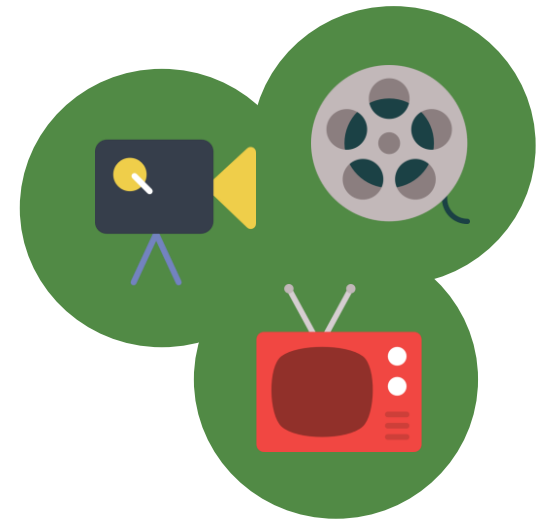


Film and TV locations as a driver of tourism

Foresight – issue 160

VisitBritain Research
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Introduction

The following report is based on three questions that were asked to respondents in the GFK-Anholt Nation Brands Index in July 2017. These questions were sponsored by VisitBritain and do not form part of the regular Nation Brands Index.

The three questions are as follows:

- ***Have you ever visited a film or TV location whilst on a holiday/vacation abroad? Yes; No, but I would be interested in doing so; No and not interested in doing so***
- ***If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination?***
- ***If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?***

NB the questions referred to holidays abroad in general, not specifically holidays to the UK.

The survey was conducted online amongst respondents from Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA.

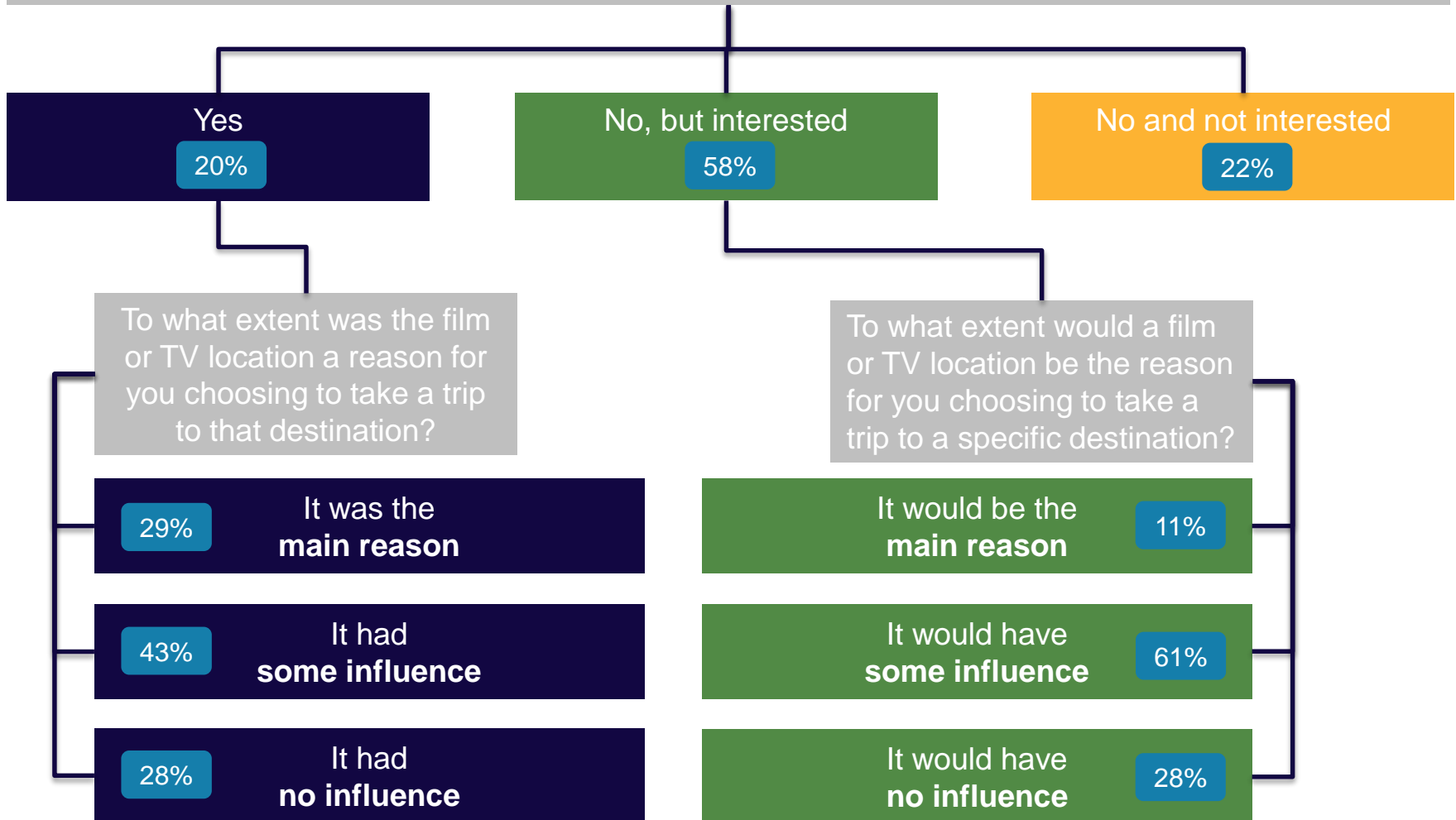
Respondents are representative of the online population in each market.

