

**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**

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PREPARED BY

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THE IMPACT OF *BROADCHURCH* ON BUSINESS IN WEST DORSET 2013

EXECUTIVE SUMMARY

- Achieving viewing figures of between 7-10 million per episode during an eight-week period in early 2013, *Broadchurch* was a highly successful TV drama series filmed in part in and around the West Bay area. The series stimulated huge interest in the filming location from the viewing public and the national media, alongside a number of initiatives set up by West Dorset and Weymouth & Portland Shared Services Partnership to harness the marketing opportunities presented by the portrayal of the locality on national television.
- Anecdotal evidence identified a rise in the number of people visiting Bridport and West Bay seeking the 'real' *Broadchurch*. The profile of the area as a visitor destination increased significantly and with immediate effect.
- This study reports on the extent to which *Broadchurch* impacted on tourism-related businesses in West Bay, Bridport and the surrounding area.
 - The primary objective is to identify the effect on business performance during April-October 2013, and the influence of *Broadchurch* on any identified increase in customer numbers, turnover and profitability.
 - A second objective is to evaluate the perceptions, opinions and experiences of business owners/managers in relation to *Broadchurch* and any effect that the series may have created in relation to visitor demand.
 - A third objective is to assess business owner/manager awareness of marketing initiatives to promote *Broadchurch*-related visits, and to identify the extent to which businesses have incorporated the theme within their own marketing activities.
- A questionnaire survey was sent to tourism-related businesses in West Bay, Bridport and surrounding area to ascertain the effects of *Broadchurch*-related tourism. Some 60 responses were received, yielding an approximate 30% response rate.
- Key findings of the study include:
 - Some **77% of businesses reported an increase in customer numbers** in 2013 and of these **47% thought that this was** either definitely or probably **due to**

Broadchurch. The increase in customer numbers was most apparent in Bridport and West Bay;

- Over **70% of businesses reported an increase in turnover** and of these **31% thought this was** either definitely or probably **due to Broadchurch**. The majority of these businesses were located in West Bay;
 - Profitability increased for over 50% of businesses responding to the survey;
 - **Food service enterprises comprise the most affected sector, especially those located in West Bay** who catered to the needs of people watching the filming, cast, crew and others associated with the filming, as well as a generally increased level of business through the year;
 - Results suggest that there was an **increase in enquiries and bookings for short breaks** in 2013 as reported by over one-third of accommodation providers across the area (not just West Bay). Some 25% of accommodation businesses reported an increase in enquiries for bookings in 2014;
 - Some **90% agreed or strongly agreed with the statement “I welcomed Broadchurch – it is the boost this area needs”**. Some 46% strongly agreed, indicating there is a reasonably strong level of support among the businesses surveyed;
 - Business owners/managers perceive that **Broadchurch has increased awareness of West Dorset**, and, to a slightly lesser extent, its appeal as a visitor destination. Conversely, a much smaller proportion believes that the profitability of tourism in the area has increased;
 - In relation to marketing, **38% were aware of the visit-dorset.com Broadchurch web page**. However, awareness of other marketing-related initiatives was lower.
 - Some **39% of business had used Broadchurch in their own marketing**, and a further 8% stated that they had not yet but planned to. The most common use was to feature or mention *Broadchurch* on their own web site, while a smaller number has used in social media blogs, twitter and on Tripadvisor.
 - A small number of businesses had adopted service or product innovations to appeal to the film tourism market;
- Largely, the findings of the survey indicate that **West Bay witnessed the most significant rise in visitor demand** and effect on business operations.
 - However, while *Broadchurch* was viewed as an **important contributor** to overall business performance, good summer weather was perceived as a crucial factor in determining the success of the summer season in 2013.

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THE IMPACT OF *BROADCHURCH* ON TOURISM BUSINESSES IN WEST DORSET - 2013

1.0 INTRODUCTION TO THE REPORT

This report focuses on the effect of film-induced tourism activity on tourism-related businesses in West Dorset during 2013 as a result of the television series *Broadchurch*. It outlines the findings of a research study to ascertain the perceived impacts of *Broadchurch* on business and operations, and the views of business owners/managers. In addition, it focuses on the role that *Broadchurch*, posited as “the hit of 2013”¹, played in place promotion and the subsequent impact on business performance. The report commences with a brief overview of film-induced tourism before outlining some critical facets of *Broadchurch*, including its creation, production values, viewing numbers and impact, alongside the tourism marketing initiatives developed at the local level. A brief summary of the study methodology follows, prior to the presentation of results and the implications of the research findings.

1.1 FILM-INDUCED TOURISM

Broadly speaking, film-induced tourism is tourist activity prompted directly or indirectly by the viewing of locations on film or television. This form of tourism is a globally occurring phenomenon and has been observed in a wide range of destinations creating a complexity of impacts, some positive and others not so. The business and wider economic development opportunities afforded by capitalising on film/TV as a tourism marketing tool are widely recognised and have been harnessed by numerous destination marketing organisations, notably in the UK, USA, Australia and New Zealand. Indeed, film tourism has formed one of the components of the VisitBritain portfolio since the 1990s. Taking advantage of the benefits of film tourism can assist in, for example:

- developing and/or supplementing the destination product portfolio;
- increasing tourist awareness and destination appeal;
- enhancing the visitor experience;
- creating new opportunities for business innovation;
- contributing to the viability of tourism².

In 2011³, the value of film-induced tourism was estimated at around £2.1 billion for the UK, accounting for about one-tenth of overseas tourism revenue. However, domestic market

¹ M. Bell (2014) Anatomy of a Hit. *Journal of the Royal Television Society* (January 2014): p22.

² See J. Connell (2012) Film Tourism: Evolution, Progress and Prospects, *Progress in Tourism Management* paper, *Tourism Management*, 33 (5): 1007-1029.

demand is equally, if not more, crucial in terms of day trips to specific locations, and short breaks as well as longer holidays that are inspired by places and landscapes viewed on screen. These effects are well documented at a national level.

1.2 RATIONALE FOR THE STUDY

A great deal of anecdotal evidence indicates an increase in interest in visiting West Dorset as a result of *Broadchurch*. However, what is less known, other than through newspaper reports⁴, is the extent to which the *Broadchurch* phenomenon has impacted on tourism-related businesses in the area. Gaining insights into the business impact might provide some indication of the power of this form of tourism in relation to economic development – both as felt in 2013 and in its potential use as a future developmental theme for Dorset.

Accordingly, the rationale for this study is to ascertain how *Broadchurch* impacted on businesses, primarily those deemed to be part of the tourism economy, in the West Dorset district, specifically Bridport and surrounding area, during 2013.

- The principal objective is to identify the effect on business performance during April-October 2013, and the influence of *Broadchurch* on any identified increase in customer numbers, turnover and profitability.
- A second objective is to evaluate the perceptions, opinions and experiences of business owners/managers in relation to *Broadchurch* and any effect that the series may have created in relation to visitor demand.
- A third objective is to assess business owner/manager awareness of marketing initiatives to promote *Broadchurch*-related visits, and to identify the extent to which businesses have incorporated the theme within their own marketing activities.

The study is designed to complement other evaluations that may be conducted by West Dorset and Weymouth & Portland Shared Services Partnership (SSP) and others in assessing the overall impact of *Broadchurch*.

³ Oxford Economics (2012) The Economic Impact of the UK Film Industry. Supported by the British Film Institute, Pinewood Shepperton plc, British Film Commission and Creative England. URL: <http://www.creativecoalitioncampaign.org.uk/images/uploads/bfi-economic-impact-of-the-uk-film-industry-2012-09-17.pdf>

⁴ See e.g. Gerrys, R. (2013) Bridport and West Bay boom thanks to *Broadchurch* and sunshine, Dorset Echo, 5th September. URL - http://www.dorsetecho.co.uk/archive/2013/09/05/10655881.Bridport_and_West_Bay_boom_thanks_to_Broadchurch_and_sunshine/ and: video on ITV.com: ITV drama 'Broadchurch' boosts Dorset tourism (March 2013): <http://www.itv.com/news/west/update/2013-03-25/itv-drama-broadchurch-boosts-dorset-tourism/>

2.0 BACKGROUND

This section gives a brief overview of *Broadchurch* and the major local marketing initiatives designed to promote the area to viewers wanting to visit the 'real' *Broadchurch*.

2.1 BROADCHURCH: THE TV SERIES

The eight-part thriller *Broadchurch*, starring David Tennant and Olivia Colman, was shown on prime time UK television over an eight-week period from Monday 4th March until Monday 22nd April 2013 by ITV. The filming of the outdoor shots took place in Clevedon, near Bristol, and West Bay, near Bridport, Dorset. These two locations were merged to create the fictional seaside town of *Broadchurch*, the setting for a thriller based on the investigation of the murder of an 11-year old boy and its effect on a community. However, the story was written to depict the Dorset coast, the home of the writer Chris Chibnall⁵. The viewing figures⁶ were considerably large at 10.46m viewers for Episode 1, and 9.07m viewers for the final episode⁷, which compares with the UK's biggest shows such as *X Factor*, *Strictly Come Dancing* and *Coronation Street*. It was described as "the biggest new drama since *Downton Abbey*" and "the most popular midweek drama since *Doc Martin*" by the Guardian⁸. Interestingly, both these series have generated huge film-induced tourism in their respective locations. The series has achieved critical and popular success, and to date has been nominated for a number of key awards (including three nominations in the National Television Awards in January 2014) and has won several coveted titles⁹. The story was said to have resulted in a "collective hysteria"¹⁰, becoming the topic of conversations and predictions of 'whodunnit'. In fact, the management of viewer engagement was a particularly clever part of the series, whereby no clues were given to what might be happening in the next part from week to week, nor was the identity of the killer leaked to the press. This resulted in a high level of media interest and was described by the Royal Television Society as a "cultural phenomenon"¹¹.

