

CULTURAL AFFINITY AND SCREEN TOURISM

THE CASE OF INTERNET ENTERTAINMENT SERVICES

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Cultural Affinity and Screen Tourism – The Case of Internet Entertainment Services

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Foreword

by the World Tourism Organization

Year after year, destinations are receiving more and more travellers whose motivation is to visit locations where famous series or movies were filmed. There is no doubt that this trend, which was suddenly stopped by the outbreak of the COVID-19 crisis, will restart as soon as travel restrictions are lifted.

Beyond this, movies, TV series and Video-on-Demand services can strengthen relationships and cultural affinity between different countries and communities. They can also promote local languages and bring people closer to each other. When a person views a film or a series that showcases a specific destination, its landscapes, gastronomy and other traditional features, this increases not only their desire to travel to that country, but also provokes a greater curiosity to discover its culture, traditions and local customs.

Culture is an essential vector for tourism and audiovisual contents can serve as a mirror of the culture of a given community. This is the greatest value that Netflix and other streaming platforms can offer by producing and distributing contents all over the world: promoting the human side of tourism and bringing people with different cultures together.

We cannot forget the positive effects that screen tourism can have on achieving the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals. The reciprocal relationship between tourism and a stronger cultural affinity is one of the main drivers for boosting the local economies of destinations, as well as helping in the preservation of tangible and intangible heritage and promoting a greater respect for the environment.

All this has become even more crucial since the outbreak of this global pandemic. Lockdowns, social distancing and travel restrictions have raised our awareness on what is really important for us as human beings. We all want to travel again, meet new people and discover new cultures, and I am convinced that audiovisual contents will continue to be one of the main drivers allowing us to do so.

We are delighted to collaborate with Netflix on this global report, whose recommendations I trust will help destinations, policy makers and tourism stakeholders to really benefit from screen tourism and all the positive impacts it can have to promote local customs and traditions and preserve their cultural heritage.

Zurab Pololikashvili

Secretary-General, World Tourism Organization (UNWTO)

Foreword

by Netflix

At Netflix, we know that stories connect people and communities in profound and moving ways. The TV shows and films we watch bring out all sorts of different emotions, give us perspectives we've never seen before and even make us feel closer to each other. Finding the best stories and storytellers and bringing them to the world is truly at the heart of our business.

Over the last few years, as we have expanded our business globally, we have steadily increased our investment and production of local content, and it's been a privilege for us to work with inspiring storytellers everywhere. We have seen firsthand, the amazing ways that communities all over the world have connected with each other through content, from Japanese anime fans in Germany to the huge success of Turkish dramas in Latin America or the global phenomenon of shows like *La Casa de Papel*.

We are delighted to be collaborating with the UNWTO on this whitepaper which delves further into how high-quality content that is accessible and distributed widely, enables both cultural affinity as well as ignites the desire to travel. In fact, this paper highlights that people who watch local content are 2.4x more likely to say the featured country is their #1 travel destination. This truly demonstrates that the creative industries, cultural exchange, storytelling and tourism are all interlinked and can transform the way communities perceive and connect with each other.

In the research highlighted in this paper, we have been able to demonstrate conclusively what we instinctively already believed – i.e., that alongside the desire to travel and visit destinations, exposure to screen content also leads to greater interest in heritage, culture and developing interpersonal relationships. In this last year where we have faced great challenges across so many areas, from the pandemic to civil conflicts, this is more important than ever.

We are excited for the opportunities that this offers. Netflix is very much looking forward to using this research as a foundation for deeper partnerships with leading organizations such as the UNWTO, as well as local governments to leverage the ability of content to drive cultural affinity and tourism. We've been proud to start building such partnerships with the tourism agencies in the Republic of Korea and South Africa and hope that this paves the way for further engagement and collaboration.

Dean Garfield

Vice-President, Public Policy, Netflix

Executive summary

This publication explores how screen tourism, particularly through online distribution of films and TV series, can contribute to building bridges between communities across cultures while fostering tourism. Within this context, the concept of **cultural affinity** through film and TV content is introduced.

The report looks into the opportunities to maximize the social, economic and cultural benefits of screen tourism and offers recommendations to policymakers and the private sector for harnessing the role of Internet entertainment services (IES) and similar technologies to create and expand the value chain for their communities. The analysis is based on desk research covering international experts in tourism, culture and media, as well as a series of surveys specifically designed for the purposes of this publication.

Screen tourism: the role of films and TV series as drivers for cultural affinity and tourism

Films and TV series can play an important part in promoting destinations and tourism development. However, this effect can also be reimagined to have broader impact. The report looks into screen tourism and expands this concept to include its relationship with **cultural affinity**, or the **growing affection and attraction one has towards a particular country or culture displayed on the screen**.

The core of cultural affinity lies in the *creation* of a connection. When exposed to specific country/destination content, the relationship between the viewer and that destination shifts from being merely a place of commercial interest, to one which **the viewer feels a connection with**. In turn, this may facilitate important spillovers. Although travel may be one of such outcomes, the connection to the place itself can create links that facilitate continuous and long-lasting effects far beyond the visit to the destination. The coupling of screen tourism

and cultural affinity can advance socioeconomic development in line with the Sustainable Development Goals, namely by:

- **Widening the economic and cultural impact beyond tourism**, including the interest and demand for cultural and other goods overseas, which can contribute to SDG 8 (Decent work and economic growth).¹
- **Creating stronger connections and empathy** with the local communities and its people and traditions, which builds a positive relationship between the person and said country or culture, whether or not travel ever occurs. This can lay the foundation for more peaceful societies, which can contribute to SDG 16 (Peace and justice) and SDG 17 (Partnerships for the Goals).²

In examining the requirements that can successfully leverage cultural affinity through film and TV series, three drivers were identified: **diversity of content, ease of access to content, and high-quality content**.

In the digital age, new technologies expand content diversity and distribution by aggregating viewers across geographical boundaries. These services also drive content discoverability and viewer engagement through personalization and technology features. The model provides audiences with **ease of access** to a **diverse breadth** of curated and high-quality content. By showcasing content in this way, digital players offer an avenue to spread local content to a larger audience.

The report further explores the tangible impact of films and TV series through Internet entertainment services (IES) to build cultural affinity and connections across communities and countries. With a specific focus on Netflix content, a series of surveys show that the spillovers carry through many important sectors, including three key findings:

- Audiences who watch content from other countries or cultures are **more likely to travel** to the featured destinations.
- Beyond travel, there is a **higher-stated interest in supporting a broader value chain**, namely greater fascination and attraction towards cultural goods, such as a countries' famous landmarks, gastronomy, local history, cultural products, language and people.
- Netflix **facilitates the discoverability** of such content.

In today's unprecedented times caused by the COVID-19 pandemic, the **need for global collaboration is higher than ever**. When thinking about the role of film and media, considering cultural affinity can widen the approach of governments in the promotion of screen tourism and local destinations, which in turn results in expanded economic benefits and long-lasting sociocultural empathy.

1 World Tourism Organization (n.d./c), Tourism in 2030 Agenda, UNWTO (online), available at: www.unwto.org/tourism-in-2030-agenda (06-10-2020).

2 World Tourism Organization (n.d./c).



Chapter 1: Cultural affinity and tourism through films and TV series

Abstract: This chapter expands on the role and impact of screen tourism to include **cultural affinity** or the **growing affection and attraction one has towards a particular culture or country displayed on the screen**. Beyond prompting the desire to travel, films and TV series have the potential to connect with audiences through values and cultural features. This connection if adequately managed can drive enduring positive perceptions of a country or culture, bringing to light unexplored benefits. Such spillovers can contribute to a sustainable tourism sector, higher demand for cultural goods and stronger local or national branding **to support the restart and further development of the tourism sector**. For countries and destinations to capitalize on these benefits, three key features of content can cultivate this impact: **diverse, ease of access, and quality** content.

Key words: Cultural affinity, screen tourism, values-based connections, cultural tourism, sustainable tourism, Sustainable Development Goals

Key message: Cultural affinity through films and TV series expands the value proposition beyond screen tourism to facilitate positive spillovers that governments and other stakeholders may capitalize on, including contributing to sustainable tourism through long-lasting cultural connections.

1.1 Screen tourism: a thriving phenomenon

Blockbuster hits can have a profound impact on travel to a filming destination. This phenomenon, known as **screen tourism**, grew in the 1990s as a way to promote destinations featured on television, video or the cinema screen, which subsequently drove tourist visits.³ Today, screen tourism is an established phenomenon and a strong leverage **for destinations to showcase themselves and attract** both domestic and international tourism. *The Lord of the Rings* trilogy, for example, spurred a 40% increase in annual visits to New Zealand from 2000 to 2006.⁴ By 2012, tourism was recognized as the country's second highest sector, with most of its international visitors travelling to film sites.⁵ The United Kingdom also experienced a screen tourism boom following the release of the *Harry Potter* films. From 2011 to 2013, the movie series prompted a 230% visitor increase to the films' sites, facilitating an extra GBP 9 million (EUR 9.96 million) into Northumberland's economy.⁶

While the sector recovers from the impact of the COVID-19 pandemic, the **perspectives around screen tourism remain optimistic**. Over the last few decades, the number of visitors travelling to such destinations has risen significantly. Analysis on travel patterns shows that the number of travellers based on films and TV shows has doubled in the past five years, reaching nearly 80 million in 2019.⁷ This effect is seen in Dubrovnik, Croatia, a destination popularized by the fictional city of King's Landing in HBO's *Game of Thrones*. In a four-year period before the series aired, tourism increased by 7%. Following a four-year period after *Game of Thrones'*

release, Dubrovnik tourism jumped by nearly 38%, with continued increase in projected visitations despite the conclusion of the series.⁸

However, to protect the sustainability of screen tourism, **integrated tourism policies and support mechanisms** must be in place to ensure economic prosperity and adequate visitors management. The World Tourism Organization (UNWTO) highlights that "poorly sited tourism development and inappropriate activities can be very damaging to biodiversity in sensitive areas."⁹

Referencing the Maya Bay phenomenon, a destination in Thailand popularized by the film *The Beach*; high level of demand and congestion jeopardized the area's rich ecosystem and local heritage. The negative effects of such growth are also quoted in relation to Dubrovnik, Croatia.¹⁰

Challenges such as overcrowding, traffic congestion, physical damages, displacement of locals and low-quality tourism experiences are challenges that stress the critical role of adequate tourism planning, measuring and management in tourism destinations. Thus, this report highlights the importance of integrating UNWTO sustainable tourism principles, guidelines and tools in screen tourism initiatives for a long-lasting and viable sector.

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- 3 Niziol, A. (n.d.), 'Film tourism as a new way to market a destination', Scientific Review of Physical Culture, volume 5 (4), (online), Available at: <http://62.93.45.40/srpc/Articles/Volume-5/Issue-4/23.aspx> (12-09-2020).
 - Beeton, S. (2010), 'The Advance of Film Tourism', Tourism and Hospitality Planning & Development, volume 7 (1), pp. 1-2, DOI: 10.1080/14790530903522572.
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 - 5 Bell, A. (2016), '15 Movies and TV Shows That Created A Tourism Boom', Screen Rant (online), available at: <https://screenrant.com/movies-tv-shows-create-tourism-booms/> (12-09-2020).
 - 6 Olsberg SPI (2019b), Quantifying Film and Television Tourism in England, Report for Creative England in association with VisitEngland, Olsberg SPI, England, p.2, available at: <https://applications.creativeengland.co.uk/assets/public/resource/140.pdf> (21-09-2020).
 - 7 Travel Competitive Intelligence Research (2018), 80 million travellers chose their destinations mostly based on films and TV series, (online), available at: <http://xl4z.mj.am/nl2/xl4z/lgs45.html?hl=fr> (15-09-2020).
 - 8 Tkalec, M.; Zilic, I. and Recher, V. (2017), 'The effect of film industry on tourism: Game of Thrones and Dubrovnik: Effect of film industry on tourism', International Journal of Tourism Research, volume 19, p.705–714, DOI: 10.1002/jtr.2142.
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 - 9 World Tourism Organization (2013), Sustainable Tourism for Development Guidebook – Enhancing capacities for Sustainable Tourism for development in developing countries, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284415496>.
 - 10 Abbasian, S.; Onn, G. and Arnautovic, D. (2020), Overtourism in Dubrovnik in the eyes of local tourism employees: A qualitative study, Cogent Social Science (online), DOI: 10.1080/23311886.2020.1775944.

1.2 Defining and expanding the value chain through cultural affinity

Although there has been significant research on the impact of screen tourism and its value to the tourism sector, little has been examined around **screen-induced cultural affinity**. When one watches a particular film or show, the **cultural affinity**, or the **growing affection and attraction towards a particular culture or country displayed on the screen**, may have greater reverberations beyond only prompting travel or the desire to travel itself.

The report focusses on how coupling the effect of **cultural affinity together with screen tourism offers a holistic picture** around the impact of films and TV series on local economies and culture. In doing so, this publication considers specifically the opportunities emerging from the distribution of films and TV series through the Internet, which includes services such as Netflix, Amazon Prime Video, HBO Max, Disney Plus and others. These services have become ever more relevant in recent years, thus, supporting the need to explore their role in culture and tourism through research and data.

Screen tourism and cultural affinity together have the potential to drive enduring and long-lasting positive perceptions of a country or culture, while bringing three spillovers to light, which include:

- **Contributing to a sustainable approach to tourism** in destinations depicted in films and TV series by ensuring the promotion of positive effects on local economic growth, local culture and the environment supporting the achievement of the SDGs.¹¹ According to UNWTO, audiovisual products can serve as a mirror of the culture and values of any given community.¹² Content which promotes cultural affinity can facilitate a value-based connection between the viewer and depicted destination, engendering a vested interest beyond

just the location. This can contribute to sustainable tourism such as reducing seasonality, promoting new destinations and/or increasing the diversification of destinations' subjects, further promoting a sustainable approach to tourism as set forth by UNWTO.¹³

- **Widening the economic and cultural impact beyond tourism**, including the demand for cultural and other goods overseas, the desire to try specific cuisines and other aspects of life, as well as influence on lifestyle, music and literature interest. By expanding the value beyond travel, this spillover can promote local culture and products to boost the economic, social and environmental outcomes that contribute to SDG 8 (Decent work and economic growth).¹⁴
- **Facilitating stronger connections and empathy** for the local communities, people and traditions, creating a positive relationship between the viewer and said country or culture, whether or not travel ever occurs. At its core, this approach can contribute to spreading tolerance and understanding between people of diverse cultural backgrounds, which "[lays] the foundation for more peaceful societies" and raises awareness across all stakeholders, following SDG 16 and SDG 17.¹⁵ SDG 16 (Peace and justice) aims to foster multicultural solidarity and inter-faith understanding; SDG 17 (Partnerships for the Goals) encourages strengthening private-public partnerships and engagement of multiple stakeholders.

