



Insight Department: The Outlander Effect & Tourism

Topic Paper | Updated March 2022

Welcome

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

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

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

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

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

Set-Jetting

The appeal of Screen Tourism

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

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

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

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

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

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

Did You Know?

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

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

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

Talking Outlander

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

There are also Caitriots and Menziatics...

Who are the Outlander visitors?

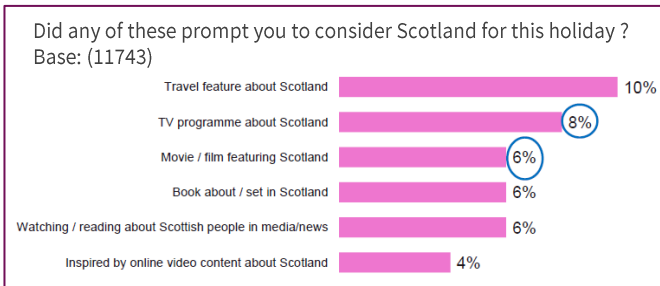
In its first series, Sony Pictures⁴ had distributed **Outlander** to over 87 territories, from China to the **US**. This huge global coverage provided massive potential appeal for visitors to come to Scotland and see the locations. But who are the markets for screen tourism for Outlander?

Did You Know?

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

Source: VisitScotland Visitor Survey / GBTS / IPS

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



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



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



Key Takeouts:

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

Understanding our Visitors

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

Visitors From Australia

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

Key Websites Used

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

Key Social Media Accounts

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

Influential Film and TV Programmes for Travel

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

Source: VisitScotland Research 2014/2017

PLANNING & BOOKING

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

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

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



MOTIVATIONS TO VISIT SCOTLAND

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

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

Aspects Important in Choosing Accommodation:

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

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



Doune Castle, Stirling

Understanding our Visitors

Visitors From France

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

Key Websites Used

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

Key Social Media Accounts

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

Influential Film and TV Programmes for Travel

- Outlander
- Braveheart
- James Bond Skyfall
- Échappée Belle

Source: VisitScotland Research 2014-2017

PLANNING & BOOKING

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

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

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



Source: Scotland Visitor Survey 2015/2017

Aspects Important in Choosing Accommodation:

- Value for Money 75%
- Location 44%
- Quality star grading 34%
- Availability of free Wi-Fi at accommodation 30%

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

Visitors From Germany

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

Key Websites Used

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

Key Social Media Accounts

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

Influential Film and TV Programmes for Travel

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

Source: VisitScotland Research 2014-2017

TOP 5 ACTIVITIES IN SCOTLAND

- Sightseeing by car/coach/on foot 85% (survey average 74%)
- Visited castle/ historic house 84% (survey average 60%)
- Visited cities 79% (survey average 42%)
- Visited cathedral, church 78% (survey average 46%)
- Centre based walking (i.e around a town centre) 72% (survey average 45%)

PLANNING & BOOKING

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

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

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



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

Understanding our Visitors

Visitors From the USA

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

Key Websites Used

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

Key Social Media Accounts

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






Influential Film and TV Programmes for Travel

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

Source: VisitScotland Research 2014-2017

ACCOMMODATION

Accommodation Preferences:

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

PLANNING & BOOKING

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

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

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



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

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

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

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

Witnessing the Outlander Effect

How do we measure the *Outlander Effect*? Through performance metrics gathered from our consumer website visitscotland.com. Web analytics is the analysis and reporting of website data. The anonymous, aggregated results help us understand the profile of visitors to the website, where they came from, how they got to the website and what other “content” they consumed. Check out [digital tourism scotland](#)⁶ for advice on how to use digital marketing and technology to benefit your tourism business.

How popular is Outlander on visitscotland.com? Outlander content has been on visitscotland.com since 2014 and these pages have consistently ranked highly in the film and TV subtheme. In 2015 there were almost 1 million Outlander pageviews, since then it has averaged around half a million a year. That said from 2016 to 2019 the pageviews on visitscotland.com channels increased year on year from 425,000 to 703,000. For years 2020 and 2021, during COVID-19 there were still 554,000 and 352,000 pageviews despite the steep decline in international inbound travel reflecting the popularity of the content on visitscotland.com and the trend for “Armchair Travel”.

