

Toddlers, tourism and Tobermory: Destination marketing issues and television-induced tourism

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Abstract

It has been witnessed on an international scale that destination-specific film and television has the power to increase tourism demand. For destination marketers, the projected image and the profile of visitors attracted form significant areas of concern. Nowhere has this been more marked than on the Isle of Mull, Scotland, where in 2003, a new phenomenon termed ‘toddler tourism’ was sparked by the popularity of a new pre-school children’s television programme called *Balamory*, which is filmed on the Island. This paper reports on a survey of tourism business operators on Mull and provides evidence of the nature and scope of the impact of television-induced tourism on tourism business performance and activity, indicating that the effects were concentrated spatially and temporally. Marketing implications are explored using business operators perceptions of the effects of marketing on tourism patterns and broad areas of concern for the future development of tourism as a result of television programmes are highlighted. © 2004 Elsevier Ltd. All rights reserved.

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1. Introduction

Evidence from around the world confirms the power of film and television in stimulating tourism demand in showcased destinations. Of significance to those engaged in destination marketing and management are projected image and the profile of tourists and patterns of tourism stimulated by such media exposure. Many destinations are forced to cope with a dramatic influx of visitors as a result of film and television-induced tourism, where place image becomes subject to re-evaluation by visitors as well as marketers seeking to maximise benefits for the local tourism industry. It is rare for a destination to be re-construed as one with appeal for children, as film and television-induced tourism generally reflects adult viewing experiences and decision-making. However, a new

phenomenon emerged on Scotland’s West Coast in 2003, endearingly described as ‘toddler tourism’, stimulated by the popular pre-school programme ‘*Balamory*’ (BBC TV) filmed in Tobermory, Isle of Mull. As a consequence, the Island witnessed a significant rise in tourism activity in 2003. The popularity of the programme has created a new spectacle for Mull, not seen in other locations, with a rapid launch into a ‘must see’ destination for families with young children.

This paper explores the power of children’s television as a force in place marketing, and using data from an empirical study carried out at the end of the 2003 tourist season, the impact of *Balamory* on Mull’s tourism performance is discussed. Subsequently, the issues raised for tourism enterprises and planning agencies in marketing, and managing the short- and long-term gains for the Island’s tourism industry, are explored. Riley, Baker and Van Doren (1998) stated that further research on different genres, locations and icons was important in understanding the effect of film tourism,

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which they claimed remains relatively under-researched. This research contributes to the literature in two main ways: first, in assessing the impacts of television-induced tourism for tourism business in one location, and; second, in evaluating the emergence of a specific market segment through television-induced tourism and the implications for place marketing.

1.1. *Film and television-induced tourism: a brief overview*

Film-induced tourism is defined as “tourist visits to a destination or attraction as a result of the destination being featured on television, video or the cinema screen” (Evans, 1997; D-35). Butler (1990) suggests that this form of tourism demonstrates historical continuity in place promotion through visual media, including high art, postcards, photographs and posters, traceable from the Grand Tour period. Despite some methodological difficulties in the accurate measurement of film and television-induced tourism impacts (Busby & Klug, 2001), examples of increased tourism demand abound. Specific destination effects have been discussed in several studies (Tooke & Baker, 1996; Scottish Tourist Board, 1997; Riley et al., 1998; Sargent, 1998; Busby & Klug, 2001; Beeton, 2001; Mordue, 2001; Busby, Brunt & Lund 2003; Mintel, 2003), and reiteration is unnecessary in this paper. High/profile examples of films that have created demand for specific destinations include *Braveheart* and *Rob Roy* (Scotland), *Crocodile Dundee* (Australia), and *Gorillas in the Mist* (Rwanda) (Mintel, 2003). Similarly, British television programmes with international distribution, such as *Heartbeat* and *Monarch of the Glen*, have stimulated much tourism activity in showcased locations.

Similar to destinations promoted through literary associations (Squire, 1994), which have been utilised by tourism organisations to promote and enhance tourism products, as well as extend the length of the tourist season (Busby & Hambly, 2000), a unique marketing opportunity unfolds for locations showcased in film or television. Destinations at all levels have harnessed the power of film and television programmes to attract tourists, with VisitBritain’s Movie Map being perhaps the most successful long-running campaign. Space has become divided up to signify themes for tourism consumption, such as *James Herriot Country* and *Heartbeat Country* (Urry, 1990).

In the case of television, where a show is given a peak time slot, it has the potential to act as a shop window for a destination that customers may peruse at regular intervals from the comfort of their armchair. Destination images can be shaped through vicarious consumption of television programmes because television tends to be perceived as a more credible information source than biased promotion campaigns. Further, it is argued that viewing places through film

and television is a destination experience in itself to some extent, or at the very least gives an opportunity to gather information about a place (Kim & Richardson, 2003; Riley & Van Doren, 1992). Destination exposure through television can achieve high market penetration, stimulate interest and alter perceptions of destination image (Kim & Richardson, 2003). In such a way, destinations are re-created as tourist sites with a constructed reality, generating a range of implications for tourism marketing (Morgan & Pritchard, 1998). As such, visitors are not attracted to a real experience, rather to consume the mythology created by the interplay of fiction and environmental setting. Post-tourism experiences of place through ‘simulacra’ (Baudrillard, 1983) have given rise to the emergence of the hyper-reality concept in tourism where the boundary between reality and fantasy is indistinguishable (Schofield, 1996). Pre-school children often do not distinguish between reality and fantasy (Valkenburg & Cantor, 2001), so these young viewers are more likely to think that *Balamory* is real, perhaps in the same way as avid adult soap opera fans. In such a way, hyper-reality of a child’s experience of place is likely to be greater than that of an adult. Indeed, although tourism experiences have always focused on the spectacle, Debord’s (1983) description of the society of the spectacle is ever more relevant as tourism products become increasingly diverse and consumption-based.

