



THE TRAITORS: SCOTLAND ECONOMIC IMPACT

FOREWORD



The Traitors is an immense TV success story – it has proved to be the audience hit of the year across multiple seasons, with the new Celebrity version becoming the most-watched title in its weeks of broadcast.

It is fantastic that this major TV event is filmed in Scotland, and that alongside the BBC's series, the US version is also made in our nation.

Recent independent research commissioned by Screen Scotland has shown that the economic contribution of the screen industry in Scotland goes far beyond the confines of the actual production window itself. There is the immediate impact of those working on a title in the local area across many months, there is the supply chain spend in a region with a wide range of businesses, large and small, in the screen sector and beyond, and the wider – and significant – impact on screen tourism, being boosted across Scotland by multiple shows. *The Traitors* is – as this report highlights – making a substantial contribution to that economic story, especially in the Highlands, and one which should be welcomed.

Since filming began in 2022, *The Traitors*—including its US and UK Celebrity editions—has delivered an impressive estimated £21.8 million boost in Gross Value Added (GVA) to Scotland's economy, highlighting its significant economic and cultural contribution. For every job working directly on the production based in Scotland, a further 14.8 jobs were created across the wider Scottish economy as a result of the production's spending with local suppliers. *The Traitors* has also strengthened the existing screen tourism sector in Scotland.

However, since the first series was broadcast, there has been a debate about investment in Scotland and in Scottish talent. Under Ofcom's rules *The Traitors* qualifies as a Scottish production as it is made from a production base in Scotland and because over half the spend on the production team is spent on people living outside of London – although not majority Scotland-based, the team comes from Scotland, the North and South of England (outside London) and the Midlands.



It is, of course, hugely important that when the BBC invests commissioning budget in Scotland the vast majority of it is used to engage the talent and skills of people who are based here, fulfilling our role in the growth of the creative industries. As Ofcom confirmed to the Scottish Parliament earlier this year, about 90% of BBC titles made in Scotland qualify on the basis of the total production spend or production team spend qualifying as Scottish-based, not just on the location of the production base.

However, just as the drama production sector in Wales took time to develop following the BBC's decision in 2004 to produce *Doctor Who* there, the BBC is investing in Scotland for the long-term. It has probably been about a quarter of a century, the days of *Castaway*, since high-end reality entertainment television has been made in Scotland to the production standard of *The Traitors*. As such it has been necessary for the production to bring colleagues with existing reality entertainment skills to Scotland from all around the UK and the world to make the show. However, we also have an ambition to grow the number of Scotland-based crew who work on it. That has been happening. The numbers of Scotland-based crew have increased since the first series, as more people here have become skilled in reality entertainment, and I am grateful to the support that Screen Scotland has provided, partnering Studio Lambert to help bring about this growth.

Filming the US series in the Highlands was made possible by the unscripted development partnership between the BBC and NBCUniversal. Without that collaboration, it's unlikely the US series would have been based here, and the UK series may not have progressed at all. The budget would have been prohibitive without the economies of scale achieved by filming both series back-to-back.

Let's use this report to ensure we analyse the impact of a show like *The Traitors* in the round. Scotland is seeing a direct economic benefit from the filming of *The Traitors* happening here. Let's maximise all those benefits to grow the industry and its impacts in the years ahead.

Hayley Valentine
Director, BBC Scotland



Hayley Valentine

EXECUTIVE SUMMARY

This report examines the economic and cultural impact of the reality television series *The Traitors*.¹

Nine series of the show have been produced to date, including *The Traitors* and *The Celebrity Traitors* for the BBC and *The Traitors US* for NBCU. The show has been filmed in the Highlands at Ardross Castle since filming began in 2022. The show has been a huge success with both UK and US audiences. The finale of *The Celebrity Traitors* averaged 11.1m viewers with a peak of 12m, the biggest overnight audience across the market since the BBC's own record-breaking Gavin & Stacey viewing on Christmas Day 2024. The debut episode of *The Celebrity Traitors* is now the biggest unscripted title on Broadcaster VOD ever. Meanwhile *The Traitors US* was the number one unscripted show across all streaming services in 2024 and 2025. It has made a significant contribution to Scotland's screen industry, tourism sector, and local economies.

Its success has not only elevated Scotland's profile as a filming destination but also demonstrates the broader value of investing in creative industries. Between 2022 and 2025, *The Traitors* contributed an estimated £21.8 million in Gross Value Added (GVA) to the Scottish economy. This figure reflects both direct production spending and the wider economic ripple effects across sectors such as hospitality, transport, and local services. For every £1 of GVA directly generated by the production, £6.84 was added to the Scottish economy overall. The production has supported over 750 jobs in Scotland since filming began, on average 189 jobs per year, although the actual number of roles created is likely higher due to the seasonal nature of filming.