Search Engine Optimisation (SEO) is the practice of increasing the quantity and quality of traffic to your website through organic search engine results – or having the best “words” on your website to be “found” by a search engine e.g. Google, Baidu or Bing. SEO rankings for the main Outlander page placed **1st in Google searches in both 2017, 2018 and 2021** for the following queries:

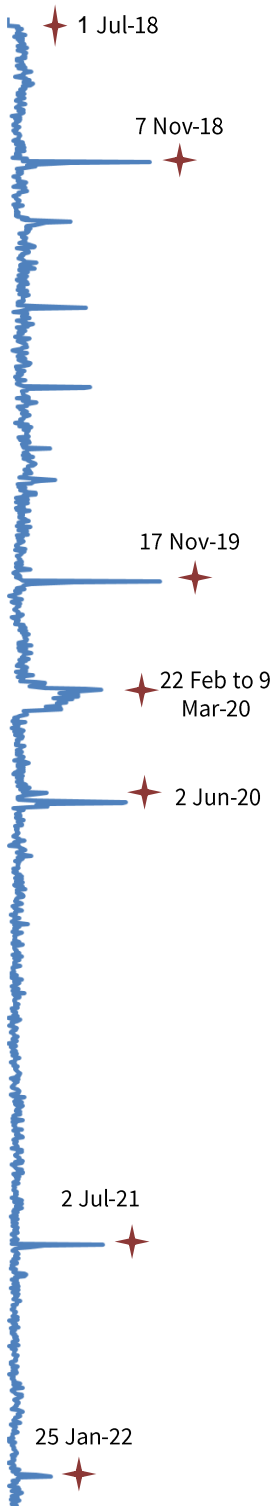
Outlander Filming Locations, Outlander locations map,, Outlander Tours Scotland and “Where is Outlander filmed” (a long tail keyword!)

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

What else did users click on after finding Outlander? From the Outlander page there were clicks to other pages on visitscotland.com exploring content such as standing stones, castles, ancestry and other TV and film locations. The most popular referral pages or external link clicks in 2020 and 2021 included hopetounhouse.co.uk, Culloden Battlefield and the Jacobite steam train.

Who are the visitors? Outlander content consumers Prior to 2019 were mainly women (77% page visitors compared to the 58% visitscotland.com average for female). By 2021 this had fallen to 69% female share, showing the increase in popularity among males in Outlander as the subsequent seasons aired. Visitors are also likely to be 35–44 and 45-54 years old with 40% of the page views. The 25-34 year old age group, has a quarter of the page views making them the largest single age cohort.

Analytics continued



Visitscotland.com included Outlander content since 2014. Since then, there have been spikes of interest in Outlander content related to new episodes, season releases and/or other media activity involving Outlander. The chart to the left of the page shows the correlation of increased pageviews of Outlander content from July 2018 to January 2022 which includes the launch of series 4 and 5.

The Outlander Film Location map has also been among the top PDF downloads from visitscotland.com. It was the top download from 2017 to 2019, only to be the second biggest download in 2020 replaced by the Camping Pocket Guide. With the pandemic in 2021 the Outlander Film Location map was 4th most popular download after the Covid Restrictions Maps and Camping Guide took the top 3 downloads showing it remained popular despite the challenges of COVID-19.

Audience Location

The majority of users to the Outlander pages on visitscotland.com are from the UK and US (accounting for 47% of total users). For context, around a fifth of outlander content consumers came from the US, compared to the 6% for general web content.

Outlander content was also popular in Germany and France (accounting for 18% of total users). Within the domestic (UK Resident) market, the series fans tend to originate from London, Edinburgh and Glasgow.

How did they arrive at the Outlander site?

Around 75% of Outlander content consumers are generated from **organic traffic** (visitors are considered **organic** by finding the website using a search engine like Google or Bing, so they are not “referred” by any other website) followed by social media channels. However, US users had the lowest share of organic traffic and a **higher percentage of display and email traffic** than any other market.

