

Royal Tour Film: Is Tanzania Prepared?

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ABSTRACT

Since independence in 1961, there have been efforts to promote the country's abundant tourism attractions and investment opportunities with little success. Of recent, Tanzania and rest of the world were severely hit by the COVID-19 pandemic. Tourism and foreign direct investment were some of the sectors which were badly affected. Tanzania the Royal Tour film, was among the sixth Government Regime's initiatives that aim to revitalize the tourism. However, the question is on the preparedness among the tourism players towards the anticipated effects of Tanzania the Royal Tour Film. The study employed both qualitative and quantitative methods, involving 117 tourism respondents who were conveniently drawn from over 1200 tourism stakeholders in the sub-sectors of accommodation (25), tour operators (32), tourism investors (18), tour guiding (32), and arts and crafts (10), among others. The data gathered were processed and analyzed qualitatively and quantitatively. Qualitatively, the researcher first translated and categorized them into various themes and sub-themes basing on the research objectives and research questions in both FGDs and in-depth interviews guides. Data from the in-depth interviews were transcribed and analyzed using thematic data analysis. Verbatim quotes were used to illustrate points of views during preparing this report. SPSS version 20 was used to analyse the quantitative data. This study reveals that there is inadequate awareness of the expected impact of the Royal Tour Film among the tourism players, leading to lack of preparedness for receiving, hosting and handling massive numbers of tourists in the country. The study also found that majority of tourism players face serious capacity issues, especially in managing large numbers of visitors, especially international tourists. Furthermore, it has been established that the majority of tourism players have little understanding of the legal and policy issues governing tourism and hospitality services in the country. In view of these findings, there is need for the government in collaboration with the private sector, and other tourism stakeholders to jointly work together to mitigate these gaps in order to ensure Tanzania destination maintains its competitiveness in the world. Future studies may focus on the need for examining the capacity gaps amongst the Tanzanian Missions abroad, which are paramount for successful implementation of Tanzania the Royal Tour Film. Also, another research may tend to identify and profile non-traditional tourist attractions in the country for inclusion into the next versions of the Tanzania the Royal Tour Film and other future initiatives.

Key words: Attractions, Royal Tour Film, Preparedness

INTRODUCTION

The Royal Tour is a maiden film that was launched in New York, U.S on April 18, 2022 and in Arusha and Zanzibar, Tanzania on 28 April and 7 May 2022 respectively (MNRT, 2022). The film is unique in the sense that, apart from presenting an informal and personal side of a President, it focuses a 360-degree view of a Tanzania, the home of number one Safari destination in the World, housing four of the most coveted adventure hotspots on earth: the Serengeti, Mount Kilimanjaro, Zanzibar, and Ngorongoro Crater compounded by the kind hearted people of Tanzania (MNRT, 2022). It is important to note that, the film tourism has been defined by Buchmann *et al.*, (2010) as the “visitation of a site or a location that is or has been used for or is associated with filming” (Buchmann *et al.*, 2010, p.233).

According to the Ministry of Natural Resources and Tourism [MNRT] (2022), Tanzania’s Royal Tour film content, through the strategic premiere USA market and timing have started paying dividends in terms of attracting significant inbound arrivals to the country. For example, a digital safari-marketing platform selling the East African region based in Copenhagen in Denmark, reported on the massive travel booking enquiries from USA, two months after the film was launched in the American market.

“For just two months our subscribers have recorded a total 6,405 safari booking enquiries mostly from USA, English speaking and Scandinavian countries, all craving for Tanzania destination, up from merely 241, a month

before the Royal Tour Film debut, a clear signal that the series has a far-reaching impact in stimulating tourism industry” said the Managing Director of the East Africa Travel Deals, Mr. Mikael Morlandee.

“New booking enquiries aside, there was a substantial number of tourists who had confirmed their travel in the other African destinations two years back, however, owing to the film are changing their minds and now they want Tanzania. A substantial number of prior confirmed bookings are now cancelling massively in favor of the Tanzania destination” Mr. Morlandee added.

Indeed, the key destination marketing executives in the USA are upbeat, saying that the Tanzania Royal tour film is the right shot at the right moment and will spur tourism industry more than ever before, as it is an eye opener for majority outdoor enthusiasts in their vast country.

“Americans are extremely eager to get back out into the world once again and Tanzania is uniquely positioned to offer them world-class nature and wildlife experiences that are authentically experiential in a way no other destination can offer,” said Mr. David DiGregorio Managing Director CornerSun Destination Marketing LLC in New York City.

Mr. DiGregorio whose firm was in 2021 engaged by Tanzania Association of Tour Operators (TATO), thanks to UNDP support, to promote Tanzania across the northern America said as the home of the Great Migration, Kilimanjaro, the Serengeti

and Zanzibar, there's no doubt that Tanzania is and will continue to be in high-demand with American travellers eager to take their first long-haul post-COVID adventure (MNRT, 2022).

For her part, the Association of Black Travel Professionals (ABTP) CEO, Ms Shawnta Harrison said the Tanzania Royal Tour film has moved the majority of African-American travellers who are planning their holiday elsewhere in Africa and the Caribbean (APTA News, 2022).

“Now were working with TATO as part of out agreement to see how we can develop the new tourism product, probably to be named as discover the ancestors roots in order to tap the potential market as we believe with the Royal tour film majority are excited to come and explore their descendant's culture” Ms Harrison explained.

She added: *“I'm very grateful to have a fruitful meeting with the TATO delegation on the eve of the Royal tour film premiere here in America. We are committed to redirect our traffic to Tanzania in collaboration with TATO”*.

Back home, the tourism players are busy rolling out a red carpet, refurbishing tourist vehicles, and renovating accommodation facilities as part of grand preparation to welcome the imminent influx of tourists.

Royal tour film is an apt branding strategy that will go a long way in stimulating tourism, thus putting the Country into a better position to achieve its five million visitors target by 2025. The choice of the debut country and timing were extremely imperative and would play an important role in rebooting the tourism industry hobbled by a brutal wave of Coronavirus. During the premiere of the documentary,

President Samia took the liberty to assure millions of potential tourists once again that Tanzania is the best place to spend their vacation, “We are very friendly. You will never regret visiting,” she added.

President Samia, who visited the US for business and diplomatic intentions, used the launch of the Royal Tour documentary to promote and improve the marketing of Tanzania's tourism to the world. The Royal Tour film is to be spread for viewing on multiple platforms in America—a strategic move to spread awareness and promote tourism digitally.

By the end of the presentation, it's likely that viewers' interest in visiting the country will be higher than before they had watched it. Even Tanzania's familiar aspects are enhanced because everything is shown from the personal perspective of the country's leader.

TATO chairman- Mr. Wilbard Chambulo, said that *“the tourism industry welcomes the Royal Tour film with open hands and he commended the timing. The royal tour film means to open-up endless opportunities not only for our tourism value chain, but the entire economy as the film will market Tanzania investment destinations to the global scene”*.

Holidaymakers quite often experience the “big five” — Elephant, Lion, Leopard, buffalo, and Rhinoceros—up close in the Serengeti National Park, hike up Mount Kilimanjaro or relax on the beach of a tropical island like Arab-influenced Zanzibar.

