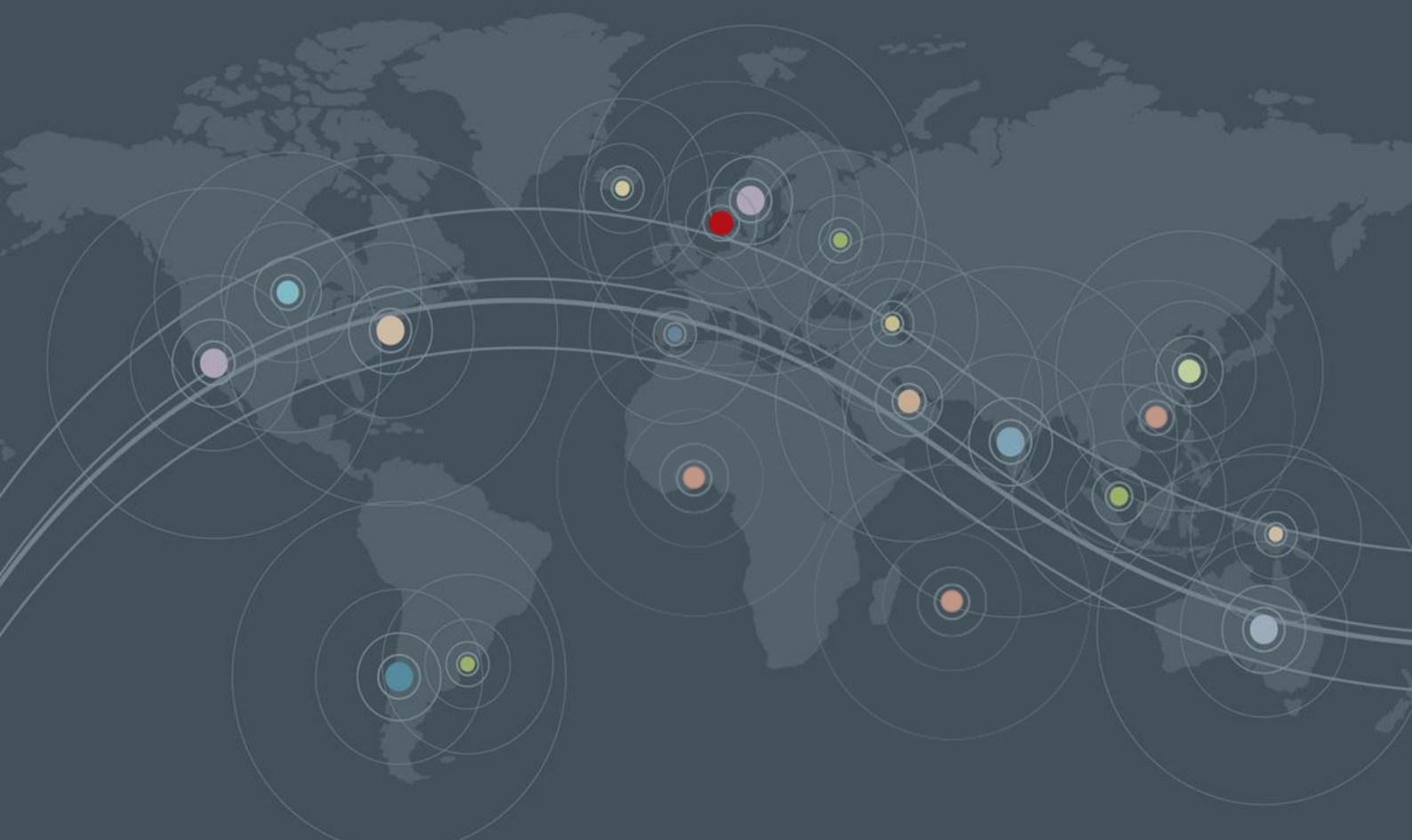


# *Prospectus for an Economic Impact Study of Sweden's Creative Industries*

**A Study Outline for Kreativ Sektor  
by Olsberg•SPI**



**1<sup>st</sup> June 2021**

**OLSBERG • SPI**

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## 1. THE CREATIVE INDUSTRIES: AN ECONOMIC POWERHOUSE

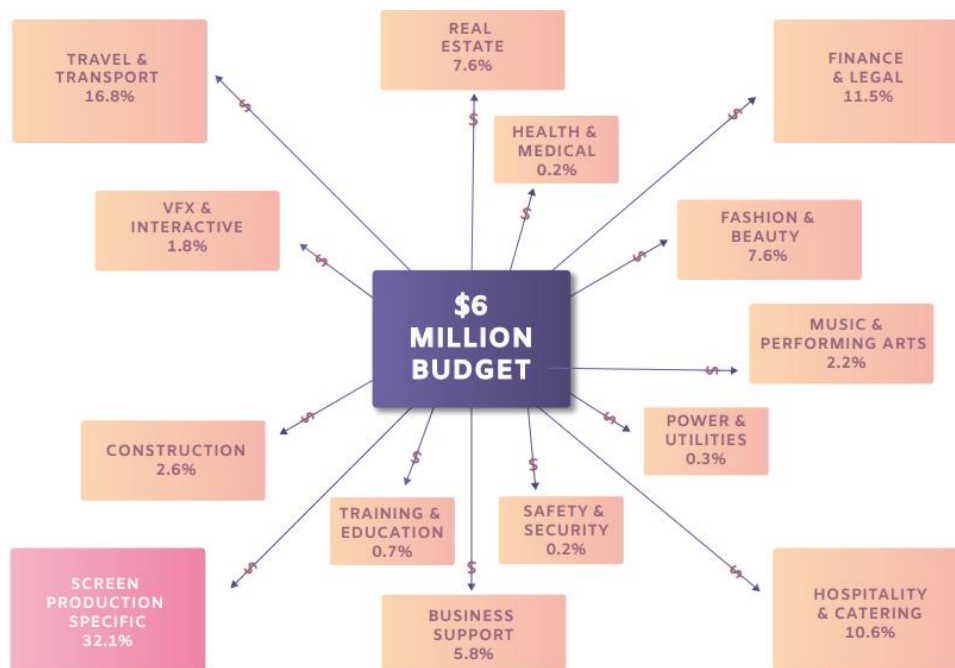
### 1.1. About This Prospectus

Sweden is home to some of the biggest brands and players within the global Cultural and Creative Industries (CCIs), including such globally-recognised and diverse icons as Zara Larsson, Minecraft, Acne Studios and global "scandi noir" drama successes, such as *The Bridge*. Swedish creativity and creative products are in demand worldwide.

The positive economic impact and strategic potential of the CCIs are increasingly recognised and valued by governments around the world – many of which are focused on building these industries for the future.

Sectors such as film, television, music, video games, fashion and advertising contribute directly and indirectly to the growth of many sectors beyond their own, as well as benefitting society on a wider basis. For example, SPI analysis<sup>1</sup> shows that, on average, 67.9% of "below-the-line" film and television production costs are spent in business sectors outside screen production-specific sector (Figure 1). In job creation terms, the CCIs represent "sunrise industries" – an expanding global ecosystem more likely to create jobs of the future than more traditional heavy industry.

**Figure 1 – Proportion of Production Spend in Other Business Sectors for a \$6m budget film (%)**



Source: Olsberg•SPI

