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Capitalising on Screen Tourism

The Attraction of Screen Destinations

Baseline Report Assessing Best Practice

INTERREG IVC
INNOVATION & ENVIRONMENT
REGIONS OF EUROPE SHARING SOLUTIONS

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Executive Summary







Introduction to EuroScreen

Screen tourism demonstrates the power of film, TV and commercials, as well as games, mobile and internet-based content in attracting tourists to visit destinations seen on screen. It is evidenced through countless productions shot and set in locations all over the world.

EuroScreen is a project specifically designed to capitalise on the major economic and cultural opportunities presented through screen tourism. The three year project, co-financed by the European Regional Development Fund and made possible by the INTERREG IVC programme, aims to exploit the screen sector as a proven catalyst for tourism development through the alignment of policies between the screen and tourism industries. By establishing clear links between the two industries, EuroScreen aims to increase screen and tourism SMEs' understanding of the benefits of working together, thus encouraging cross sector collaboration.

The EuroScreen partnership consists of nine organisations across eight different EU regions, including regional development agencies, film commissions and a higher education institution:

- Film London (UK), Lead Partner
- Apulia Film Commission (Italy)
- Bucharest Ilfov Regional Development Agency (Romania)
- Fondazzjoni Temi Zammit (Malta)
- Lund University, Department of Service Management (Sweden)
- Maribor Development Agency (Slovenia)
- Promalaga (Spain)
- Rzeszow Regional Development Agency (Poland)
- Ystad Municipality (Sweden)

EuroScreen's Key Challenges: Bringing the Screen and Tourism Sectors Together

EuroScreen aims to enhance tourism development through the alignment of policies between the screen and tourism industries. A key challenge for the project is to address the current gap in relevant policy makers' understanding of the screen sector's economic benefits and positive impact on tourism. This will encourage increased cross sector collaborations in delivering new and innovative policies and initiatives.

The study of "screen tourism", or tourism induced directly or indirectly by a destination or attraction being viewed on screen, is relatively new in tourism research. A further challenge therefore lies in the need for credible economic impact figures to support existing evidence. EuroScreen aims to develop a framework to assist the participating regions to identify and measure the screen sector's economic impact on tourism.

The screen and tourism industries each face their own challenges, which have been taken into consideration by the EuroScreen project and partners through the development of this project. The growth of the screen industry is rapid, continually employing new technologies and playing an increasingly significant role in the economy. This requires a highly competitive skills base and an investment in fiscal incentives and screen agencies, both regionally and nationally, to ensure an ability to win business in the global marketplace. The growth of the tourism sector is also rising steadily, whilst demonstrating a wide regional variation. It is a complex industry with its huge range of stakeholders facing increasing global competition as a result of transportation, communication, new markets and economic recession.

In short, the key challenge for EuroScreen is to define and develop effective partnerships between the screen and tourism sectors to address the current potential for missed opportunities in destinations being able to enhance their development and economic impact.

Aims and Methodology of the EuroScreen Baseline Study

The EuroScreen baseline study is an assessment and comparative study of screen tourism activity across the project's eight participating regions. The study has several aims:

- To ensure that partners understand the existing screen tourism activities, policies and experiences in all EuroScreen regions.
- To explore and analyse existing practices and policies to support the development of tourism and screen industries as well as considering the current opportunities for SMEs within the screen tourism sector.
- To identify five good practices which can be transferred in order to enable screen tourism development in under-exploited regions.

The methodology of the study took a qualitative approach. Questionnaires were completed by all EuroScreen partners (apart from Lund University who carried out the research), as well as some relevant external organisations within the partner countries, in order to gather their experiences of screen tourism activity. The questionnaires were complemented by interviews with stakeholders identified by the partners (see Appendix 3).

Setting the Scene for the EuroScreen Partnership

The EuroScreen partnership is committed to the development of strategies to encourage screen production and tourism generated through the use of new and existing screen products. There is a shared experience among partners that opportunities for screen tourism are at risk of being missed and that economic impact could be boosted significantly by increased collaboration between the screen and tourism sectors.

The partnership comprises a diverse group of regions from both urban and rural environments across the EU, all with the potential for growth. There is a balance between those regions with advanced policies and experience in screen tourism and those which have not yet had the opportunity to develop policies or activity specifically in this area.

EuroScreen brings together regions with complementary levels of expertise with the aim of supporting the exchange and transfer of information and best practice relating to screen tourism in order to strengthen the economic profiles and competitiveness of all participating regions.

The variation of partners' experience relating to the screen and tourism sectors is analysed in the EuroScreen baseline study. There are some regions which have extensive knowledge of the screen sector but limited experience working on tourism development (for example London and Bucharest) and there are some regions which have minimal knowledge of the screen sector but a lot of experience in tourism (for example Maribor). There is additional regional variation in the extent to which tourism infrastructures already exist, all of which demonstrates the importance of EuroScreen's aim to develop both screen products and tourism products in order to allow all regions to exploit their existing resources.

EuroScreen Baseline Study Findings

Economics:

The value of film production, including direct revenue generation and beneficial impact on employment and the local economy, has been demonstrated by extensive research and studies. Oxford Economics reports that in 2011 the UK film industry had a total economic impact of over £4.6 billion (approx. €5.4 billion) to UK GDP and over £1.3 billion (approx. €1,5 billion) to the Exchequer (gross of tax relief and other fiscal support). It also created the equivalent of 117,400 full-time jobs in the UK.

In addition to the direct value of film production itself, the long term economic benefit provided by tourism as a result of visits to a destination seen on screen, is also evident. A regional example of this can be found in the case of Swedish town Ystad, well known for its *Wallander* productions. Since filming began in 2004 the town has increased its tourism economic turnover by 75% to 781 million SEK (approx. €89.6 million) in 2012. The number of full-time employees has increased by 45% and the *Wallander* films have an estimated PR value of more than 584 million SEK (approx. €67 million).

Whilst there are countless examples worldwide that illustrate a clear growth in tourism after a destination has been seen on screen, the direct correlation and the economic impacts are consistently difficult to measure. Visits to a destination may increase directly after the release of a film but more often are less immediate, with screen products having an ongoing effect on the image of the destination, creating a motivation to visit a place in the future and thus a delayed economic impact. Additionally, whilst it may be easy to measure the impact at a single attraction such as a castle, chapel, museum or guided tour where tickets are issued and visits are monitored, the measurement of the impact on towns and cities is much more complex. Tourists drawn to those destinations cite numerous reasons for their visit, making it difficult to distinguish the number of additional visits created specifically through screen products.

Management:

In order to attract screen productions to a destination, incentives such as tax reliefs and film funds are used. In considering screen tourism policies it is important to attract productions with the potential for tourism development, which really showcase a destination. Such forward thinking can be valuable, with a good example being found in Malta where the Malta Tourism Authority offers a cash incentive, as well as logistical support, to screen productions that portray "Malta as Malta" on the understanding that this is highly beneficial in terms of tourism.

In addition to tax reliefs or cash rebates the other common incentive is film funds. In Europe there is a network of regional film funds called Cine-Regio: the network is constantly growing and at present it represents 41 regional film funds from 12 EU Member States, in addition to Norway and Switzerland.

Besides incentives, partnerships and proactive planning are crucial to the successful development of long lasting and sustainable screen tourism. Effective strategic partnerships can take place on a regional political level, between tourism destination marketing organisations and production companies or film commissions. Since all places are unique it is important to identify specific stakeholders for the development of screen tourism in each individual destination and the closer the contact between the different stakeholders the more beneficial the outcomes for all involved.

Destination Marketing:

Screen products are increasingly used by tourism destination marketing organisations to market their destination. Screen tourism, with its potential for related marketing campaigns, is a global phenomenon and money is invested in these activities with the aim of increasing awareness of the destination brand and converting viewers of screen products into future tourists.

The Lord of The Rings trilogy provides a strong example with the number of international visitors to New Zealand increasing by 52% between 1999 and 2008. The largest increase occurred up to 2004, the year after the final film was released. This equated to an annual growth rate of 4.8%, which was higher than the average global growth rate during the same period. In an international visitor study 6% cited that *The Lord of the Rings* trilogy was one of the main reasons for travelling to New Zealand, proving a profound impact of the brand and awareness of the country as a visitor destination.

A major consideration for destination marketing is the selection of the strongest screen products, usually with a clear geographical connection in the narrative and displaying easily identifiable or iconic locations which are accessible to visitors. In order to capitalise on the exposure of a destination in a screen product it is important to package it in an attractive way which enables tourists to access information easily and encourages them to explore the destination.

Promotion through screen products also provides the potential to access new and specific tourist markets. For example, Visit Scotland reached out to the family market by investing £7 million (approx. €8.1 million) into the promotion of Scotland via the animated Disney and Pixar film *Brave*, through a campaign including a TV and cinema advert, a new website dedicated to the film as well as through marketing and other events.

Screen Tourists:

The perception of destinations is often influenced by a range of products, including screen products, which impact on tourists' expectation of the place and influence their choice of activities. The more influences that a tourist is exposed to, the more complex is the image created. For a smaller destination like a village or a single attraction the screen product may be the only source of influence, whereas for a city it is difficult for the tourist to pinpoint a single media product as the motivating driver.

The landscape and scenery within a screen product is one of the key factors for generating interest in visiting. Other contributing factors include the offer of a unique, fun and quirky visitor experience, though reasons differ depending on the type of visitor, ranging from day-trippers drawn to a specific attraction to tourists on extended vacations with numerous reasons for travelling to an international city.

A study of Japanese tourists' image of the UK showed that popular culture such as screen products enhanced an already perceived interest in the destination. Then when it came to influences, 70% of Japanese tourists stated that film and TV were the two most important sources for information about the destination.

Tourist Product Development:

There are many products developed for screen tourists. A majority of these are developed by official bodies with an apparent lack of such activities being developed by private businesses. Throughout the EuroScreen partnership there is a recognised need for further understanding and engagement from local businesses to develop screen tourism products.

Impact on screen tourism can be achieved through both small and large investments and it is important to raise awareness among local businesses that developing new tourist products is worthwhile and does result in direct economic impact.

The range of screen tourism products is getting wider, with new media platforms providing increased accessibility to user-generated content and interactivity. "British Film Locations", a free mobile phone app launched by Visit Britain in 2009, is a good example. The app promotes British film locations by allowing users to upload their own location pictures and engage with their social media networks instantly through the app. It includes 332 film locations, of which 68% of the film locations are in London, and has the ability to promote certain films that link to other promotional campaigns. The first app received a lot of media attention and was the most downloaded travel app in December 2009 with 50,000 downloads. In the autumn of 2012 the app featured *Skyfall* and received over 100,000 downloads.

Conclusions

Best Practice:

Based on the analysis of screen tourism experience within the EuroScreen partnership, in addition to relevant regional, national and international examples included in the baseline study, five best practices emerge as essential for successful work in the development of screen tourism:

- Policy Initiatives – essential for creating a long-term effect since policies trigger development activities and demonstrate a commitment to funding and resourcing work in this area.
- Strategic Partnerships (public-public) – in order to fulfil the developed policies there is a need for ongoing collaboration between public organisations and stakeholders which are far more effective than short-term partnerships for one-off projects.
- Strategic Partnerships (public-private) – there is a need for strategic partnerships between the public and private sector since the private sector often delivers services to tourists. Crucially, this includes partnerships with production companies, for example to secure access to publicity materials.
- Destination Development – the initiated policies and the resulting strategic partnerships create a sustained impact on the overall destination development, including increased visitor figures, product development and also benefit the local community and SMEs.
- Commercial operators, SMEs and other organisations – private sector initiatives and the creation of new tourist products need to be encouraged in order to capitalise on the interest for screen tourism.

Concluding Remarks:

The EuroScreen baseline study identifies that although some screen tourism policies are already in place, with partnerships and destination development in progress, the public sector has not succeeded in engaging the private sector in the development process. Destinations that want to develop screen tourism therefore need further strategies.

The challenge for the future is to develop strategies that engage with the private sector and in particular SMEs. It is vital to recognise potential stakeholders within each destination and to explore how they can be beneficial to each other and to tourism development. Currently many of the policies and collaborations are isolated interventions with limited overall effect as well as a lack of long-term commitment. There is therefore a need to develop strategies that result in sustainable destination development.

It is also important to create an awareness of the screen tourism phenomenon and the potential new business that can be gained through new products. The EuroScreen project will publish a set of case studies with the aim of attracting the private sector's attention as well as inspiring public organisations which want to develop their own screen tourism initiatives.

The final challenge that has been identified in this report is the complex nature of measuring the impact that screen products have on tourism and the problem that this presents in terms of engaging stakeholders with accurate statistics. The EuroScreen project therefore proposes to assess potential tools to determine the economic impact of a screen production, demonstrating the placement value for the destination.

To conclude, this report shows that there are many good practices already established that can be used as inspiration for future screen tourism work. However, there are clear challenges in moving forward with this work, with key priorities relating to engagement with SMEs and the need for an effective means of measuring economic impact.

1. Introduction

Background

Rosslyn Chapel, outside Edinburgh in Scotland, is a small countryside chapel founded in the 15th century. Over the last decade it has become a major tourist attraction due to its starring role in *The Da Vinci Code*. Before the release of Dan Brown's novel in 2003 the chapel had 35,000 visitors a year. This figure reached a peak of 170,000 in 2006, following the release of the blockbuster film starring Tom Hanks. Today the chapel still achieves more than 100,000 visitors annually and major investments have been made to continue to attract and cater for all of these additional visitors. In 2011 a new visitor centre opened that hosts interactive displays about the Chapel, a coffee shop and gift shop.[1]

The potential of films, TV, commercials and other screen products such as games, mobile and internet based content in attracting tourists to visit a destination seen on screen, is clearly evident in a huge range of products and destinations all over the world. It can be demonstrated by a breadth of examples from across the globe that illustrate the effect of screen products on tourism. Just a few such examples include *The Sound of Music* in Salzburg, *Notting Hill* in London, the TV series and film *Wallander* in Ystad, as well as more recent productions such as *Downton Abbey, Harry Potter* and *The Bridge*. While anecdotal evidence about the impact of film and television on tourism exists, credible studies and figures relating to crucial economic impact are often lacking. Without this information there is often a knowledge gap among policy-makers when it comes to understanding the screen sector's[2] huge potential in terms of driving economic growth through tourism.

EuroScreen is a three year project funded by the INTERREG IVC programme which aims to align policies between the screen sector and the tourism industry. The basis of EuroScreen is the belief in the positive spill-over effects between the film sector and the tourism industry. EuroScreen aspires to take advantage of the screen industry as a proven catalyst for tourism development, undertaking an exchange and transfer of good practice and working with businesses in the sector. The EuroScreen partnership consists of nine organisations across eight regions in the EU (see Appendix 1). The partners have different levels of experience in screen tourism[3] and will be further presented in chapter 2.

Key Challenges for the Screen Sector

The European screen sector (broadcasting TV, radio, film sector) largely consists of very small enterprises, comprising 80% of SMEs[4] and micro-SMEs. The screen sector has been growing faster than the wider economy, and its importance is of ever-increasing significance due to the rapid shift towards a digital society, where Internet and mobile technologies are fuelling the consumption of audio-visual content around the world. Today, the European audio visual industry is worth an estimated €107.4bn and provides 1.2m highly qualified jobs in Europe. The sector is part of the cultural and creative industries which, as a whole, represent 4.5% of EU GDP and provide 8.5m jobs.[5]

Screen sector agencies exist at a regional and national level to attract inward investment to their relevant regions/nations and work closely with the local film and TV production industry to facilitate filming on the ground. They predominately have an economic mission relating to growth and job creation as well as talent development but they often also play a cultural role.

The key challenges in general for the screen sector agencies, e.g. national and regional film commissions, are:

- Increasing global competition with national and regional governments offering incentives and funds to attract productions to their territory, especially relevant to the film industry which is mobile and able to set up anywhere.
- In the face of globalisation a lot of territories outside Europe compete for production with territories where costs are much lower than in Europe (e.g. South Africa, Argentina, Brazil, India etc.).
- With a rapidly changing film industry in the face of digitisation and convergence, regions and nations face challenges in terms of ensuring that their skills base remains competitive.
- As a result of cut backs over recent years, most screen agencies, regional and national, have reduced resources available to attract and facilitate productions and market or promote their offer on the global market place.
- Most screen agencies are small companies with very limited resources and don't have the capacity to collect and analyse data and demonstrate the value of their work in terms of return on investment. Agencies predominantly collect data with regards to production budgets and location expenditure but

1. *Månsson (2009); Rosslyn Chapel (2013) www.Rosslynchapel.com*
2. *The screen sector includes industries that are involved in the production of screen content such as e.g. film, TV, animation, commercials and games.*
3. *Screen tourism is tourism induced directly or indirectly by a destination or attraction being viewed on screen, including film, TV, commercials, video game and internet.*
4. *Small and medium-sized enterprises*
5. *Media Desk UK (2012) http://mediadeskuk.eu/assets/Uploads/Downloads/MediaSurveyA416pp.pdf*

have no data with regards to secondary economic impacts and the longer term value of productions shot in their territories and their impact on other industries such as tourism.
- Overall production budgets are decreasing, unless they are major studio productions or blockbusters.
- The production industry is fairly unique in its set up, working predominantly with freelancers and companies set up specifically for the purpose of a production. Often this does not fit with the criteria and methodologies of how governments expect sectors to evaluate their contribution to GDP.
- Sometimes film production is still seen as "culture" rather than as "business" and can therefore be at risk in times of financial cut backs and subject to further budget reductions.
- Distribution in Europe is a key challenge as films don't travel well across European territories.

Key Challenges for the Tourism Industry

The tourism industry is generally said to be one of the best industries in the world in terms of its positive impact on job creation. The potential of the industry is also said to be high: according to statistics from UNWTO, average global travelling has increased by 4% yearly since World War 2. The tourism industry represents 5% of EU GDP and generates 4.3% of all EU jobs (9.7 million) and this figure is steadily rising.[6] However, it is also an industry which inevitably shows large regional variation. It is a very complex industry, which involves many stakeholders, whose interests range from major infrastructure to service facilities and attractions. A further challenge to the industry is the importance of identifying the different drivers and motives for travelling.

Public sector tourism agencies are faced with the following challenges:

- Increasing global competition, partly as a result of faster and cheaper transport as well as faster communications. New low-cost destinations, mainly outside Europe, competing with well-established destinations.
- The emergence of new tourism markets (especially China and India).
- The current economic recession, with potential to slow down tourism growth and change travelling patterns.
- Increasing importance of place marketing or place development. It is important for destinations to stand out in the (global) competition and to have clear strategies, images, brands and saleable attractions.
- New "windows"; many internet tools have become standard for the distribution of audio-visual content. These "windows" are increasingly having a substantial economic impact on tourism, as a growing number of visitors are choosing their destinations as a result of exposure to images on a variety of audio-visual media. People are reading less and consuming more films, videos and television, resulting in media playing an increasingly vital role in influencing the behaviour of tourists.[7]
- Emergence of the "experience economy" to meet changing tourism demand. There is an increasing tourist demand for experiences, including demand for experiences based on entertainment and escapism, as well as more active and learning holidays.
- Sustainable tourism issues and the increasing demand for ecotourism and eco-friendly tourism destinations.

Screen Tourism: Bringing the Two Sectors Together

As stated above, the EuroScreen project aims to align policies between the screen and tourism industries. The concept of screen tourism relates to tourism induced directly or indirectly by a tourist destination or attraction being viewed on screen, including film, TV, commercials, video game and internet.[8] It attracts consumers of audio visual media who respond to the opportunity to visit a place they have seen on screen (either as a real production location or a fictional setting) and who wish to find more information about it. For these consumers of content, their desire to visit such destinations converts them into tourists, with the content either providing the primary driver for visiting a place or providing something which gives added value to a region or place. The latter may result in the tourist staying longer, but it can also change the image as well as the awareness of a place for the tourist and make destinations more competitive. For some places it might even result in a prolonged destination life cycle as new attractions are added to the place, or it could provide an expansion of the tourist market in the form of new visitor segments. Another effect could be the expansion of the visitor season since screen tourism is not dependent on a specific season.

The study of screen tourism is relatively new in tourism research. One of the key questions is how to define and develop effective cooperation between the screen sector and tourism sector.[9] The EuroScreen project therefore works to develop a framework to assist the participating regions to identify and, where possible, assess the screen sector's economic impact on tourism. Tourism patterns following releases of film and TV productions may be measurable, especially if the location is not already an established tourism destination.

6. *World Tourism Organisation (2012) http://www2.unwto.org/en*
7. *Butler (1990)*
8. *See for instance Beeton (2005) or Hudson and Ritchie (2006b)*
9. *The tourism sector includes industries involved with e.g. Accommodation; Food and restaurant Services; Attractions, Transportation; Activities; Travel Services as well as public sector and government agencies such as regional tourism organisations.*

EuroScreen's mission is to take full advantage of the screen industry as a proven catalyst for tourism development in terms of economic and social regeneration, destination development, job creation, development of tourism products and foundation of new SMEs as will be outlined in this baseline study. The EuroScreen project aims to exchange and transfer good practices between EuroScreen partners and to ultimately improve policies addressing screen tourism across the participating regions.

Aim and Methodology of the Baseline Study

The EuroScreen baseline study has several aims. First, the study is vital in ensuring that partners understand the existing screen tourism activities and policies in all EuroScreen regions. In the first instance we have therefore gathered information about the screen and tourism sectors in the eight partner regions[10], as well as presenting a short analysis of each region. At the end of the chapter, a concluding summary sets the scene and examines the screen tourism challenges faced by the EuroScreen partnership.