Throughout this report those that have previously visited the UK might not have decided to visit the UK because of a film/TV location, it might have been on another international holiday.

Highlights

- Overall, 6% of respondents indicated they had previously visited a film/TV location on holiday and that this was the main reason for them choosing the visit the destination. A further 9% said a film/TV location had had some influence in the destination previously visited for a holiday. In total, 20% have visited a film or TV location whilst on holiday abroad.
- Of those who have previously visited the UK at some stage in the past, a higher proportion (31%) had visited a film location on holiday, vs. 15% who had not visited the UK before. (NB they did not necessarily visit the film/TV location while on their trip to the UK.)
- Almost all markets in the study had high proportions of respondents say they had or would be interested in visiting a film or TV location – the highest markets to do so were China, India and South Korea. In total, either 78% either had or would be interested in doing so.
- Of those who indicated they had visited a film or TV location on holiday, 29% said a film or TV location was the main reason for selecting the holiday destination. This rises to 33% amongst those who have previously visited the UK.
- Amongst respondents who had not previously visited a film or TV location on holiday, but indicated they would be interested, 11% said a film or TV location would be the main reason for choosing a holiday destination. However, a further 3 out of 5 respondents said a film or TV location would have some influence on destination choice.
- Within each market surveyed, at least 50% of all respondents who had not previously visited a film or TV location on holiday said a film or TV location would have some influence on their decision to take a holiday to a specific destination.

Have you ever visited a film or TV location whilst on holiday abroad?



Film/TV location and holiday destination choice

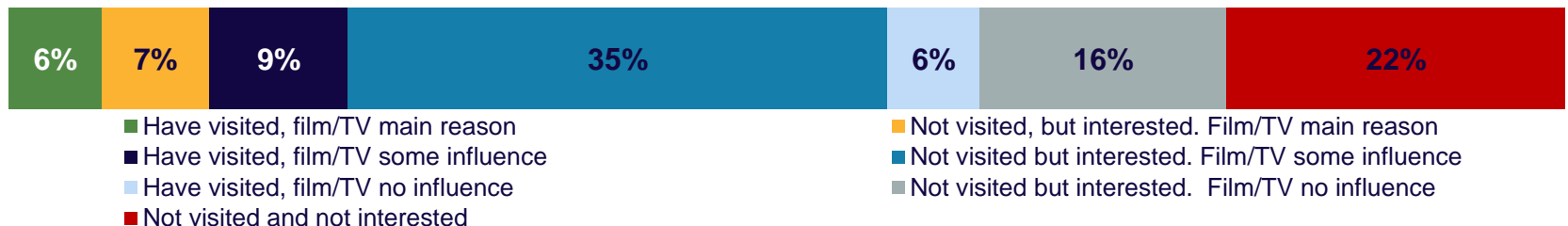
In recent years the location of films such as *Pride and Prejudice*, *Harry Potter* and *James Bond* and television productions including *Downton Abbey* and *Doctor Who* – to name a but a few – have been included on many tourists' itineraries in the UK.

Overall, 6% of respondents indicated they had previously visited a film/TV location on holiday and that this was the main reason for them choosing the visit the destination. A further 9% said a film/TV location had had some influence in the destination previously visited for a holiday.

