

# **The Relevance of Destination Placements in Movies for Tourism in Slovenia**

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Bachelor Thesis for Obtaining the Degree

Bachelor of Science in

International Management

Submitted to Marion Gaurus

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## **Affidavit**

I hereby affirm that this Bachelor's Thesis represents my own written work and that I have used no sources and aids other than those indicated. All passages quoted from publications or paraphrased from these sources are properly cited and attributed.

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## Abstract

Film-induced tourism is defined as visiting a destination or attraction due to the destination being featured in movies or series. Even though a movie's purpose is not to market a destination and encourage tourist visitations, research shows that movies can spark an interest in its destinations resulting in them becoming tourist destinations. Therefore, destination marketing organisations (DMOs) have begun to involve themselves in pre- and post-production stages, firstly to market their destination as a filming destination and later to market the movie destination to tourists. The purpose of this thesis is to help Slovenian DMOs understand whether film-induced tourism has positive effects on the tourist industry. The question which this thesis will be answering is: To what extent can film-induced tourism positively affect Slovenia Tourism? The empirical part of this study involved 9 expert interviews which were later analysed using content analysis. The results suggest that the movie industry has some positive short-term effects on the destination. These mainly occur when the production crews are in Slovenia, and they employ local workers and sometimes short-term tourist visitation also occurs after the release of the movie. However, no long-term effects were discovered. Based on the findings of this research, DMOs should not put their main focus on becoming a movie destination.

**Key Words:** film-induced tourism, tourism industry, film industry, Slovenia, tourism in Slovenia, destination awareness, travel intention, marketing campaigns

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# 1 Introduction

Film-induced tourism is a relatively new niche of research which boomed in the 1990s starting in the UK and USA and later developed interest in Australia, Asia and Europe (Connell, 2012). It is defined as “tourist visits to a destination or attraction as a result of the destination featured on the cinema screen, video or television” (Busby & Klub, 2001: 317). Even though the purpose of movies is not to induce tourist visitations, research shows that movies can indeed spark interest in the locations shown in movies and possibly become a tourist destination (Macionis, 2004). Therefore, destination marketing organizations (DMOs) have increasingly begun incorporating movie-based marketing techniques as well as made movie locations part of their touristic attractions. However, film-induced tourism does not only mean visiting a location where the movie was filmed. It takes several different forms and activities (Connell, 2012). A few examples of them are visiting studio sets, visiting movie specific theme parks, organized tours of film locations or celebrity homes and visiting film festivals or movie premiers.

Some specific examples of movie-induced attractions include the Hobbiton in New Zealand, the Wizarding World of Harry Potter and the Game of Thrones studio tour. The Hobbiton set in New Zealand is based on the trilogy of the movies, the Hobbit. The Hobbiton offers many different experiences such as a Hobbiton movie set tour where visitors are able to visit the hobbit holes, the Mill as well as the Green Dragon Inn where they can be served with complimentary beverages (*Hobbiton™ Movie Set Tours*, 2016). They also offer other experiences such as an Evening Banquet tour or a Second breakfast tour where visitors have the chance to feast like the Hobbits in the movie. In addition, they also have International Hobbit Day and a Hobbiton Beer Festival where visitors can spend the entire day or evening on the Hobbit set living their life of a hobbit (*Hobbiton™ Movie Set Tours*, 2016). Similarly, Northern Island, where the filming of Game of Thrones took place, is now used as a touristic attraction. The Game of Thrones Studio tour offers a viewing of the imagery, sets, original props and costumes for its visitors as well as a chance to test their acting skills in an interactive screen experience (*Game of Thrones Studio Tour*, 2022). A different example of a movie-inspired attraction is The Wizarding World of Harry Potter which is a themed area part of the Universal Orlando Resort which consist of rides, shows,

entertainment, dining as well as shopping based on the Harry Potter movies (*The Wizarding World of Harry Potter*, 2022).

To date, a lot of research has been conducted on film-induced tourism and the different motivations which inspire travel to certain movie destinations (Busby et al. 2001; Connel, 2012; Hahm et al, 2010; Hudson, 2006; Macionis, 2004; Wen et al., 2018; Yang, 2011). There is also quite a lot of research which discusses how a specific movie has influenced the locations introduced in it (Hudson et al., 2011; Till & Shrimp, 1998; Wen et al., 2018). Hudson et al. (2011) discuss the immediate impacts of the movie *Motorcycle Diaries* on the perception of viewers from the US, Canada and Spain. The location portrayed in the movie was South America and the results of the study show that a large percentage of the viewers got the desire to travel to the locations portrayed in the movie. Similarly, Till & Shrimp (1998) found out that a seaside village called Barwon Heads experienced an increase in demand through the success of a TV series called *Sea Change*. Wen et al. (2018) on the other hand, explored the impact of movies and TV dramas on Chinese tourists' international travel intentions. The results showed that Movies and TV dramas have a significant impact on Chinese tourists' travel intentions. However, there is not much research which discusses whether countries such as Slovenia, which have not played main roles as destinations in movies, are also affected by film tourism and if so, to what extent.

To close the knowledge gap, this thesis discusses the effect of film-induced tourism on Slovenia, a small European country with not a large amount of involvements in famous movies such as Hollywood. In 2014, Andrew De Lena conducted a SWOT analysis on Slovenian tourism which discusses Slovenia's strengths, weaknesses, opportunities and threats. He talks about many advantages such as the beautiful landscapes, good transportation, lower prices compared to neighboring countries etc. One of the main disadvantages of Slovenian tourism, however, is lack of public awareness and misperception of the country. People assume that there is a lack of things to do in Slovenia or that Slovenia is an underdeveloped country. He later suggests that a great non-traditional method of building awareness would be promoting itself for filming movies. In addition, Slovenia has started offering up to 25% of rebate for Film and TV production filmed in the country (Slovenian Tourist board, 2019). This will allow Slovenian tourism to address its disadvantages and

showcase its beautiful landscapes and historic towns, shining a spotlight on the little-known country.

Previous research indicates that film-induced tourism does have a positive effect on the destination country whether that is visiting the movie sites or creating a movie themes park (Araújo Vila et al., 2021; Connell, 2005; Hudson et al., 2011; Wen, 2018; Yang, 2011). Table 1, below, created by Hudson et al. (2006) shows the positive impact of visitor numbers or tourist revenue on locations displayed in certain movies. The SWOT analysis of Slovene tourism also indicates that film-induced tourism could be a great marketing strategy for Slovenian tourism because it complements its strengths and addresses its weaknesses (De Lena, 2014). Therefore, the objective of this thesis is to identify to what extent film-induced tourism can affect Slovenia in a positive manner. This will help DMOs decide how much money, energy and time should be spent on promoting Slovenia as a filming destination.

| Film or TV Series                  | Location                                 | Impact on Visitor Numbers or Tourist Revenue           |
|------------------------------------|--|--|
| Braveheart                         | Wallace Monument, Scotland               | 300% increase in visitors year after release           |
| Heartbeat                          | Goathland, North Yorkshire, England      | Three times the number of normal visitors in 1991      |
| Deliverance                        | Rayburn County, Georgia                  | 20,000 film tourists a year Gross revenues \$2 to 3m   |
| Dances with Wolves                 | Fort Hayes, Kansas                       | 25% increase compared with 7% for previous 4 years     |
| Close Encounters of the Third Kind | Devils Tower, Wyoming                    | 75% increase in 1975 20% visit now because of the film |
| Thelma and Louise                  | Arches National Monument in Moab, Utah   | 19.1% increase in 1991                                 |
| Field of Dreams                    | Iowa                                     | 35,000 visits in 1991 Steady increase every year       |
| Dallas                             | Southfork Ranch, Dallas                  | 500,000 visitors per year                              |
| The Lord of the Rings              | New Zealand                              | 10% increase every year 1998 to 2003 from UK           |
| Steel Magnolias                    | Louisiana                                | 48% increase year after release                        |
| Last of the Mohicans               | Chimney Rock Park, North Carolina        | 25% increase year after release                        |
| The Fugitive                       | Dillsboro, North Carolina                | 11% increase year after release                        |
| Little Women                       | Orchard House, Concord, Massachusetts    | 65% increase year after release                        |
| Bull Durham                        | Durham, North Carolina                   | 25% increase in attendance year after release          |
| Harry Potter                       | Various locations in U.K.                | All locations saw an increase of 50% or more           |
| Mission: Impossible 2              | National parks in Sydney                 | 200% increase in 2000                                  |
| Gorillas in the Mist               | Rwanda                                   | 20% increase in 1998                                   |
| Crocodile Dundee                   | Australia                                | 20.5% increase in U.S. visitors 1981 to 1988           |
| The Beach                          | Thailand                                 | 22% increase in youth market in 2000                   |
| All Creatures Great and Small      | Yorkshire Dales                          | Generated £5m for Yorkshire Dales                      |
| To the Manor Born                  | Cricket St Thomas, Leisure Park, England | 37% increase between 1978 to 1980                      |
| Middlemarch                        | Stamford, Lincolnshire, England          | 27% increase in 1994                                   |
| Four Weddings and a Funeral        | The Crown Hotel, Amersham, England       | Fully booked for at least 3 years                      |
| Mrs. Brown                         | Osborne House, Isle of Wight, U.K.       | 25% increase   |
| Notting Hill                       | Kenwood House, England                   | 10% increase in 1 month                                |
| Saving Private Ryan                | Normandy, France                         | 40% increase in American tourists                      |
| Sense and Sensibility              | Saltram House, England                   | 39% increase   |
| Pride and Prejudice                | Lyme Park in Cheshire, UK                | 150% increase in visitors                              |
| Cheers                             | Location in Boston                       | \$7m in unpaid promotional advertising each year       |
| Miami Vice                         | Miami                                    | 150% increase in German visitors 1985 to 1988          |
| Forrest Gump                       | Savannah, Georgia                        | 7% increase in tourism                                 |
| Troy                               | Canakkale, Turkey                        | 73% increase in tourism                                |
| Captain Corelli's Mandolin         | Cephalonia, Greece                       | 50% increase over 3 years                              |

Table 1: Film Tourism Impacts (based on: Hudson et al., 2006)

The contribution of this research will help Slovenian DMOs understand whether film-induced tourism has positive effects on the tourism industry and whether it is worth investing money and time in becoming a filming destination. The question which will be answered through this research is:

**To what extent can film-induced tourism positively affect Slovenian Tourism.**

The following section of the thesis will contain the literature review, where two main topics will be discussed. The first topic will discuss film-induced tourism in general, what exactly it is and what kind of film tourists exists. Within the topic of film-induced tourism, the push and pull factors are discussed (section 2.1.1) which allow the reader to understand how film induced tourism can be measured. Following the theory, destination awareness (section 2.1.2) and travel intention (section 2.1.3) are discussed in relation to destination placement in movies. The following section, 2.1.4 discusses the role of marketing campaigns regarding film-induced tourism and how marketing a movie destination affects the destination. Finally, the last part of the film-induced tourism literature (section 2.1.5) involves two specific examples of film induced tourism. The first one discusses the effect of movies and TV dramas on Chinese tourists' choices of international travel destinations and the second one discusses the marketing strategy for the trilogy movies The Hobbit, and how the marketing affected the movie destination. The second section of the literature review (section 2.2) discusses tourism in Slovenia and what they are doing regarding film-induced tourism.

Following the literature review is the methodology section (section 3) which discusses the research design, what interviews are and how they will be conducted. In addition, the interview questions chosen for the research are presented. Furthermore, the methodology sections include how the data will be collected as well as analyzed and finally research ethics are discussed in order to make sure that everyone participating in the research is respected.

After the methodology section, the data will be presented and analyzed using content analysis (section 4). Finally, conclusion will be drawn from the research and the research question will be answered.



## 2 Literature review

This section will discuss the literature which already exists regarding film-induced tourism as well as tourism in Slovenia. It will help the researcher understand the effects which the movie industry already had on the movie destination and what the main factors were which caused film-induced tourism.

### 2.1 Film-induced tourism

Film-induced tourism has become a great topic of interest for researchers and DMOs. Therefore, a lot of research has been conducted in the past few years, looking at the effects of film-induced tourism from different perspectives and by conducting different tests (Hahm & Wang 2010; Macionis, 2004; Yang, 2011). This section will discuss the push and pull factor theory to get a deeper understanding of the kind of factors which can encourage film-induced tourism. After that, factors such as destination awareness, travel intention and marketing campaigns will be discussed in more depth. Finally, two case studies will be presented; the first one showing the relationship between locations of watched movies and travel intentions and the second one presenting the most successful film-induced tourism location, New Zealand, in order to see what DMOs and film producers did in order to attract a large film audience to New Zealand.

There are three types of film tourists which have been introduced in this topics research (Macionis, 2004). The first type defines the Serendipitous Film Tourist who happens to be at a location which was portrayed in a movie and may or may not visit a movie attraction. The second type describes the General Film Tourist who doesn't go to a specific destination because of a movie but participates in film tourism activities when there. Finally, the third type of tourist is called the Specific Film Tourist who visits a certain location because of the movie. There is a diverse range of motivations which encourage the visitation of a movie site. These include: fantasy, escape, status, prestige, searching for one's identity, ego-enhancement, or vicarious experience (Macionis, 2004). These motivations differ at different stages of the film-induced-tourist spectrum. For example, a specific film tourist will place great

significance of visiting a film site for personal reward such as an increase in self-actualization. The general film tourist on the other hand could be more motivated by the novelty of visiting a film attraction, while a serendipitous film tourist could only be visiting a film attraction for social interaction with family or friends (Macionis, 2004).

### **2.1.1 Push and pull factor theory**

Macionis (2004) uses the Push and Pull factor Theory of motivation to examine the consumer perspective of film-induced tourism. Pull factors are motivations specifically related to the movie. Push factors on the other hand, are internal drivers encouraging tourists to visit a certain location.

Macionis (2004) introduces three concepts of pull factors; place, personality and performance to investigate whether different or distinct motivations induce or drive travel behavior. Place is probably the most obvious concept of a pull factor. A beautiful scenery or a unique landscape can quickly attract a viewer's eye and become a motivation for travel. The second concept, personality, might not be such an obvious pull factor however, research shows that people are drawn to the performance or the storyline of the movie by relating to the situation or the characters and wanting to put themselves in the physical place where the scene/movie was shot (Beeton, 2001). The final, third concept, Personality can relate to the character in a movie/series or the actor himself. Till and Shrimp (1998:18) state that "feelings towards a celebrity are expected to transfer to any endorsed brand through their power status and the recurring association". For this reason, DMOs use celebrities to promote their destinations.

As already mentioned, push factors are the internal motivations of film-induced tourism. Some examples of push factors can be; ego-enhancement, status/prestige, fantasy/escape, search for self-identity and vicarious experience. These factors are explained in more detail in Table 2. Push factors are strongly interrelated with already discussed pull factors. For example, living out one's fantasy by visiting a location where a romantic movie scene was shot. The more that a tourist is on the Specific Film Tourist side of the spectrum, the more the internal drivers become important to fulfill (Macionis, 2004).


| Increasing interest in Film  |   |   |   |
|---|---|---|---|
| Type of Tourist   | Serendipitous Film Tourist  | General Film Tourist  | Specific Film Tourist   |
| Motivation  | <ul style="list-style-type: none"> <li>• Social interaction</li> <li>• Novelty</li> </ul> | <ul style="list-style-type: none"> <li>• novelty</li> <li>• education</li> <li>• nostalgia</li> </ul> | <ul style="list-style-type: none"> <li>• self-actualization</li> <li>• ego-enhancement</li> <li>• vicarious experience</li> <li>• self-identity</li> <li>• fantasy</li> <li>• status</li> <li>• romance</li> <li>• nostalgia</li> </ul> |

Table 2: Spectrum of film-induced tourism (based on Macionis, 2004)

Both push and pull factors are important motivators for travel and they should not be seen independently but interrelated (Macionis, 2004). It is also suggested that the more a tourist is on the specific film tourist side of the spectrum (shown in table 2), the more important the push and pull factors become motivations to visit a movie destination.

A study by Kim (2010) suggests that the viewing of a TV series not only creates personalized memories and attachments to the film location but also inspire film tourists to strengthen their film tourism experiences by re-enacting scenes from the TV show (push factors). Becoming a film tourist can fulfil a significant amount of emotional investment into the TV show. Furthermore, film tourists tend to create an emotional connection between themselves and the film location to recall the emotions which they have experienced through the viewing of the show, specifically focusing on fantasy, nostalgia, memory and emotion (Kim, 2010).

According to Kim (2011), the Hallyu phenomenon increased international tourists arrivals to Korea, specifically in locations associated with Korean TV dramas. The Hallyu phenomenon, refers to Korean-generated popular cultural products that includes TV dramas, movies, popular music, computer games, food and fashion (pull factors) penetrating the South-East and East Asia markets (Kim, 2011). The study suggest that 1 in 7 inbound tourists would be considered a film tourist. This would mean visiting locations and sets of the visitors favorite TV dramas. The two most

popular film tourist locations are the Nami Island which is a location from a romantic movie called Winter Sonata and the second location is the Daejanggeum theme park which is the film set of the movie Daejanggeum (Kim, 2011).

### **2.1.2 Destination Placement and Destination Awareness**

Destination awareness is one major objective in most film-induced tourism research because it is the first step in figuring out whether movie viewers pay any attention to the locations portrayed in the movies. Even though researchers take many different approaches on finding out whether viewers are aware of a movie's destinations, they all indicate that viewers do pay attention to the locations in the movies and are aware of its destinations (Araújo Vila et al., 2021; Connell, 2005; Yang, 2011).