⁵ Playwright and screenwriter, notable for episodes of *Dr Who* (2007-2012), *Torchwood* (2006-08), *Law and Order: UK* (2009-10) and *Life on Mars* (2006-07), the film *United* (2011), and *The Great Train Robbery* (2014), among others

⁶ Official British Audience Research Board (BARB) combined figures for ITV, ITV HD and ITV+1 viewing data (see www.barb.co.uk)

⁷ Please note there is some variation in viewing figures as quoted in press

⁸ J. Plunkett (2013) <http://www.theguardian.com/media/2013/apr/22/itgv-Broadchurch-nation-guessing-end>

⁹ TV Choice Award 2013 – *Broadchurch* voted Best New Drama, while David Tennant won Best Actor; Freesat Awards 2013 Best British TV Programme or Series; Crime Thriller Awards 2013 – Best Actor, Best Actress, Best Supporting Actor and Best TV Show; Edinburgh International Television Festival - Best New Programme; National TV Awards 2014 nominated for Best Drama and Best TV Detective.

¹⁰ Radio Times (2013) <http://www.radiotimes.com/news/2013-09-26/Broadchurch-finale-the-us-twitter-reaction>

¹¹ M. Bell *ibid*

The series was also screened by BBC America (a small cable service in USA) and has attracted a cult following in the US¹². In late 2013, it was announced that an American adaptation (entitled *Gracepoint*) will be made starring David Tennant, while a second series for the UK market was planned for 2014 following the success of the first run. In addition, the rights to screen *Broadchurch* have been sold internationally and is at the time of writing being shown in a number of countries (see section 5.0).

2.1.1 WRITING AND FILMING BROADCHURCH

Filming locations in and around West Bay, including adjoining sections of the iconographic Jurassic Coast, featured heavily in the series, while the landscape (and characters relation with it) formed a prominent part of the story. While a substantial amount of filming took place in Clevedon and in a studio in Bristol, the Dorset location 'stole the show' in terms of media, viewer and subsequent tourist interest. The portrayal and striking cinematographic treatment of the coastal landscape, particularly the beach and distinctive cliffs at West Bay, appeared to captivate viewers who had seen the beautifully crafted shots of this unique landscape and wanted to find out where it was and, for some, to visit it. According to the writer, the aim of the series was to focus on a "terrible event happening in a beautiful place" typified in the Director, James Strong's words, to show a "quality of real life"¹³. Much inspiration was taken from the work of Thomas Hardy, whose literary works are centred on Dorset. Like in much of Hardy's work, the *Broadchurch* story was connected to the Dorset landscape, described by Graham (2013) as "lush and gorgeous, suffused with that almost ethereal south-west-coast-of-England light"¹⁴.

2.2 MARKETING BROADCHURCH

The SSP recognised the opportunity presented by *Broadchurch* at an early stage, and prepared an appropriate marketing campaign alongside the screening of the programme. Efforts to maximise the marketing benefits of *Broadchurch* for tourism in the area included consultation with the ITV press office, the production company and the screenwriter to ensure that promotional material in place to make the most of the opportunity. In brief, activities included:

- A *Broadchurch* webpage was set up on www.visit-dorset.com and was the most visited page on the website for March 2013. A *Broadchurch* specific pay-per-click campaign was run throughout the duration of the show, using key search terms and

¹² Radio Times (2013) *Broadchurch* named best TV show of 2013 by Radio Times critics. URL - <http://www.radiotimes.com/news/2013-12-27/Broadchurch-named-best-tv-show-of-2013-by-radio-times-critics?ref=Article.RelatedNews>, 27th December. ITV crime drama *Broadchurch* has been named the best TV show of 2013 by Radio Times critics. Critical and popular hit.

¹³ Broadcast (2013) Behind the scenes – *Broadchurch*, ITV. URL - <http://www.broadcastnow.co.uk/in-depth/Broadchurch-itv/5052431.article>

¹⁴ Anne Graham (2013) <http://www.radiotimes.com/news/2013-04-22/Broadchurch-the-perfect-tv-murder>

phases specific to the series and its filming locations. Website traffic to Visit-Dorset.com increased by over 200% in March compared to the same time the previous year and March also achieved record traffic for the website.

- A full colour 'Broadchurch Trail' leaflet was produced and made available from information centres and on visit-dorset.com, highlighting the major screen locations and where these could be found, along with essential tourist information to help visitors gain the most from their visit. Bridport TIC also gave visitors who requested a leaflet the opportunity to enter a prize draw to win a signed copy of the series on DVD;
- Web marketing campaigns, including social media (Facebook, Twitter and Pinterest), a Facebook competition giving Facebook fans of the Visit Dorset Facebook page a chance to win a DVD of the series signed by the writer and producer of the show, and an email campaign based on a database of 50,000 previous Dorset visitor enquirers. Awareness of Dorset also grew via social networking with vast increases in fans and followers to the Visit Dorset Facebook and Twitter accounts. *Broadchurch* was trending nationally on Twitter on many occasions while the series was showing with many people interested to know where it was filmed;
- A competition set up on www.visit-dorset.com giving visitors a chance to win a break in Dorset staying at accommodation used by the cast and crew or during filming on the show (including The Bull Hotel Bridport, Freshwater Beach Holiday Park and Highlands End Holiday Park);
- Working with the media, resulting in several high profile features in the national press, including The Radio Times (22 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.

2.2.1 THE BROADCHURCH EFFECT?

It is evident that the profile of Dorset as a visitor destination increased significantly and with immediate effect. Following Episode 1, *Broadchurch* was trending on Twitter and many people were keen to know where the programme had been filmed. The www.visit-dorset.com website saw a large spike in traffic at 10pm after the programme had finished. In an interview for Bridport News¹⁵, the writer Chris Chibnall said, "*The production's trump card is clearly the extraordinary Jurassic Coast. I hope we've captured the beauty, magic and mystery of the Dorset landscape*".

This report investigates the existence of a 'Broadchurch effect' in terms of how this viewing interest materialised in actual visits as perceived by businesses. Accordingly, the methodology and findings of the primary research study now follow.

¹⁵ Quoted in an exclusive by Anne Bell, 17th April 2013

http://www.bridportnews.co.uk/news/10358722.Broadchurch_creator_says__thank_you__to_Bridport_and_West_Bay/?ref=ar

3.0 METHODOLOGY

To assess the impact of *Broadchurch* on tourism-related business, a small-scale primary research study was designed and implemented. The categorisation of tourism-related businesses adopted a broad definition of business types including not just accommodation providers, but a wide range of tourism enterprises and services including visitor attractions, retail outlets, information centres, transport providers, bars, inns, restaurants and cafes. This broad approach would inevitably, and necessarily, cover some businesses outside the immediate geographic area touched by the filming of *Broadchurch* (i.e. West Bay) which might not perceive themselves to be associated with the very specific activities allied with viewing *Broadchurch* film locations. However, some assessment of the geographic spread of *Broadchurch*-related tourism is a useful gauge in assessing the ripple effect felt by businesses within the wider area, and the implications for marketing and economic development in terms of Council practice, both now and in future iterations of *Broadchurch* as well as other film/TV related opportunities.

Due to the relatively scattered population of tourism businesses in this predominantly rural/coastal locality, and given the need for prudence in research costs, the most appropriate mechanism for collecting information from businesses was through a self-completion questionnaire survey. A questionnaire was designed to capture the following aspects:

- ✓ Business characteristics (type, size);
- ✓ Geographic location of business;
- ✓ Business trends during 2013;
- ✓ Perceived impact of *Broadchurch* on individual business performance indicators;
- ✓ Effect of *Broadchurch* on inquiries and forward bookings (accommodation providers);
- ✓ Views on the role and impact of *Broadchurch* on tourism in the locality;
- ✓ Use of *Broadchurch* in individual business marketing;
- ✓ Awareness of marketing channels used to promote *Broadchurch*.

The questionnaire comprised an online version, made available for a restricted period via a suitable and secure online platform to those where an email address was held, and a paper version which was used in the absence of email contacts for businesses specifically in West Bay given the number of seasonally operated food kiosks which were not possible to contact electronically.

Tourism-related businesses in the survey area numbered approximately 200, and were drawn from:

- ✓ Advertisers on Visit-Dorset.com (Bridport and nearby area)
- ✓ Bridport and District Tourism Association
- ✓ West Dorset Holiday Parks Association

- ✓ Lyme Regis Trade Association
- ✓ Jurassic Coast Business Scheme Members (Bridport and nearby area)
- ✓ Local West Bay Trades

An email was sent to businesses with a covering letter explaining the purpose of the survey, explaining that it would take approximately 8 minutes to complete. The survey was mailed out on 1st October 2013 to coincide with the end of the main tourist season when business operators were likely to be less busy and more willing to complete a questionnaire. A follow-up email was sent to all businesses thanking those who has already responded and reminding those who had not responded that the survey was still open after 30 days of the initial email. The survey closed on 1st December. This process was managed by WDDC to comply with data protection. Seasonal businesses in West Bay that could not be contacted by email (i.e. takeaway food kiosks) were visited in person and asked to complete the survey. In total, 60 surveys were returned with an estimated response rate of 30% which is above average for a self-completion on-line survey (rates of less than 20% are very common in small tourism business surveys¹⁶). Of these 60 returns, 52 had sufficient data to be counted as useable.

¹⁶ See K. Hung & R. Law (2011) An overview of Internet-based surveys in hospitality and tourism journals' *Tourism Management*, 32 (4): 717–724 – study of 76 articles published in tourism and hospitality journals, the majority had less than 29% response rate.

4.0 FINDINGS

The survey findings are reported using descriptive statistics, including frequency counts, percentages (to communicate basic proportions in the data rather than statistically accurate summations that are normally associated with much larger surveys), measures of central tendency, and cross tabulations to identify and explain relationships in the dataset. Through most of this section, percentages are rounded to the nearest whole for clarity.

In order to establish how *Broadchurch* may have impacted businesses, key variables relating to the responding businesses are recognised which might help to establish or explain, or simply illuminate tentative relationships between the degree of impact on the business. These include:

- ✓ geographic location;
- ✓ business sub-sector;
- ✓ size of business (average turnover, number of employees).

