

• WHITE PAPER ON MUSIC AND TOURISM •

MUSIC IS THE NEW GASTRONOMY



YOUR GUIDE TO CONNECTING
MUSIC AND TOURISM,
AND MAKING THE MOST OUT OF IT

In partnership with



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This white paper is written for you. Wherever you live, whatever you do, music is a tool to create connections, develop relationships and make the world a little bit smaller. We hope you use this as a tool to recognise the value in bringing music and tourism together.

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Music is the New Gastronomy: White Paper on Music and Tourism – Your Guide to Connecting Music and Tourism, and Making the Most Out of It

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Dear Reader:

This is the first report that specifically looks at music among the primary drivers of tourism. While we all enjoy music when we travel, never has music been regarded as a catalyst for tourism. Music as a tourism driver ranges from individual experiences to festivals or music heritage and the use of music videos to promote and share local culture and local experience.

This is the first report of its kind, offering experiences from all over the world on how music is a tool to enhance your destination and better tell your story. Currently, the music industry - from streaming to live music - is growing at twice the rate of the global economy. In the field of arts, music across all genres has the undisputed power to generate a sense of unity and openness. Music enhances traditional ceremonies and transcends the moment it was experienced, engraving itself in our memory. Most importantly, music is ubiquitous.

Working with our partners ProColombia and Sound Diplomacy, we hope these case studies, lessons and experiences help you approach your music offer from another perspective, adding a distinctive and unique value across your entire tourism potential.

Enjoy the read.

ZURAB POLOLIKASHVILI
SECRETARY-GENERAL, UNWTO

FOREWORD

Wherever you live, wherever you work, music is around you. Sometimes you don't realise its prevalence, its ubiquity, but it's there. Behind the scenes, in the background or in some cases, front and centre stage. Music is our only universal language. We all speak music.

However, in the world of tourism marketing and destination development, music is often seen as the backing track, rather than a tool to be used - front and centre - to introduce destinations, experiences and create stories. Music tourism - as a specific sector of the tourism sector - is emerging, but not wholly understood. Unlike gastronomy or cultural tourism, music tourism is less defined, less organised and as a result, less lucrative. We believe this should change.

Similar to Chris Gibson and John Connell's seminal academic study, *On the Road Again*, this report's objective is to discuss a music tourism as a touristic, destination-marketing category, so it is thought of in the same regard as gastronomy or the cultural tourism.

Last year, ProColombia debuted their global music tourism brand, focusing on music as the primary driver to increase visitation to Colombia. Colombia has a wealth of music genres, each with their own unique story to tell, and exploring, explaining and uncovering these has led to an increase in

inbound tourists. In the same year, Sound Diplomacy launched a conference dedicated to exploring music tourism, the Music Tourism Convention in Liverpool, UK. This was followed with another edition in Franklin, Tennessee, USA and attended by hundreds of operators, tourism boards and destinations, all realising that by focusing on and leading with music, new stories could be told and new experiences created.

But to expand and fully capitalise on music tourism - wherever you are - more knowledge is needed. We need to try to define what music tourism is, why it matters and outline case studies that demonstrate the value of music to the tourism sector, and how it can be monetised to increase visitor numbers, hotel stays and other indicators. This is what this white paper, produced by ProColombia and Sound Diplomacy in partnership with the World Tourism Organization, aims to do. We hope this provides inspiration to better realise and capitalise on your music tourism assets and show you that around the world, from Australia to Mississippi, music tourism is increasing numbers, bringing people together and driving tourism revenue.

So here we go. Music is one of the best resources you have to drive tourism. We know it. And you will soon too.

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EXECUTIVE SUMMARY

Music makes you travel. The moment that you hear a song, or a piece of music and it catches you off guard, surprises you, entices you, your experience is heightened. Whether at an airport, in a restaurant, walking down the street or at a concert, music is ubiquitous; it is there, whether you know it or not. And while myriad examples exist, from creating a tourism destination based on the lyrics of an Eagles song in Winslow, Arizona to a random bust of Frank Zappa in Kaunas, Lithuania, the role of music in boosting tourism, supporting better experiences and bringing people together through travelling is still not well understood. There is no scholarship, or body, dedicated to better utilising and supporting music tourism experiences. There is no guide to music tourism, or a definition of what it is and is not, to ensure destinations maximise their music offer, and travellers have a better experience as a result. This is why we have written this white paper.

Travelling is not only about transporting yourself physically to a place but also your intellectual, emotional and, for some people, spiritual journey when you visit a destination. According to Skift, travellers today are increasingly drawn to travel as a form of self-actualization and personal transformation and growth [...] the travel they are seeking is an experience of the world that goes deep – one that changes them in ways they may not even be aware of.¹ Connecting the outer journey with the inner journey is the secret of great travel.

There are many ways travellers connect with the nature, culture and people of the destinations they visit. They connect, for example, through conversations, history, literature, gastronomy or, in this case, music.

But music, unlike heritage, gastronomy or literature, is unexplored in this context. If this was strategized into itineraries and trips,

the power of music and its impact on other experiences and sectors would increase, which would drive greater revenue across the tourism sector. Simply put, more music would equate to more business opportunities for the tourism sector while enhancing travellers' experiences.

Music tourism can contribute to the achievement of the Sustainable Development Goals (SDGs) specially Goal 8, Target 8.9 "by 2030 devise and implement policies to promote sustainable tourism which creates jobs, promotes local culture and products".

In this White Paper we draw lessons from the work UNWTO and other agencies have done with gastronomy tourism, as this has become a central part of why people travel². Music, like food, cuts to one's soul.

Some of the key findings and conclusions of this White Paper are:

1. Music is everywhere. You have it. We promise.
2. Music encapsulates both heritage and living culture.
3. Music is our universal language.
4. Music impacts every marketing initiative - in print, online and in person.
5. Music increases heads in beds.
6. Music has a long value-chain, encompassing travel, hospitality, logistics, lodging and many other sectors.

Music impacts us physically and mentally and is a language that all of us speak. And it has the potential to become the new gastronomy in travel as a means to enrich travellers experiences. If music is built in to tourism strategies rather than bolted on after the fact, it will open a new field to develop tourism products and use music to its full potential to promote destinations, brands and companies.

So let's start now.

This is your starting point for music tourism. Written by Sound Diplomacy and ProColombia in partnership with the World Tourism Organization.

We look forward to exploring and expanding on the role of music in your tourism strategies and portfolios.



1. INTRODUCING MUSIC TOURISM

1.1. WHY MUSIC?

Our brains react to music in the same way no matter where in the world we are born. This is a very important fact. It's this shared ability that has enabled us to become the dominant species. It's this innate response to music and rhythm that helped our ancestors to start communicating with each other, to bond with each other, to develop language skills and form communities. Music has played a central role in the development of the human species. The evidence of this early use of music is still visible today through traditional songs and dances that nations have performed for generations.

The body of scientific evidence regarding the positive effects of music on the brain is now too large to ignore. For instance, musical participation in childhood promotes the development of many regions of the brain, including those responsible for language. Neuroscientists can correctly identify the brain of a musician just by looking at brain scans. Music exposure, especially during our youth, results in lifelong effects in our brain. It engages multiple regions of the brain concurrently, thereby giving a widespread neural workout and numerous neurochemical and plasticity benefits. As well as the beneficial effects of music on brain efficiency, research has also repeatedly demonstrated how listening to music results in precise neurochemical responses such as the

release of dopamine (making us feel good) and oxytocin (promoting social emotions and bonding).

This white paper is naturally not intended to provide a deep scientific explanation of the effects of music on human behaviour. But it's important to acknowledge that music tourism works primarily because of the undisputed fact that music (in the same way as food) can automatically trigger the chemistry of the brain's reward system. It makes people feel good and helps deliver meaningful experiences that leave lasting memories.



Research has shown that music from our youth leaves a particularly strong and lifelong imprint on us. The health sector is acknowledging that the many neurological and physiological effects of music can be harnessed to successfully engage people and deliver wellbeing interventions. Singing, dancing, creating, performing and listening to music deliver exceptional health and wellbeing results.

Similarly, the tourism sector can benefit from harnessing music. Destinations that are already reaping the rewards of music tourism, like Colombia, have recognized that there are actually two distinct opportunities.

Firstly, when we consider that popular music has now dominated the global airwaves since the 1950s (and continues to do so) we realize that good quality popular music themed experiences can attract tourists from all over the world. At least three generations have now grown up in a world where popular music thrives. Classical music can also successfully be used to deliver music tourism revenues but popular music now matches the cultural tastes of the masses. These lifelong popular music tastes can therefore be commercialized extensively due to the sheer size of the target market that they appeal to.

Secondly, the traditional music of local communities continues to exist and can help deliver authentic environments and experiences that are specific to the destination and successfully promote its historic and cultural background.

People of all ages are seeking to enjoy these sorts of music based experiential opportunities today more than ever before. Most importantly, they are prepared to pay for them. Thus, music tourism opens multiple opportunities for destinations of all sizes all around the world.

1.2. MUSIC AS A MEANS OF COMMUNICATION

Arnold Schoenberg used to say “music is not sounds but ideas.” Music is a language just as English, Chinese or Spanish, but one that communicates at the emotional, rather than the rational, level. People do not have to understand music in order to feel it and, therefore, it has the power to create strong connections with people from around the world irrespective of their culture or language. Music can be rationalised by reading the lyrics or the music sheets but it is not necessary. We do not need to learn how to speak and write music in the same way we need to learn other languages. There is where its power lies.

Music moves us. Music opens up ways to communicate that no other language can.

