

Maximising screen tourism in Barcelona

Submitted to the Institut de
Cultura de Barcelona by
Olsberg•SPI



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1. EXECUTIVE SUMMARY

1.1. About this Report

This document presents the final results of a study, commissioned by the Institut de Cultura de Barcelona and the Barcelona Film Commission (collectively, “the Client”) and undertaken by the international creative industry strategy consultancy Olsberg•SPI (“SPI”), to assess how screen tourism can be maximised in Barcelona.

The project was undertaken in two key stages. The first stage utilised a case study approach to assess existing evidence of screen tourism into Barcelona, which also included ways in which the city is currently utilising any screen tourism opportunities. Based on these findings, and other research, the second stage of the project formulated a strategy with which screen tourism can be maximised in the city, with consideration given to both production inputs and tourism throughput.

Finally, the study outlines a bespoke model for measuring and valuing screen tourism in Barcelona – which is a key aspect of a maximisation strategy.

Figure 1 – Overview of Study Stages

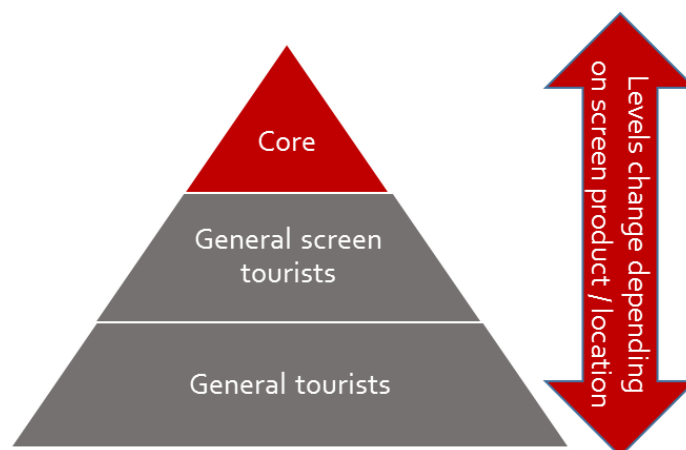


1.2. Screen Tourism and its Relevance to Barcelona

Film and television shows are potent products, able to make major cultural and audience impacts. In the digital era such impacts can be made globally in a relatively short space of time. Such screen products have been proven to be able to inspire interest in the destinations featured on screen among viewers. For some, experiencing a destination on screen can contribute to their decision to visit, while others may decide to undertake a visit to a location specifically because it was featured in a screen product. Such visitors can be described as core screen tourists.

Core screen tourists may make up a relatively small proportion of an overall tourist population, as outlined in the following figure. However, since such tourists represent wholly additional visits they are highly valuable for destinations.

Figure 2 – Overview of Screen Tourist Profile



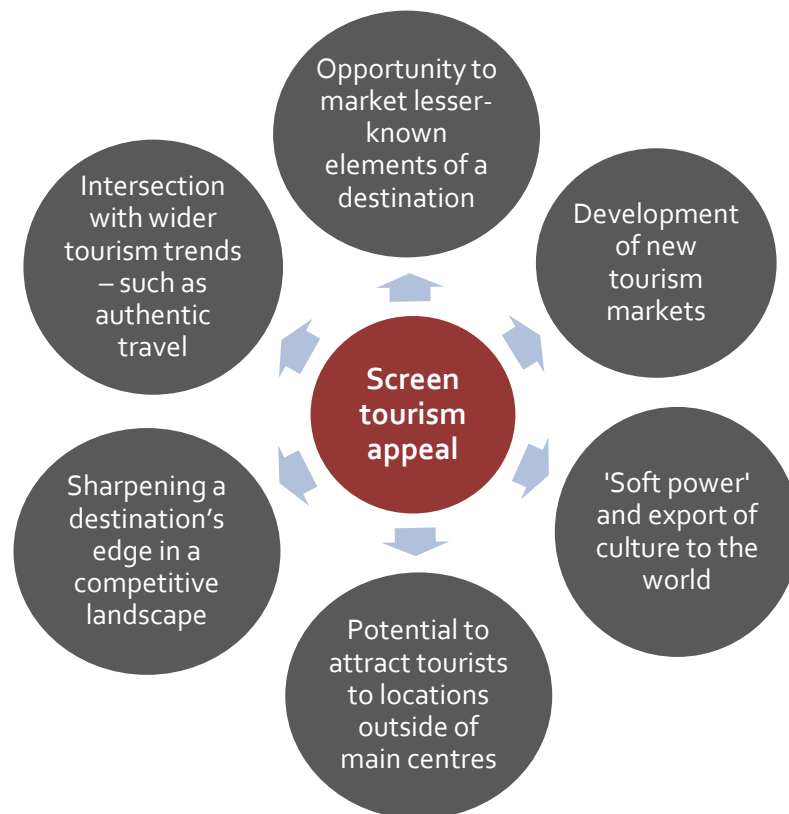
Previous work undertaken by SPI for Creative England in association with VisitEngland, estimated that the overall value of international core tourism to specific film and television locations in England,

outside of London, was worth up to £140 million (€197.8 million) in 2014. The overall value is potentially much higher if general screen tourists and visits to screen tourism destinations that have not been film locations were to be factored in.

Economic impact at individual sites can be pronounced, particularly those that have been featured in major global successes. For example Alnwick Castle in England featured as Hogwarts in the Harry Potter films and attracted £4.3 million (€5.9 million) in total from domestic and international screen tourists in 2014.

Such screen exposure can create a number of other benefits for featured destinations, including the ability to develop new tourism markets and sharpen competitiveness.

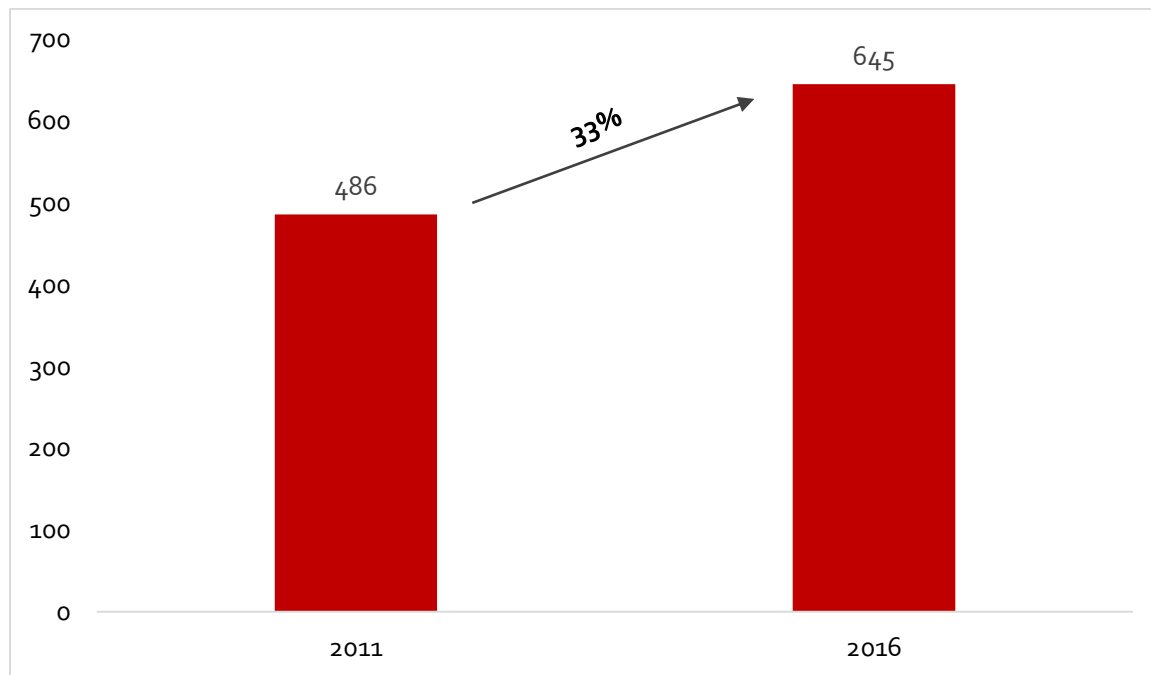
Figure 3 – Other Positive Effects of Screen Tourism



As a destination able to attract both high levels of tourism and major international film-makers, screen tourism is a highly relevant consideration for Barcelona. A strategy to maximise this area, and its positive effects, is also very timely given current debate in the city regarding the sustainability of tourism.

Moreover, the screen tourism opportunity is growing. Global consumer demand is increasing, and at the higher budget end there is extensive use of international locations. There is also a move towards franchise, or series, production in film and television – which can create very large, committed viewership.

Figure 4 – Global Consumer Spending on Film and TV, 2011-2016 (\$bn)



Adapted from *Pinewood Studios Market Review*, pwc, January 2013

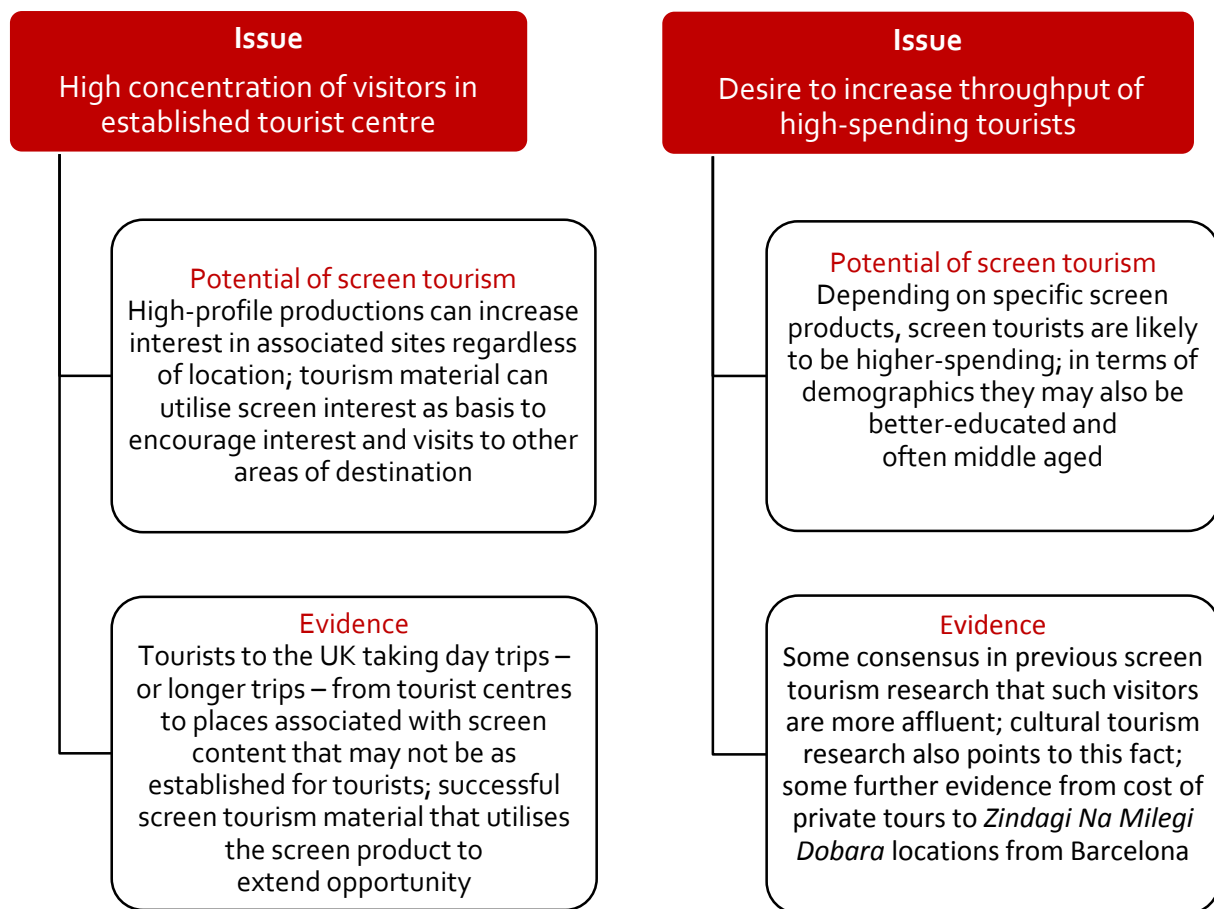
1.2.1. The potential for strategic use of the screen tourism opportunity

Barcelona's tourism sector has seen astounding growth since the early 1990s. However, the city faces a number of key tourism management and capacity issues, with a high concentration of tourism demand around Ciutat Vella in the centre of the city, and a perception of low tourism value. So pronounced are the concerns, that a one-year ban on new tourist accommodation was introduced in the summer of 2015.

There is potential, given the continued growth of high-quality international film and television in Barcelona, for the city to utilise screen tourism strategically to help alleviate these issues. Evidence from previous SPI work shows that core screen tourists are willing to travel outside of main tourist centres to visit locations, while screen tourism material in other destinations also uses interest in a screen product as a platform to promote visits to different areas.

Research also points to the fact that screen tourists can be wealthier, more educated and often middle-aged, although the demographic profile is obviously linked to specific screen products. Moreover, there is evidence that the profile of cultural tourists – of which screen tourism could be considered part, given the likely crossover between film and television and other cultural forms – are often from higher socio-economic backgrounds, and more likely to spend more while on holiday. Screen tourism therefore represents a potential opportunity for Barcelona to attract higher-value tourists.