Movie transportation is a key indicator of knowing whether a viewer is aware of a movie's destinations or not. "Movie transportation is defined as the state of immersion into a movie." (Yang, 2011:2). Transportation means imagery, affect and attention focus and includes three main concepts: cognitive engagement, emotional engagement and mental imagery (Green & Brock, 2000). Yang's (2011) study shows that movie transportation had a significant impact on viewers' place image and visitation interests (which will be discussed later). Regardless of the movie genre, the more that the viewers were transported the more they were aware of the touristic destinations portrayed in the movie causing them to have a bigger interest in traveling to that destination. Findings also show that movie transportation has much more effect on place image and travel interests than movie genres (Yang, 2011). People that were highly transported did not show any difference in interest of destination depending on genre while people that were not transported did.

A study by Kim (2011) was conducted to explore the extent that audience involvement/engagement with TV series affects the on-site film experience at the film location. The results suggest that the viewer's emotional as well as behavioral involvement were the main drivers which positively affected their film tourism experiences. In addition, the results identified that the more a viewer was emotionally involved into the show, the higher the chance became for them to visit the movie destination (Kim, 2011).

Araújo Vila et al. (2021) discuss that movies which put emphasis on the location depicted in the movie attracts domestic customers to its destination. By raising awareness of the location, viewers receive “pull” motivations to be able to experience the places, people and personalities depicted in the movies and compare their mental image with the real location. Furthermore, Connell (2005) discusses that children and even toddlers also want to experience locations which are displayed in children’s movies and series.

Destination awareness is a crucial goal in film-induced tourism (Araújo Vila et al., 2021; Connell, 2005; Yang, 2011). Without being transported into the movie and emphasizing movie locations, viewers will not be able to know where the movie was shot or could possibly not even realize the beauty of the location. Therefore, it is very important that DMOs and movie producers work together to ensure that the most attractive features of a location are portrayed and that the attractions are suggestive enough to attract a viewer’s attention as well as interest (Araújo Vila et al., 2021). They must also make sure that the location is easily depictable once a viewer and potential tourist is interested.

### **2.1.3 Destination Placement and Travel Intention**

Travel intention is the most widely discussed topic in film-induced tourism research because it helps understand whether film-induced tourism should be considered its own genre of tourism and whether DMOs should be spending time and money on creating marketing campaigns for movie destinations. Even though movies are not strong destination attractors on their own, they contribute to destination awareness and play a subtle but crucial role in creating tourist interest (Araújo Vila et al., 2021). However, all studies conclude that after watching a movie, travel intentions to the movie destination increase (Araújo Vila et al., 2021; Hahm & Wang, 2010; Hudson et al., 2011; Yang, 2011) Furthermore, there are different factors which might strengthen or weaken the travel intention.

Araújo Vila et al.’s (2021) study discusses the reasons behind the decision to visit a destination seen in a TV series. More specifically, they considered two aspects of travel decisions: destination awareness and visit motivation. They chose to analyze TV series because they have loyal audiences which make them a great target for

promoting attractive destinations. A questionnaire was created for domestic tourists during the visitation of a destination depicted in Spanish TV series which were shot in different parts of Spain (Araújo Vila et al., 2021). The survey consisted of two main sections. The first section involved collecting sociodemographic characteristics of the respondents, which include age, gender, education, occupation, monthly salary as well as the number of household members. The second section was made up of 5-point Likert scale questions on the topic of destination awareness and visit motivation. The participants had to indicate to what extent they agree with the statements. The survey also consisted of a yes/no question which asked whether the participants have already traveled to a destination due to seeing it in a TV series. This allowed the researcher to divide the participants into two groups, (1) movie tourists and (2) non-movie tourists (Araújo Vila et al., 2021). The results of their study suggest that both destination awareness as well as visit motivation significantly affect the decision to visit a TV series destination, the effect of destination awareness being stronger.

Similarly, Hahm & Wang (2010) examined the effects of a movie (*Lost in Translation*), which was filmed in Japan, on its image and travel intentions by conducting a one-group pretest-posttest quasi experiment. The study was conducted with pretest and posttest surveys which consisted of 5-point Likert scale questions as well as open-ended questions. The scale questions were used to find common, attribute-based components of the destination's image while the open-ended questions were used to explore the unique images which could not be seen by asking only scale questions. The study was conducted on undergraduate students at southeastern university in the US (Hahm & Wang, 2010). The results of the study show, that a film can significantly impact the respondents' perceived image of Japan, positively as well as negatively. The viewing of the movie also strengthened the intention to travel to the movie destination in the near future.

Just like Hahm & Wang (2010), Hudson et al. (2011) also discuss the immediate impact of a movie on the destination's perception by conducting a pretest-posttest survey. In this case, Hudson et al. (2011) chose the movie *Motorcycle Diaries* which is located in different countries of South America. They decided to survey students from different countries to see if there was a relationship between cultural background and motivation to travel. They chose students from the US, Canada and Spain. A survey

was conducted asking (1) 7-point Likert scale questions regarding cognitive attributes of South America and (2) questions regarding the impact of product placement of the movie. Participants who responded that the movie inspired them to travel to South America were also asked what motivated them to be inspired, place, personality or performance (Hudson et al., 2011). The results of the study suggest that the movie did change the perceived image of South America. A large number of respondents felt inspired to travel to the movie destination, with Canadian students showing most interest and Spanish students the least interest. From those who were motivated to visit the movie destination, they were most inspired by the landscape, scenery and cultural attractions (Hudson et al., 2011).

Yang's (2011) study, just like all of the above, explores the influence of movies on the viewers perception of the destination as well as travel intention. Unlike the other studies above, this study concentrates on (1) figuring out whether movie genres have an effect on the destination's perception as well as travel interest and (2) how movie transportation affected the relationship between the watching of the movie and tourism interest. The results of the study show that violent crime movies had a negative impact on the destination's image right after the movie's viewing, however, a romantic drama did not really generate positive destination image. Furthermore, the study discovered that movie transportation had a great impact on the image of the destination as well as travel intention, regardless of the genre of the movie. The more the viewers were transported the higher the travel interest (Yang, 2011).

Hahm and Wang's (2010) suggest that watching the movie strengthens an already existent interest in the destination as well as the intention to visit the destination in the near future rather than having direct impact on the decision to travel to a destination. In addition, movie transportation is a crucial element in the strength of travel intention because if viewers are not highly transported into a movie, they can miss out on locations displayed in it (Yang, 2011). Sociodemographic characteristics also influence an individual's decision to travel to a movie destination, the main ones influencing likelihood to travel are a high monthly income and being retired (Araújo Vila et al., 2021).

Movies can, however, not only strengthen or weaken an intention to travel but completely change a viewer's perception of a location (Hudson et al., 2011). Viewers

can have a specific opinion about a location without ever seeing it or being there therefore, movies are a great way to change someone's mind or open their eyes about a specific destination and obtain a new desire to travel to those locations (De Lena, 2014).

Travel intention also evokes different push factors which encourage viewers to travel to a movie destination. Two of the most influential push factors are: (1) Comparing mental images with the reality of the destination and (2) having first-hand experience in a location where a movie was filmed and where the cast and producers have been (Araújo Vila et al., 2021).

Children are a big factor in choice of travel destination and therefore should also be considered in film-induced tourism (Connell, 2005). Thornton et al. (1997) discuss that even though parents make the final decision, they rate their children's satisfaction higher than their own and therefore want to travel somewhere where children can be amused. This can include a children's movie destination where activities are adapted to children's needs. An example of such would be Disneyland/Disneyworld where activities are adapted to children's favorite movies/cartoons. Another example, which is more specifically based on film-induced tourism would be the show Balamory which is filmed in Mull, an island in Scotland and is known for the colorful houses displayed in the children's show. The study by Connell (2005) suggests that children wanted to travel to the location and see where the characters of Balamory lived. An additional research was conducted by Connell and Meyer (2009) regarding visitation to Tobermory in relation to the Balamory movie. The study shows that 69% of the studies respondents stated that they only came to visit Mull because of its role in Balamory. Furthermore, the results indicate that Balamory attracted a large number of specific film tourists even though there was very little promotion of it at the time. The statistics from that research show that 34% of the respondents only came to Mull to see Balamory, 36% responded with visiting Balamory and to explore Tobermory, only 14.5% were general tourists and said they came to visit Balamory and other parts of Mull and an even smaller percentage, 14% were serendipitous tourists who replied that they went to Tobermory as part of visiting the island Mull (Connell & Meyer, 2009).



#### **2.1.4 The role of Marketing Campaigns**

Specific film tourists are a small market, only 10.4% of viewers travel to a destination just because it was displayed in a movie or TV series. Therefore, marketing campaigns are very important in raising more awareness about film destinations and convincing more tourists to visit. It is however important for DMOs to consider the needs of the destination economy in parallel with respecting the integrity of the destination's community and environment (Thornton et al., 1997).

DMOs are increasingly working with film producers to create film-inspired marketing campaigns (Araújo Vila et al., 2021; Frost, 2010; Thornton et al., 1997). Frost (2010) suggests that attractive scenery is not enough to pull viewers to visit a movie destination. The main motive is the viewers' empathy with the storyline and the characters. What makes the motivation to travel even stronger is recurring storyline patterns in different movies which 'promise' the same things (Frost, 2010). An example of this would be the Australian Outback. It is portrayed in many movies as the exotic location which will change the viewer. In most cases, it is changing from a boring, frustrated, stagnant person to a re-energized, tolerant, and possibly even spiritually uplifted person (Frost, 2010).

Araújo Vila et al. (2021), discuss the pull factors of film-induced tourism and suggest that advertising is the most influential pull factor. Furthermore, marketing opportunities can be found at all stages of movie production: preproduction, during production, before release as well as after the release of the movie. Hudson et al. (2006) created a model showing all the factors which go into exploiting marketing opportunities, which is displayed below in table 3.

| Destination marketing activities before release of movie                                | Destination marketing activities after release of movie   |
|---|---|
| Appoint an executive or public relations specialist to deal with film studios directly  | Invite travel media to special release of the film  |
| Actively promote the destination to film studios  | Post signage and interpretation at the location   |
| Offer grants and tax credits to encourage studios to use the location                   | Sell film memorabilia   |
| Be actively involved in location scouting   | Replicate or maintain film icons/sites/scenes/ sets to maintain authenticity                        |
| Plan carefully to maximize the impacts of post-production exposure                      | Host events that continue the pull of the film beyond its natural audience peak                     |
| Carefully assess a film's merit in terms of its promotional value                       | Develop a dedicated Web site for potential tourists   |
| Negotiate end credits for the destination   | Post links on Web site to film tours run by local tour operators                                    |
| Negotiating and/or produce a "making of the film" feature                               | Engage in joint promotional activity with inbound tour operators                                    |
| Engage the film's stars to promote the film location                                    | Package additional attractions to lengthen tourist stay   |
| Provide images for media or tour operators to use in promotions (on cd rom or Web site) | Work collectively with other public organizations and tourist authorities to promote film locations |
| Ensure media coverage of the film mentions the film location                            | Promote hotels and guest houses that were used in films   |
| Invite travel media to film location  | Engage in joint promotional activity with film companies  |
| Sponsor the film directly   | Create electronic links to the destination on the film Web site                                     |

|  |   |
|--|---|
| Plan activities to promote other tourism sectors such as art, crafts, food, wine, music, and fashion | Have guided tours and /or film walks                        |
|  | Produce film and site maps for tourists                     |
|  | Create exhibitions or displays of memorabilia from the film |

Table 3: “A model for exploiting film marketing opportunities” (based on: [Hudson et al., 2006])

In the preproduction stage, it is very important for DMOs to get involved in promoting their location to film producers, by offering cash or tax rebates and other competitive advantages because this can have positive impacts on the destination in the long term (Hudson et al. 2006; Li et al., 2017). For example, VisitBritain targeted Bollywood film producers by persuading them to use British location for their films in hopes of generating significant economic impact for the British tourism industry. Some destinations, such as Canada, Bahamas and Chicago, also involve public relation or product placement specialists to get their destinations placed in movies. It is also important for DMOs to get involved in location scouting which can benefit them by having control over which locations they show (Hudson et al. 2006). Furthermore, they can also give some benefits to the production companies such as paying all the scouting expenses for the directors, which is what the Swiss Tourism Board did for top Bollywood directors because Bollywood movies stimulated a lot of Indian tourists to visit.

During the production of a movie, there are many opportunities to create publicity of a destination, especially with high profile films (Hudson et al. 2006). DMOs should work closely with the producer’s publicists to ensure consistent messaging of the destination. When filming the Lord of the Rings in New Zealand, for example, media outlets mentioned the destination that the movie was being filmed in, providing a linkage between the movie and the destination, early in the production process (Li et al., 2017). In addition, the movie’s stars were promoting the destination by praising the island, its fashion as well as its cafés.

Before the release of a movie DMOs can create marketing partnerships and prepare marketing materials in relation to the movie (Hudson et al. 2006; Li et al., 2017). VisitBritain, for example, partnered with Sony and Columbia Pictures before the release of the movie *Closer* which was filmed in London and starred Jude Law, Julia Roberts and Clive Owen. On the VisitBritain website they offered a *Closer* movie map which displayed all the iconic London locations found in the movie. Movie locations and attractions also collaborated with VisitBritain to offer discounts which came with the map (Araújo Vila et al., 2021; Hudson et al. 2006). Another example includes a partnership between Tourism Australia and film director Baz Luhrmann who created a 35-million-dollar international marketing campaign prior to the release of the movie *Australia*. The video's goal is advertising the impacts of the Outback which are also featured in the movie (Araújo Vila et al., 2021; Frost, 2010). Furthermore, the video is a short film of the transformation a woman experiences after visiting the outback. In the beginning of the video, she is very unhappy, she gets broken up by her boyfriend because she became a workaholic and lost herself in the process. Then she is visited in her dream by a child from the outback who says, "sometimes we gotta go walkabout" (GetPromotion, 2008: 0:39). After she take the trip, she finds herself again, and leave the outback as herself and not just the executive VP of sales. This can be seen in the screenshots below in Figures 1-4. In addition, they also created a 68-page magazine special for the Australian Newspaper, celebrating the movie and the country for the domestic tourists.

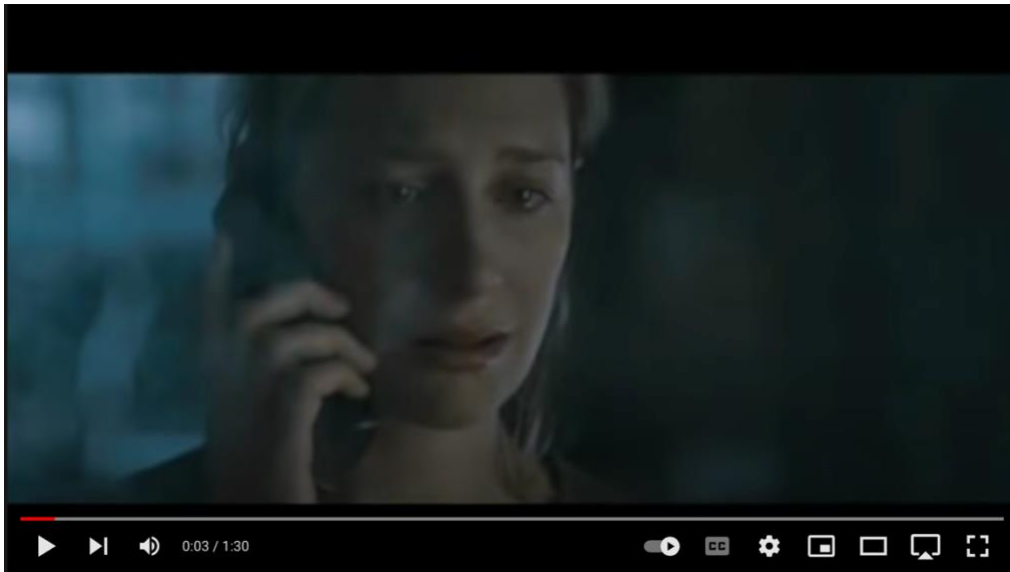


Figure 1: : “Australia” marketing campaign: Unhappy Kate (based on: [GetPromotion, 2008])



Figure 2: : “Australia” marketing campaign: Visited in her dream (based on: [GetPromotion, 2008])



Figure 3: "Australia" marketing campaign: arriving at outback as executive VP of sales (based on: [GetPromotion, 2008])



Figure 4: "Australia" marketing campaign: Leaving as Kate, happy again (based on: [GetPromotion, 2008])

During the screening of a movie, DMOs should also be involved in promoting the movie destination. Examples of these can be as simple as offering postcards of the movie destination in the cinemas when the movie is screening, which is what the Scottish Tourism Board did when the movie Braveheart was screening, or it can include partnerships and heavy marketing campaigns (Hudson et al. 2006). An example of that would be the Tourism Authority of Thailand, which heavily advertised

their attractions during the release of the movie *The Beach* by partnering with 20th Century Fox, as well as offering holiday prizes on a BBC game show which was themed around the movie (Hudson et al. 2006).

After the release of a movie, it is time for DMOs to convert the movie audience into commitment for future visit of the movie destination (Hudson et al. 2006). There are many directions which DMOs can take in order to capitalize on visitors who are brought to a destination by movies. These can include collaborative campaigns with the film industry, creating movie maps (as already mentioned above), offering guided tours and film walks to creating whole theme parks (Hudson et al. 2006). For example, VisitBritain (2022) offers a “Film and TV” section on its website which is dedicated to movies filmed in the UK and mentions the locations which were seen in each movie, giving visitors the chance to visit their favorite movie’s locations. Furthermore, Brit Movie Tours (2022) offers different types of guided tours of movies filmed in the UK.

