

The influence of Film and TV locations on visits to the UK

Nation Brands Index 2023

July 2024



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Young man hovering on a broomstick in the Outer Bailey of Alnwick Castle, Alnwick, Northumberland. ©VisitBritain



Summary

A mother and daughter runs in front of Ham House, Richmond, England ©VisitBritain/Herewegoagain

Screen Tourism: Four Key Insights

- 1. Screen tourism is an influential trend amongst both visitors to the UK and those considering a trip to the UK.**
- 2. London demonstrates the largest potential for screen tourism, drawing the most interest amongst UK visitors and considerers. Film and TV, however, still plays a key role in motivating travel outside of London too.**
- 3. Film and TV can play a significant role in driving decisions of potential visitors to come to the UK in the future.**
- 4. Screen tourism is popular amongst all demographics but has more impact amongst younger travellers.**

Screen Tourism Summary

- 1. Screen tourism is an influential trend amongst both visitors to the UK and those considering a trip to the UK.**
 - Amongst UK visitors who have taken a leisure trip in last 10 years, 7 in 10 have visited a film or TV location in the UK, demonstrating a sizable opportunity to leverage.
 - Film and TV locations are of significant interest amongst those considering a leisure trip to the UK; 9 in 10 potential visitors would be interested in visiting a film or TV location in the UK in the future.
- 2. London demonstrates the largest potential for screen tourism although film and TV also plays a key role in motivating travel outside of London.**
 - While film and TV locations exist in an abundance across the UK, the most popular destination for filming sites visited are found in London. 87% of travellers that had visited a film or TV location when in the UK had done so in the capital, with 2 in 3 of them visiting locations in London exclusively. London was also the most popular destination amongst UK considerers, with 3 in 4 likely to visit a location in the capital.
 - Screen tourism is also a key driver in influencing UK leisure visitors' decision to travel outside of London; 1 in 6 of those who have visited the UK for leisure were influenced by a film or TV location to travel outside of London.
- 3. Film and TV can play a significant role in driving decisions of potential visitors to come to the UK in the future.**
 - UK film and TV content can play a significant part in the early stages of trip planning; almost 1 in 4 UK considerers agree visiting film and TV locations would have some level of influence when choosing a UK leisure trip in the future. For 1 in 6 it would be the main reason.
- 4. Screen tourism is popular amongst all demographics but has more impact amongst younger travellers.**
 - The screen tourism trend resonates most strongly amongst the younger demographic. Compared to older travellers (35-54 and 55+ years) those aged between 18-34 have a higher propensity to visit film or TV locations on a leisure trip to the UK. Film and TV locations are also more likely to play an influential part in the decision to visit regions outside of London and to be a motivating factor in the choice to visit the UK in the future.
 - While opportunity does exist amongst the older generations, the extent of the screen tourism impact diminishes as age increases.



Background, context and methodology

Background and context

Screen tourism is the business of attracting visitors to a destination based on showcasing locations and experiences featured in film and TV shows. Screen tourism has been emerging global trend over recent years with previous VB research demonstrating the potential to motivate and inspire travel to the UK.

VisitBritain's research shows that film and TV programme filming locations are powerful motivators for travel with **43% of International travellers globally having a strong interest in visiting a literary, music, film and TV location** on their next leisure trip.

Film and TV programmes/series have also become major influencers of travel plans, with **screen tourism influencing 1 in 4 global travellers' choice in holiday destinations**; and an even stronger source of inspiration for trips to Britain compared to destinations elsewhere.

In response to this trend, VisitBritain has increasingly incorporated UK TV & Film content into its global offering, including the launch of its flagship global marketing campaign 'Starring Great Britain' in early 2025.

The following analysis explores the role of film and TV in previous and future UK trip planning and its influence on visits to regions outside of London.



Food truck at a festival at Highclere Castle with house behind ©VisitBritain/ Anastasia Ustenikova

Methodology

The Anholt-Ipsos Nation Brands Index (or NBI) is an annual study amongst 60,000 consumers in 20 panel countries around the world.

Respondents score 60 nations (including the UK) on a raft of attributes including some relating to tourism, culture and welcome as well as those relating to exports, governance and immigration / investment.

Fieldwork took place from June-August 2023 and was conducted in each market at the same time. Respondents are representative of the online population in each market and will not be a true reflection of the total traveller audience in each panel market. The 20 panel countries included in this analysis are: **Argentina, Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, Saudi Arabi, South Africa, South Korea, Spain, Sweden, Turkey & USA.**

International surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indians and Chinese tend to be very positive in their answers compared to European markets. It is advised to take account of this cultural factors in cross-market analysis, particularly between long-haul and short-haul results.

See slides 48-49 for full list of audience definitions and panel/nation markets. Access our full NBI rankings report [on our website](#).



Red phone box with tree blossom behind. London, England.
©VisitBritain/Bei Na

Sponsored Questions

Each year, VisitBritain sponsors additional questions on the survey and for 2023, film and TV programme/series locations and their role within inbound visits to the UK were selected as the key theme.

VisitBritain included 6 key questions exploring visitation, impact and influence of UK film and TV locations amongst respondents who have visited the UK in the last 10 years or would consider doing so in the future. The questions forming the basis of the analysis include:

Have you visited the UK for **leisure** in the past 10 years?

Amongst previous UK visitors:

- Did you **visit a location(s)** seen in a film or TV programme/series **whilst on holiday/vacation in the UK?**
- **Where was the location(s)** from a film or TV programme/series you visited whilst on holiday/vacation?

If filming location visited was based outside of London, respondents were asked:

- **To what extent** did the film or TV programme/series location **influence** your decision to visit a region outside of London?

Amongst UK considerers:

- **Would you be interested in visiting a location(s)** seen in a film or TV programme/series in the UK?
- **To what extent** would a film or TV programme/series location be the **reason for you choosing** to take a trip to the UK?

Please note that the locations of the film and TV filming sites are based on the respondent's opinion and may not be a true reflection of their exact location.



UK leisure visitors and considerers

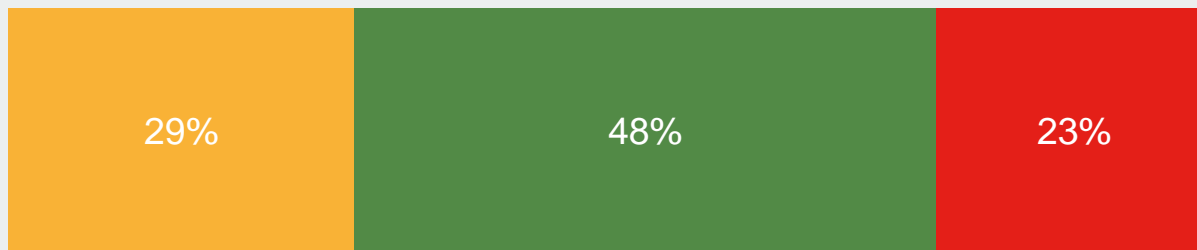
Visitors, considerers and rejectors of the UK

77%

of panel respondents were either previous visitors or considerers of the UK

All NBI survey respondents are representative of the online population in each panel market and are not necessarily international travellers. To capture the most relevant insights, VB screened out almost a quarter (23%) of NBI respondents for this analysis; those not interested in visiting Britain in the future.

Have you visited the UK for leisure in the past 10 years?



UK VISITORS

UK CONSIDERERS

REJECTORS

- Yes, I have previously visited
- No, but I am interested in visiting the UK for leisure in the future
- No and I am not interested in visiting the UK for leisure in the future

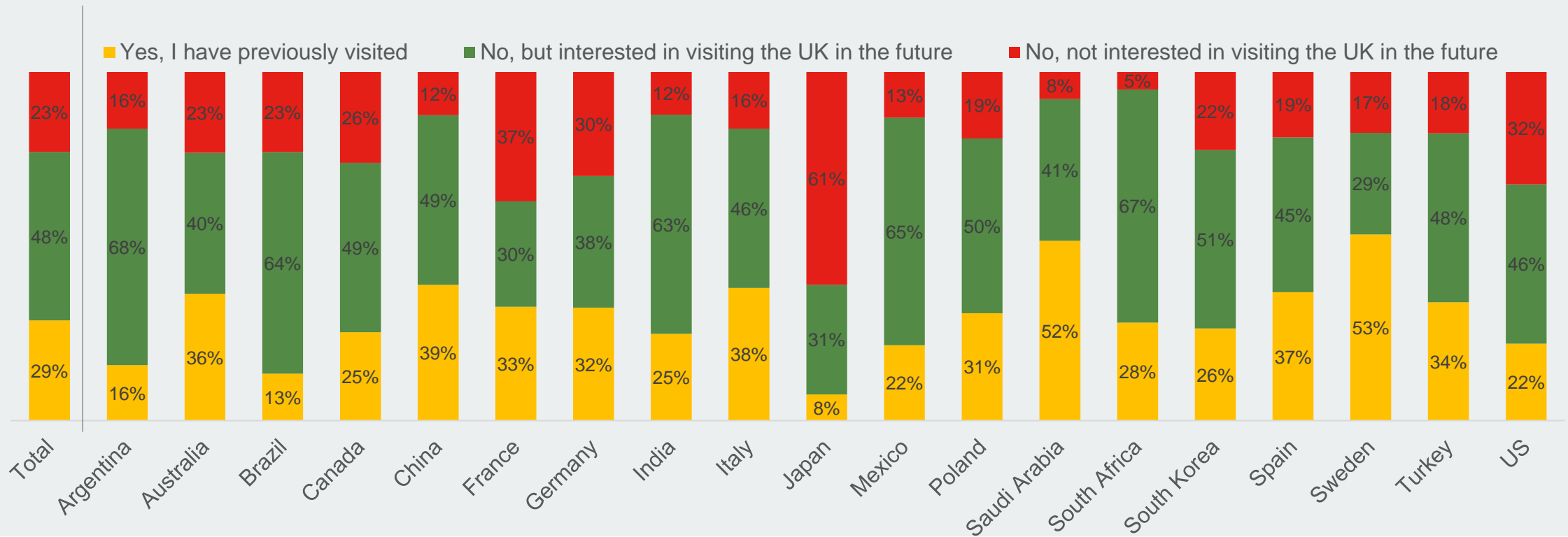
Over 3 in 4 (77%) of respondents have either travelled to the UK for leisure purposes or would consider doing so in the future. 29% of respondents from across the 20 panel markets have visited the UK for leisure in the last 10 years; while almost half would consider doing so in the future.

