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Leveraging
THE FILM INDUSTRY
for Development

9 • 2011

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I D E A Z

Volume 9 • 2011

ISSN 0799 1401

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ISSN 0799 1401

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The Centre for Tourism and Policy Research

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p: 876.970.1467

Produced by Arawak publications Consultants for CTPR



EDITORIAL

Ian Boxill

Editor & Carlton Alexander Professor
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GLOBALIZATION and the ongoing global economic crisis have forced many countries across the world to look at new ways of developing their economies. Small states like those in the Caribbean have had to find alternatives to tourism and financial services to compete and survive in an increasingly hostile global economy. In Jamaica many policy makers, cultural workers, academics and others have been arguing for many years that there should be greater focus on the cultural industries as a source of economic development. One such industry that has attracted a great deal of attention is the film and television industry. Globally, some of the major players in the film and movie industry are Hollywood (USA), Bollywood (India) and, recently, Nollywood (Nigeria). With an increasing number of Jamaican films showing in the international market, many people are talking about developing a “Jollywood” – a Jamaican film brand.

There is good reason why many would like to see such a development: Film and television is a major industry globally. A study of the economic contribution of the film and television industry in Australia shows that: “The total value added contribution of the sector is about \$6 billion and 49,000 FTE workers. This contribution considers key economic variables such as employment and value added contributed by the industry.”¹

1 http://www.screenassociation.com.au/uploads/reports/AE_report_AUG.pdf
Downloaded October 19, 2013.

In the USA, “in 2011, the motion picture and television industry supported nearly 2 million jobs and \$104 billion in wages.”¹ India, which has world’s largest film and television industry, produces on average 800 films annually compared to roughly 400 for Hollywood.² A 2010 study of the Indian film and television industry points out that it contributed approximately \$US6.2 billion to the economy.³

Studies of the Nigerian film industry are equally positive in terms of its developmental impact on that country. Nigeria produces approximately 2,500 movies per annum, varying significantly in length and quality.

According to *Ventures Africa*,

Nollywood... ranked third in revenue generation globally, behind US’ Hollywood and India’s Bollywood, respectively, despite challenges undermining its true potential.

In a *Business Day* report, Nigerian Export-Import Bank (NEXIM) MD, Robert Orya was reported to have said Nollywood generated close to 126.4 billion naira (US\$800 million) revenue within 2010 till date.

According to the report, the global film and entertainment industry generated about 14.3 trillion naira (US\$90.6 billion) revenue in 2010 which is expected to increase to 16.2 trillion naira (US\$102.7 billion) in 2012.⁴

The people who work in this industry have a range of jobs – for example graphic artists, software engineers, choreographers, make-up artists, writers, videographers, accountants, lawyers, actors, and the list goes on. If we add to the employment potential the growing phenomenon of film and movie tourism, the prospects of the industry for impacting on economic

- 1 http://www.huffingtonpost.com/chris-dodd/film-and-television-play_b_3644507.html Downloaded October 19, 2013.
- 2 <http://www.ventures-africa.com/2012/10/nigerias-movie-industry-becomes-third-richest-globally/> Downloaded October 19, 2013.
- 3 <http://www.indiaglitz.com/channels/hindi/article/55508.html> Downloaded October 19, 2013.
- 4 <http://www.ventures-africa.com/2012/10/nigerias-movie-industry-becomes-third-richest-globally/> Downloaded October 19, 2013.

development are even greater. New Zealand, London, Los Angeles, New York and Paris are among some of the most popular movie tourism destinations in the world. Some countries offer tours based on the fact that they were movie locations. Examples include:

- Tunisia: *Star Wars* Tours
- New York City: “Sex and the City” Tours
- England and Scotland: *Harry Potter* Tours
- Salzburg, Austria: *Sound of Music* Tours
- London: James Bond Tours

There can be no doubt that the film industry offers many positive economic possibilities for countries that are willing to invest in infrastructure and human resources and to provide incentives to grow the industry. It is also for this reason that we at *IDEAZ* felt that it was a good idea to have a special issue on this topic. This special volume of *IDEAZ*, *Leveraging the Film Industry for Development*, is dedicated to the burgeoning film industry in Jamaica. The papers by Diaram Ramjeesingh and Gillian Wilkinson-McDaniel – one an academic, the other a policy maker – were presented at a symposium organized by the Centre for Tourism and Policy Research (CTPR) at The University of the West Indies (UWI), Mona, Jamaica on June 20, 2013. The symposium was part of the Greater August Town Film Festival (a project of the CTPR), which was held around the same time. The papers examine a number of important findings and policy dimensions relating to the global and Jamaican film industry.

This volume of *IDEAZ* was supported by the Grace Kennedy Foundation, Carlton Alexander Chair in Management Studies and the Office of the Principal, UWI, Mona.



The Jamaican Film Industry: *Quo Vadis?*

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THE creative industries /economy cover a range of economic activities which are related to knowledge and information. The scope of activities usually range from architecture and craft to the performing arts, music and film-making (Hawkins 2001). According to a UN report (2011) the creative industries have the potential to stimulate and boost economic growth in developing countries. This articulation was supported by the fact that even as world commerce declined by 12% in 2008, global trade in services and creative goods increased by some 14%. More specifically, the export of creative goods from developing countries represented some 43% of their goods exports (Jessop 2013).

Over the past decade academic research on issues pertaining to the film industry has increased dramatically. This is partly due to the fact that the industry has a high economic value to the global economy, i.e. US\$11b in international ticket sales, and partly because it is a driver of the markets for other entertainment products.

In the case of the Jamaican economy the creative industries, in 2005, contributed J\$29b or 4.8% of the country's GDP while in 2007 it trended upward to 5.1% (James 2008).