£21.8m

added to Scotland's economy between 2022 and 2025

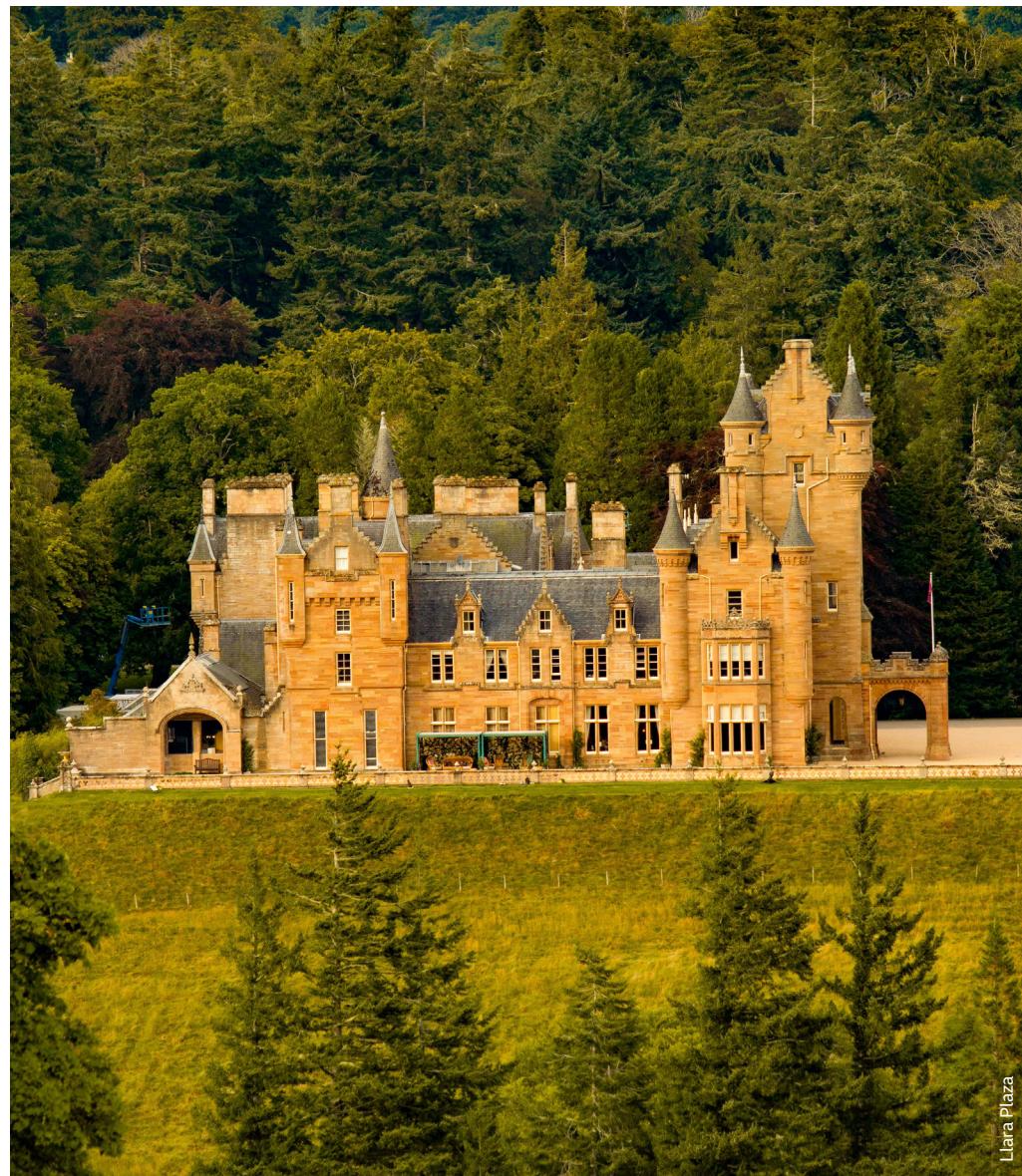
£1
Every £1
of **direct** economic
impact results in

£6.84
of **total**
economic impact

750 jobs
supported in Scotland,
equivalent to

189
jobs per year

¹ Throughout this report *The Traitors* is used to refer to all nine series of the show format that have been filmed at Ardross Castle, including the BBC's *The Traitors* and *The Celebrity Traitors* and NBCU's *The Traitors US*. Where the report is referring specifically to the BBC commissioned version of the show where participants are members of the general public this will be described as 'the BBC's *The Traitors*'.



The show has also had an impact on screen tourism. Its dramatic setting and themes of mystery and intrigue have increased interest in the Highlands from visitors from the UK and abroad, particularly the United States. Tour operator EvanEvan reported a 44% rise in searches for Edinburgh-related content and a 27% increase in Scotland wide searches in the first three weeks of January 2025, following the release of series three of the BBC's *The Traitors* and Expedia reported a 190% increase in searches for the Highlands following the release of series two. Tourists are drawn not only to the filming location at Ardross Castle but also to the broader cultural and natural heritage of the region. This has led to increased demand for local experiences, accommodations, and services, even outside the traditional tourist season.