The implications for place marketers are clear. Destination marketing is focused on image control so when an autonomous image formation agent (Gartner, 1993), such as film or television, begins to influence visitor perceptions, the effects are likely to be unexpected and unplanned, unless a relationship exists between film producers and tourism promoters at an early stage (for example, the *Lord of the Rings* trilogy and Tourism New Zealand; and Scotland’s attempt to lure more film producers—see Ross, 2002). While increased tourism demand is what destination marketing often seek, impacts on the positioning and segmentation elements of marketing strategy can generate both positive and negative consequences for tourism activity, and create management difficulties over a longer period of time. For example, rather than increasing tourism numbers, traditional types of visitors may be ousted by film-induced visitors, which may or may not be desirable in social and economic terms (see Beeton, 2001). Such a scenario is likely to apply to destinations with limited capacity. Following this argument, a shift in consumer profile is likely to result from the filming of a children’s television programme in a small island community that normally attracts those seeking peace and quiet, scenic beauty and opportunities for outdoor activities. Consequently, ‘pester power’ has created a new form of place consumption.

1.2. 'Pester power': children's consumption patterns

'Pester power' emerged as a marketing concept in the late 1970s, stimulated by a strong economy and liberalisation of parenting styles (Evans & Moutinho, 1999). Normally associated with forms of direct consumption by children, pester power has not been applied substantially in the field of tourism marketing, other than motives for visiting Disneyland-style resorts (see, for example, Cunningham, 2001). The 'gimme generation' (Summerskill, 2001) is fuelling the child-oriented market in a number of areas of consumerism, such as character food merchandising (see Mintel International Group Limited, 2000). Children's television programmes have stimulated a huge industry, for example the value of *Tweenies* merchandise licensing, netted BBC Worldwide £100 million in 2000 (Doward, 2001). However, the under-5s market, while witnessing growth of 30% between 1991 and 1996 to £2.4 billion, focuses on essentials, such as clothing, toiletries, food and toys (Key Note, 1997).

For marketers, the issue of influenced purchasing is of great significance as parents are primary purchasers and the role of children in determining adult buying behaviour shows increasingly considerable market potential (Euromonitor, 2001). A number of studies indicate that children have substantial purchase influence (Rose, Boush, & Shoham, 2002). Longman (2000) states that children exercise more influence over family purchasing decision than at any time previously and Evans and Moutinho (1999), Gunter and Furnham (1998), and McNeal (1992) further qualify this by arguing that children increasingly influence household decision-making, such as choice of holiday destination. In the United States, it is claimed that children influenced family purchases of up to \$500 billion, including cars, holidays and homes in 1999 (Campbell & Davis-Packard, 2000). Gunter and Furnham (1998) argue that children have been encouraged as decision-makers in a more liberal style of parenting in recent years.

In tourism research, children have been largely ignored in terms of active decision-making or negotiation (Howard & Madrigal, 1990; Ryan, 1992), but in the last decade, increasing attention has been paid to the potential of children to act as influences on holiday decision-making. Ryan (1992), for example, found that children act as catalysts to visit attractions. Thornton, Shaw, & Williams (1997) argued that children possess the ability to make suggestions about holiday choice but the ultimate decision making remains with the parents. However, the authors also contended that parents rate satisfaction of their children more highly than that of themselves. Thus, an experience that do not satisfy children will have a severe knock-on effect on parents' perception of a destination (Ryan, 1992; Thornton et al.,

1997). In terms of how much influence children exert on parental holiday choice, research appears to indicate that children wield a high amount of influence in problem recognition (Wang Hsieh, Yeh, & Tsai, 2004, Swinyard & Sim, 1987), rather than at other stages of decision-making, such as information search and final purchase. Further, Jenkins (1978) found that children were considered by parents to exert significant influences in decision-making—in terms of whether to go on holiday, activities, timing and destination. Tagg and Seaton (1994) found that 74% of Scottish and 63% of English children had been asked about holiday choice, indicating that children's opinions are important to parents. Jenkins (1978) argued that marketing communications should reflect the influence of children in the decision-making process.

The decision to visit a location such as *Balamory*/Tobermory is one that is likely to be taken by a parent, either as an influenced purchase resulting from pester power, or a day out (or holiday) that might be agreeable to both parent and child. However, what is different about *Balamory* in comparison with other pre-school children's television is that there has been no significant relationship, as Kline (1993) contends, between the emergence of a new childhood mythology and the parent's wallet. With only one business licensed to produce *Balamory* goods in 2003—a shop in Tobermory itself—merchandising opportunities are very limited. The discussion now turns to *Balamory*, and the role that pester power has played in changing tourism patterns on the Isle of Mull.

2. *Balamory*—the context

The Isle of Mull is the second largest Inner Hebridean island, situated off the West Coast of Scotland (Fig. 1), and approximately 90,000 ha in size. The island comprises a range of beautiful land and seascapes, with a sparse population and is significant for its heritage and wildlife conservation. Tobermory is the Island's main settlement, with a population of just under 1000, and is a popular tourist destination. The island attracts around 400,000 visitors every year and the main access point is the 45-min pedestrian and car ferry crossing from Oban to Craignure. This route is served by one ferry with capacity for just over 900 passengers, and makes a maximum of six return crossings in peak season, strictly according to timetable.