Globally, the understanding of the unique value created by the CCIs has been driven by robust research and data analysis. For governments, comprehensive and robust insight on the value, size, shape and trajectory of the CCIs is paramount in creating effective policy and nurturing economic growth. Such studies typically cover traditional macroeconomic indicators – employment, Gross Value Added (GVA) and revenue – as well as providing a nuanced

<sup>1</sup> *Global Screen Production – The Impact of Film and Television Production on Economic Recovery from COVID-19*. SPI, 2020

consideration of the indirect and spillover benefits created. These include screen tourism, product innovation, soft power and wellbeing components.

In 2016, the Swedish Government created Kreametern, a new database acting as the first comprehensive statistical report and tracker on the economic value, size and shape of the country's CCIs. Whilst its inaugural 2017 publication provided valuable new statistics across the themes of business productivity, economic impact, composition of industries, and international comparisons, the sector and Tillväxtverket<sup>2</sup> recognised key challenges and data gaps compared to economic impact studies undertaken elsewhere. Notably, the measurements exclude new global digital and expansive parts of the sector, which have transformed Sweden's CCIs. For example, the measure of music distribution is based on record stores, rather than digital services such as Spotify, which is significantly more widely used, both within Sweden and as a Swedish CCI export. Similarly, Mojang's transnational value chain within the video game sectors is excluded.

