

Art, Culture and New Technologies  
in Latin America and the Caribbean  
Creative Economy

# Tourism and Nation Branding

Trends and Digital Strategies



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# Introduction

Can digital technologies enable new tourist experiences? How can tourist destinations and nation brands be constructed and promoted in the light of cultural industries and digital technologies? How can a territory and its brand be managed through digital technologies in the current context? How is tourism in Latin America and the Caribbean facing the challenge of economic recovery?

The questions above—central to this publication—echo the report *Vision 2025. Reinvest in the Americas: A Decade of Opportunity*, of the Inter-American Development Bank (IDB), which states that in the years to come, in order for the region to gain economic recovery, it will be necessary to invest in digitization and the rapid adoption of new technologies, while encouraging innovation and entrepreneurship as well as supporting SMEs.<sup>1</sup>

Today there are massive and still insufficiently explored opportunities to promote tourism and nation brands through cultural and creative industries and digital technologies. The main objective of this publication is to identify the possibilities, challenges, and strategies for this sector, from the standpoint of the contribution of the creative economy in Latin America and the Caribbean (LAC), particularly through the use of new technologies in the context of the COVID-19.

This research intends to shed light on the challenges and new experiences for tourism in LAC, by collecting original data and undertaking the systematization of available information, generating references from information tailored for this research while proposing pertinent solutions for our region. Our findings serve as a framework to understand the situation of tourism and nation brands in LAC and their possible futures, in the context of global trends and local needs.

Based on quantitative and qualitative data generated for our study, we propose different routes to strengthen a sector that should draw more consistently on creative industries and digital technologies. We stress the potential of what we call *creative-digital tourism*, as a field for innovation, social and urban transformation, economic development, creation of new cultural experiences, and reaffirmation of national identity in a global scenario of competition and collaboration.

<sup>1</sup> Inter-American Development Bank, *Vision 2025, Reinvest in the Americas: A decade of opportunity*, (Washington DC: IDB, 2021).

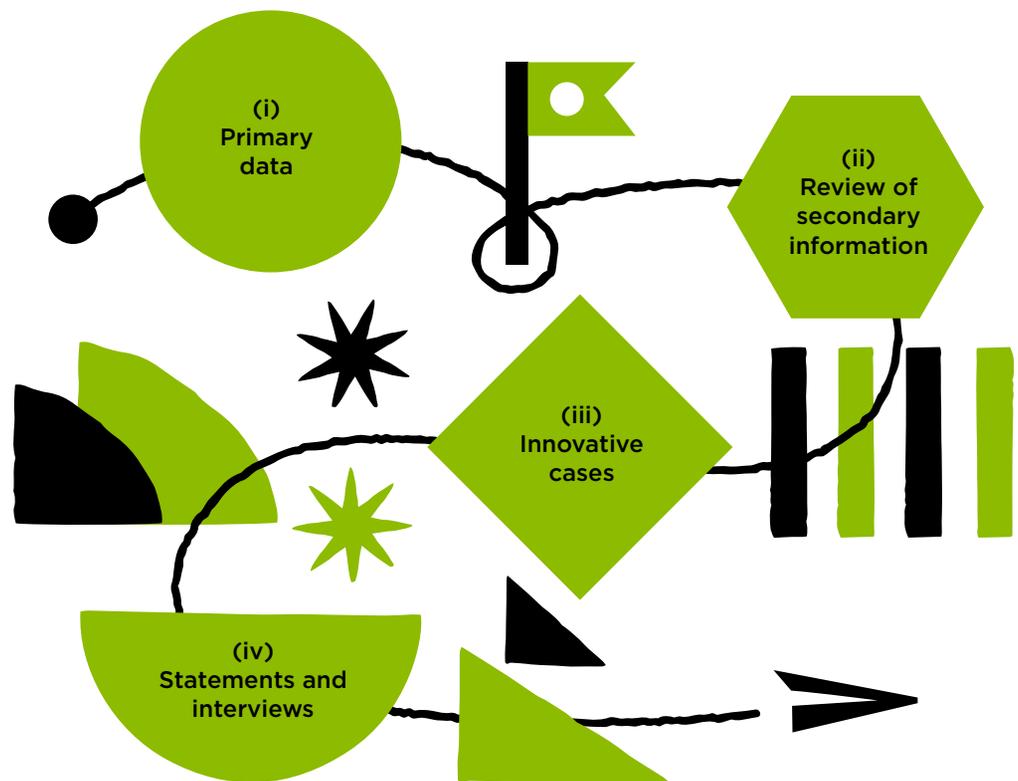
*Tourism and nation branding: trends and digital strategies*, is part of the IDB's editorial series, *Art, Culture, and New Technologies in Latin America and the Caribbean*. It points out the impact of digitization, the adoption of technologies through cultural and creative industries from the region, and how they can catalyze innovation, social cohesion, and change.

This volume is organized in four chapters. In the first chapter, we discuss the possible collaborations and conjoint opportunities between tourism and cultural and creative industries (CCI), while mapping the footprints and challenges brought by the pandemic to this sector. In the second chapter we explore five key strategies to cope with the global context, underlying the relevance of CCIs and new technologies, including a “digital route” of tourism that tracks down major opportunities. The third chapter presents several cases of innovation—from the public and private sectors—that have aimed at strengthening and renewing tourism and nation brands, drawing on creative economy and new technologies. Lastly, we share thoughts and suggestions to open new lines of action.

This volume is intended for stakeholders from local and federal tourism institutions, CCIs and nation branding professionals in the public sector. But it also targets investors, entrepreneurs and private operators in the tourism and culture sector, as well as researchers interested in these topics.

## Methodology

This publication was generated from **(i) primary information**, through a qualitative study of in-depth interviews with nine key agents in the region and a quantitative study through telephone surveys to three hundred representatives of the tourism sector; **(ii) review of secondary information** such as global, regional, national, sector reports, and surveys; **(iii) innovative cases** in the field of tourism, nation branding and CCIs from LAC, as well as from North America, Europe and Asia; and **(iv) statements and interviews** with the participation of professionals from this sector, cultural officers and experts in creative economy. Throughout this volume, data from other studies is referenced in the critical apparatus. In the interest of not being repetitive, whenever no reference is assigned to support the information, it should be assumed that we are quoting our primary research.



# 1. Tourism and Nation Branding: Challenges and Opportunities

Each year, nation brands show a better understanding of the digital ecosystem, engaging in a dialogue that goes beyond marketing campaigns, launching valuable information that can be used by others. All this goes hand in hand with digital consumers that are evolving and consuming information in different ways. It is each nation branding team's responsibility that information from their countries and cities is verifiable, trustworthy, and comes from reliable sources.

—**Daniel Valverde**, Head of Costa Rica's Nation Branding



## Tourism, Culture, and Creativity: An Endless Relationship

The IDB has included tourism, tangible and intangible cultural heritage, in the “orange universe” umbrella concept, along with crafts, gastronomy, museums and galleries, natural parks and ecotourism, monuments, archaeological sites, and historic centers, as well as festivals, carnivals or traditional knowledge, among other areas with a high impact on the link between tourism, culture and creativity.<sup>2</sup>

To understand this connection we have considered three approaches. First, the most common approach applied by the World Tourism Organization (UNWTO), which focuses on “cultural tourism” centered behind the cultural *motivation* to visit certain destinations. (UNWTO).<sup>3</sup> Secondly, “creative tourism”, a concept promoted by researchers Greg Richards and Crispin Raymond, emphasizes the exploration and *active participation* of visitors involving creative, physically engaging, and even co-created experiences in cultural spaces hosted by local creators.<sup>4</sup> Third, UNESCO also employs the term “creative tourism”, which includes the creation of direct tourist experiences related to fields such as crafts, cinema, dance and dancing, design, photography, languages, literature, gastronomy, painting, theater, and the like.<sup>5</sup>

Having acquired a leading role in the local economy and social development, culture and tourism have an intrinsic relationship. Their

- 2 Inter-American Development Bank, *Orange Economy: Innovations you may not know were from Latin America and the Caribbean* (Washington D.C: IDB, 2017).
- 3 The UNWTO describes cultural tourism as “a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination.”. UNWTO, *UNWTO Tourism Definitions*, 2021, <https://www.e-unwto.org/doi/book/10.18111/9789284420858>.
- 4 For the authors this type of tourism “[enables] travelers to develop their creative potential by taking an active role in workshops or experiences common to each destination place”. Greg Richards y Crispin Raymond, “Creative Tourism”, *Atlas News*, 1(23), 2000. On tourism based on seminars or creative retreats see: “Crafty Breaks. 15 of the best creative retreats”, *The Guardian*, accessed June 2021, <https://www.theguardian.com/travel/2021/may/29/crafty-breaks-15-of-the-uks-best-creative-retreats>.
- 5 From this point of view, creative tourism seeks to “create touristic experiences related to handcrafts, cinema, dance, designing, photography, language, literature, gastronomy, painting, and theater. Creative tourism based on creativity as an action, is considered part of the next generation of tourism, due to its interactivity, that is, tourists leave their role as mere spectators to become protagonists of their own experience”. UNESCO, *El turismo cultural y creativo hoy*, 2021, <https://es.unesco.org/news/turismo-cultural-y-creativo-hoy>.

relevance in public policy, as well as in private, cultural, and, tourist management undertakings has increased. According to the UNWTO, cultural tourism accounts for 39% of the global tourism market, which translated into 516 million international visitors for cultural activities only during 2017. In addition, more than 90% of countries who are members of UNWTO have general or targeted policies addressing cultural tourism.<sup>6</sup>

Tourism and culture also have an impact in the construction of local identities and the perception of cities and countries, and, as a result, an impact in their global reputation, which is one of the fundamental cornerstones in nation branding: the hallmark image of countries in direct connection with tourism and culture. Nation brands are much more than a logo or a slogan: they are governing and soft power tools that define the way in which countries are perceived and managed at a national and international level, having culture as their foundation.

Efficient administration of nation brands has a direct positive effect on tourism and the reputation of countries. A solid cultural identity with a sustainable and dynamic creative ecosystem will boost both tourism and the potential for building and positioning nation brands. Conversely, poor management will have a negative impact on these areas. Disruptive events such as wars, disputes, natural disasters, or pandemics have a direct impact on a country's reputation, which is a powerful reason to revisit narratives and public strategies for the promotion and management of nation brands.

In LAC alone, there are more than 140 sites inscribed on the UNESCO World Heritage List, of which 96 are cultural (see Figure 1), including 50 historical downtowns reputed for their cultural, tangible, and intangible assets. In addition, up to 600 historical downtown areas in the region have been declared cultural and heritage assets, at a local level under national legislation.<sup>7</sup>

6 UNWTO, *Tourism and Culture Synergies*, 2018, <https://www.e-unwto.org/doi/book/10.18111/9789284418978>.

In Lac, some experiences and strategies about recent policy and planning on cultural tourism in Colombia are: <https://mincultura.gov.co/ministerio/politicas-culturales/de-turismo-cultural/Paginas/default.aspx>, and even more recently: <https://procolombia.co/actualidad/turismo-cultural-una-oferta-atractiva-y-responsable> accessed June 2022; For Chile see: <http://www.indap.gob.cl/docs/default-source/default-document-library/turismo-cultural-sernatur.pdf> accessed June 2021.

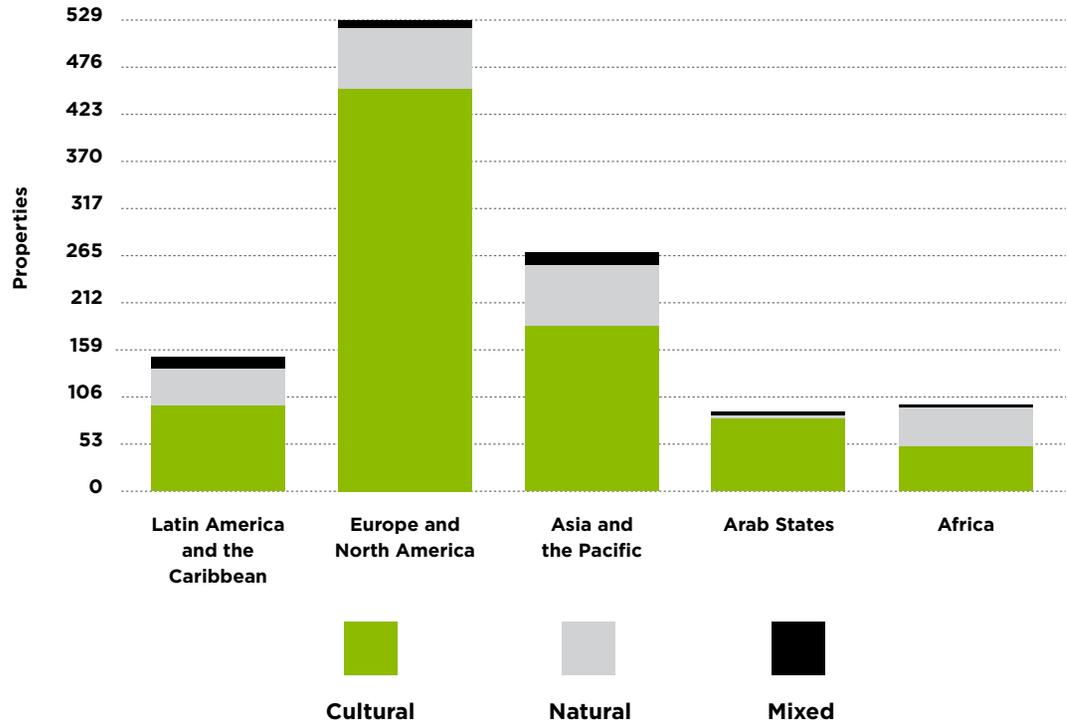
7 Rodrigo Caimanque et al., *Patrimonio Vivo*. Documento de enfoque, Banco Interamericano de Desarrollo, December 2020, <https://publications.iadb.org/es/patrimonio-vivo-documento-de-enfoque>

Cultural dynamism is key to the development of nation brands, for cities and countries alike. For instance, live cultural events that contribute to boosting nation brands such as fairs, carnivals, and contemporary festivals are part of the tourism calendar, achieving a key role in creating jobs and income for communities. In LAC, it is estimated that the carnival ecosystem produces an annual income of more than 124,000 million dollars.<sup>8</sup> In cities like Barranquilla, Oruro, Port of Spain, Puno, and Rio de Janeiro, carnivals are responsible for thousands of temporary and permanent yearly jobs for local artisans, musicians, costume makers, designers and choreographers, among other direct and indirect positions.