Demographics: Respondents within the youngest demographic (aged 18-34) showed the highest levels of visitation the UK, with the strongest future interest to visit the UK (55%). Propensity to visit and future interest in the UK declines as age increases with less than 40% of respondents aged 55+ considering a leisure trip to the UK in the future.

Visitors, considerers and rejectors by market

While the majority of respondents at a total level were either interested in, or had visited the UK for a leisure trip, this varied considerably by market. The nations with the highest proportion of non-rejectors of the UK included long haul markets South Africa, Saudi Arabia, India and China.

Have you visited the UK for leisure in the past 10 years?





Influence of film and TV locations on previous leisure visits to the UK

UK Visitors - question mapping

Have you visited the UK for leisure in the past 10 years?

Defined as 'UK Visitors'

Yes
29%

No, but interested
48%

No and not interested
23%

Did you visit a location(s) seen in a film or TV programme/series whilst on holiday/vacation in the UK?

30% No

70% Yes

Defined as 'UK screen tourists'

Where was the location(s) from a film or TV programme/series you visited whilst on holiday?

In London
68%

Region outside of London
13%

Both in London and another region outside London
18%

To what extent did the film or TV programme/series location influence your decision to visit a region outside of London?

It was the main reason
34%

It had some influence
39%

It had no influence
27%

Source: Anholt-Ipsos Nation Brands Index 2023



Propensity to visit film and TV locations on UK leisure trips

UK previous visitors

Propensity to visit film and TV locations on UK leisure trips



7 in 10

have visited a film or TV programme/series location while on a leisure trip to the UK



Food truck at a festival at Highclere Castle with house behind ©VisitBritain/ Anastasia Ustenikova

Propensity to visit film and TV locations on UK leisure trips



7 in 10 have visited a film or TV programme/series location in the UK and are defined as a **UK screen tourist**



Slightly more likely to be male than female



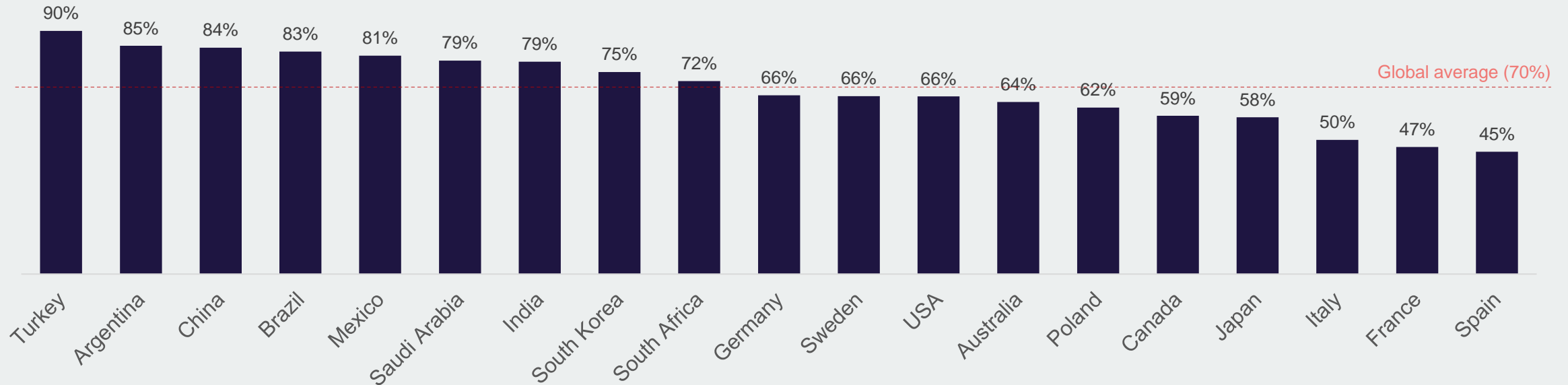
Significantly more popular amongst the younger traveller

Overall, film and TV locations are of interest to the majority of inbound visitors to the UK. Amongst those that have taken a leisure trip to the UK in last 10 years, 70% have visited a film or TV programme/series location in the UK.

Screen tourists in the UK skew slightly more towards being male (71%) than female (68%) and the trend is significantly more popular amongst the younger demographic. Propensity to visit film/TV locations on a leisure trip to the UK declines with age; over 3 in 4 (77%) 18–34-year-olds have visited a film/TV location while on holiday in the UK, compared to just over two-thirds (67%) of those aged 55 and over. Despite interest for screen tourism in the UK reducing with age, with 2 in 3 over 55 year old visitors interested, this attraction category presents huge opportunity to leverage across the industry.

Propensity to visit film and TV locations on UK leisure trips by market

Yes - I visited a location(s) seen in a film or TV programme/series whilst on holiday in the UK

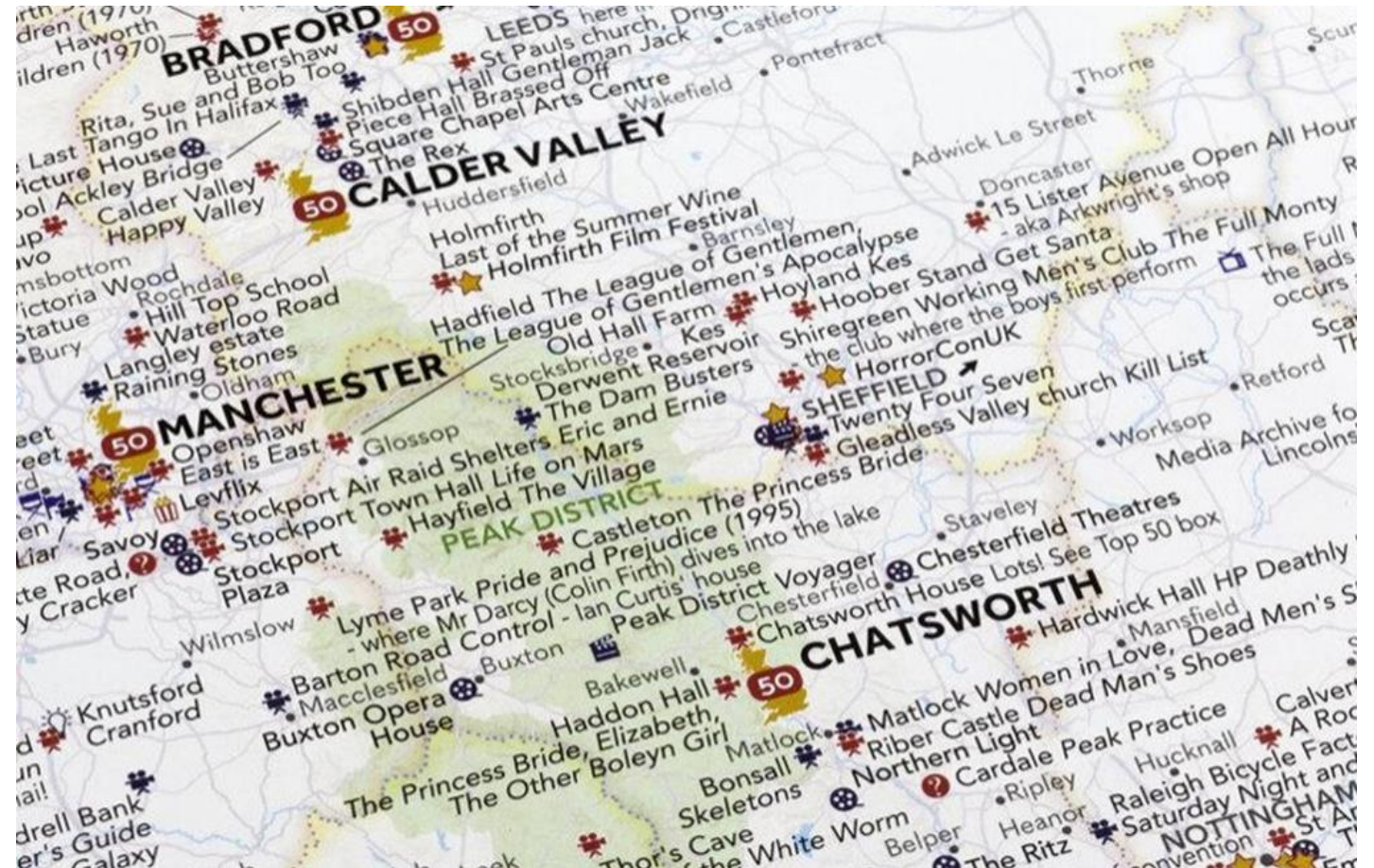


Key long-haul markets such as **China**, **Brazil**, **Saudi Arabia** and **India** were significantly more likely to have visited a film or TV location, while key European markets **Spain**, **France** and **Italy** and longer-haul travellers from **Canada** and **Japan** were less likely to have visited.

Additional travellers of interest; Americans, Australians and Germans are marginally less likely than the global average to have visited a UK film or TV programme/series location while on a leisure break, however this still equates to a sizable proportion of around 2 in 3 visitors.