The Jamaican film industry which is sometimes described as the quiet giant of the creative industries, is comprised of a disparate groups of independent film and video producers with



no established studio or distribution network. Nonetheless, it is recognized that if the industry is properly organized and developed it has the potential to emerge as an important component of the creative economy with the potential to generate significant inflows of foreign exchange and to create high skilled jobs. In 2003, this industry earned US\$14.3m from a range of film assignments and has managed over the last few years to generate, on average, between 1,500 and 2,500 part-time jobs annually (JAMPRO 2013).

The primary focus of this paper is the Jamaican film industry, which will be examined under four broad headings: Jamaican films, foreign films shot in Jamaica, film industry incentives, and film and tourism.

JAMAICAN FILMS

The development of a motion picture is a unique process that involves creative decisions with broad economic implications. It usually begins with a story line which may or may not be true or may vaguely resemble the truth (Vogel 2001). Although the story line for all practical purpose makes the movie/film unique, a predetermined set of criteria are used, however, to establish the origin of production and not the story line. For example, a film is designated as a British production if one of the following criteria is present (British Film Commission 2013):

- it satisfies the UK cultural test
- it falls within the ambit of UK bilateral coproduction treaties
- it falls within the scope of the European Convention on Cinematographic Coproduction

For this reason it probably would be instructive at the very outset to distinguish between a Jamaican and a non-Jamaican film production. Basically, a film is designated a Jamaican production if it is *produced* or *directed* by a Jamaican national,

or if *at least* 50% of the funding needed to produce the film is sourced locally (Jamaica Film Commission 2013).

This approach allows for the identification and separation of movies which may carry a Jamaican story line but are foreign productions. For example, *Cool Runnings* does carry a Jamaican story line but is a foreign produced film. Based on this methodology a listing of the Jamaican films produced between 1972 and 2012 is displayed in Table 1.

It is evident that domestic film production had its beginnings in 1972 with the shooting of the feature film *The Harder They Come*. Between 1972 and 2012 a total of 39 Jamaican feature films were produced thus averaging less than one release per year. As is normally expected with a young emerging industry, the pace of production in the early years was overly slow with only 11 films produced during the first two decades (1972–1991) of its historical evolution.

Table 1. Jamaican Films Produced Between 1972 and 2012

Year	Film	Year	Film
1972	<i>The Harder They Come</i>	2003	<i>Etu & Nago</i>
1976	<i>Smile Orange</i>	2003	<i>One Love</i>
1978	<i>Rockers</i>	2003	<i>Roaring Lion</i>
1979	<i>Reggae Sunsplash</i>	2003	<i>Rude Boy: The Jamaican Don</i>
1980	<i>Children of Babylon</i>	2005	<i>Runt</i>
1981	<i>Bongo Man</i>	2006	<i>Glory to Gloriana</i>
1982	<i>Country Man</i>	2006	<i>It's All About Dancing: A Jamaican Dance-U-Mentary</i>
1982	<i>Deep Roots Music</i> (TV series)	2006	<i>No Place Like Home</i>
1982	<i>Land of Look Behind</i>	2006	<i>Roots Time</i>
1988	<i>Milk and Honey</i>	2007	<i>Bashment: The Fork in the Road</i>
1991	<i>Lunatic, The</i>	2007	<i>Black Kissinger</i>
1997	<i>Dancehall Queen</i>	2007	<i>Shottas for Life</i>

1997	<i>Reggae Rump Bump Party</i>	2008	<i>Made in Jamaica</i>
1998	<i>Belly</i>	2010	<i>Better Mus Come</i> (feature film)
1998	<i>Third World Cop</i>	2011	<i>Bubblin'</i>
2001	<i>Life and Debt</i>	2011	<i>Concrete Jungle–Kingston 12</i> (feature film)
2002	<i>Brucio nel Vento</i>	2011	<i>Ghett'A Life</i>
2002	<i>Shottas</i>	2011	<i>Hated 2 Death</i>
2002	<i>The Studio One Story</i>	2011	<i>Out the Gate</i>
		2012	<i>Her Spirit Was for Dancing</i>

However, the pace quickened somewhat over the last two decades, 1992–2012, when 28 of the 29 films were released.

Several surveys were conducted in recent years to gauge the public's perception of the best Jamaican film ever produced. Based on two factors, popularity and market penetration, the study by Murphy (2011) identified the following as the top Jamaican movies of all time:

- *The Harder They Come*
- *Smile Orange*
- *Rockers*
- *Countryman*
- *Third World Cop*
- *Dancehall Queen*
- *Shottas*
- *Better Must Come*

Another survey using a different set of criteria, such as the popularity of each movie on the web, in pictures, on the news and people's votes, listed the following as the top Jamaican movies (www.mytopdozen.com 2013):

- *The Harder They Come*
- *Rockers*
- *Third World Cop*
- *One Love*

- *Dancehall Queen*
- *Reggae Sunsplash*
- *Life And Debt*
- *No Place Like Home*
- *Countryman*
- *Rude Boy: The Jamaican Don*

It has long been recognized that the production and release of a film encompasses several revenue streams inclusive of domestic and foreign theatrical screenings, videos, network television, merchandizing, etc. Unfortunately, no comprehensive data exist on the revenue inflows from each of these potential windows. The only recourse is to use anecdotal evidence to provide some indication of the revenue potential of Jamaican produced films.

According to a survey undertaken by Palace Amusement (2012), it was found that of the top ten grossing films screened in Jamaica – inclusive of foreign production – *Third World Cop* and *Dance Hall Queen* occupied the second and third positions, respectively. In fact, *Third World Cop* has broken local box office records with an earning of J\$21m. This sum did not include money earned from the screening of the movie outside of Jamaica.

