

Insight Department: The Outlander Effect & Tourism

March 2019

Welcome

Stories have been intertwined through the fabric of Scotland from the earliest of days. The landscape, heritage, culture and people have contributed to and inspired writers to chronicle real events or weave myths and create legends. Many writers have taken inspiration from Scotland to provide a backdrop for epic and engrossing novels that have delighted readers for generations.

There has been a long history of literature inspiring people to travel. It has been claimed¹ that the publication of Sir Walter Scott's "The Lady of the Lake" inspired others to come to Scotland, and therefore create what could best be described as modern tourism. More recently, film and television have created a new genre of travel "screen tourism" or "Set-Jetting" to witness first hand the locations seen on the screen. Exemplified by the huge impact of the film *Braveheart*, its mix of filming locations and historical basis intrigued visitors to find out more. More recently, one of the biggest impacts in this area has been from the work of Diana Gabaldon. **Its name is Outlander.**

The Outlander franchise is a series of novels and short stories by author Diana Gabaldon. First published in 1991, they feature elements of historical fiction, romance, adventure, fantasy and time travel. The franchise expanded in 2014 when *Outlander* was adapted for television by Sony Pictures and film production was based within Scotland.

Outlander follows the story of Claire Randall, a married combat nurse from 1946 who is mysteriously swept back in time to Scotland, 1743, where she is immediately thrown into an unknown world in which her life is threatened. When she is forced to marry Jamie Fraser, a chivalrous and romantic young Scottish warrior, a passionate relationship is ignited that tears Claire's heart between two vastly different men in two irreconcilable lives².



Scotland's history and landscape play an integral role in the storylines. Since their publication and subsequent broadcast on the small screen a loyal and committed fan base has developed. They travel to Scotland to visit the locations, both described in the story lines, but to also see the filming locations to perhaps re-enact the scenes their favourite actors or characters have appeared in. This phenomenon has had a profound legacy on the locations used in the production, it is this *Outlander Effect* we are examining in this paper.

Set-Jetting

The appeal of Screen Tourism

What is screen tourism? Known by many names – screen tourism, film tourism, set-jetting or film-induced tourism, it all relates to a visitor's journey.

Put simply, screen tourism is a genre of tourism that provides a connection with the location of a film or a TV series. A trip to a set, or filming location will take the visitor into the centre of their fandom where they can experience a new dimension of their favourite TV show or film.

Screen tourism represents an opportunity for a new and more profound way of experiencing tourism destinations. The growing consumer trend towards meaningful experiential travel is at the heart of this movement. When you combine this with the growth of user-generated content on social media and the power of referrals for destination promotion, screen tourism forms the possibility for new natural advocates and digital “tribes” to be created by way of sharing imagery, blogs, and experiences among the visitors themselves.

National Tourist Boards and Regional Destination Management Organisations are increasingly seeing screen tourism as a benefit.

Talking Outlander

Fans of Sam Heughan (Jamie Fraser) call themselves Heughan's Heughligans.

There are also Caitriots and Menziatics...

Firstly, the production itself promotes the destination and may be distributed internationally, with successful productions having a consumer reach into the millions. Secondly, proactive promotion, sustainable management and careful product development will enhance direct expenditure revenue from visitors who travel to see the filming locations or destinations that inspired the story lines.

Defining the target market for screen tourism can be challenging. Some productions like blockbuster film, Braveheart, attract a broader market profile. Niche productions or topic specific programming appeal to smaller but potentially more dedicated fan base.

Did You Know?

According to the 2018 BFI publication³ “Screen Business”, a study analysing the impact of each of the screen sector tax reliefs currently in place in the UK:

Inbound tourists in 2016, spent an estimated £597.7 million in film-related screen tourism in the UK. This spending generated 13,440 FTEs of total employment (i.e. including direct, indirect and induced impacts) and £628.3 million in total GVA. This economic activity yielded an estimated £194.9 million in tax revenue.

Tourism has a strong element of spill-over impacts for High End Television (HETV, this is defined as a production made at £1m or above per broadcast hour) productions generating an additional 5,990 FTEs and £267.8 million in GVA for the UK economy, and bringing the overall economic contribution of HETV to 32,660 FTEs and £1.72 billion in GVA.

Who are the Outlander visitors?

In its first series, Sony Pictures⁴ had distributed Outlander to over 87 territories, from China to the US. This huge global coverage provided massive potential appeal for visitors to come to Scotland and see the locations. But who are the markets for screen tourism for Outlander?

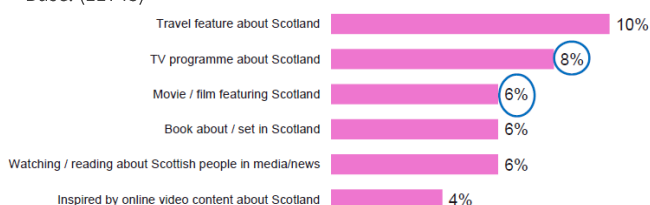
Did You Know?

Around 8% of leisure visitors to Scotland (or approximately 700,000 domestic and international overnight visitors) were influenced by a TV programme about Scotland.