Tourism that is motivated by learning, discovering, experiencing and consuming tangible and intangible cultural attractions/products in a destination not only underlines the economic value of tourism spending, but it also contributes to a long-lasting and sustainable sector.¹⁶

11 World Tourism Organization (n.d./c).

12 World Tourism Organization (2020e), Tourism and Cinema for the Achievement of the Sustainable Development Goals, UNWTO (online), available at: <https://www.unwto.org/tourism-and-cinema-for-the-achievement-of-the-sustainable-development-goals> (04-05-2021).

13 World Tourism Organization (n.d./c).
World Tourism Organization (2018), Tourism and Culture Synergies, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284418978>.
World Tourism Organization (2020e).

14 World Tourism Organization (n.d./c).

15 World Tourism Organization (n.d./c).

16 World Tourism Organization (2019b), UNWTO Tourism Definitions, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

UNWTO defines tangible and intangible attractions/products as “a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions”.¹⁷ In fact, cultural tourism is a major pillar of tourism, growing at 23% over in the last five years, exceeding the 19% overall growth in global tourism for the same period.¹⁸

The reciprocal relationship between tourism and culture may have “an edge in helping places preserve a sense of cultural creation, rather than remaining merely as corners of cultural consumption”.¹⁹ In fact, cultural tourism is not only an economic driver, but it can also contribute towards empowering communities as these encounters prompt valuable interactions that help build dialogue between the tourist and the destination, fuelling greater fascination and understanding between societies.²⁰ Additionally, facilitating the culturally motivated tourist may incentivize preserving these attractions and products, as the revenue it generates can be directed back into initiatives to support its long-term survival. “Fostering the responsible use of this living heritage for tourism purposes can generate employment, alleviate poverty, curb rural flight migration, and nurture a sense of pride among communities” for a sustainable future.²¹

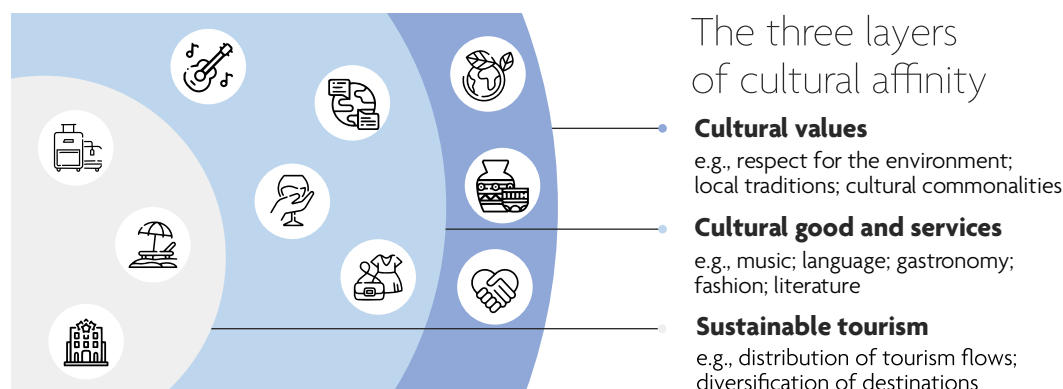
The cultural motivated tourism trend is predicted to develop further over the next **five years**.²² The interest and demand for intangible culture (such as a country's local history, lifestyle, gastronomy, music, sports, religion and others) are encouraging tourists to travel and bring tourism benefits into the economy.²³ “Tourists no longer conform themselves in attending traditional sightseeing tours, they need to feel involved into the destination's daily life. They do [not] want to be considered as ‘tourists’”.²⁴

Cultural affinity through films and TV series, when coupled with screen tourism, may present the opportunity to widen the cultural connections between the audience and a destination, further expanding cultural motivated tourism. The coupling may offer a suitable and long-term approach to support global tourism and broader development goals.

For governments to harness this opportunity, UNWTO advocates for “developing integrated approaches to tourism and culture synergies and increasing community empowerment and inclusion”.²⁵

The following section provides an in-depth analysis of cultural affinity and its role in screen content.

Figure 1.1



Source:
Disal Consulting

17 World Tourism Organization (2019b).

18 World Tourism Organization (2018).

19 Kabanda, P. (2018), *The Creative Wealth of Nations: Can the Arts Advance Development?*, Cambridge University Press, Kindle Edition, p. 143.

20 World Tourism Organization (n.d./b), *Tourism and Culture*, UNWTO (online), available at: <https://www.unwto.org/tourism-and-culture>.

21 World Tourism Organization (n.d./b).
World Tourism Organization (2019b).

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23 World Tourism Organization (2018).

24 Creative Tourism Network (n.d.), Press Release, available at: <http://www.creativetourismnetwork.org/wp-content/uploads/2014/05/Pres.creative-tourism-ENG-.pdf>.

25 World Tourism Organization (2018).
World Tourism Organization (2020a), *ALUa Framework for Inclusive Community Development through Tourism*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422159>.

1.2.1 The idea's origins and core principles

In its purest form, *cultural affinity* means **a growing level of liking or closeness towards something or someone based on cultural familiarity or commonality**. The idea of cultural affinity was arguably first studied in 1984 as a marketing experiment, when researchers were analysing market entry barriers while conducting international business. The research found that, in order to achieve successful business interactions between one country and another, one must get as close as possible to the new market. The approach required reducing the *psychic distance* (a term to explain the combination of perception and value systems) between cultures by increasing commonalities. This led logically to what can be supposed instinctively: that people are generally more comfortable and accepting of something when they find it familiar and/or relatable.²⁶

In 1998, further research revealed that having a high level of *affinity* or *closeness* does not guarantee or translate into high levels of *liking*. However, empirical evidence shows that both ***affinity and liking are strongly associated with engendering positive feelings***. This further describes that when persons feel close with a particular culture, they are more likely to have positive feelings towards it.²⁷

Across research fields, the idea of cultural affinity is often intertwined with the principle of trust and experience. *Trust* refers to the fundamental asset in which relationships between cultures are built through interactions. *Experience* points to the learning process accrued through those interactions required to build trust in the first place. While trust and experience are almost exclusively earned through interactions, **cultural affinity can be sparked even before the interaction begins**. As a matter of fact, it may be the initial driver for it.²⁸

1.2.2 Cultural affinity in practice

Over the last few decades, cultural affinity was recognized as a key principle in marketing, such as brand affinity, brand connectedness, marketing affinity, and others. These concepts seek to understand why certain consumers are drawn towards a particular brand and not to others, by looking into cultural commonality drivers. Brand affinity, for example, is a metric used by industry experts to measure the level of positive emotional connection and closeness a consumer has to a brand. If customers feel that a brand shares their same cultural values, brand affinity will be strong, leading to higher trust, loyalty and satisfaction of the product or service.²⁹ The result is a valuable and enduring relationship between a brand and its customers based on familiar and shared ideals.

Outside of the marketing field, cultural affinity also developed in the public policy sector. In this capacity, cultural affinity analysis acts as a roadmap for public relations experts in understanding how other cultures and countries perceive their messages. A deeper understanding of cultural affinity, in fact, facilitates better and more effective communication to ensure messages are understood and accepted the way they were intended.³⁰ According to UNESCO, the term *soft power*, a facet of cultural affinity, represents “the power to bring people together; to persuade, rather than coerce; to set common goals and provide conditions that are ripe for collective action”.³¹ The term was originally coined by Joseph Nye to describe how American art and culture, such as jazz music, also communicate values like freedom and democracy around the world.

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- 26 Smith, M.; Dowling, P.J. and Rose, E. (2011), 'Psychic distance revisited: A proposed conceptual framework and research agenda', *Journal of Management & Organization*, volume 17, pp.128–130, DOI: 10.1017/S1833367200001747.
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- 28 Smith, M.; Dowling, P.J. and Rose, E. (2011).
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- 31 Division for Gender Equality UNESCO (2017), *UNESCO's Soft Power Today: Fostering Women's Empowerment and Leadership*, Keynote speeches, UNESCO, Paris, p. 4, available at: www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/BSP/GENDER/PDF/30_June_Publication_final_02.pdf. Nye, J. S. Jr. (1990), *Bound to Lead: The Changing Nature of American Power*, Basic Books, New York, Kindle Edition.

1.2.3 Cultural affinity through film and TV content

This publication seeks to delve into cultural affinity through entertainment content. Since culture can act as a bridge to interaction, cultural affinity generated through screen content may foster feelings of positivity in viewers around the world. The report explores this emotional connection as the potential of films and TV series to drive **growing feelings of attraction and affection that an audience develops towards a culture or country, which results in a ripple effect to build a long-lasting relationship with said culture or country.**

The core of cultural affinity lies in a connection of values. This relationship changes a destination from being merely a place of commercial interest, to one which the viewer feels a strong value connection with, and therefore, invested in. A vested interest based on positive perceptions may drive positive spillovers. Although travel may be one outcome, this connection itself creates links that bring continuous and long-lasting ripple effects far beyond the visit.

Considering cultural affinity through entertainment content may help develop a distinct approach to enhance the brand perception of a featured country or culture. **The competitiveness of the tourism sector is closely related to the promotion of a country's brand,** as well as its typical tangible and intangible products. National brands encompass the whole identity of a destination, depicting its key features and values. Developing a unique approach can raise awareness of a country's core characteristics and boost tourists' level of spending in several areas.³²

By recognizing the potential of screen-induced cultural affinity, governments can reap the benefits of a more holistic approach to screen tourism and strengthen soft power. The coupling of both cultural affinity and screen tourism widens the perspective for policymakers in understanding the value that films and TV series

may bring today. This highlights the importance for governments wishing to promote their culture overseas and attract more culturally minded tourists.

With this in mind, the next section of the chapter provides a framework for understanding the characteristics of content that ultimately drive cultural affinity.

1.3 Three key features that drive cultural affinity through content

Having discussed the value and potential of leveraging films and TV series to drive both screen-induced tourism, as well as cultural affinity, three points can help put this into practice. Research shows that working together with entertainment services, governments and other public-private stakeholders can formulate policies that enable **diverse, ease of access** and **quality** content in order to capture the benefits.³³

1.3.1 Diversity

Diversity of content, or content from different genres, is key to capturing a range of audiences as wide as possible. Content consumption behaviour today shows that each viewer has a unique set of preferences. A higher level of content diversity is key in ensuring that more viewers, no matter how niche, are likely to find content that they can connect with.³⁴ In fact, content which appeals to niche audiences can have a larger impact on cultural affinity than mainstream titles.³⁵

Diversity in this context also means that more viewers are able to build links across cultures and 'see themselves' in other cultures, societies and lifestyles. The likelihood of new audiences who have never seen that content but connect with the storyline through familiar values becomes a much greater number. There are common threads from films and TV shows that

32 World Tourism Organization (2013).
See also: World Tourism Organization and European Travel Commission (2009).

33 Basis Research (2020a–d), Evaluating the Impact of Spanish, South African, Japanese and Canadian Content on Cultural Affinity & Tourism.

34 PricewaterhouseCoopers (2019), Video Streaming Shakeup: Survey of Consumer Attitudes and Preferences, available at: www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/consumer-video-streaming-behavior.html (20-12-2020).

35 Basis Research (2020a–d).

are disrupting the landscape of the once Hollywood-dominated plain.³⁶ For example, the success of content from India in Latin America is attributed to the appeal of the 'different' and more culturally relatable storyline, compared to the traditional Hollywood narrative.³⁷

1.3.2 Access to content and frequency of watching

Audiences across the world should be able to access and consume such content easily and frequently.

Accessible content in this context refers to films and TV series that are consumable in terms of:

- Devices: enabling ease of access through multiple digital devices, across borders and on-demand content available for viewing at any time;
- Language: providing subbing and dubbing features that are easily available to bridge linguistic barriers; and
- Accessibility services, such as audio descriptions and closed captioning, to enable ease of access for viewers with disabilities.

Wider distribution channels not only help content to travel but are key in building a global audience base.³⁸ Supposing audiences can watch their preferred content from any corner of the globe, at any time and on multiple devices, the likelihood of viewership increases. Audiences should then be able to access new content frequently to build a sustained connection. Initial research also suggests that a frequency of viewing at least once a month would have the potential to generate substantial affinity towards such content.³⁹

An accessible approach also means **removing viewership barriers to connect with more people**. Films and TV series that overcome language and disability barriers are

able to reach entirely new markets that have traditionally been overlooked or out of reach. Well-dubbed content can cross language barriers, so much that audiences who identify with the movie or TV show believe that the foreign content is their own.⁴⁰ Accessible content also removes barriers for multiple disabilities, including people who are blind, visually impaired or hearing impaired. This means integrating video descriptions and closed captioning, which includes subtitles and transcripts, to promote equal participation from all audience members.

1.3.3 Quality vs. quantity

As films and TV series have tremendous impact in shaping other people's perceptions of a country and culture, the quality of content triumphs over quantity.

As the measurement of quality of content may depend on the viewer's subjectivity, general parameters such as industry recognition through awards, financial investments, artistic merit, quality of acting and technical achievement, consumption/download figures and accessibility for impaired viewers may contribute to the hallmark of a high-quality film or TV series, but they are not limited to them. For example, a low investment documentary, a TV series showcasing unrecognizable talent, or a film that does not fit into a particular mainstream genre may still be considered as high-quality content.

The danger of focussing on quantity is that one might end up with low-quality productions that achieve the unwanted opposite effect. In an overly saturated marketplace, poor quality films and TV series risk being pushed to the side by an uninterested audience. Across multiple studies and observations on the impact of film, quality in content is a popular choice amongst viewers and is shown to be the primary motivator to watch a particular film or show. The impact of high-quality content often influences beyond the film or

36 Bhutto, F. (2019), *New Kings of the world: dispatches from Bollywood, Dizi, and K-Pop*, Columbia Global Reports, Kindle Edition, p. 161.