The highest proportion of respondents were those who had not previously visited a film/TV location on holiday, but indicated that they were interested in doing so and that a film or TV location would have some influence on their destination choice. Just over 1 in 5 said they had not visited a film or TV location on holiday and had no interest in doing so.

Results vary by market (see next slide), but it is those from South Korea, India and China who are the most likely to have already selected a holiday destination based on a film or TV location, while it is those from Brazil, Mexico and Turkey who expressed the highest levels in possibly choosing a holiday destination based on a film or TV location in the future.

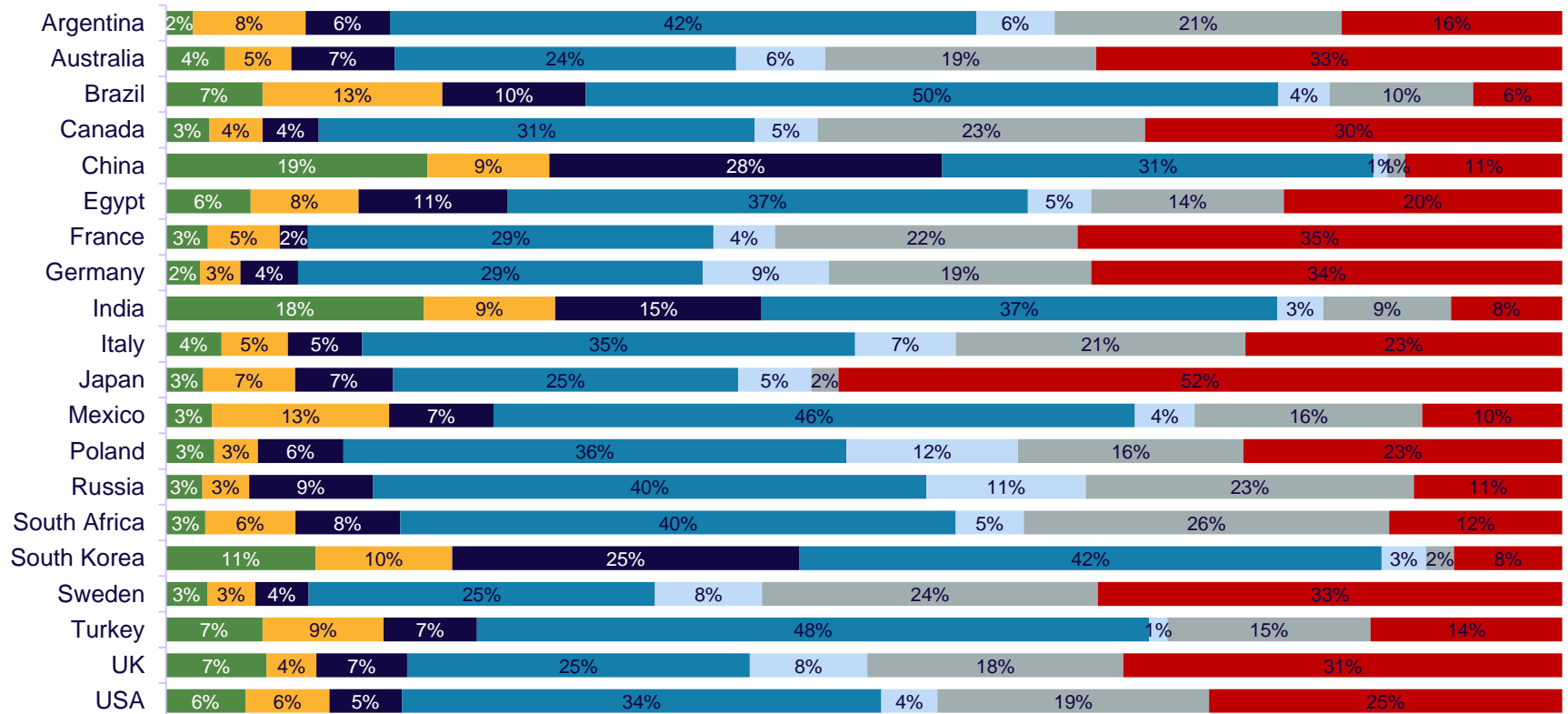
Have you ever visited a film or TV location whilst on a holiday/vacation abroad?