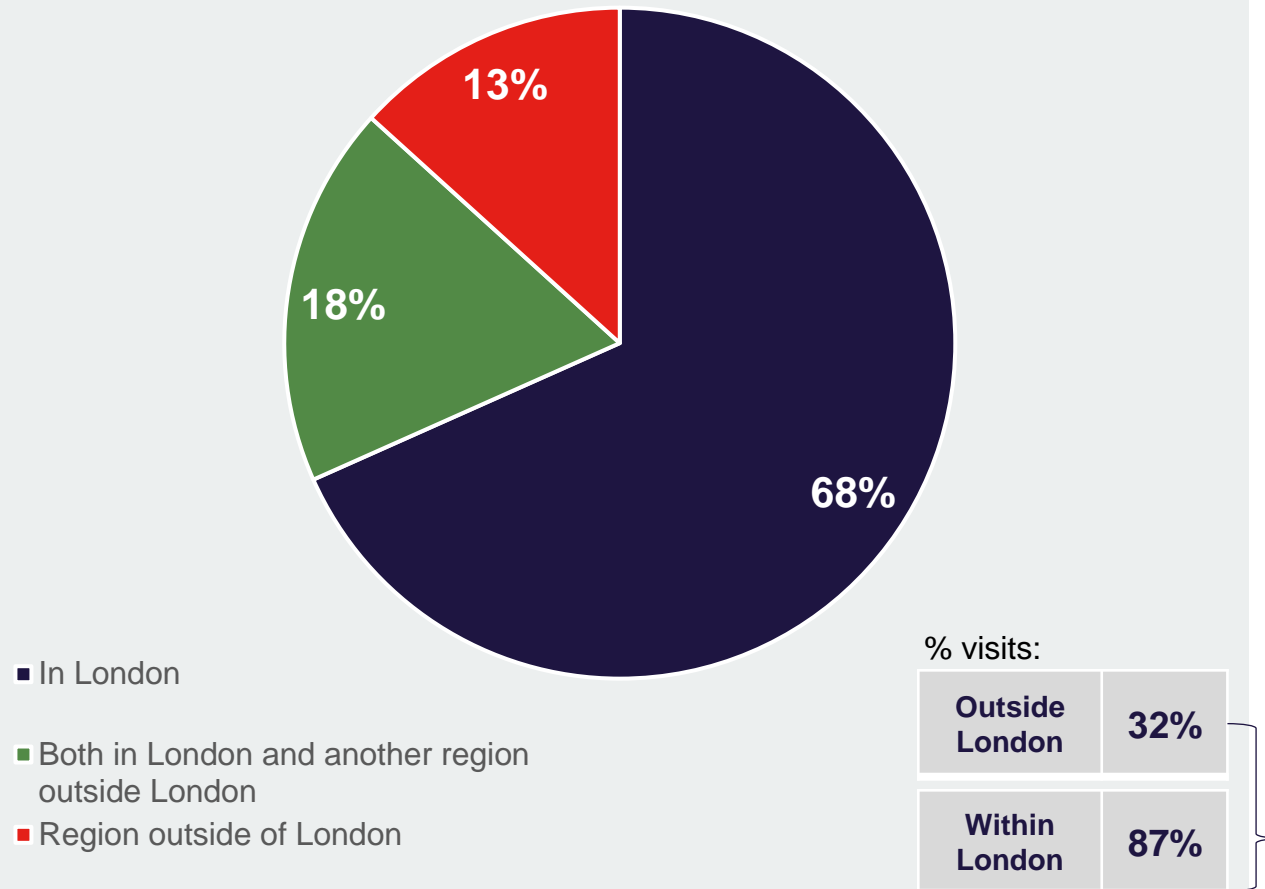
Film and TV programme or series locations around the UK

The UK is one of the most popular destinations for the filming of movies or TV programmes in the world, offering a huge selection of iconic spots for film or screen tourists distributed widely across all four nations. Research by Kuoni ranked the UK second only behind the US for league table on most popular countries in the world for filming locations.



Regional spread of film and TV locations visited on UK leisure trips

Location of film and TV sites visited in the UK



While iconic film and TV locations exist in an abundance across all four corners of the UK, the most popular destination visited for filming sites were found in London.

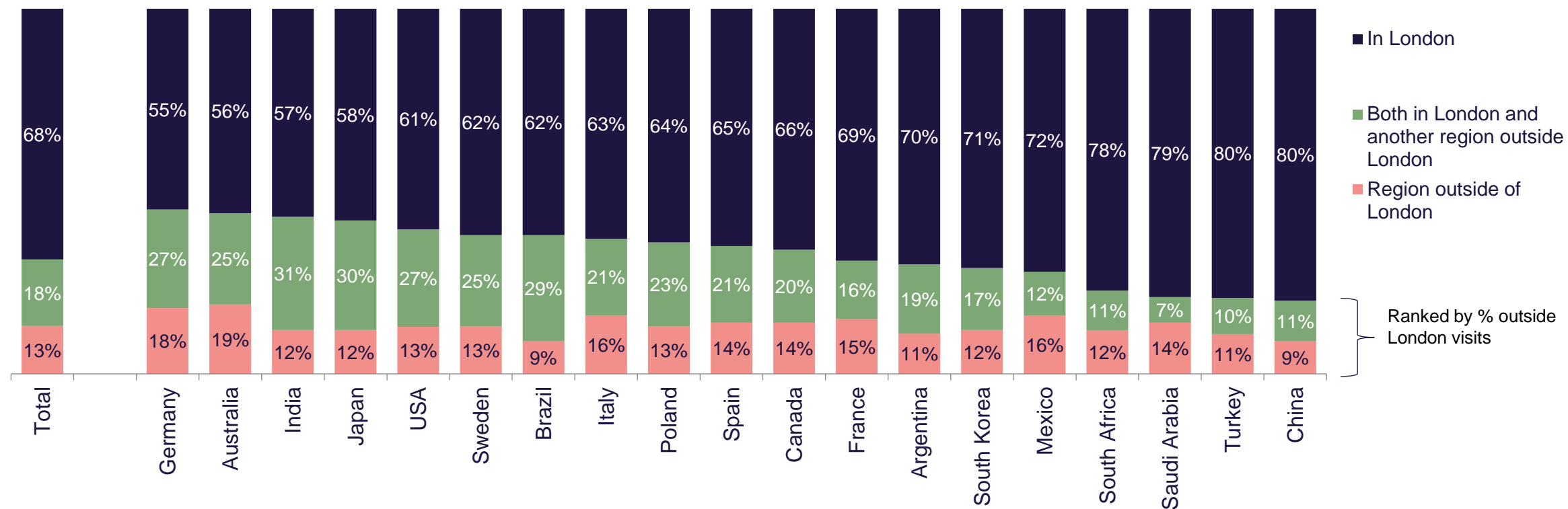
87% of travellers that had visited a TV/film location when in the UK, had done so in the capital, with 2 in 3 of them visiting locations in London exclusively. The London skew is likely to be driven by the high propensity of visitors to spend time in London on their trip, with 70% of UK inbound visitors spending time in London on average over the last 10 years*. The city also has the highest concentration of film/TV locations in the UK providing huge choice around the capital**.

Visiting film and TV programme locations outside of London was still popular for almost 1 in 3 screen tourists (*UK screen tourists) while 13% of respondents globally had visited a filming site located exclusively outside of London during a leisure trip to the UK in the last 10 years.

Outside and Within London categories reflects those that selected a combination of the responses to the question

Regional spread of film and TV locations visited by market

UK screen tourists: film and TV locations visited by region



% visits:

Outside London	32%	45%	44%	43%	42%	39%	38%	38%	37%	36%	35%	34%	31%	30%	29%	28%	22%	21%	20%	20%
Within London	87%	82%	81%	88%	88%	87%	87%	91%	84%	87%	86%	86%	84%	89%	88%	84%	88%	86%	89%	91%

Source: Anholt-Ipsos Nation Brands Index 2023. Q3: Where was the location(s) from a film or TV programme/series you visited whilst on holiday? Base: *UK visitors who have previously visited a film/TV location on a leisure trip in the last 10 years.



Regional spread of film and TV locations visited by market

London is by far the most popular destination for each of the 20 panel markets for visiting film and TV locations. While there are some variations across global regions, at least 8 in 10 screen tourists visited London based filming locations in each market.

Amongst travellers that have visited a film or TV site, it's the long-haul markets that tend to over-index for London most strongly. 91% to 89% of screen tourists from **China, Brazil, Turkey and Argentina** have visited filming sites in the city, the largest proportion of all the panel markets. Inbound travellers from **India, Japan and South Korea** also hold a stronger interest, with 88% visiting London film sites. Those from **USA, Sweden and Poland** are on par with the average (86% to 87%) while **Germany, Australia and India** have the lowest propensity.