Hotels, guest houses, attractions and museums which are displayed in movies are often also promoted to the public in order to generate tourism (Hudson et al. 2006). An Outback pub in the Silverton hotel in Australia has been featured in over 130 feature films, music videos and commercials and is now a touristic attraction. The walls and the verandah of the pub are filled with movie and celebrity memorabilia and the outside of the pub provides a photo opportunity for the guests with a replica of the police car from *Mad Max II* (Frost, 2010).

Even though film tourism offers fantastic marketing opportunities, it is very important to consider the locations environment, community, and capacities (Thornton et al., 1997). For smaller destinations DMOs must take care that marketing campaigns do not exceed maximum capacities and endanger the resources, attractions and communities provided by the location. DMOs must also maintain a balance between traditional tourist activities and maximising their new opportunities in order to keep both markets satisfied (Thornton et al., 1997).

### **2.1.5 Case Studies**

This section will discuss two different case studies to help the reader understand film-induced tourism more thoroughly. The first study discusses the connection between the locations of movies watched and the top three locations participants would most

like to travel to. This study gives a practical example of whether movies have any effect on travel intention. The second case study gives a practical example of the effects of marketing of the movie destination. This is very important for the reader to understand whether marketing is important in film-induced tourism or not.

### 2.1.5.1 *China Case Study*

A study was conducted in China to explore the effect of movies and TV dramas on Chinese tourists' choices of international travel destinations (Wen et al, 2018). They used an online survey tool to reach as many Chinese consumers as possible. The results of the study showed that the Chinese population is highly involved in international travel and that they love movies and TV dramas. A large number of the consumers that engaged with movies and TV dramas were also motivated to travel to movie destinations. The food, fashion and lifestyle of these destinations were strong motivators for Chinese tourists to travel to those locations.

Figure 5 shows how many of the participants watched movies that were shot in the following locations. 29.7% of the participants watched movies that were shot in Thailand, 7.8% were shot in Hong Kong, 5.3% in France, 5% in the US, 4.4% in Italy and 4.3% in Korea. According to this data, the participants mostly watch movies that are shot in Thailand.

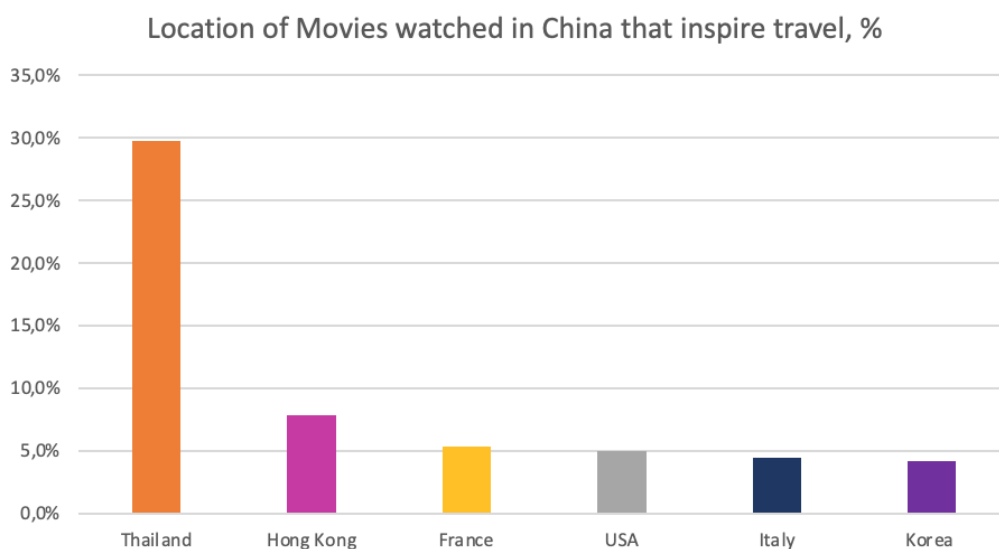


Figure 5: Locations of top watched movies by the participants on the study (based on [Wen et al, 2018])



Figure 6 shows the responses of the question: “What are the top three locations that you would most like to travel to?”. The pie chart shows that 31% of Chinese tourists would most like to travel to South Korea, 30% to Thailand, 28% to the USA, 22% to France, 20% to Japan, 9% to the UK and 7% to Italy.

Locations Chinese tourists would like to visit, %

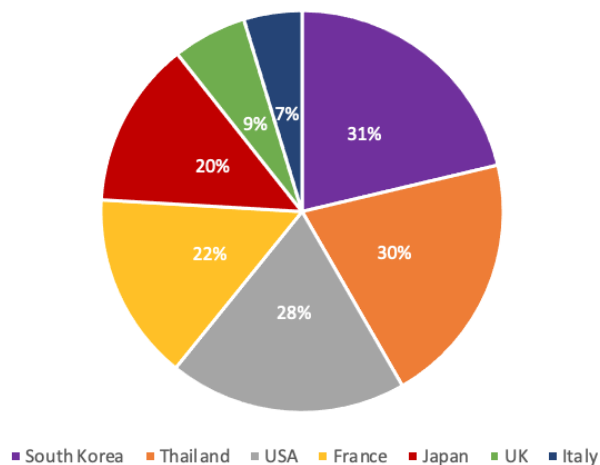


Figure 6: Locations that Chinese tourists would like to travel to the most study (based on [Wen et al, 2018])

From the figures, it can be concluded that the locations to which Chinese tourists would most like to travel to are greatly impacted by the movie’s locations. Even though the movie locations do not directly imply visitation interests, all the locations that are shown in movies and TV dramas are also mentioned as locations that the tourists would like to travel to the most. The only exception is the UK, which is not played in any of the most watched movies but is still a destination which Chinese citizens would like to visit. The study also shows that France is viewed as a romantic destination, Korea, USA, and Japan are best for shopping and Thailand was known for the most beautiful landscapes and historical sites. This shows that Chinese tourists have different pull factors as motivators for travel (Macionis, 2004).

It is, however, important to know that specific film tourists are a minority, only 10.4% of viewers travel to a destination just because they have seen in it in a movie or tv series (Araújo Vila et al., 2021). Therefore, more has to be done by DMOs to promote

the locations and create movie-induced attractions for tourists to visit at the destination.

### **2.1.5.2 The New Zealand Case Study**

The most successful film-induced tourism destination is New Zealand with the Lord of the Rings and the Hobbit movies due to their extraordinary marketing activities. The Hobbit movies have increased New Zealand's tourism receipts by 771.80 million US dollars and have contributed to welfare gains of 186.24 million dollars (Li et al., 2017).

The tourism and economy of New Zealand was not significantly affected by the Lord of the Rings trilogy because they did not invest into proper marketing strategies. Therefore, the Lord of the Rings movies only increased tourist visitations to the film set but did not impact the overall tourist arrivals to New Zealand (Li et al., 2017). The Hobbit on the other hand had a significant positive impact on New Zealand's economy due to a proper implementation of marketing strategies during and after the movie release. An important strategy in marketing film-induced tourism destinations, is creating an iconic and unique concept like Middle Earth for the Hobbit, shown below in Figure 7.



Figure 7: Middle Earth (*Hobbiton™ Movie Set Tours*, 2016).

The partnerships established between the government, tourist agencies and the creative industry majorly strengthened the tourism and economic benefits brought to New Zealand. The government expanded the national film subsidy program which allowed the Warner Bros studios to get a 25-million-dollar tax rebate (Li et al., 2017). In addition, Air New Zealand launched a Hobbit themed airplane, Crystal Cruises created a cruise itinerary which involved a tour of the Hobbiton set including a chance

to dine at The Garden Inn (the hobbits drinking hole which is now a pub) and Trailfinders introduced a Hobbit Express day tour from Auckland with the chance to visit Middle earth and the Hobbiton set (Kim, 2018). Furthermore, Air New Zealand and Tourism New Zealand partnered together and invested 20 million dollars in joint marketing activities (StopPress Team, 2014). One of the most successful marketing campaigns being the flight safety video called “elf and safety” which has reached 16 million views in the first week and can be seen below in figure 8 (Air New Zealand, 2014; Digital Marketing Case Study - Elf and Safety: Air New Zealand Gets into the Hobbit for Epic Viral Video - Digital Training Academy, 2012). The safety video not only includes the flight safety instructions but also the different characters and actors from the movie making it informative and fun to watch for all the Hobbit fans.

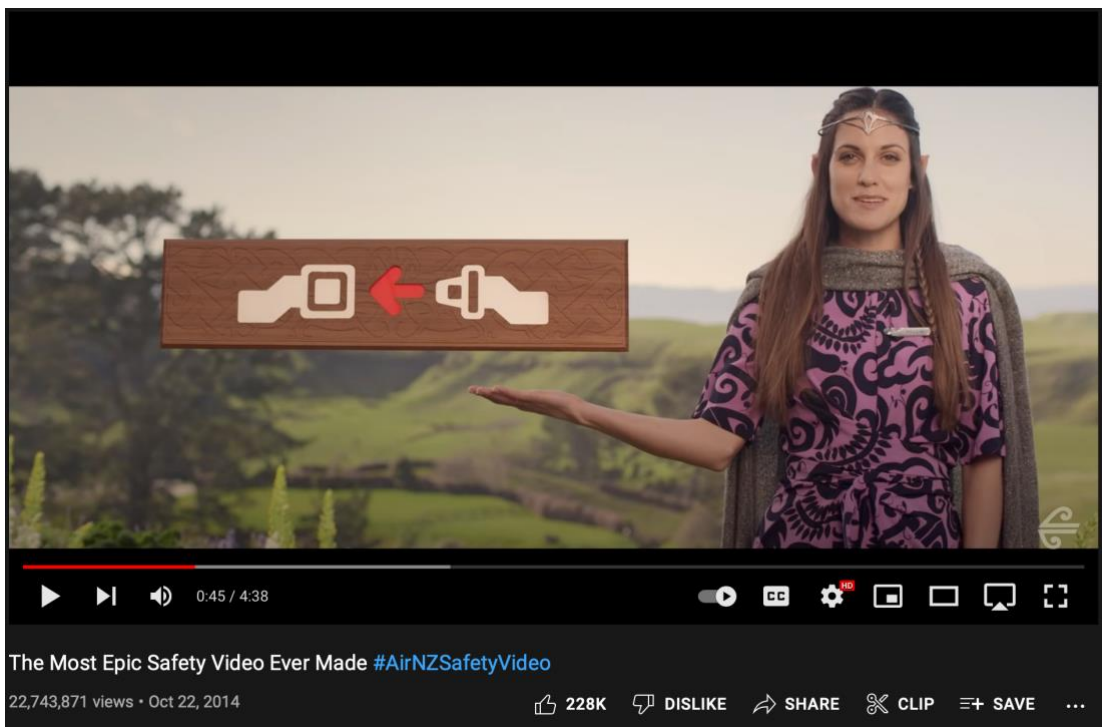


Figure 8: Elf & Safety video (Air New Zealand, 2014)

## 2.2 Tourism in Slovenia

Slovenian tourism has majorly developed through the last years. It has built a strong brand and put great focus on being a green destination. This section will discuss

Slovenian tourism in greater depth including their current goals and strategies as well as the SWOT analysis which has been mentioned in the introduction.

Slovenia has built a strong brand around the “I Feel Slovenia” slogan. Its main attributes being; the green label and the unique experience label (The official travel guide to Slovenia. (n.d.)). Slovenia prides itself on being a green and sustainable destination where you can find “ancient forests, crystal clear waters, unspoiled nooks and remarkable biodiversity” (The official travel guide to Slovenia. (n.d.)). In 2020 Slovenia was one of the first countries to join the “Green & Safe” label which highlights high hygiene standards and protocols as well as sustainable recommendations for tourist service providers and locations.

This is however very new. In the past Slovenia struggled greatly with branding, creating and adding value to their product offerings, as well as poor management practices which were a major barrier in achieving destination competitiveness (Dwyer et al., 2012). Due to a lack of coordination between the different groups marketing Slovenia, promotional activities to foreign markets were very inconsistent causing confusion abroad as well as domestically (De Lena, 2014).

In order to succeed on the tourism market, a destination needs to communicate their unique features clearly and understandably. Slovenia is the only country in the world which allows for experiences in the Mediterranean, the Alps as well as the Pannonian Plain in such a small geographic location right in the heart of Europe (Ministry of Economic Development and Technology, 2017). De Lena (2014) also mentions some great strengths such as strong lodging, good transportation and good internet infrastructure. Its size is also very convenient because any remote, rural areas can be easily accessible, with a maximum two-hour drive, from urban areas. This is also a big ecological advantage because tourism infrastructure does not have to be built on site of any natural attractions, but people can stay in urban areas and still get to travel to any beautiful natural siting. It has to be taken into consideration that Slovenia being a small country could cause problems if tourism is not regulated well. One step which Slovenia has taken to avoid harming the environment is legal measures to protect its natural environment (De Lena, 2014).

Macro destinations are a great way to strengthen a destinations identity by dividing a countries products and services into large sectors which are geographically contiguous and share similar products and services. Slovenia is divided into four macro destinations (Ministry of Economic Development and Technology, 2017). The first destination refers to Mediterranean Slovenia which includes the green Istrian countryside, culinary delicacies, and delicious wine. The second location is called Alpine Slovenia and includes the breathtaking views, rivers, lakes, valleys, and activities such as cycling, skiing, and other outdoor adventures. The third destination is Thermal Pannonian Slovenia which includes hills, vineyards and castles in addition to thermal springs which is a great choice for relaxation and health. The final destination is Central Slovenia and Ljubljana, which includes culture and art as well as events, shopping, culinary experiences and so much more (Ministry of Economic Development and Technology, 2017). Slovenia is competitively priced which means that certain products and services are much cheaper than in other European countries (De Lena, 2014).

In addition, The Slovenian Film Centre and the Slovenia Tourist Board have collaborated to market Slovenia as a filming destination with the slogan “Drive less. Film Green. Film in Slovenia” (Slovenia Tourist Organisation, n.d.). The organization outlines four main advantages for filming in Slovenia. First, giving a 25% cash rebate for the realization of production. Second, that every location is less than a two-hour drive away. Third, that Slovenia has four different climates; alpine, subalpine, submediterranean and continental as well as four seasons in most of these climates. Finally, 84% of locals speak a foreign language with 70% speaking English.

### **3 Methodology**

The methodology of this thesis is divided into 4 sections. The first section will discuss the three different research designs and explain which research design was chosen for this thesis and why. The second section discusses expert interviews. More specifically, why this form of data collection was chosen, how the interviews will be conducted as well as with whom and finally a table of the interview guide chosen for this thesis will be presented. The third section will discuss in detail how the data will be collected and analyzed in order to answer the main research question. Finally, the fourth section will include research ethics.

#### **3.1 Research Design**

When it comes to collection of primary data there are three types of research designs; quantitative, qualitative and the mixed methods approach (Creswell, 2014). Qualitative research explores and tries to understand the meaning that individuals or groups assign to social or human problems. Data is typically collected in the participants' setting through open-ended interviews or case studies. Furthermore, data analysis is built from particular situations into general themes and from there, the researcher interprets the meaning of the data (Creswell, 2014). Quantitative research tests objective theories through examining relationships between variables. These variables are mostly measured with instruments in order to collect statistical data which can be analyzed using statistical procedures (Creswell, 2014). Finally, the mixed methods research approach involved collecting both quantitative and qualitative data which can involve philosophical assumptions as well as theoretical framework. The goal of this research design is to understand a research problem better if it cannot be done by quantitative or qualitative approach alone (Creswell, 2014).

For this study a qualitative research design will be used to collect primary data, through online expert interviews. A qualitative research design was chosen because the researcher is trying to identify a general understanding, from specific examples, of how film-induced tourism can positively affect Slovenia. Furthermore, expert interviews rather than a case study, were chosen because the researcher is not trying

to get focused and concrete details on the topic but a general understanding in order to help DMOs decide whether it is worthy to spend time and money on film tourism.

### **3.2 Expert Interviews**

The primary data will be collected through ten expert interviews. Expert interviews are normally face-to-face or telephone interviews which involve a small number of unstructured and mostly open-ended questions which investigate the research problem from various experienced perspectives (Creswell, 2014). Interviews are very practical when not being able to observe participants directly, they are also useful for gathering historical information and allowing the researcher to be in control over the line of questioning. Some disadvantages of interviews are receiving biased information and the information is not being gathered from natural setting but a designated place (Creswell, 2014).

The contact to interviewees will be established through personal connections and online research and they will be contacted via email. The interviews are conducted online through MS Teams or Zoom or answered via e-mail depending on the convenience of the interviewee. If possible, the interviews are conducted in English, however, the option of answering in Slovene will also be possible for experts which do not feel comfortable speaking English. The interviews are expected to be 20-30 minutes long with possible follow ups if needed. The researcher has chosen to contact members of the Slovenia Touristic Organization and Slovenian Film Center in order to get a general understanding of where Slovenia stands with film-induced tourism. To get into more depth and understand the effects of film-induced tourism, local touristic organizations are contacted where movies have already been filmed. These will include: Bovec, Bled and Ljubljana.