37 Bhutto, F. (2019).

38 Olsberg SPI (2020), *Global Screen Production – The Impact of Film and Television Production on Economic Recovery from COVID-19*, Study by Olsberg SPI, p. 43, available at: www.o-spi.co.uk/wp-content/uploads/2020/06/Global-Screen-Production-and-COVID-19-Economic-Recovery-Final-2020-06-25.pdf (19-12-2020).

39 Basis Research (2020c), *Evaluating the Impact of South African Content on Cultural Affinity & Tourism*. Respondents were asked to answer survey questions assuming all travel restrictions had been lifted. Researched markets include France, Germany, United States of America, Canada and United Kingdom.

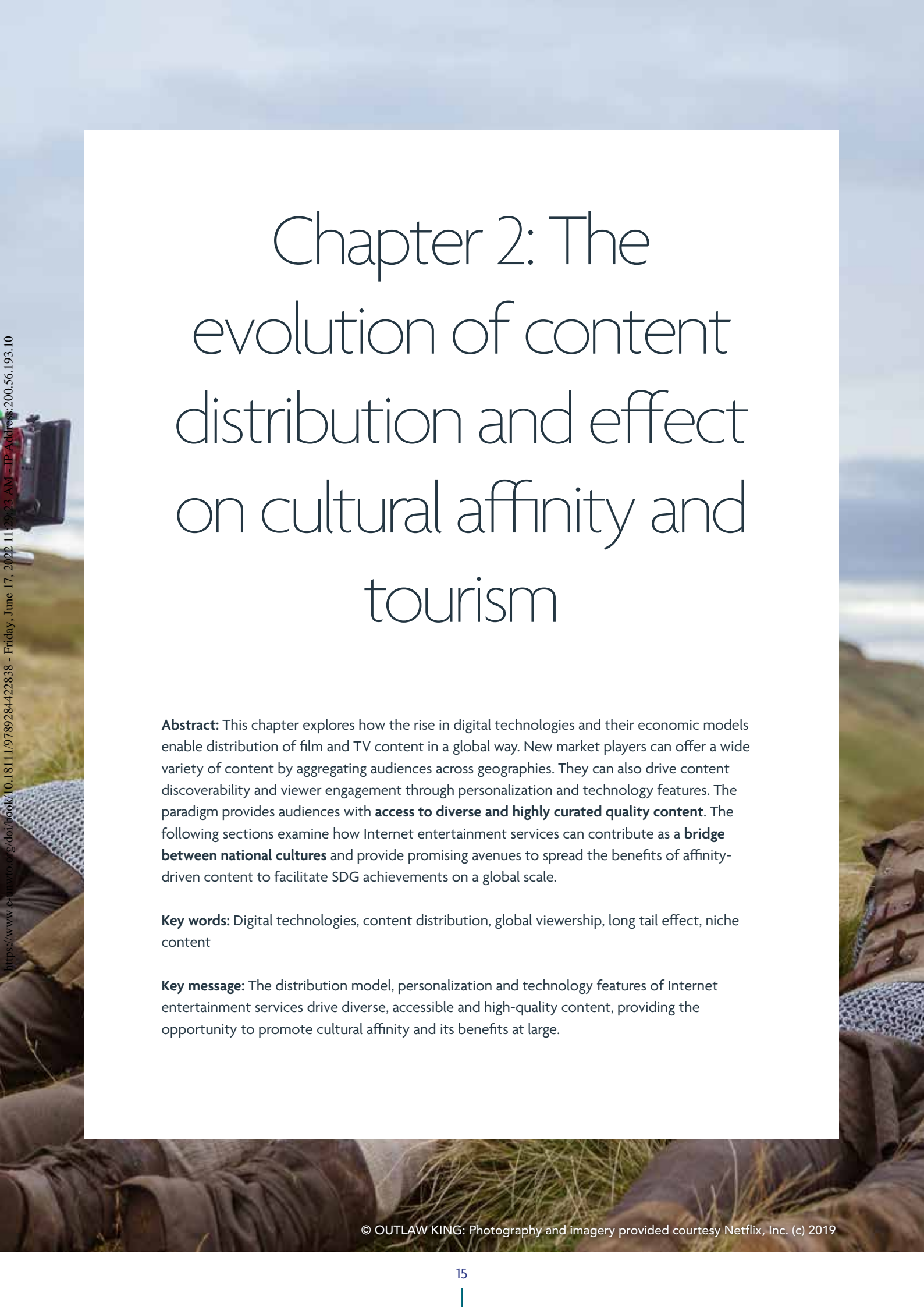
40 Bhutto, F. (2019).

show title itself and spills over to other fields such as social networks and word-of-mouth, which in turn drives more consumption.⁴¹ Low-quality productions risk being available, but not consumable, failing to capture audiences' attention to drive cultural affinity and screen tourism benefits.

This chapter explained **cultural affinity** through the context of film and video content, and the framework required to maximize its ripple effects. Chapter 2 focusses on how Internet entertainment services can contribute within this framework to drive cultural affinity.

41 ThinkBox (2019), The Age of Television: the needs that drive us (online), available at: www.thinkbox.tv/research/thinkbox-research/the-age-of-television-the-needs-that-drive-us/ (20-12-2020).
Tkalec, M.; Zilic, I. and Recher, V. (2017).



The background of the page is a photograph of a landscape. In the foreground, there is a camera on a tripod and a backpack. The background shows a grassy field with hills in the distance under a cloudy sky.

Chapter 2: The evolution of content distribution and effect on cultural affinity and tourism

Abstract: This chapter explores how the rise in digital technologies and their economic models enable distribution of film and TV content in a global way. New market players can offer a wide variety of content by aggregating audiences across geographies. They can also drive content discoverability and viewer engagement through personalization and technology features. The paradigm provides audiences with **access to diverse and highly curated quality content**. The following sections examine how Internet entertainment services can contribute as a **bridge between national cultures** and provide promising avenues to spread the benefits of affinity-driven content to facilitate SDG achievements on a global scale.

Key words: Digital technologies, content distribution, global viewership, long tail effect, niche content

Key message: The distribution model, personalization and technology features of Internet entertainment services drive diverse, accessible and high-quality content, providing the opportunity to promote cultural affinity and its benefits at large.

2.1 The evolution of screen tourism

In the beginning of the 1980s, film and tourism were considered separate areas. Early research reasoned that film *incidentally* induced tourism as a place where the cinematic narrative and the viewers' imagination materialized into reality.⁴² However, screen tourism began to grow exponentially with successful film series, such as Paul Hogan's *Crocodile Dundee*, which increased Australia-bound tourist visas by 40% from 1984 to 1989.⁴³ This budding phenomenon sparked widespread interest to launch a multidisciplinary exploration into the field.

By the 1990s, film and tourism sought complementary objectives.⁴⁴ Movies had been capturing audiences for decades, transporting them to new worlds, triggering emotions and offering an escape from reality. Separately, tourism had a similar effect: transporting persons to other places, sparking new feelings and offering an escape from the usual surroundings.⁴⁵ This insight helped establish film and tourism as interwoven sectors, sharing commonalities and motivational drivers.

Over time, the connection between the two strengthened as new tourism trends emerged around the world. In the 2000s, Switzerland, for example, became a popular tourist destination for visitors from India, as the European country presented a picturesque backdrop for many Bollywood films. Switzerland hosted on average 25 Bollywood films each year, driving its annual tourism rate up by 6% made up of fascinated Indian travellers in 2004 alone.⁴⁶

This trend has been multiplying rapidly over the last 20 years, primarily driven by changes in travel and content

consumption patterns;⁴⁷ as the "combination of cheaper and accessible air travel, combined with the birth of home entertainment, has rendered the opportunity of screen tourism inevitable"⁴⁸.

In addition to the emergence of low-cost carriers which have allowed more people to travel comfortably, conveniently and affordably, economic development has also broadened tourism to include emerging markets.⁴⁹ At the same time, the rise of direct-to-video content through VCRs, DVDs and Blu-ray discs in the 1980s and 1990s extended video consumption from beyond the cinema walls to the living room.⁵⁰ In the last decade, the media's shift to a direct-to-consumer approach and the wide expansion of Internet entertainment services have positioned video content in an affordable, accessible and global way than ever before.

2.2 New market players and distribution systems

This section explores the contribution of Internet entertainment services (IES) towards cultural affinity and screen tourism. Arguably, these services are the most recent manifestations in the evolution of content distribution and consumption, and they offer insights into how content creation and distribution can be a strong driver of cultural affinity and screen tourism moving forward.

In doing so, this chapter examines how these services such as Netflix, Amazon Prime Video, Disney Plus, HBO Max and others can strongly contribute to drive cultural affinity through diverse, accessible and quality content.

42 Conrady, R. and Buck, M. (eds., 2009), Trends and Issues in Global Tourism 2009, Springer, Berlin/Heidelberg, DOI: <https://doi.org/10.1007/978-3-540-92199-8>.

43 Baker, R. (2018), 'Thirty years of Tourism Australia: A history of iconic ads', AdNews (online), available at: www.adnews.com.au/news/thirty-years-of-tourism-australia-a-history-of-iconic-ads (15-09-2020).

44 Conrady, R. and Buck, M. (eds., 2009).

45 Gjorgievsk, M. and Trpkova, S. M. (2011), 'Movie induced tourism: a new tourism phenomenon', UTMS Journal of Economics, volume 3 (1), available at: www.utmsjoe.mk/files/Vol.%203%20No.%201/1-C3-Gjorvievski.pdf (14-09-2020).

46 Simpson, D. (2005), 'Swiss tourism bets on Bollywood', Cabi (online), available at: www.cabi.org/leisuretourism/news/15007 (14-09-2020).

47 Hudson, S. and Ritchie, J. R. (2006), 'Promoting Destinations via Film Tourism: An Empirical Identification of Supporting Marketing Initiatives', Journal of Travel Research, volume 44 (4), pp. 387–396, DOI: <https://doi.org/10.1177/0047287506286720>.

48 Zimmermann, S. and Reeves, T. (2009), Film Tourism – Locations Are the New Stars, DOI: [10.1007/978-3-540-92199-8_10](https://doi.org/10.1007/978-3-540-92199-8_10).

49 Glusac, E. (2018), 'Fly Farther, for Cheaper. For Now', The New York Times (online), available at: www.nytimes.com/2018/07/13/travel/summer-airline-fares.html (18-09-2020).

50 Horowitz-Ghazi, A. (2016), 'How the VCR Began America's Love of On-Demand Content', NPR, 06-08-2016 (online), available at: www.npr.org/2016/08/06/489002713/how-the-vcr-began-americas-love-of-on-demand-content?t=1611052219414 (22-09-2020).

Whitten, S. (2019), 'The death of the DVD: Why sales dropped more than 86% in 13 years', CNBC, 08-11-2019 (online), available at: www.cnbc.com/2019/11/08/the-death-of-the-dvd-why-sales-dropped-more-than-86percent-in-13-years.html#:~:text=At%20its%20peak%2C%20DVD%20sales,than%20DVDs%2C%20launched%20in%202006%20-12-2020.

This section analyses three main components:

- **A distribution model** that is not reliant on geographical concentration of audiences, but instead aggregates viewers from around the world, thereby enabling Internet entertainment services to carry an unparalleled range and diversity of content.
- **Personalization** features powered by algorithms which facilitate discoverability regardless of language or country of origin. This enables cultural connections between communities that may have not otherwise encountered each other.
- **Technological features**, such as subbing, dubbing and other options that help remove content viewing barriers, making films and TV series not only available but consumable for all audiences.

2.2.1 Distribution model facilitates content diversity, driving viewership

Since Internet entertainment services (IES) are not reliant on the geographical concentration of viewers, **they are able to aggregate audiences from all over the world, which enables investment in diverse and even niche content.** Consequently, IES do not view each country as a single marketplace or catalogue. “While this is especially helpful if a member is in a new or smaller market, [...] we’re also able to better serve members in larger, more established markets who have highly specific or niche tastes.”⁵¹ In other words, this allows services like Netflix, Amazon Prime Video, HBO Max, Disney Plus and more to carry a diverse slate of content to appeal to audiences both in saturated and unsaturated markets.

To understand the leverage of aggregating audiences across geographies, a theoretical example is given in the following: In a conventional media distribution setting, a cinema in India, for instance, would be less inclined to

buy or license content from Spain and show it in various theatres in New Delhi, India, due to the lack of demand to make it commercially viable. On the other hand, IES providers consider the market for Spanish content globally and aggregate audiences, regardless of where they are located. Therefore, communities in India will be able to access and watch Spanish content through these services, which opens up a new audience for such content. *Money Heist* (or *La Casa de Papel* in its Spanish original title), for example, a Spanish drama television series on Netflix, was featured on India’s Top 10 row for 170 days in 2020.⁵²

This approach is best explained through an economic theory coined in 2004: the **long tail effect**, which predicts that, as digital technologies continue to grow in the 21st century, **economies evolve from focussing on mass markets to aggregating millions of niches.** The prediction rests on the idea that in today’s competitive market, lower costs for storage and distribution make it more profitable for businesses to sell one product to each of the millions of specialized markets, rather than selling one *hit* product to as many markets as possible.⁵³

In fact, an example of this can be seen through the global success of *Mighty Little Bheem*, a children’s animation show set in India. The series quickly broke through national barriers by garnering over 27 million worldwide household views since its debut in 2019, making it Netflix’s top international release in the United States of America. Bheem, the protagonist of the series, wears a traditional Bindi, or a dot in the centre of the forehead, and is accompanied by his animal friends, such as the mischievous monkey and baby elephant, as they embark in adventures in a village where all the characters wear Indian clothing. “[For] parents seeking a break from traditional kids’ programming and its parade of pink-wearing princesses and white protagonists, the show is an easy way to introduce children to a more multicultural worldview.”⁵⁴ The global distribution of content enables children around the world to discover new cinematic experiences and enjoy a diverse-slate of content in line with their curiosities.

51 Gomez-Urbe, C. (2016), ‘A Global Approach to Recommendations’, Netflix Media Center, 17-02-2016 (online), available at: <https://media.netflix.com/en/company-blog/a-global-approach-to-recommendations> (18-09-2020).