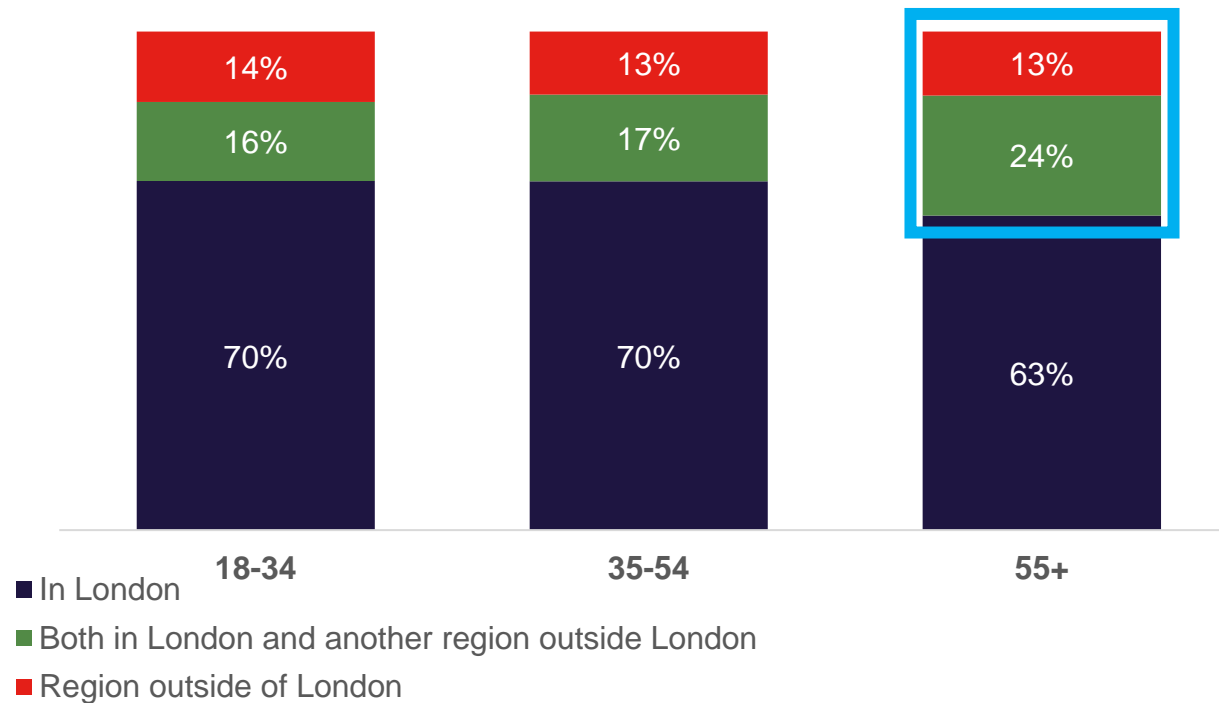
The extent to which UK screen tourists explore the UK to visit film or TV programme/series locations varies considerably by market. UK Screen tourists* from **Germany, Australia, India and Japan** have the highest propensity to visit a film or TV screening location outside of London, all over-indexing against the total by a significant 10 pts or above. According to the International Passenger Survey, German and Australian travellers rank amongst the top markets for nights spent outside of London during trips to the UK* and therefore are already more likely than the average inbound traveller to explore outside of London.

Travellers from source markets within the Americas region (**USA, Canada and Brazil**) are also more likely to visit screen sites outside of London, as are short-haul markets **Sweden, Italy, Poland and Spain**.

Screen tourists from **China, Turkey, Saudi Arabia and South Africa** are conversely less likely to explore other areas of the UK for seen-on-screen locations. With around 1 in 5 visiting a film or TV site outside of London, these markets have the weakest regional dispersion of all 20 panel markets.

Regional spread of film and TV locations visited by age and gender

Location of film and TV programme location visited by age of international leisure traveller



NET region
outside of
London

30%

30%

37%

The propensity to visit a film or TV location in London vs elsewhere in the UK is similar amongst travellers aged 18-35 and 35-54. Almost 1 in 3 (30%) of all 18-54 year olds that had visited a UK film/TV site outside of London during a trip to the UK.

Over 55+ year old travellers are on the whole less likely to have visited a film or TV set on a leisure visit to the UK. However if they have in the last 10 years, findings suggest they travel outside of London more often to do so.

By gender, females are slightly more likely to visit outside of London while males skew towards London.



Whist on a leisure trip to the UK:
**Influence of film and TV locations on visiting a
region outside of London**

The Power of Screen Tourism

Film and TV is a key driver in influencing UK leisure visitors' decision to travel outside of London

1 in 6

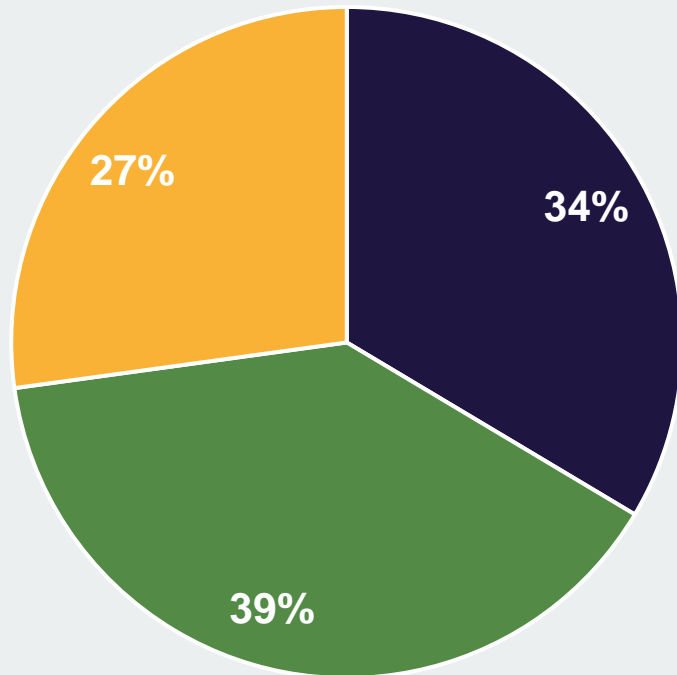
Of those that have visited the UK for leisure
were influenced by a film or TV
location to travel outside of London



Dudley, West Midlands, England © The Black Country Living Museum

Influence of film and TV locations on visiting a region outside of London whilst on a leisure trip to the UK

To what extent did the film or TV location influence your decision to visit a region outside of London?



Net positive
Influence: **73%**

- Main reason
- Some influence
- No influence

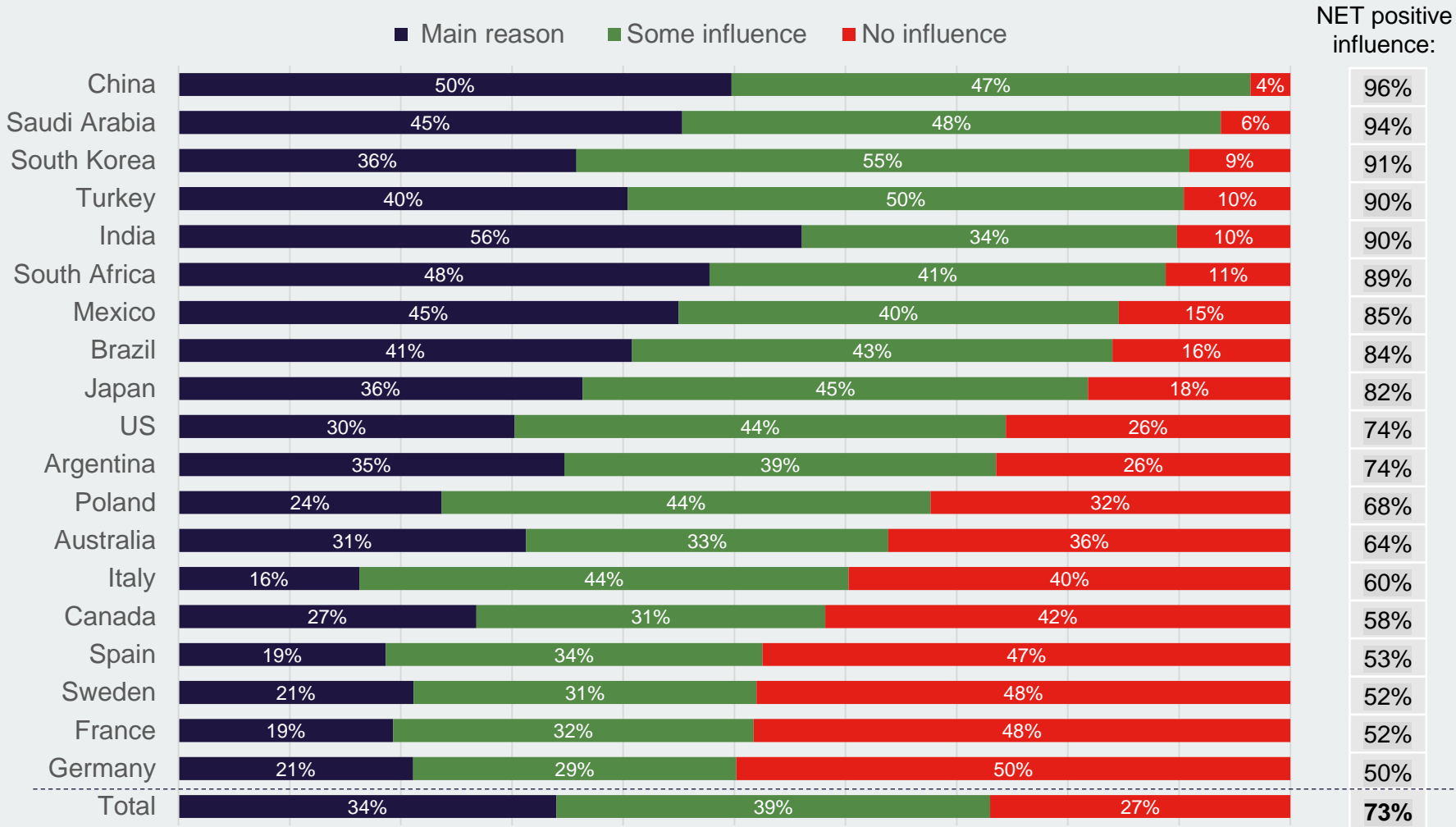
Film and TV locations play a significant role in influencing the decision to travel outside of London when on a leisure trip to the UK.

Of those that visited a film or TV location outside of London, 73% agree that film and TV sites has at least some positive impact on their decision to travel regionally across the UK.