Local businesses have reported significant benefits from the production. These include direct financial gains from contracts with the production team, as well as indirect benefits such as increased tourism. Ardross Castle, has seen a fourfold increase in event enquiries, and many local businesses report increased interest in their services. The show has also influenced fashion and lifestyle trends, with its hosts' wardrobes sparking interest in Scottish textiles and design.

Beyond its economic contributions, *The Traitors* has played a role in cultural and educational development. The production has partnered with Screen Scotland to offer training placements and plans to grow engagement with local schools to inspire young people to consider careers in the creative industries. These efforts have helped build local skills and fostered a sense of pride among residents in hosting a major television production.

Despite these successes, the report also highlights ongoing challenges to deliver sustainable growth in Scotland's production sector, particularly in the Highlands. Interviewees cited the need for more infrastructure, such as studio space and post-production facilities, as well as the need for more productions to deliver regular employment opportunities. Local professionals often face barriers to long-term employment in the industry without relocating to the Central Belt or beyond. Addressing these issues across the industry will be key to ensuring that the benefits of productions like *The Traitors* are fully realised and sustained.

The Traitors has proven to be a landmark production for Scotland. It has delivered significant economic and cultural benefits, positioned the Highlands as a credible filming location, and sparked important conversations about regional equity and the future of Scotland's screen sector.

1 INTRODUCTION

The hit reality television series *The Traitors*, filmed against the backdrop of the Highlands, has captivated audiences across the UK and beyond with its dramatic storytelling and atmospheric setting.

To date, nine series have been produced for the BBC and NBCU, including four series of the BBC's *The Traitors* and recently the first series of *The Celebrity Traitors* and four series of *The Traitors US*. Four more series are already confirmed for production in 2026, including a new US version which will see members of the general public participate, complementing the existing US show which includes celebrities. All series have been filmed at Ardross Castle in the Highlands.

As a high-profile production, the show has had a wide range of impacts, raising the profile of Scotland as a production location, boosting Scottish tourism, showcasing Scotland's dramatic landscapes and heritage to a global audience and stimulating local economies through job creation and increased demand for hospitality and production services.

This report explores the positive economic ripple effects of *The Traitors* over the period 2022 to 2025, highlighting how the show has contributed to Scotland's creative industries and reinforced its reputation as a world-class filming destination.



Studio Lambert

2 THE SCREEN INDUSTRY IN SCOTLAND

Scotland's screen sector has experienced significant growth since 2019, driven by a surge in film and high-end television (HETV) production activity.

Overall, Scotland's screen sector contributed £718 million in GVA to Scotland's economy in 2023, an increase of 15% from 2021 levels.² Employment increased by 12.1% to 12,260 FTEs over the same period.³

Within this the production and development of TV and film is the largest single contributor, with £371 million in GVA in 2023, supporting 5,420 FTE (Full Time Equivalent) jobs.⁴ However, more recent data showed that production spend in 2023 fell back from levels seen in 2021. This was largely because of US industrial action which delayed some productions to 2024. However, production spend was still above 2019 levels.⁶

The PSBs (Public Service Broadcasters) – particularly BBC and Channel 4 – remain the most significant source of demand, financing and commissioning of TV programmes and documentary films made by Scotland-based producers. PSB-commissioned content rose from £196.6 million to £223.3 million between 2019 and 2021 but was then static in 2023 due to on-going financial challenges facing the PSBs.⁷

Inward investment in film and HETV production more than doubled between 2019 and 2021 but fell back to £173.5 million in 2023.⁸ However, it is anticipated that there will be some recovery in 2024 which may help Scotland's screen sector return to higher rates of growth.

² The screen sector is defined for the purpose of this analysis to include TV and film production and development, animation, VFX and post-production, film and TV content sales and distribution, film exhibition and festivals, TV broadcast, screen tourism, film and TV education, skills and talent development, and film and TV production facilities.

³ Economic Value of the Screen Sector in Scotland in 2023, Saffery LLP and Nordicity Limited, October 2025

⁴ Full Time Equivalent (FTE) is a way to measure employment that standardises different types of work hours into a common unit. It allows part-time, full-time and temporary jobs to be compared on an equal basis.

⁵ Economic Value of the Screen Sector in Scotland in 2023, Saffery LLP and Nordicity Limited, October 2025
^{6, 7, 8} ibid



Glasgow accounts for the largest share of Scotland's GVA and employment generated by the screen industry and has become a major production hub, known for its strength in factual, features, and entertainment programming. The city benefits from local PSB commissioning and proximity to key facilities in the Edinburgh-Glasgow-Dundee creative corridor – such as The Pyramids, Wardpark Studios, and FirstStage Studios – which have supported major productions such as *Outlander*, *The Rig*, and *Good Omens 2*. Strategic investments by Screen Scotland and the Scottish Government since 2018 have played a crucial role in this growth, including funding for studio infrastructure and workforce training.