Furthermore, the Kreametern measures lack nuance with regards to the spillover / indirect impacts of the CCIs, such as technological innovation, hospitality, national branding and cultural tourism. This also includes significant impacts on other sectors. A recent report<sup>3</sup> showed how Swedish video game software is being used within research and innovation for the automotive and pharmaceutical industries, for example. This has meant the resulting calculated economic value is likely to be significantly underestimated and misleading.

Against this backdrop, Kreativ Sektor commissioned international creative industries consultancy, Olsberg•SPI ("**SPI**") to create an outline (the "**Prospectus**") for an updated and comprehensive economic impact study for Sweden's CCIs.

Drawing from SPI's nearly 30 years of experience working within the creative industries, as well as a review of existing reports and economic data, this Prospectus provides an initial mapping exercise of several areas in preparation for a full study. These are:

- Consideration of the CCIs in the European Union (EU) in terms of economic value and strategic importance;
- CCI definitions utilised across Europe and consideration of how these compare with Sweden's current approach; and
- Analysis of approaches to measuring economic value.

Informed by this process, the Prospectus includes three possible specifications for a full economic impact study for Sweden's CCIs in Section 4.

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<sup>2</sup> The Swedish Agency for Economic and Regional Growth

<sup>3</sup> *Det svenska dataspelesundret – Digital transformation och gamification*. Entreprenörskapsforum, 2021

## **2. THE CULTURAL AND CREATIVE INDUSTRIES ACROSS THE EU**

### **2.1. Overview**

The EU has long recognised the CCI as an important pillar for society and the economy. The CCI are seen as essential for embracing the cultural diversity of member states, strengthening social cohesion and sustaining Europe's competitiveness in the global market. Furthermore, these dynamic industries are recognised for having a positive spillover effect on other sectors of the economy, such as technological innovation, hospitality and cultural tourism.

Creative Europe is a key part of the EU's economic development strategy. Through funding, advisory services and training opportunities, it is responsible for supporting the growth and resilience of EU-members' CCI, especially during the current COVID-19 pandemic that has devastated many businesses and livelihoods of creative professionals.

Part of this approach involves working with Eurostat – the statistical office of the EU – to measure and track the size and shape of the sub-sectors and CCI as a whole. Together, they publish high-quality Europe-wide statistics and indicators that enable comparisons between countries and regions.

### **2.2. Key Statistics<sup>4</sup>**

The CCI are a major economic driver within the EU. In 2019, they:

- Represented 4.4% of EU GDP in terms of total turnover – greater than that of telecommunications, high technology, pharmaceuticals or the automotive industry;
- Created total turnover of €643 billion;
- Created total added value of €253 billion;
- Employed more than 7.6 million people; and
- Added around 700,000 (+10%) jobs, including authors, performers and other creative workers, since 2013.

In 2017, the EU exported €28.1 billion worth of cultural goods, a share of total EU exports of 1.5%.

### **2.3. Establishing a Definition and Methodology**

Whilst the EU's CCI have a global reputation, current data collection and analysis of the impact of the CCI is irregular and challenging – both within the EU but also globally. Relevant authorities and academics have generated different methodologies and definitions, with results varying accordingly.

In 2005, UNESCO defined the CCI as “activities, goods and services, which... embody or convey cultural expressions, irrespective of the commercial value they may have”.

The EU takes a broader definition of the CCI as “all sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management”.

The UK's definition, meanwhile, is chiefly focused around economic value – i.e.: “Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property”. This unchanged 1998 definition covers thirteen sub-sectors: advertising; architecture; the art and antiques market; crafts; design; designer fashion; film and video; interactive leisure software; music; the performing arts; publishing; software and computer

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<sup>4</sup> *Rebuilding Europe: The cultural and creative economy before and after the COVID-19 crisis.* Eurostat, EY, 2020

games; and television and radio. Whilst this definition has become the de facto world standard, it has limitations. For example, the economic reality has itself changed since 1998, and the definition has not been updated in line with these changes, notably digitisation and the fact that increasing numbers of industries are embracing creativity as a way of gaining competitive advantage.

Based on agreed definitions, studies set boundaries for research scope. In the case of the EU, the boundaries are typically based on an agreed list of International Standard Classification of Occupations (ISCO). Typically, this entails excluding certain creative activities that are deemed out of scope and/or for which there are insufficient data. For example, the statistics reported in Section 2.2 exclude jewellery and industrial design due to insufficient data on these activities. Similarly, where creativity plays a central role but falls outside the established definition, such as gastronomy, such activities are not included.