Film/TV location and holiday destination choice

By market

Have you ever visited a film or TV location whilst on a holiday/vacation abroad?



- Have visited, film/TV main reason
- Have visited, film/TV some influence
- Have visited, film/TV no influence
- Not visited and not interested
- Not visited, but interested. Film/TV main reason
- Not visited but interested. Film/TV some influence
- Not visited but interested. Film/TV no influence



Propensity to visit a film or TV location on holiday

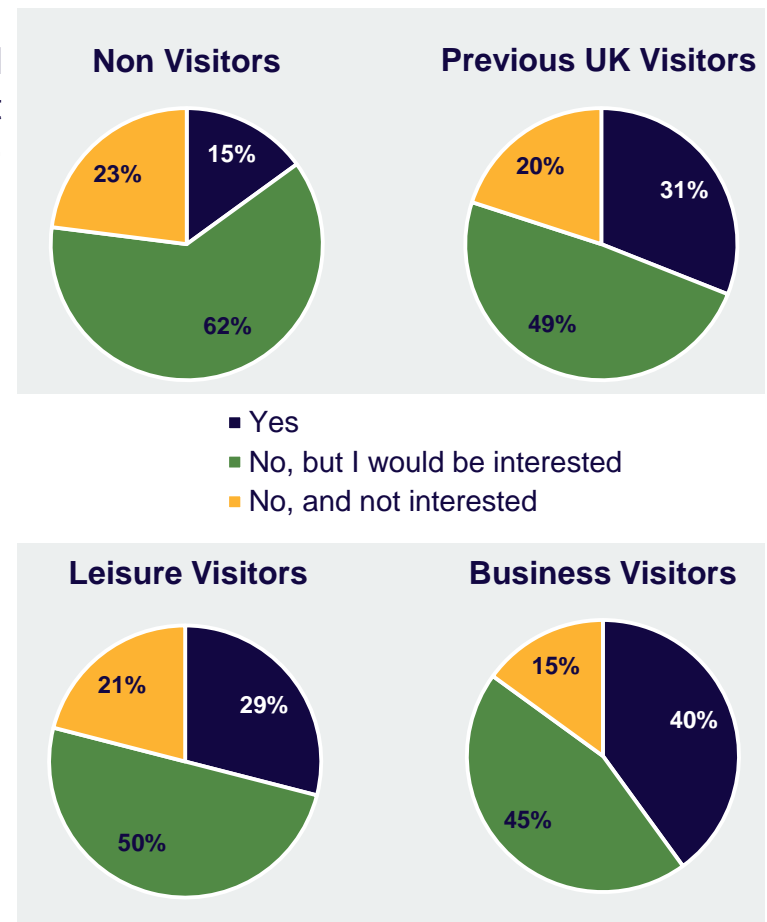
Propensity to visit a film or TV location

Visitor types

One third of respondents who have previously visited the UK, said they had taken an international holiday and visited a film or TV location while there. (NB they did not necessarily visit the film/TV location while on their trip to the UK.)

Amongst respondents in the study who had not previously visited the UK, 15% said they had visited a film or TV location on holiday. But amongst those who had previously visited the UK, this rate doubles, with more than 30% stated they had visited a film or TV location on a previous holiday.

Those who had previously been in the UK on business had a higher propensity to include a visit to a film or TV location than those who were on holiday (40% vs. 29%). This might be a result of many business events including excursions and entertainment. Furthermore, just 15% of business visitors said they were not interested in a film or TV location, vs. 21% of leisure visitors.