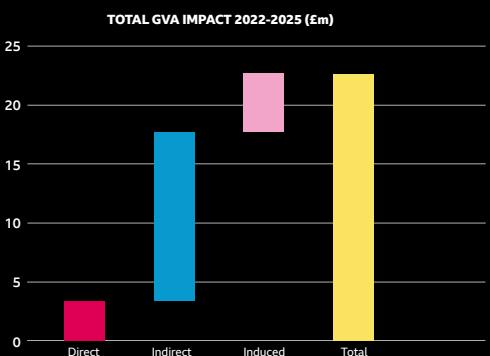
The Highlands, where *The Traitors* is filmed, accounted for £52.4 million of the GVA generated by Scotland's screen industry, and 1,000 FTE jobs in 2023.⁹



3 ECONOMIC IMPACT OF THE TRAITORS

The Traitors has had a positive impact on Scotland's economy in several ways, including a significant boost to GVA and employment through the money the production spends locally.

The production has also had wider spillover effects, including supporting a growing screen tourism industry, benefits for local businesses and residents in the Highlands and raising the profile of the Scottish screen industry.



GVA and employment

The production of *The Traitors* has had a significant economic impact on Scotland, contributing £21.8 million to the country's Gross Value Added (GVA) between 2022 and 2025. This boost reflects not only the direct spending by the production but also the ripple effects (indirect impact) across various sectors such as hospitality, transport, and local services that form the long tail of Scotland based suppliers that the production works with. It also reflects the impact of spending by local workers, on and off the production, in the local economy (induced impact).

As a result, for every £1 of GVA directly generated by the production in Scotland, a total of £6.84 was added to the Scottish economy overall. The show's filming, though seasonal, has created a surge in economic activity during its production periods, drawing attention to Scotland as a viable and attractive location for high-profile television projects, as discussed later in this report.





Across all series produced between 2022 and 2025 *The Traitors* supported over 750 workforce jobs (or on average 189 jobs per year).¹⁰ However, the actual number of roles created will be much higher as the programme is only in production for a few weeks of the year, including filming set-up and dismantling equipment after production. In 2025 the production period was 17 weeks but this is set to increase to 25 weeks in 2026 due to the commissioning of an additional US series for NBCU. For every job directly working on the production based in Scotland, a further 14.8 jobs were created across the wider Scottish economy as a result of the production's spending with local suppliers.

Between 2022 and 2025 the impact of *The Traitors* on Scotland's economy more than tripled due to increased commissioning volume from the BBC and NBCU, as well as an increased use of Scotland based suppliers and workers.

The success of *The Traitors* not only showcases Scotland's capacity to host major productions but also reinforces the broader economic case for supporting the film and television sector as a driver of sustainable regional and national development.

Screen Tourism

The Traitors is strengthening the existing screen tourism sector in Scotland, a trend where visitors are drawn to destinations featured in film or television. This form of tourism – also known as film-induced or set-jetting tourism – offers travellers a personal connection to places they've seen on screen.

Research commissioned by Screen Scotland based on data and research from VisitScotland, Moffat Centre and VisitBritain estimated that £140 million of GVA was added to Scotland's economy in 2023 because of tourism expenditure associated with screen tourism.¹¹ There was a significant bounce back in the impact of screen tourism from 2021 when the global pandemic significantly restricted travel.

Both VisitScotland and Ardross Castle have reported an increase in enquiries relating to *The Traitors*, including the possibility of visiting and staying at the castle. Tour operator EvanEvan reported a 188% interest in 'The Traitors castle' as well as a 44% rise in searches for Edinburgh-related content and a 27% increase in Scotland wide searches in the first three weeks of January 2025 after BBC's series three of *The Traitors* launched on New Year's Day.¹² Analysts at the car hire company SIXT reported a 60% increase in Google searches for "castle holidays" over January 2025, with more than 61,000 people exploring how to live like a traitor, while searches for "can you visit the traitors castle?" have increased by 400% over the past year.¹³

Last year Expedia reported a 190% rise in searches for the Highlands following season two, compared to the same dates two years previously.

¹⁵ VisitScotland's analytics team also noted a rise in the use of the search term 'traitors castle' online across the UK during January 2025 after the launch of series three.

Whilst the castle operates as an exclusive use venue and not a regular visitor attraction, several other local businesses, including accommodation providers and restaurants, that we spoke to during this research reported an uptick in interest in their services from visitors, drawn to the Highlands in large part by *The Traitors*.

The show's setting at Ardross Castle and its themes of mystery and tradition have captivated audiences, encouraging them to explore Scotland's real-life locations and broader cultural heritage. The authenticity of the setting and its reference to Scottish history were cited by interviewees as particularly important to the appeal of *The Traitors*.

¹⁰ Workforce jobs refers to the total number of jobs available in a country or region, it is the sum of employee jobs, self-employment jobs, government supported trainees and Her Majesty's Forces.