Once a definition and eligible industries are identified, and where aggregated data does not exist, EU studies typically will construct reliable estimates based on interviews with key stakeholders, sector publications and ad hoc statistical materials, as well as tested market assumptions.

SPI's review of EU reports shows that data collection relies primarily on industry sources at national, European and global levels. The main databases used include Eurostat Structural Business Statistics, the Eurostat Labor Force Survey, Creative Europe, and national statistical bureaux.

### **3. SWEDEN'S CULTURAL AND CREATIVE INDUSTRIES**

#### **3.1. Overview**

The Swedish CCIs have grown considerably over the last decade and today are larger and more productive than numerous other industries. This has chiefly been driven by developments in digital technology enabling new ways to make and consume creative products, as highlighted in Section 1.1.

##### **3.1.1. Key Statistics<sup>5</sup>**

In 2017<sup>6</sup>, the CCIs in Sweden were estimated to have:

- Contributed SEK 36 billion (3.1%) of Sweden's GDP;
- Employed 148,000 people;
- Provided SEK 127 billion in added value; and
- Created SEK 400 billion in turnover.

Between 2010-2016, the CCIs in Sweden:

- Grew by nearly 15,000 new businesses;
- Saw added value increase by 11.4%; and
- Increased goods exports at a higher rate than the average for the entire business sector.

It should be noted that these estimates exclude certain SNI codes and their associated activity, providing an under-estimation of economic value.

#### **3.2. Establishing a Definition and Methodology for Sweden**

In 2016, the Swedish Government commissioned five governmental agencies<sup>7</sup>, charged with overseeing the country's economic and industrial development, to produce the first comprehensive statistical report and database on the economic value of the country's CCIs.

In October 2017, Kreametern, the body created to work across these agencies, published a range of sector statistics. These covered business productivity (e.g. turnover, employment), economic impact (e.g. value added), composition of industries in terms of gender distribution and individuals' backgrounds, and international comparisons. These are reported for the whole of Sweden, as well as divided into Sweden's counties / regions. Similarly, these can be shown collectively for all CCIs and divided into different industry groups.

The Kreametern agreed definition, which is used across the associated agencies, groups businesses based on their Standard for Swedish Industry Classification (SNI) – equivalent to the UK's Standard Industrial Classification (SIC) or Eurostat's International Standard Classification of Occupations (ISCO). All registered businesses choose or are assigned one 5-digit SNI code (e.g. 74 201, Portrait photography business). These categories are then split within an industry group and an industry category (Table 1).

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<sup>5</sup> Source: Tillväxtverket and Kreametern, 2017

<sup>6</sup> The most recent available data

<sup>7</sup> Swedish Agency for Economic and Regional Growth, Swedish Agency for Cultural Analysis, Swedish Agency for Growth Policy Evaluations and Analysis, Swedish National Council for Culture, and Statistics Sweden

**Table 1: Division of SNI Codes into Industry Groups and Industry Categories**

Industry group	Industry category
Architecture	Architecture
Audiovisual	Audiovisual storage media Computer game Movies & TV Radio
Image & Form	Art Design Photo
Cultural heritage	File Museums Historical and archaeological sites
Literature & Press	Press Uncategorized Literature Library
Literary and artistic creation	Literary and artistic creation
Fashion	Fashion
Advertising	Advertising
Performing arts	Music Cultural education Performing arts

Kreametern also collects data on different occupational groups via the Standard for Swedish Occupational Classification (SSYK). As with SNI codes, all registered businesses choose or are assigned a 4-digit SSYK code to categorise their employees into different occupational groups (e.g. 2655, Actor).

The size and output of each business and occupation, and the collective industry group or category, is calculated based on their submitted annual accounts to the government business register.

### 3.3. Limitation of Established Methodology

Whilst Kreametern has provided valuable data and insights across a wide range of complex industries, it has limitations, which Kreametern mention within the report. These include:

- The specific CCI definition used by Kreametern excludes key SNI codes. Most notably this includes digital markets, such as Spotify, a significant employer within Sweden's music sector, which is excluded from its calculations
- Established SNI codes are not always industry-specific. For example, one SNI code for reproduction in film or music may cause some double-counting across certain sub-sectors and not an accurate figure for either film or music; and
- Established SNI codes are outdated since they were last updated in 2007. This has meant new forms of creative activities and products may not be included, such as Immersive Technology, Virtual Reality Gaming, and Fashion Technology.