52 PTI Agency (2020), ‘India has highest viewership of films on Netflix globally’, Telecom, 10-08-2020 (online), available at: <https://telecom.economictimes.indiatimes.com/news/india-has-highest-viewership-of-films-on-netflix-globally/79658177> (12-05-2021).

53 nderson, C. (2018), *Long Tail: Why the Future of Business Is Selling Less of More*, Hyperion e-book, p. 184, available at: https://dl.motamem.org/long_tail_chris_anderson_motamem_org.pdf.

54 Kannampilly, A. (2020), ‘Mighty little global star: Netflix’s Indian superhero toddler’, The Jakarta Post, 08-09-2020 (online), available at: <https://www.thejakartapost.com/life/2020/10/08/mighty-little-global-star-netflixs-indian-superhero-toddler.html> (10-05-2021).

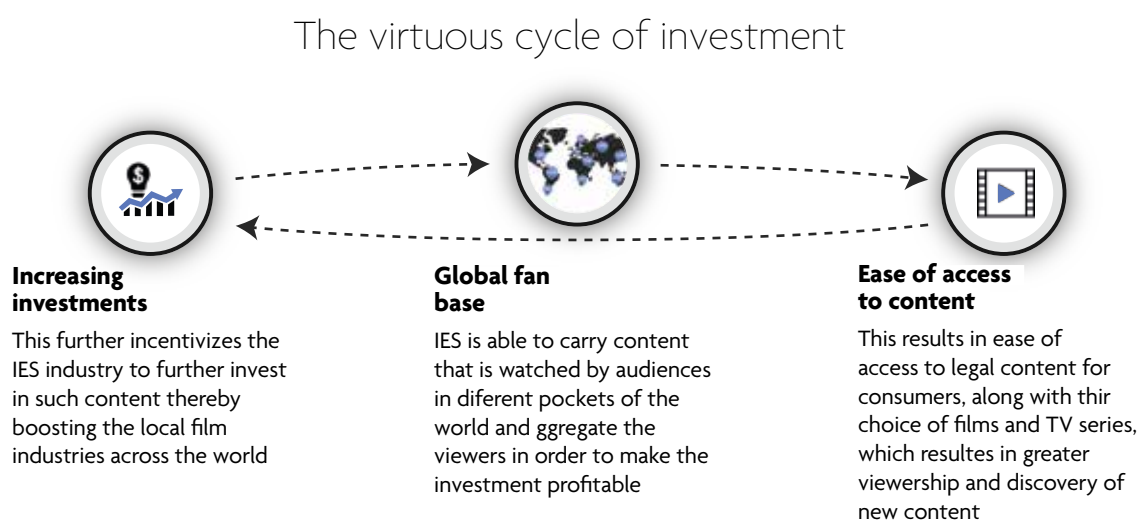
Contributing to the long tail theory, audiences today are consuming more specific or niche genres related to their interests, requiring suppliers to eliminate entry barriers for small, independent players who create and produce one-of-a-kind films and shows. IES providers can offer a promising avenue to allow local and national producers to create such content due to their ability to distribute even the most distinct titles to a global audience ready to consume it. This further incentivizes IES players to invest in such content, thereby boosting the local film industries around the world.⁵⁵

The emergence of more genres brings positive effects to local production hubs – further fuelling growth and more content creation. Since the dawn of IES, local production hubs have grown and increased in talent and revenue. From 2011 to 2015 European video production companies grew by 28% and sector employment levels increased by 7%. Indian film producers also experienced revenue growth of 38% between 2013 and 2017.⁵⁶ The film and television production in Canada generated 180,900 full-time jobs in 2019, up 21% over a five-year period.⁵⁷ In

Spain, the number of locally produced TV series rose from 38 in 2015 to 58 in 2018; and the sector contributed EUR 655 million to the country's economic output in 2018, up from EUR 429 million three years prior.⁵⁸

Bringing the theory to life, the distribution model and global reach of IES directly correlate to their rapid and successful expansion. In 2015, Netflix had presence in 50 countries. Two years later, it had viewers in over 190 countries, with 73 million people watching content from outside the United States of America.⁵⁹ Amazon Prime Video has also surged in viewership as it continues expanding audiences. In 2019, Amazon Prime Video had 100 million more viewers than the previous year, with a forecast to reach one third of the population in the United States of America.⁶⁰ As of October 2020, Disney Plus surpassed its initial five-year goal by reaching 73.7 million subscribers with future plans to expand its direct-to-consumer strategy.⁶¹

Figure 2.1



Source: Disal Consulting

55 Wolk, A. (2017), 'Niche Content Is Finally Going Mainstream', Forbes, 28-12-2017 (online), available at: www.forbes.com/sites/alanwolk/2017/12/28/niche-content-is-finally-going-mainstream/?sh=b816a256921a (22-09-2020).

56 Blackburn, D.; Eisenach, J.A. and Soria, B. (2019), 'The Impact of Online Video Distribution on the Global Market for Digital Content', NERA Economic Consulting, available at: www.nera.com/content/dam/nera/publications/2019/NERA-The-Impact-of-Online-Video-Distribution.pdf (16-12-2020).

57 Canadian Media Producers Association (2019), 'Profile 2019: Economic Report on the Screen-Based Media Production Industry in Canada', CMPA, available at: https://cmpa.ca/wp-content/uploads/2020/04/CMPA_2019_E_FINAL.pdf.

58 PricewaterhouseCoopers (2018), 'La oportunidad de los contenidos de ficción en España', available at: <https://www.audiovisual451.com/wp-content/uploads/2019/03/La-oportunidad-de-los-contenidos-de-ficcion-en-Espa%C3%B1a.pdf> (22-09-2020).

59 Brennan, L. (2018), 'How Netflix Expanded to 190 Countries in 17 Years', Harvard Business Review, 12-10-2018 (online), available at: <https://hbr.org/2018/10/how-netflix-expanded-to-190-countries-in-7-years> (22-09-2020).

60 Csathy, P. (2020), 'Amazon Prime Video: The Stealthy, Ominous Streaming Force', Forbes, 31-01-2020 (online), available at: www.forbes.com/sites/petercsathy/2020/01/31/amazon-prime-video-the-quiet-ominous-streaming-force/#99efcd91fa6 (04-07-2020).

61 Barnes, B. (2020), 'Disney+ Passes 73 Million Subscribers as Streaming Takes Center Stage', The New York Times, 11-12-2020 (online), available at: <https://www.nytimes.com/2020/11/12/business/media/disney-plus-73-million-subscribers.html> (23-04-2021).

2.2.2 Personalization features lead to content access

IES personalization features drive discoverability and allow viewers to access content in line with their preferences. This enables Netflix, HBO Max, Amazon Prime Video, Disney Plus and similar services to connect audiences with specific content they would have never been exposed to or have access to. In turn, this results in new cultural connections formed between communities that may not have otherwise encountered each other. New connections allow for more opportunities to spread cultural affinity and beyond.⁶²

2.2.3 Technological features lower viewing barriers for greater content access

Technological features, such as subbing, dubbing, audio descriptions, closed captions and other options **reduce language and disability viewing and hearing barriers to allow video content to travel and be consumable to traditionally out-of-reach markets.** These features allow audiences not only to access new content, but also to watch them in a way that may widen the opportunity to spread positive perceptions, tourism and cultural affinity more effectively.

Box 2.1

Examples of Internet entertainment services' capacity of personalization features to increase consumption of diverse content



Since the birth of this genre in the early 1900s, Anime communities have been mostly represented in Japan. Nowadays, Netflix data show that only 10% of Anime content consumers are located there, 90% are from the rest of the world.

The Spanish drama *Elite* released in 2018 garnered 20 million household views in the first month after release. **Most of them came from outside of Spain**, including Argentina and Mexico.

Since 2017, the German science fiction has been watched by millions in the United States of America and Mexico, **9 out of 10 viewers of the series were from outside Germany.**

Source: Netflix

62 Netflix Help Center, How Netflix's Recommendations System Works (online), available at: <https://help.netflix.com/en/node/100639>

Although the art of dubbing has long been a staple in the media and entertainment marketplace, IES players are building their capacities to offer high quality dubbed content using both technology advancements and industry talents.⁶³ This opens an opportunity to create a new genre of films and TV series in a new market as many viewers consume dubbed versions of international content in addition to subtitled ones. Netflix, HBO Max, Amazon Prime Video, Disney Plus and other similar services believe that dubbing services “can boost overall viewership of non-English series among the world’s 371 million native English speakers – most of whom live in the United States of America – by creating better English dubs that will attract people who might be put off by low quality ones”⁶⁴ – over 70% of viewers in the United States of America chose dubbed Netflix shows that were originally in German or Spanish,⁶⁵ for instance. These technology features allow viewers to access non-English speaking content and consume it without language barriers.

In addition to subtitles and dubbing, Internet entertainment services are committed to building their capabilities in offering **embedded audio and text features for impaired viewers**. This means incorporating screen readers and audio access for users who are blind or visually disabled. For viewers with hearing impairments, IES providers offer a ‘closed caption’ feature which is similar to subtitles but provides a more comprehensive explanation for background sounds and soundtrack information.⁶⁶ In 2015, Netflix launched a new audio description feature that provides voice narration of onscreen events. The voiceover describes scenes in detail, capturing facial expressions, physical actions, scene settings, costume designs and background changes.⁶⁷ Based on the American Council of the Blind, Netflix offers 643 titles in 38 languages of described TV series, documentaries, original programming and

children’s content for visually impaired persons.⁶⁸ Amazon Prime Video has roughly 350 titles with audio descriptions.⁶⁹

IES providers **continue to invest in accessible content to foster inclusive viewership**. In 2020, Netflix launched a new play-back feature, which adjusts the accelerated or slowed-down voice pitch to sound more natural. Advocates for the deaf and blind are commending the new feature, saying it is a victory for those who rely on playback functions to enjoy the cinematic experience. Everette Bacon of the National Federation of the Blind states that, “our ears are kind of trained over time to listen at a quicker speed, and so allowing us to do the same thing on a show like a documentary or some type of other content – it really helps a whole lot when you’re trying to consume such great content in mass quantity”⁷⁰.

To summarize, lower viewing barriers and higher content access increase the chances of content to reach more viewers, widening the potential impact of cultural affinity and its positive effects.

2.2.4 The distribution model, personalization and tech features of Internet entertainment services drive diverse and quality content

The unique business model of IES enables high-quality and diverse content to thrive – a nod to the long tail theory of the growing niche demand. Niche content is garnering quality and high-standard recognition amongst the industry’s most reputable players. In 2020 alone, movies distributed through Netflix received 24 nominations at the Oscars. Meanwhile, the Amazon Prime Video Original *Cold War* was also nominated

63 ‘Dubbing is coming to a small screen near you’ (2019), The Economist, 21-12-2019 (online), available at: www.economist.com/christmas-specials/2019/12/21/dubbing-is-coming-to-a-small-screen-near-you (05-10-2020).

64 Goldsmith, J. (2019), ‘Netflix Wants to Make Its Dubbed Foreign Shows Less Dubby’, The New York Times, 19-06-2019 (online), available at: www.nytimes.com/2019/07/19/arts/television/netflix-money-heist.html (16-12-2020).

65 Goldsmith, J. (2019).

66 Netflix Partner Help Center, Why are Netflix’s standards for Subtitles and Closed Captions so high?, Frequently asked questions (online), available at: <https://partnerhelp.netflixstudios.com/hc/en-us/articles/214969868-Why-are-Netflix-s-standards-for-Subtitles-and-Closed-Captions-so-high-> (27-06-2020).

67 King, H. (2015), ‘Netflix introduces audio descriptions for visually impaired’, CNN Business, 14-04-2015 (online), available at: <https://money.cnn.com/2015/04/14/technology/netflix-visually-impaired/> (05-10-2020).

68 American Council of the Blind (2020a), The Audio Description Project – Netflix Titles, (online), available at: <http://acb.org/adp/netflixadother.html> (27-01-2021).

69 American Council of the Blind (2020b), The Audio Description Project – Prime Video Titles (online), available at: <https://acb.org/adp/amazonad.html> (27-01-2021).

70 Fadel, L. (2020), ‘Advocates For Deaf And Blind Laud Netflix’s New Playback Features’, NPR, 08-08-2020 (online), available at: <https://www.npr.org/2020/08/08/900536509/advocates-for-deaf-and-blind-laud-netflixs-new-playback-features?t=1620643313956> (10-05-2021).

for three Academy Awards. Due to its ability to make content globally accessible, discoverable and consumable, non-mainstream IES content is being recognized for its quality and standards.⁷¹

The film *Roma*, a successful and high-quality niche movie is an example of this. In an interview with *Deadline*, Alfonso Cuarón, *Roma*'s director and filmmaker, admits that the film does not 'fit' into any traditional genre of film. Cuarón commented that he "made a movie that on paper seems very unlikely and very difficult", saying that "it's a drama, it's not a genre film, it's black-and-white, it's in Spanish and Mixtec. When it was presented, the actors were not recognizable. It was like something that could have ended in just one theatre in Los Angeles and one theatre in New York and one theatre in several cities around the world".⁷²

Another example of how non-mainstream IES content is being recognized for its quality and standards is Amazon Prime Video's *Sound of Metal*, which received six Oscar nominations in 2021.⁷³ The story follows the journey of a heavy metal drummer who loses his hearing. The film not only places a spotlight on the normatively disenfranchised and underrepresented deaf community in the media, but it also allows audiences to connect with a very specific experience using a distinct narration style and non-traditional script.⁷⁴ A review in the *New York Times* claims that "though underwritten and dramatically muted, this unusual movie diverts with an extraordinarily intricate sound design that allows us to borrow [the protagonist's] ears".⁷⁵ Amazon Prime Video's *Sound of Metal* is a high-quality work of art that appeals to niche audiences by building links with viewers across cultures and geographies, allowing audiences to identify themselves in the experiences of others.