Furthermore, these variables will help to understand business owner/manager:

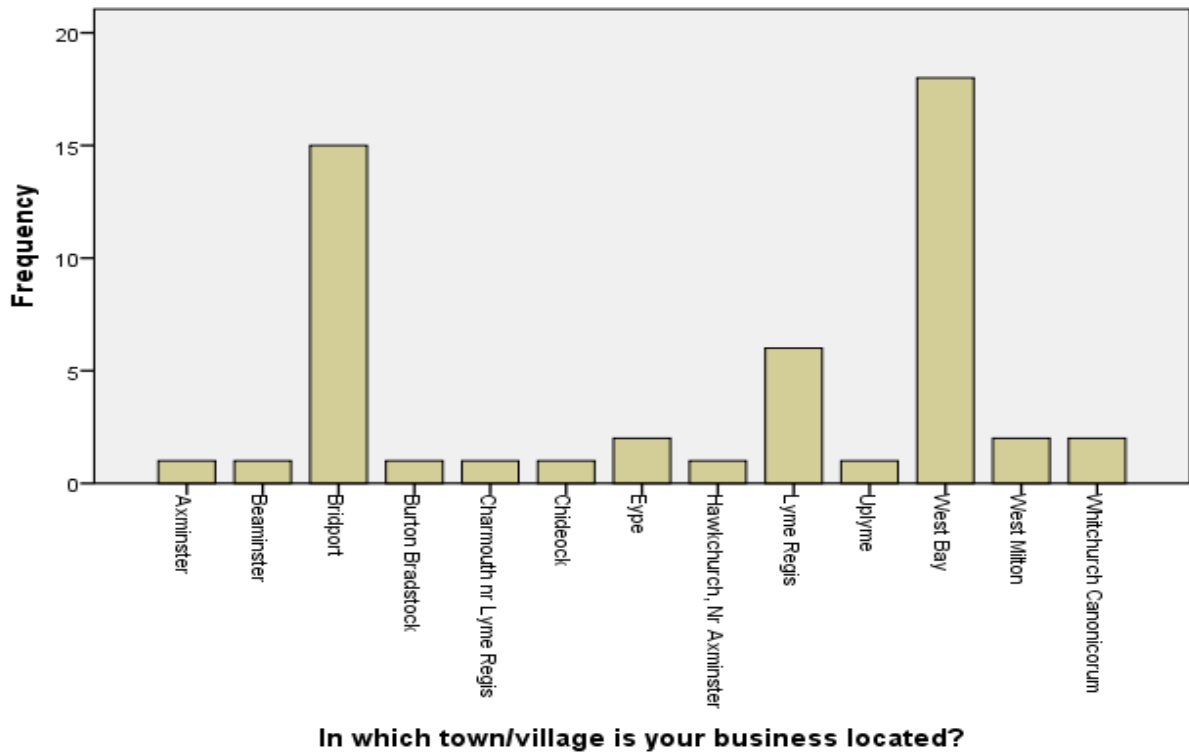
- ✓ awareness of marketing initiatives taken at the local authority level;
- ✓ perceptions of and responses to *Broadchurch* and its influence on tourism patterns;
- ✓ business innovations aligned to the *Broadchurch* theme.

4.1 GEOGRAPHIC LOCATION

Understanding the spatial impact of film-induced tourism is little understood but forms an integral part of shaping future marketing communications as well as justifying related economic development strategies. While this survey is based on only a small number of businesses, there are sufficient businesses to determine a broad geographical categorisation and to ascertain perceived impacts on that basis. Accordingly, the survey asked respondents to state the geographic location of their business, information which can identify the spatial elements of the *Broadchurch* effect.

- Figure 4.1 clearly shows that the majority of businesses responding to the survey were located in West Bay and Bridport. These are locations clearly at the centre of interest for *Broadchurch*-related visits and in total account for 60% of responses. However, responses were ascertained from businesses as far afield as Axminster and Lyme Regis, allowing for a broader spatial view of how *Broadchurch* affected tourism businesses in the wider West Dorset region. It is worth mentioning that responses from further afield are fewer in number: perhaps it is the case that businesses felt *Broadchurch* did not affect them and therefore dismissed the questionnaire of being little relevance to their operations.

FIGURE 4.1 GEOGRAPHIC LOCATIONS OF SURVEY RESPONDENTS



- Overall, three main groupings of respondent can be identified from the data: those located in West Bay, Bridport and other areas (Figure 4.2). Through this report, this broad three-way categorisation will be adopted to understand differences in business responses. Where appropriate, specific locations in ‘other’ areas will be identified if findings of particular note are established.

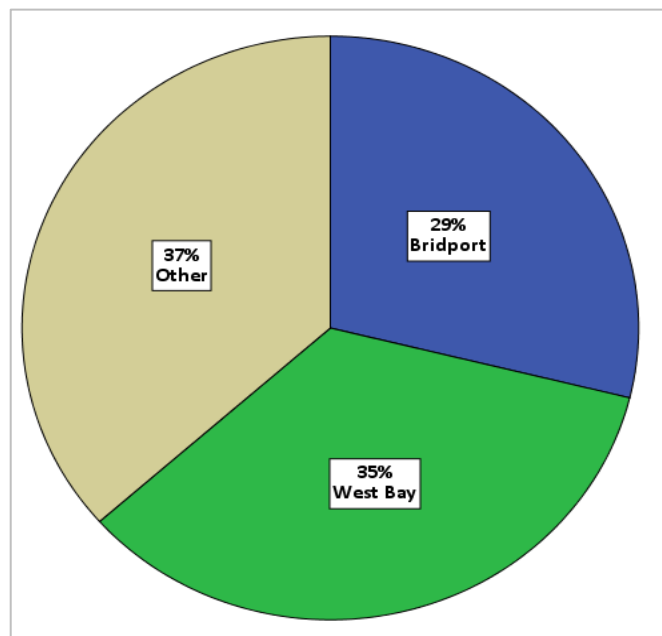


FIGURE 4.2 MAJOR GEOGRAPHIC AREAS REPRESENTED BY SURVEY RESPONDENTS

4.2 TYPES OF BUSINESS

A wide range of tourism-related businesses responded to the survey (see Table 4.1).

TABLE 4.1 PRINCIPAL BUSINESS ACTIVITY

	Frequency	Percent	Valid percent
Hotel	6	10.0	11.5
B&B/Guest house	9	15.0	17.3
Self-catering cottage/flat	5	8.3	9.6
Camping/caravan site	2	3.3	3.8
Holiday village/park	3	5.0	5.8
Visitor attraction	1	1.7	1.9
Outdoor recreation	2	3.3	3.8
Pub/Inn	3	5.0	5.8
Cafe	4	6.7	7.7
Restaurant	1	1.7	1.9
Food kiosk	7	11.7	13.5
Gift shop	1	1.7	1.9
Other retail shop	5	8.3	9.6
Tourist info/guide	3	5.0	5.8
Sub-total	52	86.7	100.0
Missing cases	8	13.3	
Total	60	100.0	

A significant number of businesses responding to the survey were accommodation-based businesses, followed by those whose principal activity was in food/catering. Figure 4.3 illustrates the broader grouping of sectors, and identifies accommodation providers as the single largest grouping of respondents, followed by food and drink businesses.

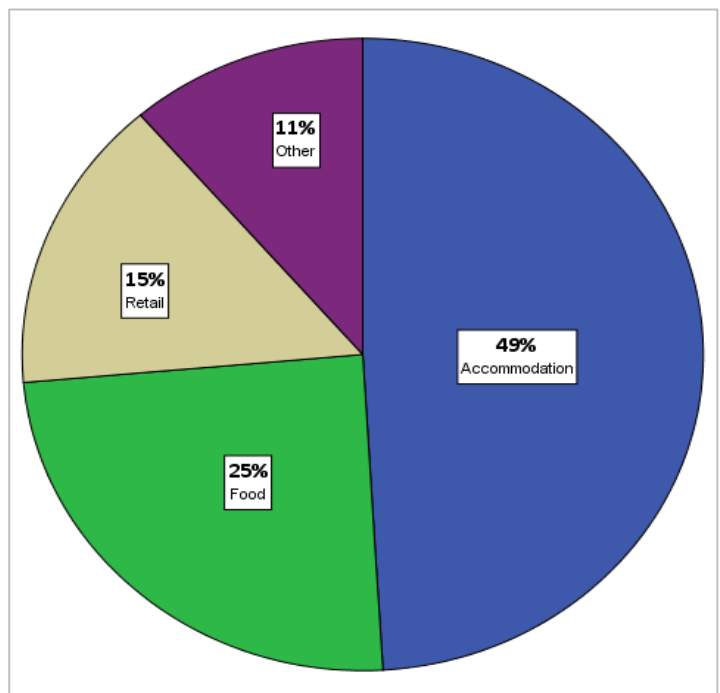


FIGURE 4.3 MAJOR BUSINESS SECTORS REPRESENTED IN SURVEY

4.3 BUSINESS SIZE

Tables 4.2 and 4.3 give some indication of the relative size of responding businesses based on the number of employees and average annual turnover respectively, although a number of businesses selected to not answer these questions. Table 4.2 indicates that the majority of respondents represent micro businesses and small-medium enterprises, with all but 2 businesses employing less than 50 staff.

TABLE 4.2 NUMBER OF EMPLOYEES

	Frequency	Percent	Valid percent
No employees other than owner(s)	10	16.7	21.7
1-9 employees	22	36.7	47.8
10-49 employees	12	20.0	26.1
50-249 employees	2	3.3	4.3
Sub-total	46	76.7	100
Missing cases	14	23.3	
Total	60	100.0	

While a larger number of missing cases are recorded in relation to average turnover, the data in Table 4.3 indicates a range of business types, but the majority of survey respondents appear to be relatively small businesses.

TABLE 4.3 AVERAGE ANNUAL TURNOVER (£)

	Frequency	Percent	Valid percent
Less than £25,000	4	6.7	9.8
£25,000-£49,999	5	8.3	12.2
£50,000-£99,999	7	11.7	17.1
£100,000-£499,999	7	11.7	17.1
£500,000-£999,999	3	5.0	7.3
£1m-£5m	3	5.0	7.3
Do not wish to say	12	20.0	29.3
Sub-total	41	68.3	100
Missing cases	19	31.7	
Total	60	100.0	

Due to the large proportion of businesses that did not provide a response to these questions, and the relative small numbers of respondents, using the variables of numbers of employees and turnover are not valid. However, this data provides useful background on its own in understanding the general patterns of response to the questions in the survey.