The result of these limitations, amongst others, is that the reported figures previously outlined are likely to be misleading underestimations of the real value of Sweden's CCI. This underplays the value of the CCI for policy support and its economic contribution.

Each sub-sector has therefore continued to undertake its own methodology for valuing the sector, with select examples given in Section 3.1.2. However, with methodologies and definitions varying, this makes comparisons and combining with one another and overtime difficult. For example, the Swedish Games Industry annual report handpicks companies and analysed their annual accounts found on the Swedish Companies Registration Office, rather than relying on SNI-based governmental data, which the sector body sees as inaccurate.

## **4. SPECIFICATION FOR AN ECONOMIC IMPACT STUDY FOR SWEDEN'S CREATIVE INDUSTRIES**

### **4.1. Key Considerations**

Based on established methodologies, as discussed previously within this document, and consultations with leaders within Sweden's CCI, there are therefore a number of important considerations for a major EIS of these sectors.

Each sector within the CCI is likely to be dominated and/or influenced by one or two big players (e.g. H&M in Fashion and Spotify in Music). It is important to include these players, but also important to consider outliers when calculating sector averages, as large corporations can skew figures. Furthermore, they are key stakeholders for such a study, who may be able to provide key statistics and market research.

Statistics Sweden records VAT for individual businesses. This was a common data source to calculate the revenue of specific businesses, including finding estimates for the total turnover abroad (e.g. total turnover Swedish musicians are making at concerts abroad), and would be a valuable data source for a full economic impact study.

Employment figures are a mixture of headcount and FTE across different reporting – which in itself is likely to be an average and may not include freelancers. A full economic impact study needs to be uniform or apply multipliers / proxies, where possible, to make these individual figures comparable.

Not all sectors are collecting and / or reporting on the same economic metrics, some of which are necessary to calculate economic impact. For example, Music Sverige does not report annual employment figures. A full economic impact study will therefore demand that these data are sourced or new primary research will need to be undertaken to fill gaps.

Currently, spillover / indirect impacts are not included in the Kreametern reporting, despite being one of the CCI's key strengths and strategic benefits. To reflect the holistic value of the CCI's impacts, it will be important for a full economic impact study to map and then value these impacts – which may include merchandise, for example, or the effects made by the CCI on tourism.

Non-economic benefits, such as cultural and social value are often undervalued, misunderstood or lack their own robust measurement methodology. Consultees highlighted that these are often the main reason why practitioners are employed (and will remain) in the sector. A holistic economic impact study could also consider select cultural and social indicators (e.g. impact of the CCI on sense of community or wellbeing).

The most recent annual figures for 2020 are likely to be significantly different to past averages due to the effects of the COVID-19 pandemic. The Video Games sector is expected to do well with stay-at-home orders encouraging new consumers to take up and extend their interest in gaming. However, the Music sector has forecasted a significant drop in economic growth through no concert revenue. A full economic impact study needs to be nuanced to these recent changes.

### **4.2. Potential Approaches to an Economic Impact Study**

It is not possible to create one methodology that will be able to resolve all the key considerations listed in Section 4.1. However, SPI is confident we have the expertise and experience to extend and add value to existing studies.

SPI proposes three different models to undertake an EIS.

#### **4.2.1. Macro-economic Impact Study – Light Approach**

This light-touch study will build on the Kreametern approach, definition and data. It will address the main limitations of the current measurement approach (as highlighted in section 3.3) and focus on plugging the gaps in the most problematic sub-sectors (e.g. digital games, fashion and audio-visual distribution). This will not provide new aggregate-level figures for the individual sectors and the CCIs as a whole, but instead calculate more accurate estimates for those sectors with the biggest gaps.

This work would involve the following:

- Identify the key problematic sub-sectors for focus (anticipated to be digital games, fashion and audio-visual distribution).
- Review the SNI codes and previous studies to map activity that is currently excluded. Develop an expanded definition for the key sub-sectors.
- Undertake a sector survey to identify how current activity patterns fit with SNI codes – including specific activity currently hidden by SNI codes (e.g. immersive technology or FashTec). The results of this survey would be used to determine the extent to which activity falls outside the of the current SNI classification and therefore the appropriate proportion of activity in SNI codes outside the Kreametern definition that can be included in a broader creative industries estimate.
- Along with the survey, we suggest considering a small number of 'special cases' which are large firms currently excluded from the CCI definition used by Kreametern based on their SNI code (e.g. Spotify and DICE). These are so large that we need to consider their inclusion carefully to ensure realistic overall estimates for the sub-sectors. We would undertake consultations with sector leaders and desk research to determine economic estimates for these, adding these to the Kreametern estimates for the sub-sectors they are most closely aligned with.
- An optional addition to this model would be to investigate the "Ripple Effect" of relevant sectors (i.e. supply chain analysis) where production budgets are used to see how spend is distributed or "spillover" into other parts of the CCIs and elsewhere in the Swedish economy (e.g. hospitality and tourism).