Music creates spontaneous experiences. Music surprises. And music is everywhere. Around the world, music is bringing people together, creating new revenue streams and opening up cultures to communicate, learn and experience. But music has never been taken as the primary reason that we travel.

Music tourism packages exist, from experiencing America’s Music Cities with AARP,³ or visiting electronic music festivals with Beats Travel.⁴ But unpacking our music history, heritage, experiences and stories can uncover new means to share stories, develop travel packages and expand one’s tourism offer. For example, the remote Indonesian Maluku islands are where some of the origins of Hawaiian music lie.⁵ However, there is no recognised structure to tell that story on the islands, which would generate jobs, demand for accommodation, food and other amenities. Tahiti, for example, experienced a boost in tourism numbers thanks to Disney’s Moana movie.⁶ If more of us explored the heritage of its music, it would create more opportunities for other destinations.

1.3. INTRODUCING THE MUSIC AND TOURISM INDUSTRIES

1.3.1. What is the music industry?

The music industry is wide ranging and diverse. It encompasses live music, recording, publishing, marketing, brand management, education and health and wellbeing. From a music therapist to a lighting rigger, jobs in the music industry are wide ranging.

The music industry consists of:

Artists, managers, promoters, booking agents, riggers, sound and lighting professionals, movers, producers, recording engineers, luthiers, piano tuners, choir directors, singers, music educators, music therapists, MCs, DJs, radio presenters, radio producers, lawyers, accountants, publishers, sheet music manufacturers, software developers,

acousticians, Blockchain technology, VR and AR experiences, arena managers, cleaners, bartenders, security guards, designers, music tour guides, and so much more...

The music industry is the mechanical and industrial processes of making, marketing, selling and consuming music. Within the creative and cultural industries, music is one of the most in-demand artforms worldwide. According to the International Federation of the Phonographic Industry (IFPI), 96% of internet users consume licensed music⁷ and 95 out the 100 most watched videos in YouTube are music videos.⁸ Spotify, the world's largest music streaming platform, just exceeded 80m paid subscribers, in July 2018.⁹ This means the consumption of music, as well as the creation of music, has never been greater.

There are a number of jobs and roles in the music sector, many of which are in growth. For recording music to facilitating rehearsals and recording, to marketing, managing and administrating music, to performing, staging or organising live music, to using music in film, TV, advertisement, VR and games, the music industry is as broad as any other creative and cultural sector. It has many touch points and impacts. When music is used in anyway, the creators of that music and those who perform on the track get paid. With music usage up, revenues to creators are up as well. As a result, the music industry is growing at a rate double that of the global economy.¹⁰

More people are listening to music. More people are attending concerts and festivals and more markets from all over the world are opening up as music destinations. From famous festivals in the United States and Europe to more niche, new offerings such as the Petronio Alvarez Festival in Cali, Colombia and the YouTube FanFest in Saudi Arabia, music consumption is increasing everywhere.

There is a clear connection between music and tourism. The most recent example is the 45% increase in the intent of travel to Puerto Rico as a result of the success of the song Despacito by Luis Fonsi last year.¹¹ Also, the Americana Music Triangle in the United States

welcomes 40m visitors a year, worth 9bn to the local economy.¹²

Music is already a reason why people travel and explore new destinations. According to the UK Music's 'Wish You Were Here' 2017 report, "music tourists generated £4 billion in direct and indirect spending in 2016 by flocking to concerts and festivals across the UK – a rise of 11% on the £3.7 billion they spent in 2015". This included festivals, large concerts and exhibitions, including the David Bowie exhibition at the Victoria and Albert Museum, which was one of the museum's most popular exhibitions ever recorded.

- The global music industry grew 8.1% in 2017, its third consecutive year of growth.¹³
- It is worth \$17.3 billion USD.
- Streaming grew 41.1%, led by a 45.5% growth in subscriptions for streaming services.
- Digital revenues were up 19.1% and now comprise over half of the entire recorded market revenues, while physical revenues are still in decline.
- Latin America (17.7%) and North America (12.8%) saw the biggest growth in their markets.
- Streaming is unlocking markets previously unavailable, and record labels are using it as a tool to build followings in previously-untapped countries rather than waiting for natural growth.¹⁴
- Millennial attendance of music festivals nearly doubled between 2016 and 2017,¹⁵ largely attributed to the escapism factor of multi-day, multi-experience festivals.
- US festivals draw 32 million people each year.¹⁶

1.3.2. What is the tourism sector?

Like the music industry, we underestimate the size, scope and value chain of the tourism sector. It represents 10% of the global GDP¹⁷, 1 in every 10 jobs (direct, indirect and induced jobs)¹⁸ and 7% of world exports¹⁹ and it is one of the fastest growing economic sectors that encompasses hundreds of jobs and skills.

As of 2017 international tourist arrivals worldwide grew by 7% to 1,326 million generating US\$1.6 trillion in export earnings²⁰.

The tourism sector is highly segmented and specialized, from domestic and international, to leisure and meetings and within these two latter, a realm of products unfolds giving relevance to the purpose of travelling (culture, sun and beaches, nature and adventure, cruises, bird watching, urban tourism just to name a few), defining diverse channels of distribution and certainly characterizing the traveler. UNWTO defines tourism as the activity performed by people traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure and not less than 24 hours, business and other purposes.

The tourism sector consists of tourism industries defined as tourism activities that typically produce tourism characteristic products²¹. These industries are:

- Accommodation for visitors
- Food and beverage serving activities
- Railway passenger transport
- Road passenger transport
- Water passenger transport
- Air passenger transport
- Transport equipment rental
- Travel agencies and other reservation services activities
- Cultural activities
- Sports and recreational activities
- Retail trade of country-specific tourism characteristic goods
- Other country-specific tourism characteristic activities.



Besides these many other activities can contribute to the tourism value chain indirectly such as audio-visual activities, museums, parks and attractions, convention centres, destination marketers, tourism boards, tour guides, chefs, farmers, cleaners, security guards, marketing professionals, designers, and other related activities.

Both the music industry and the tourism sector have a great potential to create jobs while sharing the same objectives of creating long lasting, memorable experiences. We propose to take the most out of this by better understanding and developing the alliance of both.

1.4. MUSIC + TOURISM = MUSIC TOURISM

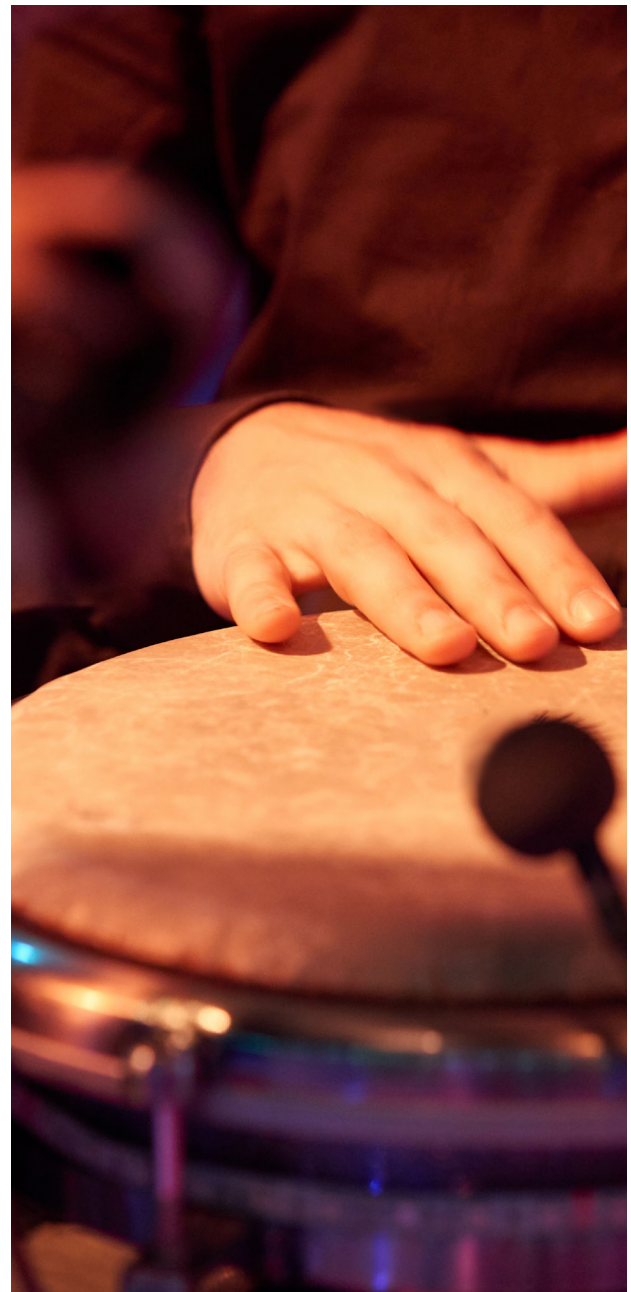
What is music tourism? To answer this, we propose the following definition for discussion:

“Music tourism encompasses any activity undertaken by a tourist where the primary motivation to travel is music related”.

It is often very difficult to differentiate, or separate music tourists from other tourists. Those who visit a music museum will also experience other activities, from local restaurants and bars, to other cultural attractions. A concert goer who visits London to see a show at the O2 may also visit the British Museum, Tate Modern or the VA Museum. And they are also likely to experience local restaurants, stay in hotels and take mini-cabs or public transport. The intention of this white paper is not to separate music tourism from other forms of tourism - as our experiences when we visit places are interlinked, but to better highlight the intent of travellers to pick and choose destinations due to its musical offer, be it permanent (a culture, museum, trail or music scene) or ephemeral (a concert or festival). The role of music on travellers decision to book is not well understood and music remains an add-on, rather than a primary justification for the tourism sector.