Source: VisitScotland Visitor Survey / GBTS / IPS

VisitScotland regularly undertakes Scotland-wide visitor surveys. The most recent survey⁵ (2015/16, a “summer only” survey which reflected the views of the main holiday season visitors) examined the motivators that attracted people to choose Scotland. Of the 11,743 respondents to the survey it was discovered that 1 in 10 visitors were influenced by a travel feature about Scotland, whilst TV, film and books were also important prompts to considering Scotland as a destination, especially for international visitors

Did any of these prompt you to consider Scotland for this holiday ?
Base: (11743)



While travel features, movies, TV programmes and books can inspire individuals to visit, it is European and Long Haul visitors that it has the greatest influence.

Outlander

The word cloud above shows the TV productions mentioned by visitor survey respondents. It demonstrates, by the size of the word reflecting the frequency of mentions, that Outlander (both TV and book) clearly has a significant impact in inspiring visitors to travel to Scotland, particularly those from the USA. The word cloud below shows the same responses and frequency of TV productions mentioned, but with Outlander removed.



Key Takeouts:

- TV and film play a role in inspiring visitors to come to Scotland and act as a prompt to visit, particularly for European and long haul markets.
- Popular TV shows, such as Outlander, are the stand out ones mentioned by visitors. Outlander is especially popular with visitors from the USA, Australia, and increasingly, China.
- Some visitors take part in specific TV/film related activities when on holiday in Scotland, such as visiting a TV or film location. Of all visitors surveyed 6-8% visited a location, but this rises to 18% for American visitors. Within Europe, French (17%) and German (16%) visitors are the most likely to visit locations.

Understanding our Visitors

VisitScotland publishes the latest data and trends on the volume and value of our key markets to Scotland. The factsheets also provide information on the latest consumer trends and attitudes. For our top international Outlander markets to Scotland, some essential insights are provided below.

Visitors From Australia

Beautiful scenery, history and culture alongside Scotland's reputation for friendly people are all key motivating factors for visiting Scotland. Australian visitors like to meet local people and class it as a desired element of their authentic holiday experience.

Key Websites Used

- | | | |
|---------------------|---------------|-------------------------|
| • Facebook | • Yahoo | • News.com.au |
| • Google | • ABC News | • eBay |
| • Email (Gmail etc) | • Banking | • Sydney Morning Herald |
| • Nine.com.au | • Ancestry UK | |

Key Social Media Accounts

- | | | |
|---------------|-------------|-------------|
| • Facebook | • Google+ | • Instagram |
| • TripAdvisor | • Pinterest | • Whatsapp |
| • YouTube | • LinkedIn | |

Influential Film and TV Programmes for Travel

- | | | |
|-----------------------|-----------------------------|--------------|
| • Outlander | • Hamish Macbeth | • Braveheart |
| • Coast | • Edinburgh Military Tattoo | |
| • History of Scotland | | |

Source: VisitScotland Research 2014/2017

PLANNING & BOOKING

Australian visitors tend to plan furthest ahead, unsurprising given they have the greatest travel distance.

Planning:	42.7 weeks
Travel booking:	22.4 weeks
Accommodation booking:	19.3 weeks

Australian visitors are likely to use the web and web search when planning their holiday. Travel review websites are particularly popular. They are also more likely to talk with friends and family when planning a visit and seek out personal advice from travel agents.



MOTIVATIONS TO VISIT SCOTLAND

- | | |
|--|---|
| | Scenery & landscape 49%
(survey average 50%) |
| | History & culture 48%
(survey average 33%) |
| | Always wanted to visit 30%
(survey average 15%) |
| | My Scottish ancestry 27%
(survey average 9%) |
| | Visit family/friends who live in Scotland 26%
(survey average 21%) |

Scotland's vast and breath-taking landscape is a key motivator for Australian visitors to visit. History and culture is also important, but less so in comparison to North American markets.

Aspects Important in Choosing Accommodation:

- | | |
|--|---|
| | Location 84% |
| | Value for Money 62% |
| | Availability of free Wi-Fi at accommodation 55%
Highest for all markets included |
| | Quality star grading 35% |

Popular visitor source areas in Australia include Victoria, New South Wales, Queensland and Western Australia.



Understanding our Visitors

Visitors From France

Visitors from France are likely to be affluent professionals. Many will be visiting from large conurbations in France, including: Ile-de-France, Auvergne-Rhône-Alpes and Provence-Alpes-Côte d'Azur.

Key Websites Used

- Google
- Facebook
- Yahoo
- Orange.fr
- Le Monde
- YouTube
- Windows Live

Key Social Media Accounts

- Facebook
- WhatsApp
- YouTube
- TripAdvisor
- Google+
- LinkedIn
- Pinterest
- Instagram
- Twitter
- Viadeo

Influential Film and TV Programmes for Travel

- Outlander
- Braveheart
- James Bond Skyfall
- Échappée Belle

Source: VisitScotland Research 2014-2017

PLANNING & BOOKING

On average, visitors from France tend to plan 4 months in advance.

Planning: 17.7 weeks
Travel booking: 12.9 weeks
Accommodation booking: 10.2 weeks

French visitors are likely to use multiple types of information in planning their holiday, particularly websites, such as search engines and review sites. They are also more likely than average to rely on printed travel guide books.



Source: Scotland Visitor Survey 2015/2017

Aspects Important in Choosing Accommodation:



Value for Money
75%



Location
44%



Quality star grading
34%



Availability of free Wi-Fi at accommodation 30%

A destination full of “myths and legends”, Scotland is seen by French visitors as a place which has much to offer. It is beheld as a place of vast natural beauty, lochs and panoramic views, enhanced by its unique history and culture.