Tobermory became famous in 2003 as the filming location for *Balamory*, a BBC television pre-school children's programme, or 'soap', that uses human characters in life-based stories, screened on terrestrial television from April 2003 and regularly watched by 400,000 viewers. The decision to film in Tobermory was strongly influenced by the town's collection of brightly

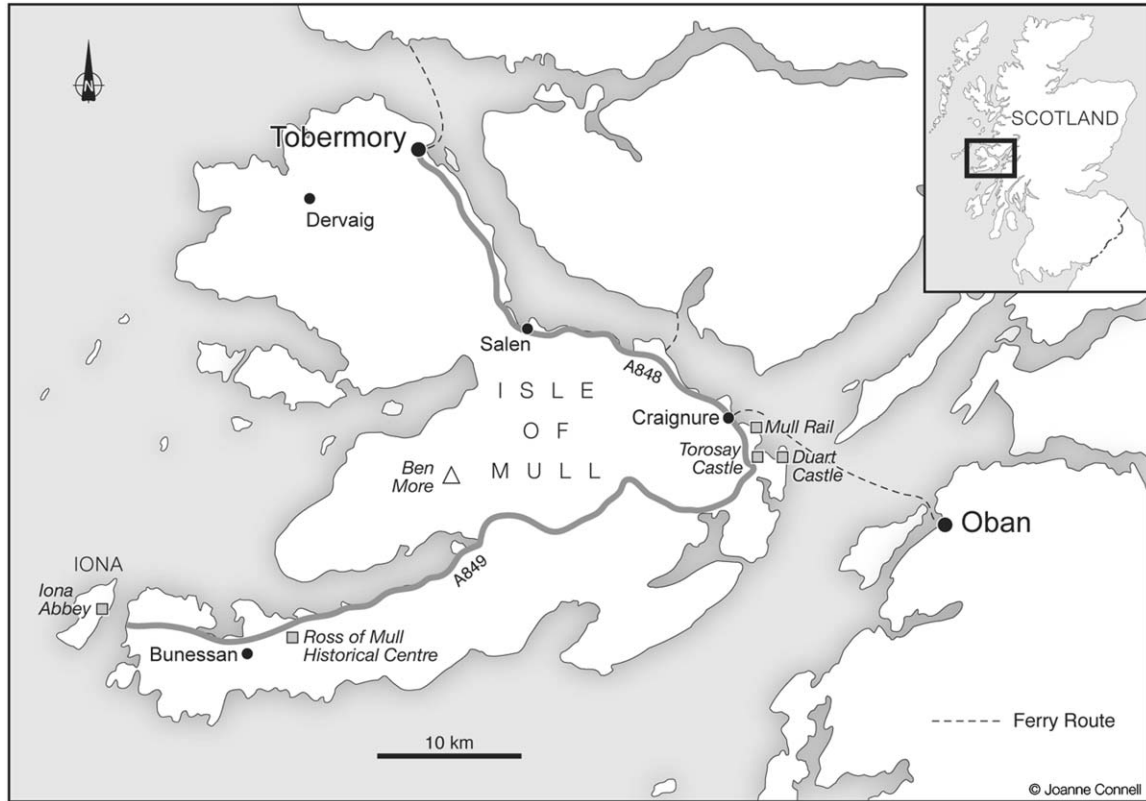


Fig. 1. Location Map of Mull.



Plate 1. Tobermory: The image of the colourful harbourside buildings is an icon in Scottish tourism.

painted houses, forming an iconic image for both the Island and this part of Scotland (Plate 1). The producer of *Balamory* considered Tobermory to be a ready-made set: the coloured houses form a central feature in each story, and act as homes to the cast of colour-coded characters. Such has been the success

of *Balamory* that it was nominated for a British Academy Film and Television Award (BAFTA) in 2003. The first *Balamory* video release became BBC Worldwide’s best-selling children’s new release within 6 days (British Broadcasting Corporation Worldwide Press Office, 2003).

Balamory tries to retain fictionality, intending not to portray the real Tobermory but a more universal location, with a more diverse social make-up (Middleton, 2003). Neither are Tobermory or Mull mentioned on the programme or its credits, despite the strong Celtic flavour in the theme music and the preponderance of Scottish accents and imagery. Conversely, the BBC *Balamory* website (www.bbc.co.uk/cbeebies/balamory) pinpoints the location of Mull, which has implications for stimulating visits through ‘pester power’, as the website is designed mainly for children’s use. The programme launch was accompanied with a BBC marketing campaign, featuring children urging their parents to take them to *Balamory*. While the BBC’s rationale was to stimulate interest in watching the show and not to stimulate tourism on Mull, the prime message appeared to be ‘take me to *Balamory*’, and that is just what materialised.

2.1. The effects of *Balamory*: early indications

For Mull’s two Tourist Information Centres (TICs), a steady increase in enquiries was experienced in 2002 when *Balamory* was solely programmed on digital TV. However, the move to terrestrial television and hence a wider audience in Spring 2003 heralded the somewhat unexpected arrival of the ‘toddler tourists’ on the Island. The numbers of enquiries received by Tobermory’s TIC in 2003 rose by 46% from April to July, while in August, there was a 94% increase compared with the same period in 2002. Most of the enquiries were from families seeking to visit the real *Balamory* (Dehany, 2003). The ferry operator Caledonian MacBrayne was not able to provide statistics on the numbers of passengers in 2003 due to issues of commercial sensitivity, although anecdotally offered that the number of toddler tourists was substantially higher than normal.

The Area Tourist Board, Argyll, the Isles, Loch Lomond, Stirling and the Trossachs Tourist Board (AILLSTTB), estimated that that number of additional visitors to Mull rose by about 150,000 in 2003, with a significant rise in the number of young families, contrary to the traditional tourist profile of the Island, which is dominated by more mature visitors (Argyll, the Isles, Loch Lomond, Stirling and the Trossachs Tourist Board (AILLSTTB), 2003a). According to AILLSTTB, almost all the increase in visitor numbers to Mull in 2003 was down to *Balamory* and associated marketing activities. The Chief Executive of AILLSTTB was quoted as saying: “It demonstrates the power of television as a marketing force, simply in terms of the influence of young children on their parents saying, ‘We must see *Balamory*’” (Argyll, the Isles, Loch Lomond, Stirling and the Trossachs Tourist Board (AILLSTTB), 2003b). Such a change in tourism demand raises a new set of challenges for tourism operators and marketers.