As we will see in the section on case studies, music tourism is increasing worldwide. Brand USA are using music as their primary tourism driver in 2018 and 2019, following Pro Colombia's use of music in 2017. More companies are offering bespoke music tourism experiences, from Beats Travel to Spain Live Music, Travel for the Arts and Loudwire. LastMinute.com has created a bespoke music tourism portal - to be outlined later - that links destinations with artists offering recommendations and experiences and other brands, including Red Bull, Smirnoff and Burberry, use music as a tool to tell their story and create unique experiences.

To capitalise on this growth, we need to understand music tourism as one of tourism products. As defined by UNWTO, a Tourism Product is “a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific centre of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle”²². Music is a reason people travel.



Music tourism is on the rise:

- Colombia has developed an international tourism campaign focusing on music as an expression of its cultural richness and diversity. They have produced 13 music videos from the country's different regions with more than 20 Colombian renowned artists. One of campaign's songs has been nominated for a Grammy award.
- In 2016, Music tourism attracted 823,000 overseas tourists in the UK, supported over 47,000 jobs and generated £4 billion²³.
- Portugal and Spain have seen a 500% rise in music tourists since 2014, mainly for festivals. Norway's rise is over 400%²⁴.
- Split, Croatia and Lisbon, Portugal, have seen meteoric rises in music tourists, by over 100x over the past 5 years ²⁵.
- Music festivals are becoming a main tourism driver in Thailand, according to CNBC, so much so that companies, such as GigLife Asia, are being set up to develop music tourism packages ²⁶.
- The average music tourist spends a minimum of \$300 USD on travel costs²⁷.
- Music festivals were a 2.3 billion USD global industry in 2016, a figure expected to double in 2020²⁸.



2. MUSIC AND LEISURE TOURISM

2.1. INTRODUCTION

Music is a key component in the development of a wide ranging and varied leisure tourism strategy. Whether an active part of a trip - such as going to a music festival - or something that enhances one's experience in the background - such as a jazz pianist at a local restaurant - music is embedded in leisure tourism, and as such should be strategized more across this ecosystem. Music integrates well into creating experiences and tours that focus on cultural heritage, diversity and local engagement. It also embeds well into both heritage tourism and the exploration of living culture, across towns, cities and rural areas.

This chapter outlines a number of components and examples that elaborate on the relationship between music and leisure tourism, to demonstrate that they are, in fact, closely linked. It proposes a 4-step guide on how to drive tourism using different music-related assets.

2.2. MUSIC TOURISM EXPERIENCES

Experiences are all-encompassing, offering tourists access to things they may not have otherwise found themselves or had the experience to coordinate. It is an easy way to package up the best of what an area has to offer and pick and choose exactly what you want to showcase to visitors. It lets grassroots initiatives and small businesses shine by getting them into the itinerary creating opportunities for jobs, especially among the youth, as well as the promotion of local culture.

StarVista Live and Sixthman are the leaders in music cruises, ranging from single artist themes or entire festivals at sea.²⁹ Fans

get the chance to spend the entire journey in close confines with artists, seeing them during dinner hours or in the halls, as well as attending intimate programming throughout the trip and, of course, visiting ports.

Many travel agents offer tours of the world's music scenes, from Liberty Travel's 'Music Cities: Nashville and Memphis Escorted Tour' and STA travels 'Beats' series, which takes group travel packages to festivals and underground scenes around the world.

As part of Colombia's tourism promotion campaign which, as has been said, concentrates on music, ProColombia, the country's tourism board, has designed, in



partnership with tour operators and travel agencies, music tours around the country. One such tour takes people to different cities and towns to learn how rhythms are created, instruments designed and built, take part in gigs and learn how to dance.

The tour is accompanied by Gregorio Uribe, an expert musician from Berklee University, who brings value to the tour by sharing his musical knowledge and giving meaning to the different types of experiences.³⁰

Music can also be integrated into adventure travel. People can connect with nature not only through the visual enjoyment of a beautiful landscape but also through the sense of hearing. Soundscapes are increasingly becoming a form of enjoying and understanding nature. While not technically considered music, bird songs, for example, are the principal way in which expert birders identify and discover birds. More recently Bernie Krause, an American musician and soundscape ecologist, coined the term biophony, which refers to the collective sounds in a given environment.³¹

Wellness activities such as massages and other therapies, healthy eating, sports activities, meditation or yoga often incorporates music. Music is closely linked with mood. Certain types of music can make us feel sad, happy, relaxed or energized. According to Chinese medical theory people's 5 internal organs and meridian systems have corresponding musical tones, which are used for healing purposes.³² There are opportunities for incorporating music and music therapy as part of the wellness tourism offer.

No matter what product you are interested in, music is an underlying element that can help connect travellers with a destination and can contribute to make trips increasingly meaningful, memorable and transformative.

2.3. YOUR MUSIC TOURISM TOOLBOX

Every city, place or destination has something associated with music to offer visitors, whether they have a world-renowned festival or not. Nothing starts by being famous. It is the continued marketing (active or through word-of-mouth) and circumstantial events which make a place and its programming famous or significant.

Boosting music tourism starts with identifying music-related assets such as recording studios, instrument factories, luthiers, records shops, musicians' childhood homes, musicians' gravesites, museums, sites of artists' first performances, grassroots music venues, arenas, stadiums, festivals, bars, nightclubs, street performers (also called 'buskers' in some countries), theatres/opera houses and dancing venues.

There are several ways that destinations can drive tourism revenues from music. Here are six steps to help guide the process:



Bogotá - Colombia

STEP 1

Examine whether your destination has any form of music history that could be successfully leveraged.

It is important to note that this musical history can be very varied and sometimes from the outside seem rather weak and yet still be successful if implemented well.

For example, Salzburg, Austria does a marvellous job of celebrating its famous links with Mozart who was born and grew up in the city. However, the city was also the location of 'The Sound of Music' one of the most successful musical films of all time. You might think that the target tourists for these two examples are different. But in fact, 'The Sound of Music' was released over 50 years ago and so the original fans of the film are now aged over 55. According to music taste research and music sales data, this tends to also be the same demographic that is most likely to engage with classical music. So it is likely that the tourists who flock to Salzburg from around the world to experience 'The Sound of Music' tour will also visit the Mozart museum whilst in the city. In addition, 'The Sound of Music' tour tends to be popular with families because original fans of the film also years later watched it with their children and their grandchildren. So this classic film now has a multi-generational appeal. This helps draw a broader age range of tourists than classical music themes alone.

Your destination does not necessarily need to have had a famous musical resident or need to be a city. These principles work for settlements of all sizes. Matala, a small remote fishing village in Crete, Greece, has very successfully leveraged its links with the renowned American singer-songwriter Joni Mitchell who once stayed in a cave on the beach in the early 1970s. She wrote a song about the village that features on her critically acclaimed album 'Blue'. This will be discussed in more detail as a case study later in this paper. Similarly, Folkestone, a town in South East England, recently recognised its unique links with the legendary Jimi Hendrix Experience. In 2017 a new weekend event

titled The Hendrix Weekend was launched as a marketing campaign to leverage this asset and draw visitors to the destination. Hendrix visited the town several times in the mid-1960s, the band performed one of their earliest gigs there and bass player Noel Redding was born and lived in the town. Hendrix wrote the song 'Fire' about one of his visits to Folkestone. Hendrix is still considered one of the greatest and most influential rock musicians of all time. This is a rich asset that can be leveraged through the continued development of this annual event.

Berlin, Germany, is also now tapping into its historic links with David Bowie. Music tours taking tourists to his former home, the places he used to hang out and Hansa Studio where he recorded his famous song 'Heroes' have started to attract media coverage and tourists. Berlin also houses the world's largest Ramones museum, The Ramones Cafe, featuring a collection of memorabilia collected by a fan of the band through his lifetime.

STEP 2

Examine whether you could leverage a music-based theme that is unconnected to your city.

You do not need to have an iconic music history to be able to leverage music. Tourists seek great music experiences. If you can provide great music experiences then you can build a music tourism strategy around it.

For example, Porthcawl in South Wales, United Kingdom, is not regarded as an international tourist destination. But the town's annual Elvis Festival now in its 15th year draws 35,000 visitors. It labels itself as the largest Elvis Festival in the world and has successfully built this music tourism success story despite having no links with Elvis whatsoever. The town simply creates a totally immersive Elvis environment for an entire weekend and consequently enjoys the significant commercial revenues that result. The weekend is so successful that the team also launched a version in Benidorm, Spain, in 2017.

On the other side of the globe in Australia, Parkes, a town in New South Wales, has also been successfully celebrating the life and music of Elvis Presley at its annual Elvis Festival since 1993. The event doubles the local population during the weekend and drives significant revenues and profile for the town. It has now expanded from a one day event to a five day event and continues to grow each year. Nearby another town in New South Wales called Trundle took inspiration from Parkes and in 2011 launched an annual ABBA themed festival. This too has successfully become a growing annual event that drives commercial revenues, raises the profile of the town and attracts visitors from around the world.

A Northern Soul scene in Kobe, Japan is also attracting increasing international media attention due to its unlikely connections with the genre. Originally started in the mid-1990s by local DJs who had visited the United Kingdom, this scene now includes several venues and events throughout the year that prove popular with both locals and tourists.