For a third (34%) the seen-on-screen locations were the main influencing factor in visiting destinations outside of London, indicating that British film and TV content can play a significant part in the early stages of research and planning.

Which markets are most strongly influenced?

To what extent did the film or TV location influence your decision to visit a region outside of London?



Overall, film & TV locations have a stronger influencing factor amongst long haul markets, however even across short-haul markets screen tourism was a key motivator for visiting a region outside of London, with around 1 in 5. The exception being Italy with strong influence dropping to a low of 16%.

The **Chinese** market are most likely to be influenced to travel outside of London to visit film location with 96% agreeing it had at least some influence in the decision to travel across the UK. While **Germans** have the highest propensity to have visited a film/TV location outside of London, research suggests screen tourism does not play a significant role in influencing the decision to leave the capital. 1 in 2 agreed screen tourism had no influence in travelling regionally, highest proportion of all panel markets.

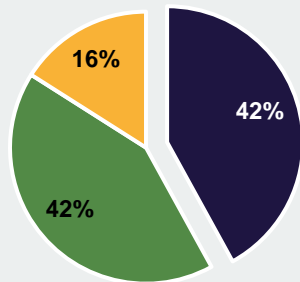
Source: Anholt-Ipsos Nation Brands Index 2023. Q3b: To what extent did the film or TV programme/series location influence your decision to visit a region outside of London? Base: UK visitors who have previously visited a film/TV location outside of London. n= 3,667



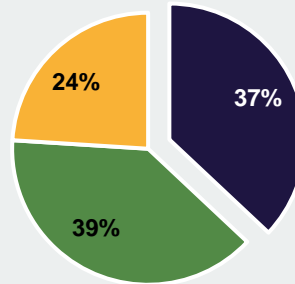
Which demographic are most strongly influenced?

To what extent did the film or TV location influence your decision to visit a region outside of London?

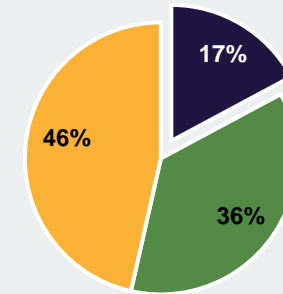
UK Screen Tourists: **aged 18-34**



UK Screen Tourists: **aged 35-54**



UK Screen Tourists: **aged 55+**



■ Main reason ■ Some influence ■ No influence

NET positive influence: **84%** **76%** **54%**

Film and TV locations are a key driver of destination choice across all age groups. The extent at which a film or TV location influence the decision to travel outside of London however is heavily impacted by demographics, with its influence diminishing as age increases. Official inbound data from the International Passenger Survey indicated that in general, younger travellers are less likely to visit areas outside of London. Screen tourism is therefore an important way to entice these travellers to explore the regions of Britain.

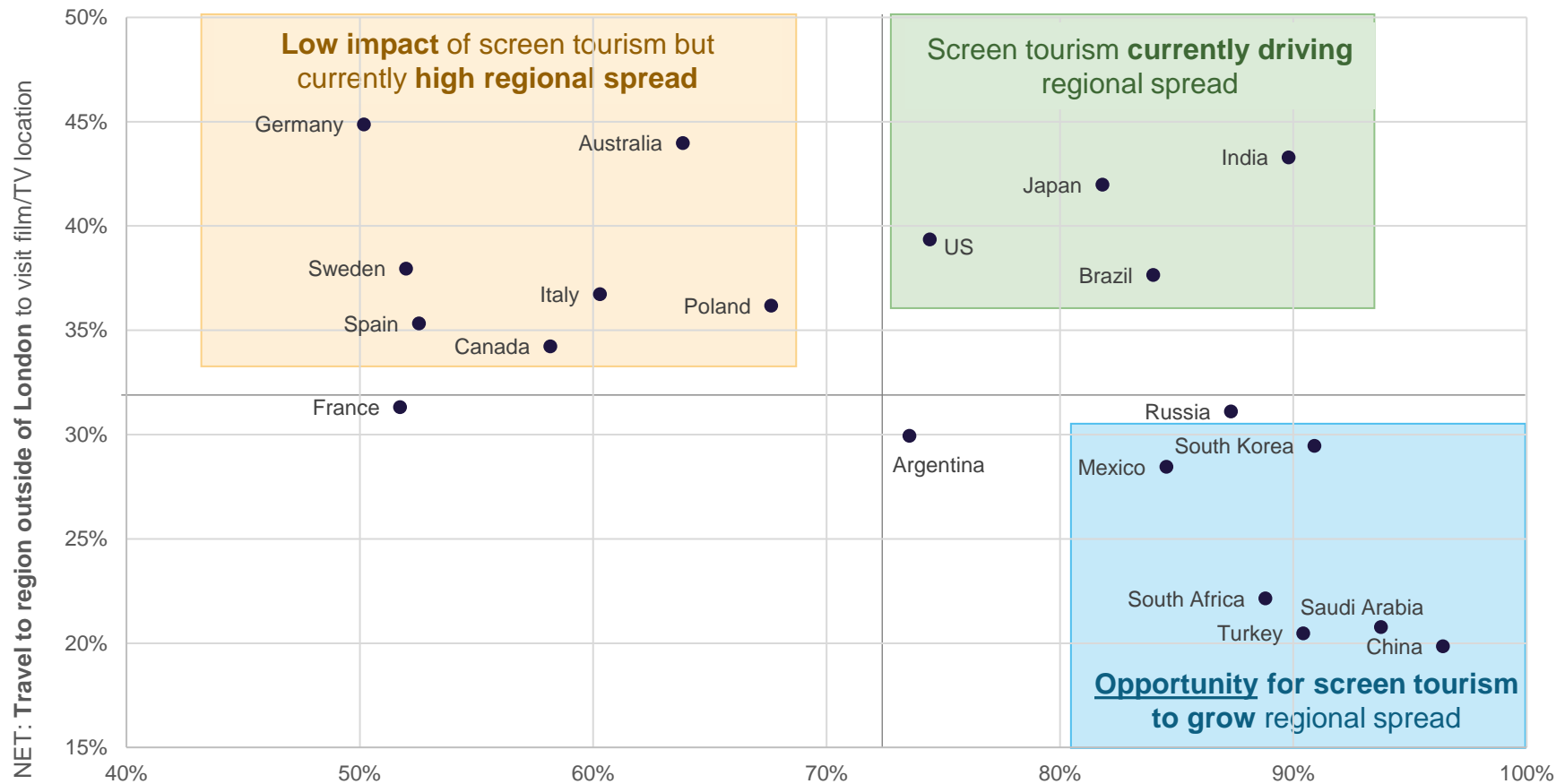
Visiting film and TV locations plays a significant role in trip planning amongst 18-34 year olds. 84% claim screen tourism played some part in the decision to visit destinations outside of London, declining to 76% amongst 35-54 years and reaching a low of 54% for those over 55 years. Amongst UK visitors that claim screen tourist was the main reason to visit a region outside the capital, the impact across the ages ranges even more significantly. For 42% of 18-35 year olds, film or TV location was the main influencing factor, impact drops 25 pts to 17% amongst those aged 55 and over.

Source: Anholt-Ipsos Nation Brands Index 2023. Q3b: To what extent did the film or TV programme/series location influence your decision to visit a region outside of London? Base: UK visitors who have previously visited a film/TV location outside of London. n= 3,667 *International Passenger Survey, 2023



Identifying the biggest opportunity to use screen tourism to drive regional dispersion

Identifying Markets of Opportunity for Film/TV Influence



Plotting **propensity to travel** outside of London when visiting a film/TV location against the **influence film/tv locations have on the decision to travel regionally in the UK** allows us to demonstrate where the potential opportunity markets are.

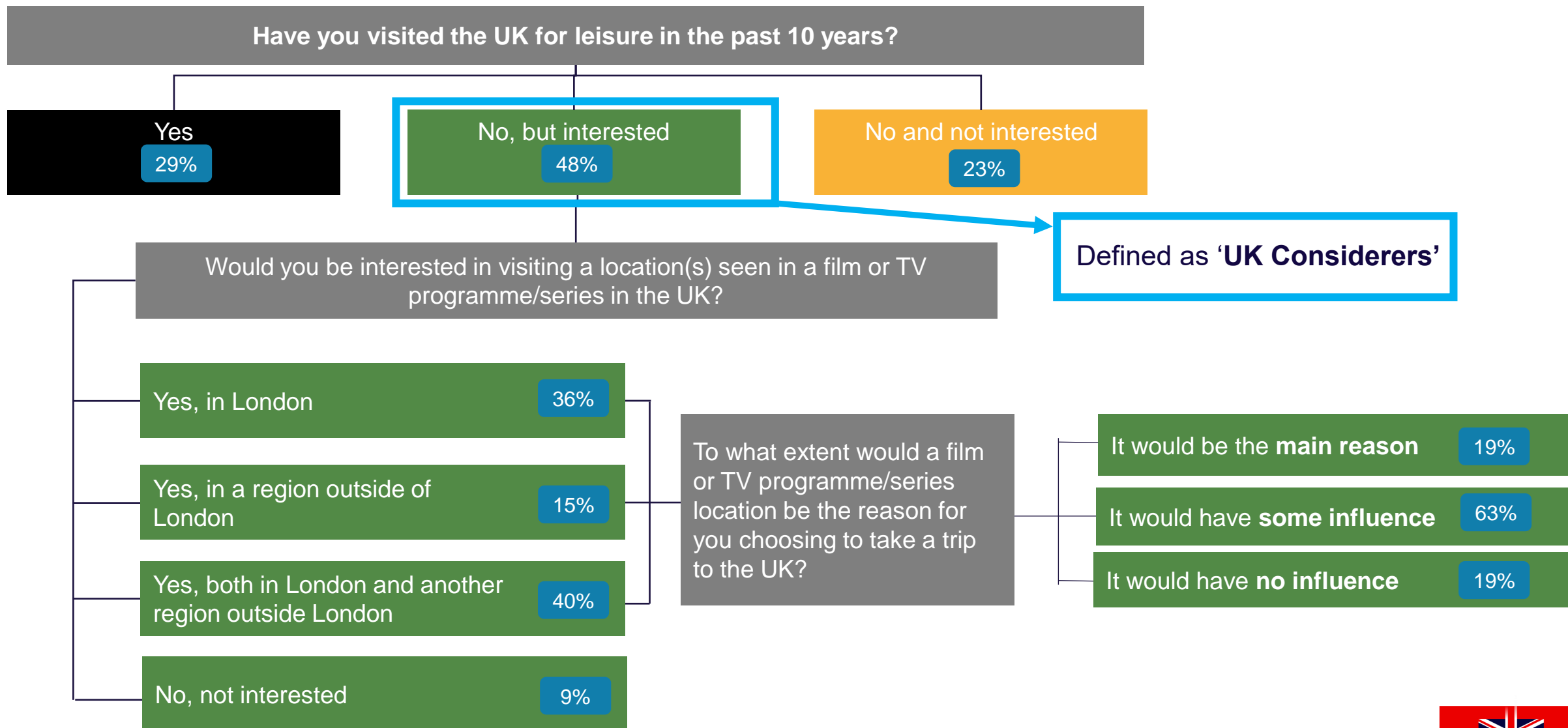
India, Brazil, Japan and **US** are more likely to travel outside of London when visiting a TV/film location AND the location of the film/TV site played a significant part in the decision to travel outside the capital.