In Trinidad and Tobago, for example, the carnival draws more than 30,000 foreign visitors. In 2019, for this two-day event, visitor expenses reached almost 60 million dollars,<sup>9</sup> a remarkable figure for a country of less than a million and a half inhabitants and a GDP of 23,208 million dollars according to the World Bank.<sup>10</sup> In addition, it is estimated that in 2012 the carnival generated 600 full-time qualified jobs,<sup>11</sup> a more significant fact considering the 668,956 inhabitants that represent the economically active population of the country.<sup>12</sup>

- 8 Daniela Peña Lazaro, “Más allá de la celebración, el carnaval genera riqueza”, Banco Interamericano de Desarrollo, accessed June 2021, <https://www.iadb.org/es/mejorandovidas/mas-alla-de-la-celebracion-el-carnaval-genera-riqueza&sa=D&source=docs&ust=1642793230820300&usg=AOvVawOTJ-Qxj759H1wZuKZ21msp>
- 9 “An orange future for tourism in small island developing states”, *Medium*, consultado en mayo de 2021, <https://medium.com/@riadmeddeb/an-orange-future-for-tourism-in-small-island-developing-states-a07cc1a3cb1e>
- 10 Banco Mundial, <https://datos.bancomundial.org/indicador/NY.GDP.MKTP.CD?end=2020&locations=TT&start=1961&view=chart>
- 11 Vanus Invested Limited, The Carnival Music Industry (Annex IV). Prepared for the National Carnival Commission of Trinidad and Tobago, Tunapuna, 2014.
- 12 Banco Mundial, <https://datos.bancomundial.org/indicador/SL.TLF.TOTL.IN?locations=TT>.

Figure 1: UNESCO World Heritage Sites, by Region<sup>13</sup>



In France, tourism based on festivals, live concerts, galleries, and museums, yields 3,000 million dollars per year. In the United States, the South by SouthWest music festival in Austin, Texas, drew more than 75,000 people from 102 countries in 2018. Resulting in hotel occupation of up to 53,000 people, which in turn produced more than 350 million dollars for the local economy.<sup>14</sup> In Japan, the Comic Market, a four-day event, attracted 750,000 people in 2019.<sup>15</sup> In the UK in 2014, it was estimated that there were 9 million international and domestic music-driven tourists, yielding £3.1 billion in direct and indirect consumption (around £4.2 billion dollars).<sup>16</sup> Finally, in Spain, 21.2% of the total trips made in 2020 for purpose of leisure, recreation or vacations were mainly motivated for cultural reasons, adding to more than 8 million trips, with a total associated consumption of more than 5,000 million euros, which is about 50% of the consumption the year before the pandemic.<sup>17</sup>

13 According to UNESCO data. See: <https://whc.unesco.org/en/list/stat>.

14 UNWTO, ProColombia and Sound Diplomacy, *Music is the New Gastronomy. White Paper on Music and Tourism* (Bogotá: ProColombia, 2018).

15 CISAC, *Cultural Times. The first global map of cultural and creative industries*, 2015, <http://www.cisac.org>.

16 UNWTO, ProColombia and Sound Diplomacy, op. cit., p. 86.

17 Ministerio de Cultura y Deporte, *Anuario de estadísticas culturales 2021. Turismo cultural*, Secretaría General Técnica, noviembre 2021, <https://www.culturaydeporte.gob.es/dam/jcr:463043db-a54c-4d36-8cc4-90a04d512691/nota-resumen-turismo-cultural-2021.pdf>.

Today, the dialogue between culture, tourism, and technology has to deal with new scenarios. Social distancing due to COVID-19 has forced us to access and experience cultural and tourist goods and services from our home, depending on new technologies and digital supports. The subsequent reopening and the end of restrictions have brought hybrid solutions combining face-to-face and digital environments, as well as focusing on universal access for local and diverse audiences. At the same time, it has imposed new barriers, especially due to a complex digital transition, both for private and public actors and for consumers themselves.

The digitization and reinvention of supply and demand, management and customer service processes were already on their way. 59% of the respondents in our survey stated that, prior to the pandemic, they were planning to develop or acquire new technologies to empower and foster the development of their organizations, considering mainly the most “traditional” items: websites (41%) and social networks (36%). On the other hand, 25% of the respondents admitted that their organization had regular, poor, or very poor technological infrastructure before the onset of the pandemic, while 40% considered that the infrastructure to promote the use of new technologies was insufficient or non-existent. 71% indicated that this new context required additional technological tools and platforms. In addition, respondents identified the top three technological disadvantages prior to the pandemic: (i) financing problems (30%); (ii) problems in accessing and using the technology by their audience (17%), and (iii) lack of training and skills by the staff (17%).<sup>18</sup>

The pandemic disrupted these processes, and in general, upended global and local tourism. The digital urge and digital transformation are far from being consistent, and have followed a very uneven road, both considering the access and development of digital skills from staff and audience, and even innovative awareness, among other variables. The context in LAC has increasingly underlined the need for digital innovation, in the face of insufficient or inadequate infrastructure for the promotion and adoption of new technologies. The region offers major and undeniable opportunities considering the potential of its culture. Creative economy can aid in managing tourism and nation brands, reimagining destinations and taking those typically related to tourism into a new model of cultural offering, focusing on social awareness and sustainable innovation in the sector.

<sup>18</sup> According to research conducted by UNESCO, global experts signaled out the use of new technologies in cultural tourism as one of the major challenges in the field as to strengthen the collaboration between tourism and culture (37%), while 35% of the respondents highlighted the need to increase dialogue between stakeholders in the culture and tourism field. UNWTO, *Tourism and Culture Synergies*, p. 61.

## The Traces of COVID-19 in Tourism and Nation Branding

The UNWTO estimated a global drop of 74%, in international tourism in 2020 compared to 2019.<sup>19</sup> In the cultural sector, it was estimated that by June 2020 more than 83% of cultural spaces were being affected by general cancellation of activities or events, while 52% of the companies surveyed registered losses on sales of more than 80% during this cancellation period.<sup>20</sup> The performing arts, cultural fairs and festivals, museums, historical heritage sites, and other sectors that depended on the influx of visitors, have been the most afflicted.

This impact is even more dramatic if we consider that in LAC international tourism represents more than 20% of total tourism, as in the cases of Argentina (21%), Uruguay (22%), Ecuador (22%), Mexico (27%) and Chile (39%), among others.<sup>21</sup> This is exacerbated when we realize that entire cities and local economies such as Cusco, in Peru, or city-destinations such as Kingston, in Jamaica, or Santo Domingo, in the Dominican Republic, depend to a great extent on national and international tourism. In the case of the first two aforementioned cities, international travelers represented more than 60% of the total number of tourists, before the pandemic.

In 2020 international tourist arrivals throughout the Americas plunged by around 69% compared to 2019: in South America, by 72%; in Central America, by 72%; in North America, by 68%, and in the Caribbean, by 61%.<sup>22</sup> The situation is even worse in countries like Peru or Chile, where a

19 According to UNWTO, global tourist arrivals (overnight visitors) saw a drop of 74% between January and February 2020, when compared to 2019. This meant, in absolute numbers, a reduction of one billion international tourist arrivals. Economically, this represents a loss of US \$1.1 billion in tourist income, more than 10 times the loss registered in 2009 as a result of the global economic crisis, which meant the last great crisis for the sector. Based on these data, the UNWTO considers that, in the year 2020, international tourism fell back to 1990 figures. In economic terms, this is equivalent to an estimated loss of global GDP of over US\$2 trillion (more than 2% of world GDP) and has put close to 120 million direct jobs in the sector at risk. UNWTO, *UNWTO Tourism Data Dashboard*, 2020, <https://www.unwto.org/unwto-tourism-dashboard>.

20 Matías Triguboff, et al., *Evaluación del impacto de la COVID-19 en las Industrias Culturales y Creativas. Una iniciativa conjunta de MERCOSUR, UNESCO, BID, SEGIB y OEI* (Paris: UNESCO Publishing, 2021). <https://unesdoc.unesco.org/ark:/48223/pf0000380185>.

21 UNWTO, *Análisis del año 2020*, 2020, <https://www.unwto.org/es/COVID-19-y-sector-turistico-2020>.

22 UNWTO, *UNWTO Tourism Data Dashboard*, 2020, <https://www.unwto.org/unwto-tourism-dashboard>.

reduction of more than 70%, compared to 2019 was experienced; while Mexico and Uruguay saw a drop of 46.2% and 55% respectively.

Table 1. **Number of international arrivals (in millions), Latin America and the rest of the world. (2019 vs 2020)**<sup>23</sup>

Million people	International tourist arrivals		
	2019	YTD 2021*	Est. 2021
Mexico	45,024	-29%	31,967
Argentina	7,399	-96.0%	296
Chile	4,518	-96.0%	181
Peru	4,372	-90.0%	437
Colombia	4,154	-50.0%	2,077
Costa Rica	3,139	-57.0%	1,350
Uruguay**	3,056	-55.0%	1,375
Brazil***	6,353	-66.0%	2,160
Dominican Republic	6,446	-23.0%	4,963

Top 10 / Million people****	International tourist arrivals		
	2019	YTD 2022*	Est. 2022
France <sup>2</sup>	89.4	-51.0%	43.8
Spain	83.5	-41.0%	49.3
United States	79.3	-50.0%	39.7
China	65.7	-90.0%	6.6
Italy	64.5	-49.0%	32.9
Turkey	51.2	-16.0%	43.0
Mexico	45.0	-24.0%	34.2
Thailand	39.8	-96.0%	1.6
Germany	39.6	-66.0%	13.5
United Kingdom	39.4	-92.0%	3.2

UNWTO data

<sup>1</sup> From 2019 to 29 Mar 2022

<sup>2</sup> Data from France 2019 corresponds to 2018, the rest of the data corresponds to 2021

\*Variation vs 2019 preliminary data

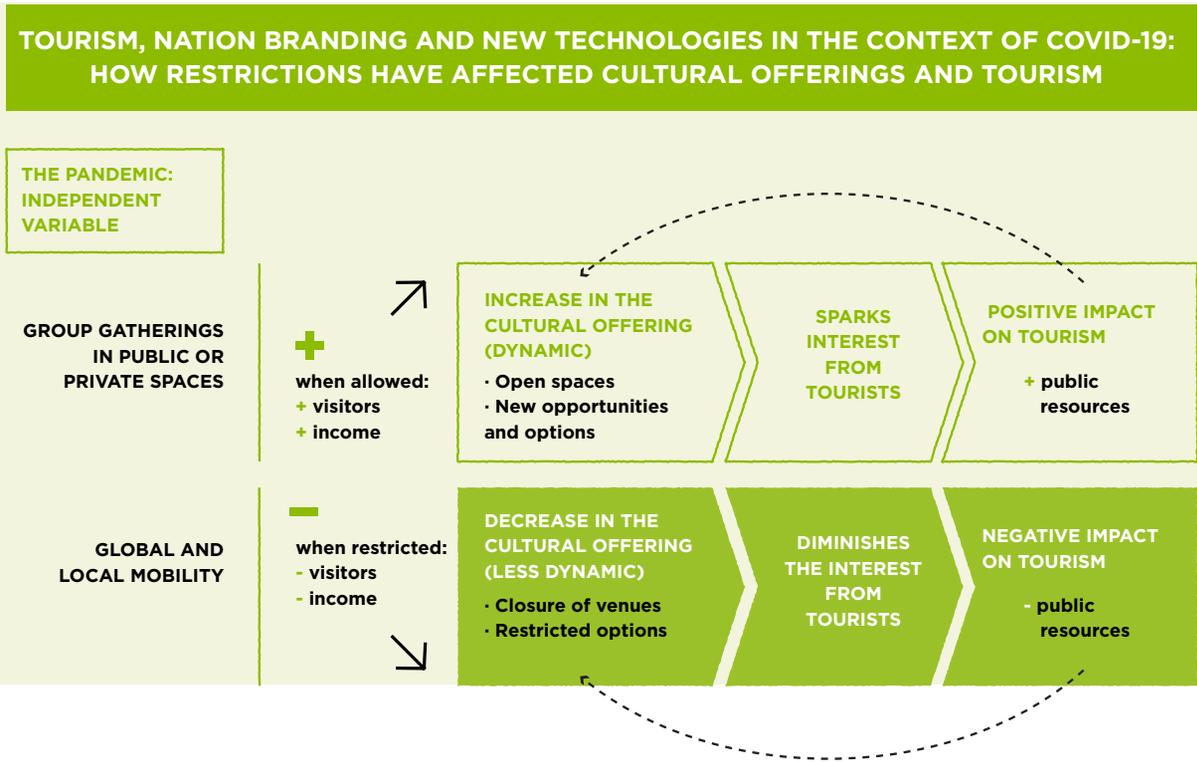
\*\* Uruguay data from 2021 is from 2020

\*\*\*Brazil data from 2020 is from 2020

\*\*\*\*Data from the United Kingdom, China, Germany, France, and Italy 2022 is from 2021

This situation has direct consequences on public resources and how they are used in public cultural promotion. In Peru, for example, income loss resulted in a drastic reduction in public resources, since a part of its funding is based on taxation directly related to tourism, such as taxes on air transport or entrance fees to natural and archaeological sites. Public jobs and other projects related to tourism entrepreneurship depended on this budget, creating serious downsizing in the tourism and culture fields.<sup>24</sup>

Graph 2. **Tourism and cultural offer during COVID-19: vicious and virtuous circles**<sup>25</sup>



Restrictions on mobility and the general feeling of uneasiness not only have an economic impact, but they also entail social and psychological consequences, influencing people’s decisions on how they manage their spare time. This affects tourism, business, and investment plans; and above all, it has changed the global perception of some countries and cities, and with it, their respective nation brands.

According to Blooming Consulting (2020), 68% of stakeholders’ perceptions have changed based on how different countries dealt with the

<sup>24</sup> Guillermo Cortés Carcelén (Former Vicepresident of Tourism and consultant at PromPerú, Ministerio de Turismo y Comercio Exterior del Perú) interview by Félix Lossio and Natalia Ames, January 14, 2021.

<sup>25</sup> Prepared by the author.

pandemic. 95% of them admitted to making positive or negative associations regarding the reputation of a country and its brand, by evaluating how they managed the health crisis (effective and timely measures, number of cases, and others). While 55% of respondents stated that the crisis management strategies had damaged the image of some countries.<sup>26</sup>

There is an inevitable connection between how governments handled the pandemic and the perception of nation brands. For this reason, recovery of tourism and nation brands is linked to the implementation of public health policy and safety measures, as well as business models taking these unavoidable variables into account. In countries where the spread of the virus has been massive, their image has been associated with negative values or, in general, with mistrust, affecting their global reputation. On the other hand, countries that have managed to control the virus have gained worldwide recognition and will probably have a foundation to strengthen their prestige in relation to tourism, investment and their global image.

26 Bloom Consulting, "COVID-19: The Impact on Tourist Behaviors", *Bloom Consulting Journal*, 2020, p.13, <https://www.bloom-consulting.com/journal/the-COVID-19-study-the-impact-on-nation-brands/>.

# 2. Rethinking Tourism and Nation Brands: Five Keys to Transition from the Face-to-Face to the Digital World

The idea is to enhance companies throughout the value chain, but particularly in the digital aspect. It is an important leap that must be taken.