STEP 3

Identify and segment consumers for the different types of music of your destination

The fact that the large majority of people like music does not mean that they all like the same music. That is why it is so important to methodically identify and segment your potential clients. A group of millennial women may be interested in learning how to dance salsa in Cali, Colombia, the world's capital of this music genre, an X generation group of friends might be looking for a U2 or Depeche Mode concert in Berlin or London and an elderly couple may be interested in attending the opera season in Vienna or Verona.

The segmentation process supposes and in-depth understanding of the consumers of different types of music. Such segmentation must follow not only demographic criteria such as age, gender or nationality but rather psychographic criteria such as the wishes,

desires and aspirations of a specific group. It should include an analysis of their travel style, the core activities they are interested in, their seasonality preferences, their trip duration preferences, their price ranges, their booking channels and their cultural expectations. It should also include an analysis of their 'gain' points and their 'pain' points.



STEP 4

Design music tourism experiences based on segmentation

Once you cover steps 1, 2, and 3 you will be in the capacity to design music tourism packages for your specific visitors. Such packages may include visiting museums, residences or venues associated with famous artists, engaging with local artists to learn about the inspiration for their music, recording music at a production studio, visiting a local luthier, taking dancing lessons of a preferred genre, attending a concert or dining at a restaurant with live music.

When designing music experiences there is ample space for creativity. Music will help create that emotional connection with the people of a specific place or destinations and, hopefully, will contribute to leave in travellers an indelible mark that will last for years.



Bogotá - Colombia

STEP 5

Build a strong marketing campaign and brand identity / design around the theme

Once you have identified a music theme start building a strong visual identity around it. The Matala Festival mentioned above was designed to leverage its 1960s and 1970s history when it became a destination for youngsters who were travelling the 'hippie trail' to India. The visual identity, developed by UK experiential company Found in Music in partnership with the Mayor of Festos, drew on that era in its design. The logo represented the flower power and peace and love ethos of the time and the font referenced the shape of the caves in the beach cliffs where the young hippies (including Joni Mitchell) stayed while passing through.

STEP 6

Expand your campaign to embrace all the existing music assets in your destination

As a destination you should also ensure that your music tourism strategy embraces the existing music ecosystem. Promote your local music venues, museums, and festivals

within your music tourism marketing. This strengthens your overall offer at no extra cost by harnessing the talents and efforts of your local music entrepreneurs to help them thrive and collaborate. One single combined voice is louder than many small voices. Organise your local music assets into an articulated music tourism campaign.

London has recently begun this process with the launch of its www.music.london website. Although at present it solely features the music tourism campaign titled Sounds Like London that ran for the first time in June 2018. The website is intended in the future to provide a yearlong promotion of music in London and be directed at tourist audiences in partnership with Visit London.

This six-step process outlines how a music tourism marketing campaign can be envisaged, developed and initiated. Later in this report we further expand on this six-step process, offering further examples of successfully utilising music across national, regional, local and place-based destination campaigns.

2.4. SUMMARY

Your music is embedded in your tourism offer. So remember:

- Examine your music heritage and recognise its value to the whole destination and experiences.
- Music experiences and heritage is everywhere. You just might not have recognised yours yet.
- Develop local strategic partnerships to use music to add value to other experiences.
- Ensure that you are telling a story to invite tourists and visitors to share this story with you and local communities, through music.
- Do not forget about local talent and living culture. They are your future heritage.
- Festivals produce many opportunities to extend stays and experiences and increase spend. Work to create packages that celebrate your local festival but offer additional activities around it.
- Everywhere has music. Everywhere has music tourism. Uncover and celebrate yours.



3. MUSIC AND MEETINGS: CONFERENCES, CONVENTIONS, FESTIVALS

3.1. INTRODUCTION

Understanding that you have a music tourism product is one thing. Now, ensuring it is incorporated into your meetings, conferences and festivals strategy is another. Around the world, cities and places are competing to hold conferences, festivals, meetings and conventions. In most parts of the world, Visitors and Convention Bureaus are competing with each other to attract larger delegations,

crowds and sectors. Conference centres are part of most major offers, from Houkou in China to Singapore, and from Indianapolis to Medellín, Colombia.

Developing a music tourism plan within a Convention and Visitors Bureau strategy is multi-faceted. Music-specific initiatives, such as festivals, gatherings and music conferences



are important, but are only one aspect of how you can use music to make your destination more attractive. Much of the work at conferences, from those focusing on global policy affairs to those featuring technology, medical or other professionals, happen in the bars and restaurants after the event, in its networking events and extra-curricular activities. The more organised a city is in developing, promoting, managing and supporting the experiential requirements of a conference attendee, the more thinking about and prioritising music becomes attractive. Music establishes moods, supports communication across language and is a tool to support, and increase, the takings of a food and beverage premises, be it a bar, restaurant or nightclub. Music experiences, especially in places that trade on their music heritage and offer, are what attendees remember most.

Moreover, music festivals are extremely lucrative economic drivers for local economies, and their value chain is significant. From transport to logistics, hospitality to support staff, festivals can create year-long jobs, drive ancillary tourism and create opportunities for an area's restaurants, shops, hotels, airports and other businesses.

To best outline how your music tourism offer impacts your events and meetings business, we have outlined a number of case studies and examples to take forward, to increase the value of music, attract more events and improve your communities. This section will outline the value of festivals themselves, the relationship between hotels and gastronomy, the impact of music on conventions and meetings and following that, outline lessons to taken home.

3.2. THE VALUE OF MUSIC FESTIVALS

Around the world, music festivals are creating more revenues streams, value chains and recognition for destinations around the world. For example, in Indio, California, United States of America, the Coachella Valley Music and Arts Festival, brought in 114.5 million USD to the local and regional economy.³³ And visitors travel for festivals. On average, people travel 903 miles to go to a music festival in the USA³⁴, and there were 32 million visitors to festivals in the USA, nearly 1 out of every 10 citizens³⁵.

Festivals are tools to increase public and private partnerships. 1.34 billion USD was spent by corporations sponsoring music festivals in 2014.³⁶ And it is not just big festivals. A small experience or one stage in a field can create a lasting travel experience. Take G Festival in Gota, Faroe Islands for example. It is one of the leading marketing products when one visits their local tourism website,³⁷ and boasts that a tenth of the population attends. Those who attend often stay longer to experience the island, its food, accommodation and eco-tourism.

City festivals taking place in multiple venues, bars and restaurants in a central entertainment district also drive tourism and increase visitors. SXSW in Austin, Texas, USA generated 350.6 million USD (240.2 direct, 61 indirect and 49.4 induced) for the city's economy in 2018, and sold out hotel rooms for over two weeks, both before and after the

event.³⁸ In 2018, over 75,000 people from 102 countries attended SXSW.³⁹

In addition, well managed festivals can beautify local areas and create new opportunities for both the local community and new visitors. Lollapalooza pays 1.5 million USD every year to the Park District for park maintenance and improvement, as well as a percentage of net tickets sales, which goes up each year. By 2021, the festival will be paying the government over 5 million USD per year.⁴⁰

Most destinations have festivals but focusing on utilising the music offer more across your tourism offer can create further added value across your tourism economy. From increasing signage at airports, bus stations and cruise terminals, to creating playlists to introduce a certain form, genre or type of music to visitors, to partnerships with local restaurants and hotels, strategizing one's music festival offer across one's tourism portfolio increases revenue and promotes longer stays. For example, one of the key beneficiaries of music festival tourism is hotels and lodging.

3.3. THE VALUE OF MUSIC FESTIVALS ON HOTELS AND LODGING

Music festivals create demand on hotels and lodging. And this happens year-round promoting policies to fight seasonality and an opportunity to disperse tourists from main hotspots. For example:

- Coachella and Stagecoach festivals created 3,000 new jobs in the Indio economy during their run.⁴¹
- Hotels in Indio see profits increase by up to 30% during Coachella and Stagecoach festivals due to their ability to raise prices on rooms.⁴²
- 12,900 SXSW attendees booked over 53,000 room nights at local hotels, generating 1.8 million USD in occupancy tax alone.⁴³
- An estimated 3,000 people pay for local accommodation during Glastonbury, spending anywhere from £50-£3,000 per person.⁴⁴



International Music Festival, Cartagena

Hotels can also host live music events as a means to attract visitors who may or may not be staying in their premises. Brands like Hard Rock, Aloft and Selina are examples of different styles of accommodation that offer regular concerts to their customers. Selina even has a professional recording studio as part of a co-working space.