“If you are looking for variety, you are guaranteed to find it in Tanzania. Kilimanjaro, for instance, the hiker's Paradise. Kilimanjaro, the “roof of Africa”, attracts nature lovers from all over

the world with its imposing snow crown”
Mr. Chambulo said.

“The brilliant white beaches on the spice island of Zanzibar promise all-round pampering and plenty of relaxation”, Mr. Chambulo explained, adding that tourists should come to Zanzibar, to experience the tropical beauty.

“Its bathing holidays that smell of pepper, cloves and vanilla, where the azure sea gently laps your feet and your senses learn to fly. The year-round warm, crystal-clear water and the white powder-sand beaches make Zanzibar the African dream destination to unwind”, Mr. Chambulo explained.

Dar es Salam, the gateway to southern Tanzania, is the bustling metropolis located on the country’s mainland coast, which is hardly developed for tourism.

“Not far from the city you will find secluded beaches with oriental flair. The island dream of Zanzibar is just a stone’s throw away and the national parks in the south of Tanzania can be easily explored from here”, TATO chief concluded.

Many Americans associate Tanzania with safaris and, perhaps, Mount Kilimanjaro, but the first half of “The Royal Tour” explores parts of Tanzania that expand viewers’ understanding of the country.

Tourism business in Tanzania

The tourism sector is one of the key sectors that contribute to the economy at the national and global levels. Before the COVID-19 pandemic, Tourism’s contribution in terms of employment was 1 out of 4, and 10.3% (333 million) of the all the jobs, 10% (USD 9.6 trillion) of the global gross domestic product (GDP), and the expenditure for the international visitors

stood at USD 1.8 trillion (6.8% of all total exports) globally (Filep, King, & McKercher, 2022; Lim & To, 2022).

In Tanzania, the tourism sector’s contribution stands at 17.6 percent of GDP, 25 percent of foreign exchange, 4.5 percent of total employment, and 10 percent of total investments (Tryphone & Mkenda, 2022). Despite the Coronavirus Disease 2019 (COVID-19) global pandemic which severely affected the tourism industry in Tanzania, domestic tourism grew by 20.4 percent from 562,549 visitors in 2020 to 788,933 in 2021 with revenue increasing by 27.6 percent from TZS 9.7 billion in 2020 to TZS 12.4 billion in 2021 (Ministry of Natural Resources and Tourism [MNRT], 2022). Conversely, inbound tourism increased by 48.6 percent from 620,867 tourists in 2020 to 922,692 in 2021 with revenue increasing by 76 percent from US \$ 714.59 million in 2020 to US \$ 1,254.4 million in 2021 (MNRT, 2022).

Tanzania promotes itself as “Tanzania Unforgettable”, implying that Tanzania is unique in terms of tourist attractions. Since 2008, Tanzania has been nominated as Africa’s leading destination each year (Melubo & Kisasembe, 2022; Wamboye, 2022). In 2021, Tanzania emerged the winner out of 54 countries in Africa as Africa’s Leading Destination (Tanzania); Africa’s Leading National Park (Serengeti); Africa’s Leading Beach Destination (Zanzibar); Africa’s leading Green Hotel (Hotel Verde); and Africa’s Leading Luxury Island (Thanda Island, Zanzibar). Serengeti National Park won Africa’s leading National Park for the third time in a row (2019, 2020, and 2021). Thanda Island was also the top Global WTA destination as the world’s leading executive private island in 2021 (Melubo & Kisasembe, 2022; Wamboye, 2022).

From 2012 to 2016, the World Travel Association rated Tanzania, second to Brazil in terms of natural beauty (Richardson, 2022). As a tourism destination, the tourism products for Tanzania are a different amalgam of experiences, albeit to varying levels of development. Unlike other tourist destinations with landmark tourist attractions, Tanzania has unlimited tourist attractions. However, unfortunately, tourism players from the local, district, regional, and zonal/circuit levels are disorganized and each operates in isolation from the other (Pers.com Executive Secretary for Tourism Confederation of Tanzania, 2021).

Tourism Performance during the COVID-19 Pandemic in Tanzania.

During the period of January to April 2022, a total of 367, 632 tourists visited various

tourism attractions compared to 275, 097 tourists who entered the country during the similar period in 2021. This is an increase of 92, 535 tourists, and equivalent to 33.6 percent (Table 1.1). Out of 367, 632 tourist arrivals, 124, 212 tourists arrived to the country via Zanzibar, which is equivalent to 35.8 percent of total visitors (National Bureau of Statistics, 2022).

According to the Tanzania’s National Bureau of Statistics (2022), there is a positive trend of the tourism growth following the reduced COVID-19 pandemic in the country and elsewhere in the world. Table 1.1 shows that from January to April in 2021 and the same period in 2022, there has been 33.6 percent increase of the international arrivals in Tanzania. The increase in tourists to the country is mainly due to the lifting of the COVID-19 travel protocols world widely

Table 1.1: International Tourists Arrivals from January to April 2021 and 2022

Month	2021	2022	Addition	Change (%)
January	79,116	94,128	15,012	19.0
February	79,730	100,936	21,206	20.6
March	72,285	93,784	21,499	29.7
April	43,966	78,784	34,818	79.2
Total	275,097	367,632	92,535	33.6

Source: Tanzania Immigration Services Department, 2022

Before the COVID-19 pandemic in 2019, a total of 1,510,151 international tourists visited Tanzania with the largest number of 160,296 tourists entering the country in December 2019. Following the COVID-19 pandemic, the international tourists’ arrival declined up to 620,867 in 2020, with a smallest number of tourists counted at 7,105 tourists as of April 2020. In 2021, the number of the international tourists’

arrivals increased to 922,692, equivalent to an increase by 48.6 percent. Currently, the increase in growth rates of economic activities related to the tourism sector involving Arts and entertainment (11.7 percent) and accommodation and food services (11.3 percent) are among the indicators showing prospective tourism sector performance in the country (National Bureau of Statistics, 2022).

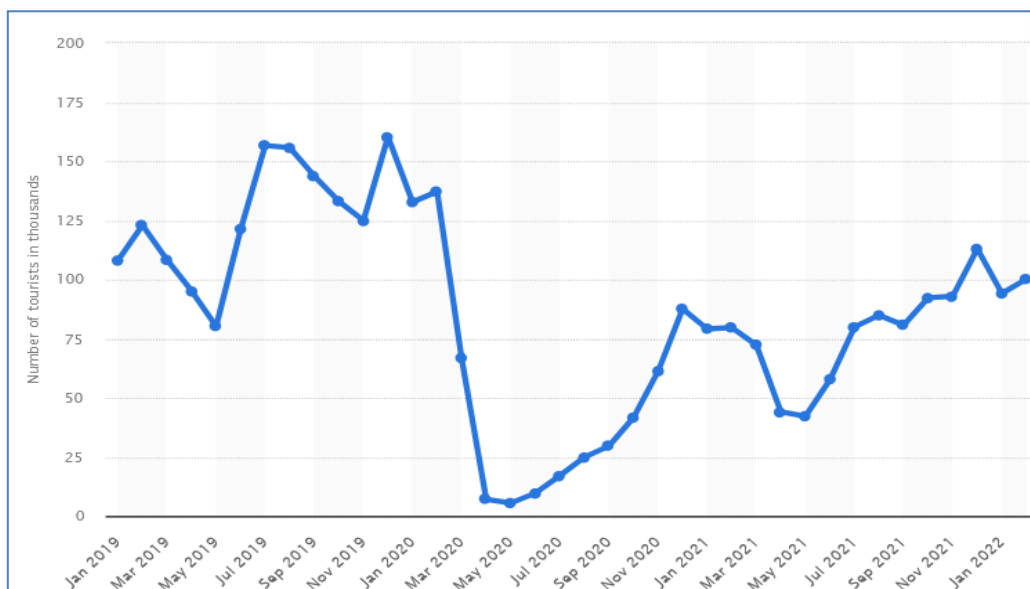


Figure 1: Monthly tourist arrivals in Tanzania 2019-2022

Source: Statista (2022)

Motivation and Cognitive Interest.