UK screen tourists from **China, Saudi Arabia** and **South Korea** have huge potential to influence regional dispersion with film/TV product located around the UK. They under-index for travelling regionally but when they do, film/tv locations are a driving factor for the trip.



**Influence of
Film and TV
locations on
consideration
to visit the UK**

UK Considerers - question mapping



Whilst considering a UK leisure trip in the future:
Interest in visiting UK film and TV locations

Interest in visiting UK film and TV locations in the future

Film and TV locations are of significant interest amongst those considering a leisure trip to the UK



9 in 10

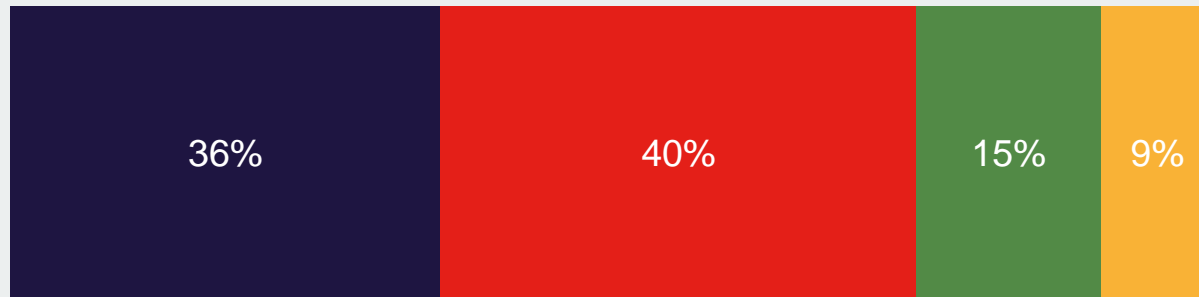
potential visitors would be interested in
visiting a film or TV location in the UK



Young man hovering on a broomstick in the Outer Bailey of Alnwick Castle, Alnwick, Northumberland. ©VisitBritain

Interest in visiting UK film and TV locations in the future

Would you be interested in visiting a location(s) seen in a film or TV programme/series in the UK?



- Yes, interested in London
- Yes, both London and a region outside of London
- Yes, in a region outside of London
- No, not interested

% positive interest

NET+ interest	91%
Within London	75%
Outside London	55%

Almost half (48%) of respondents across NBI's 20 panel markets have not yet visited the UK for leisure but would be interested in doing so in the future, these respondents are classed as 'UK Considerers' (see slide 11).

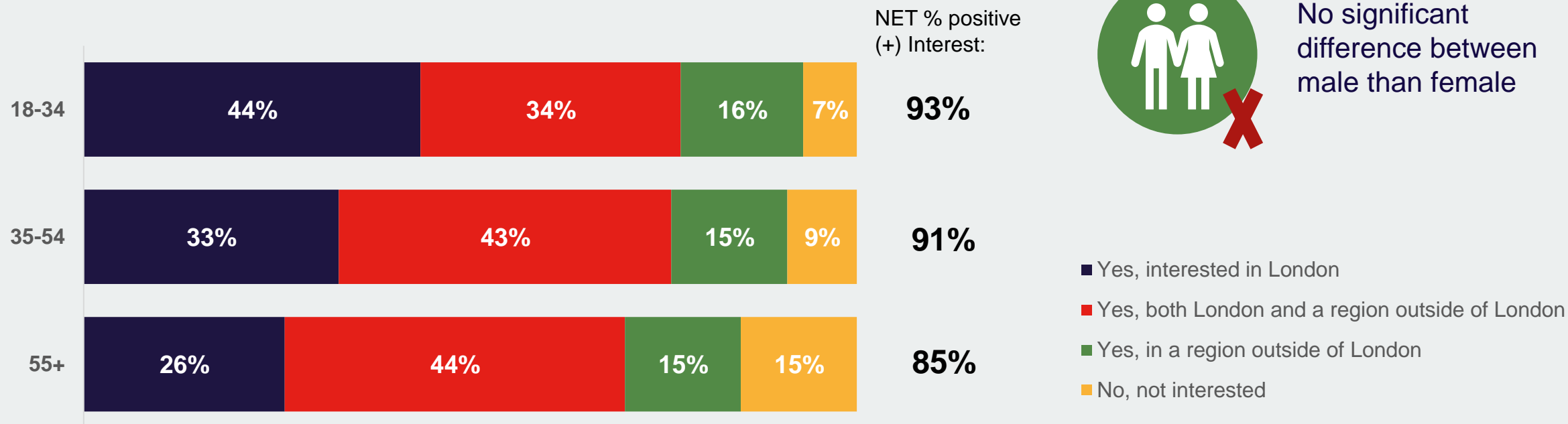
Amongst these UK considerers, visiting a film or TV programme/series location was of significant interest; over 9 in 10 would be interested in visiting a seen-on-screen location within London or across another region of the UK.

London was the most popular destination for visiting film locations with 3 in 4 UK considerers likely to visit a filming location in the capital. Over a third of potential visitors (36%) are keen to visit locations used in filming and TV exclusively in London.

For 15% of UK considerers, visiting a filming location exclusively outside of London would be a preference, demonstrating that screen tourism does have a powerful influence in driving regional spread amongst a core subset/slice of the audience. In contrast, findings suggest that 1 in 10 UK considerers are not interested at all in visiting a location seen in a film or TV programme/series in the UK.

Interest in visiting UK film and TV locations in the future by age and gender

Would you be interested in visiting a location(s) seen in a film or TV programme/series in the UK?

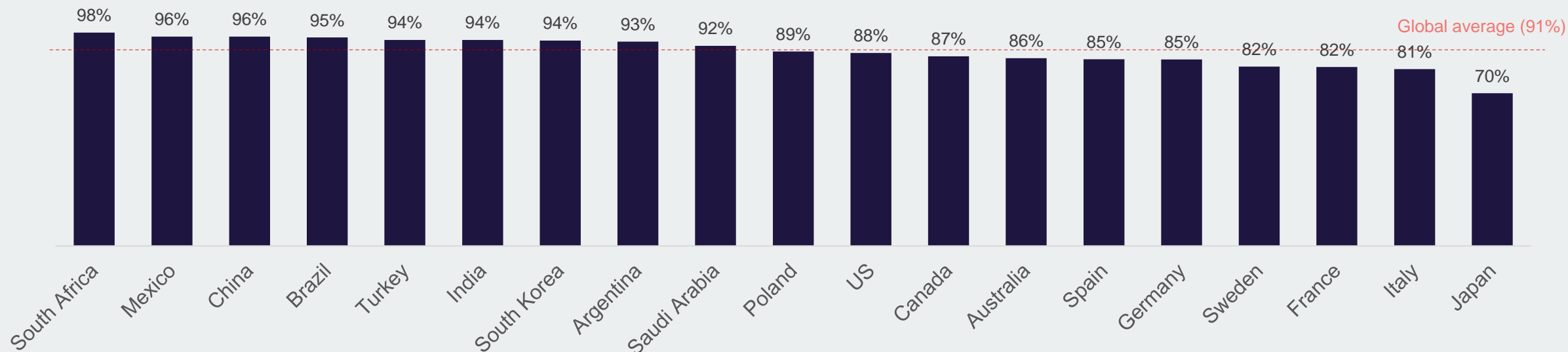


Interest in visiting a film and TV location in the UK is high across all demographics, however the level of interest begins to taper off as age increases. Amongst 18-34 year olds, interest peaks with 93% keen on visiting a filming location in the UK, falling by 8pts to 85% amongst those over 55+. For all age groups, London is the preference vs outside the capital when it comes to locations of UK film and TV sets.

At a broad level there is no variation when comparing film/TV location interest amongst male and female UK considerers.