The interviewees will get the chance to answer 10 main questions regarding film-induced tourism in Slovenia. These can be seen in table 4 below. Each main question has at least one sub question (seen on the right side of the table) which will be asked in case the interviewees are not sure how to answer the question or in case they give a very short answer.

| Main Question   | Sub questions   |
|---|---|
| <b>How has film-induced tourism affected Slovenia?</b>                                      | <ul style="list-style-type: none"> <li>(1) Which movies were filmed in Slovenia already and in which locations?</li> <li>(2) Did they influence tourism? Positively? Negatively?</li> </ul>   |
| <b>How much have you marketed Slovenia as a movie destination in the past and how?</b>      | <ul style="list-style-type: none"> <li>(1) Have you done any marketing in regard to being a movie destination?</li> <li>(2) What did the marketing look like?</li> <li>(3) If not, is that something you are striving for?</li> </ul> |
| <b>Do you think Slovenia should become a movie destination? Why/Why not?</b>                | <ul style="list-style-type: none"> <li>(1) Do you think it should be marketed as a movie destination?</li> </ul>  |
| <b>How do you think Film induced tourism can affect awareness of Slovenia?</b>              | <ul style="list-style-type: none"> <li>(1) Do you think becoming a movie destination will increase destination awareness? Why?</li> </ul>   |
| <b>What can you do to turn destination awareness into travel intention?</b>                 | <ul style="list-style-type: none"> <li>(1) How can you attract potential tourists after the viewing of a movie?</li> <li>(2) How would you market the movie destination?</li> </ul>   |
| <b>Is there a specific movie genre which you are targeting? Why?</b>                        | <ul style="list-style-type: none"> <li>(1) Will some genres bring more awareness than others?</li> <li>(2) Can some genres have a negative effect on the destination?</li> </ul>  |
| <b>What strategies do you use to attract movie directors to Slovenia?</b>                   | <ul style="list-style-type: none"> <li>(1) Why is Slovenia better than other locations?</li> </ul>  |
| <b>How can film induced tourism positively affect Slovenia?</b>                             | <ul style="list-style-type: none"> <li>(1) What are the goals of becoming a movie destination?</li> </ul>   |
| <b>How can film induced tourism negatively affect Slovenia?</b>                             | <ul style="list-style-type: none"> <li>(1) What are potential negative effects?</li> <li>(2) What do you need to take care of in order to avoid negative effects?</li> </ul>  |
| <b>In your opinion, do you think Slovenia should focus on becoming a movie destination?</b> | <ul style="list-style-type: none"> <li>(1) Will the positive effects outweigh the negative?</li> <li>(2) Will destination awareness increase?</li> <li>(3) Will tourism to movie destination increase?</li> </ul>                     |

Table 4: Interview Questions



### **3.3 Data Collection and Analysis**

If the interviews were to be conducted via MS Teams or Zoom, they were recorded and later transcribed. If the information was received by email it was translated if necessary and later analyzed.

After the data collection, data was analyzed using content analysis. In qualitative research it is very important to be selective of the data that will be used in the analysis because in interviews a lot of information can be gathered and often some information is not necessary for the specific research (Creswell, 2014). After the gathering of the raw data, the information will be organized and prepared for analysis by scanning any visual data received and typing up the interviewee's answers from the recordings (Creswell, 2014). In addition, if any of the interviews were conducted in Slovene, they will be translated to English.

The content analysis process will begin with inductive data reduction (Mayring, 2000). This means that the data will be categorized and coded during the process of coding and not before. A code sheet will be created where a list of different themes and codes will be written in order to have an overview of all the relevant topics which are needed for data analysis. After that the researcher will move onto building theories, meaning finding relationships between data collected and previously researched data. In content analysis it is very important to go over all the coding multiple times to remove any irrelevant data and avoid any overlapping codes. After the coding is done, the data will be summarized displayed in tables and diagrams for a clearer understanding of the analysis (Creswell, 2014). Finally, the data will be verified by checking for common biases.

### **3.4 Research Ethics**

The data collection begins with an email to the potential interviewee which always gives them a chance to not reply or say that they are not interested in participating in this thesis. In addition, if the interviewee decides to take the interview but wants to be kept anonymous during the study, their decision will be respected, and their name or position won't be mentioned in the thesis. Furthermore, if the interviewee does not know the answer to a question or does not want to answer they are given the possibility to leave the question out in order not to get false data or any data which

should not be shared. The researcher is also transparent with the interviewees by stating the purpose of the data collection at the beginning of the interaction, in the email.

## 4 Results

This section focuses on the results and the data analysis of the expert interviews. In total nine interviews were conducted, with two people from the Slovenia Touristic Organization, one person from the Slovenia Film Center, two people from two different production companies in Slovenia, three people from Soča Valley Tourism board as Soča Valley is the most used location for filming in Slovenia and finally one person from VisitLjubljana as Ljubljana is the capital city of Slovenia and was also included in some movies.

After the interviews were conducted content analysis was used to code the interviews into different factors and categories which can be seen in table 5 below. The data was divided into five factors; destination awareness, travel intention, marketing, effects on Slovenia and Slovenia in general in relation to film-induced tourism. Each factor is divided into a few categories. Destination awareness is divided into the following three categories: characteristics bringing positive awareness to destination, characteristics bringing negative awareness to destination and characteristics bringing no awareness to the destination. Travel intention is also divided into three categories. These include creating film tourism experiences, success of a movie and experiencing scenes from a movie. The factor marketing campaign is divided into preproduction, post-production, and marketing difficulties. Effects on Slovenia is divided into 6 categories which are: economic impact, environmental impact, social impact, promotional impact, tourism industry impact and no impact. Finally, the factor Slovenian in general is divided into two categories which are advantages and disadvantages that Slovenia has in regards to film induced tourism.

| Factors               | Definition  | Category   |
|-----------------------|---|--|
| Destination Awareness | Being aware of a destination displayed in a movie                         | <ol style="list-style-type: none"> <li>1. Characteristics bringing positive awareness to destination</li> <li>2. Characteristics bringing negative awareness to destination</li> <li>3. Characteristics not bringing awareness to destination</li> </ol> |
| Travel Intention      | Intention to visit the destination displayed in a movie                   | <ol style="list-style-type: none"> <li>4. Create film tourism experience</li> <li>5. Success of movie</li> <li>6. Experiencing scene from movie</li> </ol>   |
| Marketing Campaign    | Marketing activities in relation to movie releases                        | <ol style="list-style-type: none"> <li>7. Pre- production</li> <li>8. Post – production</li> <li>9. Marketing difficulties</li> </ol>  |
| Effects on Slovenia   | How tourism has/can affect Slovenia                                       | <ol style="list-style-type: none"> <li>10. Economic impact</li> <li>11. Environmental impact</li> <li>12. Social impact</li> <li>13. Promotional impact</li> <li>14. Tourism Industry Impacts</li> <li>15. No impact</li> </ol>                          |
| Slovenia              | Advantages and disadvantages of Slovenia now, in relation to film tourism | <ol style="list-style-type: none"> <li>16. Advantages</li> <li>17. Disadvantages</li> </ol>  |

Table 5: Category System

#### 4.1 Slovenia

Before analysing what the effects of film-induced tourism are and how film-induced tourism can affect Slovenia, it is important to know what the experts mention as Slovenia’s advantages and disadvantages in relation to the film industry.

The expert interviewees mention multiple of Slovenia’s advantages which offer great benefits for filming crews and not many other countries or no other countries in the world can offer. There are two main advantages which were mentioned in multiple interviews. The first advantage is that Slovenia has four macro regions: the Alpine, the Mediterranean and Karst, Thermal Pannonian region as well as the Central Slovenian region (which include Ljubljana the capital city) all of which offer unique and distinct film settings. On one hand, Slovenia can offer locations which cannot be found

anywhere else in the world such as Postojna Cave or Velika Planina. On the other hand, it can also offer locations which are similar to other destinations and can therefore be used as a representation of another destination. These include the alps and the European historic architecture in Ljubljana. The second most discussed advantage during the interviews is the short distances between the different locations. The most distant filming locations are a maximum of 2 hours away from Ljubljana, the centre of the country. In addition, this allows producers to film in different locations in one day which is extremely convenient for the film crews. Another advantage that was mentioned during an interview, for filming in Slovenia include providing logistical and technical support as well as a wide range of highly skilled film makers, film experts, artisans, and assistants.

During the interviews, however, the interviewees also mentioned some disadvantages of Slovenia as a filming destination. The disadvantages include Slovenia being a very small market compared to its competitors and not having enough movie studios to become a well know movie destination. In addition, it has been mentioned a couple of times that the Slovenian movie funds are not big enough to attract large movie producers.

There was also a conflict between interviews because some interviewees mentioned that Slovenia doesn't know the full potential of film-induced tourism while the Slovenian Touristic Organisation mentioned that in 2018, they conducted a workshop on film-induced tourism learning the benefits and opportunities that the film industry can bring to the destination.

## **4.2 Destination Awareness**

Destination awareness is the first and most important factor when it comes to film-induced tourism. If destination awareness is not achieved through the viewing of a movie, film tourism cannot occur. Most interviewees agree that film-induced tourism brings some sort of awareness to the destination, however, there is many factors which must fall into place in order for that to happen. The one major factor which was mentioned in most interviews is that the destination must be mentioned in the script of the movie. Without that, viewers cannot know where the movie was shot. In addition to that, it is also important to show the main attractions of the destination

which are worth traveling for. A Korean telenovela which was mentioned in a couple of interviews was shot in Soča Valley. The storyline of the movie mentioned the name of the destination and the series involved Soča Valley's greatest attractions. The following year Koreans were in the top three in number of tourists in Slovenia.

There are three other factors which were mentioned during the interviews which can bring even more awareness to the destination. The first factor is commercial movies. These are movies that are made to be famous on Netflix or are expected to be widely watched in the cinemas. Since these types of movies gain a lot of traction, awareness of the movie destination can be widely spread. This is however not possible to plan for, it's a factor of luck. The second factor which can attract more awareness is presenting the destination as a "fairy tale land". In this case everybody wants to see whether a destination like this really exists in the real world and there is higher interest in wanting to visit it. The third type of film which can more awareness to the destination is an environmental documentary. These specifically talk about certain destinations or areas and do not have a story which overshadows the location.

Opinions regarding negative awareness were very mixed between the interviews. Some interviewees said that movies cannot bring negative awareness to a destination, and some said that they can. The most mentioned factors which could bring negative awareness to the destination were negative storylines about the destination and by presenting the destination in a dark or scary way. However, due to the cash rebate which will be mentioned in more detail at a later stage, movie script go through the Slovenian Film Centre, allowing them to change or reject any movies or scenes which could negatively affect the destination.

Furthermore, many interviewees also discussed factors which bring no awareness to the destination. This mainly occurs when the movie doesn't state the destination in the script. Often times, especially with Hollywood movies, they state a different location to the one that the movie was filmed in.

### **4.3 Travel Intention**

Once destination awareness is achieved, the destination must work on transforming that awareness into travel intention. For some, traveling to the movie destination to

experience the scenery and the nature from a movie is enough. For many, however, it takes more than just seeing a beautiful location. One of the most mentioned ways to turn awareness into travel intention is creating film experiences at the movie destination. This can take place in different forms. As one of the interviewees mentioned there is on- and off-location tourism. On-location tourism is visiting the actual location depicted in the movie. Off-location tourism is visit locations which are not viewed in a movie but are associated with a movie such as movie studios.

A couple of the interviewees mentioned the movie Narnia: Prince Caspian which was filmed in the Soča Valley. They mention that during the production of the movie they built certain bridges over the Soča river which were later taken down and brought to their studio in Czech Republic. They add, however, that if those bridges stayed there, they would be a great attraction for film tourists who have watched the movie and want to experience a scene from the movie in real life.

Again, just like with destination awareness, the success of a movie can have a major effect on travel intention. As already mentioned above, the success of the Korean telenovela which features Soča Valley attracted a large number of Korean tourists to Slovenia, making them one of the top three tourists visiting it the year after the release of the movie. The success of a movie could also encourage the destination to create movie related experiences in order to attract as many tourists as possible.

#### **4.4 Marketing Campaigns**

Marketing plays a large role, both in pre- as well as post-production of a movie. Before a movie is being shot it is important to market Slovenia as a good movie destination for producers and after the production, the destination must work on attracting film tourists.

Regarding marketing of a destination to producers and directors the Slovenian Touristic Organisation in collaboration with Slovenia Film Centre have very different opinions and strategies compared to local touristic organisations such as the Soča Valley Tourist Board and VisitLjubljana. In 2017 the Slovenia Touristic Organisation and the Slovenian Film Centre partnered together to start promoting Slovenia as a film destination. They started offering a 25% cash rebate on project costs incurred in

Slovenia in order to attract bigger production companies. In addition, they started presenting Slovenia at the biggest film festivals like Cannes, Berlinale as well as FOCUS in London where they use the national and tourist label “I feel Slovenia” on all publications which are the most important promotional tools at such film fairs. In addition, they have created a thematic brochure which is indented to promote Slovenia as a film destination. The brochure promotes Slovenia as a green filming destination where its slogan is “Drive Less. Film Green. Film in Slovenia”. Furthermore, the Slovenian Film Centre is part of the European Film Commission which gives Slovenia additional visibility and networking. Both interviewees from Slovenian Touristic Organisation mentioned that they will continue promoting Slovenia as an excellent film destination.

The Soča Valley Tourist Board and VisitLjubljana, however, stated that they do not do any marketing when it comes to attracting film producers to their areas. The interviewee from VisitLjubljana mentioned that they attended the Cannes film festival once with the Slovenian Touristic Organisation. However, currently neither VisitLjubljana nor Soča Valley market themselves as a movie destination and it is also not part of their near future strategy.

Regarding post-production marketing campaigns to attract tourists, there are no strategies from anyone. A couple of the interviewees mentioned that using word of mouth from satisfied production companies, brings in more and bigger production companies in the future. However, nobody has strategies to attract tourists to the movie destination. In Soča Valley they made an attempt in creating a thematic trail in connection with the movie Narnia, so that tourists can visit locations where Narnia was filmed. This was, however, never widely marketed because post-production destinations face many restrictions regarding marketing the movie in their destination. Multiple interviewees mentioned that there are copyright restriction on the use of a movies marketing materials. In the case of Narnia for example, the destination was allowed to promote the movie only during the time that the movie was in the theatres. Since Narnian is a sequence of movies, once a new sequel came out, the previous movies could not be used as marketing material anymore. In addition, Soča Valley could not use any of their photo or video material for their promotion. This is the case with most Hollywood movies, either the name of the movie

cannot be used or the movie itself cannot be used as a destinations promotional campaign.

#### **4.5 Effects on Slovenia**

This section will discuss the effects which Slovenia has already experienced from the foreign movie industry and effects which could occur in certain circumstances. The interviewees mentioned many different types of effects on the country such as economic impacts, environmental impacts, social impacts, promotional impacts as well as impacts on the tourist industry whether those be positive or negative, or short- and long-term. As already mentioned in some parts above, interviewees were very divided in their opinions regarding the effects on Slovenia.

The most discussed impacts which most of the interviewees mentioned or agreed on were economic and touristic effects on Slovenia during the stay of the production companies. Since Slovenia is small, the filming crews and the production teams of big movies occupy entire cities, filling up accommodation, going to restaurants etc. This can be seen as a positive or negative impact depending on the season. If production companies want to film in high season, this can be viewed as a major disadvantage because the destination will be overpopulated, tourists won't be able to see the attractions they came to see resulting in nobody being happy. On the other hand, if movies are filmed in low season when there are no tourists and accommodations are not full, then movie production can solve the problem of seasonality. During the filming of Narnia for example, the filming crew occupied accommodations in the whole of Soča Valley. This had major positive economic impacts on Soča Valley because the movie was shot in low season when accommodations would normally be empty. Another positive example took place in winter of 2020, when the country was on lockdown due to the pandemic, however, accommodations in the Soča Valley were filled because the filming of an action movie was taking place.

Another major positive impact that foreign production companies bring to Slovenia is creating jobs. Even though production companies have their own filming crew, they also employ a lot of local workers from producers, catering companies, hotel services to make-up artists, translators, hairdressers, parquet makers, drivers, lighting technicians and local extras. After the introduction of the 25% cash rebate, the



number of filming days in Slovenia has increased and the field of production services has seen a yearly growth of around 100%. In addition, film production expands infrastructure, increases investment in individual film sectors and strengthens national visibility which can encourage viewers to visit.

The positive economic and touristic impacts that do occur, however, seem to only be short term. An example of that would be the already mentioned Korean telenovela. The Korean movie industry is considered to be the Hollywood of Asia, therefore they set the trends and have a huge market. However, as quickly as trends come, they also go. This was very obviously seen with the telenovela which was filmed in Soča Valley. The year after the release of the series, Koreans were in the top three tourists in Slovenia but this “hype” only lasted for one year.

Environmental impacts were also mentioned during some of the interviews. A positive environmental factor would be an increased awareness in ecology and the valorisation of the natural and cultural heritage. The interviewees did, however, also mention some negative environmental impacts which could occur such as environmental damage, more traffic as well noise pollution, fake explosions and fake avalanches which normally occur during the shooting of action movies and could harm the environment.

During two of the interviews social impacts were also discussed. In the filming location positive impacts such as an increase in residents’ pride and an increase in understanding what the local values are can occur. On the other hand, with a large increase in tourists or movies being filmed in high season the local communities can be disturbed causing unhappiness and a decrease in quality of life. In addition, if film tourism would cause many negative impact disagreements between the government, environmental activists, the local communities, and the filming studios can arise. Therefore, it is very necessary to have as much control over projects as possible. However, with film-induced tourism many aspects can often not be controlled.

Promotion is also an important impact that was mentioned and must be controlled in order to achieve positive outcomes. With the use of promotional materials Slovenia can create an attractive destination which will attract more tourists. It is, however, very important to control the promotional activities because overpromotion or the

wrong type of promotion could attract mass tourism which is not Slovenia's goal, as it does not have the capacity for mass tourism. In addition, mass tourism could cause some other already mentioned problems such as environmental damage and decreasing the quality of life of local communities.