Figure 5 – Potential Utilisation of Screen Tourism to Address Key Tourism Issues



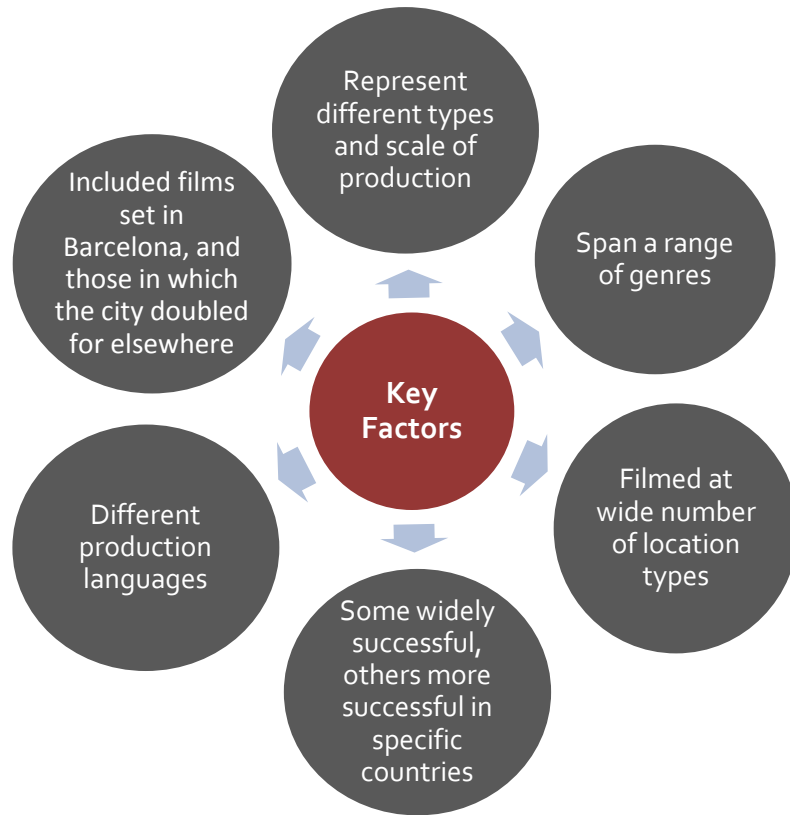
1.3. Current Levels of Screen Tourism in the City

To assess current evidence of screen tourism in Barcelona a case study approach was used. This analysed seven productions and key associated filming locations in the city. The productions were:

- *The Gunman*;
- *Los Ultimos Dias*;
- *Perfume: The Story of a Murderer*;
- *Salvador*;
- *Tengo Ganas De Ti*;
- *Vicky Cristina Barcelona*; and
- *Zindagi Na Milegi Dobara*.

These productions were selected from a longlist of projects after details discussion with the Client. Their selection was based on a number of key factors, with a view to the final study projects representing a broad range of production types.

Figure 6 – Key Factors in Selecting Projects for Study



Having selected the projects, the Study team undertook research and interviewed relevant producers and location managers to ascertain key locations for further assessment. This process resulted in the selection of a number of locations – again, with a view to covering a range of location types. The criteria and resulting locations are outlined in the following figure, with the full study methodology outlined in detail in Appendix One.

Figure 7 – Locations Selected for Study by Type



Where possible, locations or the location owner / manager were visited to assess evidence of screen tourism. This process also provided insight into how the city and individual locations currently approach screen tourism in terms of marketing, measuring and maximising any tourism opportunities.

Across the case study locations a range of impacts were detected, ranging from sites that reported an impact from screen tourism to those that reported no discernible impact.

Assessment was hampered somewhat by the fact some locations were unable to detect any effect, either because of the nature of locations (such as a busy city street) or because of the fact that no data was available. Indeed, no robust screen tourism measurement has been undertaken at city or location level in Barcelona.

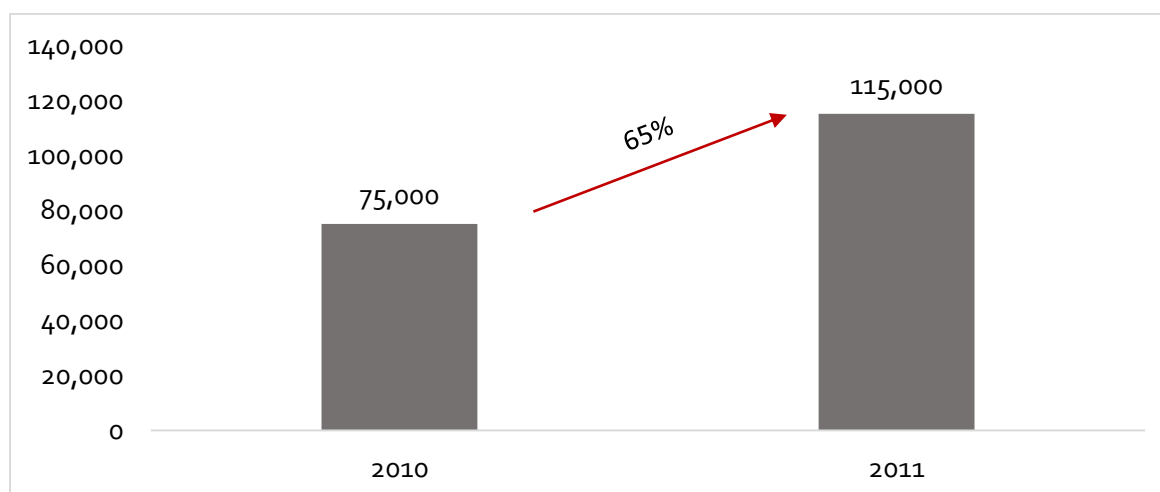
1.3.1. Impact of *Zindagi Na Milegi Dobara*

The production to have had the most impact on tourism was also the only project with robust data available relating to its tourism effects. This was the 2011 Bollywood film *Zindagi Na Milegi Dobara*, which has had a marked effect on Indian tourism to Spain.

One month after the film's release, in July 2011, visa applications to Spain reportedly doubled, with 65% growth in Indian tourism to Spain in the year of release – from 75,000 visitors in 2010 to more than 115,000 in 2011. This effect is underlined by individual Barcelona locations: Casa Fuster, where the film shot a scene in the hotel's Café Vienés, confirmed an impact on the number of Indian visitors.

The successful impact on tourism was underpinned by a deal struck with Turespaña, which contributed financial support with a co-marketing and media campaign that aimed to turn the success of the film into a 'call to action' for tourists. The promotional drive included television adverts in India.

Figure 8 – Indian Tourism to Spain in 2011, Year of *Zindagi Na Milegi Dobara*'s Release



Source: Advertising Age

The success of *Zindagi Na Milegi Dobara* underlines the potential for screen products to help increase interest from key developing tourist markets. The experiential nature of the film has been highly influential for tourists, showing them a different side to Spain and inspiring them to undertake activity-based holidays.

1.3.2. Impact of *Vicky Cristina Barcelona*

Evidence of other screen tourism impacts from other productions was largely anecdotal. While some Barcelona producers pointed to *Vicky Cristina Barcelona* having had a significant impact on overseas viewers – based on those producers' international interactions – there were no data to show this.

Some locations did describe an impact. This included La Pedrera, which reported a positive impact on visitors in the first year after release – although this level does not appear to have been sustained in subsequent years, and Casa Fuster. The latter reported an impact on tourism, particularly among visitors from the US, Japan, and France. *Els 4 Gats* pointed to the film having shot at the iconic restaurant as being of interest to visitors, but the screen link was not considered to have increased visitor numbers. This is most likely related to the restaurant's pre-existing strong appeal to tourists. Two other locations visited did not report a screen tourism impact, though this is likely related to their limited screen exposure.

1.3.3. Impact of *Salvador*

A key bar location featured in *Salvador* also reported an increase in attention after being featured in the film, though it did not experience a rise in tourist spending from this interest. The example of this film, based on the real-life story of Salvador Puig Antich, underlines the ability of film and television to increase visitor interest in Barcelona stories and their associated locations. This is particularly significant given the city's rich and unique cultural and political history.

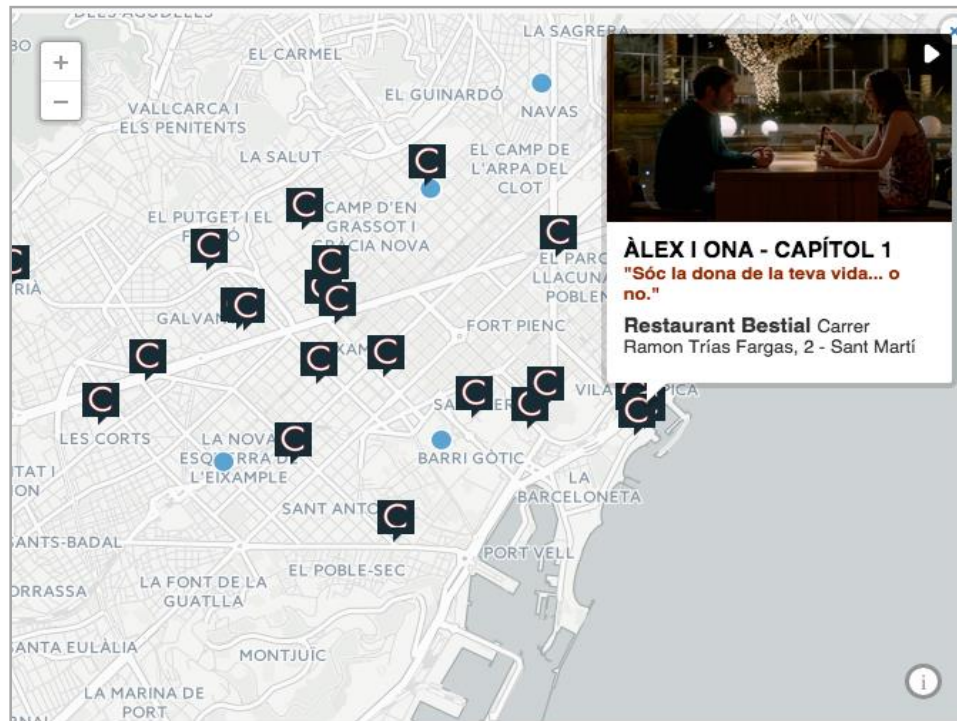
1.3.4. Impact of other screen productions

There was less evidence at other study sites (with full case study overviews in Section 3). This may be partly related to a lack of data.

Although they were not study locations, there was further anecdotal evidence from the *REC* series – which have apparently drawn screen tourists to a Barcelona apartment building – and *Cites*. This TV3 production features a wide number of locations across Barcelona, including bars and restaurants.

Particularly innovative is the fact that the show's website features an interactive map where all featured locations are included so that viewers can visit and eat the same food as the show's characters. This may include locals discovering an area or location they did not know.

Figure 9 – Locations featured in TV3 show *Cites*



1.4. A Strategy to Maximise Screen Tourism

Despite the presence of high-profile film and television in Barcelona and the potential to build screen tourism interest there has been a lack of strategy, both at individual locations and on a city-wide level.

1.4.1. Destination comparison

To inform the development of such a strategy, a comparison exercise was undertaken. This involved analysing a number of international destinations that, like Barcelona, can attract both tourism and the production of film and television. London and the UK, Paris, Rome, and Stockholm were examined, with a view to uncovering any innovative initiatives used to maximise screen tourism and to understand where tourism and production agencies work together.

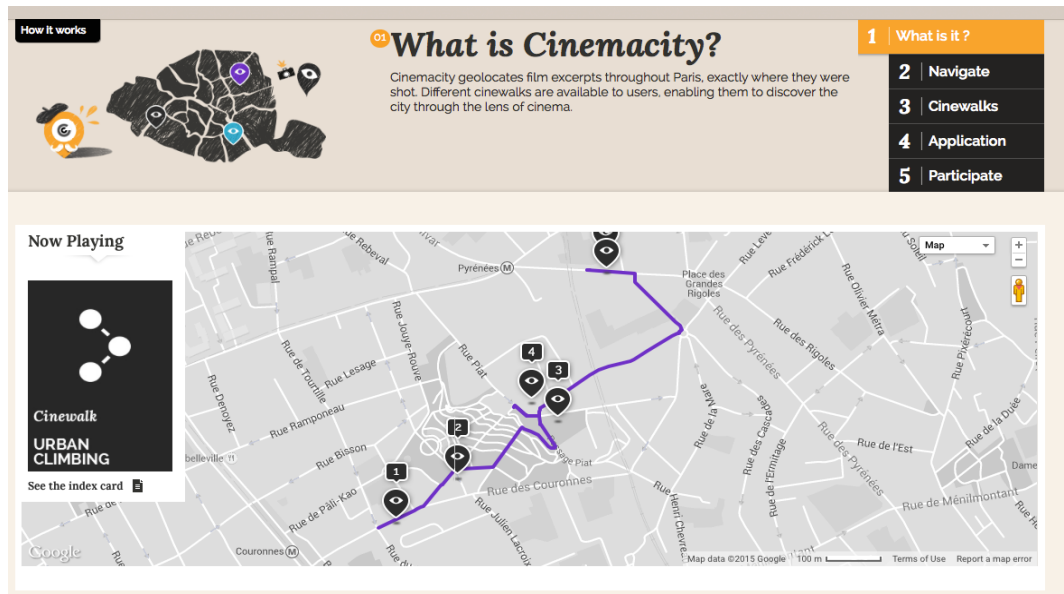
In terms of combined agency approach, the UK provided a very good example. In 2015 two key production and tourism bodies, Creative England and VisitEngland, announced a partnership with a view to integrating creative industry and tourism outputs to develop new products, as well as sharing expertise to enable innovation, skills and knowledge.

The UK government's GREAT campaign also has a relevant focus on both industrial and tourism aspects. This branding initiative promotes the UK as a place to visit, study and do business and utilises film.

Furthermore, there are also several examples of film businesses linking with public agencies to promote tourism. VisitEngland, for example, has promoted UK holidays for UK residents using Aardman characters such as Wallace and Gromit and Shaun the Sheep.

In terms of innovative tourism projects, the Cinemacity app in Paris demonstrates the potential of an interactive, digital approach to engaging with screen tourists – and how this could be used to better disperse tourists in Barcelona. The free app allows users to view film clips exactly where they were shot and offers a number of interactive 'cinewalks' through Paris, designed around geography or theme.

Figure 10 – Example of Cinemacity Cinewalk in Paris



An online film guide for visitors to Stockholm – which has seen significant tourism interest related to the *Millennium* series of books and films – also connects visitors with other aspects of the city.

In London, the 2014 Paddington Trail also provided a good model of how Barcelona might be able to leverage screen tourism to draw visitors to different parts of the city, and how film can be used to intersect with other key elements of a destination's offer – art, music, history and design, in London's case. This trail of 50 bear statues encouraged movement throughout the city (see following figure).

Figure 11 – London’s Paddington Trail, Showing Geographical Spread



1.4.2. A unified production and tourism strategy

Given the interrelation between film and television production and tourism, any strategy to maximise screen tourism should also seek to maximise throughput of the type of productions that can result in tourism.