Second, the baseline study explores and analyses existing practices and policies to support the development of tourism and screen sectors as well as the current opportunities for SMEs within the screen tourism sector. The second part of the baseline study is a presentation of the collected material, and an analysis based on current research within the field.

The third aim of the EuroScreen baseline study is to identify five good practices amongst the participating regions. The concluding part of the baseline study is a summary and presentation of these good practices, providing a reference point from which to move forward.

The methodology of the study took a qualitative approach. Questionnaires with semi-structured questions were sent to all partners (besides Lund University who carried out the research) in order to gather the partners' experiences (see Appendix 2). The questionnaire was divided into four parts, with respondents providing information as follows: an overview and insight into each participating organisation and their experience of screen tourism activities with a special focus on marketing and co-operation activities; a focus on regional perspectives including examples of interesting or successful campaigns, methods and techniques used by the region to measure screen tourism effects, as well as information on incentives and tourism attractions; wider examples of interesting or successful campaigns within partner countries; and, finally, good examples worldwide.

The questionnaire was answered by partner organisations as well as some relevant external organisations within the partner countries. The questionnaires were also complemented by interviews with different stakeholders identified by the partners (Appendix 3). In the baseline study, the main findings of the survey have been grouped under five themes (see chapter 3): Economics, Management, Destination Marketing, Screen Tourists and Tourist Product Development.

EuroScreen is co-financed by the European Regional Development Fund and made possible by the INTERREG IVC programme. The Interregional Cooperation Programme INTERREG IVC, financed by the European Union's Regional Development Fund, helps regions of Europe work together to share experience and good practice in the areas of innovation, the knowledge economy, the environment and risk prevention.

10. Note: the partnership consists of nine organisations. Two of them, the Municipality of Ystad and Lund University, are situated in the same region. Lund University is not directly involved in regional development and policies and has had a slightly different role as academic experts in the project.

2. EuroScreen Partners and Their Screen Tourism Experiences

The partnership consists of some regions at the forefront of screen tourism (Apulia, London and Ystad), others with some experience (Malaga and Malta) and three less-advanced regions (Bucharest, Maribor and Rzeszow).

2.1 Film London/UK

Film London, as the UK capital's film and media agency, works to ensure that London has a thriving film sector that enriches the city's businesses and its people. The agency works with all the screen industries to sustain, promote and develop London as a major international production and film cultural capital, as well as supporting the development of the city's new and emerging film-making talent. Film London is funded by the Mayor of London and the National Lottery through the BFI, also receiving significant support from Arts Council England, UKTI and Creative Skillset. As the Mayor of London's designated film agency, Film London works closely with the Mayor's Office, with a specific remit to strengthen London's position as a film-friendly region to attract investment and to promote the economic and cultural importance of film, TV, commercials and other audio visual content in the capital.

Each year London hosts over 18,000 filming days with Film London assisting in excess of 2,000 enquiries from feature film, TV, commercial and short film projects requiring production and location support. Film London is also a member of the Mayor of London's Cultural Strategy Group providing advice on the promotion of London as a world class city of culture and has therefore been directly involved in policy-making and strategy at London regional level.

To date, Film London has not had a budget to directly invest into the marketing and promotion of film and TV for tourism purposes. It has therefore created projects on a micro budget or without any budget at all, focusing mainly on a UK market due to a lack of resources for promoting to tourist markets internationally or to targeting particular territories. Where international reach has been achieved it has been either through press and media coverage or through partnership with London's promotional agency London & Partners (previously tourism body Visit London). Whilst there is huge potential for further long term strategic work with London & Partners, such projects have so far been limited, running on an ad hoc basis as a result of different priorities between the organisations.

2.2 Apulia Film Commission (AFC)/Italy

AFC, situated in south-east Italy, is the Apulia Regional Development Agency´s vehicle for policy development for the screen sector. AFC plays a central role in the local audio visual sector. In the last five years more than 100 production companies have chosen Apulia as a film location, producing both direct and indirect impacts by promoting Apulia and raising its image. However, to date no major Hollywood productions have been attracted to the region. The launch of an international film fund in 2012 may attract further productions from outside Italy and consequently give a higher exposure of Apulia across the globe. An interesting opportunity relating to this is an increased interest in Bollywood filming in the region which could provide excellent tourism potential for new markets.

AFC projects facilitate screen tourism through location scouting, promotional campaigns at major film festivals, meetings with stakeholders from both screen and tourism sectors, and promotional activities viaCineporti (two cinema-oriented business centres dedicated to productions, directors and artists). All strategies in the film tourism sector (like *Apulia Experience*) are planned and shared with the regional authority. An important initiative which combines film strategy and tourism development is the *Apulia Film Tourism Guide* for the whole region, which was first published in 2009 and then in 2012.

The region clearly has a tourism infrastructure in place, but is competing with established Italian tourism destinations. A challenge is to turn screen locations into tourism destinations and to further develop screen products to exploit for tourism purposes. There is a track record of developing film tourism products such as the film guide and a film location app to further build upon.

2.3 Bucharest-Ilfov Regional Development Agency (ADR-BI)/ Romania

ADR-BI is an intermediate body for the implementation of the Regional Operational Programme for Regional Development in the Bucharest-Ilfov region. The region has experience in attracting international film production to the capital city and has an established film industry. Often film productions use studios (such as well-known Castel Film Studios) or use Romanian locations to stand in for other locations. Bucharest is then not identified as the destination, which can be a problem when it comes to developing screen tourism. Tourism development has recently shifted into focus and the region does not have any experience of screen tourism or screen tourism products.

Over the last ten years, more than one hundred studio-based international productions (especially feature films and commercials) have been shot in the region. These productions have generated important inward investment, but the region doesn't have any clear strategy for how to use this opportunity to attract further tourism and develop the sector. A further challenge is the lack of an established film commission in Romania for the tourism sector to engage with. A number of high profile films have been shot in Romania, for example *Cold Mountain*, and there is a great opportunity to explore tourism potential of films such as this one. There is also already existing screen tourism (Dracula) in the country, which can be seen as a competitive advantage, although it should be considered whether this fits with the image Romania wishes to promote.

2.4 Fondazzjoni Temi Zammit (FTZ)/Malta

FTZ is a Maltese not-for-profit foundation which operates in the field of skills development relating to tourism and audio visual sectors, science and technology issues and research activities. In recent years, Malta´s involvement in the screen industry has seen an unprecedented level of incoming and varied productions. According to the Minister of Finance, "this steady influx of productions would contribute considerable added value to the economy".[11] FTZ´s collaborative nature serves as a strategic partnership with the involvement of a number of ministries, local authorities and national agencies.

Malta has a strong film commission, international screen experience and has had a large number of international screen productions. A challenge for Malta is to turn screen products and activities into tourism products. Malta has a well-developed tourism infrastructure in place and an international tourism market. However, locations in Malta are frequently used to stand in for other locations; Malta is therefore not necessarily recognised as a destination on screen. To alter this there is a policy instrument which means increased tax incentives for feature films portraying Malta as Malta on screen, as well as other incentives for attracting film productions. An interesting opportunity is presented by the strong clusters in the creative sector, which provide a potential for connecting the film and tourism sector through business incubators.

2.5 Maribor Development Agency (MDA)/Slovenia

MDA, in North-East Slovenia, is responsible for the co-ordination of regional development activities in the Podravje region. Beside the preparation of a regional development plan and annual action programmes, MDA is involved in activities concerning the development of regional SMEs, tourism and innovation development strategies, development of tourism products, innovative pilot projects and cluster-supporting activities.

The film industry however is not developed in the region; there are limited screen production examples and no screen tourism experience. In 2012, Maribor was European Capital of Culture, which brought attention to the city across Europe and gave Maribor some positive media coverage. Similar media coverage is provided by the annual world cup "Golden Fox" ski competition races which take place at the Pohorje Mountain. Also, Maribor has had documentaries shot in the city region. There is an opportunity to build on this, as well as on Bollywood film production that has come to Slovenia for the first time in 2012 targeting new tourism markets.

2.6 Malaga Regional Development Agency (Promalaga)/Spain

Promalaga is a public company, 100% owned by the municipality of Malaga in the South of Spain. Promalaga has strong expertise of both tourism and film sectors. As a development agency, it also works closely with screen producers, the Malaga Film Commission, Malaga Convention Bureau and the Malaga Tourism Board. Promalaga delivers the annual Malaga Spanish Film Festival as well as the International Week of Fantastic Films, hosted at University of Malaga. Promalaga is currently delivering a wide range of economic regeneration projects in the city, including the development of a network of incubator spaces across the city. One of the incubators is targeting the creative tourism sector, which plays a central role for the city. Promalaga is fostering the development of business start-ups and growth of businesses to emphasise the potential commercial opportunities between the tourism industry and the creative sector in which the screen sector plays a key role.

Film productions have settled in the city region, and the region has an experienced audio visual service sector which has grown as a result of the increasing number of commercial productions in the area. Focus so far is on the advertising sector shooting on location, and there is a lack of international high-profile features. The city region also has limited exposure, which could make it difficult to fully take advantage of its screen tourism potential.

The tourism industry is the main economic sector in the city as well as in the region, which means that the tourism infrastructure is already in place. A challenge is that the destination image is not linked to screen products for tourists. An advantage is that there are already some good national examples of screen tourism. The region also has a good, innovative screen tourism case in the Smurf village, which we will come back to in chapter 3.

11. Times of Malta (2012) http://www.timesofmalta.com/articles/view/20100721/local/unprecedented-growth-for-maltas-film-industry.318866

2.7 Rzeszow Regional Development Agency (RARR S.A.)/ Podkarpackie Region Poland

RARR S.A. in South-East Poland supports the development of the Podkarpackie (Sub-Carpathian) province, and is responsible for economic development policy and implementation. They work closely with tourism organisations, and development and strategies connected with tourism are identified as a central priority.

RARR S.A. has a strong track record in tourism development policy and in developing actions to raise the sector's profile but it has limited experience in the field of audio visual production and the overall screen industry. Currently, there is no screen strategy to support the sector's development in the region and nobody is actively attracting productions to shoot in the region. However, the region has several potential film locations in the Podkarpackie area. There is also strong potential demonstrated by film commissions in Krakow and other Polish regions, which show the benefits of attracting productions to the country. Good national examples of screen tourism are available as benchmarking and there is an opportunity to learn from neighbouring film-friendly regions and potentially work with them.

2.8 Ystad Municipality/Sweden

The Municipality of Ystad is a small local public authority situated in the very south of Sweden. Ystad City Council has been developing activities that link film and tourism for several years. The council works closely with the film commission, the university and the local banking sector, as well as co-operating with Visit Sweden and the regional Skåne Tourism Board. It has a significant experience of policy development to support the screen tourism sector. After the success of the fictional character Kurt Wallander (crime books, TV and film), several related activities have been carried out. Among others, the following initiatives are supported by the council: a film museum that provides an interactive experience, several hotel packages, restaurants and coffee bars, walking and bus tours, an iPhone app called "In the footsteps of Wallander" and the annual international conference "Mixed Reality".

Film production, together with related activities and the professionalisation of events have had a successful impact on the tourism sector by attracting more visitors to the city. From 2004 to 2008 the financial turnover from tourism increased by 60% mainly due to the first of three English-language *Wallander* films, which were shot in the city in 2004. A challenge for Ystad is the dependence on the *Wallander* series, and relating to this, problems of exploiting further film tourism products based on the *Wallander* series due to IP restrictions of using the name "Wallander".

Another challenge for the municipality is the lack of a wider regional strategy. At the moment the regional tourism board has shown interest in linking up with film and to learn about Ystad's experience with Wallander, which could be seen as a step forward and a great opportunity.

2.9 Summary: Setting the Scene of the EuroScreen Partnership

As seen in the section above, the partnership gives us a broad and diverse picture. There are clearly regions at the forefront such as Apulia, London, Ystad and to some degree Malaga and Malta but also regions without any experience of screen tourism such as Bucharest, Maribor and Rzeszow.

Some of the regions have extensive experience and knowledge of the screen sector, but limited knowledge or experience of screen tourism and screen tourism sector development (London and Bucharest). Two of the regions (Rzeszow and Maribor) have little knowledge of the screen sector but good knowledge of tourism. There is furthermore great potential to develop screen tourism in some regions, which already have existing tourism and a tourism infrastructure in place (such as Malaga and Malta).

Moreover, the analysis of the regions demonstrates the importance of having tourism products as well as screen products which can be developed for screen tourism and become tourism attractions. Another challenge is how to develop screen tourism when destinations are mostly used to stand in for other locations (like Bucharest and Malta).

An interesting opportunity is presented by the strong clusters in the creative sector, seen in Malaga and also Malta, which provide a potential for connecting the film and tourism sectors through business incubators.

Challenges for most of the regions are how to best develop regional screen tourism strategies which incorporate both sectors. The best example of this among the partnership seems to be Apulia which will be discussed further in chapter 3.

Among the partnership there is also an experience of lack of local authority buy-in; a lack of understanding of the positive benefits of the screen sector and the opportunity to link in with the tourism sector. As the potential is not fully understood, there is a risk of missed opportunities for destinations to strengthen their development and competitiveness. Even places currently at the forefront of screen tourism and with a strong understanding of the positive effects of film and tourism like Sweden's Ystad, could be challenged by a "good-enough" attitude among the policy-makers, happy with what they have already achieved, resulting in a potential loss of competitiveness.

We have now set the scene of the EuroScreen partnership and will now move on to the second part of the baseline study, which is a presentation of the collected material, and an analysis based on current research within the field.

3. Screen Tourism Overview

The aim of this chapter is to give an overview and analysis of the existing research literature and themes covering screen tourism. The research findings are exemplified and complemented by other case studies, statistics and examples provided by the project regions. The chapter is divided into five sub-sections: economics (including different forms of benefits); management (including policies, strategies and partnerships); destination marketing (including branding, campaigns and placement value); screen tourists (including drivers, activities and statistics); and tourist product development (including tourism products and attractions), which each present different screen tourism perspectives. Each sub-section has a concluding section at the end where the major findings are presented.

3.1 Economics

This section will look at the economic benefits which could be achieved through a screen production (film, TV or commercial) taking place in a destination, both in a short term as well as in a long term perspective. It will address what a destination can gain in investing in and attracting film and TV productions to its area. The section starts with a general background about the economic benefits of screen productions and then moves on to different examples to illustrate the actual economic impacts in numbers.

Economic Benefits of Screen Productions

In recent years there has been a growing interest in attracting film productions to specific places, regions and countries. Film commissions have existed for many years, but the growing interest has resulted in a substantial increase in the number of film commissions. Film commissions exist on national as well as on regional levels and there are also an important number of city film commissions. There are roughly 300 film commission globally who are members of the Association of Film Commissioners International (AFCI).[12] However, it is estimated that twice as many exist, since not all film commissions are members of this organisation.[13] The numbers of film production hubs are growing and they all aim at attracting film production to their specific region. In a European context there are 82 film commissions from 25 different countries as members of the European Network of Film Commissions (EUFCN).[14] The number of film commissions has grown rapidly in the last two decades. For example in the late 1990s there were three film commissions in Italy and since then another 27 have emerged.[15] The revenue generated by film productions for the region, together with its beneficial impact on employment and the local economy, has been demonstrated by extensive research and studies.[16] The growing interest is due to film being seen as a fast-growing creative industry that will generate revenue to the local economies.[17]

Film commissions used to have a production specific focus, mainly trying to attract film productions and neglecting the effect a film production could have on a region in a more touristic context.[18] However, that has now changed and besides a focus on impact on jobs created, growth in local tax revenue, new business activities and expenditure along the way, screen tourism is seen as having a long term economic benefit.[19] Screen products such as film, documentaries and TV series are seen as triggers that could alter or develop a new image of a region which could lead to growth in tourism.[20] Another benefit of screen products being made in a region is the free exposure the region gets without having to pay for the promotion. This material is perceived as highly trustworthy by the viewers since it is not seen as marketing or direct advertising that is trying to sell the region.[21]

In order to attract film productions, film commissions offer different services and activities to make a city or region film-friendly and provide incentives which can also be financial. This includes services to assist with the facilitation of filming, providing locations advice, establishing partnerships with filming locations to ensure a smooth filming process and assisting in finding film crew friendly accommodation.[22] This means that a range of authorities, organisations and local businesses co-operate to facilitate filming for film crews in the region which is vital for a smooth production.[23] Increased usage of hotel accommodation and catering has therefore seen positive direct economic impact of a film and TV production.

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12. The Association of Film Commissioners International (2013) http://www.afci.org/about-afci/history
13. Interview with Mikael Svensson (2013) Film Commissioner Oresund Film Commission
14. Becheri and Maggiore (2013)
15. Ibid
16. See for instance Oxford Economics (2012) or Cucco and Richeri (2011)
17. There has been a 56% growth and innovation in the audiovisual industry between 2000 and 2010: Creative Media Europe – Audiovisual content and online growth (2012) http://www.acte.be/EPUB/easnet.dll/GetDoc?APPL=1&DAT_IM=02B79F
18. Hudson (2011)
19. Cynthia and Beeton (2009)
20. See further chapter 3.4
21. Beeton (2005); Falkheimer and Thelander (2007)
22. For example Highlands of Scotland Film Commission
23. In the case of facilitating filming in the UK capital, Film London produced a code of practice, through extensive industry consultation with the London Filming Partnership. The code of practice is a comprehensive and practical tool to help with filming in public places in London.

Being viewed as a film-friendly destination is crucial for attracting productions and regions have to compete with each other. As a result, there are different financial incentives that have been developed in different regions to attract film companies. These include tax credits or film funds available to companies shooting in the respective region or country as well as dedicated production funds. Examples of these incentives will be addressed in chapter 3.2.

What is the actual economic impact in numbers? Below we have listed some good examples to illustrate this:

- An example at national level is the UK, where the film industry has a total economic impact of contributing over £4.6 billion (approx. €5.4 billion) to UK GDP and over £1.3 billion (approx. €1,5 billion) to the Exchequer (gross of tax relief and other fiscal support) in 2011. It also created the equivalent of 117,400 full time jobs in the UK while tourism generated by films depicting the UK was estimated to have contributed about £1bn to UK GDP.[24]

- A more local example is shown in a report of the economic impact of the *Millennium Trilogy* in Stockholm. It was estimated that every invested Swedish krona in the project had a return of 1.5, that is for every 100 SEK (approx. €11.5) spent, 150 SEK (approx. €17,3) were returned.[25]

- A regional example is provided by Apulia Film Commission (AFC). When AFC, through their film fund, invests in a film production in the Apulia region it comes with certain conditions. The AFC supports and co-ordinates all links in the film and audiovisual production chain with four funding programmes (Apulia National Film Fund, Apulia International Film Fund, Apulia Development Film Fund and Hospitality Fund) and a variety of free services which provide immediate solutions to logistical problems such as scouting in the region, reductions in the costs of using public areas, studios for casting and office space. The economic impact 2007-2010, which measured the ratio between regional fund allocation and direct expenditure, showed that for every €1 provided through funding, production companies spent more than €6 in the local area. TV-series had a higher level of spend due to the time spent in the region and of course higher budgets resulted in a higher spend in the region. As previously mentioned, accommodation is important and 22% of spending was attributed to this area. Other areas were costs for Apulian crew, transportation as well as insurance, consultancy, permits, hire fees.[26]

- Ystad Municipality, has calculated that on the first *Wallander* series the investment was 13 million SEK (approx. €1.5 million) with a return to the region of 50 million SEK (approx. €5.8 million). Two *Wallander* productions with the BBC had an investment of 15 million SEK (approx. €1.7 million) with a return of a total of 46 million SEK (approx. €5.3 million). Finally *Wallander* 2 had an investment of 15 million SEK (approx. €1.7 million) and had a return to the whole region of 50 million SEK (approx. €5.8 million).[27] Thus, the investment in film projects has increased levels of spend in the Ystad region. Just like in Apulia, employment is a figure that is emphasized when it comes to economic impact. In the case of Ystad, the second *Wallander* series provided 298 employment opportunities of which 193 came from the region. The BBC project provided 144 employment opportunities with almost half of them of a regional background. Local companies which have benefited from the film productions include car rentals, food stores, security and cleaning companies, hotels and restaurants. These were all direct economic impacts of the productions. However, it could be concluded that the productions, most likely, had an indirect impact on tourism too. The turnover in the tourism sector in Ystad went from 490 million SEK (approx. €56 million) in 2002 to 720 million SEK (approx. €82.9) in 2011.[28] It cannot be assumed but it is highly likely that there is a correlation between the exposure of Ystad in various screen products during this period and the growth in tourism turnover of 60%. It shows in the growing number of employees in the tourism sector that the economic turnover has increased because it has gone from 388 full time employees to 560 in 2011. The statistics also show an influx of day visitors and hotel bookings over the same period. Thus, in addition to having a direct economic impact, film productions also have a wider and more indirect impact.

All of these examples are European, but the economic tourism impact is also seen elsewhere. In the Gold Coast in Australia film productions are almost seen as a specialized tourism segment: the long stay business tourists. They come and stay and use facilities such as accommodation and restaurants.[29] Film productions are in this sense already creating tourism while filming and screen tourism is just another phase of the tourism triggered by film and other screen products.