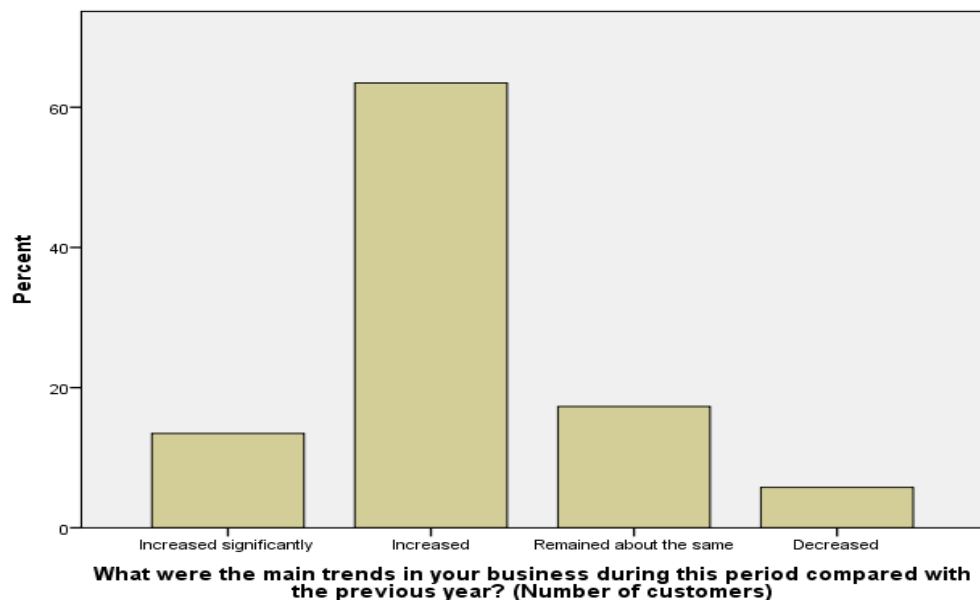
4.5 BUSINESS TRENDS IN 2013

Businesses were asked to reflect on key business trends from April to October 2013. This time period accounts for the screening of *Broadchurch* (March-April 2013) and the ensuing holiday season, taking in the two shoulder seasons and the main holiday peaks. Focusing on key business trends during this period, the businesses responding to the survey reported a boost in activity. For the majority of businesses, activity increased during this period. The following figures illustrate the following aspects of business activity: customer numbers, average spending, turnover and profitability:

4.5.1 CUSTOMER NUMBERS

- Overall, some 77% of respondents noted an increase in customer numbers, and for 14% this was a significant increase (see Figure 4.4). A small number (6%) reported a decrease: these were all self-catering providers.

FIGURE 4.4
CUSTOMER
NUMBERS
APRIL-
OCTOBER
2013

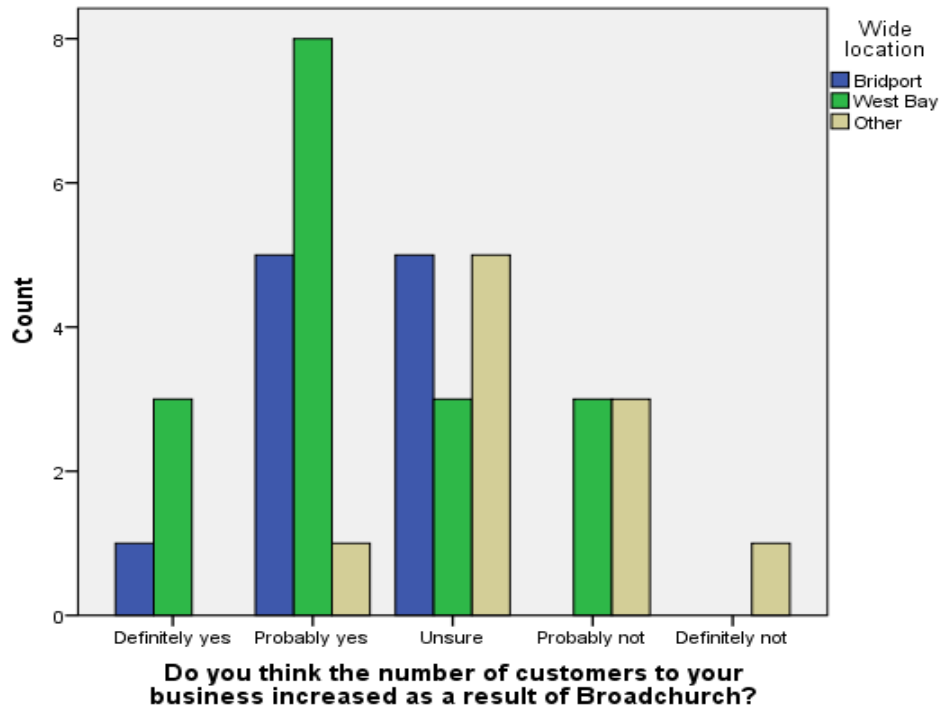


- In relation to businesses who saw an increase in customer numbers, 47% of these businesses (n=18) considered that this increase was either definitely or probably due to *Broadchurch*.

Customer numbers and geographic location

- In relation to specific spatial effects, Figure 4.5 identifies that a substantial number of businesses in West Bay received higher footfall, as well as businesses in Bridport. Businesses further afield appear to have not witnessed the same impact in customer numbers with the exception of one business in Chideock.

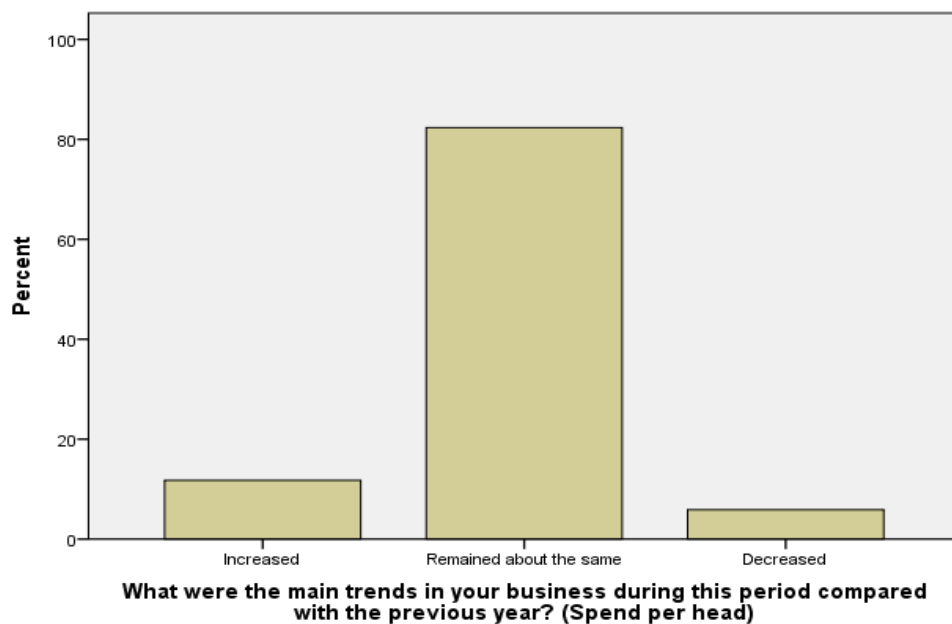
FIGURE 4.5
CUSTOMER
NUMBERS AND
THE
BROADCHURCH
EFFECT BY
GEOGRAPHIC
LOCATION



4.5.2 AVERAGE SPEND

- Overall, it appears that for most businesses (82%), average spend per head remained about the same as the previous year (Figure 4.6). More positively, for 12% of respondents, average spend had increased.

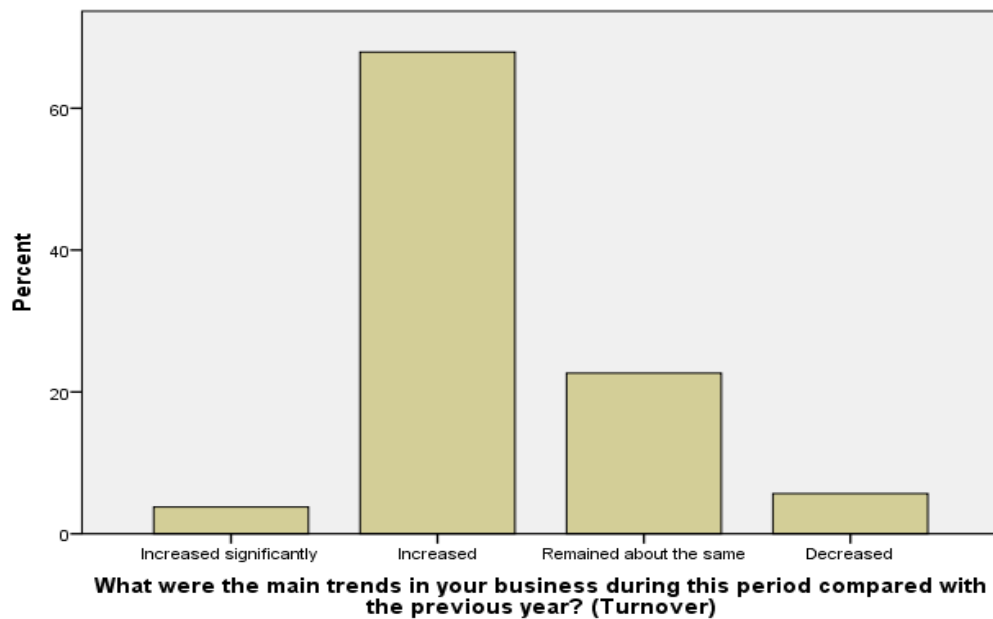
FIGURE 4.6 AVERAGE SPEND APRIL-OCTOBER 2013



4.5.3 TURNOVER

- Well over 70% of respondents reported an increase in turnover in 2013, with just over 20% stating that turnover remained about the same as the previous year (Figure 4.7). This is a significant finding bearing in mind the state of the economy, the squeeze on discretionary spending and consumer confidence, with research indicating that holidaymakers were cutting back on holiday spend by about 40% in 2013.¹⁷