Hotels also use music as a promotional tool. Hotels such as Renaissance and Hilton are offering rewards members exclusive concerts by popular artists such as Nick Jonas or Paramore, live-streaming the shows to those that can't attend.⁴⁵

W Hotels has its own mini-festival, which it travels around to locations in Los Angeles, Barcelona, Bali and Dubai and hosts up to 3,000 people for a 'more intimate festival experience without the mud.'⁴⁶

A more recent and innovative idea is City Sounds 360, a partnership between Fender and Room Mate hotels that combines technology with local artists in Spain to create a virtual reality experience for guests.⁴⁷

3.4. THE ROLE OF MUSIC ON GASTRONOMY

Music and gastronomy go hand in hand. Music tourists from past generations filled the bars of Kansas City, New Orleans and other cities to watch live jazz or a pianist, from the advent and proliferation of dinner theatre. Most music tourists frequent restaurants, bars and other establishments before and after concerts and businesses in close proximity to 'where the music is' benefit greatly. For example:

- Dinner and a show: food and music have long gone hand-in-hand, from pianists playing at upscale restaurants to popcorn being sold at arenas.
- Music creates atmosphere at restaurants, can distract from waiting times, and can subconsciously make customers eat faster, thereby increasing table turnover.⁴⁸

- Gastronomy is an important part of festival culture, whether it is a generic food truck or a pop-up of a favourite local restaurant. Local restaurants get the chance to trade at festivals, and fans market their meals through social media posts.
- There are publications anticipating each year's food offer at Coachella,⁴⁹ which features chain restaurant pop-ups, sit-down restaurants from renowned chefs (which require separate tickets), and snacks made specifically to appeal to the Instagram-led generation of viral, gimmicky marketing.
- 72% of millennials at festivals are likely to go to the local shop or restaurant to purchase food/beverages they were introduced to at said festival.⁵⁰
- 99% of millennial festival-goers are likely to recommend food or drinks they purchased onsite.⁵¹



3.5. MUSIC AND CONVENTIONS

The competitive global convention business can benefit greatly by incorporating music directly into one's marketing strategy and action plan. Many large-scale global conferences, from Gamescom in Cologne to The Summit in Lisbon offer extensive music programs to entice delegates outside of the conference centre. And these are just two examples. When developing brochure and marketing plans to promote your city for conferences and conventions, music can (and often is) the deciding factor. Music, along with food, is the source of those spontaneous moments that attendees remember when they are experiencing your city, town or location, outside of the conference or convention centre. And from real estate conventions to medical seminars, film festivals to tech and SMART city events, music plays a role in differentiating your offer. Utilising the skills and networks

of local musicians add value and flavour to receptions, parties and opening ceremonies. A well thought out playlist and ambient music strategy encourages more relaxed networking. Partnerships with local music venues add value to the evening and night time economy offer.

3.6. CONCLUSION

Music is a key component to any destination aiming to enhance their festival, conference or convention strategy. Every brochure designed, web advert commissioned or marketing campaign initiated should consider music, not just to encourage more conferences and festivals to locate to your town, city or place, but to link experiences together so stays are extended and ancillary businesses benefit more from the existing trade you have. From music's role in gastronomy to the value of music festivals, your music tourism strategy should incorporate this wide range of opportunities, to not just celebrate what you have, but also plan to have more in the future.



4. MUSIC AND TOURISM MARKETING. LET US DEVELOP YOUR MARKETING PLAN

4.1. THE ROLE OF MUSIC IN TOURISM MARKETING CAMPAIGNS

Music is alive in tourism marketing campaigns from all over the world. From Colombia's Land of Sabrosura to campaigns as wide reaching as Dubai, USA, Argentina, the Netherlands and Canada, music is at the forefront. Either as a shot within a campaign of an artist performing on the street, or at a festival, to

University in Croatia, noted that "music, as part of the cultural tourist product is not well researched through models of tourist valorisation, which in tourist practice is often shown only as a niche of the overall tourist product in the tourist destination."⁵² This is not only prevalent in the creation of tourism products, but in how they are marketed.



Barranquilla - Colombia

the choice of music to support the images on screen, or online, music is a key marker for selling one's brand and vision and encouraging visitors to consider new destinations. Whether you know it or not, music is impacting you and where you choose to travel. In a paper presented at the Management International Conference in 2016, researchers Aleksandra Krajnovic and Ivana Paula Gortan-Carlin from the Universities of Zadar and Juraj Dobrila

Music, as a tool to market a product or service, is very powerful. Tourism products are the same. A music festival not only promotes its specific offering. It also promotes the experience of attending it. Festival No. 6 in Portmeirion, Wales, is a good example.⁵³ The festival, which is taking a hiatus for the time period, promoted itself as much on its location - and the tourist offer the town had - as the music. They were marketed as one and the same. And it led to it being one of the UK's most successful boutique festivals for the last few years. This is because music was strategized at the beginning and recognised for its importance in

creating an emotional response in those it touches.

In terms of marketing experiences, music, as intangible heritage, affects cultural history and has an intrinsic link to the identity of a destination. The history of rhythmic and religious chanting is part of the experience of visiting temples in Cambodia,⁵⁴ for example, just as much as experiencing a drum circle

can add unique value to a safari experience.⁵⁵ And there are package experiences for both of these, centred and structured on music. Both forms of music, steeped in local heritage, culture and experience, enhance the wider offer of the cultural experience and when strategized and marketed accordingly, increase the value of the tourism product.

Songlines, a British based magazine that covers traditional and popular music from around the world has been partnering with Imaginative Traveller to offer music tours to destinations such as Senegal, Colombia, USA and Argentina.



4.2. MUSIC, TOURISM, MARKETING AND LOCAL EXPERIENCES

Music create unique experiences because it is associated with nostalgia, identity, community, creativity, and diversity - but also with festivals and celebrations, seduction, and hedonism. Tourism marketing draws on these same aspects. Music, however, can be used to engage tourists with locals rather than put them at odds.

You would not travel to Italy to eat at McDonald's, and you wouldn't visit Dublin to drink Budweiser, so why skip over local music when taking in a place's culture? Local music is what builds a region's unique musical identity.

Tourism starts local. After all, how are you going to bring visitors in if you have nothing to offer them? Local musicians are the seeds that keep local venues open and keep the scene buzzing throughout the year, even when the peak tourist season has ended.

Local music builds a community, and it's this exact setting that tourists are looking for these days. Think of the Obonjan Festival in Croatia, for example, tapping into the 'experience' economy because fans are wanting more out of their money and time. People want authenticity, to be a part of something that feels unique and raw, unmanufactured.

Beyond this, local artists progress to become next year's headliners, drawing tourists to whatever concerts or festivals they play in other cities. They need that support to grow, hone their craft and build a following.

Music pre-exists the infrastructure of our lives as well as of the places we visit. Music is there, whether we know it or not, and is it being created, altered and improved upon by local people, all over the world. Engaging and experiencing local music - from the street to the venue, from carnival to a festival - builds bridges and leaves us with a better

understanding of the community we're experiencing. And in a world where marketing local experiences is prevalent - from eat like a local to travel like a local - experiencing music like a local is another opportunity to create a unique marketing angle for tourist products. From engaging with local open-mic and jam sessions, to promoting music venue tours or opening up famous recording studios - like Nashville has with its famous RCA Studio B premises - music creates this opportunity to engage with locals that other tourism products do not.⁵⁶

Places also provide inspiration for many artists' work; there are thousands of songs named after cities, and obviously many more that mention places in their lyrics. London, for example, is the most written about city in the world with an estimated 4000 songs written about it,⁵⁷ while travellers flock to a street corner in Winslow, Arizona, just to experience a popular lyric in a song by The Eagles.⁵⁸ There are more than 20 tourist products in Bonn, Germany specifically linked in Beethoven. Such experiences across all genres of music exist around the world, such as the San Basilio de Palenque experience near Cartagena, Colombia.⁵⁹ Music, especially popular music from around the world, often treats cities positively, as inspiring or liberating getaway destinations. From New York, I'm in Love to London Calling, music speaks positively of cities, and can be utilised to market city breaks.

In Sara Cohen's *Decline, Renewal and the City in Popular Music Culture*, she references Independent journalist Nick Coleman, who argues that "that pop is a metaphor for the city; certainly, that it is a continuation by other means of the urban mind. ...The simple fact is that pop is better on cities than on anything else, apart from love. It's taught us to be intrigued by cities, to fear them, to face up to them."⁶⁰ This is replicated in UNESCO's network of 'cities of music', for example. And each of these cities uses music to engage tourists with local experiences, and locals in general. And it is a tool that transcends culture, income, location and politics. It is the connector.



4.3. MUSIC TOURISM AND THE EVENING AND NIGHT TIME ECONOMY

Music tourism is a job incubator. When someone attends a concert, whether it is a global artist or their friend's garage band, that venue needs to support it. There will be ushers, bartenders, a sound technician (or an entire crew of technicians for large tours), a cleaning crew, etc. There are the taxi drivers or bus drivers that take them to and from the concert, the waiters that fuel their post-concert meal, the hotel receptionist or maid that attends to their room and other reciprocal industries that feel the economic effects of a concert.

Concerts are naturally associated with the night time. Even festivals starting at 10am or noon don't see their largest crowds or present their headlining acts until the end of the day, which means the majority of primary music tourism takes place at night.

Pull up any 'nightlife' filter on a travel website, and you'll be inundated with nightclubs, dancing spots and jazz clubs. Even somewhere not primarily selling music, such as a cocktail bar or rooftop bar, will at least have music playing for ambience, if not a live band. If music is not the main selling point for nightlife, it is the accompanying marketing tactic.

Travellers experiences at night are often the ones they remember the most. It is that

spontaneous street performer, or meal at a restaurant, that leaves memories that last a lifetime. Crafting a safe, friendly and hospitable night time economy that works for everyone - locals and visitors - is key to growing your tourism offer. Music is a key to this. Understanding its role, location and impact helps create that safe, memorable night out.

Don't forget that tourism doesn't always have to mean traveling halfway around the world; local tourists count, too! From people going to their nearest big city for a 'night on the town' to people popping round their local pub for some live music on a Friday night, they are doing the same activities as tourists and spending money in many of the same places.



4.4. MUSIC VIDEOS AND TOURISM-IS DESPACITO THE NORM?

Music videos have been a tool to tell stories about places, make them more accessible and open to visitors. And this has never been more prevalent than the success of Luis Fonsi and Daddy Yankee's *Despacito* and Old San Juan, Puerto Rico.