¹¹ Economic Value of the Screen Sector in Scotland in 2023, Saffery LLP and Nordicity Limited, October 2025

¹² The Herald, The Traitors' sparks a surge in Scottish interest, 22 January 2025. <https://www.heraldscotland.com/news/24877175.the-traitors-sparks-surge-scottish-interest/>

¹³ Manchester Evening News, UK castle holidays enjoying tourism 'boom' after BBC traitors, 30 January 2025. [UK castle holidays enjoying tourism 'boom' after BBC Traitors - Manchester Evening News](https://www.manchestereveningnews.co.uk/travel/uk-castle-holidays-enjoying-tourism-boom-after-bbc-traitors-12111111)

¹⁴ Daily Record, The Scottish castles set for huge visitor surge as Celebrity Traitors fever hits nation, 22 October 2025. [The Scottish castles set for huge visitor surge as Celebrity Traitors fever hits nation - Daily Record](https://www.dailystar.co.uk/travel/uk-scottish-castles-set-huge-visitor-surge-celebrity-traitors-fever-hits-nation-12111111)

¹⁵ Quote references figures published in: Expedia Magazine, And...action! The 2025 Set-Jetting Forecast, October 2024. <https://www.expedia.com/magazine/travel-trends-unpack-25-set-jetting-forecast#:~:text=Stay%20faithful%20in%C2%A0The%20Traitors%E2%80%99%C2%A0Scotland>



“It embodies that sense of mystery... myth, legends... things people really love about Scotland. Scotland has always been a popular on-screen location, turning viewers to visitors. Shetland, Outlander and now, The Traitors, are all making their mark on UK and international travel plans. It seems faithful Traitors fans can’t get enough of our beautiful country.”

Jenni Steele, Visit Scotland

Visitors’ interests often go beyond seeing filming locations (which is not possible in the case of *The Traitors*). Those in search of ‘the full *Traitors* experience’ value the opportunity to embrace and immerse themselves in Scottish heritage and tradition as well as making the most of the stunning landscape through walking and hiking or experiences like Land Rover safaris.

“Production is really boosting Scotland’s tourism economy and showcasing Scotland in a brilliant way... Hotels out of season in the Highlands... genuinely benefit”

David Smith, Director of Screen Scotland

We heard that tourists inspired to visit Scotland by *The Traitors* likely come from a wide range of countries and regions. Rail company Trainline reported a 69% rise in bookings to Inverness, the nearest city to Ardross Castle, since *The Traitors* began.¹⁶ Whilst many visitors originate from the UK, US visitors are particularly likely to be drawn to the Highlands after seeing the show, possibly as an extension to a visit to the UK and Scotland’s major tourist destinations. Both the BBC’s *The Traitors* and *The Traitors US* are available to US audiences, and both are filmed at Ardross Castle.



¹⁶ The National, Booking to Highlands skyrocketing due to Traitors effect, data shows, published 20 January 2025.

¹⁷ VisitScotland, Scotland Visitor Survey 2023, published 4 October 2024, <https://www.visitscotland.org/news/2024/visitor-survey-2023>

¹⁸ *ibid*

¹⁹ VisitScotland analysis of International Passenger Survey, 2024, [Visitors From the United States | VisitScotland.org](https://www.visitscotland.org/visitors-from-the-united-states)

²⁰ *ibid*

²¹ Scotland Visitor Survey, November 2024, [spotlight-us-visitor-to-scotland.pdf](https://www.visitscotland.org/spotlight-us-visitor-to-scotland.pdf)

According to the Scotland Visitor Survey 2023, 1 in 5 leisure overnight visitors were inspired by film, TV, or literature, with this figure rising to over a third among European visitors and 37% among long-haul travellers.¹⁷ Among US visitors specifically, 39% cited film, TV, or books as a source of inspiration.¹⁸ *The Traitors* joins a prestigious list of productions—such as *Outlander*, *Harry Potter*, and *Braveheart*—that have helped showcase Scotland to global audiences over many decades.

The United States has become Scotland’s largest international source market, and *The Traitors* had a timely broadcast as international travel resumed following the pandemic. In 2024, US visitors accounted for 22% of all overseas trips to Scotland and 36% of all overseas spending.¹⁹ The number of visits from the US reached a record high—21% above 2023.²⁰ This surge is partly attributed to favourable exchange rates and a strong emotional connection to Scotland’s heritage, scenery, and ancestry. Alan Cumming’s portrayal as the host of *The Traitors US*, embracing a theatrical and dramatic approach against a rich backdrop of Scotland’s heritage and scenery was cited as likely to be particularly appealing to US audiences. US visitors increasingly travel for holidays rather than business or family visits, and many are drawn by the promise of immersive, story-rich experiences like those portrayed in *The Traitors*.

The Scotland Visitor Survey also revealed that American tourists are energetic and experience-driven, seeking destinations packed with history, culture, and adventure. Many use travel intermediaries to plan their trips, but a significant number also book directly with providers, especially for accommodation and transport.