Visitors From Germany

A destination for “romantic adventurers” who can venture off the beaten track and best enjoy Scotland through walking and exploring. Generally, Scotland is viewed as a country of great natural beauty, rich in history and culture. Its reputation for vast, unspoilt landscapes is a motivational visiting factor for the majority of German visitors.

Key Websites Used

- Google
- Web
- Facebook
- GMX
- T-Online
- Ebay
- Spiegel
- Yahoo
- Amazon
- Wikipedia
- Bild
- Wetter

Key Social Media Accounts

- Facebook
- Whatsapp
- YouTube
- TripAdvisor
- Google+
- LinkedIn
- Instagram
- Twitter
- Pinterest

Influential Film and TV Programmes for Travel

- Outlander
- Highlander
- Braveheart
- Harry Potter
- Rob Roy
- MareTV

Source: VisitScotland Research 2014-2017

TOP 5 ACTIVITIES IN SCOTLAND



Sightseeing by car/coach/on foot 85% (survey average 74%)



Visited castle/ historic house 84% (survey average 60%)



Visited cities 79% (survey average 42%)



Visited cathedral, church 78% (survey average 46%)



Centre based walking (i.e around a town centre) 72% (survey average 45%)

PLANNING & BOOKING

On average, visitors from Germany start to plan about 6 months ahead. They tend to plan further ahead than the Southern European markets.

Planning: 25.9 weeks
Travel booking: 16.7 weeks
Accommodation booking: 14.0 weeks

Visitors from Germany are likely to use multiple types of information in planning their holiday, particularly websites and talking with friends and family. They are also much more likely than average to rely on printed travel guide books (e.g. Lonely Planet, Rough Guide, Fordsors).



Viewed as a unique and authentic holiday experience, Scotland also offers a German visitor the chance to get away from everyday life and discover something new

Understanding our Visitors

Visitors From the USA

Scotland enjoys a positive image amongst USA nationals. In general, Scotland is viewed as a country of great natural beauty, rich in history and culture. Scotland's reputation as the 'Home of Golf' is another inspiring factor for visitors from the USA.

Key Websites Used

- | | | |
|------------|--------------------------|-------------------|
| • Facebook | • Email (gmail, Hotmail) | • New York Times |
| • Google | • Aol | • Pinterest |
| • Yahoo | • CNN | • Huffington Post |
| • Msn | • BBC news | |
| • Amazon | • Twitter | |

Key Social Media Accounts

- | | | |
|---------------|-------------|------------|
| • Facebook | • Pinterest | • Whatsapp |
| • YouTube | • LinkedIn | • Snapchat |
| • TripAdvisor | • Instagram | |
| • Google+ | • Twitter | |






Influential Film and TV Programmes for Travel

- | | | |
|----------------|-----------------|-----------------------|
| • Outlander | • Downton abbey | • Travel Channel |
| • Rick Steeves | • Braveheart | • National Geographic |

Source: VisitScotland Research 2014-2017

ACCOMMODATION

Accommodation Preferences:

- | | |
|---|---|
|  | Hotel 62%
(survey average 41%) |
|  | B&B/GH 38%
(survey average 20%) |
|  | Friends/family 23%
(survey average 19%) |
|  | Self-catering 12%
(survey average 22%) |
|  | Airbnb 14%
(survey average 5%) |

PLANNING & BOOKING

On average, visitors from USA start to plan 10 months in advance.

Planning:	40.9 weeks
Travel booking:	21.7 weeks
Accommodation booking:	21.6 weeks

Visitors from USA are likely to use many types of information in planning their holiday, particularly websites, their friends and family and printed travel guide books. They are also more likely than average to seek personal advice from a travel agent.



Scotland's history & culture is a stronger motivator for visitors from the USA. Film and TV shows about Scotland are important prompts for visits, especially Outlander.

Ancestral links may encourage visitors from USA to go 'off the beaten track'.

For those on a specific ancestral visit, sightseeing, researching ancestry and 'walking in their steps' are key elements of a trip.

Scotland welcomes millions of visitors every year and VisitScotland's Insight department carries out in-depth research and a variety of analytical tasks to help better understand our diverse domestic and international markets. Tourism businesses can access factsheets for the markets highlighted here and others, along with a huge range of additional business intelligence at www.visitscotland.org/research-insights/



Witnessing the Outlander Effect

How do we measure the Outlander Effect? For VisitScotland it is through the performance metrics gathered from our flagship consumer website domain VisitScotland.com. Web analytics is the collection, reporting, and analysis of website data. During the period September 2017 to October 2018, our Digital Analytics department undertook a top level analysis of the Outlander pages on VisitScotland.com. The anonymous, aggregated results that are available help us understand the profile of visitors to the website, where they came from, how they got to the website and what other “content” they consumed.

Did You Know?

Google provide both a **free** and **premium** web **analytics** service that allows you to analyse in-depth detail about the visitors on your website.

Google Analytics lets you measure your advertising ROI as well as track your Flash, video, and social networking sites and applications.

Check out **digitaltourismscotland.com**⁶ for straightforward advice on how to use digital marketing and technology to benefit your tourism business

How popular is Outlander on VisitScotland.com? For September 2017 to October 2018 there were 716,000 page-views of Outlander content on the website (visitscotland.com/see-do/attractions/tv-film/outlander). There were 46,000 page-views for the month of September 2018 alone. It was also the **5th most popular** VisitScotland webpage in the 12 month period (n.b. There were around 51 million page views in total during the same time period).