More than 80 million travellers choose worldwide film destinations, demonstrating the strength of the film or television in attracting tourists to destinations (Travel Competitive Intelligence Research, 2018). According to Beeton (2016), the impact of films on travellers’ motivation to visit a destination is influenced by the development of “new images, alter negative images, and strengthen weak images” of a destination in order to promote its attractiveness. Millions of visitors travel with the aim of visiting the scenes of a film.

Statement of the Problem.

Several scholars such as Robinson *et al.*, (2011) and Ágnes, Ádám, Balázs, & Zoltán, (2018) noted that films and the movies induce tourism at the destinations. Beeton (2006) considers that initial studies on assessing the effect of films on destinations, date back to the late 1990s. However,

For the targeted destination, it is a way to attract new tourists and achieve greater financial benefits due to an increase in tourist demand. In the past, the film industry was ignored a promotional tourism strategy, but it is, without a doubt, one of the most indirect forms of inducing a future tourist to a destination (Beeton, 2016). Therefore, the thrust for assessing status of the tourism stakeholders towards the impact of Tanzania the Royal Tour Film is crucial to comprehend the preparedness behind every individual that is responsible for hosting tourists at the Tanzania destination.

Robinson *et al.*, (2011) argue, scholarly studies on a relationship between films and tourism began in the 1960s. Conversely, a group of academics including Riley, Tooke, Baker, and Van Doren began to consider the concept of “movie induced tourism” (Beeton, 2006; Robinson *et al.*, 2011). Increasingly, the interest for researching more complex issues about film-induced tourism has been growing evince since

(Beeton, 2006). While, Kork (2013) believes there is a gap in literature when exploring the effect of films at destination, Roesch (2009) addresses the importance of not only focusing on the theoretical sight of film tourism but rather on the analysis of the response, behaviour and experience of tourism players at destinations.

In addition, while the effects of films on the visitors' numbers are evident, there are (2010, p.22). In addition, Hudson and Ritchie (2006) mention several effects such ; exploitation of local population; environmental impacts and location different to film. The first consequence is price costs that, even before the release of a film, increase due to production crews (Riley *et al.*, 1998). Also, the vulnerability of traditional holiday makers who travel with an inexpensive budget and cannot afford staying at those locations anymore (Beeton, 2005). Furthermore, capacity at destination becomes an issue from the large demand of services and the increase in visitors (Tooke & Baker, 1996). This could

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Films and Travel Decision.

tourist destination, which is when the concept of film tourism is identified (Araújo, 2012). Therefore, film tourism refers to “any movement of people directly or indirectly motivated by audio-visual products” (Beeton, 2005; Connell, 2012; Hudson & Ritchie, 2006 cited in Araújo, 2012, p.7).

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issues related to tourism stakeholders at the destinations, which have been acknowledged (Beeton, 2005; Croy & Buchmann, 2009; O'Connor, Flanagan & Gilbert, 2009 cited in Croy, 2010). As in all types of tourism, the potential effects for film tourism “need to be managed to make the most effective and sustainable use for the destination and the destination's communities” (Croy,

as the increase of prices and labour costs; crowding

dramatically result in the loss of privacy and local facilities for locals, an increase in traffic, and pedestrian congestion (Hudson & Ritchie, 2006). And, in turn, these problems can lead to a loss of visitor satisfaction caused by the different portrayal of the tourist attractions in the film and in the real world (Hudson & Ritchie, 2006, p.261). Thus, a need for study that aims to assess the tourism stakeholders' preparedness in response to the effects of Tanzania the Royal Tour Film becomes inevitable.

Films and travel decision are two concepts that are closely connected, which implies that one affects the other in a direct or indirect way. Films can influence someone in their impression and desire to visit a

Moutinho's (1987) approach to tourist process focuses on the aspect of tourism behaviour. It depends on the behaviour of the tourist that is influenced by diverse factors such as “Personality”, “Learning”, “Motivation”, “Perception” and “Attitudes

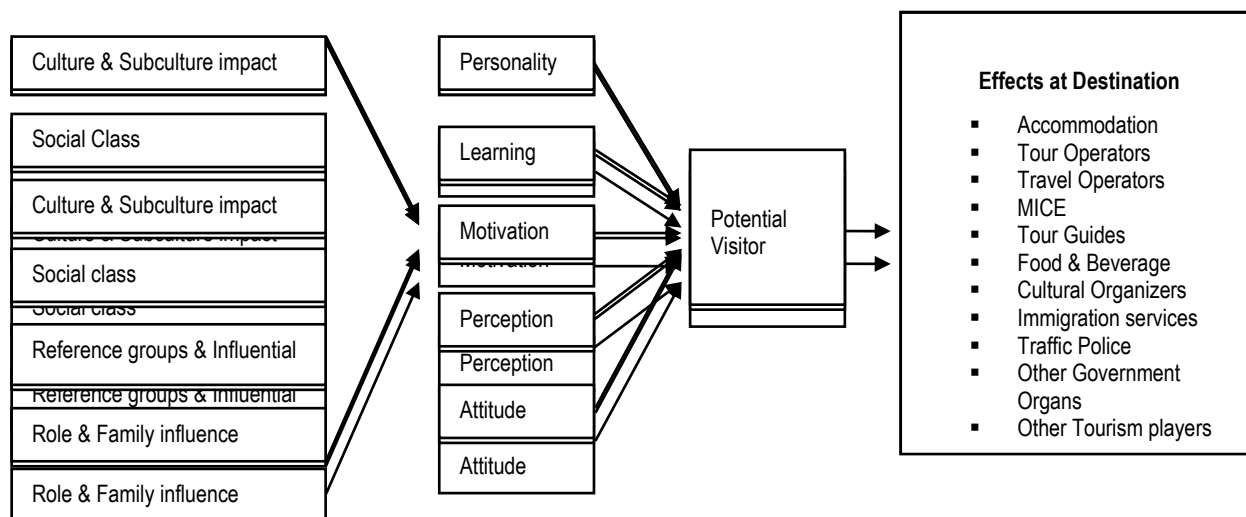


Figure 2: Influences on Individual Travel Behaviour

The planning for a trip has become a much longer process than the actual vacation, thus travellers' vacationing behaviour has matured and become more sophisticated (Moutinho, 1987). From Figure 2 one can deduce such behavioural factors and effects of visitation at destination are shaped by past influences and cultural backgrounds; influencing the decision-making process of an individual. In order to develop marketing strategies and campaigns, it is crucial to have a deeper understanding on how tourism stakeholders respond at destinations (Moutinho, 1987).