2.2. Marketing decisions

2.2.1. Awareness-building

The marketing strategy to date has been formulated by AILLSTTB in conjunction with Holiday Mull (the local tourism association). It has focused on awareness building of Tobermory as the location of *Balamory*, and to a lesser degree, product enhancement through the production of a leaflet and map to guide visitors to the various coloured houses. Awareness of Mull as the *Balamory* location was heightened by a PR strategy resulting in features in the national press, magazines and television news. By September 2003, it was estimated that at least £500,000 in advertising spend equivalent time was generated through television and radio air time and press coverage (Fraser, 2003).

2.2.2. Patterns of web use

Holiday Mull launched *Balamory* web pages on its home page (www.holidaymull.org.uk) in Spring 2003. The author was given access to confidential statistics on the use of the web site and found that by June, the *Balamory* main page was one of the most accessed pages on the site, peaking in August. Excluding accommodation, the web pages most requested on the site tend to be the wildlife and attractions pages. In July, there were more hits on the *Balamory* page than the wildlife pages, and *Balamory* supplanted both attractions and wildlife in August, just second to accommodation. A changing market was notable by September, when *Balamory* fell outside the ten most accessed sites. Post-season, the requests returned to a normal pattern, with wildlife and self-catering/hotels back at the top. While it cannot be claimed that *Balamory* interest produced such increases in hits, it is clear that many web users sought *Balamory* information. Also worthy of note was that the Bed and Breakfast pages were more heavily accessed when *Balamory* pages were most requested, indicating a possible association between motive for visiting and choice of accommodation, requiring validation through business operator research.

2.2.3. Perceived attitudes

Generally, an upbeat feeling about the *Balamory* effect was apparent in the public face of Mull’s tourism industry in 2003, with proactive support from the local Tourist Board, VisitScotland, the MSP for the Highlands and Islands, the media and some tourism businesses in Tobermory. In a year when the volume of American visitors (an important overseas market for Scotland) decreased through fear of travelling, attracting the domestic market became highly important, and the introduction of a new market force might at face value have been welcomed.

However, the real and potential effect of, and level of support within the tourism business community for the

addition of a new market to the tourism product offering was not clear at this point in time. More negative attitudes became apparent in some press articles, which suggested that while *Balamory* was “packing the guest houses in Tobermory” (Daily Mail, 2003), the infrastructure was creaking under the pressure of tourists and the community was becoming increasingly antagonistic towards the whole phenomenon (Crilly, 2003; Kerr, 2003). For an island with a small population, limited accommodation capacity and infrastructure, high quality environment and plethora of conservation sites, an increase in tourism demand must be carefully managed in order to sustain the tourism industry in a way that respects the integrity of the island community, economy and environment. Therefore, destination marketing must consider the needs of the Island’s economy in parallel with physical, ecological and social concerns. Importantly, the views of the local community need to be respected if promotion and development of the tourism product is to be successful (Gallarza, Saura, & Garcia, 2002) in tandem with conservation of the resource base (Murphy, 1985; Pearce, Moscardo, & Ross, 1996). The discussion now turns to an examination of research undertaken to ascertain the views and experiences of tourism business operators, a group able to provide evidence of changes in tourism activity and business performance.

3. Study of tourism business operator’s perceptions

A quantitative research study was undertaken to ascertain the nature and extent of the *Balamory* effect in the period April–September 2003, focusing on the impacts that tourism businesses attributed the *Balamory*-related phenomenon.

3.1. Methodology

3.1.1. Key informant interviews

A number of unstructured interviews took place at the initial stage of the research with the aim of scoping the subject, in terms of development of the *Balamory* effect, marketing efforts and business responses. Key informants included the Chief Executive and the Development Manager of AILLSTTB, AILLSTTB’s Island Manager, TIC staff and two business operators on Mull. In addition, a large amount of correspondence was received by the author from Islander’s and visitors expressing their opinions and experiences of *Balamory*-related tourism. Key informant interviews assisted in the design of further primary data collection through a questionnaire. While it has not been possible to include all of these qualitative sources in the analysis of results in this paper, some of the findings have been utilised in

qualifying and enriching the quantitative data where appropriate.

3.1.2. Survey of businesses

The Island’s tourism industry is relatively small in size, relatively uniform in terms of seasonality and trade, and predominantly consists of owner-operated small enterprises. Accordingly, it was deemed valid to survey all identifiable businesses involved in servicing visitors. In addition, responses from businesses across the Island were required to assess any spatial differences in business activity. A quantitative approach was used in order to obtain comparative data for businesses that could be used to ascertain the overall effect of *Balamory* and a postal questionnaire was most appropriate due to the ease provided in contacting the scattered population. Accordingly, a postal questionnaire was circulated to all identifiable tourism-related businesses on the Island using the AILLSTTB and the Isle of Mull Chamber of Commerce membership lists, along with the Yellow Pages ($n=240$). Much of the tourism sector is accommodation based, at about 60%, but supplemented by a range of visitor attractions, retail outlets, food and drink operators, and other service providers. Tourism-related businesses were defined as those that serve tourists, but also may service the resident population, such as shops and restaurants. In each case, the owner or person responsible for running the business was asked to complete the questionnaire.

The questionnaire aimed to measure perceived/actual changes in visitor numbers, average spend, business turnover and profitability during the season; and, to ascertain experiences and perceptions of the *Balamory* effect from those operating tourism businesses. The format of the questionnaire was designed to collect quantitative data and more qualitative information, with a series of closed questions, attitude statements and prompts for comments on business activity and opinions on the new form of tourism. While the responses to closed questions provided the data required, open responses assisted in qualifying responses in some cases (Keogh, 1990).