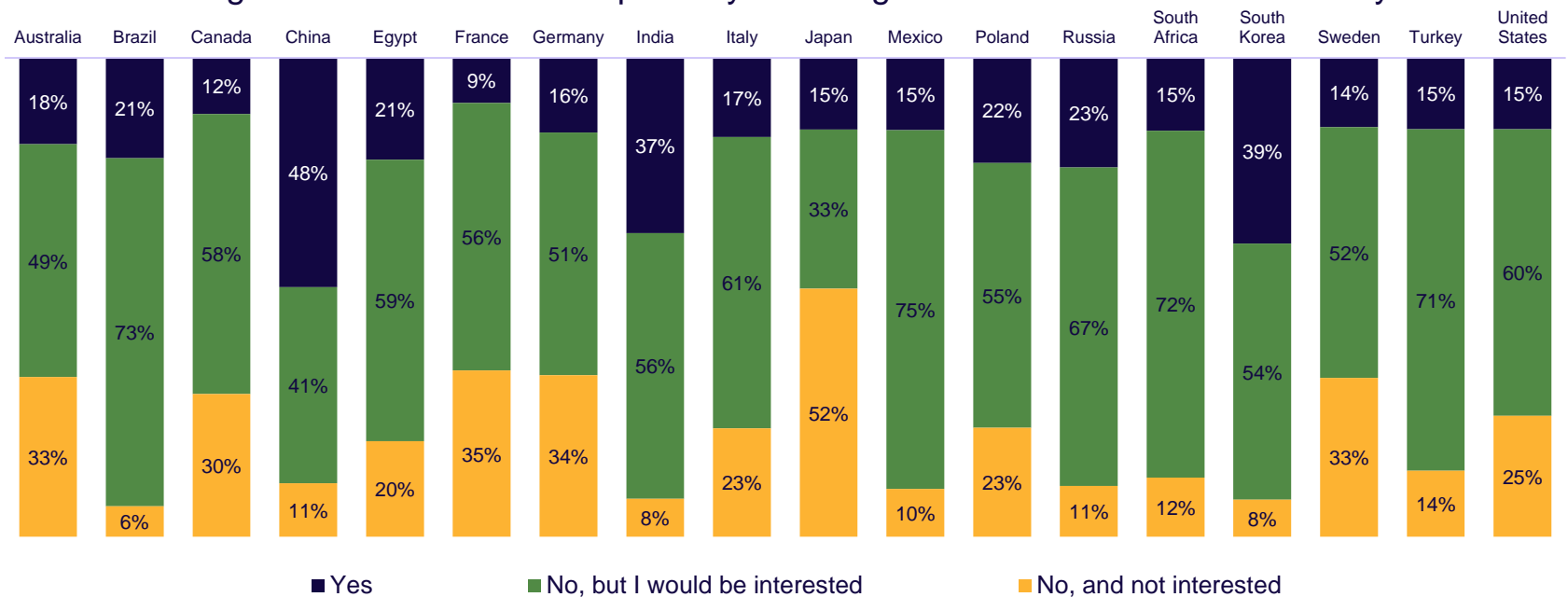


Propensity to visit a film or TV location

Markets (1)

Overall, most markets in this study had a high proportion of respondents who had either included a visit to a film or TV location on a previous international holiday or were at least interested in doing so. The exceptions here were those from Japan with over half not interested and Australia, Canada, France, Germany and Sweden – but to a lesser degree.

It was respondents from China, India and South Korea who were most likely to have visited a film or TV location on a previous holiday and those from Turkey, South Africa, Mexico and Brazil that showed the highest levels of interest in possibly including film or TV locations on a holiday abroad.



Propensity to visit a film or TV location

Age and gender

More than 20% of under 45s indicated they had visited a film/TV location on a previous holiday. This rises to a quarter of all respondents between the ages of 25 and 34 years old.

The highest proportion of those that had either visited or were at least interested in visiting a film or TV location were those under the age of 25 (85%). This proportion drops gradually with age to as low as 57% amongst those aged 65+. Almost half of the over 65s in this survey said they had not previously visited a film or TV location and were not interested in doing so.

	Age						Gender	
	18-24	25-34	35-44	45-54	55-64	65+	Male	Female
Yes	22%	25%	23%	15%	14%	14%	22%	19%
No, but would be interested	63%	59%	60%	58%	56%	43%	55%	61%
No, and not interested	15%	16%	18%	27%	30%	43%	23%	21%

Men were slightly more likely to have previously visited a film or TV location on holiday than women, though when considering those who have not previously visited, 3 out of 5 women said they would be interested in doing so in the future.