Films as a Motivation for Tourism

When researching about film-induced tourism, it is crucial to investigate the motivation of visitors to travel to a film site, as well as more complex insights such as private and personal motivations (Beeton, 2010). Motivation is perceived, among other variables, as one of the contributors that can help explain tourist behaviour (Crompton, 1979, p.409). Macionis (2004) has attempted to define motivation as "the driving force within an individual that impels them to action" (Crompton, 1979; Macionis, 2004, p.88).

In order to understand tourist motivations, most theories revolve around the "pull" and "push" factors concept. Crompton (1979) explains push factors as the sociopsychological intentions for going on vacation, and the pull factors as the main motive influenced by the destination rather than from the traveller. The second concept shows the cultural aspect since the destination itself is the one that "pushes" or influences the person to travel. Therefore, push motives explain "the desire to go on vacation while pull motives have been thought useful for explaining the choice of destination" (Crompton, 1979, p.410). While Riley and Van Doren (1992) believed that movies are a pull factor in tourist motivation, Macionis (2004) interpreted Crompton's push and pull theory as "a simple and intuitive approach for explaining the motivations underlying film tourist behaviour" (Beeton, 2010, p.89). However, Beeton (2005) argues that motivation can be more intricate because visitors that decided to travel to film sites were coming "to re-live an experience (or even emotion) encountered in the film, reinforce myth, storytelling or fantasies, or for reasons of status (or celebrity)" (Beeton, 2010, p.2).

Moreover, different forms of film-induced tourism are relevant to understand an individual's motivation behind traveling to a film tourism site. Beeton (2016) distinguishes between two different forms of film-induced tourism such as 'onlocation' tourism and 'off-location' tourism. The first one involves the film site as an attraction, film tourism as a holiday, and organized movie tours. The second type of form involves film studio tours and film studio theme park tours, among others. Also, different events such as movie premieres, film festivals and fan-based events are part of the experience of film tourism (Beeton, 2016; Karpovich, 2010). Furthermore, Karpovich (2010) argues that the second category of tourism that Beeton (2005) described as 'off-location tourism' has been essential for the development of moving images (Karpovich, 2010). Imagery, consumer behaviour and motivation play an important role in the film and tourism industry. This, in turn, has become recognized by the academia and the industry as a whole as 'film-induced tourism' (FIT) (Bolan & Williams, 2008).

Film-induced Tourism

Tourism can turn out to be the main protagonist, or on the contrary, the worst antagonist of a country. Beeton (2016), while examining the impacts of it, states that tourism can be "a force for peace, an economic and social generator and diversifier, and can bring communities together" or apart. Film tourism sites have influenced tourists to visit a certain country or location while hoping to increase the inflow of tourists in developing countries (Beeton, 2005). Hence, FIT can be defined as "establishing an image of a place in people's minds and encouraging or influencing consumers in their travel choices" (Bolan and Williams, 2018, p. 385). While FIT presents numerous benefits, it is essential to address the

negative aspects of it. As Beeton (2005) argues that the effects of film tourism can affect both negatively and positively a destination over a period of time. A major negative effect experienced in FIT is the massification of tourists on a destination.

Within the tourism industry, several trends have been distinguished. Some of them include experiential tourism, growing tourism, affordable luxury tourism, personalization in the travel, and responsible tourism, among others (STR, 2019). The tourism industry has been changing in the past year, which has been reflected upon the evolution of society (STR, 2019). This has led to an increase in disposable income, a higher life expectancy, and an improvement in technology empowering customers, who developed the ability and power to plan and book their travel by themselves (STR, 2019).

Relation between Film and Tourism.

The correlation between film and tourism has been several times recognized and acknowledged through a number of case studies and in marketing campaigns of DMOs around the world (Tooke & Baker, 1996; Riley *et al.*, 1998; Morgan *et al.*, 2003; Jones & Smith, 2005; O'Connor *et al.*, 2010 cited in Hudson *et al.*, 2010). In terms of statistics, a survey done in the UK showed that 8 out of 10 individuals choose their next holiday destination based on a recent film they watched, and 1 in 5 "actually make the 'pilgrimage' (Beeton, 2005, p.34) to the location of their favourite film" (Hudson *et al.*, 2010, p.178).

Furthermore, with the emergence of the area of film-induced tourism, TV series also become part of the same movement (Mordue, 1999, 2001; Beeton, 2000, 2001). This new field, introduced as movie-

induced tourism, encompasses television and cinema. However, the focus was mainly placed on business-related issues, including destination marketing, image and tourist motivation (Beeton, 2010).

Travelers arriving at a destination do so because of the image they have received from the film and television (Bernardi, 2016). The locations of the filming or venue of recordings, refer to the sites where the plot of the film is developed, to the locations where the film studios are located, to destinations linked to the life of actors, producers, scriptwriters or directors, and also includes museums and other resources related to films (Bernardi, 2016).

Forms of Film-Induced Tourism

Another definition used by Horner and Swarbrooke (2020, p.4) to explain tourism is a “short-term movement of people to places some distance from their normal place of residence to indulge in pleasurable activities.” However, the authors state that the concept of tourism is not a simple one since it does not englobe the profitability of the business field of tourism where the aim of the trip is solely work rather than leisure-related (Horner & Swarbrooke, 2020). Therefore, it is important to differentiate the types of tourism within the film-induced tourism field. It may involve a traveller doing a trip for the sole purpose of visiting the site, also as part of an organised tour location, or to visit a particular spot where a scene has taken place (Roesch, 2009, p.10). Also, different characteristics of film tourism are defined by the type of location portrayed in the film (Roesch, 2009, p.10). This means that a film venue can act as the main attraction or, on the other hand, it can benefit from the illusion that the filming has taken place somewhere else than where it was portrayed (Hudson & Ritchie, 2006, p.261).

Impacts of Film-Induced.

Tourism Film-induce tourism presents opportunities and challenges that affect the surroundings and the travellers themselves. For instance, some questions referring to the film tourism industry can be narrowed to how are films affecting the image of a destination, whether it is positively or negatively, the extent by which is affected, on a lower or bigger scale, and whether it will promote tourism (Croy, 2010). Based on all these variables, and the film and audience's interpretation, it is necessary to analyse the benefits of films for marketing purposes (Croy and Walker, 2003; Beeton, 2005; Hudson and Ritchie, 2006 cited in Croy, 2010).

Some of the benefits of film tourism include the appeal to large and varied markets, as it offers something for everyone, and tourism organizations “can use films as springboards for marketing campaigns if the films are seen as appropriate for the destination” (Hudson & Ritchie, 2006, p.256). In terms of marketing opportunities, it is a great showcase to get to know a destination when the film is being released and distributed worldwide reaching millions of screens. Moreover, it gives a great opportunity to business and services that are looking for “the extension and strengthening of the visitor season” (Hudson & Ritchie, 2006). In general, a higher number of visitors leads to a positive impact on the economy. One of the main economic benefits and factors of film tourism is that visitors can go to the film destination at any time, making it an all-year attraction, and lowering seasonality problems (Hudson & Ritchie, 2006). In addition, it helps with turning buildings and streets from ordinary and unknown to suddenly acquiring status and attraction (Hudson & Ritchie, 2006).