Productions also generate tourism during filming, with high profile film productions functioning like mega-events[30] and therefore attracting visitors.[31] This was clearly the case when the Bollywood film *Don 2* with the

24. Oxford Economics (2012)
25. Millennium report (2011)
26. Internal material submitted by the partner Apulia Film Commission, Italy
27. Rundqvist, Petra (2010) PPT Presentation
28. Ystad Kommun (2012) TEM report
29. Ward and O'Regan (2009)
30. The definition of a mega-event is large-scale cultural (including commercial and sporting) events which have a dramatic character, mass popular appeal and international significance.
31. Ward and O'Regan (2009)

famous Indian actor Shah Rukh Khan was filmed in Berlin, Germany. This film was funded with €2 million, most of which came from the German Federal Film Fund and the Berlin-Brandenburg Media Board. As with other cases, most of the crew was German, some of the actors and almost all of the crew.[32] When the film was shown in India it was preceded by a one-minute advert for Berlin as a tourism destination. The advert and the whole project of attracting the film production to Berlin and Germany was a partnership between the Berlin Film Commission and Berlin tourism organisation and the latter organisation paid for the commercial.[33] Thus, the aim was to attract Indian tourists to Germany and Berlin.[34] Tourism can therefore have a long term economic impact on a destination based on previous film productions taking place. In this particular case the tourism had already started during filming because fans that follow Shah Rukh Khan started to travel to Berlin when the film was shooting.[35]

As seen above, a screen product can have a direct tourism impact as early as during filming (even if film productions normally try to avoid publicity during filming). In the next section screen tourism is further addressed as a secondary economic benefit.

Secondary Economic Benefits of Screen Productions: Tourism

As already introduced in the previous section screen productions have a short term economic impact as well as a much longer economic impact. This is achieved through screen products' potential as drivers for the tourism sector. Screen products are often recognised as having a short term impact; however it is argued by researchers such as Sue Beeton that screen tourism is like a pilgrimage (see further chapter 3.4). Thus, as with a pilgrimage, visits might not take place immediately after viewing a screen product and could instead be years afterwards.[36]

Even if the effect is not always instant, the potential value through tourism of a film production is a highly relevant issue for film commissions to address.[37] However, many organisations are reluctant to get involved due to a lack of financial resources for both film commissions and tourism destination marketing organisations. As there is a lack of raw data relating to investments and expenditures in this area, it is difficult to measure the return on investment which in turn makes it difficult to attract investors.[38][39] One of the main reasons for this is the varying lengths of time elapsing between tourists having seen a screen product and their visit, mentioned above, making it difficult to directly attribute the visit. Another reason is the problem of singling out screen tourists from other tourists and identifying their specific contribution to the local economy. Since there are no specific points of entry it is always difficult to measure the number of tourists visiting cities and towns, as opposed to gated properties for example, and this applies to screen tourists too. There is therefore a need for a good measurement tool in order to make screen products a significant contributor as a generator of a tourism destination.[40]

The Oxford Economics Report, published in the UK in 2012, estimated that films depicting the UK are responsible for generating around a tenth of overseas tourism revenues, contributing around £1 billion (approx. €1.2 billion) to UK GDP and £230 million (approx. €269 million) to the Exchequer in 2011. Further, it is estimated that one in ten of the foreign visitors to the UK probably come as a result of seeing the country depicted in film and as a result this generates £2.1 billion GBP (approx. €2.5 billion) in additional visitor spend.[41]

The Scottish Tourism Authority, Visit Scotland, commissioned research in 2012 to assess the influence of productions on audiences' decision to visit a destination seen on screen. The research shows that 43% of respondents agree that film had inspired them in some way to visit a destination and 19% responded that film had a direct link to their visit. Moreover, 24% answered that it inspired them to find out more about what was depicted on screen.[42] The respondents in this material were all from the UK which might have an impact on the results especially if they are day visitors (see further chapter 3.5). However, it is acknowledged that screen products have a high impact on the tourism sector. It is argued that films can increase visitor numbers and support investment in refurbishments and expansion at specific attractions.[43] However, there is no substantial quantifying data that can support this argument, as already addressed in the previous section with the case of Ystad. The screen tourism effect can be measured on a single attraction but not on a whole destination. This is due to a lack of instruments to measure the effects in a consistent way. At present the arguments are instead grounded in case studies from all over the world.

32. Spiegel Online International (2010) http://www.spiegel.de/international/zeitgeist/bollywood-dreams-can-shah-rukh-khan-make-berlin-sexy-for-indians-a-729807.html
33. Interview with Christiane Raab (2012) Film Commissioner Berlin Brandenburg Film Commission
34. Spiegel Online International (2010) http://www.spiegel.de/international/zeitgeist/bollywood-dreams-can-shah-rukh-khan-make-berlin-sexy-for-indians-a-729807.html
35. Interview with Christiane Raab (2012)
36. Beeton (2005)
37. Lundström (2010)
38. Connell and Meyer (2009)
39. Hudson (2011)
40. Connell and Meyer (2009)
41. Oxford Economics (2012)
42. Visit Scotland (2012) UK Consumer Attitudes, Film Related Topic
43. Ibid

There are several different cases that can illustrate this effect on single locations. The film *Robin Hood* for example created a growth in tourism for the regions depicted in the film after its release in 2010. Nottingham Castle had 5.5% more visitors and Sherwood Forest had 7% more international visitors in 2010 compared to the year before.[44] In Stockholm, Sweden, the *Millennium Trilogy* attracted a significant number of French visitors. Although it is not possible to know for sure that there is a connection, the accommodation statistics for Stockholm in 2008 showed that French visits had gone up by 20% compared to the year before.[45] It is reasonable to see a correlation; however there is no clear data. Another example comes from one of the National Trust's properties.[46] Antony House saw visitor numbers quadruple from nearly 25,000 to nearly 90,000 in the summer of 2010 after appearing in the film version of *Alice in Wonderland*. 50% of the visitors said that they were visiting because of the fact that Antony House was used as a location for *Alice in Wonderland*, and 50% said that they had children accompanying them who were interested in the connection to the film. [47] [48]

Thus, the exposure of a location or destination in a screen production generated an interest for people to visit it. A further example is the case of the novel, and later the film, *Captain Corelli´s Mandolin* and the effect it had on tourism on the island of Cephalonia. A growth in tourism is demonstrated when comparing arrival figures before and after the release of the book and the film and it is again estimated that they are related.[49]

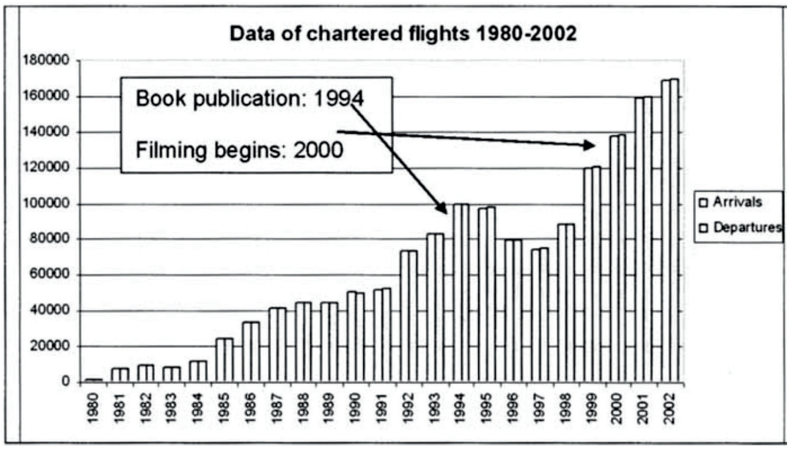

Figure 1: Visitor arrivals to Cephalonia, from O'Neill et al., 2005, p. 215.

A national example from outside of the EU shows some interesting tourism growth figures. The popular Korean Hallyu dramas[50] most likely created growth in tourism from markets where the dramas have been shown. There has for example been a 32% growth, compared to the previous year, in tourism to Korea from China, Hong Kong, Japan, Taiwan, Singapore and Thailand. These are the same countries where the products are very popular. In countries that did not show Hallyu dramas, the tourism arrival growth is limited to 9%.[51] Another example comes from the UK. The British TV series *Heartbeat* has had an impact on Goathland, the village in the north of Yorkshire where it is shot. Before the TV production there were 200,000 tourists per year. Today, 1.5 million tourists come to the village as a result of increased exposure in the TV series. This growth in visits has created more jobs in the local tourism sector, new hotels, products sales as well as an extended season. Thus, screen products can have a major impact on marginalised rural areas.[52]

Summary: Economics

- The revenue generated by film and TV productions for the region, its beneficial impact on employment and the local economy has been demonstrated by extensive research and studies. The growing interest in attracting film and TV productions to different places is due to film and TV being recognized as a growing creative industry that will generate revenue for the local economy.
- Besides a focus on impact on jobs created, growth in local tax revenue, new business activities and expenditure along the way, screen tourism is seen as having a long term economic benefit.
- Direct visible economic impacts of film and TV productions benefit local companies; for example car rentals, food stores, security and cleaning companies, hotels and restaurants. However, based on the

44. Visit Britain (2010) Robin Hood, Global Evaluation Report
45. Visit Sweden (2009) Annual Report
46. National Trust is a UK conservation charity, protecting historic places and green spaces, and opening them up for ever, for everyone.
47. National Trust (2012) PPT Presentation by Harvey Edgington
48. Note, though, that there was a lot of work done around this, among others: an article in National Trust magazine with Johnny Depp on the cover and quotes from Tim Burton, press Junket for DVD release at house, DVD extras, website, themed garden for 2010.
49. O'Neill, Butts, and Busby (2005)
50. Hallyu dramas are popular Korean TV dramas like for instance Winter Sonata.
51. Kim, Long, and Robinson (2009)
52. O'Connor (2010); O'Connor, Flanagan, and Gilbert (2010)

findings above it can be concluded that film productions, have an indirect impact on tourism too.

- As seen above, there are many global cases that can illustrate a growth in tourism after a production has been released. However, the actual correlation and the economic impacts are difficult to measure.
- One problem is the time line; it is not always the case that the visit takes place directly after the release of a screen product. Audio-visual products can have an impact on the image of the destination, creating a motivation to visit a place in the future rather than immediately afterwards.
- It is easy to measure the impact at a single attraction such as a castle, chapel, museum or guided tour where tickets are issued and visits are measured. This also applies to more rural location such as Goathland in the UK and other small settlements or sparsely populated areas where it is possible to measure the screen product's impact on tourism as well as any other area with clearly demarcated boundaries.[53]
- In the case of cities and larger areas the measurement of the impact of a screen product is much more complex as tourists come to large cities for numerous reasons which makes it difficult to distinguish them amongst everybody else, and to measure the number of additional visits created specifically through film and TV.
- There is therefore a need for an impact measurement tool that can work for larger places just as well as for rural locations. To date no such tool has been developed to measure the economic impact of screen tourism, though an attempt has been developed to measure visitor numbers by looking at the impact of screen products.[54]

3.2 Management

This chapter addresses different management aspects relating to the development of screen tourism. First, it will discuss various incentives for attracting screen productions to a region, including both tax reliefs and film funds. This is highlighted as it is important for screen products to be linked to a location in order to develop any related tourism. This is followed by a discussion of different strategies that are in play in order to encourage the development of screen tourism. Finally, the importance of different partnerships is highlighted.

To successfully develop screen tourism the following five factors need to be taken into consideration according to Hudson and Ritchie:[55]

- Destination marketing: this is the marketing activity conducted before, during and after the release of a screen product (addressed in 3.3).
- Destination attributes: those are the specific factors associated with the destination such as brand and scenery.
- Film specific factors: e.g. success of the film and identifiable locations (further addressed in chapter 3.3).
- Locations feasibility: for example taxes, labour and resources.
- Film commission and government efforts: tax breaks, lobbying, scouting services etc. (addressed in the next section).

Incentives for Attracting Screen Productions

This first section will address the last factor on the list above, namely government efforts and incentives such as tax reliefs and film funds that are developed for attracting screen productions to a region or city. Productions have a potential to generate screen tourism. The luring of productions is vital because without screen products there is no material to build on when it comes to developing screen tourism. As seen in chapter 3.1 there is a growing number of film commissions, providing national as well as global competition in winning film business - and incentives are important tools in attracting screen productions. These incentives aim to encourage investments, promoting productions, strengthening service infrastructures in the region and creating new jobs.[56] To this list could also be added a growth in tourism. However, from a screen tourism perspective it is important to choose a specific type of production that lends itself to tourism promotion. Primarily, productions that showcase the destination as it is and not as a substitute for another place are particularly valuable in terms of screen tourism (further discussed in chapter 3.3). It is much more complicated and expensive to increase brand awareness when a destination is used as a substitute because research has shown that tourists tend to travel to the destination portrayed on screen.[57] For example, tourists travel to Scotland in the case of *Braveheart*, rather than to Ireland where it was mainly filmed. Interestingly, in the case of the film *Brokeback Mountain*, the location where it was shot actively promoted the destination and invested in a marketing campaign while the destination portrayed on screen received a lot of associated media attention for free.

53. Busby and Klug (2001)
54. See further Young and Young (2008)
55. Hudson and Ritchie (2006b)
56. Hedling (2010)
57. Kim and Richardson (2003); Beeton (2004)

A good example of funding that focused on showcasing the destination in various ways is:

- Malta, which is often used as a good example when it comes to working with incentives. They offer for example an additional 2% credit to producers if the production is going to be valuable for tourism. The MTA (Malta Tourism Authority) offers a cash incentive, as well as a logistical support, to screen productions that portray "Malta as Malta". Certain expenditure of the production costs is covered directly by the Authority to ease the filming activities during principal Imagegraphy. The MTA could also give a contribution towards the following elements of the production which also includes the initial scouting and technical recess: flights to and from Malta; transportation of cargo where there are direct routes served by Air Malta; and hotel accommodation for cast and crew. Productions that are evaluated for these incentives are scrutinised by criteria including the degree to which Malta is featured in the script and whether locations featured are authentic. It is stipulated that 60% needs to be shot locally.[58] Thus, Malta is proactive in trying to secure that Malta is showcased as Malta and not as a substitute for another place.[59]

There are also other forms of incentives that focus on national aspects.

- The UK has a Creative Sector Tax Relief for Film, High-end TV and Animation offering up to 25% relief. To qualify for this tax credit at least 25% of the qualifying expenditure must be spent in the UK and the film must pass a "cultural test" which considers the cultural content, setting, characters, use of cultural practitioners and contribution to cultural diversity. It is the Secretary of State for Culture, Media and Sport that certifies films on the advice of the British Film Institute.[60]

- There are also similar tax reliefs in France, with productions that are French being given a 20% refund of the money spent on production costs in the country. The aim is to support films that show and take place in France and could not be filmed elsewhere.[61]

These three examples all show that subsidies are given to productions that somehow are connected to the country. This forward thinking is beneficial for developing screen tourism.

- In addition to the example above, Malta also has another range of incentives to attract film productions in which the island is used as a substitute for other locations. The Government of Malta offers a number of fiscal and financial incentives for audio visual productions shooting in Malta besides the aforementioned. The incentives are a cash grant given to qualifying productions on the portion of eligible expenditure spent in Malta. Up to 20% of this expenditure could be rebated to a qualifying production company. The rebate to be given as a cash grant on completion of an audio visual production would be calculated on the expenses incurred in Malta: e.g. labour, hotel bed nights, transportation equipment and hire, location fees and catering services. Similar incentives are also given by other film commissions in order to attract film productions.

In addition to tax reliefs or cash rebates there is also another common incentive: film funds. In Europe there is a network of regional film funds called Cine-Regio: the network is constantly growing and at present it represents 41 regional film funds from 12 EU Member States, in addition to Norway and Switzerland.[62] Most film funds are local and here different regions within countries can compete with each other.

- Ystad-Österlen in Sweden for example has a film fund applicable to those productions that shoot at least 50% in Ystad and the neighbouring areas. To qualify for the money, at least twice the amount of money needs to be spent on location. In the contract with the production, rights to material, end-credits and a premiere viewing is secured.[63] Thus, by giving money to the production the local place can secure rights to material and assets that can later be used for marketing purposes.

- Apulia Film Commission has a film fund to: attract direct and indirect investment to the Apulian audiovisual sector; enable professional development for regional artistic and technical staff; provide opportunities for international culture, art and business; publicise Apulian audiovisual culture through comparisons with other productions in the field; encourage contact between local public and private institutions with the best international expertise; and contribute to the promotion and sharing of Apulian cultural identity. The film fund supports either national or international production companies with different amounts of money whether it is a feature film, TV series, documentary, short movie or videogame. However, they have also created a hospitality fund which has a direct impact on the local economy in the tourism sector. The fund is available for both national and international production companies.[64] AFC is also finalizing a location gallery that is a database geo-localized of the most important natural, urban and historical regional locations.

58. *Internal material submitted by the partner FTZ in Malta*
59. *Films and TV-series not showcasing Malta as Malta are e.g. Troy, Gladiator and Game of Thrones.*
60. *Oxford Economics (2012)*
61. *Nielsén (2009) Allt räknas – om rabatter och erbjudanden till filmproduktion i Europa*
62. *http://www.cine-regio.org/about_cine-regio/*
63. *Ystad Österlen film fond (2013) http://www.ystad.se/ystadweb.nsf/wwwpages/5AFC524B4C168D96C12573E5004D8446/$File/Riktlinjer StiftelsenYstad_OsterlenFilmfond.pdf*
64. *Internal material submitted by the partner Apulia Film Commission, Italy*

There are many more examples of film funds available but in terms of screen tourism those subsidies that support productions which showcase the region as itself are the most beneficial for the region when it comes to tourism. The exception to this it is a screen product based on a fictitious place, such as in the case of *The Lord of the Rings* and New Zealand. Incentives as part of an overall development strategy for a region have been discussed in this section, though there are a number of other strategies that a destination can implement as will be discussed in the next section.

Strategies

The following section focuses on the different stakeholders that are needed in order to develop screen tourism and the strategies involved. The key stakeholders for a destination are destination management organisations, the film industry, tourism businesses, the municipality and its inhabitants, tourists[65] and film commissions[66] (as seen in the model in Figure 2).

Figure 2: Screen tourism stakeholders, model by Heitman. With some amendments.[67]

There are many partners that need to collaborate in order to successfully develop a destination. It is therefore vital for each destination to identify who the different stakeholders are within each category. Furthermore, all these stakeholders have different agendas with various priorities and it is important to plan properly in order to develop screen-related tourism and adopt a meaningful strategy.[68] Strategies in the municipality should involve both council officials and people in the town or city. It is important that the residents are involved because their lives can be impacted by the growth of screen tourism, especially when it comes to small destinations.[69] For that reason, it is important to take local citizens into consideration while planning a strategy.

So, how should stakeholders work together? Firstly, there is a need for proactive work, early in the production process, since when the film is ready to have its premiere it is too late to capitalise on the benefits that could be gained from a screen product. Time management is essential and planning should start in advance, ideally when the production decides to shoot in the region or destination. For example, Visit Britain started working on *Skyfall* more than a year in advance of the film's release, planning the marketing activities in conjunction with the opening of the film. In addition to working with the production company Sony Pictures, meetings were arranged with a variety of key partners on the film, including Aston Martin, Coca Cola and Globetrotter.[70]

Second, in the pre-production stage it is important to organise partnerships in order to secure benefits such as end credits and ideally to have input on which locations are chosen for shooting.[71] The closer the contact between the different stakeholders the better are the outcomes for all involved.

One strategy for dealing with the varying agendas of stakeholders is to employ someone who works as a liaison.[72] In Ystad the council employed a film co-ordinator in 2008 to work as a liaison for film related questions and activities. This is part of the town's overall strategy to ensure that film should impact and

65. Heitmann (2010)
66. Di Cesare, Salandra, and Craparotta (2012)
67. Heitmann (2010)
68. Cf Hudson (2011)
69. Beeton (2005)
70. Denitsa Mihova, Partner Marketing Manager, Visit Britain (2012) YouTube clip of a presentation held at a conference organised by Midtjysk Turisme, November 20.
71. Interview with Annamari Thorell (2012) Consultant, KommuniAktion
72. Hudson and Ritchie (2006b)

influence different levels of the town and not only on tourism specific activities.[73] Another example of this kind is New Zealand where they appointed a Minister to oversee the campaigns related to the release of *The Lord of the Rings* trilogy.[74]

Other strategies that should be addressed in the pre-production and production stage is the development of marketing strategies for media coverage and post-production exposure, workforce support, destination images, national promotion and on-going studio relations.[75]

Following this, after or during the release of the film, another set of activities can take place including guided tours and walks, exhibitions and distribution of movie maps (these products and others are further addressed in 3.5). For an extensive list of different activities to apply in the different stages before, during and after release of a film, Filmby Aarhus has developed a toolbox that lists different activities based on the agenda of the different stakeholders.[76]

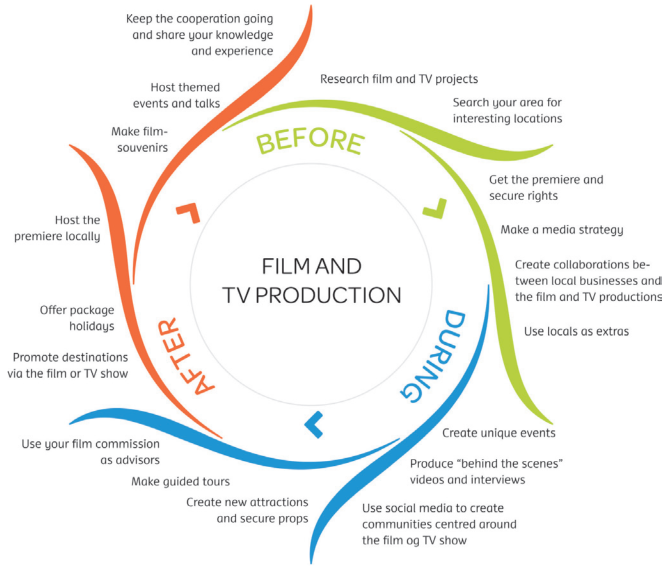

Figure 3: Model by Filmby Aarhus, 2012, p. 7.[77]

There are many strategies that could be adopted in order to develop screen tourism. These strategies are dependent on each destination since they all differ from each other as well as being dependent on which stakeholders are involved. However, a central element is collaboration between different stakeholders and the next section will therefore address the strategies that are applied in a number of strategic collaborations.