3.2. Results

A response rate of 42% overall was obtained, with 101 usable questionnaires, which compares favourably with other surveys of small tourism businesses. A significant proportion of non-response was accounted for by non-resident business owners (mainly self-catering accommodation). However, the response rate from Mull-based business operators was almost 50% and, for Tobermory-based businesses, 58.7%. Other non-respondents included a substantial number operating in parts of Mull less likely to have been affected by *Balamory*. The data suggests that those affected by

Balamory have responded in satisfactory numbers. Chi-square tests of association were used and reported where appropriate. However, the large number of items in some questions and small sample size negated against substantive reliance on statistical testing. Instead, the descriptive results provide interesting and meaningful findings that can be used in assessing implications. The following discussion explores the results.

3.2.1. Profile

A range of tourist-oriented businesses returned questionnaires, including visitor attractions, shops and catering providers, but the largest category consisted of accommodation providers (67.3%), which reflected the composition of the survey population. Most of the businesses were very small, with a median average number of full-time staff of one (and a mean of 2.43) and, in most cases, owner-operated. Some 62.4% of businesses reported an average annual turnover below £50,000. In terms of spatial distribution of responses, 38.6% represented businesses in the Island's main town, Tobermory.

3.2.2. Reported changes in business activity April–September 2003

Table 1 shows the findings relating to changes in business activity and performance. Compared with the same season in 2002, the dominant pattern of business activity experienced during April–September 2003 on Mull is that of increased volumes of customers and turnover for a significant proportion of businesses. It appears that customer spend per head has remained the same in many cases, with an increase reported by nearly one-quarter of businesses, although a substantive number were unsure. In terms of overall profitability, approximately the same number of businesses reported increases as those whose profitability has remained the same.

3.2.3. Location difference

By and large, the most significant numbers of businesses reporting increases in business activity were located in Tobermory. While further analysis highlighted businesses across Mull experiencing increases in customer numbers, more than three-quarters of To-

bermory-based businesses saw increases, and more than two-thirds reported an increase in turnover. In terms of whether business operators considered such increases to have arisen as a result of *Balamory*, two-thirds of respondents in Tobermory thought that *Balamory* had resulted in increased customer numbers, compared with just under one-third of business owners in other parts of the Island. For increases in turnover, 60% of Tobermory businesses thought that *Balamory* had led to an increase, compared with 23.9% in other parts of the Island. Concomitant with these findings is that 77.4% of businesses in Tobermory thought that there were more families than normal compared with 18.8% of businesses outside the town. A chi-square test indicated significant associations between business location and tourism activity at the 99% confidence level.

3.2.4. Business-type differences

In terms of the types of business affected most by *Balamory*-related tourism, the bed and breakfast (B&B) sector reported the highest number of businesses with increased patronage and turnover, followed by hotels/guest houses. Following from the seeming relationship between *Balamory* and B&B web pages discussed earlier, it would appear that staying *Balamory* visitors are using B&Bs more than other forms of accommodation, probably as short-break guests rather than longer-staying visitors. Some self-catering accommodation operators also reported increases although much of the limited accommodation stock is normally booked in the tourism season. Visitor attractions and retail shops also reported increases in customers and turnover, although a small number reported decreases too. Hotels/guest houses reported the highest number of businesses reporting an increase in profitability, followed by B&Bs. In terms of whether *Balamory* was perceived by operators to have affected business activity according to principal business activity, it appears that B&B providers were the only business sector to have seen the positive effects of *Balamory* on turnover and customer numbers (Table 2). However, it is clear that retail and catering enterprises witnessed more family visitors than normally expected, and a number achieved increases in turnover.

Table 1
Changes in business activity April–September 2002–2003

	Increased	Remained same	Decreased	Do not know
Customer number	61.5	26	6.3	6.3
Average per capita spend	23	48.3	6.9	21.8
Turnover	53.3	28.3	8.7	9.8
Profitability	43.3	40	4.4	12.2

3.3. Marketing *Balamory*: tourism operator perceptions

3.3.1. Perceived marketing effects

For many tourism operators in peripheral locations, finding the most effective marketing strategy to attract the consumer provides a significant challenge. The emergence of *Balamory* has provided the low-cost solution to marketing Mull as a destination, through place recognition on viewing the programme coupled with widespread editorial, stimulated by AILLSTTB. Some 51.5% of tourism businesses agreed or strongly agreed that *Balamory* had been the most effective force in attracting visitors in 2003, 18.9% were unsure, while 29.4% disagreed or strongly disagree (Table 3). In terms of principal business activity, some 73.9% of B&B operators thought *Balamory* was the most effective marketing force, compared with 28.6% of hoteliers, indicating possible differences in previous marketing efforts and expenditure between the two sectors ($p=0.04$).

The difficulty presented by new market is the desirability of that market within the wider objectives of destination marketing and development goals. The data in Table 3 indicates that it is too early to comment on how *Balamory*-induced tourism is viewed by some business operators. However, it is clear that there is not widespread welcome of this new market. While nearly half of the respondents considered *Balamory* to attract the right kind of visitor for Mull, nearly one-quarter of respondents disagreed or strongly disagreed; such

respondents were predominantly from hotels and food and drink outlets. In terms of whether *Balamory* presents a positive image of Mull to potential visitors, more respondents agreed than disagreed, although one-third were unsure. Only 32% of self-catering providers thought that a positive image was portrayed via *Balamory*, compared with 50% of retail outlets and visitor attractions.