Another relevant aspect of film tourism is its capacity to endure (Hudson & Ritchie, 2006), proving that films keep attracting visitors each year. A study by Riley et al. (1998) discovered that, even though the highest interest comes after a film is released, the visits to a film destination increased by 54 percent five years after their releases (from the 12 films they studied) and proved that images were

retained for a long period (Rewtrakunphaiboon, 2009; Hudson & Ritchie, 2006). These enduring effects portray the success of some destinations where connections between the real-life image and the screened image is more apparent, which lead to a tourism increase in that area even when the film was released a while ago (Hudson & Ritchie, 2006).

Table 2: Impact of Films on Visitor Number

Film	Location	Impact of visitor number
Pride and Prejudice (2005)	Lyme Park, England	150% increase
Mission: Impossible 2 (2000)	National Parks in Sydney	200% increase
Troy (2004)	Çanakkale, Turkey	73% increase
Harry Potter (2001)	Various locations around the UK	Increase of 50% or more in all filmed locations
The Beach (2000)	Thailand	22% increase in youth market
The Lord of the Rings (1998)	New Zealand	10% increase every year 1998 to 2003 from UK
Gorillas in the Mist (1998)	Rwanda	20% increase
Miami Vice (1995)	Miami	150% increase in German visitors
Sense and Sensibility (1995)	Lyme Park in Cheshire, U.K.	150% increase in visitors
Braveheart (1995)	Wallace Monument, Scotland	300% increase a year after release

Source: Own elaboration from: Riley & Van Doren (1992); Tooke & Baker (1996); Grihault (2003); Croy & Walker (2003); Cousins & Aderek (1993); Busby, Brunt & Lund (2003); Riley & Van Doren (1998); Hudson and Ritchie (2006a) cited in Rewtrakunphaiboon (2009)

As shown in Table 2, there are a number of studies that reveal the increase in visitation numbers at film locations. Several academic authors investigated this number of increases by giving several examples from different films. For instance, Riley et al. (1998) analysed the variations in the number of visitors from ten film sites in the United States. Moreover, Busby and Klug (2001) examined visitor profiles from an area in London, Notting Hill. Also, Kim and Richardson (2003) investigated how

the movies Before Sunrise and Groundhog Day influence the viewers' impression of Vienna and Pennsylvania, respectively (Rewtrakunphaiboon, 2009).

Economic, Social and Cultural Impact of Film Tourism.

Globally, in the year 2017 there were eighty million international tourists who travelled to visit destinations where films, series or commercials were shot (TCI Research,

2018). In this sense, it can be said that the impact of filming in a territory implies an effect on the economy on three levels: during *filming*, *after filming* and with regard to the *image of a destination* (TCI Research, 2018).

The first tends to generate an economic effect from the hiring of professionals: It is estimated that more than 30% of the overall budget of a production takes place in the chosen locations, either through direct, indirect and induced expenses (TCI Research, 2018). The second, relates to the economic impact after filming, is directly related to film tourism: the increase in the number of films and, above all, globally successful series, has allowed destinations to create tourism products that allow viewers to visit locations and routes that are known worldwide thanks to these audiovisual works. Thirdly and finally, the effects of film tourism on the image of a destination are very positive, as they considerably improve a destination's reputation.

Looking at the economic impact of film tourism, it's important to note that, due to the lack of economic data collection by most tourism administrations in different countries, including Tanzania, measuring this impact, not only in economic figures, but also in increased numbers of tourists, is advisable. Thus, taking as an example the figures shown in Table 2, impact of film tourism, it is possible to observe large increases in visitors as a consequence of film tourism. This is the case, where stimulations come up with a considerable increase in visitors at the destinations.

Role of Films in Destination Promotion.

The association of films with organic images are “increasingly creating ‘incidental’ tourism promotional images”

(Croy and Walker, 2003; Hudson and Ritchie, 2006; di Cesare, D'Angelo and Rech, 2009 cited in Croy, 2010, p.21). The representation of a place in a film can benefit a country by advertising all the goods and products they have to other film producers, building the location's industry (Croy, 2010). In addition, the potential impacts of film on tourism must be well managed “to make the most effective and sustainable use for the destination and the destination's communities” (Croy, 2010, p.22). This is applied to all other forms of fictional media, which can positively impact a destination and its community, to the extent of not damaging the area and its surroundings (Croy, 2010).

However, Hudson and Ritchie (2006) argue that destinations must be more innovative and creative in their marketing and promotion. Films that expose a city, region, or country act as an advertisement tool that reaches a potential audience, who “cannot be reached through traditional tourism promotions” (Hudson & Ritchie, 2006, p.394).

Methodology

The study employed both qualitative and quantitative methods, involving 117 tourism respondents who were conveniently drawn from over 1200 tourism stakeholders in the sub-sectors of accommodation (25), tour operators (32), tourism investors (18), tour guiding (32), arts and crafts (10), among others. The data gathered were processed and analysed qualitatively and quantitatively. Qualitatively, the researcher first translated and categorized them into various themes and sub-themes basing on the research objectives and research questions in both FGDs and in-depth interviews guides. Data from the in-depth interviews were transcribed and analyzed using

thematic data analysis. Verbatim quotes were used to illustrate points of views during preparing this report. SPSS version 20 was used to analyse the quantitative data.

KEY FINDINGS

i) Tourism stakeholders in Tanzania.

In Tanzania, the tourism players are organized under the Tourism Confederation of Tanzania (TCT), which is an umbrella organization representing the private business sector (Sub-Sector Associations) involved in the tourism industry at the national level. TCT is the apex body for the

tourism industry and was formed in June 2000. Figure 3 indicates TCT members including; the Tanzania Association of Tour Operators (TATO); Tanzania Society

of Travel (TASOTA); Tanzania Air Operator Association (TAOA); Hotels Association of Tanzania (HAT); Tanzania Hunting Operators Association (THOA); Tanzania Professional Hunters Association (TPHA); Tanzania Tours Guides Association (TTGA); Zanzibar Association of Tourism Investors (ZATI); and Tanzania Association of Cultural Tourism Organizers (TACTO).

