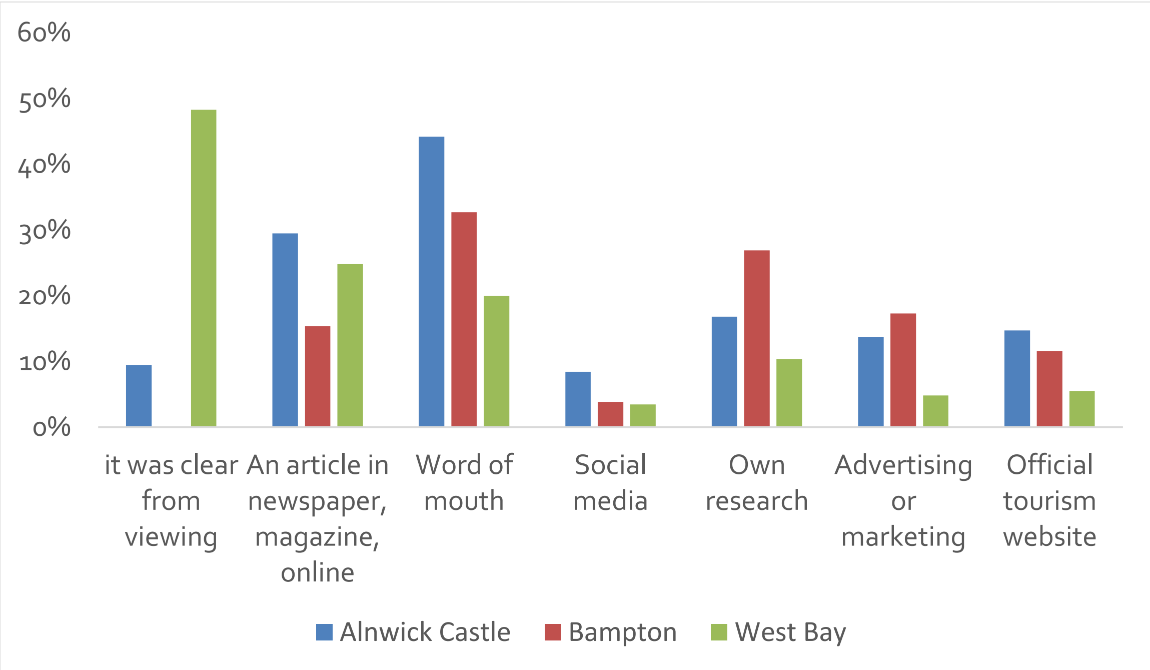
Respondents were asked how they knew that the location was featured in the screen product, with the results from the three site surveys discussed above outlined below. The results show that for all three sites, word of mouth was important in discovering the location as were media articles, whether online or in print.

At West Bay, a high number of respondents described having recognised the fictional town of Broadchurch immediately. This reflects the high number of repeat holidaymakers at this destination and also the fact that the cliffs and beach are well-known. Bampton, on the other hand, had no visitors that recognised the location on screen.

Screen tourists can be proactive in finding out where an on-screen location actually is, with individual research a factor at all three locations. This reflects easy access to information online – indeed, a viewer can search for location information while watching TV, using a mobile phone, tablet or laptop. Many also pointed to advertising and marketing, or official DMO websites.

The fact that viewers are searching for more information on locations they are potentially interested in visiting underlines just how proactive DMOs and locations need to be in terms of publicising the use of locations that may not 'play' themselves on screen. Closer links between screen and tourist agencies, as outlined elsewhere in this Study, can play a central role in this.

Figure 13 – How Respondents Linked On-Screen Location to Destination



There is evidence that the strong screen tourism locations also had an underlying appeal to tourists interested in England or a specific region. This is particularly true at sites such as

[39] It should be noted that Holkham and Wollaton Hall were two sites with online-only surveys so results could point to limitations in survey distribution or response. Further research is advised on the different between fictional and non-fictional locations as screen tourism drivers.

Bampton, Alnwick Castle and Lyme Park, which also have strong appeal to tourists interested in heritage buildings and landscapes.

Bampton, in particular, is relevant for this point – able to represent a bygone era of culture and heritage as depicted on screen in *Downton Abbey.* The *Downton Abbey* link in Bampton also served to differentiate the village within a region of particular tourist appeal: several visitors spoke of wanting to see the Cotswolds, and decided on Bampton specifically because of the TV link.

All of the leading survey destinations featured iconic locations – such as Hogwarts, or the cliffs at West Bay – prominently on screen so that they were recognisable to viewers. Some, such as West Bay and Bampton featured a number of different locations in a compact locale. Stories in which location is integral to plot can be significant for inducing screen tourism.

2.2.3. Visit overlap

Several core screen tourist respondents had also visited, or planned to visit, other screen tourist sites. This was particularly evident in Bampton, with several respondents also visiting Highclere Castle during that day, which is the key *Downton Abbey* location.

The potential for visit overlap offered by screen tourist locations is particularly interesting as a tourism driver since this can drive screen tourists to different sites, either within an area or around England (and the UK). In addition to the Highclere-Bampton day trippers, screen tourists evidently also base wider itineraries around locations. For example, US screen tourists present in Bampton also described how they would be travelling to Scotland during the same trip to view locations from the Starz-produced TV series *Outlander*.

Tourist sector opportunities, in the case of a successful film or television programme, have the potential to drive visits to a number of locations. Indeed, films and televisions often use multiple sites – with *Outlander*, for example, filming at 16 Scottish locations.[40]

It is also noted that there is further visitor overlap between film locations and other locations that, while not appearing on screen, might relate to the plot or story of the screen product. While this element of overlap was outside the scope of this project, the potential for promoting related locations is clear. For example, a Sunday Times article on *Wolf Hall* outlined six filming locations and six locations associated with Henry VIII.[41]

2.2.4. The rapid impact of screen tourism

One interesting trend identified by the survey process is that screen products can drive tourism before they are even released to the public. For example, seven respondents said *Star Wars: Episode VII – The Force Awakens* had been a factor in their visit to Puzzlewood, even though the film was still in production at that time, and there was no official confirmation of the film having shot there.

Some inbound tourists surveyed at Bampton on 31st August were also travelling to Scotland, having seen *Outlander*. The show premiered on US television on August 9th. A further example can be seen in the fact there a tour was being advertised in 2014 by one operator to take tourists

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[40] *Outlander series drives Highlands boom*. The Times, 29th December 2014.
[41] *At home with Henry*. The Sunday Times, 18th January 2015.

on a *Poldark* trip that includes visits to locations to the original BBC series and from the new series set to be broadcast in 2015.[42]

Clearly, this is a phenomenon that will be more relevant to high-profile films or franchises that have built anticipation in the marketplace rather than new work.

Another trend in film tourism that underlines how rapidly visitor uplift can occur is seen by the fact that locations can attract production tourists – those visitors who travel in an attempt to see filming take place, or to see the stars. Anecdotally, West Bay attracted a number of visitors to the town during filming of the second series of *Broadchurch* for this reason.

2.2.5. Highbrow vs lowbrow

Interaction with survey respondents at the six sites revealed differing cultural views towards screen tourism as an activity. Some visitors appeared reluctant to discuss the fact that a film or television drama had played a part in their visit, underlining something of a negative connotation to screen tourism among certain people. This appears to be linked to a perception of the activity as somehow a lowbrow undertaking.

This was particularly evident at sites with historical links, or other draws for tourists. Interestingly, this highbrow/lowbrow issue seemed less pronounced when a screen product was linked to literature. For example, at Lyme Park most screen tourists seemed happy to admit that they had come to the site because of Mr Darcy in *Pride and Prejudice*. At Alnwick Castle, however, this was less evident. The former has links to literature which people seemed happier to admit an association with.

2.2.6. Coach trips and spending

While average tourism-sector spend figures were used for the valuation aspect of this Study, it was clear that screen tourism spend can differ widely across visitor type.

This is particularly relevant for locations that attract coach trips. Coach trips are a key driver of tourist visits, offering individuals or groups a convenient way of visiting a location that may not otherwise be easy for them to travel to.

However, it would appear that the itinerary-based nature of such travel limits spending opportunities at some sites. This was apparent in Bampton. While the village attracted a significant number of coach-based tourists – including from the UK and from Norway – these typically only stayed long enough for visitors to see the locations, creating a limited opportunity to spend money.

This can mean a disparity in the amount of value generated by a core screen tourist and the amount received by a location. This is particularly relevant to international tourists who will clearly spend much higher amounts on their overall trip than a domestic visitor.

2.2.7. Interest in screen tourism among general visitors

Regardless of whether they had visited the location in question as core screen tourists, all respondents were also asked about their attitudes to screen tourism generally.

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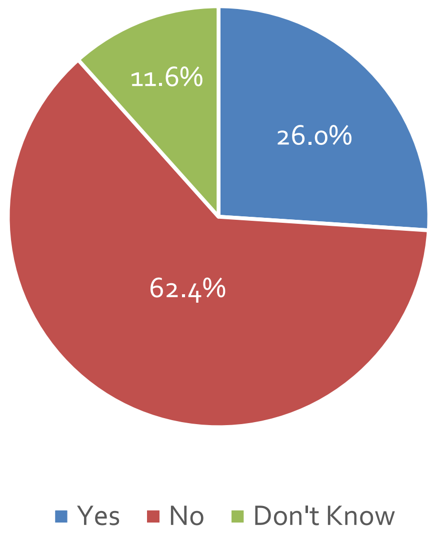
[42] P and P Tours.

Surveys were used to capture data on whether screen tourism was growing in importance as a tourist activity. Over a quarter of all respondents said they were more likely to visit screen tourism locations than they had been in the past.

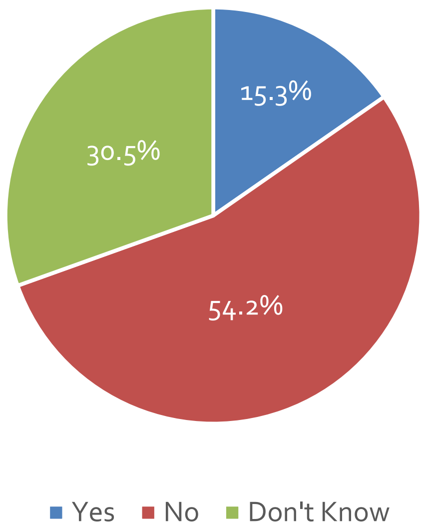
Figure 14 – 'Do you feel you are more likely to visit locations because of their links with film or television drama now than you were three years ago?'



Note: Chart based on individual survey respondents.

Data across all sites also shows that 15.3% of all tourists planned further visits to screen locations.

Figure 15 – 'Do you plan to visit more locations with links to film and television drama in the next 12 months?'



Note: Chart based on individual survey respondents.

2.2.8. Repeat visitors

One issue identified at a number of sites was the fact that a location's ability to attract repeat visitors served to potentially dilute the screen tourism impact.

While data on this group was not collected, a number of visitors to West Bay described having been highly interested in *Broadchurch* but the fact they were repeat visitors meant they were not therefore isolated as core screen tourists.

The types of visitors at each survey site are outlined in Section 5.

2.3. Maximising the Benefits of Screen Tourism

While this Study is primarily concerned with the value of screen tourism, the survey and research process uncovered a number of key insights into the maximisation of screen tourism that will be relevant to locations, DMOs and other agencies.

It is clear from this project – and the broad range of literature on the subject – that successful screen exposure can result in an increase in visitors. Given the fact that a specific activity may be driving screen tourists, locations and DMOs should consider how the needs of such tourists might differ from other market segments, and how they might be monetised.

It was noted that a number of Study sites had responded to the presence of screen tourists. Some locations had developed strong additional activities that could satisfy visitors who came because of the film or TV connection. These included a broomstick activity at Alnwick Castle and the opportunity to dress up as an Edwardian person at Lyme Park. These were family-oriented interactive activities that complemented the historical aspects of the site in conjunction with their film and television associations.

At West Bay there were both DMO initiatives, such as the *Broadchurch* trail leaflet produced by Visit Dorset, and smaller-scale private commercial initiatives by local businesses – such as the *Broadchurch* Burger offered for sale at a food kiosk in West Bay. (According to the menu, the burger costs £3 and "Looks and tastes just like a cheeseburger but much more thespian".)

However, it was clear from the researchers' interaction with screen tourists that further maximisation was certainly possible, both in terms of improving information available and monetising the presence of screen tourists in a location.

For example, conversations with tourists often pointed to a desire for more knowledge about specific locations and the production itself. This was particularly evident in destinations with multiple locations, such as Bampton and West Bay. Indeed, surveyors were often asked by visitors about finding specific locations (including those that were not actually filmed in the locale).

While visitors may know the screen product very well, the physical geography of a location can sometimes bear limited resemblance to the geography seen by viewers on screen. Clearly, enabling screen tourists to understand the locations they have come to experience contributes to a satisfactory visit. However, connecting screen tourists with such information can be a challenge – particularly in destinations, such as West Bay, that are large and attract lots of general visitors.

There was further potential to maximise spend from screen tourists at some sites. This was particularly evident in Bampton, a village location. Several visitors noted the lack of opportunity to purchase souvenirs. (The Bampton Archive, which does stock some souvenirs, opened partway through the survey day). As one respondent commented: "Please provide a tea shop".

The spend issue is complicated by the time-pressed nature of some visits, particularly those on coach tours that may only give tourists a short time at the location.

Strategies for maximising the impact of screen tourism need to be carefully considered. Destinations can be sensitive, particularly if they are experiencing an influx of screen tourists for the first time, or if they appeal to other types of tourists that may have no interest in the screen production. Clearly, destinations do need to consider how to cater for incoming screen tourists while still remaining relevant and unchanged for the needs of visitors who are not interested in the screen link.

2.3.1. Managing expectations

Impacts resulting from screen exposure can be complex: locations, DMOs and other agencies should be realistic about this. While being featured in a successful film or television series can lead to a dramatic upturn in visitors it is also the case that many productions do not hit the audience numbers and popularity of Harry Potter or *Downton Abbey* and therefore do not stimulate visitors to travel across the world to a location.

Even for successful productions there are issues for locations to consider. Given the multiple locations used by many productions, it may be the case that one iconic location receives the bulk of attention, drawing attention – and screen tourists – away from other locations that might have been featured on screen. For example, *Broadchurch* screen tourism appears to have been largely centred on West Bay – even though key locations were filmed elsewhere, including in Clevedon in Somerset. A Sunday Times article notes that "locals have complained online that Somerset's role is being 'ignored' by critics too busy swooning over Dorset's fabulous cliffs."[43]

Interaction with tourists in West Bay demonstrated this to some degree, with some questions about locations that were not in the town.

In addition, the unpredictability of success is something for locations to consider. While this is less of an issue for franchises with huge in-built audience appeal (such as *Star Wars)* it can be very difficult to predict whether a film or TV series will be successful – and how much of a part a specific location might play in the finished product.

Producers are interested in visually impactful, original locations and these may not always be the best locations, in terms of maximising any subsequent tourists. This means that if screen tourism does begin to flow from a production, locations may not be in a position to maximise the benefits. It may not be possible (or desirable) to charge entry, develop a shop or café, or install related activities.

Infrastructure is also a key consideration. While parking and transport capacity issues did not appear to be a problem at the locations surveyed, this has proved to be an issue elsewhere. For example, the village of Goathland in North Yorkshire saw tourist visits rise from a steady 200,000

[43] *OK, Miller, let's go find the real Broadchurch*. The Sunday Times, 11th January 2015.

prior to 1991 to more than 1.2 million, with the TV series *Heartbeat* considered to be the primary factor.[44] As a result the community has pointed to issues with crowding and car-parking.[45]

For locations with a pre-existing tourist profile, an upturn in screen tourists can be a challenge for a number of reasons. It is clear from the survey sites that there is a balance to be struck in catering to new screen tourists and other types of tourists whose interest in a location might stem from other parts of its offer, or pre-date its depiction on screen. Tourist expectation, and the development of the site should to be managed carefully to avoid the location's offer being misunderstood.

The challenges of this were noted, for example, in the typical differences in opinion recorded at the locations. At Puzzlewood, for example, one respondent commented: "A map with locations… would be beneficial. Also some information about what was filmed there and when." Meanwhile, another commented: "Please don't turn Puzzlewood into a *Merlin/Atlantis* or any other production-based theme park. I am keen to return but really do not want to if all I am going to see is references to those productions. More detailed information on its amazing history is what's needed."

Similar sentiments were evident at Alnwick Castle. While two survey respondents commented that they would like to see more Harry Potter-related information or activities, another commented that they did not like the 'theme-park style' Harry Potter activities and another commenting that there should be a better balance struck between the history and the Harry Potter exhibits.

2.3.2. The benefits of close links between screen and tourism agencies

The screen tourism opportunity that exists in the UK could be further maximised through closer links between tourism and screen agencies – of the kind formed between Creative England and VisitEngland. It is also noted that DMOs and other tourism agencies routinely link with film companies for promotional activity based around a film – as seen with the major campaign undertaken by VisitBritain around the release of *Paddington* – or for more general promotional campaigns.

Screen and tourism agencies have high levels of market knowledge and insight into their respective sectors and the sharing of this knowledge should be encouraged. For example, with very high production levels in the UK there is a clear need for locations: information exchange, even informally, between screen and tourism agencies could help alert productions to relevant, perhaps underused, locations, while locations could also be kept aware of any forthcoming screen opportunities.

Ongoing research and trend work should also be undertaken so that locations and DMOs can understand changes in the screen tourism space, including insights into the types of content that are inducing new visits.

The expertise of agencies in both sectors should also be harnessed to meet the need for better screen tourism materials at some sites, including digital guides. For example, screen agencies

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[44] Mordue, 2001. Referenced in *Film-Induced Tourism. Aspects of Tourism 25*, p 76. Sue Beeton, Channel View Publications, 2005.
[45] *Film-Induced Tourism. Aspects of Tourism 25*, ibid. p 132-133.

may have access to film-making or on-screen talent that could be utilised in the creation of high quality materials and content regarding locations and the production of the film or TV drama.

Working with tourism agencies could help tailor such material to relevant tourist demographics, and ensure it is widely distributed to visitors.[46] Such strategic alignment would also enable the creation of materials that could function as regional itineraries – helping tourists understand other film and TV locations that may be easily accessible from a site.

Closer working should also explore further press and marketing opportunities. Promotional activity between agencies and film companies for individual films has already been outlined but there may be wider synergies around released that can be maximised. Such media opportunities are already being explored. For example, VisitBritain accessed the talent behind *Paddington* at the film's global press junket in London, shooting a series of videos in which stars like Nicole Kidman were asked about their favourite places in London and where they would take Paddington on holiday[47]. Clearly, there would be opportunities to extend this approach to other types of screen content found to potentially generate tourism.

Such links would also assist locations in better maximising any screen tourism opportunity. One way in which this could be achieved is the creation of a location toolkit. Such an information product could be used to advise locations on a number of factors including, for example, insights into how information on a location and how it is featured in a relevant television drama or feature can best be disseminated in order to reach viewers who might subsequently visit. Such a product could also feature demographic information and international release dates for specific products so locations can target their marketing to the right territories at the right time.

This is particularly important given the fact that many locations are 'actors' – doubling for somewhere else, whether fictional or real.

A toolkit could also outline best practice with regards to how locations produce and present visitor information and materials – and balance the needs of screen tourists with those of other visitors.

Agencies could also explore creative ways of continuing to support screen tourism to destinations beyond the release – looking at methods of ensuring that tourists continue to understand the screen links, and that those interested in the screen product understand the link to specific locations in the UK.

Finally, given the challenges of measuring screen tourism, agencies should work together to identify and introduce robust systems to measure the impact and value of screen tourism to the locations and regions in which they are situated.

2.4. Conclusions and Recommendations

It is clear from this Study that, for locations, hosting the production of a film or television drama can lead to a significant subsequent uplift in visits. Experiencing in real life the locations and landscapes that have been seen on screen can be a primary reason for tourists to travel long distances and spend large amounts of money. Screen tourists were detected at all of the eight

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[46] An overview of Creative England, and its support for locations, is presented in Appendix Five.
[47] Details from VisitBritain Film & TV Tourism Newsletter sent on 20th January, 2015.

sites surveyed for this project. While the volume varied significantly, the value at some sites was highly significant.

This finding is important at a time when the UK is seeing record film and television production levels. With film-makers showing real interest in utilising locations right across England, the potential of the screen tourism opportunity is increasing.

As a phenomenon screen tourism is relevant to both domestic and international tourists and spans generations – often within the same travelling group. It is also relevant for all types of content, from period drama to dark, contemporary stories, family fare to fantasy and sci-fi. It was also evident that some tourists will travel to a location without even having seen the screen product in question or the destination being officially confirmed as a location – as evidenced by tourists interested in *Star Wars: Episode VII – The Force Awakens* travelling to Puzzlewood.

Shows with enduring appeal, such as *Brideshead Revisited* and *Pride and Prejudice* continue to generate significant levels of screen tourism long after they were originally aired – which points to the potential for significant value over time for a location.

Sites with the highest appeal in the survey group were home to iconic locations that featured very prominently in the related screen productions, and played host to key dramatic moments. These locations can be buildings, such as Lyme Park and Castle Howard, or landscape features – such as the cliffs at West Bay.

Doubling as a fictional location does not appear to be a barrier for a location attracting screen tourists. Indeed, one study notes that 'Identifying the locations where films have been produced has become a contemporary leisure activity'.[48] However, the fact that no international core screen tourists were detected at two sites at which key productions had doubled the location for the US suggest that there must be some link with the location and its surrounding. However, the fact both of these sites (Holkham and Wollaton Hall) were online-only surveys suggests these examples may have been limited by survey group and response. Further research is needed on locations as actors.

It was apparent that the needs of screen tourists were not always being met at destinations, particularly with regards to information about the relevant screen production. At Bampton and West Bay, for example, researchers were often questioned about the location of certain buildings, with even dedicated viewers sometimes unclear about where locations could be found. Screen tourists travel to a destination because of their interest in a film or TV drama and are keen to identify locations and know more about them. It can be difficult for visitors to navigate sites, particularly if the geography of an actual location differs significantly to its on-screen depiction – or if not all location scenes were shot in the relevant area.[49]

Providing screen tourists with useful, insightful material that can improve their experience is advised, and it is recommended that film and tourism agencies work closely to draw on the specific expertise and access inherent in both.

Further thought should also be given to maximising the spending from screen tourists. At some sites there was limited opportunities for screen tourists to buy refreshments or souvenirs.

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[48] *Movie-induced tourism: The challenge of measurement and other issues.* Ibid

[49] This is relevant at, for example, West Bay. Despite being set in a single town other parts of *Broadchurch* were actually shot elsewhere, which not all visitors realise.

However, while screen tourism can provide a real opportunity for locations, a number of negative factors should also be considered. In particular, the success of any film or television is far from guaranteed at the time the production will be shooting. Therefore hosting a production is not a guarantee of a future tourist upsurge.

While a successful production can certainly lead to a significant throughput of new tourists this can, in some smaller locations, create issues such as pressure on infrastructure. Furthermore, some sites will have a tourist profile that pre-dates any screen exposure and continuing to cater for other types of tourists alongside screen tourists needs careful consideration.

2.5. Suggestions for Further Research

This project has developed a methodology to isolate core screen tourists at dual-appeal sites, and subsequently scale up the value of day-visit spend from international visits to each location annually. With the survey aspect, this was limited to eight locations, with one-day surveys at each. There is no doubt that a more comprehensive survey of international visitors to the region, and in fact the UK as a whole, would provide more detailed evidence of the positive screen tourism effect.

To this end, it would be useful in the future to add location-based screen tourism to the IPS activities list to update the survey's 2006 findings relating to visits to film and literature locations. It is also recommended that DMOs and attractions in regions with a linked screen tourism offering include questions in their own visitor surveys to build a picture of the proportion of screen tourists being attracted – including core screen tourists who would not have visited without having experienced the destination on screen.

This project also uses the results from the eight surveys to scale up to a national figure. The lack of data regarding the number of active screen tourist locations and the general volume visitors to them meant that assumptions had to be made. Further research into the full number of 'active' locations and visitors would enable a more national value with more clarity.

Better understanding of how screen tourists discover locations and then consume them as visitors would also be desirable for maximising the opportunity in this space.

This Study has demonstrated the appeal of different types of genre that can appeal to screen tourists but more research could be undertaken to provide further insight into how, for example, horror film tourists might engage and behave differently as screen tourists to period drama tourists. One consultee suggested, for example, that cult tourists are driven by the fact they have an instant icebreaker that enables them to meet like-minded people.

Further understanding of the interaction between the consumption of cult film and television and visitations would enable deeper understanding of how cult productions perform as tourists drivers against other types of production. Other studies (Human Digital, 2014) have found that the levels of discussion around cult material, and the activities that some fans participate in (such as cosplay, or costume play) can help promote the location.

Further longitudinal assessment of the effects of screen exposure over time would be desirable so locations might better understand the tourism outlook over the coming years if featured in a successful screen product, and any tail-off in interest at other sites.

For locations, maximising the presence of screen tourists without alienating other types of tourist or diluting the authenticity of the site or other strands of its tourism offer is key. Research into best practice in terms of monetising screen tourism would enable deeper insight into achieving this and could draw together best practice from other sites.

Finally, exploring where the screen tourism sector fits within other forms of cultural tourism would enrich understanding of the UK as a global cultural hub for international visitors. Assessing how tourist interest overlaps with heritage, art, theatre, literary and music tourism would enable new insight into their itineraries and enable tourism products to be better targeted.

3. A PREDICTIVE MODEL

Screen exposure can have a transformative effect on a tourism destination – but not every location that hosts the production of a film or television drama will see an upturn in screen tourism. This section outlines the project-specific factors that locations should consider when assessing shooting requests in order to better understand screen tourism potential.

3.1. Introduction

Film and television production is a high-risk undertaking. In many cases productions are a prototype – an untested product that may or may not prove to have traction in the marketplace. Risk can be mitigated to a degree by producers adapting material with audience visibility (such as successful novels) and hiring renowned film-makers and big-name actors. However, even big-budget films with major stars can fail to connect with audiences and critics.