With 47% of US visitors likely to return within five years, the momentum shows no signs of slowing.²¹ *The Traitors*, with its compelling narrative and magnificent Scottish setting, has not only entertained global audiences but also helped position Scotland as a must-visit destination for culturally curious and emotionally engaged travellers.



Euan Cherry

Impact on local businesses and residents

Due to its filming location, the production of *The Traitors* relies heavily on a range of local businesses including transport services, accommodation, catering, construction services, equipment hire and energy services.

Interviewees expressed strongly positive views on the impact that *The Traitors* has had on their business including positive financial and brand impacts. This includes the direct impact through the sizeable contracts that a production of the scale and longevity of *The Traitors* offers but also the indirect financial benefits, including from screen tourism as noted above. In the case of Ardross Castle which operates as an events venue, including for weddings, they have seen a dramatic increase in enquiries to hire out the castle of around four-fold which they attribute directly to the impact *The Traitors* has had on their public profile. While many of these enquiries are speculative and individuals may not fully appreciate the cost and logistics involved in hiring out the castle, the castle now finds itself fully booked each year and often with more interest than it can service.

Several of the businesses we spoke to who work closely with Studio Lambert (the producers of the show) and the production team spoke about their positive working relationship. They cited the excitement that staff experience in having the chance to work with the production, good communication, planning and a friendly and easy working relationship.



“We always get plenty of notice before filming starts, so it’s never a surprise. The communication is really good, which gives our staff time to prepare. That makes a big difference. They’re lovely people to deal with. So you know it’s a win win, to be honest with you, and we look forward to it and we try our best to give them what they’re asking for.”

Catriona Cameron, Owner, Art House Apartments, 30 Degrees Laundry, The Mustard Seed restaurant

“It’s brought business to local taxis and shops, specifically building suppliers, wholesale suppliers and hotels—mainly in surrounding areas of Alness & Inverness. It has helped attract visitors to the Highlands.”

Loukas Tsarmaklis, Director, Ardross Castle

The show’s influence extends beyond tourism to fashion and lifestyle, with Claudia Winkleman’s wardrobe sparking interest in Scottish textiles and design and Alan Cumming also embracing Scottish heritage and design. This cultural impact, amplified by media and social buzz, has created new opportunities for local businesses and artisans.

“What stands out is how the show highlights Scottish style and heritage—like tartan, tweed, and local textiles. The stylist even mentions where items are sourced from, which promotes those places. It’s more than just showing the scenery; it subtly shares Scotland’s culture and gives local businesses a boost. It adds a rich, deeper layer to the show.”

Jenni Steele, VisitScotland

Although not a title that is necessarily intended to focus on strong portrayal of Scotland and the Highlands, that embedded sense of Scottishness was picked up by several interviewees. They also highlighted the sense of pride that local people have in playing host to *The Traitors* and seeing the beauty and heritage of their home reflected on screen. Large scale productions can often create challenges for residents because of road closures, large transport vehicles and other issues. The production company, Studio Lambert, work closely with Screen Highland and the local council on these logistical issues and overall, the community strongly support *The Traitors* being filmed locally.

“I know from like a Council perspective, local councillors were really on board with it and the local community were really excited about there being a big production in their area and showing off that region of the Highlands”

Clare Piggot, Screen Highland



Impact on the production sector

The Traitors is a globally successful factual entertainment TV format, with All3 now making versions of the show in many territories across the world. This global success results from the BBC and NBCU commissioning together the UK and US versions filmed in the Highlands.

Both UK and US versions of the show (commissioned by BBC and NBCU respectively) being made in the Highlands is a significant achievement for Scotland's screen sector. The show has been a huge success with both UK and US audiences. The finale of *The Celebrity Traitors* averaged 11.1m viewers with a peak of 12m, the biggest overnight audience across the market since the BBC's own record-breaking *Gavin & Stacey* viewing on Christmas Day 2024. The debut episode of *The Celebrity Traitors* is now the biggest unscripted title on Broadcaster VOD ever. Meanwhile *The Traitors US* was the number one unscripted show across all streaming services in 2024 and 2025.

The BBC and NBCU unscripted development partnership was instrumental in bringing *The Traitors* to audiences in the UK and the US. This commissioning approach gives producers of unscripted content access to a unique opportunity to enable them to produce their ideas at scale. Meanwhile both NBCU and BBC benefit from back-to-back filming at the Scottish hub which amortises costs for both. The strong relationship between NBCU and BBC underpins the success of *The Traitors*, with the US version being acquired by BBC and finding large audiences on iPlayer.

"The BBC and NBCU partnership demonstrates the powerful impact you can have when broadcasters with shared creative ambitions come together. It has unlocked activity and investment in the UK across both *The Traitors* and *Destination X*. And in the case of *The Traitors*, it has made Scotland the home of an idea and a format that has then

travelled globally. *The Traitors* is a calling card for Scotland's screen industry and proof that Scotland is a great place to produce a global hit."