—**Guillermo Cortés Carcelén**, Former Deputy Minister and consultant for the Ministry of Tourism and Foreign Trade of Peru



We propose the term *creative-digital tourism* to understand the challenges that the sector faces today. We have considered a series of hybrid possibilities between face-to-face and digital aspects for tourism, affecting what we call “the four routes of the traveler”:

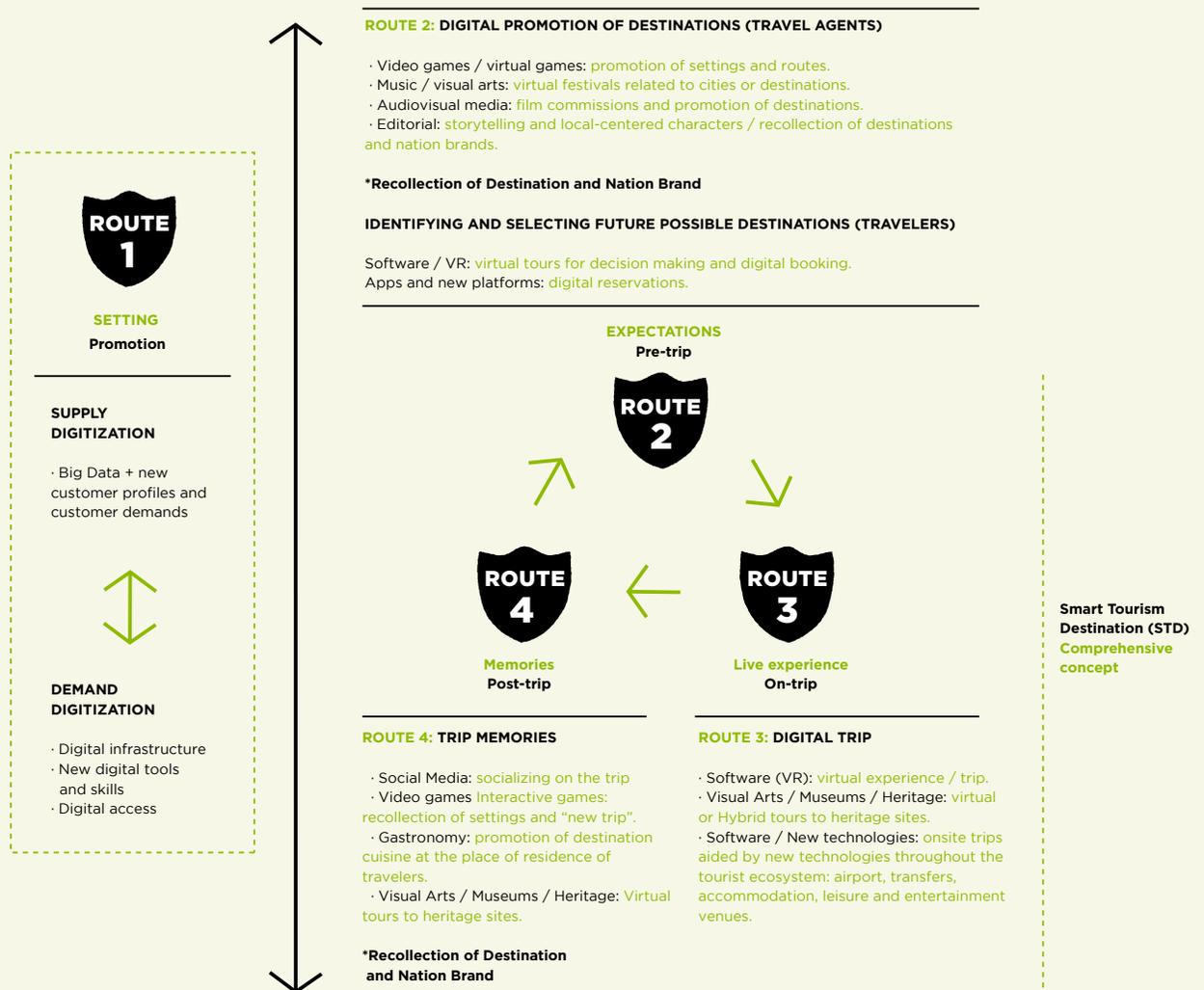
**ROUTE 1:** Use of Big Data, Market Intelligence + Digitization of tourism offering and the demand to identify new customer profiles and enhance digital infrastructure within destinations.

**ROUTE 2:** Promotion of tourism that uses technology, creative industries, and social media to create the desire to travel and concrete bookings.

**ROUTE 3:** Live experiences, virtual tours, on site or hybrid tours with new technologies, in partnership with the creative industries.

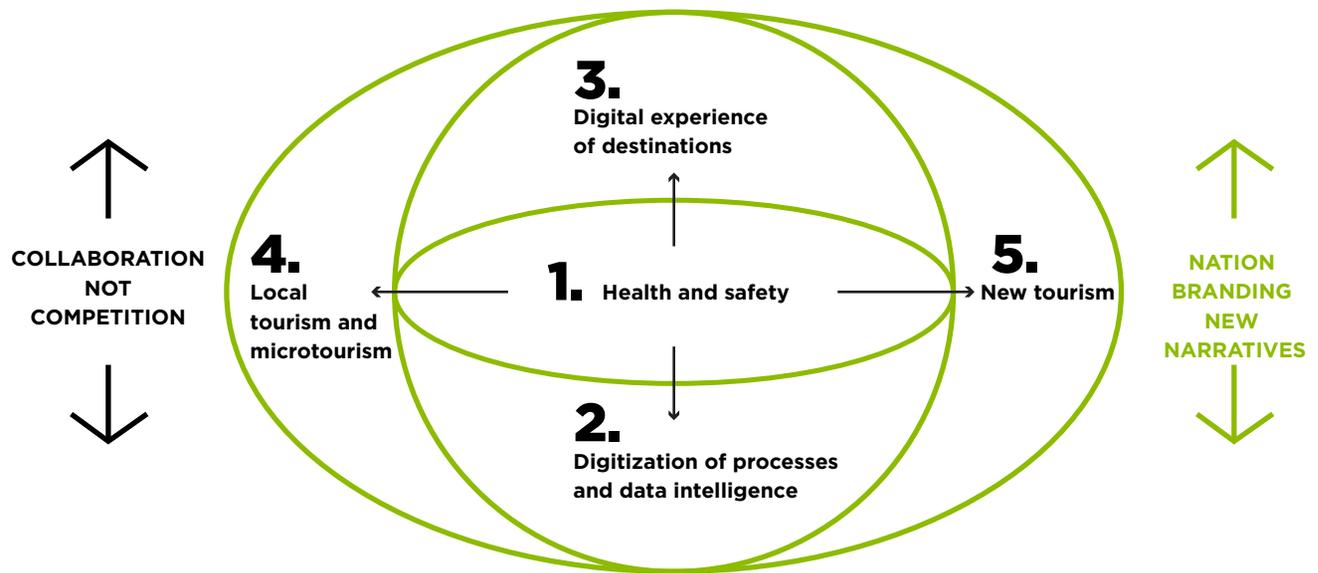
**ROUTE 4:** Creating memories and posting trip experiences on social media.

**Graph 3. The route for creative-digital tourism<sup>27</sup>**



These four routes or moments of the trip have a *creative* potential, counting on contributions from other cultural fields. They can also be enhanced *digitally*, when taking into account the tools and opportunities offered by new technologies. The goal is to reimagine the experience of traveling as a whole, while opening up new possibilities for tourism management, promotion, and consumption from the standpoint of digital technologies and creative industries. Bearing this in mind, we identify five key aspects when analyzing the challenges and opportunities offered by the intersection between tourism and nation branding, digital technologies, and creative industries.

Figure 4. **Five key points to promote digital creative tourism**<sup>28</sup>

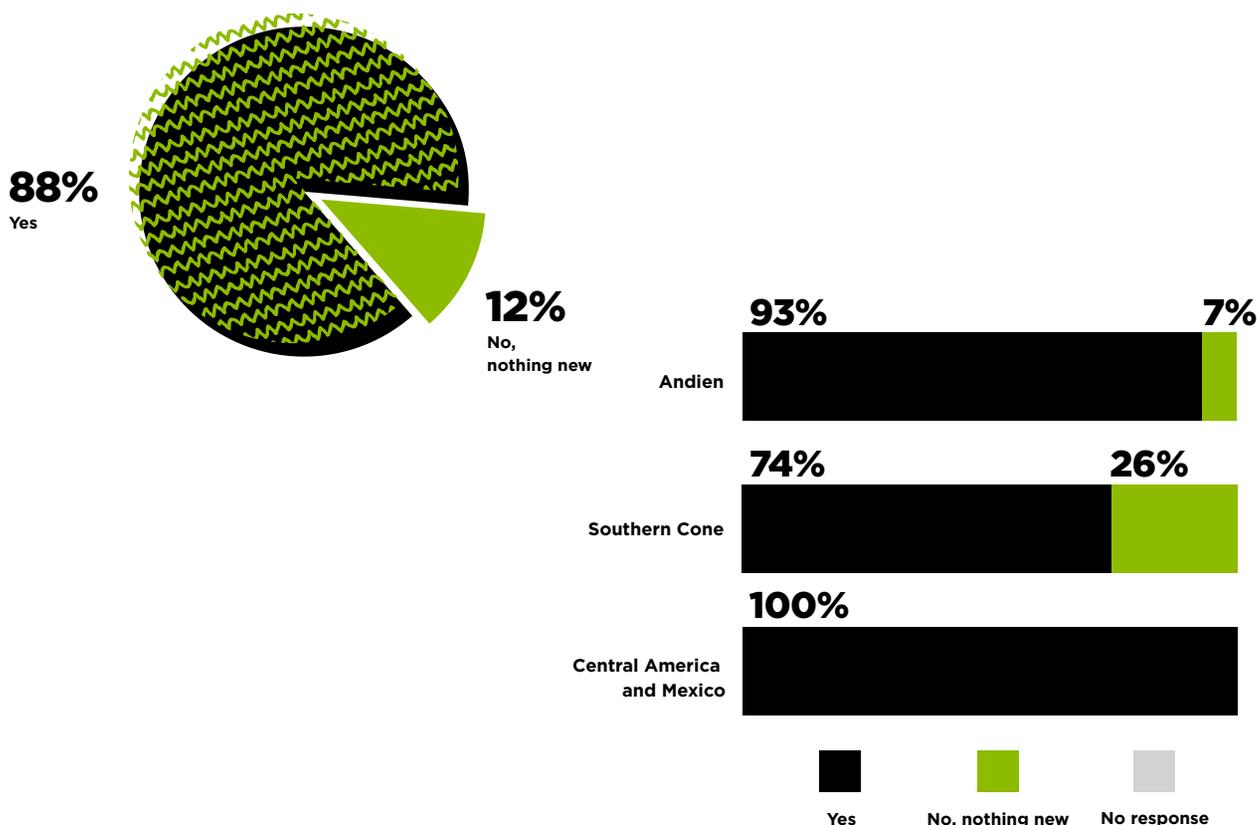


### First key: Health, Trustworthiness, and Personal Safety

Health, trustworthiness, and personal safety are at the center of the new challenges presented for tourism and nation branding.

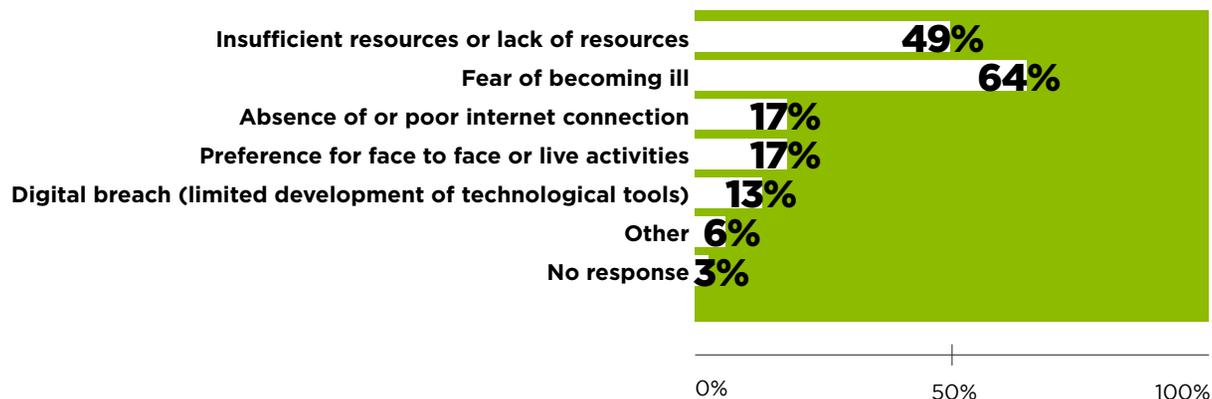
In light of a holistic approach to sustainability and personal safety,<sup>29</sup> health protocols and assurance of safety, trustworthiness and reputation have become crucial for any policy or strategy on tourism promotion or nation branding<sup>30</sup>. This has already been put into practice. 88% of the respondents stated that they have enforced health and safety protocols in their organization, destination, or event (table 2), while 64% signaled fear of contagion as the main obstacle hindering tourism (table 3).

Table 2. **Health and safety protocols**



<sup>29</sup> UNESCO (2021) and UNWTO (2016) propose two major objectives regarding cultural tourism: “being responsible, inclusive and sustainable, contributing to social and economic development of local communities and improving their well-ness, while enhancing and preserving cultural identity of destinations, promoting transcultural interchange between visitors and hosting communities, as well as fostering and preserving their cultural heritage”. UNESCO, “Turismo cultural y creativo hoy”, consultado en mayo de 2021, <https://es.unesco.org/news/turismo-cultural-y-creativo-hoy>.

<sup>30</sup> As stated in *Visión 2025* by IDB, one of the priority actions to foster economic recovery in LAC during the next decade has to do with strengthening public health systems, increasing their testing and monitoring resources, as well as granting fast and universal access to vaccines. Inter-American Development Bank (2021), *Vision 2025*.

Table 3. **Main obstacles for audiences or clientele**

In public and private tourism management, health ministries and health institutions, health policies and, in general, the coordination of private and public actors in the health field have taken a leading role. Even if in the past, these actors did not take part in the negotiations for development and guidelines of tourism (or if they did by accident), today their importance has become preeminent for the sustainability of the field.<sup>31</sup> Rodolfo Milesi, expert in nation branding in Latin America, remarks how in the current race to attract tourism and investment, guaranteeing health safety, and not just conventional tourist attractions, has become crucial. For this reason, discourse and strategies on nation branding have begun to involve public health officers, in order to communicate a sense of protection to potential visitors.<sup>32</sup>

Artists and cultural workers can contribute and take an active role in the dissemination and implementation of health protocols, as well as in adapting spaces, or even in building new narratives about cities and countries.<sup>33</sup> The work of screenwriters, writers, visual artists, graphic designers, and digital animators will be crucial to carry out prevention campaigns and designing signage for public spaces.

<sup>31</sup> See: Zeldovich, 2020.

<sup>32</sup> Rodolfo Milesi (founder and director at Branding Latin America Consultancy) interview by Félix Lossio and Natalia Ames, January 23, 2021.