Such a response is probably because much of the trade for self-catering depends on those seeking tranquility and the natural attributes of the Island and tends to rely heavily on the traditional profile repeat visitor (Argyll and the Isles Enterprise, Argyll, the Isles, Loch Lomond, Stirling and the Trossachs Tourist Board, Argyll and Bute Council, Scottish Tourist Board and Highlands and Islands Enterprise, 2000). As Seaton (1996; p. 364) comments, “destination images are usually stereotyped, selective notions of place characterised by expectations of the ‘other’”. The pursuit of the ‘other’ is a key aspect of *Balamory*-related tourism, and as such may not be wholly welcomed by residents and business operators seeking to cultivate a particular market segment and concerned about possible displacement effects in favour of a new, less desirable market. One-quarter of respondents thought that the *Balamory* theme was over-promoted, although a much higher proportion were unsure, suggesting that many businesses were not really fully aware of the marketing effort by the Tourist Board at that point in time. The category of business that considered the *Balamory* theme to be

Table 2
Increases in business activity as a result of *Balamory* by principal business activity

	Percentage of respondents within principal business activity		
	Number of customers increased as a result of <i>Balamory</i>	Turnover increased as a result of <i>Balamory</i>	More families than normal using my business
Hotel/guest house	46.2	38.5	57.1
B&B	68.4	56.3	35.3
Self-catering	25	31.8	24
Visitor attraction	33.3	33.3	33.3
Catering	66.7	33.3	100
Retail	60	44.4	83.3
Other	37.5	33.3	40

Table 3
Perceptions of *Balamory*-related imaging

<i>Balamory</i> ...	Percentage of respondents				
	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
Is most effective force in attracting visitors	16.8	34.7	18.9	12.6	16.8
Attracts the wrong visitors	11.6	12.6	30.5	30.5	14.7
Presents positive image to visitors	9.5	31.6	33.7	14.7	10.5
Theme is over-promoted	8.7	16.3	37	29.3	8.7

over-promoted was self-catering providers, with 43.5% in agreement, compared with 7.1% of hoteliers.

3.3.2. *Awareness, appeal and profitability: perceived effects*

In line with the delineation of film-induced tourism as sharing similar characteristics with hallmark events (Riley & Van Doren, 1992; Tooke & Baker, 1995), the extent to which tourism business operators perceived the awareness and appeal of Mull as a tourism destination, and the profitability of tourism on Mull, to have been affected by *Balamory* was explored (Table 4).

There is broad consensus that the awareness of Mull as a tourism destination has increased as a result of *Balamory*. For many visitors, Mull may not have been a place that they would have thought about visiting, or even known, about prior to *Balamory*. However, despite a positive level of agreement about awareness raising as shown in Table 4, there is less certainty about appeal and profitability of Mull as a tourism destination as a result of *Balamory*. Nearly one-third of respondents were unsure whether the appeal of Mull had increased. Again, such a response is indicative of the feeling of some business owners that *Balamory* visitors may oust the traditional market that seeks a high quality green tourism experience comprising wildlife, tranquility and outdoor activities. Of all the types of businesses, self-catering and hotel operators were the least likely to think that Mull’s appeal had increased.

Similarly, there is some uncertainty about a rise in profitability of tourism on Mull, as the *Balamory* visitor was perceived to be lower spending than the traditional visitor, and making a significant proportion of low-yielding, but high environmental impact, day visits. As to whether *Balamory* could help to extend the tourist season on Mull, some 48% agreed, 20.2% were unsure, and 31.9% disagreed. Of all the sectors, B&B providers were the most likely to think that profitability of tourism on Mull had increased as a result of *Balamory* ($p = 0.32$)

3.4. *Adapting to life as ‘Balamory’*

3.4.1. *Longevity of film and television-induced tourism*

The argument that media-inspired tourism has a short shelf life is usually strong, and supported by many

examples, from *Braveheart* to *Close Encounters of the Third Kind*. With reference to the potentially short-term nature of *Balamory*-induced tourism, few respondents planned to make changes to their businesses to deal with more families in the 2004 season. However, 13.5% planned to make changes to their marketing literature (either to increase interest for families or to inform that children were no longer accepted), and 14.6% planned to increase the appeal of their business for children in some way. Such findings firmly contrast with responses about whether changes required on Mull, with some 81.9% remarking that one or more new features or improvements were required on the Island to cope with toddler tourism. By far the biggest category of suggestions related to increasing the number of things to do for children (27%), followed by provision of wet weather facilities (a further 14%). Interestingly, it appears that few tourism enterprises are prepared to make substantive capital investments along these lines.

3.4.2. *Future potential*

In terms of the longevity of *Balamory*, 51.1% of the tourism businesses on Mull did not think that the *Balamory* effect will last very long, some 29.8% remain unsure and a further 19.2% think it will endure, so remains a debated issue of ‘wait and see’. Toddler tourism, unlike film and television-inspired adult-based tourism, has the potential to differ from the usual pattern of boom and bust associated with this form of tourism. Tobermory, and Mull, now possesses the type of marketing advantage that has the propensity to sustain interest beyond childhood into adult revisiting. Video releases will help such development, enabling a long-term ownership of the programme that may be retained by the individual or passed to siblings, and even the next generation. In addition, the style of the programme, dubbed “a pre-school soap” could prolong its existence. Unlike some of its counterparts that use animation and puppets in a studio setting, which are limited in terms of expansion, *Balamory* has an in-built capacity to adapt to environmental and social circumstances, creating a universal and timeless appeal. The programmes enjoyed by previous generations are now in vogue with today’s toddlers, including perennial favourites revamped for new audiences such as *Bill and Ben*,

Table 4
Perceptions of the marketing effect of *Balamory*

<i>Balamory</i> has increased the...	Percentage of respondents				
	Strongly agree	Agree	Unsure	Disagree	Strongly disagree
Awareness of Mull as a tourism destination	19.1	61.7	9.6	6.4	3.2
Appeal of Mull as a tourism destination	10.8	41.9	32.3	8.6	6.5
Profitability of tourism on Mull	9.8	45.7	27.2	8.7	8.7

Andy Pandy and *Noddy*. So *Balamory* may need to be considered quite differently to *Braveheart* or *Rob Roy* as it has a substantially different capacity to hold and attract a very different audience.