A third example of how IES have broadened exposure of content is Netflix' *Period. End of Sentence*, a short film which garnered the Best Documentary (short subject) win at the 2019 Academy Awards. The film depicts women in an Indian village who come together to manufacture affordable menstrual pads, often a shunned and taboo subject. Rayka Zehtabchi, the film's director, welcomed the challenge of making a "beautiful film that took audiences on a journey with these characters, rather than a straight journalistic treatment". The Oscar award brought recognition to a unique narrative of an often-sidelined subject matter.⁷⁶

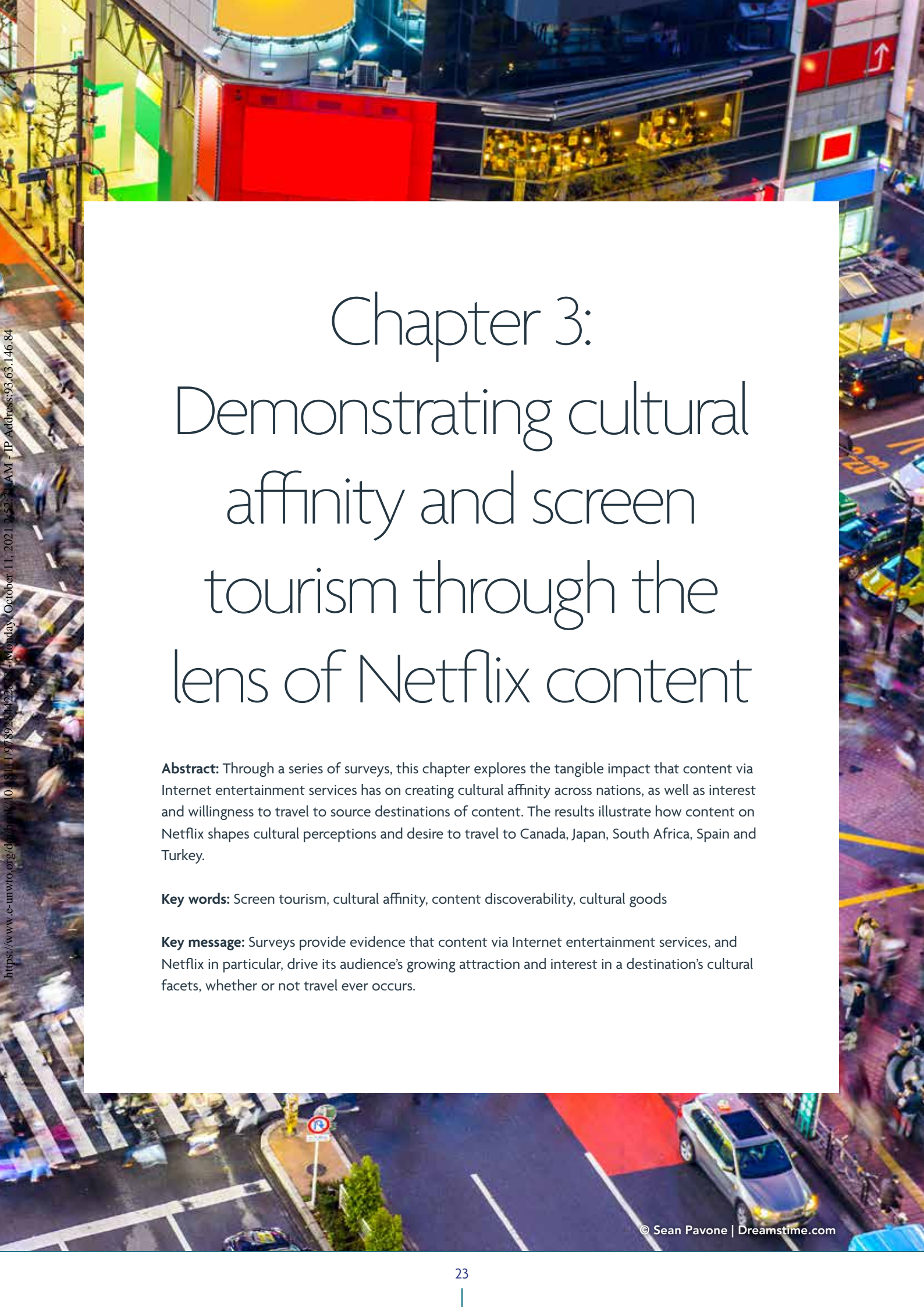
In an interview with ABS-CBN News, Netflix's founder Reed Hastings stated that "in every nation there's a great tradition of storytelling and if you can capture it on film then we can really share it with the world".⁷⁷

According to Hastings, people are curious and "everyone wants to understand other parts of the world [...]".⁷⁸ This results in a higher spread of cultural affinity and positive effects that can boost local production hubs, benefiting whole economies now and in the future.

This chapter explored the unique business model of Internet entertainment services and their key features that drive revenue and growth. Linking back to the earlier framework of diverse, accessible, and quality content, these characteristics of IES players offer a promising opportunity to drive cultural affinity and its benefits at large.

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Chapter 3: Demonstrating cultural affinity and screen tourism through the lens of Netflix content

Abstract: Through a series of surveys, this chapter explores the tangible impact that content via Internet entertainment services has on creating cultural affinity across nations, as well as interest and willingness to travel to source destinations of content. The results illustrate how content on Netflix shapes cultural perceptions and desire to travel to Canada, Japan, South Africa, Spain and Turkey.

Key words: Screen tourism, cultural affinity, content discoverability, cultural goods

Key message: Surveys provide evidence that content via Internet entertainment services, and Netflix in particular, drive its audience's growing attraction and interest in a destination's cultural facets, whether or not travel ever occurs.

3.1 The surveys – methodological note

Netflix commissioned surveys from 2020 to 2021 to study viewer impact and reactions from having been exposed to content originating from five countries, including Canada, Japan, South Africa, Spain and Turkey. Surveys were carried out outside the country of origin and included 2,250 respondents per market across five markets, with the exception of the surveys of Turkish content, which totalled to 8,274 respondents across eight markets.

3.1.1 The test group analysis

- The markets chosen for this research were based on the following criteria: i) their global coverage, and ii) the presence of the examined country's content within these markets, which includes:
 - Canadian content was tested across five markets, including Australia, France, Germany, Sweden and the United States of America (in each market, c. 2250 respondents were interviewed: c. 1500 Netflix users, c. 750 non-users).
 - Japanese content was tested across five markets, including France, Germany, Mexico, the Republic of Korea and the United States of America (in each market, c. 2250 respondents were interviewed: c. 1500 Netflix users, c. 750 non-users).
 - South African content was tested across five markets, including Canada, France, Germany, the United Kingdom and the United States of America (in each market, c. 2250 respondents were interviewed: c. 1500 Netflix users, c. 750 non-users).
 - Spanish content was tested across five markets, including Argentina, France, Germany, Mexico and the United States of America (in each market, c. 2250 respondents were interviewed: c. 1500 Netflix users, c. 750 non-users).
 - Turkish content was tested across eight markets, including Argentina, Australia, Brazil, France,
- India, Kingdom of Saudi Arabia, Sweden and the United States of America (with 8,274 total respondents in 8 markets, n=3,773 treatment [viewers of Turkish content on Netflix] and a n=4,537 control [non-viewers] group).
- In order to best capture and define the content viewers within the tested countries, the surveys focussed on respondents who have either watched any of the content list (Netflix titles of the examined country) or claim to watch the examined country's content in general. As expected, there is a lot of overlap between the two groups, but this helps fully capture the current audience (i.e., capturing people who have watched content set in said country aside from the 20 Netflix titles that were tested in each survey).
- Examining the responses, the surveys indicate:
 - Direct questioning (e.g., *How did watching this show impact your opinion of [country]?*) reveals the positive impact that watching content has on affinity – and this **positive impact comes through whether people have been to the country before or not**. Data was collected via a 20-minute online questionnaire. Quotes in section 3.2, 3.3 and 3.4 of this report includes responses to open-ended questions within the survey.
 - Differences can be seen in the demographic profile of our test groups (Netflix users vs. non-users, viewers who have seen content from an examined country vs. non-viewers). Netflix users skew younger and more affluent across all markets, as do those who have seen country-driven content. Naturally this raises the question as to whether or not the differences we see across test groups are real and can be attributed to country-specific content – or whether or not they are results of demographic differences in our sample. In order to validate this, any differences identified hold true when each of the test groups are filtered on comparable demographics. This included looking at:
 - ◊ Different age groups (e.g., 18–34s, 35–54s and 55+)

- ◊ Income levels of the respondents (e.g., high, medium, low-income brackets)
- ◊ Those that may already have a higher affinity for a specific country (e.g., those who speak the foreign language fluently, or have visited the country)
- Regardless of which groups were filtered on, the outcome did not change – e.g., Netflix users who have watched content originating from an examined country are consistently more positive, irrespective of the group considered. Ultimately this gives confidence in drawing conclusions at the total group level.
- The results are cross-checked among respondents with higher pre-existing levels of affinity – e.g., have they been to the country before, or speak the language (and the results stand).
- Fieldwork was conducted in 2020 to 2021. Notes were included throughout the survey referencing the COVID-19 pandemic and asking respondents to answer assuming we were in more normal times (e.g., all travel restrictions had been lifted).

3.1.2 The overall outcome

The surveys demonstrate that screen tourism is a thriving phenomenon, even via online channels, and conclusively provides evidence of the halo effects of cultural affinity through content. The studies show that

audiences of affinity-driven films and TV series are not only interested in travelling to such destinations, but they also show higher fascination and attraction towards the local wildlife, heritage, language, people, literature, gastronomy, and other cultural facets. The surveys verify that although tourism is one outcome, the phenomenon can also contribute to a higher demand for tangible and intangible goods, as well as other positive implications on a country's brand.

These results also demonstrate that Netflix connects its users with new or specific films and TV series that **audiences may have never otherwise encountered**, which is facilitated by access, discoverability and consumption of diverse content. This encourages new cultural connections, which widens the possibility of building attraction and affection towards a specific country or culture, and thus facilitating the culturally motivated tourist and contributing towards a sustainable sector.

The data and survey set point to three key conclusions:

- Audiences who watch content from other countries or cultures are **more likely to travel** to the featured destinations.
- Beyond travel, there is a **higher stated interest in supporting a broader value chain**, namely greater fascination and attraction towards cultural goods, such as a country's famous landmarks, gastronomy, local history, cultural products, language and people.
- Netflix **facilitates the discoverability** of such content

N SERIES

STRANGER THINGS

When a young boy vanishes, a small town uncovers a mystery involving secret experiments, terrifying supernatural forces and a strange little girl.



Play



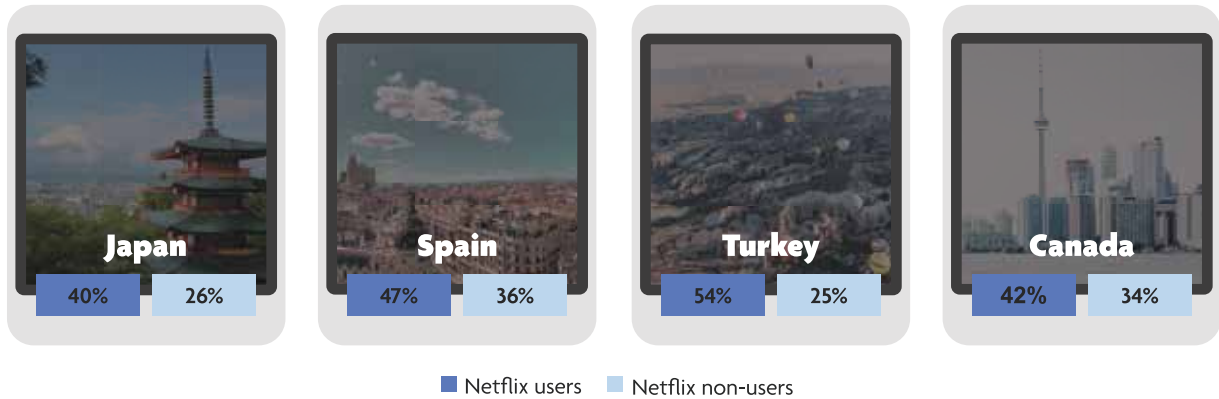
My List

© Netflix

3.2 Audiences who watch content from other countries or cultures are more likely to travel to the featured destinations

Figure 3.1

When exposed to content from a certain country, Netflix users express higher desire to travel to said country

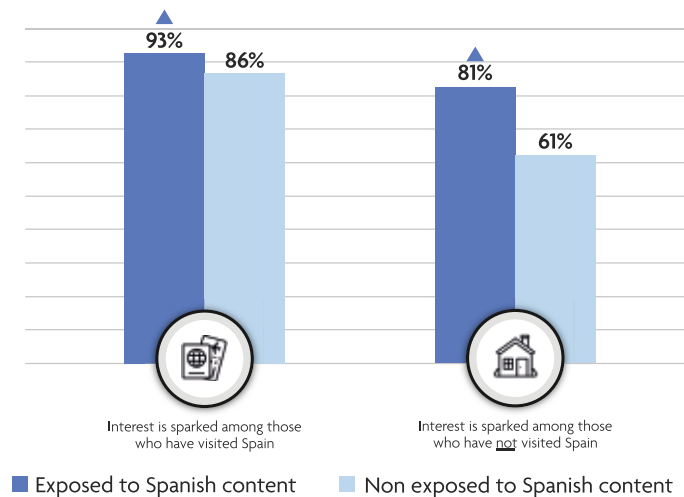


When asked which of the following statements best describes how you feel about visiting Japan/Spain/Turkey/Canada to Netflix users and non-users. The figures above represent the average response across multiple markets. Prepared by Istanbul Economics Research, 2020. *The impact of Netflix Turkish Content on Cultural Affinity and Tourism around the Globe*;
Prepared by Basis, 2020. *Evaluating the Impact of Japanese/Spanish/Canadian Content on Cultural Affinity & Tourism*.