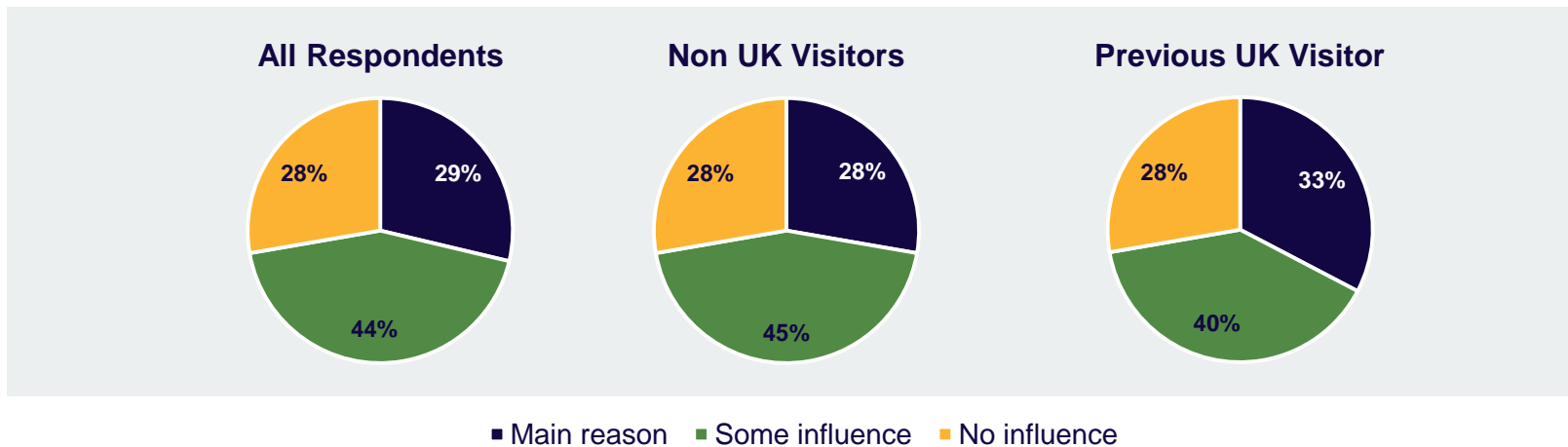


Impact of film or TV locations on destination choice

Previous impact of a film or TV location on past destination choice – Visitor/Non visitor

When a respondent indicated they had previously visited a film or TV location on holiday, we asked a follow up question to find out the extent a film or TV location was in choosing the trip destination.

To what extent was the film or TV location a reason for you choosing to take a trip to that destination?



Among previous visitors to the UK, there was slightly higher proportion who indicated a film or TV location was the main reason for choosing the holiday destination. Overall, 72% of both previous UK visitors and non UK visitors said a TV or film location had at least some influence on a previous holiday destination choice.

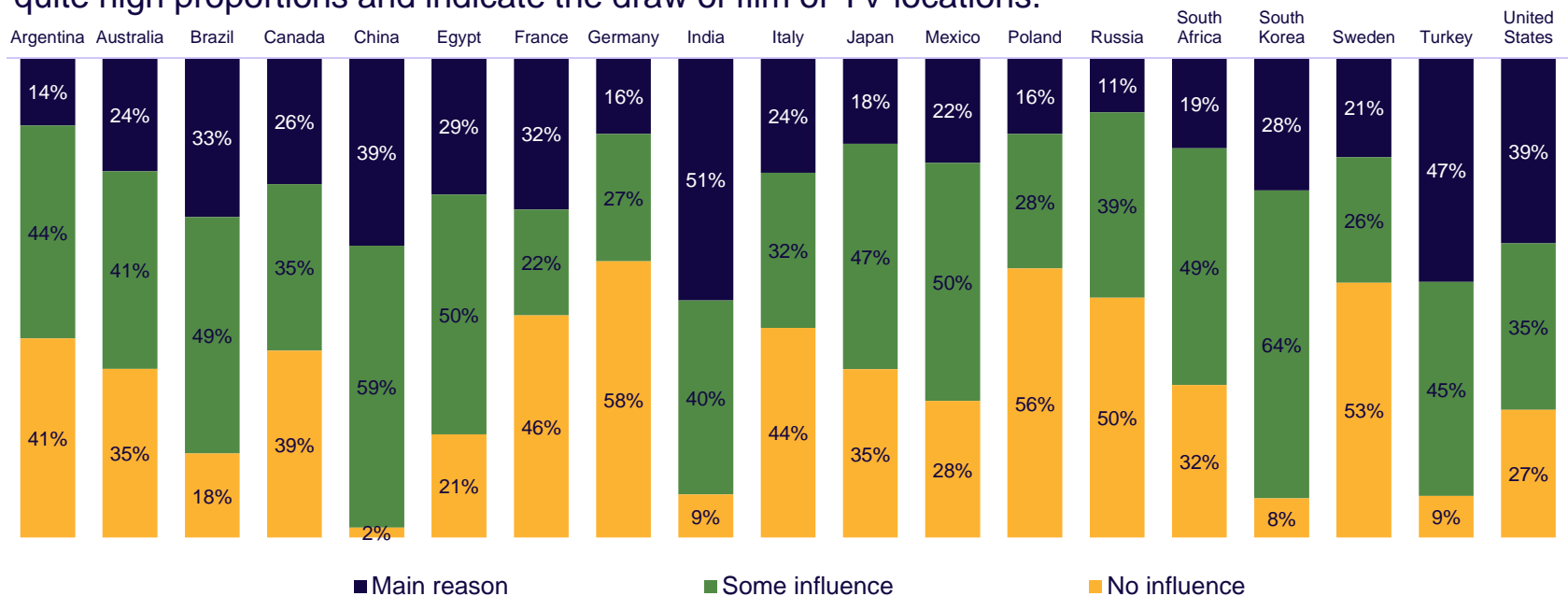
(NB they did not necessarily visit the film/TV location while on their trip to the UK.)