This means that when considering potential screen tourism levels of a project, a central factor in this – success of the film or television programme – is outside of the location's control. Nevertheless, research into the eight locations that formed the basis of this Study revealed a number of key factors that should be considered by locations when assessing projects and their potential tourism impact. While such trends are indicative – since all screen products are different – they can nevertheless be combined into a predictive model that can be used by locations to assess projects.

Clearly the model outlined in Figure 16, and the general value in Table 6, is based on findings from eight sites. Future research to widen this sample would enable a more detailed predictive model, while the creation of a location toolkit for circulation could also present case studies of best practice approaches utilised by successful destinations when assessing projects – and maximising the benefit of successful screen exposure.

3.2. Assessing Screen Tourism Potential

The following figure outlines the key factors relating to higher screen tourism potential. These are described in detail in the following sections.

Figure 16 – A Predictive Model

Visual and dramatic potential of location within the story. The site's key visual attributes, such as an exterior, should be featured. Playing a central role in drama or plot will serve to focus audience attention.

Potential of the screen product. A new entry in a successful franchise can bring strong results. A major literary adaptation will also ensure some market visibility.

Overlap with wider UK tourist offerings. Key draws for overseas tourists to the UK include its heritage, culture and countryside. A screen product with links to such elements would be desirable, particular for a location with appeal in these areas.

Positive appeal. Dark stories can attract screen tourists but they need clear audience appeal beyond their subject matter.

Likelihood of a strong release and wide international distribution. Screen products can only drive tourism if they are seen widely. Assessing the producers, financiers and distributors will point to a project having access to global distribution channels. Stars are also a factor.

Comparable projects. Locations should also look to similar projects when assessing requests.

3.2.1. Successful film franchise or television series

While many productions are prototypes others can be instalments of highly successful film franchises or television series. For locations, such links can be a strong indicator of screen tourism potential.

This is obviously most pronounced in productions with high levels of box-office success, high viewing figures and strong cultural profile. The top three screen tourism destinations in this

Study had all featured in such productions – namely, *Downton Abbey,* the first two Harry Potter films, and *Pride and Prejudice.* Clearly the biggest impact on international tourism is likely to be seen from those productions that have attained high profile in key markets such as the US – as evidenced by *Downton Abbey*.

With particularly high-profile properties there can be tourism impacts even before release – as seen by the tourists interested in *Star Wars: Episode VII – The Force Awakens* identified at Puzzlewood.

It is also notable that such productions do not necessarily require such profile in the UK. The impact of Rosamunde Pilcher adaptations produced for German television have been a prime driver in the market for German and Dutch tourists.[50]

3.2.2. Literary adaptations

Just as screen products from existing series can point to a screen tourism impact, productions based on literature can also have similar profile in the market.

Very successful works of literature will likely have a committed, engaged readership base. A major adaptation, whether for film or television, will clearly have a certain degree of appeal. Indeed, literary tourism is itself undertaken by visitors. As one study notes, literature and screen tourism have similarities, and "can even be interchanged in many ways. As with movie tourism there is a merging of the real and the imagined which gives literary places a special meaning."[51]

Two of the top three screen tourism sites for this Study demonstrate that this is relevant both for classics (*Pride and Prejudice)* and modern literature (the Harry Potter series). Screen tourism is detected for locations featured in these adaptations regardless of the fact the sites – Lyme Park and Alnwick Castle – were not actually featured in the books.

Further to this, successful literary adaptations may help drive interest in related sites, even if they were not featured in the film – as seen by press interest in Tudor sites alongside the *Wolf Hall* filming sites.

3.2.3. Visual impact and story profile

Film and television are visual media and the more impactful a location's screen exposure is, the more it is likely to drive tourism. For example, West Bay's iconic cliffs featured heavily in *Broadchurch.* As well as featuring within the plot, the cliffs were shown on numerous occasions and also featured in marketing materials.

Centrality and visibility can be key. If a location is being used for unremarkable interiors, for example, there is likely to be less scope to leave a visual impression on viewers.

Previous research by SPI has shown that it is a connection with story – whether through characters, historical period, literature, themes, or narrative – that attracts tourists rather than just the attractiveness of a location.[52]

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[50] *Stately Attraction – How Film and Television Programmes Promote Tourism in the UK*. Olsberg•SPI, August 2007

[51] *Movie-induced tourism: The challenge of measurement and other issues.* Ibid.

[52] *Stately Attraction*. Ibid.

The importance of story to tourism appeal should certainly be considered by locations when assessing the potential of shoots. All of the sites shown to attract significant core screen tourism levels in this project were part of the story, while the two sites at which no screen tourists were detected were used to double for sites in the US.

3.2.4. Intersection with other key tourist interests

According to VisitBritain, "perceived, and indeed very real, strengths of Britain's tourism offer include our cultural heritage, built heritage, contemporary culture and, to a lesser extent, countryside."[53]

Clearly, for locations able to appeal to tourists interested in these aspects of the UK a film or TV link can be a powerful added attraction (and may well have helped project powerful images of these parts of the UK abroad). Indeed, all of the survey locations can be said to have some appeal along these lines. Further appeal is created if the location and screen product's story, setting and characters overlap with other elements of tourist appeal, such as the English heritage depicted in *Downton Abbey*.

For locations, the film or TV link can help to distinguish them – as evidenced in Bampton, where several visitors described having wanted to see the Cotswolds, and decided on Bampton specifically because of the *Downton Abbey* link.

3.2.5. Positive appeal

The presence of significant screen tourism at West Bay underlines the fact that screen content does not have to be upbeat and positive to induce tourism visits.

However, despite being the story of a child's murder, *Broadchurch* was not relentlessly bleak. It featured strong, appealing lead characters (played by David Tennant and Olivia Colman) and portrayed a close-knit community that viewers may have felt drawn to.

While research has not been undertaken into screen locations that have featured in particularly dark or bleak productions it should be assumed that to function as screen tourism sites there should be clear aspects of positive appeal in the treatment of the story and the stars involved.

3.2.6. Presence of major producer, financier or distributor

While international success can be difficult to predict, the presence of a well-established financier or backer can be a pointer to quality and the potential for wide audience exposure internationally.

While not a guarantee of success, the involvement of such a company is relevant for a number of reasons. It suggests that the project will have been thoughtfully selected with a market in mind, has been well developed and will be made to a level of quality to ensure it has the best chance of success.

Of course, productions not made by larger companies can also be highly successful but track record should be considered. To look again at the *Broadchurch* example, the presence of

[53] *Overseas Visitors to Britain – Understanding Trends, Attitudes, and Characteristics*. VisitBritain, September 2010.

renowned producer Kudos and UK broadcaster ITV would suggest that the show would have clear elements of broad appeal – as indeed it proved to have.

Finally, the involvement of a leading producer, financier or distributor will also likely point to the production having access to international distribution channels. Naturally, this is key in building a global audience base.

3.3. Predictive Value Model

The eight survey sites show that in the event of hosting a successful screen production a location can see a wide range of values. In the case of the eight sites, the value from international and domestic tourists can range from £0.1 million to over £4 million annually.[54]

Using the findings from this research, the following table breaks down the generic factors for each survey site to supply an outline of the key attributes of each production, along with the broad range of value that might be stimulated by successful screen exposure of that type.

It should be noted that success is not guaranteed and the potential for inducing screen tourism is dependent on a number of complex factors outside the control of a location. The valuations below also reflect the values found at the corresponding location and have not been averaged out to reflect change in appeal over time. The Study sites were also assessing impact in different stages of a production's lifecycle, so the valuations assigned below may not relate to the first year of release. Several sites may have had other productions that will contribute to the value level outlined.

Table 6 – General Estimated Value Potential of Key Types of Production from International and Domestic Tourists

Production type	Potential annual value
Hugely successful fantasy film franchise based on record-selling book series; Family audience; site plays key location and has also been featured in other productions; site is major historical building and pre-existing draw for tourists.	£4 million
Hugely successful UK television period drama, running to multiple series; global appeal, including high profile in the US; location includes several key filming sites that play ongoing, key roles in drama and plot; location also appeals to heritage tourists and is situated in appealing region for inbound tourists.	£3 million
Successful period drama, adapted from a classic novel; Location features in iconic	£1 million

[54] While the values presented in this Study focus only on inbound tourist spend, this section presents the potential total value that locations may experience from inbound and domestic tourists combined.

scene, celebrated years after its release; location also major heritage attraction.	
Successful drama series, with strong audience appeal despite very dark themes; location plays fictional town with several – though not all – sites filmed, including iconic landscape; location also has strong pre-existing tourist appeal.	£1 million
Multiple Oscar-winning period romantic drama; location iconic and with strong pre-existing tourist appeal but did not feature as itself; location has strong heritage and countryside appeal	£0.9 million
Celebrated and enduring drama series, adapted from key 20th century English novel; site is major heritage building and key location in the series.	£0.4 million
Small countryside location with strong family appeal; production is a fantasy series with family appeal.	£0.1 million
Heritage building in regional city; featured as a key location in a major global blockbuster; no link to the actual site, having doubled for a location in the US.	£0.1 million

4. AN APPROACH TO VALUATION – STUDY METHODOLOGY

This section provides an overview of the methodology utilised in this Study, including an outline of the approach to location and screen product selection, and the surveying, data processing and valuation steps.

4.1. Introduction

In measuring value, this Study focuses on international core screen tourists. These are tourists who have travelled to a location because of its connection to a screen product or products – namely, those who said they would not have visited a location had they not seen the screen product in question, or said they would have visited but still felt the screen product was the main reason for their visit.

To better reflect these levels of commitment, the valuation took 100% of the value of those tourists who would not have visited a site without the connected screen product, and 50% of those who said it was the main factor. Other visitors, even those who said the screen production had played a comparably minor part in their decision to visit, were not valued. The findings can therefore be considered conservative.

4.2. Choice of Location

To understand the proportion of core screen tourists at filming locations the Study focuses only on locations that might attract both screen tourists and non-screen tourists. These are referred to as dual-appeal locations and are important for the understanding of how the proportion of international core screen tourists relates to the population of general international tourists, and the overall tourism at the site.

In choosing the survey locations, discussions were undertaken with Creative England and a long list of potential sites was drawn up. For the selection of the final eight the following factors were considered:

- Locations represented as much if the English regions as possible.
- They covered a broad range of content (as further explained in the following section).
- Different categories of filming locations were covered including historical buildings, countryside locations, towns, and villages.
- There was a combination of free and paid-for attractions.

Eight sites were chosen that, together, fit these criteria. Site surveys were undertaken at six locations, with online surveys at undertaken at all eight.

4.3. Choice of Screen Product

It was also important that the surveys covered a wide range of film and television drama. There are many productions associated with the survey locations chosen, including:

- Costume dramas such as *Pride and Prejudice*, *Downton Abbey*, and *Brideshead Revisited* (both film and TV adaptations).
- Big budget blockbusters like *The Dark Knight Rises* and *Jack the Giant Slayer* and the first two *Harry Potter* films.
- Children's productions like *Garfield: a Tale of Two Kitties.*
- Fantasy shows such as *Merlin* and *Atlantis*.
- Darker content such as *Broadchurch.*

- Sci-fi, such as *Doctor Who*.

While this Study does not assess longitudinal effects of screen tourism, it was also important that the screen products represented a wide timescale, with the oldest production specifically covered being from 1981 (*Brideshead Revisited).*[55] It is also noted that a number of locations did not 'play' themselves on screen.

4.4. Literature Review

The range of screen tourism literature is considerable and desk research considered a range of studies related to this field, as well as related areas such as music tourism and the appeal of the UK overseas. Research was also undertaken into official tourism statistics and survey design, as well as a large number of news articles, press releases, websites and movie maps. Previous work in this field by SPI was also revisited, including 2007's *Stately Attraction – How Film and Television Programmes Promote Tourism in the UK.* A full bibliography is included in Appendix Two.

4.5. Survey Design

Survey design was a vital part of the process, and was undertaken in consultation with Creative England and VisitEngland.

It was essential that surveys were able to capture core screen tourists as well as other key data about their visits. Respondents were therefore questioned on whether they were overseas or UK tourists. If they were in the latter category respondents were questioned on whether they were local to the survey site, or undertaking a day or overnight visit.

Respondents were asked to self-define whether they were locals or visitors, since several sites could be expected to attract locals. These were only included in the valuation if they were at a location charging admission.

As outlined in Appendix One, the surveys also gathered a range of other anonymous data on respondents including, for those identifying themselves as screen tourists, the level of importance they placed on the screen product in motivating their visit to the site on that day.

Surveys also captured key data on screen tourists including the specific films or television shows that they were interested in, and how they had discovered the location had been featured.

Data was also gathered from all respondents on screen tourism as a general pursuit – i.e. whether people felt they were more likely to visit locations because of screen links now than they had three years ago, and whether they planned to visit more in the next year.

Some surveys also included a small number of specific questions requested by the location or DMO.

4.6. Site Surveys

These were undertaken over three days between August 29th and 31st, 2014. Surveyors – in teams of three, and led by one of the report authors – spent full days at each location interviewing visitors.

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55 Though older productions may have used the locations. For example, West Bay is the site of the opening credits for BBC television series *The Fall and Rise of Reginald Perrin,* which ran from 1976 to 1979.

Interviews were conducted randomly, with surveyors speaking to as many visitors as possible throughout the day.

4.7. Online Surveys

To widen the sample size surveys were also distributed as widely as possible online using the databases of the locations or relevant DMOs. Survey links were emailed to existing databases and, in some cases, circulated on social networks.

To avoid bias, online surveys were described as general visitor surveys. They were not described as screen tourism surveys.

Since online respondents might have visited the location at any time, core screen tourists were not included in the valuation. Online results were included for the calculation of overall core screen tourist proportion, and in other, qualitative assessment areas.

4.8. Scaling Up to Annual Value

The Study utilised valuations from official tourism studies to assign to each type of tourist, namely the IPS, the Great Britain Day Visits Survey and the Great Britain Tourism Survey for domestic overnight visitors. The values assigned are outlined in Table 7.

Table 7 – Value of Individual Tourist Type

Tourist Type	Value	Source	Notes
Domestic			
Local resident	**£33.53**	Great Britain Day Visits Survey (DVS)	Value taken *from GB Day Visits 2014 October-December GB & England*. Figures cover January-December 2014 and are for Tourism Day Visits in England. Average spend calculated by dividing total value of visits over this time period by total visit volume.
Non local resident that visited for day from home			
Non local resident that visited overnight and stayed in the area	**£65.15**	Great Britain Tourism Survey (GBTS)	Value taken from Great Britain Tourism Survey Quarterly Regional Summary Q3 2014 and covers October 2013-September 2014 for England, all visits. Average spend calculated by dividing total expenditure for all tourism by total bed nights.
Non local resident that visited overnight and stayed outside the area			
International			
All	**£70.01**	International Passenger Survey (IPS)	Average spend per night for holiday visitors only.

Notes: Local residents only included in value at locations that required an entrance fee.

To estimate annual value at each location, the number of visitors on the survey day and the number of annual visitors were obtained. Some sites – those that had completed their opening season – were able to supply actual data for 2014. Others supplied an estimate for the year, or for 2013.

This visitor data gathered to prepare this valuation represents core general visitors to each site. Where relevant (and possible) the locations were asked not to include visitors to specific events, like concerts, that would likely attract a non-general visitor population.

Two sites were unable to supply visitor numbers. In order to calculate an estimate, an average of survey responses against total number of visitors on the survey day was taken for each site at which physical surveys were undertaken. This average was then used to ascertain the number of day visitors. An average proportion of day visitors to annual for the other sites was used to ascertain an annual figure.

Locations were also asked to check that the volume and type of visitors on the survey day was typical for that day.

4.8.1. Individual value of survey locations

With the core screen tourists at each site identified, the spend averages were applied to each tourist type. For tourists who said they would not have visited without the screen product 100% of their value was included. For tourists who said they would have visited but the screen product was still the main reason 50% of the value was included. An overall value was then estimated for each site.

4.9. Valuing Screen Tourism in the Rest of England

To ascertain overall value of screen tourism in England a Scaling-Up Method was used, which utilised the robust survey site valuations to project an estimate of national value.

Given a lack of data regarding the total number of dual-appeal sites that have hosted production and are also able to attract tourists it was necessary to make a number of assumptions when undertaking this process, which are outlined in detail in 2.1.6.

It should be noted that the valuations for the eight survey sites provide estimates based on detailed primary research and therefore the Scaling-Up Method is rooted in accurate and robust data. The necessary assumptions made in using this technique were also made with close consideration, where possible, to sources of data – such as official movie maps.

4.9.1. The Scaling-Up Method

This technique utilises the valuations estimated for the eight survey sites and applies them to all further dual-appeal locations in the Rest of England. However, given a lack of data on the total number of relevant locations it was necessary to estimate this total.

To be as robust as possible, a baseline valuation of 100 locations was created. This list combined the eight survey sites with 92 further filming locations assumed to be able to attract screen and general tourists. These 100 locations did not represent a top tier of screen tourism sites as such, but rather a cross-section of sites.

Each of the 92 locations was assessed and a value from the most similar survey site assigned. This process defined similarity using a number of factors:

- Whether sites had hosted the same productions – such as Highclere Castle which, like Bampton, had hosted *Downton Abbey.*
- The similarity of the productions – such as Kedleston Hall, which was assigned the same zero value as Holkham since *The Duchess* had filmed at both sites.
- The similarities of the locations to the Study sites. For example, Alice Holt Forest (*Gladiator*, *The Golden Compass*) was assigned Puzzlewood's value of zero.
- In some cases the profile of the associated screen productions was a factor. For example, while the sites were different, the value of Bampton was applied to Oxford's Bodleian Library, which has hosted such major productions as *Harry Potter*, *X-Men*, *The Golden Compass*, *Lewis* and *Inspector Morse*.

A number of the 100 locations were assigned no value, to reflect the results obtained from the eight survey sites.

This resulted in a total value for the 100 sites of £45.3 million. Since annual values were assigned individually, the average of the 92 further locations does not directly reflect the average of the eight locations.

The final step in estimating a Rest of England value was to use the value of the 100 locations to scale up to a total number of relevant locations. With no data on this total, movie maps from the BFI archive were examined, with data gathered from two movie maps published in 1995 and 1999 by the British Tourist Authority (BTA). This research uncovered around 175 film and TV drama locations, which was reduced to a list of 120 after removing duplicate sites and sites already included on the initial 100.

The BTA maps assessed a range of productions, including major hits and film and TV classics. While screen tourism will naturally be subject to a degree of churn – as viewers lose interest in certain productions and new releases attract attention – many of the locations on these lists, by their high-profile nature, may be considered to have continued relevance.

This resulted in a total of 220 potential screen tourism sites. Given that the latest BTA map was published in 1999 it was necessary to reflect the 15-year period between the publication and the survey year.

To estimate the number of new screen tourism-inducing locations to have entered the market between 1999 and 2014 the group of 120 standalone locations from the BTA move maps was assessed. With the oldest production in this dataset from 1939 (G*oodbye, Mr. Chips*) there are therefore an average of two screen tourism-inducing locations per year over the 60 years between that film's production and the publication of the BTA movie map, in 1999 (120/60).

Using this average, there would be an additional 30 productions between 1999 and 2014, leading to an overall total of potential screen tourism locations of 250. (While a number of productions from this time period were included in the group of 100 locations, no reduction was applied to the additional 30 since the BTA dataset had already had duplicates removed. Moreover, it can be considered that two locations per year is conservative, given the UK's strong production levels in the last 15 years.)

Using the average value from the initial 100 – £0.453 (£45.3 million / 100) the total Rest of England is estimated at £113 million annually (£0.453 x 250). To reflect the necessary assumptions made during the process a value range of **£100 million-£140 million** is used, with the range weighted upwards to reflect the conservative factors related to the valuation described in Section 1.5.2.

4.10. Consultations

Throughout the process a programme of consultations was undertaken. These focused largely on locations, DMOs and other relevant organisations, but also included tour operators. A full list is presented in Appendix Three.

4.11. Data Processing and Analysis

The survey process resulted in a significant amount of primary data. Result of the site and online surveys were processed using a bespoke data processing model that was designed for this project.

This enabled responses to be isolated depending on a way range of factors, including their levels of motivation as screen tourists (if applicable), and the actual group size represented by each respondent. This data was used for all aspects of the Study.

With the data analysis complete, a team brainstorm was undertaken to discuss the findings in preparation for the final report.

4.12. Report Writing

This report brings together all of the information gathered throughout this process, including data analysis and qualitative insight into screen tourism.

5. LOCATION AND PRODUCTION CASE STUDIES

Detailed research was undertaken for each survey site, assessing the location as a draw for tourists and also the screen products associated with each site, to understand their international distribution and their potential to reach audiences around the world. Where possible, location owners and/or relevant authorities were also consulted on the effects of screen tourism.

Although some sites were associated with multiple screen products, this analysis generally assessed one key screen products for each site, as identified in the following table.

This section supplies detailed overviews of each locations, drawing on individual survey data, consultations and other research.

Table 8 – Key Screen Products at Each Survey Location

Production	Production Date	Production Type	Location
Brideshead Revisited	1981	Television series	Castle Howard, Yorkshire
Broadchurch	2013	Television series	West Bay, Dorset
The Dark Knight Rises	2012	Feature film	Wollaton Hall, Nottinghamshire
Downton Abbey	2013	Television series	Bampton, Oxfordshire
Harry Potter and the Philosopher's Stone / Harry Potter and the Chamber of Secrets	2001	Feature films	Alnwick Castle, Northumberland
Merlin	2012	Television series	Puzzlewood, Gloucestershire
Pride and Prejudice	1995	Television series	Lyme Park, Cheshire
Shakespeare in Love	1998	Feature film	Holkham, Norfolk

5.1. Alnwick Castle

5.1.1. About the destination

A medieval castle located in Northumberland, in the North East of England, Alnwick is a popular visitor attraction. A paid attraction, with an adult gate ticket at £14.50, it is easily accessible by bus and train despite its rural location.

For film-makers, the castle and the surrounding parkland of Hulne Park offer a dramatic and unspoilt setting. The castle itself is extensive, with a 14th century keep surrounded by vast, walled courtyards, and an inner courtyard. The Castle also has accessible ramparts on the outer walls, a 15th century fortified gatehouse, numerous 14th-19th century towers in the outer walls, and a gun terrace with panoramic views of the surrounding landscape and River Alnwick. The interior state rooms are decorated in the lavish Italian Renaissance style, renovated in the 1850s.

Since 1964 more than 30 productions have shot at Alnwick. The castle was used as Hogwarts School of Witchcraft and Wizardry in the first two Harry Potter films – *Harry Potter and the Philosopher's Stone* (2001) and *Harry Potter and the Chamber of Secrets* (2002) – with scenes filmed at the castle including Harry's first Quidditch lesson and the crash-landing of a flying Ford Anglia. Other major productions include *Elizabeth (1998)* and *Robin Hood: Prince of Thieves* (1991). It also featured in the 2014 *Downton Abbey* Christmas special, although this was broadcast after the surveys took place.

The destination promotes itself as a screen location to visitors through its website, themed scheduled events such as the Battleaxe to Broomsticks tour and Broomstick Training sessions for children. A collection of Harry Potter merchandise is available to buy online and within the onsite shop. Northumberland Tourism promote Alnwick as 'Harry Potter's castle' in most Northumberland promotions, as well as on its website.

In addition to the screen connection, Alnwick draws visitors for a variety of reasons including the site's family history, one of the finest private art and furniture collections in England, and its gardens.

5.1.2. Profile of Harry Potter and the Philosopher's Stone

Harry Potter and the Philosopher's Stone was the second highest-grossing film of 2002 worldwide, with global box office of $975 million.[56] It premiered in the UK on 4th November 2001 and in the US on 14th November 2001, and was released by Warner Bros. in 62 territories between 4th November 2001 and 4th May 2002. The film was nominated for three Oscars and eight BAFTAs, and received 58 other award nominations and had 14 wins.

Key theatrical territories included the US ($317 million); Japan ($153 million); UK ($91 million); Germany ($67 million); France ($48 million); Spain ($24 million); Italy ($22 million); Australia ($21 million); Mexico ($17 million); and the Netherlands ($13 million).

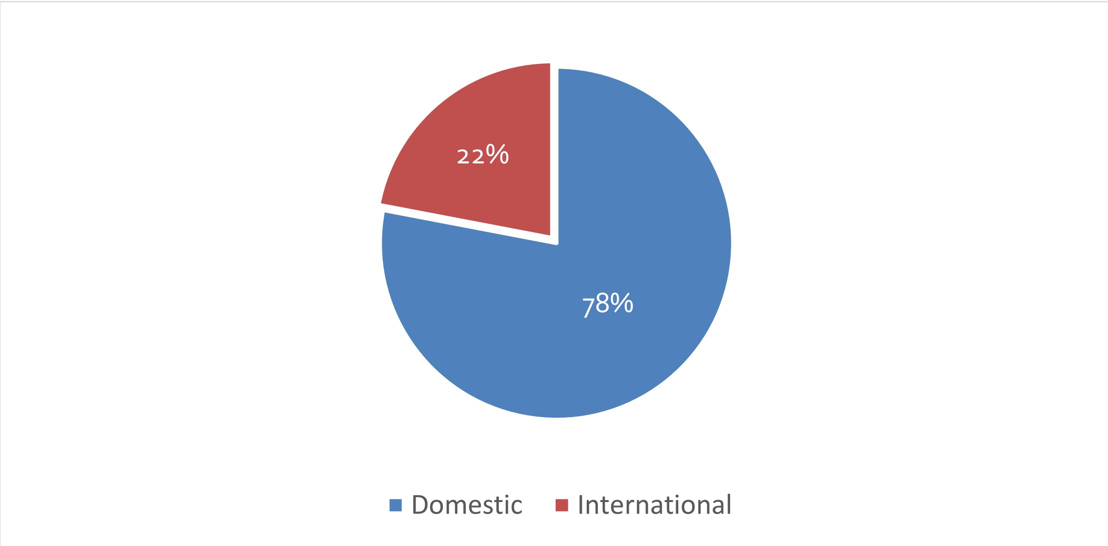
The production is still being shown on television and is available on DVD and online to rent and buy in many territories. The Harry Potter film series of eight films is still the highest-grossing franchise worldwide featuring the same key characters.