The interviewees from Ljubljana and Soča Valley, however, mentioned that they did not pick up on any major impacts from Film-induced tourism. Even the smaller effects which did occur were short term, therefore film tourism is not part of their strategies as they believe there are many better tools to attract tourists, especially the type of tourists that each destination is targeting.

## **5 Discussion & Conclusion**

The purpose of this section is to discuss the results of the expert interviews and to relate them to existing literature. Firstly, the three main topics (destination awareness, travel intention and marketing campaigns) mentioned throughout the entire thesis will be discussed and compared to existing literature and later the research question which was stated in the introduction will be answered.

As already previously discussed destination awareness is the first step in creating film-induced tourism. Without destination awareness, film viewers do not know where the movie was filmed and therefore film-induced tourism may not occur. The most discussed aspect of destination awareness conducted in the nine expert interviews, was that the destination must be mentioned in the movie and must be part of the story line. This is strongly supported by Araújo Vila et al. (2021) who states that movies which put emphasis on the destination attract viewers to it. In addition, the interviewees discussed that negative awareness of the destination is very unlikely to occur because due to the cash rebate, movie scripts go through the Slovenia Film Center, which allows them to reject or change parts of the script which they think can be harmful to Slovenia. In case of negative awareness still occurring, it was stated that it would be a short-term negative effect. Hahm and Wang (2010) mention that the results of their study showed both positive as well as negative impacts on the perceived image of the destination. Therefore, Slovenian DMOs must not neglect the fact that negative awareness can occur. Depending on the perceived image of the

destination before the viewing of the movie, it can either positively or negatively affect the destination image after its viewing. De Lena (2014) mentioned that Slovenia is or was often perceived as a developing nation, therefore positive destination awareness can positively change the perceived image of the destination. This is also supported by Hudson et al., (2011) whose research suggests that a movie taking place in South American, which is often also considered as a developing nation, can positively change the perceived image of the destination.

The second step in making film-induced tourism possible is transforming the destination awareness into travel intention. During the interviews the most discusses way to do that is create film experiences. These can either include on- or off-location tourism such as creating movie maps, offering guided tours of filming location or studios as well as creating movie theme parks which was also mentioned by Hudson et al. (2006). In addition to film experiences, viewers must also resonate with the storyline. Araújo Vila et al. (2021) discuss the two most influential push factors being (1) comparing mental images with the reality of the destination and (2) having first-hand experience in a location where the cast of a movie has been and where the movie was filmed.

Throughout this research it has also become obvious that there are two major types of marketing which need to be conducted in film-induced tourism. These include pre-production marketing which involves marketing a destination to film producers and post-production marketing which is creating marketing campaigns to attract movie tourists to the destination. During pre-production stages Slovenia has done a lot in order to spread the word about becoming a filming destination. They have introduced the 25% tax rebate in 2017 and yearly travel to the most famous film festival to marketing Slovenia as an ideal filming destination. They market themselves as a green filming destination, as Slovenia offers four different macro regions within the span of a two-hour drive. Hudson et al. (2006) as well as Li et al. (2017) both suggest that DMOs need to get involved in the pre-production stage by marketing the destination and its advantages as well as offering cash or tax rebates. This is exactly what Slovenia does and has since seen a yearly growth in filming days as well as bigger and well-known productions coming to film in Slovenia.

For the post-production stage, however, the literature and the expert interviews do not align at all. All the experts which have had direct experiences with movie production at their destinations mention that there is an enormous amount of limitations when it comes to creating marketing campaigns in regards to movies. In cases of big productions such as Hollywood production, DMOs have copy right restrictions. They cannot use photo or video material for their movie campaigns, often they cannot mention the name of the movie before its release and even after. In cases where marketing campaigns are allowed, they usually have time restrictions on them, not allowing DMOs to have any freedom in creating marketing campaigns and experiences for film tourists. These types of restrictions were not mentioned in any of the literature. Hudson et al. (2006) mentioned that during the production of a movie, DMOs have many opportunities to create publicity for the destination, however, in the expert interviews it was mentioned that either they cannot mention the name of the movie because it is a secret until its release or in some cases not even the DMOs know what movie is being filmed.

The purpose of this research was to help Slovenian DMOs understand whether film-induced tourism has positive effects on the tourism industry and whether they should invest their time, money and energy into becoming a film destination. The question which now needs to be answered is: **To what extent can film-induced tourism positively affect Slovenian Tourism.**

In conclusion, it can be stated that film-induced tourism cannot bring long-term affects to Slovenian tourism. Evidence shows that due to many restrictions, DMOs cannot market their destination to its fullest abilities. In cases where marketing was allowed, or destination awareness did translate into tourism visitations (such as the case of the Korean telenovela) the tourist effects were only short term. The most positive effects only occur during the filming of a movie. These include economic effects such as employment of local crew and tourist industry effects such as full accommodations and consumption by the filming crew.

During the interviews it is also often mentioned that in order for long-term successful film-induced tourism to occur many factors need accumulate. Some of these factors include the success of the movie, the destination being part of the storyline as well as marketing campaigns being allowed. These can, however, not be controlled by DMOs.

Therefore, it is safe to say that DMOs should not be putting their main focus on becoming a film destination because there is no long-term effects on tourism and because film-induced tourism cannot be controlled by DMOs.

## 6 Limitations and Future Research

This section will discuss the limitations which this research incurred and suggestions for any future research conducted in the topic of film-induced tourism.

This research incurred a couple of limitations which are worth mentioning. Firstly, only nine interviews were conducted when the bare minimum was supposed to be ten. This occurred because the researcher faced some difficulties with reaching out to experts resulting in running out of time towards the end of the research. An interview which would have added great insight to this research would be a Slovenian production company which directly worked with a Hollywood film. This would possibly help to understand why they are so secretive with filming locations and why there are so many restrictions regarding the marketing of their movies.

Another limitation with this research is that multiple people from the same company were interviewed. There were three interviewees from the Soča Valley Tourist Board and two interviewees from the Slovenian Touristic Organization. This is a potential limitation because they have similar information to offer, however, each interviewee still expressed their own opinion which differed the interviews from each other. The third and final limitation of the research was that not all interviews were conducted over Zoom/MS Teams. Some of them were answered via email which made some replies shorter.

Some recommendations for future research on this topic include creating survey-based research on film-induced tourists in Slovenia in relation to one specific movie filmed. Since this is qualitative research, the researcher was trying to get a general understanding of the effects of film-induced tourism in Slovenia. However, the survey would give a general understanding of the tourist's perspective of film-induced tourism and not just the experts perspective.

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## Appendices

### Appendix 1

#### Interview 1: Soča Valley Tourist Board

**1. How has film-induced tourism affected Slovenia?**

**(1) Which movies were filmed in Slovenia already and in which locations?**

I can answer for the case of the Soča Valley, unfortunately I do not have an overview for the whole of Slovenia. The most famous film from the Soča Valley are Stories from Narnia. In 2019, the series Kolo vremena was filmed. The documentary MISSION MT MANGART. is well known. Commercials are often also filmed in the Soča Valley.

**(2) Did they influence tourism? Positively? Negatively?**

There was no major rush due to filming, but this certainly contributed to the visibility of the valley. Tourist providers are usually satisfied with such recordings, as the recordings are out of season and contribute to the occupancy of the valley.

**2. How much have you marketed Slovenia as a movie destination in the past and how?**

**(1) Have you done any marketing in regard to being a movie destination?**

Various posts were published on social networks, in the news of the destination. A thematic trail was made in connection with Narnia.

**(2) What did the marketing look like?**

Social media posts, news, website, themed trail.

**(3) If not, is that something you are striving for?**

This method of promotion could be put to better use, but there are often copyrights and restrictions on the use of materials in the background.

**3. Do you think Slovenia should become a movie destination? Why/Why not?**

It can be one of the branches or methods of marketing, but it probably lacks at least some additional "film" offer for a film destination.

**(1) Do you think it should be marketed as a movie destination?**

It can be pointed out in the way of communication that Slovenia is attractive for the film industry, but I do not believe that this is why it is a film destination.

**4. How do you think Film induced tourism can affect awareness of Slovenia?**

To some extent yes, but not primarily.

**(1) Do you think becoming a movie destination will increase destination awareness? Why?**

To some extent, but there are many other areas for positioning Slovenia. There is currently a lack of "designed film tourism products" for the film destination

**5. What can you do to turn destination awareness into travel intention?**

**(1) How can you attract potential tourists after the viewing of a movie?**

Maybe with targeted marketing - anyone who has seen the movie can see ads for the destination.

By designing a film tourism product / experience.

**(2) How would you market the movie destination?**

Through the offer of a film experience - with an offer online, targeted ads.

**6. Is there a specific movie genre which you are targeting? Why?**

We do not have that in the strategy.

**(1) Will some genres bring more awareness than others?**

More important than genres are the sections - whether it shows unspoiled nature, mountains, views - for which visitors go to the Soča Valley.

**(2) Can some genres have a negative effect on the destination?**

Most probably not.

**7. What strategies do you use to attract movie directors to Slovenia?**

We do not have a specific strategy. We advertise the destination in general.

**(1) Why is Slovenia better than other locations?**

Natural beauties.

**8. How can film induced tourism positively affect Slovenia?**

Awareness.

**(1) What are the goals of becoming a movie destination?**

The Soča Valley does not have such goals defined in the strategy.

**9. How can film induced tourism negatively affect Slovenia?**

**(1) What are potential negative effects?**

Currently, no negative impacts are foreseen as long as the approach is sustainable and there is no one-day mass tourism.

**(2) What do you need to take care of in order to avoid negative effects?**

Design of suitable tourist products / experiences

**10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

One can explore the potential and find channels of communication along with some strategy of why and in what way we want to become a film destination.

**(1) Will the positive effects outweigh the negative?**

Yes, if we design the offer sustainably and with quality

**(2) Will destination awareness increase?**

Partly, yes.

**(3) Will tourism to movie destination increase?**

It can be partially increased

## **Appendix 2**

### **Interview 2: Nora Production**

**1. How has film-induced tourism affected Slovenia?**

A lot of international projects mainly let's say from commercial field like advertisements but we have also cooperated with several productions which are in the field of feature films or maybe TV dramas or Series. I can talk mostly about Korean market as we have done three different Korean TV series which were shot in Slovenia. I can say that from the first one that we did which was black knight, it was so popular in Korea. the Korean tourists next year were the second or the first in the number of tourists that visited Slovenia. The Korean market is like what they see on television they want to visit. This story was also promoting Slovenia because they wanted to include the places which are attractions in Slovenia. There was quite a huge impact on the tourism. In this Korean projects the next one was the called "memories of the Alhambra" which was shot in Spain, Slovenia, Hungary and in Korea and it also had the same influence on tourism when it came out.

From TV advertisement this impact is much smaller. The people that are watching them, don't know where they are shot.

**2. How much have you marketed Slovenia as a movie destination in the past and how?**

Well there are two ways one is official way which is through the Slovenian film center. They have a kind of marketing plan to promote Slovenia's destination on festivals. There is also a film Commission in Slovenia which is not as big as in other countries but there is one person who is dealing with that and promoting Slovenia as destination. In Slovenia we are working now for I think 15 years in the field of production service which means that projects are executed production wise in Slovenia and this production service was mostly done on TV advertising field and now it is starting to go into the field of feature films. So when foreign companies that work here speak about Slovenia and the destination, word of mouth is going around and bigger projects come.

We as a company are communicating through newsletters and we attend many events like film festivals or some events for film makers which are international, and we invite producers to come and experience Slovenia. I would say that we were targeting Europe but in the last 10 years we're also targeting the whole world because it is one big production space and it doesn't matter where the productions comes from because the travel expenses to visit us is the same as anywhere else.

**3. Do you think Slovenia should become a movie destination? Why/Why not?**

Recently, I think in 2018 Slovenian film center launched cash rebate which means that Slovenia returns some percentage of the money that is spent in Slovenia back to the to the production that is working here. We launched a 25% cash rebate. And this is a tool that attracts bigger project this doesn't go to TV advertising but only to films, documentaries and TV series. The tool was, I would say, launched too late (because

other countries launched it way before us )but still it is available now. Because of this tool we are now also getting Hollywood movies that are executed in Slovenia and other movies from other countries like European countries like Korea in our case. I would say that this field of production services of bigger projects like films is growing every year by I don't know 100% so it is becoming really big for us (not just our company but Slovenia)

But the other thing is that we as a market or let's say as a production service we are still much smaller than some other destinations (for example in Czech, they have a really big production company with a lot of people working ,a lot of effects. They have built some cities from 17th century 18th century or whatever and we don't have these). Let's say the most attractive things (about Slovenia) is our nature, the European historic architecture and I would say very short distances between destinations. This is the biggest advantage we have. The city, mountain and the coast within one hour drive, this is possible probably only in Slovenia.

#### **4. How do you think Film induced tourism can affect awareness of Slovenia?**

It can affect its awareness. For example it is best when something is built for the execution of some production, if it stays like in the area where it was built. For example I think that stories of Narnia were shot maybe in 2010, a Hollywood movie which was shot in the area of Bovec. For the movie they have built a big wooden bridge which is destroyed in the movie. But it would be a good idea if it was still existing so that people could visit this place and see where it will shot and you know they a movie experience in real life. So I think that Slovenian tourism don't exactly know what they can get from film tourism/film industry. But I think in the near future they will get this knowledge.

There is already film tourism in the world. For Example when you go to Thailand, you can visit a bay where Leonardo DiCaprio shot his famous movie. Same could happen for Slovenia. Same idea in Dubrovnik, where game of thrones was shot. For sure many people visit Dubrovnik just because of that.

#### **5. What can you do to turn destination awareness into travel intention?**

It doesn't happen over night. If a Hollywood movie shot here which would be a big success it can be an instant attraction that would transfer into tourism. It depends from project to project from. Year to year. Slovenia should be aware of what has been done in our country.

STO doesn't know for all the projects shot here and they don't know how to take advantage of it. I think it should be used in the tourism field. For example, make a movie promotion for a destination for some movie. But if a big production shot a scene in Slovenia, it would be much better visually. Of course, you can't take this content and use it in a tourist promotion but still it can be a good reference for the tourism.

**6. Is there a specific movie genre which you are targeting? Why?**

If we shoot something for the movies, we are not shooting the whole movie. We are shooting only part of a movie, maybe three minutes. The last project shot in Krvavec, for Hollywood, something with Naomi Watts, they shot for 40 days and was used only for 4 minutes of the movie. In Slovenia, we finish a whole movie in 40 days. In Slovenia it is mostly 25-30 days for domestic movies. Normally, there are some locations which are special here (Soca river, lakes, something specific) it doesn't have to be the whole movie.

Not targeting any specific genre. It can be, a thriller, comedy, drama, love story, action movie (we have very good team that deals with visual and special effects). We did something like. Batman (people flying through air). Everything is possible. There is no limitation of genre.

**(1) Will some genres bring more awareness than others?**

Yes of course. Probably comedies, action movies, maybe some thrillers.

In Europe we are shooting mostly European films which are more drama, not so commercial, I would say. If you have a commercial background of a movie, that needs

to succeed on Netflix or cinemas, these genres bring more attention. I mentioned stories of Narnia which were shot many years ago, some series. I also heard that Tom Cruise shot here last year somewhere

**(2) Can some genres have a negative effect on the destination?**

Yes, but not genre but a story, if the story talks bad about Slovenia as destination or our area or people that live here. But I would say its very unlikely to happen, Slovenia is usually not mentioned if this happened. In those cases even if some shots were done in Slovenia, they represent another destination, maybe imaginary, so they don't know it is Slovenia. Because we give cash rebate, the scripts also go through Slovenia film centre, so if they included something that wouldn't be good for Slovenia, they wouldn't get a cash rebate. I'm not afraid that something bad can come out of it.

**7. What strategies do you use to attract movie directors to Slovenia?**

Movie directions are not the main decision makers at the first stage. The first step is targeting productions. Productions which have a project, they are looking for possibilities all over the world. For example, we were pitching for a Netflix Canadian project. They were looking for a general location for their movie and they were contacting 14 different countries. We were one of the fourteen but we didn't get it because it is the whole world competing. The first thing is the right location (best location possible) and the second thing is money wise, if the production in our country is competitive to other locations. If yes, then the chances are high to move forward. And then, the directors team comes in and decides what they like. So we are not targeting directors but the production companies.

When it comes to tourism, what we do is promote the coast, mountains, lakes, cities. But in terms of movies it's a different story because we can promote all of the above but in the script there is a location which is exactly described. So we cannot know if Slovenia has what the production is looking for. If we do have it, then we are close to getting the project.

**8. How can film induced tourism positively affect Slovenia?**



IN many ways, one is of course tourism. People coming to Slovenia because they saw something they liked in the movie. It is obviously much easier if they know that Slovenia is presented in the movie.

Besides tourism, there are also other advantages of production services in Slovenia. When we get this kind of project, around 100 Slovenian people that work in this industry get a job. Also, a lot of accommodations in are used such as restaurants, bars. A lot of good effects come out of this industry. It is a multiplication factor. If they spend 1 euro, our state gets back 2.5 euros. This industry has a big multiplication effect on every spent euro.

#### **9. How can film induced tourism negatively affect Slovenia?**

There are some minor things which can negatively affect Slovenia. When destination in Slovenia is unknown, or if there is not a lot of work in this production field then all the locations for hiring are cheap. If they rent some location for the first time, it can be cheap. For example renting the opera house in Ljubljana costs about 10 000 euros per day because it has a lot of demand for filming, so the price goes up. This is one negative factor but the money still stays in Slovenia.