Previous impact of a film or TV location on past destination choice – Markets

Amongst those who had previously visited a film or TV location high proportions had made a destination decision, at least in part, because of a film or TV location.

The vast majority of those from China, India, South Korea and Turkey (>90%) all indicated a film or TV location had at least some influence on destination choice.

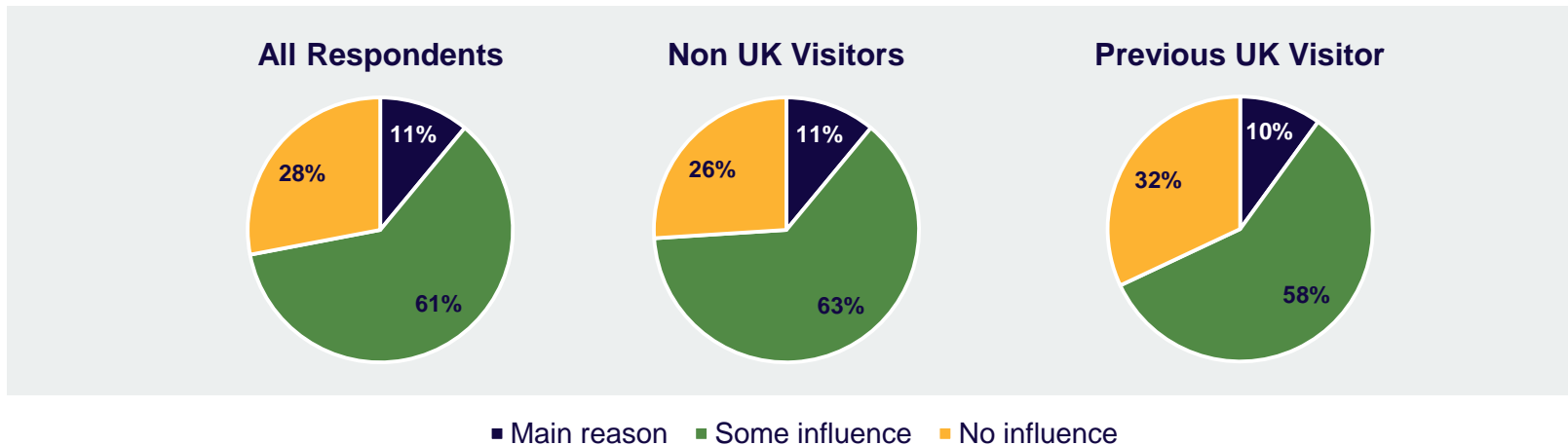
At the opposite end of the scale were those from Germany and France where 42% and 44% respectively agreed a film of TV location had influenced destination choice – though these are still quite high proportions and indicate the draw of film or TV locations.



Possible impact of a film or TV location on future destination choice – Visitor/Non visitor

When a respondent indicated they not previously visited a film or TV location on holiday, but were interested in doing so, we asked a follow up question to find out the extent a film or TV location might be in choosing the trip destination.

To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?



Between non visitors and previous visitors to the UK there was little difference in the impact a film or TV location may have on future destination choice – roughly 10% indicated it would.