There is little doubt that the Jamaican film industry has a long and rich legacy but surprisingly it has remained fairly small. This is due partly to the inaccessibility of funding to domestic film producers as well as the absence of requisite production facilities, and partly to the fact that the language in Jamaican produced films is not understood by English speaking non Jamaicans. If the industry is to grow beyond the current Diaspora market, then there is need for decision makers and film producers to not only recognize the existence of these problems but to engage in corrective actions that seek to address these major obstacles in an effort to promote the growth of the industry.

FOREIGN FILMS SHOT ON LOCATION – JAMAICA

Jamaica's natural beauty has been a pull factor for foreign film producers. The country's versatile and varied landscape provides a range of filming options to film-makers. Jamaica was first used as a location in 1953 when the feature film *All the Brothers Were Valiant* was shot (see Table II). Between 1953 and 2002 a total of 39 foreign feature films were shot in this jurisdiction either as a primary or secondary location. On average the destination has been used as a location by foreign film producers to shoot just about less than one feature movie per year.

Table II. Feature Films Shot in Jamaica Between 1953 and 2002

Year	Film	Year	Film
1953	<i>All The Brothers Were Valiant</i>	1988	<i>Passion of Paradise</i>
1954	<i>Twenty Thousand Leagues Under the Sea</i>	1989	<i>Popcorn</i>
1957	<i>Island in the Sun</i>	1989	<i>Treasure Island</i>
1958	<i>Passionate Summer</i>	1989	<i>Goldeneye</i>
1962	<i>Dr. No</i>	1990	<i>Sankofa</i>
1965	<i>A High Wind in Jamaica</i>	1990	<i>Marked for Death</i>
1967	<i>In Like Flint</i>	1990	<i>Lunatic, The</i>
1968	<i>The Mercenaries -The Dark of the Sun</i>	1991	<i>Wide Sargasso Sea</i>
1981	<i>Eureka</i>	1991	<i>Prelude to a Kiss</i>
1984	<i>Countryman</i>	1992	<i>Going To Extremes</i>
1985	<i>In Like Flynn</i>	1992	<i>Scam</i>
1985	<i>Club Paradise</i>	1993	<i>Legends of The Fall</i>
1985	<i>Return to Treasure Island</i>	1993	<i>Cool Runnings</i>
1985	<i>Otto</i>	1994	<i>Clash</i>
1987	<i>Milk and Honey</i>	1995	<i>The House Next Door</i>
1987	<i>Cocktail</i>	1997	<i>The Man Who Knew Too Little</i>

1987	<i>Clara's Heart</i>	1997	<i>Shattered Images</i>
1988	<i>The Mighty Quinn</i>	1998	<i>How Stella Got Her Groove Back</i>
1988	<i>Lord of the Flies</i>	1998	<i>Instinct</i>
1988	<i>Hammerhead</i>	1998	<i>Belly</i>
		2002	<i>Shottas</i>

The low utilization rate of Jamaica as a location is not surprising because the country faces intense competition with other jurisdictions. To understand and appreciate the immense nature of the challenge confronting Jamaica as a location, the paper lists the top ten film locations around the world and their alluring attributes:

- *Vancouver*: usually dubbed the Hollywood of the north, offers some of Canada's best mountain sceneries, beaches and forest.
- *North Carolina*: endowed with lush forest and modern architecture and a generous tax incentives programme.
- *Thailand*: renowned for its powder soft sand and turquoise waters and green clad rocks that rise magnificently from the sea. It is used by both Hollywood and Bollywood.
- *Kauai, Hawaii*: seen as a Hollywood tropical paradise and known as a shape shifter because it doubles as Australia, Central and South America, Africa, South East Asia and South Pacific.
- *New Zealand*: consisting of mountain ranges that dominate the New Zealand landscape. In addition, there are fords, glaciers, lakes and coastal plains with miles of coastline with incredible beaches.
- *London*: home to beautiful architecture, history, eclectic neighbourhoods, Buckingham Palace, Piccadilly Circus and Notting Hill.
- *New York*: a glittering city that has emerged as a hub for

films and television shows.

- *Prague, Czech Republic*: a quintessential city that is stately and atmospheric and home of the Estate Theatre where Mozart conducted the premiere of his opera *Don Giovanni*. It is considered as one of the most beautiful cities in the world. It is listed among the UNESCO World Heritage Cultural Sites, and for lovers of historical monuments it is a virtual paradise.
- *Argentina*: a country that offers a world of location look alikes which include modern cities and old European architecture, coastal towns, fantastic towns and bridges, the natural majesty of Patagonia plains, valleys, rivers, deserts, jungles and waterfalls.
- *Spain*: the dingy streets of Barri Gotic is the dream of many film producers because it has gothic gloom/splendour. Spain is also the home of Almería which is dubbed “Mini Hollywood”. It is unique, beautiful and it has the only desert in Europe (Nathan 2012).

The above list does not include countries like India, Switzerland, Russia, Australia, Brazil, Indonesia and France which are also major players and do attract major foreign studios on a frequent basis.

Broadly speaking there are three elements that influence the choice of a location: 1) technical requirements, such as space, facilities, amenities, adequate parking and lighting; 2) the aesthetic quality of the location, which includes scenery and accessibility; and 3) the incentives being offered.