<sup>33</sup> Even at the urban planification stage, architects and visual artists play a leading role. Urban sociologist Richard Sennet has said that considering the pandemic context it is worth reviewing the “fifteen-minutes cities” concept, that refers to the ability to go by foot, or on bicycle, from working to commercial areas, avoiding long distances, and spending a lot of time in crossing the city. Marta Rodríguez Martínez, “Las ciudades post-coronavirus: así va a transformar la pandemia el diseño urbano”, *Euronews*, accessed June 2021, <https://es.euronews.com/2020/05/01/las-ciudades-post-coronavirus-asi-va-ha-transformar-la-pandemia-el-diseno-urbano>.

In Mexico, the government launched the superheroine “Susana Distancia”, a character who communicates prevention measures in a friendly way.<sup>34</sup> In Uruguay, health-related scientific values were associated with Uruguay’s nation branding discourse, as well as with some of its sub-brands like Uruguay Audiovisual, through which the country was presented as a safe and valuable setting for filming and advertising productions.<sup>35</sup> In Colombia, touchless technology and other protocols preventing agglomeration at El Dorado Airport have been enforced. Gilberto Salcedo, vice president of ProColombia, states that improving the digital infrastructure in natural and remote destinations, far from urban agglomeration centers, has become a priority.<sup>36</sup> In Costa Rica nation brand *Esencial Costa Rica* has focused on values related to the protection and care of nature, as well as the well-being of its citizens, even before the pandemic. In 2020 specific characteristics of the country, like its health system and progress in terms of social indicators, were highlighted as part of the nation branding discourse to strengthen its competitive reputation. All these examples require a solid public health system, committed to disseminating clear protocols in order to assure safety and well-being to attract tourists and investors in new or adapted destinations.

Thus, nation brands have the opportunity to promote tourism and trade while publicizing all the initiatives carried out around the health crisis. As Uriel Naum points out: “At times like these, the goals of a nation brand grow in relevance, as long as the narrative and the context are empathic by addressing the audience’s needs, focusing on each population”.<sup>37</sup>

For example, the One Planet Sustainable Tourism Programme, launched by UNWTO in June 2020 aims at the responsible and sustainable recovery of the sector, and at being better prepared for future crises.<sup>38</sup> It proposes six lines of action: public health, social inclusion, biodiversity conservation, climate action, circular economy and public policies, and funding. All of them are closely related to the 2030

<sup>34</sup> “Coronavirus. Susana Distancia”, Gobierno Federal de México, accessed June 2021, <https://coronavirus.gob.mx/susana-distancia/>.

<sup>35</sup> Larissa Perdomo (manager of Uruguay Brand), interview by Félix Lossio and Natalia Ames, February 3, 2021.

<sup>36</sup> Gilberto Salcedo (vice president of Tourism at ProColombia), interview by Félix Lossio and Natalia Ames, February 24, 2021, video.

<sup>37</sup> Uriel Naum Avila, “Marca país: la estrategia que puede salvar a Latinoamérica”, *Forbes Centroamérica*, 2020, <https://forbescentroamerica.com/2020/11/19/marca-pais-la-estrategia-que-puede-salvar-a-latinoamerica/>.

<sup>38</sup> UNWTO, *Sustainability as the new normal: A vision for the future of Tourism*, 2020, <https://www.unwto.org/COVID-19-oneplanet-responsible-recover>.

Sustainable Development Goals (SDG) and other international agreements on climate change.

By placing health, trustworthiness, and safety front and center, the opportunities to promote sustainable tourism and develop nation brands based on values associated with the demands of a post-pandemic world have increased.

## Second Key: Digitization of Processes and Data Intelligence

The use of digital tools to rebuild and enhance tourism is key to the competitiveness of the sector.

One of the areas that relies the most on digital technologies is market intelligence, as a tool to know users' demands, potential or foreign investors, while predicting trends on purchasing and decision making about tourist destinations. This is key to understanding audiences and how their interests, motivations, and concerns have changed.

Online digital platforms have the ability to increase global GDP by improving productivity, fostering employment, and increasing labor market participation.<sup>39</sup>

A clear example in the tourism sector is online travel reservations, which by the end of 2020 were responsible for half of the total reservations that year, while 83% of international travelers used their mobile phones to find and purchase trips, as well as to share them on social networks.<sup>40</sup>

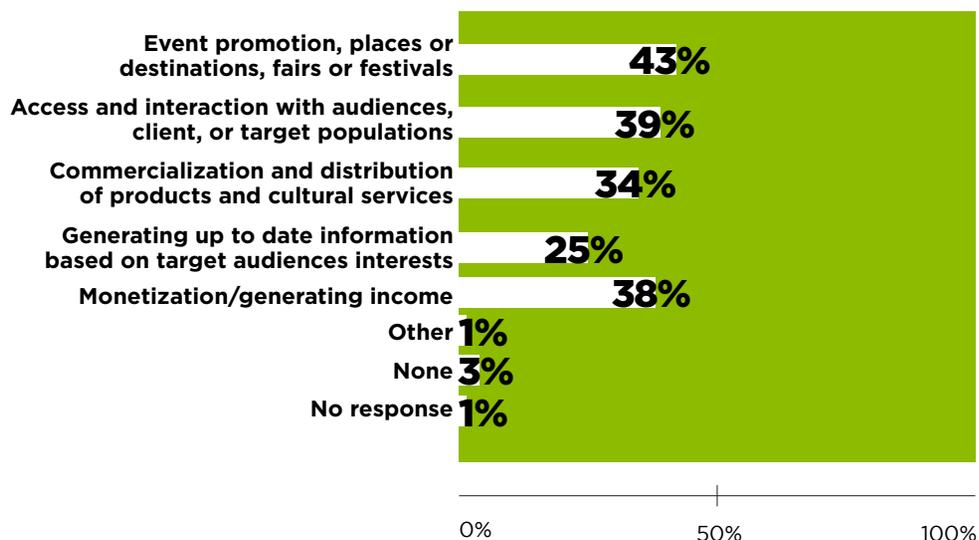
For digital technologies to achieve a disruptive role in the development of tourism, it will be necessary to tackle present shortcomings. Among them are: (i) poor digital infrastructure at destinations and from tour operators themselves (regarding connectivity, universal access, and available equipment); (ii) lack of digital skills of stakeholders, and (iii) deficit in the creation and complete transformation of destinations through the use of new technologies. According to our survey, 43% of respondents saw the promotion and dissemination of events, places, destinations, or

<sup>39</sup> According to the IDB, 540 million people would benefit from online jobs by the year 2025. On the other hand, Garcia Zaballos and Lopez-Rivas (2012) have estimated that a 10% growth in broadband penetration will bring forth a 3% growth in the GDP and a 2% increase in productivity (IDB, 2021: p. 6). Inter-American Development Bank, Vision 2025.

<sup>40</sup> Statista, "Online travel market - statistics & facts". Issued December 22, 2021. <https://www.statista.com/topics/2704/online-travel-market/>.

other events such as fairs or festivals as the most restricted service due to poor technology options; while 39% of them considered the access and interaction with users, customers or target audiences the most limited service due to technological deficits (table 4).

Table 4. **Limited products or services due to lack of technology**



A paradigmatic example is that of Chile, in which three public entities –the Subsecretariat of Tourism, the National Tourism Service, and the Chamber of Production Development– developed the Transforma Turismo strategic program.<sup>41</sup> The program identified that although the country has good connectivity and a high number of national internet users, only 42% of tourism companies had a website in 2018, and 79% of them were not making online sales.<sup>42</sup> The program developed different strategies to enhance digital skills of Chilean tourism entrepreneurs, especially while preparing for reactivation.

Among these actions are: online training for tourism entrepreneurs through the SIGO Tourism Technology courses; the Conecta Turismo platform which connected tourism companies and providers of technology and digital solutions; the coordination with public and private institutions to improve connectivity and digital infrastructure in designated regions of the country to bridge the digital gap; and technical assistance for SMEs to apply digital tools and increase their productivity through the Digitize Tourism initiative. Launched in 2020, 700 companies from

<sup>41</sup> Transforma Turismo, official website, <https://www.transformaturismo.cl/>.

<sup>42</sup> CORFO, “Lineamientos estratégicos para la innovación y transformación digital del turismo en Chile”, 2020, <http://www.subturismo.gob.cl/wp-content/uploads/2020/07/1M-TRANSF-DIG-4MAYO2020.pdf>.

10 different regions benefited from the program that same year, while in 2021 a similar number of training sessions was planned, including 300 full scholarships for companies in targeted regions.<sup>43</sup>

Travel-related searches have changed in the wake of the pandemic. They can be monitored through the analysis of the level of satisfaction, the travelers' profile, and other variables such as the *travel sentiment*. This measures the evaluation and decision processes of tourists, tracking their initial stage of curiosity for a destination and showing patterns of positive, negative, or neutral behavior and reactions towards specific aspects of a destination.<sup>44</sup>

Given the unpredictability of new outbreaks, border closures and travel restrictions, as well as the need to comply with health and biosafety protocols; market intelligence focusing on demand offers valuable insight on users and the new ways they decide on prioritizing and managing their trips, as well as the image they have of destinations and countries. The data from this type of analysis is organized into different variables like age segment, nationality, purchasing power, priorities, and preferences of destinations. Due to the stress and uncertainty brought by the pandemic, there is a growing demand for rest and relaxation experiences, over urban or multi-destination trips.<sup>45</sup>

For tourism entrepreneurs ready to go back to business, this useful information has materialized in initiatives seeking to share data with tourism service providers for better planning. An example is the Tourism Acceleration Programme, launched by UNWTO in partnership with Google, which uses data-driven market intelligence in training agency representatives and tourism ministries from specific regions (South Africa, United Arab Emirates, Egypt, and Saudi Arabia).<sup>46</sup>

<sup>43</sup> Ximena Baeza, Constanza Cea and Antonia Schneider (Nation Brand Chile), interview by Félix Lossio and Natalia Ames, March 17, 2021.

<sup>44</sup> This data is gathered by consulting companies, as well as big data from websites related to tourism like Expedia or search engines like Google, showing decisions and comparisons made by users when planning future stays.

<sup>45</sup> Expedia Group Media Solutions, "Traveler Sentiment & Influences 2020-2021", 2021, <https://info.advertising.expedia.com/traveler-sentiment-and-influences-research>.

Oliver Wyman, "Anticipating The Travel Recovery: Traveler sentiment survey", 2020, <https://www.oliverwyman.com/our-expertise/insights/2020/oct/anticipating-the-travel-recovery.html>.

Inmarsat Aviation, "Passenger Confidence Tracker", 2020, <https://www.inmarsat.com/en/insights/aviation/2020/increased-digitalisation-critical-to-rebuilding-passenger-confid.html>.

<sup>46</sup> UNWTO, "UNWTO and Google Host Tourism Acceleration Program in Middle East", 2020, <https://www.unwto.org/news/unwto-and-google-host-tourism-acceleration-program-in-middle-east>.

Another market intelligence initiative linking demand with supply is Turismo In,<sup>47</sup> a website supported by Promperú, which makes international reports and bulletins available to tourism companies, while also giving training on how to apply this data and plan tourist offerings using a better understanding of target audiences.

First used in Spain, “Smart Tourist Destination” (STOUD), is a key concept emphasizing the digital sphere when speaking about sustainable management of destinations and the traveler’s experience. STOUD may be defined as “an innovative tourist destination, with consolidated cutting-edge technological infrastructure which guarantees sustainable development in its land and is universally accessible, making easier the interaction and integration of the visitor with the environment and enhancing the quality of experience from visitors, while improving the well-being of its residents.”<sup>48</sup> The STOUD model has been replicated in cities such as Tequila and Medellín, which we will discuss further.

From the standpoint of nation branding, market intelligence and big data can render valuable information on the digital demand of a country, and its associated terms when searched for on the Internet. For example, the days following an international campaign, or the appearance in a global fair, or even major events with mediatic coverage, like the release of a related film. It might be necessary to measure the number of searches for the country and tickets to get there while assessing the place of origin of such searches with the aid of search engines like Google.

### **Third Key: the Digital Experience of Destinations**

Promoting destinations through immersive reality requires technical skills and qualified staff to keep tourists engaged with cultural and touristic offerings.

The ways in which citizens experience destinations, and the way decision makers and private and public actors manage them have been transformed, pointing towards great developing opportunities. The management and promotion of places, cities and countries require innovative ways to work in conjunction with the cultural and creative industries, to create what we have called “the digital experience of destinations” through using digital technologies.

<sup>47</sup> “Turismo In”, PromPerú, accessed February 2021, <https://www.promperu.gob.pe/TurismoIN/>.

<sup>48</sup> SEGITTUR, “Destinos turísticos inteligentes”, <https://www.segittur.es/destinos-turisticos-inteligentes/>.

Globally, there is a great opportunity to manage and create hyperreal simulated experiences —or to create new ways of experiencing reality through the use of technology.

The results of our quantitative study suggest growth, although it was relatively low for new technologies. While 65% of respondents state using exclusively technological tools already existing prior to the health crisis, 29% of them admit to having developed tailored-technological products in the wake of the pandemic (table 5).

Table 5. **Use and development of technologies during lockdown**



The growth refers mainly to the use of traditional platforms or tools, rather than others of greater complexity. Particularly, the use of social networks (tables 6 and 7) has increased, especially for platforms like Facebook and Instagram (60% before, 67% after); more mobile applications have been created (7% before, 13% after); and online streaming of artistic and cultural events has grown (5% before, 10% after). Other advanced digital tools did not experience major changes. For instance, tours grew 2%, QR code integration grew 2% but neither virtual tours (18%) nor podcasts (6%) showed any change.