Partnerships

Partnerships are essential in order to capitalise on the potential impact of screen products on tourism. However these partnerships are not obvious for all stakeholders. For example, film production companies are primarily concerned with producing and marketing their film and not with the potential tourism the product could generate afterwards. They have in most cases a short term interest when it comes to the destination. Likewise, some tourism organisations are still unfamiliar with focusing on screen products for marketing purposes. A study of the work by destination marketing organisations in Europe revealed that even though 67% had access to screen products in their region only 38% exploited those opportunities.[78] Thus, even if tourist organisations have a screen product not all decide to capitalise on them. The research showed that uncertainty of who should be doing what and a lack of knowledge of the film sector from a tourism perspective had a negative impact on potential partnerships. Other factors that were highlighted in this survey as having a negative impact on the willingness of co-operation were a shortage of time, budget and personnel. For those who actually worked with screen tourism there was substantial difference in budgets allocated for this activity. Though the outcomes of the activities were independent of the size of budget, interest was instead the key factor.[79] The key was an understanding that this was an opportunity worth building on, and that the opportunity should be taken regardless of budget. By demonstrating that one of the reasons for a lack of collaboration was a lack of understanding of the other sector's work, this study shows the importance of the EuroScreen project since one of the key aims is to create knowledge transfers and vital understanding of the screen and tourism sectors.

73. *Internal material submitted by the partner Ystad in Sweden*
74. *Hudson (2011)*
75. *O'Connor (2010)*
76. *Filmby Aarhus (2012) Experience films in real-life - A handbook on film tourism*
77. *Filmby Aarhus (2012) Experience films in real-life - A handbook on film tourism*
78. *Di Cesare et al. (2012)*
79. *Ibid*

- Visit Britain is a leading example of a national destination marketing organisation working in partnership to exploit the link between tourism and films. Each year Visit Britain selects one film for a screen tourism campaign. In addition to working with major studios such as Universal Pictures, Warner Bros and Sony Pictures, Visit Britain collaborates with local screen commissions and international consumer brands to leverage the locations used in films.[80] In the case of the film *Robin Hood* partners included Universal Pictures, Visit England, Experience Nottinghamshire, East Midlands, Nottingham City Council and Nottinghamshire County. The aim for Visit Britain with developing such collaborations is to encourage tourists to visit destinations in the whole country, increasing the number of visitors and thereby the money spent.[81]

These are examples of large-scale partnerships on a national level but there are many local examples too. There is a lot to be gained from partnerships between a small film company and a local tourist organisation. Opportunities for exchange of knowledge and expertise can take place, together with the pooling of resources and support, which can give economic benefits to both parties.[82]

- In the case of the Polish TV series *Father Matthew*, the authorities of the town Sandomierz co-operated with the production company during all stages of the production. The town provided, for example, organisational and logistical support as well as offering to cover the cost of accommodation of the film crew or the cost of aerial Imagegraphs at its own expense. In return the town received permission to use the name of the series for promotional purposes.[83] Even though there was no formal contract the production company negotiated the terms with the city council. Town representatives proposed locations due to their local knowledge of the region and the city which matched the content of the script.[84] They could therefore influence how the town was portrayed, which was beneficial in terms of tourism. Thus, on a local level, communication between different partners can become more productive due to the building of relationships if the production has been filming in the area for some time. Though, this is not always the case since it depends on the partners involved. It can therefore be helpful for a tourist destination organisation, if there is no film commission, to be involved in advising on locations for film shoots and collaborating from an early stage in order to increase the opportunity for locations to develop into tourist attractions.

The first two examples of partnerships were between film companies and tourist organisations. Another stakeholder that co-operates with destination marketing organisations are film commissions. It can be an advantage for these two to pool resources because one is charged with attracting and supporting film productions in the region and the other can capitalise on the results of that work to encourage tourists to visit the locations used by productions. There are mutual benefits because film commissions have knowledge which tourist organisations do not have, relating to the productions filmed in the region and their locations. This knowledge could easily be turned into a tourism asset such as a movie map. Equally there seems to be a lack of understanding of tourist organisations' from a film commission perspective.[85] Despite the potential mutual benefits, it is not always the case that they collaborate.

- Film France found a useful method for collaborating with the national destination marketing organisation. They collaborate on a project basis where they take part in the other organisation's expertise and knowhow.[86] Thus, the film commission approaches the tourist organisation if they need their knowledge and vice versa.

- In Malta, the Malta Tourism Authority (MTA) together with tourism agencies and the Malta Film Commission are working together in order to leverage film tourism in the country which could lead to economic benefits. To date the partnership has primarily had a short term focus, facilitating the work of film productions and concentrating solely on the immediate associated economic impacts. However, an increasing number of film and tourism industry stakeholders in Malta have begun to work together with the primary goal of attracting film productions and then capitalising on the exposure to increase visitors.[87]

- Another strategic partnership is Cine Tirol in Austria which was an initiative by the State of Tirol and the Tirol Tourist Board (Tirol Werbung GmbH) in 1998 for the international promotion of Tirol as the leading film location in the European Alps. In this case the film commission acts as an entity under the Tirol Tourist Board.[88] They have a common goal while working with different tools. In return they collaborate with other organisations such as local tourist offices, cable car companies, bus companies and the different locations in the region while developing tourism products based on films produced in the region.[89]

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80. Denitsa Mihova, Partner Marketing Manager, Visit Britain (2012) Presentation hold at a conference organised by Midtjysk Turisme, November 20.

81. Ibid

82. Cynthia and Beeton (2009)

83. Kucharska (2012)

84. Material submitted by the partner RARR S.A. in Poland

85. Interview with Trish Shorthouse, (2012) Film Commissioner, Highlands of Scotland Film Commission

86. Interview with Patrick Lamassoure (2012) CEO, Film France

87. Internal material submitted by the partner FTZ in Malta

88. Cine Tirol Film Commission guidelines from http://www.cinetirol.com/media/16613/Guidelines09-pg.pdf

89. Questionnaire Cine Tirol Film Commission; http://www.cinetirol.com/en/film-commission/

- In Apulia, the regional departments for tourism, culture and economic development have created a collaborative platform with the most important cultural institutions and Apulia Film Commission. The platform's aim is to set up a creative and cultural district and to increase the synergies, improve the impacts, sharing experiences and developing new models and tools for the creative sector in the area. It is a process that has a strong political commitment.[90] Thus, there are close collaborations between the film commission and the tourism organisation. They have the same overall agenda in a regional collaboration focusing on the creative sector such as film to increase tourism.

- The final example of a partnership is Movie Med which is a collaboration between six different Mediterranean countries: France, Morocco, Egypt, Tunisia, Lebanon and Spain. It is a collaboration that aims to improve the visibility of the six countries by focusing on film tourism both in terms of hosting film production as well as capitalising after the products are finalised. The focus is on the cultural heritage in the Mediterranean region. To date, Movie Med has organised workshops, conferences and discussion forums that aim to link the film and tourism sectors in the regions. Besides increasing the amount of productions filming in the region, the project aims to create a positive impact on the different images as well as developing new tourism products.[91] This is an interesting collaboration because it works across borders just like the EuroScreen project.

Summary: Management

- This section has illustrated how different regions work with incentives such as tax reliefs and film funds in order to attract productions to film in the region. By attracting productions there is a direct economic benefit while filming, which continues afterwards if the screen product can be used to encourage tourism development. It is therefore important from a management perspective to see which policies can be developed both on a national but also on a more local level to exploit these opportunities.

- A challenge from a screen tourism perspective is to attract the kind of productions that can create screen tourism, namely productions where the locations featured represent the location in the story rather than doubling for another destination.

- Examples have been shown of subsidies given for productions that show parts of the real country on screen. This forward thinking is beneficial for developing screen tourism.

- Besides incentives, proactive work is essential in terms of planning a strategy that incorporates all relevant stakeholders. There is work to be done at all stages of the film production: before, during and afterwards. Since all places are different it is important to identify those stakeholders that are relevant for the development of screen tourism in the individual region.

- Finally, a number of partnerships were highlighted which are crucial to the successful development of long lasting and sustainable screen tourism. Partnerships can take place on a regional political level, between tourism destination marketing organisations and film production companies or film commissions. There are many opportunities to capitalise on each stakeholder's strengths, delivering mutual benefits and developing the region. Thus, partnerships are a key aspect from a management point of view.

3.3 Destination Marketing

Strategies to attract people - residents as well as tourists and visitors - to a place are an important part of what is usually called "place marketing". Place marketing consists of different territorial marketing strategies with the ambition to attract residents, visitors and tourists to a place and also businesses and investors. It can be viewed as an umbrella term, covering strategies in different fields and geographical levels. Usually, when it comes to the field of tourism the more narrow term "destination marketing" is used. With regards to content, place (or destination) marketing is about how places are marketed: the selection of place-related attributes and projects to put forward and the marketing strategies used by different organisations.

This chapter discusses destination marketing activities primarily conducted by tourism organisations. The first aspect to be addressed is the selection of which screen product to use for marketing purposes and the impact they have on the overall brand of the destination. This is followed by a discussion addressing the importance of securing rights as well as how to access screen related material for marketing purposes. Finally, the focus is set on different marketing activities conducted by tourism organisations and their placement value.

90. Internal material submitted by the partner Apulia Film Commission, Italy

91. Interview with Richard Bower (2012) CCIMP, Moviemed, France: additional info to read: "Enhancing territorial image through cinema and film - a good practice guide" (2011) from http://www.moviemedgb.ccimp.com/les_etudes

Criteria for Selecting Screen Products to Market

Before starting to plan a marketing campaign it is important to think about which screen product(s) to select for marketing purposes. For a small destination there might only be a few products to choose from, whereas for larger destinations there will be plenty.

A UK study identified what they considered to be the key characteristics in a screen product for it to have the highest tourism impact:[92]

- The product has to have a strong narrative either in story or character.
- The selected screen product ought to have a high visibility which means products with a broad appeal.
- It is best if the screen product has a positive and uplifting tone.
- The product needs to be linked to an already established brand. In this case it should strengthen something already established rather than creating something new.
- The setting should be a historical building or a rural location.
- The place should have a key role for the story or the characters in the screen product.

In research conducted by Hudson and Ritchie the following factors are highlighted as important:[93]

- The success of the film was important.
- Whether the film had identifiable and accessible locations that the tourists could visit.
- It was also beneficial if the film had some iconic features that were clearly associated with the destination. Furthermore, the story should be of relevance to the location.
- The amount of time the destination was exposed on screen for is also a critical factor.
- Moreover, the location ought to have an appealing image that creates an emotional attachment for the viewers.

Some of the factors are overlapping between the two studies; if a screen product contains some of these characteristics it is more likely to have an impact on tourism.

However, there are always exceptions to be found to these characteristics especially when it comes to the point of screen products displaying a positive and uplifting tone. For example, crime stories are highly popular in the Scandinavian countries and places linked to these stories are popular visitor destinations even if the stories are dark and set in urban locations such as the *Millennium Trilogy* set in Stockholm. The reports show the importance of selecting a screen product that has a strong identification to a place through its story or characters as well as already linked to an established brand. The impact of screen products on a destination's brand is discussed in the next section.

Branding of Destinations

In a research project focusing on the work related to film tourism by European tourist destination marketing organisations, 90% of them indicated that they thought that films would increase the awareness of a destination.[94] Screen products are highly interesting in the branding of a destination because they could in the long run lead to an improved brand image amongst potential visitors. The reason for this is that screen products such as film provide a long-term exposure of a destination which is beneficial when it comes to brand development.[95] For example, *The Sound of Music* (1965) is still influencing tourists to visit Salzburg in Austria today and in Scotland tourist travel to the small village of Pennan continues as a result of the 1980s film *Local Hero*. It is therefore important for tourist organisations to get involved as early as possible with the creators or distributors of the screen product in order to fully harness the potential film has for brand development.[96] Different strategies should therefore be developed when it comes to marketing, in order to take advantage of this possibility.

From a tourism perspective, screen products are the most powerful tool amongst non-traditional marketing activities in having an impact on the awareness of a destination. The reason is that these products create new or exciting twists on destinations.[97] That is, a screen product can add another layer to the understanding of a destination with new themes not previously associated with that place. Furthermore, screen products are also considered to be highly trustworthy products when it comes to portraying a destination because they are not seen as marketing products by consumers.[98] What is seen on screen could therefore have a profound impact to the overall brand of a destination because it is seen as giving an accurate picture of a destination. However, it depends on the destination too; if it is a well-known destination a screen product might just slightly alter or strengthen the already existing brand, for example destinations such as New York, London and Paris

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92. *Stately Attraction: How Film and Television Programmes Promote Tourism in the UK (2007) from http://industry.bfi.org.uk/media/pdf/a/6/Final_Stately_Attraction_Report_to_UKFC_and_Partners_20.08.07.pdf*
93. *Hudson and Ritchie (2006a)*
94. *Di Cesare et al. (2012)*
95. *Hudson and Ritchie (2006b)*
96. *Horrigan (2009)*
97. *Set jetting (2007) a report by Mintel Oxygen; Iwashita (2008)*
98. *Falkheimer and Thelander (2007)*

which most people already have a certain understanding of.

Though, if it is a lesser known destination, a single product can have a significant contribution to the brand. For example the novels and subsequent TV series *The No. 1 Ladies' Detective Agency* created an awareness of Botswana, a formerly unknown destination for many people. Tours to Botswana were developed based around this product.[99] Screen products such as film as well as other media products are part of people's everyday lives: they will have a high impact on the perception of the brand of a destination.[100] It is not surprising that 27% of UK citizens stated in a UK study that they were inspired by something read in books or seen on TV or screen when they travelled.[101]

As stated above, it is clear that screen products can raise the profile of a destination. Two important examples are New Zealand with the *The Lord of the Rings* trilogy and Sweden with the *Millennium Trilogy* (books and films), which will be presented below. These will be followed by three smaller cases to show the impact of screen products on the branding of smaller destinations: Ystad in Sweden, Sandomierz in Poland and Júzcar in Spain.

- New Zealand has used screen products persistently to impact on the country's brand with the release of *The Lord of the Rings* trilogy. This is an interesting case because it is a fantasy genre product and it is therefore not linked to a real physical place. Nevertheless Tourism New Zealand successfully branded the destination as "100% Middle Earth, 100% Pure New Zealand".[102] Thus, the destination marketing organisation managed to link the fantasy realm of *The Lord of the Rings* to New Zealand by a consistent marketing approach and spreading of information about where the films were shot. This was also done by the film company. New Zealand received a lot of attention during the release of the trilogy and it is reasonable to presume that this contributed to the growth in tourism over the same period. Between 1999 and 2008 the number of international visitors (both holiday, visiting friends and family, business travellers and others) to New Zealand increased by 52%.[103] The largest increase was until 2004, the year after the final film was released. It was an annual growth rate of 4.8% which was higher than the average global growth rate during the same period. Furthermore, in an international visitor study 6% cited that *The Lord of the Rings* was one of the main reasons for travelling to New Zealand, while 1% said that it was the only reason for coming. Since 2004 an average of 47,000 visitors has been to a film location while visiting New Zealand.[104] It can therefore be concluded that *The Lord of the Rings* trilogy had a profound impact of the brand and awareness of New Zealand as a destination to visit. Tourism New Zealand is now trying to repeat this success with *The Hobbit*.

- The other example comes from Sweden with the *Millennium Trilogy*, which had an impact on the Swedish brand. The Swedish brand used to be associated with more traditional values and now a new image is appearing due to these media products. Sweden had a rather stereotypical image as something located in the far North which did not appeal to all as a destination to visit. The *Millennium Trilogy* created an image of Sweden, mainly Stockholm but also of other rural locations, as a modern and industrial country with a focus on innovation as well as social and cultural aspects of the country.[105] For those who were already familiar with Sweden, the *Millennium Trilogy* could nuance the image they already had, whereas for new markets it created an awareness of the destination.[106] It had an especially strong impact on the French market which could be seen as an emergent segment of tourists for Stockholm. This is clearly shown in the statistics with French tourists' visits to Stockholm going up by 20%.[107] The total guest nights in Stockholm have increased by 6.8% across all nationalities.[108] Thus, it is reasonable to see a link between the interest in visiting Stockholm and Sweden to the Millennium products. It obviously helped that the media products had global reach which created a lot of media attention around the world. It is estimated that up to 100,000 press articles in have been published due to this. The advertising value, if the same space had been bought for PR purposes, is calculated to be worth up to half a billion SEK (approx. €57.9 million).[109]

- In Ystad a study was commissioned to analyse the media publicity where the town was mentioned in 2012. The analysis aimed to provide an overview of the image of how the town was portrayed and described in articles focusing on film, series and film production in editorial web media: this included both Swedish and English speaking articles.[110] 290 articles were found, of which 50% were positive towards Ystad, 5%

99. See further TEMA Resor press release (2006) from http://www.mynewsdesk.com/se/pressroom/fritidsresor/pressrelease/view/nya-botswanaresor-med-tema-alla-vill-resa-med-damernas-detektivbyraa-221386

100. Hjarvard (2008); Månsson (2011b); Månsson (2011a)

101. Set jetting (2007) a report by Mintel Oxygen

102. See further Croy (2004)

103. International visitors, New Zealand series C10 (2009) report from www.tourismresearch.govt.nz/profiles.

104. New Zealand Fast Facts (2013) from http://www.tourismnewzealand.com/sector-marketing/film-tourism/fast-facts/

105. Mediebilden av Sverige efter Stieg Larsson och Millennium (2012) Medieanalysis by Joakim Lind

106. Sweden beyond the Millennium and Stieg Larsson (2012) from http://si.se/wp-content/uploads/2013/02/Sweden_beyond_the_Millennium.pdf

107. Visit Sweden (2009) from partner.visitsweden.com/sv/Startsida/Press/Pressmeddelanden/2009/Millenniumhype-gor-franska-journalister-nyfikna-pa-Stockholm/

108. Millennium report (2011) from www.frsm.se/download/18.1a1b7a5b12f8a8e79f98000157/Millennium_Rapport_20110407.pdf

109. Ibid.

110. The movietown Ystad (2013) A media analysis report were negative and the rest had a balanced view. Many of the positive articles connected Ystad with tourism and film. The most featured topics concerned casts, the author of the Wallander novels, Henning Mankell, the film friendliness, tourism and star of UK produced *Wallander*, Kennneth Branagh. The analysis of these articles shows that Ystad has managed to brand itself as a town associated with film and the related tourism. Furthermore, it also shows the impact that actors and film or TV personalities can have on destination branding. The report found that the articles had an estimated PR value of 96 million SEK (approx. €11.1 million).[111]

- A similar study has been conducted by PRESS-SERVICE Monitoring Mediów on the impact of TV-series for Polish cities.[112] They explored the value of media coverage for a range of Polish cities through a quantitative analysis including publications from 1,100 press items, 5,000 websites and 100 television and radio channels (without TV and radio scheduling) during 2012. The research agency analysed the results of the presence of 11 cities in the context of 12 selected Polish TV-series' titles. The best ranked was Sandomierz, shown in the TV series *Father Matthew (Ojciec Mateusz)*. The name of the city was mentioned nearly 900 times in 2012, and the reach of these issues stood at 550 million people. The economic value for this media presence is estimated to be worth the equivalent of 10.8 million PLN (approx. €2.5 million). The table below shows the interrelationship between the Advertising Value Equivalency (economic value of media coverage), reach (potential individual contacts) and number of issues.

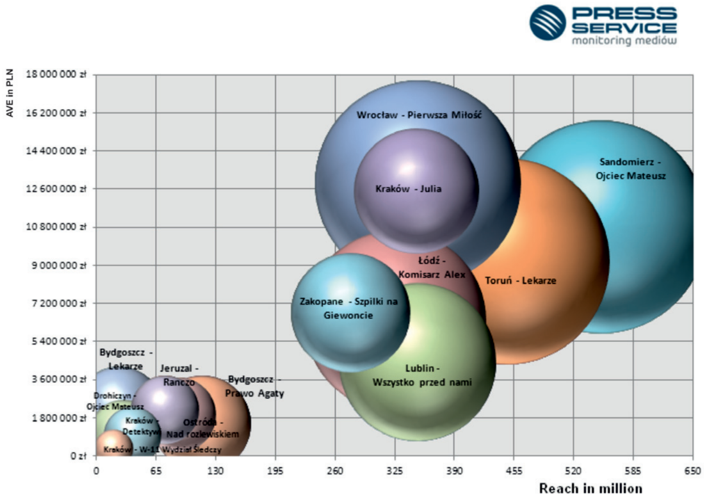

Figure 4: A benchmarking map by PRESS-SERVICE Monitoring Mediów that shows the level of media coverage for each location with regard to three factors: Advertising Value Equivalency, reach and number of issues.[113]

- A different case is the small village of Júzcar in Spain (250 inhabitants) which was contacted by an advertising agency to use the village as a stage to promote the release of the film *The Smurfs*.[114] Besides its picturesque features, the village was selected for its connection with the world of mushrooms, since it holds an annual Mycological Conference. The village agreed to paint all the houses, including the church, blue for the promotion and release of the film. The film company, Sony, offered to paint all of the houses white again after the campaign but a couple of months later the people in the village voted for keeping it blue. The promotion of the film, by painting the village blue, helped to brand the village as the Smurf Village which created a lot of media attention. All marketing was achieved by the promotion of the film and the village invested nothing of its own resources into this. Sony estimated the promotion value between the start of the campaign on June 16, 2011 until the film's release in August 2011 as €800,000. This level of marketing and branding had a direct effect on the village despite the location being used only for promotional purposes rather than for filming. The increase in visitors was instant. The small village received between 1,000 and 3,000 visitors per day. The place was not prepared for this influx in visitor numbers and initially lacked sufficient infrastructure such as restaurants, hotels and activities. A number of new employment opportunities were created due to all these new visitors. The only hotel in the village increased its staff, as did the local pub, the tea house and the gift shop.[115] Thus, for a small village the impact has been tremendous in creating new jobs as well as branding the village and making it a place of interest to visit.