Search Engine Optimisation (SEO) is the practice of increasing the quantity and quality of traffic to your website through organic search engine results – or having the best “words” on your website to be “found” by a search engine e.g. Google, Baidu or Bing.

SEO rankings for the main Outlander page placed **1st in Google searches** for the following queries:

Outlander, Scotland, Outlander Filming Locations, Outlander locations Scotland, Outlander Tours and “Where is Outlander filmed” (a long tail keyword!)

That is to say, when one of those search terms was put in Google, the VisitScotland Outlander page appeared top of the search list.

What else did users click on after finding Outlander?

From the Outlander page there were 125,000 clicks to other pages on visitscotland.com exploring content such as standing stones, castles, ancestry and other TV and film locations. The table below highlights the Top 10 pages visited after the VisitScotland Outlander page.

Ranking	Top 10 Pages	Page Views	%
1	www.visitscotland.com/about/history/ standing-stones/ www.visitscotland.com/see-do/attractions/tv-film/ outlander/itinerary/	20,721	21%
2	www.visitscotland.com/see-do/attractions/ tv-film/	16,194	16%
3	www.visitscotland.com/see-do/attractions/ castles/	6,633	7%
4	www.visitscotland.com/see-do/ research-your-ancestry/	6,209	6%
5	www.visitscotland.com/info/see-do/ doune-castle-p254201	3,538	4%
6	www.visitscotland.com/info/towns-villages/ great-moor-of-rannoch-p246531	3,266	3%
7	www.visitscotland.com/destinations-maps/ glencoe/	2,358	2%
8	www.visitscotland.com/about/ scottish-weddings/	1,794	2%
9	www.visitscotland.com/info/see-do/ highland-folk-museum-newtonmore-p251241	1,698	2%
10		1,436	1%

The most popular referral pages or external link clicks included **hopetounhouse.co.uk**, German tour / holiday searches and **poetryfoundation.org**.

Who are the visitors? Outlander content consumers are mainly **women** at 77% compared to the 58% average for female visitscotland.com website visitors. They are also **likely to be 25-54**, with a **quarter** of them being in the **25-34 age group**.

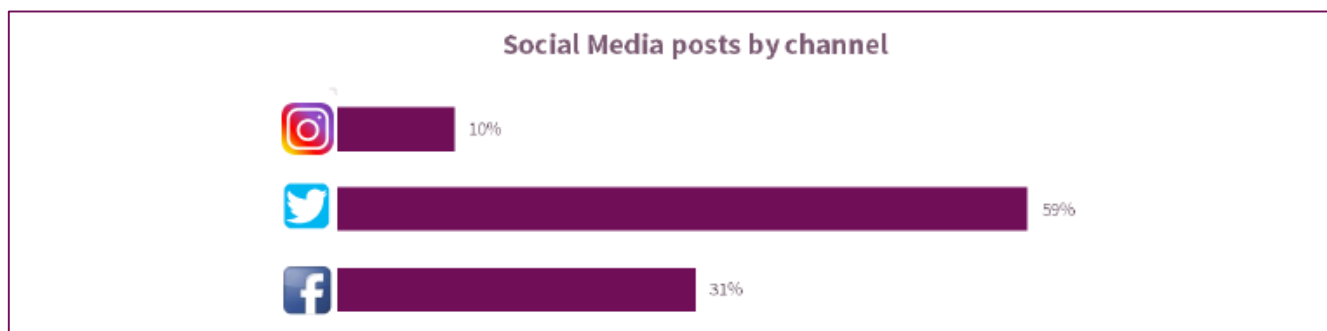
Analytics continued

Where do our website visitors come from? Visitors from the UK and US account for 43% of the web traffic to the Outlander pages. Besides the UK and US, Outlander content consumers mainly come from Germany and France, reinforcing the evidence gathered from our National Visitor Survey.

Country	Sessions	Page Views	Outlander content users
Outlander content users	519,581 % of Total: 2.50% (20,819,969)	1,495,941 % of Total: 2.94% (50,852,821)	
1. United Kingdom	134,208	22.25%	1. (not set)
2. United States	131,503	21.01%	2. London
3. Germany	40,791	9.02%	3. Edinburgh
4. France	36,129	8.36%	4. Glasgow
5. Spain	28,668	5.91%	5. Paris
6. Canada	27,464	5.93%	6. Madrid
7. Netherlands	24,917	5.51%	7. Sydney
8. Australia	20,811	4.18%	8. Melbourne
9. Italy	9,961	3.07%	9. Aberdeen
10. Belgium	6,131	1.85%	10. Amsterdam

Fans of Outlander from the UK looking at VisitScotland Outlander content originate from London, Edinburgh and Glasgow. For international markets, Paris, Madrid and Sydney are the top 3 cities to bring the Outlander audience to the site.

How did they arrive at the Outlander site? Around three-fifths (59%) of Outlander content consumers are generated from **organic traffic** (Visitors are considered **organic** by finding the website using a search engine like Google or Bing, so they are not “referred” by any other website). Almost a quarter (23%) of visitors are generated from social channels.