To this end, a key point of a maximisation strategy should be closer working between key bodies overseeing tourism, production and cultural and economic development. Further integration of private sector stakeholders should also be undertaken where relevant.

Closer working would help create synergies and ensure that Barcelona does not miss out on potential projects that might have had significant economic and tourism benefits. To this end, the creation of an early warning system to flag such projects to key agencies is recommended.

Figure 12 – Overview of a Strategic Early Warning System for Projects with Potential



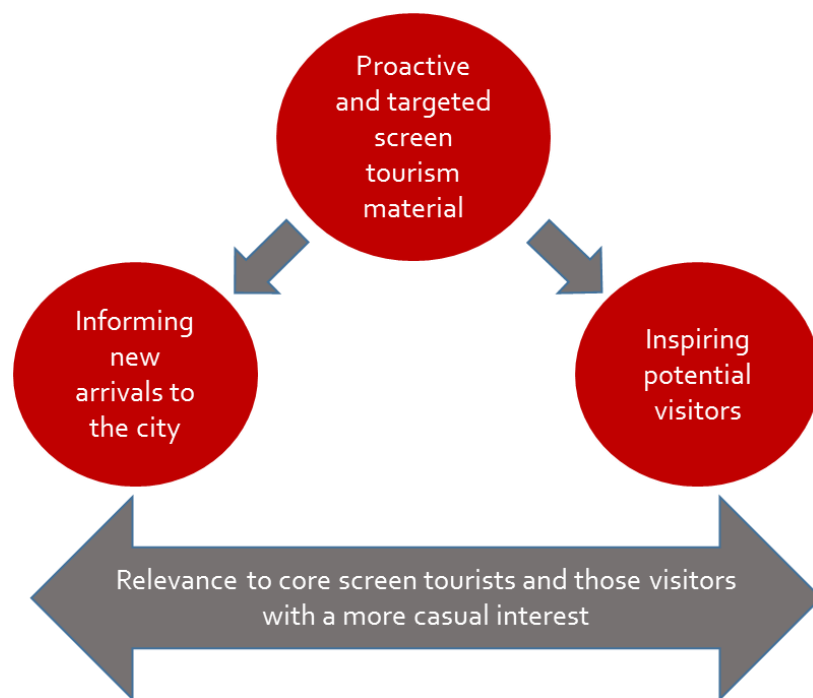
A more integrated approach would also help to better facilitate filming in the city, and also help communicate the economic benefits of hosting such productions to residents and other stakeholders. Moves to further improve film friendliness should be undertaken, recognising the fact that other destinations may be more attractive to producers because of the fact that Spain’s national filming incentive is not the most competitive. In order to sharpen its own competitive edge in this regard, Barcelona could explore the possibility of offering additional selective funding for the projects with the most potential in terms of economic impact and screen tourism.

By working together, agencies should also be able to share knowledge and innovation, and help recognise and respond to emerging screen tourism opportunities. A more proactive approach should be adopted to marketing Barcelona’s screen tourism potential, with ongoing tracking undertaken to

understand where Barcelona-shot projects are proving successful and how audiences are engaging. Viewers should be engaged by the city to help them understand Barcelona's links to such shows.

Messaging and communication are a significant part of a strategy, and better targeted material should be created of relevance both to potential international screen tourists and tourists who have already travelled to the city. Such material should also seek to further strategic priorities, such as dispersing tourism.

Figure 13 – Screen Tourism Points of Engagement for Barcelona



A strategy should also be strongly co-ordinated, and should seek to incorporate Barcelona's 10 districts with a view to better dispersing tourism and encouraging visitors to engage with other aspects of the city. Support could also be given to private businesses to help in developing screen tourism products – by, for example, circulating information on using intellectual property.

Given the current absence of data related to screen tourism, measurement should be considered a vital part of any future screen tourism strategy, both to track a base level of activity and to track the effect of the implementation of such a strategy.

As outlined in the following section data collection should also enable a robust valuation of screen tourism. Individual locations that undertake visitor surveying should also be encouraged to incorporate screen tourism questions if any high-profile productions have filmed there.

1.5. Bespoke Measurement Model for Barcelona

As part of a maximisation strategy, Barcelona should implement a measurement model to detect and value screen tourists.

Such a model should be based around incorporating additional questions to the city's existing continuous survey for incoming visitors. At a minimum these questions should seek to isolate the proportion of visitors to the city that can be considered core screen tourists – i.e. those visitors who would not have travelled to Barcelona without the link to a screen product, and those who would have travelled, but said a screen product link was the main reason. It can therefore be considered a

conservative model, since it does not factor in those tourists for whom screen exposure played a minor influencing factor. The suggested baseline questions are:

Would you have visited Barcelona if you had not been aware of its links to a screen product?

- A. Yes
- B. No

If one of the reasons for your visit to Barcelona was a screen product, how important was that link in your decision to visit?

- A. It was the main reason
- B. It was a main reason, but there were also other factors
- C. It was a secondary reason
- D. It was only a minor reason.

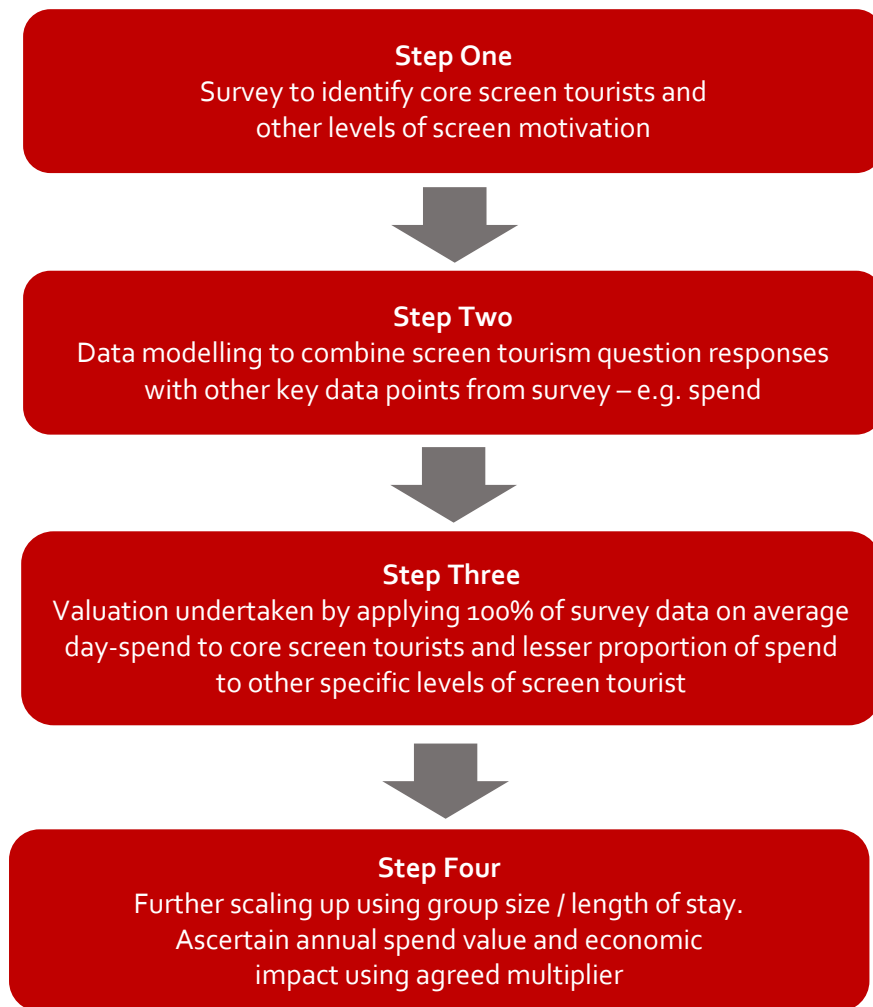
The results from this core group are then valued, by applying an average day spend figure for Barcelona tourists. To reflect the motivational levels, 100% of the value is assigned to those screen tourists who would not have visited without the screen product, and 50% to those who pointed to it being a main reason. The value can also be scaled up for group size and length of stay.

To fully depict the benefits of screen tourism, a multiplier specific to tourism in Spain can also be applied to the spend value. Such a multiplier would reflect the secondary and tertiary effects that such spend has for the economy.

Survey data on screen tourism can also be triangulated with other relevant data from existing survey questions to provide additional insight into screen tourism, such as average spend compared with other tourist types and interest in other aspects of the Barcelona offer. Moreover, additional questions can also be included to ascertain, for example, the impacts of specific productions. This could assist in pointing to the effectiveness of strategic communication efforts.

The measurement model is included in the following figure.

Figure 14 – Key Steps for a Screen Tourism Measurement Model



2. THE SCREEN TOURISM OPPORTUNITY

2.1. Introduction

Film and television productions can have powerful effects on tourism at the destinations they feature on screen, and there is now increasing recognition of the potential for screen tourism to provide destinations with a unique strategic opportunity.¹

This potential is particularly relevant for destinations that are able to attract both international tourists and international film and television productions. The prevalence of digital distribution means that such screen products can achieve huge global cultural penetration – with benefits for associated locations, which can gain profile among potential visitors with minimal investment.

A successful screen product can create a number of economic and other tourism impacts for associated locations. For example, spend can be significantly increased and the associated screen product (or products) may be attract higher-value demographics than the location has previously been able to attract. Screen products can also be highly effective channels of highlighting the unique appeal of a destination – whether reinforcing the qualities the location is known for, or shining a spotlight on lesser-known or unique aspects.

A number of countries around the world have recognised this potential, responding strategically to boost this area, through both production and tourism perspectives.

Against this backdrop the Institut de Cultura de Barcelona and the Barcelona Film Commission (collectively, “**the Client**”) initiated a study from international creative industry strategy consultancy Olsberg•SPI (“**SPI**”) to assess how the city of Barcelona can maximise screen tourism.

The Study was undertaken across two key stages. The first assesses current evidence of screen tourism in Barcelona from film and television projects that have already filmed in the city. The second utilised this evidence, and other findings, to formulate a targeted strategy for the future maximisation of screen tourism in Barcelona.

Such a project is highly relevant for the city, which is both a major international tourist destination and a location with a unique appeal to film-makers. Given current debate around the sustainability of tourism in Barcelona, strategic assessment of an area that offers the potential to diversify tourism is also very timely.

2.2. Benefits of Screen Tourism

For destinations that are able to attract a throughput of high-profile film and television production, the resulting value of screen tourism can be very significant. A 2015 SPI study on the economic contribution of the UK’s tax relief-supported screen sectors estimated that, of the £21 billion (€29.7 billion) of overseas tourism spend to the UK in 2013, £840 million (€1.2 billion) was attributable to film tourism.²

The value of tourists visiting filming locations can also be substantial. A study, undertaken by SPI for Creative England in association with VisitEngland, estimated that the overall value of international

¹ While screen tourism can also be induced by other types of content, such as a travel and food programming, this Study focuses only on feature film and television drama as these can achieve transformative international profile and have significant impacts when being produced in a country.

² *Economic Contribution of the UK’s Film, High-End TV, Video Game, and Animation Programming Sectors*, p5. Report presented to the BFI, Pinewood Shepperton plc, Ukie, the British Film Commission and Pact by Olsberg•SPI with Nordicity.

core tourism to specific film and television locations in England, outside of London, was worth up to £140 million (€197.8 million) in 2014.³

Economic impact at specific locations can be pronounced, particularly from productions with major global profile. England's Alnwick Castle, which featured as Hogwarts in the Harry Potter films, attracted £4.3 million (€5.9 million) from domestic and international tourists in 2014, while the village of Bampton in England, which features in *Downton Abbey*, attracted an estimated £2.7 million (€3.7 million).⁴

In addition to economic impact, screen exposure and resulting tourism can bring a number of other positive benefits for a destination:

- A further, unique, point of appeal in a competitive international tourism market;
- The potential to develop new international tourism markets, provided high-profile screen products that will be seen in those markets can be attracted;
- The potential to market lesser-known elements of a destination to international audiences – and possible potential visitors – including areas and destinations outside of main tourist centres;
- The ability to use screen tourism to link the destination offer to wider tourism trends, such as the desire for authenticity;
- The export, through screen exposure, of a destination's culture, people and values to international audiences. This can increase influence, understanding, and goodwill – often referred to as 'soft power'.

Screen tourism offers a new way of selling a destination to potential visitors, with minimal need for direct investment. In addition to providing a compelling reason for specific travel, screen exposure can also serve to provide profile for a destination's unique selling points. This is particularly relevant to Barcelona, which has a rich visual and cultural offer that can be portrayed on screen.

In addition, screen tourism can also help to diversify the type of visitors attracted to a destination. Different screen products will draw different demographics with varying interests and, by showcasing lesser-known locations or aspects of a place, can encourage tourists to undertake a wider range of activities in a wider range of places. (This is explored further in Section 2.8.) In this way, it also intersects with wider trends in the international tourism market, such as the desire for experiential and authentic visits.

The effects of screen exposure can also continue for many years. For example, core screen tourists are still identified at Castle Howard in England over 30 years after the original broadcast of *Brideshead Revisited* in 1981; while the Austrian city of Salzburg still attracts screen tourists because of *The Sound of Music*, released in 1965.⁵

There is also evidence that screen tourism impacts can be experienced by countries from successful productions that have been set there – even if they did not film in the destination. For example, following the Disney film *Frozen*, a 37% increase in US visitors to Norway was reported in the first three months of 2014.⁶

³ *Quantifying Film and Television Tourism in England*, p1. Olsberg•SPI report for Creative England in association with VisitEngland. 4th March 2015. <http://applications.creativeengland.co.uk/assets/public/resource/140.pdf>

⁴ *Quantifying Film and Television Tourism in England*, p29. Ibid.

⁵ *An Exploratory Study of Movie-Induced Tourism: A Case of the Movie The Sound of Music and Its Locations in Salzburg, Austria*. Holly Hyunjung Im and Kaye Chon. *Journal of Travel & Tourism Marketing*, 24 (2-3), 229-238, 2008.

⁶ *Disney makes Norway a hot destination*. *The Times*, 2nd June, 2014.

2.2.1. Rising production and consumption of screen products

The potency of the screen tourism opportunity from current productions is underpinned both by rising film and television production levels, and by increasing global consumption of film and television.