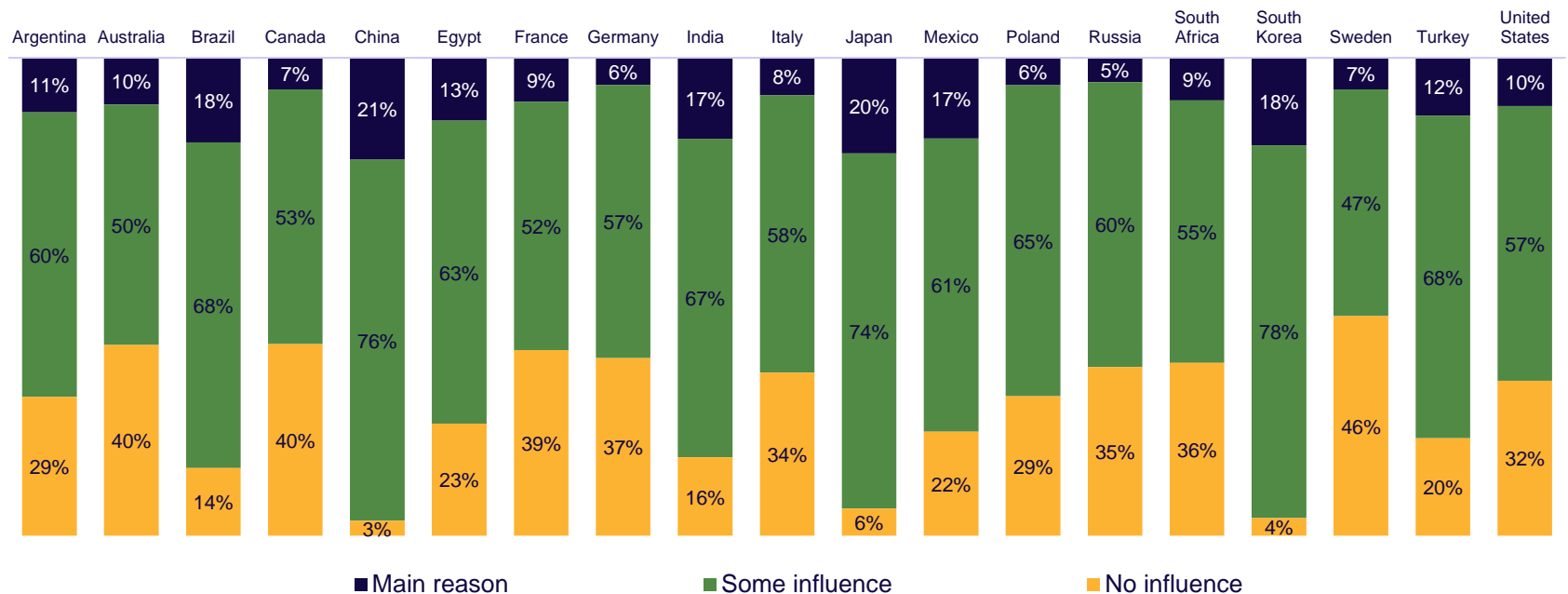
There were higher proportions of non UK visitors who indicated a film or TV location would have some influence on destination choice, than those who had previously visited the UK.

(NB they did not necessarily visit the film/TV location while on their trip to the UK.)

Possible impact of a film or TV location on future destination choice – Markets

Of those who had not visited a film or TV location on holiday, the proportion who were interested in doing so in future varied by market – but at least 50% of all respondents in each market said a film or TV location could have at least some impact on destination choice.

Markets with the highest levels of agreement that film and TV locations would be a main reason for choosing a holiday destination are China, Japan, South Korea, Brazil, India and Mexico.



Further resources

VisitBritain regularly publishes inbound research. Below are links to some recent reports and to the data visualisations on our website for further information:

Britain's image overseas

(Full analysis of GFK Nations Brand Index)

<https://www.visitbritain.org/Britain's-image-overseas>

Activities undertaken in Britain

(including IPS data on visiting literary, music, TV and film locations)

<https://www.visitbritain.org/activities-undertaken-britain>

Understanding international visitors

(Includes research on motivations to visit the UK)

<https://www.visitbritain.org/understanding-international-visitors>

Analysis of the appeal of different activities in a holiday to England among international audiences

<https://www.visitbritain.org/activities-and-themes>

Inbound Tourism Trends by Market

<https://www.visitbritain.org/inbound-tourism-trends>



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