[56] In many territories it was titled *Harry Potter and the Sorcerer's Stone*.

5.1.3. Survey results

A site survey was undertaken at Alnwick Castle for this project on Saturday, 30th August, 2014, with a link to an online survey sent subsequently to consumer databases. There were 103 total respondents, representing 317 visitors when group sizes were factored in. Within the total sample, 69 were international and 248 domestic.

Figure 17 – Proportion of Domestic and International Respondents at Alnwick Castle



Looking at the total sample across online and site the proportion of screen tourists in the international and domestic visitor groups is relatively even – reflecting the broad, global appeal of Harry Potter, and the fact it is a strong driver for all visitors. As expected, these two films were key for screen tourists at Alnwick, with just 9.2% of respondents pointing to other screen products. Two respondents pointed to the link with *Blackadder* as a partial motivation.

Figure 18 – Proportion of Core Screen Tourists at Alnwick Castle within Domestic and International Groups

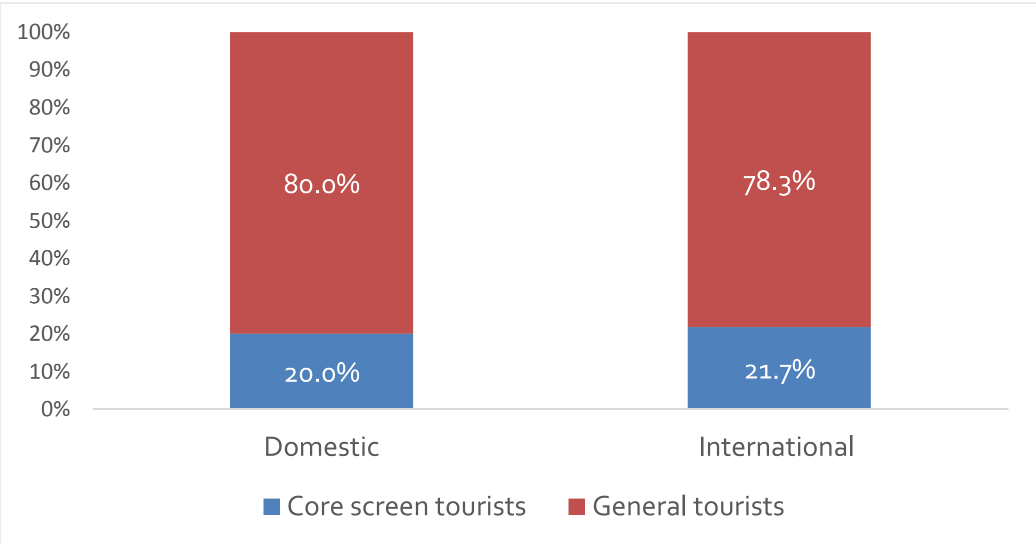
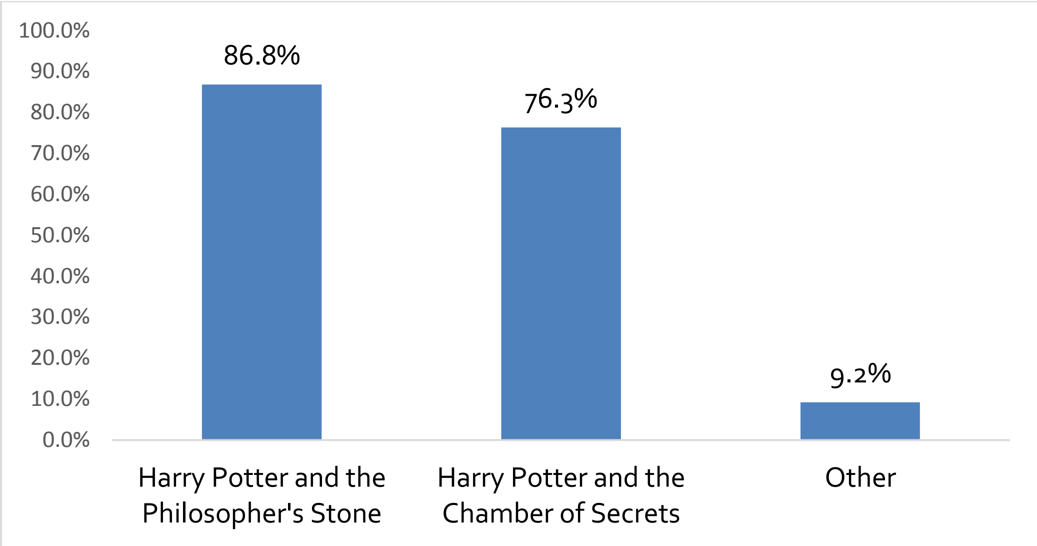


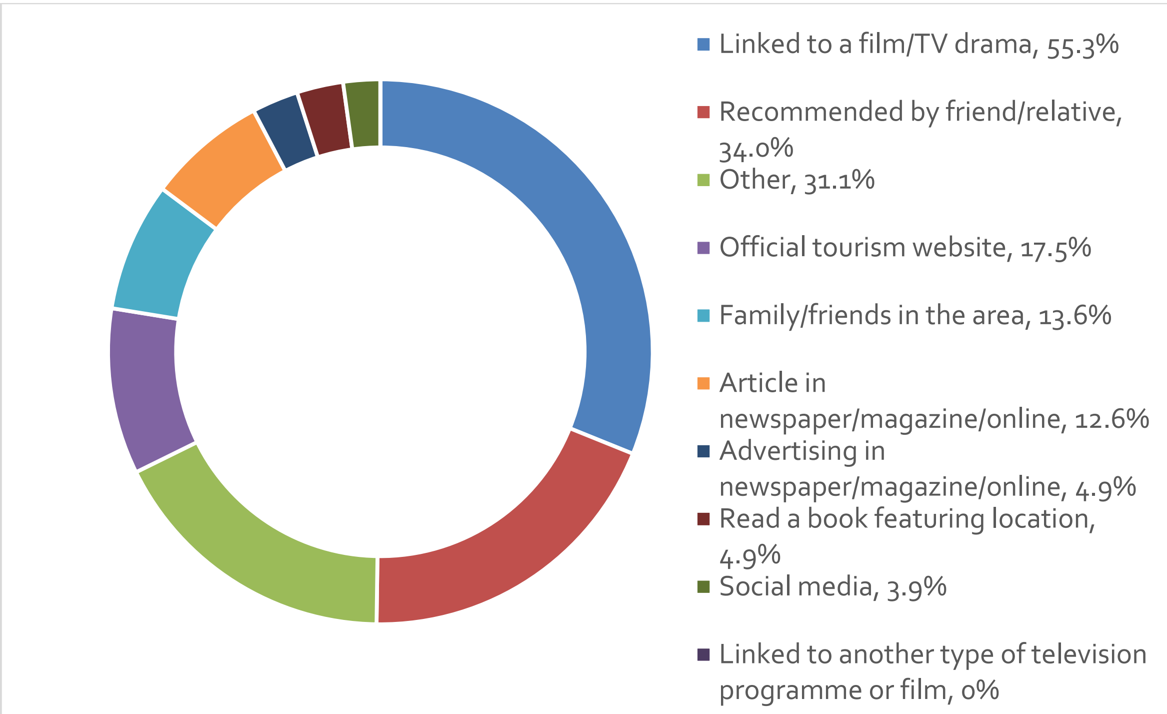
Figure 19 – "Which of these films or television dramas partly motivated your visit to Alnwick Castle?"



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

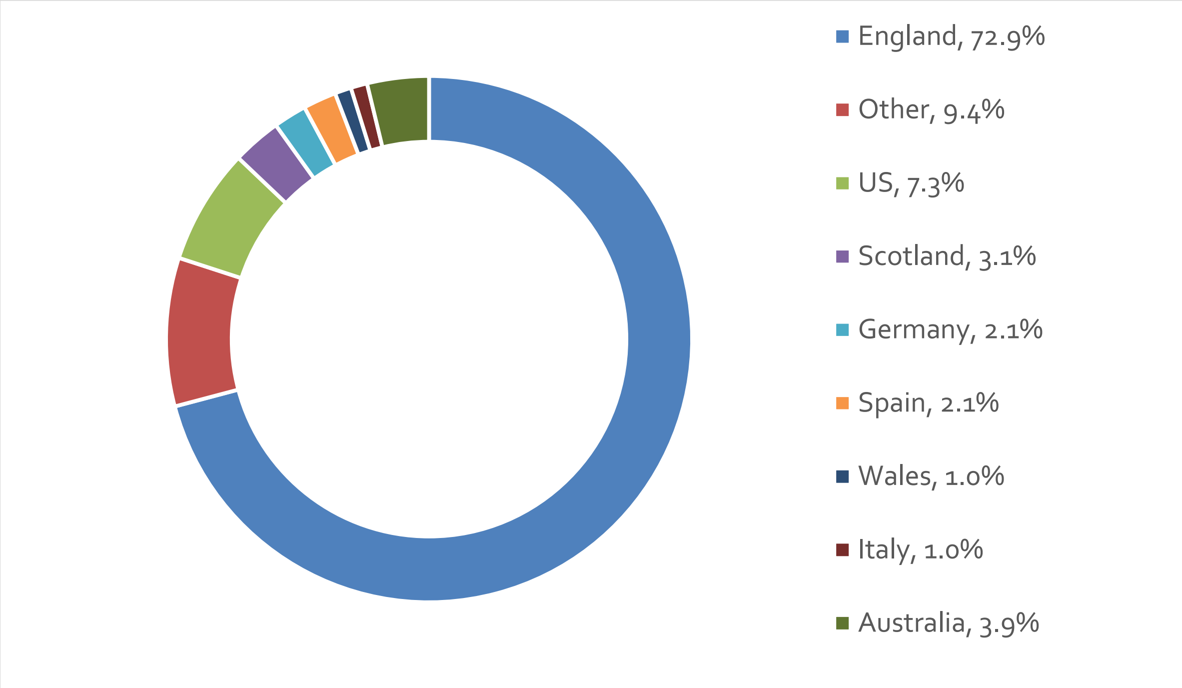
The screen link was a key reason for visitors coming to Alnwick, with 55.3% of respondents pointing to it as contributing to their decision to visit. Other factors included a recommendation by a friend or relative, or an official tourism website. Interestingly, some visitors were not aware of the screen link, with one commenting "I had no idea the castle was associated with film or television."

Figure 20 – 'Which of the following contributed to your decision to visit Alnwick Castle?'



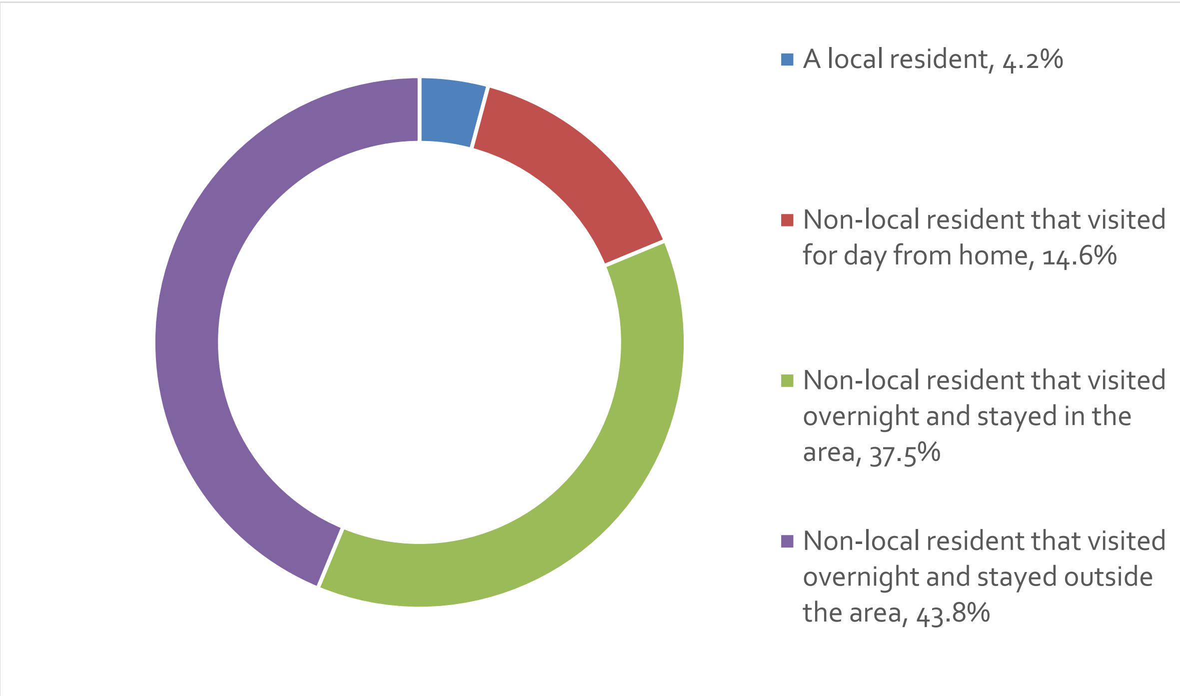
In terms of visitor profile, the largest group of respondents were English, with a number of international visitors from the US, Germany and Spain. In the 'other' category there were two visitors from Brazil and three from China.

Figure 21 – 'Where is your country of residence?'



The majority of visitors to Alnwick were non-locals staying overnight outside the area, with just 14.6% of visitors non-local residents visiting for the day from home.

Figure 22 – "Are you…?"



5.2. Bampton

5.2.1. About the destination

Bampton is a village and civil parish in West Oxfordshire. Situated in the Oxfordshire Cotswolds, the village offers film-makers a range of interesting historical buildings including 17th and 18th century houses, inns and a small early 19th century Italianate Town Hall.

Such buildings have been used extensively by *Downton Abbey*, the first production to use Bampton as a location. The village features a number of key locations, including Churchgate House, which doubles as the Crawley home; St Mary's Church, which is used as Downton parish church and an old grammar school building, which is used for Downton Cottage Hospital.

The *Downton Abbey* link is used in a number of promotional ways, including by local DMOs Experience Oxfordshire and Oxfordshire Cotswolds. Visit Oxfordshire promotes Bampton's *Downton Abbey* locations on its website, with *Downton Abbey* tours and a downloadable *Downton Abbey* location map featuring all the Oxfordshire locations featured within the series, including Bampton. Oxfordshire and Cotswolds also promote Bampton's *Downton Abbey* connection through its website and are planning a village location map. VisitBritain also promotes Bampton as a *Downton Abbey* location destination on its website along with *Downton Abbey* tours that visit Bampton.

Multiple *Downton Abbey* coach tours can visit Bampton each week, along with independent screen tourists, increasing the number of visitors to the town substantially.

The Bampton Archive works closely with a number of tour operators to synchronise the Archive's opening times with the coach tours. Supported by the actor Hugh Bonneville, who plays Lord Grantham in the TV series, the Archive is aiming to utilise the *Downton Abbey* link for the promotion of a crowdfunding campaign to raise funds for the Trust that manages the old school within which the Archive is housed, in order to undertake restoration work.

In addition to its appeal to *Downton Abbey* fans, visitors are attracted to the quaint village for its history (which pre-dates 950AD), the Anglo Saxon, medieval 16th, 17th and 18th century architecture, walks around the village and its importance as a centre for morris dancing.

5.2.2. Profile of Downton Abbey

Downton Abbey is a period TV drama phenomenon created by writer Julian Fellowes and co-produced by Carnival Films and Masterpiece. Five series have been produced with the first broadcast in the UK on ITV on 26th September 2010.

It has been released in 220 territories and has been highly popular on both ITV in the UK and PBS in the US, and subsequently became the most successful British costume drama series since *Brideshead Revisited* in 1981. By the third series, it had become one of the most widely watched television drama shows in the world seen by an estimated 120 million people.

According to BARB data its UK audience in 2013 was 9.75 million. Viewer demographics show 67.6% are female and 40.4% are over 65.

To date, *Downton Abbey* has received 180 award nominations, winning 40, and was recognised by the Guinness World Records as the most critically acclaimed English-language television series of 2011.

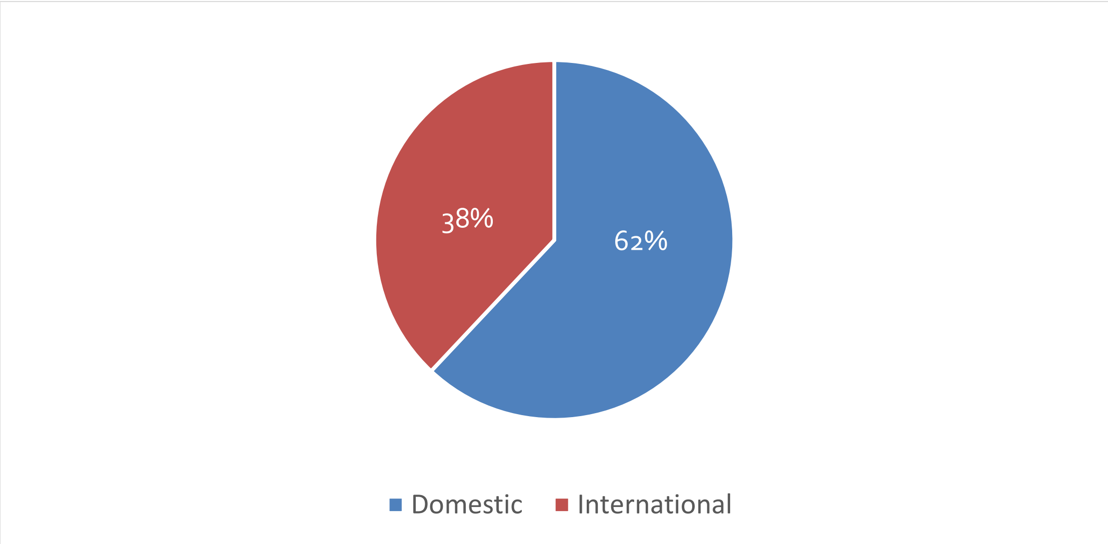
Awards include the 2012 Golden Globe for Best Mini-Series, the 2013 and 2014 Screen Actors Guild Awards for Best Ensemble, and 11 Primetime Emmys for the first four series. It has the distinction of being the most nominated international television programme in Primetime Emmy history with 39 nominations over the first three series.

As well as broadcast, *Downton Abbey* is available on DVD, Blu-ray and VOD. Amazon reported that two days before the UK premiere of the second series, the first series of *Downton Abbey* had become the highest selling DVD box set on the online retailer's website of all time, surpassing popular US programmes such as *The Sopranos*, *Friends* and *The Wire*.

5.2.3. Survey results

A site survey was undertaken at Bampton for this project on Sunday, 31st August, 2014, with a link to an online survey also sent to consumer databases. There were 62 total respondents, representing 177 visitors when group sizes were factored in. Within the total sample, 67 were international and 110 domestic.

Figure 23 – Proportion of Domestic and International Respondents at Bampton

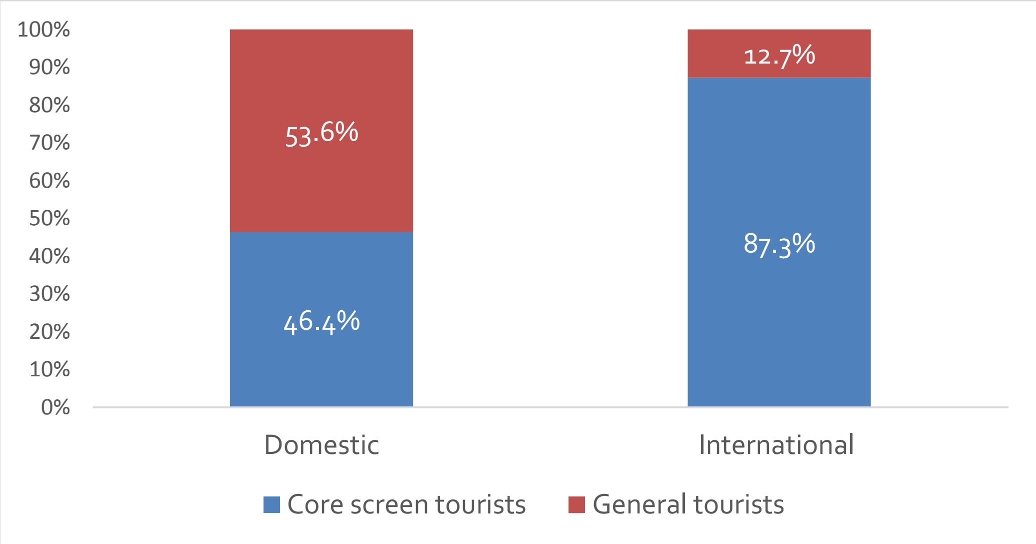


Looking at the total survey sample, including site and online, the majority of international respondents – 87.3% – were core screen tourists. This reflects the global appeal of the series, but also the fact that Bampton, like Highclere Castle, has become an essential stop for screen tourists. At least one coach of international visitors arrived in the village on the day of the survey, and several international respondents had also travelled independently, or with a guide, to the village. Others were also visiting as part of a trip to Highclere Castle.

The high proportion of international screen tourists shows that Bampton is unlikely to have attracted these visitors without the screen link.

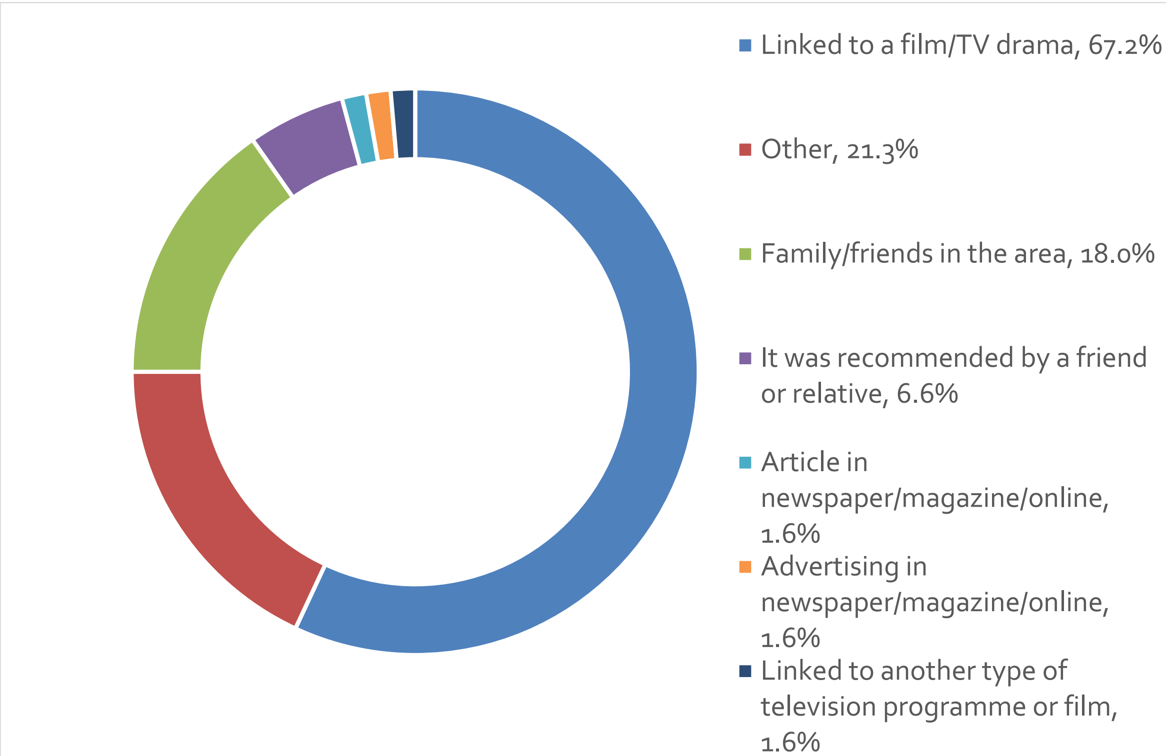
The proportion of domestic core screen tourists is lower, but still significant, underlying *Downton Abbey*'s strong appeal in the UK and overseas. At least one coach of British screen tourists arrived in the village during the survey.

Figure 24 – Proportion of Core Screen Tourists at Bampton within Domestic and International groups



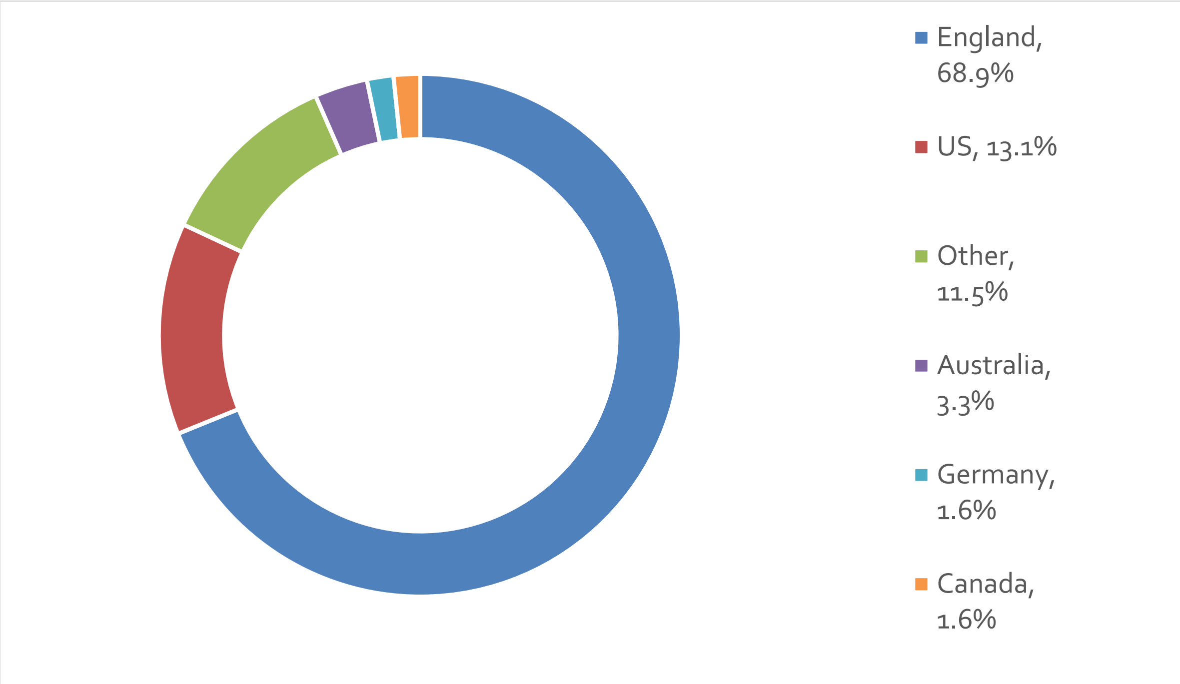
The screen link was, by some margin, a key factor for most visitors – with 67.2% of respondents acknowledging this.