It was filmed in La Perla, a neighbourhood in Old San Juan, Puerto Rico. The barrio has become a tourist hotspot. The video reached 5 billion views in 2018, making it the most watched video worldwide.⁶¹ The song became the soundtrack to Puerto Rico's official campaign, with Fonsi licensing the song for its usage. The result was a boom in tourism and interest, with such initiatives like resident Carmen Lourdes Lopez offering 'Despacito' tours to curious tourists from as far as China and California"⁶². Saying this, it must be noted that residents were sometimes resistant to the new popularity and that the area itself has its own unique history and heritage, separate to the song. But it was the song that popularised the neighbourhood, showcasing the power of music once more.

However, after its devastation by two hurricanes, La Perla tried to reach out for aid using its ties to the song but was in general overlooked. This is a lesson that we can learn that outlines the power of music to sell destinations, but that this power must be respected and used to support the lives of locals. While Luis Fonsi expressed sympathy for residents on twitter, publicising a need for aid to almost 8M followers, the area, as with much of the country, has struggled to recover. La Perla now will be different from the one that Fonsi and Daddy Yankee filmed in, but it will forever be associated with one of the most powerful - and catchy - pop songs of the last few years, a song directly influenced by the culture, power, uniqueness and stories of those that live, work and make La Perla the community that it is.

This example showcases the power of music videos to sell destinations. Chan Chan, by Buena Vista Social Club, did the same for Havana. Lyrics mention places including Alto Cedro, Marcané, Cueto, and Mayar; towns in Holguín Province, Cuba. All of the artist's music has a distinctly Latin style that references Cuba/Latin America. This is an example of an instance where a location becomes so strongly associated with certain types of music that the sounds "became imaginary identification for place in emerging international mediascapes."⁶³ This is also seen in Hawaii, Italy, Austria, Colombia, Jamaica, and Ireland, across genres, styles and disciplines.

There are many other examples of music videos being used as tourism marketing campaigns, including Justin Bieber's I'll Show You,⁶⁴ which was shot in Iceland and has over 400m views. This video was so successful, locations were converted into a guide.⁶⁵ Moreover, Jay Z and Alicia Keys' Empire State of Mind⁶⁶ has been used as an unofficial soundtrack to marketing New York City.

But probably the best example of the use of music videos to promote a destination is Colombia. It has produced 13 music videos including rhythms from the Caribbean, the Pacific coast, the Andes, the Orinoco and the Amazon regions. The project has involved 21 artists such as Fonseca, Sebastian Yatra and Yuri Buenaventura, who sing a sample of the more than 1,000 rhythms the country has.⁶⁷

And these are popular artists, who do not scratch the surface of the breadth of artists and genres used to promote destinations through music videos. From the promotion of Bollywood to Dancehall, modern classical to traditional polyphonic choral music, music videos are effective tools to tell a story about a destination.



Cartagena - Colombia



Tayrona - Colombia



4.5. MUSIC AND PACKAGE HOLIDAYS

Music is a tool to sell package holidays, including cruises and driving holidays. In 2017, Carnival Cruise Line kicked off their 2017 cruise season by marketing lip sync battles on their ships with videos featuring lip syncer/influencer Gregg Sulkin. Carnival Cruises received a 22% lift in customers planning to travel with them; competitors dropped by 10.6%.⁶⁸ Another example is Celebrity Cruises' #destinationdemi concert experience, where they partnered with Dick Clark Productions to put on a Demi Lovato concert for their guests in St. Maarten in 2016. Artists as wide ranging as Phish and Barenaked Ladies and music companies including Blue Note and Soul Train offer cruise experiences, while specific rock and roll, metal and EDM cruises are sold across the world, from the Caribbean to Scandinavia.⁶⁹

Europcar created music based on scientific research with the intention of increasing driver safety, which they called Sounds for Driving. The songs created were available in Europcar rental cars and later released for streaming and downloading. The campaign received attention from many media outlets - including all of Sweden's daily and tabloid newspapers - and helped Europcar identify itself as the "true innovative player on the rental car market". Competitors actually got in touch with the intention of using or replicating the

music themselves, with specific playlists being used to sell car rentals and driving holidays.⁷⁰

Atlantis, the Bahamas' most popular resort, launched the Atlantis LIVE concert series in 2015, collaborating with Fifth Harmony to market concerts on social media. After announcing the campaign and during Fifth Harmony's on-property visit, Atlantis #AtlantisLIVE reached 34M impressions on Twitter. This increased all-inclusive bookings at the resort.⁷¹

Other package holidays have been further marketed through music. In Colombia, a celebration of the country's birds and birding culture led to ProColombia creating a series of unique recordings from famous Colombian artists, based on birdsongs. These songs were used to market birding holidays and specific destinations, leading to a substantial increase in ornithological tour enquiries in 2018.⁷²

And music, in and of itself, is a substantial package holiday offer. Dozens of companies offer music themed trips, to specific 'music city' destinations, festivals and other experiences. From celebrating specific artists and cities to music in holiday parks, theme parks and unique destinations, music package tours are growing as their own sub-sector. AltPress listed 11 top tours one should do in their lifetime, including experiences at Walt Disney World and a festival on the boardwalk in Asbury Park, NJ. These experiences were all in the United States, which offers a fraction of music experiences available globally.⁷³

4.6. INFLUENCERS, PLATFORMS AND MUSIC: DEVELOPING A TOURISM BRAND

From YouTube influencers to themed playlists, marketing through Shazam or Twitch or capitalising on an annual event or festival, music provides a unique opportunity to utilise cutting edge platforms to promote destinations and tourist experiences. A number of partnerships have been developed to use music to promote destinations, from Last Minute.com and Spotify to Shazam and Brand USA, to Deezer's tourist-oriented kiosks at Paris airports, creating a holiday-themed playlist for travellers who entered into the kiosk where they were going.⁷⁴ In Calgary, Canada, Tourism Calgary used local influencers to tell stories related to each of their key tourism pillars - one being music - in a campaign titled Basecamp to Adventure. The campaign was successful, including using the city's Sled Island Festival to boost accommodation bookings in the city.⁷⁵ While each partnership is different, the prevalence of them, and their impact on tourism boards, campaigns and marketing initiatives, is growing.

There are dozens of campaigns to learn from to recognise the power of music to market destinations, through festivals and conferences, linkages with gastronomy, influencers, platforms and videos. The last chapter of this white paper will conclude with a number of examples and case studies, which references the power, growth and opportunities to use music as a marketing tool in tourism. Each references a particular marketing tool to consider in your tourism marketing work.



4.7. CONCLUSION

From the success of Despacito to the use of music to bring travellers to a small Greek island to celebrate a music-based anniversary, music can be the differentiator in your tourism marketing campaign. From creating partnerships with leading music platforms to artist partnerships, we see these initiatives increasing, from Visit Portugal's association with the band Portugal The Man to Colombia's extensive music campaign, featuring genres

from all over the country. Using videos, music marketing and partnerships will increase visits and lengthen stays. The case studies outlined in the following section provide more examples of brands, organisations and tourism boards engaging with music to drive tourism numbers.



5. CASE STUDIES

VISIT **COLOMBIA** **LAND OF SABROSURA**

5.1. COLOMBIA LAND OF SABROSURA, COLOMBIA MUSIC AS THE CORE STRATEGY TO PROMOTE A DESTINATION

'Colombia Land of Sabrosura' is the name of Colombia's international tourism campaign launched in 2018. It focuses on music as an expression of the country's richness and diversity, originating from its African, European and American influences. The campaign included the production of 13 music videos with 21 Colombian artists from the different regions and cities. Since the launch of the campaign the videos have had more than 128 million views and has been featured in publications such as Billboard, and National Geographic. One of the songs has been nominated to a Grammy award. The campaign has used a mix of traditional and non-traditional media platforms such as Spotify, Deezer and Shazam.

Based on the idea of not just "telling" but "singing" the reasons to visit the country, the campaign has proven to be a powerful instrument for tourism promotion. Music creates emotional connections with people. Colombia is a country with more than 1,025 different rhythms grouped in 157 genres, two of its cities, Bogotá and Medellín, have been recognized by UNESCO as part of the Music Creative Cities Network, and 10 out of the 100 most watched videos in You Tube are by Colombian artists. In Colombia people don't

only "listen" to music they "live" music.

The use of the word "Sabrosura" as part of the campaign was an innovative bet as it is an expression without a specific translation into other languages. A kind of Colombian Hakuna Matata. The word is associated with the way in which the people of Colombia connect with each other and with travelers. Their joy, hospitality, kindness, spontaneity, and their spirit of celebration.

In an era that is moving towards meaningful, memorable and transformative travelling experiences, one in which people play an ever-increasing role, this campaign is destined to be a reference of the potential music has to enrich the tourism world.

You can watch all 13 videos at www.youtube.com/user/Colombiatravel/videos and learn more about the campaign at www.landofsabrosura.co





5.2. AMERICANA MUSIC TRIANGLE⁷⁶, USA

MUSIC TRAILS INCREASE VISITOR NUMBERS

The Americana Music Triangle consists of 5 guided driving trails, where tourists and visitors can follow the “gold record road”, revisiting historical sites where the history and heritage of American music is relevant. Linking a triangle whose ends are Nashville, Tennessee, Memphis, Tennessee and New Orleans, Louisiana, the Americana Music Triangle has welcomed over 40m visitors since it was launched and has led to regeneration and economic development in towns and villages throughout the trail, because visitors spend more time exploring the history, from Elvis to Muddy Waters, Muscle Shoals to Mardi Gras. Created by philanthropist and land conservationist Aubrey Preston in 2014, the Americana Music Triangle is one of the United States’ most popular music-themed trails, with plans to expand with more trails, heritage sites and development across the region.