Instagram was the **top performing** social media **channel** for Outlander related content, with the highest reach, likes and comments. **Facebook** was the channel where content was shared the most and **Twitter** had the highest number of posts related to Outlander in 2021.

The Impact of Outlander on Visitor Attraction Performance

Visitor attractions used as filming locations are a beneficiaries of the *Outlander Effect*. The Moffat Centre for Travel and Tourism at Glasgow Caledonian University report in their Visitor Attraction Monitor⁷ growth in attendance for these visitor attractions from the start of Outlander broadcasts in 2014 through to 2020 averaged 19%. In 2014 for the 23 (comparable) Outlander attractions there were 1.47 million visitors. By 2020 the number of visitors increased to 3.20 million. For 2020, taking into account COVID-19 impacts, visits to Outlander attractions were 1.75 million.

With the varied nature of locations, the benefits to the visitor economy are distributed throughout Scotland. Furthermore, the size of the attractions (Preston Mill to Glasgow Cathedral) shows the impact of screen tourism is not biased to already popular destinations.

Of the attractions providing permission to publish their data (table below), we see that most have seen double digit increases in attendance from 2013 to 2019. In 2020 (during COVID-19) they still show good attendance (outside of lockdowns) despite the lack of international markets.

Outlander Seasons / Release Year	Season 1			Season 2	Season 3	Season 4		Season 5	% Change 2014-2019	Local Authority
Attraction Bold shows first appearance	2013	2014	2015	2016	2017	2018	2019	2020		
Aberdour Castle	12,518	13,184	14,107	15,392	19,381	27,507	24,768	4,384	87.86%	Angus
Arniston House	690	711	533	590	676	400	829	114	16.60%	Midlothian
Beechraigs Country Park	436,749	518,367	552,276	596,181	764,670	1,016,747	1,112,856	1,209,106	114.68%	West Lothian
Blackness Castle	15,197	16,559	21,556	30,053	42,810	58,388	79,265	10,212	378.68%	Falkirk
Bo'ness & Kinneil Railway	68,306	68,329	73,830	69,085	65,634	67,038	60,822	2,014	-10.99%	Falkirk
Callendar House	36,060	32,514	45,491	34,981	51,882	61,533	62,465	15,017	92.12%	Falkirk
Craigmillar Castle	18,639	20,971	21,098	23,221	20,877	35,473	40,634	7,100	93.76%	Edinburgh
Culloden Visitor Centre	109,063	98,780	117,814	141,776	180,875	200,646	209,011	182,496	111.59%	Highland
Culross Palace (closed 2020)	10,446	10,669	11,556	13,112	16,022	24,445	25,209	Closed	136.28%	Fife
Dean Castle (closed 2018-2020)	29,827	22,806	24,767	21,778	13,541	Closed	Closed	Closed	N/D	East Ayrshire
Doune Castle	38,081	47,069	68,518	90,279	124,341	142,091	152,987	15,549	225.03%	Stirling
Glasgow Cathedral	233,172	219,947	182,205	296,062	389,101	482,783	537,415	33,900	144.34%	Glasgow
Glencoe Visitor Centre	114,284	130,006	133,444	199,327	165,303	213,343	436,924	93,547	236.08%	Highland
Hopetoun House	51,879	35,502	29,300	31,478	32,449	36,776	37,940	3,536	6.87%	Edinburgh
Linlithgow Palace	66,500	63,274	66,324	74,428	86,596	94,718	103,312	12,128	63.28%	West Lothian
Muiravonside Country Park	No Data	117,099	124,229	132,941	146,517	138,912	143,851	140,869	22.85%	Falkirk
Newhailes House	4,307	4,831	5,351	5,425	5,388	68,360	65,395	7,383	1253.65%	East Lothian
Preston Mill & Phantassie Doocot	2,298	1,872	2,383	2,217	2,748	2,967	2,590	601	38.35%	East Lothian
Scottish Fisheries Museum	11,406	12,648	11,745	11,431	11,764	10,633	10,689	1,693	-15.49%	Fife

Historic Environment Scotland manage many of the heritage sites used as Outlander filming locations. They recognise Scotland's historic sites are a catalyst for economic growth. Reporting their 2018 performance, sites featured in the TV show have continued to see record-breaking numbers that year, with Blackness Castle reaching over 58,000 visitors for the first time – an increase of 36% from the previous year, while Doune Castle (+14%) also experienced an increase in footfall to 142,000⁸.