Figure 25 – 'Which of the following contributed to your decision to visit Bampton?'



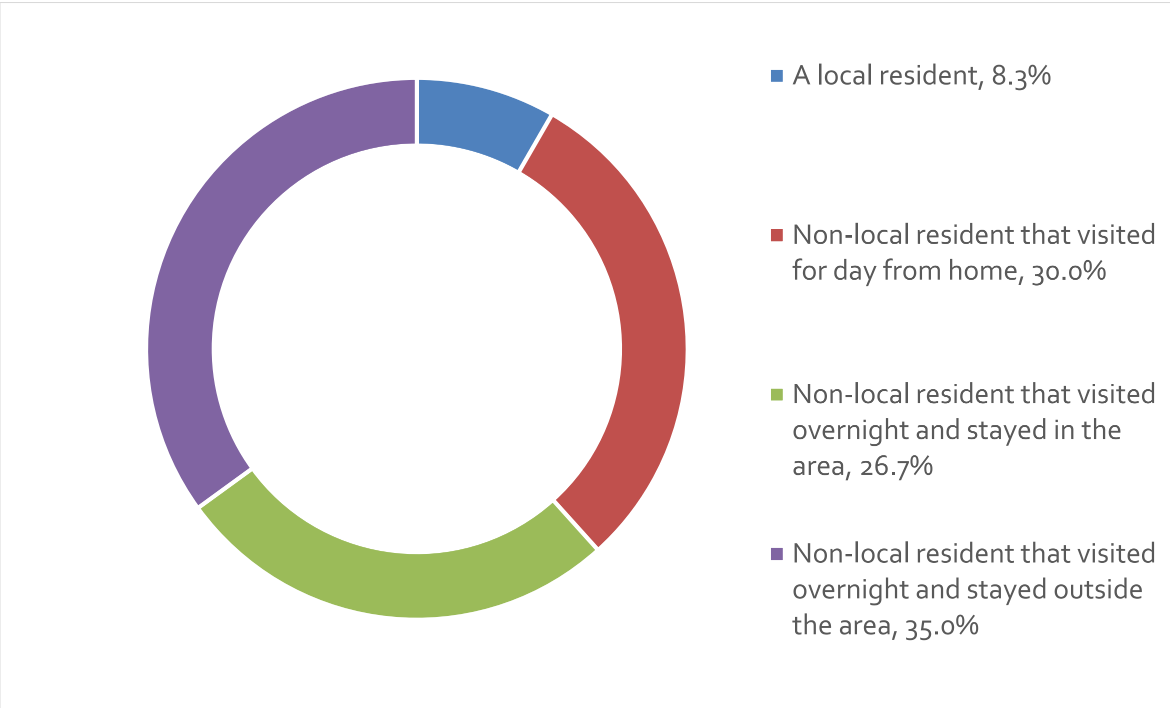
In terms of visitor profile, the largest group of respondents were English, with a high number of US tourists reflecting *Downton* Abbey's popularity. Five respondents listed Norway in 'other'.

Figure 26 – 'Where is your country of residence?'



There were a fairly high proportion of day visitors, with overnight visitors split between those staying in the area and those staying outside. This likely reflects the number of inbound visitors visiting Bampton from a base elsewhere.

Figure 27 – "Are you…?"



5.3. Castle Howard

5.3.1. Location overview

Home to the Howard family for more than 300 years, Castle Howard is an 18th century mansion set within 1,000 acres of the Howardian Hills, designated as an Area of Outstanding Natural Beauty in North Yorkshire. Castle Howard is a paid attraction, with adult house and grounds admission costing £14.

Productions are attracted by the backdrop and interiors of the house and its grounds, which contain unique features and planting. As a location Castle Howard hosted the production of classic 1981 series *Brideshead Revisited*, which utilised the exterior of Castle Howard, many of its interior rooms and painted murals, along with a range of locations within the grounds and the famous fountain. A number of other productions have also shot at Castle Howard, including: *Death Comes to Pemberley (*2013), a 2008 film adaptation of *Brideshead Revisited*, *Barry Lyndon (*1975), and *Lady L* (1965).

Brideshead Revisited has had a major tourism impact on Castle Howard. The year following the broadcast of the series visitor numbers increased from 165,000 per annum to 235,000. Simon Howard, who runs the estate, has said: "Our infrastructure couldn't cope. We just weren't expecting that sort of invasion."[57]

The site promotes the association with the TV series on its website and features a *Brideshead Revisited* exhibition, while DMO Welcome to Yorkshire promotes the location's association *Brideshead Revisited* association on its website.

In addition to the *Brideshead Revisited* link, tourists are also attracted to one of England's most beautiful houses by the Howard family history, Sir John Vanbrugh's 18th-century architecture and interior, its art collection and exhibitions as well as the its award-winning grounds.

5.3.2. Profile of Brideshead Revisited (1981)

Brideshead Revisited is a 1981 period drama TV series produced by Granada Television and commissioned by ITV. Adapted from Evelyn Waugh's 1945 novel of the same name, the TV series has been voted one of the top 100 TV programmes of all time by the BFI and Time magazine and selected in the top 50 by The Guardian newspaper. It has remained the definitive screen adaptation of the novel.

With a record-breaking production cost of £10 million, it was the first time a drama had been made on this scale and entirely on location. It turned the actors Jeremy Irons and Anthony Andrews into stars. The series premiered in the UK on ITV on 12th October 1981, where it had an average audience per episode of 11 million. The series ran for 11 episodes.

The series garnered 18 award nominations, winning seven BAFTAs, two Golden Globes and one Primetime Emmy.

According to ITV Studios Global Entertainment, *Brideshead Revisited* has received significant distribution, selling to more than 100 territories since 1981. It performs strongly on DVD, with

[57] *Brideshead Revisited: Sacred and Profane.* The Telegraph, 13th September, 2008. http://www.telegraph.co.uk/culture/film/3560534/Brideshead-Revisited-Sacred-and-profane.html

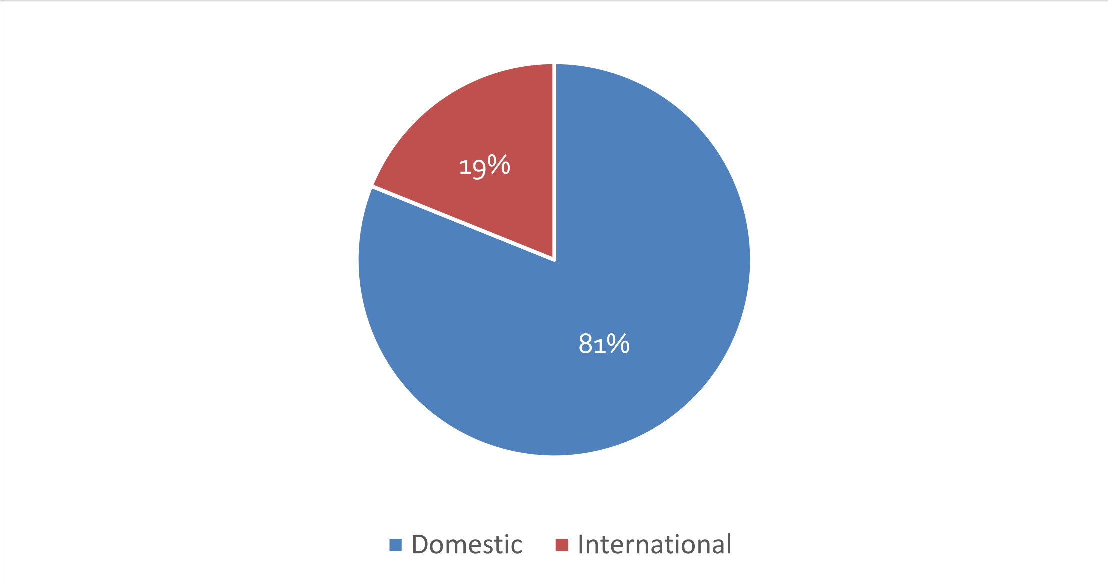
key international DVD markets led by North America, France, Germany, and Benelux. It has also been remastered for DVD.

In the UK, it was recently under licence to Sky Arts, and is now with pay-TV channel ITV Encore. The 2008 film adaptation also boosted interest in the series.

5.3.3. Survey results

A site survey was undertaken at Castle Howard on Sunday, 31st August, 2014, with a link to an online survey sent to consumer databases. There were 139 total respondents, representing 372 visitors when group sizes were factored in. Within the total sample, 70 were international and 302 domestic.

Figure 28 – Proportion of Domestic and International Respondents at Castle Howard



Looking at the total sample across online and site the proportion of screen tourists is low across both domestic and international visitors, with domestic tourists twice as likely to be core screen tourists than international visitors.

The low number of screen tourists may point to the age of *Brideshead Revisited* and the fact its effectiveness as a tourism driver has reduced somewhat over the years. Indeed, while *Brideshead Revisited* was the key production named by respondents as partly motivating their visits, others included the three-part TV drama adaptation, *Death Comes To Pemberley*, and family feature film *Garfield: A Tale of Two Kitties.*

Figure 29 – Proportion of Core Screen Tourists at Castle Howard within Domestic and International Groups

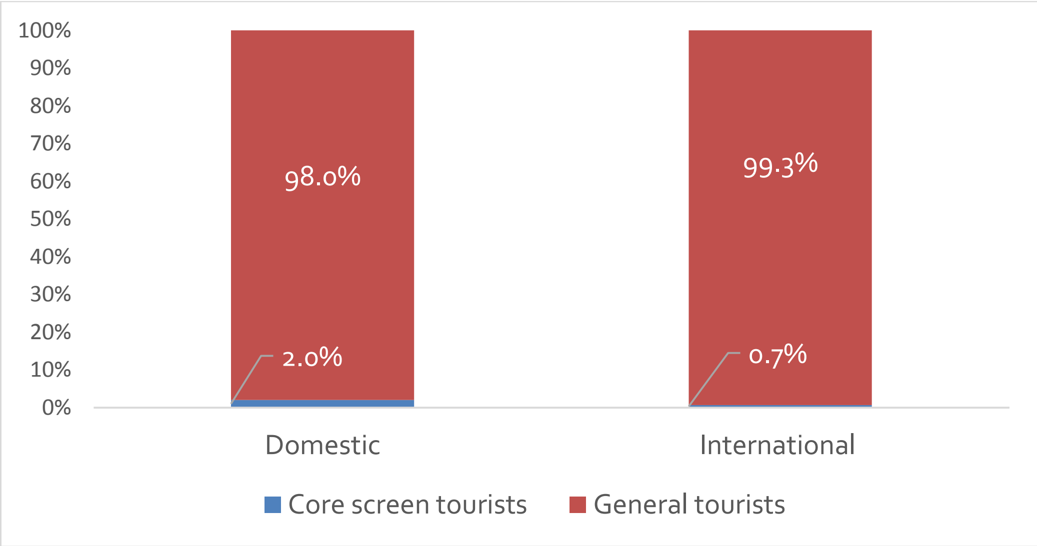
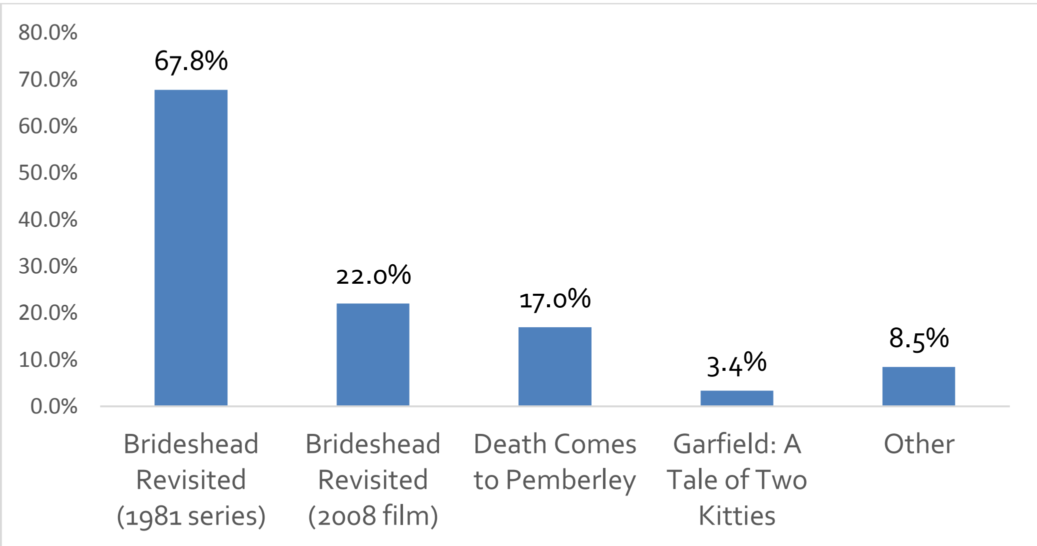


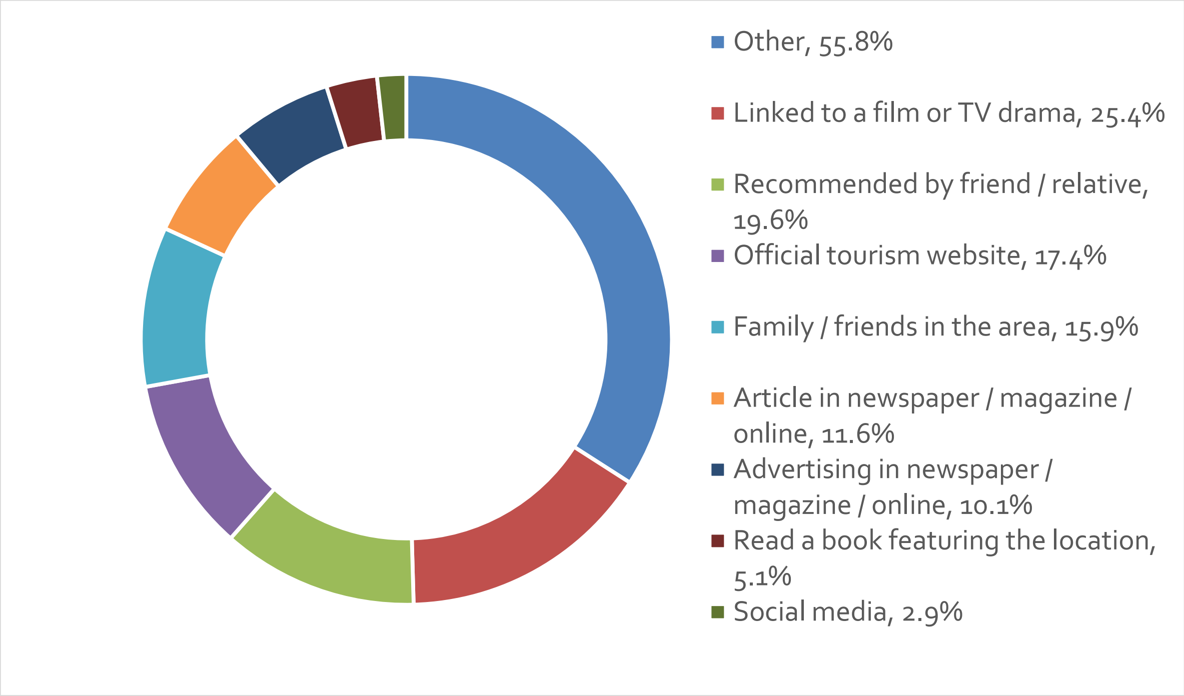
Figure 30 – "Which of these Films or television dramas partly motivated your visit to Castle Howard?"



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

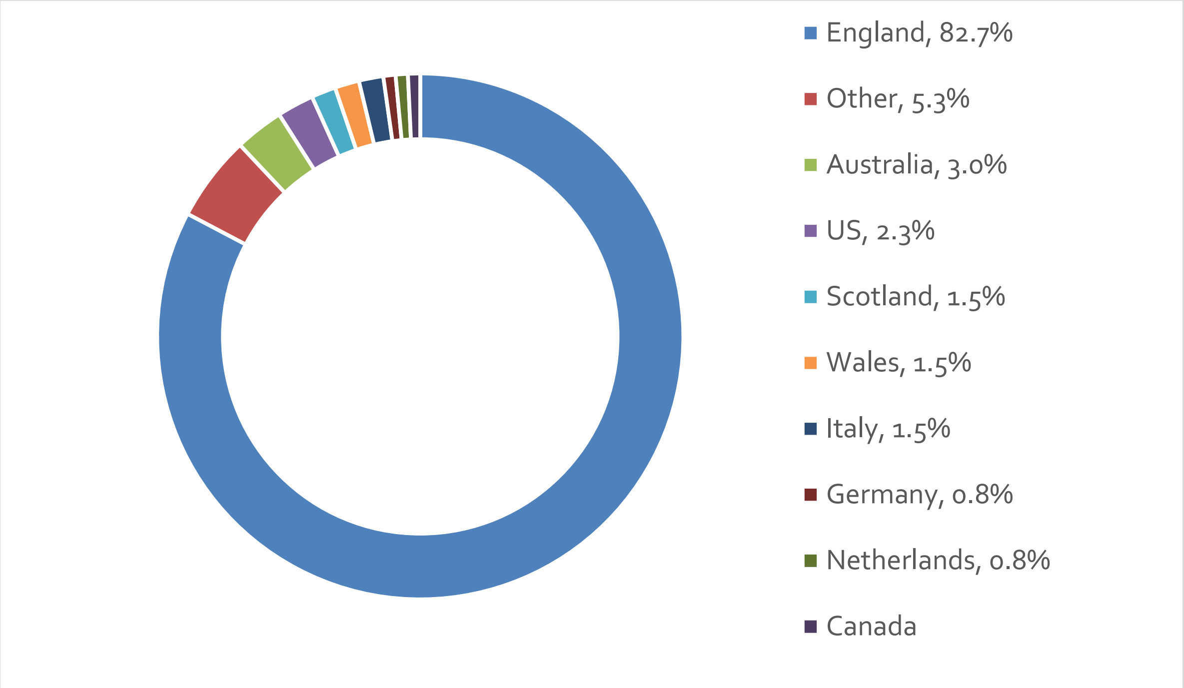
The screen link was not the main factor pointed to by respondents, with 55.8% choosing 'other'. This reflects a high degree of regular or repeat visitors, including several with an annual pass.

Figure 31 – 'Which of the following contributed to your decision to visit Castle Howard?'



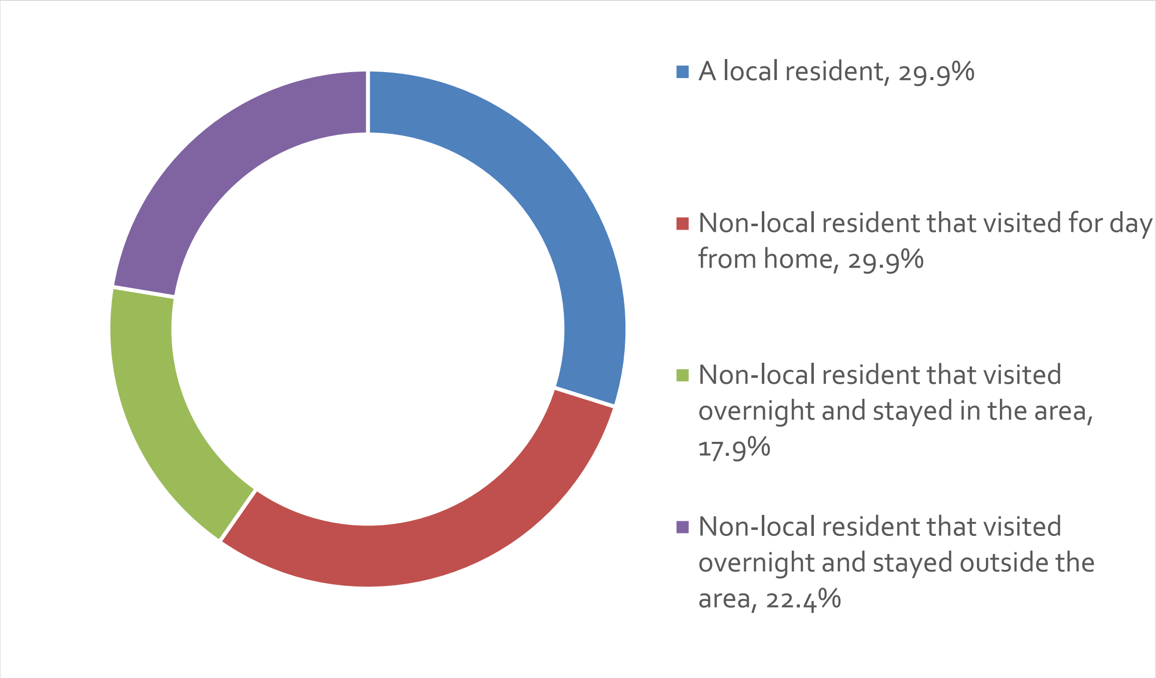
In terms of visitor profile, there was a high proportion of English visitors at Castle Howard, with a number of tourists from the US and Australia. Within the other category, there were also four respondents from China.

Figure 32 – 'Where is your country of residence?'



Castle Howard has a significant appeal to those in the area, with nearly 60% of respondents local residents, or non-local residents visiting for the day from home. This is echoed by the high number of respondents describing themselves as repeat or regular visitors.

Figure 33 – "Are you…?"



The ongoing repeat visit appeal of Castle Howard was underlined by visitor comments, with one noting that they "love the way Castle Howard has many special events throughout the year which prompt one to want to visit again to take in one that looks appealing". The evident strong appeal to repeat visitors may be a reason for the relatively low proportion of core screen tourists.

5.4. Holkham

5.4.1. Location overview

Holkham is a 25,000-acre estate on the North Norfolk coast, with an 18th-century country house and deer park at its centre, as well as a wild, sandy beach. Two miles west of Wells-next-the-Sea, the estate is freely accessed by walkers but there is a parking charge for the beach and park, while admission to the Hall and walled gardens is £12 for an adult.

For film-makers, Holkham offers one of the finest examples of Palladian architecture in the country. The elegant 18th century Hall offers a wide range of locations including the exterior and interior of the Hall, the follies and unusual gatehouses within the park. Holkham Beach also offers a dramatic setting, while Wells Beach offers a number of brightly coloured beach huts.

Holkham Beach was featured in the closing scene of *Shakespeare in Love*, with Gwyneth Paltrow, doubling for the US. A number of other productions have also used the estate, including *The Duchess* (2008). This period drama used Holkham Hall to recreate the interior of Devonshire House, the London residence of the Duke of Devonshire which no longer exists. The Marble Hall and great saloon also featured in many of the film's scenes. ITV's *Kingdom* (2007-2008), and BBC drama *The Lost Prince* (2003) have also shot at Holkham.

Holkham Estate undertakes low-key promotion of the association with *Shakespeare in Love* on its website. The Membership of the Treasure Houses Group, Historic Houses Association also promote the connection to *Shakespeare in Love*. DMOs North Norfolk and Visit Norfolk promote the Holkham Estate's screen links to tourists through their online and website promotions.

The estate has a high tourism profile, with its Hall, beach and grounds attracting walkers, bird watchers, art, culture and nature lovers as well as some screen tourists.

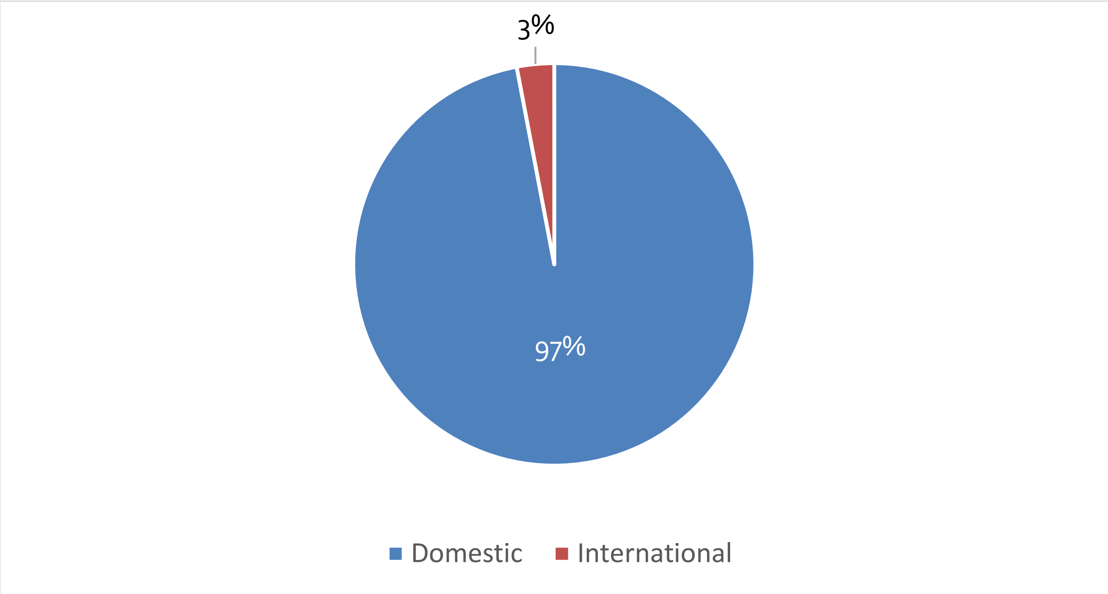
5.4.2. Profile of Shakespeare in Love

Shakespeare in Love is a 1998 UK-US romantic drama directed by John Madden and written by Marc Norman and Tom Stoppard. It was the ninth highest-grossing film of 1998. Released in 48 territories worldwide to critical acclaim, the film's worldwide box office reached $289.3 million ($100.3 million in the US, $33.2 million in the UK, and $155.8 million in the rest of the world). *Shakespeare in Love* won seven Oscars and three BAFTAs.