A number of travel agents are already capitalising off of the famous history of (mostly southern) American music by offering extensive tour packages. These operators include Thomas Cook, Trailfinders, Cosmos, Wexas, Virgin Holidays, Americana Music Tours, Peak Performance Tours, Titan Travel, Just You, Tour America, Newmarket holidays and Globus. From ‘Music Cities’ tours across the south of the United States to focusing on specific cities or attractions, from Dollywood in Tennessee to New Orleans, these primarily all-inclusive packages are renewed and reissued each year across the sector, creating revenues not just for the tour operators, but for the entire ecosystem across travel, lodging, hospitality and logistics, all of which to service to travellers throughout their experience. On average, these tours take between 7-10 days and cost upwards of \$2000 USD per person.⁷⁷

OBONJAN

5.3. OBONJAN FESTIVAL AND ISLAND, CROATIA MUSIC INCREASES WELLNESS TOURISM

An island in Croatia has been transformed into a two-month music festival and wellness retreat, called Obonjan Island. Developed by music festival promoters from Croatian events Hideout and Unknown Festival, the summer-long retreat has a capacity of 445 guests, all of whom purchase access to stay on the island including music, yoga, meditation and spa treatments. Located on a previously

uninhabited island 45 minutes from Split, by ferry, Obonjan Festival has blended music with wellness, to create a unique experience for guests that mixes a number of offers for an adult-exclusive audience. So far, artists including Gilles Peterson, Kate Tempest and club nights like Limp Disco and Triple Cooked have performed residencies.



5.4. GRAMMY MUSEUM, CLEVELAND, MISSISSIPPI, USA MUSIC IMPROVES LOCAL ECONOMIES

The Recording Academy in the United States opened a new museum dedicated to the history, heritage and celebration of music in the small town of Cleveland, Mississippi. The museum opened on the site of Delta State University and featured an exhibit featuring The Beatles. It exceeded admission expectations in its first

year,⁷⁸ and has led to a number of new hotel properties being built in Cleveland.⁷⁹ It is now a prime feature in the region's overall tourism initiative, being mentioned over a dozen times in Mississippi's general travel guide.⁸⁰



5.5. BAYREUTH FESTIVAL AND EXPERIENCE, GERMANY

MUSIC IS A UNIQUE STORYTELLER

For 5 weeks in Bayreuth, Germany, Wagner is celebrated across a number of venues, churches and city squares. The festival has become a global pilgrimage for fans of the German composer, as it was conceived and originally hosted in 1876.⁸¹ The festival originally took place 6 years before Wagner died and has hosted the world's most celebrated performances and interpretations

of his work, for over 150 years. It is the largest festival in the city and has become the premier destination to understand, experience and revisit Wagner's extensive catalogue.



5.6. ESTÉREO PICNIC, BOGOTÁ, COLOMBIA

TOURISM AS A MUSIC EXPORT TOOL

Estéreo Picnic began in Bogotá in 2010 as a way to showcase Colombia's best artists. From a crowd of less than 3,000 seeing 9 artists at its inaugural edition to the over 80,000 the festival attracts now,⁸² it has evolved into a major alternative festival, featuring headlining acts from global artists alongside continued programming of South America's favourite artists. Whether intentional or not, the programming is the perfect strategy for putting local artists in front of an international-oriented audience. The headliners, with big names such as The Killers and The Weekend, draw crowds which are then treated to a programming dispersed with Latin American artists. In this way, people hear artists which they may never have otherwise gone out of their way to see. In its 8 years, the festival has retained a solid ratio supporting its original

mission: over 50% of the line-up for the last edition consisted of Latin American artists.⁸³ Estéreo doesn't confine itself to any one genre either, always looking to add new sounds to the mix so long as they are representative of the local scene, and many of the featured Latin American artists use modern alternative and traditional sounds. This sets Estéreo apart from other South American festivals, such as Lollapalooza, which stick to traditional line-ups reflected across major festivals around the world, and puts Colombia on the map as an incubator of great music, not only in terms of curating but also in terms of creating.



5.7. TAMWORTH COUNTRY MUSIC FESTIVAL, AUSTRALIA

MUSIC AND TOURISM WORKING TOGETHER TO BUILD SOMETHING BIGGER

Tamworth Country Music Festival, now in its 46th year, is the second-largest country music festival in the world (after Nashville's annual bash) and the largest music festival in Australia. Held over two weeks, it attracts approximately 50,000 fans per day and features 700 artists, 2,800 events and 120 venues.⁸⁴ Peel Street, the local main street, becomes pedestrianized, and 600 buskers audition to perform during the celebrations. There is also an awards ceremony, the Golden Guitar Country Music Awards of Australia, which are highly coveted among the nation's country scene. The festival, which has a budget of AUD \$1.9 million, puts over AUD \$50million into Tamworth's economy,⁸⁵ over 20% of the city's AUD \$222 million annual

tourism industry.⁸⁶ It is unique in that it is not a singularly ticketed event, but rather a combination of efforts from local venues and business as well as a team of volunteers that help streamline the programming. Organizers track attendance rates by coordinating with local transport departments, tracking phone signals, counting hotel and campsite occupancy rates, and tracking visits to the local tourist information centre, all of which have seen figures rise in the last few years (or, in the case of accommodation, availability sell out at earlier dates).⁸⁷ Today, the town of Tamworth has a 90% rate of recognition as the Country Music Capital of Australia,⁸⁸ largely due to the festival.

lastminute.com

5.8. LASTMINUTE.COM - MUSIC MAKES YOU TRAVEL, UK PLATFORMS BRING OPPORTUNITIES

In 2017, LastMinute.com launched Music Makes You Travel. It is an online portal consisting of curating videos where artists offer short podcast-style recommendations to their cities. It is combined with a specific playlist referencing each city, which the brand calls "your soundtrack to the world's most exciting places."⁸⁹

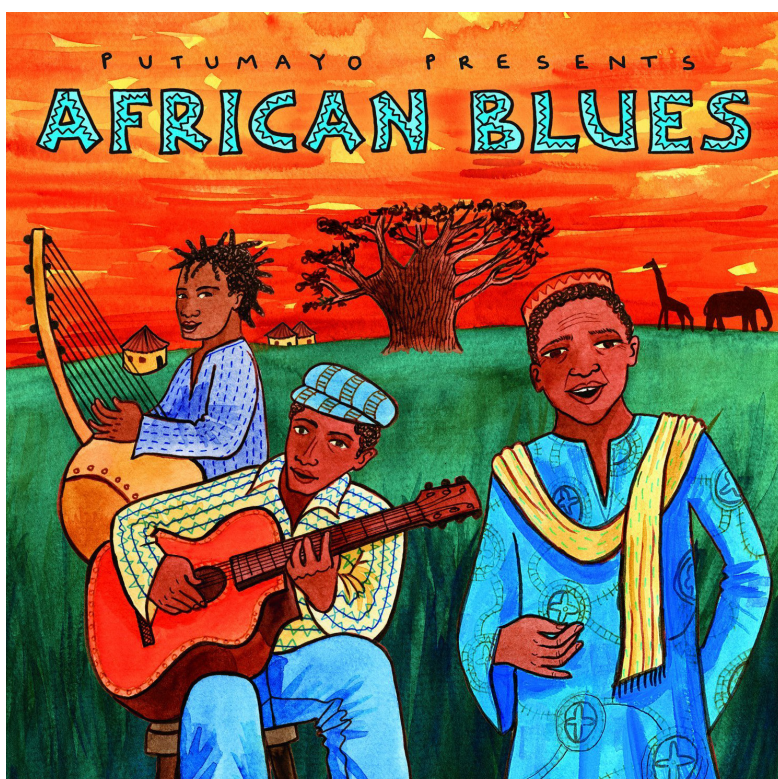
The result was 10 interactive maps to specific neighbourhoods, and links to packages (flight, hotel, car) to experience them. Six international artists were chosen to lead the campaign and research was conducted into the importance of music to their customer base, which found that 47% of British respondents would travel abroad for a music festival⁹⁰, 33% more Europeans were travelling to Croatia at the time of Ultra Festival in 2016 and similar

figures were attributed to Ypsigrock Festival in Sicily, Italy in 2015⁹¹

Since, the campaign has partnered with Spotify and is building bespoke, integrated platforms for other tourist boards, including Visit Holland.

"As festivals become a staple ingredient for the perfect summer break, festival-goers are looking to brands for inspiration for everything they need to make their trip special and successful – from tents to travel insurance. Brands that fail to factor this unique audience into their online campaigns risk missing out on a big category of summer spend."⁹² Alessandra Di Lorenzo, Chief Commercial Officer, Media and Partnerships, lastminute.com group

PUTUMAYO World Music



5.9. PUTUMAYO WORLD MUSIC, CUBA MARKET HERITAGE AND LIVING CULTURE TOGETHER

Putumayo World Music is a record label specialising in world music compilations. In 2017/18, Putumayo launched a travel division in collaboration with InSightCuba and Masala Expeditions and long-time Putumayo AandR consultant and musicologist, Jacob Edgar. In November, 2017, Putumayo led its first music-based trip to Cuba and is launching new offerings to Peru, New Orleans along with follow-up journeys to Cuba.⁹³ These experiences are influenced by the music

Putumayo released over many years and the expertise of the curator, in this case, Edgar.