Another one is that we shoot a lot as an industry on the mountain road Mangart, which goes up from Bovec. When the production is happening, the street needs to fully close which means that on those days no tourists can go to Mangart mountain. Many times people that come to Bovec, are disappointed because if some filming is happening, they cant see these attractions. Same goes for other locations like Bled castle. When shootings are happening, these locations are closed which is a minor negative impact. Nobody can access them.

But normally I would say, in terms of bad influence about the Slovenian name as a country or as a brand, usually there are not really bad impacts, mainly good ones.

**10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

Yes and we are focusing a lot. In Ex Yugoslavia a lot of very well-known Hollywood and western movies were shot with very big Hollywood stars in area of Velebid. There were fights between Cowboys and Indians. 40-50 years ago this field was already explored and then there was a gap till 2005. Then we started with tv ads for foreign countries. From 2015 we started with movies and series.

Every project executed in Slovenia brings (usually) positive experience to people who film here, and they very much like to return. Also, they give positive recommendations to other productions in their countries. Every year more and more productions are coming to work in Slovenia. I can also say for the cash rebate. When it was launched, 1 000 000 was available for projects to refund from state of Slovenia and it was not spent in the first years. Now 1000000 is not enough, not we need 1,2,3 million., If big Hollywood movie comes to Slovenia, then they can spend 10, 20,30 million for just one movie. This cash rebate is then already too small. (Czech republic gives back to producers 20 – 30 million per year)

There is still a lot of potential for improvement, for bigger projects to come to Slovenia. This is also because 10 or 15 years ago, people working in this industry didn't have so much experience. Now every field (set design, visual effects, food styling, make up) has a lot of people working and a big reference list. That's why people are coming to shoot here, because we have very good teams. These teams can also export their knowledge to other countries and they also work in other countries. Before we needed to rent people from Germany and other countries because we didn't have this knowledge here. I think that this industry has a big future, you wouldn't imagine how many people are working in this field. We represent (I think) 1.5% or between 1 and 2 % of whole Slovenian export is only film industry. If you will ask anyone on the street they wouldn't believe this. They think that only big companies are exporting.

### **Appendix 3**

#### **Interview 3: BAS Production**

**1. How has film-induced tourism affected Slovenia?**

If we are talking about foreign productions coming to shoot commercials, very positive. Also I think that the feature films which were shot by BAS production in Slovenia (not all films filmed here), also very good because there is a lot of money coming in the state, also the hotels that are needed for the production team and the employment of the local crew.

**2. How much have you marketed Slovenia as a movie destination in the past and how?**

**3.**

I don't have those numbers. I can't tell.

**4. Do you think Slovenia should become a movie destination? Why/Why not?**

Yes it should because of the nature and the professionalism from the Slovenian crew side. We have a really good crew which can be a really good support to foreign production.

**5. How do you think film-induced tourism can affect awareness of Slovenia?**

I hope it can. Everything depends on the culture of the ministry and the culture of the economy because they need to be aware that if they will give us some tax rebate that more and more foreign production will come into Slovenia, making movies.

There is already a lot of commercials from abroad but I think this tax rebate can encourage also the movie industry and movie production to come.

**6. Is there a specific movie genre which you are targeting? Why?**

No, doesn't matter. It's really not that important.

**7. What strategies do you use to attract movie directors to Slovenia?**

This is something that the ministry of culture should do in for example Cannes or Berlinale etc. but more or less we as production companies in our own way try to be attractive to foreign productions.

**8. How can film induced tourism positively affect Slovenia?**

With more money coming to Slovenia. Everything, a lot of accommodations like hotels and apartments. Also, local crew. In the future the film industry should be a good commercial for Slovenia to be well known in the world.

**9. How can film induced tourism negatively affect Slovenia?**

I don't see it.

**10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

Slovenia has all the resources to become a good movie destination. We just need to market to foreign productions that we have a cash rebate because for productions the first thing they care about is money. If we give them back something, they're more interested. If we want to become a good movie destination we also need more studios but that's something that also the state should see and invest in.

## **Appendix 4**

### **Interview 4: Soča Valley Tourist Board**

**1. How has film-induced tourism affected Slovenia?**

Slovenia is a very beautiful country, that's why lots of media and production companies choose it to film on different locations. I can comment on movies that were shot in the Soca Valley. The most iconic for Slovenians is Srecno Kekec, an old movie shot in 1963 and was shot mostly in upper Soca valley. Then, more recent movies, maybe the most known, shot in the Soca valley was the chronicles of Narnia, Prince Caspian in 2008. It was quite a long shoot. The crew occupied the whole valley and its about 10 minutes of movie material. Then another movie is triage released in 2009. the main actor is Colin Farrell. Another Slovenian production "gremo mi po svoje" which was also shot in upper Soca valley released in 2010. And recently also in 2021, one part of tv series "the wheels of time" was also shot in Soca valley. Quiet a lot of movies, maybe I forgot some of them. Besides the movie industry there is also a lot of production for different commercials.

**(1) Did they influence tourism? Positively? Negatively?**

Well the commercials, I don't believe so because they are short sections and you really have to know the location to know where it was shot. Otherwise for the movies, maybe the movie that affected tourism the most was the chronicles of Narnia, Prince Caspian.

**2. How much have you marketed Slovenia as a movie destination in the past and how?**

We didn't directly market it because it is hard to do it. When the movies and commercials are shot it is a secret until its released, so its tricky work.

**3. Do you think Slovenia should become a movie destination? Why/Why not?**

Well it can be a movie destination because of its beautiful scenery, landscape and all the sights and natural wonder and its very green and appealing destination for movies.

**4. How do you think Film induced tourism can affect awareness of Slovenia?**

As I said its hard to increase awareness because a movie is produced in several locations, so you don't know where the location is unless you read at the end of the movie. But yea, with promotion after the movie. But that's also tricky because of the copy rights of the movies.

**5. What can you do to turn destination awareness into travel intention?**

Promote yourself as the destination here this and this movie was shot, but as I mentioned one of the tricks is copy rights. For example, in 2008 when prince Caspian was released, if I remembered correctly, it was possible to promote that movie just in the period when the movie was in theatres. As soon as the sequence movie was released it wasn't allowed to promote the old movie but only the new release. Its all connected with copy rights.

**6. Is there a specific movie genre which you are targeting? Why?**

Its hard to target any genre but regarding the landscape. Its hard to say. Some movies like triage was shot in big gorge of Soca river but it was just a short clip and its even hard to say where exactly this is unless you really know that this is Soca river.

**(1) Will some genres bring more awareness than others?**

Its hard to say. For example the chronicles of Narnia, its like a fairy tale land. It can be directly connected with Soca valley which is as beautiful as in a fairy tale. This kind of movies would be good to be shot in Soca valley. On the other hand if you associate the destination with a dark place or a scary movie or something like this. I think that the location itself loses the appeal. You connect the location with the negative site.

**7. What strategies do you use to attract movie directors to Slovenia?**

I don't want to be cocky but we don't have any strategy because the producers come on their own. I think that the director of chronicles of Narnia (I hope the story is correct but) he was passing through Slovenia and he fell in love with the destination that's why he chose Soca valley as a location for shooting. Also production houses for commercials, they already know the destination because so many commercials were already shot here so they know where they can shoot for example a curvy road, mountain road or nature or beautiful river or scene next to beautiful river. I think the word is already spread, so we don't have to put so much effort in.

**(1) Why is Slovenia better than other locations?**

Because of its unique nature. Its also a small country so you have lots of natural wonders, lots of points which are not far away from each other. Sometimes I compare Slovenia to New Zealand, but new Zealand to travel from one side to the other you have to travel many kms and here in Slovenia you have everything at your reach. From mountains to coast you have 2 hour drive. Or from coast to hill area on other side of Slovenia you also have 2 hour drive. So you have a little bit of everything: we have mountains, the coast, hill areas, brda region which is called the Slovenian Tuscany, the karstic region with lots of caves so Slovenia has a lot to offer and a lot of material can be shot in Slovenia. Especially the Soca valley is known for its beautiful Soca river with its emerald colour.

#### **8. How can film induced tourism positively affect Slovenia?**

It can boost the awareness of the location if the movie is shot in a way that you can know where it is. Of course bring movie tourism to the location. Of course everyone knows the lord of the rings which boosted awareness and tourism to its destination.

#### **9. How can film induced tourism negatively affect Slovenia?**

It depends when the movie is shot. For example the Soca valley has very strong summer tourism, so July and August is the peak of the season. If the movie is shot at that time of the year, it's already pretty busy so with all the crew. (Walt Disney crew for Narnia was very big and all the capacities at accommodations were filled through the whole valley by the crew so there was no space for tourists at that time) this can be a negative side. Otherwise it didn't directly affect the location because where the movie was shot they had to put everything back to its original state. As I said if the location is linked to a negative side, it can affect also the destination awareness negatively. Instead of visiting this place, they will go somewhere else because they think it's a bad destination or something like that.

#### **10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

Just to be a movie destination, I don't think so because Slovenia has a lot to offer. It's a small country so I believe that if 1 big movie is shot in one destination by one production house, the other production houses will tend to avoid it because they don't want to copy it. It's a tricky thing. But yes the nature is beautiful, the sights are beautiful and the destination is small and it has a lot to offer.

### **Appendix 5**

#### **Interview 5: Slovenian Film Center**

##### **1. How has film-induced tourism affected Slovenia?**

Slovenia has several attractive destinations in this respect. In the former Yugoslavia, the most films made in Slovenia were shot in the coastal town of Piran and in the valley of the Soča river. Several foreign films were also shot in Slovenia in the last ten years, the largest of which in terms of budget was The Chronicles of Narnia: Prince Caspian in 2008.

Most of the film was shot around the Soča, as the producers were looking for natural wonders. The reason was that it resembled New Zealand, where previous Narnia movies were filmed. Apart from movies, Slovenia is also popular for shooting commercials.

Most enchanting are still the Logar Valley, Piran, Lake Bled and the Predjama Castle. Unique locations, that can't be found anywhere else in the world, like for example the Postojna Cave or Velika Planina, are also very attractive. Very often film makers also search for substitute locations similar to other locations in other countries or regions – such examples are the Alps or urban Ljubljana.

Last year (2021) on Krvavec the entire film Infinite Storm, starring Naomi Watts, was shoot. The film was directed by renowned Polish director Malgorzata Szumowska.

It should be emphasized that Slovenia is very attractive for filmmaking precisely because of its natural beauty and quick access to locations. In one day, film crews can move from the Karst to Gorenjska, Primorska, etc.

After filming The Chronicles of Narnia: Prince Caspian the Soča valley was one of the more recognizable touristic spots in Slovenia. For sure Krvavec and other regions will have the same recognition. The conclusion is that film industry has definitely a positive effect on tourism.

## **2. How much have you marketed Slovenia as a movie destination in the past and how?**

We have marked Slovenia quite successfully as a movie destination, but there is still a lot to do.

The Slovenian Film Center, and thus the Film Commission, is part of the international network of the European Film Commission (EUFCN): <https://eufcn.com/>, which gives us additional visibility and networking but this is just a springboard which needs to be greatly upgraded in the future. We also promote domestic film locations at all major international festivals such as the Berlinale and the Cannes. In recent years we have also presented ourselves at a specially specialized fair in London: Focus London.



Please see: <https://www.film-center.si/en/news/7849/slovenias-successful-presentation-at-the-film-location-market-in-london/>

### **3. Do you think Slovenia should become a movie destination? Why/Why not?**

Slovenia has all the qualities to become a movie destination.

It is a land of four distinct macro regions: the Alpine, Mediterranean and Karst, Thermal Pannonian, and Central Slovenian region with the capital city of Ljubljana, all of which can provide distinct and unique film settings. As a filming destination, Slovenia has many advantages. Most importantly, even the most distant film locations in Slovenia are not more than two hours from Ljubljana, the technical center, by car. It is also possible to shoot at various locations during the same day, as one can be surrounded by the rolling hills of Pomurje in the morning, while enjoying the sea or looking down from an Alpine summit in the afternoon. Slovenia boasts two climate zones as well: the continental and the coastal. This is extremely convenient for filming, especially during the winter.

The Slovenian film industry can provide the logistical and technical support for international film producers as well as offer a wide range of filmmakers, film experts, artisans, and assistants, all of them experienced in the film arts and film production, mobile, and used to international cooperation.

Aside from the breathtaking natural features and lovely cities with remarkable architecture, highly experienced professionals in various fields of film industry are working in Slovenian film industry. Moreover, financial incentives are available for all kinds of visual productions. In year 2017, the film industry public funding introduced a 25 % cash rebate (<https://www.film-center.si/en/>).

In short: Slovenia provides unique filming locations and all the logistic and technical support that goes with it!

#### **4. How do you think Film induced tourism can affect awareness of Slovenia?**

Film-induced tourism is still a very new niche of tourism but there are many benefits of film-induced tourism.

The presence of foreign film production companies has long-term positive effects on the economy for each country, especially on cultural and film tourism. Film production creates new jobs within the film industry, expands infrastructure, increases investment in individual film sectors, strengthens national visibility and location / film tourism - all of which have great cultural and economic value for the country. Foreign production companies on local soil hire local producers, local catering, and hotel services, employ, and hire a full range of filmmakers and creators from make-up artists, translators, hairdressers, parquet makers, drivers, lighting technicians to local extras, etc., which reduces in the long run unemployment in different sectors of the country. Based on a story shown in a certain film or TV series shot in Slovenia, the country's marketing presence on international markets is increasing. The ideal result of film tourism and the presence of foreign film producers are investments in new film studios and employment of the people who work in them.

Direct impacts refer to the financial impacts which are caused by the spending of the film producers in the local community, as for example the payment for different services, permissions, rental equipment or payment for food and accommodation. While the indirect impacts can be understood as the promotional impacts, which due to the creation of a community as an attractive destination result in attracting even more tourists than before.

#### **5. What can you do to turn destination awareness into travel intention?**

Destinations lets people experience and imagine how their favorite movie, TV-show or Netflix series would be in real life by traveling to the actual filming location site. People, who will see for example the movie Infinite Storm, will definitely like to see the spots from the movie, which were shot in Krvavec.

You can have different form of film tourism, for example on- and off-location tourism. Film tourism is usually differentiated between on-location tourism and off-location tourism.

On-location tourism can be briefly defined as the visiting of an actual filming location. Sometimes the primary motivation to travel is solely to visit the filming location and other times it might just be an activity you include in your trip or holiday – these can as well be some strategical parts to promote some of the filming locations and destinations.

Off-location tourism by our knowledge refers to the visitation of locations which are not filming locations but associated with the film. For example movie studios (in our case Studio Viba in Ljubljana).

Please contact Slovenian Tourist Board <https://www.slovenia.info/en/business/about-slovenian-tourist-board> and Ljubljana Tourism <https://www.visitljubljana.com/en/about-us/> for that matter as well.

**6. Is there a specific movie genre which you are targeting? Why?**

There is no specific movie genre, that we would be targeting, also, we do not think that some genres could negatively affect Slovenian film locations/destinations.

**7. What strategies do you use to attract movie directors to Slovenia?**

We are promoting Slovenia as a green country – our slogan is Drive less. Film Green. Film in Slovenia, please see the website: <https://filminslovenia.si/index.html>, where you will see all the benefits, why film in Slovenia.

**8. How can film induced tourism positively affect Slovenia?**

The positive impacts of film tourism can currently clearly be divided into three main categories: raising the awareness of tourists; increased destination interest and contribution to tourism growth. The main benefits which tend to arise from film-induced tourism will most likely be economic ones - employment, and revenues can be expected. It is of importance to remember that all of economic impacts can be

generated by film producers as well as film tourists. The impacts generated by the film producers are usually always short term while the film tourists' impacts are long term.

The positive environmental impacts include the rise of the ecological awareness and the

valorization of the natural and cultural heritage, while the social positive impacts consist of the increase in the residents' pride; the increase in understanding what the local values really are and the destination (re)branding through the film producers. One of the main reasons why film-tourism has such an extensive impact on the economy is that

it attracts tourists all year long regardless of the weather conditions and therefore reducing the problems of seasonality.

#### **9. How can film induced tourism negatively affect Slovenia?**

Potential negative effects could be:

- the cultural and environmental damage, such as the damages made to cultural and natural resources or loss of cultural values and identity,
- community disturbance impacts, and the last major cost and challenge of film induced tourism is the disruption of longer-term tourism products, markets, and resident wellbeing,
- the roads tilting due to the number of cars driving over them,
- not enough parking and more traffic,
- overpromotion of the destination through the film and the commoditization of the site or the culture through the film.

Nevertheless, this will never be a task of ease as film tourism can happen accidentally and incidentally and disagreements between the government, environment activists, the community and film studios arise.

**10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

Yes, we do think that Slovenia can and should become a movie destination, with the awareness of all positive and negative impacts, that this shell bring.

Forms and Characteristics of Film-induced Tourism Form Characteristics that Slovenia could focus on.

1. Film-induced tourism as part of a main holiday - Tourists will visit film location or book a film tour for a holiday without any previous destination knowledge.
2. Film-induced tourism as a main purpose out of special interest - The booking of a holiday to a destination because of its profiles on the screen.
3. Film-induced tourism icons as focal points of visit - Natural beauty, historical places, actors can serve as icons.
4. Film-induced tourism to places where filming is only believed to have taken place - Tourists visit the filming places even if the film represents a different setting.
5. Film-induced tourism as part of romantic gaze - Tourists like to gaze on places reinforced by the films in solitude, establishing a semi-spiritual relationship with the place.
6. Film-induced tourism for reasons of escape - Visiting film locations elevates tourists beyond the mundane reality of everyday life.