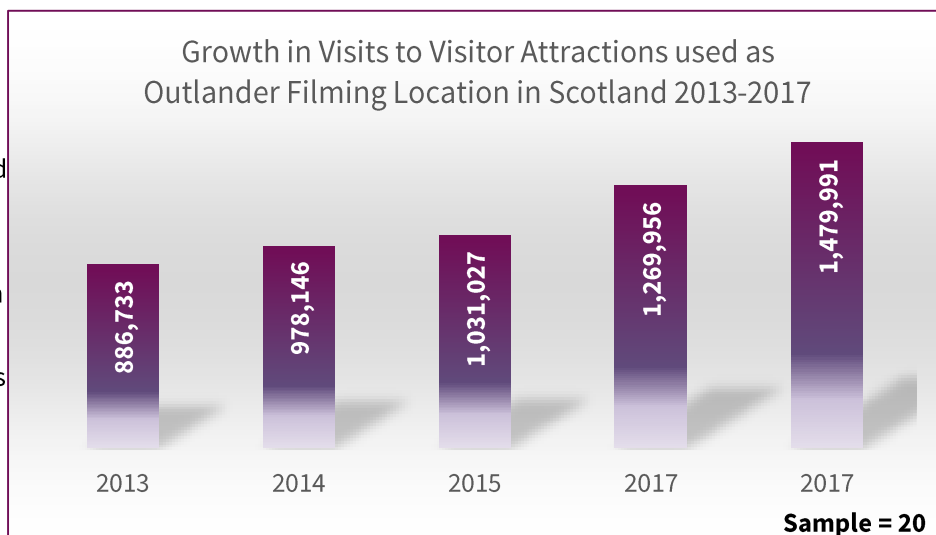


Outlander content consumers have a **higher propensity** to come from **Social Media** channels than the average VisitScotland.com web user. Of the main social media channels, Twitter was the top performing, followed by Facebook.

The Impact of Outlander on Visitor Attraction Performance

Visitor attractions used as filming locations are one of the main beneficiaries of the

Outlander Effect. Figures provided by the Moffat Centre for Travel and Tourism at Glasgow Caledonian University in their Visitor Attraction Monitor⁷ demonstrate the growth in attendance for visitor attractions from the start of Outlander broadcasts in 2014.



With the varied number of locations used, the benefits to the visitor economy are distributed throughout Scotland. Of the attractions providing permission to publish their data, we can see that the majority have seen double digit increases in attendance from 2013 to 2017. Furthermore, the size of the attractions (Preston Mill, 2,748 visitors in 2017 to Glasgow Cathedral, 389,101 visitor in 2017) also demonstrates the scale and impact of screen tourism is not biased to already popular destinations.

Attraction	2013	2014	2015	2016	2017	2013-2017	Owner	Local Authority
Aberdour Castle	12,518	13,184	14,107	15,392	19,381	54.83%	HES	Angus
Blackness Castle	15,197	16,559	21,556	30,053	42,810	181.70%	HES	Falkirk
Callendar House	36,060	32,514	45,491	34,981	51,882	43.88%	LA	Falkirk
Culloden Visitor Centre	109,063	98,780	117,814	141,776	180,875	65.84%	NTS	Highland
Culross Palace	10,446	10,669	11,556	13,112	16,022	53.38%	NTS	Fife
Dean Castle (Partly Closed)	29,827	22,806	24,767	21,778	13,541	-54.60%	LA	East Ayrshire
Doune Castle	38,081	47,069	68,518	90,279	124,341	226.52%	HES	Stirling
Glasgow Cathedral	233,172	219,947	182,205	296,062	389,101	66.87%	HES	Glasgow City
Glencoe Visitor Centre	114,284	130,006	133,444	199,327	165,303	44.64%	NTS	Highland
Highland Folk Museum	53,364	54,065	66,251	64,078	69,857	30.91%	LA	Highland
Linlithgow Palace	66,500	63,274	66,324	74,428	86,596	30.22%	HES	West Lothian
Muiravonside Country Park	No Data	117,099	124,229	132,941	146,517	25.12%	LA	Falkirk
Preston Mill & Phantassie Doocot	2,298	1,872	2,383	2,217	2,748	19.58%	NTS	East Lothian
Scottish Fisheries Museum	11,406	12,648	11,745	11,431	11,764	3.14%	CoT	Fife

HES - Historic Environment Scotland / LA - Local Authority / NTS - National Trust for Scotland / CoT - Charity or Trust

Historic Environment Scotland manage many of the heritage sites used as Outlander filming locations. They recognise Scotland's historic sites are a catalyst for economic growth. Reporting their 2018 performance, sites featured in the TV show have continued to see record-breaking numbers that year, with Blackness Castle reaching 50,000 visitors for the first time – an increase of 36% from the previous year, while Doune Castle (+14%) also experienced an increase in footfall⁸.

The Impact of Outlander on Visitor Attractions

Between 26 February 2019 and 6 March 2019, we surveyed around 500 Visitor Attractions in Scotland. We received 111 replies (around a 22% response rate). All Visitor Attractions were invited to participate, and we asked respondents:

- 1) Is the Visitor Attraction an Outlander filming location.
- 2) Is their Visitor Attraction close to an Outlander filming location, but isn't one themselves.

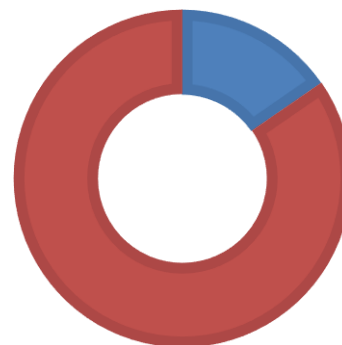
The answers provided to the survey across the range of respondents show that the majority of all attractions recognise that screen tourism is beneficial to the sector.

The benefits of being an attraction used as an Outlander location are clear with over half showing growth in new markets, products, events and interest from other media productions.