InSightCuba offers two jazz tours within its roster of nine experiences, as well as the Putumayo Cuba! Cuba! Tour. The tours include visits to UNESCO world heritage sites, private live performances and unique tours of music sites, including music venues and recording studios.⁹⁴



5.10. AIRBNB EXPERIENCES - LIVE MUSIC, USA

INTIMATE EXPERIENCES LINK LOCALS WITH TRAVELLERS

In early 2018, Airbnb launched its Airbnb Concerts series, hosting intimate music events with audiences of 50-100 people in unique locations from speakeasies to living rooms and small chapels. This expansion of the 'experiences' which Airbnb introduced in 2016, allowing customers to book activities in their destination cities as well as accommodation. Music became a naturally popular category of experience, prompting the company to focus efforts on a dedicated branch for music events. At its launch, Airbnb Concerts were offered in 25 cities across North America, Europe, Asia and Australia. By the end of 2018, Airbnb expects to expand this to up to 100 cities and 20,000 fans attending shows per month.⁹⁵ Tickets typically run from \$20-\$35, and artists can earn up to \$1,000 per show. The concerts provide a unique opportunity for artists,

because the audience can be comprised of typical Airbnb travellers, which means the room can have a representation of several countries and provide a fantastic marketing platform for local indie artists. This is the reverse of the traditional concert setting, where a touring artist plays for an audience of local people. The intimacy of the format creates a desirable experience for audience members not otherwise found at large-scale arena or festival shows. This is reflected in figures, with Airbnb Experiences growing at a rate 10 times faster than Airbnb Homes.⁹⁶ The programme also lends itself to social activism, something growing in importance to fans and travellers, by offering itself as a platform to global artists such as John Legend and Vance Joy, who donate proceeds to their chosen charities.



5.11. SOFAR SOUNDS, UK

MUSIC CAN CREATE AMAZING, UNIQUE, ONE-OFF EXPERIENCES

Sofar Sounds is a series of intimate, secret concerts held across 413 cities around the world. Launched in 2009 after frustrations with the bustling, distracted environments of most bar or arena gigs, the premise is to promote active listening environments in small settings. A typical show features three acts, the details of which are not announced until the show starts. Prospective attendees apply for a ticket lottery up to five days before the event and, if successful, are texted the location of the venue the day before. Venues are constantly changing, and although living rooms are still preferred by organizers, anything unique and surprising can make the cut. While the

secrecy surrounding gigs is as tight as it was when the company was launched, the reputation has grown to become a household name involving music lovers everywhere, from artists to local videographers and promoters who get involved in pulling off a show. Just five years after launching, demand for tickets resulted in a ratio of 15 ticket applications for every single invite.⁹⁷ The company has grown organically, with people introducing their visiting friends, who take the idea to start a chapter in their home cities, and concerts being described as networking events as much as a good night out.⁹⁸

CITY SOUNDS 360°

5.12. CITY SOUNDS 360, SPAIN

MUSIC TOURISM PLATFORMS ARE BOTH ONLINE AND OFFLINE

City Sounds 360 is a collaboration between Fender Guitars and Room Mate Hotels which brings concerts to hotel guests through virtual reality. Artists across Madrid, Barcelona, Málaga and Granada video recorded performances in hotel rooms in their local cities. The footage was then utilized in virtual

reality headsets, which guests can put on as they sit in their room, giving them an intimate performance. The series is also used to market a line of Fender guitars, which each of the artists plays. The videos are also available via YouTube for anyone not staying at the hotels.



5.13. SOUNDS LIKE LONDON, UK

A CITY CAN BE A FESTIVAL EXPERIENCE

Sounds Like London is a month-long celebration of London's grassroots music venues and scene, spurred after the revelation that a third of the city's grassroots venues have shut down in the last decade. The event featured from some of the finest emerging talent performing in small or unique places, and events were sure to cater to all demographics, from a techno festival in west London to a parents and baby night in Central. There was also a special focus on women in music, to mark

the centenary of women's right to vote in the UK. This consisted of an all-female BBC Music Introducing stage, a female grime showcase, and several women-only networking events and workshops. Many global brands got involved in the celebration, with Airbnb offering coinciding concerts and Apple hosting album cover workshops. Meanwhile, Soho also recognized its own heritage by hosting Soho Music Month, which offered free concerts, street fairs and walking tours.



5.14. THE MIGHTY MISSISSIPPI FESTIVAL AND BRIDGING THE BLUES, USA

FESTIVALS' PARTNERSHIPS OPEN UP LARGER DESTINATIONS TO EXPLORE

The Mighty Mississippi Music Festival is a 3-day celebration of the land that historically inspired blues music, and the various genres which the blues inspired in turn. It is part of the Bridging the Blues initiative, a multi-week, tristate event led by the Arkansas Department of Parks and Tourism, Mississippi Delta Tourism Association, Delta Regional Authority, Memphis Tourism and Mississippi Tourism. Bridging the Blues promotes musical events and blues-themed attractions throughout the region. The Mighty Mississippi Festival, the

jewel in its crown of celebrations, promotes local artists as well as local food while providing plenty of activities for all ages and coordinating a singer-songwriter competition (the winner gets to play at the festival). The festival has attracted people from all over the world as an ideal spot to see blues where it began and has received accolades from publications such as Acoustic Guitar magazine noting it as the best festival and must-see event of the region.⁹⁹



5.15. MUSIC AND GASTRONOMY ARE LIKELY BEDFELLOWS, USA

MUSIC AND GASTRONOMY ARE LIKELY BEDFELLOWS

California's Napa Valley is known as being one of the finest wine regions in the world, attracting millions of visitors annually (1 in 5 of whom are international tourists) and generating \$1.9 billion in visitor spending alone in 2016¹⁰⁰ and supporting over 13,400 jobs. As a part of this, there are several music events and festivals held each summer to complement the region's iconic offer. Festival Napa Valley combines performing

arts with culinary and wine tastings across ten days, while Bottle Rock Napa Valley offers a more mainstream, Top 40-inspired line-up alongside food and wine markets. Another unique event is Napa Porchfest, which sees artists across the area utilize the porches of their neighbours, friends or volunteers to perform a free concert for passers-by, which also encourages them to explore the area on foot in order not to miss anything.



5.16. MATALA BEACH FESTIVAL, CRETE

PUTTING YOUR DESTINATION BACK ON THE TOURISM MAP

Matala is a small fishing village in the Festos region of Crete. In 2011 the Mayor organized a party on Matala beach to celebrate the launch of a book titled 'The Myth of Matala'. The book documented the 1960s and 1970s period, a time when the world media threw a spotlight on the streams of young hippie travellers making their homes in the caves at Matala beach. The book launch party, featuring a weekend of live music performances on the sand beneath the famous caves, became talked about as a "hippie

reunion". It attracted significant interest on social media, with 35,000 people congregating in Matala for a music festival on the beach. The following year saw 58,000 people visit Matala for the second music festival. It continued to grow as an annual music event. Now in its 8th year it continues to deliver significant revenues to the local economy. It has also successfully put this small fishing village back on the tourism map, attracting visitors from all over the world for that festival weekend and throughout the season.

BUSK IN LONDON

5.17. BUSK IN LONDON, UK THE TOURISM VALUE OF STREET PERFORMERS

In 2016 the Mayor of London commissioned market research conducted by the University of Westminster to examine the role of street performance in the city. The findings revealed that 86% of tourists surveyed were in favour of street performance, also known as “busking”. The overwhelming view of tourists was that busking enhanced the visitor experience and make good use of public spaces. This prompted the Mayor of London to provide extra support for street performance with

the formation of an initiative called ‘Busk in London’. This scheme provides training and performance opportunities for new young talent and helps them to build their street performance skills. Busking is an exceptional way of bringing vibrancy to streets and public spaces in destinations all over the world. The value of street performance in place-making should not be underestimated. It is a huge asset when properly harnessed and supported to allow the talent to thrive.

6. LESSONS AND CONCLUSIONS

To conclude, here are our 'top music tourism tips' to take home:

1. Music is everywhere. You have it.
We promise.
2. Music encapsulates both heritage and living culture.
3. Music is our universal language.
4. Music impacts every marketing initiative - in print, online and in person.
5. Music increases heads in beds.
6. Music has a long value-chain, encompassing travel, hospitality, logistics, lodging and many other sectors.

Music is everywhere. Music is in all of us. Music tells stories as well as any other language. And if it was better strategized in policy and recognised as a primary reason why we travel, why we visit places and why we book holidays, both ecosystems - ones supporting the travel and tourism sector and the music sector - will benefit. More hotel rooms are filled. More flights are booked. More artists are paid. More restaurants are full and more people take home lifelong memories, wherever they are and whatever they do. No matter which tourism product you have or which step of the value-chain of tourism you are at, it is time for music to be recognised as its own category in creating, marketing and managing tourism products. And we hope as more products are developed, more partnerships will emerge that support musicians, local communities, travellers and everyone alike. Music makes places better. Let's use it more.



ABOUT THE AUTHORS



PROCOLOMBIA

EXPORTS TOURISM INVESTMENT COUNTRY BRAND

ProColombia is Colombia's public organisation responsible for promoting exports, investment tourism and the country brand. It has a network of 24 offices worldwide which cover 32 markets. It conducts research, provides information and training, matches opportunities between companies from the international markets and the country and develops international promotion campaigns. It is considered the most important public sector partner by the country's private sector.

www.procolombia.co
www.colombia.travel



Sound Diplomacy creates music and night time economy strategies that deliver measurable economic and social benefits through vibrant and sustainable music, music tourism and night time ecosystems. They advise cities, governments, brands and developers around the world, working in over 20 countries. They are based in London, Berlin and Barcelona, and the United States.

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