Figure 3.2

Exposure to Spanish content has significant potential to boost tourism to the country, regardless of previous travel

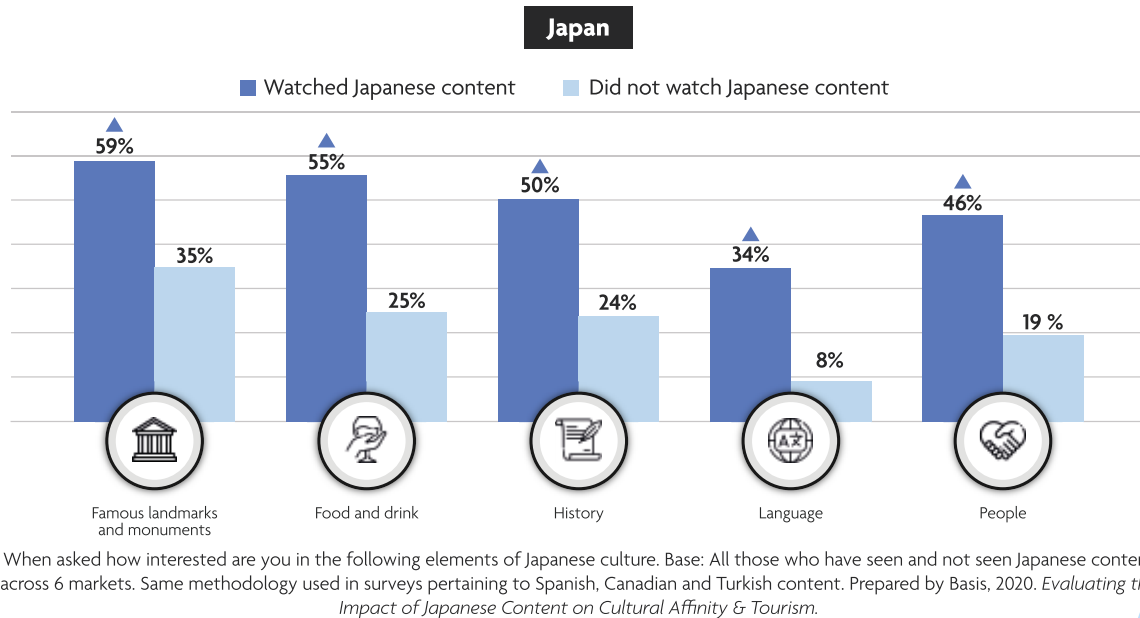


When asked which of the following statements best describes how you feel about visiting Spain in the future. The survey is an average of six markets and were asked to answer assuming all travel restrictions have been lifted. Prepared by Basis, 2020. *Evaluating the Impact of Spanish Content on Cultural Affinity & Tourism*.

3.3 Beyond travel, there is a higher stated interest in supporting a broader value chain, namely fascination and attraction towards cultural goods

Figure 3.3

Viewers who watch country-related content show higher interest in cultural aspects than non-viewers



"...influenced me in a positive way, made me see that there is a lot of talent in that country"

Female, 32, United States of America

3 out of 5

viewers who watch Netflix shows such as Solo, The Skin of the Wolf, and 4L develop a specific interest in

Spanish nature and wildlife

68%

of Netflix users show higher interest in

Japanese fashion

after watching *Queer Eye: We're in Japan!*

"Japan provides a great backdrop for TV shows and movies. On the one hand there are the great landscapes, on the other modern cities. In addition, the Japanese food is always beautiful to look at"

Male, 71, Germany

Figure 3.4

Affinity through content drives cultural closeness that triggers higher interest in a country's culture, environment and people

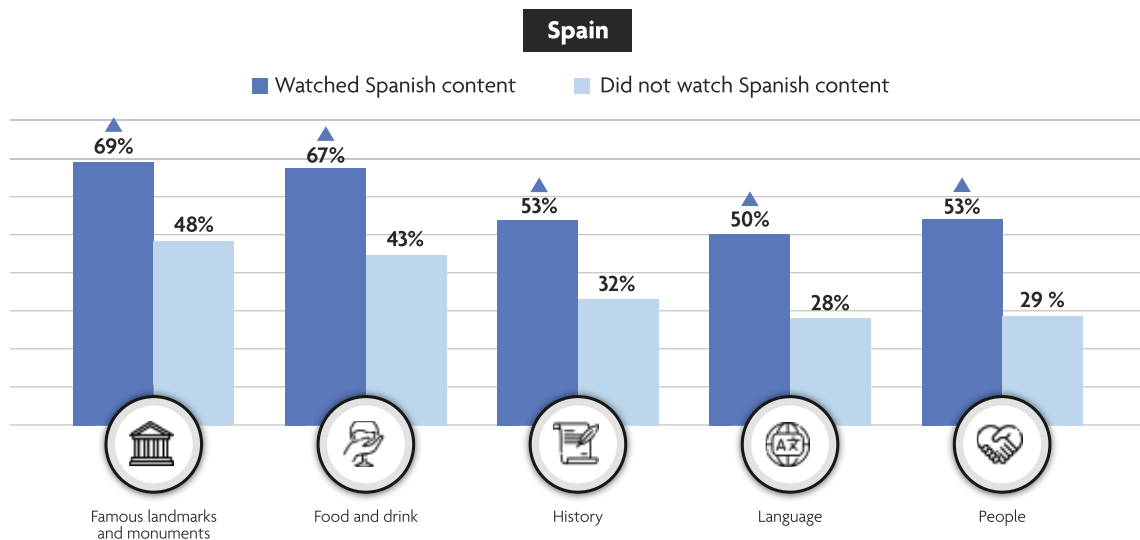
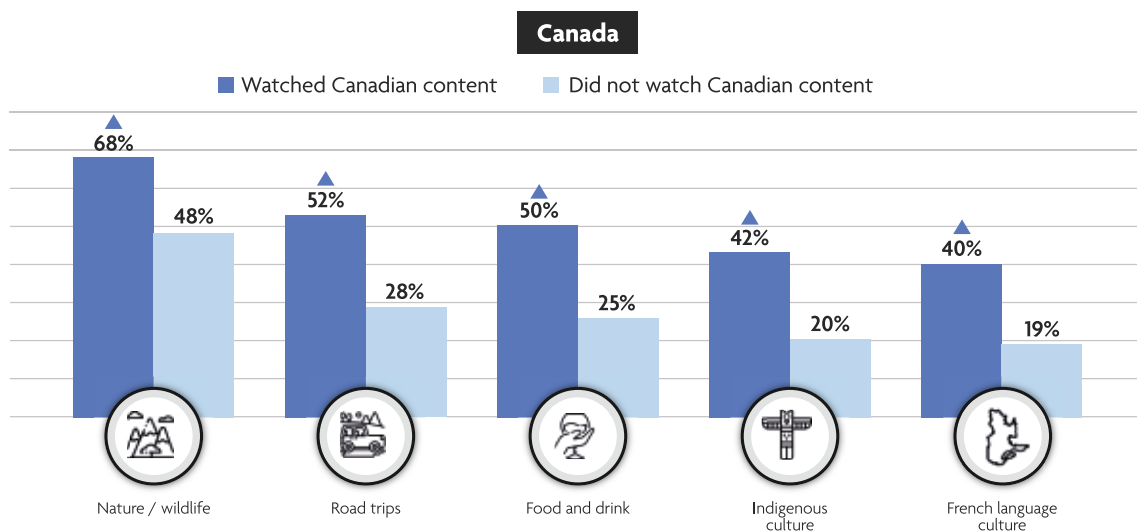


Figure 3.5

This heightened interest spans across many aspects of Canadian culture notably nature, travel preferences, food and drink, indigenous and French language cultures



Prepared by Basis, 2020. *Evaluating the Impact of Canadian Content on Cultural Affinity & Tourism.*

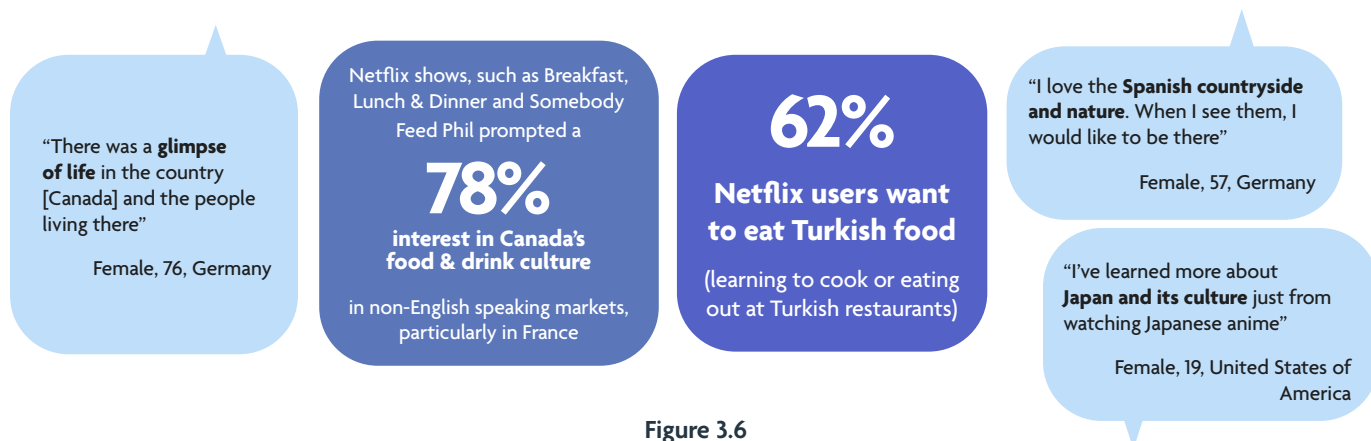
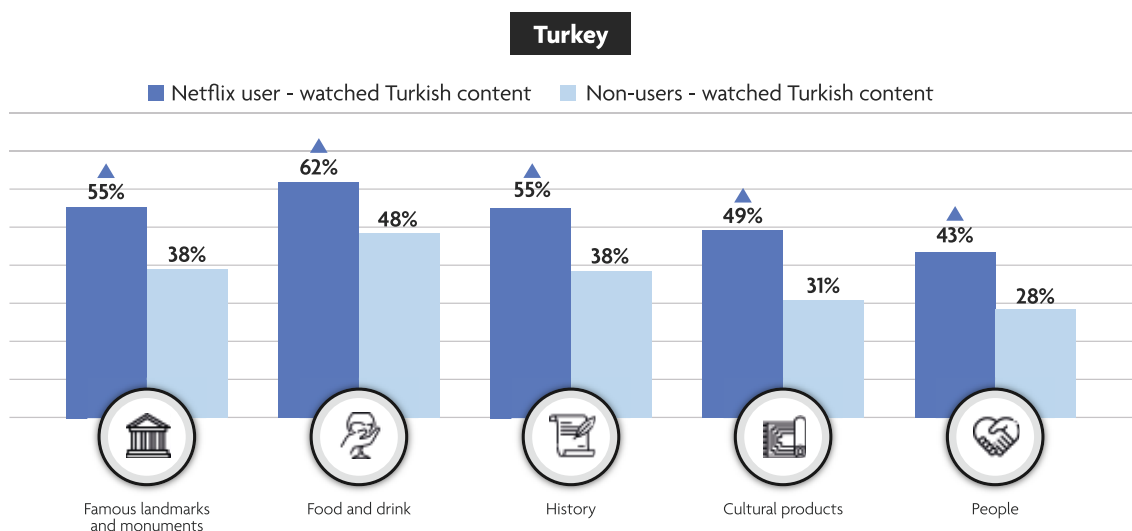


Figure 3.6

Netflix users who watch Turkish content express higher feelings of attraction towards cultural goods



Prepared by Istanbul Economics Research, 2020. *The Impact of Netflix Turkish Content on Cultural Affinity and Tourism around the Globe.*

A Spotlight on Language:

Subbing and dubbing features spark higher fascination for a country's language, both for learning and practice purposes

Figure 3.7

Watching Spanish content encourages people to further engage with the Spanish language

Interest in aspects of Spanish culture | T2B% interested, Global average

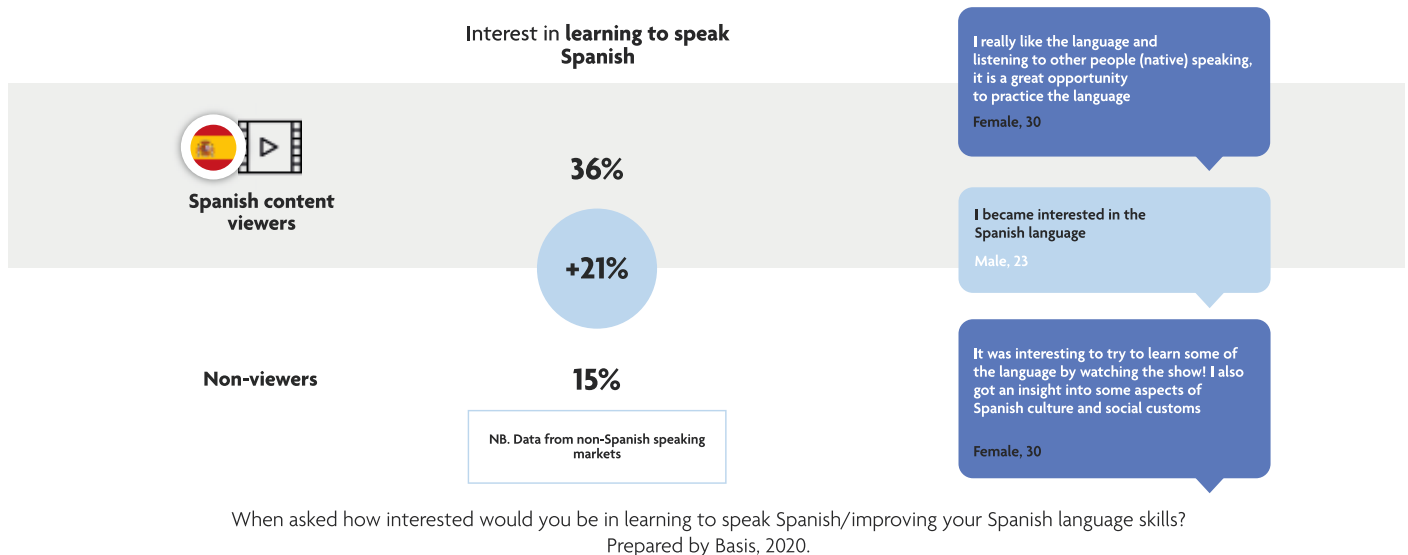
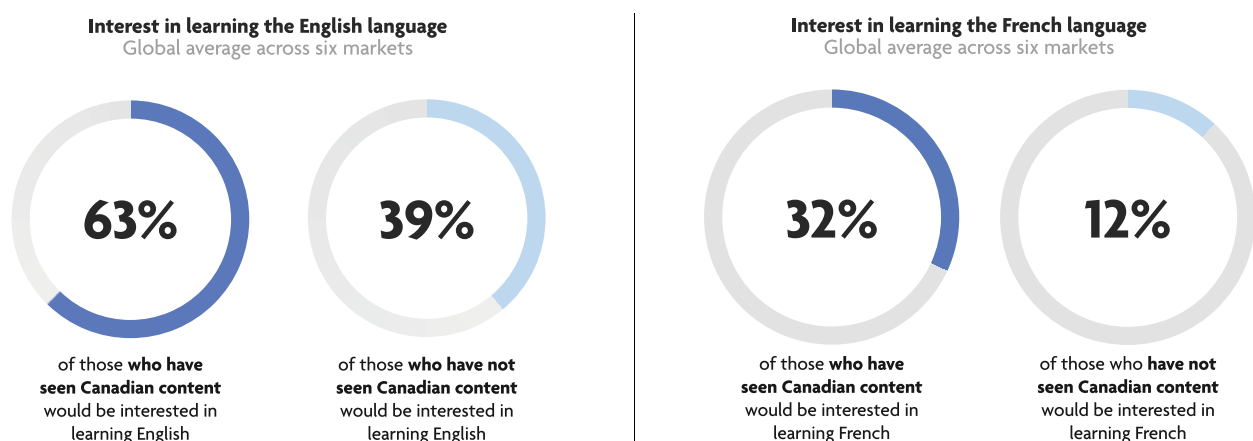