#### **4.2.2. Micro-economic Impact Study – Medium-Scale Approach**






This medium-scale economic impact study will take a bottom-up approach, bringing together sector reports for key relevant sectors and adding them together (incorporating necessary proxies and multipliers to overcome undervaluation) to deliver a total economic value.

Data permitting, this will cover GVA, gross revenue (split by sector, average business, region, in-country / abroad) and employment (split by sector, FTE, job type, skills, diversity).

#### **4.2.3. Full Economic Impact Study+ – Large-scale Approach**

This economic impact study+ will encompass the medium-scale economic impact study detailed in Section 4.2.2, but also undertake some additional research into the spillover effects for key relevant sectors. These are detailed in Figure 2.

Figure 2 – The 5 areas of SPI's Economic Impact Study+

<p><b><u>The Economy</u></b></p> <p><b>Total gross value added (GVA)</b> </p> <p>Based on direct, indirect and induced impacts typically derived from passing direct CCI-associated expenditure through Input-Output tables</p> <p><b>Gross revenue</b></p> <ul style="list-style-type: none"> <li>- By sector</li> <li>- By average business</li> <li>- By region</li> <li>- National vs. Abroad</li> </ul> <p><b>Inward investment</b></p> <p>How the CCIs attract overseas investment into Sweden</p> <p><b>Private sector investment</b></p> <p>Measuring how much the private sector invests in infrastructure and the supply chain</p>	<p><b><u>Employment</u></b></p> <ul style="list-style-type: none"> <li>- By sector</li> <li>- By FTE and headcount</li> <li>- By job type</li> <li>- By level of skills</li> <li>- By diversity</li> </ul> 
	<p><b><u>Cultural Tourism</u></b></p> <p>Measuring the spend from tourists visiting for the purpose of visiting CCI-associated locations</p> 
	<p><b><u>Comparable industries</u></b></p> <p>Where data permits, comparing the impacts of the CCIs to those of other sectors in which public investment is also made (e.g. Farming, Food, Paper/Pulp)</p> 
	<p><b><u>Other businesses and geographical sectors</u></b></p> <p>Measuring the "Ripple effect" of production spend driving economic activity in other businesses and geographical sectors (e.g. other parts of the Creative Industries and the hospitality and freight sectors)</p> 

## 5. ABOUT SPI

SPI provides a range of expert consultancy and strategic advisory services to public and private sector clients, specialising in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative screen industries.

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

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

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

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Mapping and assessment of physical infrastructure, services and workforce
- Delivering economic impact studies of whole sector activity or of incentives
- Advice on the creation of fiscal incentives for screen productions
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Feasibility studies, marketing and business strategies for small and large-scale studio facilities
- Evaluations of publicly-funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs
- International cost comparisons for small and large film and television productions
- Strategic advice on inward investment and exports for national and regional public bodies
- Analysing and explaining the links between growth in tourism and a nation's film and television output
- Providing strategic advice for screen commissions, including business and marketing plans.

Further information can be found within [our brochure](#) and [website](#).

## **6. PRIOR EXPERIENCE**

SPI has conducted a wide range of economic impact studies around the world in recent years. A selection of these is outlined below, as well as projects we have undertaken within Sweden.

### ***BFI – Screen Business***

In October 2018, the BFI published *Screen Business*, SPI's landmark study of the impacts of the UK's screen sector tax reliefs, which cover film, television (including high-end drama), and video games. This report evaluated the significant economic contribution which the UK's production incentives had generated in 2016, contextualising these within the changing screen content market.

We also worked closely with HM Government on the methodology and findings for the study, with the Chancellor Phillip Hammond signing the foreword.