As illustrated in the aforementioned cases above, a screen product can have an impact on the brand of a destination and can reach out to new groups of visitors. In Scotland families with young children suddenly started to visit Tobermory on the Island of Mull. The reason for this was that *Balamory*, a children's TV programme, was filmed in the town. The town was selected for its colourful houses and each character in the

111. Ibid
112. PRESS-SERVICE Monitoring Mediów (2013) W roli głównej – miasto
113. PRESS-SERVICE Monitoring Mediów (2013) W roli głównej – miasto
114. Material submitted by the partner Promalaga, Spain; Questionnaire and interview with Mayor David Fernández conducted by the partner Promalaga, Spain
115. Ibid

program "lived" in one of the houses.[116] Thus, a screen product can create brand awareness or alter an already existing brand. It is therefore important to develop various marketing initiatives in order to take control of the given opportunity: the topic for next section.

Marketing Campaigns and Placement Value

In this section marketing strategies are highlighted in order to show how a tourist organisation can capitalise on the screen product to enhance the awareness of the destination. First a few words on how to access and secure rights to screen content, which is vital for marketing purposes. For those who have formal contracts through various incentives or film funds there is the opportunity to negotiate access to material such as stills, interviews and clips with stars, locations used for filming and Images beforehand.[117] However, it is more complicated if there is no formal agreement. There seems to be a general difficulty in accessing material depending on the production company. It is therefore important to start negotiating clearances at an early stage, establishing an agreement while the production company is still at the destination. When they have left it is far more complicated to secure any rights and there is less incentive for production companies to provide access.[118]

- The first example of a marketing campaign is Visit Britain's work with the film *Sherlock Holmes* in 2009. This was a global marketing campaign run by a national destination marketing organisation in collaboration with a film company, in this case Warner Bros Pictures. Visit Britain is a national promotional tourism agency and the productions they select for marketing purposes therefore need to showcase a range of regions.[119] In this case, Visit Britain collaborated with other partners within the country such as Visit London and Film London. There were several different marketing activities taking place, including an international online media campaign targeting users through social media, travel, lifestyle and entertainment sites, driving online traffic to a *Sherlock Holmes* microsite on Visit Britain's website. The site hosted a competition linking back to regional tourist boards such as Visit London. Hosting a competition is a common tool used by destination marketing organisations. It is a way to create a buzz around the destination. Those who win will have a unique adventure and thereby create a positive word of mouth. The results of the *Sherlock Holmes* campaign showed that the different marketing activities had reached 156 million people in 30 countries.[120] Furthermore, Visit Britain organised 44 press trips which generated 738 articles. Press trips are therefore a useful method to generate press coverage. The placement value[121] of the overall *Sherlock Holmes* campaign was estimated to be over £3.4 million (approx. €3.9 million).[122]

  In terms of film tourism the question is whether it had any impact on potential tourist interest to visit London, which was one of the main destinations of the campaign. Visit London asked a number of visitors if the campaign had had any impact on their decision to travel to the capital. The data showed that the marketing had an impact on the willingness to visit the destination. 38% of respondents had also seen the *Sherlock Holmes* film before visiting but they were in many cases not sure if it had any impact on their interest to visit London.[123] However, people are not always aware of what has triggered their decision to choose a specific destination. Films can have a more subtle impact on a destination's image because tourists create an understanding based on several sources at the same time.

- Another example of a national marketing campaign based on a single screen product comes again from outside of the EU: Tourism Australia's work with the film *Australia*. The film was selected because of its locations, characters, storyline and depictions aligned with the core values of Tourism Australia's destination brand.[124] Tourism Australia therefore decided to work in a partnership with the film company Twentieth Century Fox as well as with the director Baz Luhrmann. The film was seen as an opportunity to showcase to a global audience, experiences that were available in Australia. The themes were adventure, romance, culture and the transformative power of such experiences.[125]

In this partnership Tourism Australia developed 160 supporting and integrated marketing programmes. The tools they worked with were trade marketing, advertising, media relations, affinity partners, digital marketing and advocacy.[126] Many of these activities were similar to activities run by other tourist destination organisations. What differed was that they also decided to produce two advertisements in collaboration with the director Baz Luhrmann in the style of short films that would stand alone separate from the film. The short films captured the

116. Joanne Connell (2005)
117. Cf e.g. Malta
118. Cf Questionnaires from Film London, Ystad and Promalaga; Interview with Annamari Thorell concerning Gotland
119. Visit Britain (2010) Sherlock Holmes, Global Evaluation Report; Denitsa Mihova, Partner Marketing Manager, Visit Britain (2012) YouTube clip of a presentation hold at a conference organised by Midtjysk Turisme, November 20.
120. Visit Britain (2010) Sherlock Holmes, Global Evaluation Report
121. Placement value is the economic value of the media coverage.
122. Visit Britain (2010) Sherlock Holmes, Global Evaluation Report
123. Visit London Sherlock Holmes - Visit Britain Campaign Evaluation (material submitted by the partner Film London)
124. Baker (2011)
125. Tourism Australia (2008) Tourism Australia's destination campaign by Baz Luhrmann
126. Ibid

same themes as in the film. Furthermore, the concept of walkabout[127] was used as something truly Australian. An invitation to "come walkabout" was issued in the commercial by one of the actors from the film *Australia* to the main character in the advertisement and thereby linking the film and the commercial.[128] This intertextuality was an innovative way to create something new in marketing by producing ads in collaboration with the director that were separate from the film but still closely related thematically. Tourism Australia invested around 40 million AUD (approx. €28.5 million) in the ad campaign and around 10 million AUD (approx. €7.1 million) on promotional opportunities around the movie.[129] The aim was to increase the number of international visitors by 3.2% in 2009 and to stop the decline in domestic travelling. Thus, the campaign targeted both international as well as domestic travellers. The results of the campaign were below expectation as there was a general global decline due to economic recession and it did not reach its targets in visitor figures. However, it is estimated that £270 million (approx. €314 million) worth of publicity was generated through theses campaigns, reaching a large global audience.[130] Moreover, Tourism Australia concluded that 22% of those who had taken part in the marketing campaigns were more likely to visit the destination. It should therefore be seen as a long-term prospect and not just in terms of failing to create immediate effects.

The two cases above are both examples of large marketing campaigns run by national destination marketing organisations in order to promote the whole country. Two cases with a more regional approach are highlighted below. These two cases, both Polish, also differ in the sense that the screen products are TV series that target the domestic tourist market. In these two cases the locations play a central role, almost like characters of their own:

- The first case is the city of Lodz where the series *Komisarz Alex* has been shot, since the summer of 2011. Viewers perceive the location almost as one of the main characters of the TV series, an element which has helped to rebrand the city. The city has been known for its industrial heritage and in Poland it has been perceived as an unattractive and sometimes dangerous city.[131] The city is shown as a modern, dynamic and neat city, full of green spaces and flower beds as well as original architecture. Thus, the TV series shows the city in a much more favourable way and it has a positive image.[132] The city becomes interesting to visit, both for tourists but also for the inhabitants to rediscover their own city again. The authorities in Lodz used the TV series for online promotion via official sites, www.lodzfilmcommission.pl and www.uml.lodz.pl, as well as social media including Facebook. Other marketing activities included organising the first episode's ceremonial premiere in Lodz and organising press conferences and press days on the set.[133]

- The other case is the town of Sandomierz where the TV series *Father Matthew* is shot. The first episodes were mainly shot on location in the town but the latter ones showcased more of the region as a whole. The reason for this expansion was the partnership between the regional tourist organisation and the producers of the TV series.[134] The result of this collaboration was the filming of 20 episodes of the series in different locations within the region; the locations were incorporated as a natural element to the story. The TV series was used as a strategic marketing tool to showcase what the region had to offer. To provide visibility of the location so that the viewer could see where it was shot, each episode started with front credits presenting recognisable places within the town as well as the name of the town and the region. The aim was that viewers could connect the region to "the land of *Father Matthew*".[135] In this way the regional tourist organisation had an impact on the places that would be seen in the TV series which helped them to promote the overall region. However, the authorities were aware that more needed to be done to promote the town and the region and different activities were developed.[136] Several marketing activities were undertaken including billboard campaigns, promotional events in shopping centres, press trips, radio adverts and digital campaigns. The town also collaborated in cross promotion, promoting a music album with one of the actors in the TV series in return for the singer promoting the town when he performed with his music. People now connect the town of Sandomierz to the region and they have an increased familiarity.[137] Thus, the TV-series worked as a tool to enhance the awareness and knowledge of the region. The number of tourists visiting the town has increased, with visitor figures demonstrating that the number has doubled between 2006 and 2011.[138] It was during this period that the TV series started to be aired so it is very likely that there is a connection between the increase in tourism and the TV series.

127. The concept of Australian Walkabout refers to someone who returns to the bush for a short period of time to reconnect to the land and the traditional way of life; Baker (2011)

128. Baker (2011); Tourism Australia (2008) Tourism Australia's destination campaign by Baz Luhrmann

129. Tourism Australia (2008) News release "Tourism Australia launches Luhrmann's transformation tourism campaign"

130. Baker (2011)

131. Young and Kaczmarek (1999)

132. Material submitted by the partner RARR S.A. Poland

133. Ibid

134. Kucharska (2012)

135. Kucharska (2012)

136. Material submitted by the partner RARR S.A. Poland

137. Kucharska (2012)

138. See appendix 4

It is important to have a clear strategy for exploiting the full potential of marketing activities. There are additional destination marketing opportunities beyond the filming locations which may include extra information with regards to culture, shopping, local history and food.[139] The screen product can be used as a marketing tool through which to showcase many different aspects of the destination.

Summary: Destination Marketing

In this chapter the following conclusions can be drawn:

- Screen products are increasingly used by tourism destination marketing organisations to market their destination. Screen tourism, with its potential for related marketing campaigns, is a global phenomenon and money is invested in these activities. The aim is to increase the awareness of the destination brand and to convert viewers of films to become future tourists. Screen tourism is seen as a new way to market the destination; it adds a new aspect to the destination which might attract more tourists.

- It is essential to select the right screen product to market if there are several to choose from. Screen products are most effective if they have a strong geographical connection in the narrative or with the characters.

- The destination needs to be easily identifiable by viewers, preferably with some recognisable or iconic locations accessible to visit.

- Marketing through screen products provides the potential to reach out to new tourist segments. For example, Visit Scotland has invested £7 million (approx. €8.1 million) into the promotion of Scotland via the animated Disney and Pixar film *Brave*. The marketing campaign intends to showcase every corner of Scotland through a TV and cinema advert, a new website dedicated to *Brave* as well as through marketing and other events. The aim is to reach out to the family market since it is a family oriented film.[140]

- The investment in marketing activities can be very effective in terms of the placement value of all the publicity given. For example, the *Wallander* films are expected to have given Ystad and the region of Skåne in Sweden a placement value of 2.5 billion SEK (approx. €289 million).[141]

- It is important to have a clear marketing strategy in order to capitalise on the exposure of a destination in a screen product. Viewers need information about where to find the locations in real life and this is where the marketing is required. The destination needs to be packaged and presented in a way which is attractive to tourists and easy to explore.

3.4 Screen Tourists

This section will highlight the tourist perspective, the importance of screen products for tourists' image of destinations as well as tourists' motivation for visiting these destinations. Finally a number of places are highlighted that had an impact in visitor numbers after being exposed in a screen product.

Destination Image

An image is defined as all the impressions that a person has of a destination and it is created by many different sources.[142] In many cases this image is influenced by a range of media products especially if it is the image of a whole country.[143] Media such as film and other screen products are part of people's everyday lives. The impact of these products is expected to be even greater due to the many channels through which it is now possible to access them.[144] However, media's influence on tourism is nothing new and tourists have been inspired by popular culture for hundreds of years starting with paintings and literature.[145] Screen products have now replaced older forms and become a key motivator and source of inspiration. Tourists now select places to visit based on sources such as film, TV, magazines and music.[146] For example, a study of Swedish tourists' image of the Swedish archipelago has shown that it was stimulated by art, Swedish writers such as August Strindberg, film and TV-series as well as by music.[147] That is to say, tourists' image, and thereby interest to visit destinations or attractions, is in many cases associated with some kind of media product.

139. For example Gotland (Interview with Annamari Thorell) and Ystad (Internal material submitted by Ystad)
140. Visit Scotland (2012) Brave from http://www.visitscotland.org/media_centre/visitscotland_disney_partners.aspx and http://forargyll.com/2012/06/brave-scottish-tourism-development-strategy/
141. Cloudberry Communications (2006) Kan man sälja Skåne med "Wallanderfilmer"? from http://www.filmiskane.se/images/stories/filer/wallanderanalys.pdf
142. Jenkins (1999)
143. Iwashita (2006)
144. Hjarvard (2008)
145. Butler (1990)
146. Urry and Larsen (2011)
147. Heldt Cassel (2007)

Screen products are therefore highly relevant when it comes to tourists' perception of a destination and it is important to understand tourists' images of a place since they are a key factor in choosing a destination. If the destination has a positive image it is more likely to be visited. Furthermore, image is also vital when it comes to the actual visit since it determines how the tourist views as well as acts at the destination.[148] A study of Tibet revealed that tourists' image before visiting was primarily influenced by two films, *Kundun and Seven Years in Tibet*.[149] The content of these films was therefore what the tourists expected to see when they visited the country. In this case a limited amount of screen products had a great impact on tourists' image of the destination due to it being a rather unknown destination. This was also the case with the Italian film *Basilicata – Coast to Coast*; it showed a rather unknown region in the south of Italy to a wider audience.[150] Whereas for a destination such as London, the range of screen products is so wide that their impact on tourists' destination image are much more complex.

The results of some research studies, focusing on people's image and perception of a destination before and after seeing a film, revealed that the viewed destination became more appealing and the willingness to visit was increased.[151]

- A study of Japanese tourists' image of the UK showed that popular cultures such as screen products enhanced an already perceived interest for the destination.[152] In terms of influences, 70% of Japanese tourists stated that film and TV were the two most important sources for information about the destination. The two films that were most influential were *Harry Potter and the Philosopher's Stone* and *Notting Hill*, followed by *Shakespeare in Love* and *My Fair Lady*. In TV it was the *Sherlock Holmes* series broadcast 1985-95 that was most influential. The image they had of the UK before visiting was similar to the content of the media products they had watched. Even for those who had visited the UK their images were similar to those with less experience. This shows that the impact of media products on images remained strong even after tourists had experienced and visited the destination. The research concluded that popular cultures such as screen products create an awareness of a destination and make people interested to see it in reality.[153]

Thus, screen products might have a high impact on tourists' image of destinations. Even if films were viewed a long time ago they can still be influential because screen products can create long lasting memories and awareness of places.[154] Film and TV series seen as a child can therefore still have an impact when people are travelling as adults. Moreover, media products are seen as trustworthy by people, showing the real location, and not as a glossy marketing product. The impact of screen products on a destination can generate a new range of visitors if a new product appeals to a new group of people for example families or teenagers.

Screen Tourist Motivations

The section above discussed the importance of image and this section will look further into screen tourists' motivation for travelling to a screen destination and their activities on site. Screen tourists are attracted to any of the following factors in the film: the scenery and setting of the film; the storyline; the characters in the film, an image people want to explore and finally exciting events within the film.[155] It could also be the opportunity to take part in a fantasy world that motivates the screen tourist.[156] Another study emphasised that it is the landscape, actors and attractions within the film that motivate tourists.[157] Macionis listed the following factors in her research on screen tourists' motivations:[158]

- Place: location, scenery, destination attributes.
- Performance: storylines or plot, themes, genres.
- Personality: cast, celebrity, characters.

Some of these elements were also addressed in chapter 3.3, such as place and to some extent performance, but here is also showed the importance of the cast and the celebrity profile of the actors in the films. Furthermore, the theme and genre of a film are also important factors contributing to tourists motivation to visit a destination. Thus, there are different elements that attract tourists to visit a destination, all connected to a screen product. Besides the factors mentioned above that are related to the film itself, elements such as pilgrimage, escape and nostalgia can also be important for the tourist.[159] "Pilgrimage" is to visit a place with an almost religious pretext as the location is seen as something sacred and imbued with special meaning for the tourist. "Escape" is travelling that is connected to escapes from the ordinary chores in life to something extraordinary such as visiting locations seen on screen. "Nostalgia" is related to things that bring memories

148. *Jensen and Waade (2009)*
149. *Mercille (2005)*
150. *Bencivenga, Chiarullo, Colangelo, and Percoco (2012)*
151. *Hudson, Wang, and Gil Sergio (2011); Kim and Richardson (2003); Soliman Mohammad (2011)*
152. *Iwashita (2008)*
153. *Iwashita (2006)*
154. *Riley and van Doren (1992)*
155. *Riley, Baker, and van Doren (1998)*
156. *Carl, Kindon, and Smith (2007)*
157. *Hudson and Ritchie (2006a)*
158. *Macionis (2004, p. 96)*
159. *Riley and van Doren (1992)*

from older times. It could be a visit to a location connected to something viewed as a child.

These are the reasons for visiting movie locations according to Busby and Klug:[160]

- To follow in the footsteps of their favourite actors.
- To position themselves in the location of the film.
- To visit properties purely for their historic significance after seeing a film.
- Visiting locations included in adaptations of literary classics, e.g. *Pride and Prejudice*.
- Overseas tourists are impressed by attractive backdrops and want to visit them.
- Popular TV series have very loyal followers.

Macionis and Sparks on the other hand conducted a survey that identified the following motivational factors as key for screen tourists:[161]

- To see the scenery and landscape in real life.
- To have fun and feel entertained.
- To add something special to the holiday.
- To experience something novel and new.
- To have a unique experience.

Busby and Klug's motivational factors are closely related to the screen products tourists have seen, including the desire to see the scenery or travel in the footsteps of a particular character. Macionis and Sparks on the other hand, besides "seeing the landscape in real", highlighted motivational factors that could be relevant for all kinds of travel and not necessarily screen tourism. Furthermore, Macionis and Sparks' research on tourists' motivational factors for screen tourism showed that 24% indicated that the reason for visiting a film location was because they were on holiday and it was part of their overall holiday experience. Thus, it was not the main reason for going to the destination. However, 15% said that they wanted to travel to where the film was made. Their results showed that only 30% of the respondents had visited a screen location and in this group only 15% had it as a main reason for selecting a destination. If all the respondents are taken as a whole it means that only 4% were pure screen tourists and for the others the screen product was only a secondary motivator. These tourists just happened to be at a destination connected to screen products.