5.4.3. Survey results

An online visitor survey saw 86 total respondents, representing 238 visitors when group sizes were factored in. Within the total sample, seven visitors were international and 231 domestic.

Figure 34 – Proportion of Domestic and International Respondents at Holkham



Within this sample, no core international tourists were detected, though this is very likely related to the low international response rate. Assessment of the domestic group shows a relatively low proportion of core domestic screen tourists, at just 2.6%.

This proportion points to the wide-ranging offer of Holkham, and its popularity with walkers and other types of visitors.

Figure 35 – Proportion of Core Screen Tourists at Holkham within Domestic and International Groups

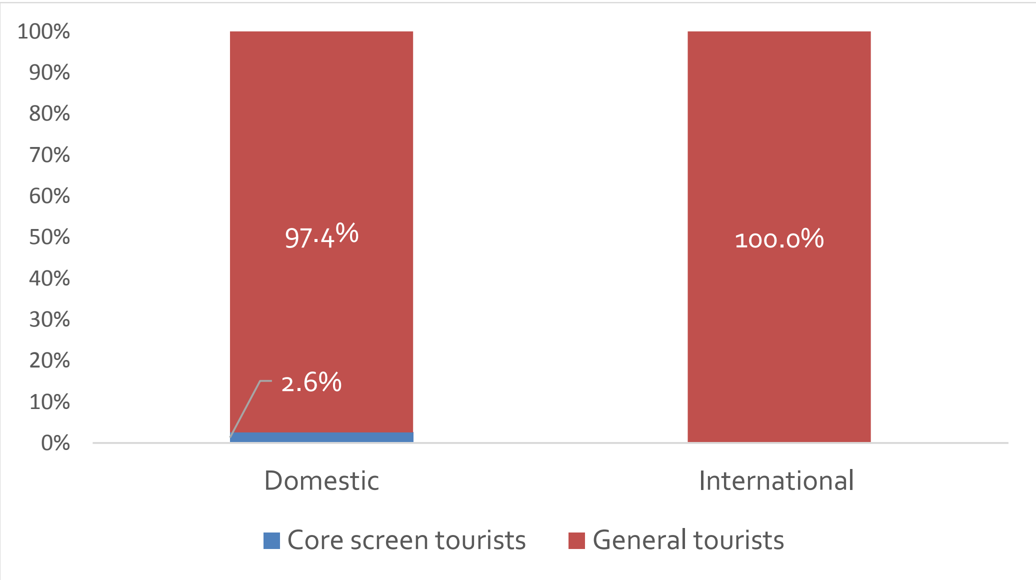
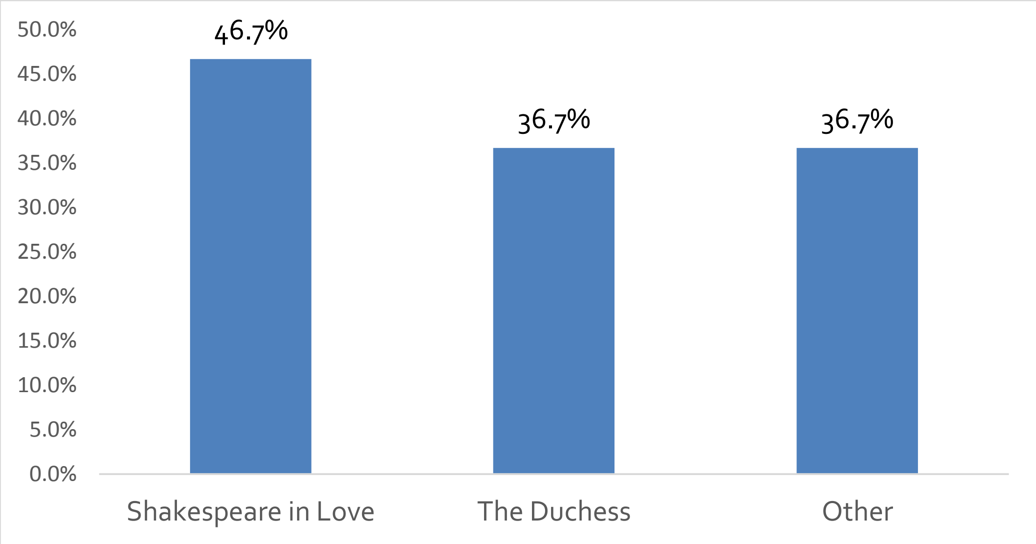


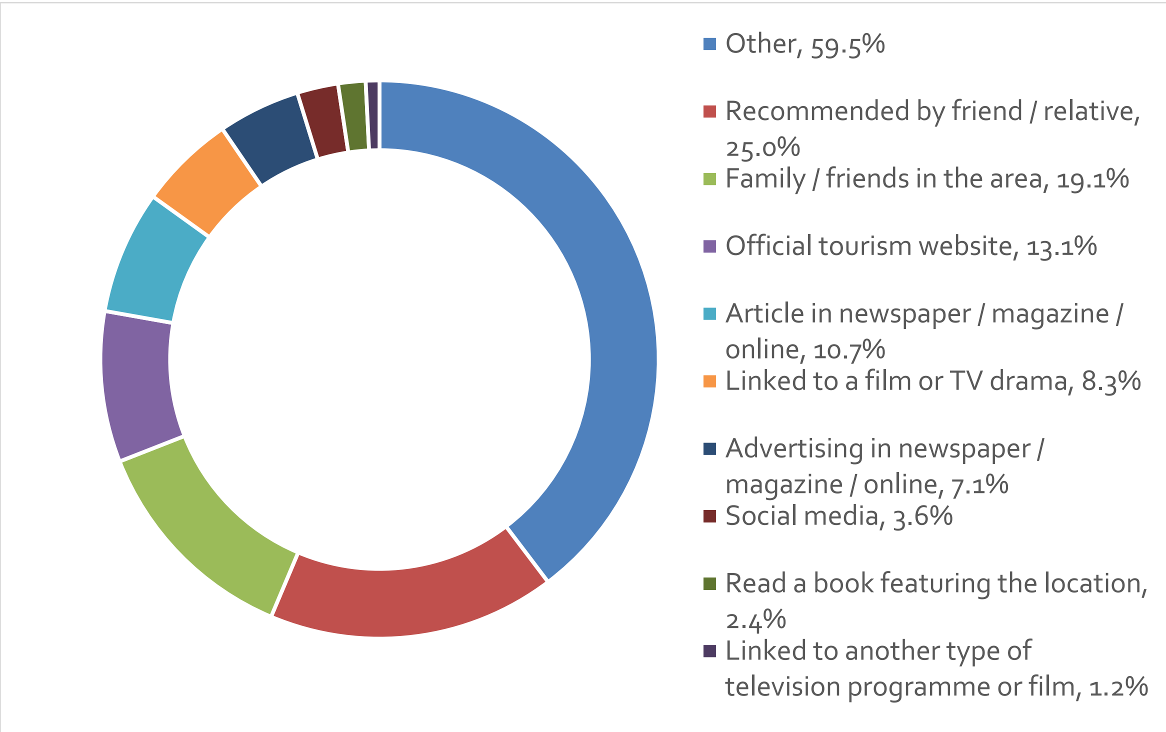
Figure 36 – 'Which of these films or television dramas partly motivated your visit to Holkham?'



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

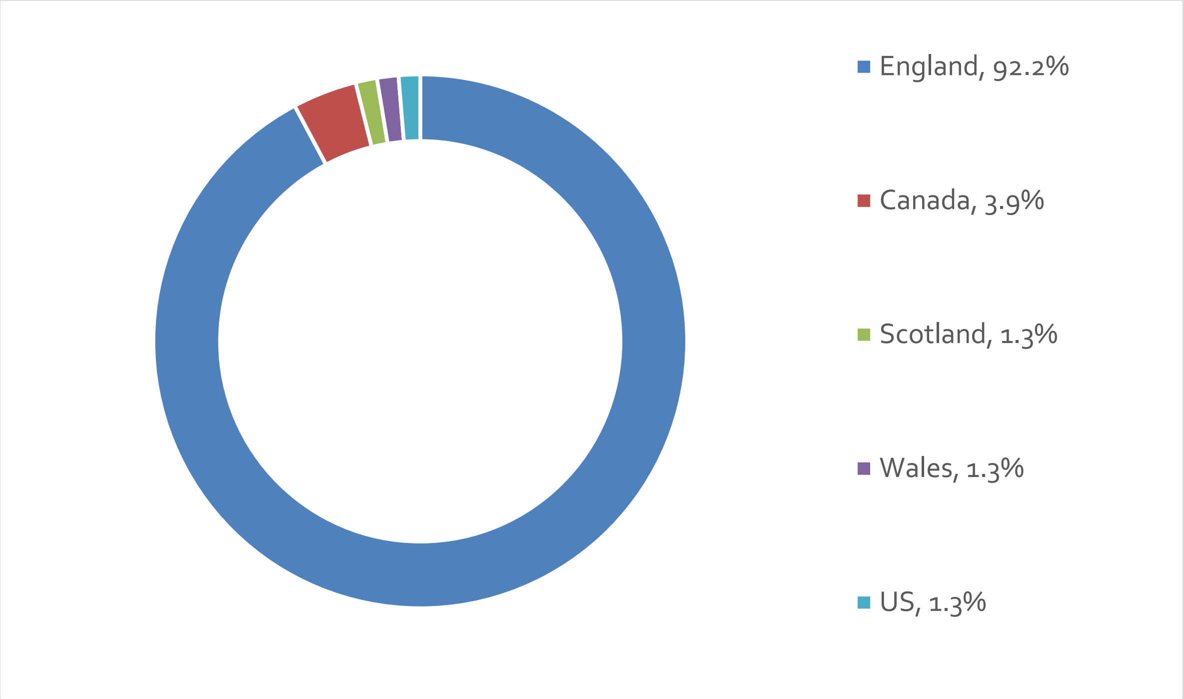
Reflecting this low proportion of screen tourists are the factors listed by respondents when deciding to visit Holkham. This showed the influence of family and friends, official tourism websites and a print or online media article. Analysis of leading factor – 'other' – showed a high degree of repeat visits, and pointed to the site's popularity with dog walkers.

Figure 37 – 'Which of the following contributed to your decision to visit Holkham?'



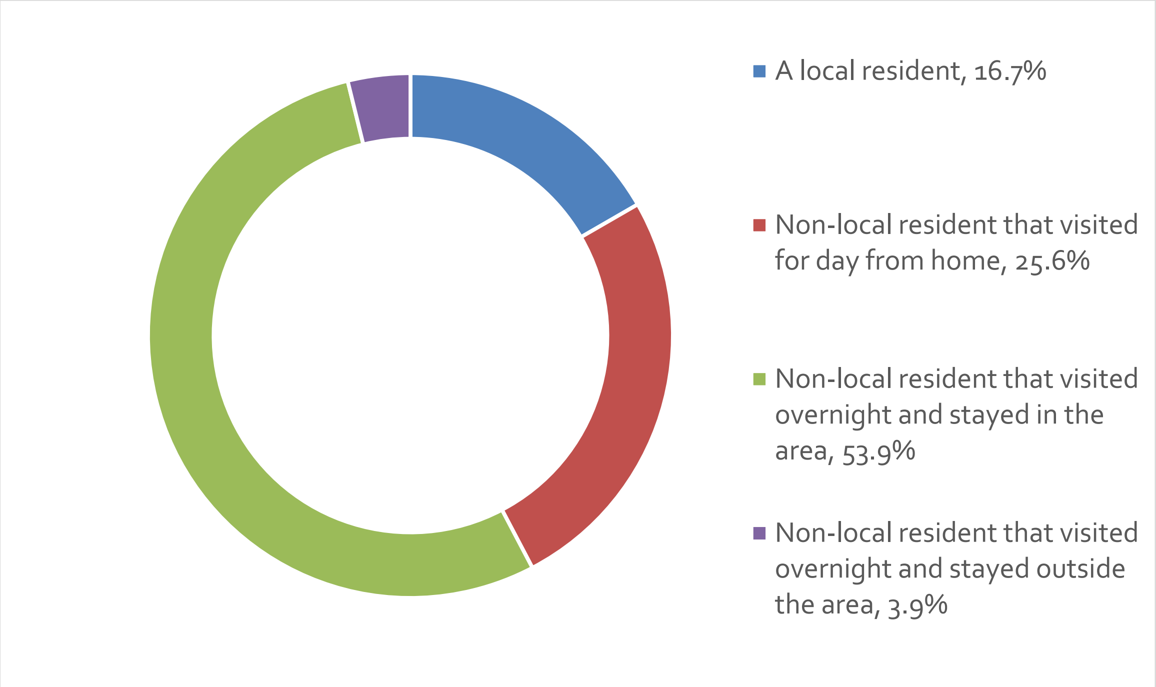
Given the evidence of repeat visitors, it is unsurprising that English visitors make up the largest group of respondents, at 92.21%.

Figure 38 – 'Where is your country of residence?'



The fact that the largest group of respondents – 53.9% – were non-locals visiting overnight and staying in the area underlines North Norfolk's strong holiday appeal.

Figure 39 – "Are you…?"



5.5. Lyme Park

5.5.1. Location overview

Lyme Park is a National Trust-owned and managed house and garden in Cheshire, on the edge of the Peak District in North West England. An adult ticket to the house and grounds costs £9.90.

As a filming destination, Lyme Park offers impressive architecture and decorative interiors along with a lake, park, gardens and a herd of deer.

Lyme Hall doubled as Mr. Darcy's home, Pemberley, in the 1995 BBC series *Pride and Prejudice*. The lake was used for an iconic scene in which Colin Firth emerged from the water. Other productions that have used Lyme Park as a location are BAFTA-nominated BBC drama series *The Village* (2014) and feature film *The Awakening* (2011), in which the imposing hall is transformed into a haunted boarding school.

Nearly 30 years on, the association with *Pride and Prejudice* is still promoted by the location. Between November 2013 and February 2014 Lyme Park celebrated the 200th anniversary of the publication of the novel, and the use of the hall as Mr. Darcy's home by hosting a winter exhibition, The Only Way is Pemberley, which included eight of the original costumes from the series, including the shirt worn by Colin Firth in the famous lake scene and Elizabeth Bennet's wedding dress as worn by Jennifer Ehle. Activities included Regency dancing; tasting Regency food; a chance to meet experts from the Jane Austen Society; and 'behind the scenes' memories of the filming of the BBC serial at Lyme. Devotees could watch a re-run of the episodes of the serial on DVD, and walk the Pemberley Trail across Lyme estate looking at the various locations used in the TV adaptation. In 2013, a statue of Colin Firth as Mr. Darcy was erected in the lake.

DMOs Marketing Cheshire and Visit Peaks and Derbyshire both promote Lyme Park and its connection to the *Pride and Prejudice* series, as well as special events relating to the production hosted at the location through their websites

In addition to the lake from which Mr. Darcy emerged in *Pride and Prejudice*, Lyme Park also draws tourists for the architecture and lavish interiors of the Hall, and the 1300-acre estate's walks and gardens.

5.5.2. Profile of Pride and Prejudice

Pride and Prejudice is a six-episode 1995 British television drama series, adapted by Andrew Davies from Jane Austen's novel. BBC One first broadcast the 55-minute episodes from 24th September to 29th October in 1995.

In the UK, 10 to 11 million people watched each episode of the first broadcast transmission with the final episode taking a 40% market share of all shows broadcast in the same time slot.

The series was a BBC production part-funded by the A&E Network in the US. The latter aired the serial in the US as double episodes on three consecutive nights beginning 14th January 1996.

A huge popular and critical success, *Pride and Prejudice* shot Colin Firth to stardom and received a number of awards, including a BAFTA for best actress for Jennifer Ehle and a Primetime Emmy for Outstanding Costume Design for a Miniseries or a Special.

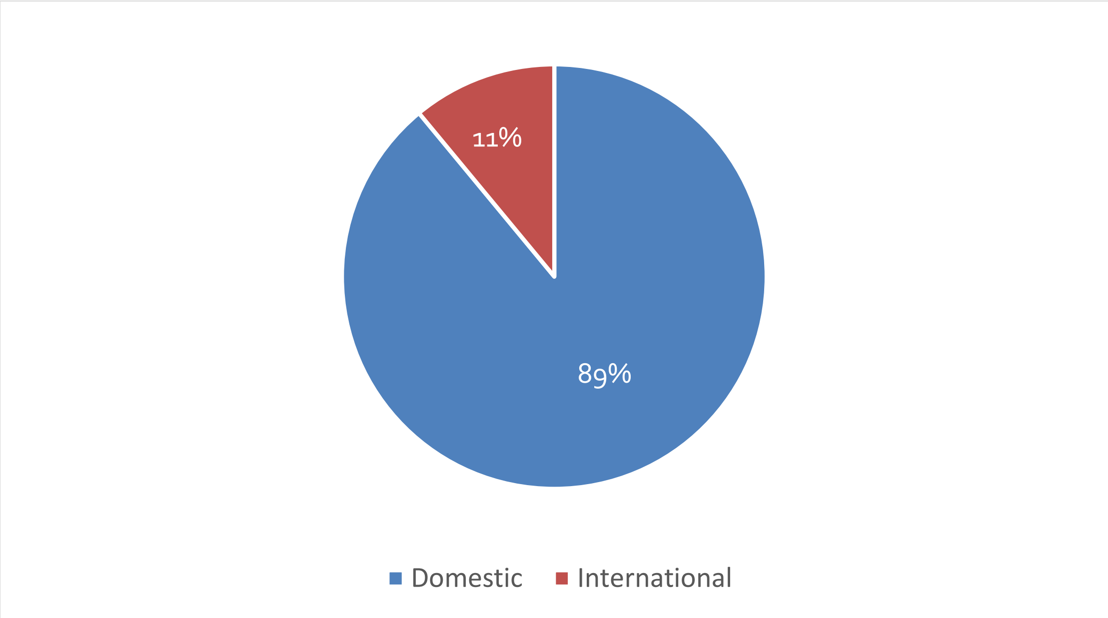
The VHS edition of the series was released in the UK the week the final episode was transmitted. All 12,000 copies of the double-video set sold within two hours, with 70,000 copies sold by the end of the first week.[58] Over 200,000 units sold within the first year of the original broadcast, the first time a video release of a TV series had sold in such large numbers.[59]

The series has been released on DVD four times. The BBC undertook a high-definition transfer from the original negatives and released Blu-ray and a restored DVD version in 2009. The series still available on Blu-ray, DVD and VOD.

5.5.3. *Survey results*

A site survey was undertaken at Lyme Park on Friday, 29th August, 2014, with a link to an online survey sent to consumer databases. There were 75 total respondents, representing 193 visitors when group sizes were factored in. Within the total sample, 21 were international and 172 domestic.

Figure 40 – Proportion of Domestic and International Respondents at Lyme Park



While the proportion of international tourists was low compared with domestic, those inbound visitors were far more likely to have visited Lyme Park because of its screen links, with over 28% core screen tourists. The site still attracted a considerable number of domestic core screen tourists, at 6.4%, though this comparatively lower proportion reflects the high number of locals and regular UK visitors identified at the site.

Despite its age, *Pride and Prejudice* is clearly still a big driver with 90.48% of screen tourists pointing to the series as partly motivating their visit. *The Village* was also a factor named by 21.4% of screen tourists, while *The Awakening* was named by 7.14%. Two respondents pointed to 2014 BBC drama series *Our Zoo.*

58 *BBC cashes in as Darcy Phenomenon has nation in a swoon*. The Independent, 29th October, 1995.

59 *2 Entertain in March*, DVD Times, 26th February 2009.

Figure 41 – Proportion of Core Screen Tourists at Lyme Park within Domestic and International Groups

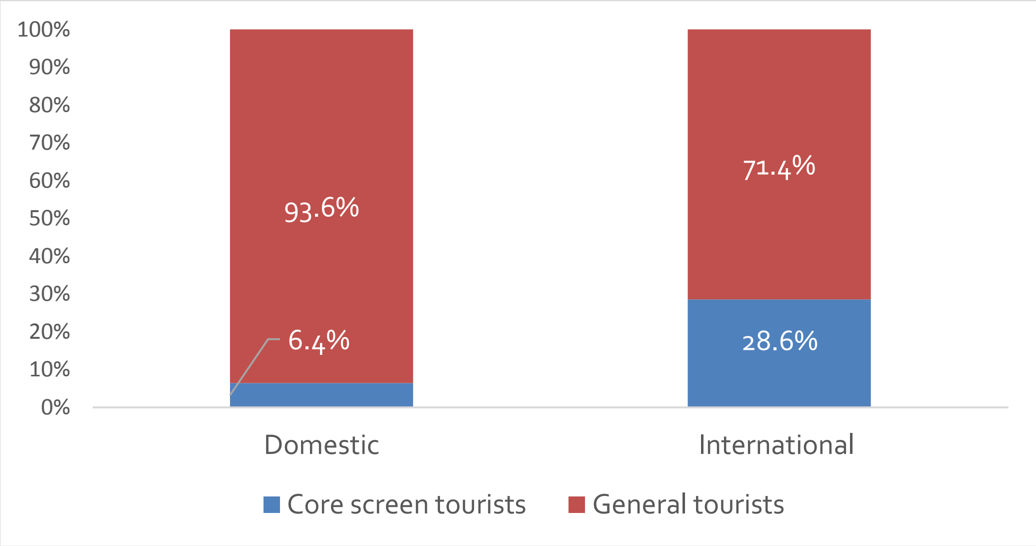
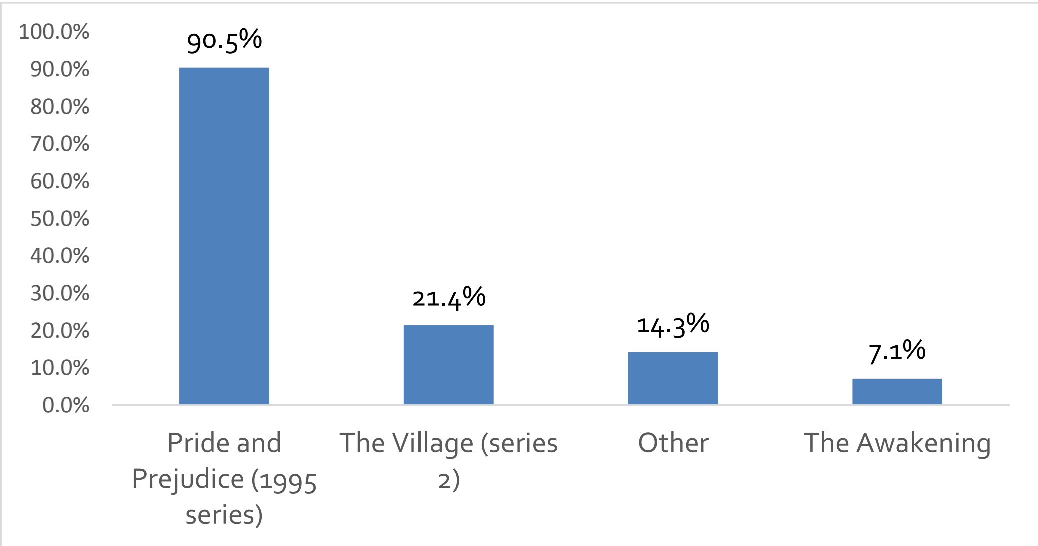


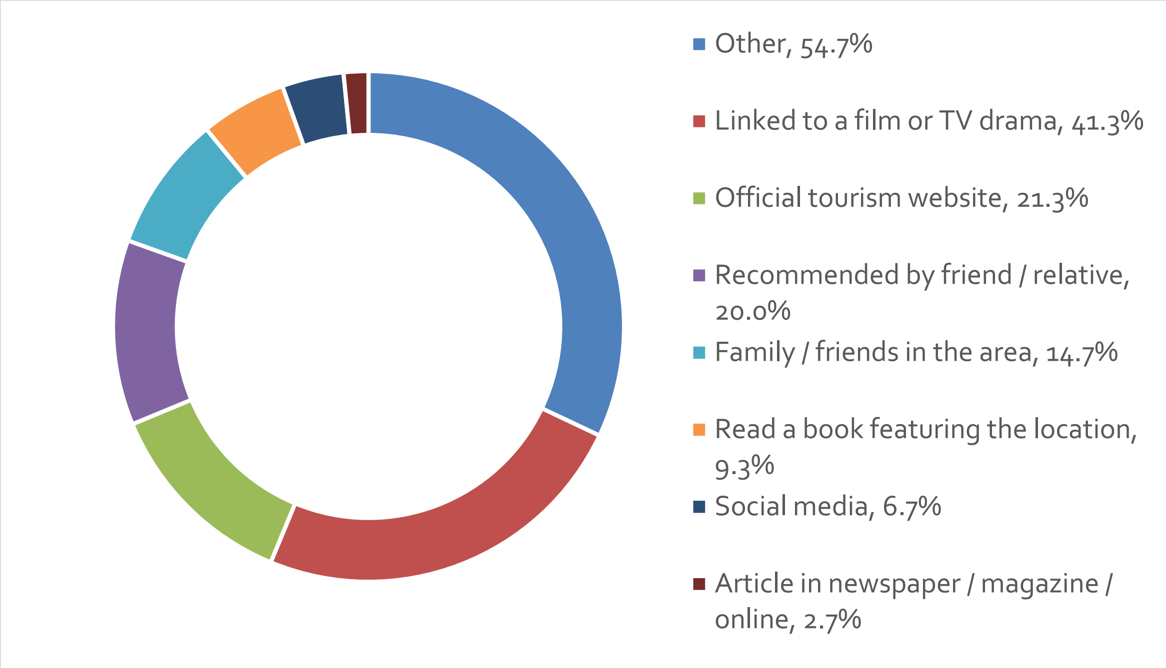
Figure 42 – "Which of these films or television dramas partly motivated your visit to Lyme Park?"