### ***Film i Väst, Sweden – Production and Infrastructure Capacity Audit***

For this important regional screen agency, SPI completed an analysis of Sweden's film production capacity constraints and opportunities, including strategies for developing the sector. The aim is to help the client understand where unused capacity gaps exist and how they can be filled. The process involved a forensic mapping of infrastructure, locations, talent and crew and providing strategies for attracting and successfully handling a substantially increased level of production, in anticipation of a new national production incentive.

### ***Film i Väst, Sweden – Feasibility Study into a New Fiscal Incentive***

In May 2015 SPI presented the results of this feasibility study to Sweden's Minister of Culture. The government continued to examine the potential for an incentive, and in 2017 the Swedish Agency for Economic and Regional Growth concluded that Sweden's lack of incentive was a disadvantage for the country and recommended an incentive of at least 25% be introduced.

### ***Ministry of Culture, Ireland – Economic Analysis of the Audiovisual Sector in Ireland***

In 2017, SPI conducted a substantial analysis of the economic impact of the audiovisual sector in Ireland (defined as film, television, and games), which included a wide-ranging policy analysis, to identify how to double the size of the industry over the next five years. This was built from a wide-range of industry consultations, desk research, and data analysis, and led the Irish government to enact a €200 million, 10-year plan for the growth of the sector, based on SPI's findings.

### ***Netherlands Film Fund – Production Incentive Impact Study***

In 2018, SPI undertook an analysis of the Netherlands Film Production Incentive, the country's main support mechanism for film and TV drama. This study considered the effect of the incentive on the companies and talent operating in the Dutch production and post-production sectors, and helped the Film Fund and the sector to contextualise the impacts of the scheme within the wider changes that have occurred in the European production landscape over the last decade.

### ***Italy – Assessing the Impact of the Italian Film Law***

In 2018, SPI delivered a report for MiBAC, the Italian Ministry of Culture, providing a structure and approach for the evaluation of Italy's Film Law. This Law underpins all state support in Italy for the film and TV production, distribution, and exhibition sectors. Our analysis resulted in a clear structure for data collection and analysis of the impact of this Law for the Italian screen industries and public sector, to be implemented from 2019 onwards.

***MPA and ASA - Impact of Film and TV Incentives in Australia***

Published in March 2018, this report evaluated for the Client the impact of the Australian Federal Offset system for Film and TV production over the past 10 years, demonstrating the significant economic value which the system has generated. It then evaluated the potential impact of proposed changes to the system, underlining the additional value which could be attracted in the future.

This was used as part of the successful lobbying campaign for the expansion of the Location Offset. SPI is in the process of finalising a wider economic impact study of the entire film and TV sector in Australia, for the same clients.

***Pinewood Atlanta Studios – Economic Impact of Georgia's Film Tax Credits***

SPI completed an economic impact study of the US state of Georgia's tax credits system in 2017. This has involved deep research into a range of economic benefits for which the tax credits are responsible, including the use of the IMPLAN approach frequently used in similar studies in the USA.

***The European Audiovisual Observatory – Economic Impact Study of Fiscal Production Incentives in Europe***

In 2014, SPI undertook a ground-breaking, first of its kind economic impact analysis of all Europe's fiscal film production incentives for the European Audiovisual Observatory. This study assessed the impact of incentives on foreign investment, both from Europe and the rest of the world, as well as impacts on areas such as state budget, effects on the national audiovisual industry, employment and other related benefits.

***Pinewood Iskandar Malaysia Studios – Impact Study of Malaysia's Fiscal Incentive***

In 2011, SPI conducted a feasibility study, and recommended that the government introduce, a new cash rebate production incentive for Malaysia, which was subsequently instituted in 2012. In 2016 SPI was engaged to undertake an evaluation of the economic impact of this initiative which also included a number of recommendations for how the system could be improved.

***Institut de Cultura de Barcelona – Maximising Screen Tourism in Barcelona***

Undertaken in 2015, this study undertook an evaluation of existing evidence relating to Screen Tourism in Barcelona, and then formulated a strategy for the city to maximise screen tourism, working with incoming productions. This used a case study approach to consider a range of Spanish and international productions, identifying the key factors which led to their success.

***Creative England – Quantifying Film and Television Tourism in England***

Published in 2015, this study generated a first national valuation of screen tourism in England (outside London), building on a large-scale survey at a range of selected mixed-use tourism locations around the country, which attracted screen and non-screen tourists. A range of individual site valuations were built up from these surveys, developing a valuation for the entire nation which has subsequently been used as the basis of our wider economic impact studies in the UK, including *Screen Business*.