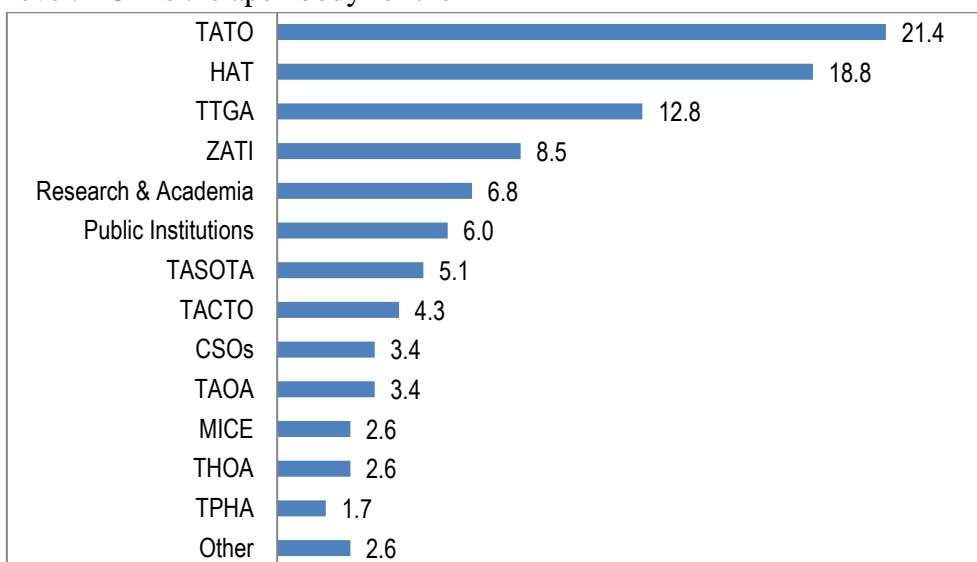


Figure 3: Distribution of Tourism Players by Sub-sector in Tanzania

Due to the nature and complexity of the tourism industry, which is rapidly growing in Tanzania, TCT has not been able to bring together all tourism players across the country. For instance, the Meetings, Incentives, Conferences, and Events (MICE) organizers; Food and Drinks providers; transporters; Diving and Marine Sports Tourism; research & academia, civil organizations (CSOs), and many others are not included in the current TCT representation in the country. Currently, each tourism organization operates in isolation from the other players at the regional and district levels. There is

minimal vertical and horizontal inter-organizational linkage among the tourism associations in the country. However, the study findings show that tourism players subscribing to TATO are the majority (21.4 percent), followed by the players under HAT (18.8 percent), and TTGA (12.8percent) (Figure 3).

ii) Level of awareness on Royal Tour Film.

Figure 3 shows that 68 percent of the tourism stakeholders were aware of the Tanzania the Royal Tour Film. 49 percent

were not aware of the Royal Tour Film. This implies that there is a reasonable level of awareness among the key tourism

stakeholders in response to the effects of Tanzania the Royal Tour Film.

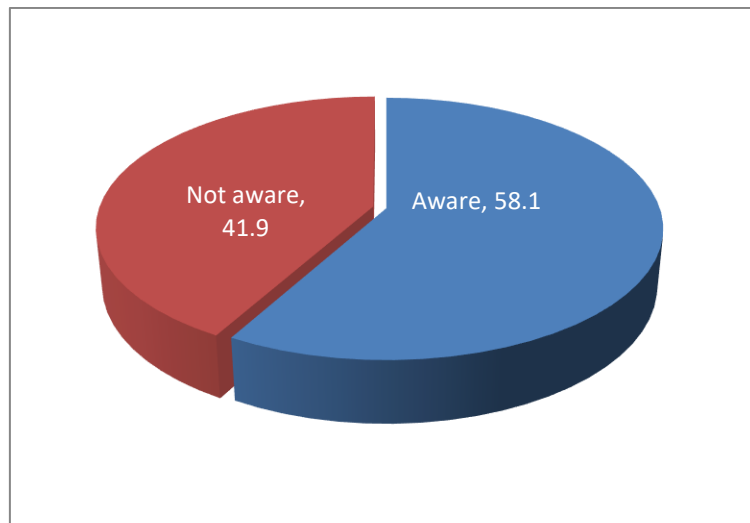


Figure 3: Level of Awareness on Royal Tour Film

iii. Level of Awareness by Sub-sector

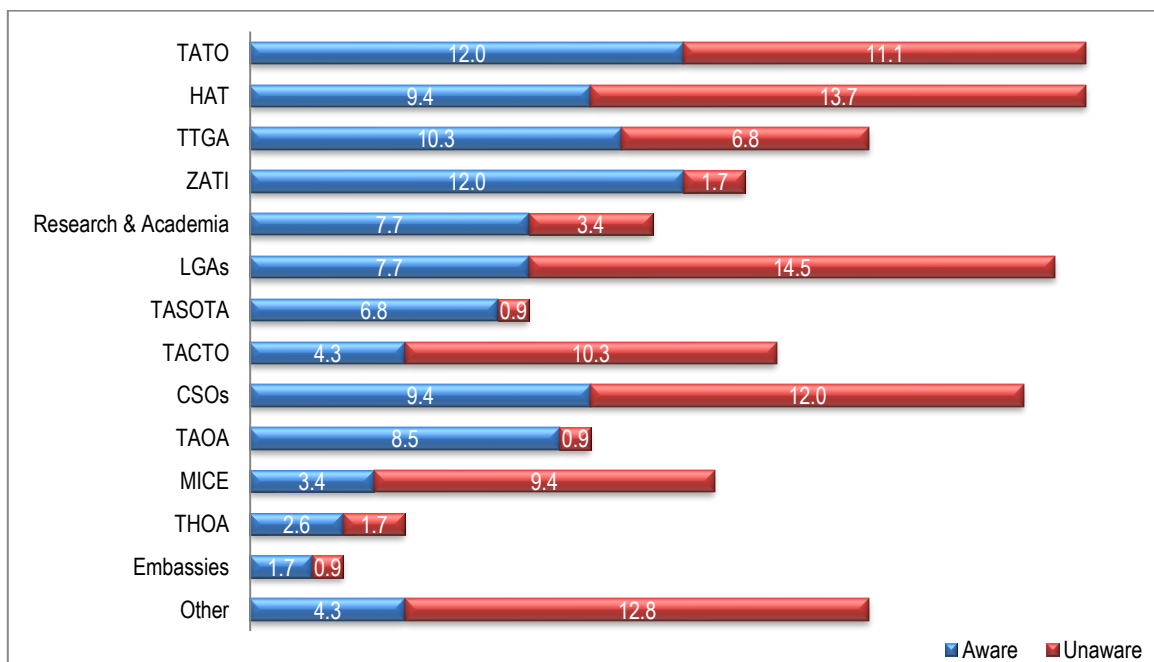


Figure 4. Level of Awareness on Royal Tour by Sub-sector

The study reveals that the level of awareness by tourism subsector was relatively high for TATO and ZATI (each 12.0%), followed by TTGA (10.3%) and HAT (9.4%) constituents. This is probably due to their level of organization and the way they operate, especially

communication among their members. However, the study established that the level of unawareness on issues related to Royal Tour among the tourism players was high on side of the Local Government Authorities (LGAs) (14.5%), followed by HAT (13.7%), other actors (12.8%) and

CSOs (12.0%). This implies that there is a need for raising awareness on the Royal Tour among key tourism players, particularly to the LGAs, HAT, other tourism players (such as food & beverage operators, art & crafts, etc), and CSOs in Tanzania and beyond.

iv) Level of preparedness for handling tourists.

Analysis by level of preparedness among key tourism players for handling tourists as

a result of Tanzania the Royal Tour Film is presented in Figure 5. Accordingly, ZATI (16.2%) demonstrated high level of being prepared followed by TATO (14.5%), and TAOA (12.8%). On the other side, LGAs (16.2%) indicated low level of preparedness followed by other tourism players (13.7%) and TATO (12.8) members. Generally, the study findings imply that that majority of the key tourism players in the country are not preparedness for handling large numbers of tourists, if the situation is left unattended.