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

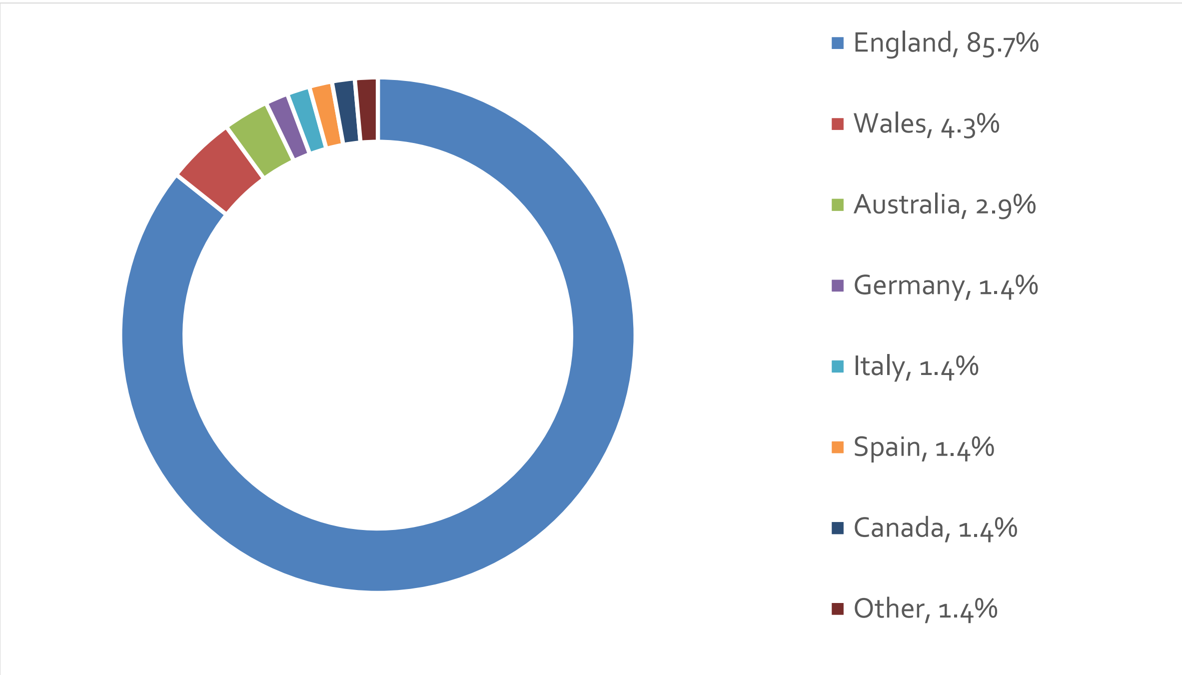
Reflecting the level of interest in *Pride and Prejudice* and other productions the screen link was named by 41.3% of visitors as contributing to their decision to visit. Recommendations and an official tourist website were also key factors. A significant portion pointed to 'other' factors, which mainly reflects locals, repeat visitors and National Trust members. As one respondent noted here: 'It has always been part of my life'.

Figure 43 – 'Which of the following contributed to your decision to visit Lyme Park?'



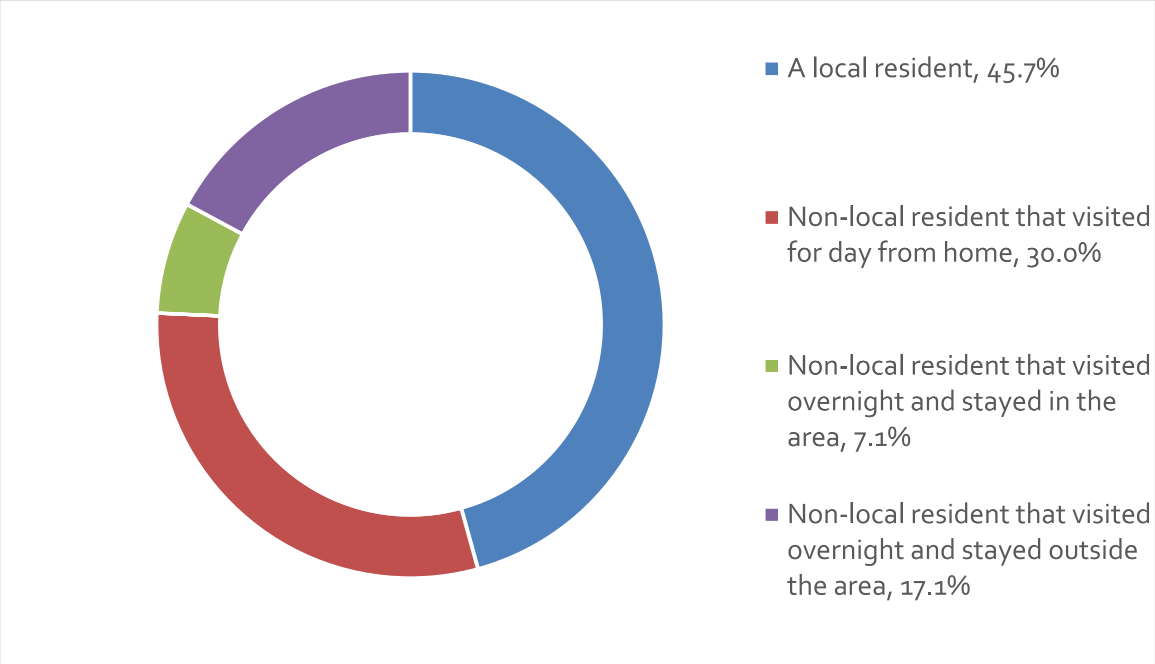
In terms of international respondents, Australia was the leading territory. There were no respondents from the US.

Figure 44 – 'Where is your country of residence?'



Lyme Park has significant appeal to locals and repeat visitors. Over 75% of respondents defined themselves as locals or day visitors from home. Fewer than 25% of respondents were staying overnight, whether in or outside the area.

Figure 45 – "Are you…?"



5.6. Puzzlewood

5.6.1. Location overview

Puzzlewood is a unique forest located in the Forest of Dean in Gloucestershire, South West England. Puzzlewood is a paid attraction, with an adult ticket costing £6.50.

Described as a beautiful and magical place by one producer, the atmospheric 14-acre ancient woodland is particularly appealing for film-makers with its extraordinary trees, caves and rock formations. Author JRR Tolkien's Middle Earth is also said to have been inspired by Puzzlewood.

Puzzlewood has hosted a number of major features and television series, particularly in the fantasy and sci-fi genres. Recent shoots include *Merlin* and *Atlantis*; *Doctor Who*, with the 2013 Christmas special featuring a snow-covered Puzzlewood inhabited by the deadly Weeping Angels; *Da Vinci's Demons; Jack the Giant Slayer;* and *Wizards vs Aliens*. It has also hosted children's programmes and other types of shows, such as *Countryfile* and *Springwatch*.

Puzzlewood itself, and DMOs the Forest of Dean and Wye Valley and Visit Gloucestershire undertake limited promotions to attract screen tourists – primarily on their websites. Puzzlewood also undertakes some on-site screen promotions.

In addition to the screen connection, Puzzlewood attracts nature enthusiasts, walkers, and families.

5.6.2. Profile of Merlin

Merlin is a fantasy adventure show created by Julian Jones, Jake Michie, Julian Murphy and Johnny Capps and produced in the UK by Shine TV with BBC Wales. The five series (65 episodes) were broadcast on BBC One from 20 September 2008 to 24 December 2012.

Every series of *Merlin* used Puzzlewood, with the forest featuring in diverse scenes such as rock falls in the location's gulleys, the location of Morganna's secret hideaway, druid camps and for many chase sequences.

In the UK, average audiences for the 2012 series were 7.1 million.[60] The show had a fairly wide appeal across all age groups, with a gender profile of 44.7% male and 55.3% female.

Merlin also has significant international profile, having been licensed to 180 countries. Popular territories include the US, France, Germany, Australia, and China. Its cult appeal also points to strong long-term popularity.

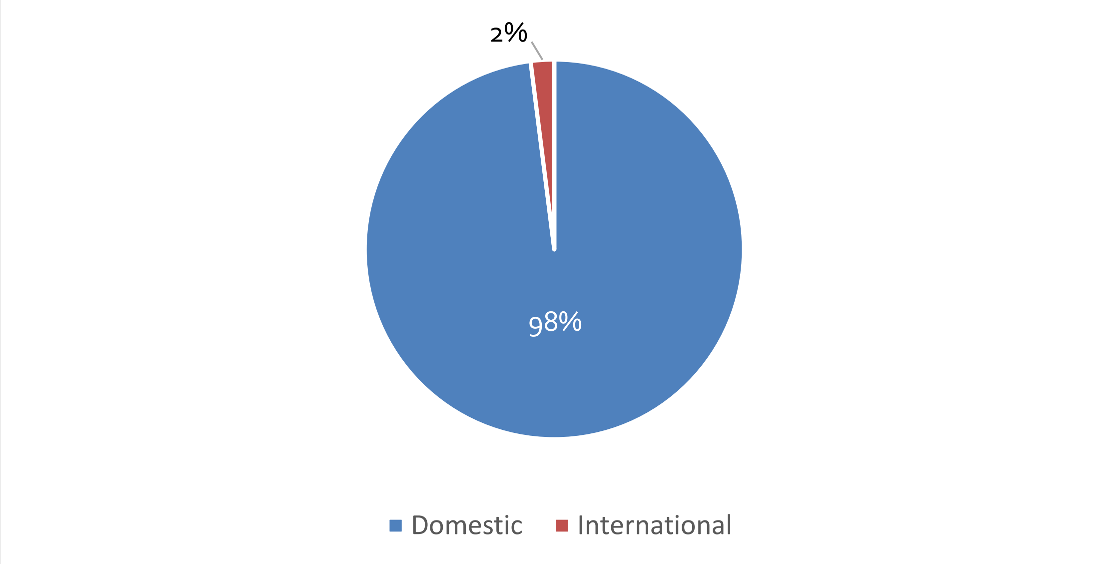
The series was critically acclaimed, and won awards including the 2011 BAFTA for Best Visual Effects.

5.6.3. Survey results

A site survey was undertaken at Puzzlewood on Saturday, 30th August, 2014, with a link to an online survey sent to consumer databases. There were 178 total respondents, representing 673 visitors when group sizes were factored in. This number reflects the number of larger family (and family-and-friends) groups identified on site. Within the total sample, the clear majority of visitors were domestic, with 662 compared with just 11 international tourists.

[60] Source: Broadcast Audience Research Board (BARB)

Figure 46 – Proportion of Domestic and International Respondents at Puzzlewood



Within the group of international visitors no core screen tourists were identified. Within the domestic group core screen tourists represented 3.8% of visitors. This is considered to be relatively low given the interest in the screen productions at Puzzlewood: while 21.05% of screen tourists said the screen links were a main reason alongside other factors, along with 34.7% who said it was a secondary reason and 41.05% who said it was a minor reason, these were not counted as core screen tourists as it was assumed they would have visited the site anyway.

Merlin was the key production for key screen tourists, with 61.1% listing it as partly motivating their visit. *Doctor Who* (47.4%), *Jack the Giant Slayer* (15.8%) and *Atlantis* (11.6%) were also popular. Seven respondents pointed to *Star Wars: Episode VII – The Force Awakens*.

Figure 47 – Proportion of Core Screen Tourists at Puzzlewood within Domestic and International Groups

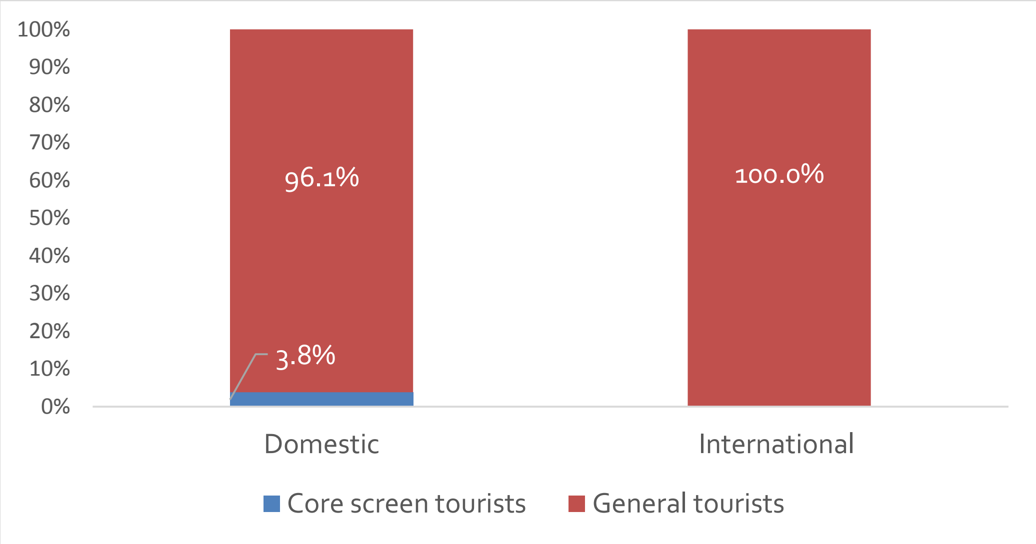
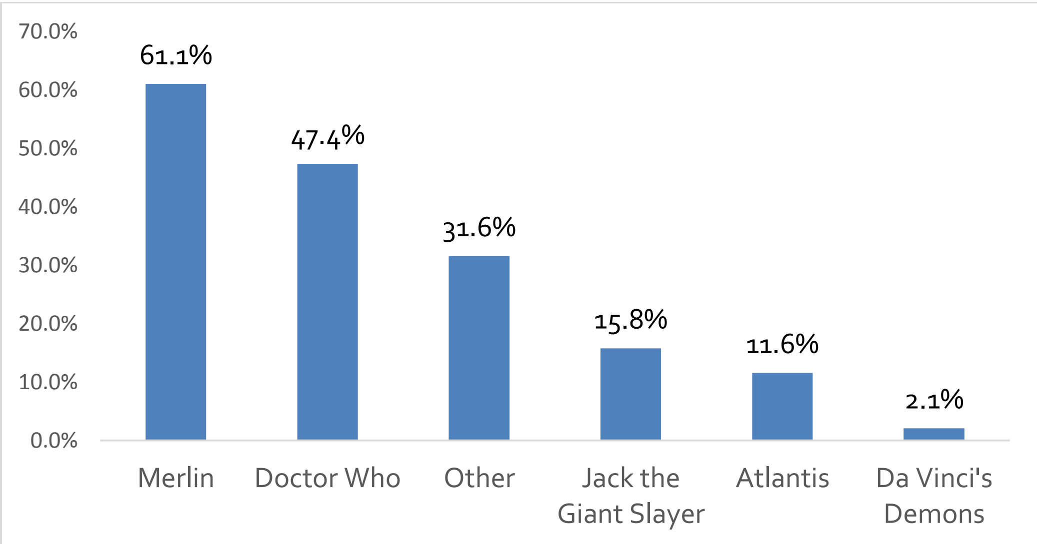


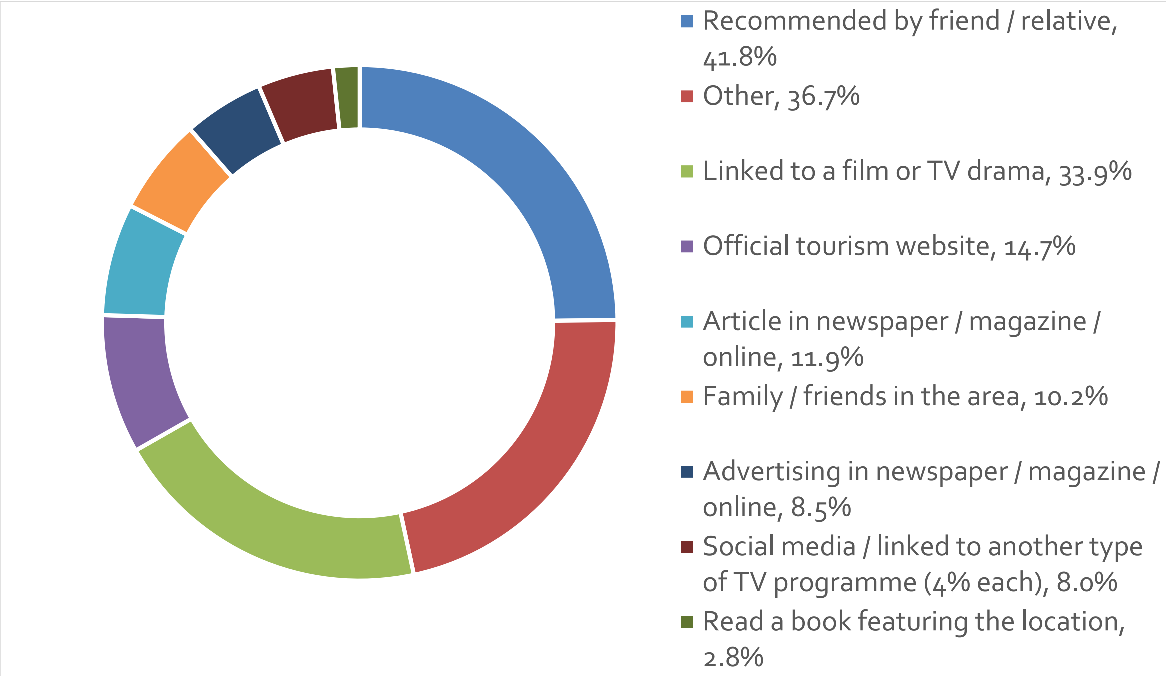
Figure 48 – "Which of these films or television dramas partly motivated your visit to Puzzlewood?"



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

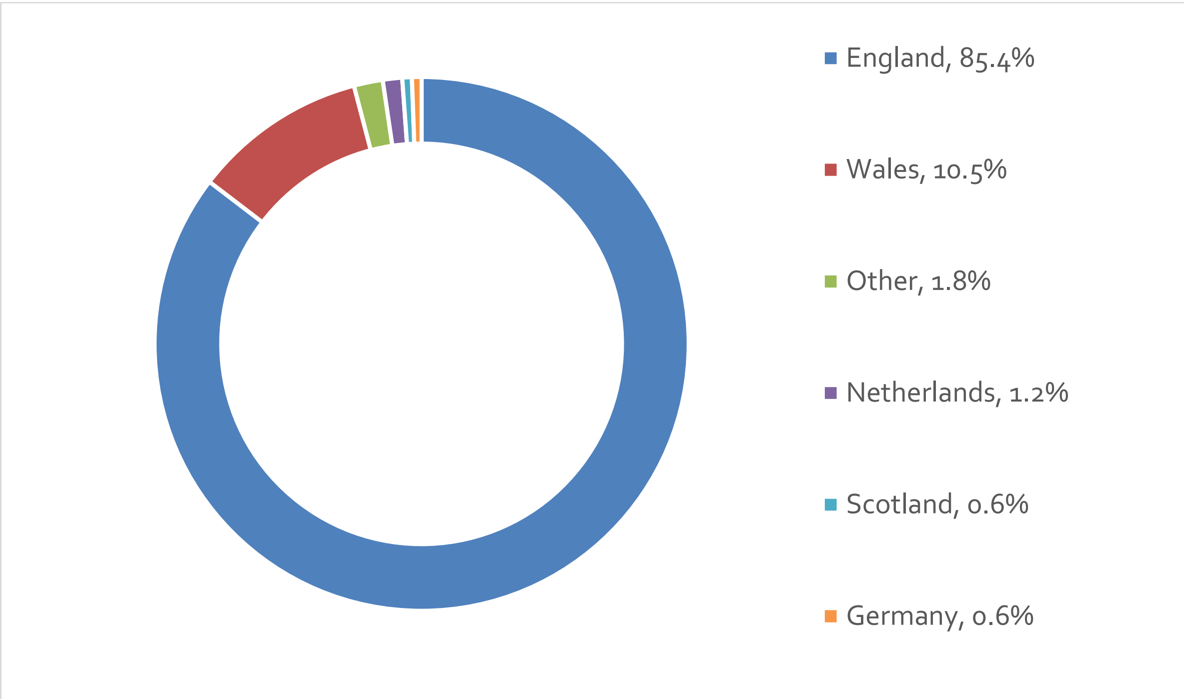
While the screen link was a key factor for tourists, word of mouth was the major decision-making factor, with 41.8% pointing to a recommendation from a friend or relative as being key. The 'other' category points to a large number of visitors saying that seeing a Puzzlewood leaflet had prompted their visit, while there were also a number of repeat visitors.

Figure 49 – 'Which of the following contributed to your decision to visit Puzzlewood?'



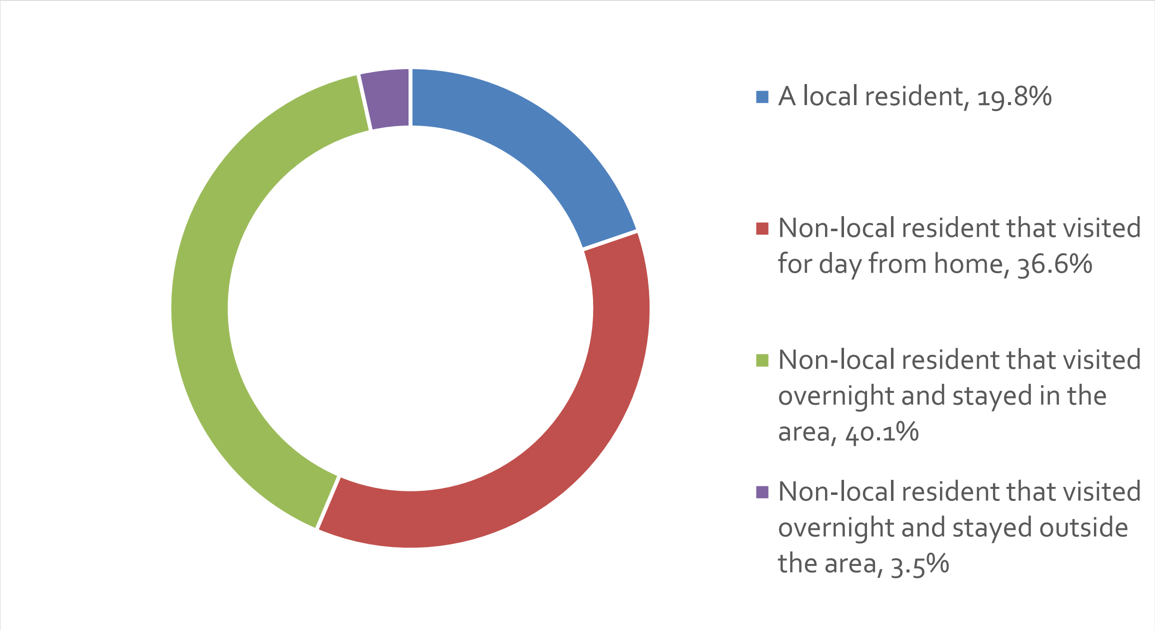
International respondents were from the Netherlands, Germany, Belgium, and Denmark.

Figure 50 – 'Where is your country of residence?'



In terms of leading visitor types, there was a fairly even split between non-locals visiting for the day from home and non-locals staying in the area.

Figure 51 – "Are you…?"



5.7. West Bay

5.7.1. Location overview

Situated in Dorset, in the South West of England, West Bay is a small harbour settlement within the small town of Bridport, Dorset – population 9,997. With its iconic cliffs, West Bay is located at the western end of Chesil Bank, with the area forming part of the Dorset Jurassic Coast World Heritage Site within Lyme Bay. West Bay is a centre for fishing, tourism and geology.

Producers are attracted to the area by the unspoilt countryside, dramatic coastline and proximity of manor houses and beautiful gardens. West Bay was used extensively as the fictional town of Broadchurch in two series of the titular ITV drama, providing the setting for the café, police station, newsagents, Sea Brigade Hall and harbour, as well as the caravan park and beach hut located nearby.

The town has also been used for BBC series *Harbour Lights* (1999-2000) and featured in the opening sequence of BBC sitcom *The Fall and Rise of Reginald Perrin*.

Visit Dorset undertook a substantial marketing campaign to exploit the tourism opportunity *Broadchurch* offered to the region. These included a Broadchurch-specific pay-per-click campaign which ran throughout the duration of the show, using key search terms and phases specific to the series and its filming locations.

A *Broadchurch* Trail poster and leaflets are also distributed in visitor centres and available as a download. Visitors picking up the leaflets could enter a prize draw to win a signed DVD of the series.

The DMO also ran several online campaigns and competitions via Facebook, Twitter and Pinterest; an email campaign was sent to Visit Dorset's database of 50,000 Dorset visitor enquirers. There was a substantial increase in fans and followers to the Visit Dorset Facebook and Twitter accounts, whilst its *Broadchurch* webpage became the most-visited page on its website in March 2013, with site traffic increasing by more than 200%.

Working with the media resulted in excellent national press coverage. This included features in The Radio Times (22nd April 2013), The Sun (19 March 2013), The Sunday Times travel section (28 April 2013) and The Guardian (22nd April 2013), as well as numerous features in the local press and websites.

West Dorset has placed ads in the *Broadchurch* novel to drive screen tourists to West Bay and Bridport.

The show has had a significant impact. An Exeter University survey of 60 tourism-related local businesses found that more than three-quarters of respondents stated that trade had increased in 2013, and nearly half of these thought this was definitely or probably due to *Broadchurch*.[61]

In addition to screen tourists, West Bay attracts walkers, nature lovers, families and visitors interested in the arts and culture and food.

[61] *The Impact of Broadchurch on Tourism Business in West Dorset.* Exeter University Business School, January 2014.

5.7.2. Profile of Broadchurch

Broadchurch is a British television crime drama created and written by *Doctor Who* and *Torchwood* writer Chris Chibnall. Produced by Kudos, it was commissioned and broadcast by ITV. The first series achieved high ratings for ITV and won critical acclaim. The second series, produced in 2014, began screening on ITV in 2015.