However, other research shows that 8 out of 10 tourists think about planning a holiday based on a screen product and 1 in 5 will actually make that trip.[162] Furthermore, in a survey conducted amongst tourists in Salzburg, 50% stated *The Sound of Music* as a reason for visiting.[163] This research also concluded that the interest to visit the destination grew stronger depending on how many times people had watched the film. However, tourists are not always aware of what has influenced them in travelling to a particular destination. There are many sources that can influence their image and motivate them to travel and it can therefore be difficult to give reasons for the choice of destination.[164] In other cases tourists travel to a country or a region that was inspired by a film but they will not visit a designated screen location.[165] This applied to tourists visiting Rosslyn Chapel in Scotland. In interviews, when asked for media influences when travelling to Scotland, older films such as *Rob Roy* and *Braveheart* were mentioned as influential sources but no locations connected to those products were planned to be visited.[166] However, these influences were not always immediately apparent to tourists and it was only when asked a direct question that they started to think about influential media sources. It is therefore difficult to state, even for tourists themselves, whether or not they are a screen tourist when they have been exposed to multiple media influences and some of them a long time ago. Furthermore, even if they were fully aware of a connection between *The Da Vinci Code* and Rosslyn Chapel, since the interview took place at the premises, it did not mean that they considered themselves to be screen tourists. Screen products as a motivational factor also differ in many cases depending on whether you are a day visitor or travelling for a longer period of time. To give an example, for a day visitor a screen product can be the main reason for visiting an attraction such as Rosslyn Chapel. Whereas for those tourists who travel for a week in Scotland a visit to Rosslyn Chapel may be of a secondary reason, still part of the itinerary but not the main reason for the choice of destination.[167]

160. Busby and Klug (2001)
161. Macionis and Sparks (2009, p. 96)
162. Hudson and Ritchie (2006b)
163. Im and Chon (2008)
164. Roesch (2009)
165. Iwashita (2008)
166. Månsson, unpublished interview material
167. Ibid

Screen Tourist Statistics

It is difficult to measure the impact of a screen product on a destination. The table below (figure 5) shows a range of destinations and the number of visitors before and after a place has featured in a screen product. The figures show the total number of visitors to the destination so these are not all screen tourists. However, the difference between the figures illustrates that it is highly likely that there is a connection between the exposure and the increase in visitor numbers. In some of the cases such as *Alice in the Wonderland* and Antony House the effect was almost immediate. Prior to the film they had a steady number of 20,000 visitors per year but after the exposure they had a sudden influx of 83,000 visitors. The table also shows a longer term effect such as in the case with *Braveheart* and National Wallace monument outside Stirling in Scotland. The place had just 40,000 visitors before the film depicting the story of William Wallace. In 2009 the monument still received 126,000 visitors which remains a substantial increase compared to figures before the film. It is likely that people have, in many cases, become aware of William Wallace through *Braveheart* and therefore want to visit the monument. Thus, there seems to be a clear correlation between the increase in visitors to a destination and the exposure of the destination in a screen product. However, in the case of cities and larger areas it is far more difficult to measure this effect. In Forks in the USA, which is a small town, the numbers of visitors show only those who visited the Visitor Centre which may only be a fraction of all the visitors to the town. However, this number is still interesting because it is then possible to presume that the overall number of visitors have increased in the same way. This table has only given some examples of the potential correlation between the exposure of a destination in a screen product and the increased interest amongst tourists to visit.[168]

Film/TV series	Destination	Before release	After release
Alice in Wonderland	Antony House, England	20,000 visitors in 2008	83,000 visitors in 2011[169]
Arn	Different locations in Skaraborg, Sweden	150,000 visitors in 1999	360,000 visitors in 2009 [170]
Balamory	Tobermory, Scotland	400,000 visitors/year	550,000 visitors/year[171]
Braveheart	National Wallace Monument, Scotland	40,000 visitors [172]	126,000 visitors in 2009 [173]
Miss Potter	Hilltop Farm, England	64,500 visitors in 2006	103,000 in 2009 [174]
Captain Corelli's Mandolin	Kefalonia, Greece	80,000 passengers arriving on charter flights/year in 1993	170,000 passengers arriving on charter flights/year in 2002 [175]
Harry Potter	Alnwick Castle, England	60,000 visitors/year	132,000/year [176]
Heartbeat	Goathland, England	200,000 visitors in 1991	1.2 million/year [177]
Pride and Prejudice – TV version	Lyme Park, England	32,852 visitors in 1994	91,437 visitors in 1995[178]

168. See further examples in: Hudson & Ritchie, (2006b) and Riley, Baker, & van Doren, (1998)
169. National Trust (2012) PPT Presentation by Harvey Edgington
170. Praesto, Anja (2011) PPT presentation "Med fantasin som vapen, slaget om turisterna" from http://www.slideshare.net/anjpr/tillvxt-klar lven; Arnturismen 2004 (2005) report by Turismens Utredningsinstitut from http://www.vastsverige.com/Documents/vastsverige/2004_Arnturismen.pdf
171. Connell (2005)
172. Stately Attraction: How Film and Television Programmes Promote Tourism in the UK (2007) from http://industry.bfi.org.uk/media/pdf/a/6/Final_Stately_Attraction_Report_to_UKFC_and_Partners_20.08.07.pdf
173. Visit Scotland (2010) The 2009 Visitor Attraction Monitor
174. National Trust (2012) PPT Presentation by Harvey Edgington
175. O'Neill, Butts, & Busby (2005)
176. Stately Attraction: How Film and Television Programmes Promote Tourism in the UK (2007) from http://industry.bfi.org.uk/media/pdf/a/6/Final_Stately_Attraction_Report_to_UKFC_and_Partners_20.08.07.pdf
177. Mordue (2009)
178. Stately Attraction: How Film and Television Programmes Promote Tourism in the UK (2007) from http://industry.bfi.org.uk/media/pdf/a/6/Final_Stately_Attraction_Report_to_UKFC_and_Partners_20.08.07.pdf

Film/TV series	Destination	Before release	After release
The Da Vinci Code	Rosslyn Chapel	36,635 visitors in 2002 [179]	138,849 visitors in 2009 [180]
The Lord of The Rings	New Zealand	1.61 million international visitors in 1999	2.5 million international visitors in 2008 [181]
Tomb Raider	Angkor, Cambodia	100,000 visitors in 1999 [182]	1.5 million visitors in 2011 [183]
Twilight	Forks, USA	18,736 visitors in 2008 [184]	69,975 in 2009 [185]
Winter Sonata	Nami Island, Korea	In 2003, 111,415 foreign visitors [186]	In 2005, 295,000 foreign visitors [187]

Figure 5: Table showing different film/TV series and the number of visitors to portrayed locations.

Summary: Screen Tourists

- Tourists' image of destinations is in many cases influenced by a range of media products such as screen products. This image will have an impact on tourists' expectation of the destination and influence their choice of activities.
- The more media influences that a tourist is exposed to, the more complex is the image created. For a smaller destination like a village or a single attraction like an estate the screen product may be the only source of information whereas for a big city it is difficult for the tourist to pinpoint a single media product as the motivating driver.
- A screen product can alter an already existing image or create a new one. A destination can therefore receive new target groups of visitors if the new image attracts another type of visitor.
- There are many factors in a screen product that can influence tourists; some of them are connected to the screen product whereas others are related to the individual tourist. It seems to be common that the landscape and scenery of the film is one of the key factors for creating an interest in visiting. Having fun and doing things that are a bit out of the ordinary are other contributing factors.
- The statistics show in many cases that only a limited amount of visitors state that film is the primary reason for visiting a destination. However, tourists are not always aware of what inspired them in the first place because there might be multiple sources and since we live in a media saturated world screen products are most likely an inspirational source.[188]
- The reason for visiting differs whether you are a day visitor or a tourist. A day visitor might refer to a screen product as the main reason for choosing to visit a certain castle, house or village whereas it is just one reason amongst others for tourists.

3.5 Tourist Product Development

This chapter will highlight different products that have been developed in order to capitalise on screen products' potential effect on tourism. These products are developed both by official organisations, for example destination marketing organisations, and by film commissions, whereas other products are developed with a commercial interest from private companies. There are also other initiatives that come from other types of organisations, for example the National Trust in England, a conservation charity.

The first section will look at movie maps, in printed and digital form, guidebooks and the use of websites for film tourism as well as apps for mobile phone use. This will be followed by guided tours and dedicated film tourism attractions. The final section addresses additional tourism products that have been developed for exploiting the potential that screen products can offer.

179. Visit Scotland (2003) The 2002 Visitor Attraction Monitor
180. Visit Scotland (2003) The 2002 Visitor Attraction Monitor
181. International visitors, New Zealand series C10 (2009) report from www.tourismresearch.govt.nz/profiles
182. Winter (2002)
183. http://www.traveldailynews.asia/news/article/50312/angkor-wat-and-the-management
184. The number of visitors to the visitors centre
185. Leigh Smith, Barbara. (2010) The Twilight Saga and the Quileute Indian Tribe: Opportunity or Cultural Exploitation? The Evergreen State College from http://nativecases.evergreen.edu/docs/Smith%20The%20Twilight%20Saga%2012%2022%2011.pdf
186. No data is available before on international visitors, but this is in the beginning
187. Kim, Long, & Robinson (2009)
188. Månsson (2011a)

Movie Maps, Guidebooks, Websites and Mobile Phone Applications

One of the most common marketing tools relating to film tourism is movie maps. They provide a very accessible way of promoting both the destination as well as the selected film(s) in order to raise awareness of the locations and encourage an interest in visiting the portrayed places.[189] The movie map is a method of packaging a destination to make it attractive to tourists. In many cases these marketing tools are funded by public money, for example by destination marketing organisations and film commissions.[190] Movie maps started to appear in the 1990s and one of the first to be released was a British movie map by BTA (British Tourist Authority)[191] which portrayed 60 years of British film and TV. The purpose of the map, according to the campaign manager, was to increase the seasonal spread of visitors to heritage locations, city destinations as well as to other areas of the British countryside.[192] It is interesting to note that this first movie map campaign only focused on overseas markets with no intention on targeting domestic tourists. Movie maps are products with a high impact on tourists, demonstrated by a UK study which revealed that 46% of respondents took a short break after receiving a movie map at home and 87% of them visited new areas.[193] The map was also used for planning the trip by 43%. There are now numerous movie maps produced all over the world, available both in print and digital format, as will be seen in the examples below.

- Between 2003 and 2009 Film London collaborated with Visit London to produce a range of movie maps, some in print and all available online for download, featuring film locations across the UK capital.[194] Whilst some of the movie maps focused on themes such as *London on Film*, *Southbank Movie Trail and Bollywood* others concentrated specifically on individual film titles including *Love Actually, Bridget Jones: The Edge of Reason and Thunderbirds.* The maps were distributed in cinemas, cafes, bars and tourist information outlets across London and each map was publicised with a press release highlighting the locations and exploiting the opportunity to profile the work of Film London. Film London's Bollywood movie map, which achieved significant regional, national and international press coverage when released in 2006, remains popular today with 1632 downloads in 2011 and 2330 in 2012. Film London worked closely with a range of partners to produce and promote each map, teaming up with relevant locations and businesses to include interesting information about the film and promotional offers to attract visitors to their destinations. The movie map for the film *Closer* contained vouchers with deals to attractions featured in the film such as the National Portrait Gallery and the London Aquarium, both of which appeared in the film. These maps are interesting in that despite some of the films being released over 8 years ago they are still being downloaded, demonstrating that films have a lasting effect from a tourist point of view.

- In Spain, a range of movie maps have been produced covering different regions and cities in the country. In Andalusia, the first Spanish movie map was produced in connection with the film *Alatriste* (opened in 2006).[195] 60,000 copies of the map were printed and distributed to tourist offices nationwide. Another map was produced in relation to the film *Summer Rain* (120,000 copies were printed as well as being available digitally) in both Spanish and English due to the director being well-known actor Antonio Banderas. The map promoted film locations in Malaga and was distributed to 4,000 cinemas, film festivals and other markets. As extra promotion, Andalucía Film Commission managed to get Banderas to pose with the movie map at a film festival thereby attracting extra attention for the product. Tourism Andalusia supported the film because it was seen as a postcard of Malaga. The map highlighted the featured locations further and the aim was to create awareness of Malaga as a film destination for the tourist industry, film producers, directors and key film decision-makers as well as tourists.[196] Another interesting example comes from Almeria, also in the region of Andalusia, where the Commission of Almeria with the Tourism Foundation, The Rural development group of Filabres Alhamilla and the Cultural Council produced a movie map which is more like a guidebook called *Landscapes of Cinema*', featuring locations from older films such as *For a Few Dollars More* and *Indiana Jones.*[197] Thus, even older releases, can be used to package and showcase the destination. All of the examples above focus on using films to showcase a destination but Barcelona has also produced movie maps that concentrate on the work of a single director. There are two different maps available: one on Woody Allen and the other on Pedro Almodovar.[198] Though Almodovar is perhaps more connected to Madrid, no movie map is available there. Instead there is a designated page on the Madrid tourism website which lists places of interest to explore in Madrid.[199] So whilst a movie map or website can use films and locations to profile a destination it is also possible to focus on other elements related to screen products such as the director. However, currently there seem to be less of these kinds of products in circulation.

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189. Beeton (2005); Busby and Klug (2001)
190. Busby and Klug (2001)
191. Since 2003 the organisations is named Visit Britain
192. Busby and Klug (2001)
193. Set jetting (2007) a report by Mintel Oxygen
194. Internal material submitted by the partner Film London
195. Questionnaires responded by Andalucía Film Commission and Malaga Film Office
196. Questionnaire Malaga Film Office
197. Collection: cinema y tourism in the province of Almería (2008) Landscapes of cinema download guide from http://www.tabernasdecine.es/publicaciones/paisajes-de-cine.pdf
198. http://www.barcelonadepelicula.com/rutes.aspx
199. http://www.esmadrid.com/en/portal.do?TR=C&IDR=532

- In chapter 3.3 looking at marketing, two Polish cases were illustrated. Movie maps were produced for both, one showing places connected to the TV series *Father Matthew* in Sandomierz and the other a virtual tourist trail called *Follow the footsteps of Komisarz Alex* in Lodz showcasing places of interest based on the TV character. This is only available in Polish as the TV series is only broadcast in Poland, however, the English pages on the city of Lodz's website highlights the well-known directors that are connected to the city.[200]

- All of the previously mentioned examples are produced by film commissions or tourism organisations. However, organisations such as the National Trust in England also produce movie maps to show where their estates have been used as locations for films. The National Trust has created a generic movie map but also a themed map in collaboration with Universal focusing on costume drama as part of Universal's 100th anniversary. On the National Trust's website there is also more information available about different estates that have been used for film shoots.[201] These movie maps show the range of locations owned by the National Trust whilst also demonstrating where people can view these locations both physically and on screen. The National Trust has also published three movie maps distributed by Visit Britain, each one in three languages, and with distribution of 500,000 copies to its members. These screen locations might attract quite a lot of domestic visitors since it is an English organisation; however it also has a significant amount of international members. Interestingly they currently have 35,000 German members due to interest in Rosamunde Pilcher whose books have been adapted into many programmes for German TV, featuring West Country properties owned by the National Trust.[202]

- Besides movie maps, more elaborate guide books have also been developed. Apulia Film Commission has produced a stylish guide which aims to attract screen writers and producers as well as tourists to their region. It contains different itineraries that showcase screen locations in various parts of the region. The guide works both as a promotional tool before travelling, and as a practical guide while travelling.[203] AFC also organised a film location exhibition, "Scatti di cinema", presented at Venice Film festival in 2010 and also within the Apulia Region with an accompanying catalogue.

- Most of the guides mentioned above were primarily printed but with the increasing accessibility of technology, more and more consumer products are now only produced digitally. Film London has developed an interactive Google map that showcases different locations in London, based on a range of different genres (including romance, cult and horror) and themes (including Hitchcock and Dickens). In 2011 this map received 6,724 page views.[204] Visit Malta has produced an online movie product of a series of podcasts where it is possible to listen to stories about different screen locations and see images at the same time in order to help the tourists to plan their own itinerary. It is also possible to download a map.[205]

- In Andalusia, the Ministry of Tourism, Trade and Sport of the Junta de Andalusia and Andalusia Film Commission collaborated in creating a digital platform, www.rutasdecine.com, that showcases screened locations in the region. This platform can be accessed on the web, mobile and through social media. The platform is also a community where users can contribute and share experiences on film tourism.[206] Thus, instead of creating everything for the potential tourist, tourists can now be active in creating content that can be used by others.[207]

- Visit Scotland collaborated with Disney Pixar for the release of the film *Brave* in 2012. Visit Scotland created a dedicated website to the film *Brave*. It included different itineraries that could be downloaded in the following themes: Clans and Scottish Culture, Wildlife, Scottish Castles, Myth and Legends, Inspirational Landscapes and Ancient Scotland. The website also included opportunities to learn more about attractions and activities related to the theme of the film as well as various video clips. The website also included a "Library of Scotland". This was a more playful and interactive part of the website that let the users learn more about Scotland and its attractions through an animated Library.[208] The *Brave* website and marketing campaign is interesting because what is offered are tourists experiences that already exist in Scotland, packaged in a new way that was linked to the themes of the film such as Myth and Legends which included Loch Ness as one of the attractions. This shows that it is not only new attractions that can be interesting for tourists; it is a matter of presenting attractions in new and innovative ways.

- Ystad first started to produce maps focusing on the character *Wallander* in the beginning of the 1990s, initially based on the books. Initially it was not a strategic tool; it was created as a response to visitors going to the tourist office to ask for the locations in the books.[209] Later, locations from the films and TV series

200. Material submitted by the partner RARR S.A. Poland
201. National Trust (2012) PPT Presentation by Harvey Edgington; http://www.nationaltrust.org.uk/visit/days-out-and-itineraries/page-1/
202. National Trust (2012) PPT Presentation by Harvey Edgington
203. Apulia – A film tourism guide (2012)
204. Internal material submitted by the partner Film London
205. Visit Malta (2013) from http://www.visitmalta.com/en/podcast-movie-locations
206. Questionnaire responded by Andalucía Film Commission
207. Månsson (2011b)
208. Brave website (2013) from http://www.visitscotland.com/brave/
209. Internal material submitted by the partner Ystad Municipality

were also included. These maps showcase different places associated with the character and they have been very popular. They have been produced in different languages to target specific markets, for example the German market. Since 2009 the maps have been combined with a dedicated *Wallander* website.[210] This site has been developed in collaboration with the author of the books, Henning Mankell. A mobile phone application is also linked to the site which is possible to download for free and provides similar content to the website. The application was downloaded 178 times between July and September 2012. The municipality of Ystad has also produced another mobile app called "The Walk of Film" highlighting different screen locations in Ystad: it was downloaded 886 times between July and September 2012.[211]

- Visit Britain launched a free mobile phone app in 2009 called "British Film Locations".[212] The app is a generic platform that promotes British film locations and allows users to upload their own location pictures and engage with their social media networks instantly through the app. It includes 332 film locations, of which approximately 68% are in London.[213] The app also has the ability to promote certain films that link to other promotional campaigns. The first app received a lot of media attention and was the most downloaded travel app in December 2009 (50,000 downloads). It initially featured *Sherlock Holmes*, a film that Visit Britain promoted at the time, and later rebranded with a focus on *Robin Hood*. In the autumn of 2012 it was the Bond film *Skyfall* that was featured, the app receiving over 100,000 downloads and entering the top ten of most downloaded travel apps.[214] The app is downloaded approximately 250-300 times per week, mainly by domestic consumers.[215]

This section has shown the importance of movie maps as a marketing tool and their function of packaging the destination for tourists. Initially they were predominantly available in print while currently they are mainly presented digitally, in many cases available to download for potential tourists. Additionally new media platforms are also created, including mobile phone apps and interactive websites where the tourists can communicate with each other as well accommodating consumer generated content.

Guided Tours

Guided tours are one of the most common activities related to screen tourism and a frequent feature of tourism in general. Screen products are a new way to show or package a destination. Screen products can in most cases be used as a marketing tool and movie maps can be a tool for marketing and packaging a destination. However, to develop a guided tour there needs to be a steady flow of visitors which gives larger destinations and visitor attractions an advantage. A relevant issue is also whether these tours run as a private business or whether they are organised by a tourism organisation, museum or similar organisation since a museum for example can include a tour in their ordinary business whereas a private business has to make a living out of it. Seasonality is also a key factor in the development of guided tours for smaller destinations as there is a lack of visitors in certain parts of the year.[216]

- The first example of a guided tour following a film release is the Millennium Tour in Stockholm which also includes locations from the books. Run by the Stockholm City Museum, it is a two hour walking tour that blends the locations from the books and the films with the story of the city of Stockholm. The tours began in 2008 and eight tours were conducted throughout the year. In 2009 there were 222 tours and in 2010 it increased to 284 tours. Thus, there has been a growing interest for this guided tour that runs throughout the year, mainly presented in English. This tour particularly attracted French and British visitors to Stockholm[217] and a French travel agent even included the tour into their travel package of Stockholm.[218]

- The next case study is also Swedish and comes from Ystad. Since 1997 the town has guided tours with an old fire brigade that drives through the town to locations associated with *Wallander*. This tour has remained popular and in the summer of 2012, 737 people took part. The tour is revised when new episodes related to *Wallander* are broadcast. However, guided walking tours are also offered in the town as well as guided bus tours in the landscape that shows locations outside of the town.[219]

The two Swedish cases illustrate the impact of a single film or TV series (*Millennium* and *Wallander*) in the offer of guided tours in a town or a city. However, for a city like London the number of guided tours is tremendous, both within and outside the city. They are offered as walking tours as well as bus trips and boat trips.

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210. http://www.wallander.ystad.se
211. Internal material submitted by the partner Ystad Municipality
212. Visit Britain (2010) Sherlock Holmes, Global Evaluation Report
213. Material submitted by the partner Film London
214. Denitsa Mihova, Partner Marketing Manager, Visit Britain (2012) YouTube clip of a presentation hold at a conference organised by Midjysk Turisme, November 20.
215. Material submitted by the partner Film London
216. Interview with Annamari Thorell (2012)
217. Millennium report (2011) from www.frsm.se/download/18.1a1b7a5b12f8a8e79f98000157/Millennium_Rapport_20110407.pdf
218. Visit Sweden (2009) from partner.visitsweden.com/sv/Startsida/Press/Pressmeddelanden/2009/Millenniumhype-gor-franska-journalister-nyfikna-pa-Stockholm/
219. Internal material submitted by the partner Ystad Municipality; Questionnaire responded by Ystad Tourist Office

- There are 32 listed businesses in London offering movie tours. Most businesses offering movie tours are small to medium sized tourism businesses, mostly run as a family business or individually-run business. The types of tours offered are walks, bus tours, chauffeur driven tours, and private tours and they are run throughout the whole year. Many of the businesses offer similar tours. The most popular ones according to the number of tours offered are Harry Potter-themed, followed by period drama and James Bond related tours. Some offer a mix of old and new films in more generic tours whereas others focus on one film or TV series. The latter are more frequent.

- A London based movie tour company established in 2009 started up their business due to personal motives when they could not find a Bond location tour that they wanted to take part in.[220] The company started with eight tours, including James Bond and Harry Potter. Today they run 30 different tours across the country. Since the start they have had more than 30,000 participants on their tours. They all attract slightly different participants largely dependent on whether film or TV productions have been released and broadcast nationally or internationally. A tour that has become highly popular lately is the *Downton Abbey* tour which is particularly sought-after by American tourists but is also perceived very well domestically. The owner of the company states that generally tours are popular because visitors want to get inside information of their favourite shows and want to see the locations in real life. The company works with different partners such as Visit Britain and other tourist boards as well as relevant partners including location managers who help them match the places seen on screen, in order to co-ordinate these trips. Thus, in order to run these tours a diverse network of partnerships is needed to tie it all together.

- Another UK company started in 2007 out of a passion for the 1995 BBC version of *Pride and Prejudice* starring Colin Firth and Jennifer Ehle.[221] It runs more specialised and exclusive tours of England to film locations connected to period dramas such as *Pride and Prejudice*, *Downton Abbey* and films related to Jane Austen. Production experts work as their guides and hotels are chosen to be as close as possible to the period drama. The tour caters for small groups of participants. Their aim is to offer access to places that are off limits to the regular visitors and provide details of when the filming took place.

These were just two of the numerous companies that offer guided tours in and around London. In Vienna, Austria, there is a slightly different tour package offered focusing on *The Third Man*, a black and white film with Orson Welles in a lead role from 1949.