The Impact of Outlander on Visitor Attractions

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

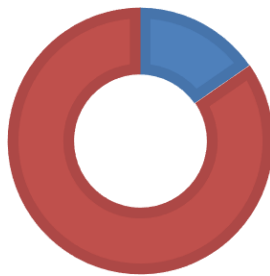
- 1) Is the Visitor Attraction an Outlander filming location.
- 2) Is their Visitor Attraction close to an Outlander filming location, but isn't one themselves.

The answers provided to the survey across the range of respondents show that the majority of all attractions recognise that screen tourism is beneficial to the sector. The benefits of being an attraction used as an Outlander location are clear with over half showing growth in new markets, products, events and interest from other media productions.

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

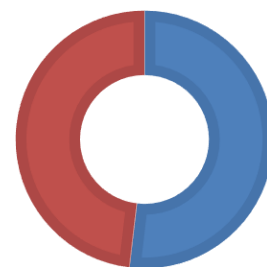
IS YOUR VISITOR ATTRACTION A FILMING LOCATION FOR OUTLANDER?

■ 15% Yes (16) ■ 85% No (88)



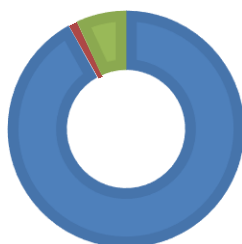
(IF NO) HAS YOUR ATTRACTION BEEN USED AS A FILMING LOCATION FOR ANY OTHER MEDIA PRODUCTIONS?

■ 52% Yes (42) ■ 48% No (39)



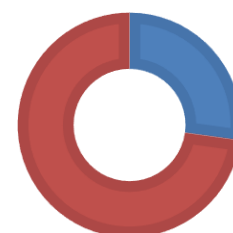
(TO ALL RESPONDENTS) DO YOU CONSIDER FILM TOURISM, POSITIVE OR NEGATIVE FOR THE SCOTTISH VISITOR ECONOMY?