FIGURE 4.7 TRENDS IN TURNOVER APRIL – OCTOBER 2013



Increases in turnover attributable to Broadchurch

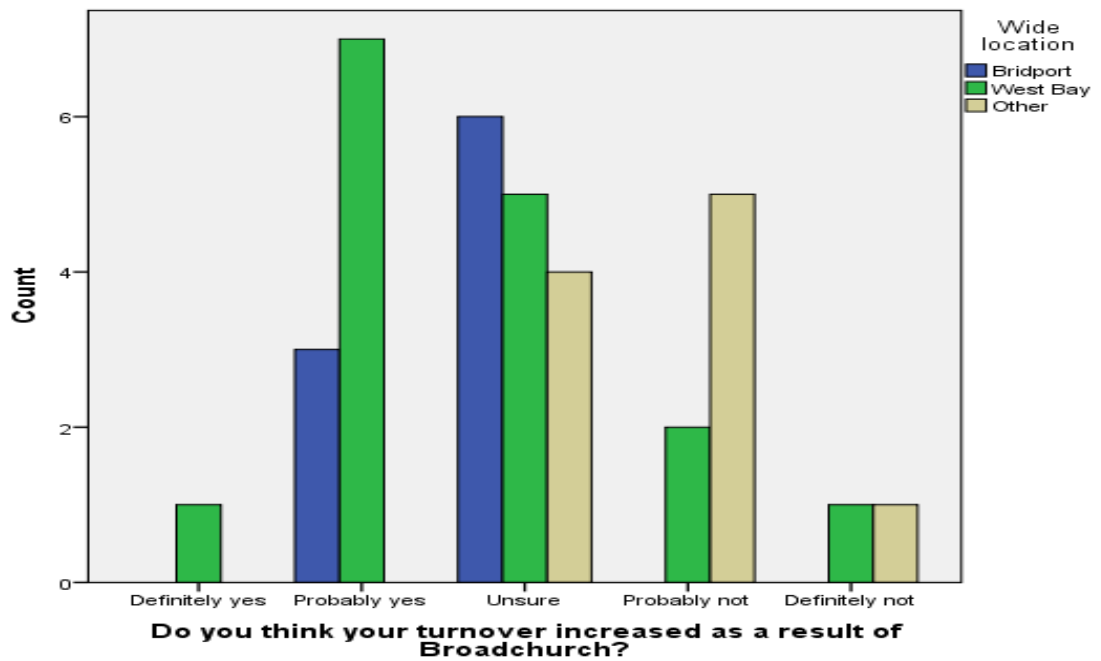
- Some 31% of the businesses reporting an increase in turnover thought that this increase could be attributable to *Broadchurch*. Some 29% thought that turnover had probably increased because of *Broadchurch*, while 3% stated that turnover had definitely increased as a result of the series.

Turnover and geographic location

- Businesses in West Bay reported that turnover had increased as a result of *Broadchurch*, although some were unsure and others thought that it had little or no effect. Businesses outside the West Bay or Bridport area in the main did not think that *Broadchurch* had increased their turnover, although a few were unsure (Figure 4.8).

¹⁷ VisitEngland (2013) *The Staycation: 2013 and Beyond*. Olive Insight http://www.visitengland.org/Images/Staycation%20Oct%202013%20Debrief_FINAL_tcm30-39132.pdf

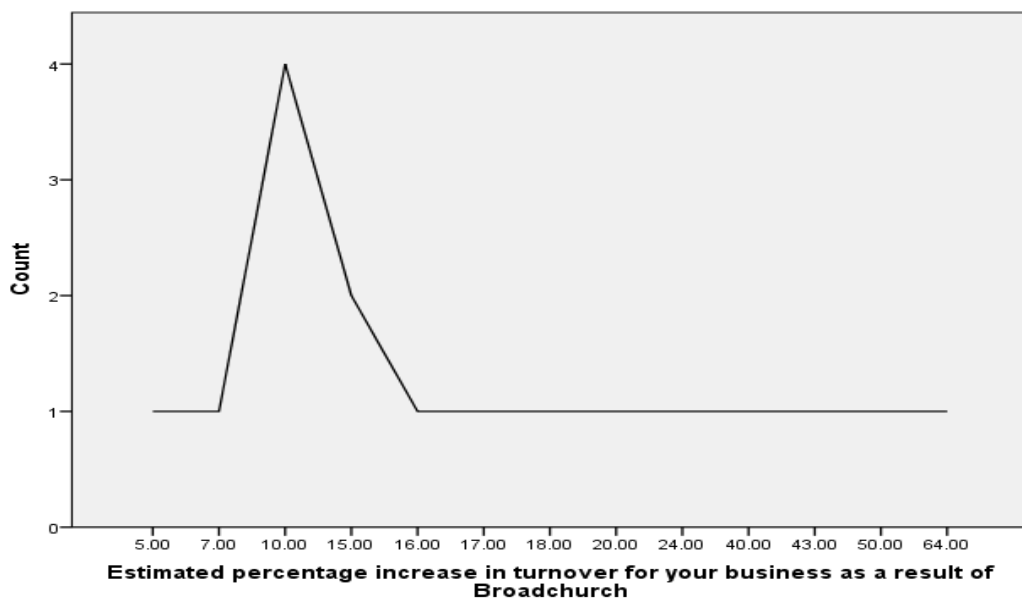
FIGURE 4.8 INCREASE IN TURNOVER BY GEOGRAPHIC LOCATION



Mean average increase in turnover

- The mean average increase in turnover as a result of *Broadchurch* as reported by the businesses in the sample was 22%, with the lowest increase at 5% and the highest at 64% (n=17). However, this is not a representative figure if one observes both the median (16%) and mode (10%) and Figure 4.9 further highlights that 10-15% increase in turnover is a more accurate number but the small number of responses should be observed in interpreting this data.

FIGURE 4.9 ESTIMATED INCREASE IN TURNOVER PER BUSINESS DUE TO *BROADCHURCH*



Explanations on observed increases in turnover

To add clarity as to why some businesses felt they saw an increase in turnover, more qualitative commentary was proffered by a number of businesses. Table 4.4 presents these verbatim explanations and observations on why businesses thought turnover had increased, with an additional note of the respondent's geographic location.

- The comments reveal that one of the major influences on tourist patterns in 2013 was the very good summer weather which brought visitors to the area with a few emphasising the importance of *Broadchurch* in increasing turnover.
- In this respect, there is a fairly 'patchy' effect with regard to *Broadchurch* in respect of turnover, particularly combined with other influences on tourism and socio-economic drivers, such as staycations and reduced discretionary income which have clearly affected tourism in the wider South-West of England, as well as the UK.
- Overall, it appears that *Broadchurch* was a useful starter to the season, but that extremely good weather is perceived to have determined the overall success of tourism in Dorset in 2013. VisitEngland research suggests that about 14% of domestic tourists may have changed their holiday plans as a result of the good summer weather (i.e. did not travel abroad or took more holidays in the UK).¹⁸