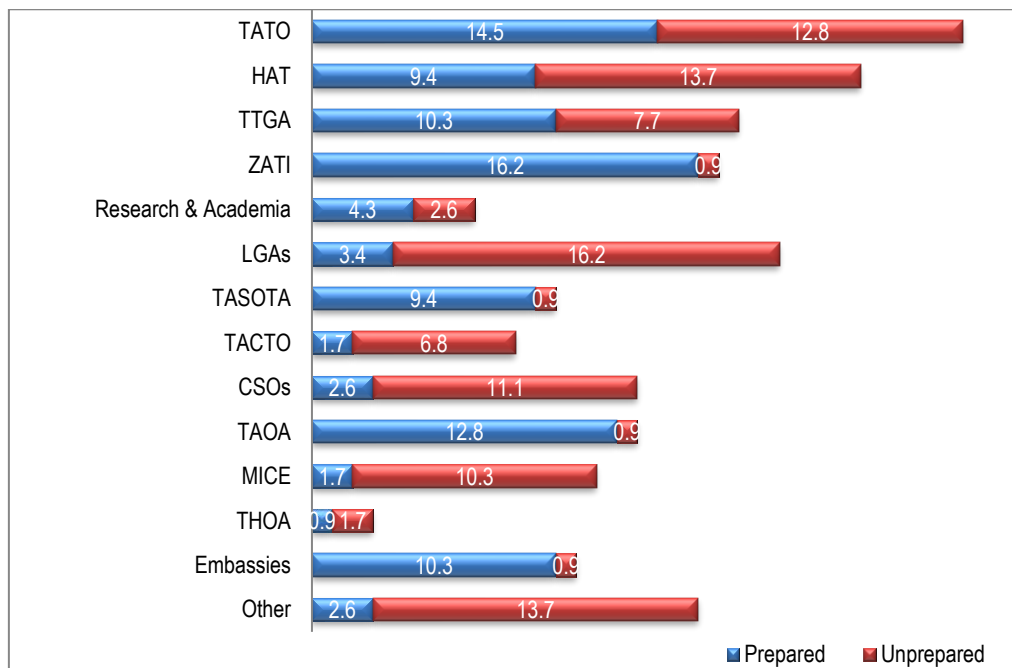


Figure 5. Level of Preparedness among Tourism Players

v) Capacity Building on Tourism and Hospitality Issues.

Analysis of capacity building by tourism players show that research and academic and TAOA (each 72.0%) were the most trained stakeholders followed by TASOTA (17.6%) and CSOs (15.8%). On the part of those tourism players, which have not had training on tourism and hospitality issues, included LGAs (68.2%),

embassies (60.0%), and TTGA (55.0%), among others. Furthermore, THOA (57.1%), HAT (40.7%), and TATO (40.0%) indicated that they have had partial training on tourism and hospitality issues in the past (Figure 6). The findings imply that there is a need for training on tourism and hospitality aspects among tourism players in order to strengthen their capacities for providing best services to the visitors in Tanzania.

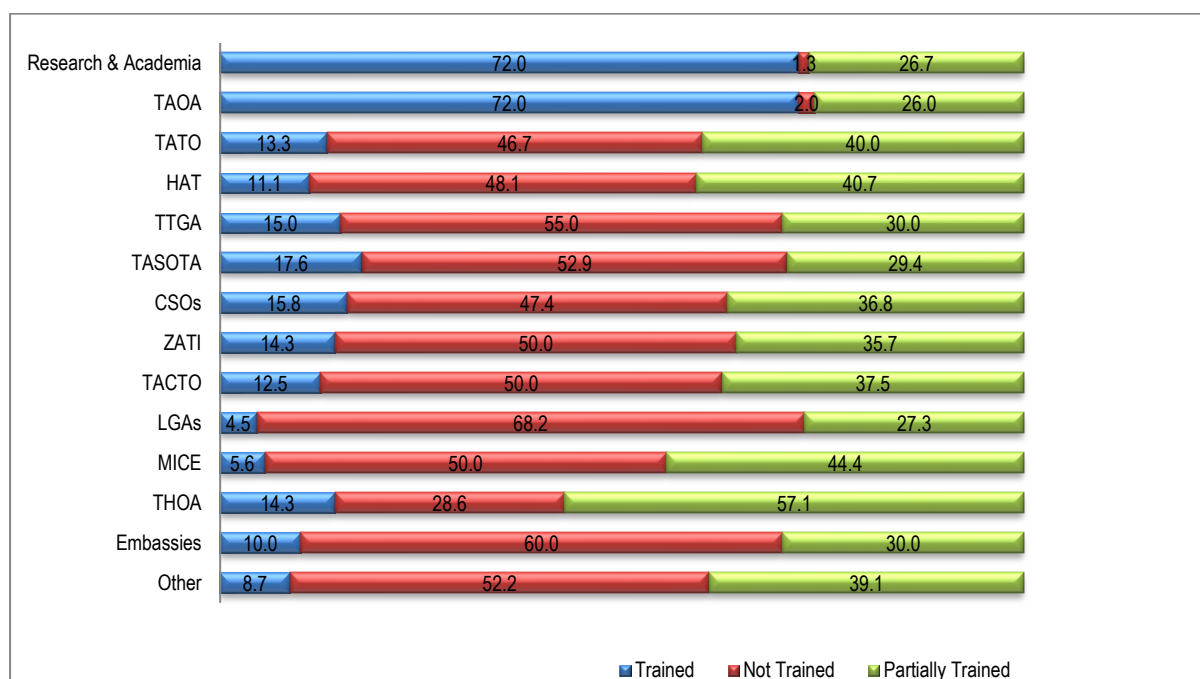


Figure 6: Percentage distribution of capacity building among tourism players

vi) Proposed Model for scaling up Tanzania the Royal Tour Film.

Given that Tanzania the Royal Tour Film is the first initiative of its kind in the Tourism Sector in the history of Tanzania, therefore efforts for scaling it up should be well planned by the tourism and hospitality professionals. This study finds a need for allocation of resources and establishing a department at MNRT solely for ensuring that Tanzania the Royal Tour Film becomes a success. All existing and future projects and programs of the same nature and scope may subscribe the same department. Currently, Tanzania lacks such an entity that is exclusively responsible for the implementation, monitoring, evaluation and coordination of programs at the national and international levels. Among the other objectives of the proposed unit/department will be mobilization of resources.

vi) Tourism Players by Policy and Legal Awareness.

Figure 7 presents the level of awareness on tourism policy and legal issues among tourism players in the country. Accordingly, research and academia (64.0%) members seem to have high level of legal and policy awareness, followed by TAOA (52.0%), and HAT (29.6%) constituents. Tourism players without adequate tourism policy and legal awareness included embassies (60.0%), TTGA (55.0%) and LGAs (54.5%). Furthermore, a number of the tourism players stated they do have partial awareness on tourism policy and legal issues. These included; THOA (57.1%), MICE (44.4%), and LGAs (40.9%). The findings demonstrated the need for awareness rising campaigns on legal and policy issues for the tourism players in the country.