Europe, for example, has seen a 7% rise in the total number of feature films produced by the 28 European Union Member States over the last five years, rising from 1,499 in 2010 to 1,603 in 2014.⁷ While the number of US films produced overall declined by 11% over the same period, from 795 in 2010 to 707 in 2014, the number of productions from the major Hollywood Studios that are members of the Motion Picture Association of America reached a four-year high in 2014, with 110 productions.⁸

This high-value sector of the industry has seen a trend towards rising budget levels and, for certain major projects, the voracious use of global international locations as producers seek to provide the most distinctive, impactful screen experience for audiences. Productions like *Star Wars: Episode VII – The Force Awakens* and *Game of Thrones* are produced in a host of global locations. Given the wide international audience base for such productions the potential for screen tourism is clear.

Worldwide demand for screen content is also increasing, with global filmed entertainment revenue projected to rise at a compound annual growth rate of 4.1% between 2014 and 2019, to reach \$104.6 billion. Such growth is driven, in part, by rising markets such as China, Brazil and Argentina.⁹

The growth in filmed entertainment consumption correlates with projected growth in the global tourism market. According to the World Tourism Organization, the number of international tourist arrivals worldwide is projected to rise by an average of 3.3% per year between 2010 and 2030.¹⁰

2.3. Profiling Screen Tourists

Screen products can have a range of motivational effects on a tourist's decision to visit a destination. This includes tourists who will undertake a trip specifically to visit a filming location, to those for whom a destination's screen links will be a contributing – but not decisive – factor in their decision to visit.

SPI generally identifies two key motivational types of screen tourist, as outlined in Figure 15. Core screen tourists are those visitors who would not have visited without the screen exposure, and therefore represent entirely additional spend for a destination that would not have otherwise occurred. General screen tourists are visitors who would have travelled to the destination, but for whom a link with a screen product has contributed to their decision to visit. Within the latter group, a further range of motivational levels can be identified, with the screen link ranging from being a minor to a major contributing factor. Such differing levels can be defined when undertaking surveys to assess value.

General tourists are those visitors to a destination for whom a screen product has played no part. The precise proportions of these groups will differ depending on the specific appeal of each screen product and location.

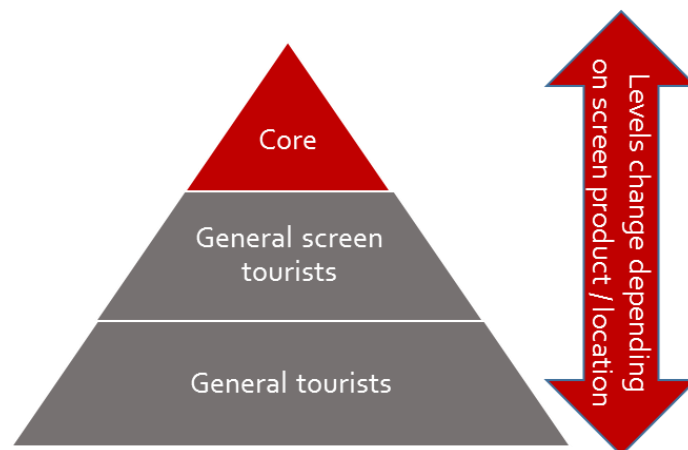
⁷ Focus – World Film Market Trends. Marché du Film, 2015.

⁸ *Theatrical Market Statistics 2014*. Motion Picture Association of America. Note: 2014 statistics are provisional.

⁹ Global entertainment and media outlook, 2015-2019. PwC, Ovum. Data accessed at <http://www.pwc.com/gx/en/global-entertainment-media-outlook/assets/2015/filmed-entertainment-key-insights-1-growth-around-the-world.pdf>

¹⁰ *Towards Tourism 2030 Global Overview*, p10. World Tourism Organization (UNWTO) 2011.

Figure 15 – Overview of Screen Tourist Profile



Clearly, the population of screen tourists at a specific destination will differ in close relation to the specific appeal of the underlying screen product, as well as elements of the destination's appeal.

2.4. The Challenges of Measurement, Valuation and Strategy

Given the wide range of motivations that screen tourists can exhibit, robust measurement of the effects can be particularly challenging.

To accurately value screen tourism effects, these motivational values should be assigned a proportion of the day spend rates with which tourists are generally valued. Previous valuation work by SPI in this area assigned 100% of the spend value of core screen tourists and 50% of the value of those screen tourists who would have visited, but said that the screen link was the main factor.¹¹

The motivational range of screen tourists is also a key consideration when creating strategies to maximise impact. Given the wide range of interest, such strategies should therefore be multi-faceted and developed in response to potential levels of screen tourist interest. For destinations with a mixed appeal to core and general screen tourists alike, provision should be given to those who will be visiting specifically because of the screen link, while also ensuring that more casual screen tourists are catered for.

2.5. Barcelona as a Location for Film and Television Production

Screen tourism is highly relevant for Barcelona, a city with a unique appeal for film-makers. The city offers a huge diversity of locations, from atmospheric Gothic architecture to modern skyscrapers, dramatic mountains to coastline.

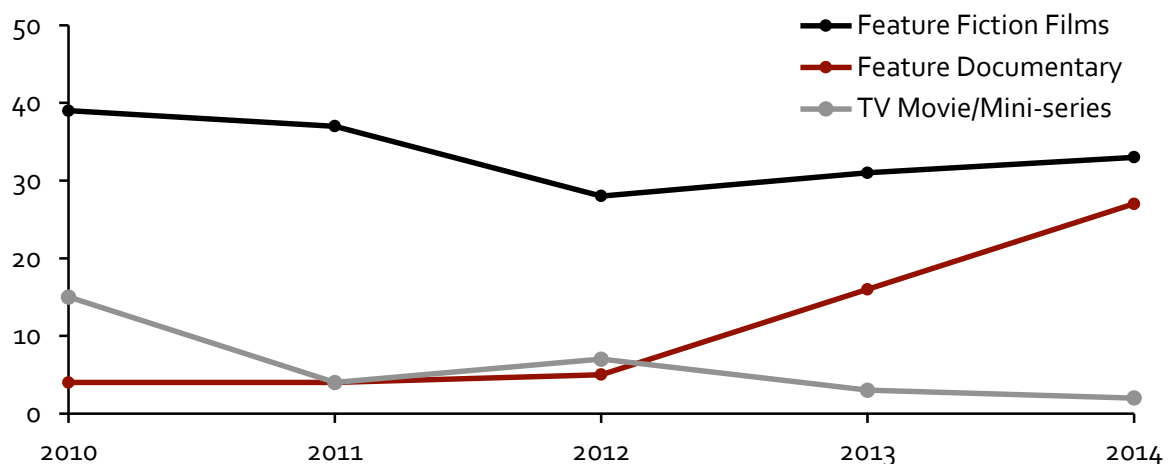
Despite this offer, however, Barcelona's throughput could be considered relatively modest. For example, Barcelona hosted 33 fiction features in 2014 compared with 106 in Paris.^{12 13} Much of the city's throughput is from commercials and entertainment shows, which are significantly less effective than film and television in attracting screen tourism.

¹¹ *Quantifying Film and Television Tourism in England*, p50. Ibid.

¹² *Balanç Anual 2014 - Informe de L'activitat filmica a Barcelona*, p.4. Barcelona Film Commission.

¹³ 930 tournages à Paris en 2014. ParisFilm, 18th February, 2015. <http://www.parisfilm.fr/fr/actualites/930-tournages-paris-2014,49.html>

Figure 16 – Volume of Key Production Types in Barcelona, 2010-2014



Source: Barcelona Film Commission

Barcelona is able to attract some major international productions, such as Sky Italia series *Gomorra*, *All I See Is You*, from *World War Z* director Marc Forster, and NBC series *American Odyssey*. However, the city is unable to maintain a regular throughput of such projects and has not been able to attract a major international television series or film to set up in Barcelona for a significant amount of shooting over many months.

This is due to a number of factors, including the fact that the national Spanish incentive is not as competitive as those on offer in other countries and the fact that Barcelona does not have a major, dedicated shooting space.

In order to maximise both screen tourism and production in Barcelona, the city should therefore seek to improve aspects that are within its control through the implementation of a strategy that unifies both areas. See Section 4.3.

2.6. The Expansion of Barcelona as a Global Tourist Destination

Since the 1992 Olympic Games, Barcelona has undergone significant and transformative growth as a tourist destination of international renown and appeal. According to Barcelona Turisme, the city attracted 7.9 million tourists in 2014, a rise of 355% in since 1990 (Figure 17).¹⁴ In 2014, Barcelona was the sixth top-performing European city in terms of tourist numbers, with 7.9 million in total – behind Madrid, Rome, Berlin, Paris, and London.¹⁵

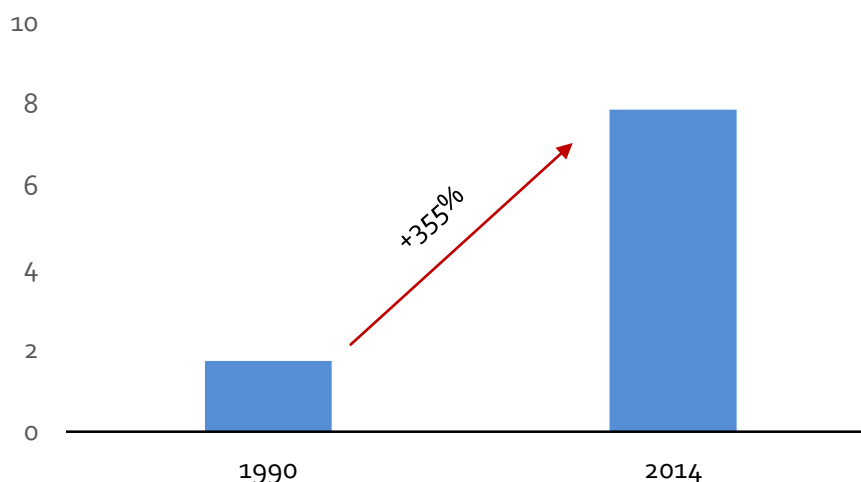
Tourism is now a key sector in Barcelona, with a 2012 analysis showing that more than 120,000 people were employed by tourism, with the economic impact of tourism valued at €25 million a day.¹⁶

¹⁴ *Tourism statistics in Barcelona and regions – Synthesis 2014*, p9. Barcelona Turisme. June 2015.

¹⁵ *Ibid*, p19.

¹⁶ *Barcelona Tourism Statistics*, p9. Barcelona Turisme. 2013

Figure 17 – Growth in Annual Tourist Numbers to Barcelona, 1990-2014



Source: *Tourism statistics in Barcelona and regions – Synthesis 2014. Ibid.*

2.7. The Challenges of Tourism Growth

The pronounced growth of Barcelona has, however, created some issues for the city and its residents. Despite the high volume of visitors there is a perception that a significant proportion of are low-value visitors, with tourists staying for a relatively short amount of time. In 2014 the average hotel stay was 2.17 nights per visitor.¹⁷

Moreover, the high concentration of visitors in the centre of the city around Ciutat Vella creates particular tourism management issues. While 91.6% of Barcelona residents think that tourism is beneficial for the city, 39.2% believe that the city is reaching the limit of its ability to provide services to tourists.¹⁸

The issues regarding tourism levels in Barcelona led to the announcement, in July 2015, of a one-year ban on new tourist accommodation, with the city making clear that no new tourist accommodation would be granted a licence over the next year.¹⁹

In an interview with *El Pais*, city mayor Ada Colau underlined the need for a tourism plan that considers local residents and also the potential to limit tourist numbers: "We need to look at it very seriously. When I talk about a strategic plan, created with all of the protagonists, we should be talking about looking at the saturation limit, because there will be one. If we don't want to end up like Venice, we will have to put some kind of limit in Barcelona. We can grow more, but I don't know how much more."²⁰

¹⁷ *Tourism statistics in Barcelona and regions – Synthesis 2014, pg. Ibid.*

¹⁸ *Percepció del turisme a Barcelona*. Results presentation, Ajuntament de Barcelona. 23-30 March, 2015.

¹⁹ *Barcelona mayor introduces one-year ban on new tourist accommodation*. *El Pais*, 2nd July, 2015. http://elpais.com/elpais/2015/07/02/inenglish/1435828213_655223.html

²⁰ 'If we have to disobey unfair laws, they should be disobeyed.' Ada Colau interview in *El Pais*, 1st June, 2015. http://elpais.com/elpais/2015/06/01/inenglish/1433146048_032174.html

2.8. Potential to Improve Tourism in the City

There are clear concerns in Barcelona regarding saturation of tourism levels and sustainability and any strategy to maximise screen tourism should closely consider these issues. It is notable that a maximisation strategy in fact offers the potential to target certain tourism objectives that would be of distinct benefit for the city – specifically with regards to increasing the quality and geographical diversity of tourism throughput.

2.8.1. Increased spend and diversity

There is a perception in Barcelona that a degree of the tourism drawn to the city is low spending. Screen tourism offers Barcelona the potential to attract higher-quality tourism, with visitors who will spend more money.

Previous research points to the fact that “there appears to be some agreement that film tourists tend to be more educated, affluent and often middle-aged”.²¹ For example, a survey of visitors to Notting Hill in London, undertaken to ascertain the effect of the film of the same name on visits, found that most respondents had a higher disposable income than normal. While this figure relates to the entire survey population the study found that 5.3% of respondents were induced to visit the area because they had seen the film. The survey also found that 55.3% of visitors had seen *Notting Hill*.²²

Meanwhile, a study on the motivations of Thai tourists visiting Korea found that 10.5% of respondents were ‘specific film tourists’ with 19.5% as ‘general film tourists’.²³ The study found that females had higher travel motivation associated with screen tourism.²⁴

While there has been limited demographic assessment of screen tourists, there has been some profile work undertaken around cultural tourism – of which screen tourism could be considered part. This posits that cultural tourists are often from higher socio-economic backgrounds and are more likely to spend more while on holiday.²⁵

An example of the potential for high spending related to screen tourism can be seen in the cost of private day tours offered by Barcelona Beach Tours linked to the Bollywood film *Zindagi Na Milegi Dobara*: for up to four people, the tour alone costs €356.²⁶

2.8.2. Wider dispersal of tourists throughout the city

A significant volume of tourism to Barcelona is concentrated around the centre of Barcelona, in Ciutat Vella, with the city keen to encourage a wider geographical spread of tourism. Indeed, the City of Barcelona’s strategic plan for 2010-2015 underlined the importance of the city’s various

²¹ *Film tourism - Evolution, progress and prospects*, p.1016. Joanna Connell, Tourism Management, 2012.