Interest in visiting UK film and TV locations in the future by market

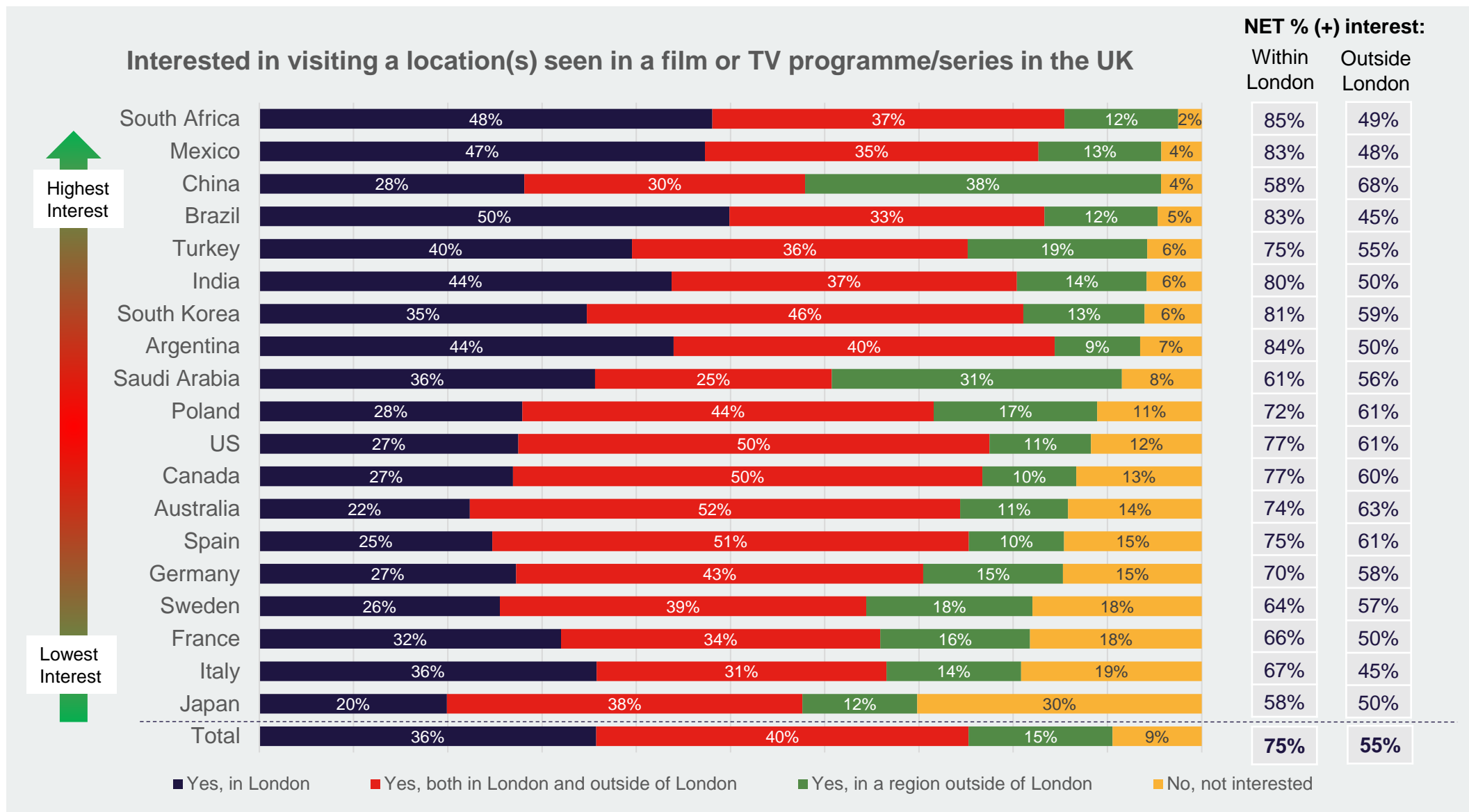
Yes - interested in visiting a location(s) seen in a film or TV programme/series in the UK



With interest in screen tourism on future UK trips hitting a global average of 91%, there is a small variation of interest in visiting UK film or TV locations across the 20 panel markets.

Key long haul markets **China** (96%), **Brazil** (95%) and **India** (94%) all over-index for interest in film and TV locations when visiting the UK in the future. Conversely Japan ranks lowest for interest followed by our European neighbours; **Italy** (81%), **France** (82%), **Sweden** (82%), **Germany** (85%) and **Spain** (85%).

Interest in visiting UK film and TV locations in the future by market



Source: Anholt-Ipsos Nation Brands Index 2023. Q4: Would you be interested in visiting a location(s) seen in a film or TV programme/series in the UK? Base: UK Considerers



Interest in visiting UK film and TV locations in the future by market

When compared to regions outside the capital, London elicits the strongest interest for visiting film and TV sets on a future UK leisure trip, although there is a significant variation amongst markets. **South African** (85%), **Argentinian** (84%), **Mexican** and **Brazilian** (both 83%) travellers have the strongest propensity to explore London for film and TV filming locations when on a future leisure trip to the UK.

Conversely, UK considerers from **China** are the only nation out of twenty to be more interested in visiting areas outside of London (68%) than within it (58%). They also have over double the interest in exclusively travelling outside of the capital to visit filming location, highlighting the strong potential for screen tourism to influence greater regional dispersion with UK film and TV content. For future leisure travel to the UK, **Saudi Arabia** was another key traveller audience that demonstrates strong contrast between travelling in London vs elsewhere for screen tourism. They show a relatively low interest in exploring film/TV sets within London (61% vs average of 75%) vs elsewhere across the country (31% vs average of 15%).

With regards UK considerers from key European markets; **France** and **Italy** under-index for interest in visiting film/tv locations across both London and elsewhere across the country on future trips. **Sweden** and **Germany** have a more positive sentiment towards future screen tourism in areas outside London (when compared to the average), while **Spain** demonstrates the most positive propensity for both screen tourism in London (on par with average, 75%) and outside of the capital (61%).

UK considerers from **Japan** are the least likely to be interested in visiting the locations of famous UK film and TV sites, ranking lowest for both visiting within London (58%), exploring exclusively outside the region of London (12%) and also scored highest for having no interest at all (30%).

Impact of film or TV locations on decision to visit UK in the future

Influence of film and TV locations on decision to visit the UK in the future

Almost

1 in 4

UK Considerers agree visiting Film/TV locations has **some level of influence** when choosing a UK leisure trip in the future

17%

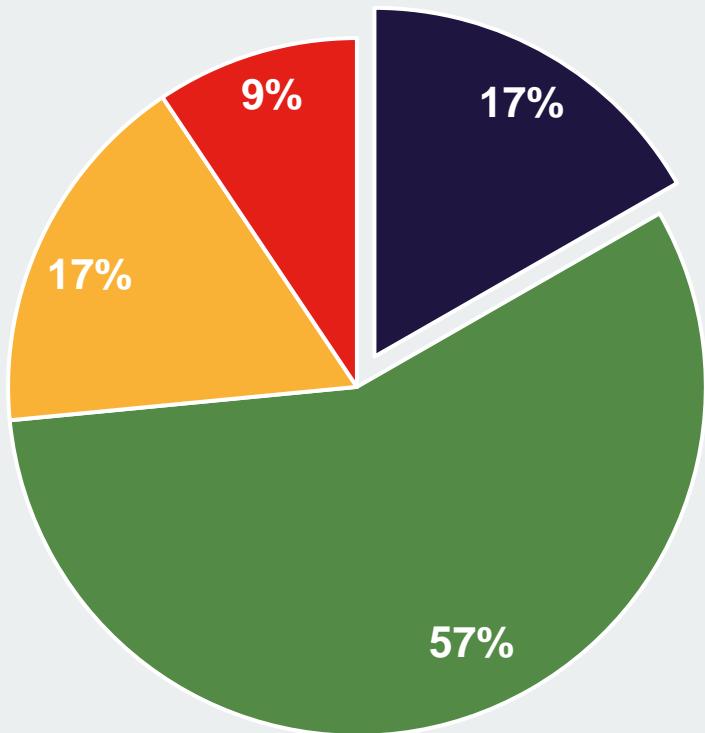
of UK considerers agree it would be the **primary reason** for UK choice



Family walking in front of Cardiff Castle, Cardiff, Wales ©VisitBritain/Rama Knight

Influence of film and TV locations on decision to visit the UK in the future

Influence of screen tourism on decision to visit the UK



- Main reason
- Some influence
- No influence
- I'm not interested in visiting film/tv locations

Net positive
Influence: **73%**

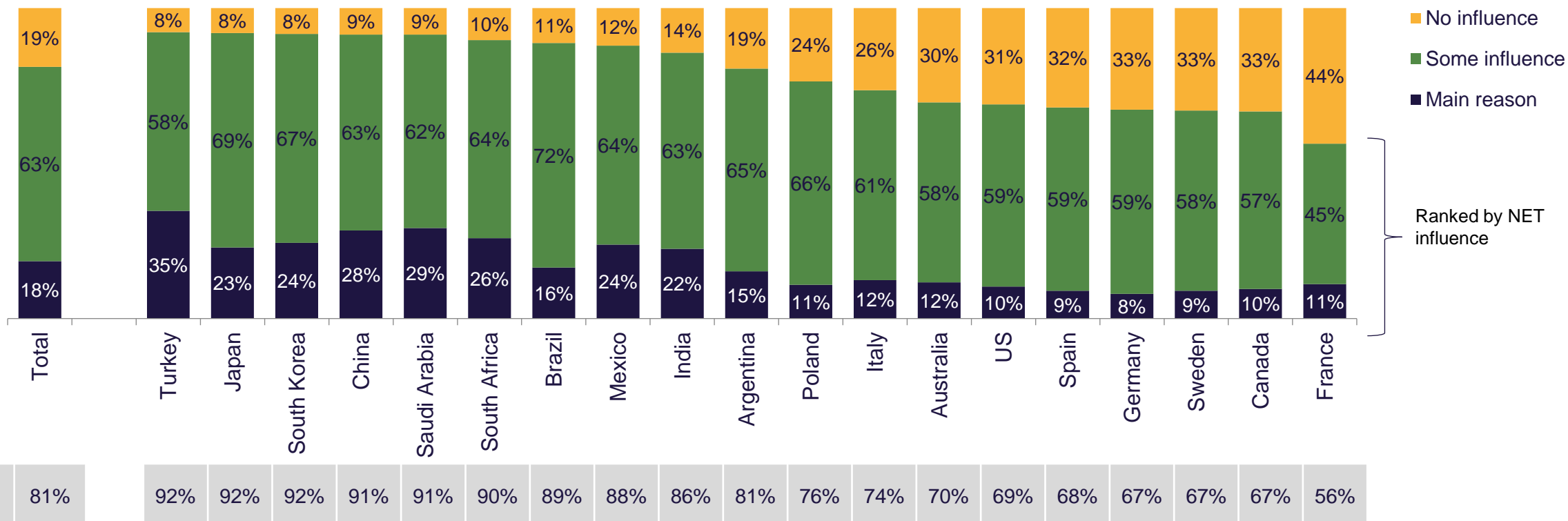
Screen tourism plays a significant role in the decision to visit the UK for leisure in the future, with almost 1 in 4 UK considerers saying that screen tourism inspires their destination decision to come to the UK.