For attractions that aren't filming locations but where there is one close by, a fifth of these see an increase in visitor numbers and 5% saw interest from other media productions.

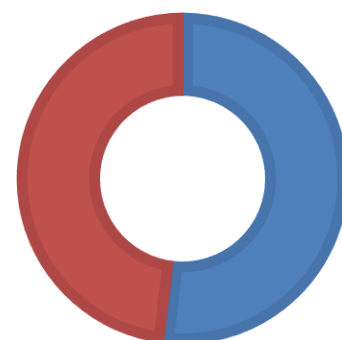
IS YOUR VISITOR ATTRACTION A FILMING LOCATION FOR OUTLANDER?

■ 15% Yes (16) ■ 85% No (88)



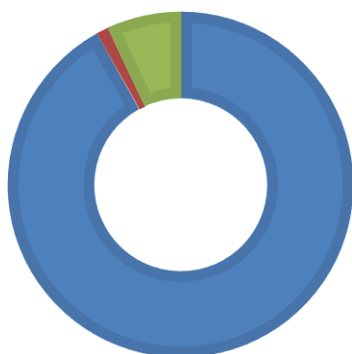
(IF NO) HAS YOUR ATTRACTION BEEN USED AS A FILMING LOCATION FOR ANY OTHER MEDIA PRODUCTIONS?

■ 52% Yes (42) ■ 48% No (39)



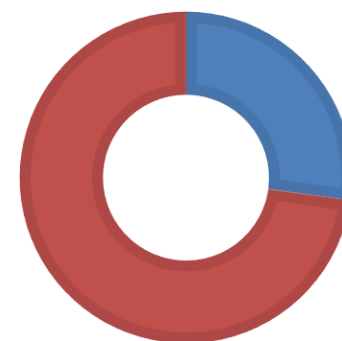
(TO ALL RESPONDENTS) DO YOU CONSIDER FILM TOURISM, POSITIVE OR NEGATIVE FOR THE SCOTTISH VISITOR ECONOMY?

■ 92% Positive (80) ■ 1% Negative (1) ■ 7% Don't Know (6)

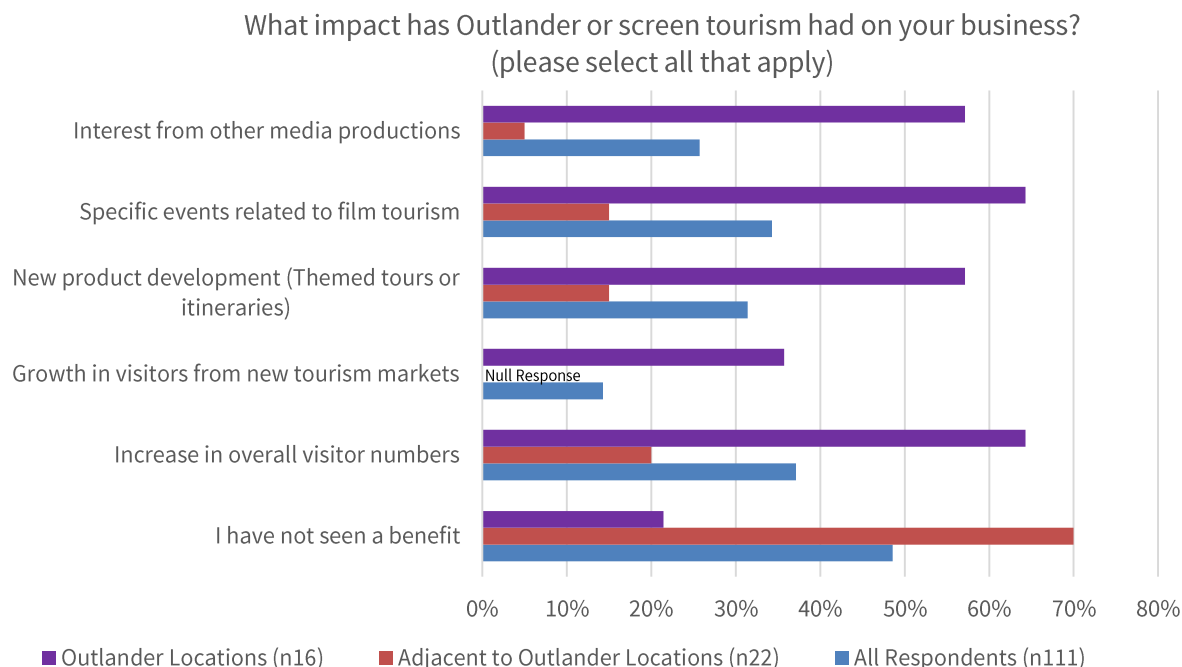


AND IS YOUR ATTRACTION LOCATED NEAR AN OUTLANDER FILMING LOCATION, BUT ISN'T A FILMING LOCATION OF ITSELF?

■ 27% Yes (22) ■ 73% No (59)



The Impact of Outlander on Visitor Attractions



The Outlander Effect is clearly evident among Visitor Attractions directly involved with the production. Among the Outlander filming location attractions the majority have seen increased visitor numbers, developed new products and themed events and had interest from other productions.

The vast majority of Visitor Attractions agree that screen tourism is beneficial and something that if the opportunity presented should be capitalised on. For attractions adjacent to Outlander locations, 15% reported developing new product development and specific events related to film tourism.