²² *Movie Induced Tourism: The Challenge of Measurement and Other Issues*, p. 327-328. Graham Busby and Julia Klug, *Journal of Vacation Marketing*, 2001

²³ *Applying a mixed method of quantitative and qualitative design in explaining the travel motivation of film tourists in visiting a film-shooting destination*, p136. Bongkosh Rittichainuwat, Suphaporn Rattanaphinanchai, *Tourism Management*, 2015. Note, the tourist definitions presented in this study are as proposed by Macionis (2004).

²⁴ *Ibid*, 142.

²⁵ *Production and consumption of European cultural tourism*, G. Richards, *Annals of Tourism Research*, 1996 (as cited in Busby and Klug, 2001).

²⁶ http://barcelonabeachtours.com/m1_movie_zindagi_na_milegi_nobara_beach_tour_costa_brava.html

neighbourhoods and stated: “The real city, its identity and dynamism form the basis of its appeal and there is no room for “ghettos” or neighbourhoods that cater exclusively to tourists.”²⁷

To this end, screen products can provide compelling reasons for visitors to travel outside of tourist centres, helping disperse tourism away from such tourism hubs. It has been noted that existing locations or buildings can suddenly acquire status and attract tourists when featured in popular culture and because of their association with celebrities.²⁸

The potential of screen tourism to encourage visits outside of the city centre can be seen in the excursions offered by Barcelona Beach Tours, which enable tourists to visit the locations from *Zindagi Na Milegi Dobara* in Costa Brava, Lloret de Mar and Blanes, as well as the village and castle of Tossa de Mar. Anecdotaly, the Turó de la Rovira viewpoint has also attracted screen tourists to see the location, which was featured in *Tengo Ganas De Ti*.

Of course, the effectiveness of screen tourism in attracting visitors to different parts of the city depends on a throughput of high profile film and television productions utilising locations around the city. While the architecture of Ciutat Vella does remain a key draw for film-makers Barcelona does offer a particularly rich and diverse locations offer, with highly attractive sites across the city. Many of these have not been over-used on screen, and discussions with producers revealed a number of such locations, including Tibidabo and Parc del Laberint d'Horta.

The Barcelona Film Commission and the city's locations managers and scouts are very knowledgeable about the range of sites available and incoming film-makers should continue to be encouraged to consider sites around the city – even if many incoming film-makers are particularly interested in the Gothic Quarter.

Importantly, screen tourism can also be utilised as a tool to disperse tourists around a city, even without specific locations having been used on screen. For example, the highly successful Paddington Trail, created in London in 2014 to tie in with the release of the film, created a circuit of 50 statues that tourists could visit; these were located all across the city, encouraging movement throughout (See Section 4.2.1).²⁹

The Paddington Trail also used the film as a way of linking to London's wider visitor appeal – including art, music, history and design – with statues designed by celebrities and placed in locations of interest unrelated to film, such as museums and attractions.

Maps and guidebooks – distributed via a number of methods, such as print, online or via apps – are a commonly used way to engage with screen tourists and offer information on a variety of locations. One of the earliest movie maps was created by the British Tourist Authority in the 1990s and portrayed 60 years of British film and TV. A subsequent study showed that 46% of respondents took a short trip after receiving the map at home, 43% used the map to plan the trip and 87% visited new areas.³⁰

²⁷ *City of Barcelona Tourism Strategic Plan*, p26-27. Ajuntament de Barcelona, Barcelona Turisme. Municipal Plenary Council, 29th October 2010.

²⁸ Peter Schofield, 1996 (as cited in *Film-induced Tourism*, p.29, Sue Beeton, Channel View Publications, 2005).

²⁹ The 50 locations can be seen at *Join the London Paddington Bear hunt*, The Telegraph, 1st November, 2014. Accessed at <http://www.telegraph.co.uk/culture/film/11198992/Join-the-London-Paddington-Bear-hunt.html>

³⁰ *Set Jetting (2007)* a report by Mintel Oxygen as referenced in *EuroScreen EuroScreen: Capitalising on Screen Tourism* Maria Mansson & Lena Eskilsson.

Given Barcelona's strong underlying cultural and historical offer, the development of targeted tourist products that integrate overlapping elements of the city's appeal could seek to achieve similar movement of visitors, both geographically and in terms of cultural areas. Data from La Pedrera – the ninth most visited site in Barcelona, with 0.9 million visitors in 2014 – underlines this potential, with 53% of visitors interested in also visiting other cultural attractions while in Barcelona.

2.8.3. Longer and repeat visits

Barcelona is able to attract a significant proportion of repeat visitors, with 50.4% visiting for a second or third time (or more) in 2014.³¹ The city's rich and varied visitor offer encourages such repeat visits, and screen tourism provides additional strength in this area. For some tourists, screen products can offer a unique reason to visit the city, even if they have visited before. Indeed, a throughput of production can create a continuation of appeal and profile.

Screen tourism can extend the destination life cycle as new attractions are added to the location, in addition to prolonging the tourist season – since screen tourism is not dependent on a specific season.³²

Even where specific screen tourism visits are not undertaken, screen exposure may provide previous visitors of the city with powerful reminders of its unique appeal, or highlight elements of the city they may not have experienced before. Again, a strong throughput of production will increase the chances of this.

³¹ *Tourism statistics in Barcelona and regions – Synthesis*. Pg. Ibid.

³² *Euroscreen: Capitalising on Screen Tourism* p.15 Maria Mansson & Lena Eskilsson.

3. BENCHMARKING CURRENT LEVELS OF SCREEN TOURISM IN BARCELONA

3.1. Assessing Evidence of Screen Tourism

The first stage of this Study involved assessing the existing evidence of screen tourism in Barcelona. This process involved undertaking detailed case studies of a number of major productions and key associated locations. In addition to gauging current levels of screen tourism, it also provided important insight into how the city and individual locations currently approach screen tourism, particularly with regards to data tracking and tourism maximisation.

3.2. Project and Location Choice

Case studies were selected after detailed analysis and in discussion with the Client. As outlined in the Methodology (see Section 6.6), projects were chosen for a number of reasons, including that they represented different types of productions, had collectively filmed at a wide number of locations across the city, represented different production languages, and included projects set in Barcelona and those in which the city doubled for elsewhere. The seven projects were:

- *The Gunman*;
- *Los Ultimos Dias*;
- *Perfume: The Story of a Murderer*;
- *Salvador*;
- *Tengo Ganas De Ti*;
- *Vicky Cristina Barcelona*;
- *Zindagi Na Milegi Dobara*.

A range of key Barcelona locations were then identified for each screen production, in consultation where possible with relevant producers and location managers. The final list of study locations was developed to ensure evidence was assessed at different location types. These sites included:

- Iconic Barcelona attractions, such as Park Güell and La Pedrera;
- Hotels, restaurants, and bars, including Casa Fuster, Els 4 Gats and Bar Funicular;
- Private and publicly-owned sites;
- Museums and galleries such as Fundació Joan Miró and Museu Nacional d'Art de Catalunya;
- Sites outside the tourist centre, including Parc del Laberint d'Horta and Tibidabo Amusement Park.

3.3. Overview of Case Studies

Assessment of case studies suggested that Barcelona has experienced a range of screen tourism effects from the productions it has hosted to date – from sites reporting a clear upturn in visitors after screen exposure, to sites reporting no discernible effects on volume.

Case study assessment was somewhat hampered by the fact most sites had no robust way of measuring or assessing the impact of screen exposure on tourists. While the city undertakes a continuous survey that questions incoming tourists on their reasons for visiting Barcelona, there are no specific screen tourism questions included on this (although a model for assessing screen tourism using this survey is outlined in Section 5).

The case studies therefore present anecdotal evidence – though the nature of some sites meant that owners or managers were not able to discern whether there had been any impact or not. Despite the lack of robust measurement tools, there is some clear impact evidence, particularly with hits such as *Zindagi Na Milegi Dobara* and *Vicky Cristina Barcelona*. Some of this evidence, however, is anecdotal.

For example, while the tourism impact of *Vicky Cristina Barcelona* on the city has not been measured, several producer consultees pointed to the film as having had a substantial effect on tourism to the city, based on their international interactions.

The case study process also underlines the fact that the maximisation of screen tourism has been very limited in Barcelona to date, both at a city level and at individual locations. For example, while *Vicky Cristina Barcelona* provided a major international platform for the city, it would appear that little maximisation was been undertaken – despite the city’s investment in the film.

There was also limited evidence of individual sites using screen links to engage with tourists or to develop new products – although there are examples of third-party operators responding to demand with film-related tours of Barcelona.

The results of case study assessment at key individual sites are outlined in the following sections.

3.3.1. *Perfume: The Story of a Murderer*

Overview

This 2006 English-language feature film was set in 18th-century France and shot extensively in Barcelona, despite not being set in the city. *Perfume* made substantial use of Barcelona locations, including the Gothic quarter, Poble Espanyol, Plaça de la Mercè, Parc del Laberint d'Horta and Plaça Reial. It also shot in Figueres and Girona, doubling for Grasse in France. A major driver for the production coming to Barcelona were locations in the city and the surroundings. *Perfume* attained worldwide box office of \$135 million, with particular success in Germany, also performing well in Russia and South Korea.

Table 1 – Top Five Global Theatrical Markets for *Perfume: The Story of a Murderer*

Market	Box office (m)
1. Germany	\$53
2. Spain	\$9.9
3. Russia	\$9.2
4. South Korea	\$6.2
5. France	\$6.1

Source: Boxofficemojo.com

Impact

Consultations were undertaken with the producer and the Horta-Guinardó district, in which the Parc del Laberint location is situated. However, there was no quantifiable screen tourism impact, although a level of tourist interest is indicated by the fact that *Perfume* locations were included on a previously operational Barcelona: the Movie Walking Tour offered by Icono Serveis Culturals.³³

³³ As detailed on Icono Serveis Culturals webpage:
<http://www.iconoserveis.com/english/detail.php?q=3&tipo=rutas>

3.3.2. *Salvador*

Overview

Based on a true story, this drama was directed by Manuel Hueriga and stars Daniel Brühl as anarchist Salvador Puig Antich. Released in 2006, *Salvador* was filmed at a number of locations, including the Modelo prison, Plaça de la Universitat, and Funicular Bar in Eixample – where actual events depicted in the film occurred. Screened at the Cannes Film Festival in 2006, *Salvador* won a Goya Award for best adapted screenplay and was nominated for another 10 awards. Spain was its most successful market.

Impact

Bar Funicular was visited in order to ascertain impact. This privately-owned bar played a central role in the real-life story of Salvador Puig Antich and also hosted extensive filming. The business does attract visitors because of the events that took place there including, for a time, a regular tour of anarchist locations.

The location also reported that *Salvador* helped raise the profile of the story again among visitors, although it did not experience a resulting rise in spending from the additional interest. Nevertheless, this underlines the potential for film and television to add profile to such stories, creating additional interest among visitors. This is particularly relevant for Barcelona, which has a rich and unique political and cultural history.

3.3.3. *Vicky Cristina Barcelona*

Overview

This high-profile romantic comedy drama shot in Barcelona in 2008 and, as the title suggests, featured the city extensively – both visually and thematically. The film made use of many locations around Barcelona, including iconic sites like Park Güell, La Rambla and La Pedrera, as well as hotels and restaurants like Els 4 Gats, Casa Fuster and Bar Marsella. It also made use of lesser-utilised filming destinations, such as Tibidabo Amusement Park.

Vicky Cristina Barcelona achieved wide international profile, featuring major global stars Scarlett Johansson, Penelope Cruz, and Javier Bardem. It premiered at the Cannes Film Festival in 2008, won an Oscar, a Bafta, and more than 30 other awards. It was also critically acclaimed. The film had significant worldwide distribution, with a global box office of \$96 million. It performed most strongly in the US and Europe, with a strong showing in Spain

Table 2 – Top Five Global Theatrical Markets for *Vicky Cristina Barcelona*

Market	Box office (m)
1. The US	\$23.2
2. France	\$15
3. Spain	\$9.8
4. Italy	\$8.1
5. Germany	\$5.5

Source: Boxofficemojo.com

Impact

A number of Barcelona locations used in *Vicky Cristina Barcelona* were visited as part of this Study, including Els 4 Gats, Fundació Joan Miró, La Pedrera and Museu Nacional d'Art de Catalunya. None were able to provide data relating to impact of filming on tourism. However, some were able to point to anecdotal evidence of impact. La Pedrera, for example, reported a positive impact on visitors in the first year after release, although this level does not appear to have been sustained in subsequent years. The site, which has also appeared in such films as Michelangelo Antonioni's *The Passenger*, does not have visitor data related to the time of the film's release. While it does undertake a continuous visitor survey, this began in 2008 and does not ask about film and television as a motivation for visitors.

Screen tourism effects have also been experienced by Casa Fuster, particularly among visitors from the US, Japan, and France. Visitors to Els 4 Gats ask about the filming and there is a picture of Scarlett Johansson and Rebecca Hall on the wall near to where they were filmed during their scene in the restaurant. However, screen link is considered a complementary factor by this iconic Barcelona restaurant and is not felt to have increased visitor numbers.

Screen tourism Impacts were not experienced at Museu Nacional d'Art de Catalunya and Fundació Joan Miró, although this likely reflects the relatively low profile both sites have on screen in the film, with limited amounts of filming taking place there. This points to the need for extended screen exposure, or for a location to be featured in a story to have an impact, as well as the need for ongoing effort to maintain a screen tourism message.

The study sites all have underlying, major appeal to tourists, with the film link acting as an additional factor in visits, rather than a standalone draw. This underlines the ability of screen tourism to intersect with a wider cultural tourism offer, which would be particularly relevant to Barcelona, given its profile as a cultural destination. Indeed, *Vicky Cristina Barcelona* would be an ideal vehicle for such promotion, considering the fact the characters in the film spend time visiting a range of cultural sites.