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

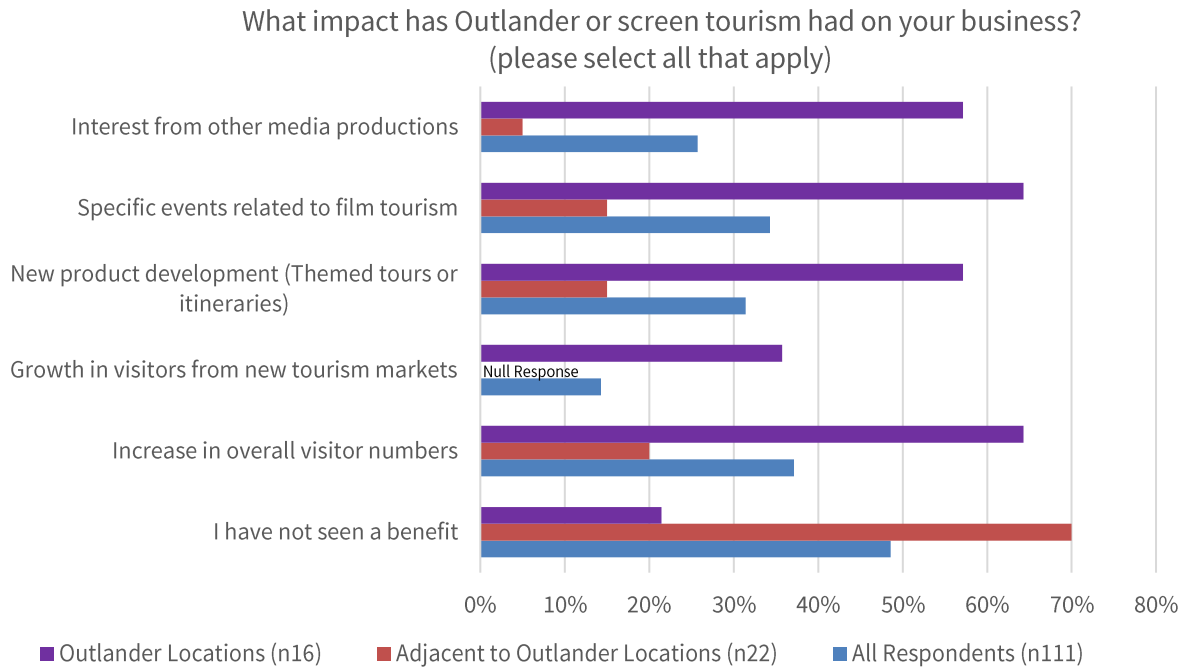


AND IS YOUR ATTRACTION LOCATED NEAR AN OUTLANDER FILMING LOCATION, BUT ISN'T A FILMING LOCATION OF ITSELF?

■ 27% Yes (22) ■ 73% No (59)



The Impact of Outlander on Visitor Attractions



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

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

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

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

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

Case Study – The Tour Operator

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

What is your experience in tourism?

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

How did you see the business opportunity for your product?

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

Who are your clients, where do they come from?

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

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

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

Describe a memorable moments on a tour with the fans.

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

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

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

The Impact of Outlander – The Industry’s Voice

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

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

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

Talking Outlander

Out-man-der – a male fan of Outlander

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

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

Screen Tourism - Business Best Practice

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

- Ensure you and your staff have at least a basic knowledge of the production that took place in your local area. This could include including filming locations, plot summaries, and anecdotes so you can speak confidently to guests. Perhaps develop an FAQ handbook so staff can record questions asked and research the answers. Some attractions interviewed reported changing their guided tours to meet growing demand so that heritage tourists received the history tour and screen tourists had the location tour.
- Highlight your connections with screen tourism with potential guests, through your website, blogs, social media and newsletters. Don't forget to have your visitors tweet, post and comment on their experiences to develop those referrals and user generated content.
- If you run a visitor attraction with historic and screen tourism connections, consider how you can tell its story in an engaging and interactive way, which will really bring the story to life for ancestral visitors.
- If you are an accommodation provider, think about ways in which you could bring the screen tourism connections of your area to life for guests.
- Collaborate with similar minded businesses to set up your own screen tourism partnership. Organise themed events for fans, develop self guided tours, and knowledge base for recommendations on the best sites for guests to get their authentic experiences.

Key Takeouts:

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

Notes on Outlander Effect and COVID-19 Pandemic

The impact of the 2020 COVID-19 pandemic on tourism is well documented. The UK reported up to -80% drop in international inbound visitors during the years 2020 and 2021 compared to the pre-pandemic levels of 2019. We can see from the figures shown on page 9 that visitor attractions in Scotland both those that are Outlander filming locations and those that aren't have seen impacts in visitation.

While we can see that our website page views for Outlander remain popular, International consumer sentiment studies undertaken collaboratively during 2020/21 among the National Tourist Boards of VisitBritain, VisitScotland, VisitWales and London & Partners¹⁰ show a steady desire to travel over the next 12 to 24 months. For Scotland, Outlander markets of Germany and North America, with Spain index highly on visitation for holidays and exploring history and heritage being a popular activity and motivator. This reinforces that the Outlander effect remains a positive catalyst for recovery and growth.

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Page 4:	Screenshot from Scotland on Screen 5 Romantic Screen Locations (VisitScotland)
Page 6:	Preston Mill, East Linton (Kenny Lam)
Page 6:	Craigmillar Castle (Kenny Lam)
Page 12:	Linlithgow Palace and St Michael's Parish Church by Linlithgow Loch (Kenny Lam)
Page 13:	Schiehallion seen from Kinloch Rannoch (Kenny Lam)
Page 14:	Falkland Village, Fife (Kenny Lam)
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Talking Outlander

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



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