¹⁸VisitEngland *ibid*

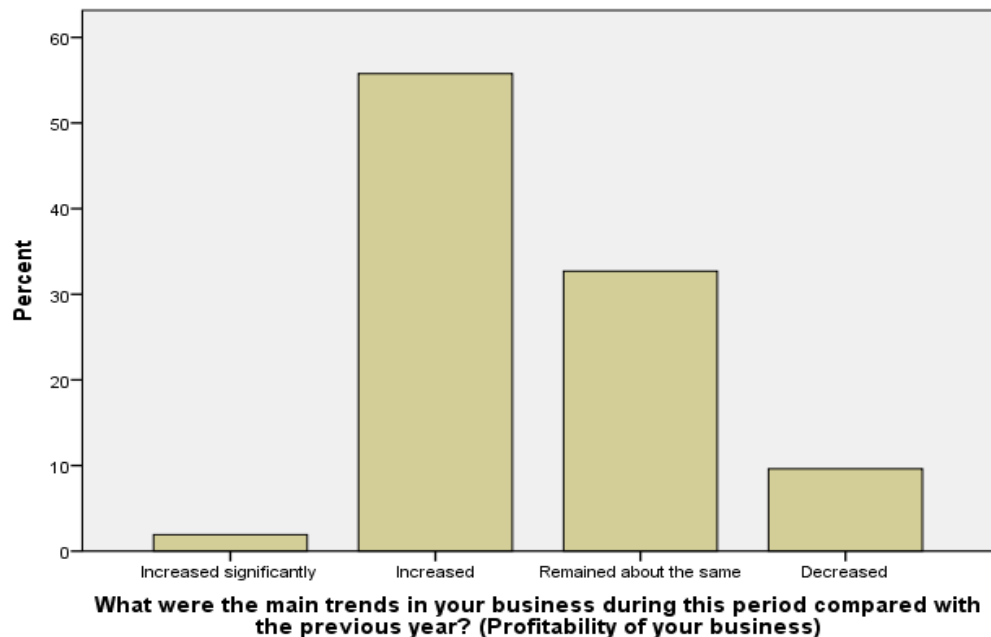
TABLE 4.4 BUSINESS OWNER/MANAGER EXPLANATIONS ON OBSERVED INCREASES IN TURNOVER

<i>The weather helped us</i>	West Bay
<i>Business levels increased in line with economic recovery and because the previous year was significantly down as a result of poor trading during the Olympics</i>	West Bay
<i>A summer with prolonged periods of hot, fine weather increased the numbers of visitors to our seaside town. The beach was extremely busy nearly every day... (West Bay)</i>	West Bay
<i>I only had two bookings for two weeks</i>	West Milton
<i>Had a few people asking about the filming but not aware of any extra bookings resulting from the series</i>	Eype
<i>The increase was for a very short period and was counteracted by the closing of access roads and carrying out of works by the local authority [which] made it virtually impossible to access our businesses during the start of the relevant period</i>	West Bay
<i>Better weather. No adverse Olympic Games /Jubilee effect</i>	Lyme Regis
<i>Beaminster Tunnel re-opening the most significant influence on the restaurant. Good weather and no Olympics have also made a difference</i>	Beaminster
<i>There was definitely more tourists around because of Broadchurch but they were mainly focused on West Bay</i>	Bridport
<i>No 1 factor - the weather!</i>	West Bay
<i>Bad weather last year, recession biting, customers cutting back on their holiday spend</i>	Burton Bradstock
<i>Increase mainly due to good weather</i>	Bridport
<i>We are a small growing business who is just starting to see real growth - many guests mentioned Broadchurch so there is a possibility it put the region in their mind when booking their short break, however many were uninterested in Broadchurch</i>	Charmouth
<i>The weather was fantastic compared to the previous year. We had more tourists in the shop but none mentioned Broadchurch</i>	Bridport
<i>I think the increase was due to the weather!!</i>	Chideock
<i>Last year numbers may have been affected by poor weather and the Olympics, deterring visitors. Guests have mentioned Broadchurch but only one couple specifically came to visit because of Broadchurch</i>	Bridport
<i>The "previous" year is a bad one to compare to. With the economic doom of the recession, the Olympics and terrible weather it made for a bad summer compared to this year 2013 with better economic stability and great weather</i>	Bridport
<i>No significant increase or decrease of business due to Broadchurch</i>	Hawkchurch
<i>People did not know that West Bay was the setting for Broadchurch and once told did visit but did not come just to be where it was filmed. We are also 6 miles from West Bay</i>	Whitchurch Canonicorum
<i>We have a one bedroomed chalet which we let for B & B, but we did notice a rise in enquiries during the time the series was on</i>	Lyme Regis
<i>March April and May are usually good for spontaneous stays if the weather is fine. The weather was fine but there were very few stays</i>	Whitchurch Canonicorum
<i>Business increased due mainly to the weather. However many customers did mention Broadchurch</i>	West Bay
<i>More customers but more people sharing a portion of cod and chips instead of one each</i>	West Bay
<i>Exceptional weather with good general facilities</i>	West Bay

4.5.4 PROFITABILITY

- Figure 4.10 identifies that overall business profitability increased for over 58% of the businesses surveyed, while just over 30% remained the same as last year.

FIGURE 4.10 PROFITABILITY OF BUSINESSES APRIL-OCTOBER 2013

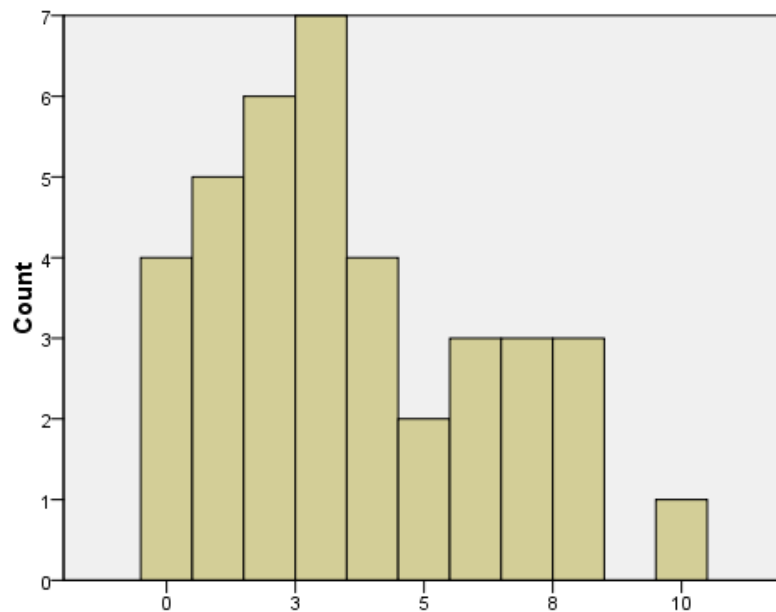


4.5.5 OPERATIONAL EFFECTS

- There appear to be no major impacts on the operation of businesses during the period. However, for some businesses the impact was more marked. In particular, it appears that the food-based enterprises in West Bay saw the most significant increases in business.
- Some 48% of businesses reported that they were busier than they would normally have expected. In terms of location:
 - over two-thirds of the businesses in West Bay said they were busier than normal;
 - just less than one-half of Bridport businesses were busier than normal;
 - only 15% of businesses in other areas said they were busier.
- In terms of the sectors most affected, some 73% of the food-based businesses in West Bay reported that they were busier than normal, while in Bridport all the retailers said they were busier than normal.

- Respondents whose business was busier than last year were asked to indicate on a scale from 0-10 the extent to which they thought this was due to *Broadchurch* (Figure 4.11). These responses provide a rough indication of general feeling among business owners as to the extent of the *Broadchurch* effect on their individual enterprise. The mean average calculated based on the scale of 0-10 was calculated at 3.61 (median 3, mode 3).

FIGURE 4.11 IF YOUR BUSINESS WAS BUSIER THIS YEAR, ON A SCALE OF 0-10 TO WHAT EXTENT DO YOU THINK THIS WAS DUE TO BROADCHURCH?



- In relation to Figure 4.11, in West Bay, a bi-modal response was identified, with a clustering around points three-to-four and six-to-eight. Hence, in West Bay, two groups of businesses exist – those where *Broadchurch* was perceived to have a relatively minor effect, and those where it had a considerably more important effect. Indeed, a score of ten was recorded by one West Bay business. For Bridport, many responses clustered around points 1-3. Not a response over five was recorded in other areas, with four ‘zeros’ recorded, i.e. *Broadchurch* was perceived to have no effect whatsoever. While this kind of scoring is a somewhat crude measure, it provides a reasonably clear response that *Broadchurch* was not considered to have an overriding effect on the levels of tourist activity through the year other than in West Bay.
- Only two (out of 39 relevant businesses) opened longer hours (non-accommodation businesses). Both these respondents were food establishments located in West Bay.

- Some 28% of businesses had to order in more goods/food to service customers. This included 44% of West Bay businesses, the majority of which were food-based businesses, and 20% of Bridport-based businesses but no businesses from outside the area.
- Overall, and perhaps as expected, this data indicates that West Bay witnessed the most significant rise in demand and consequent effect on business operations. However, that is not to say that the effect was not felt in other locations, and the *Broadchurch* effect on Bridport is detectable from the data.

4.5.6 USE OF BUSINESS DURING FILMING

- Many businesses helped to service needs during the filming of *Broadchurch* (Table 4.5). This period pre-dated the 2013 tourist season, and related to 2012. Nearly one-quarter of businesses were patronised by film crew, the single largest category of customer type. Both cast members and members of the public viewing the filming were also important customer groupings.

TABLE 4.5 USE OF BUSINESSES DURING FILMING

Was your business used during the filming by:	Count	Percent %	Percent of cases %
Cast members	9	12.3	17.6
Film crew	18	24.7	35.3
Series producers/directors	4	5.5	7.8
Journalists/other media	4	5.5	7.8
Members of the public viewing the filming	9	12.3	17.6
Other (please state)	4	5.5	7.8
Not used	25	34.2	49
Total	73	100	143.1

As might be expected, there is a distinct difference between geographic locales in terms of the impact on businesses during filming. In addition, there are some differences in this impact according to type of business.

- Overall, compared with Bridport and other areas (i.e. those outside the immediate vicinity of West Bay/Bridport), more businesses in West Bay reported use of their business in some way during the filming. In addition, a small number of businesses were involved in filming and/or supplying props to the film crew.

- In summary, the reported business effects during the filming period:
 - Accommodation sector: 4 out of the 5 businesses where cast members and the producers/director stayed were located in Bridport. However, film crew stayed across the whole area. In this respect, the accommodation sector was more likely to benefit more widely across the wider geographic area.
 - Food sector: reported impact on food businesses was confined solely to West Bay only, catering to cast, crew, producers/director and members of the public viewing the filming process.
 - Retail sector: retail enterprises in both West Bay and Bridport reported custom from cast, crew and journalists. Further, retailers in West Bay reported the patronage of members of the public viewing the filming.

4.6 BOOKING TRENDS FOR ACCOMMODATION

Accommodation providers were asked to report on increases in enquiries and bookings for short breaks and long holidays during 2013, as well as for ensuing holiday periods including October half-term (end of October), Christmas/New Year and for onward bookings into 2014.

- The resulting data appears to suggest a substantial increase in short breaks during 2013, but less so with regard to longer holidays. Early bookings for 2014 look reasonably promising at approximately 25% reporting increases in bookings, especially given that this survey was circulated in October/November, and prior to what is regarded as the main holiday booking season in mid-winter. These early bookings are spread equally throughout the survey area, not just in West Bay/Bridport. In summary, the reported impacts on bookings are:

(1) Short breaks (1-3 nights)

- 37% of accommodation providers saw an increase in enquiries for short breaks
- 35% saw an increase in bookings

- 21% reported an increase in enquiries
- 16% noted an increase in bookings

(2) Long holidays (4+ nights)

- 15% saw an increase in enquiries for longer breaks
- 11% saw an increase in bookings

(4) Christmas/New Year

- 18% reported an increase in enquiries
- 15% noted an increase in bookings

(3) October 2013 half-term

(5) 2014 season

- 25% reported an increase in enquiries for 2014
- 26% noted an increase in bookings

4.7 PERCEIVED IMPACT OF *BROADCHURCH*

To assess business perceptions and opinions of the impact of *Broadchurch*, respondents were asked to indicate their reactions to a number of key statements about views on *Broadchurch* and its effect on the area using a five-point Likert scale (on the basis of strongly disagree = 1 to strongly agree = 5 responses). The results indicate the following:

- Some 90% agreed or strongly agreed with the statement “I welcomed *Broadchurch* – it is the boost this area needs”. Some 46% strongly agreed, indicating there is a reasonably strong level of support among the businesses surveyed. Only one business disagreed.
- 92% agreed or strongly agreed that the series presented a positive landscape image to potential visitors, the remainder were unsure.
- Some 63% did not think that the dark storyline would deter visitors, although over 30% remained unsure.
- Some 52% of business agreed or strongly agreed that they had benefitted from *Broadchurch* (although only 5% strongly agreed). However, just over 30% remained unsure, with about 18% in disagreement.
- In terms of whether *Broadchurch* had extended the season in 2013, 42% were unsure, 19% agreed or strongly agreed while 41% disagreed.
- While 8% had concerns about *Broadchurch* being used to promote West Dorset, some 77% disagreed or strongly disagreed.
- 45% disagreed or strongly disagreed that *Broadchurch* had been over-promoted, although a large number (39%) were unsure.