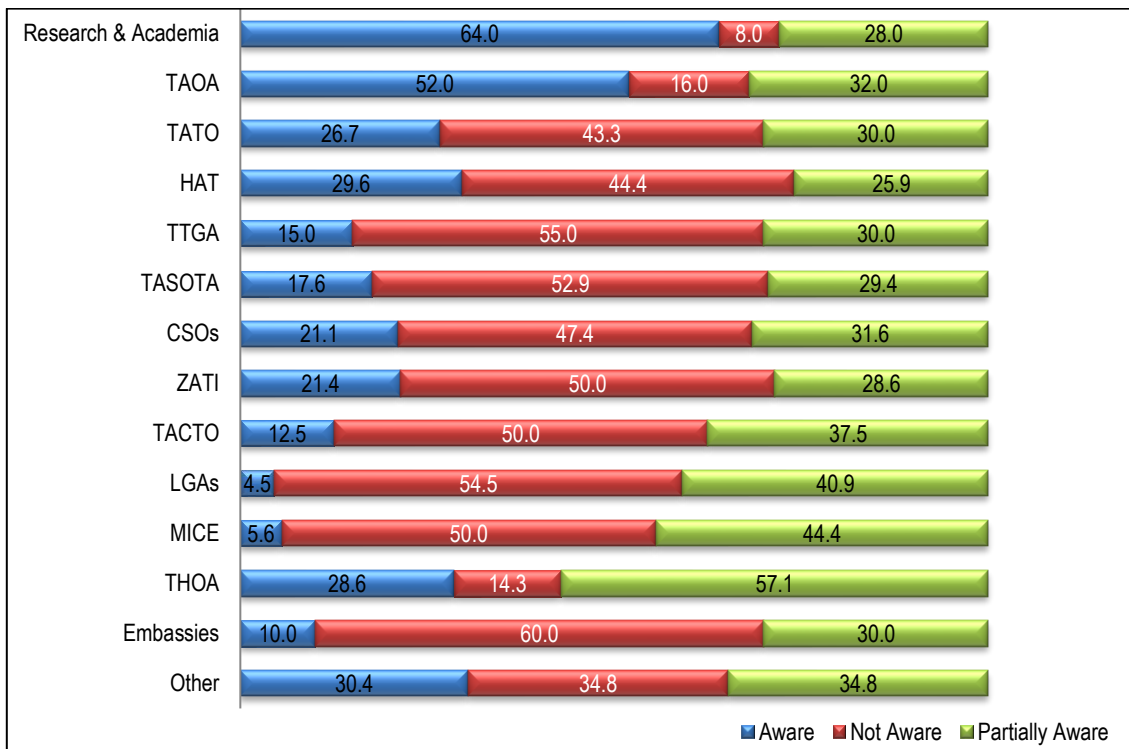


Figure 7: Percentage distribution of Tourism Players by Policy and Legal Awareness

CONCLUSION

This study presents status of preparedness among the key tourism players following the launch of Tanzania the Royal Tour Film in USA and Tanzania in April and May 2022, respectively. The film aims to promote Tanzania’s tourism attractions and investment potentials across the world. Given the visitors arrivals records since the launch of the Film, and the empirical evidences, no doubt that visitors’ records will significantly increase. However, this study notes that there is inadequate awareness of the expected impact of the Royal Tour Film among the tourism players, leading to lack of preparedness for receiving, hosting and handling massive numbers of tourists in the country. The study also found that majority of tourism players face serious capacity issues, especially in managing large numbers of visitors, especially international tourists. Furthermore, it has been established that the majority of tourism players have little understanding of the legal and policy issues governing tourism and hospitality services

in the country. In view of these findings, there is need for the government in collaboration with the private sector, and other tourism stakeholders to jointly work together to mitigate these gaps in order to ensure Tanzania destination maintains its competitiveness in the world.

RECOMMENDATIONS

Developing a comprehensive strategy for the implementation of Tanzania the Royal Tour Film: In order to successfully implement the Tanzania Royal Tour Film, there is a need for developing the comprehensive strategy for two (2) consecutive phases of five (5) years each starting from July 2022-July 2027 (Phase 1), and July 2027 to July 2032 (Phase II). The envisaged Tanzania the Royal Tour Film Strategy will provide a general direction set for this initiative and its subsequent components to ensure Tanzania destination receives 5,000,000 tourists by 2025, and 10,000,000 tourists by 2030; and becomes a leading country in attracting

more foreign investments in SADC and across Africa region.

Promoting Tanzania's tourism attractions in traditional and non-traditional tourist source countries:

Tanzania the Royal Tour Film was launched in the USA and Tanzania. There is a need for promoting Tanzania's tourism attractions in traditional and non-traditional tourist source countries, especially China, South Africa, United Kingdom, Netherlands, France, Switzerland, Italy, Israel, Turkey, Germany, Russia, South Korea and Japan. Tanzanian missions abroad are well positioned to carry out promotion of Tanzania the Royal Tour Film.

Engagement of Competent and Experienced Tanzanian Tourism Professionals:

Existing competent and experienced tourism professionals in Tanzanian Public Service need to be transferred to the President's Office and the Ministry of Foreign Affairs and East Africa Cooperation for coordination and implementation of Tanzania the Royal Tour initiatives. In addition, there is need for the Ministry of Foreign Affairs and East Africa Cooperation to recruit tourism professionals and place them at the strategic Tanzanian Embassies and consulates as Tourism Attachés. The Tourism Attachés will be solely responsible for promoting tourism and investment potentials, especially Tanzania the Royal Tour Film in countries under representation.

Allocation of adequate resources: The implementation of Tanzania the Royal Tour Film requires adequate resources, especially the financial resources. Its implementation should be done in two consecutive phases of five (5) years each, starting from July 2022-July 2027 (Phase I), and July 2027 to July 2032 (Phase II).

Apart from the government subventions, the financial resources may be outsourced from the private sector, voluntary contributions, bilateral and multilateral donor agencies. Also, financial resources may be raised through fundraising events.

Promotion of other Tanzania's tourism attractions and investment potentials:

Tanzania has abundant natural and cultural tourism attractions and investment potentials which were not featured by Tanzania the Royal Tour Film. There is need for ensuring that all key natural and cultural tourism attractions and investment potentials in the country are included in Tanzania the Royal Tour film promotion strategy. This requires multisectoral engagement and involvement of various sectors across the economy.

Awareness rising: Tanzania the Royal Tour Film if well promoted across the world, will significantly increase the number of international tourists' arrivals in the country. However, due to the existing inadequate coordination and collaboration among the tourism players, there are chances that the inbound tourists may not get the image of the country's beauty which was portrayed in Tanzania the Royal Tour Film. Also, despite the government sustained fight against corruption among government officials, there are still few unethical individuals who may derail the investors interested to bring their capitals to Tanzania. In view of this context, there is need for raising awareness on the expected impacts of Tanzania the Royal Tour Film among the key tourism stakeholders in the country.

Monitoring and Evaluation: Monitoring and evaluation is an essential component to this program. Through this process, the Government will be able to collect, analyze

data, and determine if the envisaged Unit/Department is fulfilling its goals. Monitoring be continuous, through the duration of the program, while valuation will be conducted twice, particularly after completion of Phase I and Phase II. This will assess how well the program performed in Phase I and Phase II.

Areas for further research: There is a need for assessing the capacity gaps amongst the Tanzanian Missions abroad, which are

paramount for successful implementation of Tanzania the Royal Tour Film. The findings of the assessment will inform the design of a comprehensive strategy for implementing the Tanzania Royal Tour Film in the country and abroad. Also, there is need for identifying, profiling and promoting non-traditional tourist attractions in the country for inclusion into the next versions of the Tanzania the Royal Tour Film and other future initiatives.

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