Table 6. **Technological development before COVID-19**

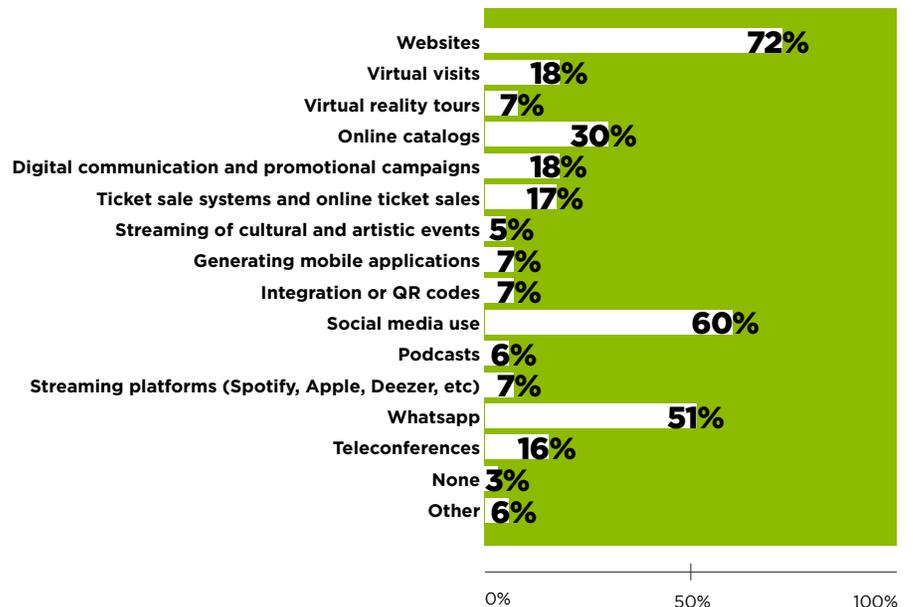
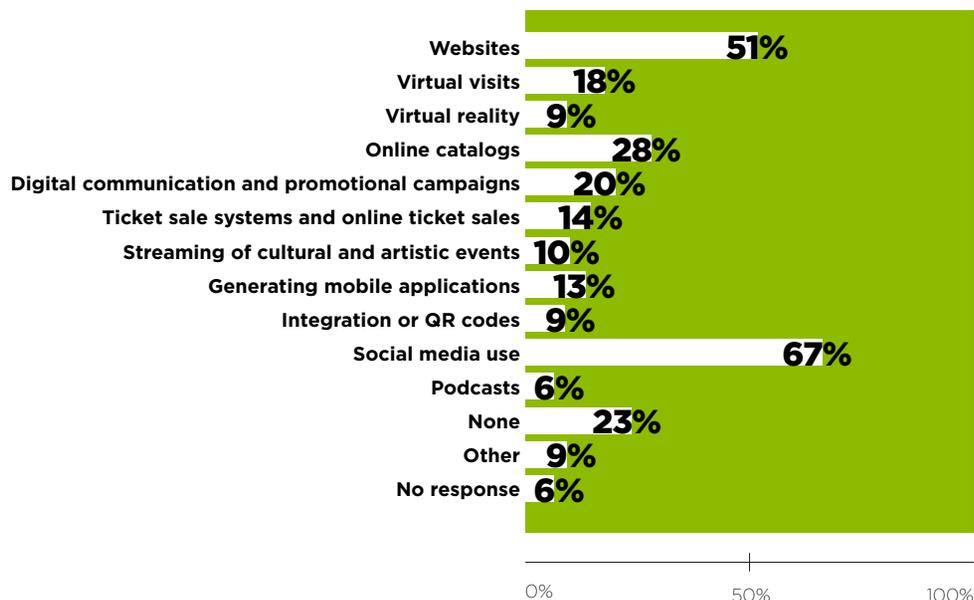
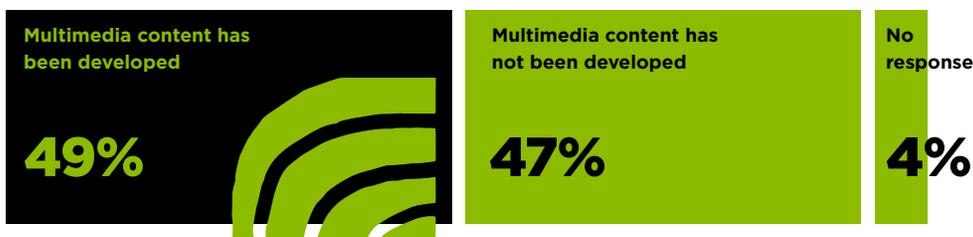


Table 7. **Technological development during COVID-19**



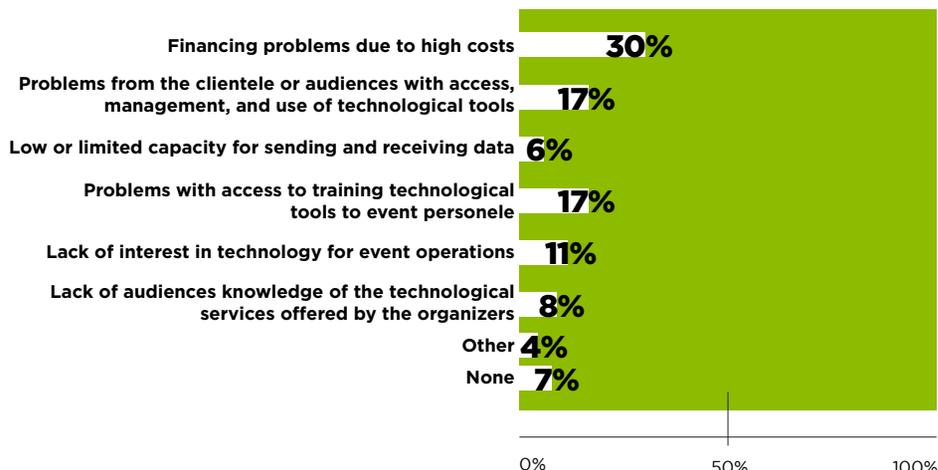
Widespread use of digital technologies and digital platforms does not entail innovation (tables 2, 3 and 4). Rather than broadly fostering creation of new technological tools, scarcely explored in the past (QR codes, podcasts, virtual reality tours), the pandemic has not created a substantial change, with the only exception being streaming and launching of mobile apps and multimedia content (49%) (table 8).

Table 8. **Creation of multimedia content**



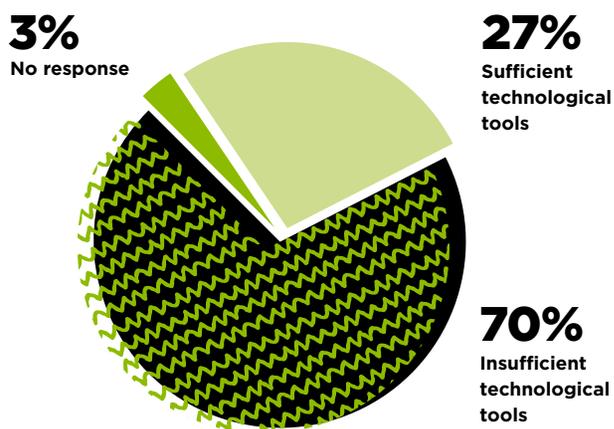
Regarding shortcomings in the development and implementation of technologies, only 30% of respondents considered that the technological tools they had prior to the pandemic allowed them to satisfy all their clients' needs. Among the main technological disadvantages stated are financing (30%), trouble accessing and using these technologies experienced by audiences (17%), and lack of skills and training from staff (17%) (table 9).

Table 9. **Technological disadvantages prior to COVID-19**



70% of respondents considered that new technological tools or additional products should be developed (table 10) and users around the world confirm this point of view: according to *Year in Search* published by Google in 2020, global searches involving new technologies, applied to tourist visits or cultural spaces, were trending. Searches including terms like *virtual field trip* and *virtual museum tours*, multiplied between 10 and 20 times, especially after lockdown, in March 2020.

Table 10. **Need for new technological tools**



Lack of financing, poor staff skills and training, or inadequate infrastructure are structural weaknesses hindering the process of technological innovation for key services in the field (table 11). This situation hinders substantial actions such as the promotion of events and destinations, digital access and interaction with audiences, or marketing and distribution of services and products, among others (table 12).

Table 11. **Obstacles for technological innovation**

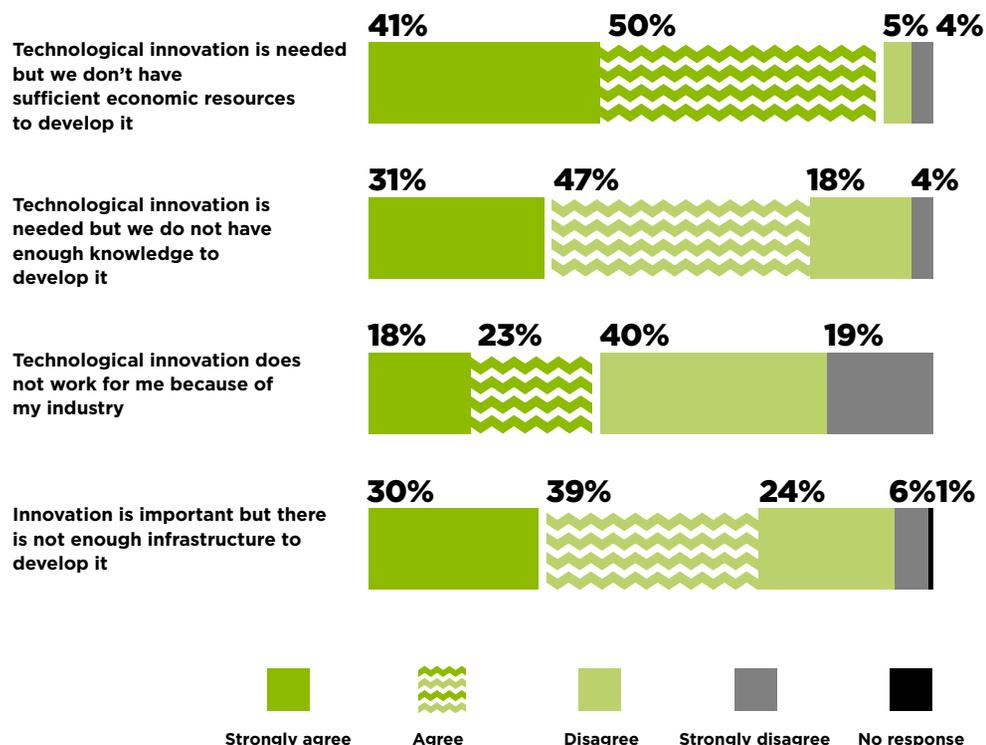
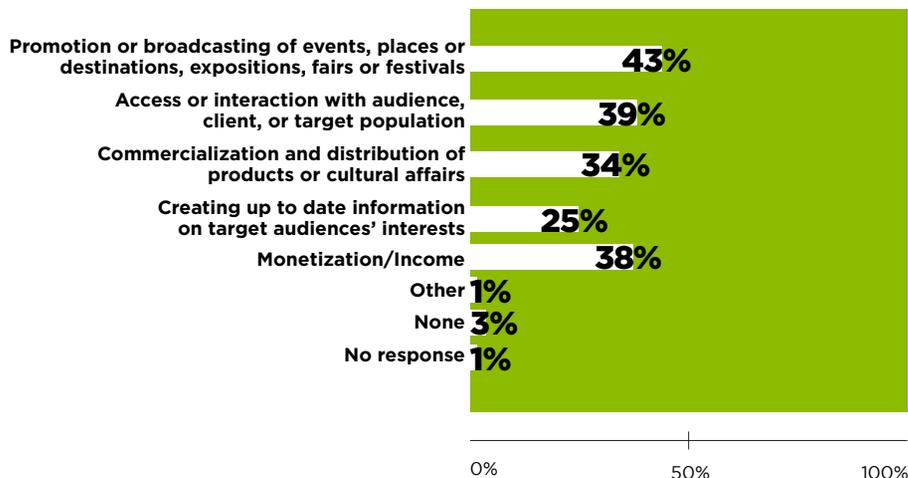


Table 12. **Limited products or services due to lack of technological options**



In any case, designing digital experiences based on unexplored experiences is a fundamental duty. According to 68 % of our respondents, virtual content should be “user-friendly and easy-to-understand for all audiences”, as well as “accessible”.

Pursuant to our “creative-digital tourism route”, by promoting and managing destinations and nation brands from the standpoint of digital

experiences, specific actions can be enhanced like disseminating information about destinations; carving the audience's imagination gaining predominance in "global memory, for future decisions of tourists and investors; and offering digital tours and digital experiences to generate immediate income to subsist. Some examples of these initiatives in LAC are:

- **Archaeological sites:** Virtual tours to sites such as Machu Picchu, based on private initiatives such as "Peru Foto 360",<sup>49</sup> or Oculus by Facebook, one of the most representative platforms in virtual tourism.<sup>50</sup>
- **Museums, galleries, and libraries:** Museum experiences such as the São Paulo Museum of Art - MASP, in partnership with Google Arts & Culture,<sup>51</sup> or museums managed by the BBVA Foundation in Peru, such as the Museum of Pre-Columbian Art in Cusco.<sup>52</sup>
- **Natural parks and ecotourism:** Tours to natural sites and reserves such as the Iguazú Falls,<sup>53</sup> the Costa Rican jungle, or the Galapagos Islands, using the YouTube Virtual Reality device in partnership with the BBC<sup>54</sup>.
- **Dance:** Virtual tourism on music and dance, such as virtual salsa lessons in Colombia, in association with private companies.<sup>55</sup>

Another way technologies and cultural and creative industries contribute to the promotion of destinations are video games or interactive games. Through depicting tourist landscapes and attractions, cities and countries become recognizable for new audiences.

49 Machu Picchu 360º, official website, <https://www.machupicchu360.com/>.

50 "Experience Machu Picchu in 'National Geographic Explore VR' on Oculus Quest", *Oculus Blog*, November 26, 2019, <https://www.oculus.com/blog/experience-machu-picchu-in-national-geographic-explore-vr-on-oculus-quest/>.

51 "Picture Gallery in Transformation", Google Arts & Culture, [https://artsandculture.google.com/exhibit/picture-gallery-in-transformation/BgJCD\\_ndqZAZL](https://artsandculture.google.com/exhibit/picture-gallery-in-transformation/BgJCD_ndqZAZL).  
To explore Virtual Reality in tourism, see: Chandler 2020 y Davies 2021.

52 MAP Tour virtual, official website, <https://www.fundacionbbvaperudigital.pe/tour-virtual/map-cusco/>.

53 360º videos, Air Pano, [https://www.airpano.com/360video\\_list.php](https://www.airpano.com/360video_list.php).

54 "Galapagos Islands in 360º", YouTube, <https://www.youtube.com/watch?v=A3x-MmcDOIZY>.

"YouTube VR", YouTube, accessed March 2021: <https://vr.youtube.com/>.

"Oculus Facebook", Facebook, accessed March 2021, <https://www.oculus.com/experiences/go/section/168408707194936/>.

55 These examples come from Mara Camila Corrales at the Vicepresidencia de Turismo de Colombia (in personal communication with the author).

Video games and gamification platforms allow gamers to build new and personalized virtual experiences using these settings as background while progressing their interactive itineraries, in a similar way as face-to-face tourists. Some video games alter some physical features of cities, allowing players to create their own tours, fostering interest, learning, and curiosity while adding authenticity to their experience as they navigate through recognizable landmarks and geographies.

The franchise *Assassin's Creed* is a successful example of the use of tourist destinations in video games. Situated in a historical past during the Middle Ages, in cities such as Florence, Jerusalem, Damascus, Paris or London, it presents the user with historical details about places, monuments, streets, and objects from these cities, in the context of an immersive experience. After the global success of *Assassin's Creed*, city governments in Florence or Venice, as well as private companies, offered to visit some of the settings recreated in the video game, drawing comparisons between the medieval times and the present day.

Correspondingly in Japan, video game settings are marketed to purposely create business opportunities for both tourist destinations and video game developers. An example is *Colony na Seikatsu Plus*, launched in alliance with a botanical park in Mimata. By purchasing merchandise at the parks' store, players can unlock access to the game and earn points, promoting the visit of gamers to the park, in a similar fashion to the *Pokémon Go* festivals in 2019, that took place in cities such as Chicago and Dortmund, and yielded a 247 million dollars in income related to tourism.