From the above, it is evident that businesses welcomed the opportunity that *Broadchurch* presented in exhibiting the beauty of the coastal landscape and a large proportion were did not show any discontent in terms of the TV show being used to promote the area. Over one-half of the business felt they had benefitted from *Broadchurch* and the role it played in showcasing the area as a desirable place to visit.

4.7.1 AWARENESS, APPEAL AND PROFITABILITY

To further examine the relationship between appealing to viewers and resulting effects on tourism in the area, respondents were asked to comment on whether they thought

Broadchurch had increased the awareness, appeal and profitability of tourism in West Dorset (Table 4.6). This is in line with previous studies of film tourism¹⁹.

- Clearly, business owners/managers think that *Broadchurch* did increase awareness of West Dorset, and, to a slightly lesser extent, its appeal as a visitor destination. Conversely, a much smaller proportion believes that the profitability of tourism in the area had increased, although over half the sample was unsure. There are no significant differences in the answers given by businesses across geographic locations (West Bay, Bridport and other).

TABLE 4.6 PERCEPTION OF THE TOURISM EFFECT OF *BROADCHURCH* AS A MARKETING TOOL

<i>Broadchurch</i> has increased the...	YES	NO	UNSURE
Awareness of West Dorset	82.7%	7.7%	9.2%
Appeal of West Dorset	73.1%	7.7%	19.2%
Profitability of West Dorset	34.6%	13.5%	51.9%

- These findings indicate an overriding perception of the TV series as an effective mechanism for increasing the visibility of the locality among local businesses among potential visitors.

4.7.1.1 Longer term perception

In terms of whether it is perceived that *Broadchurch* will influence tourism decision-making beyond 2013, the findings indicate a mixed view, with a large degree of uncertainty.

- Some 33% agreed or strongly agreed that *Broadchurch* would not affect tourism trends in 2014, 21% disagreed or strongly disagreed (although a mere 2% strongly disagreed) but 46% were unsure. As such, about one-third of businesses feel that there will be no real impact in 2014.
- Furthermore, in terms of whether *Broadchurch* was considered likely to influence tourism in the longer term, 35% disagreed (12% strongly), 46% were unsure and 19% agreed. In other words, just over one-third of businesses thought that *Broadchurch*

¹⁹ J. Connell (2005a) 'What's the Story in Balamory?': The impacts of a children's TV programme on small tourism enterprises on the Isle of Mull, Scotland. *Journal of Sustainable Tourism*, 13 (3): 228-255.
 J. Connell (2005b) Toddlers, tourism and Tobermory: Destination marketing issues and television-induced tourism. *Tourism Management*, 26 (5): 763-776.

would not influence tourism patterns in the longer term. This issue is discussed further in Section 5.

4.7.2 INFLUENCE OF KEY FEATURES OF *BROADCHURCH* IN STIMULATING VISITS

Respondents were asked to scale their reaction to four aspects of *Broadchurch* on a scale from 0-100%. These scores were averaged to produce a broad indication of views on the relative importance of these influences:

- The landscape portrayal and production values of the show: mean average score 70%
- Editorial coverage on TV and other media about filming the show: mean average score 56%
- The popularity of the leading cast members: mean average score 57%
- Local marketing and promotions: mean average score 42%

This data suggests that respondents were likely to consider the attributes of the TV series and its production values in portraying the landscape qualities as the most important prompt for interest in the area.

4.8 AWARENESS OF MARKETING

Further questions were asked in relation to the marketing campaigns set up and run by the SSP (as outlined in section 2.2), first of all to establish the awareness among businesses of specific elements of the marketing programme, and secondly to assess whether businesses felt further marketing was necessary.

- The analysis reveals that awareness of the dedicated web page was much higher than other initiatives:
 - ✓ 23 (38%) were aware of the visit-dorset.com *Broadchurch* web page;
 - ✓ 15 (25%) were aware of the Facebook page;
 - ✓ 8 (13%) were aware of the viewer competition;
 - ✓ 8 (13%) were aware of the Twitter activity;
 - ✓ 3 (5%) were aware of Pinterest;
 - ✓ 2 (5%) were aware of other initiatives, including: fan web page and walking tour from Lyme Regis.
- While these figures indicate a relatively low awareness of specific campaigns run on *Broadchurch*, when asked if more marketing was required, only 8% respondents thought this was necessary. However, over 60% were unsure, indicating a high degree of uncertainty on this subject. One business stated that in terms of more marketing, the area should be made an attractive area for other film and TV projects, while another suggested a new website.

- The figure of 31% who think no more marketing is needed to capitalise on the *Broadchurch* market is perhaps indicative of a general feeling of indifference and maybe even opposition towards further marketing. The reason for this response is unclear.

4.8.1 USE OF *BROADCHURCH* IN BUSINESS MARKETING

- Some 39% of business stated that they had used *Broadchurch* in their own marketing, and a further 8% stated that they had not yet but planned to. With more than one-third of businesses referring to the TV series in their own marketing efforts, it seems that the association with *Broadchurch* was something that many felt to be attractive and/or worthwhile.
- The most common use was to feature or mention *Broadchurch* on their own web site, while a smaller number has used in social media blogs, twitter and on Tripadvisor. One business had used the theme in paid-for advertising, another had provided an offer and others stated that they talked to customers about the filming.

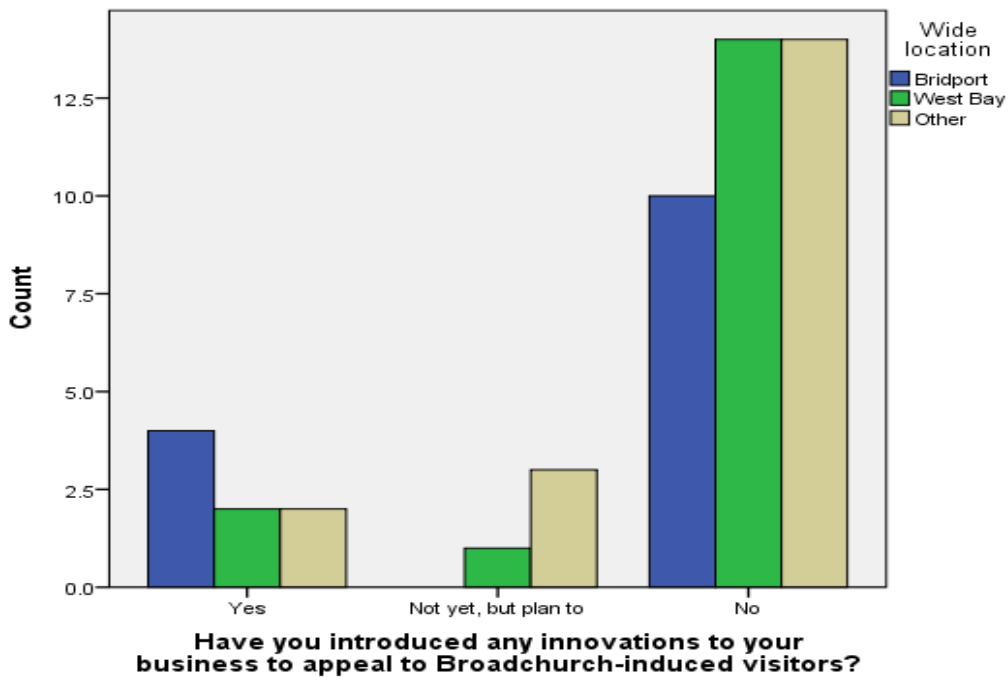
4.9 SERVICE AND PRODUCT INNOVATIONS BASED ON *BROADCHURCH*

Considering that *Broadchurch* was perhaps an unanticipated success in terms of drawing visitors to the area, it might not be expected that businesses would be quick to capitalise on opportunities, nor want to introduce more capital intensive adaptations given the pressures on small businesses at the current time. Further, many businesses may feel an association with a specific TV theme to be unsuitable or undesirable for their business.

- Anecdotally, a range of business activities linked with *Broadchurch* are known to have been developed, for example a Walking Tour developed by 'Literary Lyme walking Tours', and business-centred events such as a special screening of the last episode in Ellipse Café, which was itself featured in the filming.
- This research study found that a small number of businesses had developed service or product innovations to appeal to the film tourism market. Eight had introduced such innovations – including four accommodation businesses, one retail enterprise, one food outlet and two in the 'other' category.
- Some businesses clearly innovated around the theme, for instance in devising *Broadchurch* cocktails and a *Broadchurch* burger. Such innovations are important for both businesses looking to enhance business performance as well as visitor experiences of the place and its film associations, and for visitors looking for associations with the series to add a unique quality to, and memory of, their visit.

Figure 4.12 identifies that businesses in all areas adopted changes but that more businesses in Bridport engaged in this process, compared with other areas.

FIGURE 4.12 BUSINESS INNOVATION BY GEOGRAPHIC REGION



- In terms of business location, businesses in Bridport seemed to show a higher propensity to have introduced an adaptation to the *Broadchurch* theme, and surprisingly few in West Bay (Figure 4.12). In fact, more businesses outside the immediate area had or planned to introduce a *Broadchurch*-related feature.
- The forms of innovation to products and services are included in Table 4.7. This data indicates that the level of adaptation was quite small, and the reasons for this are unclear. However, some businesses clearly engaged with the *Broadchurch* theme in their marketing and service delivery.
- Clearly some of these innovations are linked with VisitDorset initiatives in working in partnership with local businesses as detailed in Section 2 of this report. As such the number of business originated innovations is limited in number. Such a finding is not uncommon in destinations where film-induced tourism is relatively new, and where business owners take a balanced view of the longevity of the appeal of the TV/film against the capital costs of product and service innovation.