Ed Havard, Senior Vice President, Alternative Programming, NBCUniversal



The combination of funding from a UK PSB as well as international inward investment mirrors the factors which have underpinned the success of Scotland's screen sector, as outlined earlier in this report. The scale and duration of investment resulting from this commissioning volume brings significant benefits to Scotland's screen sector.

"It is one of the larger ones. It provides a guarantee for us that we know we'll have one big project a year at least that will be filming here for a good chunk of time..."

That area of Highlands wasn't really used that often for filming and suddenly it's become a lot more popular... It's shown that large productions can come here and film here – it's not impossible."

Clare Piggot, Film Locations Officer at Screen Highland

The consistency of the production is rare in the Highlands and provides a dependable boost to the local economy. 20% (over £4 million in GVA) of the total economic impact of the series between 2022 and 2025 is felt within Scotland's audiovisual sector. *The Traitors* has demonstrated that the Highlands can support a high-end, logically complex production and this has encouraged confidence among local authorities, producers and local suppliers.

The production has helped build a case for further investment in infrastructure. Interviewees referenced Scotland's growing post-production and VFX sectors, and *The Traitors* contributes to this momentum by showcasing the country's potential.

"There's huge potential for more productions like *The Traitors* in the Highlands—we already support several film crews a year, and with attractions like the North Coast 500, the region is ready for even more."

Philippa Tougher, Arnold Clark



Euan Cherry

However, despite the strengths of Scotland's screen sector, particularly in the Central Belt, *The Traitors* is still a relatively novel production as a high-end reality entertainment show. It is critical that the production team can draw on the full strength of the UK's production ecosystem to deliver a show of the highest quality to serve UK and global audiences so that investment in the series can be secured in future years. Many of the crew and suppliers are used for both series commissioned by the BBC and NBCU, building valuable experience in the UK as well as enabling Studio Lambert to deliver the volume of episodes from a single filming location.

Studio Lambert has been working closely with the BBC from the first series of the BBC's *The Traitors* to secure local crew and screen sector suppliers where possible. Series one and two of the BBC's *The Traitors* both qualified as Made out of London productions under Ofcom's regional production guidance as they are made from a substantive base in Scotland (i.e. Studio Lambert Scotland) and over 50% of off-screen talent spend is outside of London (a combination of Scotland, North England, South England and Midlands and East Anglia). As such, according to Ofcom's guidance, they are allocated as Scottish productions due to the location of the substantive base and over 50% talent spend outside of London.

It is important to note that the series produced for NBCU, which represent generally half of the commissioning volume, are not required to meet the same criteria. However, where the production has been able to increase the number of Scottish crew on the UK version this is able to be translated across to the US version.

The production has taken steps to support the development of local skills and talent, including building specialist filming and post-production skills that are needed for high-end reality entertainment shows. Screen Scotland partnered with Studio Lambert and the BBC to create training



Euan Cherry

placements across various roles, including edit producers, welfare assistants, and production managers. These roles ran an open recruitment process and focussed on attracting applicants with a positive economic contribution to Scotland, as Scottish taxpayers.

"We're happy with what we've been able to achieve in quite a short period of time this year (2025), working with the BBC and Studio Lambert. We would like to go further and work with them to ensure Scotland-based directors, editors, and producers work within *The Traitors* structure and within Studio Lambert more broadly and I think we've got the good foundation for a really positive relationship there."

David Smith, Director of Screen Scotland

Through school visits, the production is seeking to increase engagement with young people in the local community to inspire them to consider a career in the creative industries.

"Some of the crew from *The Traitors* visited a local school to talk about their work, which really opened students' eyes to career paths in TV they hadn't considered before. The feedback from pupils, parents, and staff was incredibly positive."

Clare Pigott, Screen Highland

Interviewees described the show as a "phenomenal showcase" for the Highland's natural and built environment, adding that it contributes to a "soft portrayal" of Scotland through its visual aesthetics.

Despite these successes, the interviewees also reflected the on-going structural challenges in the Scottish production sector. These were particularly acute for production in the Highlands and the challenge of creating an integrated sustainable local creative ecosystem that supports large-scale productions with global appeal, like *The Traitors*, and smaller-scale productions that mostly serve Scottish audiences.

"The Traitors is a big, successful show that brings attention to the Highlands and inspires interest in TV production. But while it offers trainee opportunities, there's still a lack of clear pathways in the region into long-term employment

For small production companies in the region it's also very difficult for them to get in anywhere because they are small. Their track record has been in Gaelic, and for whatever reason, that doesn't always carry across as being seen as a proper commission."

Iain Hamilton, Head of Creative Industries, Highlands & Islands Enterprise

They highlighted the need for more facilities in the Highlands, such as studio space and post-production services, to ensure that productions like *The Traitors* can have an even greater economic impact on the region.



They also raised challenges around creating sustainable careers in the screen industries, without the need to move out of the region to progress. Many local professionals still need to supplement their income with other jobs or travel to the Central Belt for work.