Amongst travellers that had not visited the UK, but would be interested in doing so, 1 in 6 or 17% said visiting a film or TV location would be the main reason for choosing to come to the UK. A further 3 in 5 (57%) said visiting film or TV locations would have some influence on the decision to visit the UK in the future.

While this specific question is a hypothetical one, measuring potential not actual behaviour, its results still give a valuable steer as to the importance and power of screen tourism overall.

Impact of screen tourism on future travel to the UK by market

Amongst those interested in screen tourism in the UK: To what extent would a film or tv programme/series location be the reason for you choosing to take a trip to the UK?



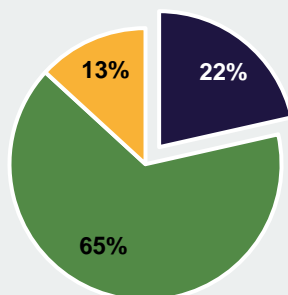
The largest opportunity markets for influencing future UK leisure trips with screen tourism sits primarily within the EMA region. Those from **Saudi Arabia, China, South Korea**, as well as **Turkey, Mexico** and **India** all over-index. While the **Japanese** are the least likely potential visitors to visit the UK for film and TV locations, amongst those that are interested in doing so, screen tourism has one of the largest impact on destination choice.



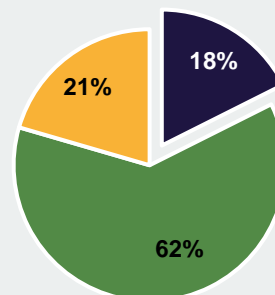
Which traveller groups are most strongly influenced by screen tourism?

Amongst those interested in screen tourism in the UK: *To what extent would a film or tv programme/series location be the reason for you choosing to take a trip to the UK?*

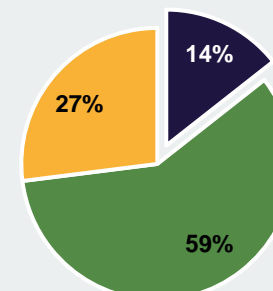
Travellers aged 18-34



Travellers aged 35-54



Travellers aged 55+



■ Main reason ■ Some influence ■ No influence

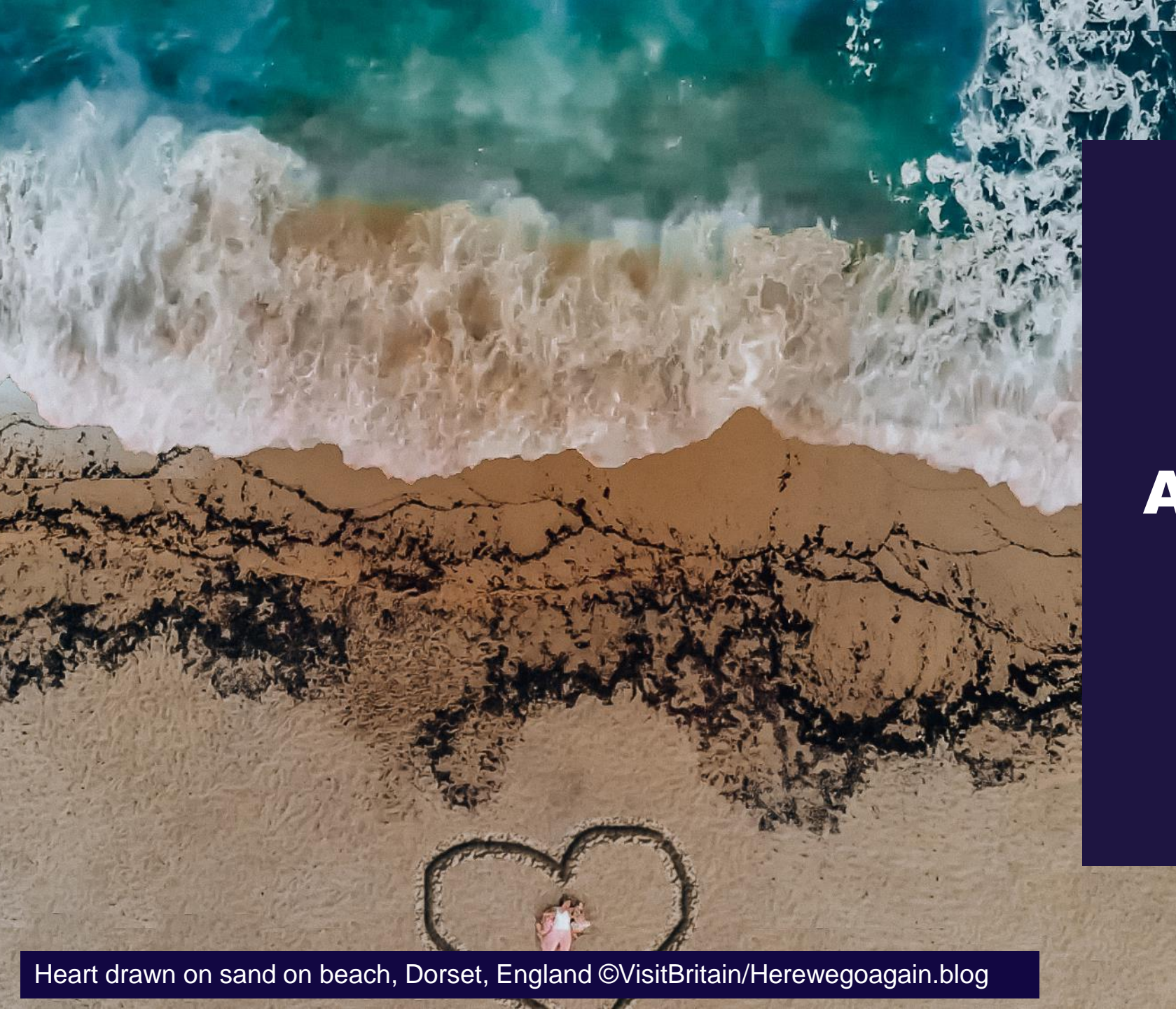
NET positive influence:

87%

79%

73%

Screen tourism is key driver of destination choice across all age groups; however the extent of the impact is shown to reduce with age. Amongst UK considerers that are interested in visiting film and TV sites, over 1 in 5 (22%) said screen tourism would be the main reason for visiting the UK in the future, this impact falls to 18% amongst 35-54 and falls to 14% for those over 55 years.



Appendix

Heart drawn on sand on beach, Dorset, England ©VisitBritain/Herewegoagain.blog

60 nations ranked in 2023

Argentina	France	Netherlands	Slovakia
Australia	Germany	New Zealand	South Africa
Austria	Greece	Northern Ireland	South Korea
Belgium	Hungary	Norway	Spain
Botswana	Iceland	Panama	Sweden
Brazil	India	Peru	Switzerland
Canada	Indonesia	Philippines*	Taiwan
Chile	Ireland	Poland	Tanzania
China	Israel	Portugal*	Turkey
Colombia	Italy	Qatar	Ukraine
Czech Republic	Japan	Romania*	United Arab Emirates
Dominican Republic	Jordan*	Russia	United Kingdom
Ecuador	Kenya	Saudi Arabia	United States
Egypt	Mexico	Scotland	Vietnam*
Finland	Morocco	Singapore	Wales

In 2023, Latvia, Palestine, Thailand and Serbia were removed from the 60 nations and Portugal, Romania, the Philippines and Jordan were added. These changes have made no difference to the UK's ranks at the global level.

Panel market sample sizes

Panel Market	Sample
Argentina	3,000
Australia	3,000
Brazil	3,000
Canada	3,000
China	3,000
France	3,000
Germany	3,000
India	3,000
Italy	3,000
Japan	3,000
Mexico	3,000
Poland	3,000
Russia	3,000
Saudi Arabia	3,000
South Africa	3,000
South Korea	3,000
Spain	1,000
Sweden	3,000
Turkey	3,000
US	3,000

VisitBritain commissioned research in one additional market which are not part of the standard panel (outlined above) in 2023; **Spain**. Fieldwork in this market took place at the same time as the standard NBI survey, but with a reduced sample size.

Key definitions

UK Screen Tourist: Respondents who have taken a leisure trip to the UK in the last 10 years and have previously visited a film/TV location in the UK

UK Considerer: Respondents who have not taken a leisure trip to the UK in the last 10 years but would consider doing so in the future