According to our survey, only 7% of the respondents have supported the design of video games tailored to their organization's needs. There is a growing video game industry in Latin America, which includes the development of games using regional settings,<sup>56</sup> as well as companies using 360° photography, micro-mapping or virtual reality to promote tourist destinations, and even emerging efforts that connect the e-sports industry with the tourism sector. Yet it still is a field that has not been explored sufficiently.

According to the latest study carried out by the consulting firm Newzoo, the video game industry obtained more than 23 million dollars in profits, in Latin America. Mexico, Brazil, Colombia, Peru, Argentina, and Chile are the countries with the biggest market share in e-sports. The Latin-American market amounts to 397 million gamers, and from them, 206 million are online players. Video game competitions in the

<sup>56</sup> Regarding video games and Peruvian settings see: "Cinco Videojuegos inspirados en el Perú", Perú Info, accessed March 2022, <https://peru.info/es-pe/turismo/noticias/3/18/cinco-videojuegos-inspirados-en-el-peru>.

region are growing at a rate of 6 million dollars annually, engaging more fans at different tournaments and streaming events.<sup>57</sup> The opportunities are endless when it comes to tourism. For instance: how can an e-sport tourism industry be developed? How can destinations and places be promoted among millions of users in LAC using online platforms or video games? How can these new stories and cultural practices help nurture nation brands?

Recent studies on virtual tourism<sup>58</sup> emphasize the potential of these technologies not only for the pre-trip —to trigger an interest in deciding on different destinations having more accurate information or planning ahead—, nor as mere parallel experiences, but also at the ‘post-trip’ experience, an almost unexplored territory from the standpoint of virtual reality technologies.

#### **Fourth Key: City, Local Tourism, and Microtourism**

The fourth key emphasizes thinking locally: in a context of mobility restrictions, it is necessary to promote and renew the management of local destinations and address local audiences. The pandemic has pushed countries and cities to act and think locally with greater incidence than never before.

Restrictions on mobility have favored short distances over long ones resulting in more visits to local destinations. This trend is not unfamiliar to tourism. The sector has begun to change its strategy and focus on local destinations. Although in the beginning this was an abrupt and forced change, it has gradually become part of a more organic strategy. Whether from the perspective of consumers, tourists, investors, managers, entrepreneurs, or decision makers, local settings, events and circuits are now receiving the most attention in the short and medium term.

Internal tourism will be part of the recovery of the sector. Costa Rica rescheduled national holidays on Mondays in 2021. Argentina announced the creation of an Internal Tourism Observatory. According to Matías Lemmens, Minister of Tourism, the observatory will allow “to know and have a profile of Argentine tourists”, as well as to “measure the impact of the situation and contribute to a better structural understanding of

<sup>57</sup> Antevenio, “Mejores eventos de e-sports en Latinoamérica en 2019”, *Antevenio*, May 6, 2019, accessed March 2021, <https://www.antevenio.com/blog/2019/05/mejores-eventos-de-esports-en-latinoamerica-en-2019/>.

<sup>58</sup> Global Data, accessed May 2021, <https://www.globaldata.com/>.

Argentine tourists within the private sector.”<sup>59</sup> Finally, Thailand will subsidize 5 million night-stays at hotels, with rates 40% off, aiming at boosting domestic tourism.<sup>60</sup>

Museums, heritage sites, galleries, or even local festivities and festivals, previously targeting foreign and massive audiences, can now engage local audiences, strengthening regional roots among communities. In the context of mobility and mass gathering restrictions, tourist attractions have reopened to receive local and national visitors. Heritage sites such as Machu Picchu or Teotihuacán, historical downtowns, natural parks such as Iguazú Falls or several beaches in the Caribbean (outside LAC, even museums like the Louvre or El Prado) have followed the same policy, gradually incorporating foreign tourism.

Due to their physical dimensions, most of these cultural spaces have better means for establishing health protocols of social distance among visitors, controlling access and the use of open and public spaces.<sup>61</sup> In this regard, consultant José Pablo Arango, former director of Nation Brand Management at ProColombia, remarks that internal outdoor settings can become attractive destinations. Restricted and locally focused cultural and tourist offerings representing neighborhoods, communities or districts, have an opportunity to establish cultural ‘micro-routes’, renewing the tourist offering.<sup>62</sup> In Chile, for example, Fabiola Sanham points out that the idea of weekend ‘getaways’ to nearby destinations finally took off in 2020, when the market adapted to the new circumstances by offering preferential rates to national travelers, seeking to guarantee full occupancy.<sup>63</sup>

<sup>59</sup> “Argentina creará observatorio de turismo interno”, *Voydeviaje.com*, accessed March, 2021, <https://www.voydeviaje.com.ar/argentina/nacion-creara-observatorio-de-turismo-interno>.

<sup>60</sup> UNWTO, “OMT destaca potencial del turismo Interno”, September 14, 2020, <https://www.unwto.org/es/news/la-omt-destaca-el-potencial-del-turismo-interno-para-ayudar-a-impulsar-la-recuperacion-economica-de-los-destinos-en-todo-el-mundo>.

<sup>61</sup> 64% of the respondents declared having reduced capacity and attendance for events and destinations, complying with enforced regulations.

<sup>62</sup> José Pablo Arango (Former director of Nation Brand Management at ProColombia and founder of Colombia Realismo Positivo), interview by Félix Lossio and Natalia Ames, January 25, 2021.

<sup>63</sup> Fabiola Sanham (Head of the Marketing Unit at Invest Chile), interview by Félix Lossio and Natalia Ames, February 2021.

Rocío Latorre, Gabriela Sandoval and Daniela Astudillo, “Los planes de los chilenos para vacacionar en pandemia”, *La Tercera*, November 25, 2020, <https://www.latercera.com/nacional/noticia/los-planes-de-los-chilenos-para-vacacionar-en-pandemia/3T6A4V67CVDVBKZR7JIQTYU74/>.

During the last months of 2021, strategies were developed by public and private sectors to enhance domestic tourism. For Rodolfo Milesi, consultant and nation branding expert, the most successful initiatives were the ones that considered developing partnerships with local governments.<sup>64</sup> The reconfiguration of internal tourism demands commitment from all actors involved: airports and hotels, transport services, restaurants, and leisure spaces, as Jose Pablo Arango has pointed out in the case of Colombia.<sup>65</sup>

This approach entails focusing more on local actors involved in tourism and nation branding. Mihalis Kavaratzis, expert of the International Place Branding Association, suggests that we must begin to discuss the relevance of promoting new lines of nation brand management such as what he calls “community brands”, based on the local communities rather than entirely on cities or countries.<sup>66</sup> Local tour operators, public local authorities, and civil society networks influential in their communities will be the managers, beneficiaries, and direct intermediaries of empowered “tourism(s) and local audiences”.

### **Fifth Key: New Forms of Tourism**

“New tourism” is a concept highlighting the need to come up with and manage different offerings of destinations and tourist experiences, while reflecting upon new narratives for nation branding through a priority set of knowledge and values. Aside from traditional tourism, such as ‘sun-and-beach’ or gastronomic tourism, there is still room for other types of cultural and creative tourism, such as film or music tourism, that requires drawing on the vision, knowledge and skills from the creative fields and on the use of technology.

For some years now, several countries have developed a specialized, non-traditional tourist offering, such as cinematographic, musical, gastronomic, festival or even underwater tourism.<sup>67</sup> Nation branding has undergone a similar process, focusing less on traditional physical settings and more on local identities, on potential experiences and a body of values, skills, abilities, and items exceeding traditional tourism.

<sup>64</sup> Milesi, interview.

<sup>65</sup> Arango, interview.

<sup>66</sup> Kavaratzis, Mihalis, “From City Marketing To City Branding: Towards A Theoretical Framework For Developing City Brands”, *Place Branding*, vol. 1, n° 1, 2004.

<sup>67</sup> On the future of underwater tourism, see Lemmin-Wolfrey 2020.

Conventional strategies like ‘sun and beach’ for the Caribbean, or archaeological sites and gastronomy for Mexico or Peru, should be revisited and diversified to a much greater extent, strategically supporting other areas of differentiation, competitiveness, identity, and reputation, or what we call “new tourisms”.

Some ideas for updating tourism —as well as for developing a more complex nation brand, based on the skilled use of new technologies— are already integrating ancient knowledge into new technology, like the Peruvian strategy on “superfoods”,<sup>68</sup> that rekindles ancestral growing food techniques, and enhances production and marketing through new technologies. Other examples, like film commissions, promote settings as destinations for tourism and investment.<sup>69</sup>

The promotion of destinations through films has proven to effectively boost tourism while promoting new routes and circuits. According to a Netflix survey, 81% of its global audience that has never been in Spain, admitted being interested in visiting the country, after watching Spanish landscapes depicted in the platform’s content.<sup>70</sup> This has been capitalized by the Spanish authorities, and in June 2021, in association with Netflix, launched a tourism promotion strategy through the video promotional “How can you say “Spain” without even naming it?”, aiming at tourism recovery and showcasing different Spanish settings where series and films have been shot for the streaming company.<sup>71</sup> The impact of film and series on tourism can also be measured on a global map of favorite Netflix series by country of origin, as well as in the most searched-for titles by territory, data that has become treasured for tour operators worldwide.<sup>72</sup>

Certain unrelated industries, like the wine and audiovisual sectors, have developed shared strategies. In Argentina, the Mendoza Wine Fund joined Filmandes, a cluster of creative companies, to strengthen the cultural identity of Mendoza, by promoting tourism and economic

68 “Superfoods”, Peru Info, accessed February 2021, <https://peru.info/es-pe/superfoods>.

69 See this case in the next chapter.

70 “Un recorrido por todos los escenarios de Netflix”, *El Periódico*, accessed May 2021, <https://viajar.elperiodico.com/viajeros/recorrido-escenarios-netflix-espana>, consultado en junio 2021.

71 “Acuerdo de Turespaña con Netflix”, Mincetur, accessed June 2021. The event was launched on Youtube.  
<https://www.mincotur.gob.es/es-es/GabinetePrensa/NotasPrensa/2021/Paginas/Acuerdo-de-Turespa%C3%B1a-con-Netflix.aspx>.

72 “Every country’s favorite original Netflix”, Budget Direct, September 2020, accessed June 2021, <https://www.budgetdirect.com.au/blog/every-countrys-favourite-netflix-original.html>.

development through wine and cinema, with the 2030 Strategic Wine Plan as its framework. Among the conjoint initiatives already launched are a film and wine festival, with a more important role for wine within the environment —regional landscapes— in audiovisual content, and the plan to build a vineyard in District 33, a center of innovation being developed within the city, where a filming studio is also envisioned. This alliance has also fostered cultural public policy in the region, and the currently thriving Mendoza Film Commission is a good example.<sup>73</sup>

Music is another trigger for tourism, whether we talk about music festivals, bands, popular songs and videos, or any other form of contemporary music work. In 2019, 12.6 million music tourists visited the UK (both local and international tourists, motivated mainly by a music event), who attended live events and generated more than 45,000 direct full-time jobs.<sup>74</sup> On the other hand, countries such as Spain and Portugal increased the number of “musical tourists” by 500% between 2014 and 2018.<sup>75</sup> In LAC, festivals such as Cosquín Rock, carnivals in cities like Trinidad and Tobago Carnival, Barranquilla or Rio de Janeiro, have become poles of attraction for massive tourism, with an accumulated audience of about more than 2 million people per year.

Aside from live events, there are other means to promote and attract tourism like music videos. An emblematic case is the music video for “Despacito”, a song recorded by Luis Fonsi and Daddy Yankee in 2017, and filmed entirely in San Juan, Puerto Rico. By March 2022, the video reached more than 7.7 billion views on YouTube, becoming the most viewed in the history of the platform up until 2019, and triggering interest from international tourists. Based on its global success, there was a 45% increase in searches for hotels in Puerto Rico on the search engine Hotels.com, and a 24% increase in visits to pages related to Puerto Rico on the TripAdvisor platform, during the next months after the video was launched.<sup>76</sup>

New tourism also requires reinventing business models or adapting to new forms of entrepreneurship. For instance, promoting short work stays in secure and attractive environments that have adapted spaces with internet access and other services. Also, health tourism in a post-COVID-19

73 “El vino y el cine se unen”, Filmandes, accessed July 2021, <https://filmandes.com/en-mendoza-el-vino-y-el-cine-se-unen/>.

74 *Music By Numbers 2020* (UK Music: 2020).

75 UNWTO, ProColombia and Sound Diplomacy, op. cit.

76 Suzy Strutner, “Despacito is making everyone want to visit Puerto Rico”, *Huffpost*, accessed July 2021, [https://www.huffpost.com/entry/despacito-puerto-rico\\_n\\_59710ccee4b09e5f6cce3697](https://www.huffpost.com/entry/despacito-puerto-rico_n_59710ccee4b09e5f6cce3697).

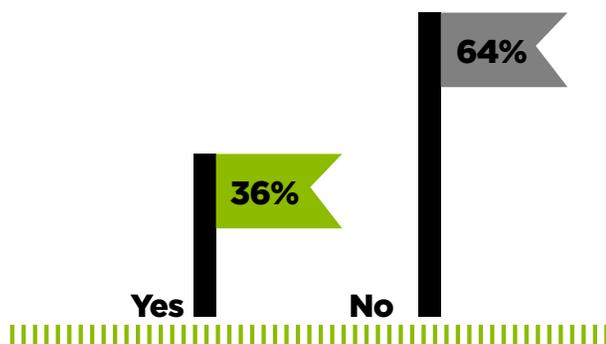
context, and other tourism opportunities. For instance, in different LAC countries, hotel facilities are now being offered as coworking spaces.

In a world of complex problems demanding multidimensional solutions, where tourism and nation branding look forward to innovative strategies, it is necessary to prioritize skills like easily adapting to digital challenges, sustainability and environmental awareness or creativity. Tourism and nation branding need to bring in professionals from other disciplines such as cinema and audiovisual media, engineering, health, biotechnology, apps and software development, among others.<sup>77</sup>

### Collaboration Rather than Competition

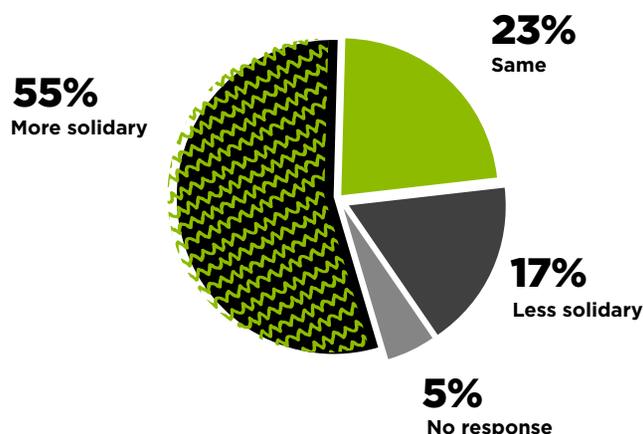
Tourism and nation branding operate in a competitive context, but today, more than ever, they need to look for collaboration strategies. The pandemic has brought opportunities to strengthen regional collaboration and promote regional reputation based on safety, well-being, and attractive tourist offerings. According to our survey, 55% of respondents highlighted that the tourism sector has become more supportive during the pandemic, while 36% admitted having provided pro bono consulting to other organizations. Respondents also pointed out the importance of establishing alliances, mainly with public sector actors, such as federal or national governments (46%), and local and provincial authorities (33%) (table 13).