Source: Adapted from Busby & Klug (2001)

## **Appendix 6**

### **Interview 6: Slovenian Touristic Organization**

#### **2. How much have you marketed Slovenia as a movie destination in the past and how?**

The Slovenian Tourist Board (STO) carries out activities in the field of promoting Slovenia as an attractive film destination. Films, advertisements and videos can make an important contribution to increasing the visibility of Slovenia and its natural beauties, which can encourage viewers to visit our country. Shooting commercials and movies also affects overnight stays and consumption at the shooting destination.

The STO works closely with the Slovenian Film Center to promote Slovenia as a film destination. We thus cooperated with the Film Center in the creation of a special thematic brochure, intended for the presentation of Slovenia as a film destination. We also agreed with the Film Center to implement the national and tourist label I feel Slovenia on all publications of the Slovenian Film Center, with publications being one of the most important promotional tools at specialized film fairs. Cannes, also as part of a press conference we are preparing together with the Film Center. In cooperation with the STO, the Film Center of Slovenia presented itself as an attractive film destination in London at the internationally recognized fair for the promotion of FOCUS film locations.

In March 2018, the STO also conducted a special workshop with representatives of tourist destinations on the topic of film tourism and the promotion of Slovenian film locations in connection with tourism. At the workshop, participants learned about the benefits and opportunities offered by the film industry for tourism development, presented practical advice on how to best use the potential of filmmaking and how to effectively support the arrival of film crews in destinations.

#### **4. How do you think Film induced tourism can affect awareness of Slovenia?**

Slovenia, as an excellent destination for filming TV movies of various genres, TV commercials or ads that are shown on social networks, is discovered by many

production companies and we are glad that one of the largest and most recognizable online retailers in the world, Amazon, decided last year to shooting a Christmas ad in Slovenia, more precisely in Ljubljana.

### **7. What strategies do you use to attract movie directors to Slovenia?**

The decision of film producers to choose our country as a film location is also positively influenced by the fact that since autumn 2017 the Republic of Slovenia allows foreign film producers shooting films in Slovenia up to 25% reimbursement of all project costs incurred in Slovenia. This right to a cash refund has had a positive effect on the growth of the number of filming days in Slovenia and brings positive economic, financial and promotional effects in the long run and strengthens Slovenia's visibility as a tourist destination in the long run.

### **10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

At the STO, we will continue to participate in the presentation of Slovenia as an excellent film destination, as we are aware of the influence of the film industry on a global scale, when Slovenia's appearance as a film backdrop has a positive impact on promoting Slovenia as a tourist destination.

## **Appendix 7**

### **Interview 7: Visit Ljubljana**

#### **1. How has film-induced tourism affected Slovenia?**

##### **(1) Which movies were filmed in Slovenia already and in which locations?**

We do not have a list of films or commercials shot in Ljubljana.

##### **(2) Did they influence tourism? Positively? Negatively?**

We did not pick up on any impact of films of commercials shot in Ljubljana apart from the occasional closures of parts of the city that tourist frequent (such as Ljubljana Old Town).

#### **2. How much have you marketed Slovenia as a movie destination in the past and how?**

##### **(1) Have you done any marketing in regard to being a movie destination?**

A few years back we attended Cannes twice with the Slovenian film centre and Slovenian tourist board. We presented Ljubljana as a film destination.

**(2) What did the marketing look like?**

It was a presentation at an event.

**3. Do you think Slovenia should become a movie destination? Why/Why not?**

**(1) Do you think it should be marketed as a movie destination?**

Film tourism is not a part of our strategy 2022 – 2027. We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

**4. How do you think Film induced tourism can affect awareness of Slovenia?**

**(1) Do you think becoming a movie destination will increase destination awareness? Why?**

We have not identified marketing Ljubljana as a film destination as one of our priorities.

**5. What can you do to turn destination awareness into travel intention?**

**(1) How can you attract potential tourists after the viewing of a movie?**

**(2) How would you market the movie destination?**

We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

**6. Is there a specific movie genre which you are targeting? Why?**

**(1) Will some genres bring more awareness than others?**

We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

**(2) Can some genres have a negative effect on the destination?**

We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

**7. What strategies do you use to attract movie directors to Slovenia?**

**(1) Why is Slovenia better than other locations?**

We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

**8. In your opinion, do you think Slovenia should focus on becoming a movie destination?**



We have not identified marketing Ljubljana as a film destination as one of our priorities thus we do not have any action plans or projections available.

## **Appendix 8**

### **Interview 8: Slovenian Touristic Organization**

The Slovenian Tourist Board is aware that Slovenia is an attractive film destination and that the shooting of advertisements and films affects overnight stays as well as consumption in the filming destination. We thus cooperated with the Film Center in the creation of a special thematic brochure (available here), intended for the presentation of Slovenia as a film destination. We also agreed with the Film Center of Slovenia to implement the national and tourist label I feel Slovenia on all publications of the Slovenian Film Center, with publications being one of the most important promotional tools at specialized film fairs. Since 2017, together with the Slovenian Film Center, we have been presenting ourselves to filmmakers at the largest European film festival in Cannes, and in 2018 and 2019 we also participated in the internationally recognized fair for the promotion of film locations, FOCUS London.

In March 2018, the STO also conducted a special workshop with the Slovenian Film Center with representatives of tourist destinations on the topic of film tourism and the promotion of Slovenian film locations in connection with tourism. At the workshop, participants were introduced to the benefits and opportunities offered by the film industry for tourism development, presented practical advice on how to best use the potential of filmmaking and how to effectively support the arrival of film crews in destinations.

The decision of film producers to choose our country as a film location, in addition to idyllic and picturesque, which offers a variety of filming locations in Slovenia, is also positively influenced by the fact that since autumn 2017 the Republic of Slovenia allows foreign film producers filming in Slovenia up to 25 % of reimbursement of all project costs incurred on the territory of Slovenia, following the example of most European countries. This right to a cash refund has had a positive effect on the growth of the number of filming days in Slovenia and brings positive economic, financial and promotional effects in the long run and strengthens Slovenia's visibility as a tourist

destination in the long run. Among the key factors that place Slovenia among the exclusive film locations are well-preserved historical buildings, the abundance of picturesque locations in the immediate vicinity, and the fact that it can be filmed in one day in the mountains and by the sea. Slovenia also has two climate zones; continental and coastal, which are more than welcome for filming, especially in the winter season.

Slovenia, with its geostrategic position, boutique, exceptional natural and cultural diversity within the four regions, undoubtedly represents an extremely great potential for the arrival of world film teams. Four regions, Mediterranean & Karst Slovenia, Thermal Pannonian Slovenia, Ljubljana & Central Slovenia and Alpine Slovenia, offer a unique range of accessible, unique and inspiring film destinations. In addition to raising the profile of the destination contributed by the film industry, film tourism also encourages 'seasonalisation', as films can be shot in all four seasons, and Slovenia's geographical and climatic diversity is once again one of Slovenia's key strengths.

At the STO, we will continue to participate in the presentation of Slovenia as an excellent film destination, as we are aware of the influence of the film industry on a global scale, when Slovenia's appearance as a film backdrop has a positive impact on promoting Slovenia as a tourist destination. It can encourage viewers to visit it.

## **Appendix 9**

### **Interview 9: Soča Valley Tourist Board**

#### **1. How has film-induced tourism affected Slovenia?**

Depends but I don't think it's affected Slovenia significantly because we didn't have a national strategy in terms of promotion through the movie industry. There were some ad hoc attempts but personally I think that we did not invest enough resources and time or energy to go in that direction. Maybe it wasn't the focus to do that but the results are minimum when it comes to the movie industry.

**(1) Which movies were filmed in Slovenia already and in which locations?**

The thing about international movies if we are talking about the Hollywood or Bollywood production, when it comes to Hollywood they do not allow us to use the name of the movie or to use the movie for promotional campaigns. I cannot talk for all Slovenia but from Soca valley, the movie Narnia was shot here but we were not allowed to use the name or the photo material, video material, it was not very useful in terms of promotion for movie industry. While lets say for Bollywood there was some attempts but those were not A production movies but more B or C production from Bollywood. The good thing about Bollywood was that when they shoot in Bled they also relate to Bled and Slovenia in the movie but when it comes to Hollywood production they can shoot a movie (like this winter on Kanin mountain in Bovec) and we still do not know 100% what movie it is. Either its mission impossible or some other action movie. When the movie will be broadcasted, it is possible that they will write Switzerland or something like that. Personally, I am not very keen on promoting the country for movie production unless we get lucky by some coincidence. But the focus of the producers is not the destination and since we are facing already large numbers of tourists coming our way.

Short term effects occur for the current economy when the movie is being shot, for overnight stays and consumption.

**2. How much have you marketed Slovenia as a movie destination in the past and how?**

No we haven't marketed it in a strategic way. It is not one of our strategies to market the valley. I think the only organised campaign was through the movie fun (filmski sklad) because they offer a certain cash refund, subventions but I think that is not so much a tourist promotion but more guaranteeing jobs for movie industry in Slovenia. It is not so much the promotion of the destination.

After filming Narnia, after the production there were no sign of movie production at the destination. They took down everything, even the bridges which they created because they brought everything to the studio in Czech republic where they were

filming postproduction. Even on our signs we cannot put any names or pictures from the movie because we aren't allowed.

If we were allowed to use their promotion material, and create a campaign out of it, then it would be much better.

**3. Do you think Slovenia should become a movie destination? Why/Why not?**

Depends what kind of movies. If we really focus on a certain production or on a certain theme, if that is even possible, then yes. But just generally attracting whoever to come to Slovenia and the whole story in the movie is about some other destination, I mean it helps but since we cannot use the name of the movie, or the story, of the photo or video material, I think the priorities should be elsewhere.

**4. How do you think Film induced tourism can affect awareness of Slovenia?**

If the movie is about Slovenia, if the destination is involved in the script or the story of the movie then yes. Otherwise I don't think so because the focus is of course on the story and not on the destination. When we use Narnia for example, we contacted the producers because since its been many years since it was shot asked them if we could use the photo and the video material on a number of occasions and either they do not answer us or they do not permit us to use the name of the movie for our promotion so there is not much use of the movie industry in terms of promotion. However, this winter when we had the lockdown and they were shooting this action movie on Kanin mountain, the effect was: at least all of Bovec was full because of the overnights while the rest of Europe or Slovenia was closed due to the pandemic. That is a positive effect. But if we are talking about promotion, and using the movie as a promotion for Slovenia, I know that there is not much use of it because they do not allow us to use anything in our campaigns.

**5. What can you do to turn destination awareness into travel intention?**

When we are talking about awareness we are aiming more on ecology, sustainability, going back to basics in terms of exceptional service but without the luxury. Awareness

about the country, the environment, those are the main topics which we are trying to put out on the market. We don't want to attract mass tourism because we don't even have the capacity for it. But we should really focus on certain "niches" or target groups that will be okay with our environment, they will understand our vision. That we would like to be one of the main outdoor destinations in Europe, focused on environment, sustainability. We want to involve the local population interacting with tourists. Not separating them but trying to keep as authentic as possible, the environment that we live in. We manage certain natural destinations like Tolminska Korita and Vingar gorge, the spring of Soca, Postojna. We should use them in terms of tourist attractions but at the same time transcending the information that we want to keep the environment as it is and of course in some cases even improving those spots for future generations.

#### **6. Is there a specific movie genre which you are targeting? Why?**

Documentaries, in terms of environment. A movie came out last year which was shot for six years in Soca valley. It is called emerald river. It's a small production, mainly about flyfishing involved with ecology, with way of living in Soca valley and preserving the environment. He points out how he came to Slovenia and fell in love with it and decided to move there instead of continuing a high wage finance job in Austria. As well as pointing the negative impacts of tourism, human impact on environment. When I watched it for the first time its produced in such a nice way that could become a material for primary or secondary schools because its shot in such a nice way. Its not just about fishing but a story about this area of Slovenia but also about Europe in general and about rivers that are still not regulated by humans. It's a great movie.

Another movie is mount Mangart, a story about America troops that were left out after the second world war and they organise a ski competition on mount Mangart. Those are not big movies, but at least they tell a story about the area in a true way. Since these are not big productions and businesses, the producers are even interested promoting the movie and the destination at the same time. So it's a win-win situation.

While when we come to big productions, such as Hollywood then of course the focus is on the movie, on the earnings, on money. If I come back to Narnia. Since this is a

sequel of movies, you cannot use promotional materials before it comes out nor after it comes out because there is already the next sequel coming. So for us, those kind of big productions didn't work out. We thought that they will work out. We were even looking at examples like James Bond in Dubrovnik. But besides the short terms effects there is not many long-term effects. If we promote that Tom Cruise was skiing on Mount Kanin, that won't last long because we cannot reuse for promotional purposes. It depends on what the producers do without movie. It is out of our control. If they point out the destination as Slovenia then that is great but if they don't, we can't do anything about it. I think it's a tool that could be used but my personal opinion is that there are other ways of achieving the goals that are much better, that we can control.

We are coming to a point in the last years where destination management organisation don't just promote and informing clients but the role of managing the destination is becoming more and more important. With social media and digital marketing, we have ways to promote our country in so many ways and if we have the know how the promotion can be cheaper and more effective. But the challenges where we do not have the right know how yet, is how to manage the destination. How to keep a balance between number of clients, target groups coming to destination and all periods coming in between. Let me give you an example, Tolmin was marketed as a destination for music festivals about 20 years ago and it worked well will metal, punk, reggae festivals. There was no other tourism so it worked greatly. Then, we decided to be a sustainable boutique, green destination etc. once we started to materialise those messages, we came into conflict because there were people coming to spend their vacations in nature but they couldn't sleep because there were concerts. Those are real challenges for us.

Since we don't control the movie industry we cannot control what type of messages are sent across.

**(1) Can some genres have a negative effect on the destination?**

I don't think so. Unless there was a negative story about Slovenia, because movies unless they are documentaries are fiction so I don't think there would be a negative effect. And if there would be a negative effect it would be short term.

**7. What strategies do you use to attract movie directors to Slovenia?**

We do not have a strategy, except the movie association fund, then we as a national tourism organisation or local tourism organisation, do not have a strategy to attract the movie industry. I think these funds are not big enough to attract big producers. That's why I think a lot of movie production is made in eastern Europe because it's cheaper. In the late 80s a lot of movies were shot in Yugoslavia because they thought at the time that it would promote the country itself by shooting the movies. I think those times are long gone.

**8. How can film induced tourism positively affect Slovenia?**

Depends on the story teller. You can have a lucky shot, like winning a lottery, if someone would shoot a movie that would become super famous or timeless, then of course people would come to see certain locations where the movie was shot. But we really do not have any control over that. That's why I am saying it cannot be a strategy for tourism of the country. It can be a strategy for movie productions in Slovenia but when it comes to tourism promotion, as we do not have control, I think it would be a shot in the dark and hoping that something happens.

**9. How can film induced tourism negative affect Slovenia?**

When the action movie was filmed on Kanin in Slovenia last winter they had fake explosions and so on. This is not too great for the environment. The noise pollution, explosions, creating fake avalanches.

Some people were very proud that a famous director came to Slovenia, but other than some photos with the director there was no other effect.

**10. In your opinion, do you think Slovenia should focus on becoming a movie destination?**

No, I don't think so. At least not in the top 5 goals. This is my opinion maybe others don't agree but as our budgets are low in terms of marketing, I don't think we stand a chance to attract big production. Because our budgets are so small we also cannot influence the story because if you invest a lot, you can affect even the script but our

budgets are too small for that. Again, it's a lucky shot, if everything works out and Slovenia is mentioned and if the movie does well then we can promote. But how much will the producers allow us to promote it. once they leave they don't bother to get back to us because its not their priority. Their priority is the financial outcome or artistic outcome of the movie and not the promotion of a certain destination. If I can be a bit pragmatic, I think we should cherish our destination so much that the movie industry should come by themselves and even pay the destination.

If you asked me 10 years ago I would say yes. We even worked for a Korean production. There was a short term effect. Korean production is for Asia like Hollywood. They are trend setters. They came to film a telenovela to Slovenia. It only had an effect on tourism for one year, not more.