Adjacent to a filming location "This year we are extending our Jacobite exhibition in anticipation of visits from Outlander fans who have an interest in learning more about the Jacobite Movement. We have stocked our gift shop with Outlander/Jacobite products. The majority of visiting Outlander fans tend to be American/Canadian, therefore our temporary exhibition this year focuses on Scottish culture and traditions abroad, as well an emigration to North America."
Catriona Davidson, Glencoe Folk Museum

Outlander Filming Location "Regular tours are coming every Friday, Saturday and Sunday. We have developed a talk for them in the Georgian kitchen where they can hear about the filming and see the location. We have benefitted through sales in our tearoom and gift shop."
Lauren Motley, Callendar House

Certainly the comments from non-Outlander filming location attractions in the vicinity of Dean Castle see its position as an Outlander filming location a positive for them. Some see Dean Castle's closure (due to a major restoration project until 2022) potentially a challenge for the surrounding area. It is clear that screen tourism is an opportunity to engage with visitors to the area from new markets who perhaps would not have visited otherwise.

Case Study – The Tour Operator

Emma Chalmers, founder of Scottish Thistle Regional Award winning historic tour guide, Mary's Meanders, talks to us about how the *Outlander Effect* has changed their business.

What is your experience in tourism?

We originally started out as a walking tour company focusing on Linlithgow and Mary Queen of Scots. Outlander came along at an early stage of our company (2014) and we realised this was going to be big and seized the opportunity. Mary's Meanders was one of the first businesses to offer filming location tours.

How did you see the business opportunity for your product?

We spotted the filming taking place around our town and after a bit of research showed there was huge potential due to the size of the fan base. We developed our tour in consultation with the UK based fan club.

Who are your clients, where do they come from?

The majority of our clients are females, ages 45 + from America, Canada, Australia, Germany and Scandinavia. The UK market has grown over the past 12 months.

What do you see as the advantages of Film/Screen tourism?

There has been a huge drive in visitor numbers, especially to some less known locations. Outlander fans tend to return many times and it also inspires them to research their own ancestry. Our Ancestry Tours have grown year on year. Outlander fans are very evangelistic on Social Media and spread the word about good experiences they've had. It's a great form of marketing. The economic benefits from film tourism are very evident and will grow in the forthcoming years. Outlaw King and Mary Queen of Scots are adding to interest in Scotland and so we're feeling very positive about the future.



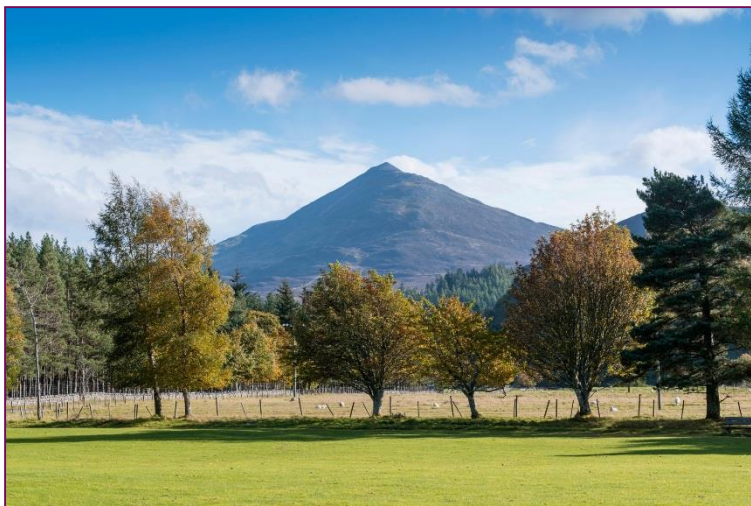
Describe a memorable moments on a tour with the fans.

Over the years we have had many memorable moments with different guests but the overriding themes that really stand out are:

Solo travellers – women who have been inspired by Outlander to get their first passport and come to Scotland. Also many friendships have been formed on our tours and have continued afterwards.

One moment last year was lovely as we had a German couple out on a tour and they were celebrating their 10th Wedding Anniversary. We decided to host a spontaneous “mock” hand-fasting ceremony in Doune Castle. It was a multi-lingual affair as we did it in French, German, Italian with the other guests participating in the ceremony.

The Impact of Outlander – The Industry's Voice



The local authorities of Fife, Perth & Kinross and the film office, TayScreen (which covers these areas, alongside Dundee and Angus) are active in supporting the filming of productions like Outlander and in the development screen tourism initiatives to enhance the visitors experience when they go to see the various locations.

Like individual attractions, the Local Authorities have observed increases in visitor numbers to a variety of locations throughout their regions. Again its an increase in visitors from France, Germany and USA. Fife Council are developing awareness amongst the regions residents to the opportunity to enjoying screen tourism. A scheme in Fife to work with local taxi drivers to develop touring routes for cruise passengers is also being developed. Perth & Kinross see demonstrable increases in visitor numbers to rural highland Perthshire. Also tangible benefits such as hosting the 3 day *Outlandish UK Gathering*⁹ in Crieff Hydro, attracting 200 delegate-fans.

Both the local authorities are aware of the benefits of screen tourism. They are seeking to develop sustainable tourism projects which allow visitors access to their regions heritage while monitoring the effect of increasing numbers of tour operators. Initiatives to manage these aspects such as pedestrian safety, extending opening hours and seasonality are all actively being investigated.