The lack of leaked clues or teasers released by the production between the weekly broadcast episodes generated a huge interest amongst the public and media with The Royal Television Society describing the series as a 'cultural phenomenon'.

The series was acquired and broadcast by BBC America in the US and in more than 30 other territories. The Fox Broadcasting Company bought the remake rights and have titled the US series *Gracepoint* which also stars David Tennant.

UK audience average per episode over the first series was 7.8 million.[62] In terms of viewer profile the largest group was the over-65s, with 35.1%, with 45-54 year-olds and 55-64 year-olds making up around 20% each. In terms of gender, 64.5% of viewers were female, with 35.5% male.

First broadcast in the UK from 4th March 2013 to 22nd April 2013, the first series of *Broadchurch* is also available on DVD and online. To date, the first series has sold to over 135 territories worldwide, including the US, Canada, Australia, Africa, Russia, Brazil, France, Germany, the Netherlands and China. In France, *Broadchurch* delivered an audience of 7.3 million viewers and a 27.5% market share (exceeding France2's slot average by 64%); in Spain *Broadchurch* launched with a debut audience of 3 million viewers and a 18.6% market share (+41% higher than Antena 3's primetime average); and in Sweden, *Broadchurch* gained an audience of over one million viewers on TV4, winning a market share 39% higher than the broadcaster's primetime average for all viewers

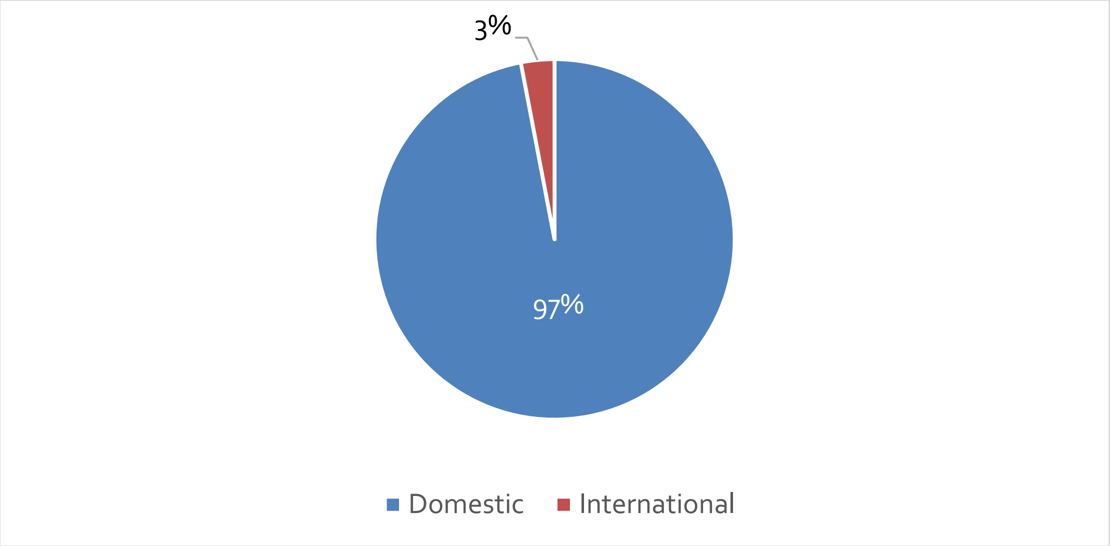
The first series of *Broadchurch* was nominated for 31 awards, winning 16 including three BAFTAs in 2014 for best TV drama, best leading actress and best supporting actor.

5.7.3. Survey findings

A site survey was undertaken at West Bay on Friday, 29th August, 2014, with a link to an online survey sent to consumer databases. There were 176 total respondents, representing 599 visitors when group sizes were factored in. This reflects the number of family groups encountered on site. Within the total sample, the clear majority of visitors were domestic, with 580 compared with just 19 international tourists.

[62] Source: Broadcast Audience Research Board (BARB).

Figure 52 – Proportion of Domestic and International Respondents at West Bay



Within the relatively small group of international visitors a number of core screen tourists were detected, representing 52.6%. Within the domestic group core screen tourists represented 7.7% of visitors. West Bay was found to have a number of visitors who return regularly. While several said that they were very interested in the *Broadchurch* connection, they would have visited anyway and were not counted as core screen tourists.

Broadchurch was the key production for core screen tourists, with 79.5% listing it as partly motivating their visit. A number of respondents pointed to 'other' productions – namely *Harbour Lights* with two pointing to *River Cottage* series of television food shows.

Figure 53 – Proportion of Core Screen Tourists at West Bay within Domestic and International Groups

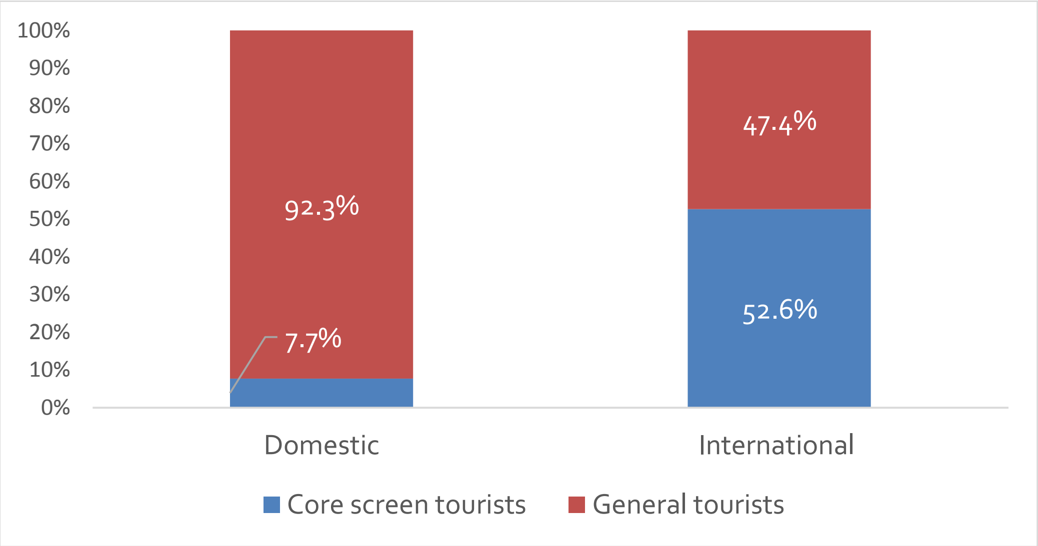
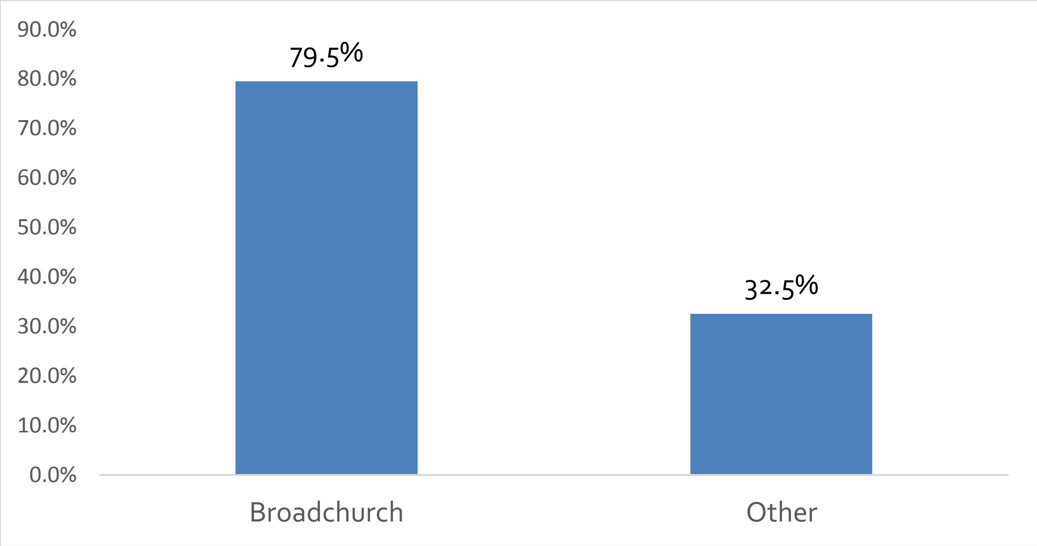


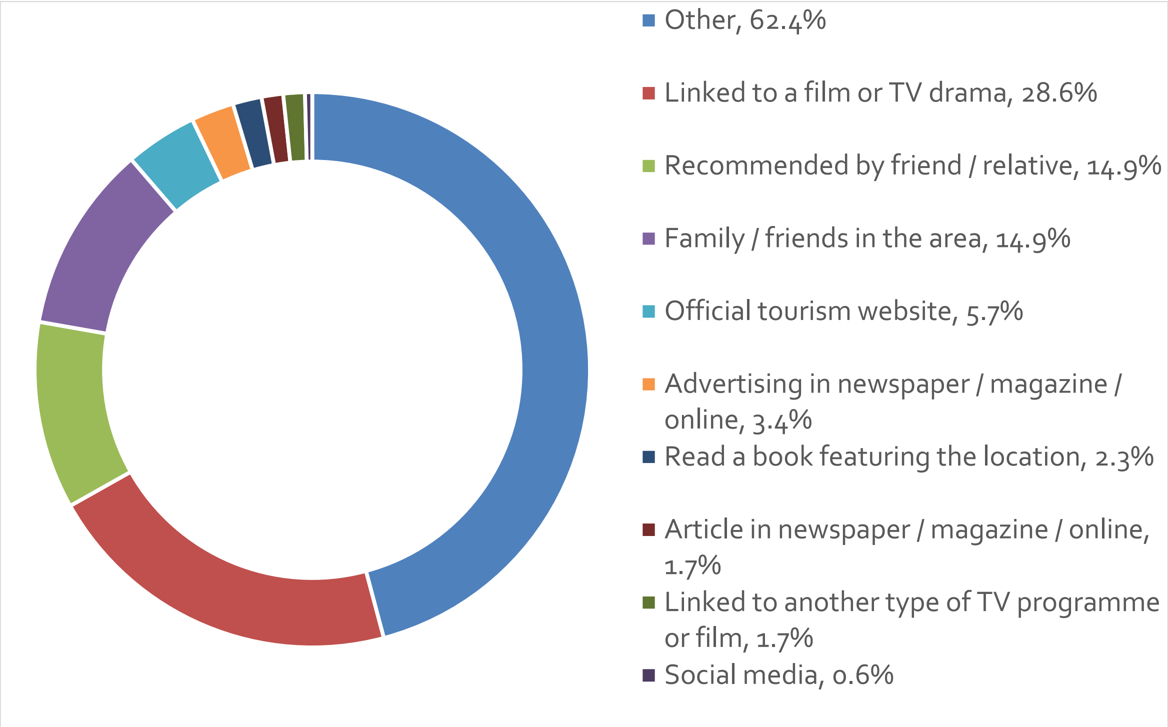
Figure 54 – "Which of these films or television dramas partly motivated your visit to West Bay?"



Note: Results represent proportion of all screen tourists for whom each production was a factor in their visit.

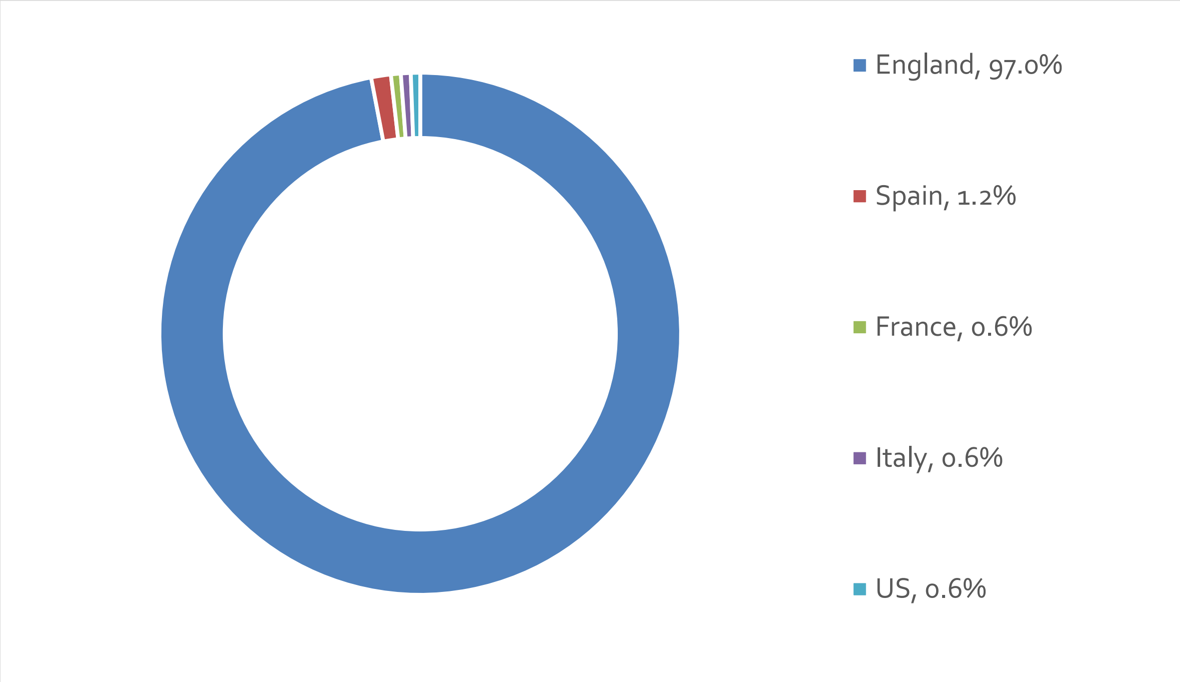
The screen link was a key factor in visitor decisions. Of the respondents pointing to other reasons, many were repeat visitors.

Figure 55 – 'Which of the following contributed to your decision to visit West Bay?'



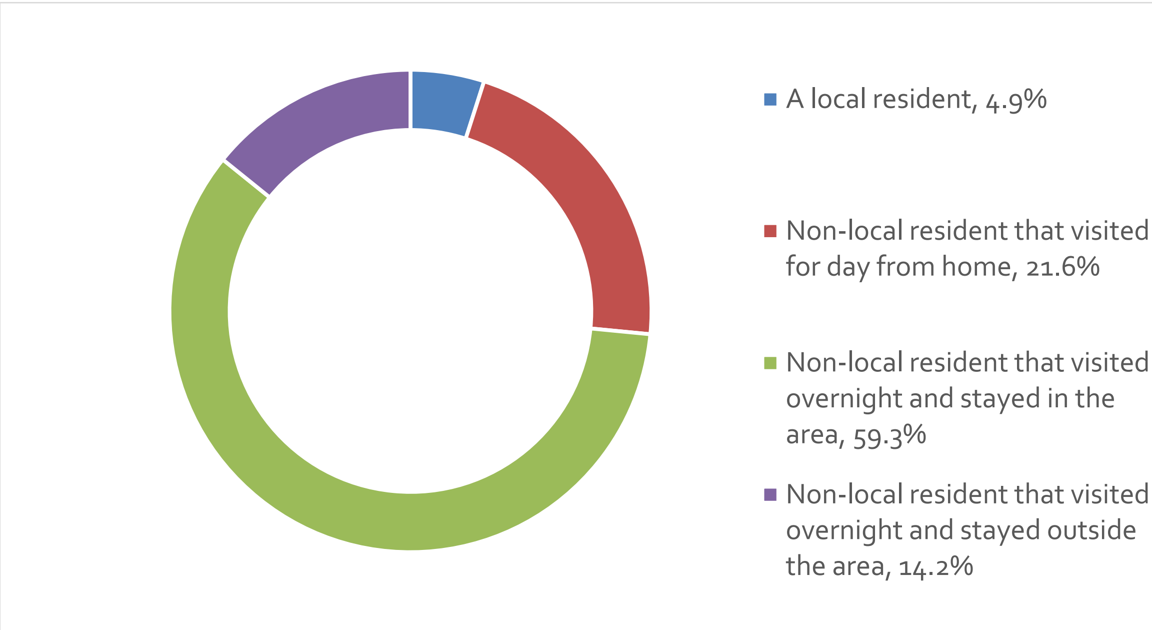
The clear majority of visitors were from England, with a small number from Spain, France, Italy and the US.

Figure 56 – 'Where is your country of residence?'



Reflecting Dorset's appeal as a holiday destination the largest respondent group was tourists visiting overnight and staying in the area.

Figure 57 – "Are you…?"



5.8. Wollaton Hall

5.8.1. Location overview

Wollaton Hall is an Elizabethan country house in Wollaton Park, three miles west of Nottingham City Centre. Set in 500-acres of gardens and parkland, it is the home of the Nottingham Natural History Museum with the Nottingham Industrial Museum located in the grounds.

Owned and managed by Nottingham City Council, Wollaton has free entry.

Producers are attracted to the location by the grandeur of the period architecture and beautiful park, with Wollaton Hall doubling as the exterior of Bruce Wayne's rebuilt family home Wayne Manor in *The Dark Knight Rises*. Interior use included the Salon Room as the East Wing of the Manor and the kitchen, while gardens were also featured in several scenes.

Wollaton Hall hosts sell out screenings of the film in the gardens every summer and tells the story of the filming of *The Dark Knight Rises* within Wollaton Hall visitor experience guided tours. The venue also holds superhero family picnic events in the summer. (However Nottingham County Council's Wollaton Hall promotional leaflet does not mention the film or other production associations with the venue.)

DMO Experience Nottinghamshire undertook a substantial amount of promotion exploiting the link with the film when it was released in the UK. This included a national billboard campaign, funded by Creative England. It also has a dedicated page for film tourists on the website and still promotes the film's association with Wollaton in its literature.

Anecdotally, the venue noticed a substantial increase in visitor numbers following the release of *The Dark Knight Rises*.

The deer park, museums, the Elizabethan house and the Hall doubling as Wayne Manor all attract visitors to the house.

5.8.2. Profile of The Dark Knight Rises

The Dark Knight Rises (2012) is the third and final film in the Batman trilogy directed by Christopher Nolan. The sequel to *Batman Begins* (2005) and *The Dark Knight* (2008), it stars Christian Bale as the hero.

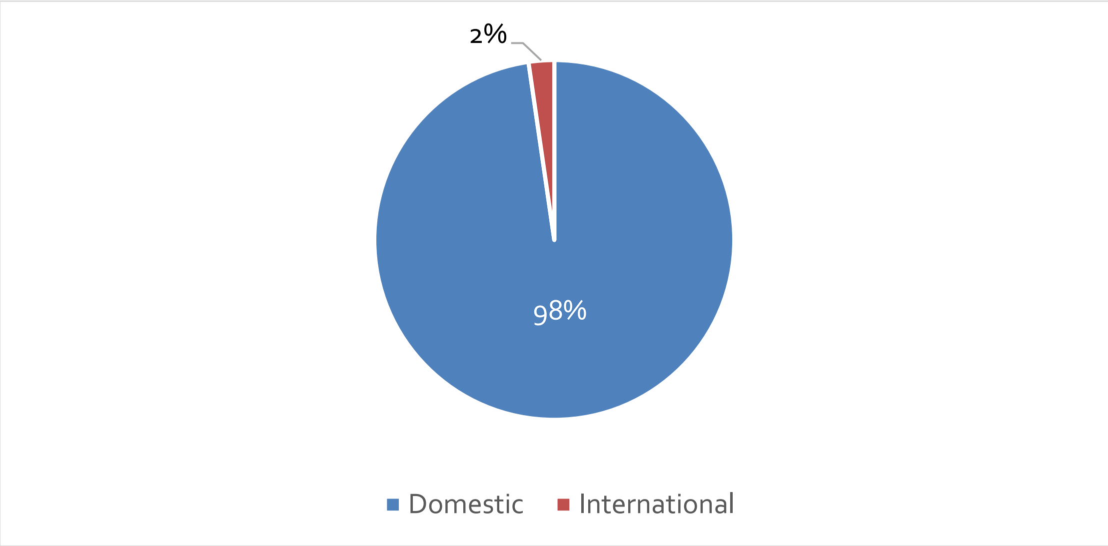
Critically acclaimed, the film was released in 76 territories between 16th July and 29th August, 2012. It was the third highest-grossing film of that year, taking $1bn worldwide. This included $448 million in North America and $636 million internationally.

Outside North America, the film opened with takings of $88 million from 7,173 theatres in 17 markets. It was in first place at the box office outside North America for four consecutive weekends. Its top 10 box office territories were the US ($448 million); the UK ($90 million); China ($53 million); Australia ($44 million); South Korea ($42 million); France ($36 million); Germany ($35 million); Mexico ($32 million); Brazil ($27 million); and Japan ($24 million).

5.8.3. Survey results

An online visitor survey saw 187 total respondents, representing 474 visitors when group sizes were factored in. Within the total sample, there was a low number of international respondents, with just 11 inbound visitors compared with 463 domestic.

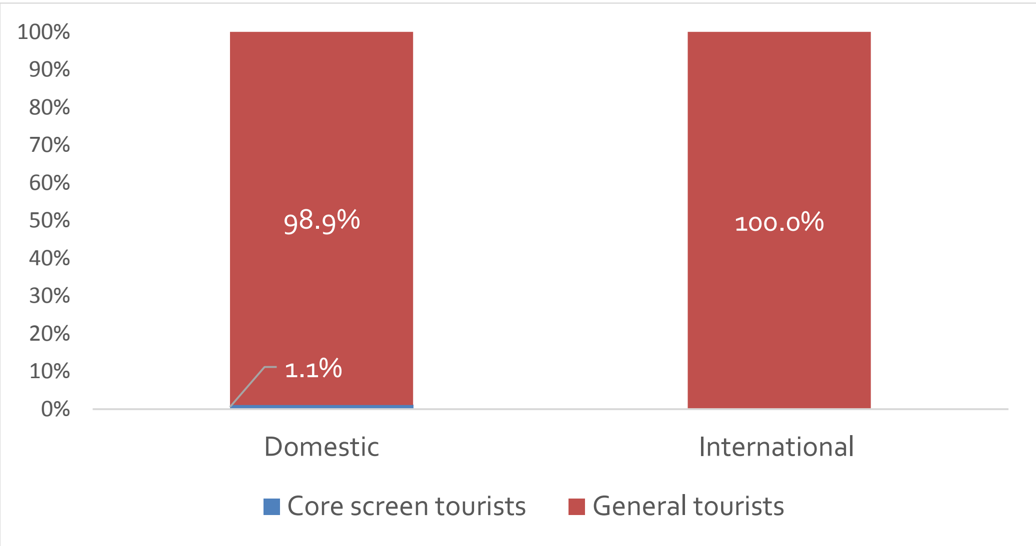
Figure 58 – Proportion of Domestic and International Respondents at Wollaton



Within this sample, no core international tourists were detected, though this is very likely related to the low international response rate. Assessment of the domestic group shows a relatively low proportion of core domestic screen tourists, at just 1.1%.

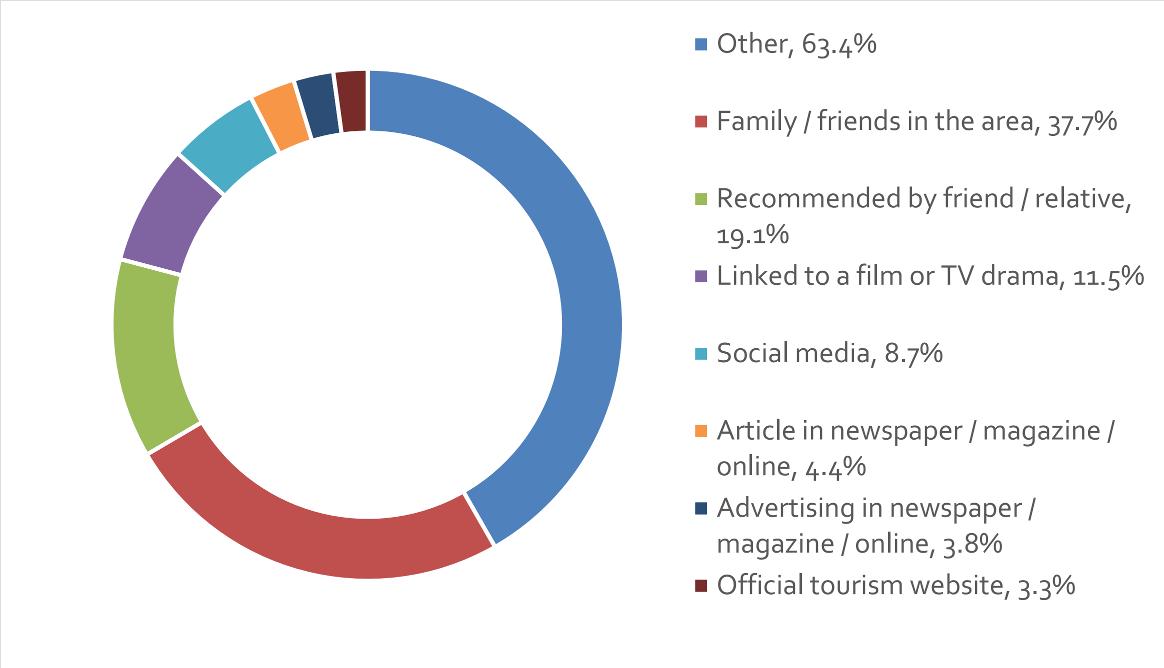
As with some other sites, this low proportion may point to the site's strong overall attraction to regular, local visitors.