Table 13. **Associations/companies that have received or provided help or advice at no cost**



<sup>77</sup> For instance, in Uruguay, their scientific development and their national health and biotechnology expertise have become part of the narrative of nation branding. (Perdomo, interview).

Table 14. Perception of increased solidarity during the pandemic



It is possible to focus on regional platforms for collaboration, exchange of information and strategies, or to develop collaborative campaigns to strengthen the reputation of LAC. These actions can contribute to promoting external tourism and regional tourism, simultaneously.

An example of a regional collaboration initiative is the Consejo Latinoamericano de Marcas País (COLATAMP), founded in 2011 with the aim of strengthening links between the organizations in charge of nation branding from member countries. The institution, which has consolidated itself since its creation, exchanged information and organized virtual meetings constantly even during the pandemic, setting a valuable example of collaborative work.<sup>78</sup> During the health crisis, its tasks were performed effectively thanks to assured and fast communication between the members, while facing common problems such as global uncertainty due to a crisis caused, at first, not by trade or tourism but by health factors.<sup>79</sup>

On the other hand, tourism and nation branding experts such as Gilberto Salcedo, vice president of ProColombia, and Federico de Arteaga, leader of the Smart Tequila strategy, emphasize the importance of regional cooperation. For Arteaga, entering agreements with other 'smart' like tourist destinations is essential to exchange information in real time.<sup>80</sup> Salcedo believes generosity and solidarity among LAC countries is good to portray a regional image, while keeping alive global memory and global businesses. He also suggests that we should start thinking

<sup>78</sup> Milesi, interview.

<sup>79</sup> Valverde, interview.

<sup>80</sup> Federico de Arteaga (leader of Tequila Inteligente strategy), interview by Félix Lossio and Natalia Ames, March 1, 2021.

about targeting high-end tourists with a multinational route observing and implementing health protocols.<sup>81</sup>

All five challenges and key points discussed here demand the use of new technologies, and can be promoted in cooperation with the cultural and creative industries. Digitization of processes and data intelligence should be further put into practice. Lastly, on the topic of the digital experience of countries —regarding local tourism and new tourism— alternative ways of using technologies and creative industries should be envisioned. What is clear is that technologies are no longer a mere enhancer and that culture is not only a part of tourist offerings, but rather the core base of tourism and nation branding.

81 Salcedo, interview.

# 3. Cases of Innovation

The Smart Tequila strategy has made it possible to face the global tourism crisis, providing rapid and innovative responses to the crisis and prioritizing decision-making based on real-time information systems.

—**Federico de Arteaga**, leader of the Tequila Inteligente strategy



In this section we analyze four cases of innovation in tourism and nation branding in LAC. They are projects, models, and plans that, even if they were not started during the pandemic, have expanded their mission into the creative-digital realm, and can teach us lessons about this transition. They represent concrete responses to the concerns expressed throughout these pages. Each case exemplifies a successful solution to different questions and challenges such as the promotion of a destination using a strategy that links tourism and filming; the implementation and management of innovative models for tourism promotion; or the use of attractive digital tools and platforms such as video games. Their examples also illustrate how alliances can be established to consolidate shared objectives.

## Boosting tourism through screens

### How to Promote Countries from the Standpoint of the Audiovisual Industry?

In recent years, film commissions have developed strong links with tourism and nation branding. This can be explained through the growing importance of film tourism (known also as screen tourism): the trend of choosing tourist destinations based on their depiction in films or other audiovisual products.

One successful example of increasing visits after the premiere of a TV series is *Game of Thrones*. During the premiere of its final season, travel reservations to Europe increased. Between January and April 2019, Iceland reported a +166%; Croatia, +68%, and Ireland, +44%. Airline ticket reservations to these countries increased up to 124%.<sup>82</sup> Another case is *Chernobyl*, by HBO: a Chernobyl travel agency reported 40% more bookings since its release.<sup>83</sup> The animated film *Coco* boosted tourism in Michoacán, Mexico, increasing by November 2018 more than 50% in comparison to 2017; and by 2019 there was an increase of 20%, compared to the previous year.<sup>84</sup> Although not recently, other paradigmatic examples are the

<sup>82</sup> Hosteltur Economía, “Cómo influye Juego de Tronos en la elección de un destino turístico”, *Hosteltur*, May 26, 2019, [https://www.hosteltur.com/128949\\_como-influye-juego-de-tronos-en-la-eleccion-de-un-destino-turistico.html](https://www.hosteltur.com/128949_como-influye-juego-de-tronos-en-la-eleccion-de-un-destino-turistico.html).

<sup>83</sup> Max Hunder, “El turismo a Chernóbil se dispara un 40% por el éxito de la serie de HBO”, *La Vanguardia*, June 6, 2019 <https://www.lavanguardia.com/ocio/viajes/20190606/462705101224/aumenta-turismo-chernobil-ucrania-serie-hbo.html>.

<sup>84</sup> Infobae, “La nueva ruta turística en México que surgió gracias a Disney”, *Infobae*, January 28, 2020, <https://www.infobae.com/america/mexico/2020/01/29/la-nueva-ruta-turistica-en-mexico-que-surgio-gracias-a-disney/>.

films *Braveheart* (300% more tourists in Scotland), *Four Weddings and a Funeral* (the Crown Hotel in England was fully booked during the three years after its premiere), *Troy* (73 % more tourists in Çanakkale, Turkey), and *Harry Potter* (50% additional tourists in all locations of the saga).<sup>85</sup>

Presently, tourism stakeholders recognize the importance of cinema and audiovisual content in the decisions of travelers. More than a third of potential visitors to Britain want to visit places they have seen in films or on television.<sup>86</sup> For this reason, different countries have established film commissions that officially represent their country and its locations. They are in charge of generating the best conditions to attract foreign audiovisual productions for movies, series, television programs, music videos, commercials, and the like; offering in return, benefits and rewards for filming companies. These benefits may include:

- Tax incentives, such as cash rebate, which are the return of money spent in the country (up to a certain percentage); transferable tax credits for audiovisual and logistics services performed in the country; exemption from taxes such as VAT, among others.
- Location catalogs including photo shoots, virtual tours, and transportation routes, as well as information on weather, architecture, landscapes, and altitude.
- Directories of available audiovisual services, such as local production companies, film technicians, filming costs, recording studios and post production services.
- Information on filming permits, temporary imports of recording equipment, work visas, etc.

The success of a film commission is measured not only by the number of foreign productions made in a country —which attract international tourists—but also by the number of jobs created in relation to filming, as well as their contribution to the GDP. The work of film commissions involves local film industries at different stages of the value chain, but it

<sup>85</sup> Latin American Training Center - LATC, *Guía para Film Commissions en Latinoamérica: Orientación básica para la implantación y operación de una Comisión Filmica*, 2016, [https://latamtrainingcenter.com/wp-content/uploads/2016/11/guia-film-comissions-en-latinoamerica\\_PDF.pdf](https://latamtrainingcenter.com/wp-content/uploads/2016/11/guia-film-comissions-en-latinoamerica_PDF.pdf).

<sup>86</sup> Visit Britain, “VisitBritain launches marmalade-inspired tourism campaign ahead of Paddington 2”, Visit Britain, 2017, <https://www.visitbritain.org/visitbritain-launches-marmalade-inspired-tourism-campaign-ahead-paddington-2>.

also favors other services such as lodging, catering, transportation, security and surveillance, equipment rental, among others.

The audiovisual content filmed at different locations along with film commissions serve as platforms to promote different aspects of a country, such as its settings, its cultural diversity, its security conditions, its hotel industry, and its effective operating environment for business, among others. All of them are crucial assets to strengthen the reputation and the nation brand of a country, and consequently to attract global tourists and investors. Film commissions have been established in recent years across LAC gradually, depending on public institutions, following different administration schemes:

- Autonomous entities created by specific laws, as in the case of Colombia, whose Law 1556, founded the Film Commission of Colombia in 2012. For it, the conjoint work by the ministries of Tourism and Culture was crucial. It is currently under control of Proimágenes, a public-private institution.
- A suboffice of a country's Film Board in the Dominican Republic.
- As part of the nation branding strategy, through their website, like in Peru.<sup>87</sup>
- A specific area depending on the governmental agency promoting business in exports and foreign investments, like in Jamaica (JAMPRO).
- Regional film commissions supported by local governments, like in Brazil, where the Rede Brasileira de Film Commissions (REBRAFIC) groups nine commissions of nine Brazilian cities or regions (other fourteen are still in the process of formation), aiming at promoting different settings nationally, regionally, and locally.

## **Technology and Culture in Medellin, Colombia and Tequila, Mexico**

### **How to Manage a Smart Tourist Destination?**

The concept of “Smart Tourist Destination” (STOUD) highlights different aspects of sustainability and global tourism, related to the digitization of business and destinations, universal accessibility and resilience, and the value added by cultural and creative industries.

Currently, the STOUD model has the support of international entities like UNWTO, the Organization for Economic Co-operation and Development (OECD), the World Travel and Tourism Council (WTTC), and the IDB.

<sup>87</sup> Film in Peru, official website, <https://peru.info/en-us/filminperu>.

In LAC, the Mexican city of Tequila has applied the STOUUD encompassing methodology since 2014, focusing especially on smart management and the use of digital tools. The goal has been to achieve comprehensive objectives in the development of the city as a smart destination, based on key concepts like governance and sustainability.

According to Federico de Arteaga, director of the Smart Tequila strategy, this approach has allowed them to be prepared for the current global emergency. For instance, they have been able to rapidly and innovatively solve the crisis, devising workshops with local tourist agents that favor decision-making based on real-time information systems.<sup>88</sup>

Given that Tequila had been working with digital tools to measure attendance per square meter to avoid saturating the city's services, they have been able to cope flexibly and immediately with the new challenges imposed—such as social distancing and other restrictions on public gatherings— within a comprehensive digitized system already in use. Spaces such as local museums, gastronomic centers, growing plantations, and ecotourism areas are their main objective.

In December 2020, Medellín received from the SEGITTUR Association in Spain, the Smart Tourist Destination award, after being evaluated positively in five areas: governance, innovation, technology, sustainability, and accessibility.

One of the objectives of the city was to become the Colombian “Software Valley”, by involving its citizens and rooting itself on cooperation between academia and the public and private sectors. In the evaluation carried out by SEGITTUR, the city excelled at innovation, especially in its administration practices. They stated that “Medellín is making a determined commitment to innovation as to leverage opportunities and to face the coming challenges for tourism, while highlighting the intensive use of information and communication technologies in the management of public services and in the smart development of the city to improve the life and social well-being of their residents and visitors.”<sup>89</sup>

Among the innovation projects in progress, the Business Center for Innovation Ruta N stands out,<sup>90</sup> which seeks to improve the lives of their residents through science and technology, by engaging new talent,

<sup>88</sup> Arteaga, interview.

<sup>89</sup> Destino Turístico Inteligente, “Medellín, primer Destino Turístico Inteligente de Colombia”, Destino Turístico Inteligente, 2020, <https://www.destinosinteligentes.es/medellin-primer-destino-turistico-inteligente-colombia/#:~:text=El%20informe%20entregado%20al%20Ayuntamiento,informaci%C3%B3n%20y%20la%20comunicaci%C3%B3n%20en>.

<sup>90</sup> Ruta N Medellín, “Somos el centro de innovación y negocios de Medellín”, *Ruta N Medellín*, <https://www.rutanmedellin.org/es/nosotros/ruta-n/sobre-nosotros>.

investment, and global companies, especially those from the software industry.

Other initiatives include the establishment of free broadband wi-fi in parks, and the modernization of the public transport system. According to the deputy secretary of Tourism of Medellín, Ledys Vianey López Zapata, the STOUT model “will allow the positioning of the city as an attractive destination for transformation, guaranteeing the sustainable development of companies and residents, promoting economic growth, supporting the reactivation of the tourist sector, and allowing the consolidation of the city’s image as an innovative place.”<sup>91</sup>

## **Forza Horizon 5 in Mexico**

### **How to Promote Tourism Using Video Games?**

Video games have a high marketing potential and, unlike traditional media like cinema and television, they remain an unexplored territory. In experiential marketing—a strategy for promotion that does not revolve around the product or service, rather it seeks to create real-life experiences for potential users—video games can engage potential tourists, generating a positive image and improving communication, due to its immersive nature and the process of identification with the characters and places represented by them.<sup>92</sup> In addition, virtual tourism is an alternative idea that has gained momentum.

Both trends merge into the racing video game *Forza Horizon 5* for Xbox, released in November 2021. Set in Mexican locations, the game recreates the feeling of driving and discovering the country’s territory, its landscapes and culture, through a faithful depiction of archaeological zones, Caribbean beaches, desert sceneries, colorful alleys of ancient cities like Guanajuato, and many other authentic settings.

The British company in charge, Developer Playground Games<sup>93</sup>, started the project in 2018. The first stage involved 150 people from the United Kingdom that researched and documented the history, geography, architecture, flora, fauna, traditions, and lifestyle traveling to each place of

<sup>91</sup> Gabriela Martínez, “Medellín avanza hacia su transformación como destino turístico inteligente”, *Innova Spain*, November 13, 2020, <https://www.innovaspain.com/medellin-destino-turistico-inteligente/>.

<sup>92</sup> Mattia Rainoldi, et al., “Video Game Experiential Marketing in Tourism: Designing for Experiences”, *ENTER22 e-Tourism Conference*, issued January 1, 2022, [https://link.springer.com/chapter/10.1007/978-3-030-94751-4\\_1](https://link.springer.com/chapter/10.1007/978-3-030-94751-4_1).

<sup>93</sup> Playground Games: <https://playground-games.com/>

the country. They studied different regions and during different seasons of the year to even capture weather nuances.<sup>94</sup> “We needed to depict a country with incredible natural diversity,” said Mike Brown, its creative director. “We discovered that Mexico is almost the whole world in one country. It has canyons, beautiful coastlines, about four different types of deserts, beautiful old cities, volcanoes and mountains, and ski resorts. It also has a culture that is known and loved all over the world. Wherever you go, people recognize Mexican music and art, it has a rich history, so it was a really exciting proposition.”<sup>95</sup>

Developers wanted to provide an authentic view of the Mexican landscape, moving away from clichés and other television and film portrayals of Mexico, “mostly based on the far north of the country as a deserted and dangerous place.” The team worked together with local people and institutions in order to achieve accuracy. They worked hand in hand with the Ministry of Culture to truthfully replicate historical monuments and hired political cartoonist Lalo Alcaraz as their cultural consultant and scriptwriter.