FILM INDUSTRY INCENTIVES

The Jamaican Motion Picture Industry (Encouragement) Act was first introduced in 1948 and was subsequently amended in 1991. In an effort to be competitive, the Government of Jamaica revamped the old schedule and included a new set

of incentives – most of which are similar to those offered by many jurisdictions in the United States and elsewhere. It was anticipated that this new set of offerings will promote and stimulate the growth and development of the industry. The main incentives offered to the industry were:

- Tax-free profits from overseas release of film and video for nine years
- Duty-free and tax-free concessions on equipment, machinery and materials for the building of studios and support facilities
- An investment allowance of 70% of sums spent on investment in infrastructure... with a carry-forward of the unused portion.
- No withholding tax on dividends paid to resident shareholders with investments in film companies. Non-resident shareholders earn dividends taxed according to the provisions of the Double Taxation Treaty with their respective countries (for example, the USA and UK are treaty members), thus eliminating the payment of taxes in Jamaica)
- General Consumption Tax (GCT) rebate of 16.5% for films on all goods and services purchased in Jamaica determined on a project by project basis
- Discount on government owned locations
- Benefits under existing coproduction treaties (in 2007, Jamaica signed a coproduction treaty with United Kingdom that would give access to other countries that previously signed similar treaties)
- Waiver of duty on temporary importation for the creative industries
- General consumption tax zero rated for film and video production for export

(<http://www.filmjamaica.com/incentives>)

Although the range of incentives seems to be similar to those available in many other nation states, it is silent on one perennial challenge that typically confronts domestic film-makers, particularly in developing countries: This has to do with the availability and accessibility of funds at low interest rates for film projects. Governments in two of the major film producing nations, India and Nigeria, had to address this problem by setting up preferential loan facilities. If the domestic industry is to expand rapidly then the government has to address this issue promptly.

FILM AND TOURISM

The act of travelling to a destination featured in a movie has emerged as a new source of revenue for the tourism industry. This new phenomenon, often described as “film induced tourism” has passed the stage of a rising fad and is now seen as an important component of the global tourism industry. A blockbuster may influence some of its viewers to travel to the destination where it was filmed. If a tourism product is developed around the location(s) of a popular movie and is effectively marketed, it can become a major drawing card for those tourists who may develop an interest in the location/country. According to Bolan (2012) there are three distinct types of film induced tourists:

- the scenic/visual tourist who is influenced by what is seen, and is attracted to the location and landscape
- the emotional/nostalgic tourist who is inspired by the storyline and characters in the film and is driven to seek out the filmsetting that is interwoven with the story.
- the pure film tourist who is enthused by most or every facet of the film and is aroused to the point that he/she needs to visit the actual location and filmsetting.

Film induced tourism may be quite enduring because it helps

to promote and improve the image of a country – which, in essence, may have not only an expanding but also a long term impact on the nation's tourism industry (Chang-Wook 2007).

There is little doubt that films tend to leverage the visibility of a country and boost its tourism potential. For example, *Out of Africa* was said to be the film that lured American tourists back to the African continent. *Crocodile Dundee* had the distinction of enticing tourists to visit the Australian outback, while the movie *Lord of the Rings* pushed tourist arrivals in New Zealand over the 2 million mark (Chang-Wook 2007).

Unfortunately, thus far the relevant authorities have failed to exploit/capitalize on the opportunities that film induced tourism has to offer to the Jamaican industry. Films like *Dr. No* (1962), *A High Wind in Jamaica* (1965), *The Blue Lagoon* (1980), *Return to Treasure Island* (1985), *Cocktail* (1988), *Lord of the Flies* (1990), *Wide Sargasso Sea* (1993), *Legend of the Fall* (1993) and many others could have been used as a marketing medium to sell Jamaica as a tourist destination.

To facilitate this process it would be necessary to initiate marketing activities both before and after a film is released. The range of activities will have to go beyond the traditional advertising exercise and must include familiarization tours and joint activities with travel agents and the film industry (Hudson & Ritchie 2006). In addition, the tourism organization has to prepare materials in advance of a film's release and generate publicity around the film itself or around the main actors in the film (Ward 2001). This would require a high level of support and cooperation among the relevant players in the film and tourism Industries, as well as government related agencies.

CONCLUSION

The current policy direction being pursued by the Jamaican Government in an effort to promote and develop the film industry is somewhat disconcerting. It is apparent that greater weight is being placed on selling Jamaica as a location

destination to foreign film producers. If the primary focus is to sell Jamaica as a location, then, to say the least, the industry faces intense competition as Jamaica is not ranked among the top locations in the world.

Most countries, including India, Nigeria, China, among others, started out by focusing on the development of a vibrant domestic film industry. This was only possible through the establishment of adequate production facilities and various structures needed for the development of the industry. Also, special training programmes were put in place at the tertiary and vocational levels so that individuals could acquire or enhance skills relevant to the industry.

The Jamaican Government needs to follow best practices with respect to the film industry across the world if a vibrant film sector is to emerge locally.

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Opportunities for Film Induced Tourism in Jamaica

Gillian Wilkinson-McDaniel

Snr. Director, Entertainment
Ministry of Tourism and Entertainment, Jamaica

I Am honoured to represent the Minister of Tourism and Entertainment, Honourable Dr. Wykeham McNeill, on whose behalf I am offering these remarks.

First of all let me offer my congratulations to the Center for Tourism and Policy Research for staging this fourth annual tourism symposium. I feel confident that the vast majority of our audience and participants today will agree with me that there are tremendous returns that the pairing of tourism and entertainment have to offer our economy. To therefore focus this year's tourism symposium on exploring the synergies towards building a national strategic approach is commendable and a step in the right direction.

I am even more impressed by the outreach efforts of the Center for Tourism and Policy Research into the Greater August Town community and the resultant Greater August Town Film Festival or GATFEST. Engaging these twenty-five or so youth community members in the film-making process is an excellent means of activating latent creativity, providing our youth with much needed skills training while allowing them the opportunity to build confidence and self-esteem.