## Appendix 10

### Content Analysis:

| Inter view # | Paraphrasing   | Reduction              | Factor    | Category |
|--------------|--|------------------------|-----------|----------|
| 1            | No big impacts on tourism, but certainly on awareness of the valley                          | visibility of valley   | awareness | 1        |
| 1            | To some extent FIT can affect awareness, but not primarily.                                  | no major awareness     | awareness | 1        |
| 1            | showing unspoiled nature, mountains, views - for which visitors go to the Soča Valley.       | nature shots           | awareness | 1        |
| 2            | The Korean series was promoting Slovenia because it included Slovenians greatest attractions | Slovenia's attractions | awareness | 1        |



|   |  |                         |           |   |
|---|--|-------------------------|-----------|---|
| 2 | commercial movies that are seen on Netflix or are screened in cinemas will bring more awareness to destination                   | commercial movies       | awareness | 1 |
| 2 | it is easier for tourists to come visit Slovenia, when the movie location is obvious   | obvious movie location  | awareness | 1 |
| 4 | if the movie presents the location as a "fairy tale land", location can gain more awareness                                      | fairy tale land         | awareness | 1 |
| 4 | the director of Narnia drove through Slovenia, fell in love with it and chose it for its movie                                   | director fell in love   | awareness | 1 |
| 4 | Slovenia can gain awareness from movies if they are shot in a way that the location is obvious                                   | obvious movie location  | awareness | 1 |
| 5 | After filming of Narnia: Prince Caspian the Soča valley was one of the more recognizable touristic spots in Slovenia             | after movie recognition | awareness | 1 |
| 8 | Slovenia's appearance as a film backdrop can positively impact it as a tourist destination and can encourage viewers to visit it | positive impact         | awareness | 1 |
| 9 | The good thing about Bollywood was that when they shot in Bled they also related to Bled and Slovenia in the movie               | Bollywood awareness     | awareness | 1 |

|   |  |                              |           |   |
|---|--|------------------------------|-----------|---|
| 9 | FIT can affect awareness of Slovenia if the destination is involved in the script or the story of the movie                        | destination in script/story  | awareness | 1 |
| 9 | Slovenia should focus on shooting environmental documentaries. These will bring most awareness.                                    | documentaries                | awareness | 1 |
| 2 | if the storyline talks bad about Slovenia as destination or our area or people that live here, bad effect                          | bad storyline                | awareness | 2 |
| 4 | if the movie is scary or presents the location in a dark way, it loses its appeal  | scary, dark movie            | awareness | 2 |
| 9 | since movies are mainly fiction, they wouldn't have a negative effect on Slovenia, and if they did it would be short term          | no negative effects of movie | awareness | 2 |
| 2 | since we offer cash rebate scripts go through SFC, so a story which can have negative effect on Slovenia can be rejected           | Scripts go through SFC       | awareness | 2 |
| 5 | There is no specific movie genre, that we would be targeting and we do not think that some genres could negatively affect Slovenia | movie genre doesn't matter   | awareness | 2 |
| 4 | many movies are filmed in different locations which are unknown in the movie unless you read at the end                            | unknown locations            | awareness | 3 |

|   |  |                             |                  |   |
|---|--|-----------------------------|------------------|---|
| 9 | In winter a movie was shot in Kanin, and it is possible that the movie will state a different destination in it            | different destination       | awareness        | 3 |
| 1 | designing a film tourism product / experience.   | film tourism experience     | travel intention | 4 |
| 2 | it would be good to build attractions around a movie   | movie attractions           | travel intention | 4 |
| 5 | You can have different form of film tourism such as on- and off-location tourism   | on and off tourism          | travel intention | 4 |
| 2 | after the release of Korean film black knight, Korean tourists were 1st or 2nd in number visitors to Slovenia              | increase in Korean tourists | travel intention | 5 |
| 2 | If a successful Hollywood movie shot here, it could be an instant attraction that would transfer into tourism              | successful movie            | travel intention | 5 |
| 5 | Destinations let people experience and imagine how their favorite movie would be in real life by traveling to the location | experience favorite movie   | travel intention | 6 |
| 3 | tax rebate will bring more foreign productions to Slovenia, increasing awareness   | tax rebate                  | marketing        | 7 |
| 3 | the ministry of culture should focus on going to festivals like Cannes or bernilane  | attend film festivals       | marketing        | 7 |
| 2 | Slovenian film center advertises Slovenia as a film destination at film festivals  | film festivals              | marketing        | 7 |

|   |  |                             |           |   |
|---|--|-----------------------------|-----------|---|
| 2 | as a production company we advertise through newsletters and by attending film festivals                                 | newsletter & film festival; | marketing | 7 |
| 2 | Slovenia introduced a 25% cash rebate, which attracts bigger film productions  | 25% cash rebate             | marketing | 7 |
| 2 | we have very good teams that deals with visual and special effects   | visual and special effects  | marketing | 7 |
| 5 | The SFC, is part of the European Film Commission which gives us additional visibility and networking                     | European film commission    | marketing | 7 |
| 5 | We also promote SLO at all major international festivals such as the Berlinale and the Cannes and this year Focus London | international festivals     | marketing | 7 |
| 5 | In year 2017, the film industry public funding introduced a 25 % cash rebate   | 25% cash rebate             | marketing | 7 |
| 5 | We are promoting Slovenia as a green country – our slogan is Drive less. Film Green. Film in Slovenia                    | slogan to film in Slovenia  | marketing | 7 |
| 6 | The STO works closely with the Slovenian Film Center to promote Slovenia as a film destination                           | STO and SFC collaboration   | marketing | 7 |
| 6 | a special thematic brochure was created intended for the presentation of Slovenia as a film destination                  | thematic brochure           | marketing | 7 |

|   |  |                   |           |   |
|---|--|-------------------|-----------|---|
| 6 | publications are one of the most important promotional tools at specialized film fairs   | publications      | marketing | 7 |
| 6 | Slovenia presented itself as an attractive film destination in London at a fair for the promotion of FOCUS film locations                  | focus film        | marketing | 7 |
| 6 | since 2017 Slovenia allows foreign film producers up to 25% reimbursement of all project costs incurred in Slovenia.                       | 25% cash rebate   | marketing | 7 |
| 7 | A few years back we attended Cannes twice with the SFC and STO to present Ljubljana as film destination                                    | Cannes            | marketing | 7 |
| 8 | STO cooperated with the SFC in the creation of a special thematic brochure intended for the presentation of Slovenia as a film destination | thematic brochure | marketing | 7 |
| 8 | Since 2017 Slovenia has attended Cannes festival and in 2018 & 2019 also FOCUS London  | Cannes & FOCUS    | marketing | 7 |
| 8 | since autumn 2017 Slovenia offers up to 25 % of reimbursement of all project costs incurred on the territory of Slovenia                   | 25% cash rebate   | marketing | 7 |
| 9 | Slovenia offers 25% cash rebate, but this is not directed at tourism industry but Slovenian film industry                                  | 25% cash rebate   | marketing | 7 |
| 6 | STO will continue to present Slovenia as an excellent film destination, as they are  | STO future        | marketing | 7 |

|   |   |                               |           |   |
|---|---|-------------------------------|-----------|---|
|   | aware of the influence of the film industry   |                               |           |   |
| 8 | At the STO, we will continue to participate in the presentation of Slovenia as an excellent film destination            | STO future                    | marketing | 7 |
| 7 | Film tourism is not a part of the Ljubljana marketing strategy 2022 – 2027  | not in marketing strategy     | marketing | 7 |
| 9 | Soca valley doesn't have a marketing strategy to market itself as a movie destination                                   | no marketing strategy         | marketing | 7 |
| 1 | Various posts were published on social networks and thematic trail was made in connection with Narnia.                  | SM & thematic trail           | marketing | 8 |
| 2 | word of mouth from satisfied foreign companies brings in bigger projects  | word of mouth                 | marketing | 8 |
| 2 | production teams have positive experiences and return and/or recommend the location to others                           | positive experiences to teams | marketing | 8 |
| 4 | word of mouth is very commonly used to attract new productions  | word of mouth                 | marketing | 8 |
| 9 | Smaller productions are interested in promoting movie and destination at the same time, because they benefit each other | small production promotion    | marketing | 8 |
| 9 | I think it's a tool that could be used but there are other ways of achieving the  | better tools                  | marketing | 9 |

|   |  |                          |                     |    |
|---|--|--------------------------|---------------------|----|
|   | goals that are much better, that we can control  |                          |                     |    |
| 1 | there are often copyrights and restrictions on the use of materials  | copyright restrictions   | marketing           | 9  |
| 2 | it is not all dependent on us, some scripts contain exact descriptions of locations which we might not be able to offer    | locations we can't offer | marketing           | 9  |
| 4 | marketing can be tricky, because a lot of movie locations are a secret before they are released                            | secret movies            | marketing           | 9  |
| 4 | due to copy rights of movies, marketing after release of movie can be tricky   | copyright restrictions   | marketing           | 9  |
| 4 | after the release of Narnia, location was allowed to be promoted only while it was in the theatres                         | marketing restrictions   | marketing           | 9  |
| 9 | when it comes to Hollywood they do not allow us to use the name of the movie or to use the movie for promotional campaigns | restrictions             | marketing           | 9  |
| 9 | for the movie Narnia the use of the name or the photo material or video material was not allowed to be used                | restrictions             | marketing           | 9  |
| 3 | a lot of money coming in the state   | monetary effects         | effects on Slovenia | 10 |
| 3 | employment of local crew   | local crew               | effects on Slovenia | 10 |

|   |   |                           |                     |    |
|---|---|---------------------------|---------------------|----|
| 2 | the field of production services of bigger projects is growing every year by around 100%  | 100% yearly growth        | effects on Slovenia | 10 |
| 2 | depending on demand filming locations can become very expensive   | expensive film locations  | effects on Slovenia | 10 |
| 5 | Film production creates new jobs, expands infrastructure, increases investment in individual film sectors, strengthens national visibility  | cultural & economic value | effects on Slovenia | 10 |
| 5 | production companies hire local producers, catering, and hotel services, employ, and hire a full range of filmmakers and creators ( make-up artists, translators, hairdressers, parquet makers, drivers, lighting technicians to local extras,) | reduced unemployment      | effects on Slovenia | 10 |
| 5 | The ideal result of film tourism is investments in new film studios and employment of the people who work in them   | investment & employment   | effects on Slovenia | 10 |
| 5 | Direct impacts refer to the financial impacts which are caused by the spending of the film producers in the local community   | spending of crew          | effects on Slovenia | 10 |
| 5 | The main benefits from film-induced tourism will most likely be economic ones - employment, and revenues  | positive impact           | effects on Slovenia | 10 |



|   |  |                             |                     |    |
|---|--|-----------------------------|---------------------|----|
| 6 | Cash rebate has positively impacted growth of number of filming days, as well as economic, financial & promotional effects in long run | growth due to cash rebate   | effects on Slovenia | 10 |
| 8 | film tourism also encourages 'seasonalisation', as films can be shot in all four seasons   | seasonalisation             | effects on Slovenia | 10 |
| 9 | if someone would shoot a movie that would become super famous/timeless (not planned), then awareness and tourism would increase        | famous/timeless movie       | effects on Slovenia | 10 |
| 2 | other advantages include employment of local staff, use of accommodations, restaurants, bars etc                                       | employment, accommodation   | effects on Slovenia | 10 |
| 5 | three categories of positive impact: raising awareness of tourists; increased destination interest and contribution to tourism growth  | positive impact             | effects on Slovenia | 10 |
| 5 | The impacts generated by the film producers are usually always short term while the film tourists' impacts are long term               | short and long term impacts | effects on Slovenia | 10 |
| 9 | Short term effects occur when the movie is being shot, for overnight stays and consumption   | short term effects          | effects on Slovenia | 10 |
| 9 | there was a short-term effect from Korean telenovela but only for 1 year   | short term effects          | effects on Slovenia | 10 |

|   |   |                                |                     |    |
|---|---|--------------------------------|---------------------|----|
| 4 | if shoots are not done carefully, environment could be harmed   | harmed environment             | effects on Slovenia | 11 |
| 5 | positive environmental impacts include the rise of the ecological awareness and the valorization of the natural and cultural heritage                     | environmental impacts          | effects on Slovenia | 11 |
| 5 | the cultural and environmental damage, such as the damages made to cultural and natural resources or loss of cultural values and identity                 | environmental damage           | effects on Slovenia | 11 |
| 5 | not enough parking and more traffic   | more traffic                   | effects on Slovenia | 11 |
| 9 | Negative environmental impacts include noise pollution, explosions, creating fake avalanches (action movie)   | negative environmental impacts | effects on Slovenia | 11 |
| 4 | if movies are shot in the locations high season it can be uncomfortable for the crew as well as tourists  | high season shoots             | effects on Slovenia | 12 |
| 5 | social positive impacts are increase in the residents' pride; increase in understanding what the local values really are and the destination (re)branding | social impacts                 | effects on Slovenia | 12 |
| 5 | community disturbance   | community disturbance          | effects on Slovenia | 12 |
| 5 | disagreements between the government, environment activists, the community  | disagreements                  | effects on Slovenia | 12 |

|   |   |                             |                     |    |
|---|---|-----------------------------|---------------------|----|
|   | and film studios can arise if negative impacts occur  |                             |                     |    |
| 5 | overpromotion of the destination through the film   | overpromotion               | effects on Slovenia | 13 |
| 5 | indirect impacts can be the promotional impacts, which creates an attractive destination, attracting even more tourists than before | promotional impact          | effects on Slovenia | 13 |
| 1 | negative impacts could be sustainability problems and mass tourism.   | mass tourism                | effects on Slovenia | 13 |
| 3 | the film industry should be a good commercial for Slovenia to be well known in the world  | promotion                   | effects on Slovenia | 13 |
| 1 | Tourist providers are satisfied with shootings as they are out of season and contribute to the occupancy of the valley              | satisfied tourist providers | effects on Slovenia | 14 |
| 3 | accommodations which are filled by the filming crew   | full accommodations         | effects on Slovenia | 14 |
| 2 | during production, often big touristic attractions must be closed for tourists and other visitors for filming                       | closed attractions          | effects on Slovenia | 14 |
| 4 | during the filming of Narnia, the whole soca valley was occupied by the crew  | occupation of film location | effects on Slovenia | 14 |
| 5 | film induced tourism reduces the problems of seasonality because it attracts tourists all year around                               | seasonality solved          | effects on Slovenia | 14 |

|   |   |                                    |                     |    |
|---|---|------------------------------------|---------------------|----|
| 6 | Films, ads and videos can contribute to increased visibility of Slovenia and its natural beauties, which can encourage viewers to visit | increase visibility and visitation | effects on Slovenia | 14 |
| 7 | occasional closures of parts of the city that tourist frequently visit (such as Ljubljana Old Town)                                     | closure of Ljubljana               | effects on Slovenia | 14 |
| 8 | Slovenia is an attractive film destination and FIT affects overnight stays as well as consumption in the filming destination            | FIT affect hotels & consumption    | effects on Slovenia | 14 |
| 9 | during lockdown an action movie was shot on Kanin mountain, so all of Bovec was full because of the overnights while tourism was dead   | overnights during lockdown         | effects on Slovenia | 14 |
| 6 | Shooting commercials and movies affects overnight stays and consumption at the shooting destination                                     | stays and consumption              | effects on Slovenia | 14 |
| 2 | tv ads don't have an impact on tourism, because it is unknown where they are shot   | no impact from tv ads              | effects on Slovenia | 15 |
| 7 | We did not pick up on any impact of films of commercials shot in Ljubljana  | no impact of film or ad            | effects on Slovenia | 15 |
| 9 | I don't think its affected Slovenia significantly   | no affect                          | effects on Slovenia | 15 |
| 9 | but the results are minimum when it comes to the movie industry   | no affect                          | effects on Slovenia | 15 |

|   |   |                        |                     |    |
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| 9 | besides the short terms effects there is not many long-term effects of FIT  | no long-term effects   | effects on Slovenia | 15 |
| 2 | biggest attractions: nature, European historic architecture and short distances between destinations  | advantages of Slovenia | Slovenia            | 16 |
| 5 | most attractive film locations are Logar Valley, Piran, Lake Bled and the Predjama Castle   | attractive locations   | Slovenia            | 16 |
| 5 | Unique locations, that can't be found anywhere else in the world, like the Postojna Cave or Velika Planina also attractive  | unique locations       | Slovenia            | 16 |
| 5 | locations which are similar to other countries and can therefore be substitutes are the alps and urban Ljubljana  | substitute             | Slovenia            | 16 |
| 5 | Slovenia is very attractive for filmmaking because of its natural beauty and quick access to different locations  | short distances        | Slovenia            | 16 |
| 5 | four distinct macro regions: the Alpine, Mediterranean and Karst, Thermal Pannonian, and Central Slovenian region all of which can provide distinct and unique film settings. | four macro regions     | Slovenia            | 16 |
| 5 | the most distant film locations in Slovenia are not more than two hours from Ljubljana, the technical center, by car  | short distances        | Slovenia            | 16 |

|   |   |                                |          |    |
|---|---|--------------------------------|----------|----|
| 5 | It is also possible to shoot at various locations during the same day, which is very convenient especially in winter                                    | short distances                | Slovenia | 16 |
| 5 | Slovenia can provide logistical and technical support+ offer a wide range of filmmakers, film experts, artisans, and assistants                         | logistical & technical support | Slovenia | 16 |
| 6 | in 2018, STO conducted a workshop on FIT learning about the benefits and opportunities of the film industry   | FIT workshop                   | Slovenia | 16 |
| 8 | At the workshop, the benefits and opportunities of the film industry were presented and how to best use the potential of filmmaking                     | FIT workshop                   | Slovenia | 16 |
| 8 | Slovenia advantages include well-preserved historical buildings and the abundance of picturesque locations in the immediate vicinity                    | advantages of Slovenia         | Slovenia | 16 |
| 8 | Slovenia also has two climate zones; continental and coastal, which are more than welcome for filming, especially in the winter season                  | two climate zones              | Slovenia | 16 |
| 8 | Four regions, Mediterranean & Karst , Thermal Pannonian Ljubljana and Alpine offer a unique range of accessible, unique and inspiring film destinations | four macro regions             | Slovenia | 16 |

|   |  |                        |                     |     |
|---|--|------------------------|---------------------|-----|
| 3 | the state should invest in more movie studios if Slovenia should become more of a movie destination                                  | more movie studios     | Slovenia            | 17  |
| 2 | Slovenia as a market is much smaller than other destinations   | small market           | Slovenia            | 17  |
| 2 | I think that Slovenian tourism doesn't know the full potential of film tourism   | film tourism potential | Slovenia            | 17  |
| 9 | the Slovenian movie funds are not big enough to attract big producers (personal opinion)   | small funds            | Slovenia            | 17  |
| 8 | Cash refund brings increased number of filming days, positive economic, financial and promotional effects and strengthens visibility | effects of cash rebate | effects on Slovenia | all |