- The tour in Vienna around *The Third Man* is a package of four different activities, marketed in a single booklet, but can be bought either as a package or as single activity. There is a guided walking tour that has been running for nearly 20 years, a The Third Man Museum, The Burg Kino that still shows the film and finally the "Kanal tour" that takes the visitors into the sewers of Vienna.[222] The "Kanal tour" started in 2007 by Wien Kanal, which is run by Vienna City Council, and this tour takes visitors into the sewer systems of Vienna in the footsteps of Harry Lime's character in the film. In addition to being a tourism offer for the city of Vienna the guided tour is also an opportunity for the city administration to present and talk about their work in the canal system and inform visitors about the canal itself (beyond *The Third Man* locations). Visitor numbers have steadily increased since 2007 and a total of 80,000 visitors (as seen in figure 6 below) have participated in The Third Man Tour offered by Vienna Canals.[223]

Year	Visitor numbers
2007	7,358
2008	11,198
2009	12,464
2010	15,809
2011	16,820
2012	17,077
TOTAL	80,726

Figure 6: The table shows the increase of visitors from 2007 to 2012.[224]

The Third Man Tour is an interesting example as it was initiated by the Vienna Canals as a tool to communicate their work in a more positive light, whilst also managed to create a popular tourist activity. This package of tours also shows that in order to develop screen tourism is it not necessary only to focus on the latest screen product released. The examples mentioned in this section show the popularity of taking part in these kinds

220. Interview and material concerning a movie tour company in London is collected by the partner Film London
221. Material collected by the partner Film London
222. 3 Mann Tour Vienna booklet (2013) Wien Kanal
223. The material of The Third Man Tour is collected by the partner Film London
224. Ibid

of tours from a tourist perspective but also in terms of operating such a service. Movie tours offer a new perspective compared to tours that primarily focus on history and old buildings and therefore might attract a new audience. Research conducted with visitors taking part in a two week *Lord of the Rings* tour of New Zealand, revealed that some of the participants had not read the books or seen the films that the whole tour was based on.[225] This research shows that it is not even necessary to be a fan to find it interesting to take part in movie locations tours as they offer a new way to explore a destination.

Visitor Attractions

The third category of tourist product that is addressed in this chapter is constructed visitor attractions. These are attractions that are created specifically in order to interest screen tourists. In general, it is argued that places connected to the story of a destination are more likely to be interesting for tourists. However, that is not always a necessary prerequisite as some of the examples will show below.

- In Malta the film *Popeye* was shot in 1980 at Anchor Bay. The story of the film takes place in a fictional location in the US. In order to get permission to build the set, the producers made a huge investment that involved 165 men working for more than seven months to put together the 19 wooden buildings and the 200ft-plus breakwater built to protect the set from the sea. The film set still remains and it has grown to be a major tourist attraction on the island. Thus, it is possible to visit the village in the film, Sweet Haven village. The film set is incorporated into a fun park that offers a range of activities such as boat rides, trampolines and slides. This is an interesting case as it shows the longevity of screen tourism and demonstrates that the authenticity of the locations is not always the most important aspect.[226]

- A far more recent themed attraction opened in April 2012: the Warner Bros. Studio Tour London – The Making of Harry Potter. It is a permanent behind-the-scenes walking tour which takes its visitors into the world of film-making and the sets of the Harry Potter film series.[227] The tour offers authentic sets, costumes and props as well as showcasing British crafts, technical crew and talent behind the production of these films. Visitors get a behind the scenes perspective on the making of the films. The tour is located on the site where Warner Bros. studio filmed the Harry Potter series for over 10 years. Thus, this is a location already connected to the films which makes it an authentic place. The same applied to visitors at the set of *Coronation Street* who considered the set as an authentic place and therefore deemed it an important place to visit.[228] The Harry Potter Tour has been popular since opening to the public and even with a capacity of 5,000 visitors per day tickets are often sold out months in advance.

- In Ystad the municipality has developed a film museum which is run by the Council to combine exhibitions, two guided tours and different visitor activities. The museum also provides guided tours to the film studios in Ystad. It is an arena for those interested in film-making in general and particularly films made in Ystad. Between April and August 2012, 2,627 people took part in the guided tours which are getting more popular amongst international visitors to the town. This could be linked to the fact that the BBC produced English versions of *Wallander*, attracting a whole new group of audiences in a range of countries.

As seen in these cases it is possible to develop some kind of attraction based on the making of a film. However, there are more risks related to this since the investments are higher. There is an example of this in Sweden where Götene municipality invested 7 million SEK (approx. €0.8 million) in a theme park called Medeltidens värld (A Medieval world).[229] It was triggered by the interest in the fictional medieval character Arn based on Swedish popular books and films. The foundation was a set from the movie and then a whole medieval park was developed to become a tourist attraction. The park opened in 2008, only half finished and receiving 25,000 visitors, a figure which was sustained the following year. However, they had aimed to receive 50,000 visitors per year so the attempt has thus far failed and the municipality has lost a lot of money, having invested 74 million SEK (approx. €8.5 million) since 2007. There are many reasons for its failure including a lack of visitors and also management problems.[230] As Medeltidens värld shows, it is difficult to determine in advance what will succeed as a film tourist attraction like the set of *Popeye* and what will be an economic failure from a touristic point of view.

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225. Buchmann, Moore, and Fisher (2010)
226. Material submitted by the partner FTZ, Malta
227. Harry Potter (2013) from http://www.wbstudiotour.co.uk/
228. Couldry (2005)
229. Götene kommun (2012) http://www.gotene.se/kommunochpolitik/bolagochfastigheter/medeltidensvarldab/medeltidensvarld/medeltidensvarldisammandrag.10735.pdf?properties=70.f0a1be1126623062d27ffe2722; Götene kommun (2007) http://www.gotene.se/kommunochpolitik/bolagochfastigheter/medeltidensvarldab/kommunfullmaktigebeslut2007.156.pdf?properties=70.f0a1be1126623062d27ffe2722
230. Ibid

Additional Tourism Products

There are many other products that can be developed around screen products. These are a range of initiatives:

- Film London developed a London Underground Film Map in collaboration with London Underground and Transport for London. Film London was responsible for researching the content of the film map and leading on the content development. This work involved researching over 300 Underground stations for film, TV and movie star references. The BFI (British Film Institute) provided additional research material and helped promote the London Underground map as part of the BFI London Film Festival in 2010 which gave the project a significant promotional platform. The product is a creative example of taking something familiar such as the London Underground map and replacing the stations with names of movie stars or films relating to the locations. The product has been popular and it is still for sale on the Transport for London website. It is an opportunity for Film London to showcase that the city is full of film history and locations offering potential as visitor attractions.[231] For tourists it is a fun memento that can be taken home as a souvenir.

- Another example of product development is Film London's Imagegraphy exhibition *Love from London: A City of Stars* which was developed in collaboration with Getty Images. Getty Images has a range of iconic pictures of London locations and film legends and Film London negotiated a partnership to use these images to run postcards with film stars at famous London locations. An exhibition displaying large prints of the iconic images was organised in partnership with Getty who provided the gallery space and managed the fundraising and launch event. The collaboration was based on a branding partnership between Film London and Getty Images: Getty provided free use of images in return for prominent branding on associated marketing materials including postcards and posters which provided free advertisement value for Getty Images. Film London also partnered with London Underground who provided free advertisement space for Love from London posters, thus promoting the exhibition as well as Film London and Getty Images. The impact of this campaign was significant: achieving press coverage including pieces in Italian Vogue and references in Lonely Planet. This is an example of creating something new out of material which already exists, in this case the images of London's long history as a film cultural city and film production centre.[232]

- The village of Júzcar, Spain, took the opportunity to develop a range of products in the wake of its promotion as the Smurf Village. Prior to the promotion, the village had difficulties selling its products to tourists; since the promotion everything that contained the word "Smurf" sold automatically, for example dried chestnuts.[233] Today they are known as "Smurf Village dried chestnuts" and all tourists passing through the village buy this local product. This also applied to other merchandise associated with the movie such as shirts and souvenirs. The village has also co-ordinated their efforts in order to develop more products and opportunities for tourists, like opening of a sandwich shop, gift shop, handcrafts, hotel, tea bar, restaurants and products from the village (e.g. mushrooms, honey). Thus, the Smurf promotion created an entrepreneurial drive in the village. Special activities are now run at the weekends for visitors and empty houses are planned to be used as holiday rentals. This case illustrates the impact that screen products can have on a small location even if the destination does not feature in the film and is only used for promotion.

There are many other tourist activities that have been developed in Ystad based around screen products, including:[234]

- Open air screenings at the main square in Ystad 2009 and 2010.
- Crime film festival in Ystad 2009.
- Film conference, Mixed Reality, in Ystad 2009, 2010, 2011and 2012.
- Imagegraphy exhibitions with Imagegraphs from films in Ystad.
- "Walk of Film" in Ystad to show that films are being produced in the town.
- Hotel packages in Ystad, with a stay in a hotel, dinner at a restaurant where the fictional character Wallander has a coffee and pastry at the local café.
- The development of a special pastry called "Wallander".
- Developed merchandise products with the slogan "So this is where the killings took place".

Similar activities are found in other places with exhibitions of props or still shots from the films, film conferences, hotel packages, activity packages and also the use of a film festival to create an awareness of the destination.[235] Thus, there are many different activities that can be developed in a destination. For a single attraction a screen product can have a huge impact on visitor numbers.

- Highclere Castle is a privately owned estate that is used for the filming of the TV series *Downton Abbey*. Before the use of the location in the TV series they received around 500 tourists but that has all changed

231. Internal material submitted by the partner Film London
232. Ibid
233. Interview with David Fernández, Meyor in Júzcar, and the other material are collected by the partner Promalaga, Spain
234. Questionnaire completed by Ystad Tourist Office
235. See for example Millennium - Stockholm, Lodz - Komisarz Alex, Apulia, Tirol, Malta

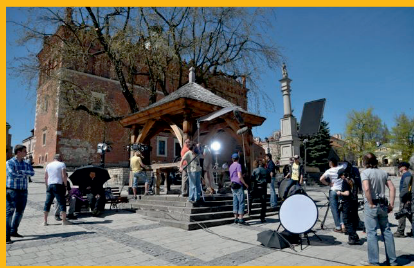
now. Since the start of the series in the autumn of 2010 they receive 1300 guests a day, despite the fact that the house is only open to the public for a limited time each year because it is a private estate. Another reason for the limited access is that filming still takes place. The castle is now running a successful gift shop, promoting itself as a venue for weddings and corporate events besides day visits for guided tours.[236]

Summary: Tourist Product Development

- There are many products developed for screen tourists. However, it seems that a lot of the products are developed by official bodies but it seems like there are a lack of screen tourism activities developed by private businesses. This lack of understanding or interest from local businesses to develop products is a difficulty addressed by Ystad[237] and Cine Tirol.[238]
- Seasonality is an aspect that might have a negative impact on the willingness for local entrepreneurs to develop products because there are only a few months to make the investment worthwhile.
- It is therefore important to raise the awareness amongst local businesses to show the importance of screen tourism for developing new tourist products.[239]
- Printed movie maps were the original tool for marketing screen destinations but the range of products is getting wider with new media platforms such as mobile phone applications and also platforms for user generated content.
- This section has shown that both small investments and large investments can trigger an interest in screen tourism.

236. *http://www.highclerecastle.co.uk/; http://www.theglobeandmail.com/life/travel/destinations/article7211873.ece; http://www.sfgate.com/travel/article/Downton-Abbey-s-setting-open-for-tours-4221140.php#ixzz2JwH8yEXV*
237. *Questionnaire and material supplied by the partner Ystad Municipality*
238. *Questionnaire completed by Cine Tirol*
239. *Cf Ystad and Tirol*

4. Best Practice



Chapter 3 has given a broad picture of the experiences within the partnership as well as introducing some other relevant examples from additional regions and countries in Europe and the rest of the world. The previous chapter highlighted the benefits of film and TV production for a destination - during as well as after filming - and the economic benefits gained from these activities from a tourism perspective. However, in order to achieve economic benefits it is important for the destination to control the process from a management perspective and scrutinise which strategies need to be implemented as well as defining the relevant partners for collaboration. The next step is to identify and develop the relevant marketing activities which can vary from traditional marketing to digital strategies. The aim is to create an attractive and positive image of the destination, appealing to potential tourists. Finally, several tourism products have been discussed in the previous chapter. Initially it was movie maps that were the most common items to be produced, leading to further ideas developing into what is now a wide range of products available.

When analysing the different examples in chapter 3 some cases of best practice emerge as essential for successful work. Based on the previous findings, the following five practices, for the development of screen tourism were revealed which will all be further developed in this chapter.

- Policy Initiatives – this is the key for development since policies are in many cases the trigger for development activities (4.1).
- Strategic Partnerships (public-public) – in order to fulfil the developed policies there is a need for collaboration between different public organisations (4.2).
- Strategic Partnerships (public-private) – there is a need for strategic partnerships between the public and private sector because it is often the private sector who deliver service to tourists (4.3).
- Destination Development – the initiated policies and the different strategic partnerships will then have an impact on the overall destination development (4.4).
- Commercial operators, SMEs and other organisations – private sector initiatives (4.5).

These practices impact on various aspects of the tourism industry of the destination. Thus, in this chapter the focus lies on the relationship between a practice and the potential outcome and the activity that triggered the effect. Five main areas of interest have been identified:

- Destination awareness – the impact of a practice on creating an awareness of the destination amongst tourists.
- Influence a brand – the impact on the branding of a destination.
- Creative marketing activities – different practices that can create new ways of marketing.
- Organisation – a practice impact on managerial and organisational aspects.
- Product development – the impact of a practice on the development of tourist products.

The five areas of interest will all be analysed in relation to all five practices previously mentioned. Each section ends with a small table that highlights different cases that are included in this report. The full table is then displayed in section 4.6 which also includes page numbers indicating where to read more about each case in the table.

4.1 Policy Initiatives

Policy initiatives are essential to create a long-term effect. Polices are the foundation for all future work. Thus, in order to capitalise on the potential effect of screen tourism it is important to start the development process on a policy level. The reason is that the policies have an overall impact on a destination and set the agenda for strategies and partnerships as well as future development of tourist products. Policy-makers create policies that initiate change and a positive impact. Policies also demonstrate a commitment to funding and resourcing work in this area (public organisations), which is not otherwise prioritised. Furthermore, initiated policies will have a trickledown effect on the destination. The policy level is therefore vital as the starting point for future development.

A good example of a strategic policy initiative is Malta's policy with regards to incentives for production. According to the policy those films portraying "Malta as Malta" receive higher funding as well as additional assistance in comparison to those who only use it as a substitute location. It is a pro-active strategic policy which can create long-term and higher destination awareness amongst potential tourists of Malta as a place to visit. Therefore a policy can have an effect on a destinations' overall image.

Another policy effect could be the influence on the destination brand. In Apulia there has been a policy development on a government level where it was decided to establish a creative cluster that aims to boost the region. In this case organisations from different sectors had to collaborate in order to develop the brand of a creative region and to fill it with content. A policy can also affect organisational perspectives. It defines how different organisations are connected and ought to work together both internally as well as externally. Ystad Municipality decided that film should be integrated into all levels of the council's work. Film in this sense is not only the interest of the film co-ordinator or the tourist office but also affects other departments within the council. In New Zealand they even appointed a minister during the shooting of *The Lord of The Rings* in order to capitalise on the interest for New Zealand as a destination and to create a sustainable level of ongoing interest.

The case of Cine Tirol is another good example where the policy has an impact on how they are organised. It was a strategic policy decision that the film commission would be part of the tourist destination organisation which connects the two sectors at an organisational level.

Establishing policy initiatives is consequently the first step in order to develop screen tourism. There are many policy examples which have demonstrated an effect on a range of areas. Each destination therefore has to focus on the most appropriate policies in terms of their regional and local context. Some good examples of existing policies identified by this report are shown in the table below.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Policy initiatives	Malta's tax incentive policy Apulia regional collaboration with focus on creative industry	Apulia partnership (Apulia Film Commission and Puglia Promozione)		Apulia regional collaboration with focus on creative industry Cine Tirol Film Commission Ystad Municipality New Zealand: Minister	

Figure 7: Table showing different policy initiatives.

4.2 Strategic Partnerships – Public/Public

The second example of best practice to be addressed in this chapter is strategic partnership, especially between public agencies (see examples below in the table). These strategic partnerships could be implemented as a result of a policy as discussed in the previous section. Thus, instead of waiting for a collaboration to occur by itself, initiating collaborations can be a chosen strategy for further development. This is the ideal situation when it is a decision on a policy level that has initiated collaboration because it includes a long-term commitment. However, only a few of the cases in the table are grounded on policy level since most of them are short term tactical partnerships for a single occasion.

A collaboration strategy can be on an organisational level, if the film commission works with the tourism destination organisation. When organisations are linked to each other it is much easier to identify and use each others' strengths. Furthermore, it is a matter of capitalising on the competencies of each organisation, creating a larger impact by co-ordinating the efforts. An example of collaboration for a single activity was when the tourism destination organisation of Berlin established a partnership with Berlin Film Commission in order to secure the shooting of a Bollywood film, *Don 2*, in the city. It was necessary to combine resources, know-how and finances, in order to ensure that the filming took place. It was a mutually beneficial partnership, working for the organisations as well as for the destination since it created a higher awareness of the city and country as a tourist destination.

Strategic partnerships could also have a high impact on the brand of a destination. In the case of *The Lord of the Rings* trilogy, and more recently *The Hobbit*, several partnerships evolved in New Zealand. In order to have a high impact on the brand, different marketing activities are essential. These collaborative marketing activities might not be grounded on a policy level. It might instead be a tactical strategic collaboration where all involved organisations see a mutually beneficial situation and stand to gain from these activities. Collaborations between different public bodies could also be a method to develop tourism products. It is a matter of combining resources and competencies which was the case in the development of the London Underground Film Map as well as with the Apulia Film Guide.

Strategic partnerships between different public partners are necessary in order to develop screen products for tourism activities but as seen above most of these partnerships are not on a policy level. However, if collaboration is grounded on a policy level the likelihood of long term results is higher since it is a long term commitment from all involved parties. When collaboration only occurs on a project basis the risk is that these efforts only will have short term effect.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Strategic partnerships (public-public)	Bollywood phenomenon: *Don 2* in Berlin Visit Malta and Malta Film Commission Apulia Film Commission and Puglia Promozione	New Zealand's LOTR/*Hobbit* campaign: 100% Middle Earth, 100% pure New Zealand	Vienna Canals - Third Man Tour	Cine Tirol Film Commission is hosted by Tirol Tourist Board	Film London's movie maps & Underground Film Map Apulia's Film Location Guide Third Man tours Vienna Ystad's *Wallander* App

Figure 8: Table showing the impact of strategic public-public partnerships.

4.3 Strategic Partnerships – Public/Private

The third example of best practice is strategic partnerships between public and private partners. While some of the collaborations between public-public organisations are a result of policy initiatives, many of the public-private partnerships are instead of a strategic nature. Organisations collaborate when both can gain from the partnership: a mutually beneficial situation for both partners. One example is when a tourism destination organisation collaborates with a production company. This is a common partnership type and it is beneficial as it is expected that viewers of the film will be attracted to the destination and tourists in return might be interested in seeing the film. This collaboration is also a way of accessing each others' know-how and resources. From a destination point of view it could for example be a way of securing rights to publicity material. These partnerships could therefore enhance the awareness of the destination and in turn influence the overall brand.

The UK's national tourism agency, Visit Britain, collaborates with a film company for destination marketing purposes on one film per year. It is a tool to create awareness and enhance the brand of the UK as a tourist destination. Other good examples of creative marketing activities emerged from partnerships as highlighted in chapter 3. The painting blue of the houses in the village of Júzcar for the promotion of *The Smurf* film was triggered by an advertising agency and accepted by the village mayor. In Sandomierz the strategic collaboration went so far that the local council could influence which locations to select for filming. In this case the marketing became highly integrated into the screen product which is very effective as it is considered as more trustworthy from a tourist point of view. Another example of strategic collaboration on a more organisational level is the case of Ystad's film co-ordinator who works for the council and acts as a liaison between the film sector and the public bodies. The policy undertaken by the council determines the internal organisation of their work and at the same time creates partnerships with different organisations. Public-private collaborations could also lead to product development. Visit Britain developed a film location app as well as a *Skyfall* competition which is also a game to mention just some products that could emerge from public-private partnerships. Further examples can be seen in the table below.

Strategic collaborations between public-private organisations are primarily chosen from a tactical point of view. Some of the partnerships are ongoing while others only occur once for a special occasion. It is therefore important for a destination to identify the public or private key stakeholders with which to collaborate and the purpose of the collaboration.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Strategic partnerships (public-private)	Visit Britain's *Skyfall* campaign National Trust's work *Father Matthew*, Sandomierz Municipality	Visit Britain's *Skyfall* campaign *Brave* campaign, Scotland *Australia* campaign, Australia *Father Matthew*, Sandomierz Municipality	Getty Images exhibition with Film London Smurf village, Júzcar National Trust's work Visit Britain film campaigns *Father Matthew*, Sandomierz	Ystad Municipality: film co-ordinator	Visit Britain Film Location app Visit Britain *Skyfall* game/ competition

Figure 9: Table showing the impact of strategic public-private partnerships.

4.4 Destination Development

The fourth example of best practice deals with different processes of destination development. When the first steps have been taken to identify different policy initiatives and it has been followed by the identification of various key stakeholders (public or private) for different partnerships, this will hopefully result in destination development in various areas. Thus, the aim for the different policies and collaborations is also to create a positive destination development which could have an effect on tourism and potential tourists but also on the local people as well as SMEs and other local businesses. In other words, in order to achieve long term development it is in most cases necessary first to establish policies and partnerships and then the development will emerge as a result of these efforts.