The entertainment portfolio under the Ministry of Tourism and Entertainment embraces a wide spectrum of the creative industries from music, film and fashion to the fine arts and the performing and literary arts. Jamaicans, we all know, are not

short of talent and creativity in any of these areas and in fact are so naturally gifted with creativity that the entertainment and creative sectors are seen by many as an easy and natural choice in eking out a living. However, given the insatiable global demand for all things Jamaican, we must ensure that talented Jamaicans do more than just eke out a living.

The importance then of a symposium such as this is not lost to those of us charged with developing the sector to maximize its contribution to the social and economic growth of our nation. “Film Induced Tourism: Turning Dreams into Reality” is an exploration of the synergies and compatibility of tourism with one element of the creative industries, film-making. Sue Beeton in the introduction to her book *Film Induced Tourism* (2005: 1) writes:

Global and local events from terrorism through to disease, epidemics and political uncertainty impact communities around the world in ways that have not always been foreseen. Changes have been felt socially as well as economically as the ground shifts beneath once stable, predictable societies. Tourism, while being a victim of all these events, has a major role to play in community reconstruction. Popular media also plays a major role... particularly the medium of film.

Recent media reports have shown students lamenting the lack of impact that tourism has had on their communities. Yet the Tourism Enhancement Fund has been called on to fund everything from streetlights to community festivals. If we dig a bit deeper we will see that tourism has not necessarily embraced the natural synergies that exist between it and other sectors, and in this case I’ll speak specifically to film. The Film Commission at JAMPRO reported that between March 2012 and April 2013 the Commission facilitated almost 100 film productions (and here I’m defining film as television productions, music videos, magazine still shoots, documentaries) with 51% being filmed in Kingston; 33% on the north coast, namely St. Ann, Ocho Rios and Montego Bay; 11% in Negril and Portland (*Jamaica Gleaner*

News Online, <http://jamaica-gleaner.com>, 28 November 2013). Jamaica has always been marketed as a location and in fact one of the first films done outside of Hollywood – *A Daughter of the Gods* – was done right here in Kingston, Jamaica in 1916. Kingston, host to 51% of the almost 100 film crews coming to Jamaica, has been marketed as “the heartbeat of Jamaica” and as “Kingston the creative capital of the Caribbean” or a “creative city”. After the release of the film *Slumdog Millionaire*, visitors to Mumbai increased by 25%. I’ll note as a sidebar that one interesting phenomenon we observed after the ‘Dudus affair’ was that filming in Kingston rose by more than 15%.

Despite all this, Windward Road, King Street, and Port Royal have never been billed as the place where Bond’s *Dr. No*, Drake’s “Find Your Love” music video or, for that matter, Chris Browne’s *Ghett’A Life* was filmed.

Another interesting market segment is sports related filming, linked most notably around Usain Bolt where Kingston is often the location of choice. Let me give you an example. In 2011–2012 film crews spent approximately 30 film days in Jamaica on sports related filming in Kingston and its environs. This presented a tremendous opportunity for communities and locations to capitalize on the allure of sports and Jamaica’s sporting prowess. If as Ramjeesingh argues, “Films have the benefit of being able to demonstrate the features of a destination,” then we in tourism and you as communities, should be doing more to utilize locations such as Dunn’s River Falls, Frenchman’s Cove, Blue Lagoon, Green Grotto Caves (*Live and Let Die*), Laughing Waters, the former Swamp Safari in Salt Marsh and Dragon Bay in Portland which are featured in films such as *Cocktail* (1988) and *Knight & Day* (2010) starring Tom Cruise, *Instinct* starring Anthony Hopkins as well as the three Bond films shot on island – *Dr. No* (1962), *Live and Let Die* (1973) and *Goldeneye* (1995). Not to mention the ordinary streets and cityscapes – Coronation market, Papine market, Tropical Plaza, just to name a few.

If we were to benchmark against other film destinations we would look at London that is said to be one of the most

cinematic cities in the world. **Film London** (2012) states that 1 in 10 (of the 15 million overseas tourists, 10 million domestic visitors and 150 million day trippers) are attracted to the city by films depicting the city, spending about £1.9 billion a year. Bond and Harry Potter are major brands that have sparked a boom in tourism, as have television programmes such *Balamory* and *Monarch of the Glen*. (I will not belabour the point that three Bond films were shot in Jamaica.)

We would also look at New Zealand with the release of the *Lord of the Rings*, Scotland with the release of *Braveheart* – just to name a couple. This brings us to the question: How are we as the Ministry of Tourism & Entertainment utilizing film induced tourism as a focal point for economic and social regeneration? In some simple but important ways the Ministry of Tourism through the Entertainment Advisory Board has been working collaboratively with the Film Commission to educate our colleagues on the marketing and promotion of tourism through the lens of film.

Our Ministry has also been working on an initiative called **Reggae Month | it's Kingston for February**, which seeks to market and promote Kingston as a location for tourists to visit and enjoy as a creative city producing a diverse urban vibe. Finally, we will be submitting to Cabinet in short order a Community Tourism policy. Nevertheless, work will still need to be done by communities to facilitate and ready themselves to take advantage of the community tourism opportunities that will be presented.

Film induced tourism has at its core the power to influence the audience through response and motivation – as seen with *Sleepless in Seattle* (1993) and *Breakfast at Tiffany's* (1961); through the power of the celebrity – e.g. Elvis Presley, or even our very own Jimmy Cliff in perhaps his most memorable role *The Harder They Come* (1992). Memorable films can become powerful conveyors of national identity, as seen with the Aussie classic *Crocodile Dundee* (1986), and *Cool Runnings* (1993) shot partly in Jamaica. The linkages and opportunities are numerous. Film induced tourism can strengthen the image, brand and

marketing thrust of a country as seen in New Zealand, a country that has positioned itself to benefit from the success of the *Lord of the Ring* trilogy and the recently released film *The Hobbit: An Unexpected Journey* (2012). The government launched the **100% Middle-earth, 100% Pure New Zealand** campaign, which has been particularly strong in America. In the first 3 months of the year, 8.5 per cent of visitors to New Zealand said that *The Hobbit* was a factor in choosing to go there. Those 8.5 per cent of visitors spent around \$US153 million. Jamaica too can develop film tourism linkages to capitalize on these opportunities.