While the city of Barcelona invested in the production, there did not appear to be any screen tourism strategy to benefit from this, explore promotional opportunities, or collect impact data.

Barcelona producers consulted during the Study did point to an impact from *Vicky Cristina Barcelona* in driving visits to the city based on their international interactions.

Finally, it is notable that the amount of publicity generated locally by the film's production also seemed to have played a factor in visits. An interesting impact is that the film itself is not the only channel of impact: Woody Allen's jazz concerts at Casa Fuster during production were apparently particular drivers for locals to visit the hotel.

3.3.4. *Zindagi Na Milegi Dobara*

Overview

This Indian coming-of-age comedy, directed by Zoya Akhtar, follows three friends on a bachelor road-trip to Spain. Featuring an ensemble cast of major Indian stars, Barcelona is a key location, alongside other parts of Spain such as Pamplona, Seville and Valencia.

The film was shot in 2010 at locations in the city including Casa Fuster, as well as Sagrada Família, Barcelona streets and regional beaches. It aimed, in its approach to Barcelona, to go beyond the typical locations and present a different side to the city.

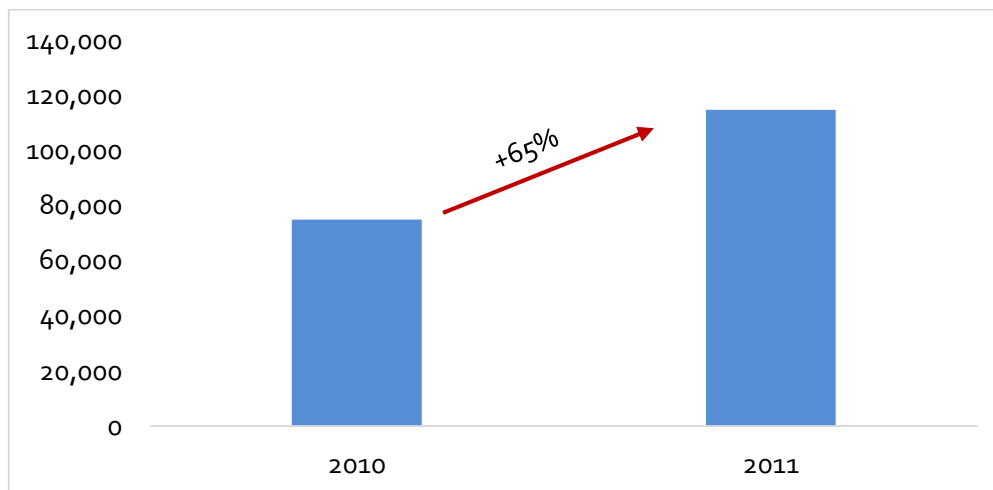
Zindagi Na Milegi Dobara was a significant hit in India, where it was one of the biggest releases of 2011 and made a substantial cultural impact. The film achieved \$24 million at the worldwide box office.

Impact

Bollywood films can be highly impactful for screen tourism and the success of *Zindagi Na Milegi Dobara* in India has had a marked effect on tourism levels to Barcelona from India – a key tourism growth market – and the Indian diaspora.

One month after the film's release, in July 2011, visa applications to Spain reportedly doubled, with 65% growth in Indian tourism to Spain in the year of release – from 75,000 visitors in 2010 to more than 115,000 in 2011.³⁴

Figure 18 – Indian tourism to Spain in 2011, the year of *Zindagi Na Milegi Dobara*'s release



Source: Advertising Age

Casa Fuster, where the film shot a scene in the hotel's Café Vienés, also confirms an impact on the number of Indian visitors. The screen tourism impact has also resulted in product development in India, with package trips introduced by Indian operators in response to the film.

Zindagi Na Milegi Dobara showcased a different side of Spain to Indian tourists – with the film's theme of travel being about experience and atmosphere, offering a new way of considering tourism. Research also suggests deep engagement with the film, with viewers influenced to undertake experiential holidays.

The film's success also demonstrates that impact can be pronounced when a destination is shown through the perspective of contemporary, attractive travellers – as is also the case with *Vicky Cristina Barcelona*.

Contributing to this success is a deal was struck with Turespaña, which helped promote the film in India. Turespaña contributed financial support with a co-marketing and media campaign that aimed to turn the success of the film into a 'call to action' for tourists. The body was keen on *Zingadi Na Milegi Dobara* because it was a road movie, the plot was about holidays, friendship, and once-in-a-lifetime experiences and the fact that the producer, director and actors were well known. The promotional drive included television adverts in India.

3.3.5. *The Gunman, Los Ultimos Dias, Tengo Ganas De Ti*

The Gunman is a thriller starring Sean Penn that filmed in a number of European locations. It utilised some key aerial shots of the city, and also filmed at Plaça Reial and Tibidabo. However, the

³⁴ *Spain's Starring Role in Bollywood Movie a Boon to Tourism*

international rollout of *The Gunman* took place during the first half of 2015 and, while the producers were consulted to understand their experience of filming in Barcelona, it was not considered possible to ascertain tourism effects.

Los Ultimos Dias is a Spanish film set in a post-apocalyptic Barcelona and utilised several city buildings and streetscapes, such as Via Laietana, Plaça Francesc Macià and around the Arc de Triomf. The film had worldwide distribution and earned \$2.8m in Spain, where it was nominated for two Goya Awards and 10 Gaudi Awards in 2014, winning seven. With the film's key locations being public spaces, it was considered unlikely that any quantification would be possible without undertaking additional survey work. Nevertheless, a consultation was undertaken with the relevant district regarding Plaça Francesc Macià in order to understand the district's approach to tourism strategy and measurement.

Tengo Ganas De Ti was a hit in Spain in 2012 taking \$15.7 million – the ninth best-performing film overall that year. The film also performed well in Russia, where it was the second most popular film in its opening weekend, grossing \$6.1 million. Anecdotally, there has been some interest in the Barcelona viewpoint featured in the film. While a consultation was undertaken with the district in which this site is located, it was not possible to ascertain level of impact.

3.3.6. Further Evidence

During the case study research, a number of other productions were considered as having had impacts, such as the horror series REC, which has attracted visitors to the private apartment building featured and to the venue of a gory wedding scene.

Another example is the TV3 series *Cites*, a show about dating and relationships, set in Barcelona. The show has an innovative approach to screen tourism, with a website that features an interactive map showing all restaurants and bars featured in the show. Viewers can order the same food they have seen on screen. *Cites* aims to show as much of Barcelona as possible – including to locals, who might see parts of the city they don't know.

Online information, as shown in the interactive map from the show's webpage below, allows viewers to see precisely where the featured restaurants and bars are located, and which episode they appeared in. Viewers can also watch relevant clips and are encouraged to share their experiences on social media.

Figure 19 – Locations featured in TV3 show Cites



4. STRATEGY FOR MAXIMISING SCREEN TOURISM IN BARCELONA

4.1. Introduction

While the screen tourism opportunity is increasingly being utilised strategically by other destinations, it is clear from the case study research undertaken in the previous section that there is a lack of existing strategy related to this area in Barcelona, both at the city level and among individual filming locations.

This section explores screen tourism initiatives in a number of other comparable destinations and sets out a unified strategy with which Barcelona could seek to maximise its existing screen exposure – as well as improving its underlying attractiveness to productions, with a view to increasing potential for future screen tourism.

4.2. Comparable Cities and Regions

In formulating a screen tourism strategy for Barcelona, a number of comparable locations were assessed. This included key destinations such as Paris, London, Stockholm, and Rome, although other relevant initiatives around the world were also examined. This process sought to explore the level of attention given to screen tourism in these destinations, as well as methods or initiatives employed to maximise the potential of such tourism. Where relevant, it also looked at any strategic crossover between production and tourism agencies, as well as evidence of screen tourism – although projects to quantify this are, at this stage, somewhat limited.

The results are outlined in the following sections.

4.2.1. London and the UK

As the capital city of a territory that attracted £1.5 billion in film production spend in 2014, London and the UK have been exploring screen tourism opportunities through a number of innovative projects.³⁵

One key example has been the use of film as part of the GREAT Britain campaign. This government brand initiative promotes the UK internationally as a place to visit, study and do business, with advertising undertaken around the world. Screen products are a key vehicle for the campaign – for example, London imagery from *Paddington* was used in a recent campaign.

Meanwhile, Creative England and national tourist body VisitEngland formed an innovative partnership in 2015 that seeks to integrate creative industry and tourism outputs to develop new products, as well as sharing expertise to enable innovation, skills and knowledge. (See Section 4.3.1.)

Elsewhere there have been deals struck between tourism agencies and producers. For example, VisitEngland has promoted UK holidays for UK residents using Aardman characters such as Wallace and Gromit and Shaun the Sheep. The 2014 Holidays at Home are GREAT initiative saw £138 million in additional tourism spend in 2014, surpassing the target of £80 million.³⁶

London and the UK have also seen the development of innovative products for tourists. For example, 2014 saw the launch of The Paddington Trail, an experiential activity that encouraged screen tourists to move around the city – not just at film locations. The trail – which was created by VisitLondon,

³⁵ New BFI stats show record year for UK film in 2014. BFI, 3rd February 2014. Accessed at

<http://www.bfi.org.uk/news-opinion/news-bfi/announcements/new-bfi-stats-show-record-year-uk-film-2014>

³⁶ A GREAT success: Wallace & Gromit take a break as Shaun the Sheep takes centre stage in Holidays at Home. VisitEngland press release, 2nd March 2015. <https://www.visitengland.com/biz/media-centre/press-releases/2015/march-2015/great-success-wallace-gromit-take-break-shaun-sheep-takes-centre-stage-holidays-home>

Paddington distributor StudioCanal and the NSPCC charity and sponsored by Barclaycard – consisted of more than 50 specially designed bear statues. These were created by artists, designers and celebrities, celebrating London's art, culture and innovation; this added key elements of the city's international cultural appeal to the trail, beyond the core film product.³⁷ The related map was downloaded more than 90,000 times, with the campaign reaching over 27.5 million Twitter accounts. Pages on the Trail's microsite were viewed more than 2.2 million times.³⁸

4.2.2. Paris

Like London, Paris is also the capital of a major production destination. Parisinfo, the website of the Convention and Visitors Bureau, features information on several cinema tours which span different areas of the city, such as Montmartre.

One particularly innovative screen tourism initiative in Paris is the Cinemacity app, described as a "free geolocated cultural and social experience that lets you rediscover Paris through the lens of movies filmed here on location".³⁹ Cinemacity is based around hundreds of film clips that are accessible through a website or an app. Film excerpts are geolocated exactly where they were shot in the city, with tourists able to view clips on their mobile devices in the places where they were filmed. Clips are searchable by neighbourhood, release date or director name.

Cinemacity also offers a number of 'cinewalks', designed around geography or themes, such as the liberation of Paris in the Second World War.

There is also a strong interactive element, with tourists able to submit their own scenes. Moreover, the requirement for users to sign up underlines the potential to build a database with such an initiative.

4.2.3. Stockholm

Stockholm may not attract the same level of international production as London and Paris but it has experienced a substantial impact from the highly successful adaptations of Stieg Larsson's Millennium books, which have seen both Swedish- and English-language film adaptations. The resulting impact on tourism has helped draw attention to the potential of this area.

A survey of tourists, undertaken by the Stockholm City Museum in 2010, found that 6% of respondents said the main reason they visited Stockholm was to take the Millennium walking tour.⁴⁰ Meanwhile, research undertaken in the city in 2011 estimated the value of exposure from the Swedish trilogy at €106 million, which is likely to be higher if the US film had been factored in.⁴¹

The interest does not appear to have faded, with the tours still operating. This underlines the fact that screen products based on enduring underlying material – such as highly popular novels – can experience a particularly long shelf-life as compelling products for screen tourists.

³⁷ VisitLondon webpage on The Paddington Trail. Accessed at <http://www.visitlondon.com/paddington>

³⁸ *Marmalade sandwiches all round as The Paddington Trail raises over £930,000 for the NSPCC*. London & Partners, 19th January, 2015. <http://www.londonandpartners.com/media-centre/press-releases/2015/150119-marmalade-sandwiches-all-round-as-the-paddington-trail-raises-over-930000-for-the-nspcc>

³⁹ Description of Cinemacity accessed at: <http://cinemacity.arte.tv/en/help/>.

⁴⁰ *The Millennium Report – Economic impact and exposure value for the Stockholm region in the Swedish Millennium feature films*, p11. Cloudberry Communications, April 2011.

⁴¹ *Ibid*, pg.

At a city level, Visit Stockholm offers an online film guide for visitors. This includes information on locations in the city and further afield, including the Stockholm Archipelago where director Ingmar Bergman lived and worked. It also draws on wider film culture, with information on interesting cinemas, summer screenings of films in a city park and the Stockholm Film Festival.

Of particular relevance to Barcelona is the fact the site underlines the potential crossover between screen tourism and other aspects of city tourism. For example, information in the film guide to Greta Garbo is linked to information on the Södermalm district where Garbo lived, along with other relevant sites around the city.⁴²

4.3. A Unified Production and Tourism Strategy for Barcelona

There is a clear opportunity for Barcelona to maximise screen tourism. It could also utilise the opportunity in order to assist with some key tourism management issues existing in the city.

To date, there has been limited strategic development in this area – with one exception being the Horta-Guinardó district, which has implemented a strategy that seeks to spotlight the district as a screen tourism destination and a place to undertake filming. However, there has been limited measurement of screen tourism impacts from this strategy.

In order to successfully optimise screen tourism, Barcelona should seek to develop a city-wide strategy that can maximise both production and tourism impacts. Clearly, screen tourism depends on a thriving production throughput – and the key first step for any strategy should be implementing methods of increasing the volume and quality of the type of screen products that could lead to tourism impacts.

Consideration for such a strategy are outlined in the following sections.

4.3.1. Closer working between key agencies

A central method of improving both production and tourism impacts is to ensure that key agencies work together, including bodies that represent tourism, those that facilitate production (i.e. the Barcelona Film Commission), and those that facilitate cultural and economic development. Further integration of private sector stakeholders should also be undertaken on an individual project basis where relevant.