After a year of research, the team was ready to start but the pandemic broke out. However, they had enough time to prepare and to buy the necessary equipment to work remotely during lockdown in the UK. Mike Brown admits that it was a quick shift, having to optimize their workflow since some tasks were harder to get done: “The larger Xbox group was really helpful. We were able to upload our development build to Microsoft’s Insider Hub app and play it on retail Xboxes so people didn’t have to take expensive dev kits home. That was an interesting and quite useful setup for the designers – sitting in your living room playing the game is very different from being at your desk with your PC and a dev kit.”<sup>96</sup>

The impact on local tourism of one of the most popular racing games, with millions of players around the world, can be very positive. Collaborations between international video game developers and local tourist organizations are an innovative solution with huge potential.

Aware of the benefits, Guanajuato’s Ministry of Tourism wrote on Twitter: “#Guanajuato is part of the new @ForzaHorizon. The best-selling racing game in the world will be set in Mexico and Guanajuato, an

<sup>94</sup> Keith Stuart, “‘Mexico is ridiculously beautiful’: how *Forza Horizon 5* drove fresh sights into living rooms”, *The Guardian*, November 26, 2021, <https://www.theguardian.com/games/2021/nov/26/forza-horizon-5-uk-developer-play-ground-games-mexico-driving-game>.

<sup>95</sup> Idem.

<sup>96</sup> Idem.

icon for both urban and off road rallies, can't miss it. Ready to play? #ForzaHorizon5.”<sup>97</sup>

## Strategic Tourism Plan for Malaga, Spain

### How to Transform a City into a Tourist Destination of Museums and Technology?

Twenty years ago, the Andalusian city of Malaga opted for a Strategic Tourism Plan that would emphasize cultural tourism by 2020, paying special attention to museum tourism and technology.

Although Malaga was well-known as a sun-and-beach destination, there was a lack of cultural offer promoting different expressions and manifestations. Aiming at “reinventing the city”, they designed a plan drawn up by the Malaga City Council that recognized their four tourist priorities as cruise tourism, meeting tourism, language tourism and cultural tourism.

Their goal was to position Malaga as a cultural pole in Spain and Europe based on its offer and dynamism in areas such as gastronomy, theaters, local history and, in particular, museums. To achieve this purpose, the City Council developed strategies such as the creation of a sub-regional brand: “Málaga, city of museums”, that included the promotion of the cultural identity of the city by the museum sector, enhancing its attractiveness for national and international tourism. They also organized cultural tourism work groups made up from local, public, and private institutions, while envisioning the improvement of the local infrastructure and the pedestrianization of the historic center. Finally, they designed a new tourist offering that included “Málaga senses: sensorial routes”, a personalized circuit emphasizing the experience of the senses (smell, taste, touch), and “Theatrical night visits”, a night tour to the most important monuments of the city, aiming at learning about local history and their environments.<sup>98</sup>

As in many other Latin American cities, in Malaga they did not see themselves in the position to compete with other big cities and with the country's capital's cultural offering. As Gemma del Corral Parra from

<sup>97</sup> Sebastián Quiroz, “Así fue cómo la cuenta oficial de Guanajuato respondió a la revelación de *Forza Horizon 5*”, *Atomix*, June 17, 2021, <https://atomix.vg/asi-fue-como-la-cuenta-oficial-de-guanajuato-respndio-a-la-revelacion-de-forza-horizon-5/>.

<sup>98</sup> Ayuntamiento de Málaga, *Plan Estratégico del Turismo de Málaga 2016-2020*, 2016, [https://ciedes.es/images/stories/Laura/PLAN\\_2020/2PLAN ESTRATEGICO\\_TurismoMalaga.pdf](https://ciedes.es/images/stories/Laura/PLAN_2020/2PLAN ESTRATEGICO_TurismoMalaga.pdf).

the City Council admits<sup>99</sup>, the city had to compete with the Alhambra in Granada, the Giralda in Seville and the Mosque in Cordoba, not to mention Madrid or Barcelona. This led them to first identify their landmark assets, look into their own local history and heritage, and reinvent themselves “in a humbler way”, compared to other cities that were already benchmarks with more consolidated cultural offerings.

The first step was to strengthen the link between the city and its most iconic local artist like Pablo Picasso, who paradoxically, was associated with cities or countries like France, but not with Malaga. In addition, Malaga had an advantage over other museums in the world: the city is home to his birthplace, which was converted into a museum. The narrative they needed to promote was that Malaga was Picasso’s birthplace, where he learned to paint, where he spent his childhood drawing inspiration from its streets and squares. It was a risk, but it worked.

At the same time, they worked consistently with schools and children, so that the largest number of children in Malaga would have visited local museums for free during their school years, thus forming a public with an interest in the local cultural offering. Other actions such as a film festival in Spanish as well as free contemporary cultural events were promoted, focusing on diverse programming, engaging different audiences, and creating an interested audience.

The most recent statistics give due credit to the program. Between 2012 and 2018 tourists have grown from 3.3 million to 4.4 million, and museum visitors went from 813,186 to 1,382,489. This has translated into 6,102 direct, indirect, and related jobs created by 2015, and today 193 venues are devoted entirely to cultural activities across the city. Figures aside, places like “Entorno Thyssen” have been revitalized. A low-traffic area until recent years, it has now become a hub of cultural offerings connected to other premises and service halls around the Museo Thyssen Málaga.

The strategic plan envisioned not only cultural aspects but also the use of technology, pointing towards becoming a center for knowledge. Malaga has been chosen to be the location for the Bonafont Center, the most important center in Europe, that can hold up to 200 workers. It encompasses a technology park, where a series of conferences discussing technology have been held. Recently, Malaga has become Google’s headquarters for cybersecurity. The city’s cultural offering and technological allure have been a strategic link to attract more people to choose Malaga as a place to live and work.

Today, Malaga is the most referential city from the autonomous community of Andalusia, and one of its economic engines, inviting us to

<sup>99</sup> Gemma del Corra Parra, Ayuntamiento de Málaga, interview by Trinidad Zaldivar and Alejandra Luzardo, July 2021.

rethink what we least imagine. It is a good example of a city that, despite having Madrid and Barcelona as global cultural “competition”, has been able to display and strategically manage its heritage and local history, succeeding in positioning itself within the European cultural tourism offering, and generating jobs while enhancing its own regional brand.

# 4. Final Observations



In 2020, several values that were not part of the narrative, such as scientific sovereignty and connectivity, entered into the discussion of nation branding. The need to keep committing resources to science and health programs was highlighted. Virologists have spoken in the media. They have taken a center role that used to be destined to soccer players.

—**Larissa Perdomo**, manager of Marca Uruguay

In this volume we have discussed figures, cases and opinions suggesting routes to strengthen the tourism sector and nation branding through new technologies and cultural and creative industries. We have assumed that, in the context of the evident impact of the pandemic, tourism, and nation brands have proved to be dynamic and resilient, and to that extent, they have to be in constant review of their own narratives and strategies. With the decisive input from the cultural and creative industries, and new digital technologies for its policies and planning, tourism has the opportunity to become more resilient when facing the new challenges of today's world. It is also clear that today tourism needs to be rethought and reconsidered in a face-to-face and digital hybrid context.

Below, we present some advice in terms of public policy, from the standpoint of national and local governments, organizations, companies, and civil society. We also provide valuable information to consider when deciding to invest in the development of the sector through technology and the creative industries.

### **1. Tourism based on creative experiences: the need to take risks**

If we admit that tourism is a diversified field based on aesthetic and sensory experiences, then the cultural and creative industries with their strong connection and new technologies are an endless source to engage travelers, promote and reimagine traveling experiences, providing ideas and solutions for stakeholders. Capitalizing on creative services and products of what we have called the “traveler routes” will be key to compete in the new market growing in diversity of experiences demanded by travelers. Music videos, series, and films, video games or festivals are all cultural goods, playing a decisive role in tourism.

### **2. Aiming towards an active-digital tourist rather than a passive-face-to-face one**

Tourists today are active agents, constantly participating from the digital world, rather than just being targeted by cultural offerings. From the “pre-trip” to the “post-trip”, they use different digital tools to plan, enjoy, manage, remember, and actively share their experience. Likewise, the cultural and creative goods and services offered to tourists can be reproduced and transferred in a digital media environment, ready to be enjoyed in the context of remote, digital, and at-home entertainment and leisure experiences. All this should be carefully considered to better

identify the profiles of new tourists and design pertinent offerings in accordance with the new times.

### **3. Hybrid tourism**

Private operators, companies, and public institutions must incorporate new and diverse technological tools to enhance the face-to-face and digital experience of tourists. Digital tools are essential to manage new experiences and to renew nation brands. Therefore, stakeholders must pay attention to digital consumption patterns, while trying to bridge the digital divide.

### **4. Bring new professionals and their skills into tourism and nation branding**

New professional profiles like designers, visual artists, musicians, managers of live cultural events, architects, influencers, tiktokers, youtubers, game developers or digital programmers should have a greater role in the creation and promotion of tourism, as well as in building, developing, and managing nation brands. Developing video games, producing songs or viral videos and distributing them in global markets, or managing other social networks aside from Facebook or Twitter, are also skills associated with the development of tourism. Today, scientists and health professionals play a prominent role in the sector too, since health protocols will often be the starting point for any plan involving dealing with crowds and public spaces, as well as any policy on guaranteeing safety and trustworthiness.

### **5. Tourism based on health security and nation brands whose reputations are based on trustworthiness.**

In light of public health concerns, tourism and country brands must be seen as safe and trustworthy. In this aspect, the cultural and creative industries linked to tourism have a competitive advantage, which is crucial at the local level. Places such as museums, heritage sites, historic downtowns, or natural parks, are usually situated outdoors, within big spaces allowing them better control over the flow of visitors, which puts them in a better position for empowerment and adaptation. Smart high-tech destinations are capable of superior monitoring and control, offering tourists up-to-date information in terms of health and safety. Likewise, the

managers and directors of nation brands must reinforce narratives and communication strategies using messages on health, safety, and trustworthiness. These are core values that local and global visitors will look for while making a decision on traveling or investing in a territory, impacting the very reputation of countries themselves.

## **6. Collaboration and cooperation in nation branding**

Regional collaboration in tourism and nation branding among public institutions, companies and cultural managers has been remarkable during the pandemic. A collaborative mindset can strengthen institutional relations, information and knowledge exchange, and facilitate direct cooperation between countries or companies, as is already occurring in the case of public nation brand managers in LAC. Building new collaboration networks, at a regional and local level, can strengthen tourism policies and nation brands in our region.

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- Valverde, Daniel (Director of Costa Rica's Nation Brand). Interview by Félix Lossio and Natalia Ames. January 22, 2021.

## Quantitative Study for this Research

- Aura / SIMO, "Quantitative study for the Series 'Art, Culture and New Technologies in Latin America and the Caribbean'", Mexico City: 2021.

# 6. Glossary

## B

### **Big data**

Large and complex data set employed by organizations to make decisions and implement strategies

## C

### **Celebrations**

Social events celebrated publicly. They can be traditional, religious, profane, carnivalesque or national holidays.

### **Coworking**

Collaborative meeting and working space shared by companies and individuals.

## D

### **Digital Divide**

Unequal access to technologies among social groups.

### **Digitization**

The Process of transforming analogue information or objects into digital formats.

## F

### **Fairs**

Events taking place in a specific place and time with the purpose of promoting cultural goods and services.

### **Festivals**

Events taking place in a specific place and time with the purpose of showing exhibitions or performances of an artistic or folkloric nature.

## G

### **Gamification**

Learning strategy based on playful elements or game design components, with reward mechanisms playing a key role.

## H

### **Hybrid tourism**

Tourism comprising two or more models of tourism.

## L

### **Local tourism**

Tourism that focuses on attracting local visitors.

## M

### **Marketing**

Business instrument to simplify and plan processes in order to increase demand for products and services.

## Q

### **QR Code**

Code that stores information in a matrix of dots or two-dimensional bars. QR stands for Quick Response.

## R

### **Reservation**

Contract or agreement booking a service at a given date and for a specific period of time.

## S

### **Soft power**

Persuasive approach, typically involving the use of economic or cultural influence, according to a country's foreign affairs policy.

### **Streaming**

Multimedia technology programmed to watch recorded or live content on digital platforms.

## T

### **Tax incentives**

Tax payments reductions or exemptions granted by governments to encourage investment and economic activities.

**V****Virtual Reality (VR)**

Technological interface that creates an immersive virtual environment out of simulated scenes or places.

**Virtual tours**

Virtual environment tour through the interaction with digital devices.

# 7. Table of Projects Discussed

Company / Project	Country	Type of project	Pages
Air Pano	Russia	Online project	31
Inter-American Development Bank	International	Cooperation agency	4
Bloom Consulting	Spain	Research agency	16
Budget Direct	Australia	Consulting firm	36
Cataratas de Iguazú	Argentina	Natural Park	31, 34
Conecta Turismo	Chile	Online project	24
Consejo Latinoamericano de Marcas País (COLATAMP)	International	International initiative	39
Corporación de Fomento de la Producción (CORFO)	Chile	Public entity	24
Secretaría General Iberoamericana (SEGIB)	International	NGO	13
Federación de Empresas de Turismo (Fedetur)	Chile	Public entity	40
<i>Forza Horizon 5</i>	United Kingdom	Video game	46, 48
Islas Galápagos	Ecuador	Natural Park	31
JAMPRO	Jamaica	Public entity	44
Machu Picchu	Peru	Archaeological site	31, 34
Museo de Arte de Sao Paulo (MASP)	Brazil	Museum	31
Museo de Arte Precolombino de Cusco	Peru	Museum	31
Museo del Prado	Spain	Museum	34

Company / Project	Country	Type of project	Pages
Museo del Louvre	FrNewzoo	Museum	34
Netflix	United States (International)	Streaming platform	36
Newzoo	Netherlands	Consulting firm	32
Organización de las Naciones Unidas para la Educación, la Ciencia y la Cultura (UNESCO)	International	NGO	8, 10, 20
Organización Mundial del Turismo (OMT)	International	NGO	34
Organization for Economic Co-operation and Development (OECD)	France	International initiative	44
Place Branding Association (IPBA)	Netherlands	Consulting firm	35
ProColombia	Colombia	Public entity	22, 34, 39
PromPerú	Peru	Public entity	25
Red Brasileña de Film Commissions (REBRAFIC)	Brazil	International network	44
Reunión de Ministros de Cultura del MERCOSUR (MERCOSUR Cultural)	International	NGO	13
Ruta N	Colombia	Consulting firm	45
Servicio Nacional de Turismo (SERNATUR)	Chile	Public entity	9
SIGO Turismo Tecnología	Chile	Online project	24
Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas (SEGITTUR)	Spain	International network	26, 45
Tequila	Mexico	Smart city	26, 39, 43, 45
TurismoIN	Peru	Online project	25

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