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Film Tourism: A Global Perspective

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PUBLISHED data by IBISWorld show that the global film industry in 2012 generated some US\$87b in revenue while at the same time it was responsible for the creation of approximately 853,000 direct jobs. The top three producers of feature films were India, Nigeria and the United States of America.

Results from a UNESCO survey (UNESCOPRESS 2009) clearly show that India, primarily through its Mumbai based Bollywood studio, with some 1,091 feature length films was the global leader in movie production in 2009. Nigerian movie-makers, principally from their Nollywood studio, were second – producing some 872 feature films mostly in video format, while the United States came in at a distant third with 485 major films. These three film-making giants were followed by Japan with 417, China, 330 and France, 203.

Supported by the use of new technologies and a booming economy, the Indian industry earned approximately US\$3.3b in revenue at the end of 2010 while the average cost of producing a film was in the region of US\$1.3m (Bollywoodcountry.com 2013). There is a vast chasm between the revenue earnings and production costs of Bollywood and Hollywood films. For the same year Hollywood revenue stood at US\$51b, which was fifteen times higher than Bollywood's earnings; production costs, however, were ten times more, averaging



about US\$13.6m per film (Bollywoodcountry.com 2013). Nollywood, on the other hand, over the last fifteen years grew from a zero based revenue entity into a US\$250m a year industry. It takes an average of ten days to shoot a film, with an estimated mean cost of US\$125,000 per film.

In stark contrast, between 1972 and 2012 some 39 feature films were produced in Jamaica. The industry at best could be described as fledging as published data on the industry performance support this articulation. In 2003 earned revenue was approximately US\$14.3m from the production of several film projects and music videos, while concomitantly some 1,500–2,500 part-time jobs were created (Ministry of Industry, Investment and Commerce 2012).

Interestingly enough, each of these countries has developed and sustained over the years a relatively large tourism industry. The smallest among the three is Nigeria's – with tourist arrivals moving from 611,000 in 1997 to 1.4m in 2009 (WTO 2010), representing an average growth of approximately 11% per annum. Tourist arrivals in India in 2009 stood at 5.17m while during the 2009/10 fiscal year the industry registered a growth of 24.6% (Invest India 2012). The USA, on the other hand, had attracted some 64m arrivals in 2011, while the industry is projected to grow between 6 and 8% over the next five years (Department of Commerce 2011).

It is a truism that films are not necessarily produced with the objective of inducing tourist visitation. It is widely accepted by now that feature films when viewed by large audiences can and do enhance interest in the destination where the film was shot and can entice viewers to visit (Macionis 1992). This gave rise to the concept of film induced tourism which is a new and fast growing component of tourism (Beeton 2005). Due to the difficulties inherent in the measurement process, there is currently a paucity of estimates with regard to the actual contribution of film tourism to the global or national economies. A study undertaken by Oxford Economics (2010) put the value of UK films to tourism in 2009 at £1.9b, which

represented some 12% of the country's international tourism receipts.

An important driver of film induced tourism is the 'tourist gaze' which evolves from one's imagination, promotional story lines of the tourism industry, cultural stereotypes and expectations (Urry 1990). As Urry argues, locations are chosen to be gazed upon because of anticipation which is influenced by daydreaming and fantasy. This kind of anticipation is generated and sustained through non tourism media such as film and television, which not only help to construct but also serve to reinforce that gaze. Hence the development of the concept of film induced tourism.

The central theme of the paper is to explore the relationship between the production of feature films at a destination country and tourism. In essence, can film drive the growth of tourism?

The paper begins with a brief examination of the role and type of incentives the three leading film producing countries offer to their Industries. It continues by discussing the phenomenon of film induced tourism and then goes on to discuss the push and pull factors of a film tourist. Prior to the conclusion, a brief analysis is presented of the actual impact on tourist arrivals for several countries that had used film induced tourism as one of the pillars of their tourism strategy.

AN OVERVIEW OF THE FILM INDUSTRY

India: Bollywood

In 2008 the approximate size of the Indian film industry was put at US\$2.5b in gross output (total revenue) with a direct contribution of US\$645m to the economy – some US\$176m of which was in the form of net indirect taxes and the remaining US\$469 was direct value-added contribution to GDP (Box Office India 2010). Projections by Box Office India (2010) suggest that the industry should grow at a compound annual rate of 11.5% over the period 2008–2013.

At a broader level, the output of India's media and

entertainment industry was estimated at US\$16.6b in 2010 (Shackleton 2012). For the fiscal year 2008/09 the entertainment tax paid by the film Industry amounted to US\$222m, which represented some 80-90% of the total entertainment tax collected by the government. Not included in the entertainment tax schedule are two other taxation items. The first is the state value-added tax (VAT), varying from 4 to 15 per cent and the second, in addition to the payment of normal income tax, actors are charged a 12.36% service tax on earnings from films, TV shows and endorsements.

Film producers in India have come to rely on a variety of sources for film financing: These include:

- personal funding
- advances from distributors and financiers
- sale of film/ music rights
- bank financing; venture capital investment
- stock market/ corporate sponsors, and
- joint production

The high incidence of taxation and the absence of any defined benefits to the domestic film industry has forced many of the studios to increasingly turn their attention to other countries with a view to exploit some of the attractive benefits being offered to film production. This process was facilitated through the signing of coproduction treaties by the Indian government with several foreign countries (Price-Waterhouse 2012).