Figure 3.8

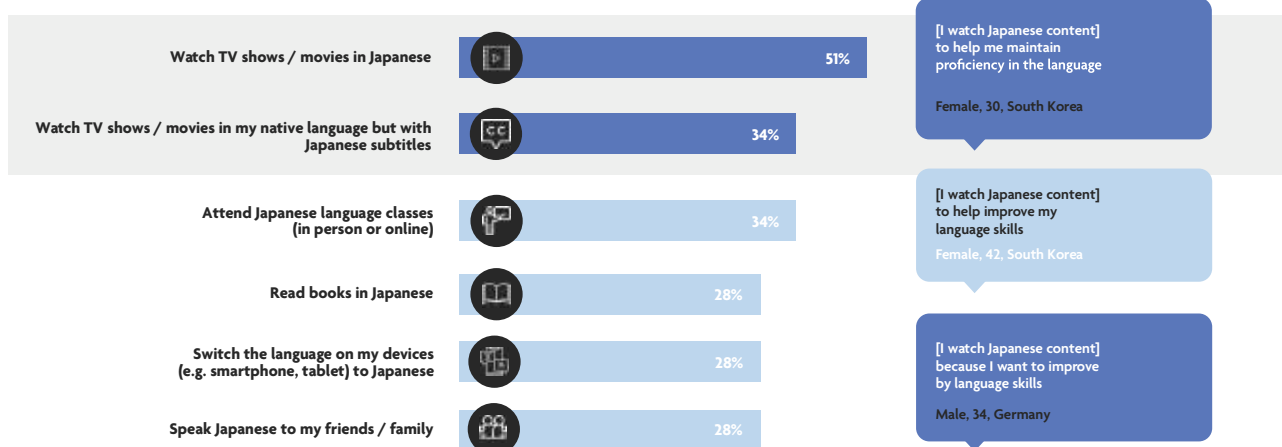
Canadian content has a unique advantage to inspire interest in learning two languages: English and French



When asked how interested would you be in learning to speak English/French or improving your English/French.
Prepared by Basis, 2020. *Evaluating the Impact of Canadian Content on Cultural Affinity & Tourism.*

Figure 3.9

For audiences who already speak some Japanese, watching TV shows/movies in the language is the main way of improving skills



When asked do you currently do any of the following to help stay on top or improve your Japanese language skills. Respondents from 5 non-Japanese speaking markets, namely USA, France, Germany, Mexico and South Korea. Prepared by Basis, 2020. *Evaluating the Impact of Japanese Content on Cultural Affinity & Tourism.*

People who are exposed to Japanese content are

6x

more likely to express interest in learning the language

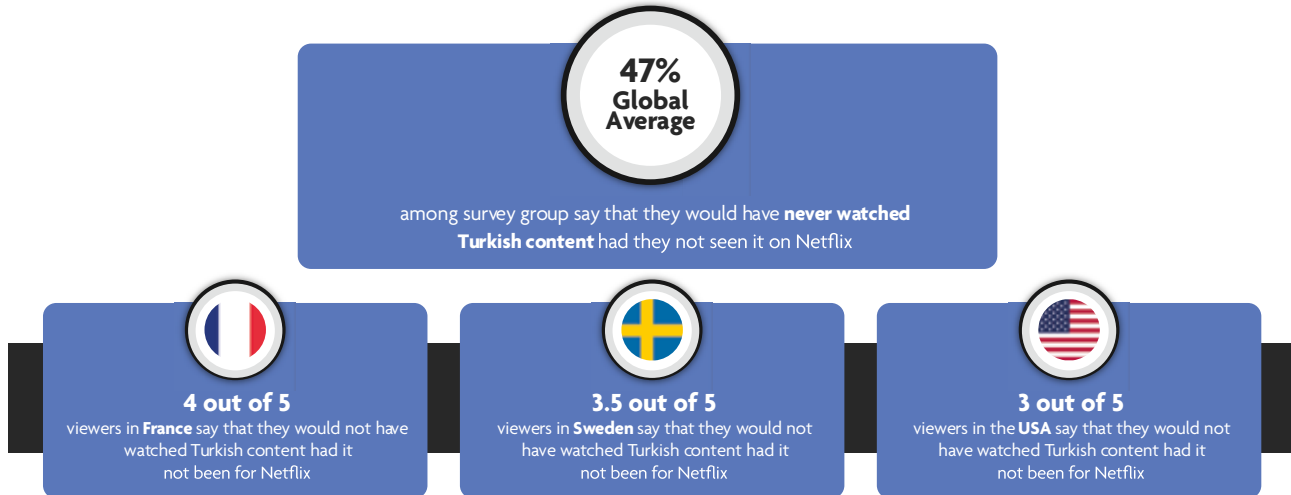


© Noblige | Dreamstime.com

3.4 Netflix facilitates the discoverability of such content

Figure 3.10

Disaggregation of audiences allows diverse content to thrive, creating new cultural connections unrestricted by local demand trends



Study was conducted across 8 non-Turkish speaking markets. Prepared by Istanbul Economics Research, 2020. *The Impact of Netflix Turkish Content on Cultural Affinity and Tourism around the Globe.*

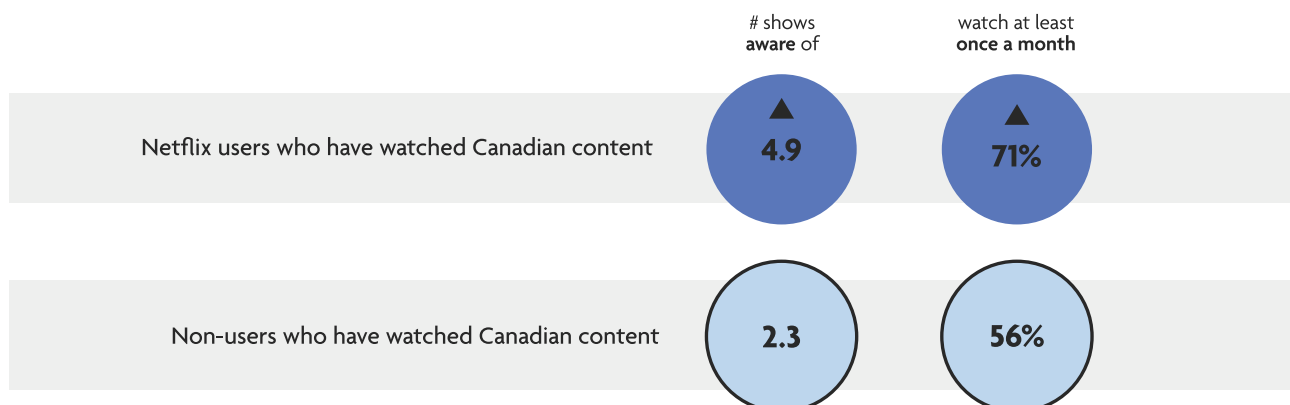
Frequent viewing habits further drive cultural affinity through content, as surveys show **Netflix users** in France who watch Canadian content show **10% greater fascination** for Canadian culture

“...I really **felt connected** with the country [Turkey] through the characters”

Figure 3.11

Ease of access to content motivates likelihood and frequency of viewership

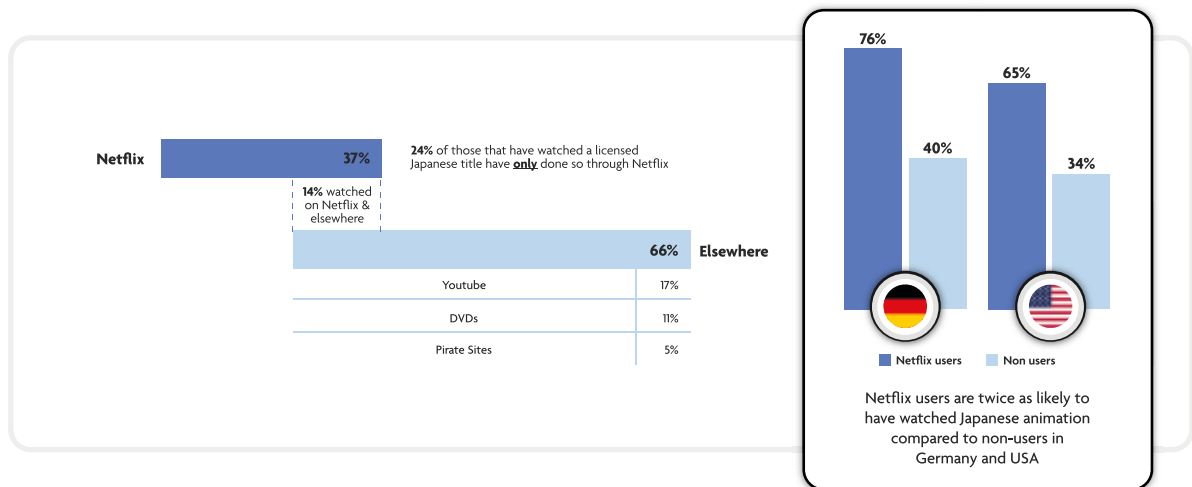
Interest in Canadian content | Global Average



When asked which of the following TV shows and movies have you heard of before and how often would you say you watch TV shows or movies that are set or filmed in each of the following countries. Prepared by Basis, 2020. *Evaluating the Impact of Canadian Content on Cultural Affinity & Tourism.*

Figure 3.12

IES subbing and dubbing features make niche content accessible to a global audience



When asked where have you watched these TV shows / movies. Prepared by Basis, 2020. *Evaluating the Impact of Japanese Content on Cultural Affinity & Tourism.*

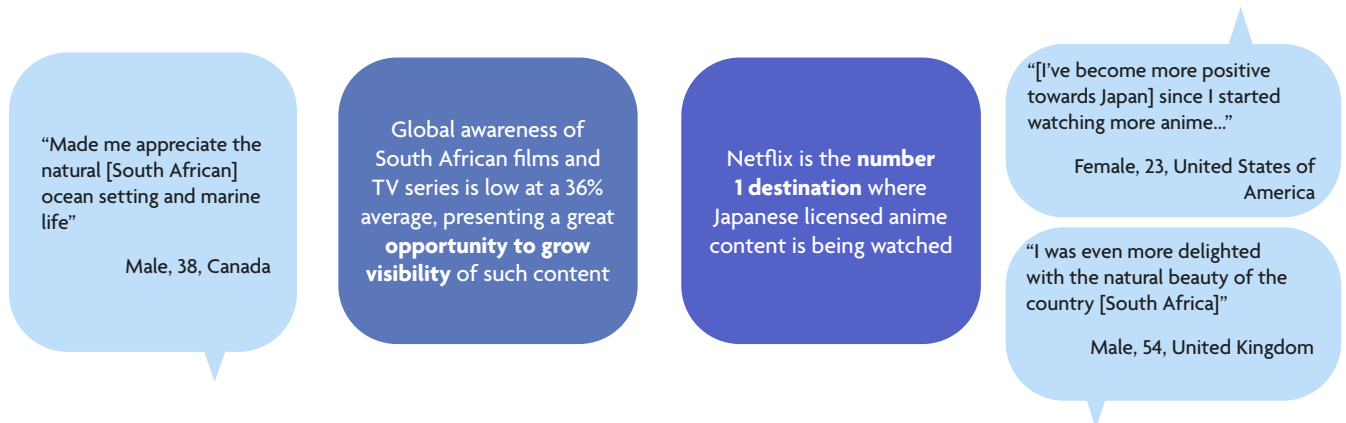
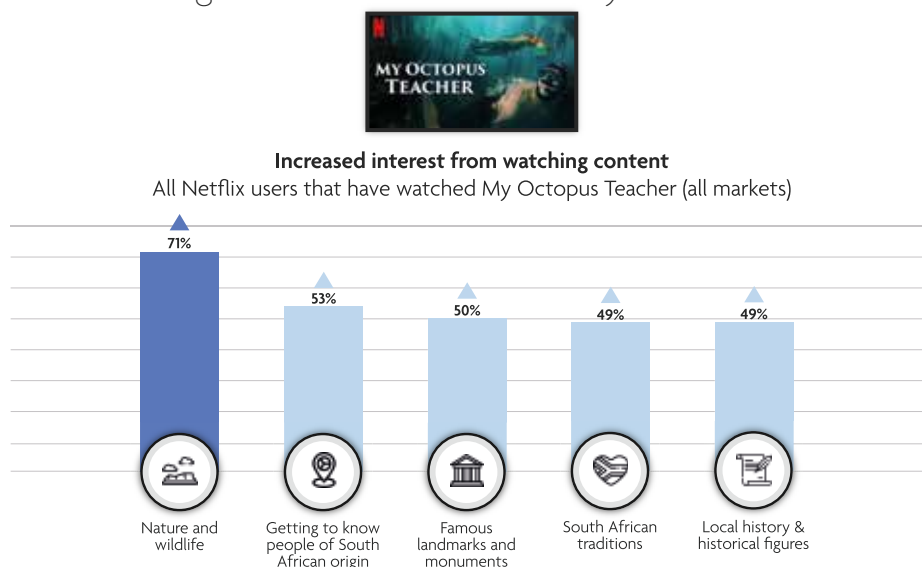


Figure 3.13

High quality South African titles, such as My Octopus Teacher, motivates higher interest in the country's nature and wildlife



Prepared by Basis, 2020. *Evaluating the Impact of South African Content on Cultural Affinity & Tourism.*

Global awareness of
South African films
and TV series is low
at a 36% average,
presenting a great
**opportunity to grow
visibility** of such
content





Chapter 4: Partnerships for a better future

“Again and again, the pandemic puts us to the test and proves that we are stronger if we act together and not in isolation.”