Dunalastair Estate, sits in the shadow of Schiehallion, Kinloch Rannoch and is a non-attraction based location for **Outlander**. As a self catering provider, they have noticed more foreign visitors, especially German and US compared to pre-Outlander . Their website references their Outlander association, along with regular blog updates from media outlets. Recognising that Outlander has been beneficial for the Rannoch Glen, the local tourism association is looking to work with tour companies to sustainably manage the requirements of fans with minimal disruption to the residents and farmers living and working in the area.

The Scottish Railway Preservation Society

is a charitable company responsible for the Bo'ness & Kinneil Railway. The Society has found that they get a mix of visitors, most travelling around 90 minutes to the attraction. There has been an observed increase in International visitors following the Outlander broadcasts. The station and railway are in several media productions, outside of Outlander, and it's not always obvious where the filming location is, as they may be dressed as a London-based station in the storyline. However, through social media, website and leaflets visitors can explore the screen tourism heritage of this attraction.

Talking Outlander

Out-man-der – a male fan of Outlander

Screen Tourism - Business Best Practice



- Ensure you and your staff have at least a basic knowledge of the production that took place in your local area. This could include including filming locations, plot summaries, and anecdotes so you can speak confidently to guests. Perhaps develop an FAQ handbook so staff can record questions asked and research the answers. Some attractions interviewed reported changing their guided tours to meet growing demand so that heritage tourists received the history tour and screen tourists had the location tour.



We have seen how tourism business in Scotland have benefited from screen tourism. The tips and suggestions below, gathered from our interviews and consultations with industry will allow you to take proactive steps to develop your ambitions in this growing visitor segment.

Talking Outlander

Drought-lander – is the gap between series when fans are looking for activity related to the show, such as attending related events, visiting the filming locations and researching the topics which are reflected in the show such as ancestry and heritage.

- Highlight your connections with screen tourism with potential guests, through your website, blogs, social media and newsletters. Don't forget to have your visitors tweet, post and comment on their experiences to develop those referrals and user generated content.
- If you run a visitor attraction with historic and screen tourism connections, consider how you can tell its story in an engaging and interactive way, which will really bring the story to life for ancestral visitors.
- If you are an accommodation provider, think about ways in which you could bring the screen tourism connections of your area to life for guests.
- Collaborate with similar minded businesses to set up your own screen tourism partnership. Organise themed events for fans, develop self guided tours, and knowledge base for recommendations on the best sites for guests to get their authentic experiences.

Key Takeouts:

1. Research and follow some of the avid fan groups on social media to find out what they are looking for in terms of Outlander related activities or places to visit.
2. Have a look at the variety of content at www.visitscotland.com/outlander and use links in your own communications to guests to suggest itineraries, locations to visit and further information about Scotland in relation to the series.
3. Keep an eye out for Outlander fan group visits to Scotland and see how you could help or get involved in their trip.

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Notes & Bibliography

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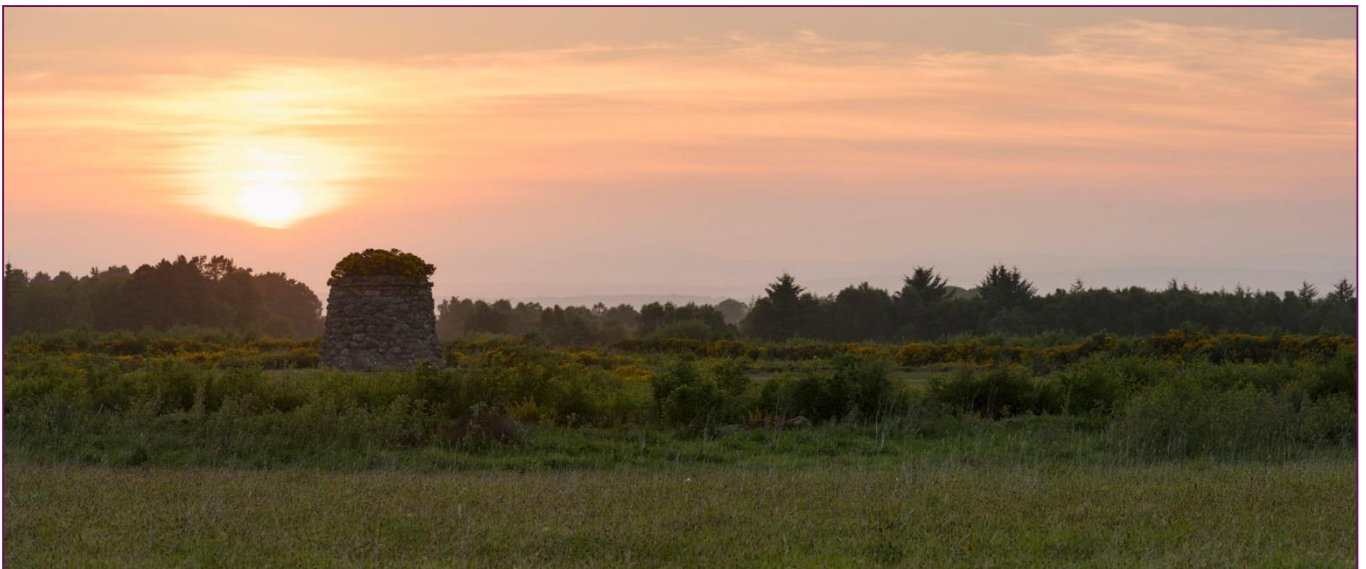
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Page 6:	Craigmillar Castle (Kenny Lam)
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