Many of the Indian film producers, for example, stand to benefit significantly from the treaty with the UK government. This must be seen against the background that in 2005 there were not only a record number of Bollywood feature films released in the UK but there were some 2.6m visits to **hindi film** in the UK (Shackleton 2012).

Because of the treaty UK-India coproduction films are allowed to bypass the stringent UK “cultural test” to receive national status designation, which then qualifies them to

access UK tax relief which is one of the most generous and competitive worldwide. One of the major benefits is that films costing 20 million pounds or less are entitled to an additional tax deduction of 100% of UK qualifying spending, and in the event of losses can receive cash payments of at least 20% of UK qualifying production costs (Lee 2008). In contrast, British films received an additional 80% of qualifying UK expenditure and can surrender losses typically worth 16% of qualifying production costs.

With the rising trend of Bollywood film-makers exploiting the UK tax benefits, the Indian government has been exploring different financing models for the local film industry. In addition to giving recognition to the film industry as an approved economic activity so that film-makers can access loans under the Industrial Development Act of 1964, the government through the Reserve Bank of India has set out guidelines under which commercial banks can invest in the production of films. To date the Industrial Development Bank of India has extended some US\$21m to 41 producers of films.

Nigeria: Nollywood

The critical factor to Nollywood's success is the almost exclusive reliance on video production instead of film. This focus was largely influenced by the virtual absence of any formal cinema setting as some 99% of film screenings are done through home theatres. The industry has a fairly successful export market which is influenced by the fact that approximately 44% of films are shot in the English language and that there is a large diaspora market.

In very broad terms the cost of a Nollywood film usually ranged between US\$40,000 and US\$210,000 to produce and on average about 120,000 copies are sold on the domestic market (Benibo 2008).

Due to the explosive growth of the industry, the government took the decision to promote the industry by ensuring that it functions in an investment friendly tax environment. The

industry currently is granted:

- Investment tax credit
- deduction of the portion of profit put aside for research and development
- tax exemption on repatriated income earned overseas by playwrights, artistes and musicians
- company tax of 20% for small business
- low tax concession rate of 7.5% for foreign investors
- accelerated capital allowance

More recently a technical committee has recommended that the following incentives be included in the tax schedule as well:

- an exemption of 20% of the income of film-makers to be used solely for the acquisition of film equipments
- rebate of import duties on film equipments and materials imported by local and foreign film production companies
- preferential loan facilities available to investors seeking to aid development in the film sector
- imported audiovisual equipments to be exempted from VAT

(KPMG 2012; *Vanguard* 2013)

Based on the tax incentives outlined, it is quite obvious that the film sector is an investor's dream. Interestingly enough because of the perceived interconnection between the film industry and tourism, the Nigerian government has extended similar incentives to the tourist industry.

United States: Hollywood

Today, there are six major studios that operate in and around Hollywood. These are:

- Paramount Pictures
- Warner Brothers

- Columbia Pictures
- Walt Disney
- Universal Pictures
- 20th Century Fox

The studios in the main are financiers and distributors of feature films produced largely by independent companies. Currently they command approximately 90% of the US and Canadian box office market. Although these studios are placed behind Bollywood and Nollywood in terms of the number of films produced, their earned revenue is the highest among studios worldwide (Bollywoodcountry.com 2013). In 2011 the major Hollywood studios generated revenue of US\$13.6b compared to US\$12.7b in 2010, representing approximately a 7.1% increase. Between 1995 and 2012 the top three distributors were Warner Bros. Walt Disney and Sony Pictures with gross revenues of US\$24.2b, US\$21.8b and US\$20.7b, respectively (Nash Information Services 2013).

It has long been recognized in the US that film production provides both long and short term benefits, such as an increase in tourist arrivals and the creation of local jobs. By and large, the states have been offering increasingly competitive incentives, but the amount and type tend to vary from state to state. The process of providing state incentives to film production began in Louisiana in 1991. The apparent success of the Louisiana incentives programme strongly influenced other states to develop and offer their own incentive packages. Today some 44 states offer their own set of incentives to the film production segment of the industry. The structure and type of each package would vary but include some combination of the following incentives:

- Tax credit: this serves to lower the amount of income tax the production company has to pay. In some states the tax credit is transferable to other companies or refundable if the company tax liability is less than its credit.

- Cash rebates: a percentage of a company's qualified expenses is refunded by the state.
- Grants: given by three states and the District of Columbia
- Sales tax and lodging exemption: many states offer exemption from lodging tax for guests who stay over 30 days
- State free location: many states allow the use of state owned location free of charge

It was observed that over the years the main benefits of these incentives were that they generated employment, increased tourism and generated higher incomes at the state level. But as the economic crisis loomed, state legislators began to question the efficacy of film credits as opposed to other types of developmental programmes that sought to increase the economic activities of the private sector (Ernst and Young 2012).

THE PHENOMENON OF FILM INDUCED TOURISM

At this juncture it is important to distinguish between the concept of "movie induced tourism" and that of "film induced tourism". In the literature the former is narrowly defined to include location tourism that is generated as a result of a successful movie being filmed in a particular area/region.

Many scholars, however, have shown a preference for the use of the concept "film induced tourism" because it is much broader or more inclusive. According to Beeton (2005), the term "film induced tourism" applies to "visitation sites" where movie and TV programmes are produced and where tours of production studios and film related theme parks are conducted. In essence this articulation speaks to the tourist activity associated with the film industry.