Figure 59 – Proportion of Core Screen Tourists at Wollaton within Domestic and International Groups



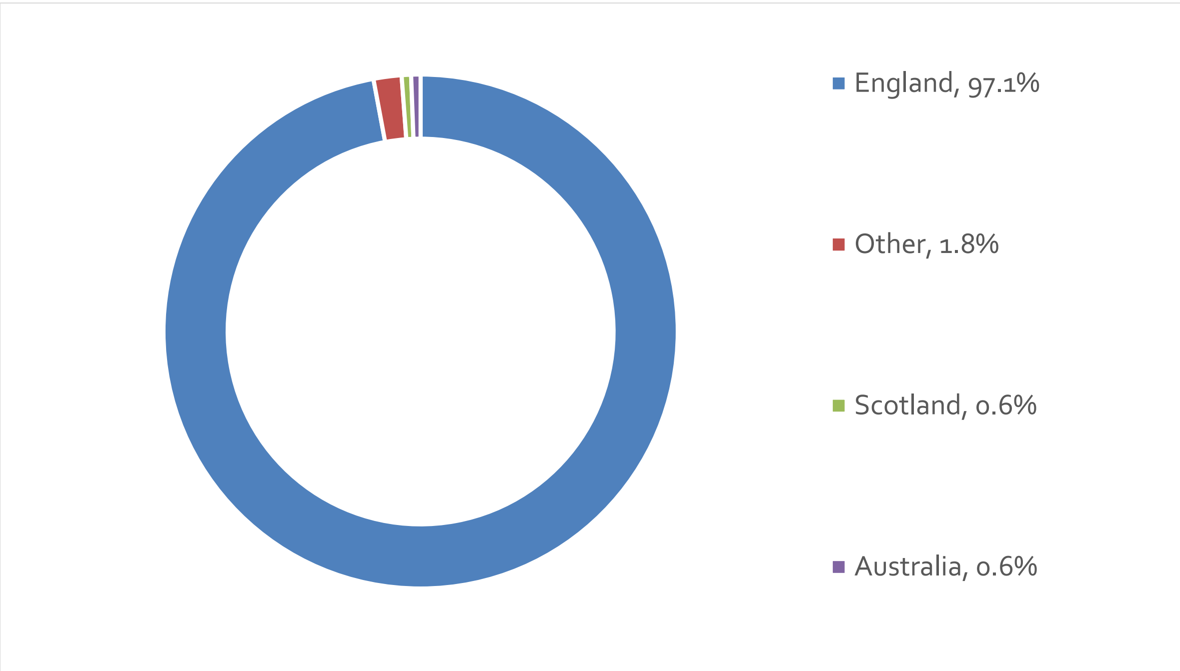
The screen link was actually the fourth most popular factor in visitors deciding to visit, but given that most had other reasons for visiting they were not detected as core screen tourists. Analysis of the 'other' category shows very high proportion of local repeat visitors, with one visitor saying they visited several times per week.

Figure 60 – 'Which of the following contributed to your decision to visit Wollaton?'



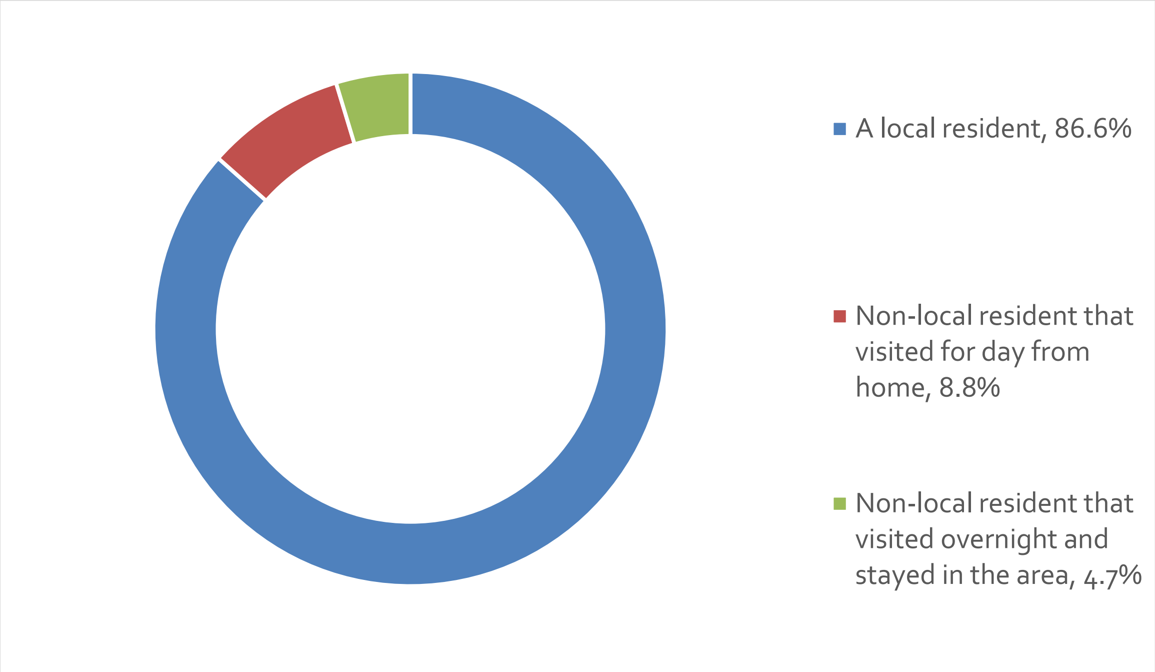
Unsurprisingly, English visitors represented the majority of respondents, with visitors from Australia, Hungary, Latvia and Chile.

Figure 61 – 'Where is your country of residence?'



Wollaton's local appeal is underlined by the fact the majority of visitors were local residents. No non-local residents visiting overnight and staying outside the area were identified.

Figure 62 – "Are you…?"



6. APPENDIX ONE – FULL SURVEY

The full online survey for Alnwick Castle, including introductory text, is appended below. Both online and site surveys were the same with a few small differences related to their method of delivery. For example, the site surveys did not include questions one or two, which were included in the online surveys to ensure that respondents had visited the site.

For some sites, a small number of additional questions were added for the location or the DMO, with data to be shared with them.

6.1. Full Survey

ABOUT THIS SURVEY

This visitor survey is part of a major Study being undertaken by Olsberg•SPI for Creative England. The survey is being conducted to find out about reasons for visiting Alnwick Castle. It is designed for previous visitors to Alnwick Castle and is not relevant for people who have never visited.

REASONS FOR YOUR VISIT

1. **Have you ever visited Alnwick Castle?**
   Yes (Please go to Question 2)
   No (Please do not continue. This survey is only relevant for previous visitors)

2. **When did you last visit Alnwick Castle?**
   More than five years ago
   More than a year ago
   Within the last year
   Within the last six months

3. **Which of the following contributed to your decision to visit Alnwick Castle? (Please answer as many as you wish).**
   It was recommended by a friend or relative
   Article in newspaper / magazine / online
   Advertising in newspaper / magazine / online
   Social media
   Read a book featuring the location
   It is linked to a film or television drama
   It is linked to another type of television programme or film
   (e.g. travel or food programme)
   Official tourism website
   Family / friends in the area
   Other (please specify)

4. **If one of the reasons for your visit was Alnwick Castle's links to a film or television drama how important was that link in your decision to visit?**
   It was the main reason
   It was a main reason, but there were also other factors
   It was a secondary reason
   It was only a minor reason

5. **Would you have visited Alnwick Castle if you had not been aware of its links to a film and / or television drama?**
   Yes
   No

6. **Which of these films or television dramas partly motivated your visit to Alnwick Castle?**
   Harry Potter and the Philosopher's Stone
   Harry Potter and the Chamber of Secrets
   Other (please specify)

7. **Have you seen the production/s mentioned above? (Yes / No)**
   Harry Potter and the Philosopher's Stone
   Harry Potter and the Chamber of Secrets
   Other (please specify)

8. **How did you find out that Alnwick Castle had been featured in the above production/s?**
   It was clear from viewing the production
   An article in a newspaper, magazine or online
   Word of mouth
   Social media
   My own research
   Advertising or marketing
   Official tourism website

9. **If you have visited other locations featured in film or television drama in the last 12 months where were they? (Please detail number of locations visited)**
   England
   Northern Ireland
   Scotland
   Wales
   Overseas

10. **Do you feel you are more likely to visit locations because of their links with film or television drama now than you were three years ago?**
    Yes
    No
    Don't know

11. **Do you plan to visit more locations with links to film and television drama in the next 12 months?**
    Yes
    No

ABOUT YOUR VISIT

12. **Are you…?**
    A local resident
    Non local resident that visited for day from home
    Non local resident that visited overnight and stayed in the area
    Non local resident that visited overnight and stayed outside the area

13. If part of a trip of one or more nights, how many nights exactly did your visit consist of?

1
2
3
4
5
6
7
8
9
10
11
12
13
14
More than 14

14. If your visit was part of a trip of more than one night, how important was Alnwick Castle's links to a film or television drama in your decision to make the overall trip?

It was the main reason
It was a main reason, but there were also other factors
It was a secondary reason
It was only a minor reason

15. If your visit was part of a trip of more than one night, would you have undertaken your entire trip if you had not been aware of Alnwick Castle's links to film and / or television drama?

Yes
No

16. How many people were in your party, including yourself?

1
2
3
4
5
More than 5

17. Approximately how much do you think you and your party spent during the day of your visit (including items such as shopping, food and drink, travel and transport and entertainment but not accommodation)?

£_________

18. How likely are you to recommend Alnwick Castle to friends/relatives?

Definitely
Probably
Fairly likely
Probably not
Definitely not
I have not completed my visit so cannot say

ABOUT YOU

19. **What is your gender?**
    Female
    Male
20. **What is your age group?**
    15-24
    25-34
    35-44
    45-54
    55-64
    65+

21. **Where is your country of residence?**
    England
    Scotland
    Wales
    Northern Ireland
    Republic of Ireland
    Germany
    France
    Italy
    Spain
    Netherlands
    USA
    Canada
    Australia
    New Zealand
    Other (please specify)

22. **If residing in England which region are you from?**
    East Midlands
    East of England
    North West
    North East
    South East
    South West
    West Midlands
    Yorkshire & The Humber
    London

23. **Do you have any other comments?**

7. APPENDIX TWO – BIBLIOGRAPHY

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8. APPENDIX THREE – CONSULTEES

Tourism Authorities

- Stuart Heath, Head of Marketing Partnerships (VisitEngland)
- Sharon Orrell, Head of Research & Insight (VisitEngland)
- Tim Holt, Head of Marketing (VisitEngland)

Destination Marketing Organisations

- Phillip Eke, Tourism Support Officer, Borough Council of King's Lynn & West Norfolk
- Scott Condliffe, Chairman, Bridport & District Tourism Association
- Greg Stephenson, Communications Manager, Cumbria Tourism
- Cheryl Stapleton, Tourism Development Manager, Dorset Leisure & Tourism
- Erin Huckle, PR Manager, Experience Nottinghamshire
- Natalie Walsh, Deputy Marketing Manager, Experience Nottinghamshire
- Giles Ingram, CEO, Experience Oxfordshire
- Jo Butler, Head of Marketing & Development, Experience Oxfordshire
- Digna Martinez, Destination Services Manager, Experience Oxfordshire
- Andrew Bateman, Tourism Manager, Hampshire County Council Tourism
- Anna Boyd-Smith, Tourism Officer, Hampshire County Council Tourism
- Nicola Said, Head of Campaigns, Marketing Cheshire
- Liz Barnwell, Deputy Chief Executive, Marketing Gloucester
- Gayle Woodruff, Production Services Manager, Northern Media
- Jude Leitch, General Manager, Northumberland Tourism
- Faith Blakemore, Events & Special Programmes Development Officer, Nottingham City Council Markets and Events
- Hayley Beer, Tourism Services Manager, Oxfordshire Cotswolds/West Oxfordshire District Council
- Dee Marshall, Head of Communications, Welcome to Yorkshire
- Helen Smith, International Marketing & Communications Executive, Welcome to Yorkshire
- Pete Wilson, Head of Digital, Welcome to Yorkshire
- Jessica Thornton, Tourism Marketing Manager, West Dorset (West Dorset District Council)
- Lucy Downing, Brand Manager, North Norfolk
- Tim Humphreys, West Norfolk Tourism Manager, Visit West Norfolk
- Pete Walters, Brand Manager, Visit Norfolk
- Paula Burrows, Commercial Manager, Wye Valley & Forest of Dean Tourist Association
- Jim Oribine, Head of Marketing, Visit Peaks and Derbyshire

Locations

- Samantha Charlton, CRM Manager and Business Analyst, Alnwick Castle
- Kate Woolmore , Marketing Manager, Alnwick Castle
- Nicky Gottelier, Bampton Archive
- Jo Lewington, Bampton Archive
- Rev David Lloyd, Vicar, St Marys Church, Bampton
- Elisabeth & Tony Page, Bampton Archive
- Hannah Cooke, Press & Communications Manager, Castle Howard Estate Ltd

- Rachel Underwood, Marketing Manager, Castle Howard Estate Ltd
- Helen O'Kane, Manager, Puzzlewood
- Penny Beniston, Site Manager, Wollaton Hall
- Cara Simmonds, Commercial Manager, Nottingham City Council
- Anthony Willder, Commercial Manager, National Trust
- Laurane Herrieven, Marketing Manager, Holkham Estate
- Paul O'Grady, Film Location Manager, Holkham Estate
- John Gundill, General Manager, Highclere Castle
- Julia Morgan, Assistant to General Manager, Highclere Castle

Other

- Val Blackburn, Director, Brit Movie Tours
- Geoff Ling, Finance Director, ITV Studios Global Entertainment
- Julian Murphy, Company Director, Urban Myth Films
- Alex Wells, Senior Publicity Manager, Shine Group

9. APPENDIX FOUR – LOCATIONS USED FOR SCALING-UP METHOD

The 92 locations that had values directly applied from the eight survey sites in the first step of the Scaling-Up Method are outlined below. The associated screen products represent a selection, with many sites having hosted multiple productions.

Table 9 – Locations Used for the First Step of the Scaling-Up Method

Location	Associated screen products	Region	Type of screen product	Assumed comparable site survey location
1. Alice Holt Forest	*Gladiator, The Golden Compass*	South East	Film	Puzzlewood
2. Alnwick Castle	*Harry Potter*	North East	Film	Alnwick Castle
3. Antony House	*Alice in Wonderland*	South West	Film	Alnwick Castle
4. Arten Gill Viaduct	*Miss Potter*	North West	Film	Holkham
5. Arundel Castle	*Doctor Who, The Madness of King George, The Young Victoria*	South East	Film / TV	Alnwick Castle
6. Ashridge Estate	*Maleficent, Robin Hood, Harry Potter*	South East	Film	West Bay
7. Askrigg	*All Creatures Great and Small*	Yorks	TV	Bampton
8. Bampton	*Downton Abbey*	South East	TV	Bampton
9. Basildon Park	*Downton Abbey, The Duchess, Pride and Prejudice*	South East	Film / TV	Lyme Park
10. Belvoir Castle	*The Da Vinci Code, Young Victoria*	Midlands	Film / TV	Alnwick Castle
11. Black Park	*Goldfinger, Casino Royale, Batman, Sleepy Hollow, Bugsy Malone, Harry Potter*	South East	Film	Alnwick Castle
12. Blenheim Palace	*Barry Lyndon, The Young Victoria, Hamlet, The Avengers, The Four*	South East	Film / TV	Lyme Park

	Feathers, Kabhi Khushi Kabhi Gham			
13. Bluebell Railway	*Woman in Black, Downton Abbey, The Invisible Woman, John Carter, The Wind in the Willows, The Railway Children*	South East	Film / TV	Bampton
14. Bodleian Library, Oxford	*Harry Potter, X-Men 4, The Golden Compass, Lewis, The History Boys, The New World, Inspector Morse*	South East	Film / TV	Bampton
15. Bourne Wood	*Gladiator, Robin Hood, Harry Potter, Snow White and the Huntsman*	South East	Film	West Bay
16. Brighton Pier	*Mona Lisa, End of the Affair, Brighton Rock, Cassandra's Dream*	South East	Film	West Bay
17. Broad Leys	*French Lieutenant's Woman*	North West	Film	Castle Howard
18. Broughton Castle	*Shakespeare in Love, The Madness of King George*	South East	Film, TV	Holkham
19. Burghley House	*Middlemarch, The Da Vinci Code, Pride & Prejudice* (2005 film), *Elizabeth: The Golden Age, Housefull 2*	Midlands	Film / TV	Lyme Park
20. Burnham Beeches	Many, including *Robin Hood: Prince of Thieves, Goldfinger, Harry Potter*	South East	Film /TV	West Bay
21. Carnforth Station	*Brief Encounter*	North West	Film	Lyme Park
22. Castle Combe	*War Horse, The Wolf Man, Poirot, Stardust, Doctor Dolittle*	South West	Film / TV	Bampton

23. Castle Howard	*Brideshead Revisited*	North East	Film / TV	Castle Howard
24. Charlestown, Cornwall	*Alice in Wonderland, Doctor Who*	South West	Film/ TV	West Bay
25. Chatham Historic Dockyard	*Les Miserables, Call The Midwife, Sherlock Holmes*	South East	Film / TV	Lyme Park
26. Chatsworth House	*Pride & Prejudice* (2005 film)	Midlands	Film	Lyme Park
27. Chavenage House	Rosamunde Pilcher adaptations, *Lark Rise to Candleford, Tess of the d'Urbervilles, Barry Lyndon* and others	South West	Film / TV	Lyme Park
28. Christ Church College, Oxford	*Harry Potter*	South East	Film	Alnwick Castle
29. Clandon Park	*The Duchess*	South East	Film	Holkham
30. Clearwell Caves	*Doctor Who*	South West	TV	Puzzlewood
31. Cliveden	*Sherlock Holmes*	South East	Film	Castle Howard
32. Coalhouse Fort	*Batman Begins*	South East	Film	Wollaton Hall
33. Corsham Court	*Barry Lyndon, The Remains of the Day*	South West	Film	Lyme Park
34. Cromer Pier	*Alan Partridge: Alpha Papa*	East	Film	West Bay
35. Ditchley	*The Young Victoria, Black Beauty, Vanity Fair*	South East	Film / TV	Lyme Park
36. Dovedale National Nature Reserve	*Robin Hood, Jane Eyre, The Other Boleyn Girl*	North West	Film	Puzzlewood
37. Durham Cathedral	*Harry Potter, Elizabeth*	North East	Film	Alnwick Castle
38. Durdle Door	*Wilde, Nanny McPhee*	South West	Film	Holkham
39. Dyrham Park	*The Remains of the Day, Doctor Who*	South West	Film / TV	Lyme Park

40. Elm Hill, Norwich	*Stardust*	East	Film	Lyme Park
41. Ely Cathedral	*The King's Speech*	East	Film	Lyme Park
42. Englefield House	*The King's Speech, Great Expectations* and others	South East	Film / TV	Lyme Park
43. Eton College	*Chariots of Fire, Shakespeare in Love*	South East	Film / TV	Lyme Park
44. Felbrigg Hall	*A Cock And Bull Story*	East	Film	Wollaton Hall
45. Fountains Abbey and Studley Royal Water Garden	*The History Boys*	North Yorks	Film	Castle Howard
46. Goathland	*Heartbeat*	Yorks	TV	Bampton
47. Gloucester Cathedral	*Harry Potter, Doctor Who, The Hollow Crown*	South West	Film/ TV	Alnwick Castle
48. Great Chalfield Manor and Garden	*Lark Rise to Candleford*	South West	TV	Lyme Park
49. Groombridge Place	*Pride and Prejudice, The Draughtsman's Contract, The Day of the Triffids*	South East	Film/TV	Lyme Park
50. Haddon Hall	*The Princess Bride, Jane Eyre, Pride and Prejudice*	Midlands	Film / TV	Lyme Park
51. Hastings	*Foyle's War*	South	TV	Bampton
52. Hatfield House	*Get Him to the Greek, Sherlock Holmes, Shakespeare in Love, The Golden Age, The New World, Batman* (1989)	South East	Film / TV	Alnwick Castle
53. Henley-on-Thames	*Midsomer Murders*	South East	TV	West Bay
54. Highclere Castle	*Downton Abbey*	South East	TV	Bampton

55. Highley Station, Shropshire	*The Chronicles of Narnia*	West Midlands	Film	Puzzlewood
56. Holkham	*Shakespeare in Love, The Duchess*	East	Film	Holkham
57. Holywell Bay	*Die Another Day*	South West	Film	Wollaton Hall
58. Kedleston Hall	*The Duchess*	Midlands	Film	Holkham
59. Keighley and Worth Valley Railway	*The Railway Children*	Yorks	Film	West Bay
60. Kettlewell Village	*Calendar Girls*	North Yorks	Film	West Bay
61. Knebworth House	*The King's Speech, Jonathan Creek, Harry Potter*	South East	Film / TV	Alnwick Castle
62. Knole Estate	*The Other Boleyn Girl, Sherlock Holmes: A Game of Shadows*	South East	Film	Puzzlewood
63. Lacock Village	*Cranford, Harry Potter*	South West	Film / TV	Bampton
64. Leeds Castle	*Kind Hearts and Coronets, The Moonraker, Doctor Who*	South East	Film / TV	Castle Howard
65. Lincoln Cathedral	*The Da Vinci Code, Young Victoria*	East Midlands	Film	Lyme Park
66. Luckington Court	*Pride and Prejudice*	South West	Film	Lyme Park
67. Luton Hoo	*War Horse, Little Dorrit, Four Weddings and a Funeral, Bleak House*	South East	Film / TV	Lyme Park
68. Lyme Park	*Pride and Prejudice*	North West	Film / TV	Lyme Park
69. Lyme Regis	*The French Lieutenant's Woman*	South West	Film	Lyme Park

70. Mompesson House	*Sense and Sensibility*	South West	Film	Lyme Park
71. Nene Valley Railway	Over 150 films, commercials and TV shows including *Octopussy, Dalziel and Pascoe, Silent Witness, Hugo*	Midlands	Film / TV	Puzzlewood
72. Norwich Cathedral	*Jack The Giant Slayer, Dean Spanley, The Mill on the Floss*	East	Film / TV	Castle Howard
73. Old Wardour Castle	*Robin Hood: Prince of Thieves*	South West	Film	Lyme Park
74. Owlpen Manor	*The Other Boleyn Girl, Tess of the d'Urbervilles*	South West	Film / TV	Holkham
75. Port Isaac	*Doc Martin*	South West	TV	Lyme Park
76. Prideaux Place	Rosamunde Pilcher adaptations	South West	TV	Lyme Park
77. Puzzlewood	*Doctor Who, Merlin, Atlantis*	South West	Film / TV	Puzzlewood
78. Quarry Bank Mill	*The Mill*	North West	TV	Puzzlewood
79. Queen Street Mill, Lancashire	*The King's Speech, North & South, Life on Mars*	North West	Film /TV	Castle Howard
80. Romsey	*Inspector Wexford*	South East	TV	West Bay
81. The Royal Crescent, Bath	*Vanity Fair, Inspector Morse, Persuasion, The Duchess*	South West	Film / TV	Bampton
82. Snownshill Village, Cotswolds	*Bridget Jones's Diary*	South West	Film	Puzzlewood
83. Stamford	*Pride & Prejudice, Middlemarch*	Midlands	Film/ TV	Lyme Park

84. Stanley Dock, Liverpool	*Captain America: The First Avenger, Sherlock Holmes*	North West	Film	Wollaton Hall
85. Stanway House	Episode of *Jeeves & Wooster, Vanity Fair, The Libertine*	South West	Film / TV	Lyme Park
86. Stoke Park	*Goldfinger, Layer Cake, Wimbledon, Bride & Prejudice, Bridget Jones's Diary*	South East	Film	Lyme Park
87. Stokesay Court	*Atonement*	West	Film	Lyme Park
88. Stonehenge	*Doctor Who, Tess of the d'Urbervilles*	South West	TV	West Bay
89. Stourhead House and Gardens	*Barry Lyndon, Pride & Prejudice*	South West	Film	Lyme Park
90. Stowe	*Indiana Jones and the Last Crusade, Kabhi Khushi Kabhi Gham, Proof of Life, Stardust, The World Is Not Enough*	South East	Film, TV	West Bay
91. Tarn Hows	*Miss Potter*	North West	Film	Puzzlewood
92. Thetford	*Dad's Army*	East	TV	West Bay
93. Waddesdon Manor	*Kabhi Khushi Kabhi Gham, The Queen, Downton Abbey, The Tenth Kingdom, The Mummy: Tomb of the Dragon Emperor, Sherlock Holmes: A Game of Shadows*	South East	Film /TV	Bampton
94. Wells, Somerset	*Hot Fuzz*	South West	Film	West Bay
95. West Bay	*Broadchurch, Harbour Lights*	South West	TV	West Bay
96. West Wycombe Park	*Downton Abbey, Cranford, Austenland, W.E., The Duchess, The*	South East	Film/ TV	Bampton

	Importance of Being Earnest			
97. Wilton House	*The Young Victoria, Mrs Brown, The Madness of King George, Blackadder, Barry Lyndon*	South West	Film / TV	Lyme Park
98. Wimpole Estate	*Easy Virtue*	East	Film	Castle Howard
99. Winchester Cathedral	*The Da Vinci Code*	South East	Film	Alnwick Castle
100. Wrotham Park	*Poirot, Sense and Sensibility, The Hour, Great Expectations, Jane Eyre, Bridget Jones's Diary*	South East	Film / TV	Lyme Park

10. APPENDIX FIVE – ABOUT CREATIVE ENGLAND'S PRODUCTION SERVICES DEPARTMENT

- Delivers bespoke, on-the-ground location, crewing and filming permission services to the film & TV industry to facilitate filming in the regions of England, outside of London
- Works with every feature film and drama enquiring and shooting in the English regions.
- Is an advocate and an authority on filming in the English regions, promoting the regional offer to the production industry, domestically and internationally
- Champions and supports the growth of all aspects of regional production infrastructure and production related businesses – connecting them to the market
- Tracks the value and impact of all types of production shooting on location, to evidence the economic, job and profile benefits to the UK economy
- Works with 290 local authorities and ancillary organisations, including tourism organisations, to advocate film-friendly best practice, increase exposure for regional locations and attractions and explore screen tourism and profile-raising opportunities from relevant productions.

Results over the last two years:

- Creative England has handled 2,066 filming enquiries leading to 1,881 productions shooting in the regions.
- This includes 158 features and 164 TV dramas, spending over £169 million on location in the regions.