The development process varies from destination to destination. In Ystad the municipality agreed on a strategy that film should be an overall focus for the town. In this case it is important that the results should not only have an impact on visitors but also on the local residents. However, these efforts enhanced the destination awareness as well as the brand of Ystad. A similar effect is also seen in the case of Sandomierz with the use of the TV-series *Father Matthew* as the trigger for development. The TV-series has a vital role in branding and creating an awareness of the town and region which is seen in the growing number of visitors. Finally it is important to mention that a destination development process could also have a positive effect on product development. The more there is to offer for the tourist the more interesting it will be to visit the destination. These can be new products like the newly established guided tours in Stockholm after the *Millennium Trilogy* or a re-packaging and marketing of what already exists as in the case of Scotland and the film *Brave*.

A focus on setting up policies and establishing collaborations is the key to develop destinations that are sustainable in the long run.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Destination development	Ystad film strategy, *Wallander* *Father Matthew*, Sandomierz *Komisarz Alex*, Lodz Municipality *Downton Abbey* - Highclere Castle	Ystad film strategy, *Wallander* *Father Matthew*, Sandomierz Municipality *Komisarz Alex*, Lodz Municipality Korean Hallyu dramas Smurf village, Júzcar *Millennium Trilogy*, Stockholm	Ystad Municipality *Brave* campaign, Visit Scotland *Father Matthew*, singer	New Zealand: Minister	Smurf Village, Júzcar *Brave* campaign, Visit Scotland Ystad Municipality *Millennium Trilogy* tours - Stockholm

Figure 10: Table showing different successful destination development processes.

4.5 Commercial Operators, SMEs and Other Organisations

The final example of best practice set out in this chapter deals with the processes of product development initiated by commercial operators, SMEs and other organisations in order to capitalise on the interest for screen tourism. Ideally in a destination there is a policy that leads to the creation of strategic partnerships which then contribute to the development of the destination via new tourism products. There are however many obstacles on the way for a product development to occur as will be discussed in the next sections.

It is relevant to assign ownership of the product development because screen tourism development depends on getting both the private and public sectors engaged. Either the tourist marketing organisation or a film commission can initiate the screen tourism development, but it is also necessary to engage the local businesses since it is mainly those that offer products directly to tourists whether it is a guided tour or products such as the Warner Bros Studio Tour - The Making of Harry Potter. However, this is a step where a weakness has been identified in the work so far. The problem is that there seems to be a lack of engagement and commitment to screen tourism from private businesses no matter whether they are large commercial businesses or SMEs. One reason could be the lack of knowledge about screen tourism as a phenomenon. It is therefore vital for public organisations to inform and collaborate with local stakeholders such as tourism businesses in order to achieve future tourism development. Other reasons for the lack of commitment could also be a scarcity of human or financial resources as well as the issue of seasonality. This is especially relevant in destinations that have a short tourist season because these products have only a few weeks in which they can operate. However, these products could also be the means to prolong the season.

There are successful examples of product development to be found such as the Harry Potter Studio Tour in London or the guided tours that have been developed at Highclere Castle in the wake of the TV series *Downton Abbey*. However, besides some good examples of product development this is an area were further development and engagement needs to take place.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Commercial operators, SMEs and other organisations					London guided tours Harry Potter Studio Tour, London Popeye Village, Malta Highclere Castle - *Downton Abbey*

Figure 11: Table showing different successful tourism product development.

4.6 Challenges

The previous sections in this chapter have identified and discussed the five best examples of good practice that are the outcome of this report: policy initiatives, partnerships (public-public or public-private), destination development and finally screen tourism product development. The table below summarises the practices with main illustrating cases and page numbers informing on where to read more about it in chapter 3.

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Policy initiatives	Malta's tax incentive policy (p.29) Apulia regional collaboration with focus on creative industry (p.25,29)	Apulia partnership (Apulia Film Commission and Puglia Promozione) (p.33)		Apulia regional collaboration with focus on creative industry (p.25,29) Cine Tirol Film Commission (p.32) Ystad Municipality (p.25,30,35) New Zealand: Minister (p.31)	
Strategic collaboration (public-public partnership	Bollywood phenomenon: *Don 2* in Berlin (p.25) Visit Malta and Malta Film Commission (p.32) Apulia Film Commission and Puglia Promozione (p.33)	New Zealand's LOTR/*Hobbit* campaign: 100% Middle Earth, 100% pure New Zealand (p.35)	Vienna Canals - Third Man Tour (p.47)	Cine Tirol Film Commission is hosted by Tirol Tourist Board (p.32)	Film London's movie maps & Underground Film Map (p.44,45,49) Apulia's Film Location Guide (p.45) Third Man tours Vienna (p.47) Ystad's *Wallander* App (p.45)

	Destination awareness	Influence a brand	Creative marketing activities	Organisation	Product development
Strategic collaboration (public-private partnership)	Visit Britain's *Skyfall* campaign (p.30) National Trust's work (p.27,45) *Father Matthew*, Sandomierz Municipality (p.32,36,38,45)	Visit Britain's *Skyfall* campaign (p.30) *Brave* campaign, Scotland (p.39,45) *Australia* campaign, Australia (p.37) *Father Matthew*, Sandomierz Municipality (p.32,36,38,45)	Getty Images exhibition with Film London (p.49) Smurf village, Júzcar (p.36) National Trust's work (p.27,45) Visit Britain film campaigns (p.32,37) *Father Matthew*, Sandomierz (p.32,36,38,45)	Ystad Municipality: film co-ordinator (p.30)	Visit Britain Film Location app (p.46) Visit Britain *Skyfall* game/ competition (p.46,54)
Destination development	Ystad film strategy, *Wallander* (p.35) *Father Matthew*, Sandomierz (p.32,36,38,45) *Komisarz Alex*, Lodz Municipality (p.38,45) *Downton Abbey* Highclere Castle (p.47,49)	Ystad film strategy, *Wallander* (p.35) *Father Matthew*, Sandomierz Municipality (p.32,36,38,45) *Komisarz Alex*, Lodz Municipality (p.38,45) Korean Hallyu dramas (p.27) Smurf village, Júzcar (p.36) *Millennium Trilogy*, Stockholm (p.35)	Ystad Municipality (p.25,30,35) *Brave* campaign, Visit Scotland (p.39,45) *Father Matthew*, singer (p.38)	New Zealand: Minister (p.31)	Smurf Village, Júzcar (p.49) *Brave* campaign, Visit Scotland (p.45) Ystad Municipality (p.48,49) *Millennium Trilogy* tours - Stockholm (p.46)
Commercial operators, SMEs and other organisations					London guided tours (p.47) Harry Potter Studio Tour, London (p.48) Popeye Village, Malta (p.48) Highclere Castle - *Downton Abbey* (p.47,49)

Figure 12: Table showing the main 5 practices and the potential outcomes with illustrating cases.

As seen in the full table there are a number of good cases within the first four categories though when it comes to tourist product development there is a shortage of good examples. It shows that even though some policies are in place and partnerships and destination development have started, the public sector has not succeeded in engaging the private sector in the development process. Thus, destinations that want to develop screen tourism need further strategies.

One of the challenges for the future is therefore to develop strategies that engage with the private sector and in particular SMEs. This could be done through various kinds of collaborations as previously mentioned in this chapter. Processes of collaborations are already initiated for some of the partners involved in EuroScreen. The results of these initiatives of collaboration will be possible to take part of in the final stages of this three year project. It shows that it is important to acknowledge potential stakeholders within a destination and then to explore how they can be beneficial to each other and to the tourism development.

Another challenge is to create a trickledown effect from a policy to a strategy to destination marketing. Currently many of the policies and collaborations are only isolated tactical interventions with limited overall effect as well as a lack of long-term commitment. There is therefore a need to develop strategies that have a trickledown effect for a sustainable destination development.

Merchandising is also relevant since part of the tourism experience is to take home some kind of souvenir from a visit. This could be challenging due to the copyright of names and visual features of a movie or TV series but is an area which is worth exploring, especially in terms of financial benefits to the private sector. In Ystad however it is the public organisation that developed a range of products with the slogan "So this is where the killings took place". This is an example where a creative solution has been found to get around copyright issues as the destination was not allowed to use the name of the *Wallander* movie or anything linked to it. The new product name therefore referred to the crime theme of the film that is so crucial to the branding of the specific destination.

Furthermore, it also important to create an awareness of the screen tourism phenomenon and the potential new business that can be gained through merchandise or new products. The EuroScreen project will publish a set of case studies with the aim of attracting the private sector's attention as well as inspiring public organisations which want to start or develop their own screen tourism.

A good case study from Finland that can be used as a source of inspiration for future work on engaging local businesses is the work done by the two cities Rovaniemi and Turku.[240] The city of Rovaniemi is known for being the last urban stop for tourists going on Arctic safaris. Turku is known for its university and as a film and media city. The municipality of Rovaniemi agreed that the production company Anima Vitae could use their successful animation movie and brand *Nico and the Way to the Stars* as part of their tourist promotion. Ever since, Nico is part of the city's Santa Claus Park at the Arctic Circle and several guided tours and merchandising have been created around the core story of the little reindeer searching for his father. In order to build independence from the product name owned by the production company, but to still benefit from the now well established brand, a story designer was hired to create new stories for the municipality of Rovaniemi. Tours were created for families as well as other new products and services around the story in a joint creative process with the story designer and several tourist and safari companies in Rovaniemi who paid for the story designer.

The city of Turku took another approach around a TV crime series which was to be produced in their city. The city collaborated with the production company to be able to use the series for advertising Turku as a film tourism destination. Original places in the series such as coffee shops, restaurants and buildings are part of the campaign showcasing Turku as an exciting place to visit. Elaborate merchandising was created around the TV series. However, in this case it was difficult to bring the local SMEs behind the idea of creating new products and services. The reason for this was that they found it difficult to be as creative as the story designers. Workshops were therefore organised to brainstorm, share and develop new ideas for products and services. However, the SMEs needed ongoing active support, practical assistance and coaching to actually use the opportunity they were offered. This case shows that in order to engage SMEs to the development process a number of support systems need to be established in order for it to be fully achieved.

The final challenge that has been identified in this report is the difficulty relating to the measurement of the impact that screen products have on tourism. This is due to the very complex nature of the impact measurement, which includes multiple factors such as viewing figures, brand perception, translation into direct visitors and additionality, rather than a simple measurement such as ticket sales at gated attractions. Furthermore, tourists might not be aware of what inspired them in the first place to visit a certain destination. How then can an impact be measured since it is vital to have solid proof when it comes to engaging new partners? The EuroScreen project proposes to assess potential tools to determine the economic impact of a screen production, the placement value, for the destination. This is one vital aspect in demonstrating the relevance of screen tourism but it cannot show the full picture.

To conclude, this report has shown that there are many good practices and cases already established that can be used as inspiration for future work. However, there are also future challenges to address, particularly in relation to engaging the local businesses such as SMEs and the difficulties in measurement and economic impact.

240. *The material is collected and submitted by partner Film London*

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Appendix I – EuroScreen Partners

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MAYOR OF LONDON

Film London/UK
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Apulia Film Commission (AFC)/Italy

Bucharest-Ilfov Regional Development Agency (ADR-BI)/Romania

Fondazzjoni Temi Zammit (FTZ)/Malta

Lund University/Sweden

Maribor Development Agency (MDA)/ Slovenia

Malaga Regional Development Agency (Promalaga)/Spain

Rzeszow Regional Development Agency (RARR S.A.)/Poland

Ystad Municipality/Sweden

Appendix 2 – Questionnaire

EuroScreen Baseline study

This questionnaire is divided into four parts: first your own experiences, then regional to be followed by good cases from your own country as well as any good screen tourism cases you know about from the rest of the world. However, also examples of unsuccessful projects are of interest throughout this questionnaire.

We are aware that a lot of information might only be available in your own language, however please still send/scan brochures, marketing material etc. and just provide a short summary in English.

Please respond and submit your answers to maria.mansson@ism.lu.se and lena.eskilsson@ism.lu.se by the 31st of August 2012. If you have any questions do contact us by e-mail, phone is trickier during the summer.

<u>Part 1 – your own organisation</u>

1.How do you define your organisation, which sector would you characterise it belongs to? Film commission, tourism, regional development etc.

2.What is your organisation's experience of screen tourism activities? If you have experience, how were they conducted and what were the target groups? Use as much space as you need. If you have many examples please provide the most striking examples but also if you have been involved in activities that didn't achieve the wanted results. List as many activities as you like.

Name of activity.

When took it place?

What type of screen product triggered this activity? For example movie, TV movie, TV series, documentary, commercial and so forth. Please also name the title of the movie etc.

What has been done?

Who was involved?

Who was targeted?

What was the outcome of activity?

What was the most important lesson learned from this activity?

3.Which activities has your organisation been involved in relating to marketing activities focusing on screen tourism? If you have many examples choose the most prominent marketing activities.

Name of marketing activity.

Output of the campaign.

Target groups.

Which material did you use in communication to which target group?

Impact to the brand of the destination.

Did you stay in touch with target groups after campaign, if so, how?

4. What are your experiences of cooperation between the film/screen and tourism sector? Furthermore, what were the outcomes of these collaborations.

Name and type of collaborating organisation.

What kind of co-operation?

Aim.

Outcome.

For how long did the collaboration run?

What was the most important lesson learned from this collaboration?

5. A practical question about material rights to screen content.

How did you clear the rights for using production companies' materials?

What did you require of the content production company, i.e. material to be supplied, stills from the film set, promo material, star interviews, video clip, etc.?

PART 2 – regional perspectives

6. Which good examples of businesses, tourism or film/screen sector, do you have in your region working with screen tourism i.e. walking tours, bus tours, mobile applications and so forth? Also list if you have examples of less successful businesses.

Name of business

Which services and products do they provide?

How long have they lasted?

Popularity of the business.

Is it linked to any specific screen product?

7. Which methods and techniques are used to measure the screen tourism effects of content productions at your destination (i.e. nights at hotels, restaurant bookings, sold tickets at historic & tourist sites, etc.)? If available, please provide a link to statistics or the source of information.

8.Please describe other activities related to screen tourism which are not already mentioned!

9. Incentives: are there incentives provided to the film/screen or tourism sector in your region regarding screen tourism? If you have, what are they?

Name of incentive

What it provides

Aim of incentive

10. What kinds of tourism attractions are available for screen tourists in your region? Natural attractions such as film location or build attractions such as film museums, film studio tours etc. Please provide tourist statistics if possible to show the tourism impact and flow of tourists.

Name and type of attraction

Location

Featured in what kind of Film/TV etc

Statistics available. If so, what and where is the source?

Part 3 – country perspectives

11. What are the experiences of screen tourism in your country? Provide examples of good as well as bad cases. Both film commission and tourism perspective.

Name of activity, organisation or business etc.

What has been done?

What Film/TV or other screen content?

When took it place?

Who was involved?

If possible, outcome.

Part 4 – the rest of the world

12. Provide information of other good cases, if you know, from other parts of the world! It could be related to successful collaborations between film and tourism sector, growth of tourists to regions or specified attractions, marketing campaigns, growth of SMEs, growth of brand awareness etc.

Name of activity, organisation or business etc.

What has been done?

What Film/TV or other screen content?

When took it place?

Who was involved?

If possible, outcome.

Additional questions

13. Additional information about screen tourism: links or scanned newspaper articles covering screen tourism, research reports and evaluations as well as any other documents that could be of interest for us.

14. Finally, in preparation for next year's work.

What are your expectations of the economic impact tool'?

Are you aware of or have you come across any economic impact tools, if so what are they and what did you find useful about them?

Appendix 3 – List of Interviewees

The following people were interviewed by the partner Lund University in addition to interviews conducted by the other EuroScreen partners:

Richard Bower, CCIMP, Moviemed, France (phone interview) 20121004

Angelica Cantisani, Film Commission Torino Piemonte, Italy (phone Interview) 20121002

Patrick Lamassoure, CEO, Film France (phone interview) 20120713

Christiane Raab, Film Commissioner, Berlin Brandenburg Film Commission, Germany (phone interview) 20121105

Trish Shorthouse, Film Commissioner, Highlands of Scotland Film Commission (phone interview) 20121001

Mikael Svensson, Öresund Film Commission, Sweden (personal interview) 20120918

Annamari Thorell, Consultant, KommuniAktion, Sweden (phone interview) 20121105

Appendix 4 – Visitor Numbers at Sandomierz Attractions

Number of tourists							
Tourist attraction	Year						
	2006	2007	2008	2009	2010	2011	01.01-31.08.2012
Underground Tourist Route	70,600	78,000	80,006	110,403	79,102	137,341	134,429
Opatowska Gate	32,002	63,000	67,934	99,851	74,216	127,433	(01.01-31.10.2012)
Regional Museum	32,616	69,705	70,023	101,390	34,981 (without taking into account the number of the tickets to the Castle courtyard - Museum)	55,965	
Diocesan Museum – Dlugosz House	15,689	17,479	18,000	62,592 (overstated figures)	25,055	29,259	37,285
Museum of History of the Polish Peasant Movement						5,953	19,427
Knight Armory						12,146	3,751

Appendix 5 – Image Credits

Cover (film strip from left):

Image 1 - London - Palace of Westminster - Courtesy of Film London - James Dewar

Image 2 - Romania - Courtesy of Castel Film Romania

Image 3 - Sweden - Courtesy of Fredrik Ekblad

Image 4 - Maribor - Shooting of Bollywood movie on Bled Lake, Slovenia - Courtesy of Mankica Kranjec

Image 5 - Sandomierz - *Father Matthew* – Courtesy of Municipality in Sandomierz

Image 6 - Juzcar village - Courtesy of Paulino Cuevas

Image 7 - Not applicable

Image 8 - Popeye Village - Courtesy of Jean Pierre Borg

Image 9 - Mattinata - *Housefull* - Courtesy of Apulia Film Commission

Page 7 (from top):

Image 1 - Malta - Fungus Rock - Courtesy of Clive Vella; © viewingmalta.com

Image 2 - London - *Sherlock* - Courtesy of Hartswood Films

Image 3 - Mattinata - *Housefull* - Courtesy of Apulia Film Commission

Image 4 - London - Millennium Bridge (Movie: *I See You*) - Courtesy of Eros International

Image 5 - Malaga - Playa Málaga © Malaga Film Office – James Souza

Image 6 - London - The National Gallery (Movie: *Salaam-e-Ishq: A Tribute to Love*)

Image 7 - London - The Thames Barrier – Courtesy of Film London/Jamie Lumley

Page 13 (from top):

Image 1 - London - Covent Garden - Courtesy of Film London/Jamie Lumley

Image 2 - *Wallander* set - Courtesy of Jonas Thun

Image 3 - Juzcar village - Courtesy of Paulino Cuevas

Image 4 - Maribor - Shooting of Bollywood movie in Postojna Cave, Slovenia - Courtesy of Mankica Kranjec

Image 5 - Lecce - *Mine Vaganti* - Courtesy of Apulia Film Commission

Image 6 - Sandomierz - *Father Matthew* – Courtesy of Municipality in Sandomierz

Image 7 - London - *My Week with Marilyn* ©Trademark Films Ltd 2011, Image Credit: Laurence Cendrowicz

Page 17 (from top):

Image 1 - Maribor - Shooting of Bollywood movie on Bled Lake, Slovenia - Courtesy of Mankica Kranjec

Image 2 - Malta - Popeye Village - Courtesy of Jean Pierre Borg

Image 3 - London - *28 Days Later* – Courtesy of Fox Searchlight

Image 4 - Ystad - Courtesy of Fredrik Ekblad

Image 5 - Massafra - *Amiche da morire* - Courtesy of Apulia Film Commission

Image 6 - Malta - Popeye Village - Boat Ride - Courtesy of Popeye Village

Image 7 - Ystad – Wallander's Door - Courtesy of Fredrik Ekblad

Page 23 (from top):

Image 1 - London - Tower Bridge and City Hall - Courtesy of Film London - James Dewar

Image 2 - Lecce - *Allacciate le cinture* - Courtesy of Apulia Film Commission

Image 3 - Júzcar village - Courtesy of Paulino Cuevas

Image 4 - *Third Person* - Taranto - Courtesy of Apulia Film Commission

Image 5 - London - *The Counselor* © Twentieth Century Fox Film Co

Image 6 - London - Palace of Westminster - Courtesy of Film London - James Dewar

Image 7 - London - *Borrowed Time* - Courtesy of Film London - James Dewar

Page 51 (from top):

Image 1 - Sweden - *The Bridge* series - Courtesy of Ola Kjelbye

Image 2 - London - *Lilting* - Courtesy of Film London

Image 3 - Sandomierz - *Father Matthew* - Courtesy of Municipality in Sandomierz

Image 4 - Malta - Valletta Coast - © viewingmalta.com

Image 5 - London - Shard - Courtesy of Film London - Kent Lyons

Image 6 - Malaga - Rodaje Puente de San Luis Rey 2002 © Diario SUR

Image 7 - Sweden - Courtesy of Fredrik Ekblad

Page 61 (from top):

Image 1 - Sandomierz - *Father Matthew* - Courtesy of Municipality in Sandomierz

Image 2 - London - *Ill Manors* - Courtesy of Film London - James Dewar

Image 3 - Lecce - *Mine Vaganti* - Courtesy of Apulia Film Commission

Image 4 - Malaga - Rodaje Puente de San Luis Rey 2002 © Diario SUR

Image 5 - Romania - Courtesy of Castel Film Romania

Image 6 - Malta – St. John's Co Cathedral - Image Credit: Chen Weizhong; © viewingmalta.com

Image 7 - London - London Eye – Courtesy of Film London/Jamie Lumley

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