Such closer working relationships would help create synergies between film and television production and tourism in Barcelona at all levels, and ensure that opportunities are not missed. It should seek to fulfil a number of aims:

- Recognise and communicate potential opportunities across key stakeholders in the city, with a view to ensuring that potential major productions are retained in Barcelona and not lost to competitor destinations (see Section 4.3.2 for a discussion of an 'early warning system' to maximise this);
- Communicate the benefits of production and related screen tourism widely, both to agency stakeholders and residents in the city. This would help improve 'film friendliness';
- Identify and create new incentives or methods for attracting filming and maximising associated screen tourism impacts; and
- Identify and promote new, targeted tourism products for the domestic and international market.

⁴² The film guide to Stockholm webpage. Accessed at: <http://www.visitstockholm.com/en/the-film-guide-to-stockholm/>

Certain territories are already seeing closer stakeholder relationships, including the UK. The partnership created in 2015 between Creative England and VisitEngland, for example, seeks to “strengthen the important links between the creative and tourism industries in support of future growth,” with a view to encouraging the integration of creative industry and tourism outputs, and sharing expertise with SMEs in the tourism and creative industries. One of four priorities of the agreement seeks “to ensure that the creative industries’ outputs (i.e. TV/film sets/production) can be used as a lever for consumer (tourist) facing promotion and inspiration”.⁴³

Ensuring that the screen tourism potential of incoming productions is identified and exploited would be a key outcome of closer working between key agencies. An example of what can be achieved when screen tourism is factored in to negotiations around production can be seen in the innovative deal struck for the production of James Cameron’s *Avatar* sequels in New Zealand. Announced in 2013 by the country’s prime minister, the deal calls for a featurette on New Zealand to be included on DVD and Blu-ray releases of the films and that at least one official red carpet premiere is undertaken in New Zealand.⁴⁴

Closer working should also seek to ensure that screen tourism opportunities are maximised by Barcelona throughout a screen product’s lifecycle. The city should take a proactive approach to tracking projects that have filmed in Barcelona throughout their global distribution across different windows, and to seek tourism promotional opportunities in response to success. Some projects attract tourism as soon as they begin filming, and some for decades after release. Proactivity and knowledge-sharing between relevant agencies can help the city take advantage of any such opportunities.

In considering closer working there should also be an effort to define best practice approaches in a number of areas, such as marketing. This would ensure that key production elements of touristic use to agencies – such as stills, video content relevant to the production and to featured Barcelona locations, and interviews – are secured during production for later use in promotional content.

It is important that any unified strategy is strongly co-ordinated, with a clear mandate to ensure its effectiveness and buy-in from all relevant stakeholders. An example of such strategy management can be seen by the UK’s GREAT campaign, which is run by the UK government’s Cabinet Office and unites a number of key stakeholders.

Finally, any strategy to encourage closer working should also seek to incorporate Barcelona’s 10 districts, with a view to making sure that a key strategic aim – dispersing tourism more widely around the city – is achieved.

4.3.2. *Creating an ‘early warning system’*

One key aim of closer working between relevant agencies should be the creation of an ‘early warning system’. Such a system should seek to identify, and co-ordinate a response to, potential major productions considering filming in Barcelona that are likely to have particularly strong impacts. This would include productions with any of the following elements:

- Likelihood of generating pronounced economic effects – i.e. the likely spend in Barcelona is significant. This will also have impacts for employment generation, as well as secondary and spin-off economic effects;

⁴³ *Partnership Statement – Supporting and creating economic growth through the creative industries and tourism*. VisitEngland and Creative England, 20th January 2015.

⁴⁴ *New Zealand Lures Cameron’s Avatar Sequels With Higher Subsidy*. Bloomberg Business, December 16, 2013. <http://www.bloomberg.com/news/articles/2013-12-16/new-zealand-lures-cameron-s-avatar-sequels-with-higher-subsidy>

- Pre-existing projects with known screen tourism effects, such as a sequel to a particularly successful film or a new instalment in a television show with known major impacts in this area, such as *Game of Thrones*;
- Major projects from countries that are also key growing tourism markets;
- Major projects that are specifically set in Barcelona; that tell Barcelona-related stories; or that have been adapted from other successful works, such as novels, that are set in Barcelona;⁴⁵
- Major projects that will feature Barcelona in a particularly impactful way, or that intersect with other key aspects of the city's tourism appeal; and
- Projects with major production companies, financiers or distributors attached.

Key agencies should seek to co-ordinate a better response to such productions as soon as it is known they are potentially interested in filming in Barcelona. Once such a project has been identified it should be effectively communicated to all key agencies so that they can be responsive and proactive in ensuring the film is catered for, and that the benefits it can create for the city are not lost to competitor filming destinations.

4.4. Improving Film Friendliness

A key element of a strategy to improve production throughput is improving so-called film friendliness. This refers to the attitudes and approach to hosting production at both city and resident level, which can have a major impact on the reputation of a destination and its suitability for producing high-end film and television.

While Barcelona does presently attract some major projects – particularly commercials – it struggles to compete globally for major film and television projects. This is due to a range of factors, including the existence of more valuable automatic incentives elsewhere – and while some of these factors are out of Barcelona's control, the city should seek to sharpen its competitive edge where possible.

For example, the city should ensure that production processes are dealt with in a straightforward, proactive and timely manner. Some producers argued that city agencies, while supportive of filming, can be bureaucratic. This has been experienced in relation to the speed and efficiency of obtaining filming permissions. Some felt this process had been more difficult in Barcelona than elsewhere.

The needs of residents are particularly central in Barcelona and there may be an element of 'production fatigue' – particularly among those living in areas that host high volumes of production and tourism. Key city agencies should therefore seek to better communicate the importance of the production sector and its economic and employment impacts to Barcelona residents, while examining methods of ensuring that impacts on residents are minimised and that production is sustainable.

City attractions that are also in-demand filming locations could also consider collaborating to share information on how they deal with productions so that a united logistical approach can, where possible, be adopted to make approaches clearer and easier for producers. This could, for example, relate to fees and charges that producers could expect to pay. Such a linkage could also extend to the sharing of best practice strategies for maximising screen tourism.

⁴⁵ Such projects can have particularly enduring appeal for screen tourists, as witnessed by the ongoing popularity of the Millennium films for screen tourists in Stockholm.

4.5. The Potential for Selective Funding

The throughput of high-end film and television production could be improved further if Barcelona was able to offer a degree of funding for projects that have particular potential as generators of economic impacts and screen tourism.

Major projects are now routinely made all over the world and choose to locate in specific destinations based on a number of interrelated factors, both creative and economic. For the latter, incentives play a key role in attraction. The national Spanish incentive is not as attractive as those in other countries, and Barcelona could help counter this disadvantage with a city production attraction fund.

Such a fund would offer a degree of financing for projects that feature Barcelona stories or culture, or depict the city in a positive way (see relevant factors outlined in Section 4.3.2). This could be relevant for domestic and inward investment features, as well as co-productions.

Such selective funding is available in a number of destinations. It can play a central role in drawing production and can have highly positive economic – and other – impacts. For example, Northern Ireland's Large Scale Production awards for the first four series of *Game of Thrones*, including the pilot, and Universal's *Dracula* between 2010 and 2014, reportedly brought returns of £102.2 million from an investment of £12.5 million.⁴⁶

4.6. Supporting Private Businesses

As part of a strategy to grow screen tourism, Barcelona should give consideration to the private sector and how to assist it in building new products for the screen tourism market.

In the tourism sector, support could be given to private businesses in developing products. This could involve holding information events that outline best practice case studies in other countries. It could also help disperse information on intellectual property and rights usage so that operators are not infringing copyright in the development of such projects.

4.7. Messaging and Communication

A cornerstone of a new strategy to maximize screen tourism in Barcelona should be the implementation of a plan to take a more proactive approach to communicating the city's screen tourism appeal to potential and current visitors. Barcelona tourists are offered some screen product information and movie walks, but this material could be better presented and circulated – particularly because Barcelona is so well connected with public wifi.

Such information should seek to encourage tourists to visit diverse parts of the city. Like Paris, this could be done in the form of an app that geolocates film clips and other content, while the screen tourism information could – like the London Paddington Trail – seek to intersect the screen tourism interest with other key elements of Barcelona's offer, such as history, art and culture. In this way screen tourism interest could be used as a platform to promote other aspects of the city and assist with the tourism dispersal objective.

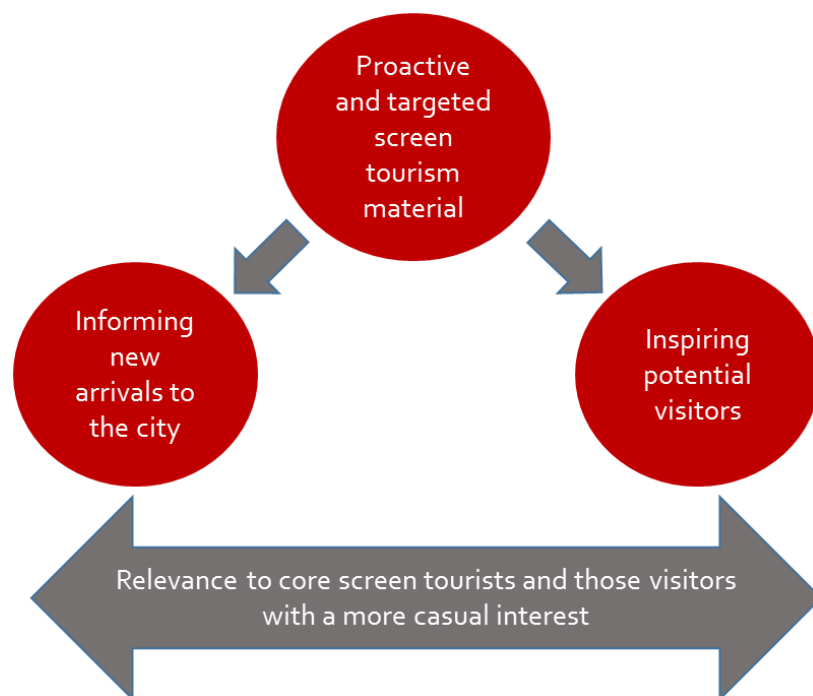
Beyond online information, there are also other ways that screen tourism information can be communicated. One innovative example can be seen in the English city of Bradford, which has trained hotel staff as City of Film ambassadors in order to encourage interest and visits.⁴⁷

Barcelona should seek to target information at screen tourists at two key points – before they have decided to come to Barcelona and once they have arrived in the city.

⁴⁶ *Opening Doors: A Strategy to Transform the Screen Industries in Northern Ireland: Phase 1 2014-18*, p11. Northern Ireland Screen.

⁴⁷ *Hotel staff to become City of Film ambassadors*. Telegraph & Argus, 11th June, 2015.

Figure 20 – Screen Tourism Points of Engagement for Barcelona



Engaging with tourists before they travel can be highly valuable, and requires proactivity. Barcelona should seek to engage with viewers at the time relevant screen products filmed in the city are being distributed internationally. Information should be provided on the city's links to the screen product and the relevant locations. This can be particularly useful when locations have doubled for another locale on screen, so that it is not immediately obvious that the screen product features Barcelona. Social media channels can be an effective way of undertaking viewer engagement in this way – and the success of relevant Barcelona-shot screen products in specific markets should be assessed, so that a targeted communication strategy can be implemented.

Interested viewers could be directed to up-to-date information online about the screen product. Such information should be developed and targeted, presenting experiential ideas for visitors, and should be relevant to core screen tourists and general screen tourists alike.

The proactivity of the UK's GREAT campaign is good example of this, with experiential ideas for screen tourists. For example, there are ideas on how to live like James Bond, with tips on where to drink martinis and buy suits – further underlining screen tourism's potential to impact the tourists move around a city and impact unrelated businesses, even to sites that have not been used a location.⁴⁸ Experiential events have also been offered in locations such as Northern Ireland, which has seen dragon feeding at Belfast Zoo.

By engaging with tourists in this way and presenting them with ideas, Barcelona can explore new ways of promoting itself.

4.8. Data Capture and Maximisation

As previously outlined, there was a significant absence of data with which screen tourism could be assessed in Barcelona, both at city level and at individual locations. Measurement should be considered a vital part of any future screen tourism strategy, both to track a base level of activity and to track the effect of the implementation of such as strategy.

⁴⁸ *Live like James Bond*. VisitBritain webpage. <http://www.visitbritain.com/en/Live-like-James-Bond/>

It is important that such measurement also seeks to assess the value of screen tourism, so that the benefits to the city and its residents can be accurately understood and presented to those groups. This will assist with promoting a wider understanding of the benefits of screen tourism.

Individual locations that undertake visitor surveying should also be encouraged to incorporate screen tourism questions when any high-profile productions have filmed there. Alternatively a programme of targeted surveys at such sites could be undertaken. Given the brevity required from additional screen tourism questions on the city's continuous survey, additional surveys would offer the opportunity for deeper assessment into areas, such as interest in other cultural aspects of Barcelona's offer.

Such data would assist the city in understanding the effectiveness of its tourism strategy and its implementation, informing its focus for the future.

5. BESPOKE MODEL FOR MEASURING SCREEN TOURISM IN BARCELONA

5.1. The Importance of Robust Measurement

It is important that a strategy to maximise screen tourism in Barcelona is underpinned by a robust approach to measurement. As previously outlined, there has been a lack of measurement undertaken to ascertain the effects of screen products on tourism, both at city level and among individual tourist sites that have been featured in screen products. This has resulted in a lack of insight into screen tourism in Barcelona.

Effective measurement of screen tourism would lead to better tailoring of strategy in response to current findings from the tourism market. Such measurement would enable:

- A clear understanding of existing screen tourism impacts, providing a baseline against which any impacts of a screen tourism strategy could be measured;
- Ongoing monitoring of the effectiveness of screen tourism strategy longitudinally;
- The ability to benchmark the effects of strategy against other sectors attracting tourism – and to tailor investment accordingly; and
- The potential to track issues of strategic importance to the city – e.g. to what degree are screen tourists dispersing throughout the city and how much extra value do they represent?

As outlined in Section 2.3, screen products can have a wide range of motivational effects on tourists – from inspiring visits that would not have otherwise occurred to providing an additional factor in a decision to visit a specific destination. It is important, therefore, that such a measurement model is carefully calibrated to incorporate these motivational differences.