There was optimism that the success of *The Traitors* could be built upon into the future. Interviewees highlighted the potential for collaboration between public agencies, educational institutions, and industry stakeholders. Screen Highland is currently working with the University of the Highlands and Islands (UHI) on talent development, including workshops and student engagement. *Outlander* was cited as a successful blueprint for long-term skills development and strategic partnership that could be applied to *The Traitors* in the future.

Ultimately, *The Traitors* has helped cement Scotland's reputation as a global destination for screen production, with particular impact in the Highlands. It has shown that the Highlands can host high-end productions, inspire new talent, and spark important conversations about the future of commissioning and regional equity.

"The fact that Studio Lambert is making this in Scotland successfully is in-and-of-itself a good thing. But with each subsequent series we want to see deeper, higher-quality outcomes that create jobs for Scotland-based crew and drive the creative economy in Scotland."

David Smith, Director of Screen Scotland



Euan Cherry



Looking Forward

With yet more filming across more series already planned for 2026 the economic impact *The Traitors* has on Scotland, and particularly the Highlands, is likely to increase. It has already increased more than three-fold since the series began production in 2022. In 2025 several key suppliers for the production that operate nationally set up operations in Scotland, in part to better serve *The Traitors*.

Studio Lambert is continuing to work with Screen Scotland and the BBC to deliver training placements which offer Scottish creative workers a unique and valuable entry route into the industry on a high-profile, high-value production that they may not normally get.

The BBC and Studio Lambert are also looking at ways to bring in Scottish staff both at the start of their career and those with experience but in a different format so that they can build the expertise needed in this specific format, while maintaining the highest possible quality control on a show. Longer term the production also hopes to see progression for local talent working on the show, an impact seen across similar multi-series productions, and there are some early examples of this happening across a variety of roles.

As this report shows, *The Traitors* has made a very significant impact in Scotland including the production sector. While a single show alone cannot provide the year-round opportunities the sector needs to address the existing sustainability challenges, *The Traitors* forms part of a significant portfolio of BBC and other PSB commissions in Scotland, in English and Gaelic, across multiple genres, from dozens of independent production companies.

The BBC published guidance in May around how it will continue to commission new content made in the devolved nations so that a sustainable career pipeline can be maintained and further developed over time from entry-level to the most experienced and highest value roles.²²



Annex I: Impact methodology

This annex sets out the approach that has been taken in this report to assessing the economic impact of *The Traitors* on Scotland. We measure economic impact via gross value added (GVA), calculated on the basis of the income approach.²³

GVA, in simple terms, is an economic productivity metric that is the value of goods and services less the cost of all inputs and raw materials. We estimate three main components of GVA:

Direct – first round effects of the production that generate business activity and output. Consistent with prior analyses of the BBC GVA, this includes employment costs of staff and freelancers as well as value-added (profit) captured as production fees.

Indirect – second round effects generated in the supply chain as a result of the production's procurement of goods and services that become inputs to the production. These include goods and materials bought directly by production (e.g. materials and items for set and costume design) as well as services procured as part of the production (e.g. hiring on-set caterers and other hospitality, contacting companies to provide specialised services such as security, SFX or VFX).

Induced – multiplier effects that arise in the wider economy as a result of the production's direct employees and those employed in the supply chain spending their wages. This spending generates additional economic activity for those businesses from which these employees buy goods and services as well as their wider supply chains.

The production activity may also generate spillover effects for those not directly involved in the production – i.e. benefits (or costs) to businesses, society and government. These can be disparate and are harder to quantify. We, therefore, do not quantify spillover effects. However, we qualitatively acknowledge some of the spillover effects, for example skills and training in the main body of the report.

To estimate the economic impact of productions in Scotland, we use data provided by the Studio Lambert who make *The Traitors*. This is then used as an input to the BBC's in-house GVA model.²⁴

The BBC's in-house GVA model uses the income approach and provides an estimate of direct, indirect and induced GVA. The model used for this analysis contains GVA multipliers produced the Scottish Government. Therefore, it reflects the productivity and concentration of industries in Scotland.

The model also estimates the employment impact of production activities in Scotland. The model calculates employment figures by taking the GVA estimate and dividing this by estimate of GVA per workforce job. Workforce jobs is the sum of employee jobs, self-employment jobs, HM forces personnel and Government supported trainees.



Euan Cherry

23. This is consistent with the approach taken in KPMG, Assessment of the Economic Impact of the BBC. March 2021

24. The in-house model has previously been adapted to assess economic impact (GVA) of Waterloo Road, Green Planet and Doctor Who. The model was developed by BBC economists and applies the principles of the input-output modelling used by KPMG (March 2021) to assess overall economic impact of the BBC in FY2019/20. Refer to KPMG (March 2021) annexes for further details.

Annex 2: List of Contributors

We'd like to thank everyone that has supported and contributed to this research.

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