TABLE 4.7 FORMS OF BUSINESS INNOVATION

The DVDs are now on sale and a <i>Broadchurch</i> information sheet has been produced and is free for interested visitors.
We have participated in a WDDC competition, offer a prize to stay on the holiday park featured in the programme.
Questionnaires & Competitions
Items on menu. <i>Broadchurch</i> themed descriptions!
Offered a competition prize with WDDC Used <i>Broadchurch</i> related comments in Social media Used <i>Broadchurch</i> themed cocktails
We created a special offer for <i>Broadchurch</i> viewers and spent considerable time creating a <i>Broadchurch</i> factsheet so guests could stay on a discounted rate and visit the areas where filming took place. We had one booking only and we are not sure if they booked because of <i>Broadchurch</i> or because it was a discounted offer.
maybe state that we are 6 miles from West Bay where <i>Broadchurch</i> was based and filmed
we created a ' <i>Broadchurch</i> burger'

5.0 CONCLUSIONS

This study has outlined the perceptions of tourism-related business owners/managers in the Bridport area of West Dorset in relation to *Broadchurch*-induced tourism and its impacts on business performance during the 2013 season.

5.1 SUMMARY

In summary, the major points that emerge from this research are:

- Business performance increased in the period April-October compared with the previous year in relation to customer numbers, turnover and profitability;
- The majority of businesses thought that *Broadchurch* was a good thing for the area; The portrayal of the landscape in the programme was seen as the most significant draw;
- Food service enterprises witnessed a major impact, especially those located in West Bay;
- For accommodation providers, there was an increase in enquiries and bookings for short breaks in 2013 and an increase in enquiries for bookings in 2014;
- Business owners/managers perceive that *Broadchurch* has increased awareness of West Dorset, and, to a slightly lesser extent, its appeal as a visitor destination. Conversely, a much smaller proportion believes that the profitability of tourism in the area has increased;
- In relation to marketing, 38% were aware of the visit-dorset.com *Broadchurch* web page. However, awareness of other marketing-related initiatives was lower;
- Some business had used or planned to use *Broadchurch* in their own marketing;
- A small number of businesses had adopted service or product innovations to appeal to the film tourism market;
- West Bay witnessed the most significant rise in visitor demand and effect on business operations. However, the effect was not solely confined to West Bay;
- However, while *Broadchurch* was viewed as an important contributor to overall business performance, good summer weather was perceived as a crucial factor in determining the success of the summer season in 2013.

5.2 LONGER-TERM EFFECTS AND BUSINESS PERCEPTIONS OF THE LONGEVITY OF FILM TOURISM

Critics of film tourism point to the limited duration of interest in single films and TV programmes as a disadvantage in sustaining long-term interest in tourism destinations. However, while film (specifically *film* rather than *TV*) tourism activity tends to reach peak

interest following the launch of a film, the enduring qualities of some films can draw visitors for many decades (see e.g. *The Sound of Music* and *Monty Python and the Holy Grail*) or in the case of a TV series, the termination of that series (e.g. *All Creatures Great and Small* and *Dad's Army*). However:

- A long-running TV series is more likely to sustain interest, given the likelihood of viewer interest in place, stories and characters and the opportunities afforded by long-term association for destination marketers in product placement or for studio tours. Additionally, new and repeat viewings through TV repeats on mainstream and other channels along with the release of pre-recorded video and box set DVDs help to sustain longer term interest. TV channels such as 'Yesterday' and 'Drama' have brought about renewed interest in a range of older TV dramas, such as *Bergerac*. A number of examples demonstrate the longevity of film tourism, although much evidence remains anecdotal and effects tend to be variable (see Table 5.1).
- Some films such as *Local Hero* and *Trainspotting* generated visitor interest some time after initial film release, with initiatives developed to cater for visitor demands many years later – for example, in the case of *Trainspotting*, tours were started in 2004 where the film was released in 1995. *Monty Python and the Holy Grail* still attracts a large number of 'cult' followers to the film site at Doune Castle (see Table 5.1).
- The length of time over which destinations can expect to receive increased numbers of visitors is variable. While there is no definitive research as yet, some studies and observations indicate that very positive effects on tourism numbers persist for about four to five years²⁰ following the release of a film or the ending of a series. A long-running TV series is more likely to sustain long-term interest, given the enhanced emotional relationship between viewer and characters, narratives and place (see e.g. the success of tourism in Goathland as a result of *Heartbeat*).²¹
- From existing research, film tourism effects are more likely to be long-lasting given the following conditions,²² which *Broadchurch* meets very well:

²⁰ R. Riley, D. Baker, D. and C. Van Doren (1998) Movie-induced tourism. *Annals of Tourism Research* 25: 919-935; A. Fernandez-Young and R. Young (2008) Measuring the effects of film and television on tourism to screen locations: A theoretical and empirical perspective. *Journal of Travel and Tourism Marketing*, 24 (2-3): 195-212.

²¹ J. Connell (2005b) Toddlers, tourism and Tobermory: Destination marketing issues and television-induced tourism. *Tourism Management*, 26 (5): 763-776.

²² Olsberg|SPI (2007) *How Film and TV Programmes Promote Tourism in the UK*, London: Film Council.

1. Where the location leaves a strong image in the viewer's mind;
2. In emotionally resonant productions, where characters are connected with place;
3. When the production achieves cult status;
4. When the production is part of a wider historical, literary or cinematic brand;
5. When filming focuses on historical and religious buildings, or rural villages with a strong image or identity.
6. When viewing is scheduled as 'Sunday night' television drama

5.3 INTERNATIONALISATION AND MARKETING IMPLICATIONS

At the time of writing, the screening of *Broadchurch* is spreading internationally, with the series about to be shown to audiences in the Netherlands, South Africa, the Republic of Ireland and Norway. It is possible that this might create interest in Dorset among viewers outside of the UK, with a possible second wave of interest in 2014. Marketing campaigns will need to be cognisant of this development, and although the size of this market may well be much smaller than the domestic demand seen in 2013, it may well bring different needs and demands of which local businesses might need to be aware.

For 2014, *Broadchurch* on DVD might help to prolong interest in the domestic market, and overseas markets may well be inspired to visit too. Interest in David Tennant's reprisal of the Alec Hardy role in the US version *Gracepoint* may well further stimulate interest in the original UK series and recall of the *Broadchurch* and its landscape setting.

Further, the planned new series of *Broadchurch*²³, which will undoubtedly be eagerly awaited by fans of the first series, will be an opportune time to capitalise on marketing initiatives. However, there seems to be a question hanging over the exact location of the new series so this will clearly need to be assessed before embarking on further investments.

²³ ITV Press Centre (2013) *Broadchurch* recommissioned for a second series http://www.itv.com/presscentre/press-releases/Broadchurch-recommissioned-second-series#.UtPv4rTGm_Q. second series, Mon 22 Apr 2013.

TABLE 5.1 LONG-TERM SCREEN ASSOCIATIONS AND VISITOR ACTIVITY

Location	Title	Type	Year of first release	Current activities
Doune Castle, Central Scotland	<i>Monty Python and the Holy Grail</i>	Film (but associated with comedy TV series <i>Monty Python's Flying Circus</i>)	1975	Film fans from all over the world contribute about one third of visitors to Doune Castle every year (2006 visitor numbers 35,401). An annual themed event is held every September for film fans (since 2004). The growth in visitor numbers to Doune Castle 2005-6 was 29.2%, compared with 2.1% growth in visits to all castles in Scotland. ²⁴
Portmeirion, North Wales	<i>The Prisoner</i>	Cult TV Series, 17 episodes	1967	About 10% of annual visitor numbers (250,000) are film fans. Shop in village sells <i>Prisoner</i> themed gifts. Annual convention held since 1978 for members of the Prisoner Appreciation Society (1,000 members globally).
Thirsk, North Yorkshire	<i>All Creatures Great and Small</i>	Two feature films based on the James Herriot novels Prime time Sunday night TV Series	1974-1975 1978-1990	Thirsk is home to <i>The World of James Herriot</i> , a visitor attraction based at the home of the infamous real-life vet, attracting about 45,000 visitors per year. The centre also portrays sets from the TV filming.
Kircudbright, South West Scotland	<i>The Wicker Man</i>	Film (cult horror/thriller)	1972	Since 2002, an annual weekend festival based loosely on the film has been held in July. 'The Wickerman Festival' offers cult music, dance and art. In 2006, 16,000 attendees were recorded, from a baseline of 5,000 in 2002.
Holmfirth, West Yorkshire	<i>Last of the Summer Wine</i>	TV comedy – longest running in the world	1973-2010	Industry built on strength of the programme. Exhibition, gift shop, Wrinkled Stocking Team Room, Sid's Café, merchandise, location tour, 10 mile vintage bus tour, online promotions

²⁴ Data extracted from the 2006 Visitor Attraction Monitor (VisitScotland)

Jersey	<i>Bergerac</i>	TV crime detective series	1981-1991	Remains one of the most important factors influencing a visit to Jersey, and particularly for first-time visitors. More important than a range of traditional advertising forms. ²⁵
Goathland, North Yorkshire	<i>Heartbeat</i>	TV police drama series	1991-2010	Visitor numbers grew from about 200,000 prior to Heartbeat to nearly 1.5m in 1995, stabilising at about 1.2m. ²⁶ Economic effect estimated at over £9m per year at height of popularity. ²⁷ Vintage bus tours, gifts, website
Thetford, Norfolk	<i>Dad's Army</i>	TV comedy (and some radio episodes) Film	1968-1977 1971	Dad's Army experience, walking tour, museum, stage shows, statue of Captain Mainwaring (2010)

Source adapted and extended from Connell and Meyer (2009)²⁸

²⁵ Oxera (2012) *Tourism in Jersey*. Prepared for the States of Jersey

<http://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Tourism%20in%20Jersey%2020120706%20CS.pdf>

²⁶ B. Breakell (2002) Goathland – Visitor Volume and Expenditure. North York Moors National Park.

²⁷ M. Evans (2004) The Golden Age of Film Tourism, Insights, VisitBritain.

²⁸ J. Connell and D. Meyer (2009) *Balamory* revisited: An evaluation of the screen tourism destination-tourist nexus, *Tourism Management*, 30 (2): 194-207.