Zurab Pololikashvili

Secretary-General, World Tourism Organization (UNWTO)

Abstract: This chapter seeks to explore and study the impact that new content distribution systems, i.e., Internet entertainment services (IES), have on cultural connectedness through film and TV series. Going beyond traditional thinking of *screen tourism*, a broader approach was taken to understand the full extent of this impact, for example, by taking into account the interest in cultural and heritage goods, as well as the spread of cultural influence. In this closing chapter, reflection is made on the unexpected and unprecedented challenges presented by the COVID-19 pandemic, proposing that multi-stakeholder collaboration is now more important than ever, if societies and economies are to rebuild stronger and more sustainably. It lays out a few recommendations for various stakeholders to consider in order to maximize the benefits that screen tourism and cultural affinity bring through IES.

Key words: COVID-19, economic restart, global collaboration, community-focussed initiatives

Key message: Given the detrimental impact of the COVID-19 pandemic, the film and TV industry, as well as the tourism sector, play an important role in rebuilding social and cultural links through multi-stakeholder collaborations to restart economic activity.

4.1 Unexpected crisis and emerging opportunities

The impact of the COVID-19 pandemic cannot be overstated in terms of the painful economic and societal cost globally. As with many sectors, the tourism, cultural and creative sectors have suffered greatly.

Lockdowns, social distancing, travel restrictions and isolation have disrupted supply chains and reduced the workforce across almost all economic sectors, causing job loss, school closings and business closures. According to the International Labour Organization, over 400 million full-time jobs were lost in the second quarter of 2020, stranding millions of families in financial turmoil and uncertainty.⁷⁹ On the frontlines, the crisis has upended the global tourism sector, resulting in over 1 billion fewer international tourist arrivals in 2020. According to the latest *UNWTO World Tourism Barometer*, the collapse in international travel represents an estimated loss of USD 1.1 trillion in export revenues – more than 11 times the loss recorded during the 2009 global economic crisis. The crisis has put between 100 and 120 million direct tourism jobs at risk, many of them in small- and medium-sized enterprises.⁸⁰

Coming out of this difficult time, **there is a need for strong cultural connectedness and empathy.** If anything, this crisis has demonstrated clearly that global communities are strongly interconnected and do not exist in silos, making cooperation and collaboration vital for a viable economic restart. “Unilateral actions can cause confusion and produce unnecessary consequences”, cautions the UNWTO. “More importantly, they can undermine public trust and confidence – precious commodities we have worked so hard to build up over these difficult few months.”⁸¹

Both the film and TV industry, as well as the tourism sector have an important role in restarting economic activity and rebuilding social and cultural links. In understanding how these two sectors complement each other, the global community could leverage this in cultivating stronger connections between communities and countries, as well as igniting a more sustainable approach in the tourism and cultural sectors subject to UNWTO-led guidelines and recommendations for a responsible restart.⁸²

4.2 Recommendations for leveraging cultural affinity and tourism through films and TV series on Internet entertainment services

- **Diverse, accessible and quality content is key.** As highlighted in the first chapter, these three features ensure that local content reaches the widest global audience possible. **Diversity** in terms of representation and range ensures that local content will resonate with different communities and therefore enlarge the size of its global audience. This applies even when certain genres have already been well-established and popular, as when the independent documentary *Period. End of Sentence* from India appealed to a different audience globally than those who typically consumed traditional Bollywood content. **Accessible** features ensure that language or visual/hearing impairments are no longer barriers. And, finally, **prioritizing quality** over quantity ensures that audiences who are spoiled for choice will choose to consume the content.

79 International Labour Organization (2020), ILO Monitor: COVID-19 and the world of work, 5th edition, 30-06-2020 (online), available at: www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/briefingnote/wcms_749399.pdf (19-11-2020).

80 World Tourism Organization (2021), UNWTO World Tourism Barometer, Volume 19, issue 3, May 2021, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422579>.

See also:

World Tourism Organization (2021b), ‘Tourist Arrivals down 87% in January 2021 as UNWTO Calls for Stronger Coordination to Restart Tourism’, UNWTO, Madrid (online), available at: www.unwto.org.

World Tourism Organization (2021a), ‘2020: Worst Year in Tourism History with 1 billion Fewer International Arrivals’, UNWTO, Madrid (online), available at: www.unwto.org.

81 World Tourism Organization (2020d), Statement from Ibiza: COVID-19 Responses Must Not Undermine Solidarity and Confidence, UNWTO, 27-07-2020 (online), available at: www.unwto.org/news/covid-19-responses-must-not-undermine-solidarity-and-confidence (19-11-2020).

82 World Tourism Organization (2021c), UNWTO Inclusive Recovery Guide – Sociocultural Impacts of Covid-19, Issue 2: Cultural Tourism, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422579>.

For Internet entertainment services, this means investing in **developing high quality and authentic local content across a wide variety of genres**. Subtitles, dubbing and accessibility features, too, need to be accurate and authentic – for example, adapted to regional dialects and accents. It is also important to go beyond telling the same types of stories which can feed stereotypes, and instead seek to represent the true variety of local stories and characters.

For governments, this means investing in skills and training to develop the local film and creative sectors to ensure a high level of talent, infrastructure and production capacity to enable high quality local productions. “Artistic and cultural activities at the local level can provide social engagement and employment-creation opportunities that may be useful, for example, as a means of re-engaging displaced social groups such as marginalized youth”.⁸³

- **Alignment between ministries of culture, tourism, film commissions, economic development agencies and the private sector** in order to build focussed strategies around leveraging films and TV series to promote tourism and consumption of local culture. Keeping in mind that the impact of films and TV series go well beyond just influencing travel and tourism choices, there is a need for locally aligned and focussed strategies to encourage global audiences to build an affinity with various aspects of local culture featured on the screen. This can lead to overall better relations between communities, increased appreciation of culture and heritage and spur growth in other industries such as education, gastronomy, trade in cultural goods, as well as music and art.

For Internet entertainment services this is an opportunity to **partner with local stakeholders in showcasing and integrating film content into tourism campaigns and exhibitions**. This can be particularly relevant around showcasing lesser-known tourist destinations or featuring aspects of the communities which do not typically receive a lot of attention.

For governments, this means working towards a **coordinated strategy to encourage investment in such content to maximize resources and impact**, particularly by ensuring that local policies in one area do not contradict these goals in another.

- **Integrating tourism and showcasing culture at film festivals, and vice versa**. To further cement the link between film and TV content with tourism and cultural affinity, it would be useful to leverage community-focussed events to showcase this. For example, organizing screen tourism sections within traditional tourism exhibitions or conferences would draw attention to the important impact of this field and open up the possibility of more ideation and innovation to drive this. Similarly, bringing the tourism angle into film festivals or cultural fairs would also broaden the understanding of how films and TV shows can create strong cultural links and promote travel.

For Internet entertainment services, this is a good opportunity to **leverage their existing relationships and presence in the international film festival circuit and similar fora to draw attention to destinations and cultures featured on screen**. Partnerships can also be imagined with embassies, cultural centres and educational institutions that showcase culture and destinations around the world.

For governments, efforts can be made to **establish these partnerships and carve out space at local and international conferences, festivals, expos and even sporting events** where film and TV series are used to deepen the global audiences’ knowledge about their local culture and travel destinations.

- **Framing strategies and policies in line with the Sustainable Development Goals (SDGs)**. The SDGs provide a universal roadmap to shape both the process of content production, as well as the development of a sustainable tourism sector. For example, SDG 5 – Gender equality – can be fostered in promoting principles of gender empowerment and equality through film and series content as well as promoting women’s role in key parts of the creative process.

83 Throsby, D. (2010), *The Economics of Cultural Policy*, Cambridge University Press, Cambridge, pp. 131–145, DOI: 10.1017/CBO9780511845253.

As Internet entertainment services allocate resources for developing more content globally, it is important that they **invest in training and capacity building of the local population and work closely with producers in a way that promotes gender equality**. The same applies to other areas such as the inclusion of sustainable practices into the production process or raising awareness of sustainability through content to promote positive behaviors with viewers.

Governments can also develop infrastructure that enables such practices to be brought in by the private sector. For example, by investing in electric vehicle infrastructure or ensuring that underrepresented groups in their society have access to education and skills development so that they can develop their careers both in the creative industries, as well as in the tourism sector.

- **Further study and analysis are needed** to better understand the impact of films and TV series on Internet entertainment services in regard to cultural affinity and screen tourism. As noted in the beginning of this publication, while screen tourism has been studied at length, less has been done around the effect of growing cultural affinity and its benefits to the influence of a country, as well as the economic impact. Further, specific study on the differences that IES offer should be analysed in order for this to grow fruitfully. “[Screen] production also generates soft power and national branding, connecting global audiences to a jurisdiction’s locations, stories, way of life and character in a way that can be both powerful and authentic.”⁸⁴ This link is critical and offers the chance for further innovative thinking.

Internet entertainment services and governments, alongside educational institutions and other involved and interested stakeholders should work together to support further research into the cultural affinity and screen tourism phenomenon, including economic analysis of cultural affinity through films and TV series on IES would be helpful in informing local strategies in linking the creative and tourism sectors.

84 Olsberg SPI (2019a), Best Practice in Screen Sector Development, Report for Association of Film Commissioners International, Olsberg SPI, Cineposium Conference (online), available at :<https://www.o-spi.co.uk/new-olsberg%E2%80%A2spi-report-for-afci-on-best-practice-in-screen-sector-development/> (15-10-2020).

Definitions and glossary of some key terms for the purpose of this publication

Activity/activities: In tourism statistics, the term *activities* represent the actions and behaviours of people in preparation for and during a trip in their capacity as consumers.⁸⁵

Competitiveness of a tourism destination: The *competitiveness of a tourism destination* is the ability of the destination to use its natural, cultural, human, man-made and capital resources efficiently to develop and deliver quality, innovative, ethical and attractive tourism products and services in order to achieve a sustainable growth within its overall vision and strategic goals, increase the added value of the tourism sector, improve and diversify its market components and optimize its attractiveness and benefits both for visitors and the local community in a sustainable perspective.⁸⁶

Cultural affinity: The idea of *affinity* has been discussed in a wide range of subjects, from social sciences to marketing. For this paper, we will refer to *cultural affinity* as the *combination of feelings of affection and attachment to a specific culture or lifestyle*. As pointed out by previous research, cultural affinity may influence people's beliefs and perceptions about several dimensions and topics, such as travel, politics, landscape and climate, or gastronomy.⁸⁷ While trust and experience are almost exclusively earned through interactions, cultural affinity can be sparked even before interaction begins. Actually, it may be the initial driver for it.⁸⁸

Cultural tourism: *Cultural tourism* is 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.

These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions.⁸⁹

Films and TV series: For the purposes of this report, *films and TV series* include all genres and shows, i.e., documentaries, reality shows, game shows and others.

Internet entertainment services (IES): *IES* providers deliver films and TV series through the Internet to subscribers. IES subscribers have access to the content across multiple devices. For the purposes of this paper, we will focus mostly on *global IES* – such as Netflix, Amazon Prime, HBO Max or Disney Plus.

Local content: For the purpose of this paper, this term indicates *curated video content* such as movies, TV series, documentaries, reality shows, or other types of videos produced or staged in one country and then seen and exported abroad, gathering audiences around the world. This includes “non-Hollywood” productions.

Screen tourism or film tourism: When a tourist visits a destination or attraction as a result of the destinations being featured on a screen. *Screen tourism* or *film tourism* is a growing phenomenon worldwide, accelerated by the growth of the entertainment industry and expansion in international travel.⁹⁰

Seasonal adjustment: *Seasonal adjustment* is a statistical technique to remove the effects of seasonal calendar influences on a TV series. Seasonal effects usually reflect the influence of the seasons themselves, either directly or through production series related to them, or social conventions. Other types of calendar variation occur as a result of influences such as number of days in the calendar period, the accounting or recording practices adopted or the incidence of moving holidays.⁹¹

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Tourism destination: A *tourism destination* is a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness.⁹²

Tourism expenditure: *Tourism expenditure* refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.⁹³

Tourism product: 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 center 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.⁹⁴

Tourism industries: *Tourism industries* comprise all establishments for which the principal activity is a tourism characteristic activity. Tourism industries (also referred to as tourism activities) are the activities that typically produce tourism characteristic products.⁹⁵

Tourism sector: The *tourism sector* [...] is the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called *tourism industries* because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, their production of these would cease to exist in meaningful quantity.⁹⁶

Tourist (or overnight visitor): A *visitor* [...] is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.⁹⁷

Travel / traveller: *Travel* refers to the activity of *travellers*. A *traveller* is someone who moves between different geographic locations, for any purpose and any duration. The *visitor* is a particular type of traveller and consequently tourism is a subset of travel.⁹⁸

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Cultural Affinity and Screen Tourism – The Case of Internet Entertainment Services, has been produced by the World Tourism Organization (UNWTO) in partnership with Netflix. It goes beyond the traditional concept of screen tourism and explores how the online distribution of films and TV series can strengthen cultural ties between countries and build bridges between communities while at the same time fostering tourism as a pillar of the 2030 Agenda for Sustainable Development. Based on extensive desk research and the results of a series of surveys, it sheds light on how best to maximize the social, economic and cultural benefits of screen tourism and offers both policymakers and the private sector recommendations on how to leverage internet entertainment services (IES) to promote unique and shared culture and traditions.



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