4. Implications for place-marketing

In the case of *Balamory*, as with most film or television-induced tourism destinations, visitors will have a desire to visit regardless of marketing efforts. The evidence for this is clear on Mull, with a significant rise in tourist numbers despite minimal promotion. So if the visitors will come anyway, why is there a need to think about marketing? The answer to this question lies in three main areas: shaping destination image; product planning; and, visitor management.

4.1. *Shaping destination image: marketing communications*

Foremost, as Kim and Richardson (2003) argue, marketing implications centre on the significant influence of film and television on destination image: place specific movies serve as destination attractors. The role for marketing Mull as *Balamory* is likely to be influential in shaping visitors' overall destination image, and those who find out about Mull through *Balamory* might be stimulated to visit the Island. Conversely, such a process may work in reverse, where repeat visitors or those looking for the unspoilt island experience may be deterred due to perceived image of the destination.

One of the most important marketing management tasks is to develop or maintain destination image in line with targeted visitor groups (Lumsdon, 1997). However, *Balamory* is an organic image source for Mull, beyond the direct influence of tourism planners (Gunn, 1972). Destination images tend to be more affected by non-promotional communications than by the efforts of tourism agencies, except in the case of little known destinations. Consequently, media relations rather than advertising may most influence destination image (Seaton, 1996). The inherent problem associated with media reporting is that as Relph (1976) highlighted, place images are transferred through opinion formers and distributed by journalists, often reinforcing stereotypical imagery. The role of tourism marketers in press relations should consider the views and experiences of the tourism operators on Mull, who make a substantive contribution to the product offering. Agreeing a policy for promoting both Tobermory and Mull that befits the needs and capabilities of the tourism sector in meeting demand is necessary but requires public, private and community sector co-operation, which may prove difficult to obtain.

For the 2004 season, the 2004 AILLSTTB accommodation brochure features Tobermory on its front cover, a substantive diversion from the 2003 brochure cover that showcased three destinations highlighting the diversity of the AILLSTTB region. On the Tourist Board website, 'Visit *Balamory*' is featured on the home page with links to essential *Balamory*-related information and attractions and accommodation. *Balamory* has also featured as a competition spot on BBC Radio 2's evening commuter 'Drive Time' programme, where the prize was to win a trip to *Balamory*, and giving further exposure of Mull as a tourism destination to an adult (and parent) audience. All of these efforts show the determination to make *Balamory* work as a tourism theme for Mull, but have the potential to stimulate demand that cannot be adequately met as well as deter the existing market. Thus, associated and substantive issues are that of the quality of the tourism product and its ability to meet expectations, and the desirability of further promotion.

4.2. *Product planning for television-induced tourism*

Managing the effect of film and television-induced tourism has been likened to that of a hallmark event, where awareness, appeal and profitability of a destination are enhanced by tourist and marketing activity (Ritchie, 1984). The major difference is that hallmark events tend to be planned and accommodated for, whereas media-induced tourism can occur more spontaneously, often without community, public sector or tourism industry buy-in, as experienced by the residents of Tobermory. In such a way, reaping the potential short and longer-term benefits offered by increased tourism demand may be minimised or maximised according to the ability and willingness to accommodate that demand and meet visitor expectations. Where *Balamory* differs from a hallmark event is in the relative lack of control over when visits are made. Several hallmark events are held on Mull every year, notably the Mull Rally, but such events tend to be held during the shoulder season. The survey data indicates a that the perception of *Balamory* as a mechanism for increasing the destination appeal and profitability, often the justification for hosting hallmark events, is sadly lacking.

An essential prerequisite in the process of dealing with television-induced tourism is a proactive relationship between destination marketing and destination management. From a destination management perspective, marketing the full spectrum of attributes and activities to visitors could help to spread the economic benefits of tourism to other parts of the Island, and alleviate the pressure on Tobermory as the one destination to which everyone flocks. There are *Balamory*-related sites across the Island that visitors

might want to go to if they knew how to get to them, for example. However, there is an inherent danger that ‘green’ destination identity may become awash with *Balamory*-related imagery, a concern clearly reflected in the survey results. Nevertheless, marketing, as Howie (2003) argues is customer oriented. If visitors to *Balamory* just want to see the coloured houses and go home again, how should their needs be met? Will they, and is it unrealistic to expect them to, be interested in other facets of Mull? While it might be naïve to expect a marketing strategy to solve the problems created by a skewed tourism industry, selected marketing tools applied within a framework for visitor management can assist in alleviating some pressures, as has been seen in many locations, for example, in Dartmoor National Park, where marketing activities were used to achieve visitor management (*Dartmoor Area Tourism Initiative, 1994*).

In such a way, marketing could help to shape appropriate perceptions and understanding of the activities and opportunities provided by a day-trip or longer stay on the Island. From the visitor perspective, there is some anecdotal evidence provided by informal feedback from visitors that the *Balamory* experience fails to live up to expectations, although such feedback is based on the opinion of parents and not children. In a children’s market, which is perhaps the least prepared to accept mediocre experiences, where satisfaction governs both child and parent perception of a destination (*Thornton et al., 1997*), ensuring that the product standard is high and meets expectations is a key determinant of success. Bridging the gap between promotion and reality must be paramount. As *Walker and Hanson (1998)* remark, unlike most marketing situations, the destination marketer has responsibility for marketing the destination but has little or no control over what is actually delivered to and experienced by visitors as management lies with others. Accordingly, there is a risk that discontinuities will emerge between the product and its marketing.