Given the importance of communicating the benefits of production to the city, a key output of a measurement model should be the ability to be clear about the value of screen tourism. Accurately capturing motivational levels also enables values for relevant visitors to be assigned, reflecting the degree of screen tourism motivation. This would ensure that any resulting valuation is accurate and credible.

5.2. A Screen Tourism Measurement Model for Barcelona

In designing such a measurement model for Barcelona that can detect and value screen tourists, there are four key steps, as outlined in Figure 21.

The model relies on surveys undertaken with tourists in Barcelona and it is suggested that the city's current continuous survey on incoming visitors is augmented with a small number of questions. These questions are able to ascertain the presence of screen tourists within the overall tourist population. Within the screen tourism group, a question can also ascertain how important a screen product was in helping the tourist decide to visit.

The resulting data are then triangulated with other relevant data from pre-existing survey questions so that the profile of screen tourists can be compared with the profile of general tourists.

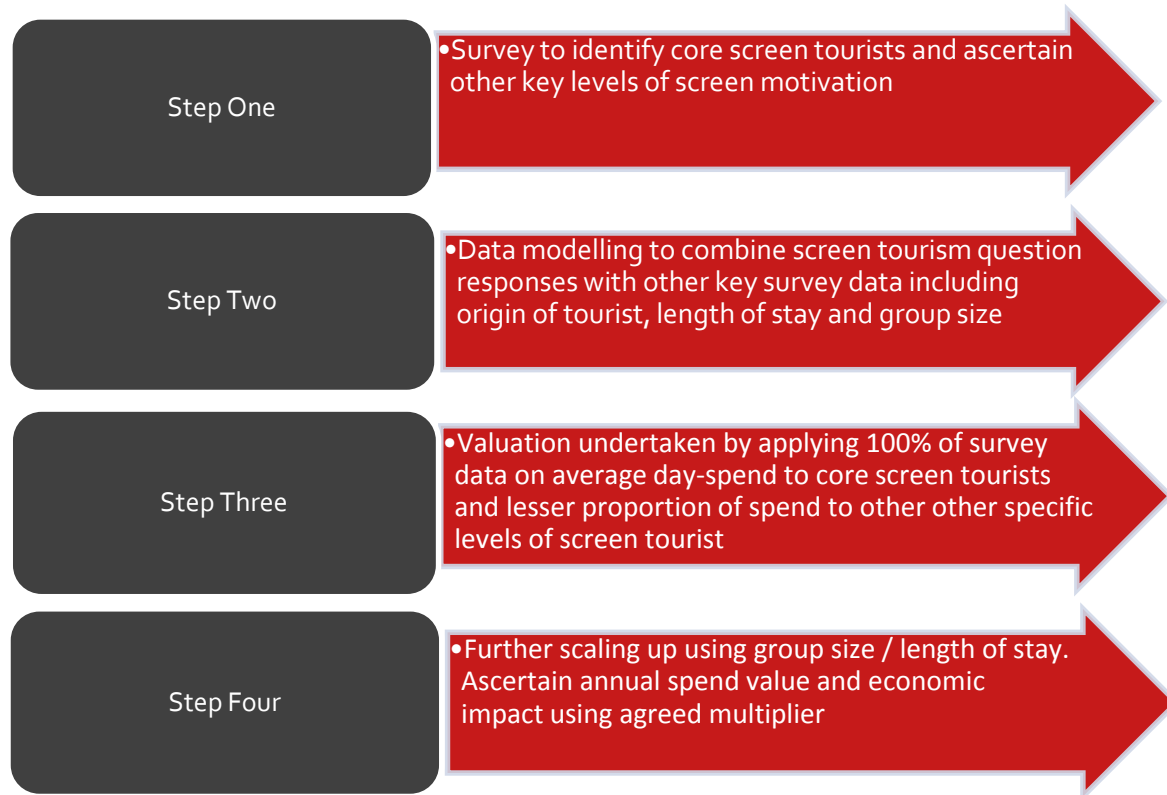
To provide an overall valuation a spend value is assigned depending on motivation – i.e. those who said they would not have visited Barcelona without the screen product link would be assigned 100% of the average day spend value. For those who said they would have visited anyway but said a screen product was a main reason, 50% of the average value can be assigned.⁴⁹

⁴⁹ This model for assigning value was created by SPI and successfully used in *Quantifying Film and Television Tourism in England*. Ibid.

The model is particularly robust, since those tourists who point to the screen product as contributing a minor factor in their decision to visit are not included. Value can also be scaled up further to reflect size of group and length of visit.

This results can be presented annually, as the current survey results are, or could be further assessed in specific time frames related, for example, to the release of specific projects.

Figure 21 – Key Steps for a Screen Tourism Measurement Model



5.3. Utilising Barcelona's Existing Tourism Survey

It is suggested that the use of Barcelona's continuous tourism survey is utilised for the screen tourism measurement model. It is understand that adding a small number of questions would be possible.

In order to isolate screen tourists and ascertain motivational levels it is suggested that the following questions are included as a minimum:

Would you have visited Barcelona if you had not been aware of its links to a screen product?

- C. Yes
- D. No

If one of the reasons for your visit to Barcelona was a screen product, how important was that link in your decision to visit?

- E. It was the main reason
- F. It was a main reason, but there were also other factors
- G. It was a secondary reason
- H. It was only a minor reason.

The data generated by these questions would enable a clear understanding of the proportion of core screen tourists within the overall tourist population and the valuation of core screen tourists (i.e. 100% of the value of those answering A to the second question, and 50% of those answering B).

In addition to the two baseline questions, a number of other questions could be formulated to uncover further information. For example, there could be a question on the specific screen product that has induced the visit and how the visitor learned that Barcelona was featured. This would point to the effectiveness of strategic communication efforts.

Further triangulation, with existing data generated by the continuous survey, would enable an understanding of a number of other elements of screen tourism, such as:

- Interest in other cultural forms; this could help inform the creation of tourism information and other products that seek to exploit synergies between film and other cultural forms;
- Areas visited and activities undertaken;
- Length of stay compared with other types of tourist;
- Demographic range, such as age, and gender;
- Group size;
- Levels of domestic and international screen tourism;
- Relevance of screen tourism for visitors travelling to Barcelona for business;
- Sources of information consulted when planning the trip; and
- Levels of repeat visits.

Deeper insight into screen tourists would, of course, enable Barcelona to better cater for such visitors.

5.4. Valuing Screen Tourism

In valuing screen tourists, the model should assign 100% of the average Barcelona day spend rates to tourists who would not have visited the city without the screen product link and 50% of the average for those who said they would have visited but pointed to the screen product as the main reason.

Given that core screen tourists would not have travelled to Barcelona without having seen an associated screen product, the value of their entire group could also be counted.

To fully communicate the benefits of screen tourism, a multiplier specific to tourism in Spain can also be applied to the annual value. Such multipliers recognise the fact that direct spending also has secondary and tertiary effects in an economy through supply chain and consumer spending that arises from this direct activity. Multipliers are categorised as Type I (which consider direct and indirect impacts) and Type II (which add the 'induced' effects of employee spending to direct and indirect impacts). Typically, economic impact can then be measured in terms of employment and Gross Value Added. As an example, a Type I GVA multiplier of 2.2 has been used in the UK, and Type II GVA multiplier of 2.8.⁵⁰

5.5. Surveys at Individual Sites

The city should also encourage more individual attractions or businesses to undertake screen tourism-specific survey work – particularly those that undertake existing visitor assessment. Such work could help provide more detailed insights into screen tourism motivation and behaviour – particularly in relation to the effects of individual screen products.

⁵⁰ *Tourism: jobs and growth. The economic contribution of the tourism economy in the UK*, p28-29. Deloitte/Oxford Economics. November 2013.

6. APPENDIX ONE – METHODOLOGY

6.1. Introduction

The methodology developed for this project is outlined in detail in the following sections. It involved 10 key steps, with several occurring simultaneously:

1. Preliminary document review
2. Inception meeting
3. Data gathering and desk research
4. Confidential consultations
5. Benchmarking against comparison cities
6. Location case studies
7. Team brainstorm and synthesis
8. Presentation and draft report
9. Further research and consultations
10. Final report.

6.2. Preliminary Document Review

While SPI has a high level of knowledge of the screen tourism and production spheres, the assignment was launched with an initial document review to ensure visibility of all relevant current studies. At the same time, key existing documents of relevance to Barcelona were reviewed, including survey data and information published by Barcelona Turisme.

Other key city-specific reports were examined along with relevant news articles and features to provide insight into current trends affecting Barcelona's tourism and screen production sectors.

6.3. Inception Meeting

Shortly after the start of the Study, a client meeting was held in order to discuss the details of the project in depth. This enabled detailed discussion of the methodology and its relevance to Barcelona and the Client's objectives. A number of further Client meetings were held during the project.

6.4. Data Gathering and Desk Research

A thorough literature review was undertaken to assess any new, pertinent research and statistical data. This wide-ranging process involved research into the tourism and screen production sectors in Barcelona, including data, trends and statistics. It assessed academic research, statistical releases and news articles. Current trade press and other articles were also reviewed in order to surface any current wider trends in tourism and production of relevance to Barcelona. In total, over 45 documents were examined.

6.5. Confidential Consultations

A process of consultations was undertaken throughout the Study to surface trends, insight and data across a number of relevant areas. A total of 33 consultations was undertaken including:

- Producers of case study projects;
- Location scouts and production managers with experience of working in Barcelona;
- Private and public owners of locations used in filming;
- Tourism authorities in Barcelona and Spain;
- Bodies engaged with the promotion of Spanish tourism overseas;

- Tourism academics;
- Private companies with screen tourism products;
- Tourism authorities in comparable cities / countries; and
- Official screen agencies.

Consultations were particularly important in assessing the impact of screen tourism for the location case studies, as outlined in the following section.

6.6. Location Case Studies

A key part of this assignment involved undertaking a number of case studies in order to assess evidence of screen tourism to Barcelona. This method has been successfully employed by SPI in previous work in this area and enabled the study team to assess inbound screen tourism to Barcelona at a much more detailed level than would have been possible with assessment of existing data.

In order to select sites for study, a decision matrix was developed. This detailed a number of key productions, alongside key data, such as Barcelona locations used, level of audience penetration in home or international markets and production territories.

This matrix was then discussed in detail with the Client, with particular consideration given to selecting a group of locations that spanned a broad range of key criteria, including:

- Type of location – e.g. a private attraction that charges admission, or a free city park;
- Type of screen production – including international feature film or television drama, and Spanish-language film or drama;
- The ability to represent a spread of locations commonly used by international productions coming to Barcelona; and
- Where the screen product has been distributed.

Following this assessment, seven productions were selected for detailed further study. Consultations were then undertaken with producers and location managers to identify key Barcelona locations, along with any tourism effects the producer had witnessed on the site. This process also gathered views of film-makers on their experience of filming in Barcelona in order to understand the 'film friendliness' of the city.

Next, a number of key locations were studied. Where possible, visits were undertaken to the locations and consultations held with owners or managers to ascertain effects. These consultations also sought to understand the availability of visitor data with which further assessment could be undertaken, as well as understanding whether the site had sought to maximise its screen links in any way.

6.7. Benchmarking Against Comparative Cities

In order to benchmark the strategic utilisation of screen tourism, a comparative exercise was undertaken with a number of locations that were considered comparable to Barcelona, either in the size of their tourist market or the profile of their appeal to visitors or film-makers. These were:

- London / the UK
- Paris
- Rome
- Stockholm

This process assessed any available data that could be utilised and involved looking at how screen tourism was being utilised in the location's tourism offer – if at all. Consultations were held with tourism authorities to understand the strategic importance given to screen tourism.

This stage provided an opportunity to benchmark Barcelona's utilisation of the screen tourism opportunity against those of the comparison cities, exploring comparative levels of proactivity and also differing approaches to maximising screen tourism.

6.8. Team Brainstorm and Synthesis

Mid-way through the study, and to prepare for drafting, an internal brainstorm session was held at which the consultancy team collated, assessed and analysed all data and information gathered to date. This was undertaken in order to create the findings of the Assignment and key outputs, such as a strategy for maximisation and a bespoke model for measuring screen tourism. The team also discussed the elements that would be contained in the final report and identified areas for further research.

6.9. Presentation and Draft Report

With key findings identified, a presentation was drafted in PowerPoint format, which summarised the work and findings of the study.

6.10. Further Research and Consultations

Following Client feedback, drafting began and any outstanding areas of research were assessed in response to feedback.

6.11. Final Report

With all research finalised, the full, final written report was drafted and submitted to the Client.

7. APPENDIX TWO – BIBLIOGRAPHY

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8. APPENDIX THREE – ABOUT OLSBERG•SPI

Olsberg•SPI is a creative industries strategy consultancy that provides advice to public and private sector clients, specialising in the worlds of film, television and digital media. Formed in 1992, and based in London, it has become one of the leading international consultancies in these fields.

The firm's expert advice, trusted vision and proven track record create high levels of new and repeat business from a diverse group of companies and organisations, including:

- Multi-national public authorities
- National government bodies, including culture and economics ministries, film institutes and screen agencies
- Regional development agencies for the creative industries
- Trade associations and guilds
- Independent companies involved in all aspects of the screen business value chain
- National and international broadcasters
- Training and skills development organisations
- Publishers and conference organisers.

Olsberg•SPI's clients in recent years have included:

- The British Film Institute
- The European Audiovisual Observatory
- The Canadian Media Production Association
- The Eurimages Fund
- Bristol City Council
- Pinewood Studios
- Film City Studios
- The New Zealand Film Commission
- Screen Yorkshire
- Abu Dhabi Film Commission
- The Government of Hong Kong
- Mauritius Board of Investment
- BBC Worldwide
- Motion Picture Association of America
- Directors UK
- Film Väst, Sweden
- Screen Australia.

With expertise in all areas of the fast-moving global creative sector, Olsberg•SPI offers a wide range of services, including:

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Advice on the creation of fiscal incentives for film and television productions
- Mapping and economic impact studies
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Evaluations of publicly-funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs

- Writing prospectus-style funding proposals
- International cost comparisons for small and large film and television productions
- Marketing and business strategies for small and large-scale studio facilities
- Strategic advice on inward investment and exports for national and regional public bodies
- Analysing and explaining the links between growth in tourism and a nation's film and television output
- Providing strategic advice for screen commissions, including business and marketing plans.