As argued by Macionis (2004) it is possible to distinguish three types of film tourists. The first speaks to a specific film tourist who seeks out locations that are seen in a film;

the second is the general tourist who is not drawn to a film location per se but participates in film tourism activities; while the third is the serendipitous tourist who just happens to be at a destination portrayed in a film.

Di Cesare and Reich argue that the starting point of film tourism is when a member of an audience is intrigued by an image or a series of images that describes a place or places and is fascinated to the point where he or she may want to visit. In essence, a film plays the role of a promotional brochure or a television advertisement. Beeton (2005) points out that film induced tourists come in many diverse forms, for example:

- it may be the main reason for travelling
- it may be part of a holiday package
- it may be to pay homage to a film/ location
- it may be to visit a celebrity home/ location
- it may be to visit a location that represents some time in the past (nostalgic film tourism)
- it may be to visit man-made sites (film attraction tourism)
- it may be to participate on location tours, or
- it may be to visit a studio/ theme park

Film induced tourism today is one of the fastest growing components of international tourism stimulated partly by the extraordinary growth in the entertainment industry and partly by the astounding growth in international travel (Hudson & Ritchie 2006).

The concept of film induced tourism is not new as many tourism authorities around the world have been using it to induce tourists to visit their respective destinations. Several studies have shown that the concept can and does help to attract tourists and boost tourism development (Tetly 1997; Hudson & Ritchie 2008).

PULL AND PUSH FACTORS OF A FILM TOURIST

To understand how the choice of a destination is made it is necessary to be familiar with the factors that influence such decision. In very broad terms the drivers of this type of decision making are described in the literature as the pull and push factors. Pull factors are the motives for wanting to visit a destination while the push factors refer to the needs and wants of a traveller which influence why he/she has the desire to travel (Dann 1981).

According to Gjorgievski and Trpkova the pull factor involves three critical attributes, which can have a major impact on a film tourist's decision to visit a particular destination. These are

- *Location*: where the movie is shot, that is whether it is a place or in a studio. In particular the film tourist may be influenced by the attributes of the location such as scenery, landscape, climate or culture.
- *Performance*: how the storyline of a movie incites the curiosity of a viewer who may have had a similar/parallel experience in real life and may want to use the performance as an escape hatch from the real world.
- *Personality*: A strong desire to visit the place where the famous actor did the scene.

With respect to the push factor, the film tourist may be motivated by the need to enhance his/her ego, status, fantasy or search for self identity (Macionis 2004). In short people travel because they are pushed by internal factors while at the same time they are pulled by external forces (Beeton 2005).

MAJOR BENEFITS OF FILM INDUCED TOURISM

There are many quantitative and qualitative benefits associated with film tourism. Some of the qualitative benefits include: the portrayal of a positive destination image; increasing the cultural value of the location/destination; the prospect of the storyline

adding some measure of specificity to and greater awareness of the destination (Busby & Klug 2001).

On the other hand, one of the major quantitative economic benefits that film induced tourism can bring to the country is an increase in visitor arrivals. Table I below lists the recorded increases in tourist arrivals at each location/ destination after the release of 14 films and TV series.

Film/TV Series	Location	Increases in Arrivals
<i>Braveheart</i>	Wallace Monument, Scotland	300% a year after film was released
<i>Captain Corelli's Mandolin</i>	Cephalonia, Greece	50% increase over 3 years
<i>Deliverance</i>	Rayburn County, Georgia	20,000 film tourists a year
<i>Dances With Wolves</i>	Fort Hayes, Kansas	25% increase
<i>Dallas</i>	Southfork Ranch, Dallas	500,000 visitors per year
<i>Little Women</i>	Orchard House, Massachusetts	65% increase year after release
<i>Mission Impossible II</i>	National Parks, Sydney	200% increase in 2000
<i>Harry Potter</i>	various locations, U.K	50% (or more) increase in all locations
<i>Crocodile Dundee</i>	Australia	20.5% increase in US visitors 1981-1988
<i>The Beach</i>	Thailand	22% increase in youth market in 2000
<i>To the Manor Born</i>	Leisure Park, UK	37% increase, 1978-1980
<i>Saving Private Ryan</i>	Normandy, France	40% increase in US tourists
<i>Troy</i>	Turkey	73% increase in tourism
<i>Gorillas in the Mist</i>	Rwanda	20% increase in arrivals in 1998

Source: Hudson and Ritchie (2006a)

A cursory examination of the above data would clearly suggest that there exists a close correlation between the release of a film and increased tourist arrival at a particular destination.

For this reason many destinations are actively encouraging film producers to engage in film production in their region so that the destination can benefit from this long-term tourism impact.

But, as Hudson and Ritchie (2005a) argue, this correlation presupposes that there is adequate destination marketing spearheaded by government through the national film commission. Failure to sufficiently promote the destination may not produce the desired results. Before embarking on any promotional exercise, however, due consideration must be given to the carrying capacity of the destination to accommodate the anticipated increase in the inflow of tourists and the possible adverse impact it would have on the environment (Tooke & Baker 1996).

CONCLUSION

Without a doubt film induced tourism has emerged over the years as an important component of world tourism. Many destinations have already formulated strategies to tap into this growing segment of the tourism market because this emerging post-modern tourism trend not only increases the cultural value of a location, but also serves to enhance the image and awareness of the destination.

As a word of caution, it is necessary to bear in mind that the success of a destination depends largely on the success of a film. To ensure that film-makers can and do produce films that are successful in the market place the destination needs to provide an enabling film production environment with appropriate and attractive incentives.

It should be obvious that film induced tourism offers destinations the opportunity to generate significant incremental increases in tourist visitations. The tendency to choose a destination based on sand, sea and sun is quickly being replaced by new forms of tourism, including film induced tourism.

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