Kim and Richardson (2003) argue that it is possible to predict tourist segments likely to arise from film-induced tourism and subsequently plan for these groups. In the case of *Balamory*, the market profile is abundantly clear but the strategies required to adapt to the market are less obvious. *Riley et al. (1998)* suggest that heavy investment in a film-related project is unwise, as such forms of tourism are usually short-lived. However, a ‘wait and see’ approach is also inappropriate, as some strategic framework is necessary to reap the economic benefits in a way that befits the destination. A fundamental need to understand visitors’ perceptions should act as a precursor to destination development and more research on the experience of visitors in film and television locations is required.

4.3. *Visitor management: a role for demarketing?*

Howie (2003) argues that destination marketing must remain within appropriate boundaries. As such, the power of marketing needs to be balanced with wider community and environmental responsibilities within destinations. On Mull, it appears from the survey results that there could be a role for demarketing (*Kotler & Levy, 1971*). *Beeton & Benfield (2001)* suggest that demarketing is appropriate where balance between visitor numbers, revenue and sustainability (economic and environmental) is required. In the management of scarce resources, such as limited capacity and infrastructure, selective demarketing to market segments that are of less benefit to the destination may be justified. Using the marketing mix effectively to discourage participation in ecotourism destinations (of which Mull is considered to be within a UK context), such as increasing pricing (*Wearing & Neil, 1999*), may not be socially or politically acceptable. Further, difficulties arise where there is a multi-stakeholder interest, where conflicts exist in terms of perception of impacts. While a section of the community view *Balamory* in relatively negative terms, the view of marketing bodies is more positive, and managing that relationship is beset with complexities. Raising ferry prices, for example, to reduce demand, would have a deleterious effect on tourism overall and lead to wider impacts to the Island’s economic position. Further, ferry charges are already considered to be expensive and there is no sign that this acts as a deterrent to visitors.

The power of promotion to create positive attitudes to the environment is vast according to *Middleton and Hawkins (1998)* and may be the saviour of the increased demand faced by Mull. Exploring ways of turning perceived negatives into positives and using *Balamory* as a mechanism to introduce young visitors to the beauty of Mull’s environment is an opportunity worth exploring before demarketing is selected as the way forward.

5. Conclusions

5.1. *Marketing priorities*

As the popularity of the programme increases, the marketing priority on Mull is likely to focus on continued promotion of the *Balamory* theme. A careful approach to promotion is required as the survey reveals that the peak season capacity is exceeded, resulting in a potentially deleterious experience for visitors, host community and environment. For businesses, such a scenario is also damaging because the types of visitors received seem to be less lucrative and more difficult to manage than traditional visitors. In a destination that

needs high yielding business in the season to survive through the year, a changing visitor profile becomes more of an issue. Tourism marketers seek to establish, reinforce or change destination image (MacKay & Fesenmaier, 1997). *Balamory*, unlike most other children's TV shows, is place-centred and visual in its screen imagery. However, it is artificially created, and the attributes portrayed on screen may not match with those experienced in reality. For example, Miss Hoolie cannot be seen striding past the houses as in the introduction to the programme and Penny Pocket certainly will not be behind the counter at the sweet shop. Translating *Balamory* to reality, the question that remains is: is just seeing the coloured houses sufficient for young children? Anecdotal evidence of children banging on doors and taking photos through windows suggests not. Conversely, children seemed more than satisfied with the visual experience of seeing the arc of Tobermory's picturesque Main Street. It is parents who seem less satisfied with this somewhat unstructured and uncommercialised experience, perhaps expecting more on offer in terms of attractions and facilities (Dehany, 2003). As Couldry (1998) argued, the experience of just going to a real location to see where filming took place is eminently satisfying. Tobermory can steer itself away from becoming a simulacrum because it is a real place and visitors must experience it for what it is, rather than the constructed reality of *Balamory*.

5.2. Development priorities

The problems of developing Tobermory as a film tourism location is beset with difficulties, apart from the fact that it may be less than desirable to a range of stakeholders. From a product marketing perspective, a visit to Tobermory offers little in the way of wet weather options, and may not be considered an all year round destination. It is not capable of absorbing more visitors in peak season, when *Balamory* visitors are more likely to visit. Coupled with the basic problems of travel time, access and expense, Mull may not appeal to those seeking a cheap day out with the children, nor may it provide the thrills sought by some family visitors for a longer holiday. However, in terms of practical destination management, operators could seek to create products that meet both the goals of tourism development and visitor satisfaction, for example by telling the story of the making of *Balamory*, or developing environmental tourism interests for families with young children. It is not yet, of course, clear what the actual effects of *Balamory* will be on traditional market, and whether it will have any effect on their perception of a favoured tourism destination, whether they will engage in different spatial uses of the Island or continue as in previous years. Marketing and

development opportunities, however, can only be based on a clear understanding of changing visitor patterns, and therefore, close attention to visitor expectations and satisfaction should become a priority in the destination.

5.3. Final thoughts

This paper has illustrated the effect of television-induced tourism on a destination, and the associated marketing implications. It has been shown that media imagery has the potential to offer fantastic marketing opportunities but also creates substantive dilemmas. The perception of tourism operators is not wholly welcoming of *Balamory* as a product and the marketing implications are that maintaining a clear balance between the integrity of traditional tourism activity and maximising opportunities in a new market is the most appropriate path to forge.

Successful tourism growth management strategies tend to reflect local and community goals and circumstances (Bosselman, Peterson, & McCarthy, 1999), and film tourism locations are no different. In this way, the decisions about the level of adaptation to the new market and degree of promotion should be made locally. While it is difficult to develop equitable and politically acceptable mechanisms to reduce demand, quantity management can be achieved through marketing to those that the destination desires, promoting a sustainable tourism framework that benefits host, guest and the place. Using a marketing approach in this sense strives towards achieving balance between commercial and environmental perspectives (Middleton & Hawkins, 1998).

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